

# Telephone Integration for Microsoft CRM 3.0 (TI for MS CRM 3) Server

Version 2.1

**Implementation Guide** 

(How to install/uninstall,..)

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## 1 Installing of TI for MS CRM 3

Before installing **TI for MS CRM 3**, 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:

- Installing the TI for MS CRM 3.
- 2. Configuring the ISV.CONFIG.XML



### 1.1 Installing

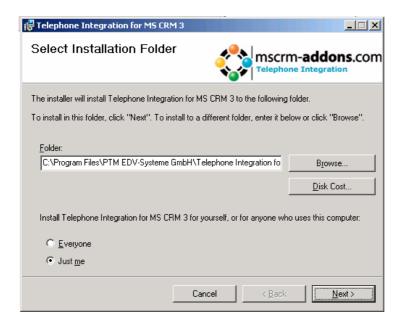
You have to install TI for MS CRM 3 on your server where MS CRM is running.

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



Click Next>

3. Select a path

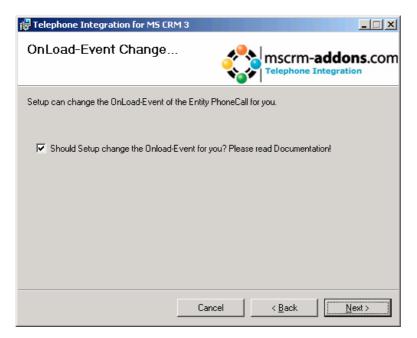




#### 4. Select Language



#### 5. Changing OnLoad Event of Entity Phonecall



Setup can change the Onload Event for you. But maybe it is more save to do this by hand!

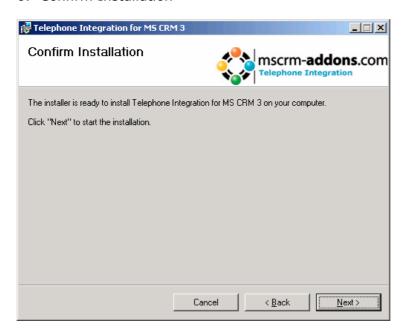


So change the OnLoad Event for the Entity PhoneCall by adding the following Lines:

```
/*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*/
```

For more about this please see capture 3!

#### 6. Confirm Installation



After Click on the Next Button the Installation begins.

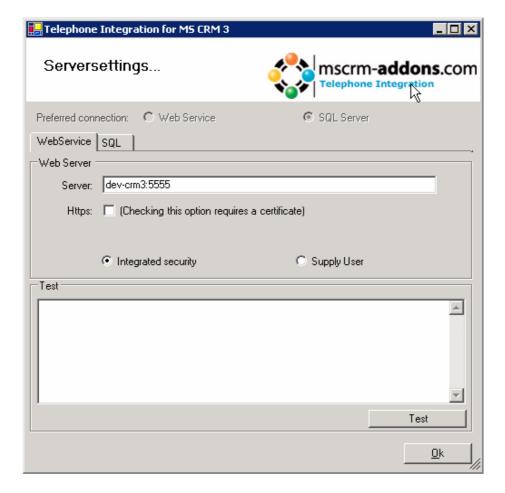


#### 7. Serversettings

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-crm3 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.

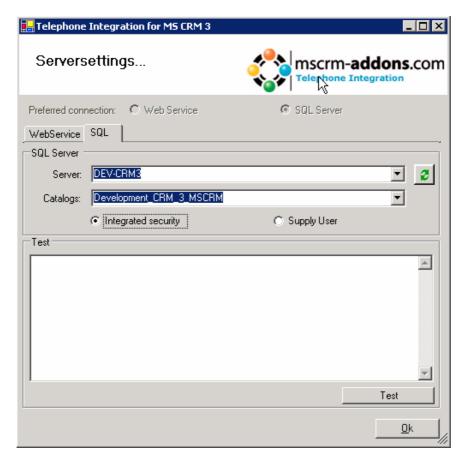


**Integrated security:** Check this radiobutton to logon with your local credentials.

**Supply User:** Check if you want to supply a specific user. In this case you'll have to enter username, password and domain of the user.



#### 7.2 SQL Server



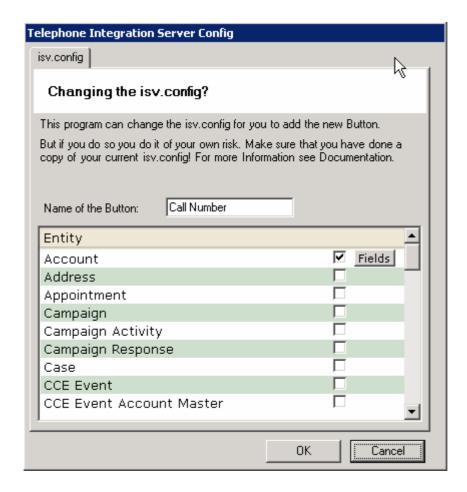
**Server:** choose the SQL server where the MSCRM – Database is running. **Catalogs:** choose the MSCRM-catalogue. E.g.: Development\_CRM\_3\_MSCRM.

Again you've got the possibility to logon with your local credentials (Integrated security) or to supply a specific user. (see 7.1)



#### 8. 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

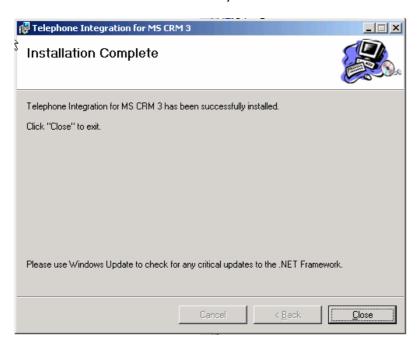
\* Phone Call

Please Press OK to accept these settings.

For more Information please see chapter 2.



9. After the installation ended you have to click on the "close" 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:

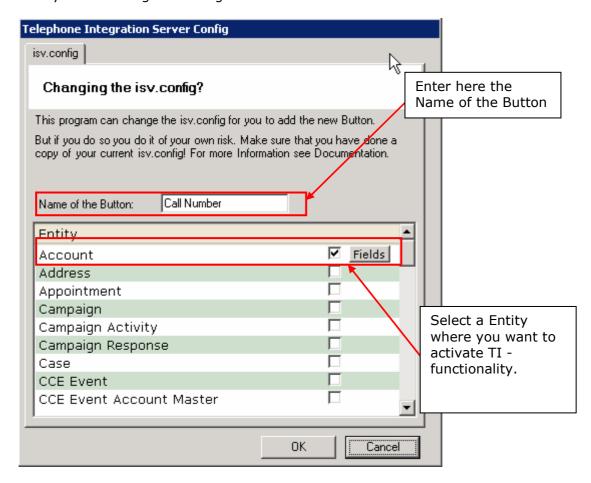
|Start| All Programs - www.MSCRM-ADDONS.com - Telephone Integration for MS CRM 3 - Telephone Integration Setup

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.

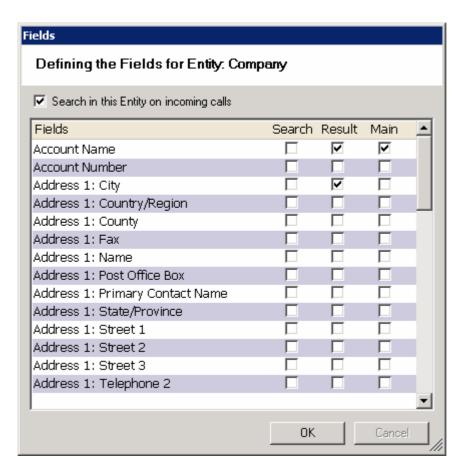


Now you can change the things...



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!

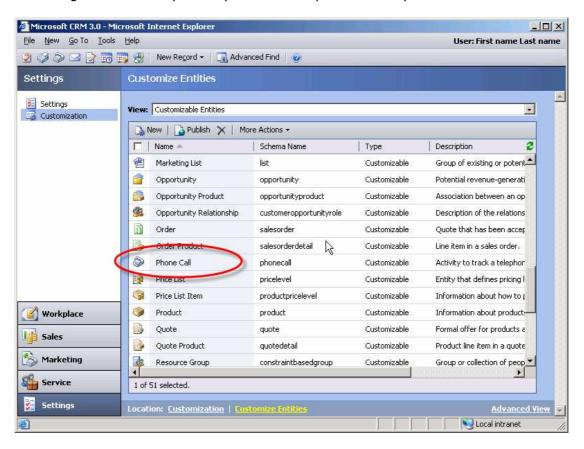
If there is an incoming Call, the TI Client searches for this Number in each Entity you selected, so more Entities you select, as longer TI needs to search for it.

The Outboundcall-Window also uses the Search-Fields.



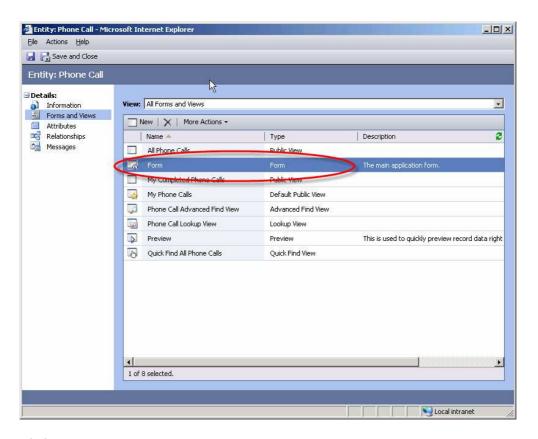
# 3 Changing OnLoad Event

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

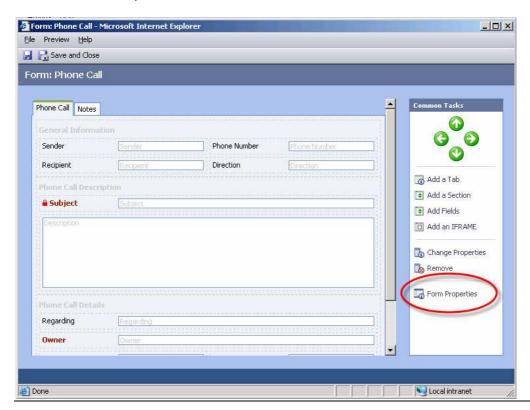


Switch to Forms and Views and open the Main Form.





#### Click on Form Properties





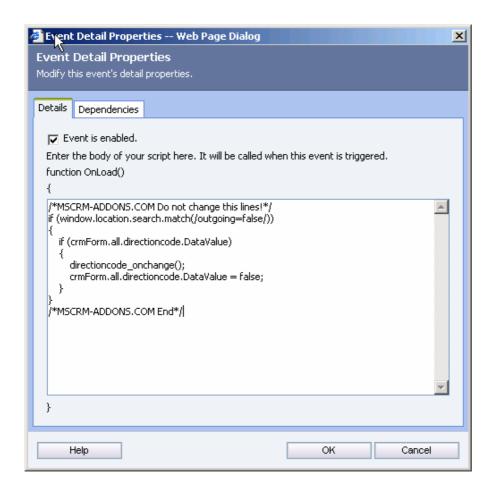
Now select the OnLoad Event and Press on [Edit]



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) Elle New Go To Ioos Hep

New Record • Advanced Find Settings

Gustomization New | 🍒 Publish 🗙 | More Actions 🕶 
 Name
 Schema Name
 Type
 Description

 Upportunity
 Opportunity
 Customizable
 Potential revenue-generating event, or sale to an account, winch ne.
 Opportunity Product opportunity outsomzable Customzable
Opportunity Relationship outsomeropportunityrold Customzable
Opportunity Relationship outsomeropportunityrole Customzable
Price List pricelevel Customzable
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Product product Customzable
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Opportunityr Association between an opportunity and a product.

Description of the relationship between an account or contact and a...

Activity to track a telephone call.

Entity that defines pricing levels.

Information about how to price a product in the specified price levely...

Information about products and their pricing information.

Prospect or potential axies opportunity. Leads are converted into ac...

Fromal offer for products and/or services, proposed at specific price...

Product line item in a quote. The details include such information as ...

Group or collection of people, equipment, and/or facilities that can b...

Group or collection of people, busers are assigned roles that authori...

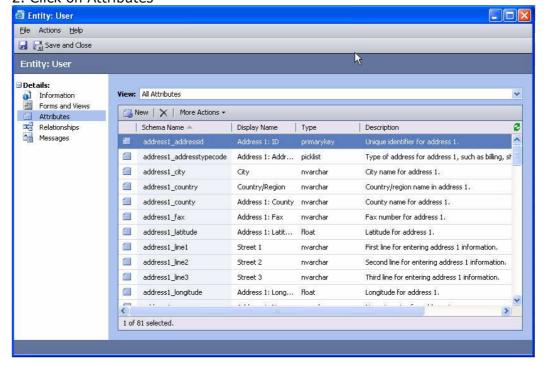
Storage of sales iterature, which may contain one or more documents.

Activity offered by the organization to satisfy its customer's needs....

Information regarding subjects available in the system. Customizable Association between an opportunity and a product. quotedetail Customizable constraintbasedgroup Customizable role Role Role role Customizable
salesliterature Customizable
serviceappointment Customizable Service Activity
Subject Information regarding subjects available in the system.

Generic activity representing work needed to be done. subject Customizable 23 Team team Customizable
territory Customizable
new\_test Custom
upon Customizable Customizable Group of otherwise unrelated system users. Teams can be used to c... Territory represents sales regions. Unit **Workplace** Customizable **Sales** systemuser Customizable Person with access to the Microsoft CRM system and who owns obje... 8 Marketing Wisa Payment new\_ledgerpayment 1 of 59 selected

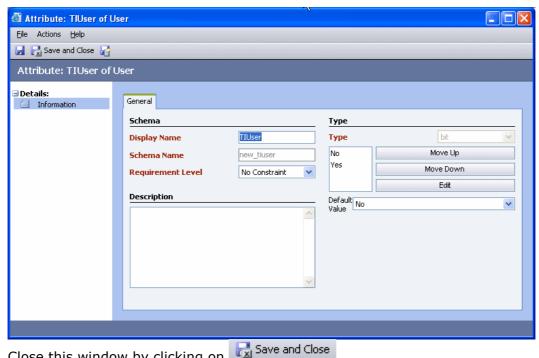
2. Click on Attributes



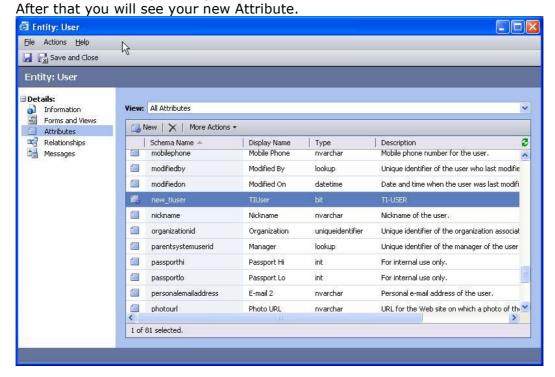


3. Now add a new Attribute by clicking on

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



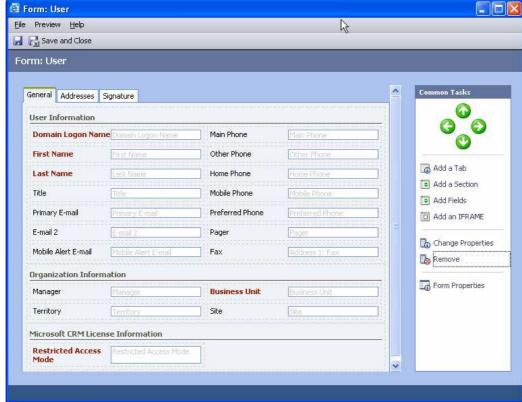
Close this window by clicking on





Change to Forms and Views... 🖨 Entity: User Eile Actions <u>H</u>elp 1/2 💹 🌄 Save and Close Entity: User ☐ Details: information
Forms and Views View: All Forms and Views New | X | More Actions ▼ Attributes Relationships
Messages Name A Description 2 All Salespersons Associated View List of all salespeople in the organization 15 Disabled Users Public View - 4 Enabled Users Default Public View Form Local Business Users Public View -51 My Direct Reports Public View Preview Preview This is used to quickly preview record data right in Quick Find All Users Quick Find View Restricted Access Users Salesperson Associated View - By Te... Associated View Service Calendar Form The Service Calendar form. Subsidiary Users Public View User Advanced Find View Advanced Find View ☐ I Iser Associated View Associated View 1 of 15 selected.

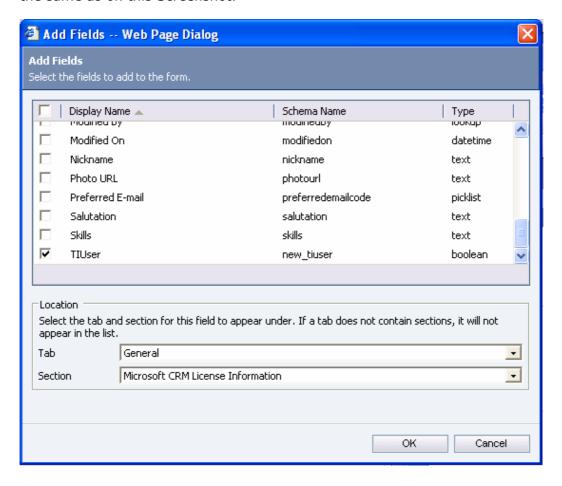
...and open the 'Main' Form.





On the right side click on 📑 Add Fields

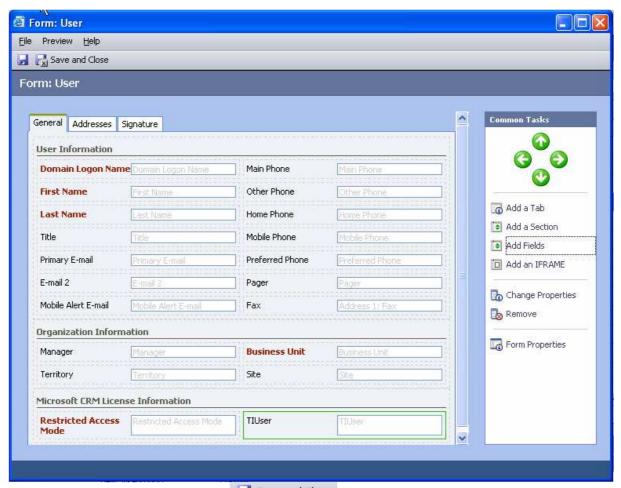
Scroll down to **TIUser**, check it and be sure that the Section 'Location' looks like the same as on this Screenshot.



Press on [OK].

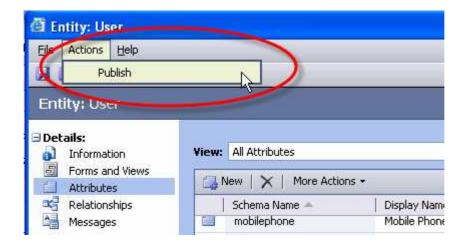


Now Your Main User Form should look like this:



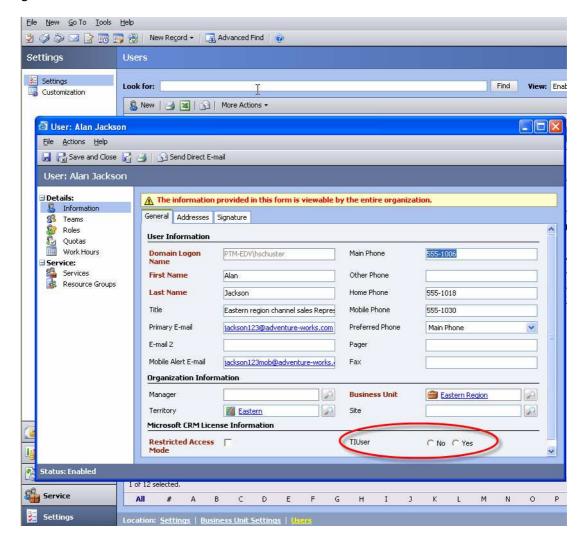
Close this window by clicking on Save and Close

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 <a href="mailto:support@mscrm-addons.com">support@mscrm-addons.com</a> or call +43 316 680 880 0