TelephoneIntegration Server for Microsoft Dynamics 365

v.1.3, Feb 2018

TelephoneIntegration Server
(How to install TelephoneIntegration Server for Dynamics 365)

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Preamble

This documentation is intended to guide you through the Server installation of TelephoneIntegration Server for Dynamics 365.

TelephoneIntegration Server facilitates – among other things – the handling and organization of phone calls. Please read this document carefully before you start the installation!

Target Audience

This guide is intended for users who want to use TelephoneIntegration for Microsoft Dynamics 365 and have the following minimum skills:

- Maintaining and configuring SQL Server databases
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft Dynamics 365 Server

Supported Web Browsers and versions

Supported Web Browsers:

- Internet Explorer 9 and higher
- Chrome
- Edge
- Firefox

Any one of the following operating systems is required:

- Windows 10
- Windows 8.1 (64-bit and 32-bit versions)
- Windows 8 (64-bit and 32-bit versions)
- Windows 7 (64-bit and 32-bit versions)
- Windows Vista SP2 (6-bit and 32-bit versions)
- Windows Server 2012, Windows Server 2008 R2, or Windows Server 2008 when running as a Remote Desktop Services application.

One of the following versions of Microsoft Dynamics 365 must be available:

- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

The RTM version of Microsoft .NET Framework 4.6.2 is required. Microsoft Dynamics CRM 8.2.0.749 and higher is required.

Windows Identity Foundation

The Windows Identity Foundation will be installed as part of the TelephoneIntegration Server setup.

Purpose of TelephoneIntegration Server?

The purpose of TelephoneIntegration (abbreviation **TI**) Server is to import managed solutions into Microsoft Dynamics 365 which contain custom entities for licensing, tracking, history and enable PowerDialing and the configuration of TelephoneIntegration.

1 How to install TelephoneIntegration for Microsoft Dynamics 365

TelephoneIntegration Server Dynamics 365 can be installed on any supported operating system which is able to connect to your Dynamics 365 Server.

During the installation, you must specify at least one organization in which the TelephoneIntegration Server will be installed. Complete the setup and start the TelephoneIntegration Server Configuration in the Windows Start Menu to install and configure the TelephoneIntegration Server into another Dynamics 365 Organization.

The latest version of TelephoneIntegration Server is available in the Download section of our website. Please log in to our website and navigate to Download. Then, click on the TelephoneIntegration icon.

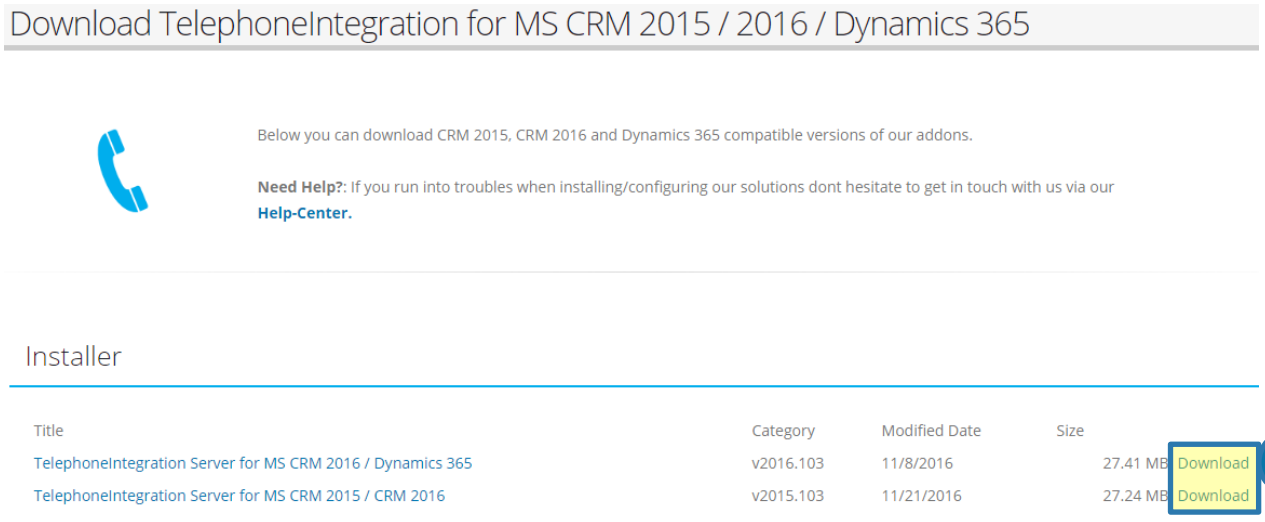


Figure 1: Download TelephoneIntegration for Dynamics 365

Version 2017.104 works with Microsoft Dynamic 365 because it accesses the new CRM DLL library.

Please select the version that suits your requirements and click on the corresponding 1 ***[Download]***-button.

1.1 First steps

Hereafter, the *TelephoneIntegration Server Setup*-window appears.

The name of the Setup file varies, depending on your choice.

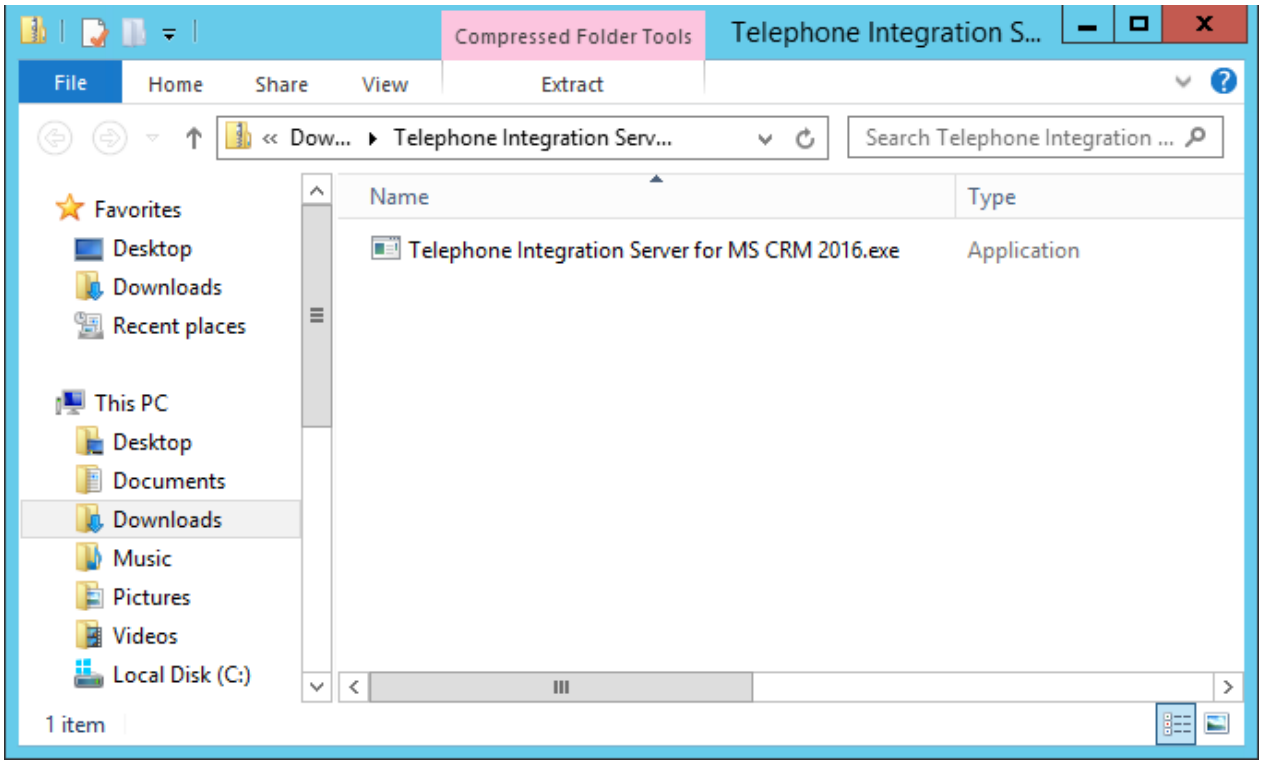


Figure 2: TelephoneIntegration Server Setup file

Now run the TelephoneIntegration Server Setup file.

The TelephoneIntegration Server Installation Wizard appears.

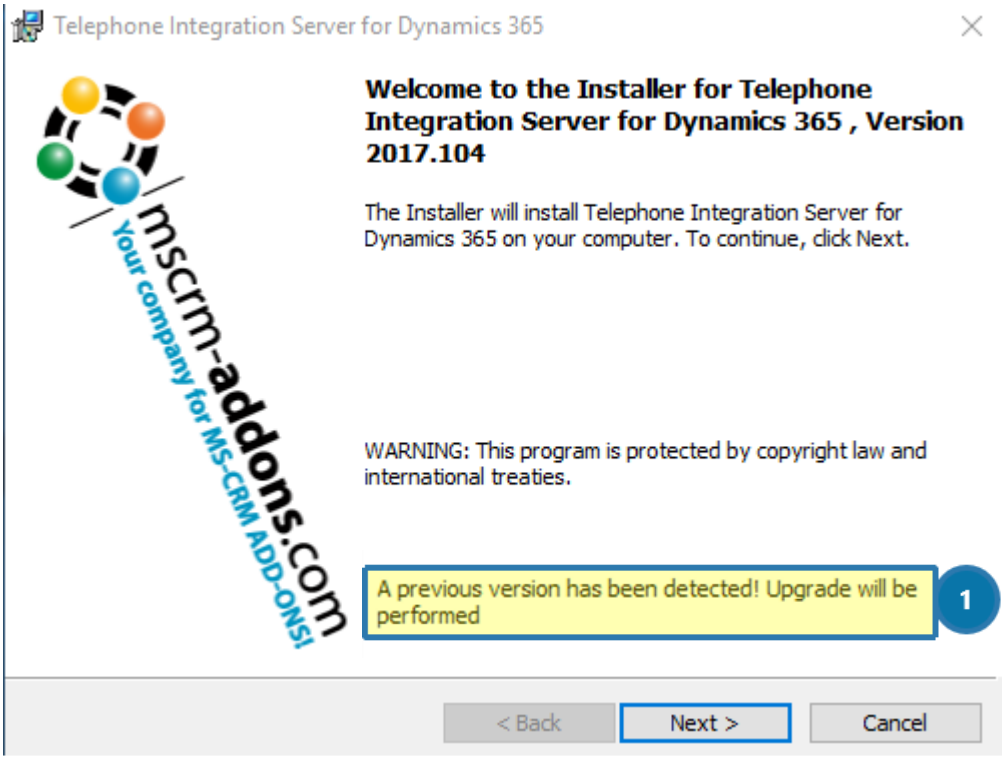


Figure 3: TelephoneIntegration Server Installation Wizard

This message 1 appears only if an upgrade has been detected. The TelephoneIntegration Wizard will automatically update your previous version and the set up will jump to CHAPTER 1.3 INSTALLATION ON PAGE 10 automatically.
If you install TelephoneIntegration Server for the first time, the message does not appear and the installation continues as described in the course of the next chapters.

1.2 The EULA (End User License Agreement)

Please read the license agreement carefully and accept its terms. If you do not accept the license agreement, you cannot proceed with the installation. You may also print the agreement if you want to.
Click on the ***[Next]***-button to continue.

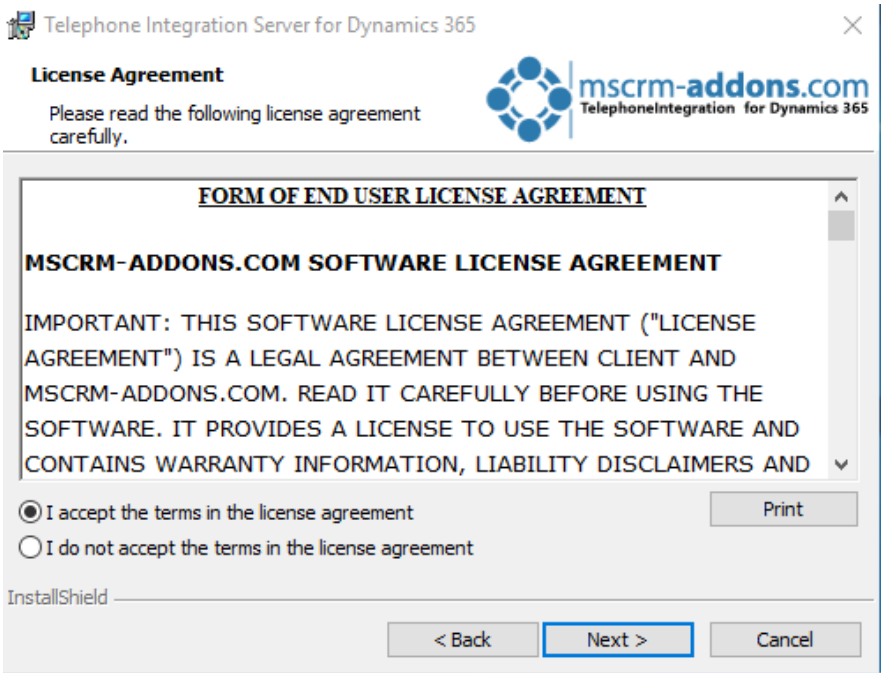


Figure 4: EULA (End User License Agreement)

1.3 Installation

The next window enables you to change the save location of your installation. Please click on the ***[Change…]***-button, if you want to change the save location. If you are fine with it, proceed with a click on the ***[Next]***-button.

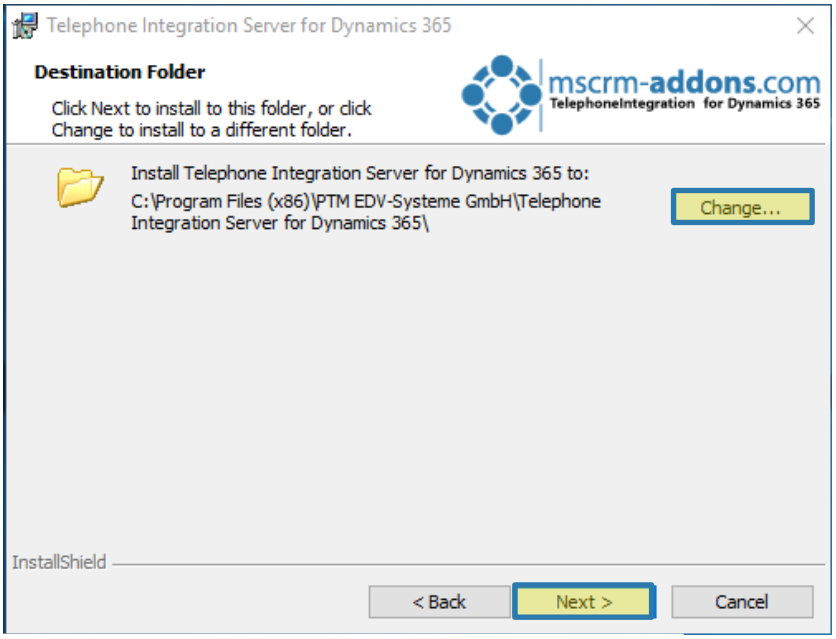


Figure 5: Destination folder selection

In the next window, click on the ***[Install]***-button to start the installation.

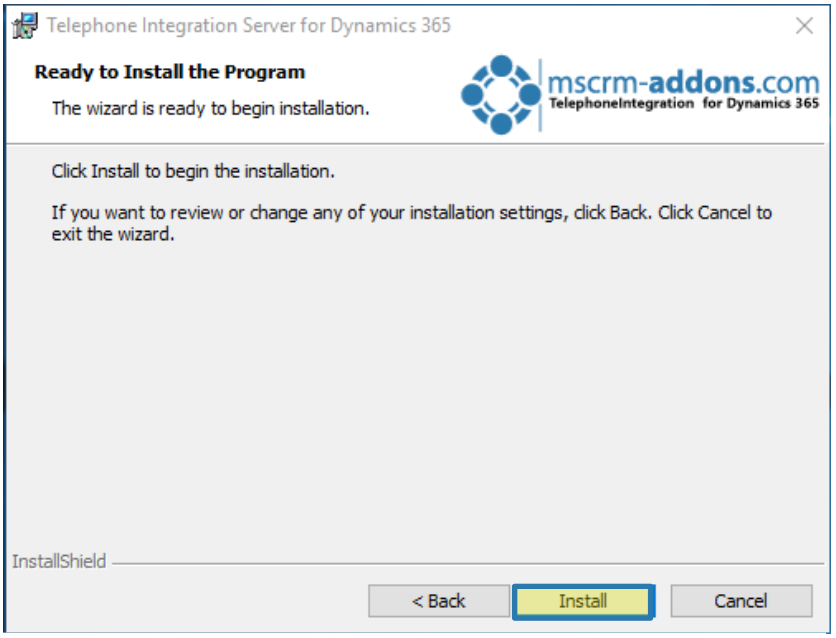


Figure 6: Install the program

Next, the TelephoneIntegration InstallShield Wizard installs TelephoneIntegration.

The installation may take several minutes. Enjoy your coffee!

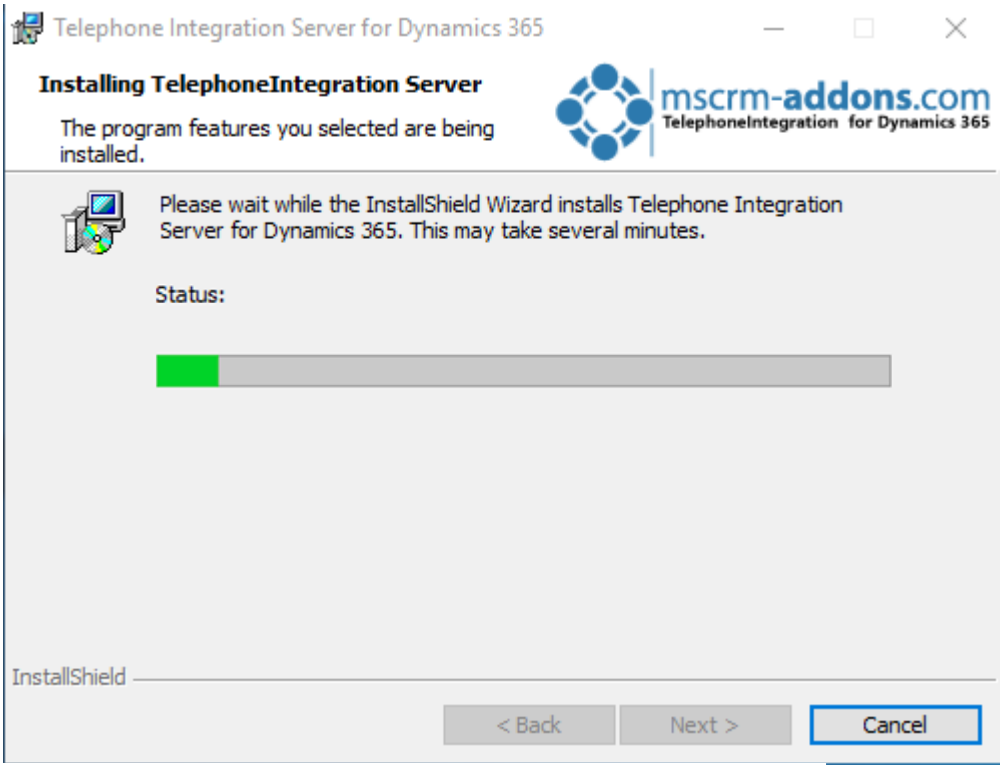


Figure 7: Installing TelephoneIntegration Server

1.4 Dynamics 365 Connection Setup

In the meantime, the Dynamics 365 Connection setup-dialog appears, because TelephoneIntegration Server requires a connection to Dynamics 365.

To configure your Dynamics 365 Server, select an existing profile or create a new one. Select your preferred path and add your login credentials by filling in the field's ❶ username, ❷ password and ❸ domain.

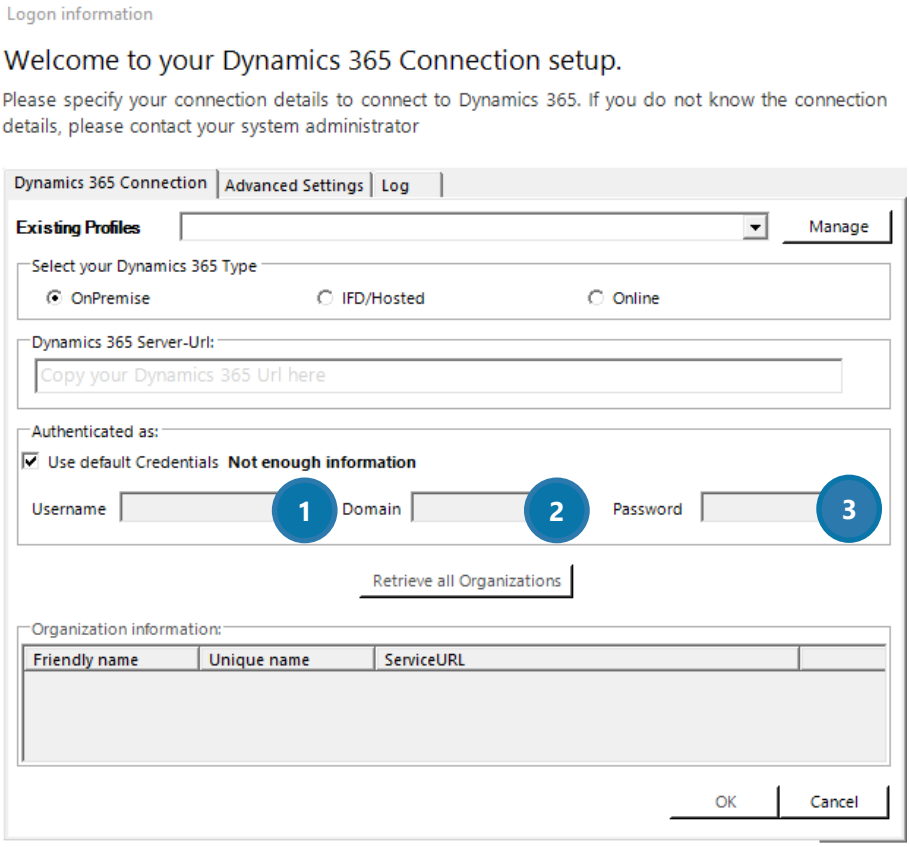


Figure 8: Dynamics Connection setup blank

Next, press the 1 ***[Retrieve all Organizations]***-button and 2 select your organization. As soon as you have inserted all your credentials, press on the 3 ***[OK]***-button to proceed.

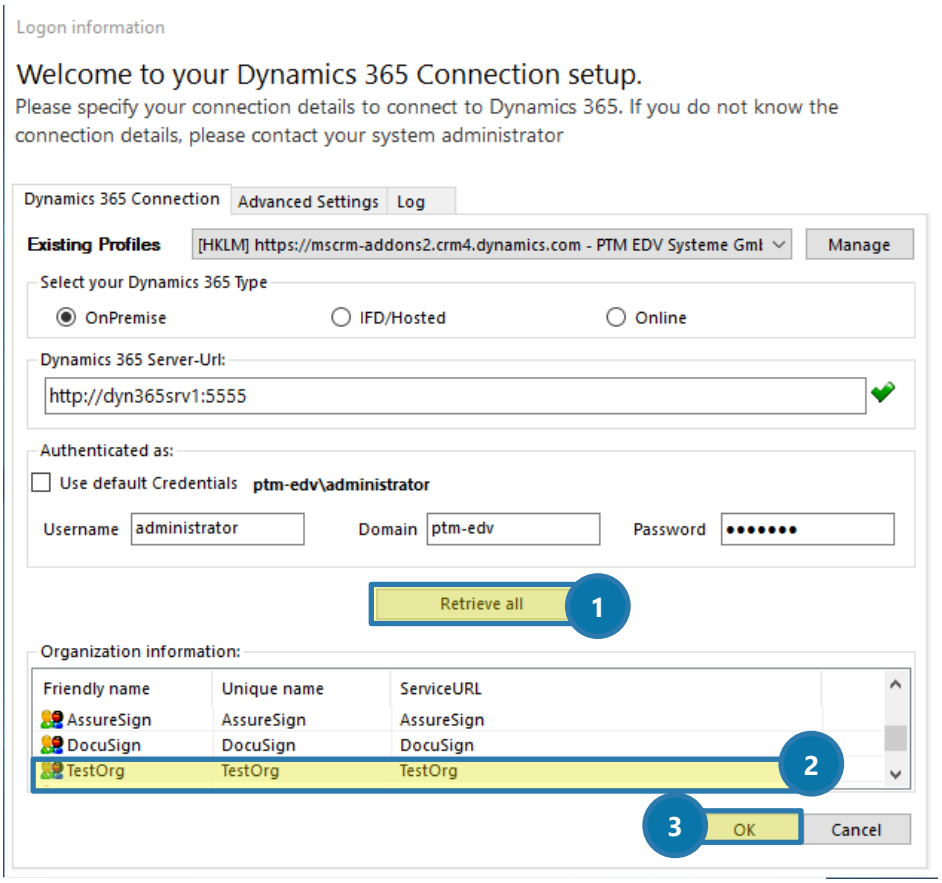


Figure 9: Dynamics 365 Connection setup filled

For further information please have a look at our Connection Dialog documentation on our website.

If you install TelephoneIntegration Server for the first time, you will have to setup the general ribbon integration in the TelephoneIntegration Server Config. Here, you can specify different options regarding the functionalities of TelephoneIntegration Server. Please have a look at CHAPTER 3.2 HOW TO LAUNCH THE CONFIG OF TELEPHONEINTEGRATION SERVER ON PAGE 29 in order to receive further information on this topic.

1.5 Security Roles

During the installation, you will be also asked if you want to install the security roles for all users. The following security role contains the basic requirements for using our products and for being able to perform the license check.

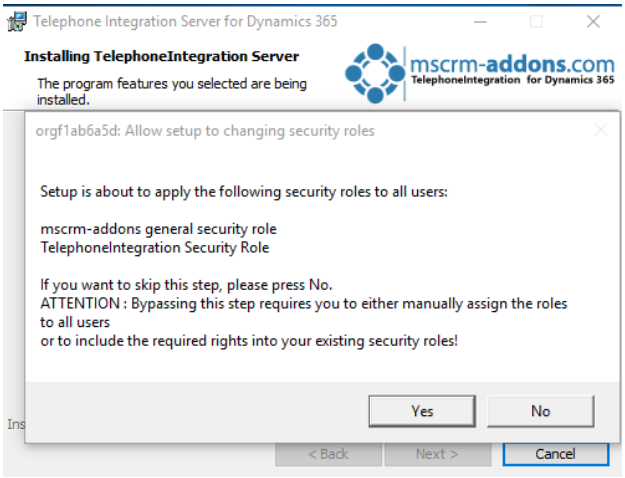


Figure 10: Security roles setup

Please click on the ***[Yes]***-button to apply the security roles to all users. Click on the ***[No]***-button to skip this step.

If you skip this step, you will have to assign the roles manually.

1.6 Complete the installation

If the installation was successful, the following window appears. Please click on the ***[Finish]***-button to complete the installation.

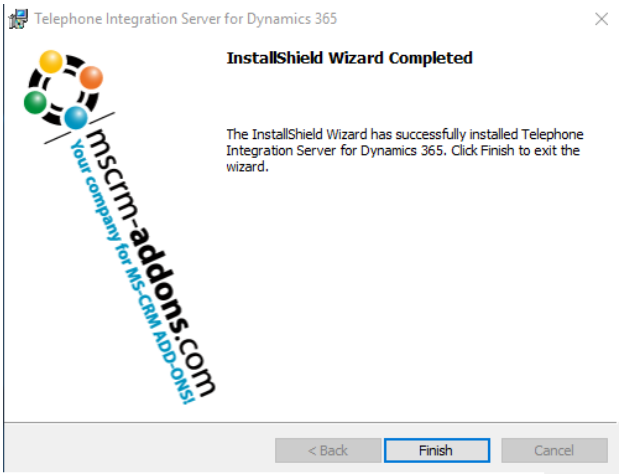


Figure 11: Finish the TelephoneIntegration installation

2 Web Configuration

The Web Configuration is available if you install TelephoneIntegration from Microsoft AppSource or install the TelephoneIntegration Server part. Please notice, that the Web Configuration only works from TelephoneIntegration Version 2017.104.

To open the Web Configuration, please navigate to Settings and select TelephoneIntegration in the MSCRM-ADDONS area.

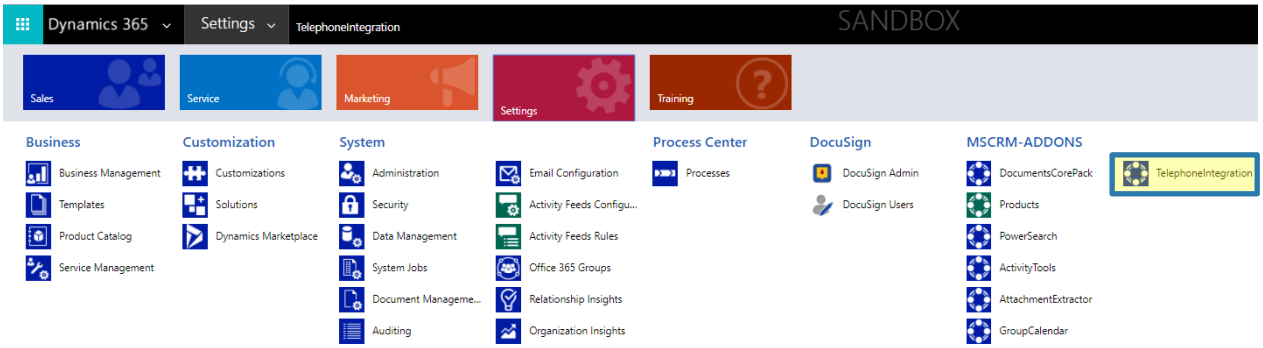


Figure 12: TelephoneIntegration Web Configuration

2.1 Getting Started

You are first provided with the *Getting Started-tab*, which gives you all the important information about TI. Here you can find for example a direct linking to the pricing and documentation library of the product.

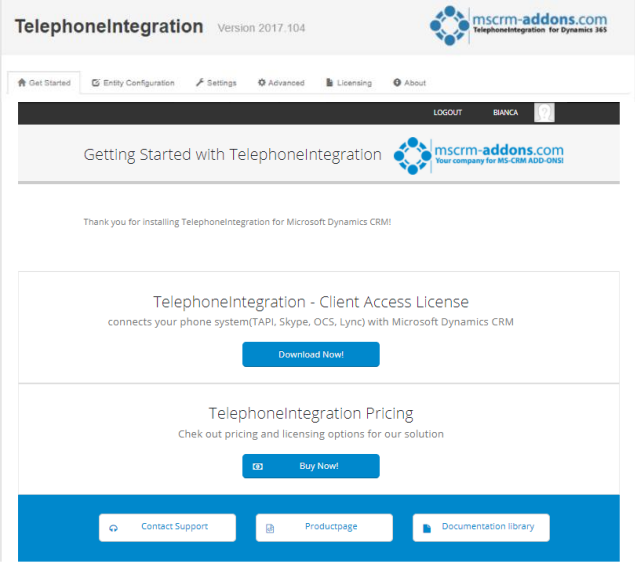


Figure 13: TelephoneIntegration Getting Started

2.2 Entity Configuration

Like the information in the figure below says, this area helps you define which entities and fields should be activated for CTI. It is also possible to configure which fields should be displayed or searched on the balloon. You can also define if the ***[Call]***-button should be shown in your Dynamics 365 menu.

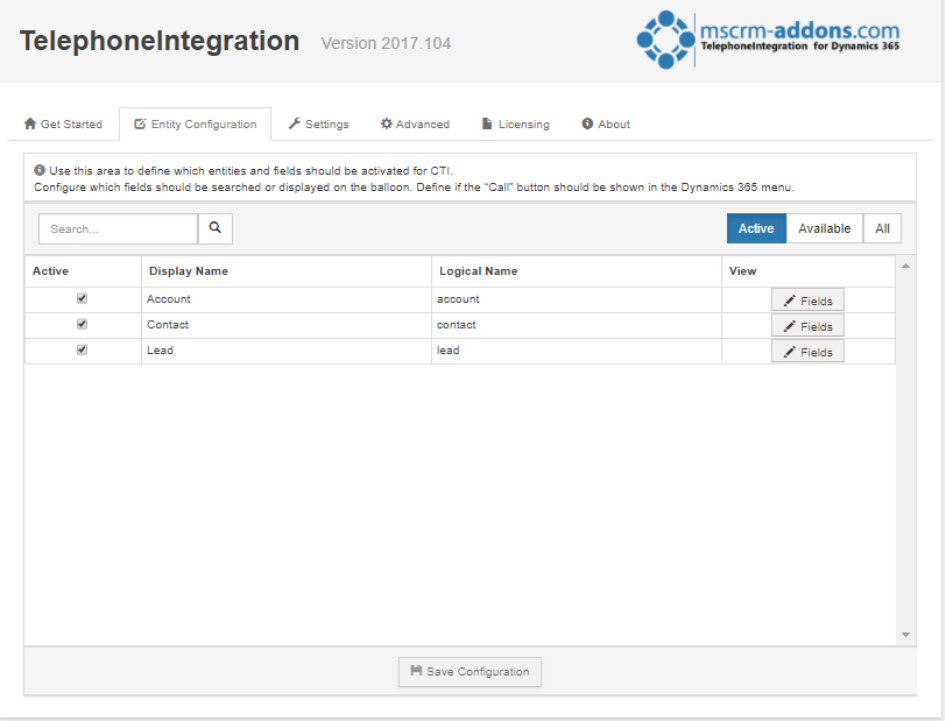


Figure 14: TelephoneIntegration Entity Configuration

2.2.1 Enable Entities

You're able to directly search for any entities you'd like to set to active. Once you enable an entity through the checkbox "Active", the fields dialog will open.

2.2.2 Fields Dialog

Within this dialog, you can specify the details of the entities by checking the corresponding boxes.

Phone: Check the attributes that contain phone numbers and should be used by CTI
Details: Specify the columns that should be shown in the details section of a call
Call Title: Specify one attribute that will be used as the headline of a call

Please have a look at the example in the figure below.

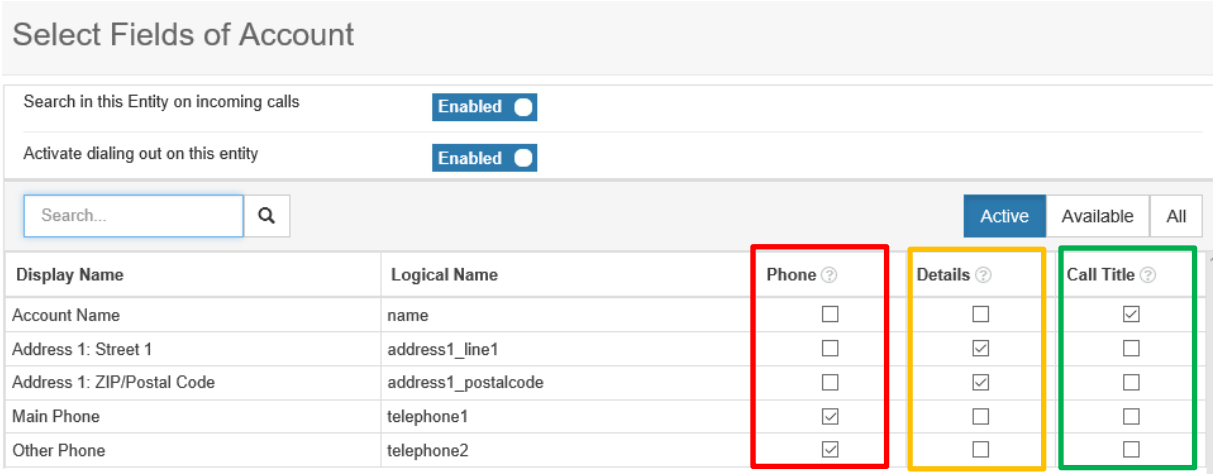


Figure 15: Specify details of the entities

This is the result of the configuration above. This is how your balloon looks like after specifying the details.

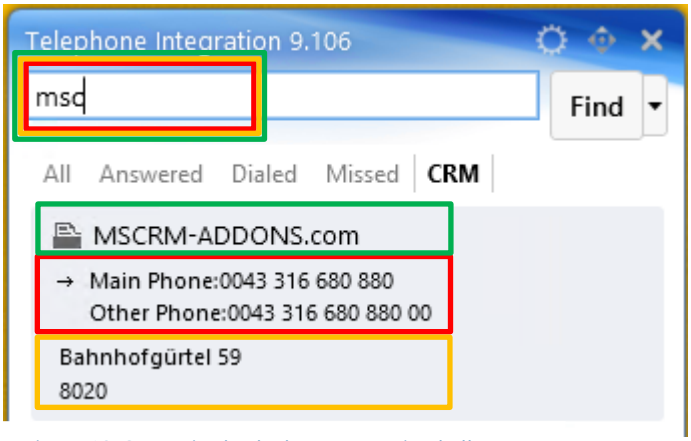


Figure 16: Customized TelephoneIntegration balloon

In this example, the fields you selected are displayed accordingly in the balloon. You have the possibility to search through them. Like you can see below, you can search for:

Call Title: Account Name
Phone fields: Main Phone & Other Phone
Detail fields: Address 1: Street 1, Address 1: ZIP/Postal Code

If you're done, simply click the ***[OK]***-button and the dialog will be closed.

2.2.3 Change Entities

If needed, you can change the details of the entity by simply clicking the 1 ***[Fields]***-button. This will open the fields dialog again, where you can take your changes.

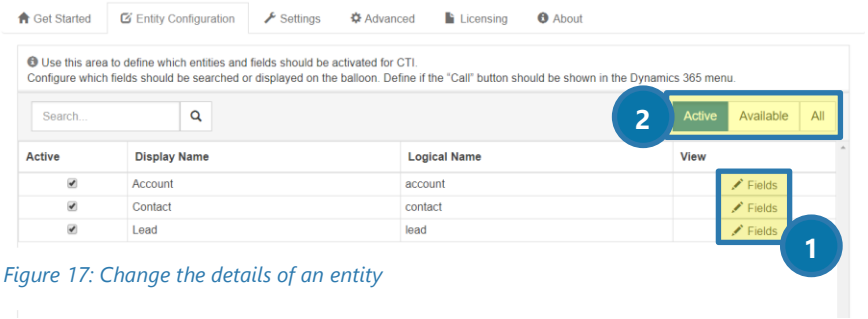


Figure 17: Change the details of an entity

2.2.4 Filter Entities

You have the possibility 2 to filter your entities as explained below.

Active: Your active entities which contain configured fields
Available: The entities which are eligible to be activated/configured
All: Both - active and available entities are listed here

2.2.5 Save Entities

Clicking the ***[Save Configuration]***-button will save all the recently configured entities. After saving your configuration, it is recommended to index the phone numbers of the recently selected number's. The following notification will show up, guiding you directly to the Index Phone Number Dialog.

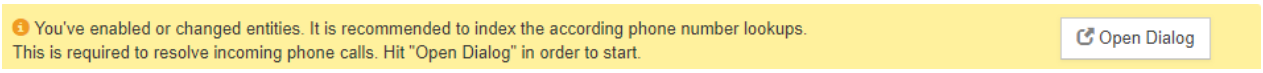


Figure 18: Open Dialog to index phone number

2.2.6 Disable Entities

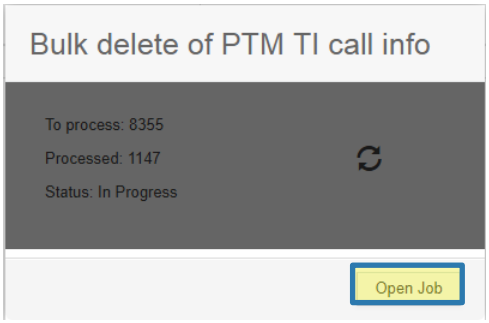


Figure 19: Bulk delete of PTM TI call info

Whenever you disable an entity and save the configuration, this small dialog will pop-up displaying the status of the ongoing Bulk delete of your PTM TI call info. This process deletes the normalized numbers of the de-selected entity automatically, to prevent TI searching through already disabled entities. With the click on the ***[Open Job]***-button you're able to open the bulk delete form in Dynamics 365.

2.3 Settings

In this tab, you can configure the basic but also the general settings of TelephoneIntegration.

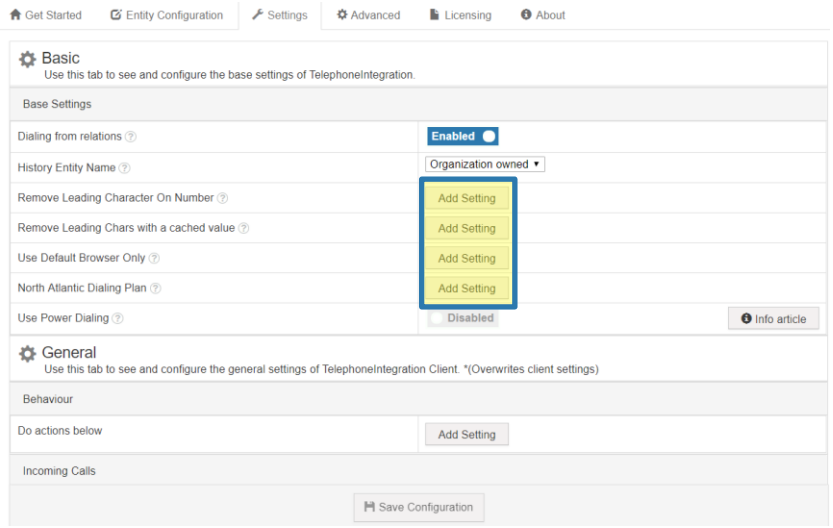


Figure 20: TI Settings

Whenever you want to configure a setting, simply click on the ***[Add Setting]***-button, like you can see highlighted in yellow in the figure above and define a value.

2.3.1 Client Settings

The options from **General** upwards marked with ❶ ***(Overwrites client settings)** are client-based settings which will be used globally for every client when added. Therefore, all configured/added settings will be prioritized over the personal Client TelephoneIntegration Settings.

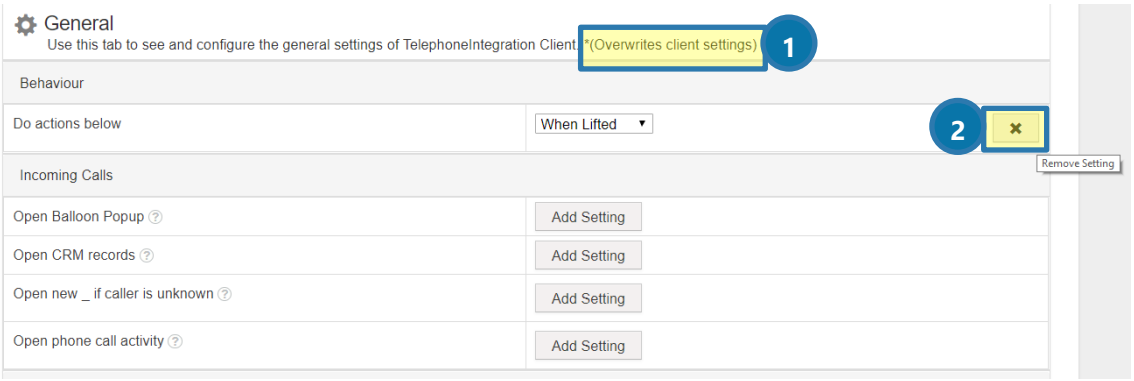


Figure 21: Personal Client TI Settings

2.3.2 Removing Settings

With a click on the ❷ ***[X]***-button the setting will be flagged as to be removed, upon saving the configuration. Afterwards, the client´s configuration will take effect once more of the deleted setting.

2.3.3 Use Power Dialing

Please make sure to install the separate solution Power Dialing. For that, you have to change Use Power Dialing option from 1 Disabled to Enabled. But please notice, that this will only enable the option but will not install the required solution. More information can be found in 2 this Info article.

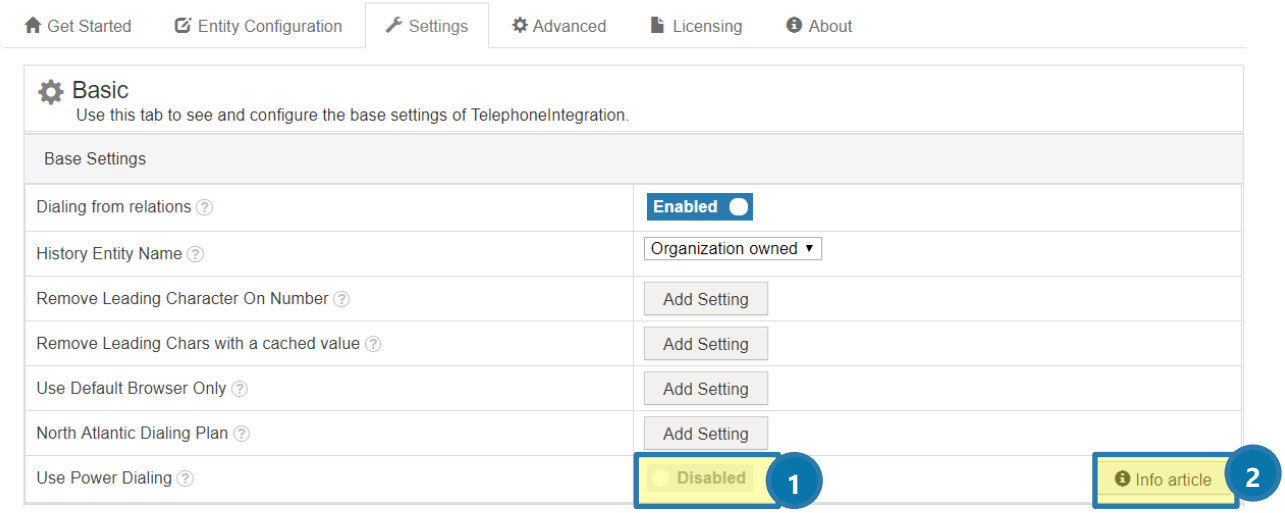


Figure 22: Use Power Dialing

2.4 Advanced Settings

This tab focuses on the advanced functionalities of the TelephoneIntegration Configuration. Use it to **view the fields XML** (mainly for support purposes) or to **index your phone number lookups** and to **prepare for an uninstall**.

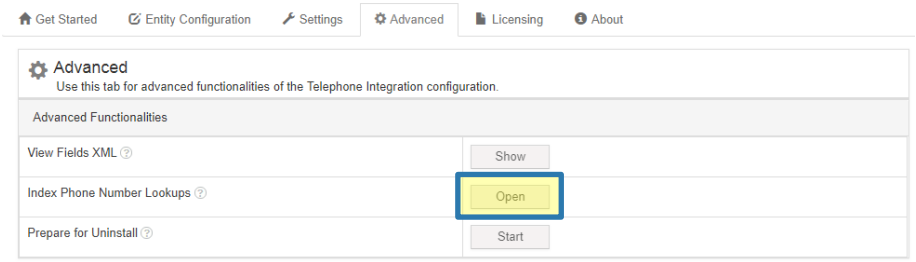


Figure 23: Advanced TI Settings

2.4.1 Index Phone Number Lookups Dialog

To index your phone numbers, simply select the ***[Open]***-button, highlighted in yellow in the figure above. The recently added entities will be selected automatically upon opening this dialog, but you're free to select any entities of your choice.

You can also index the phone numbers right after saving the configuration of your entities by clicking on the ***[Open Dialog]***-button, as mentioned in CHAPTER 2.2.5 SAVE ENTITIES ON PAGE 19.

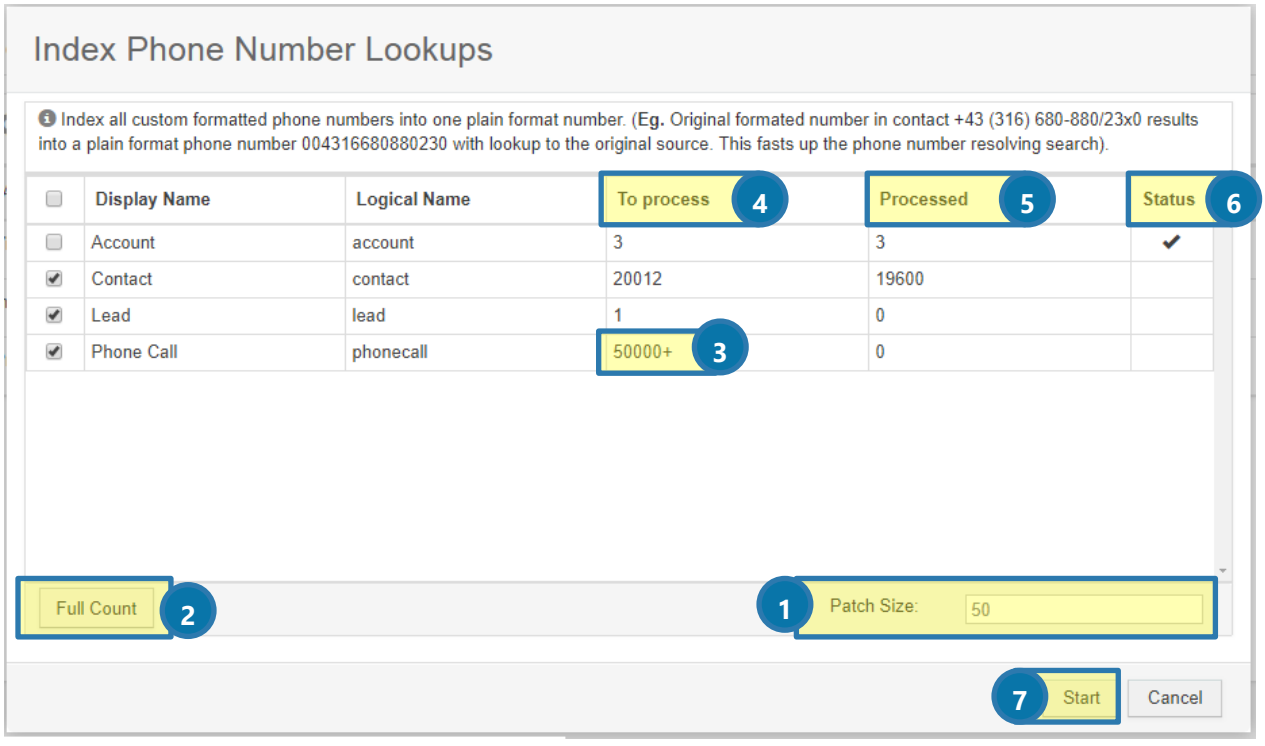


Figure 24: Index Phone Number Lookups Dialog

1 Patch Size

Define how many fields should be sent with one request, the standard is 50.

2 Full Count

Click on this button to display the full count of an entity if the count shows 3 50000+. This might take a while – the yellow information bar will disappear after the process is finished.

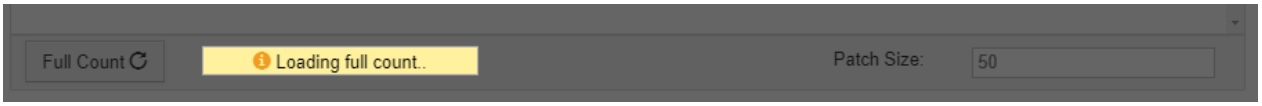


Figure 25: Loading full count

4 To Process

Displays how many fields still need to be formatted/processed.

5 Processed

Displays how many fields are already formatted/processed.

6 Status

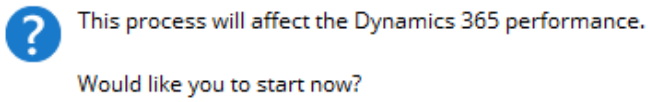
Displays status of whole entity index process:

↻ = Process is currently running

✔ = Process is finished

7 Start

After clicking on the ***[Start]***-button the config asks for confirmation:



Whenever confirmed, the config will start to index all custom formatted phone numbers into one plain format number.

For example:

The original formatted number in contact +43 (316) 680-880/23x0 results into a plain format phone number 004316680880230 with a lookup to the original source. This fasts up the phone number resolving search. (As TelephoneIntegration Client will need to find the telephone number of an incoming call in Dynamics 365).

During this process, the following information will appear. Please follow the instructions displayed accordingly.

Figure 26: Process information

2.5 Licensing

The *Licensing-tab* provides you with all the information regarding your license like you can see in the figure below. To read more about licensing please click on this link. It will direct you to the licensing guide.

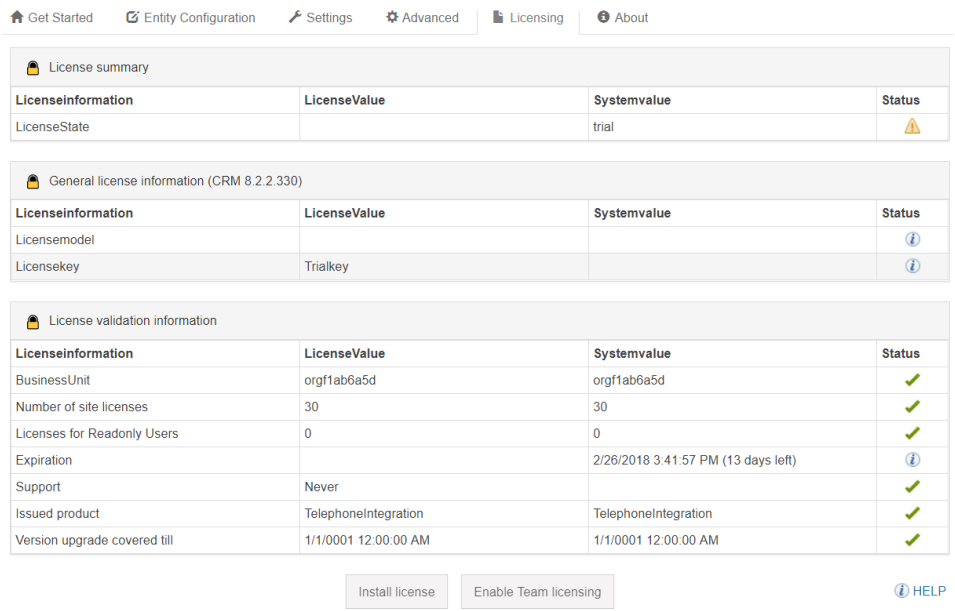


Figure 27: TI License Information

2.6 About

This tab provides you with information about your currently installed version and copyright like you can see below.

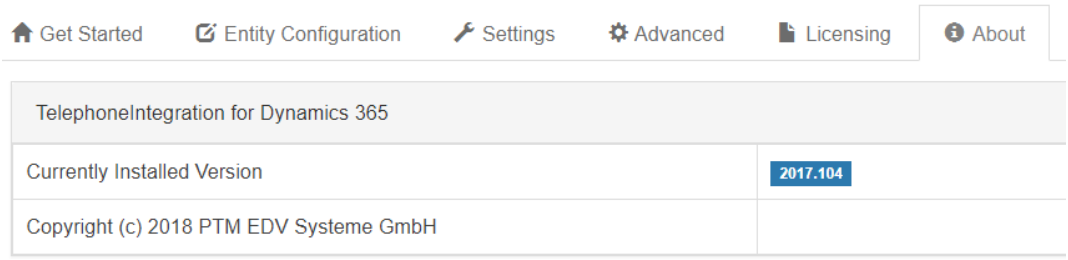


Figure 28: The About tab

2.7 TelephoneIntegration Desktop Server Config Limitations

There are config limitations you have to consider whenever you click on the ***[Launch config]***-button inside the Organization Overview:

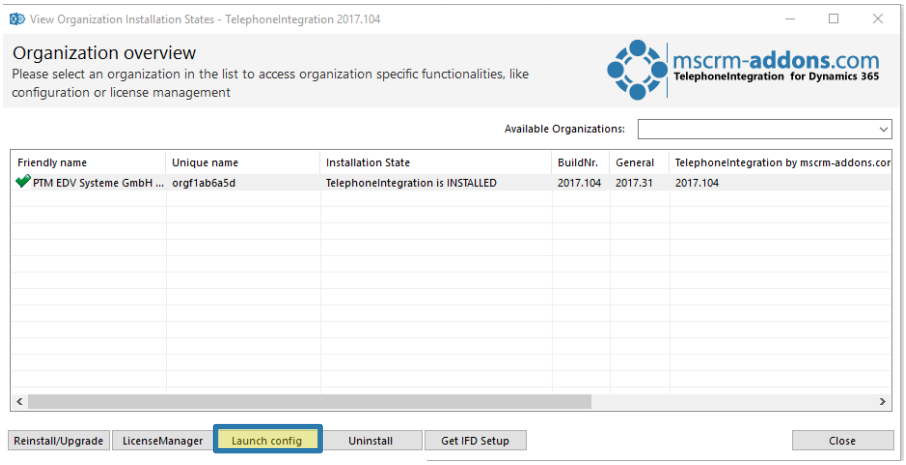


Figure 29: TI Desktop – Launch config

While using the web-based configuration, a warning window will inform you about the limitations, like you can see below. Please click on ***[OK]***-button to continue.

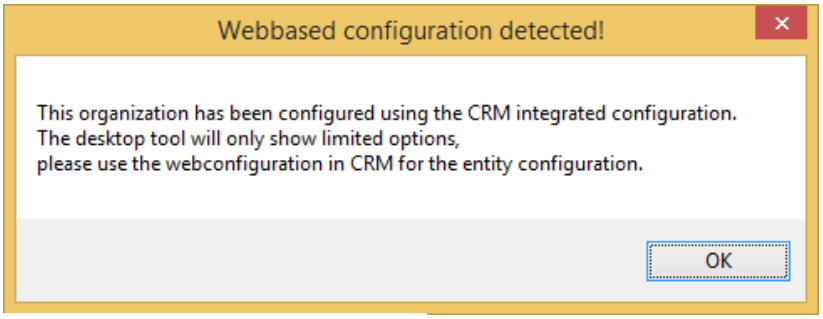


Figure 30: Webbased configuration

After clicking the ***[OK]***-button, the Server configuration will open providing only the two tabs highlighted below. The rest of the settings can only be configured through the web-based configuration.

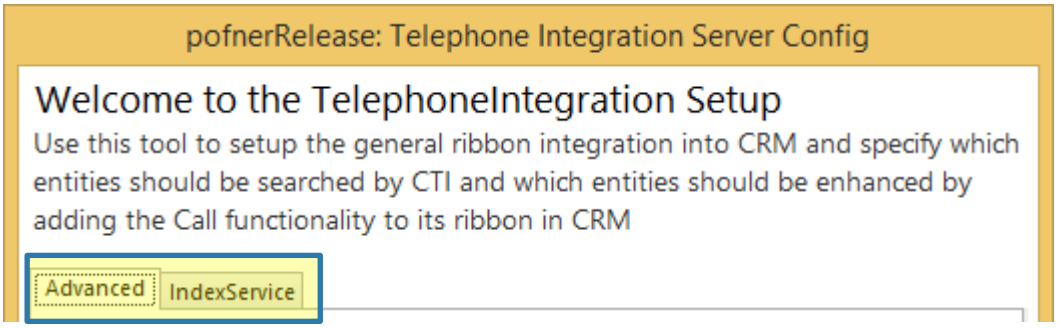


Figure 31: TI Desktop Server Config

3 The TelephoneIntegration Desktop Configuration

The TelephoneIntegration for Dynamics 365 Configuration allows you to select the entities that are used by the TelephoneIntegration Client to search for numbers on incoming calls and to activate the dial-out option.

To work with the TelephoneIntegration Organization Overview, go to the Windows Start Pane and search for *Configuration – TelephoneIntegration Server for Dynamics 365* and press enter.

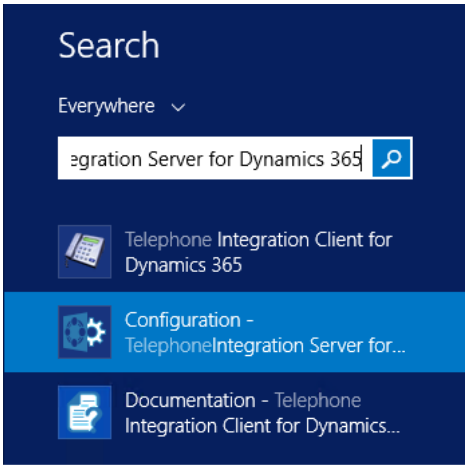


Figure 32: Finish the TelephoneIntegration installation

This action provokes the appearance of the Connection Dialog. For further information on the Connection Dialog, have a look at CHAPTER 1.4 DYNAMICS 365 CONNECTION SETUP ON PAGE 12.

Usually, you will simply have to click on the ***[OK]***-button, because the appropriate organization has already been selected by the system. Anyway, there is nothing wrong with double-checking the data.

Next, the Organization overview appears. Please select your organization here.

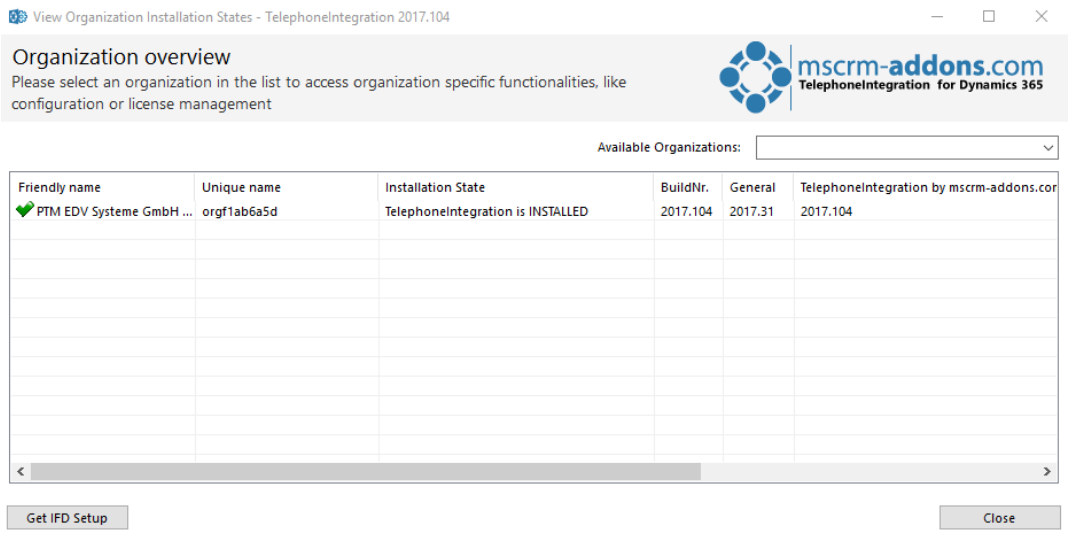


Figure 33: Organization overview

As soon as you have selected your organization in the list, some specific function buttons appear at the bottom of the window. By using these buttons, the organization can be configurated.

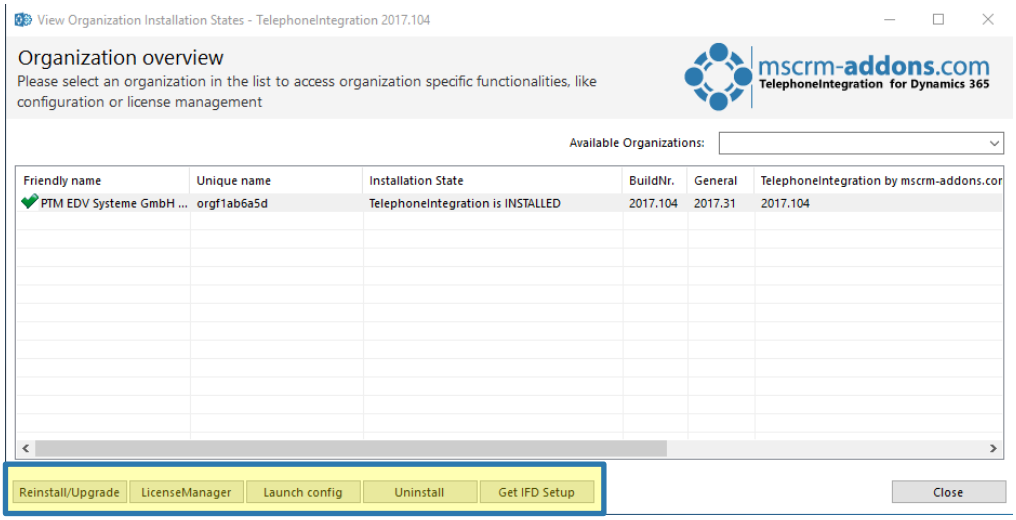


Figure 34: License Manager with specific buttons

3.1 How to reinstall/upgrade TelephoneIntegration Server

Please click on the ***[Reinstall/Upgrade]***-button to reinstall/upgrade TelephoneIntegration Server.

3.2 How to launch the config of TelephoneIntegration Server

If the TelephoneIntegration Server Config-window is not opened automatically (as for example during the very first installation of TelephoneIntegration Server), it can be opened via the License Manager as well.

To do so, simply click on the ***[Launch Config]***-button in the License Manager.

The TelephoneIntegration Server Config-window appears. Please find a brief explanation of the main tabs during the next chapters.

3.2.1 Crm Ribbon

The *Crm Ribbon–tab* enables you to set up the general ribbon integration.

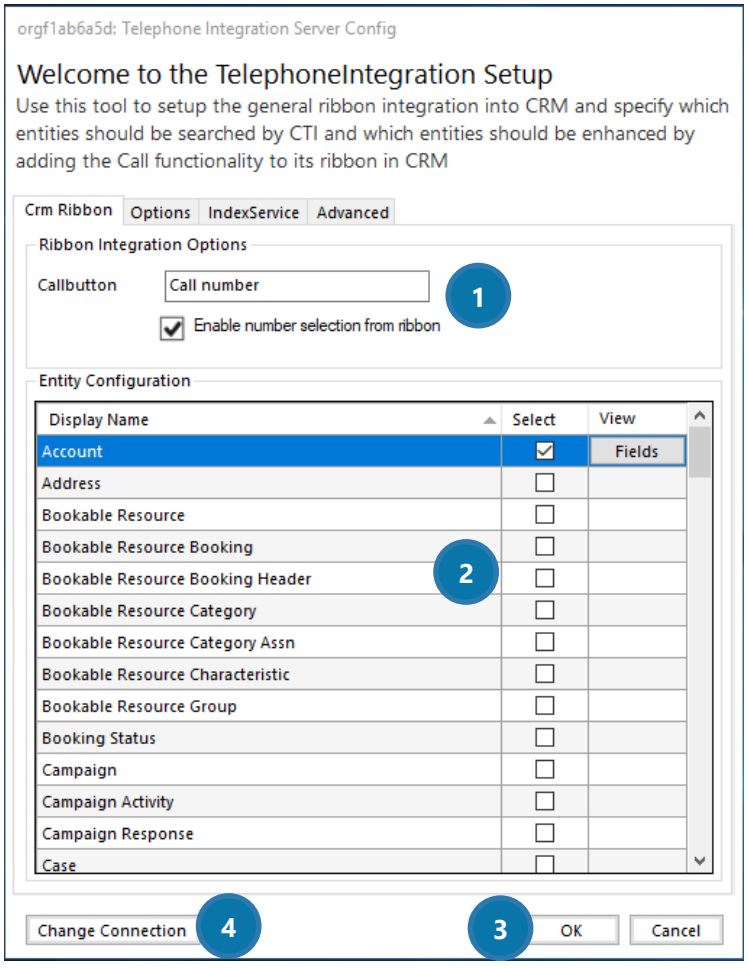


Figure 35: TelephoneIntegration Server Config-window

1 Ribbon Integration Options

CallButton

Here, you have the possibility to give the button you would like to configure a pretty name.

Enable number selection from ribbon here

Please check this box if you would like to enable the number selection for this button directly out of the ribbon.

2 Entity Configuration

Please specify the details on how certain entities should be treated here. To do so, click on the entity you would like to customize. Next, the *Fields*-window opens.

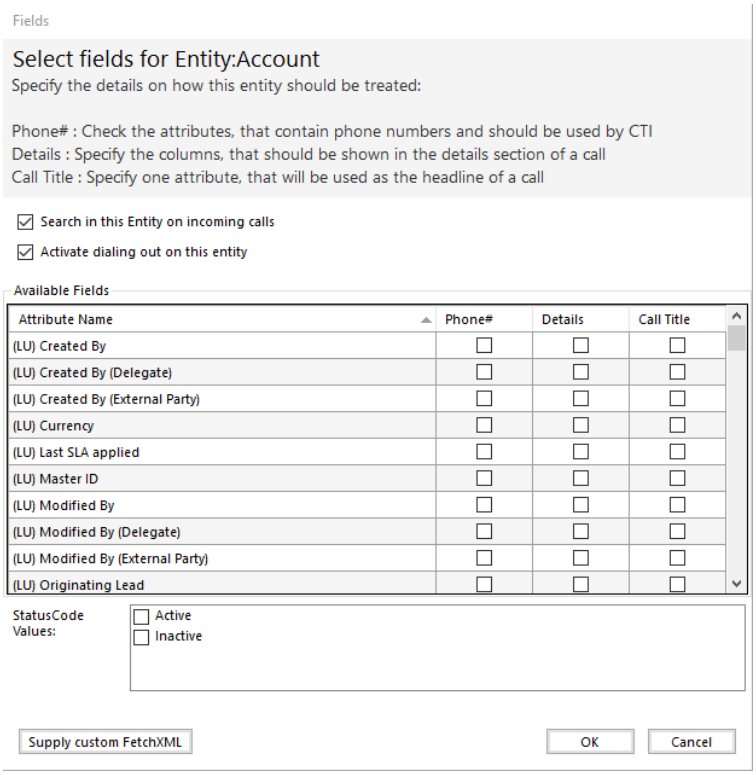


Figure 36: The Fields-tab

Within this window you can specify the details on the entities by checking the corresponding boxes:

#Phone

Check the attributes, that contain phone numbers and should be used by CTI

Details

Specify the columns, that should be shown in the details section of a call

Call Title

Specify one attribute, that will be used as the headline of a call.

STATUSCODE VALUES

This filter can be applied to set the status on active or inactive.

3 THE [OK]-BUTTON

Click on the ***[OK]***-button to save your settings.

4 THE [CHANGE CONNECTION]-BUTTON

Click on the ***[Change Connection]***-button to save your change your connection in the Connection dialog. For more information on the Connection dialog, please have a look at our Connection Dialog documentation on our website.

3.2.2 Options

The *Options-tab* enables you to set up the advanced settings of the general ribbon integration.

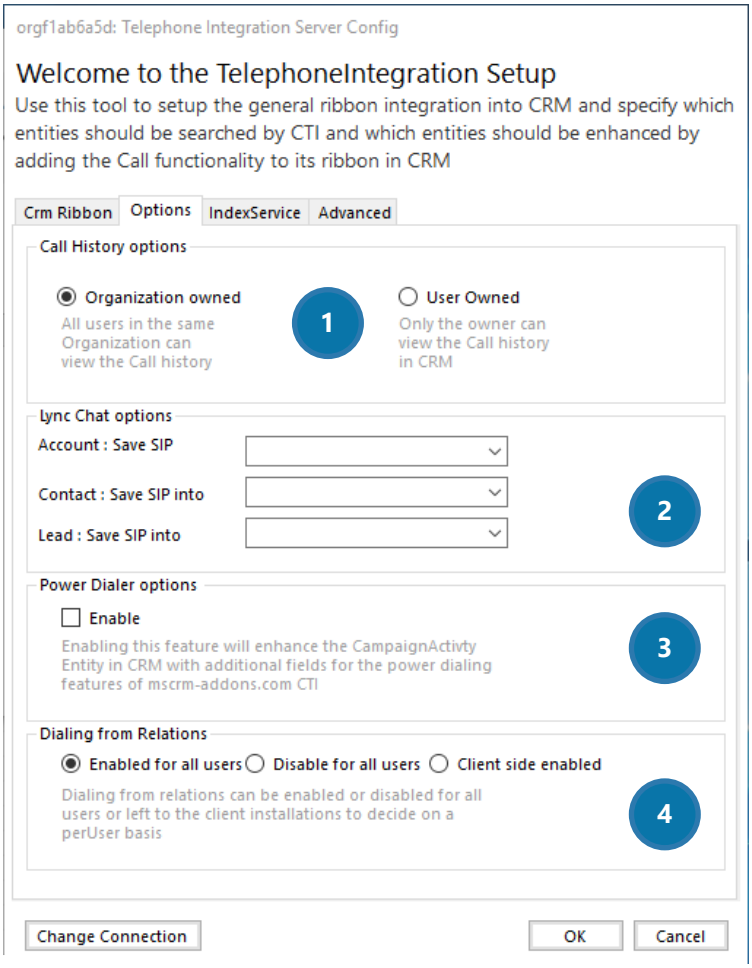


Figure 37: The Options-tab

❶ Call History options

Organization owned

Check this option if you want all users to be able to view the call history in the same organization.

User Owned

Check this option if you want only the user owned to be able to view the call history.

❷ Lync Chat Options

Set up the save locations for the Lync Account, Contact or Lead contacts here.

❸ PowerDialer options

Check this box if you want to enhance the power dialing functionality based on the campaigns or custom phone lists.

❹ Dialing from Relations

Dialing from relations can be enabled or disabled for all users. Another option is to leave the decision to the users themselves. So, users could decide in the TelephoneIntegration Client version per user if they want to enable this functionality or not.

3.2.3 IndexService

The *IndexService-tab* provides you with the possibility to restart your index like you can see in the figure below. The phone index service accumulates all stored formatted phone numbers from their original entities and puts them into the index table. The entity "MSCRM-ADDONS.com CTI CallInfo" serves as the index table.

For instance, if the Contact´s mobile phone number is stored as (xxx) yyy-zzz, then the phone index service will store it as xxxyyyzzz in the index table called MSCRM-ADDONS.com CTI CallInfos.

Its purpose lies in faster number recognition due to the fact that usually the phone numbers are passed in a non-formatted way. The addon will compare the caller/caller phone number with the number in the index table that contains the pointer to the original entity record which holds the formatted caller/caller phone number.

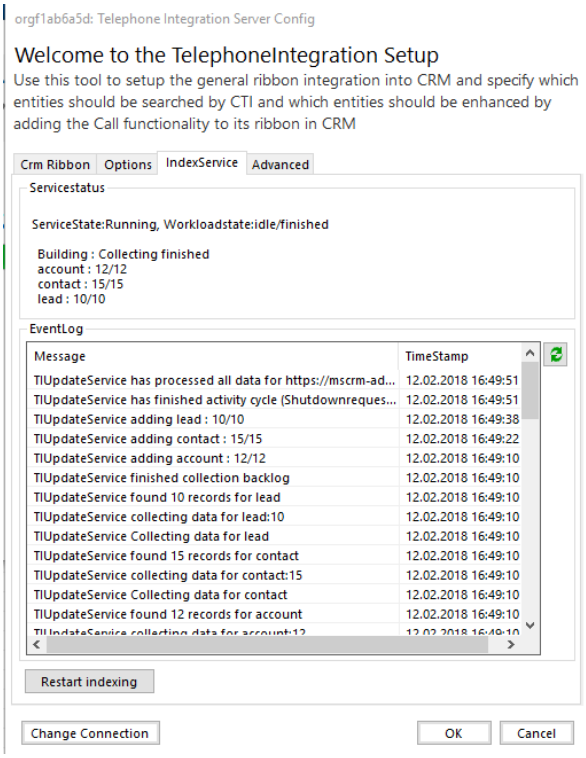


Figure 38: The IndexService-tab

Click on the ***[Restart indexing]***-button to rebuild the index of your Dynamics 365 database.

We recommend you not to rebuild your index during the business hours because it is a long-running process that depends on the size of your database. The bigger the database, the longer the duration of the process.

3.2.4 Advanced

The *Advanced-tab* provides you with the possibility to either delete the generated index records or to customize the index process.

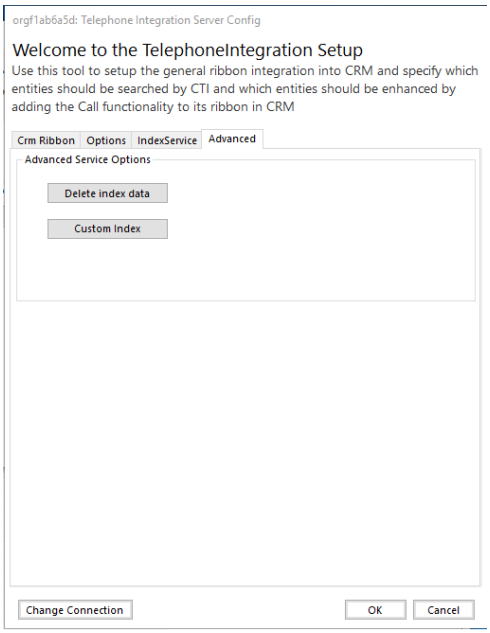


Figure 39: The Advanced-tab

Delete index data deletes all existing "MSCRM-ADDONS.com CTI Call Infos" records.
Customize Index open the CTI Update Service Configuration dialog.

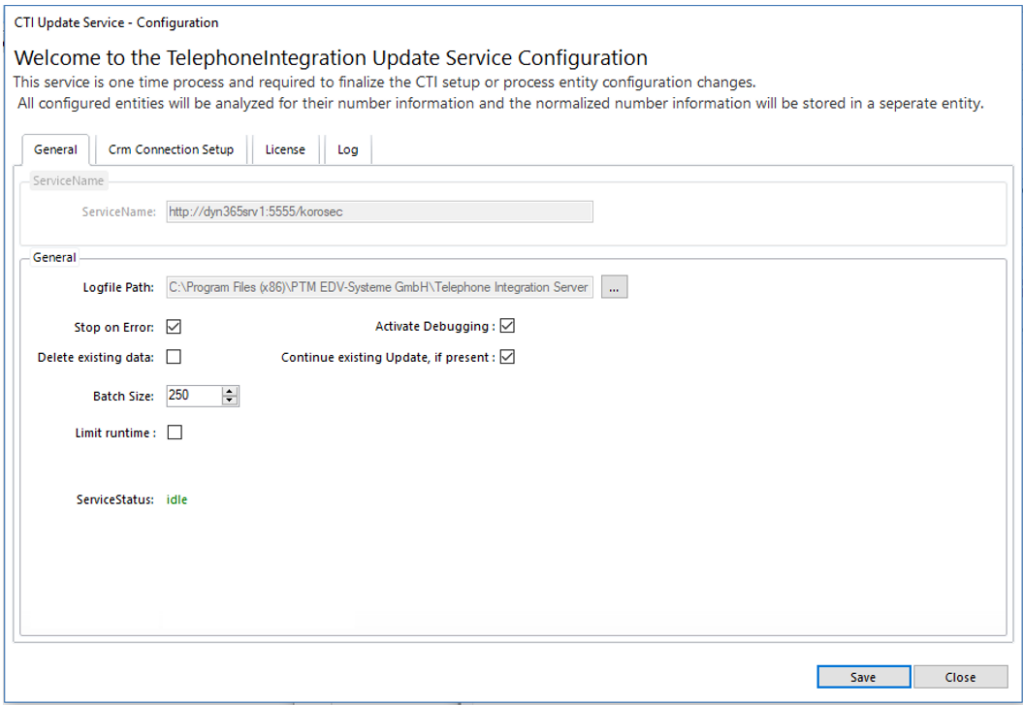


Figure 40: CTI Update Service Configuration dialog

3.3 How to open the Local License Manager

To read more about the local license manager please click on this link, and scroll down to "2 The Local License Manager".

4 TelephoneIntegration Overview Dashboard

Importing the TelephoneIntegration solution into a Dynamics 365 organization creates a new dashboard. This dashboard shows the overview of phone call activities based on the TelephoneIntegration history entity.

Open the dashboards in your Microsoft Dynamics 365 environment (*Workplace >Dashboards)* and look for the Telephone Integration Overview dashboard in the drop-down menu.

It consists of 6 parts, which can all be customized:

1. CHART SHOWING ALL CALLS PER DAY AND DIRECTION
2. CHART SHOWING ALL CALLS PER DIRECTION AND PER RESOLVED CALLER ENTITIES
3. CHART SHOWING ALL CONNECTED AND UNCONNECTED CALLS PER RESOLVED CALLER ENTITIES
4. CHART SHOWING ALL CALLS PER USER
5. CHART SHOWING THE SUM OF ALL CALLS AND THE AVERAGE DURATION OF THE CALL
6. VIEW LIST OF ALL CALLS

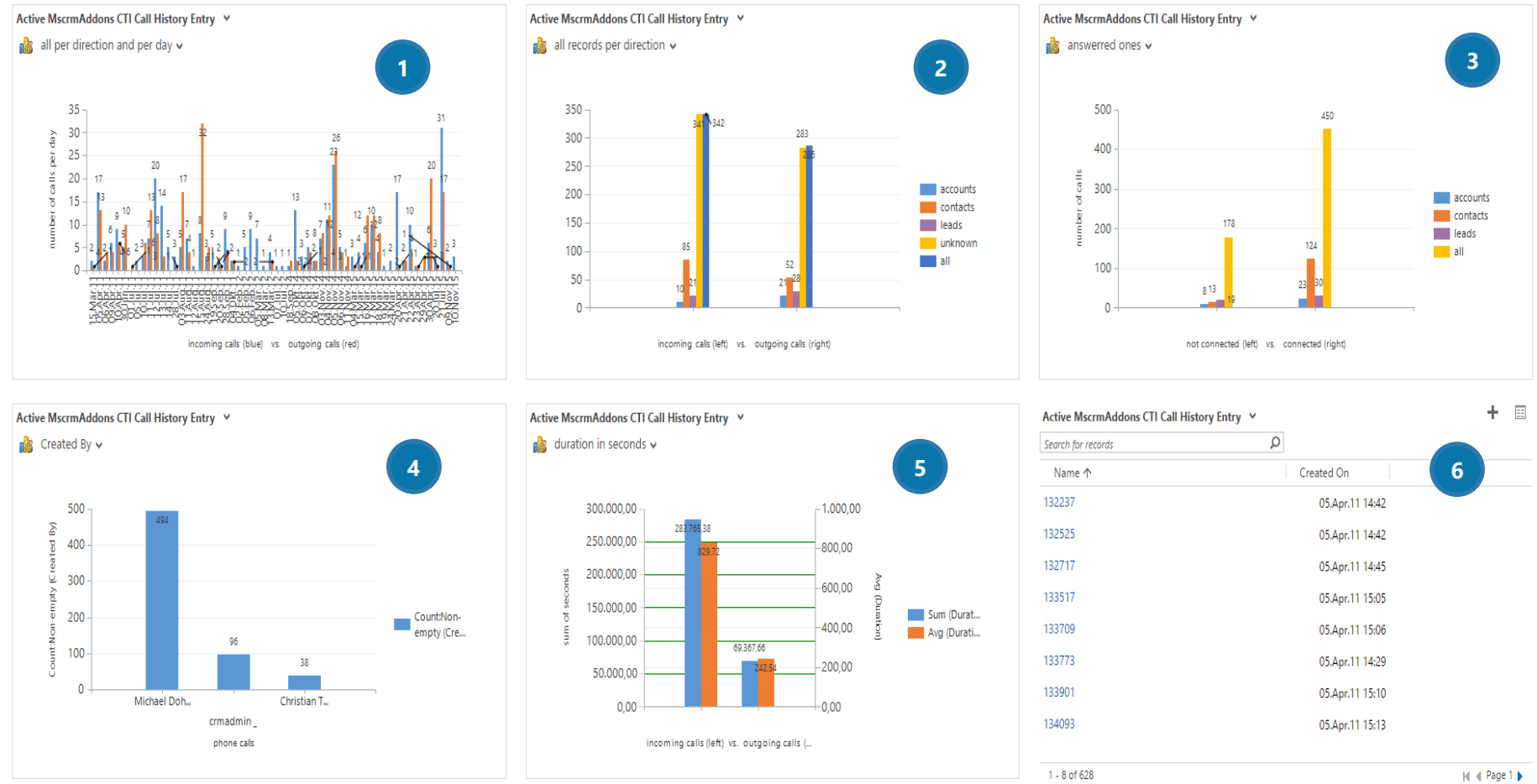


Figure 41: TelephoneIntegration dashboard overview

5 Uninstall

To uninstall TelephoneIntegration Server for Dynamics 365, please look for *Programs and Features* in the Control Panel.

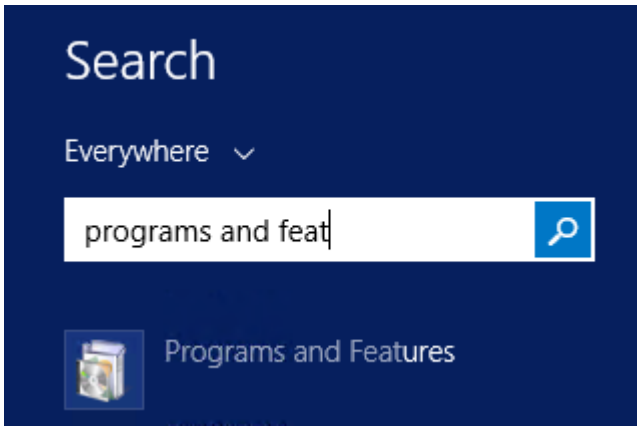


Figure 42: Control Panel – Programs and Features

Look for TelephoneIntegration Server in "Uninstall or change a program" to uninstall the TelephoneIntegration Server. Follow the Instructions to uninstall the TelephoneIntegration Server.

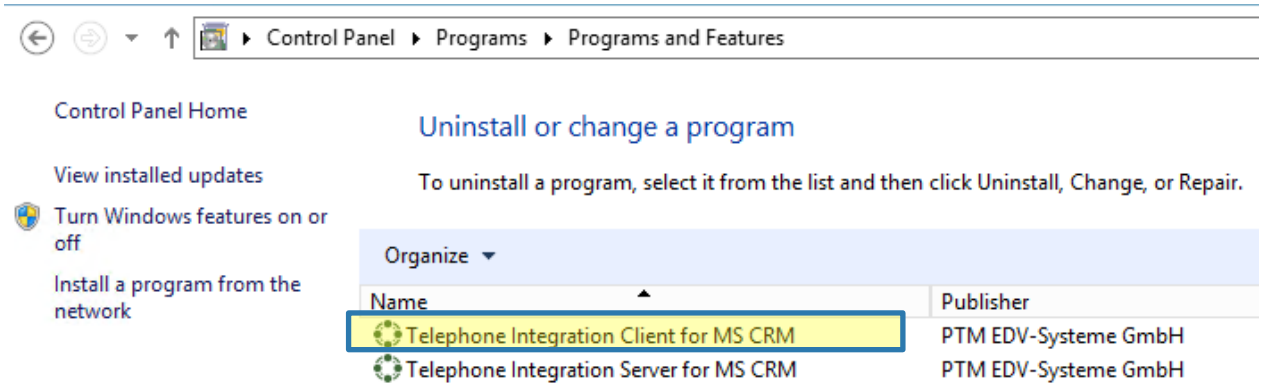


Figure 43: Control Panel – Uninstall TI

First, please mark the product you would like to uninstall. In the now opened dialog, click on the ***[Yes]***-button to uninstall TelephoneIntegration Server. Click on the ***[No]***-button if you prefer to uninstall TelephoneIntegration Server a little later.

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7 Contact

For further technical questions, please visit our blog http://blogs.mscrm-addons.com
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