



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

Version 4.0

How To Install Guide

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1 Installing TI for MS CRM 4

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

The installation consists of the following steps:

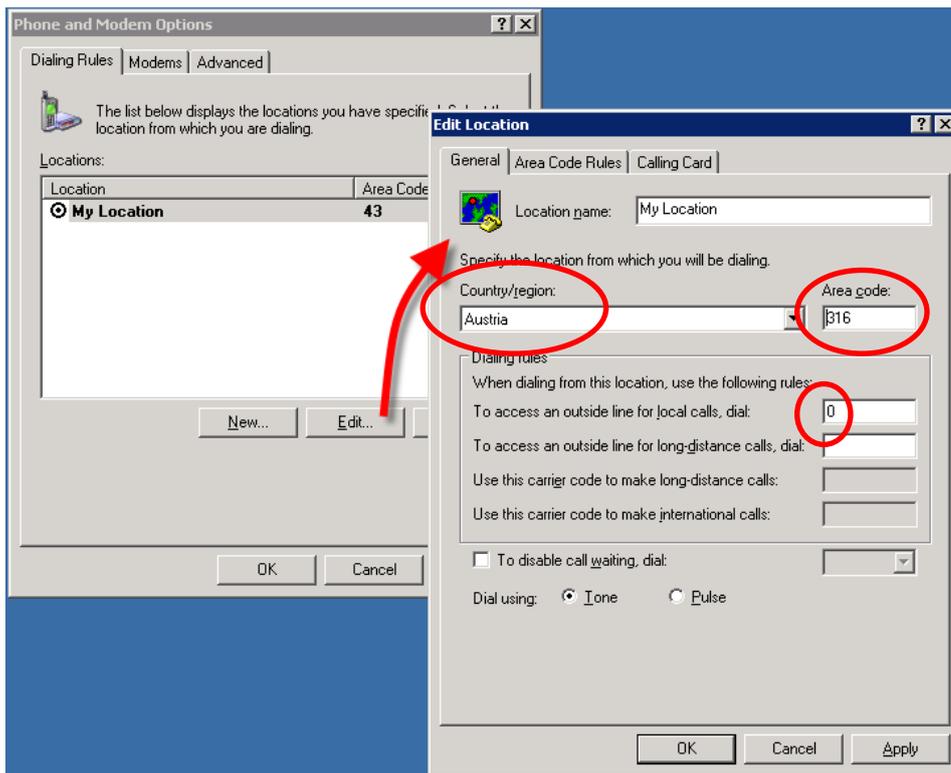
Follow each of the following steps, to complete the installation:

1. Installing TI MS CRM 4
2. 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 function correctly when you try to dial a number 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 store 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.

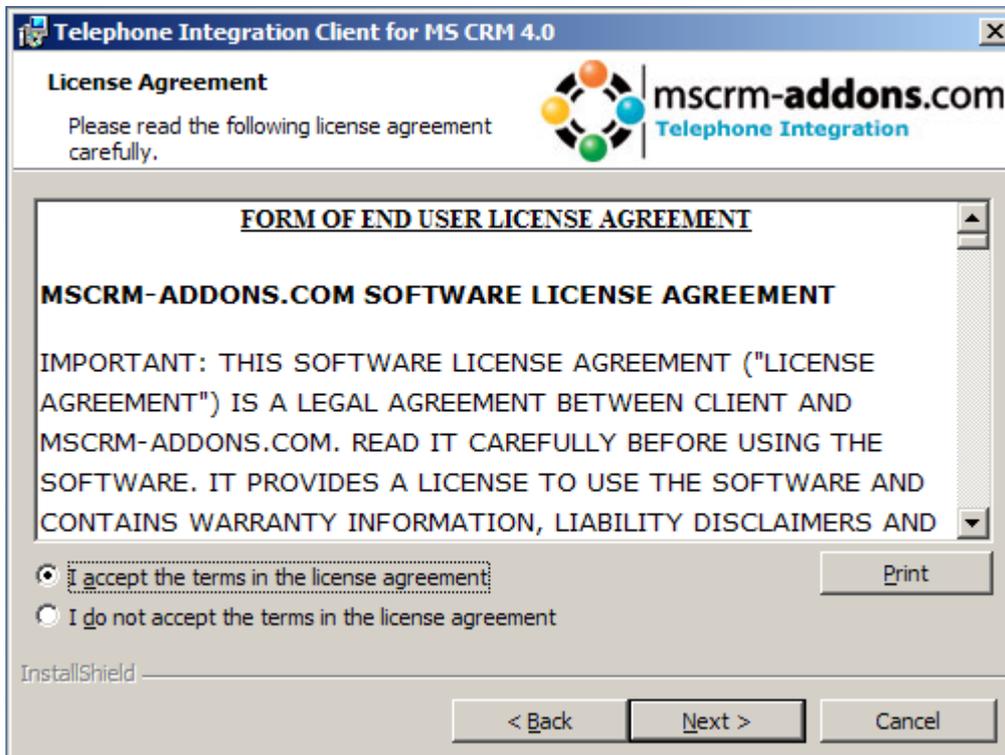
2 TI for MS CRM 4 Setup

Now the Telephone Integration setup starts.

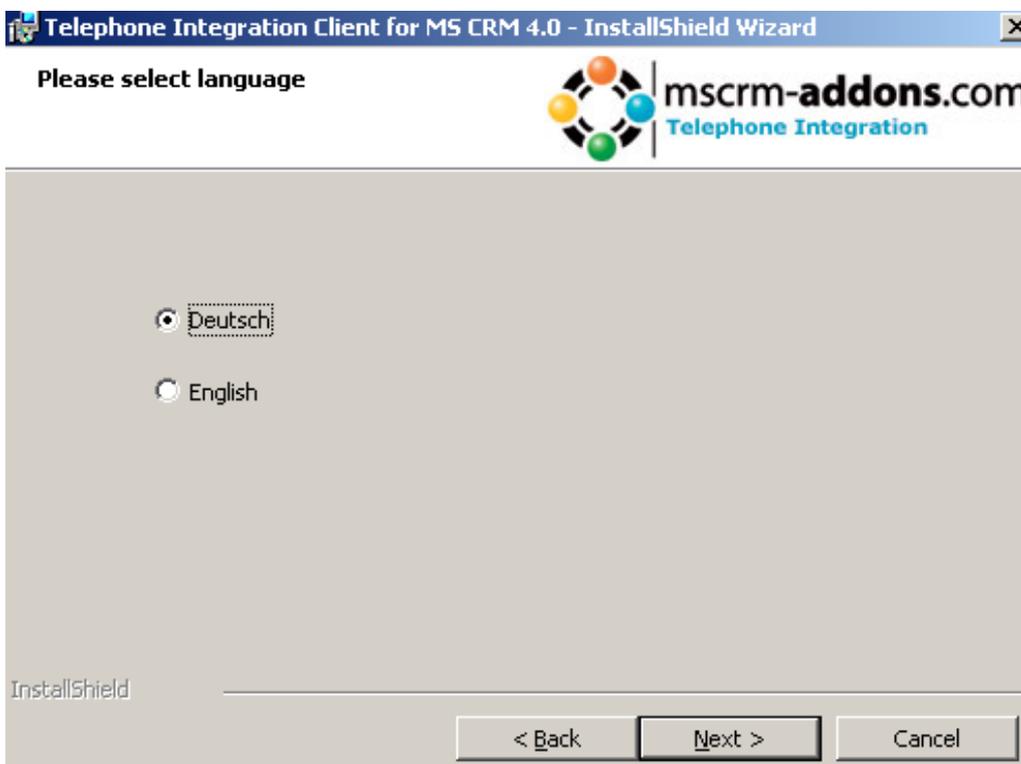
1. You will see following window:



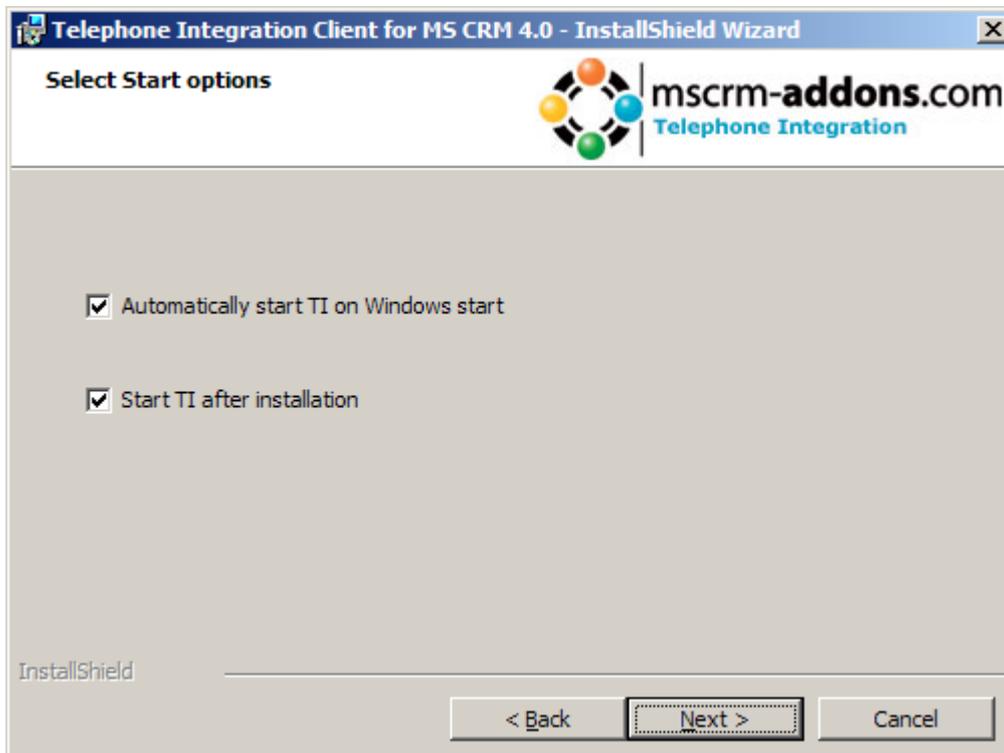
- Now you have to accept the License Agreement.



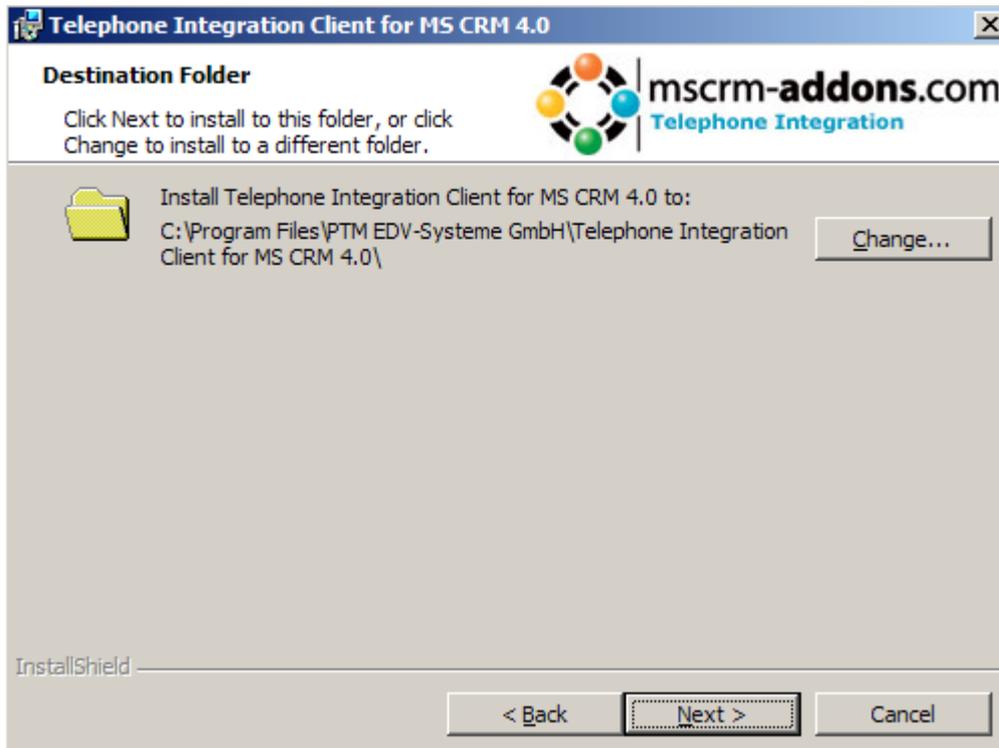
- In the next window you can choose a language.



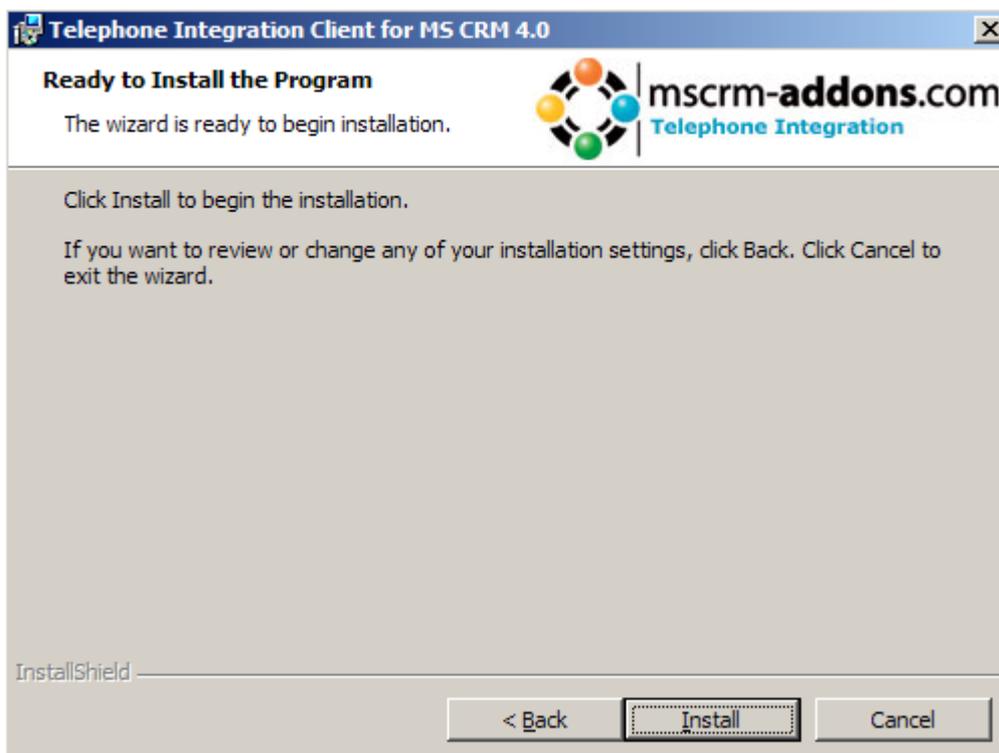
4. Now you have the possibility to select your Start options.



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



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

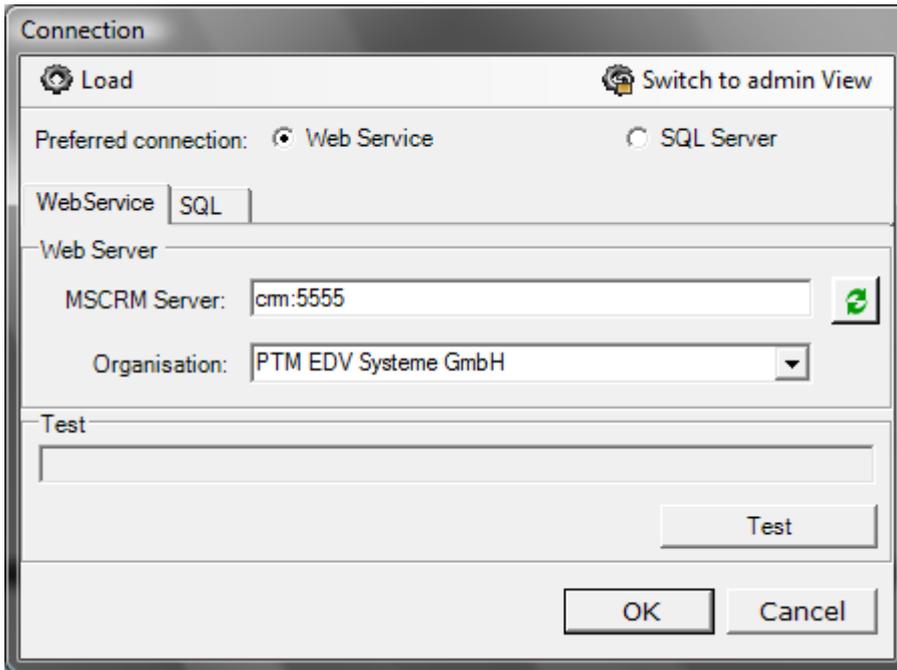


7. Server settings...

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

IMPORTANT: you need to define both, WebService-settings and the SQL-server settings.

8.1. Web Service



The screenshot shows a 'Connection' dialog box with the following elements:

- Buttons: Load, Switch to admin View
- Preferred connection: Web Service, SQL Server
- Tabs: WebService (selected), SQL
- Web Server section:
 - MSCRM Server: (with a refresh icon)
 - Organisation: (with a dropdown arrow)
- Test section: (empty), Test button
- Bottom buttons: OK, Cancel

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 insert the portnumber as well.

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

HTTPS:Should you be connecting via https, switch to the admin view (top right) and check the box to use https.

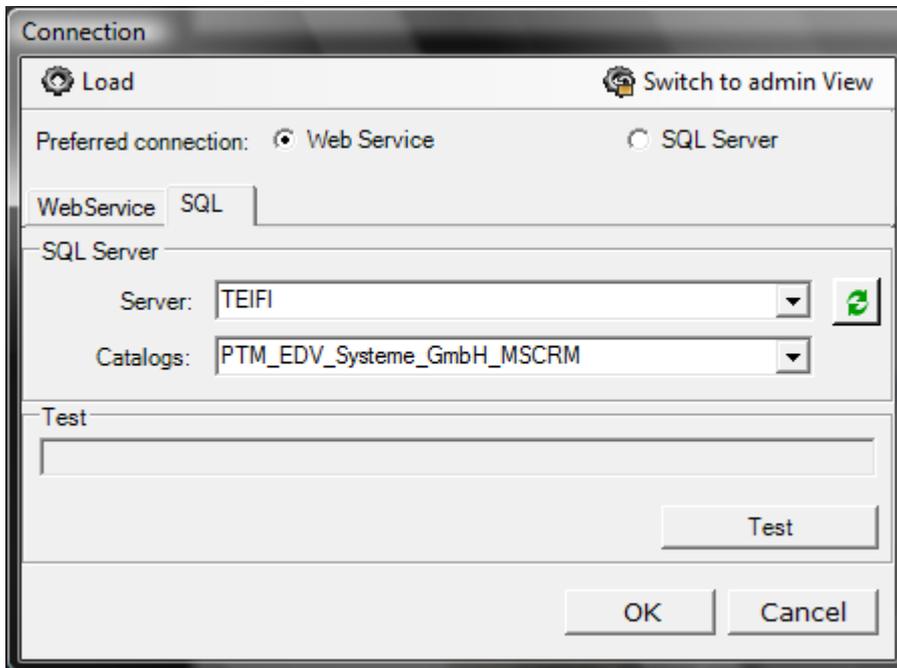
Please note there are 2 separate HTTPS options, one for the discovery service and a separate one for the CRM Server.

A certificate is optional.

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

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

8.2 SQL Server

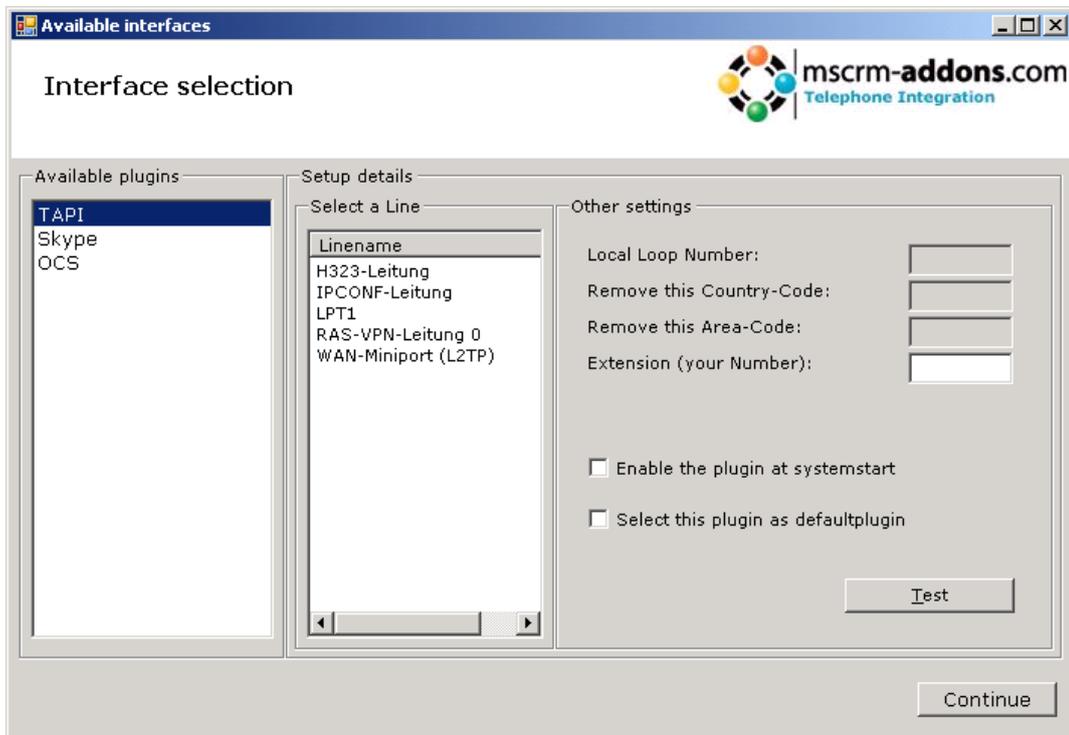


Server: choose the SQL server on which the MSCRM – Database is running.

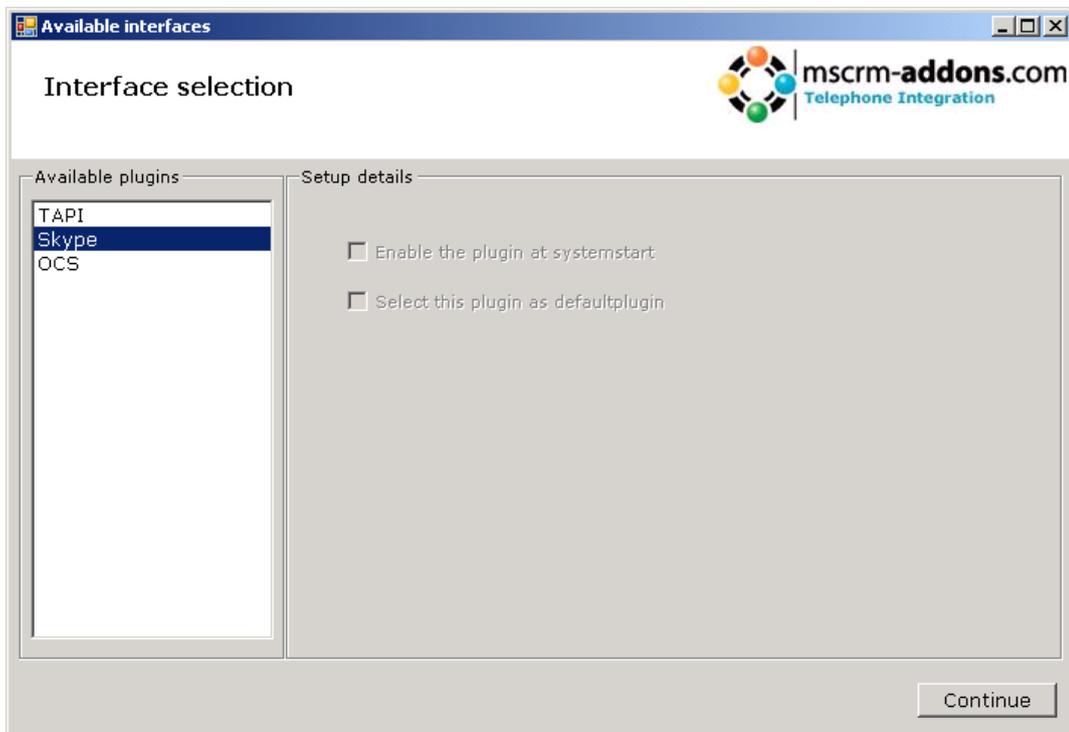
Catalogs: choose the MSCRM-catalogue. E.g PTM_EDV_Systeme_GmbH_MSCRM
Again you've got the possibility to logon with your local credentials (Integrated security) or to supply a specific user. (see 8.1)

If your server is not listed, you can specify the server and catalog name manually as well. IN case of a named instance include the instance name in the server field.

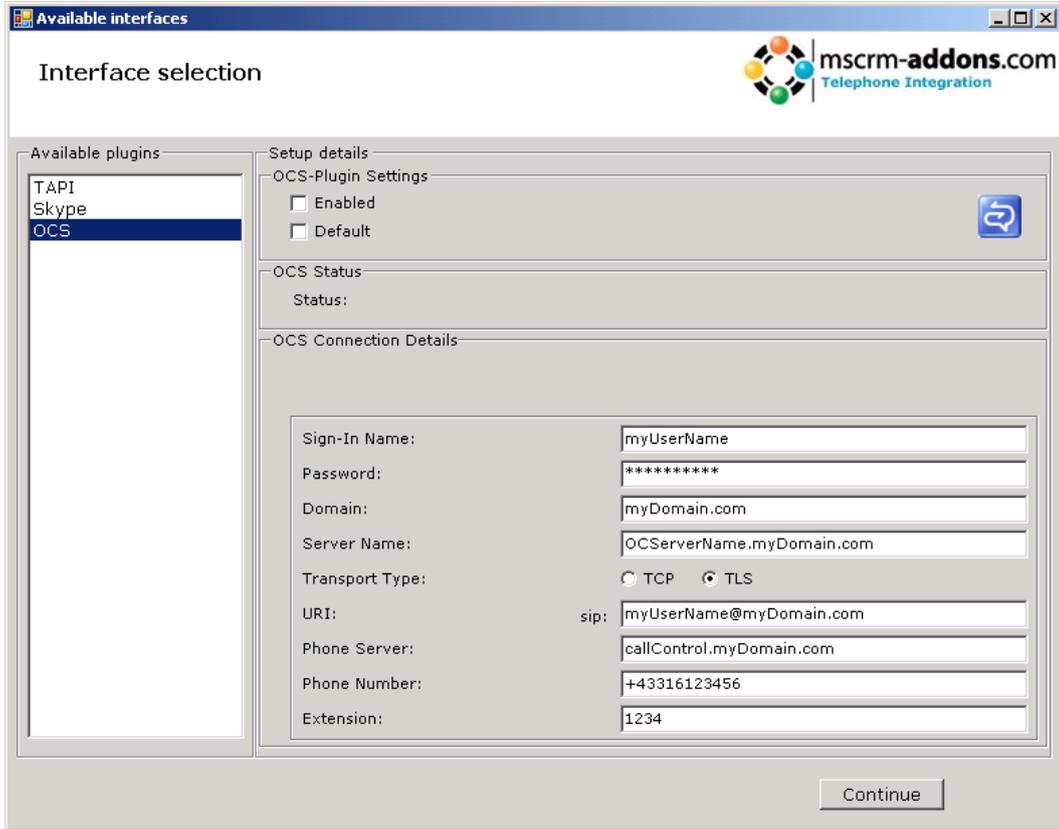
8. TAPI Setup



9. Skype Setup



10. OCS Setup



The screenshot shows a window titled "Available interfaces" with a sub-header "Interface selection". On the left, a list of "Available plugins" includes TAPI, Skype, and OCS (which is selected). On the right, the "Setup details" section is expanded to show "OCS-Plugin Settings" (with "Enabled" and "Default" checkboxes), "OCS Status" (with a "Status:" label), and "OCS Connection Details". The connection details include fields for Sign-In Name (myUserName), Password (masked with asterisks), Domain (myDomain.com), Server Name (OCServerName.myDomain.com), Transport Type (radio buttons for TCP and TLS, with TLS selected), URI (sip: myUserName@myDomain.com), Phone Server (callControl.myDomain.com), Phone Number (+43316123456), and Extension (1234). A "Continue" button is at the bottom right.

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

The login information should be provided as follows:

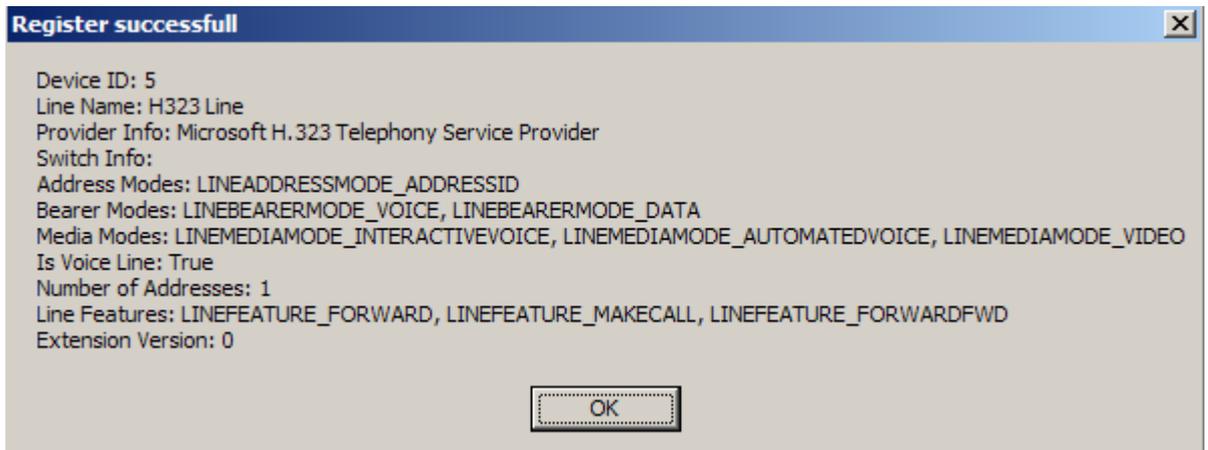
- Sign-Name
 - Regular Active Directory username
- Password
 - Regular Active Directory user password
- Domain
 - The Active Directory domain (e.g. mydomain.com)
- Server Name
 - OCS server name (e.g. ocs.mydomain.com)
- Transport Type
 - Type of connection used by OCS system
- URI
 - The SIP URI for 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)

- Phone Server
 - Telephone control server name (e.g. callcontrol.mydomain.com)
- Phone Number
 - The basic telephone number without extension (e.g. +43316123456)
- Extension
 - The extension of the telephone that should be used to route calls to/from

Select the correct line 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.

11. Set up TI for MS CRM 4

To do further customizations see the users guide for TI for MS CRM 4

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



If you selected "Start TI for MS CRM 4 after installation", TI will start automatically.

2.1 Starting the Client

After a successful Installation you will find a new Menu-entry

PTM EDV-Systeme - Telephone Integration for MS CRM 4 - TI for MS CRM 4

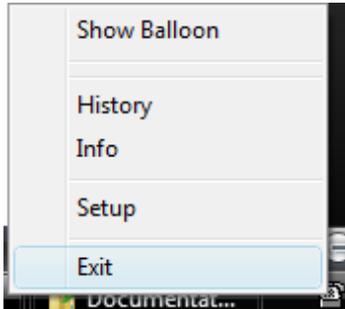
Click on it and TI for MS CRM 4 starts.

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

After a few seconds the red cross appears and TI for MS CRM 4 is ready! 

2.2 Closing the Client

Using the right mouse button, click on the Icon and a menu will appear – click on [Exit].



2.3 Configuration of the clients

After the installation you can always change the Ti setup.

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

To activate the new serverside settings for CallInfo4CRM please restart CallInfo4CRM.

3 Contact

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