

TelephoneIntegration Compatibility Test Tool for Microsoft Dynamics 365

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(How to test the compatibility of user's phone system with TelephoneIntegration for Dynamics 365)

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CONTENT

1	Purp	ose of TelephoneIntegration Compatibility Test Tool	3	
2	How	to test your phone system?	4	
	2.1	Start the tool	4	
	2.2	Select the plugin	4	
	2.3	Configure plugin	5	
	2.4	Grant access	6	
	2.5	Test incoming call	7	
	2.6	Test outgoing call	8	
3	Sum	mmary		
4	List o	of figures	.10	
5	Cont	act	.11	



Preamble and target audience

This documentation guides you through the test of the compatibility of your phone system with the TelephoneIntegration addon for Microsoft Dynamics 365.

This guide is intended for users who would like to test the compatibility of their phone systems.

1 Purpose of TelephoneIntegration Compatibility Test Tool

With the test tool, you get the possibility to test the compatibility of your phone system with the TelephoneIntegration addon for Dynamics 365.

The tool offers two communication channels. You need only one of them to be able to use our CTI.

Via TAPI

For testing, via TAPI you require a valid TAPI driver from your phone system vendor. You must first install the client side TAPI driver if this option is given. Restricted rights to use the TAPI driver can result in a faulty TAPI client application in case that the call information (caller/caller number or call state information) is not seen or that the client application has no right to alter the call. For this reason please grant full access rights to use the TAPI driver if that option is given.

Via SIP

For testing SIP protocol, you need a valid sip user account. For this, you require SIP username, SIP password and SIP domain (PBX server).



2 How to test your phone system?

The testing consists of 7 steps you have to follow:

- 1. The tool can be downloaded and downloaded from our website.
- 2. After the extraction, start the PhoneTest.exe.
- 3. Select your desired channel of communication (TAPI or SIP).
- 4. Test an incoming call.
- 5. Test an outgoing call.
- 6. Evaluate the results.

2.1 Download and start the tool

First, please download the ZIP file <u>here</u>, extract and open it by hitting the PhoteTest.exe file. Start the tool and press the **[Get Started]**-button as you can see below.



2.2 Select the plugin

Next, please choose the plugin interface you want to test.

1 Choose Plugin	2 Configure Plugin	3 Test Incoming Call	4 Test Outgoing Call	5 Summary
[ТАРІ		SIP	
Choose the Plugin i	interface you wan	t to test.		
TAPI plugin operate	es on the TAPI driv	/er.		
SIP plugin acts as a	softphone using	SIP protocol.		
	Can	cel	Vext	

Figure 2: Choose the plugin interface you want to test



2.3 Configure plugin

If selecting **TAPI**, you need to select your TAPI line provided by your TAPI driver and hit the *[Next]*-button. Please note: If the selected line cannot be activated, the *[Next]*-button will stay disabled.

ΤΑΡΙ	SIP	
		Select your TAPI line bellow and press Next for continue
		28 : pkorosec
		O 18 : ckokely
		[28 : pkorosec] Registration OK. Proceed Next
		Back Next
Figure 3: (Configur	e plugin via TAPI

If selecting **SIP**, you need to type in your SIP credentials – your username, password and the domain as you can see below.

			2	3		5
	Choose Plugin		Configure Plugin	Test Incoming Call	Test Outgoing Call	Summary
TAPI		SIP				Advanced
			Username			
			39			
			Password			
			9Xr&=2F			
			Domain			
			3cx.ptm-edv.at			
Figur	e 4: Confi	gure p	olugin via SIP			

5



2.4 Grant access

In the *firewall*-window please grant access to the phone test tool as you can see in the figure below.

Choose Configure Test Test Plugin Plugin Incoming Call Outgoing Call Summary
TAPI SIP
Attention: To test this feature, please call on your designated number and accept the call.
Windows Security Alert
Windows Defender Firewall has blocked some features of Phone Test Tool on all public, private and domain networks. Image: Stress Phone Test Tool Publisher: Unknown Path: C: \users\administrator\documents\test\phonetest.exe Allow Phone Test Tool to communicate on these networks:
Domain networks, such as a workplace network
Private networks, such as my home or work network
Public networks, such as those in airports and coffee shops (not recommended because these networks often have little or no security)
What are the risks of allowing an app through a firewall?

Figure 5: Grant access to the phone test tool



2.5 Test incoming call

After successful registration with your SIP user account, you can now test an incoming call. Hit the *[Continue]*-button in order to do that.



Back	Continue
	En .

Accept or decline the call by clicking one of the buttons.



Figure 7: Accept or decline call



It is also possible to perform direct call like for example to transfer it to another extension.

	03166	58088067 8088067	×	G→G
	00:44	Connected		81
Inc	coming	History Calls		TRANSFER
	Ľ	031668088067 031668088067	via sip 00:00	(i)
	Ľ	031668088067 031668088067	via sip 00:31	i
	Ľ	031668088067 031668088067	via sip 00:57	i
	Ľ	Test Test 67	via sip 00:10	()

Figure 8: Transfer the phone call to another extension

2.6 Test outgoing call

In order to test outgoing calls, please type in the number you want to call and hit the phone symbol to dial the number.



At the bottom, you will find enabled features listed that were successfully tested.





3 Summary

In the end, we evaluate the incoming and outgoing call. We check if the caller/caller number was detected if the Answer/EndCall operation is possible and if we can observe the state of the call. If everything is green, then the TelephoneIntegration addon is compatible with your phone system as you can see in the figure below.

	Choose Plugin	Configure Plugin	Test Incoming Call	Test Outgoing Call	Summary
TAPI	SIP				
		Success: You	've succesfully configu	red SIP plugin	
Calls Type					Status
Ľ	Incoming Cal	I			٠
		Caller ID detect	ed: 🔴	Answer operation av	ailable: 🔵
		Connected state	e detected: 🔵	EndCall operation av	ailable: 🔴
S	Outgoing Cal	I			•
		Called ID detect	ted: 🔴		
		Connected state	e detected: 🔵	EndCall operation av	ailable: 🔴

Figure 11: Evaluation of the incoming and outgoing calls



4 List of figures

Figure 1: Get Started	.4
Figure 2: Choose the plugin interface you want to test	.4
Figure 3: Configure plugin via TAPI	5
Figure 4: Configure plugin via SIP	5
Figure 5: Grant access to the phone test tool	6
Figure 6: Test incoming call	.7
Figure 7: Accept or decline call	.7
Figure 8: Transfer the phone call to another extension	.8
Figure 9: Test outgoing calls	8
Figure 10: Successfully tested features	8
Figure 11: Evaluation of the incoming and outgoing calls	9



5 Contact

For further technical questions, please visit our blog <u>http://blogs.mscrm-addons.com</u> or contact <u>support@mscrm-addons.com</u>.

For sales and licensing questions please contact <u>office@mscrm-addons.com</u> or the corresponding contact information below.



Headquarter – Europe

PTM EDV-Systeme GmbH Bahnhofgürtel 59 A-8020 Graz Austria

Tel Austria +43 316 680-880-0 Fax +43 316 680-880-25

Support: 7AM - 8PM GMT+1 (Monday-Friday)

Headquarter – US

mscrm-addons.com Corp 1860 North Rock Springs Rd Atlanta, GA 30324 United States

Tel US +1 404 720 6066

Support: 9AM - 6PM EST (Monday-Friday)

Sales: +43 316 680 880 14 sales@mscrm-addons.com

www.ptm-edv.at www.mscrm-addons.com Sales: +1 404 720 6046 ussales@mscrm-addons.com

www.mscrm-addons.com