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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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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 [here](#), extract and open it by hitting the PhoteTest.exe file. Start the tool and press the **[Get Started]**-button as you can see below.



Figure 1: Get Started

2.2 Select the plugin

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

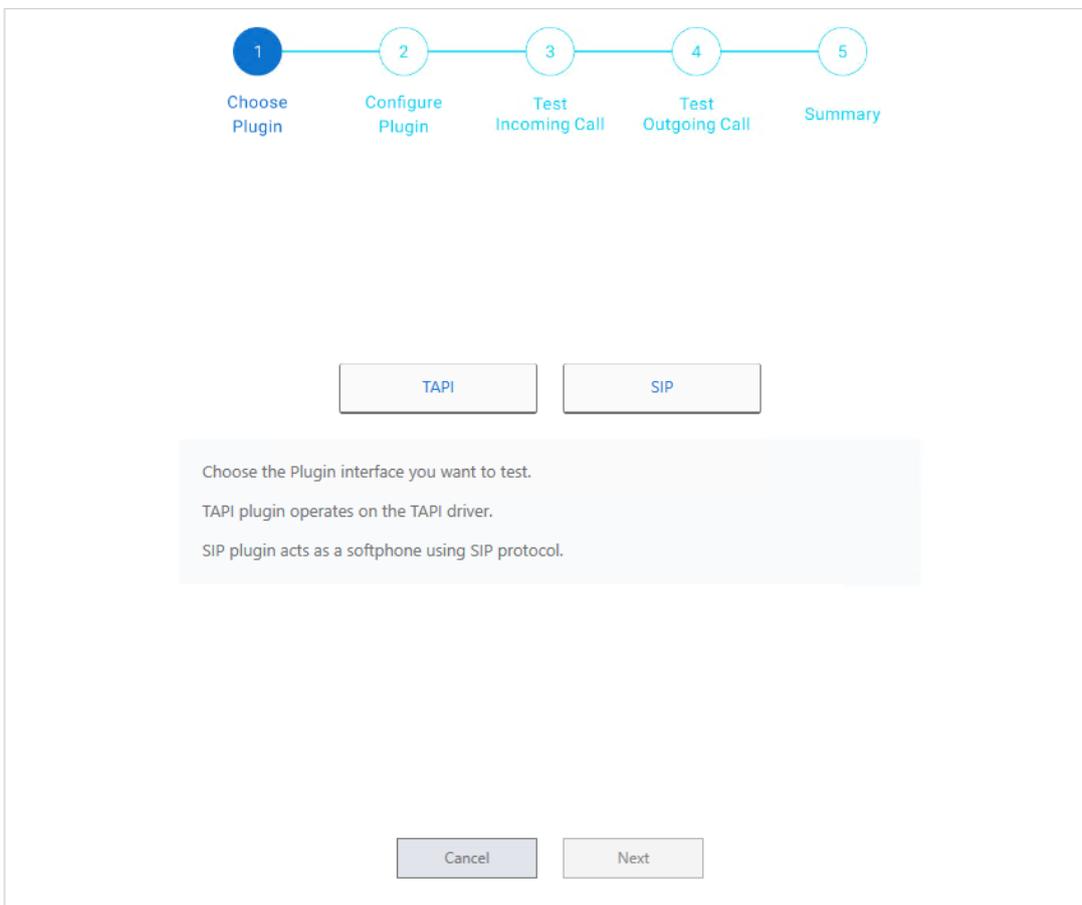
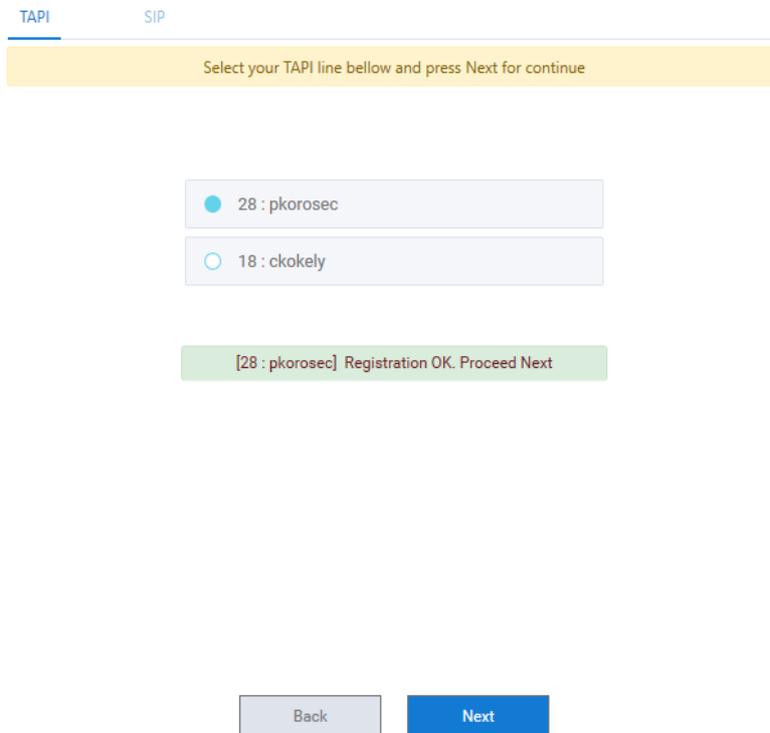


Figure 2: Choose the plugin interface you want to test

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.



TAPI SIP

Select your TAPI line bellow and press Next for continue

28 : pkorosec

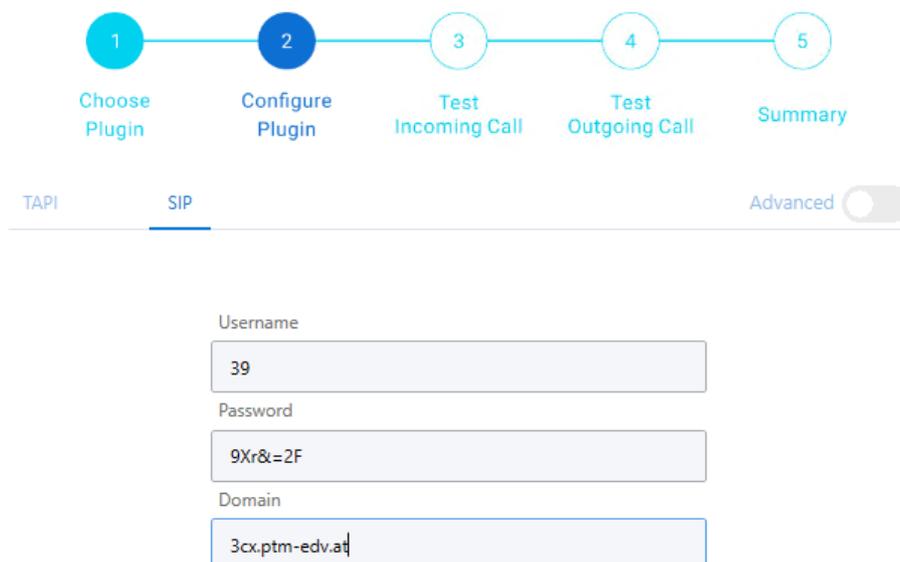
18 : ckokely

[28 : pkorosec] Registration OK. Proceed Next

Back Next

Figure 3: Configure 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.



1 Choose Plugin

2 Configure Plugin

3 Test Incoming Call

4 Test Outgoing Call

5 Summary

TAPI SIP Advanced

Username

39

Password

9Xr&=2F

Domain

3cx.ptm-edv.at

Figure 4: Configure plugin via SIP

2.4 Grant access

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

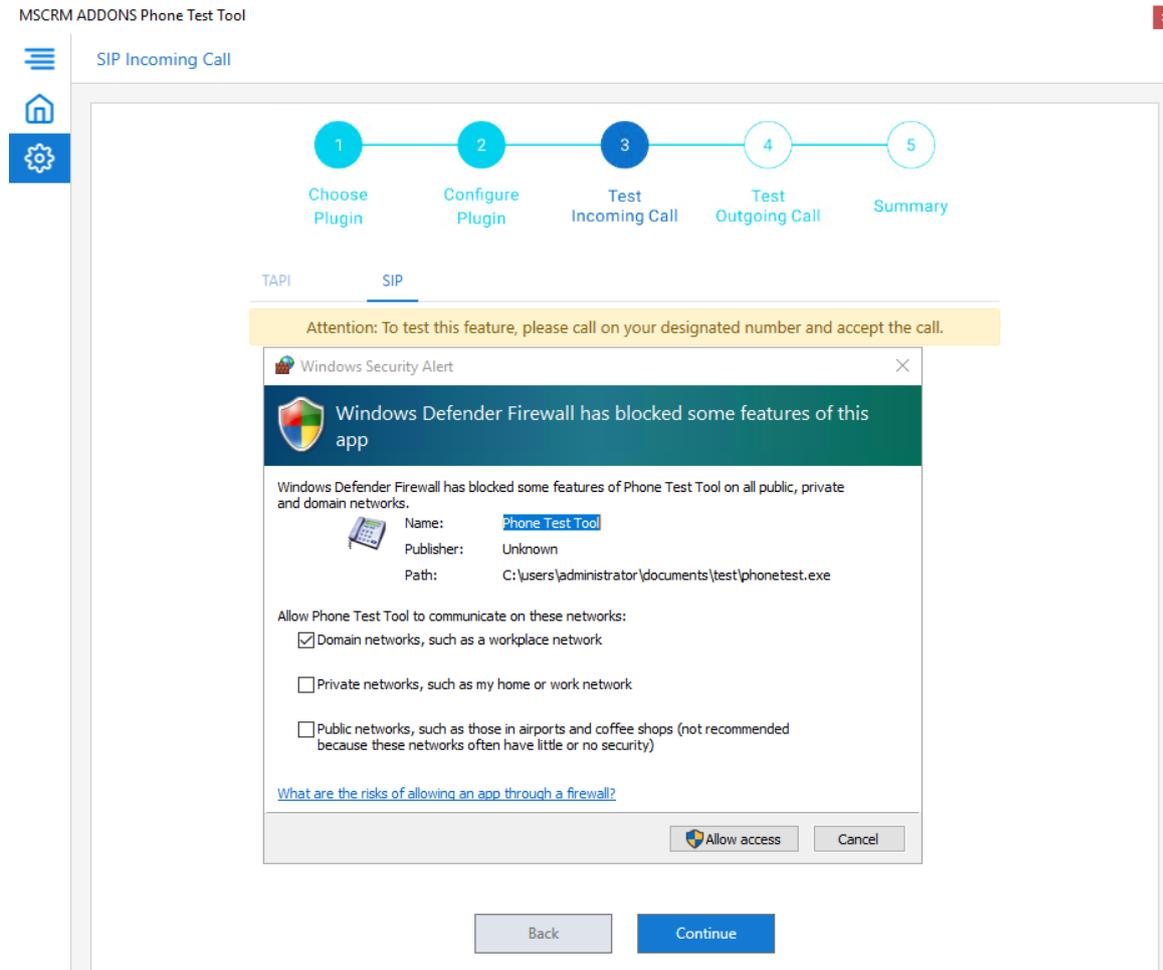


Figure 5: Grant access to the phone test tool

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.



Figure 6: Test incoming call

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

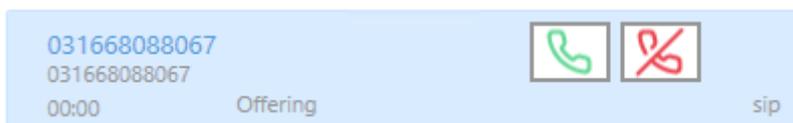


Figure 7: Accept or decline call

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

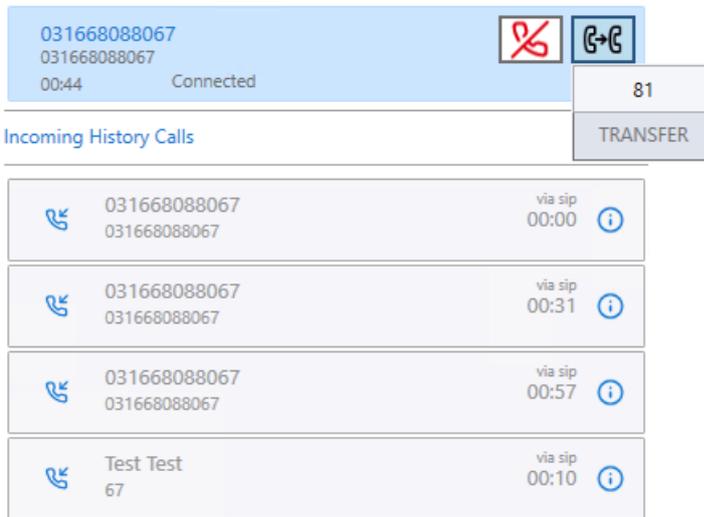


Figure 8: Transfer the phone call to another extension

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.

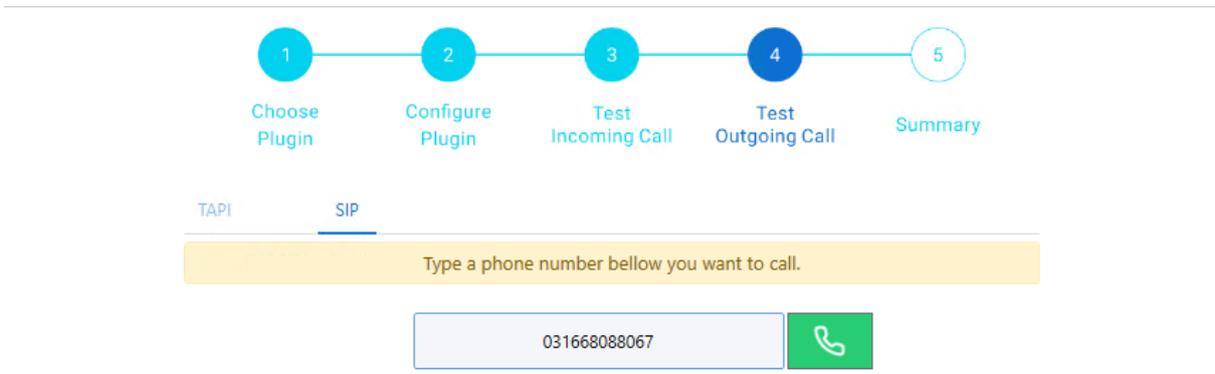


Figure 9: Test outgoing calls

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



Figure 10: Successfully tested features

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.

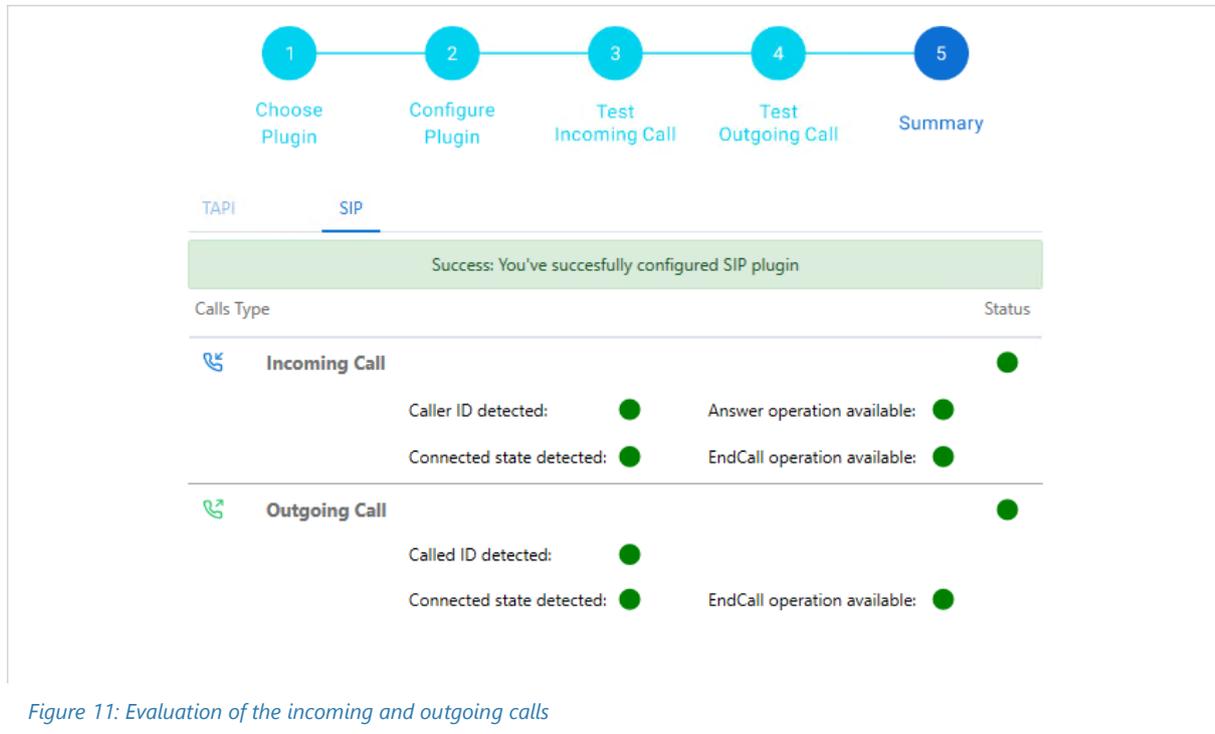


Figure 11: Evaluation of the incoming and outgoing calls

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5 Contact

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

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