



**mscrm-addons.com**  
**Telephone Integration**  
**for MS CRM 2013**

# TelephoneIntegration for MS CRM 2013

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Version 6.3, October 2013

## **Server Installation Guide**

(How to install/uninstall TelephoneIntegration Server for MS CRM 2013)

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## 1 Common Information

Before installing **TelephoneIntegration Server for MS CRM 2013**, 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 2013
- Configuring TelephoneIntegration

## 2 License

The product comes with a 14-days trial license. Information about licensing can be found on [www.mscrm-addons.com](http://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. Client Runtime is not sufficient.

### 3.2 Supported CRM Versions

Microsoft Dynamics CRM 2011 RC1 Version 5.0.9688.34 and higher

### 3.3 Windows Identity Foundation

Will be installed as part of the Telephone Integration Server Setup

## 3.4 Supported Operating Systems

Windows Vista 32/64bit  
Windows 7 32/64bit  
Windows 8 32/64bit  
Windows Server 2008 32/64bit  
Windows Server 2008 R2 32/64bit  
Windows Server 2012

## 4 Installation

You could install Telephone Integration Server for Microsoft Dynamics CRM 2013 on any supported operating system which is able to connect to your CRM 2013 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

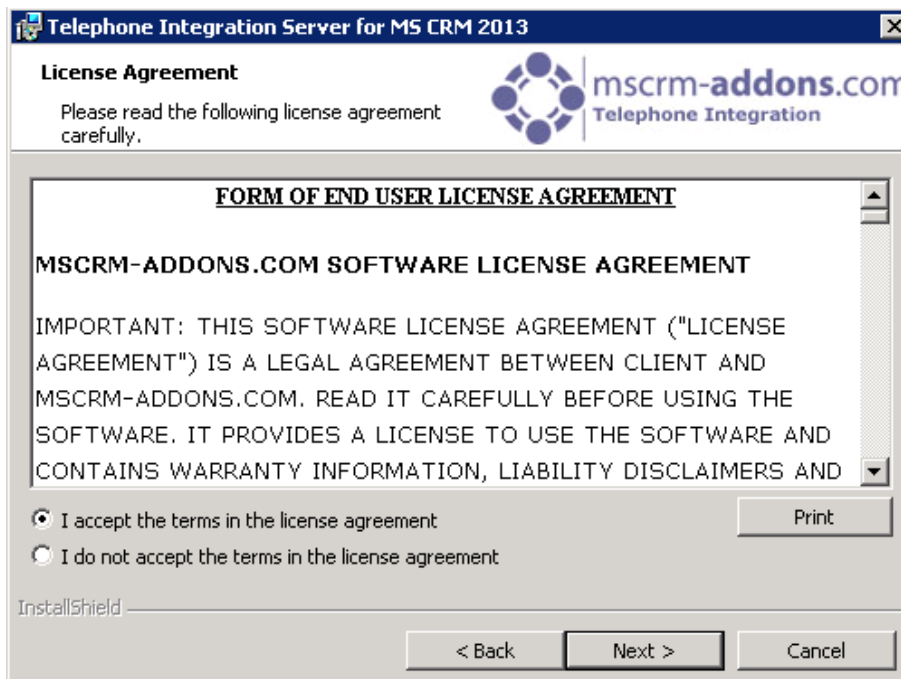
Run the Telephone Integration Server for MS CRM 2013 Setup file. The following window will appear:



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

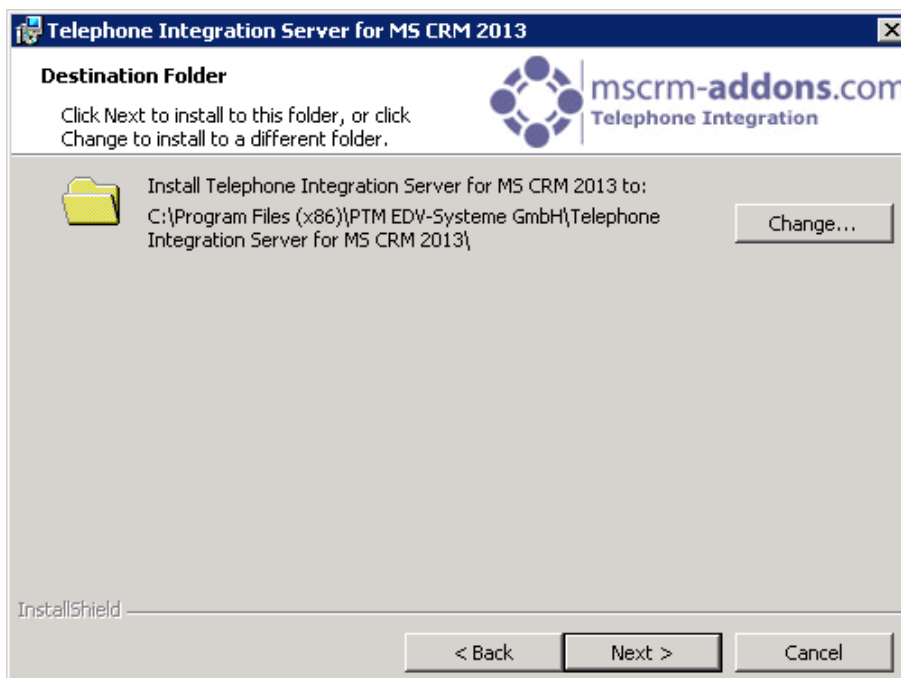
## 4.2 EULA (End User License Agreement)



Click [Next] to proceed.

## 4.3 Folder Selection

Here it's possible to set the installation directory.

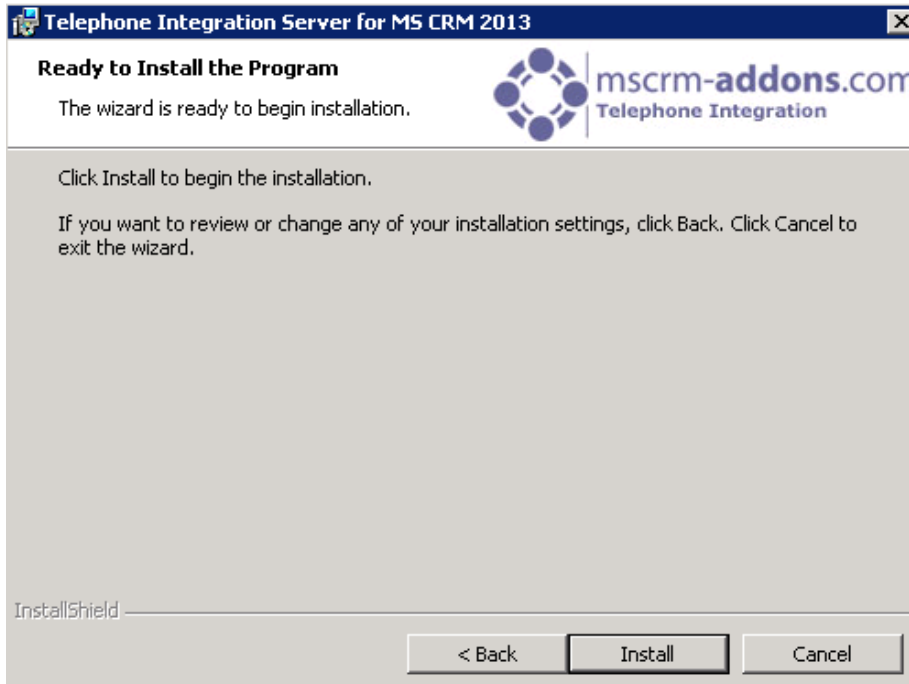


Click [Change] to specify a different installation path.  
Click [Next] to proceed.

## 4.4 Confirm Installation

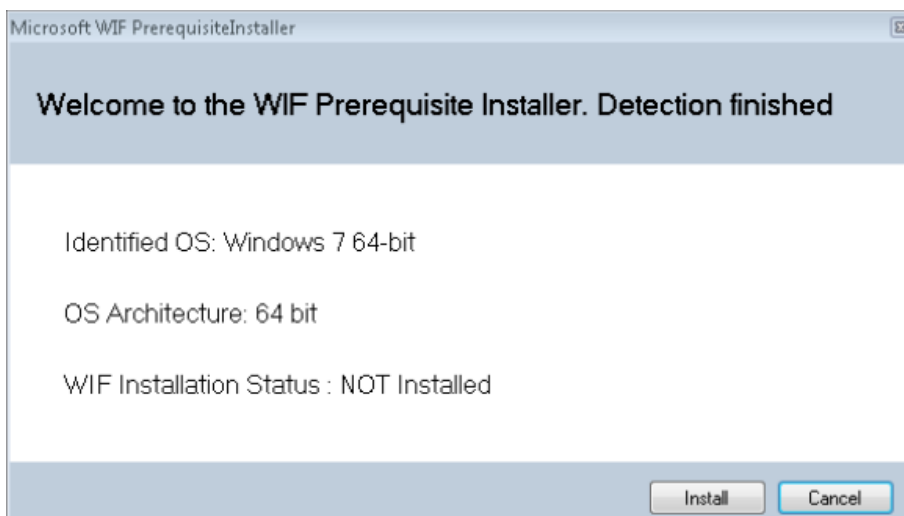
To start the installation, click on [Install].

To change the settings, click on [Back].



## 4.5 Install Windows Identity Foundation

To use Telephone Integration Server for MS CRM 2013 you have to install the Windows Identity Foundation.



#### 4.5.1 How to install Windows Identity Foundation

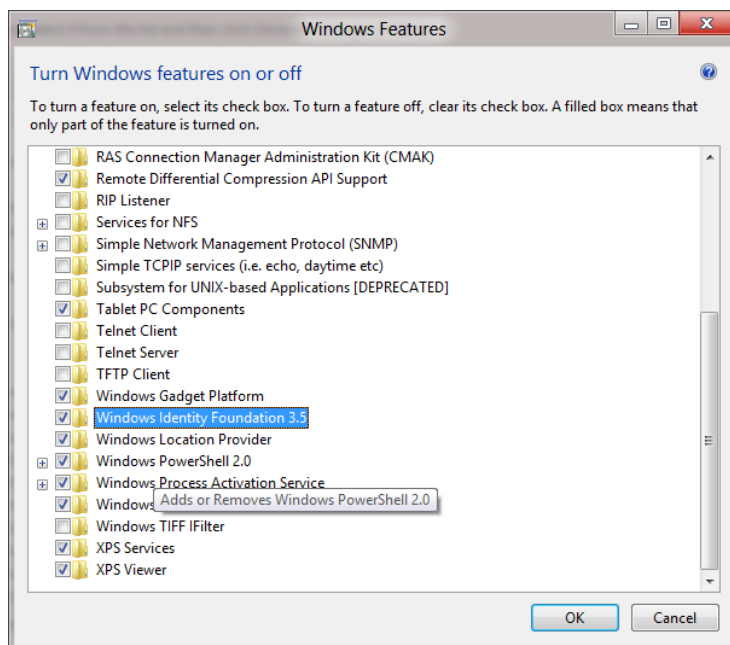
Windows 8 WIF Framework installation (WindowsIdentityFoundation)

Filed Under (CRM 2011 | DocumentsCorePack 2011 | TelephoneIntegration 2011)

Windows 8 has the WIF Framework built in therefore our installers will fail for now trying to update the WIF on windows 8 clients.

To activate WIF on Windows 8 run Control Panel > Programs and Features > Turn Windows Features on or off.

Then check the "Windows Identity Foundation 3.5" check box in the Windows Features dialogue box and click OK:



#### 4.5.2 How to install mscrm-addons for CRM 2013 online

When using CRM 2013 online it is important that the server part of the addon is installed somewhere on your network. This can be installed locally on a PC or anywhere else on one of the supported operating systems (listed below).

Following steps explain how to install the server part of Documents Core Pack and Telephone Integration on your system. Both client and server must be installed!

How to install TI for CRM 2013 Online:

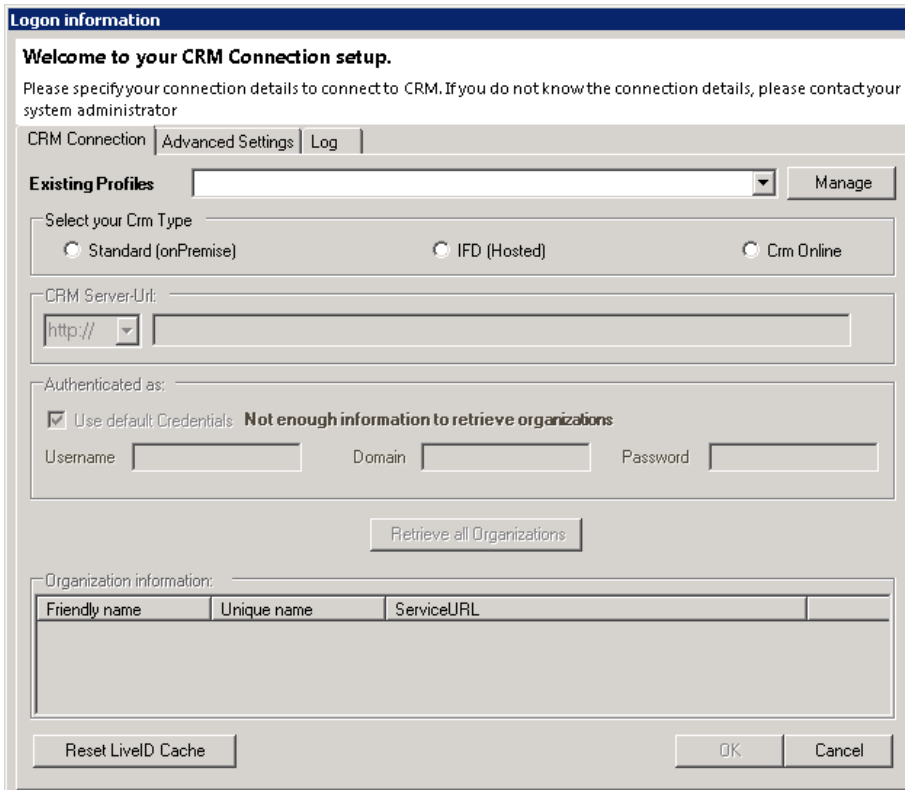
- Download the TI package for CRM 2013 (The install package is for Online and On premise).
- Copy the Server installer to the correct PC and start the setup.
- Please configure TI according to our Server install guide.
- Open the license manager and upload the license key.

Server part installation requirements:

- Microsoft .NET Framework 4.0
  - Supported Operating Systems:
    - Windows 7 32/64bit
    - Windows Vista 32/64bit
    - Windows Server 2008 32/64bit
    - Windows Server 2008 R2 32/64bit
- The server part installation is vital for the configuration of DCP and TI.
- The client part is installed locally.

## 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**

**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** [Dropdown] [Manage]

Select your Crm Type

Standard (onPremise)  IFD (Hosted)  Crm Online

CRM Server-Uri: [http://] [Text Box]

Authenticated as:

Use default: Credentials **Not enough information to retrieve organizations**

Username [Text Box] Domain [Text Box] Password [Text Box]

[Retrieve all Organizations]

Organization information:

| Friendly name | Unique name | ServiceURL |
|---------------|-------------|------------|
|               |             |            |

[Reset LiveID Cache] [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**

**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] crm2013 - Contoso Manage


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

CRM Server-Url:  
 http://  ✓

Authenticated as:  
 Use default Credentials **contoso\administrator**  
 Username    
 Domain    
 Password

Retrieve all Organizations

Organization information:

| Friendly name   | Unique name | ServiceURL |
|---|-------------|------------|
|  Contoso | Contoso     | Contoso    |
|   |             |            |
|   |             |            |

Reset LiveID Cache    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.

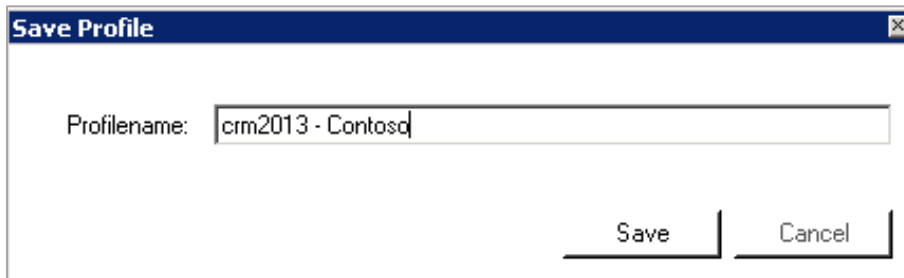
**ProfileOptions**

Create Save the connection in a new profile and save for further use

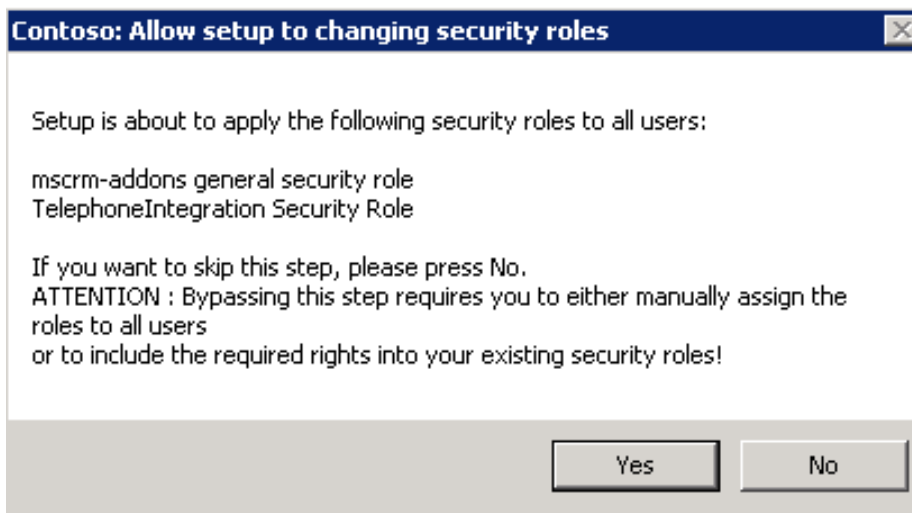
Update Update the selected profile with your changes

Cancel Cancel your changes and return to profile dialog

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



Following window appears:



Click [Yes] to continue.

## 4.7 TelephoneIntegration Setup

This tool can be used 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.

**Contoso: 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**

Ribbon Integration Options

Callbutton  Advanced

Enable number selection from ribbon

Entity Configuration

| Display Name               | Select                              | View   |
|----------------------------|-------------------------------------|--------|
| Account                    | <input checked="" type="checkbox"/> | Fields |
| Address                    | <input type="checkbox"/>            |        |
| Campaign                   | <input type="checkbox"/>            |        |
| Campaign Activity          | <input type="checkbox"/>            |        |
| Campaign Response          | <input type="checkbox"/>            |        |
| Case                       | <input type="checkbox"/>            |        |
| Chat                       | <input type="checkbox"/>            |        |
| Competitor                 | <input type="checkbox"/>            |        |
| Connection                 | <input type="checkbox"/>            |        |
| Contact                    | <input checked="" type="checkbox"/> | Fields |
| Contract                   | <input type="checkbox"/>            |        |
| Contract Line              | <input type="checkbox"/>            |        |
| DCP SPS Site Config 2011   | <input type="checkbox"/>            |        |
| DocumentsCorePack Template | <input type="checkbox"/>            |        |

Change | Configure Service | OK | Cancel

If you choose an entity with a double-click following window appears:

**Fields**

### Select fields for Entity:Address

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) Currency               | <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) Owner                  | <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"/> |
| (LU) Parent                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Address Contact             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Status Code Values:

Within this window you can specify the details on how this entity should be treaded.

If you switch to the [Advanced]-tab within the TelephoneIntegration Setup-window following features can be set:

- Call History options (Organization or User Owned)
- Lync Chat options
- Enable Predictive Dialer
- Dialing from Relations

**Contoso: 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

**Call History options**

**Organization owned**  
All users in the same Organization can view the Call history

**User Owned**  
Only the owner can view the Call history in CRM

**Lync Chat options**

Account : Save SIP

Contact : Save SIP into

Lead : Save SIP into

**Predictive Dialer options**

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

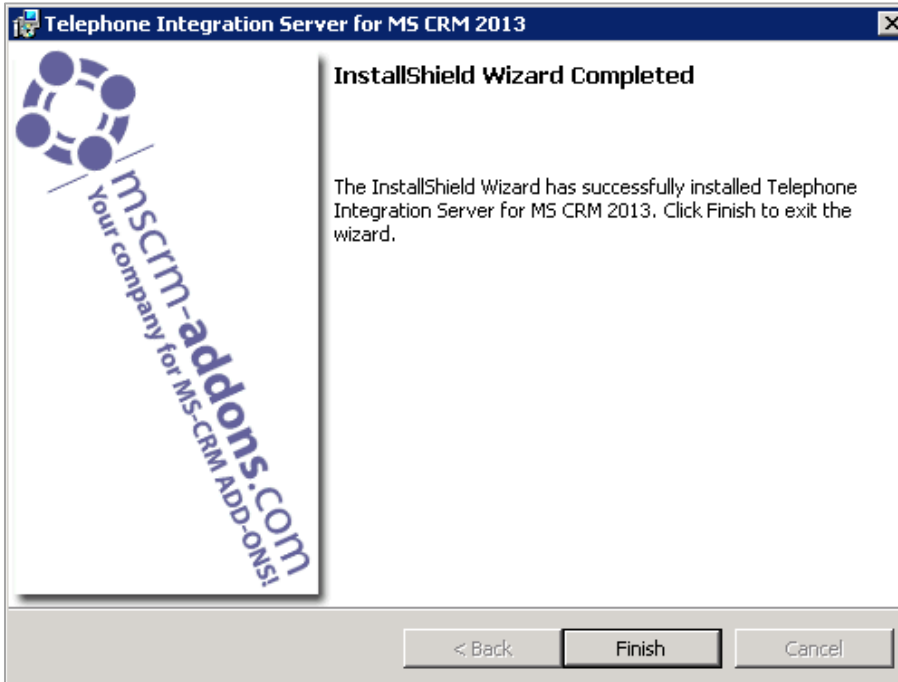
**Dialing from Relations**

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

Change
Configure Service
OK
Cancel

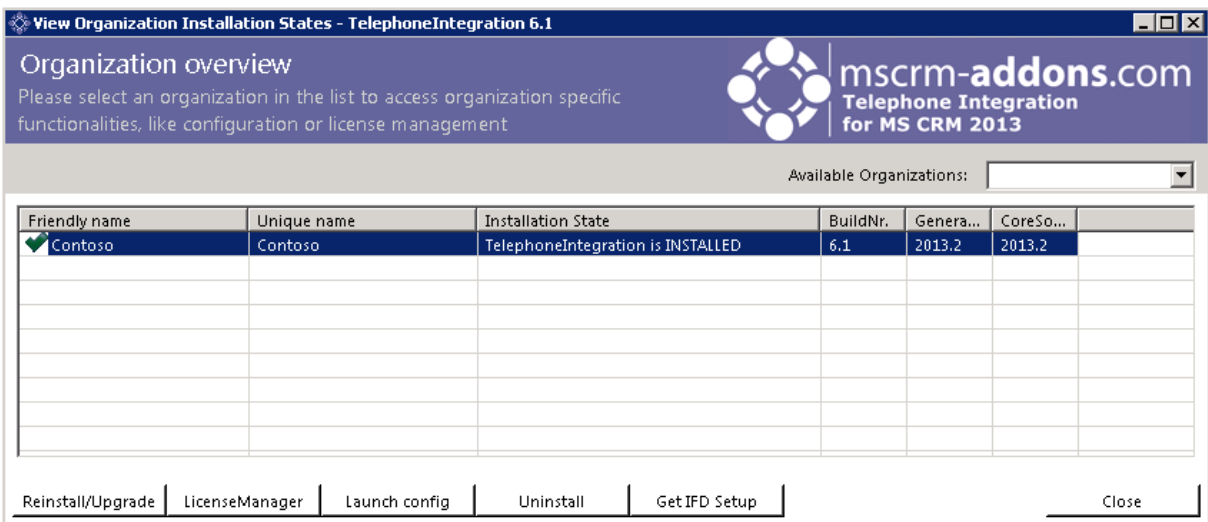
## 4.8 Finish Setup

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. Open Configuration TelephoneIntegration Server for MS CRM 2013 from the start menu ([www.mscrm-addons.com](http://www.mscrm-addons.com)) and choose the connection (Usually you just need to hit OK).



- **Reinstall/Upgrade** – click here to reinstall/upgrade TelephoneIntegration Server
- **LicenseManager** – here you have an overview of your license
- **Launch config** – click here to specify new Entities which should be searched by CTI and which entities should be enhanced by adding the Call functionality to its ribbon to CRM (see screenshot below).

**Contoso: 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**

Ribbon Integration Options

Callbutton  Advanced

Enable number selection from ribbon

Entity Configuration

| Display Name               | Select                              | View   |
|----------------------------|-------------------------------------|--------|
| Account                    | <input checked="" type="checkbox"/> | Fields |
| Address                    | <input checked="" type="checkbox"/> | Fields |
| Campaign                   | <input type="checkbox"/>            |        |
| Campaign Activity          | <input type="checkbox"/>            |        |
| Campaign Response          | <input type="checkbox"/>            |        |
| Case                       | <input type="checkbox"/>            |        |
| Chat                       | <input type="checkbox"/>            |        |
| Competitor                 | <input type="checkbox"/>            |        |
| Connection                 | <input type="checkbox"/>            |        |
| Contact                    | <input checked="" type="checkbox"/> | Fields |
| Contract                   | <input type="checkbox"/>            |        |
| Contract Line              | <input type="checkbox"/>            |        |
| DCP SPS Site Config 2011   | <input type="checkbox"/>            |        |
| DocumentsCorePack Template | <input type="checkbox"/>            |        |

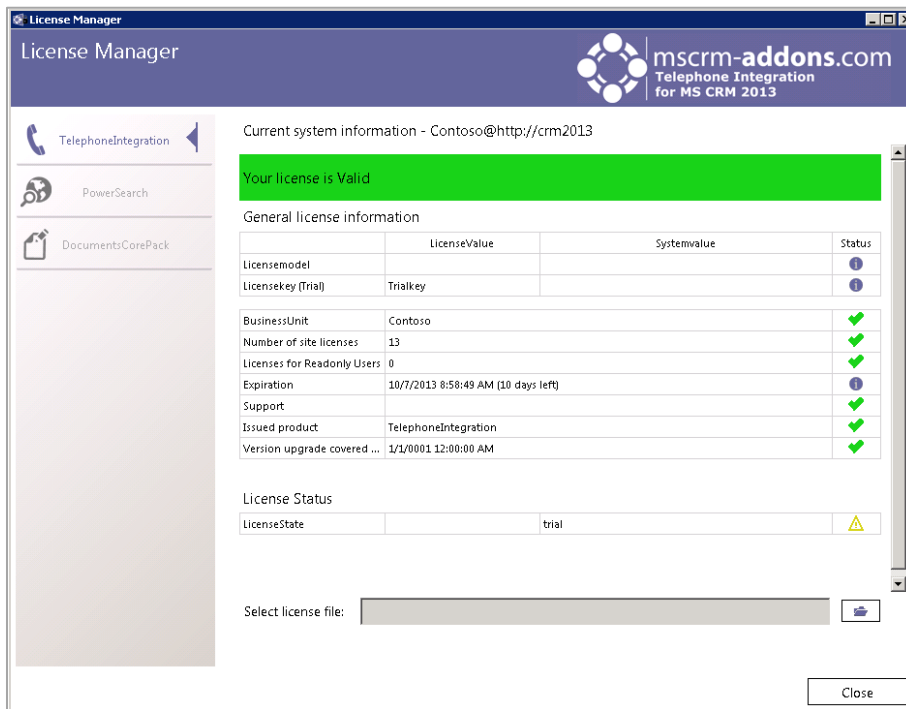
Change | Configure Service | OK | Cancel

- **Uninstall** – click here to uninstall TelephoneIntegration Server for MS CRM 2013. For more information please read [chapter 8](#).
- **Get IFD Setup** – click [here](#) to register and download trial versions from [www.msrm-addons.com](http://www.msrm-addons.com).

## 6 License Management

### 6.1 License Manager

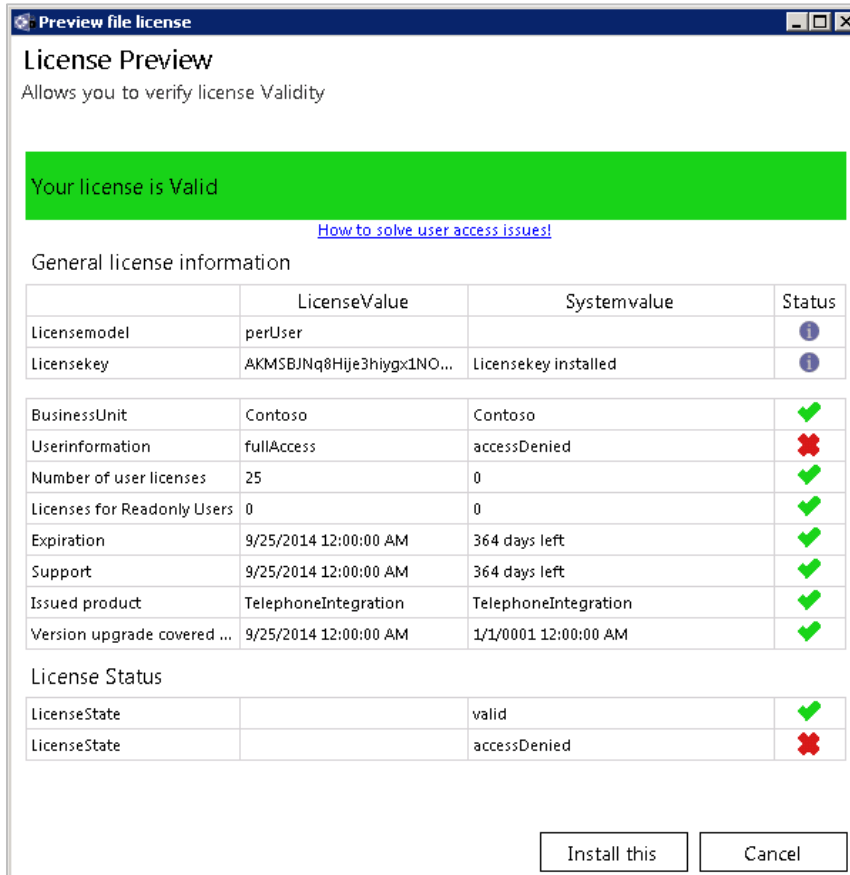
Open TelephoneIntegration License Manager from the start menu ([www.mscrm-addons.com](http://www.mscrm-addons.com)) and choose the connection (usually you just need to hit OK).



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

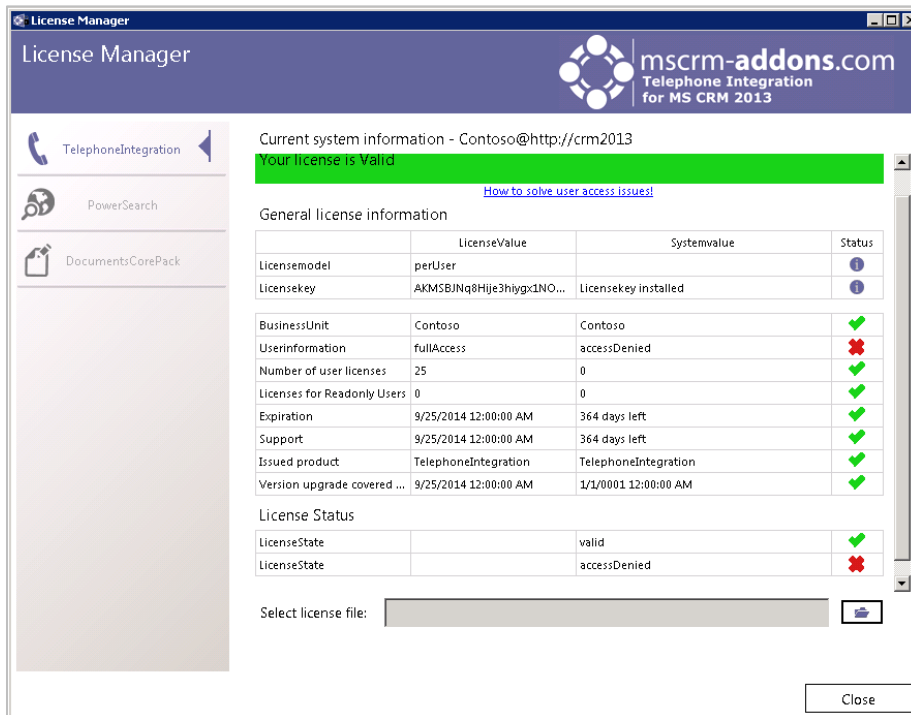
To install a license select the Open Button and you will be prompted to select the license file. Opening the license file will display the following dialog:





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.

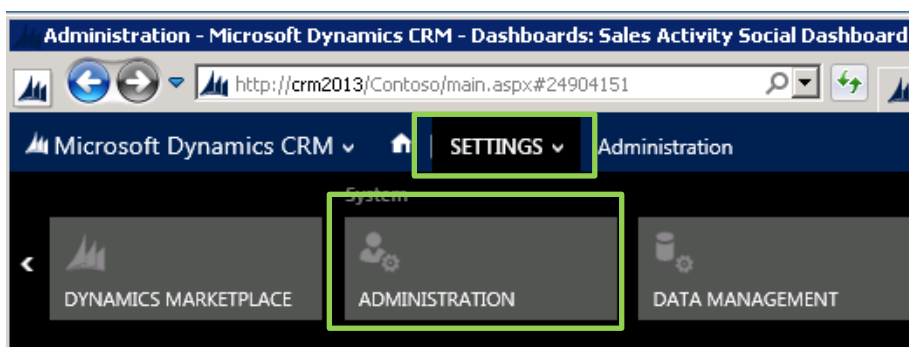
The user who installs TelephoneIntegration does not need to have a license, only users that actually use the client need an active license. After installing the license the LicenseManager will display the license as in the next picture.

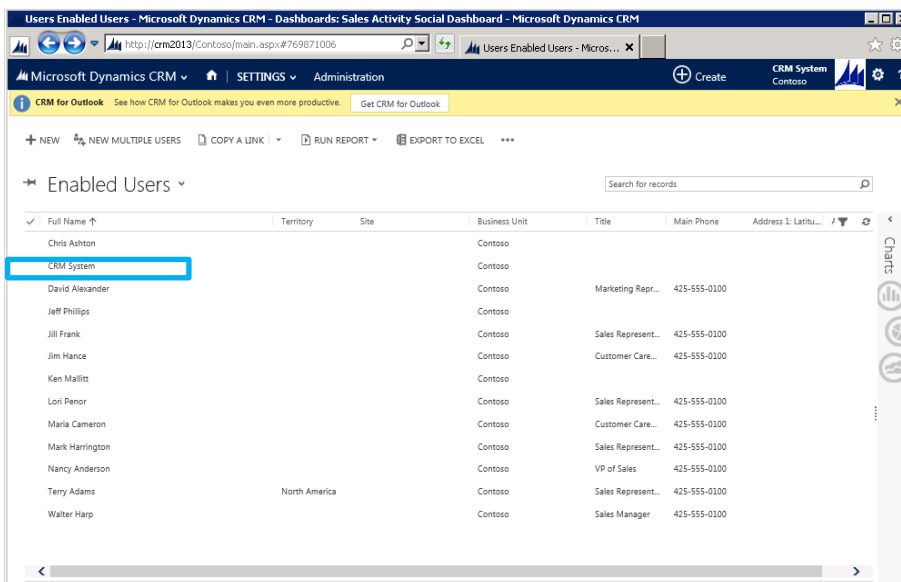
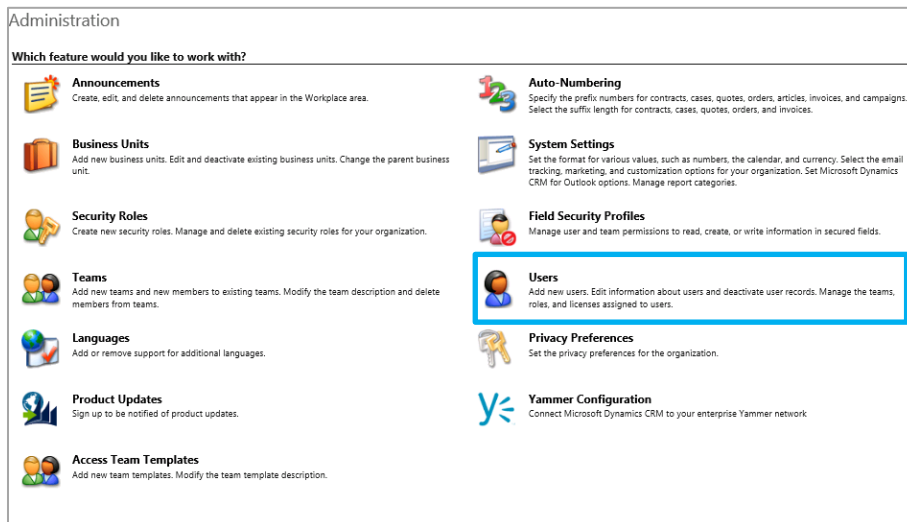


You can see in this Example that the Telephone Integration has a valid license but the user's license access is denied.

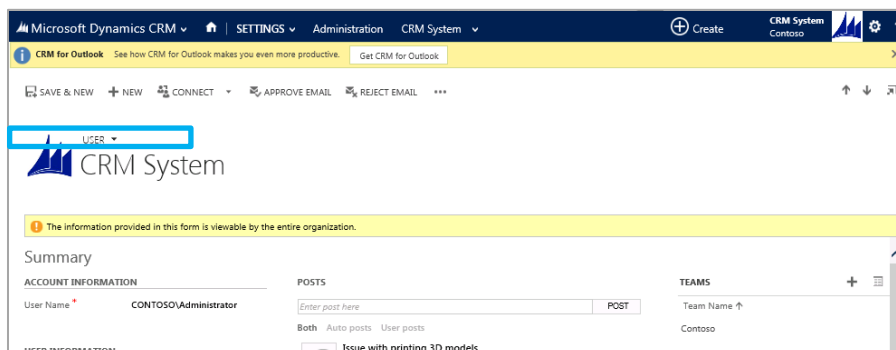
## 6.2 Per User Licensing (Default for Telephone Integration 2013)

Open CRM go to Settings on the Ribbon/Administration/Users and select the required user. See screenshots below:





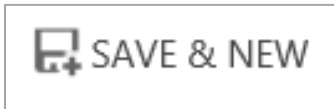
If you choose the required User following window appears:



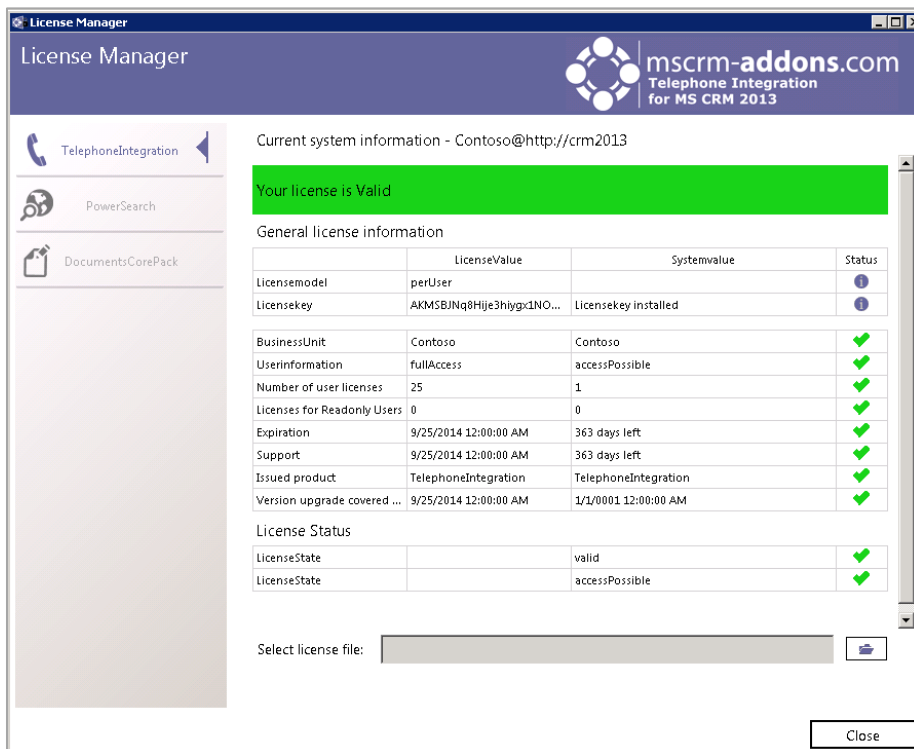
Click on the dropdown button next to user and choose "information" (see screenshot above) and scroll down until you see the "Per User Licensing for TelephoneIntegration for MS CRM 2013". Click next on "Activate User" to set the license for this user on "Yes" (see next screenshot)

| Per User Licensing for Telephone Integration for MS CRM 2013 |     |
|--|-----|
| Activate User  | Yes |

After that click on "Save & New" in the ribbon:



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



License Manager

Current system information - Contoso@http://crm2013


**Your license is Valid**

General license information

|                             | LicenseValue              | Systemvalue          | Status |
|-----------------------------|---------------------------|----------------------|--------|
| LicenseModel                | perUser                   |                      | !      |
| Licensekey                  | AKMSBJNq8Hije3hiyg:1NO... | Licensekey installed | !      |
| BusinessUnit                | Contoso                   | Contoso              | ✓      |
| UserInformation             | fullAccess                | accessPossible       | ✓      |
| Number of user licenses     | 25                        | 1                    | ✓      |
| Licenses for Readonly Users | 0                         | 0                    | ✓      |
| Expiration                  | 9/25/2014 12:00:00 AM     | 363 days left        | ✓      |
| Support                     | 9/25/2014 12:00:00 AM     | 363 days left        | ✓      |
| Issued product              | TelephoneIntegration      | TelephoneIntegration | ✓      |
| Version upgrade covered ... | 9/25/2014 12:00:00 AM     | 1/1/0001 12:00:00 AM | ✓      |

License Status

|              |                |   |
|--------------|----------------|---|
| LicenseState | valid          | ✓ |
| LicenseState | accessPossible | ✓ |

Select license file:  

Close

## 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:

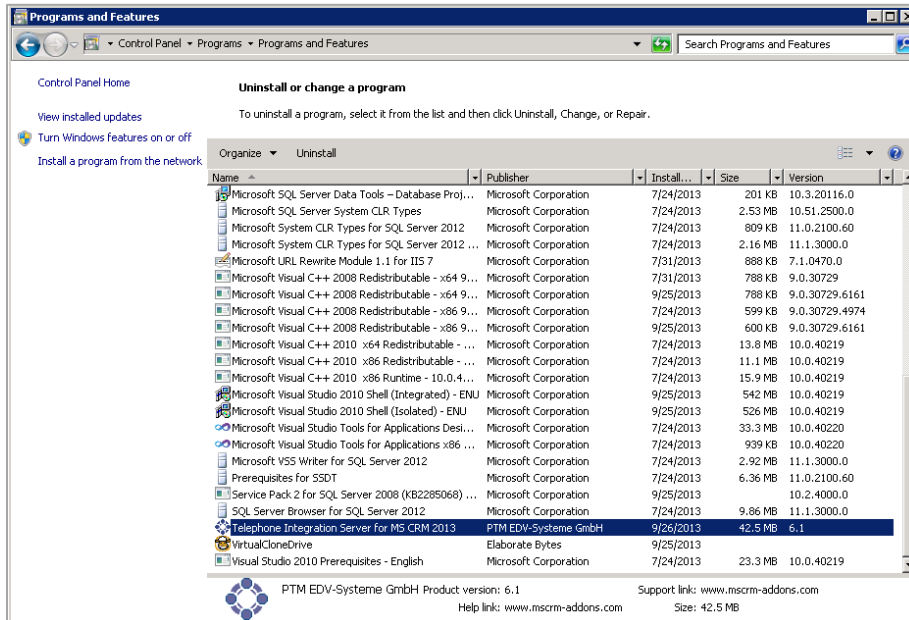
- TelephoneIntegration Security Role

## 8 Uninstall

To uninstall TelephoneIntegration Server for MS CRM 2013 select Programs in Control Panel.



Search for TelephoneIntegration Server CRM 2013 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](mailto:support@mscrm-addons.com) or visit our blog <http://blogs.mscrm-addons.com>

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[www.mscrm-addons.com](http://www.mscrm-addons.com)