mscrm-**addons**.com
Telephone Integration

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

Version 4.0

Implementation Guide
(How to install/uninstall,..)

Table of Contents

1 Installing of TI for MS CRM 4

Before installing **TI for MS CRM 4**, please read this document and follow the steps carefully.

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

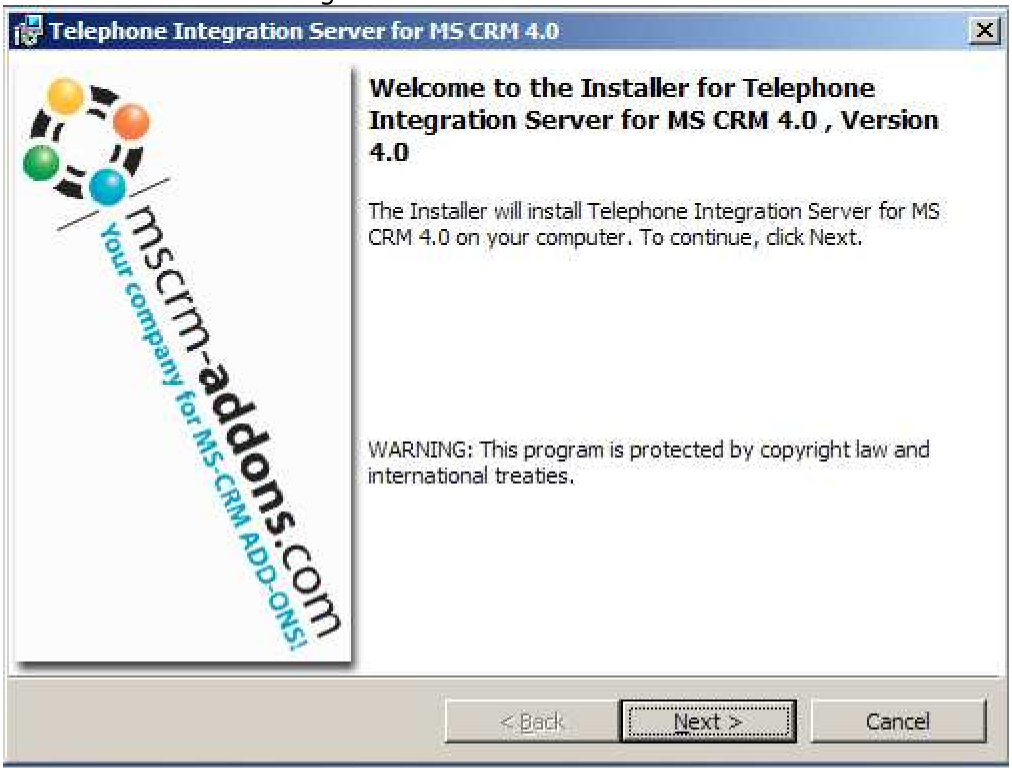
The installation consists of the following steps:
Follow each of the following steps, to complete the installation:

1. Installing the TI for MS CRM 4.
2. Configuring the ISV.CONFIG.XML

1.1 Installing

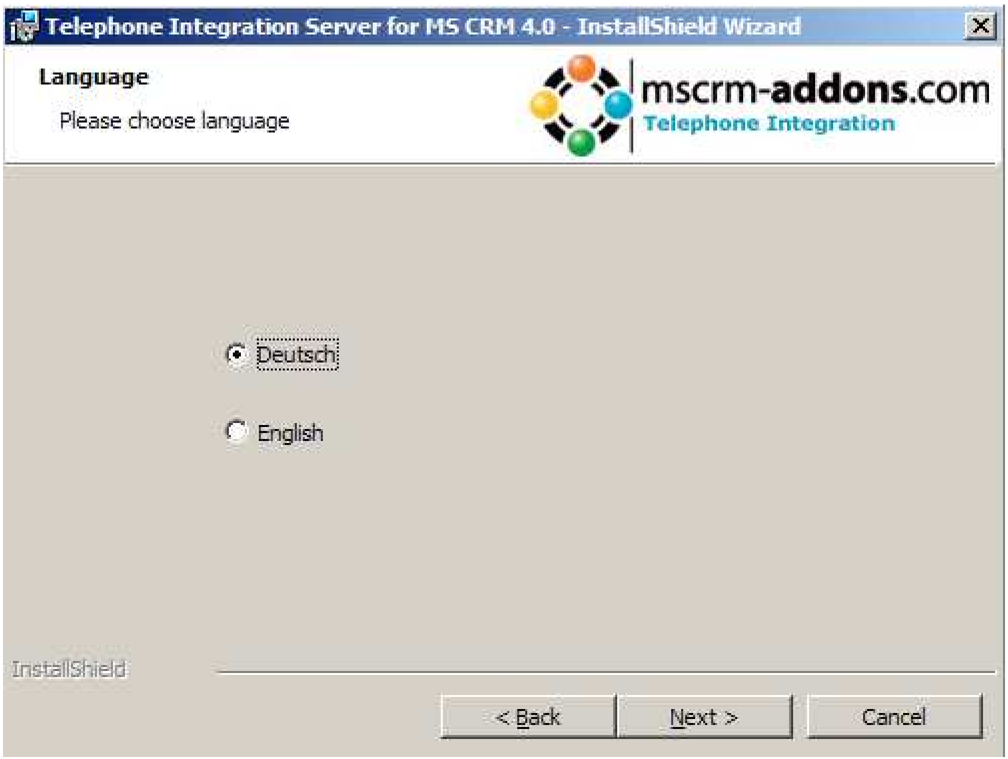
You have to install TI for MS CRM 4 on your server where MS CRM is running.

1. Run the "Telefone Integration Setup.msi" Setup file.
2. You will see following window:

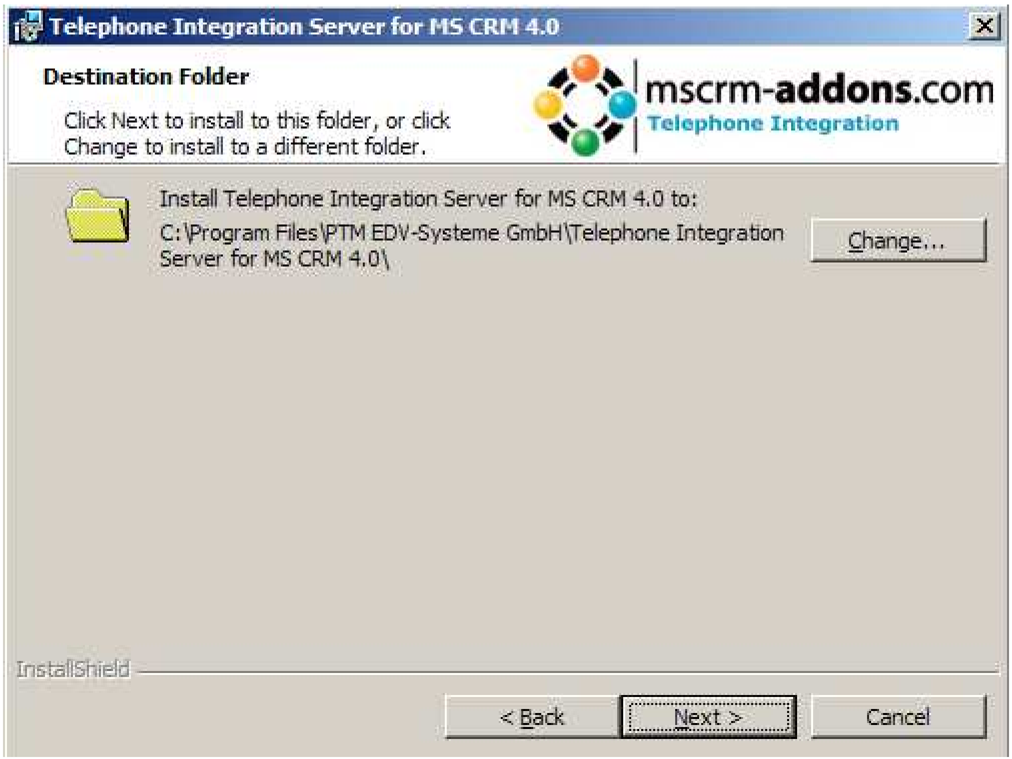


Click Next>

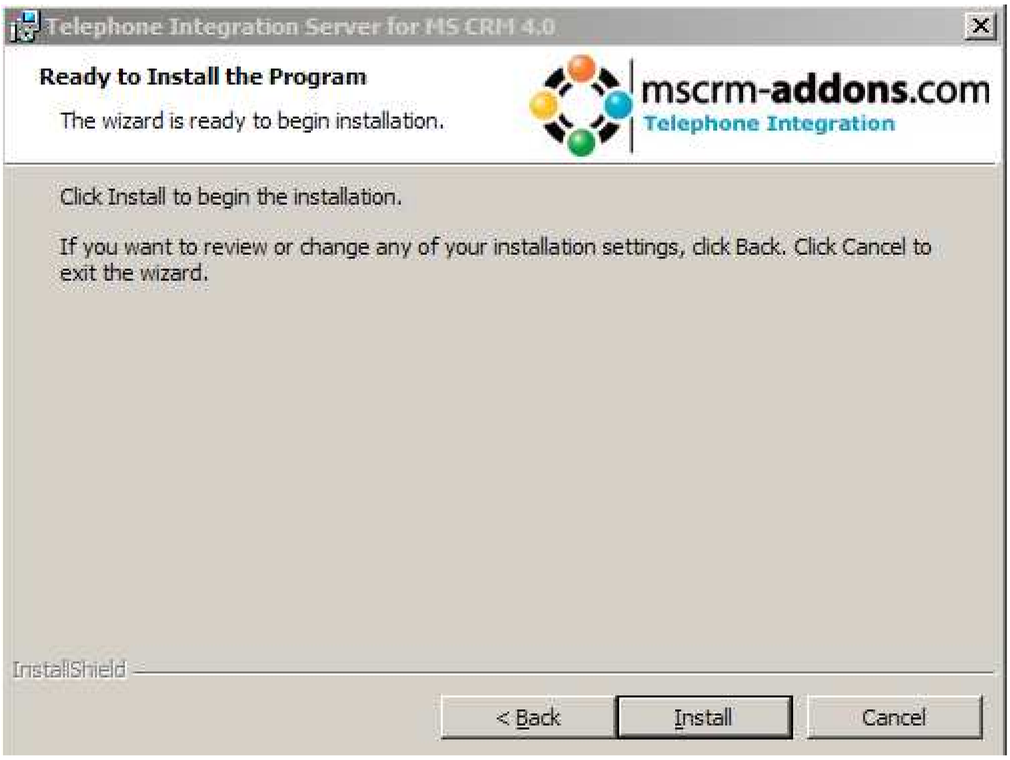
3. Select Language



4. Select a path



5. Confirm Installation

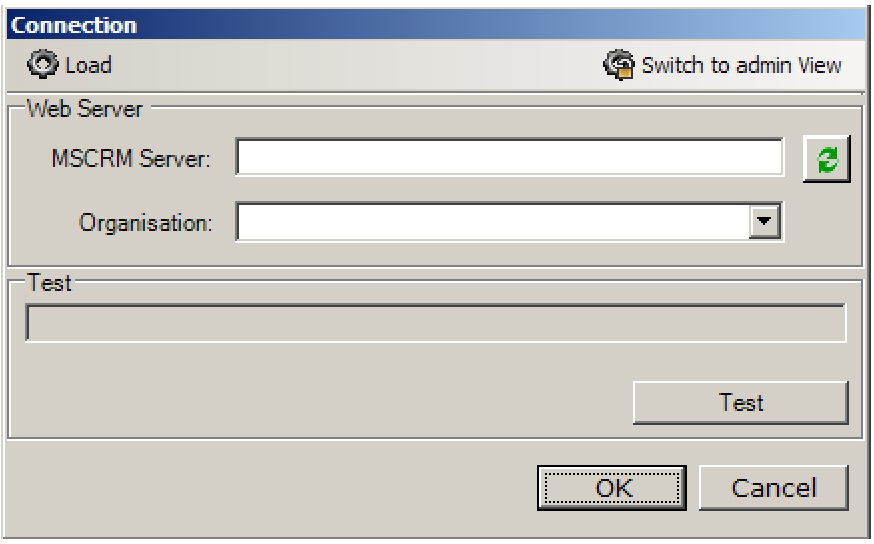


After Click on the Install Button the Installation begins.

6. Serversettings

Here you have to define the settings for the webservices and SQL-server connection.
IMPORTANT: you have to define both, WebService-settings and SQL-server settings.

7.1 WebService



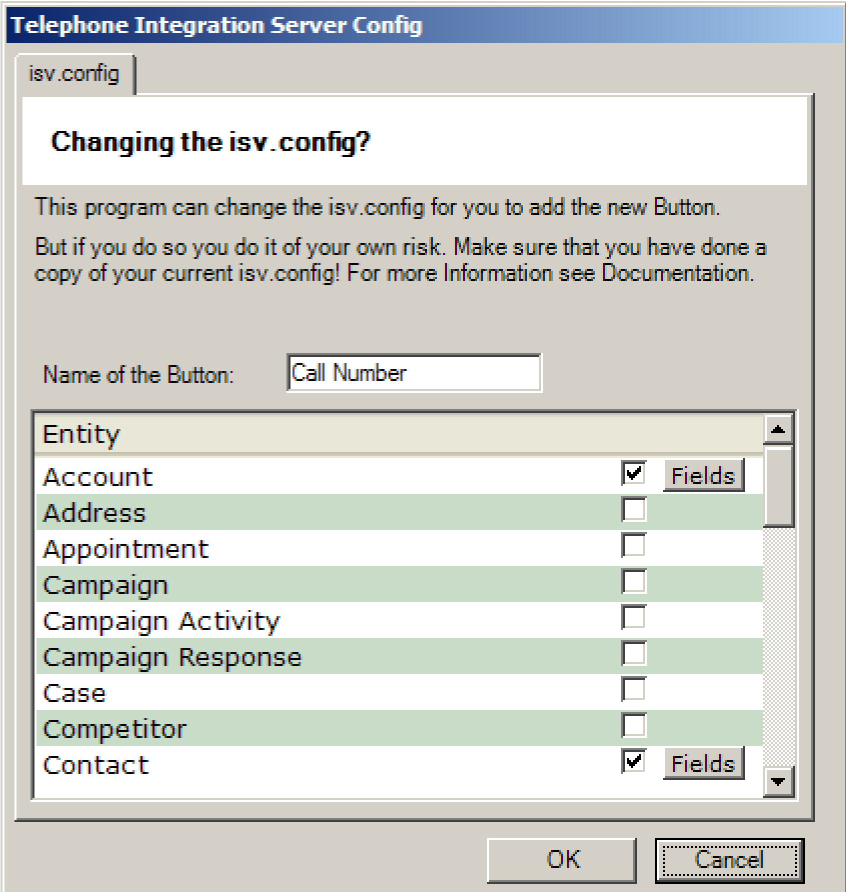
Server: the name of your MSCRM-Server witch you use in your Internet Explorer, without the http://.
IMPORTANT: if the port is not standard http-port(80) you have to mention the portnumber as well.
e.g. in our example the servername is *dev-crm4* and CRM-port is *5555*
HTTPS: check this box to use https, as you see, a certificate is required.

Test the connection with a click on "Test".

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

7. Setting up the ISV.CONFIG.XML

Here you can set if and where you want the new Button (so that you can use OutBoundCall).

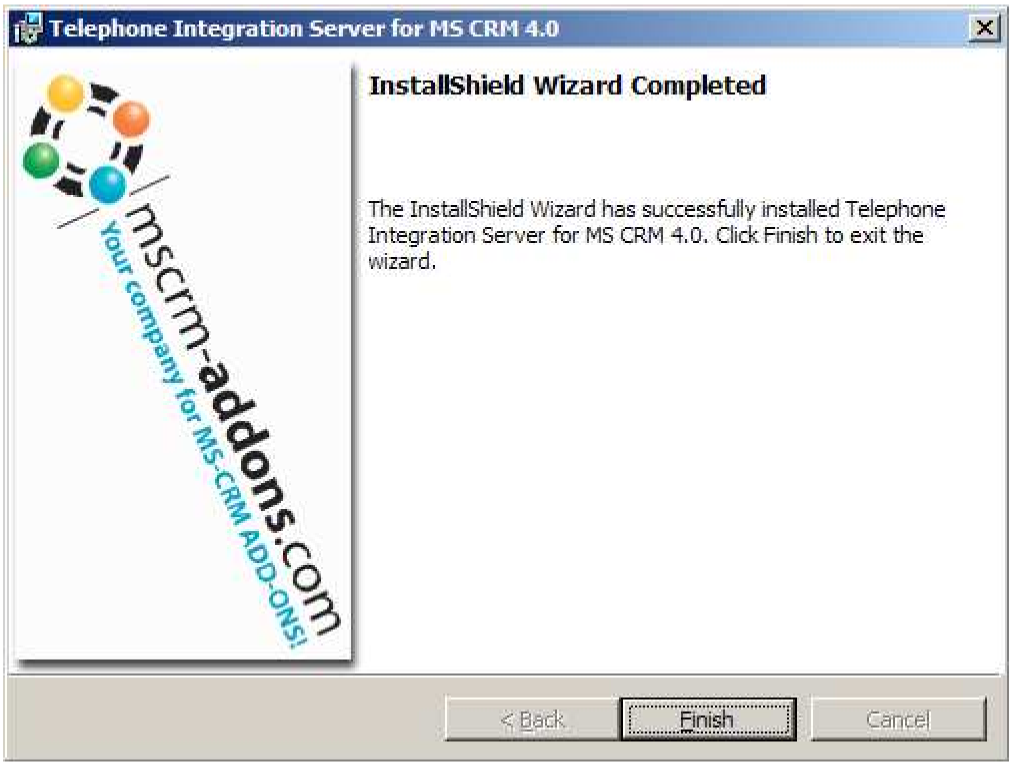


On the first install we add an example XML file to speed up installation. This adds the Button to the following entities:
* Contact * Company * Lead * Phone Call

Please Press OK to accept these settings.

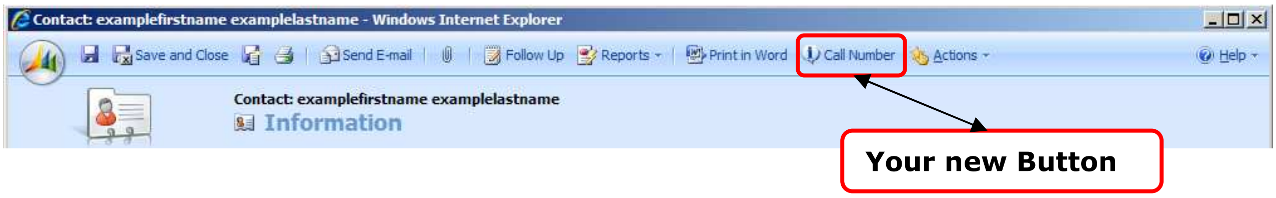
For more Information please see chapter 2.

8. After the installation ended you have to click on the “Finish” button



Result:

Now start MS CRM and open an Contact. Now the new Button should appear.



2 Adding/Changing the Button and set up the Telephone Integration logic!

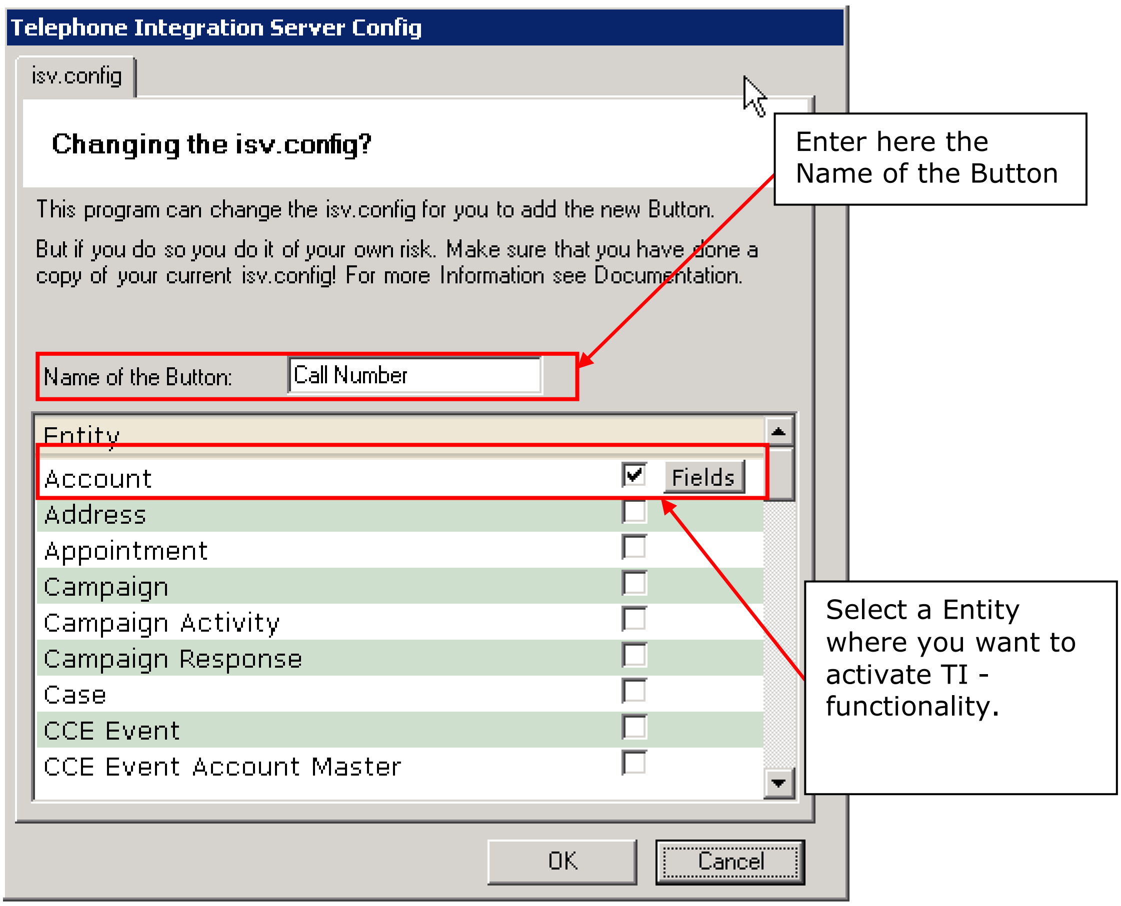
Call the Setup:

|Start| *All Programs - www.MSCRM-ADDONS.com – Telephone Integration for MS CRM 4 – Telephone Integration Setup*

In this Setup you can set in which Entity you want to have the TI-Functionality (to make a outbound call) and you also have to set up which Fields TI shows you and in which Fields the Client should search. So you are able to use any fields and entities you want.

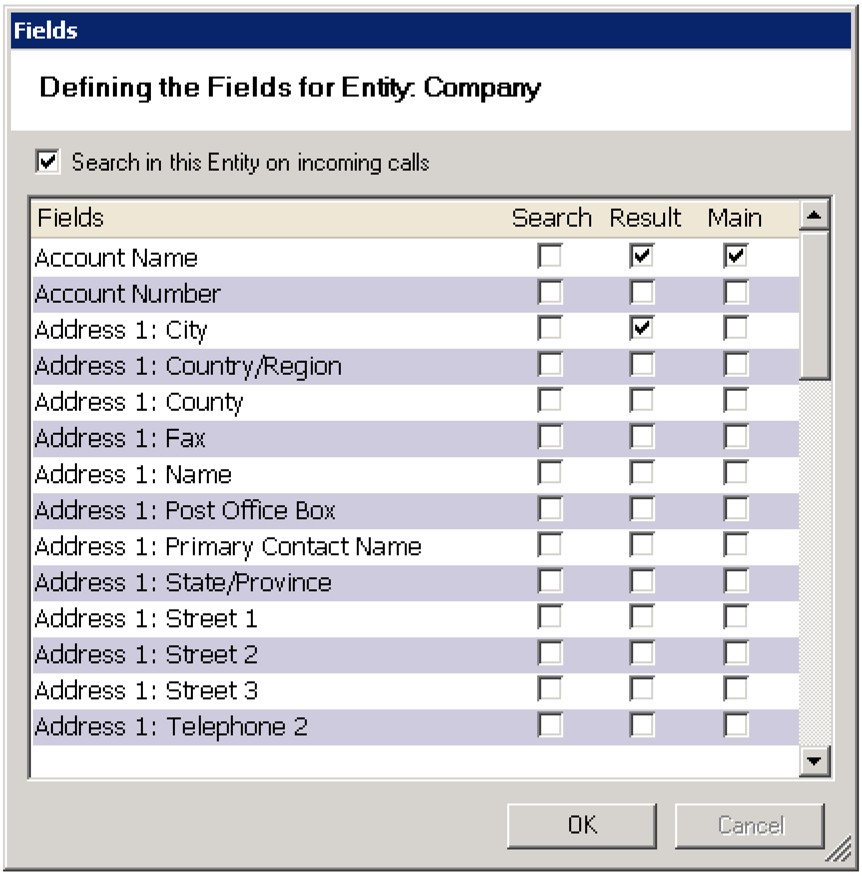
Let's explain this Step by Step.

Now you can change the things…

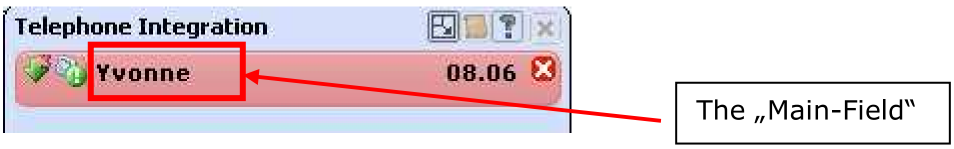


If you check an Entity the FIELDS-Windows will be automatically opened.

Otherwise you can open it by clicking the [Fields] Button.



Search: these are the fields where the client searches in this entity for the incoming number. ("Search with the incoming Number in 'Main Phone' and 'Other Phone' …)
Result: here you select the result fields, which you want to see as result. (… and show me 'Account Name' and 'City' as result")
Main: this is the Main-Result-Field. TI-Client uses this as headline.



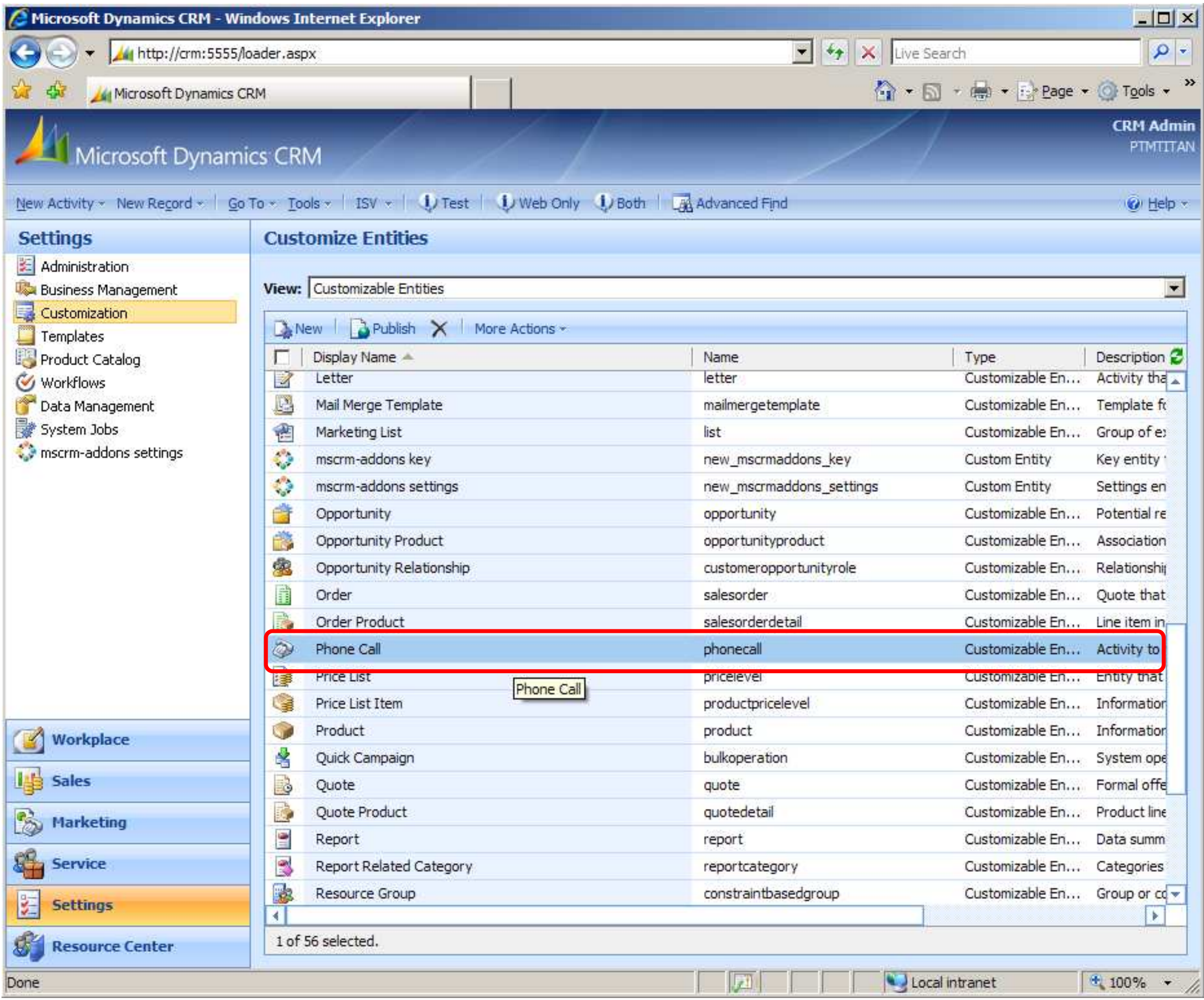
You have to declare at least one Search-, Result- and Main-Field. By pressing OK TI-Setup immediately stores the settings for this Entity!

If there is an incoming Call, the TI Client searches for this Number in each Entity you selected, so more Entities you select, as longer TI needs to search for it.

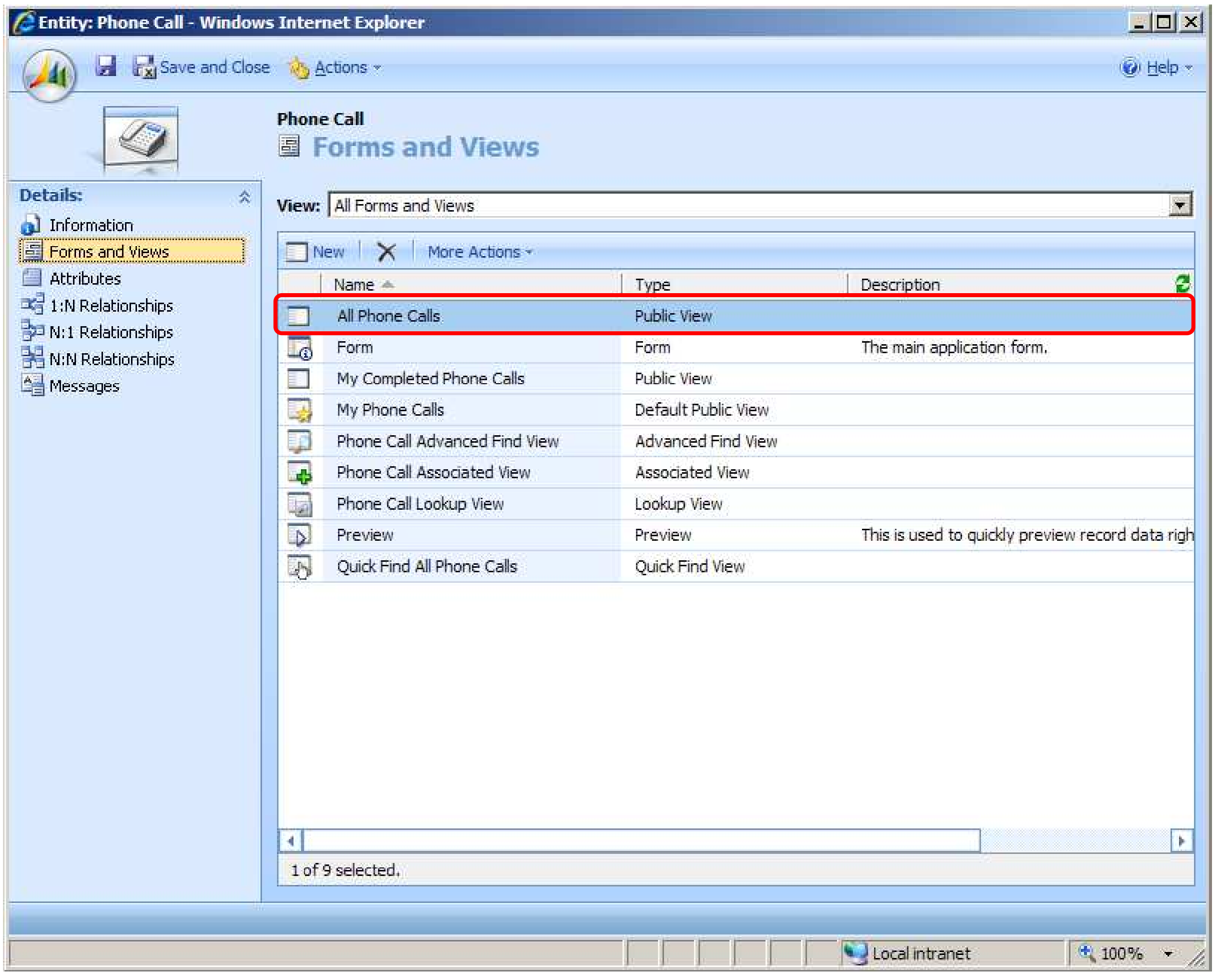
The Outboundcall-Window also uses the Search-Fields.

3 Changing OnLoad Event

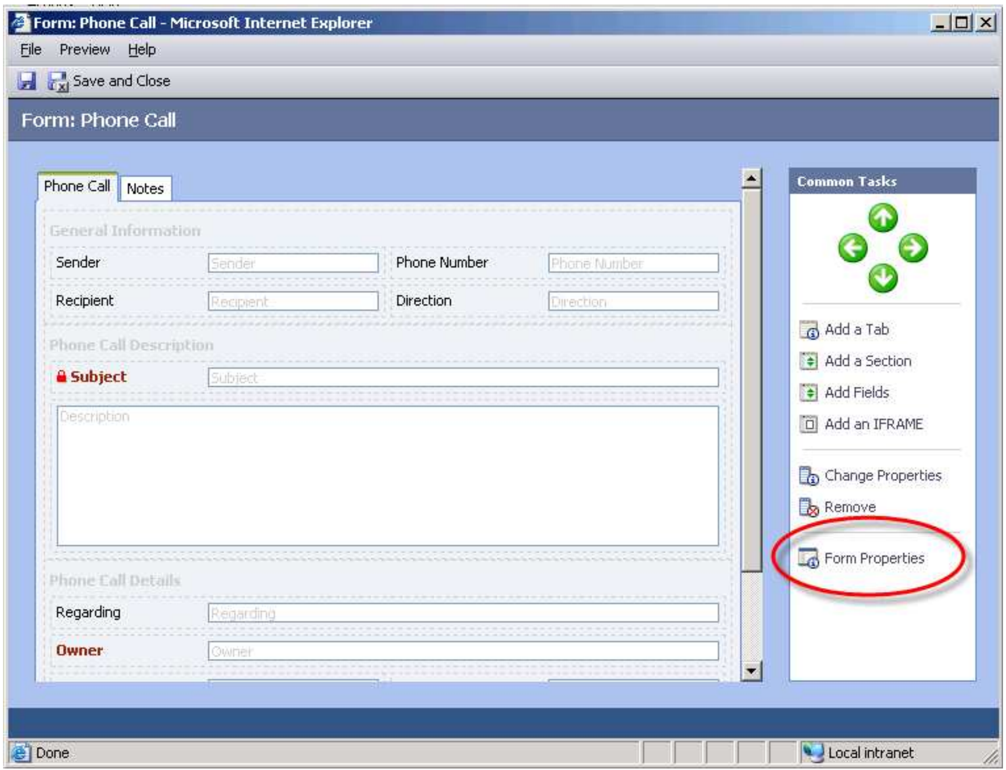
To Change this Event by Hand you have to open the Entity Phone Call.



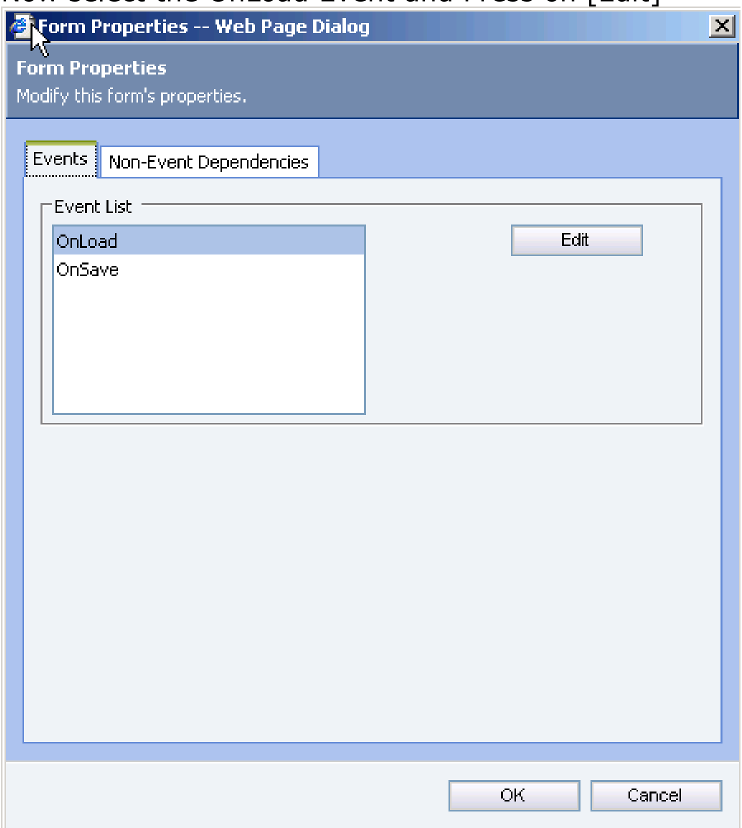
Switch to Forms and Views and open the Main Form.



Click on Form Properties

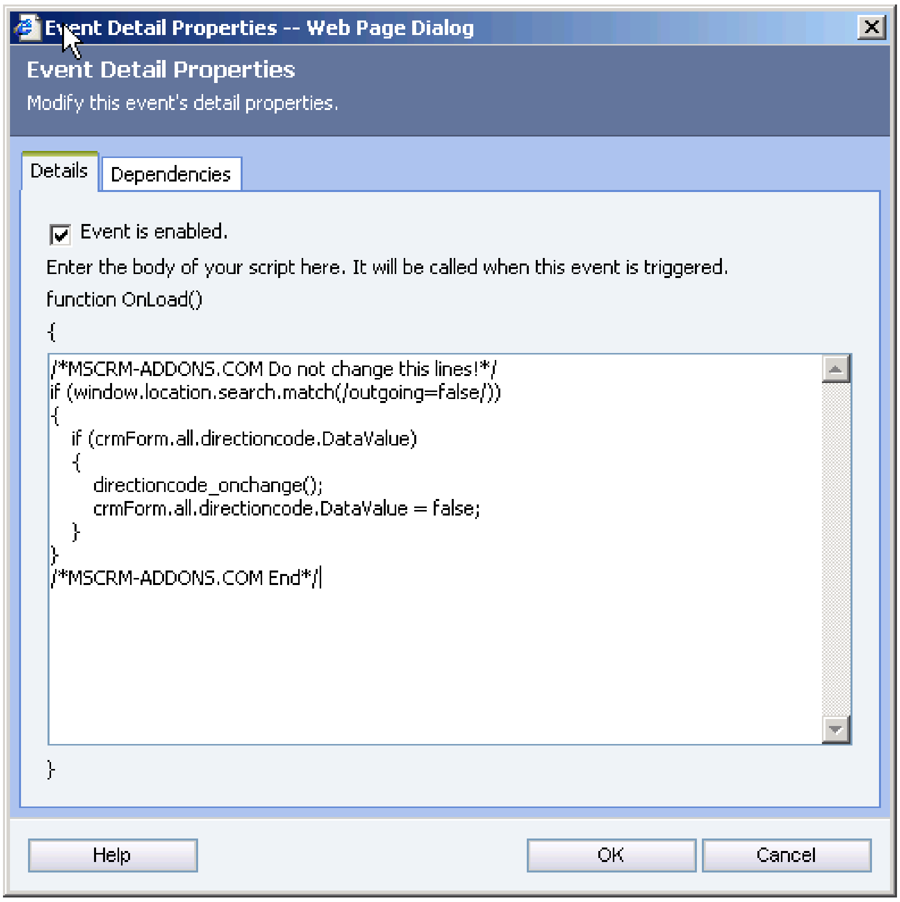


Now select the OnLoad Event and Press on [Edit]



Enable this Event and add the following Lines:

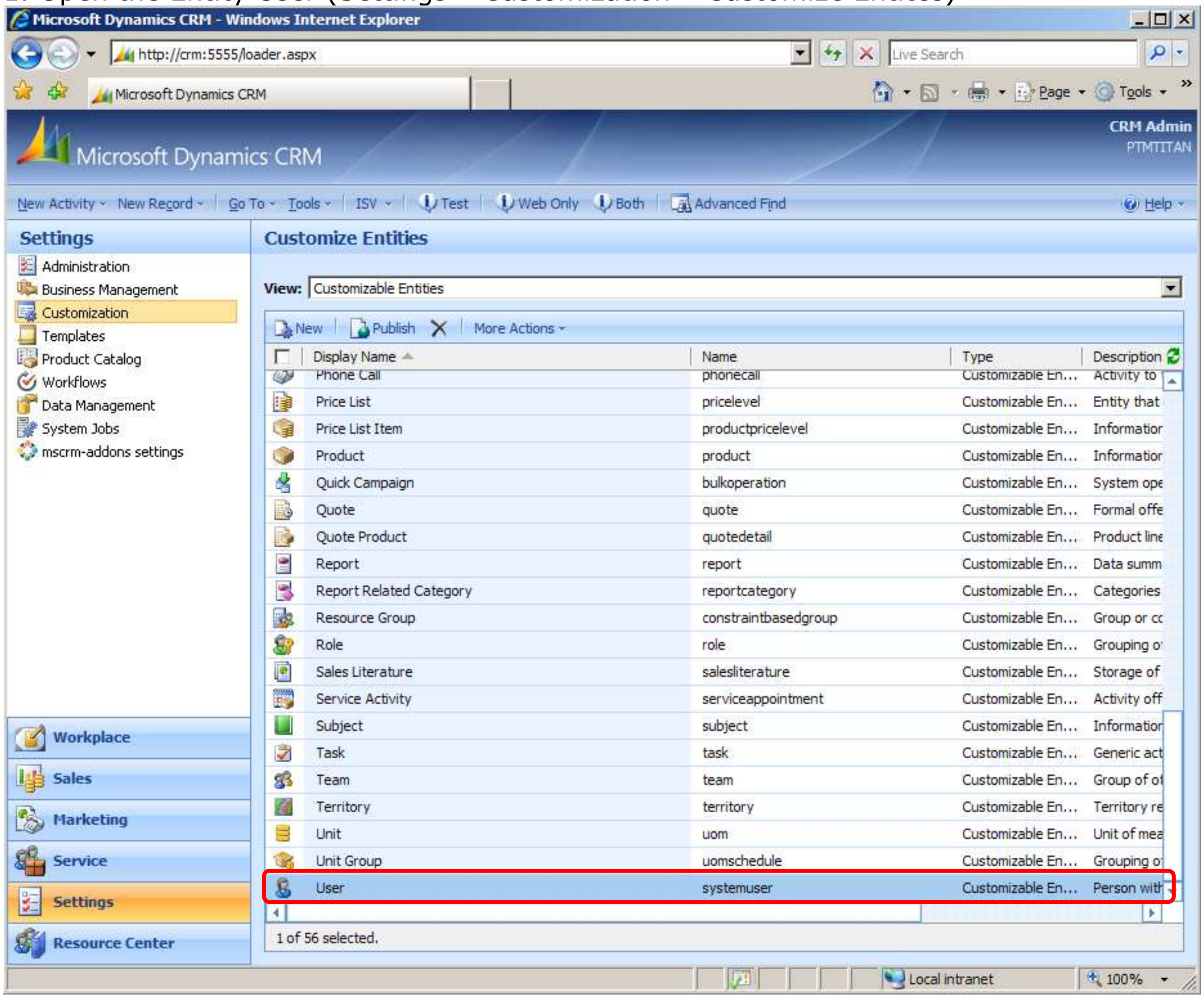
```
/*MSCRM-ADDONS.COM Do not change this lines!*/
if (window.location.search.match(/outgoing=false/))
{
    if (crmForm.all.directioncode.DataValue)
    {
       directioncode_onchange();
      crmForm.all.directioncode.DataValue = false;
    }
}
/*MSCRM-ADDONS.COM End*/
```



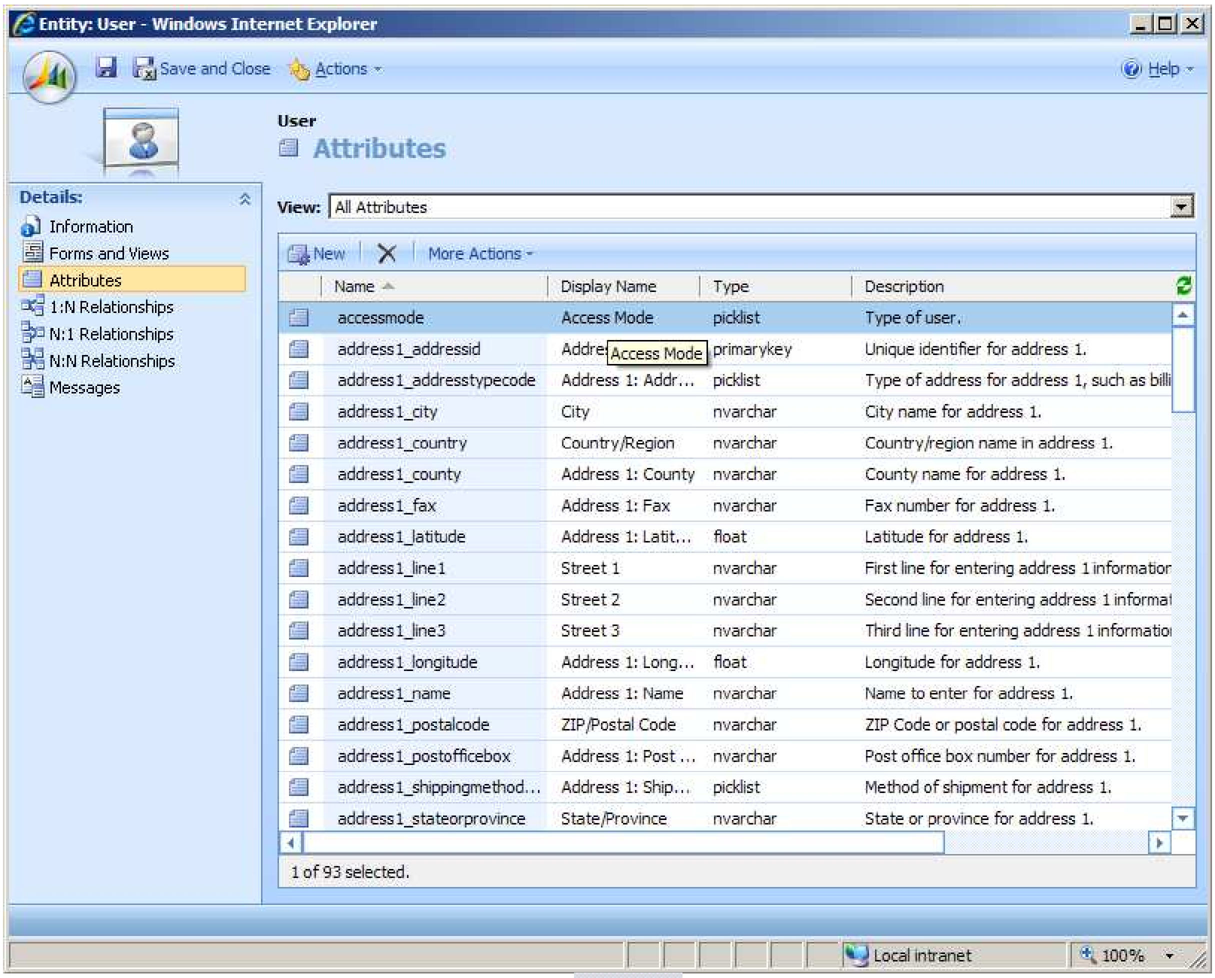
4 Per User licensing

If you want to use the Per User Licensing you have to add a new Attribute to the User-Entity. Afterwards you can set up which user will be able to use TI.

1. Open the Entity User (Settings – Customization – Customize Entites)

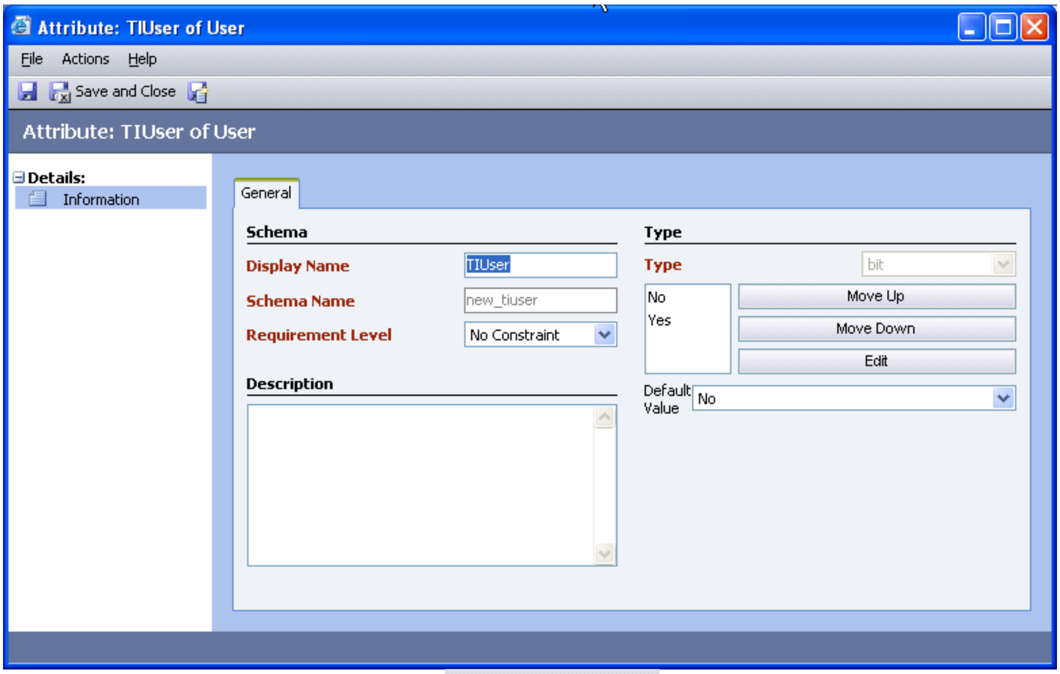


2. Click on Attributes



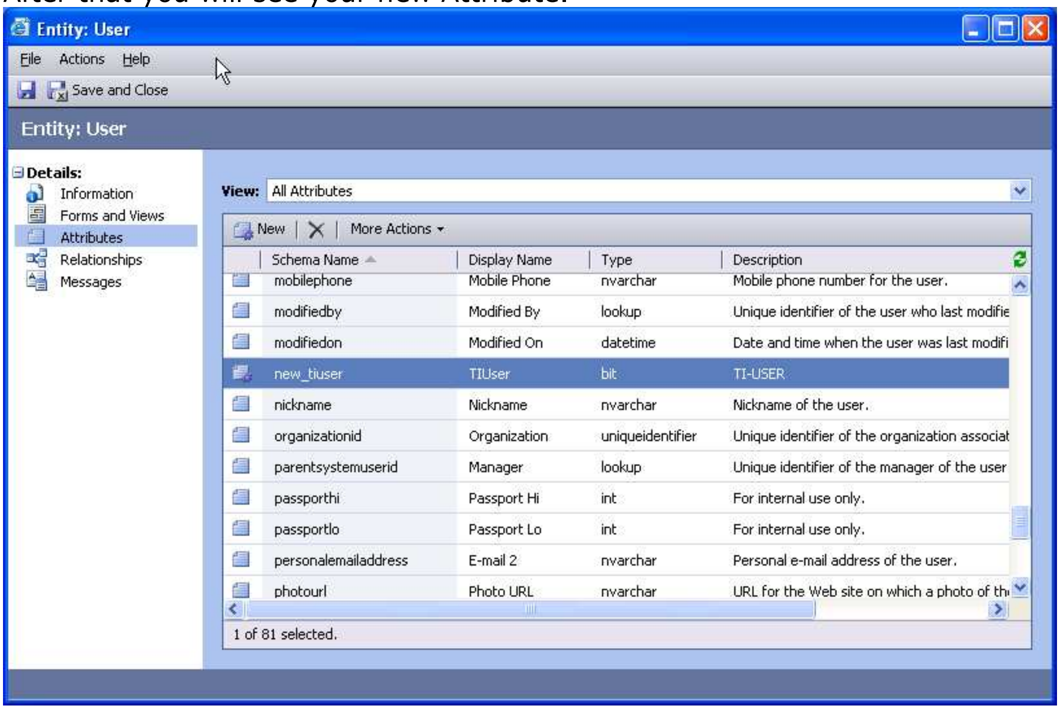
3. Now add a new Attribute by clicking on 

Please fill out this Form exactly as you seen on the following Screenshot.

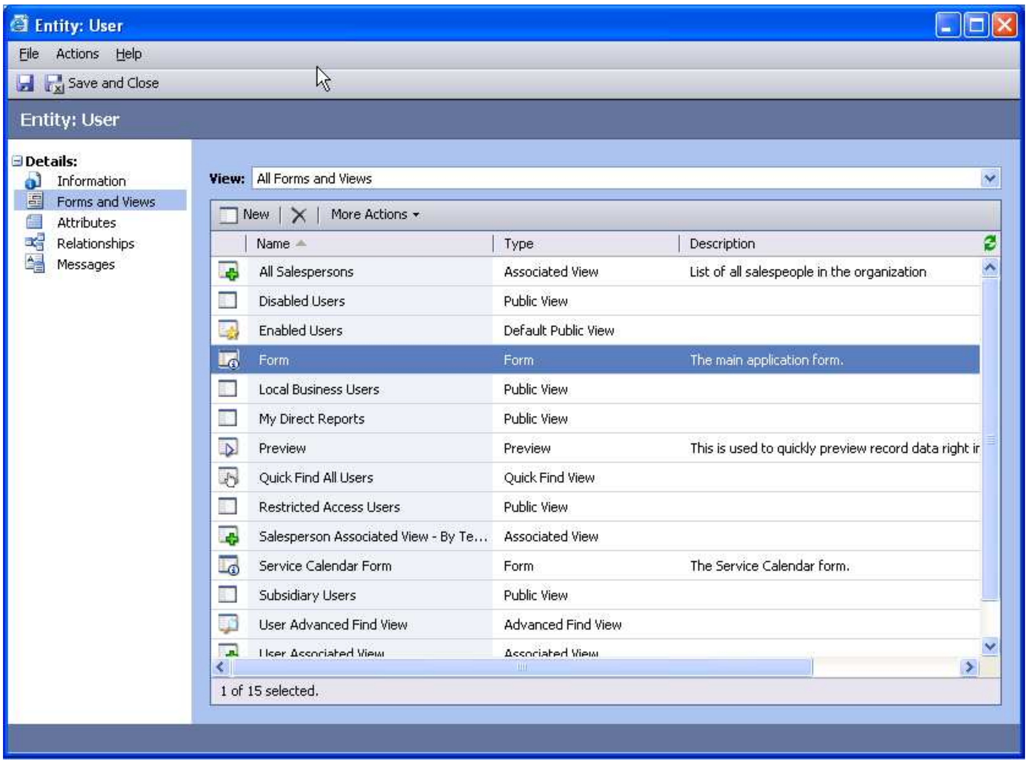


Close this window by clicking on 

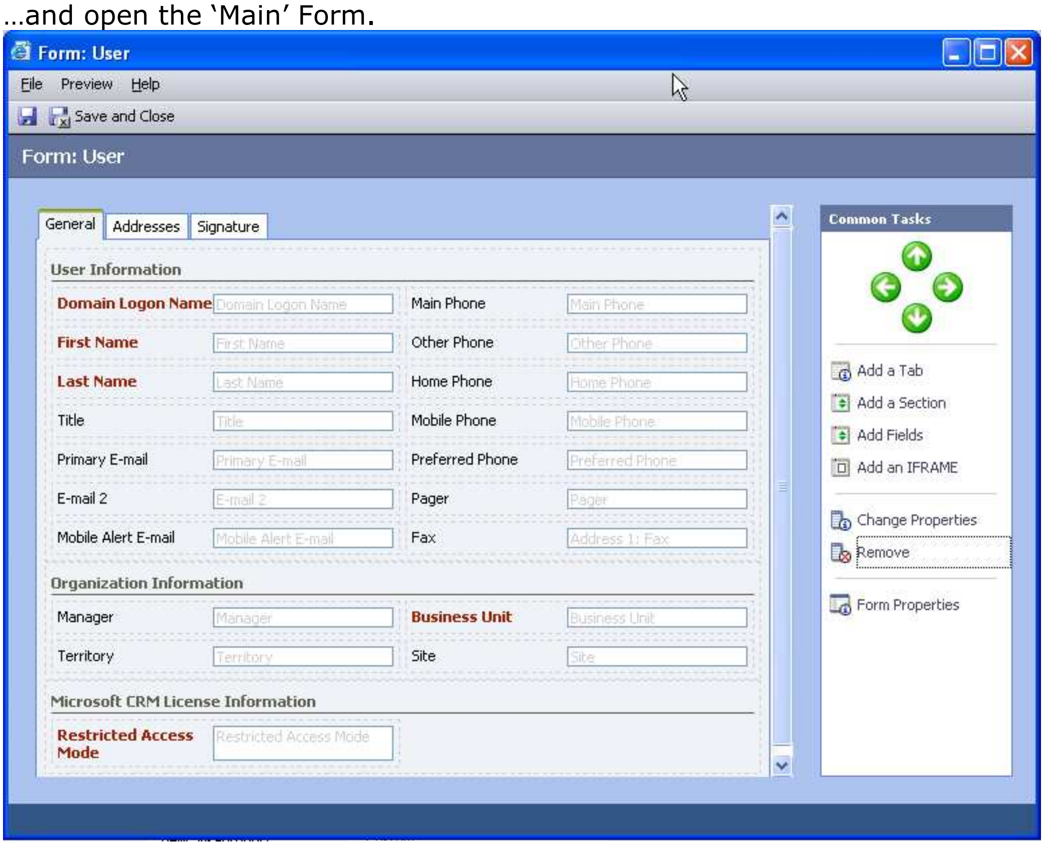
After that you will see your new Attribute.



Change to Forms and Views…

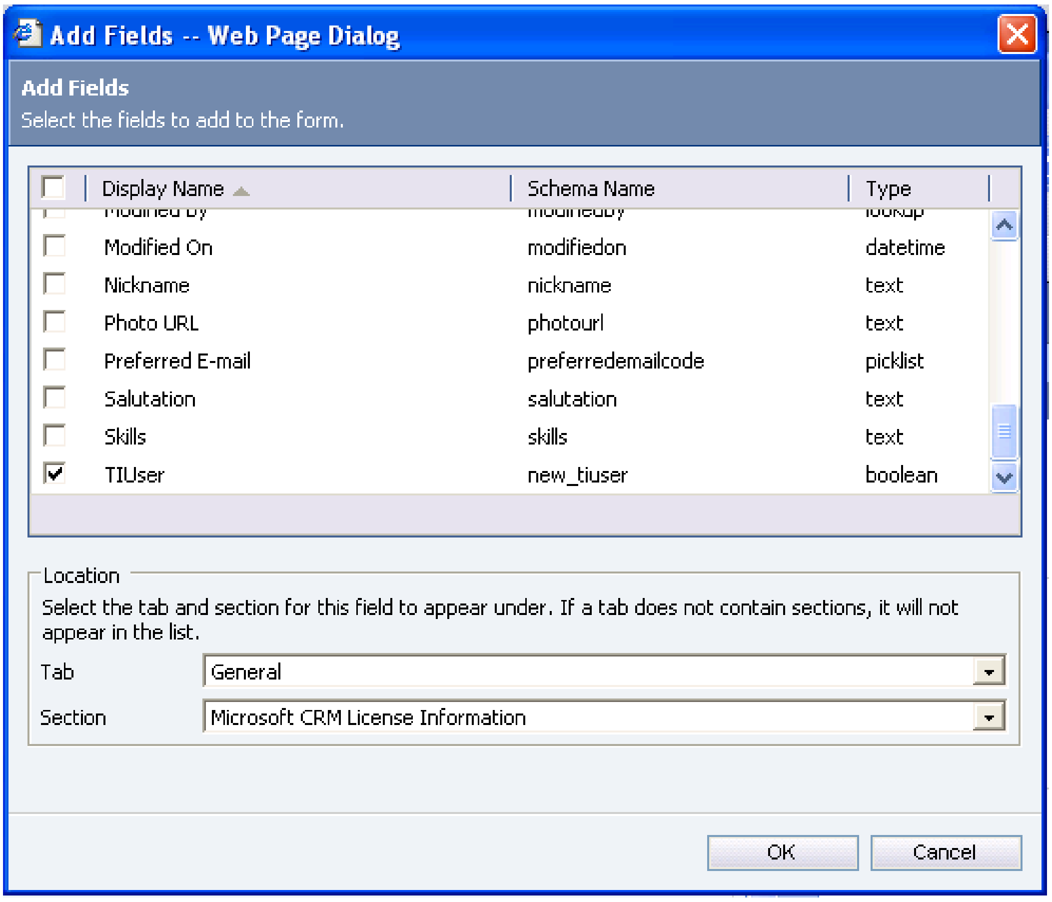


…and open the 'Main' Form.



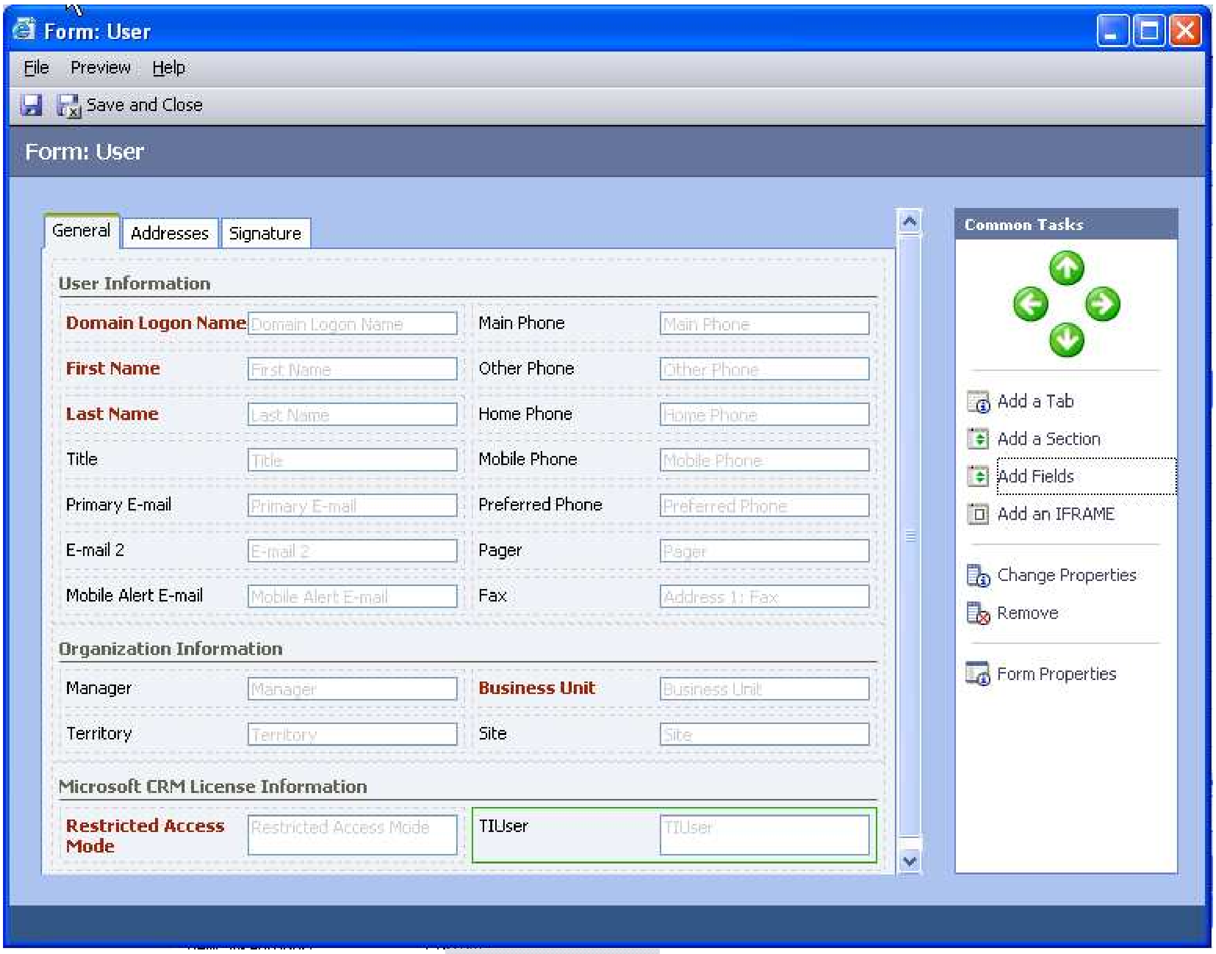
On the right side click on Add Fields

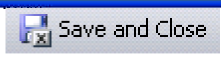
Scroll down to **TIUser**, check it and be sure that the Section 'Location' looks like the same as on this Screenshot.



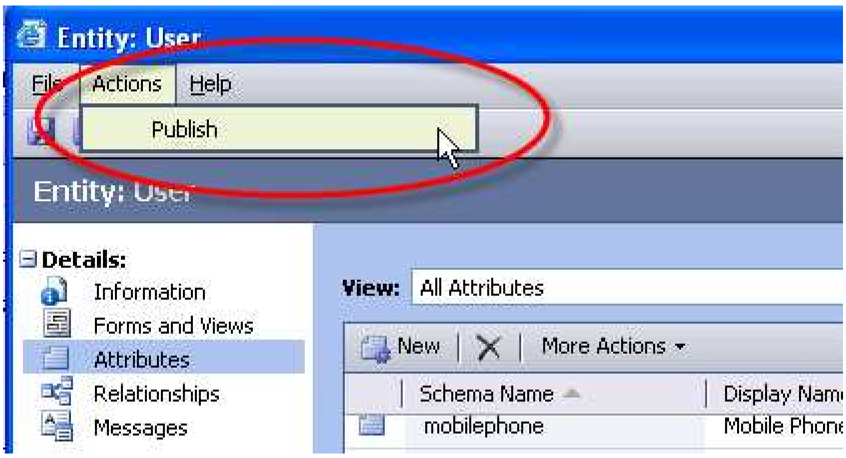
Press on [OK].

Now Your Main User Form should look like this:

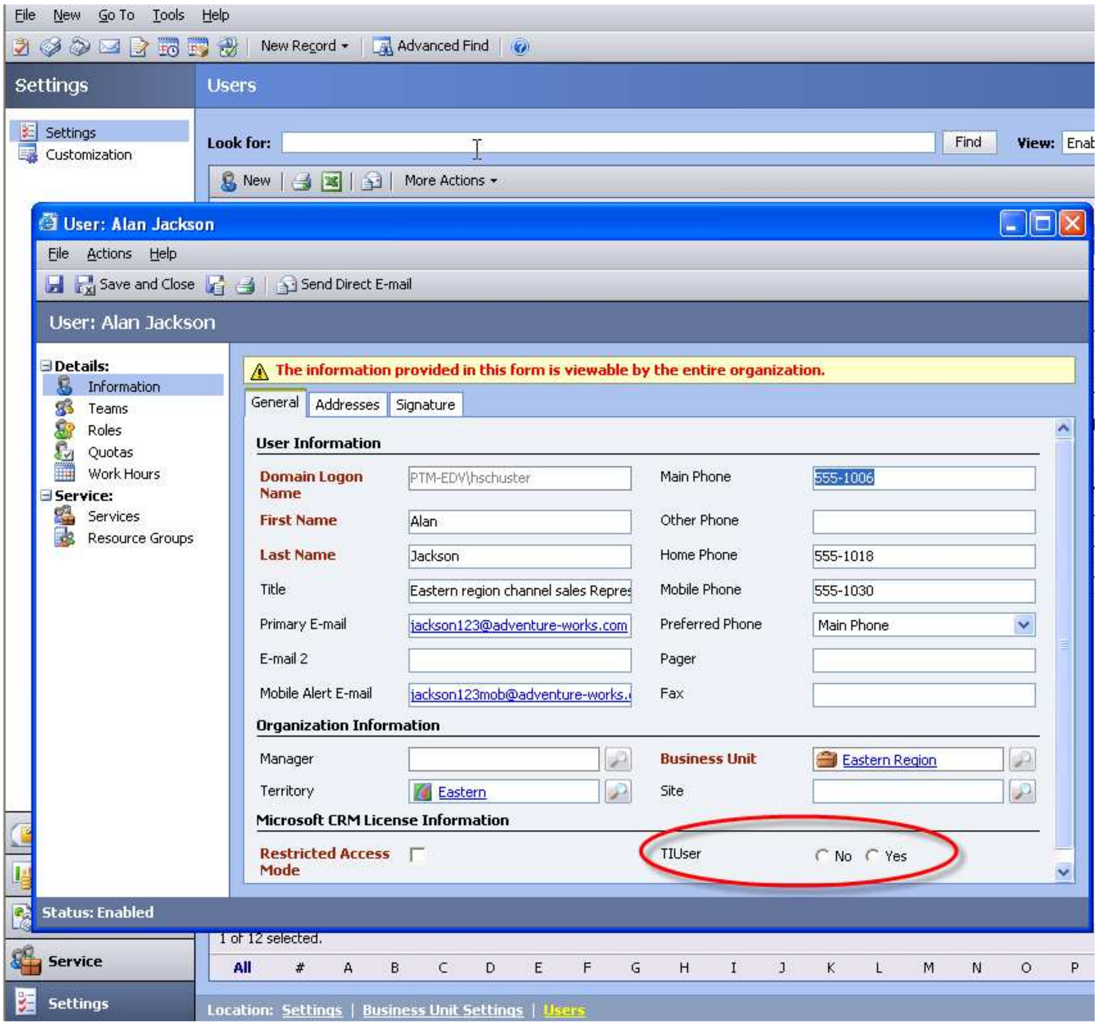


Close this window by clicking on 

To activate this new Attribute you have to Publish it.



Now you can set up which User will be able to use TI. Open the User Form (Settings – Settings – Business Unit Settings – Users) of an User you want to grant access to TI and set the new Attribute TIUser to YES.



5 Contact

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