



Telephone Integration for Microsoft CRM 4.0 (TI)

Version 4.0

Users Guide

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1 Introduction

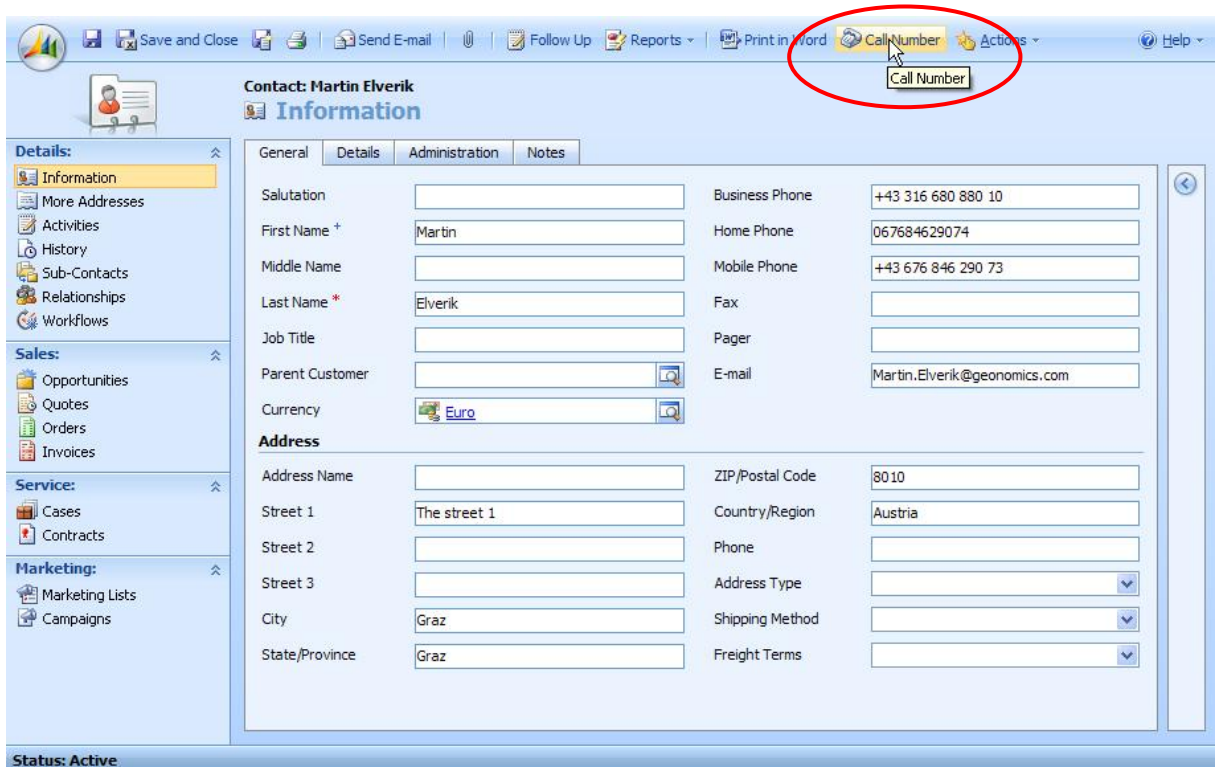
Telephone Integration for Microsoft CRM 4.0 (**TI**) is a CRM Add On which enables you to connect your Telephone System (CTI) to Microsoft CRM 4.0. It works in both directions (incoming and outgoing) and is easy to handle.

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

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

2 Outgoing calls

Go to your Account or Contact and open it.

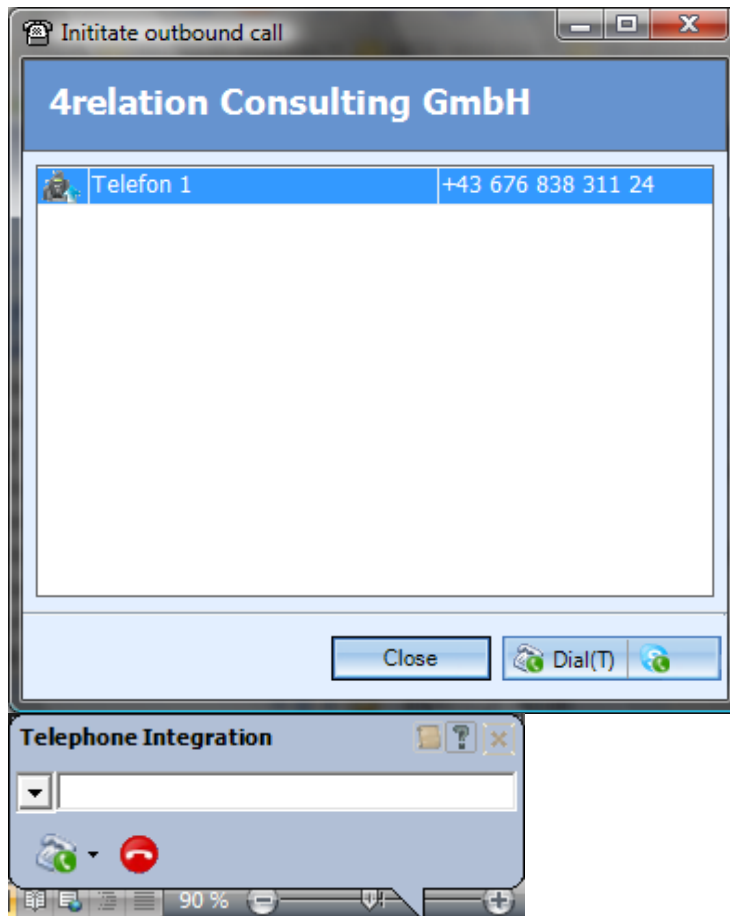


The screenshot shows the Microsoft CRM 4.0 interface for a contact named Martin Elverik. The contact record is open, and the 'Call Number' button is highlighted with a red circle. The contact details are as follows:

Field	Value
Salutation	
First Name	Martin
Middle Name	
Last Name	Elverik
Job Title	
Parent Customer	
Currency	Euro
Business Phone	+43 316 680 880 10
Home Phone	067684629074
Mobile Phone	+43 676 846 290 73
Fax	
Pager	
E-mail	Martin.Elverik@geonomics.com
Address Name	
Street 1	The street 1
Street 2	
Street 3	
City	Graz
State/Province	Graz
ZIP/Postal Code	8010
Country/Region	Austria
Phone	
Address Type	
Shipping Method	
Freight Terms	

Then just click on [Call Number]

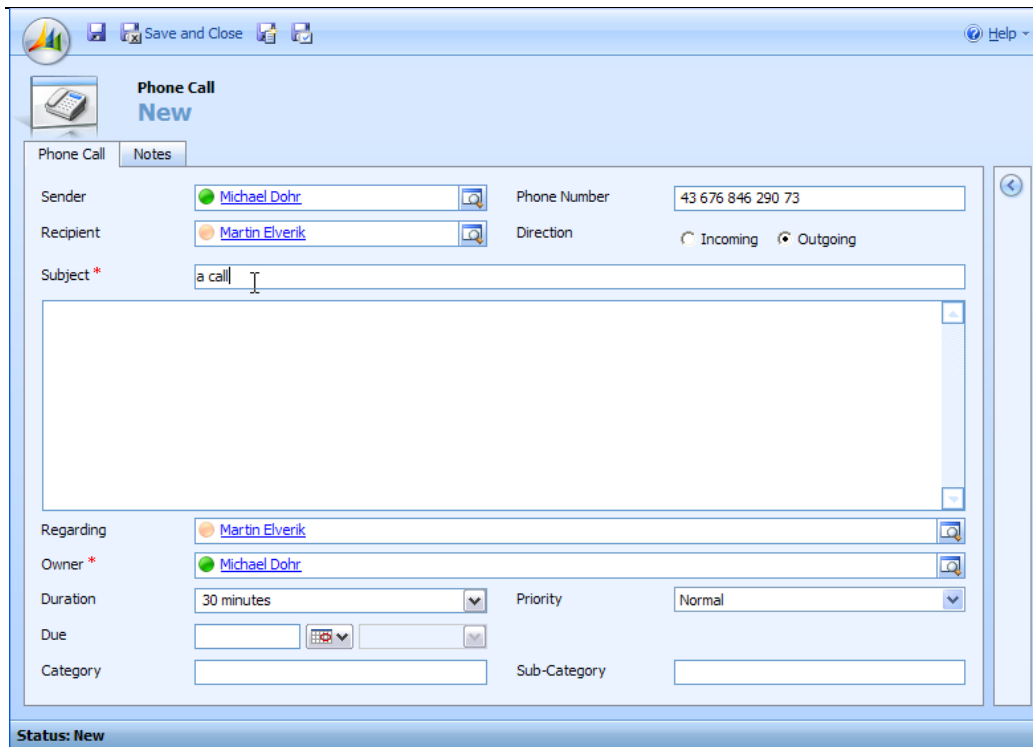
The new Web Page Dialog with all available numbers opens.



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

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

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



The screenshot shows a web-based form for creating a new phone call. The form is titled "Phone Call New" and has a "Phone Call" icon on the left. It features two tabs: "Phone Call" (selected) and "Notes". The form fields are as follows:

- Sender:** Michael Dohr (with a search icon)
- Recipient:** Martin Elverk (with a search icon)
- Subject*:** a call (with a text cursor)
- Phone Number:** 43 676 846 290 73
- Direction:** Radio buttons for "Incoming" and "Outgoing" (with "Outgoing" selected)
- Regarding:** Martin Elverk (with a search icon)
- Owner*:** Michael Dohr (with a search icon)
- Duration:** 30 minutes (with a dropdown arrow)
- Priority:** Normal (with a dropdown arrow)
- Due:** Two empty date pickers
- Category:** Empty text field
- Sub-Category:** Empty text field

At the bottom of the form, there is a status indicator: **Status: New**. The top of the window shows standard application controls: a "Save and Close" button, a "Help" menu, and a "Phone Call" icon.

3 Incoming Call

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



3.1 Balloon Element (Complex)

The balloon is the central Element on the client side.


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

The 5 Sections identified in the image to the right are


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


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


2.) The Balloon functions are:

 Enable custom sizing

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

 Show History

 Show Help

 Hide Balloon window



3.) The TAPI functions are:



Pick up Receiver / Accept Call



Disconnect

4.) CRM functions:



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



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



Create new contact based on the phone number



Create new account based on the phone number

5.) Call function

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



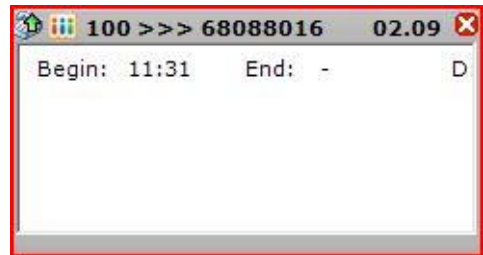
Clicking on this area hides the call function field. The Icon changes to:

Clicking on this area shows the call function field.

3.1.1 Call Details

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

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











Color coding indicates missed incoming calls. Example for a missed call. Note the call time is being replaced by the date of the call.








Expanding the call shows the time, when call has happened



Following call state icons are possible:

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

Following CRM state icons are possible:

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

3.1.2 Multiple targets

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

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



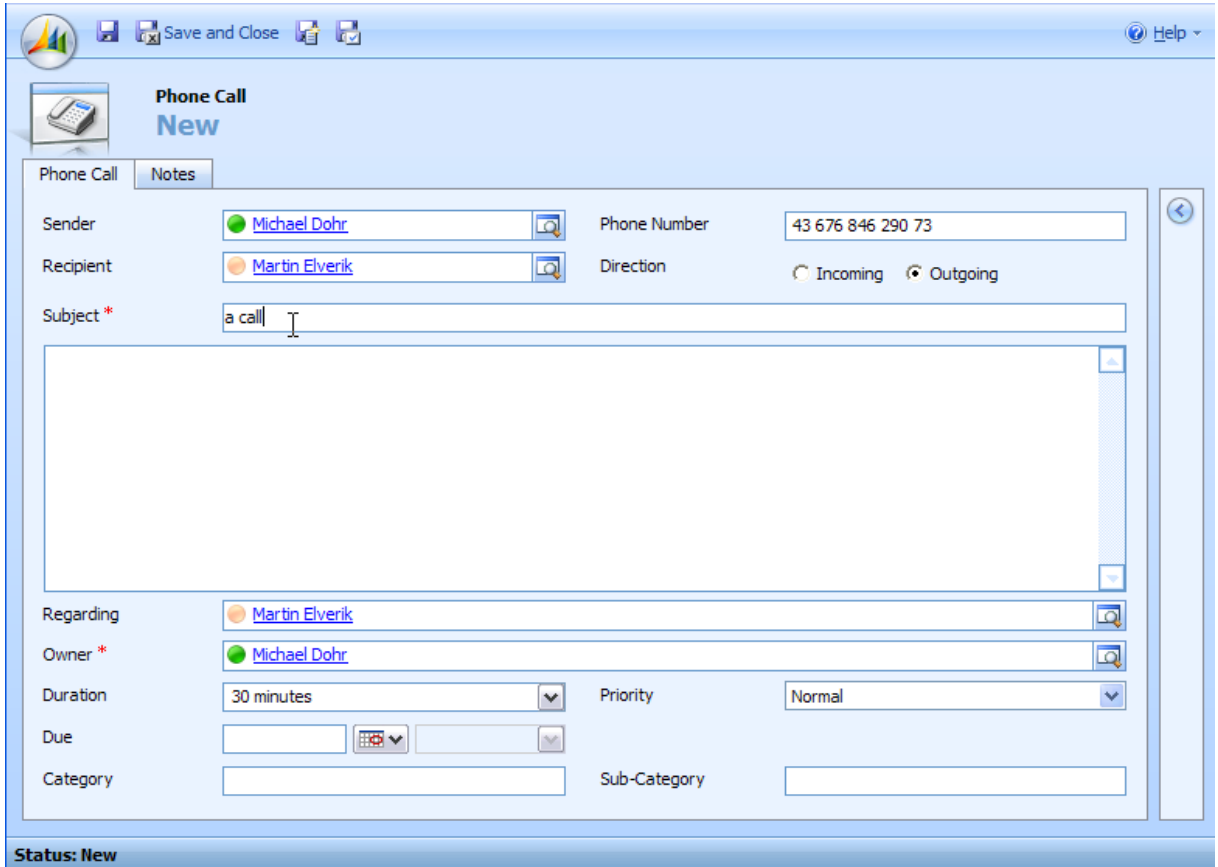
The detail window shows all possible entries with an icon according to their entity-type.

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

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

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

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



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

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

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

Contact/Account might be opened.

To define the desired behaviour see → 4. Configuration

3.2 Balloon Element (Simple)

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

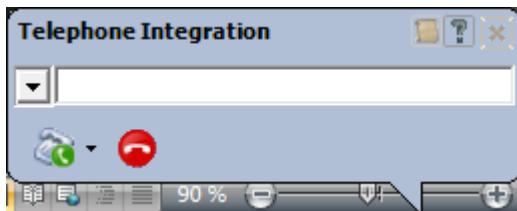


The information on the popup will be updated with information being provided by the TAPI Driver and, if existing, the CRM contact information.



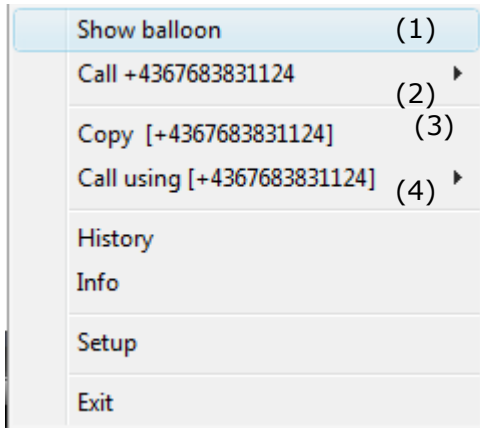
The telephone symbol on the left side will indicate the call direction of the call activity that has been detected on the telephone.

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



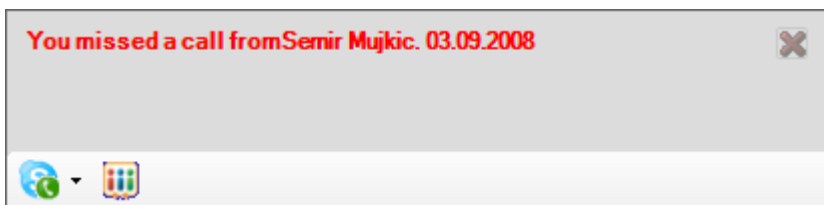
The callout control can still be reached via a double click on the CTI component or with the Show Balloon command.

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



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

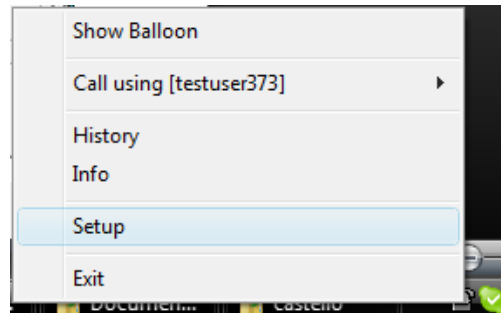
Missed calls will be displayed as notifications on your screen.



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

4 Configuration

To change the configuration start *Telephone Integration Setup*.



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

Telephone Integration Setup

Behaviour | Balloon | SkypeWrapper | TAPI

Incoming Calls

Minimum number digits to enable processing

Do actions below when lifted on call notice

open entity on call

open new if caller is unknown

open phone call activity Also on unrecognized

generate new phone call activity (and allways store it)

only show new phone call activity

Outgoing Calls

open entity on call

generate new phone call activity (and allways store it)

only show new phone call activity

Misc

activate Debugging Launch TI on System Startup

Windowparam - just change it when you know what you are doing!

remove leading zero on all calls

Include deactivated entities PartialSearch

SetupConnection Save

INCOMING CALLS:

General:

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

When lifting receiver:

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

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

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

OUTGOING CALLS:

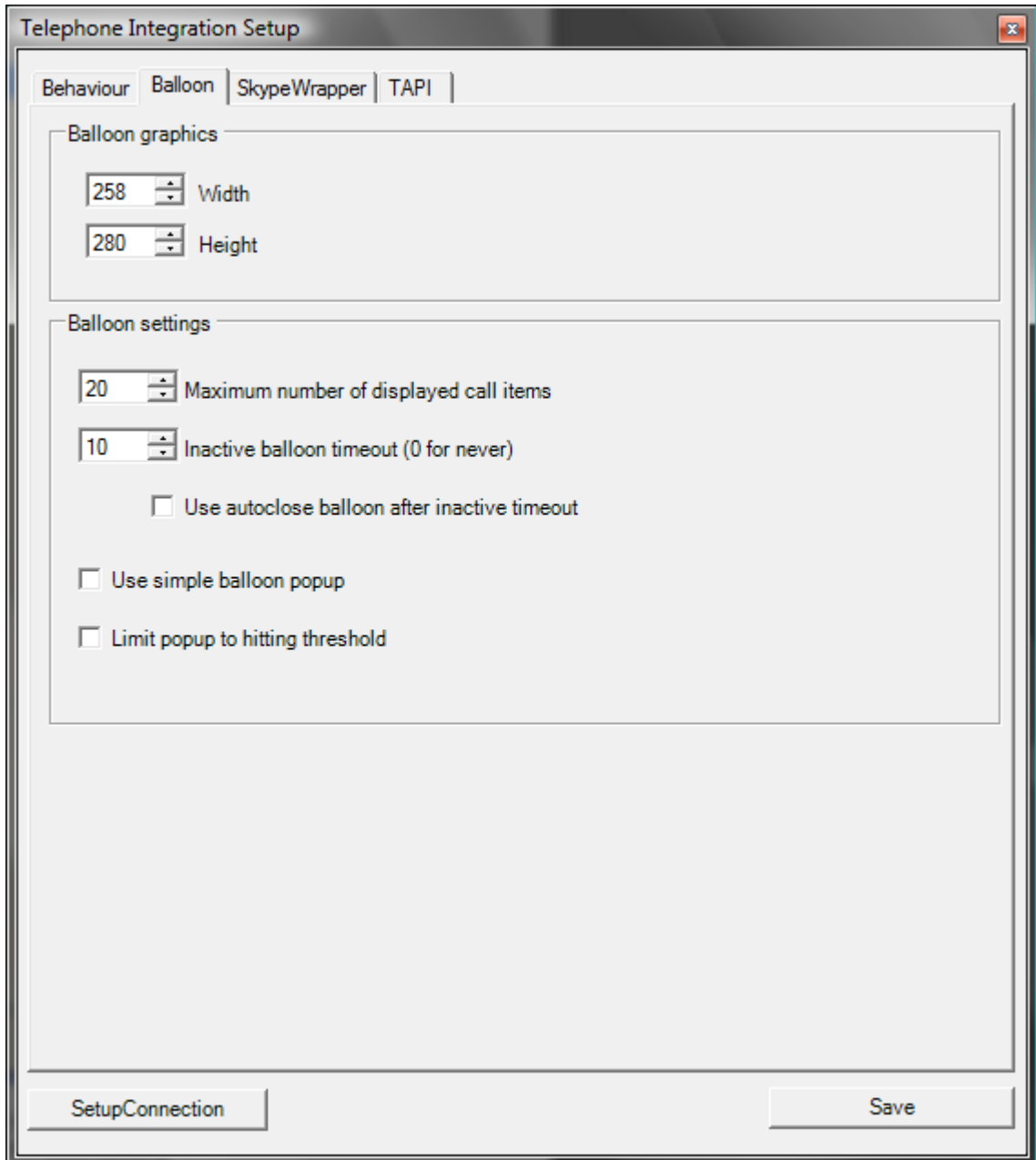
open phone call activity: if you are called and you lift the handset **TI** will create a Phone Call Activity...

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

MISC:

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

4.1 Balloon settings



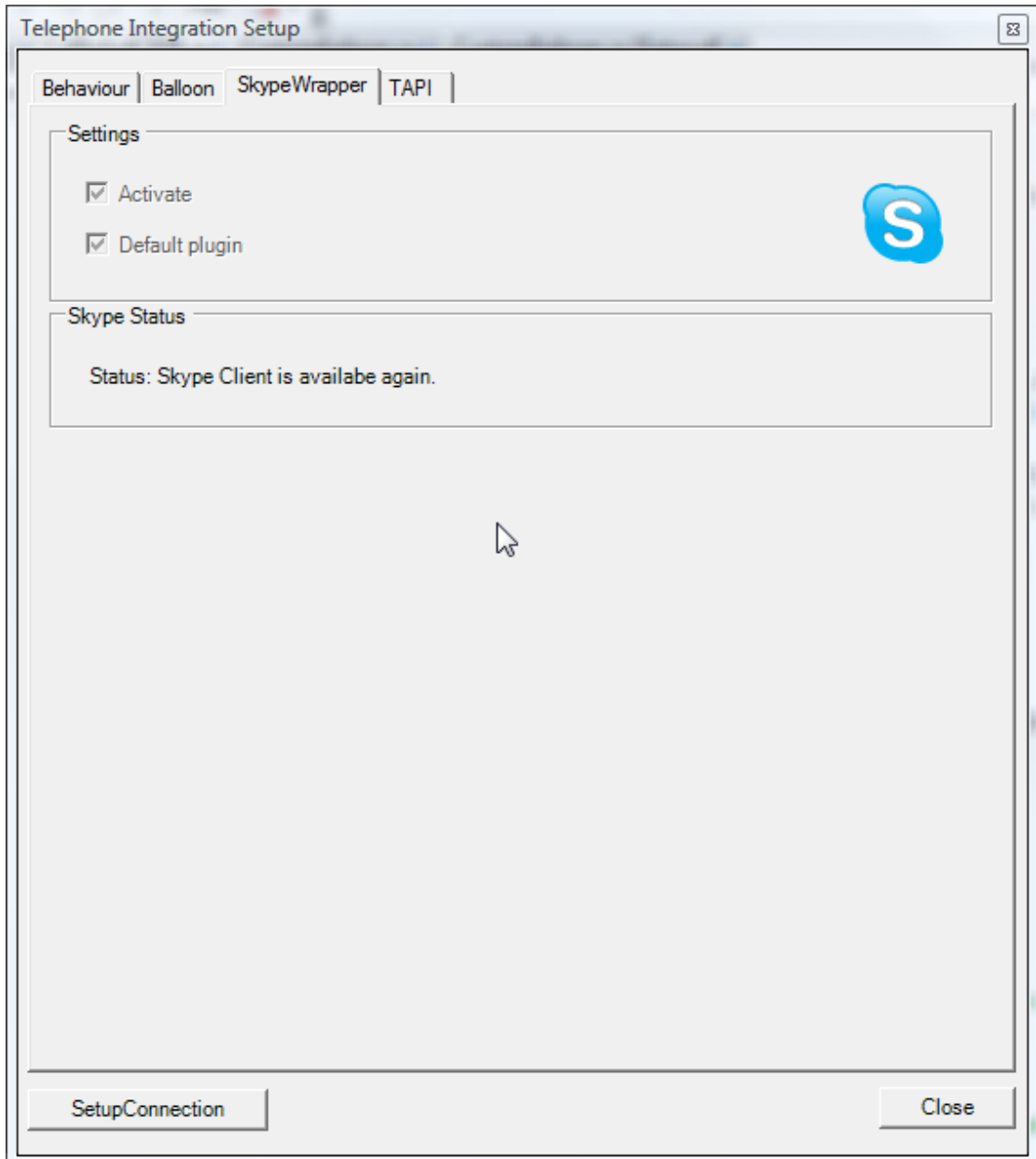
Under "Balloon graphics" the dimensions of the balloon can be altered. An easier way is using the resize function on the balloon window (see → 3.1 Balloon Element).

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

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

4.2 Skype-TabPage

4.2.1 Skype-Plugin Configuration



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)

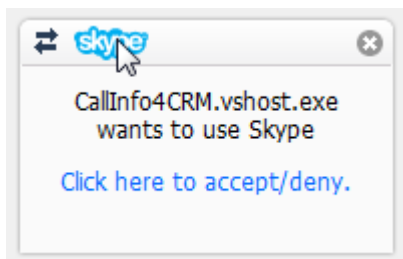
Status: Shows the current status of the Skype Plugin.

4.2.2 Skype-Plugin Authorization

Starting TI

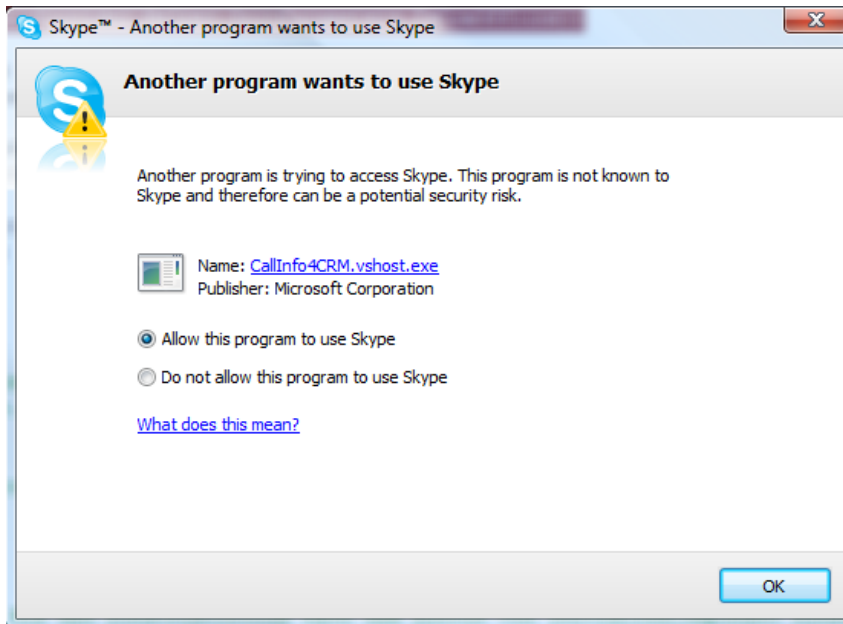
After starting Telephone Integration you will get an Authorization Request message from your Skype-Client (only for the first time):

1. (Taskbar-Popup)



Click on "Click here to accept/deny".

2. (Skype-Authorization Popup)

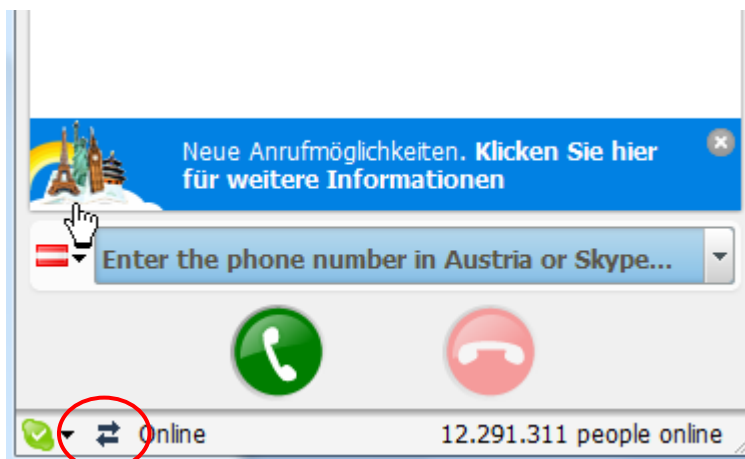


Please choose "Allow this program to use Skype" and confirm with "OK". Skype-Plugin should now be ready for usage!

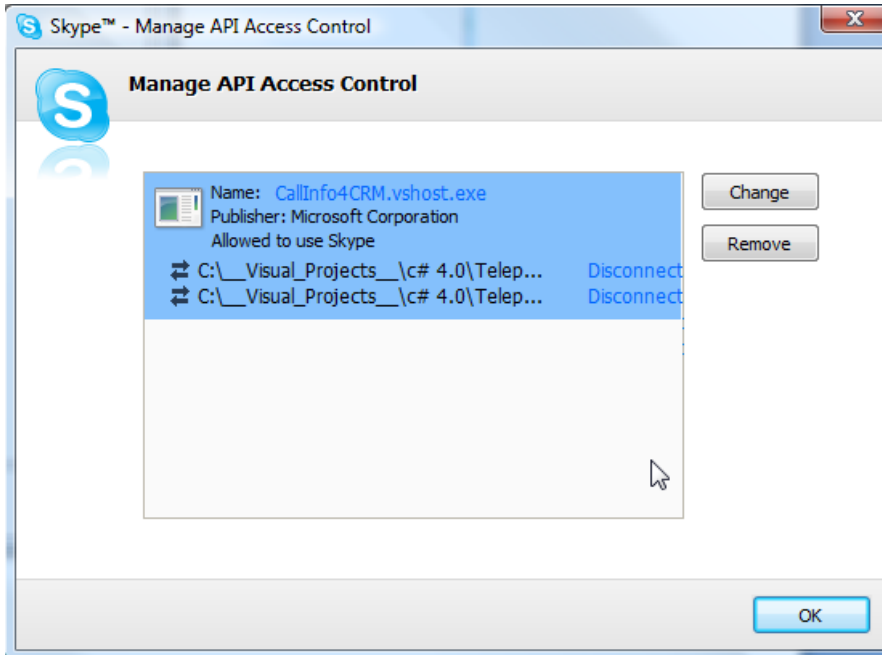
Manually Manage API Access Control

You have the opportunity to manually control the access of programs to the Skype client:

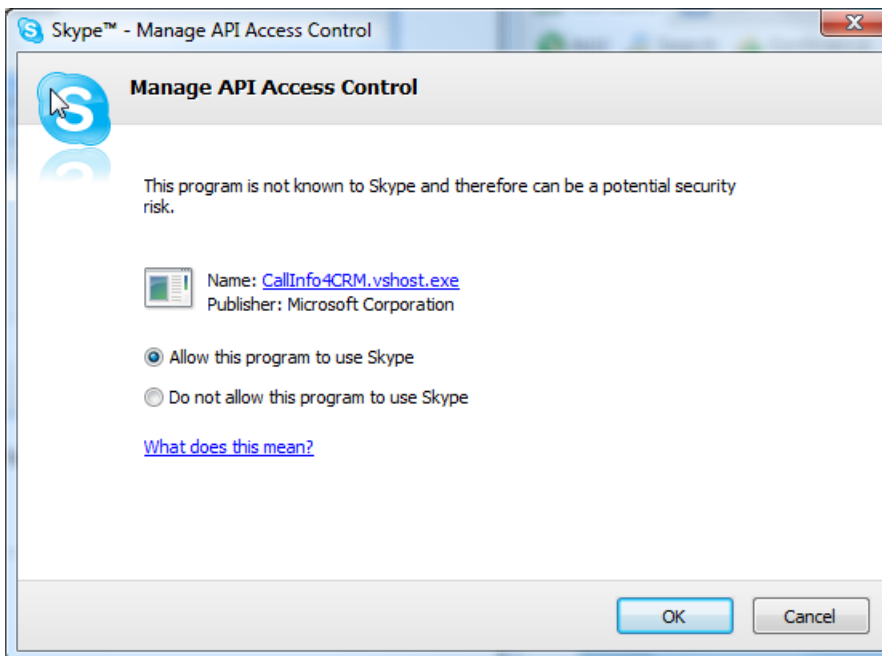
1. Click on the arrow symbol.



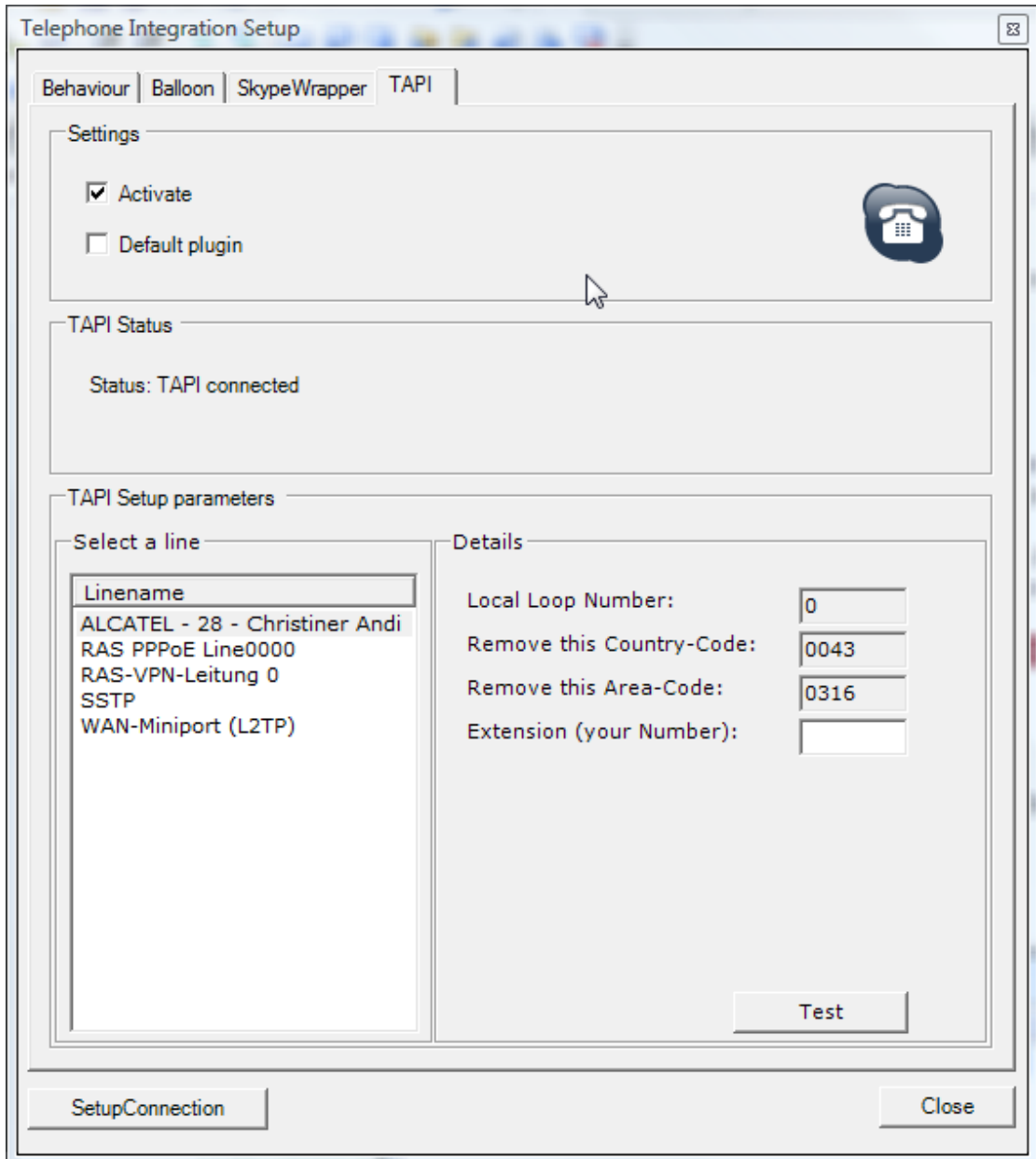
2. "Manually Manage API Access Control" pops up. Click on "Change" button



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



4.3 TAPI



Settings:

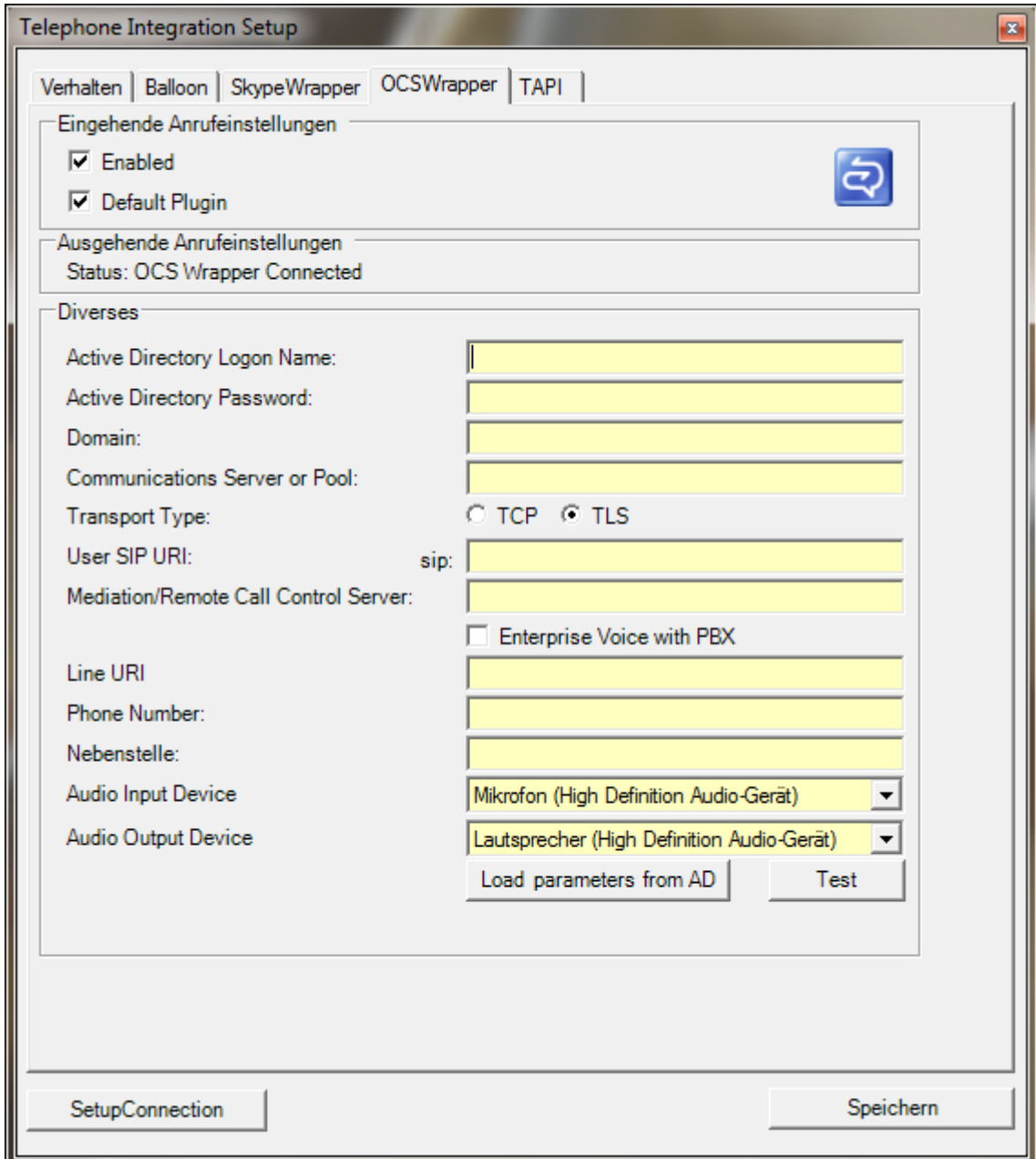
activate : here you can enable/disable TAPI.

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

4.4 OCS Wrapper



The screenshot shows the 'Telephone Integration Setup' dialog box with the 'OCSWrapper' tab selected. The dialog has several sections:

- Verhalten | Balloon | SkypeWrapper | OCSWrapper | TAPI** (Navigation tabs)
- Eingehende Anrufeinstellungen** (Incoming Call Settings):
 - Enabled
 - Default Plugin
- Ausgehende Anrufeinstellungen** (Outgoing Call Settings):
 - Status: OCS Wrapper Connected
- Diverses** (Miscellaneous):
 - Active Directory Logon Name: [Text Field]
 - Active Directory Password: [Text Field]
 - Domain: [Text Field]
 - Communications Server or Pool: [Text Field]
 - Transport Type: TCP TLS
 - User SIP URI: sip: [Text Field]
 - Mediation/Remote Call Control Server: [Text Field]
 - Enterprise Voice with PBX
 - Line URI: [Text Field]
 - Phone Number: [Text Field]
 - Nebenstelle: [Text Field]
 - Audio Input Device: Mikrofon (High Definition Audio-Gerät) [Dropdown]
 - Audio Output Device: Lautsprecher (High Definition Audio-Gerät) [Dropdown]
 - Buttons: Load parameters from AD, Test

At the bottom of the dialog are two buttons: 'SetupConnection' and 'Speichern'.

All fields must be provided with the correct information otherwise the wrapper will not be able to log onto the OCS system properly.

The login information should be provided as follows:

- Active Directory Logon Name
 - Regular Active Directory username

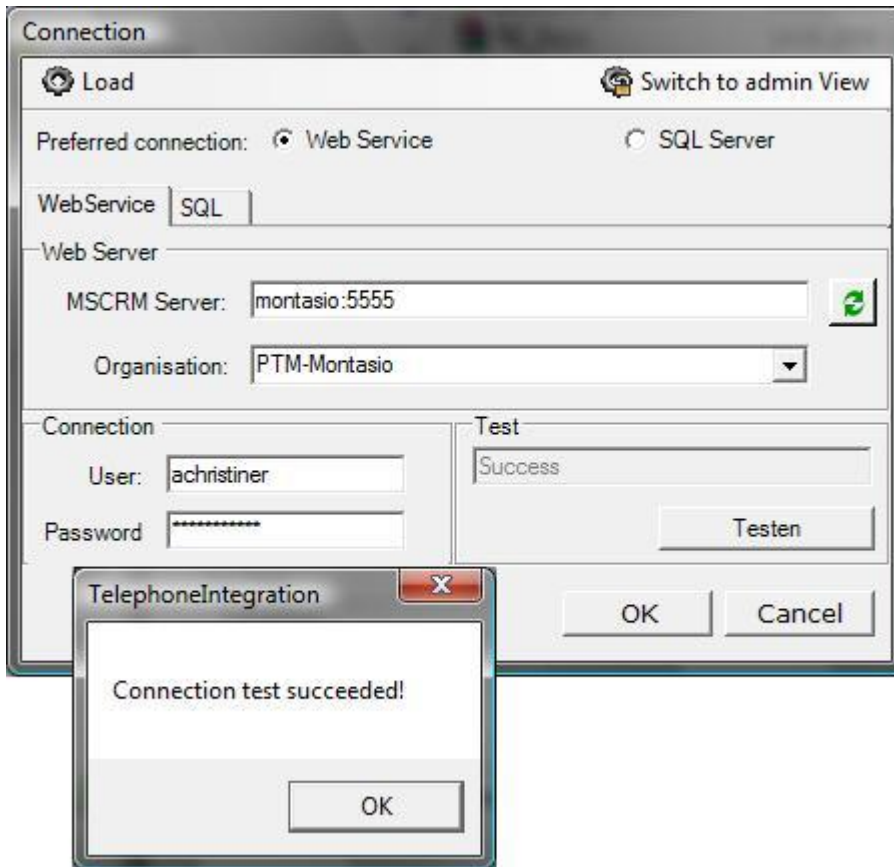
-
- Active Directory Password
 - Regular Active Directory user password
 - Domain
 - The Active Directory domain (e.g. mydomain.com)
 - Communications Server or Pool
 - OCS Frontend server name (e.g. ocs.mydomain.com)
 - Transport Type
 - Type of connection used by OCS system
 - User SIP URI
 - The SIP URI for that user. 'sip:' at the beginning is optional and added if omitted. (e.g. 'myFirstname.MySecondName@myDomain.com' and 'sip:myFirstname.MySecondName@myDomain.com' are both acceptable)
 - Mediation/remote Call Control Server
 - Mediation or telephone control server name (e.g. callcontrol.mydomain.com)
 - Enterprise Voice with PBX
 - A checkbox indicating if the Enterprise Voice configuration is linked to a PBX system. Should be checked if that is the case.
 - 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:+43316123456;ext=123".
 - Phone Number
 - The basic telephone number **without** extension (e.g. +43316123456)
 - Extension ("Nebenstelle" in image)
 - The extension of the telephone that should be used to route calls to/from

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 "Test" button allows you to test the connection using the newly entered credentials. It will take a short while to complete (the previous connection is shut down and the new established) the test and will give a success or failure message.

4.5 Server Settings

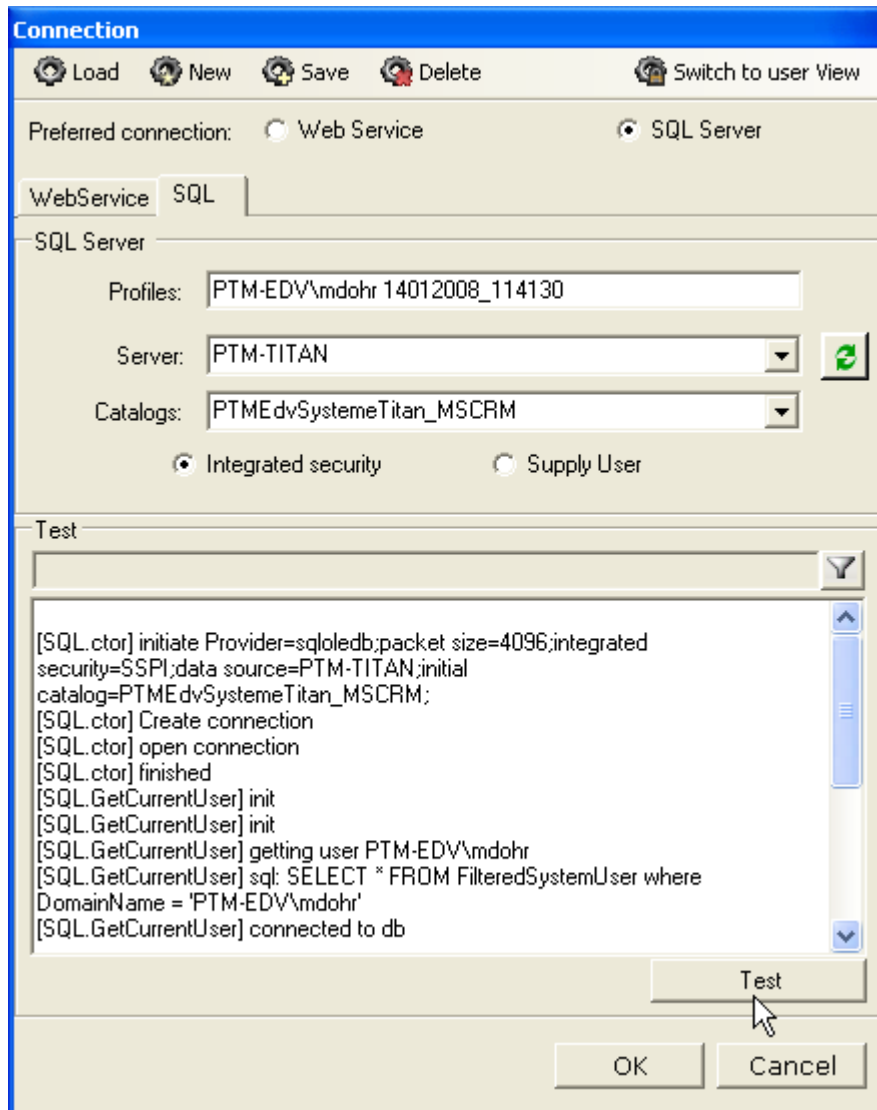
Switch to admin view to see detailed informations of the test and possible errors.




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

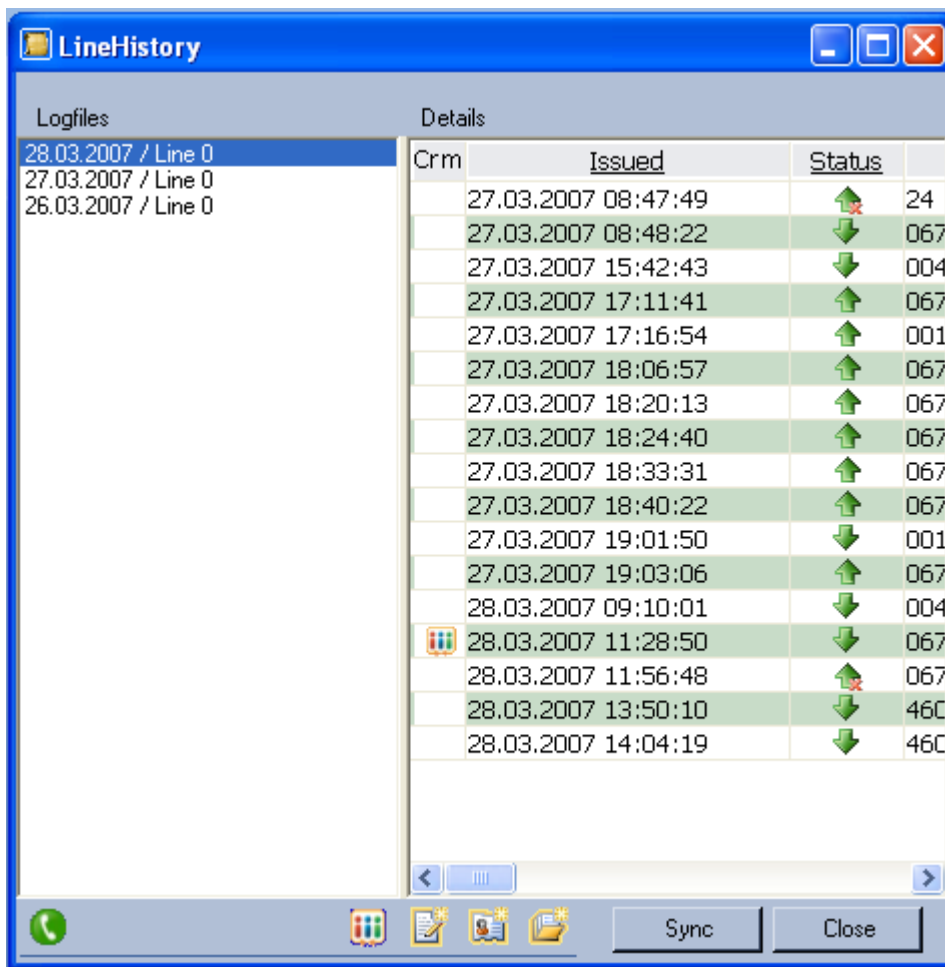
For example: tilsiter: 5554

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



5 Show History

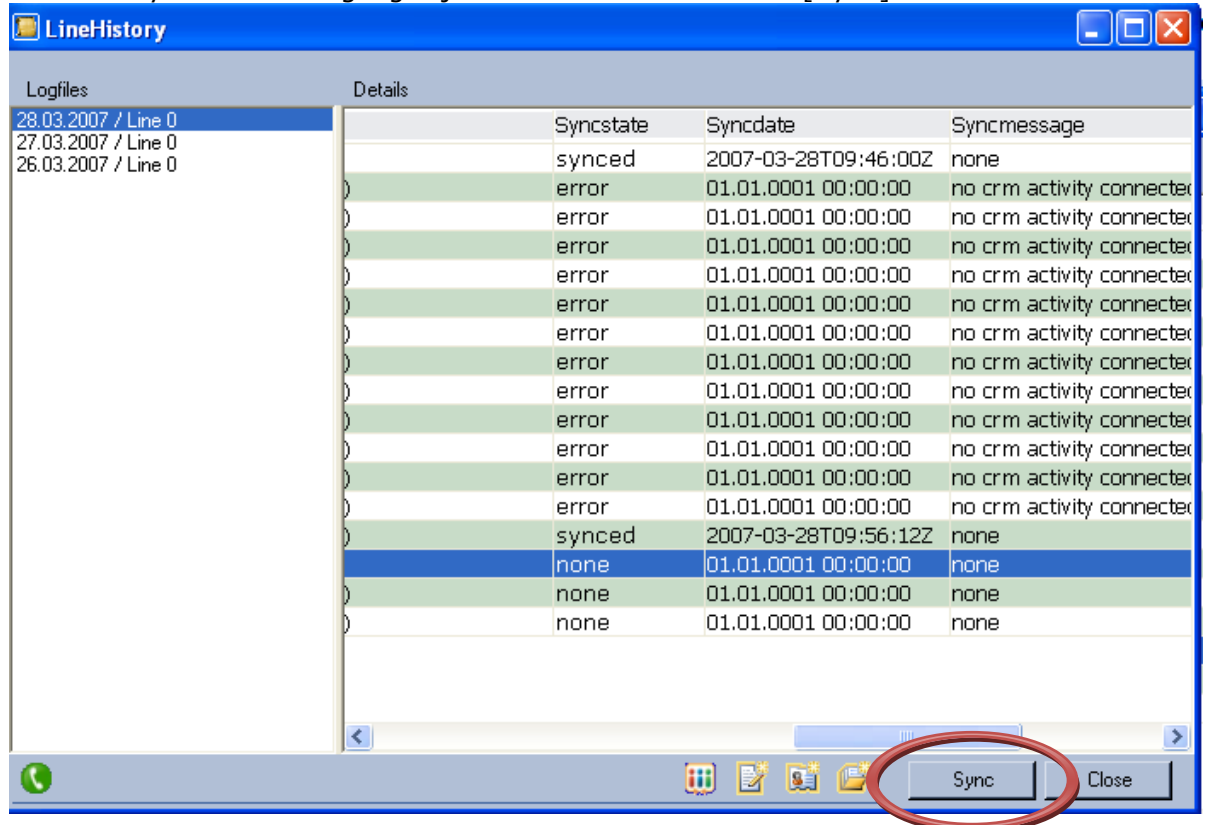
If you click the left mouse button on this icon , the following window will open:



In the left panel you can select different logfiles by day and line.
 In the right panel the incoming and outgoing calls will be listed in detail.


Now you have the possibility to synchronize TI with your CRM system, if the call is connected to a CRM activity.

Therefore you have to highlight just a call and click on the [Sync]-button.



5.1 Icon Details



This button opens the CRM entity, that is associated with a specific call. (only if the "CRM"-column of the selected line shows this  Icon)



Creates a new activity for the Entity associated with the call.



Creates a new contact based on the phone number.



Creates a new account based on the phone number.



Accept incoming call

6 Contact

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