# TelephoneIntegration Server for MS CRM 2015/2016 and Dynamics 365

v.1.2, Nov 2016

TelephoneIntegration Server
(How to install TelephoneIntegration Server for MS CRM 2015/2016 and Dynamics 365)

# Content

# Preamble

This documentation is intended to guide you through the Server installation of TelephoneIntegration Server for Microsoft Dynamics CRM 2015/2016 and 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 2015/2016 and Dynamics 365 who have the following minimum skills:

- Basic Microsoft Dynamics CRM/Dynamics 365 knowledge
- Maintaining and configuring IIS based Web Sites / Applications
- Maintaining and configuring a Microsoft CRM/Dynamics 365 Server

# Supported Web Browsers and versions

Supported Web Browsers:
- Internet Explorer 9 and higher
- Chrome
- Edge
- Firefox

Anyone 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 CRM must be available:
- Microsoft Dynamics CRM Server 2015/2016
- Microsoft Dynamics 365
- Microsoft Dynamics CRM Online

The RTM version of Microsoft .NET Framework 4.6.2 is required. Client Runtime is not sufficient. Microsoft Dynamics CRM 2015 RTM On Premise 5.0.9688.583 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 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 CRM 2015/2016 and Dynamics 365

TelephoneIntegration Server for Microsoft Dynamics CRM 2015/2016 and/or Dynamics 365 can be installed on any supported operating system which is able to connect to your CRM 2015/2016 and/or Dynamics 365 Server.

During the installation, you have to 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 in order to install and configure the TelephoneIntegration Server into another CRM 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 CRM 2015/2016/Dynamics 365*

Version 2016.103 works with Microsoft Dynamic 365 because it accesses the new CRM DLL library.
Version 2015.103 works with Microsoft Dynamics CRM 2015 and 2016. But there is no guarantee that it also works with Microsoft Dynamics 365

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

## 1.1   First steps

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

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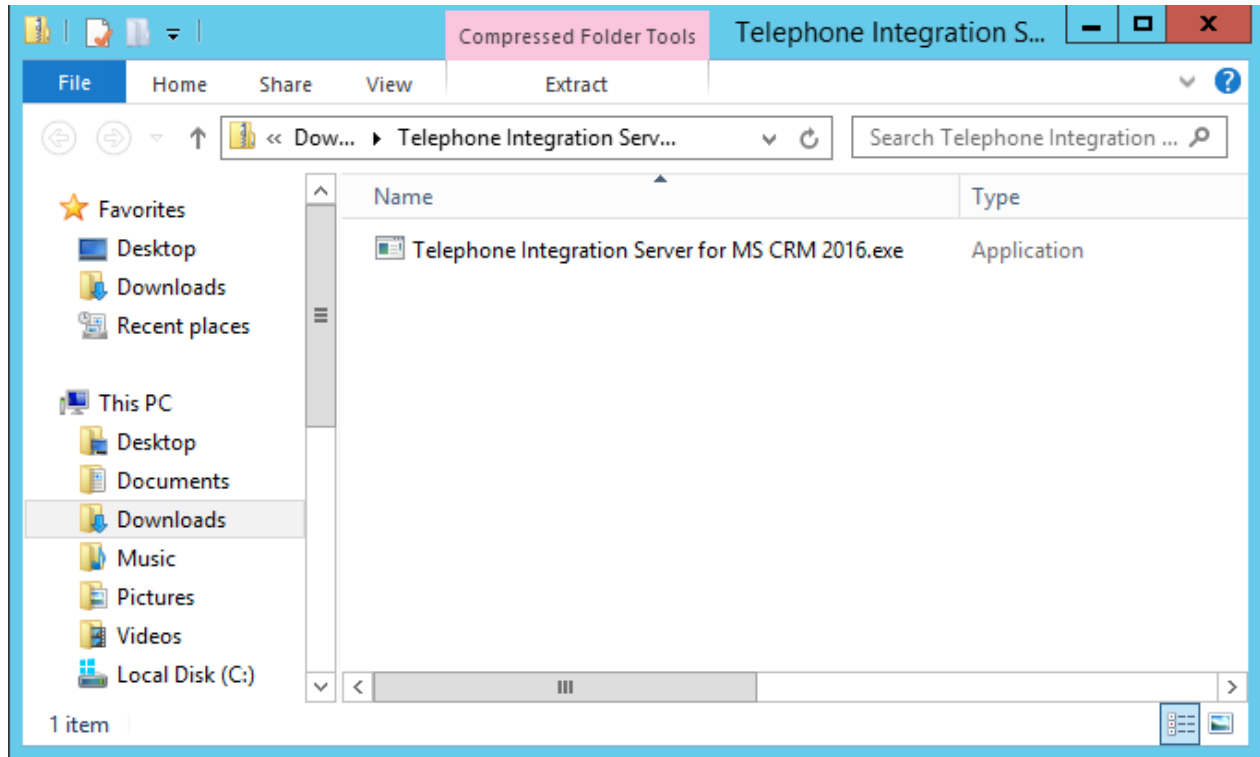


*Figure 2: TelephoneIntegration Server Setup file*

Now run the TelephoneIntegration Server Setup file.

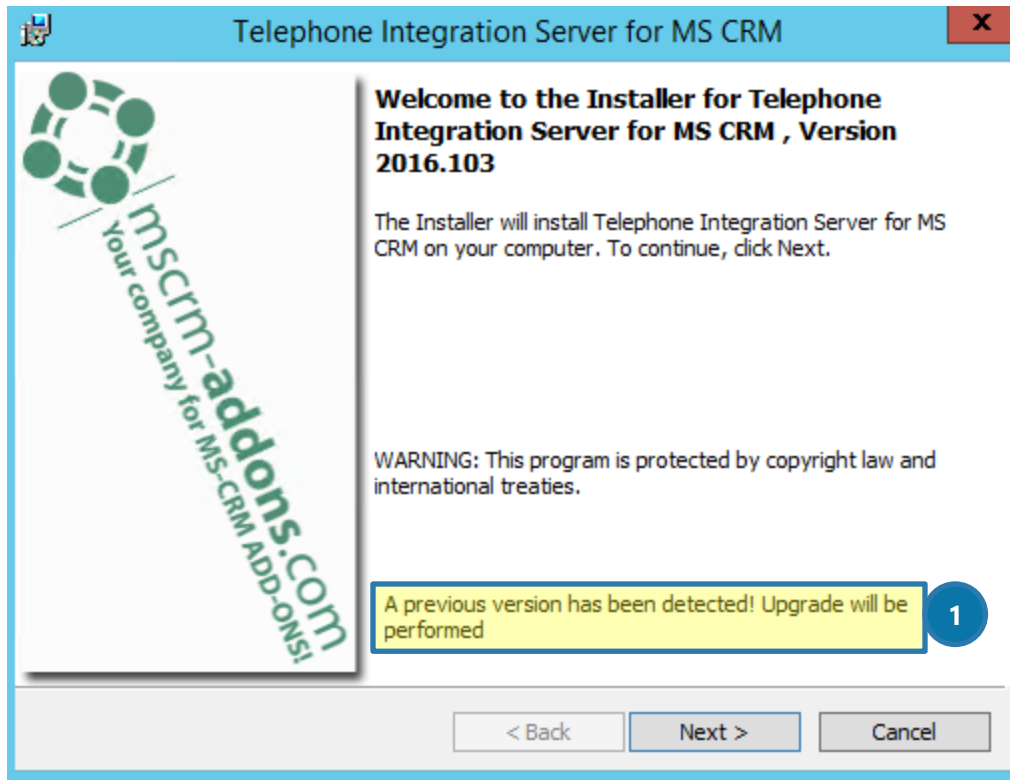The TelephoneIntegration Server Installation Wizard appears.



*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 9 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.
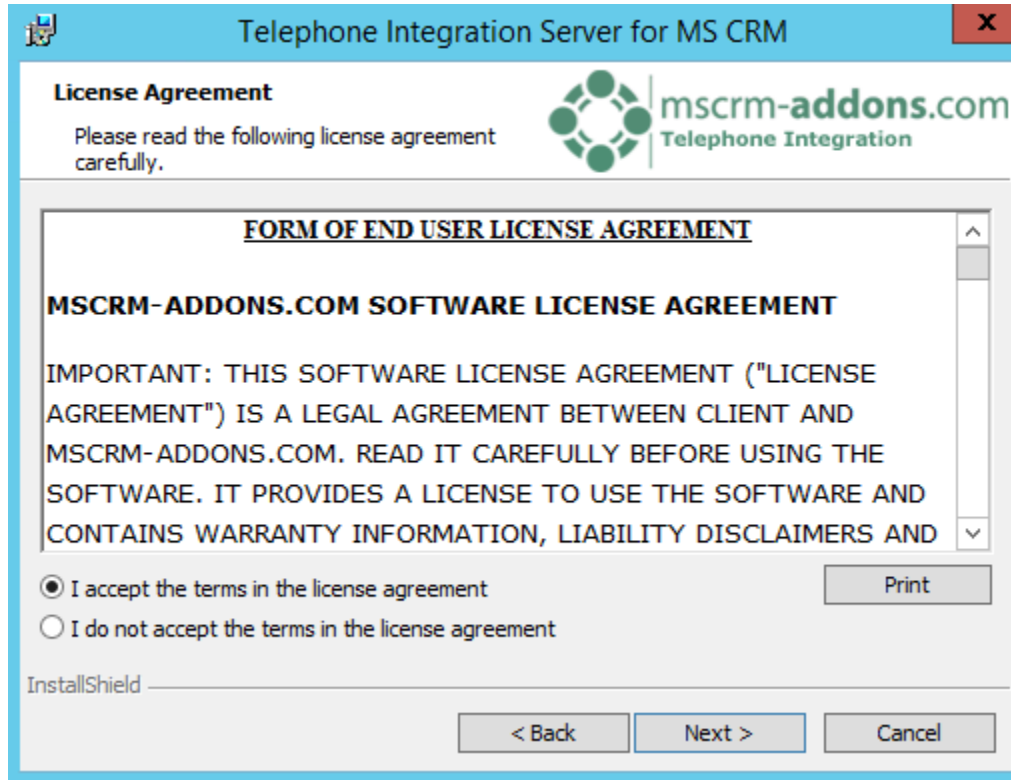Click on the *[Next]*-button to continue.



*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.
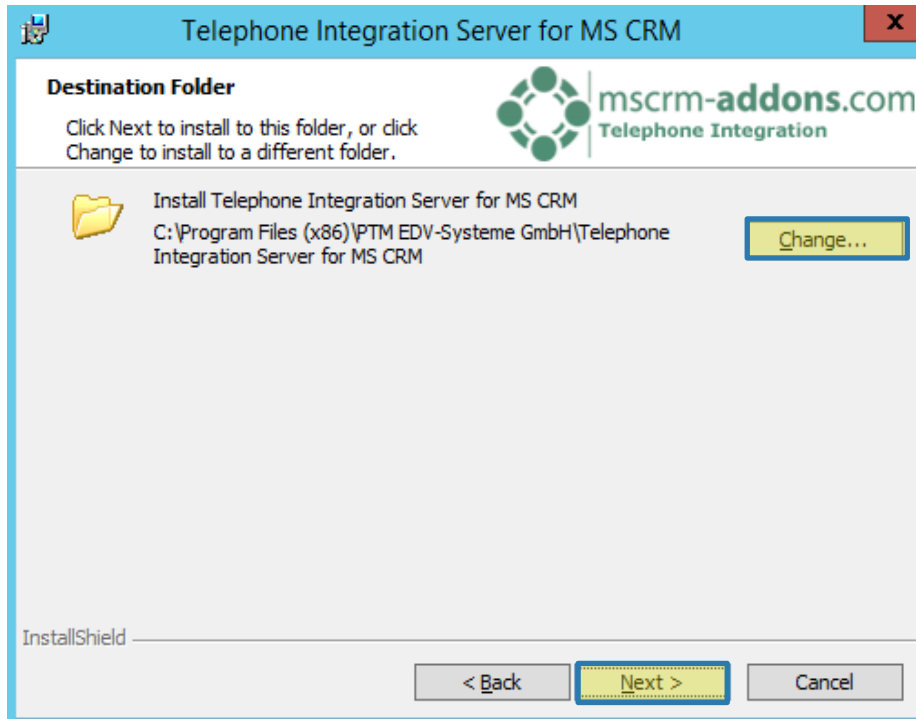


*Figure 5: Destination folder selection*

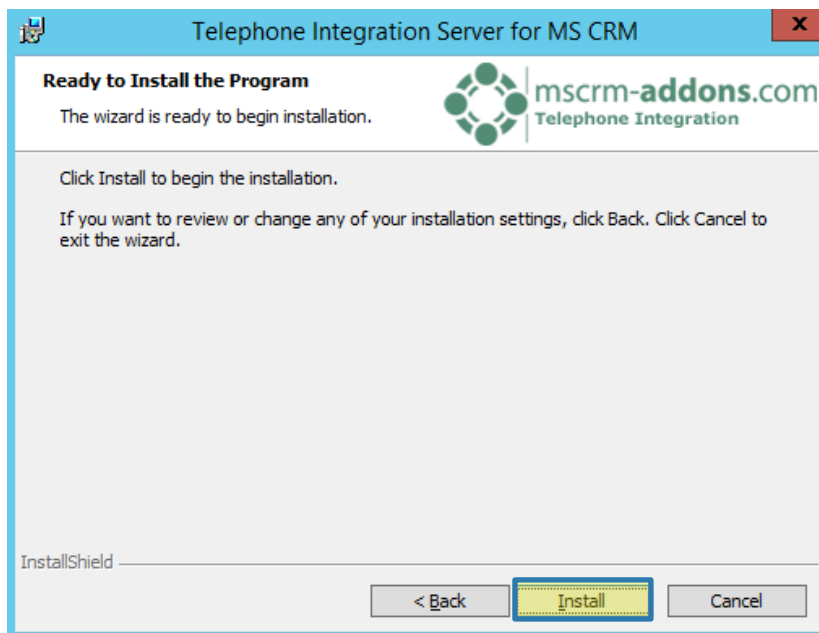In the next window, click on the **[Install]**-button to start the installation.



*Figure 6: Install the program*

TelephoneIntegration for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

Next, the TelephoneIntegration InstallShield Wizard installs TelephoneIntegration.

**PLEASE NOTE**      The installation may take several minutes. Enjoy your coffee!
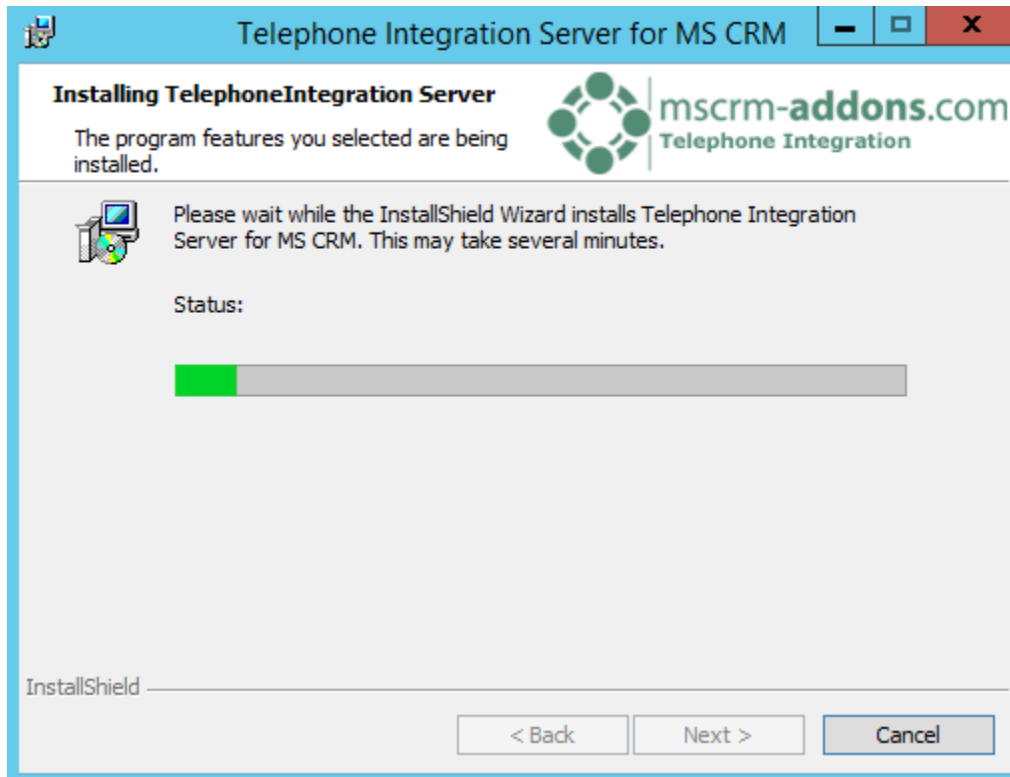


*Figure 7: Installing TelephoneIntegration Server*

## 1.4   CRM Connection setup

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

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



*Figure 8: CRM Connection setup blank*

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



*Figure 9: CRM Connection setup filled*

For further information on the Connection Dialog, 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 set up 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 2.2 HOW TO LAUNCH THE CONFIG OF TELEPHONEINTEGRATION SERVER ON PAGE 16 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.
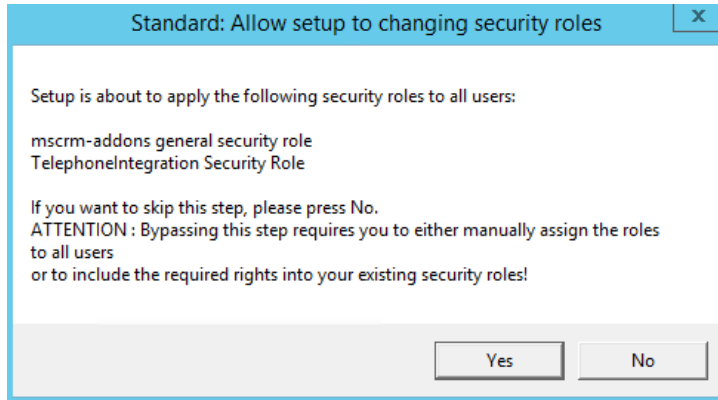


*Figure 10: Security roles setup*

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

PLEASE NOTE    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.
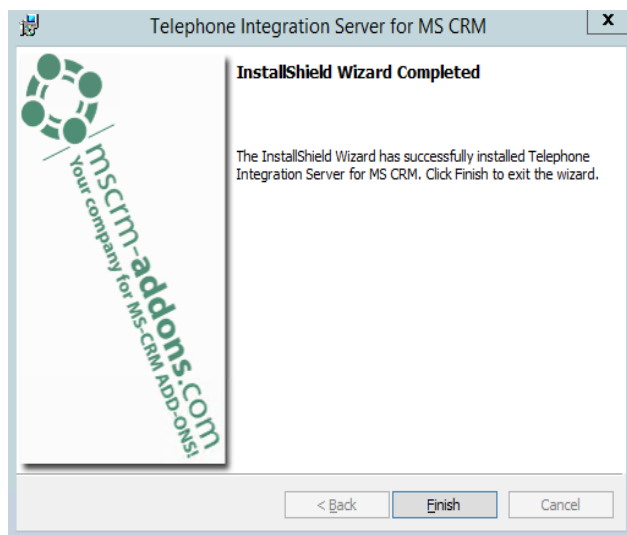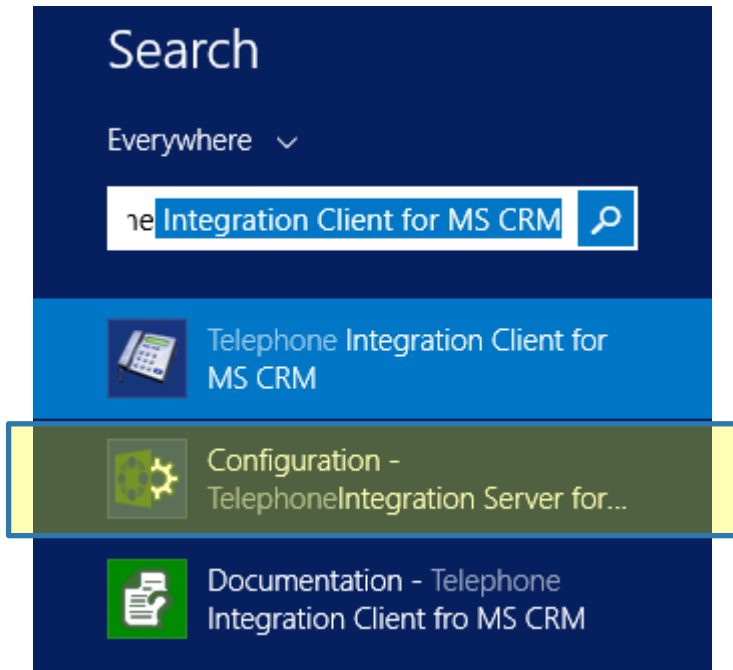


*Figure 11: Finish the TelephoneIntegration installation*

# 2  The TelephoneIntegration Organization Overview

The TelephoneIntegration for Microsoft Dynamics CRM 2015/2016 and Dynamics 365 Configuration allows you to select the entities that are used by the TelephoneIntegration Client in order to search for numbers on incoming calls and to activate the dial-out option.

To work with the TelephoneIntegration Organization Overview, search for
*Configuration – TelephoneIntegration Server for MS CRM* in the Windows Start Pane and press enter.



*Figure 12: 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 CRM CONNECTION SETUP ON PAGE 11.

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.

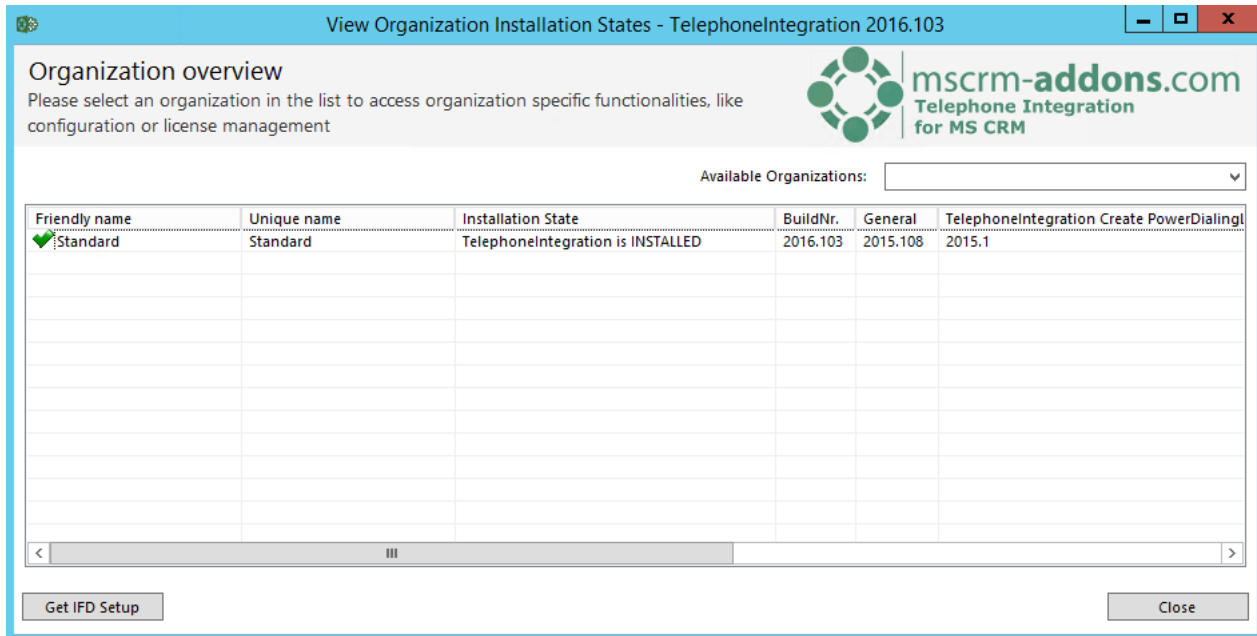Next, the License Manager appears. Please select your organization here.



*Figure 13: License Manager*

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 configured.

**PLEASE NOTE**      Another possibility to open the *LicenseManager* is to look for *LicenseManager – TelephoneIntegration* in the StartPane and to hit *Enter* to start the program.
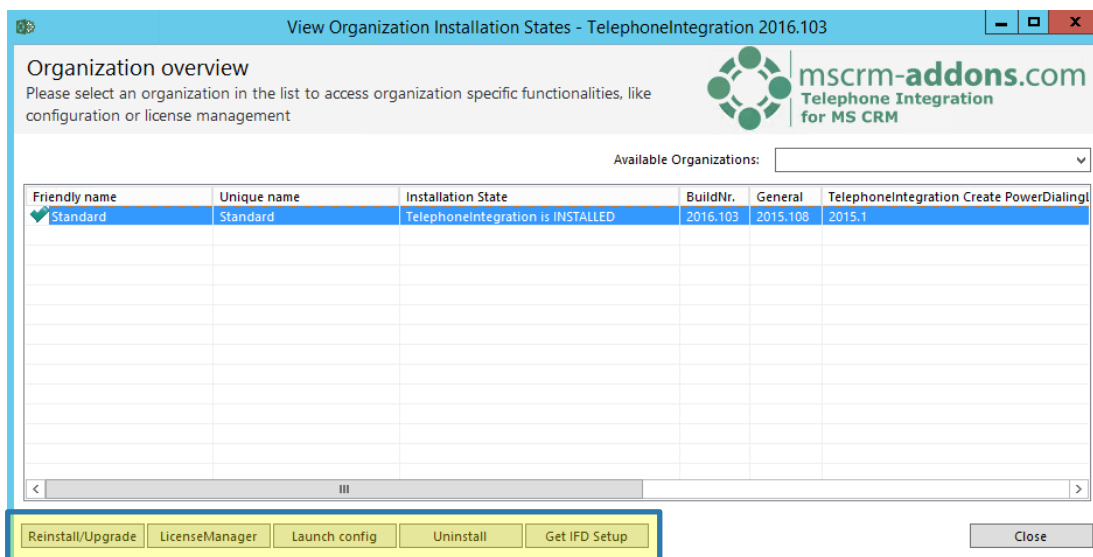


*Figure 14: License Manager with specific buttons*

## 2.1   How to reinstall/upgrade TelephoneIntegration Server

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

## 2.2   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 in the course of the next chapters.

### 2.2.1   Crm Ribbon - tab

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



*Figure 15: TelephoneIntegration Server Config-window*

## ❶ 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.

## ❷ 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 16: 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.

STATUSCODEVALUES

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

**❸** THE [OK]-BUTTON

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

**❹** THE [CHANGE CONNECTION]-BUTTON

Click on the *[Change Connection]*-button in order 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.

## 2.2.2 The Advanced-tab

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



*Figure 17: The Advanced-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 *CampaignActivity* Entity in CRM/Dynamics 365 with additional fields for the PowerDialing features of the mscrm-addons.com CTI.

**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.

## 2.2.3  The IndexService-tab

This tab provides you with the possibility to rebuild 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. For instance, in 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.
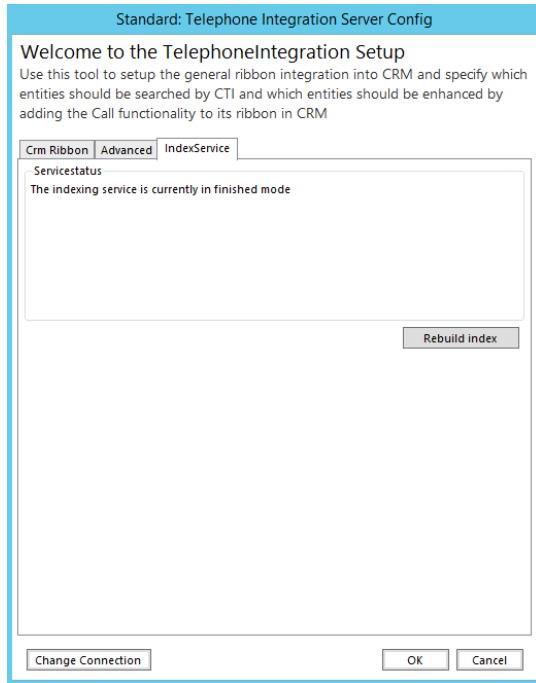
*Figure 18: The IndexService-tab*

Click on the **[Rebuild Index]**-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   TelephoneIntegration Overview Dashboard

Importing the Telephone Integration solution into a CRM/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 CRM/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

# Telephone Integration Overview ˅



Figure 19: TelephoneIntegration dashboard overview

# 4 Uninstall

To uninstall TelephoneIntegration Server for MS CRM 2015/2016/Dynamics 365, please look for *Programs and Features* in the Control Panel.
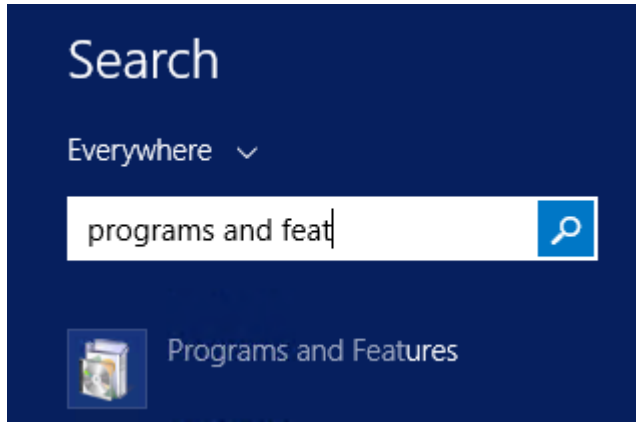


*Figure 20: Control Panel – Programs and Features*

Look for TelephoneIntegration Server CRM 2015/2016 in "Uninstall or change a program" to uninstall the TelephoneIntegration Server. Follow the Instructions in order to uninstall the TelephoneIntegration Server.
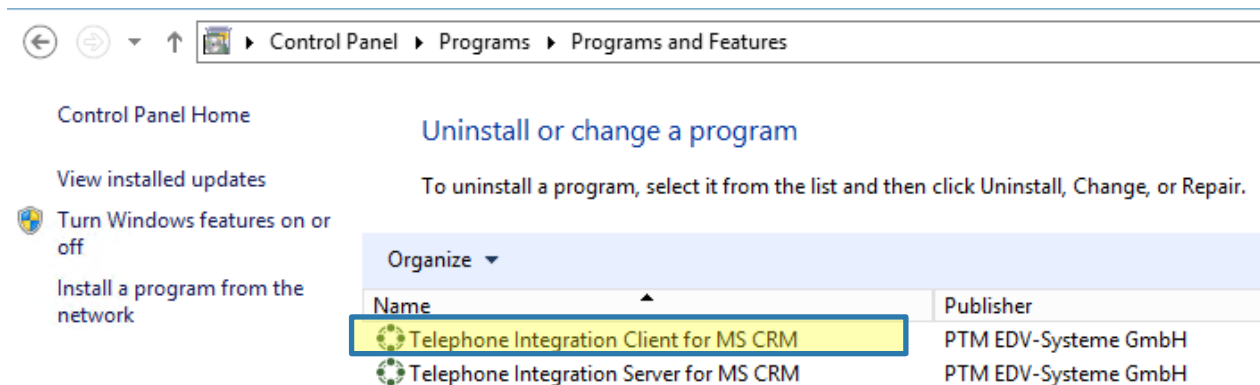


*Figure 21: Control Panel – Uninstall TI*

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.

# 5 List of figures

# 6   Contact

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

For sales and licensing questions please contact office@mscrm-addons.com, or the corresponding contact information below.



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