



TelephoneIntegration for MS CRM 2011

Version 5.0, August 2013

Installation Guide

(How to install/uninstall TelephoneIntegration for MS CRM 2011)

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1 Common Information

Before installing **TelephoneIntegration Server for MS CRM 2011**, please read this document and follow the steps carefully.

If you need to reach us, see the Contact page.

1.1 Intended Audience

This guide is intended for system administrators who are familiar with the following administrative tasks:

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

The installation consists of the following steps:

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

- Installing TelephoneIntegration Server for MS CRM 2011
- Configuring TelephoneIntegration

2 License

The product comes with a 14-days trial license. Information about licensing can be found on www.mscrm-addons.com

3 Prerequisites

3.1 Microsoft .NET Framework 4.0 RTM is required

The RTM version of Microsoft .NET Framework 4.0 is required.

3.2 Supported CRM Versions

- Microsoft Dynamics CRM 2011 RC1 Version 5.0.9688.34

3.3 Windows Identity Foundation

Will be installed as part of the Telephone Integration Server Setup

3.4 Supported Operating Systems

- Windows 7 32/64bit
- Windows Vista 32/64bit
- Windows Server 2008 32/64bit
- Windows Server 2008 R2 32/64bit

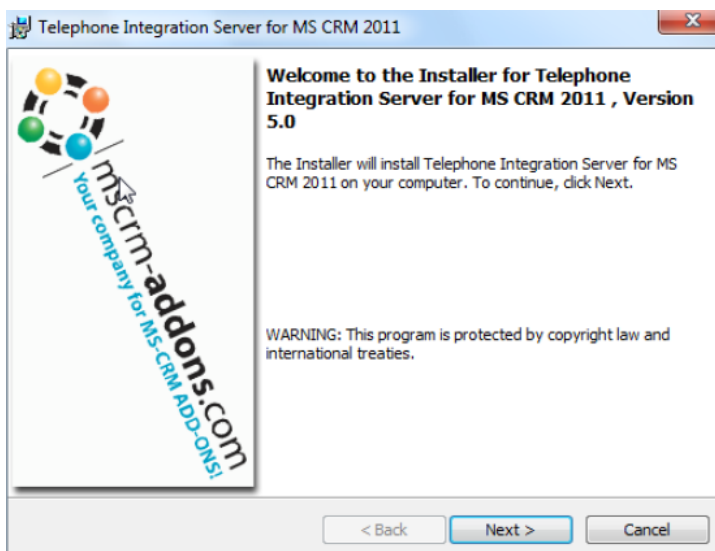
4 Installation

You could install Telephone Integration Server for Microsoft Dynamics CRM 2011 Beta on any supported operating system which is able to connect to your CRM 2011 Server.

During the installation you have to specify at least one organization in which Telephone Integration Server will be installed. After the setup is completed, you could start the Telephone Integration Server Configuration in the Windows Start Menu to install and configure Telephone Integration Server into another CRM Organization.

4.1 Introduction

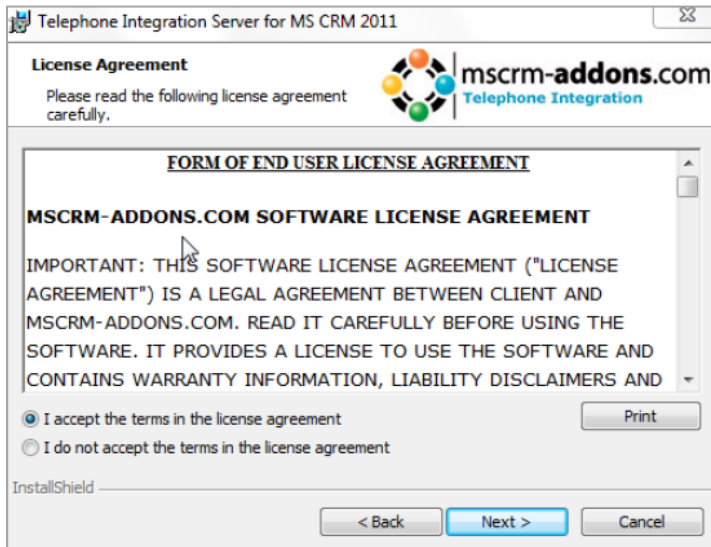
Run the Telephone Integration Server for MS CRM 2011 Setup file. The following window will appear:



Click [Next] to proceed.

INFORMATION: If an upgrade is detected, a message will be shown and the setup will go to chapter 4.4 directly after accepting the EULA [4.2]

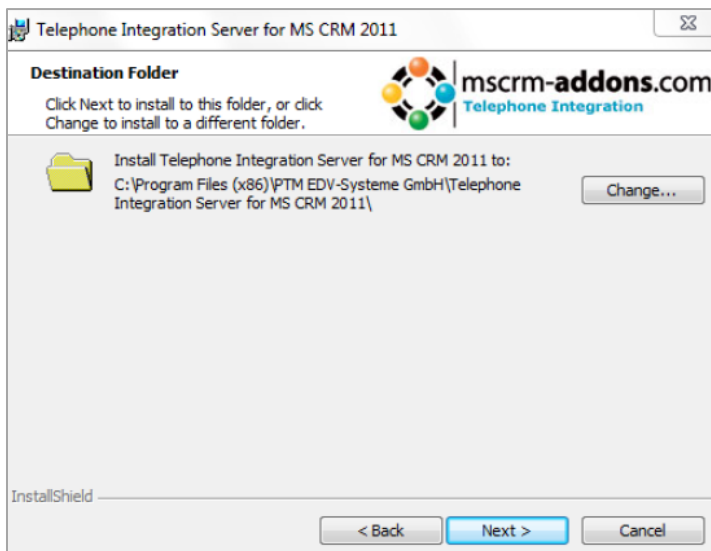
4.2 EULA (End User License Agreement)



Click [Next] to proceed.

4.3 Folder Selection

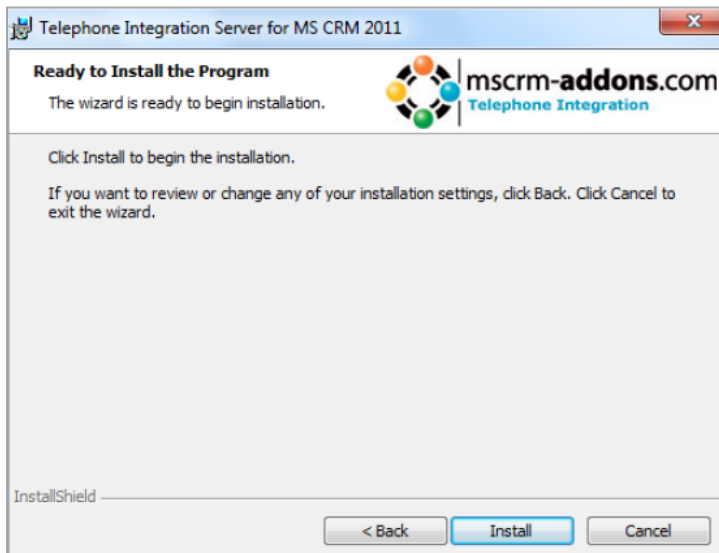
Here it's possible to set the installation directory.



Click [Change] to specify a different installation path.
Click [Next] to proceed.

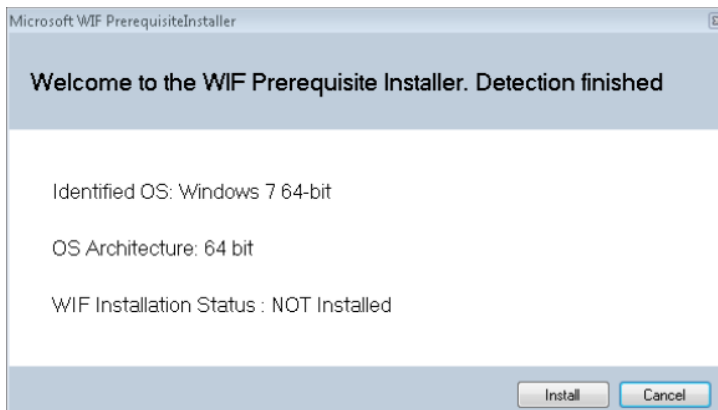
4.4 Confirm Installation

To start the installation, click on [Install].
To change the settings, click on [Back].



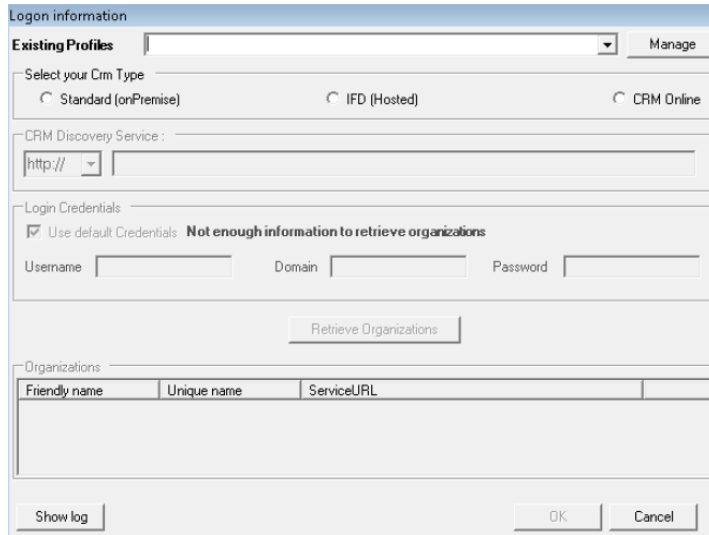
4.5 Install Windows Identity Foundation

To use Telephone Integration Server for MS CRM 2011 you have to install the Windows Identity Foundation.



4.6 Configure CRM Server

To configure your CRM Server, select your Profile or create a new profile and select your CRM Server type:



Logon information

Existing Profiles: [Empty] Manage

Select your Crm Type:
 Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service:
 http:// [Empty]

Login Credentials:
 Use default Credentials **Not enough information to retrieve organizations**
 Username: [Empty] Domain: [Empty] Password: [Empty]

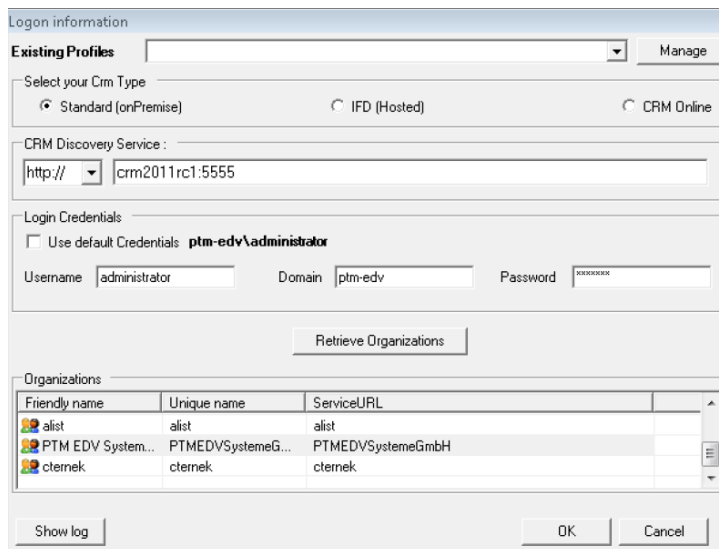
[Retrieve Organizations]

Organizations:

Friendly name	Unique name	ServiceURL

Show log OK Cancel

Enter the CRM server name and add your login credentials by filling in the field's: [username], [password] and [domain] or choose the default credentials (Integrated security). As soon as the Organizations are retrieved, select the Organization you want to connect and press the "OK"-button.



Logon information

Existing Profiles: [Empty] Manage

Select your Crm Type:
 Standard (onPremise) IFD (Hosted) CRM Online

CRM Discovery Service:
 http:// crm2011rc1:5555

Login Credentials:
 Use default Credentials **ptm-edv\administrator**
 Username: administrator Domain: ptm-edv Password: [Masked]

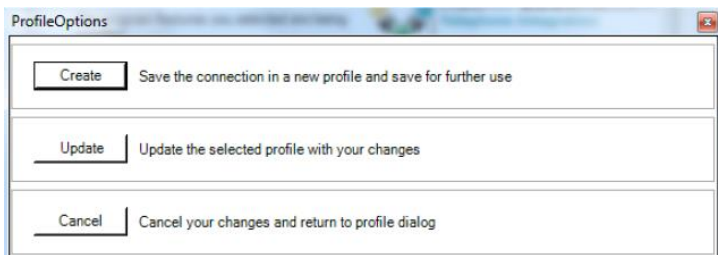
[Retrieve Organizations]

Organizations:

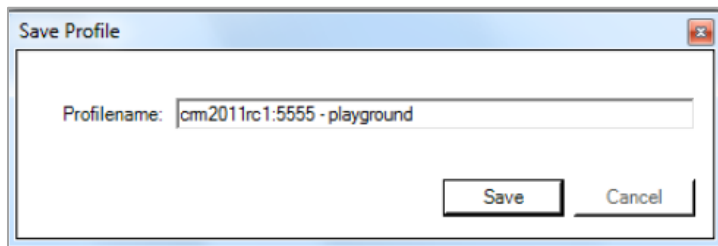
Friendly name	Unique name	ServiceURL
alist	alist	alist
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
cternek	cternek	cternek

Show log OK Cancel

If you chose to edit an existing connection Profile, you will see the following dialog. If you want to create a new Profile click "Create", or click "Update" if you want to update an existing profile. You can also click the "Cancel"-button if you want to go back.

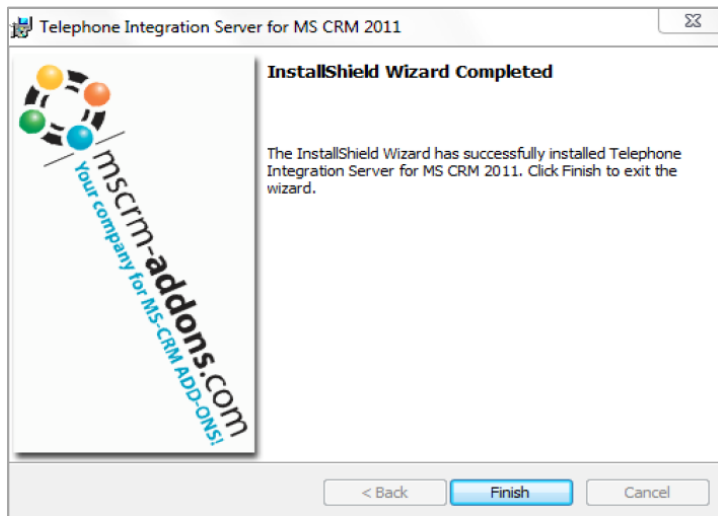


If you created a new profile, click the "Save"-button to save your Profile.



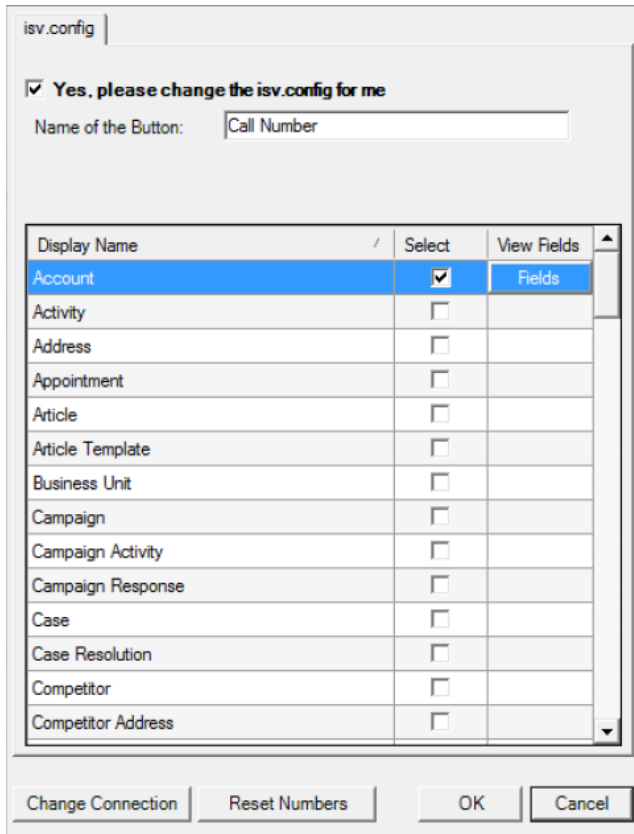
4.7 Finish Setup

The Telephone Integration Server Configuration will start automatically for the organization you selected during the setup.



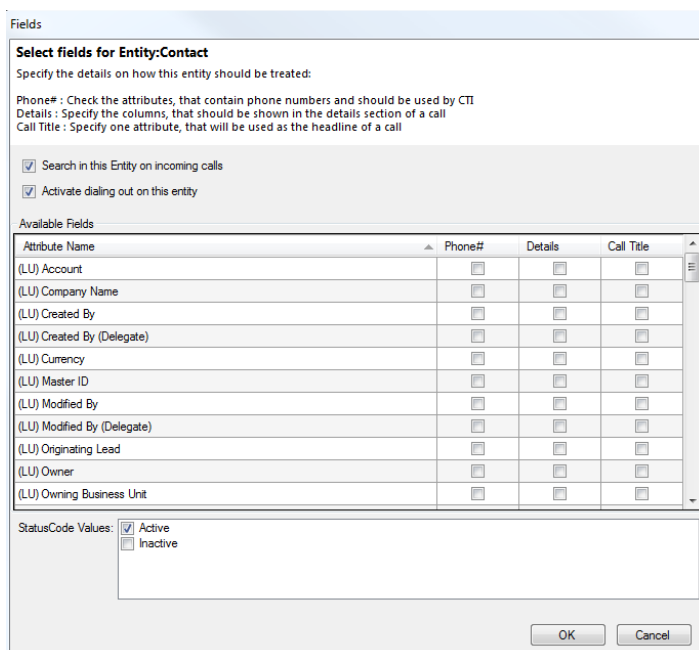
5 TelephoneIntegration Configuration

In the TelephoneIntegration Configuration you are able to select the entities that are used by the TI-Client to search for numbers on incoming Calls and to activate the dial-out option.



Display Name	Select	View Fields
Account	<input checked="" type="checkbox"/>	Fields
Activity	<input type="checkbox"/>	
Address	<input type="checkbox"/>	
Appointment	<input type="checkbox"/>	
Article	<input type="checkbox"/>	
Article Template	<input type="checkbox"/>	
Business Unit	<input type="checkbox"/>	
Campaign	<input type="checkbox"/>	
Campaign Activity	<input type="checkbox"/>	
Campaign Response	<input type="checkbox"/>	
Case	<input type="checkbox"/>	
Case Resolution	<input type="checkbox"/>	
Competitor	<input type="checkbox"/>	
Competitor Address	<input type="checkbox"/>	

To view Fields click on the "Fields"-button. You can select "Phone#", "Details" or "Call Title". You can also choose a different connection or reset your numbers.



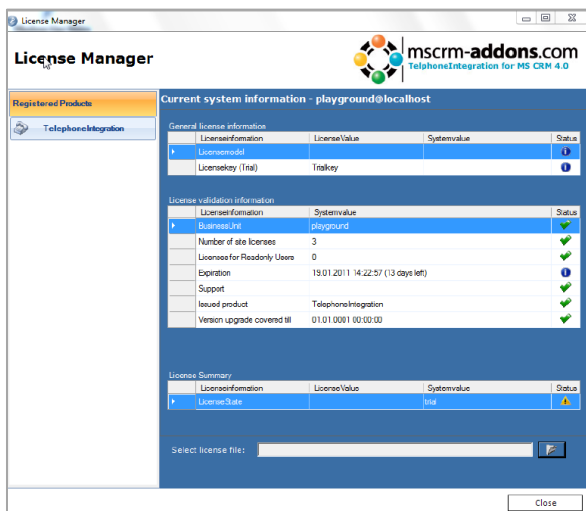
Attribute Name	Phone#	Details	Call Title
(LU) Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Company Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Created By	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Created By (Delegate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Master ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Modified By	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Modified By (Delegate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Originating Lead	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Owner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Owning Business Unit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The update service retrieves the needed information (determined by the administrator within the CTI-configuration interface) from the CRM system, processes it and provides it for TelephoneIntegration. This is essential for enabling TelephoneIntegration to operate. The update service e.g. ensures that telephone numbers are provided to perform calls or that information about the caller/called person are provided within the TI user interface (balloon) for a more efficient call handling, etc. For more information, please read our [blog article](#).

6 License Management

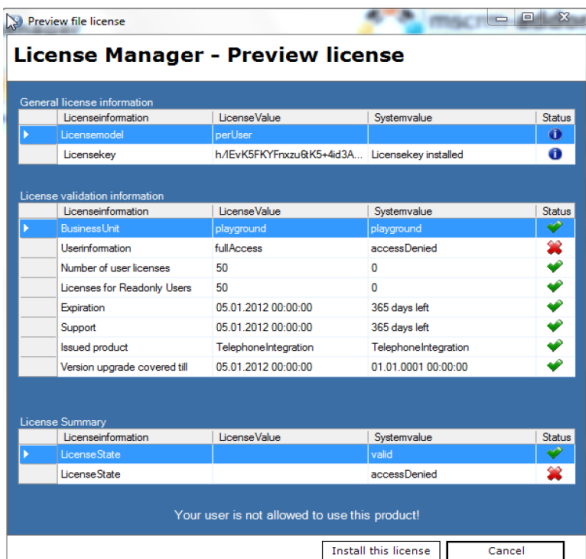
6.1 License Manager

Open Telephone Integration License Manager from the start menu (www.msrm-addons.com) and choose the connection (Usually you just need to hit OK).



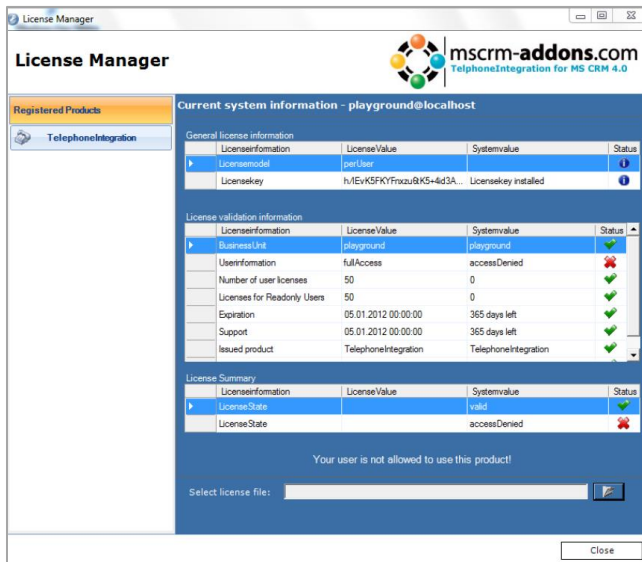
While the Trial version is enabled you will see the above screen.

To install a license select the Open Button and you will be prompted to select the license file. Opening the license file will display the following dialog:



The selected license is valid, but unless you enabled the user in the CRM (See => 6.2) to be able to use CTI the user will see the accessDenied status.

The user who installs telephone integration does not need to have a license, only users that actually use the client need an active license. After installing the license the LicenseManager will display the license as in the next picture

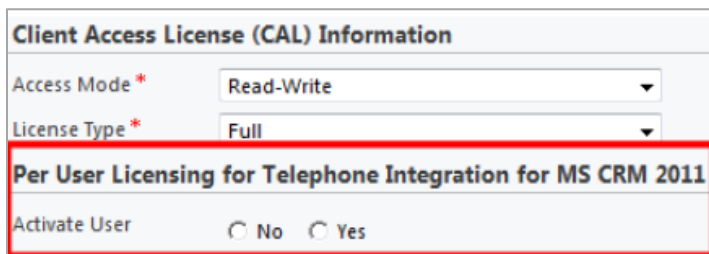


You can see in this Example that the Telephone Integration has a valid license but the users license access is denied.

6.2 Per User Licensing (Default for Telephone Integration 2011)

In CRM 2011 go to Settings/Administration/Users and pick a User. You will see "Per User Licensing for Telephone Integration" where you are able to activate a user's license.

The setup will also customize the Systemuser entity in CRM to enable User activation for the Client Software of Telephone Integration.



To enable the user open the Systemusers record in CRM and activate the user:

Client Access License (CAL) Information

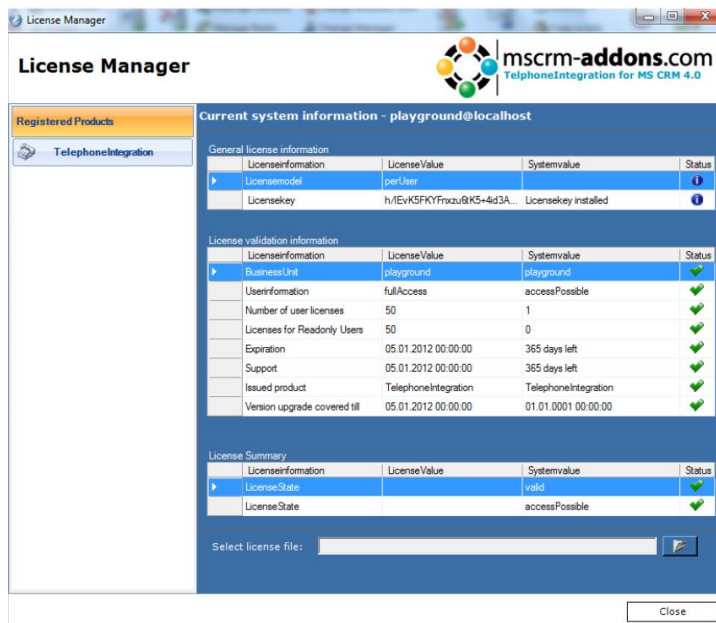
Access Mode *

License Type *

Per User Licensing for Telephone Integration for MS CRM 2011

Activate User No Yes

When you open license manager again license state should be valid now.



7 Security Roles

General securityroles for all products:

The following securityrole is required by all our products.

- MSCRM-Addons General Security Role

This security role contains the basic requirements for using the product itself and to be able to perform the licensecheck.

Productspecific securityroles:

Following Securityroles are required only by specific products. All users that should work with the products require both the MSCRM-Addons General Security Role and the product specific security roles.

DocumentsCorePack:

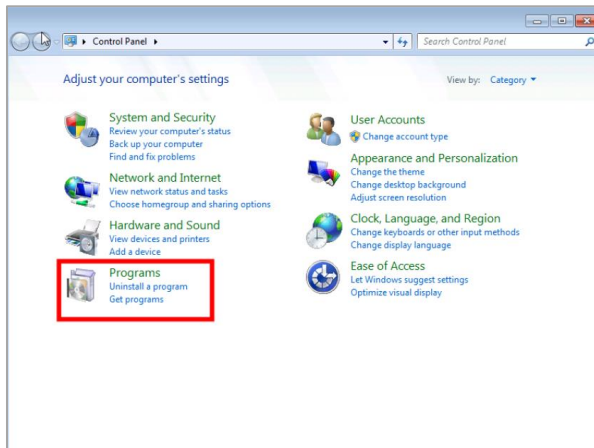
- DocumentsCorePack Security Role

TelephoneIntegration:

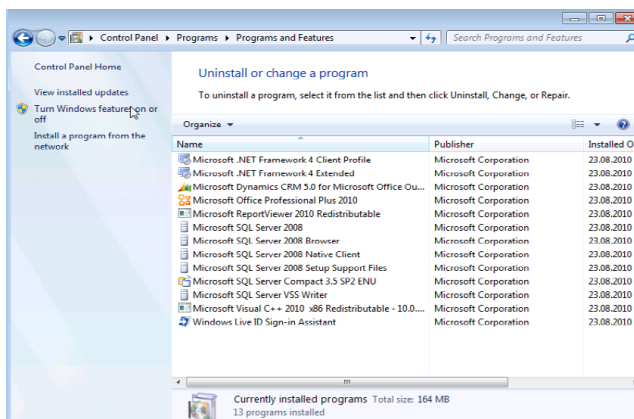
- TelephoneIntegration Security Role

8 Uninstall

To uninstall TelephoneIntegration Server for MS CRM 2011 select Programs in Control Panel.



Search for TelephoneIntegration Server CRM 2011 in "Uninstall or change a program" to uninstall TelephoneIntegration Server. Follow the Instructions to uninstall TelephoneIntegration Server.



9 Contact

If you have questions to the product send an Email to support@mscrm-addons.com or visit our blog <http://blogs.mscrm-addons.com>

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