

TI addon integration with Unified Service Desk

For integration we need a USD package deployed in CRM and a USD client application. After deploying USD solutions into CRM, we need to do the following steps:

1. Create a new Hosted Control of type „CTI Desktop Manager“.
2. Create a new Navigation Rule
3. Create a new CTI Search under the newly created Navigation Rule.
4. Create a new ActionCall : PTMCTIOpenResolvedRecord
 - 4.1 Create a sub action call : PTMAActionCall:ShowNewPhoneCall
 - 4.2 Create a sub action call: PTMAActionCall:OpenCreatedPhoneCall
5. Create a new ActionCall: PTMOpenNewRecord.
6. Go back in the newly created NavigationRule
 - 6.1 under the section “No Matches” choose Decision “Create Session then do Action” and Action “PTMOpenNewRecord”
 - 6.2 under the section “Single Matches” choose Decision “Create Session, Load Match then Do Action” and Action “PTICTIOpenResolvedRecord.”

- Step 1 : Create a new Hosted Control of type „CTI Desktop Manager“ with name “PTMCTIDesktopManager” and USD Component Type “CTI Desktop Manager” .

Set values:

Assembly URI : Microsoft.Crm.UnifiedServiceDesk.GenericListener

Assembly Type : Microsoft.Crm.UnifiedServiceDesk.GenericListener.DesktopManager

HOSTED CONTROL INFORMATION

PTMCTIDesktopManager

General

| | |
|------------|----------------------|
| Name * | PTMCTIDesktopManager |
| Sort Order | 35 |

Unified Service Desk

| | |
|--------------------|---------------------|
| USD Component T. * | CTI Desktop Manager |
|--------------------|---------------------|

Common Properties

| | |
|---------------|-------------|
| Display Group | HiddenPanel |
|---------------|-------------|

Hosting

Assembly Info

| | |
|-----------------|---|
| Assembly URI * | Microsoft.Crm.UnifiedServiceDesk.GenericListener |
| Assembly Type * | Microsoft.Crm.UnifiedServiceDesk.GenericListener.DesktopManager |

- Step 2 : Create a new Navigation Rule with name "PTMCTISearch" as follows:

The screenshot shows the configuration for a navigation rule named "PTMCTISearch". The window title is "PTMCTISearch". It has three main sections: "General", "Route Logic", and "CTI".

| General | |
|---------|--------------|
| Name * | PTMCTISearch |
| Order * | 67 |

| Route Logic | |
|-------------|----------------------|
| From * | PTMCTIDesktopManager |

| CTI | |
|---------------------|------|
| Initiating Activity | -- |
| Direction | Both |

- Step 3 : Create a new CTI Search under the newly created Navigation Rule as following:

The screenshot shows the configuration for a new CTI Search named "PTMCTIGeneralSearch". The window title is "New CTI Search". It has a "General" section with the following fields:

| General | | | |
|------------|---|-----------|---------------|
| Name * | PTMCTIGeneralSearch | Owner * | Peter Korosec |
| Order * | 1 | Direction | -- |
| FetchXML * | <pre><fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false" > <entity name="[[cti.EntityName]]" > <attribute name="[[cti.EntityId]]" /> <filter type="and" > <condition attribute="statecode" operator="eq" value="0" /> <filter type="or" > <condition attribute="[[cti.EntityId]]" operator="eq" value="[[cti.Guid]]" /> </filter> </filter> </entity> </fetch></pre> | | |

The FetchXML content :

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false" >
  <entity name="[[cti.EntityName]]" >
    <attribute name="[[cti.EntityId]]" />
    <filter type="and" >
      <condition attribute="statecode" operator="eq" value="0" />
      <filter type="or" >
        <condition attribute="[[cti.EntityId]]" operator="eq" value="[[cti.Guid]]" />
      </filter>
    </filter>
  </entity>
</fetch>
```

</fetch>

- Step 4 : Create a new ActionCall : PTMCTIOpenResolvedRecord



PTMCTIOpenResolvedRecord

General

Name* **PTMCTIOpenResolvedRecord** Owner* **Peter Korosec**

Order

Action

Hosted Control* **CRM Global Manager** Action* **Open_CRM_Page**

Data **Id=[[Context.Id]]**
LogicalName=[[Context.LogicalName]]

- Create a sub action call : PTMAActionCall:ShowNewPhoneCall



PTMAActionCall:ShowNewPhoneCall

General

Name* **PTMAActionCall:ShowNewPhoneCall** Owner* **Peter Korosec**

Order **1**

Action

Hosted Control* **CRM Global Manager** Action* **New_CRM_Page**

Data **LogicalName=phonecall**
phonenumber=[[cti.PhoneNumber]]
directioncode=[[cti.Smer]]

with Advanced Condition:



Advanced

Condition **[[cti.OpenNewPhoneCall]] == "1"**

- Create a sub action call: PTMAActionCall:OpenCreatedPhoneCall

PTMActionCall:OpenCreatedPhoneCall

General

Name ^{*} PTMActionCall:OpenCreatedPhoneCall Owner ^{*} Peter Korosec

Order 2

Action

Hosted Control ^{*} CRM Global Manager Action ^{*} Open_CRM_Page

Data Id=[[cti.OpenExistingPhoneCall]] LogicalName=phonecall

with Advanced Condition: [[OpenExistingPhoneCall]]!="-1"

The ActionCall : PTMCTIOpenResolvedRecord should now have 2 subactive calls:

ACTION CALL : INFORMATION

PTMCTIOpenResolvedRecord

Action Associated View

| Name [↑] | Order [↑] |
|------------------------------------|--------------------|
| PTMActionCall:ShowNewPhoneCall | 1 |
| PTMActionCall:OpenCreatedPhoneCall | 2 |

- Step 5 : Create a new ActionCall: PTMOpenNewRecord.

ACTION CALL : INFORMATION

PTMOpenNewRecord

General

| | | | |
|------------------|---|----------|---------------|
| Name * | PTMOpenNewRecord | Owner * | Peter Korosec |
| Order | <input type="text" value="1"/> | | |
| Action | | | |
| Hosted Control * | CRM Global Manager | Action * | New_CRM_Page |
| Data | LogicalName=[[cti.NewEntity]+] [[cti.NewEntityPhoneField]]=[[cti.PhoneNumber]] | | |

with Advanced Condition:

Advanced

Condition `[[cti.NewEntity]]!="-1"`

- Step 6 : Go back in the newly created NavigationRule
 - under the section "No Matches" choose Decision "Create Session then do Action" and Action "PTMOpenNewRecord"
 - under the section "Single Maches" choose Decision "Create Session, Load Match then Do Action" and Action "PTICTIOpenResolvedRecord."

| | |
|---------------------|---|
| No Matches | |
| Decision | Create Session then Do Action |
| Action | PTMOpenNewRecord |
| Single Match | |
| Decision | Create Session, Load Match then Do Action |
| Action | PTMCTIOpenResolvedRecord |

Restart USD client.