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

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v.1.2, Nov 2016

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

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## 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.

## Download TelephoneIntegration for MS CRM 2015 / 2016 / Dynamics 365



Below you can download CRM 2015, CRM 2016 and Dynamics 365 compatible versions of our addons.

**Need Help?:** If you run into troubles when installing/configuring our solutions dont hesitate to get in touch with us via our [Help-Center](#).

### Installer

Title	Category	Modified Date	Size	
TelephoneIntegration Server for MS CRM 2016 / Dynamics 365	v2016.103	11/8/2016	27.41 MB	<a href="#">Download</a>
TelephoneIntegration Server for MS CRM 2015 / CRM 2016	v2015.103	11/21/2016	27.24 MB	<a href="#">Download</a>



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 **1**.

## 1.1 First steps

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



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

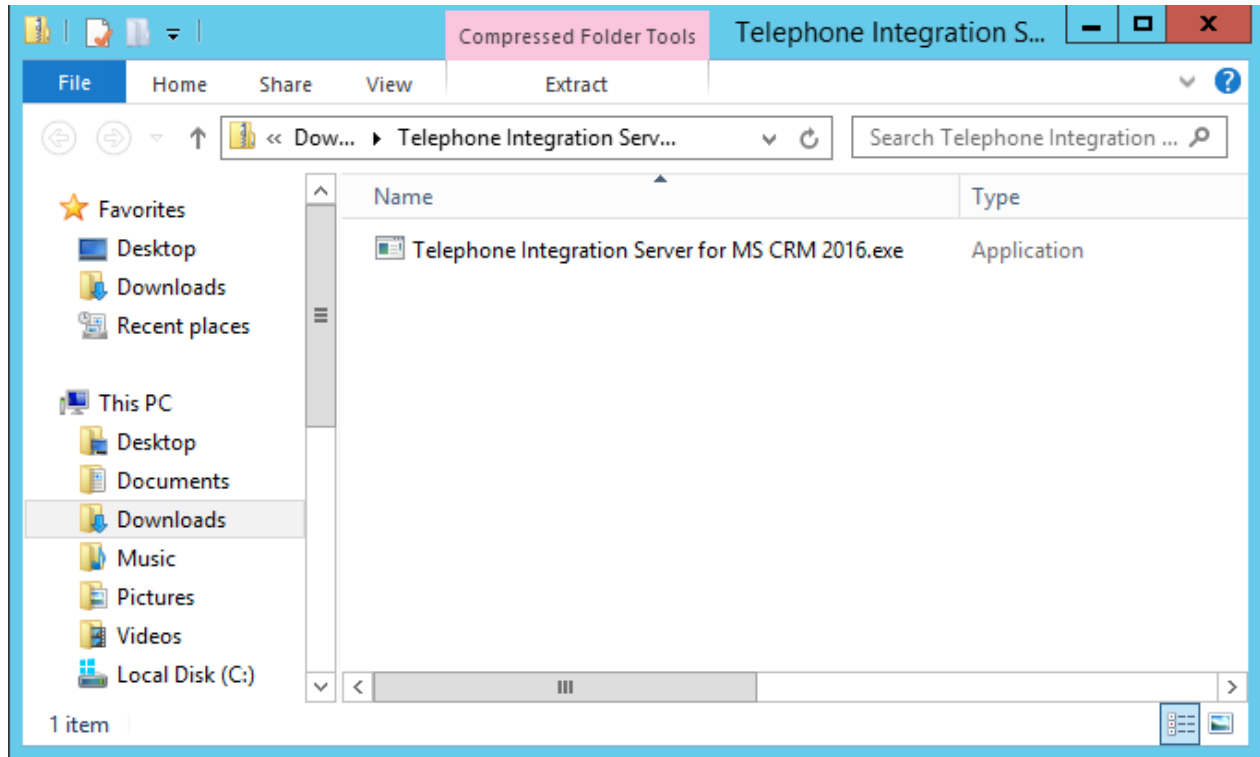


Figure 2: TelephoneIntegration Server Setup file

Now run the TelephoneIntegration Server Setup file.

The TelephoneIntegration Server Installation Wizard appears.

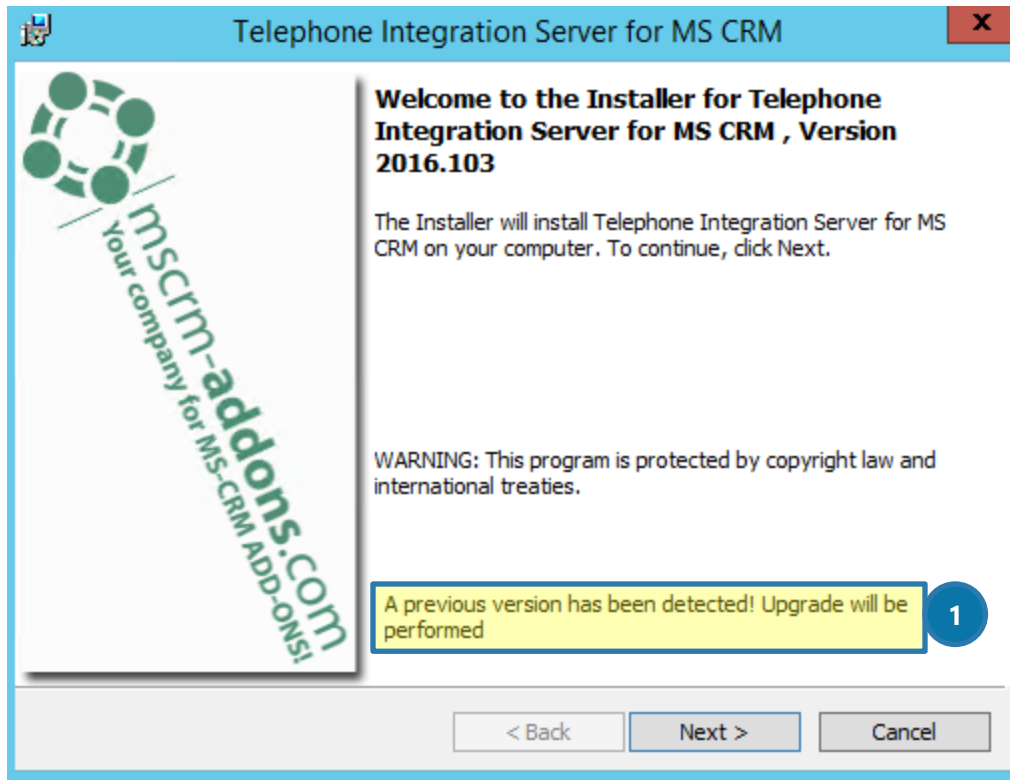


Figure 3: TelephoneIntegration Server Installation Wizard



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 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.

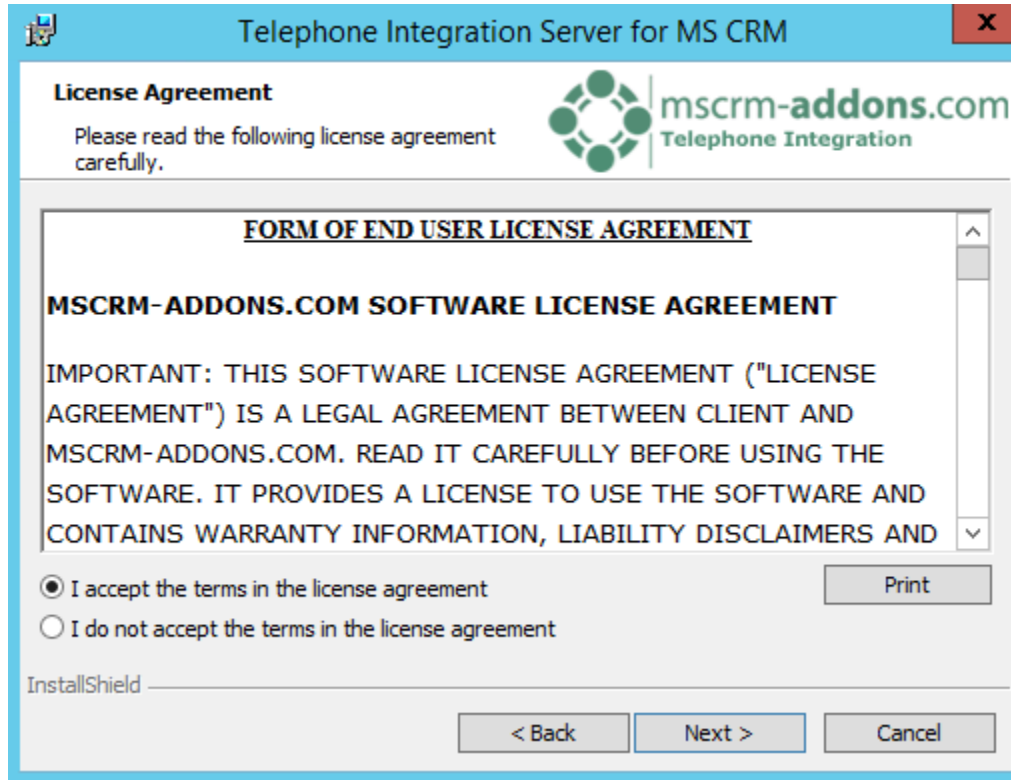


Figure 4: EULA (End User License Agreement)



### 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.

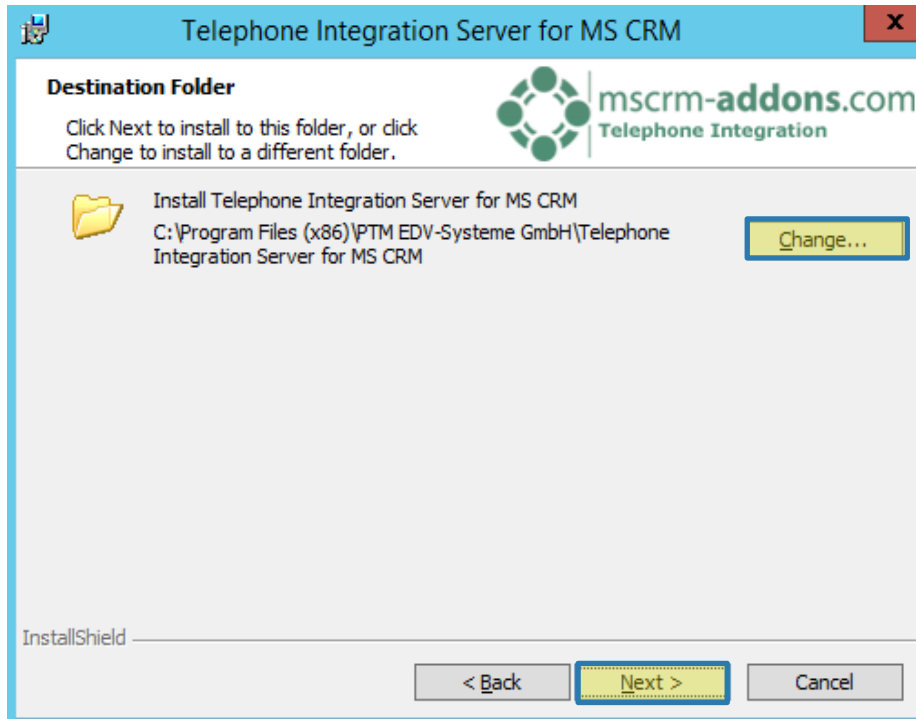


Figure 5: Destination folder selection

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

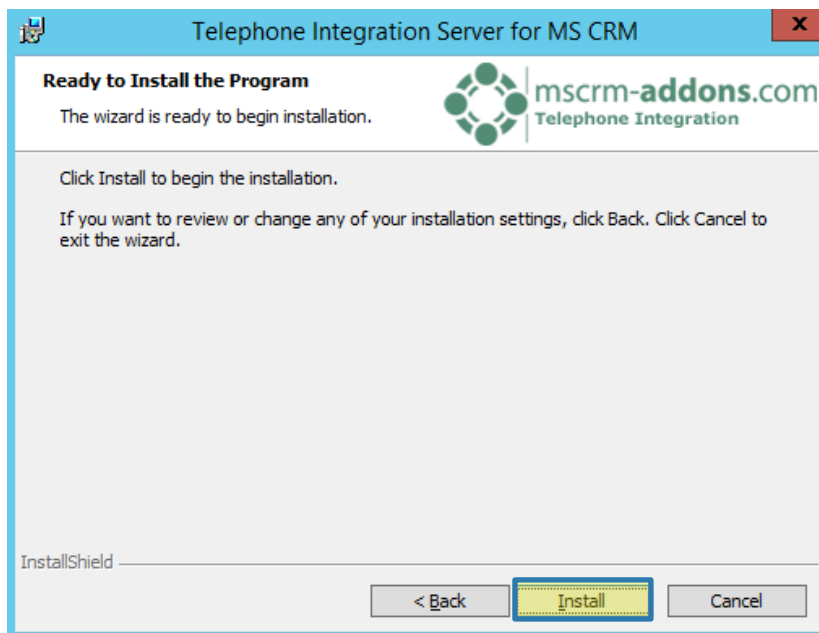


Figure 6: Install the program

TelephoneIntegration for Microsoft Dynamics CRM 2015/2016 and Dynamics 365

Next, the TelephoneIntegration InstallShield Wizard installs TelephoneIntegration.



The installation may take several minutes. Enjoy your coffee!

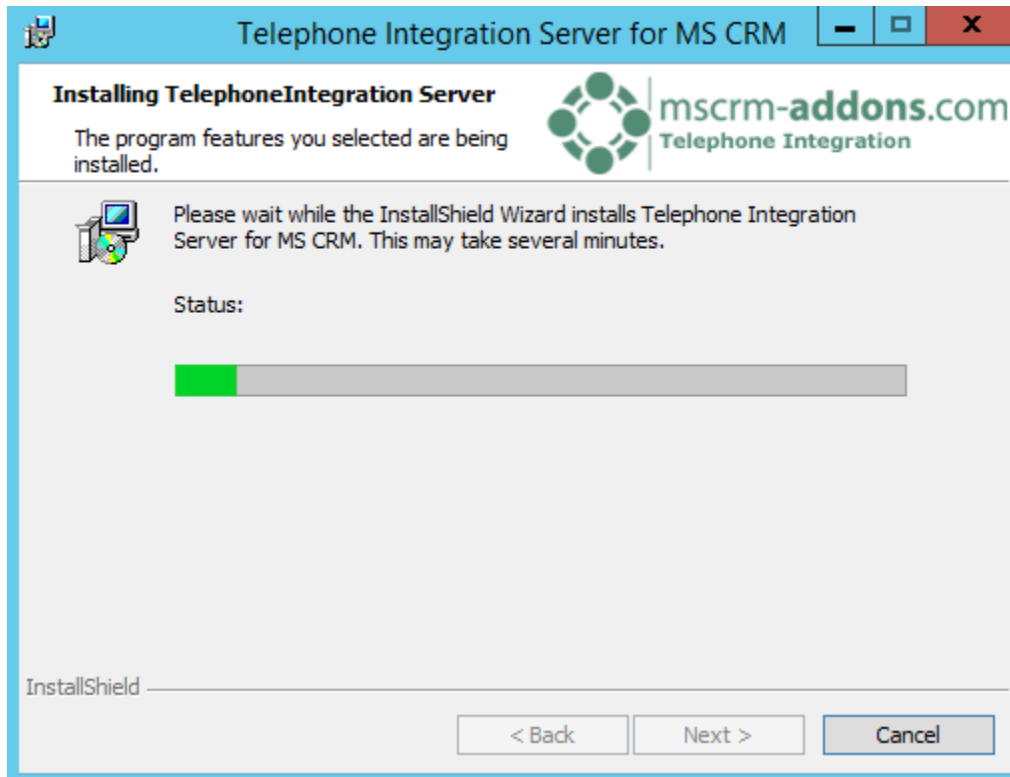


Figure 7: Installing TelephoneIntegration Server

## 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 **1**, password **2** and domain **3**.

The screenshot shows the 'Logon information' dialog box for CRM Connection setup. It includes a 'Welcome to your CRM Connection setup.' message and instructions. The dialog has tabs for 'CRM Connection', 'Advanced Settings', and 'Log'. It features an 'Existing Profiles' dropdown and a 'Manage' button. Under 'Select your Crm Type', there are radio buttons for 'Standard (onPremise)', 'IFD (Hosted)', and 'Crm Online'. The 'CRM Server-Url' field has a dropdown menu set to 'http://'. The 'Authenticated as' section has a checked box for 'Use default Credential: Not enough information to retrieve organizations' and input fields for 'Username' (marked with a blue circle '1'), 'Domain' (marked with a blue circle '2'), and 'Password' (marked with a blue circle '3'). A 'Retrieve all Organizations' button is located below these fields. At the bottom, there is a 'Reset LiveID Cache' button and 'OK' and 'Cancel' buttons.

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.

Logon information

Welcome to your CRM Connection setup.  
Please specify your connection details to connect to CRM. If you do not know the connection details, please contact your system administrator

CRM Connection | Advanced Settings | Log

Existing Profiles: [HKLM] crm:5555 - Standard [Manage]

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

CRM Server-Url:  
http:// crm:5555 ✓

Authenticated as:  
 Use default Credential crmtest0\administrator

Username: administrator Domain: crmtest0 Password: ●●●●●●

**Retrieve all Organizations**

Organization information:

Friendly name	Unique name	ServiceURL
Standard	Standard	Standard
PTM EDV System...	PTMEDVSystemeG...	PTMEDVSystemeGmbH
crm2016	crm2016	crm2016

Reset LiveID Cache [OK] [Cancel]

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.

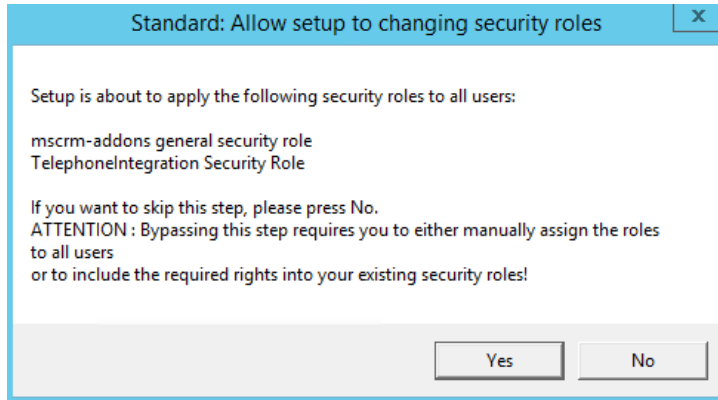


Figure 10: Security roles setup

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.



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.

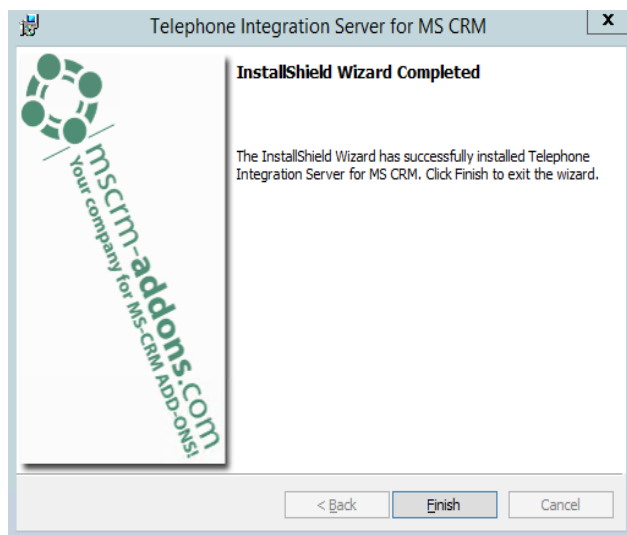
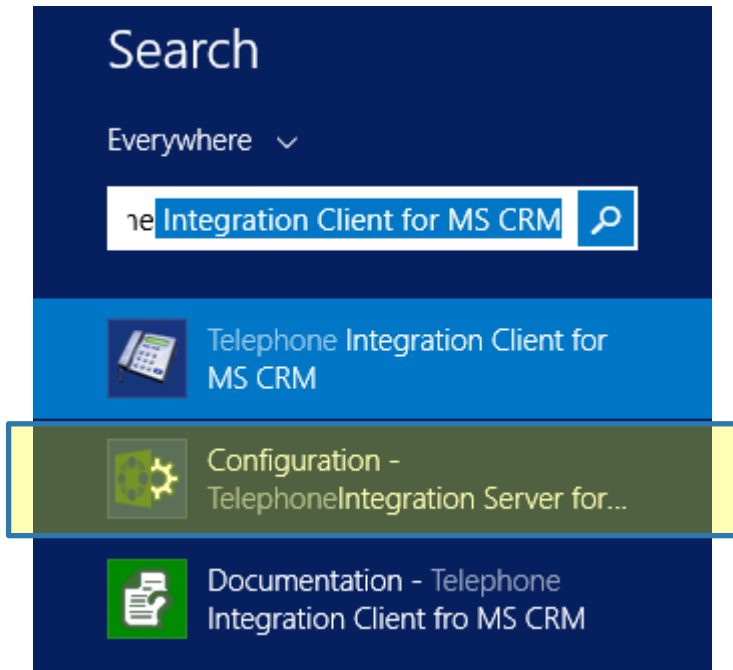


Figure 11: Finish the TelephoneIntegration installation

## 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.

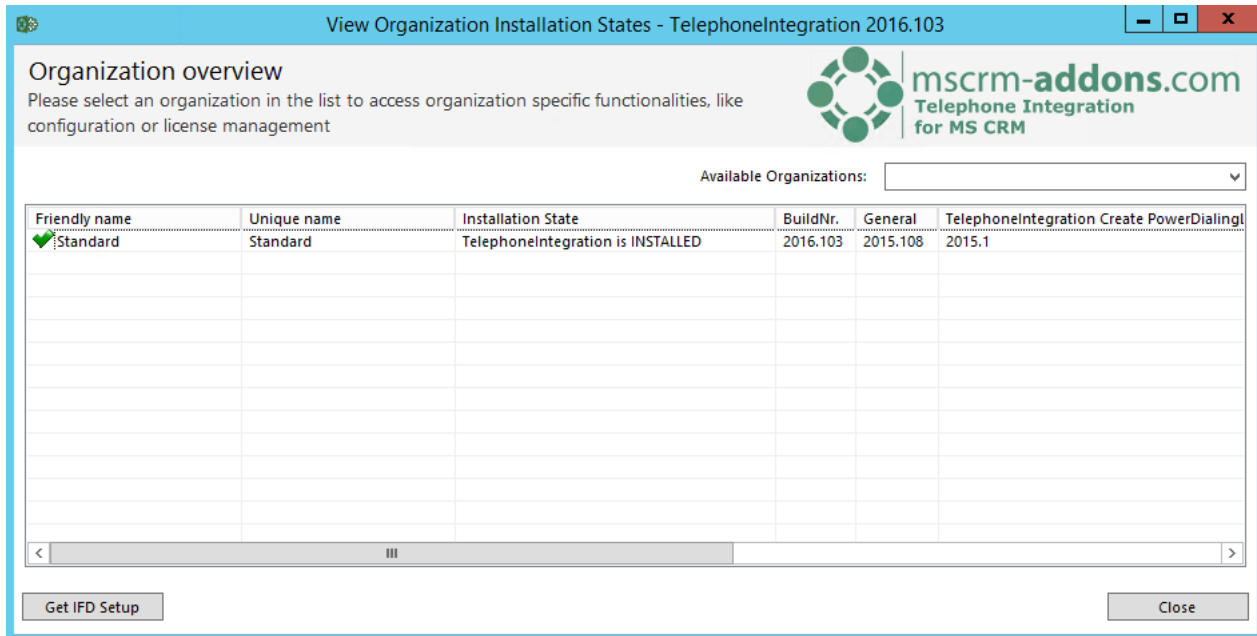


Figure 13: License Manager

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.



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

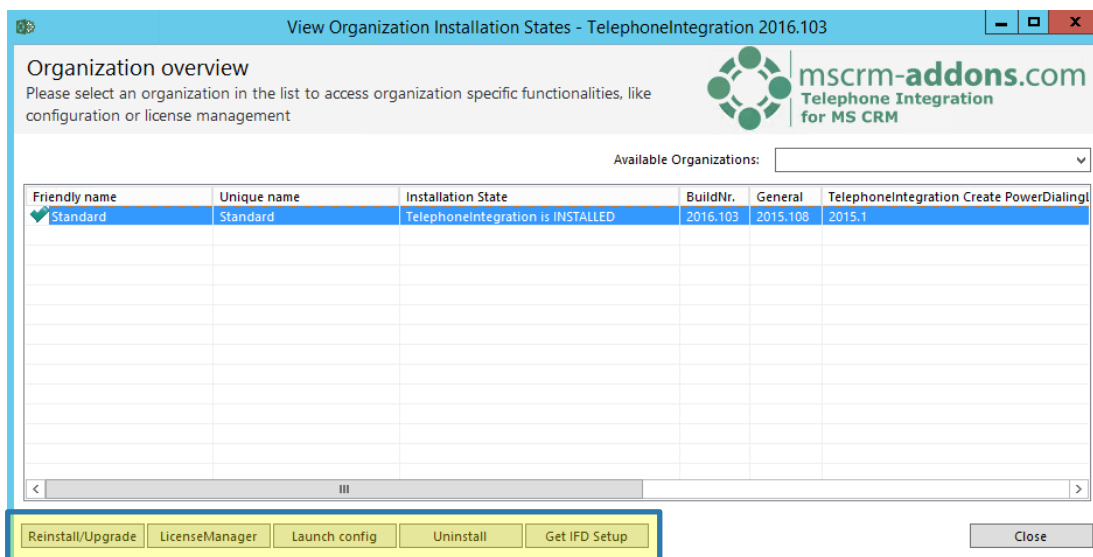


Figure 14: License Manager with specific buttons

## 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.

Standard: Telephone Integration Server Config

Welcome to the TelephoneIntegration Setup  
Use this tool to setup the general ribbon integration into CRM and specify which entities should be searched by CTI and which entities should be enhanced by adding the Call functionality to its ribbon in CRM

Crm Ribbon | Advanced | IndexService

Ribbon Integration Options

Callbutton: Call Number (1)

Enable number selection from ribbon

Entity Configuration

Display Name	Select	View
Account	<input checked="" type="checkbox"/>	
Address	<input type="checkbox"/>	
Auto Numbering Definition	<input type="checkbox"/>	
Auto Numbering Request	<input type="checkbox"/>	
Bing Map Lookup	<input type="checkbox"/>	
Bookable Resource	<input type="checkbox"/>	
Bookable Resource Booking	<input type="checkbox"/>	
Bookable Resource Booking Header	<input type="checkbox"/>	
Bookable Resource Category	<input type="checkbox"/>	
Bookable Resource Category Assn	<input type="checkbox"/>	
Bookable Resource Characteristic	<input type="checkbox"/>	
Bookable Resource Group	<input type="checkbox"/>	
Booking Status	<input type="checkbox"/>	
Bool Parse Request	<input type="checkbox"/>	

Change Connection (4) | OK | Cancel (3)

Figure 15: 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.

Select fields for Entity:Account  
Specify the details on how this entity should be treated:

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

Search in this Entity on incoming calls  
 Activate dialing out on this entity

Available Fields

Attribute Name	Phone#	Details	Call Title
(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) Created By (External Party)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Currency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Last SLA applied	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(LU) Licence for account	<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) Modified By (External Party)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Status:Code Values:  
 Active  
 Inactive

Supply custom FetchXML      OK      Cancel

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.

### 3 THE [OK]-BUTTON

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

### 4 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.

Standard: Telephone Integration Server Config

Welcome to the TelephoneIntegration Setup  
Use this tool to setup the general ribbon integration into CRM and specify which entities should be searched by CTI and which entities should be enhanced by adding the Call functionality to its ribbon in CRM

Crm Ribbon | **Advanced** | IndexService

Call History options

Organization owned **1**  User Owned  
All users in the same Organization can view the Call history  
Only the owner can view the Call history in CRM

Lync Chat options

Account : Save SIP  **2**

Contact : Save SIP into

Lead : Save SIP into

Power Dialer options

Enable **3**  
Enabling this feature will enhance the CampaignActivity Entity in CRM with additional fields for the power dialing features of mscrm-addons.com CTI

Dialing from Relations

Enabled for all users  Disable for all users  Client side enabled **4**  
Dialing from relations can be enabled or disabled for all users or left to the client installations to decide on a perUser basis

Change Connection OK Cancel

Figure 17: The Advanced-tab

### 1 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.

### 2 LYNC CHAT OPTIONS

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

### 3 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.

### 4 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.

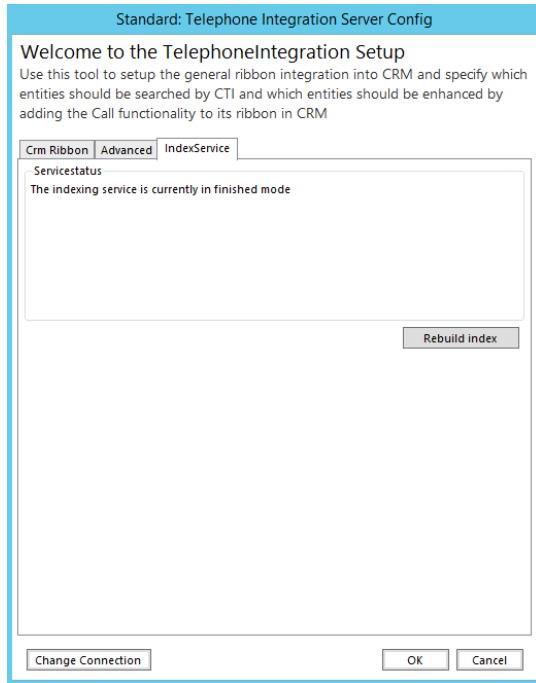


Figure 18: The IndexService-tab

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.

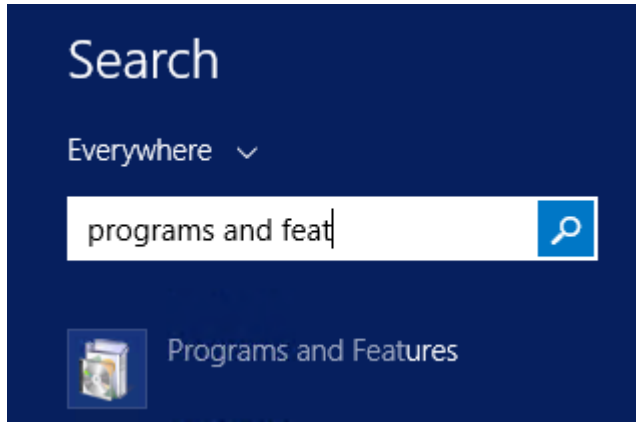


Figure 20: Control Panel – Programs and Features

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.

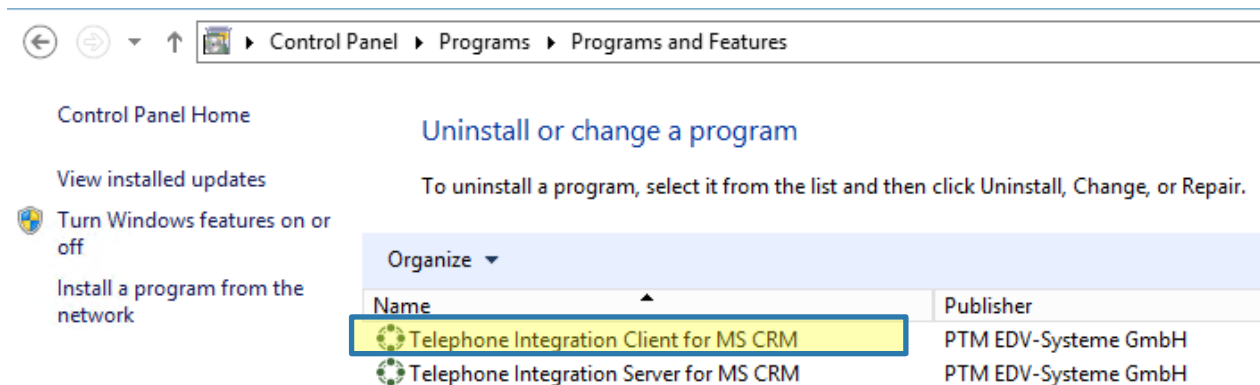


Figure 21: Control Panel – Uninstall TI

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.

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## 6 Contact

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

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