



CRM CTI Installation Guide

Microsoft Dynamics CRM 4.0

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Introduction

Document Overview.

This document details the steps required to install and configure CRMAddins CTI for Microsoft Dynamics CRM 4.

Version Compatibility.

CRMAddins CTI is designed to be run within a Microsoft Dynamics CRM 4 environment and this document assumes that a CRM 4 environment is being used. For details on other version compatibility please email info@crmaddins.co.uk.

Full support of all versions of MSCRM 4 (Workgroup/Professional and Enterprise), both 32 and 64 bit deployments.

CRMAddins CTI for Microsoft Dynamics CRM 4.0.

CRMAddins CTI is an integrated Addin module that allows you to make and record both inbound and outbound calls from CRM automatically creating a telephone activity and associating it with known callers as well as allowing incoming calls from unknown caller to be created for saving against a record once it have been created.

- You can make calls directly from a CRM record that has telephone fields
- You can track the calls that are made or received
- Easy to use
- Configurable for exact number matching
- Configurable for when a CRM activity is created, of call being made, call being answer, call being completed.



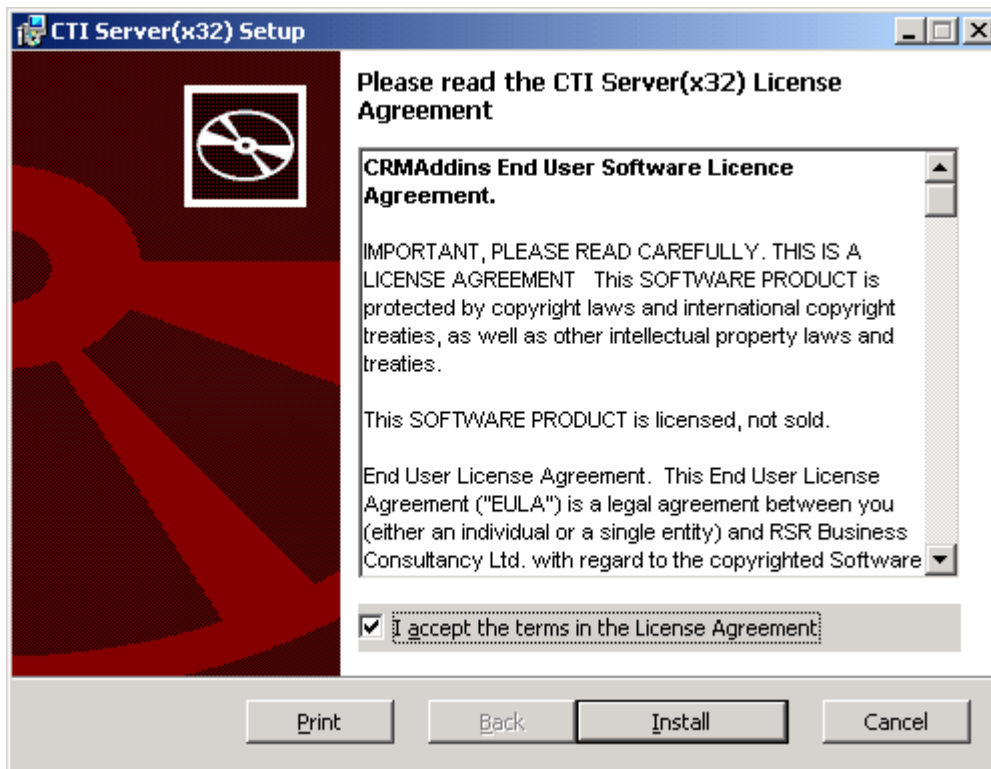
Installing CRMAddins CTI

Pre-requisites.

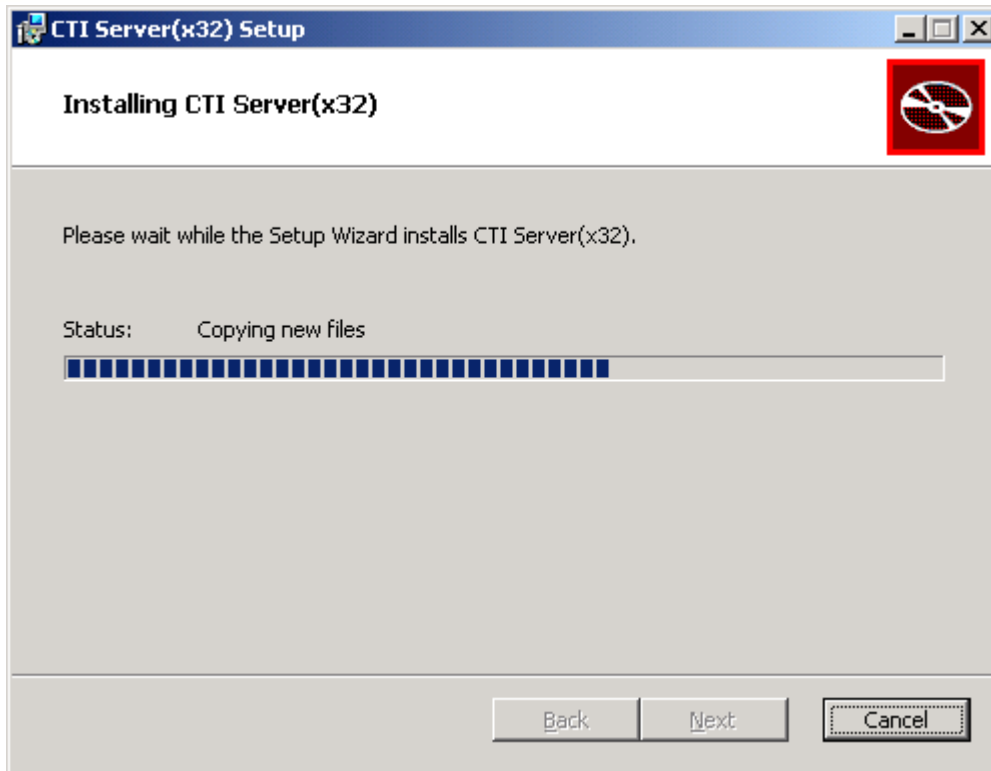
- Installation is carried out on the CRM Server
- Installation is carried on the CRM client
- Customisations are applied to the filed that require telephone activation
- Installation is carried out by running the CRMAddins installation file
- TAPI service is installed and operational on the workstation
- Internet Explorer 8 is recommended, this can be downloaded at no cost from Microsoft
- .Net Framework 3.5 is required, this can be downloaded at no cost from Microsoft

Server installation steps.

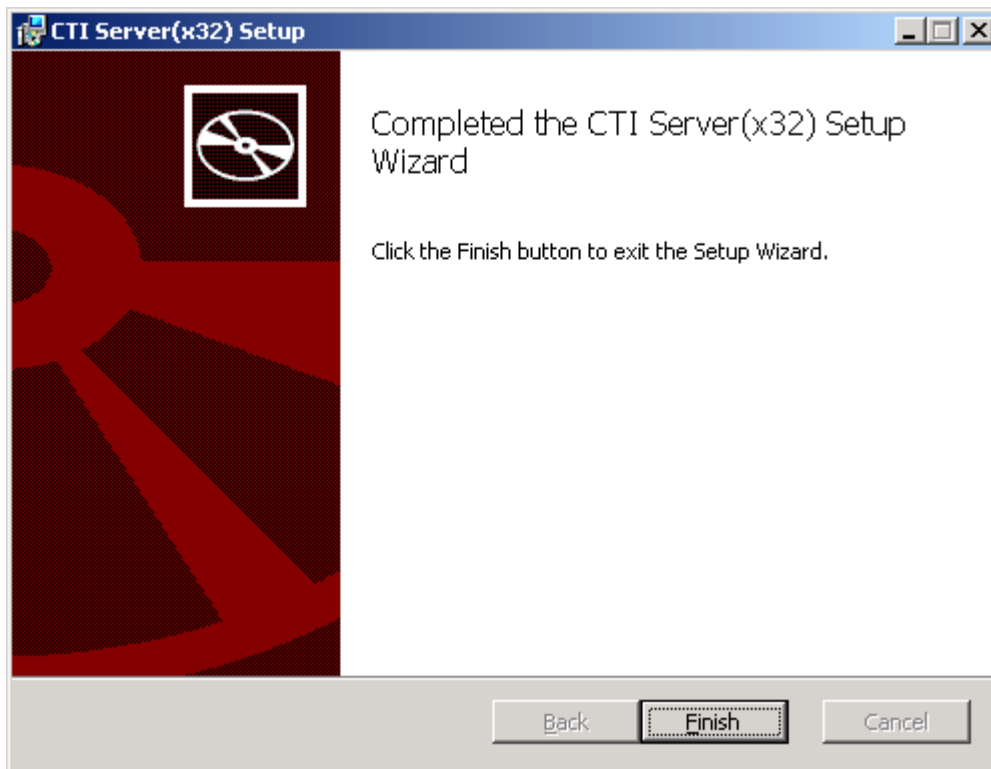
1. Select the server installation file from the saved location and start the installation process and select the relevant installation file X32 of X64 depending upon the sever operating system and hardware platform.
2. When presented with the licence agreement select yes and complete as shown below and select install.



3. Installation progress will be shown as displayed below.



4. When the installation has completed select finish.

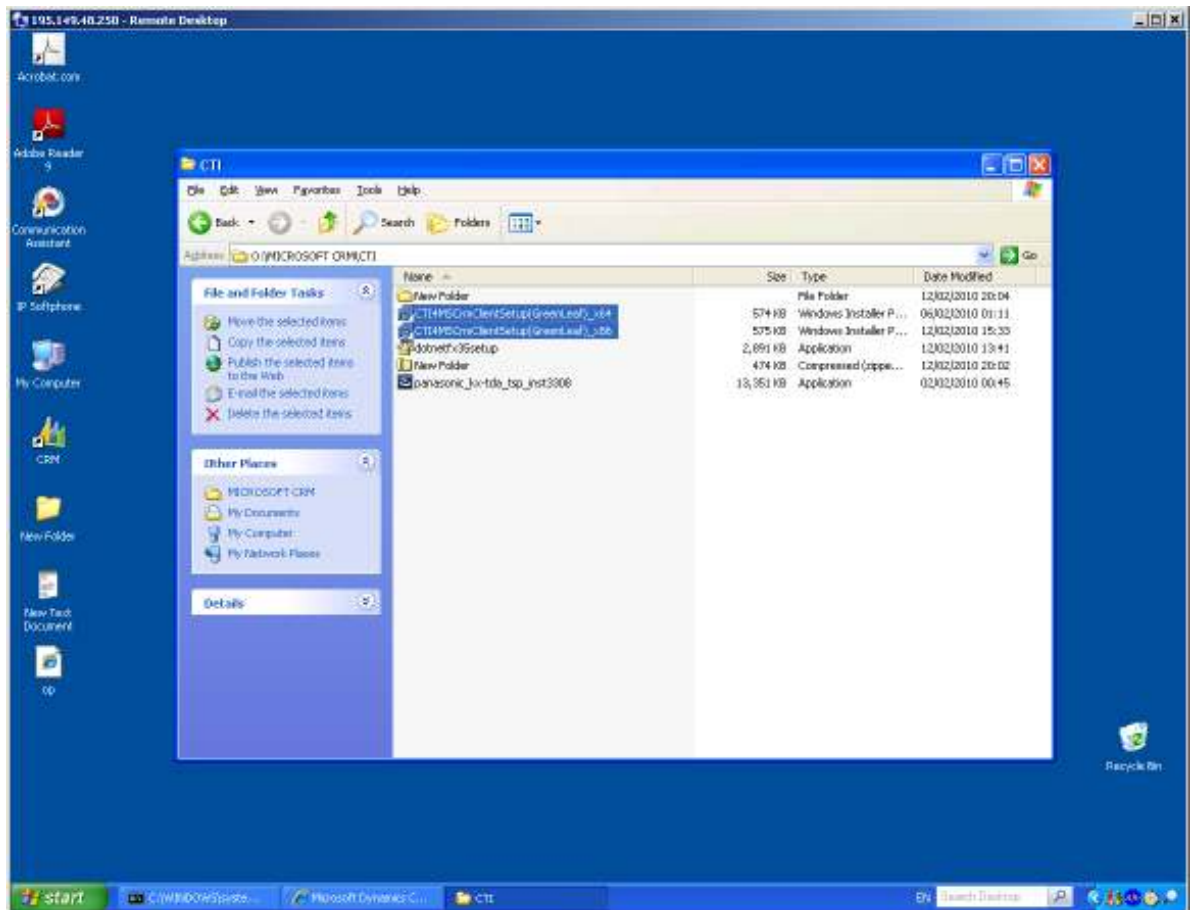


5. This completes the installation process for the server module.

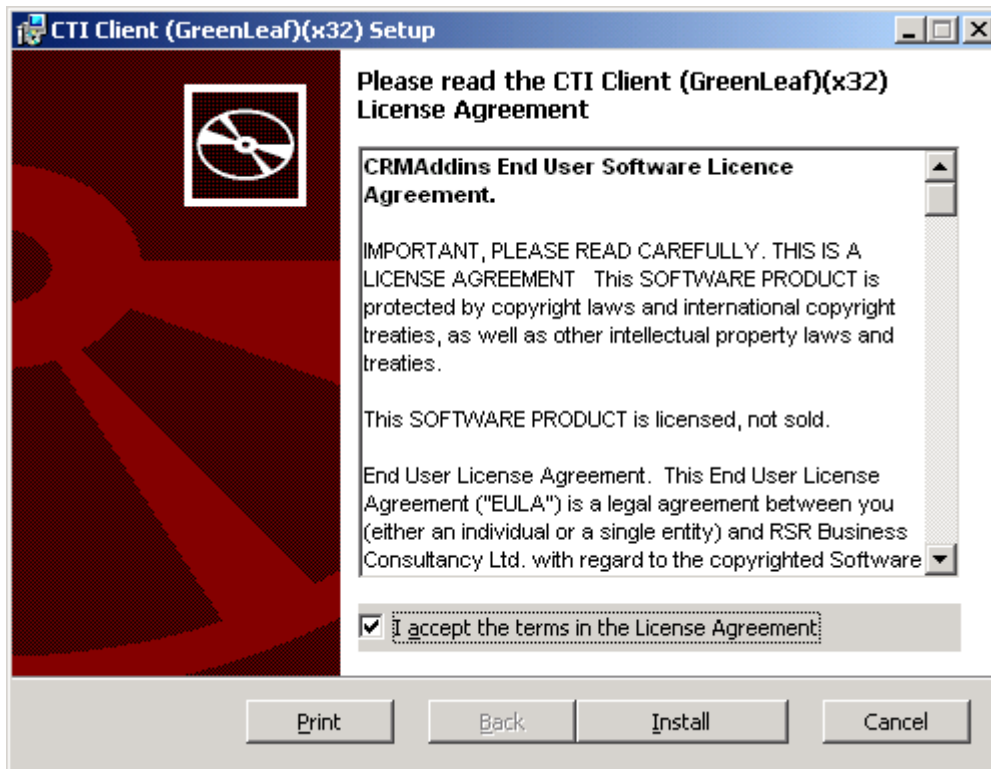


Client installation steps.

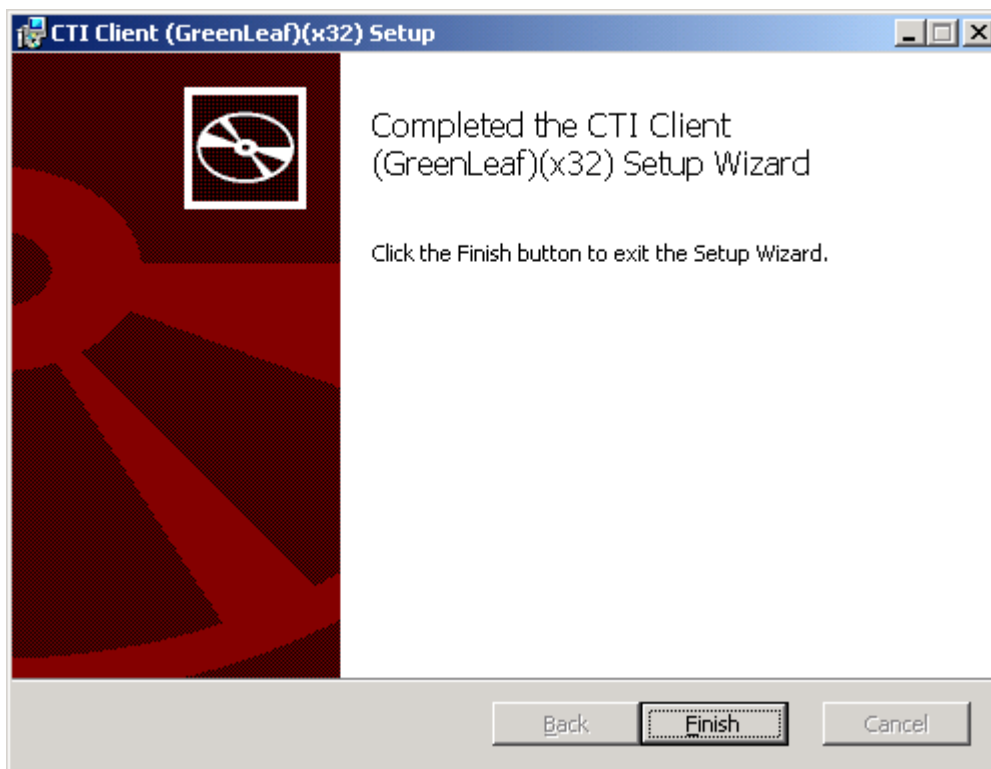
1. Install or upgrade to Internet Explorer 8 if required.
2. Install or upgrade .NET framework 3.5
3. Save the Self extracting file to an appropriate folder, this could be a shared folder on a server to allow the software to be easily access for installation on multiple workstations.
4. From the workstation navigate to the folder where the installation files have been saved and double click on the relevant MSI file (x86 or x64) or select run from the start menu and enter the path name for the MSI file.



5. You will see the following screen, where you will then be presented with the license agreement, if you do not accept the licence agreement, select cancel to cancel the installation, if you accept the license agreement, select the tick box and click on the Install button to continue and the installation will proceed.



6. When the installation has completed select Finish





7. Installation is now complete. The next step will be to configure CRM and the CTI application.



Additional Configuration

- CRM Configuration
- CTI Application Configuration

CRM Configuration

In the entity that you wish to activate CTI functionality the following script will need to be added to the OnLoad script to activate the CTI functionality and add the click to dial button to the selected fields.

```
{  
  var oXML = new XMLHttpRequest();  
  oXML.open('GET', '/ISV/RSR/CTI/ctirsrcore.js?nocache=' + Math.random(), false);  
  oXML.send("");  
  eval(oXML.responseText);  
  
  addCTILink('telephone1_d');  
  addCTILink('telephone2_d');  
}
```

In the above example the fields Main Phone and Other phone have been CTI enabled, see below.

The screenshot shows the 'Account: New' form in Microsoft Dynamics CRM 4. The 'Information' tab is selected, and the 'Main Phone' and 'Other Phone' fields are highlighted with a small blue icon, indicating they are CTI-enabled. The form includes fields for Account Name, Account Number, Parent Account, Primary Contact, Relationship Type, Address (Street 1, 2, 3, City, County, Post Code, Country), and CPD History.



Any field can be added including custom fields.

The script below activates the custom field Business phone 2 in the screen below.

```
if (crmForm.FormType==2)
{
var oXML = new XMLHttpRequest();
oXML.open('GET', '/ISV/RSR/CTI/ctirscore.js?nocache=' + Math.random(), false);
oXML.send("");
eval(oXML.responseText);

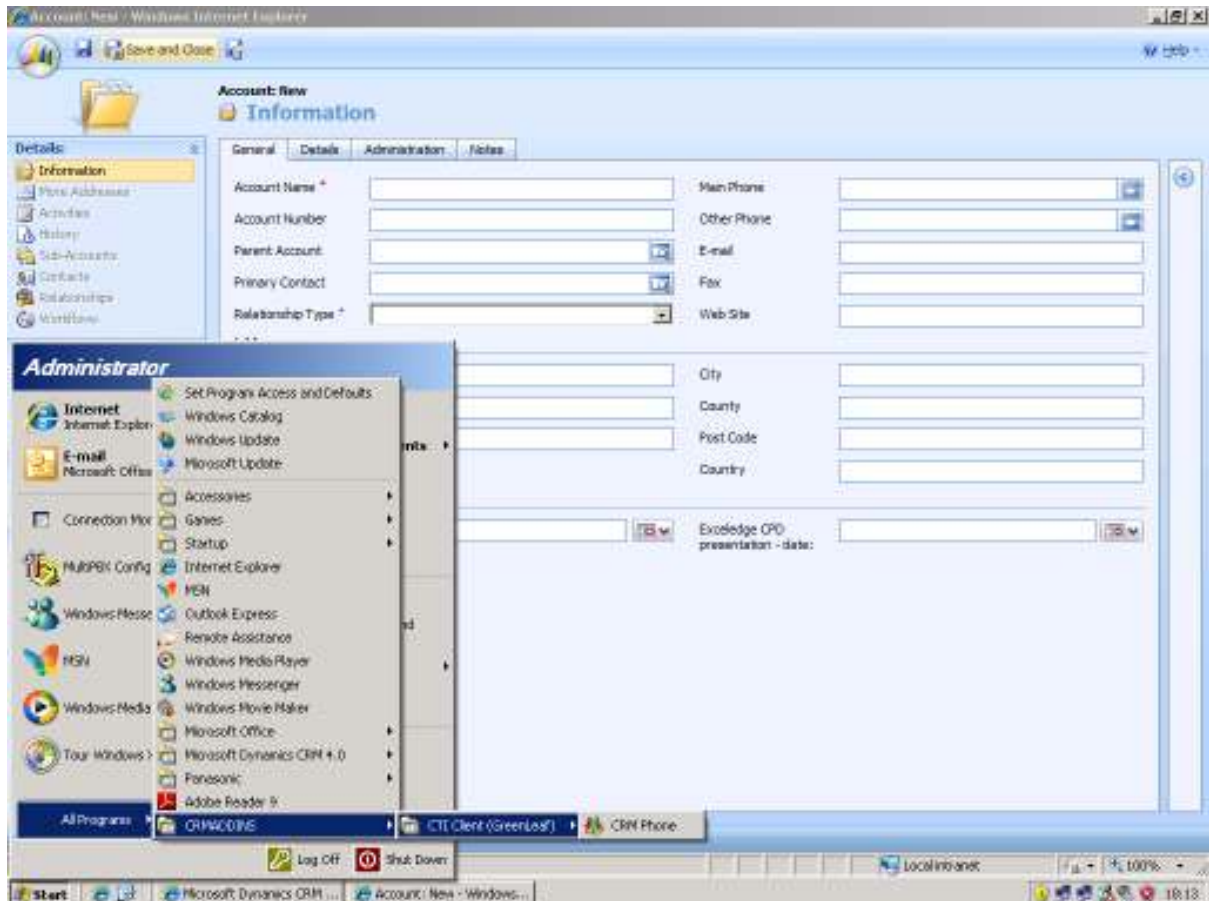
addCTILink('telephone1_d');
addCTILink('cus_businessphone2_d');
addCTILink('telephone3_d');
addCTILink('mobilephone_d');
}
```

The screenshot shows the 'Lead: Roland Moore' record in the Microsoft Dynamics CRM 4 web interface. The 'Information' tab is selected, and the 'Business Phone 2' field is populated with the number '0785 322 9771'. A 'Dial number CTI' button is visible next to the Mobile Phone field. The interface includes a left-hand navigation pane with sections for 'Details' (Information, Activities, History, Workflows) and 'Marketing' (Marketing Lists, Campaigns). The status bar at the bottom indicates 'Status: Open' and 'Done'.



CTI Configuration

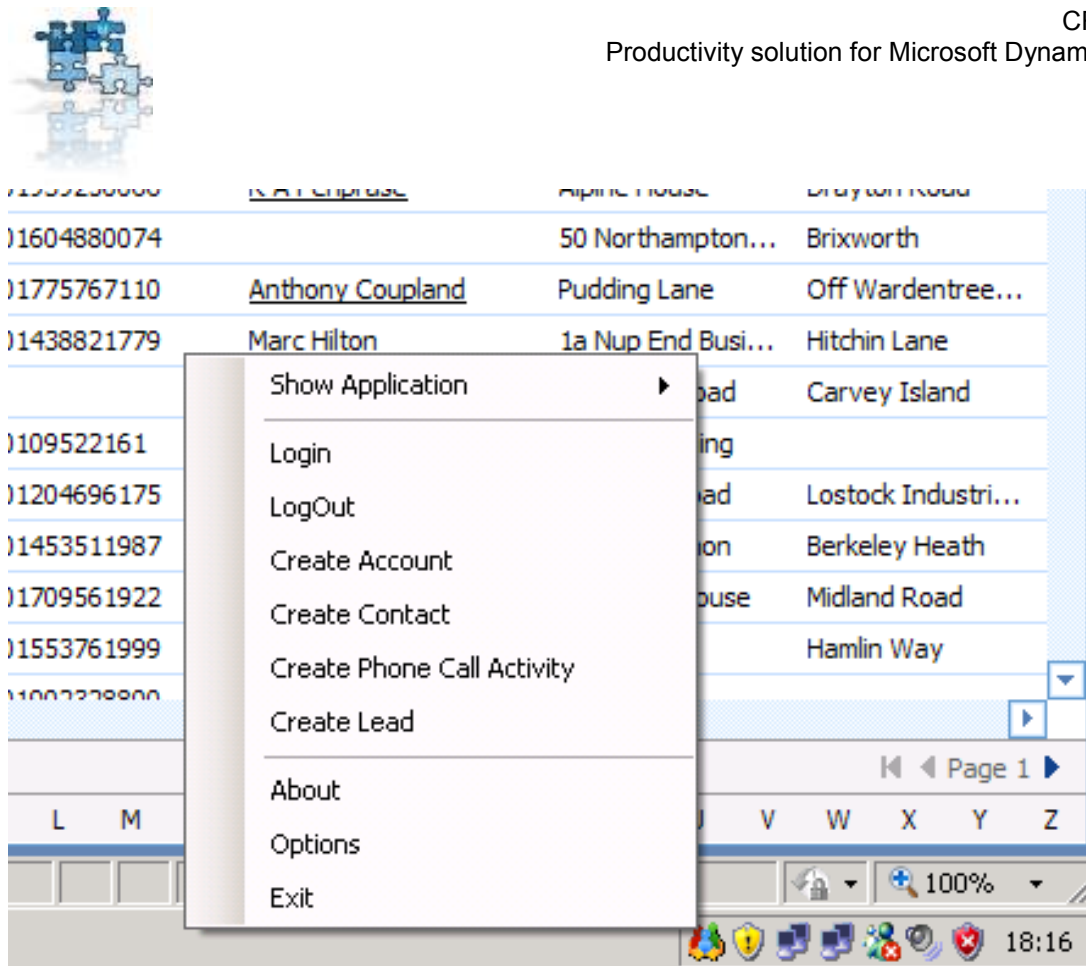
Starting the CTI application can be carried out automatically by placing a short cut in the start-up folder or by starting it from its program folder.



Once the CTI application is running it will be seen in the system tray.



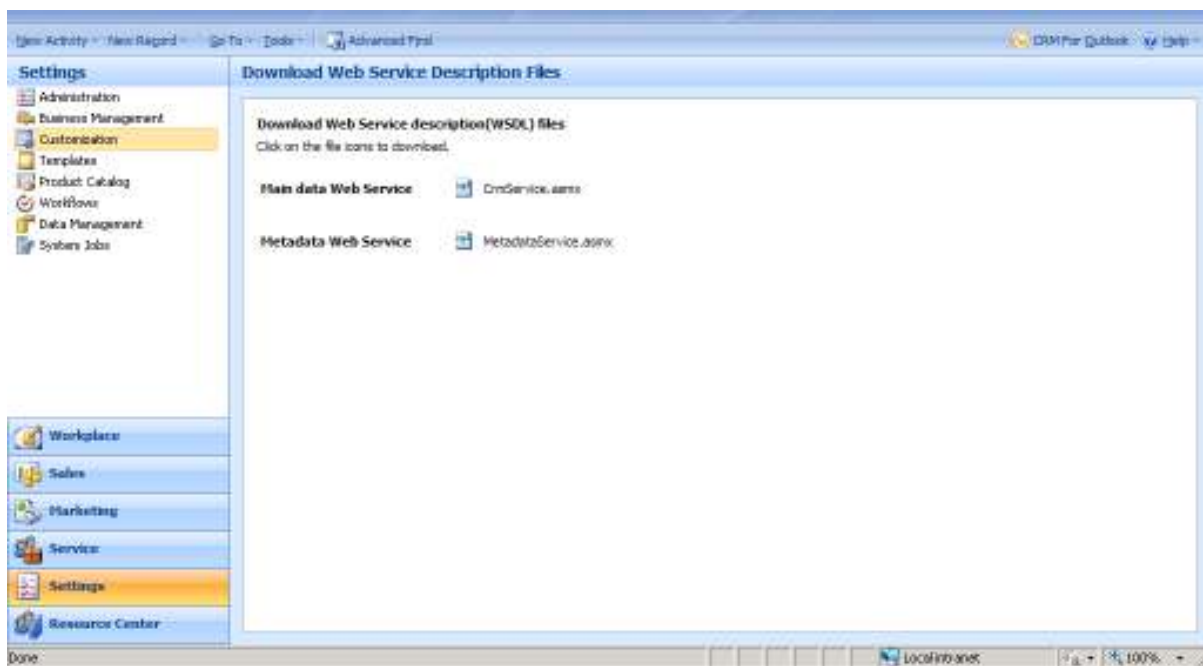
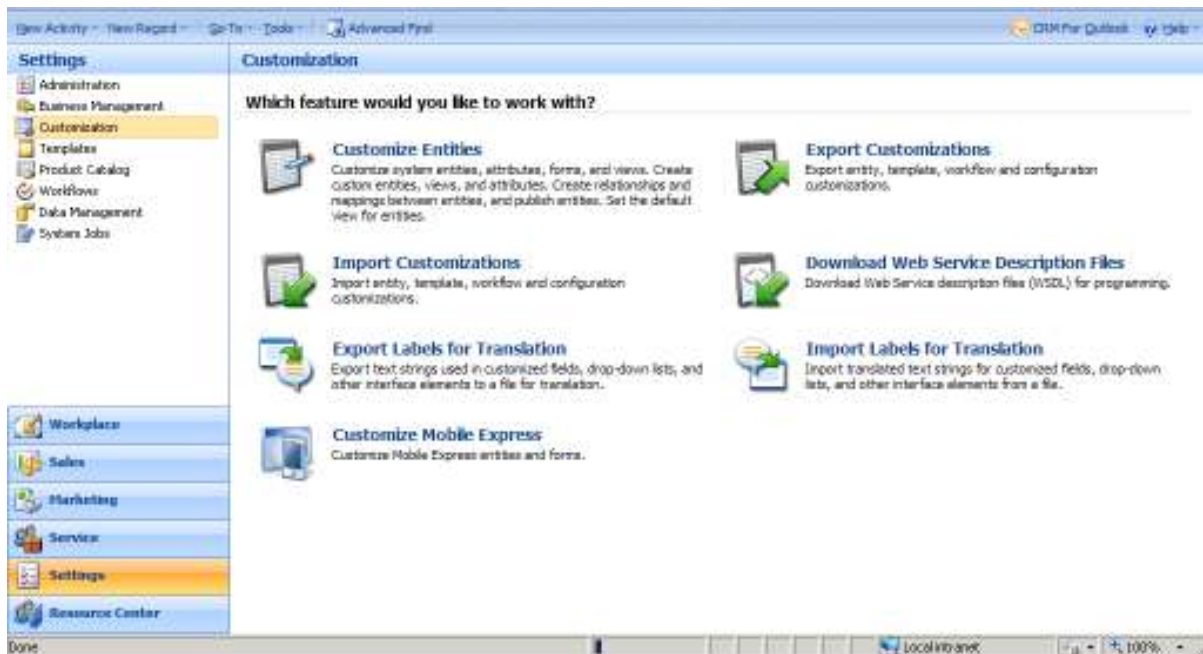
To configure the CTI application right click on it and select options.



You will need to enter the following details

- CRM Organisation Name
- CRM server name and port if applicable.
- CRM Web Services URL
- CRM Metadata URL

Can be verified in your CRM system by checking the Web Services Description files in the customisation are of you CRM system



Examples of the complete Settings are shown below.

The follow details can be found at the end of the Main data Web Service file that can be opened by clicking on the icon for the CrmService.ASMX in the above screen.

```
- <wsdl:service name="CrmService">  
- <wsdl:port name="CrmServiceSoap" binding="tns:CrmServiceSoap">  
  <soap:address  
location="http://SERVERNAME:PORTNUMBER/MSCrmServices/2007/CrmService.asmx" />  
  </wsdl:port>  
- <wsdl:port name="CrmServiceSoap12" binding="tns:CrmServiceSoap12">  
  <soap12:address location="http://SERVERNAME:PORTNUMBER  
/MSCrmServices/2007/CrmService.asmx" />
```



```
</wsdl:port>  
</wsdl:service>  
</wsdl:definitions>
```

The follow details can be found at the end of the Metadata Web Service file that can be opened by clicking on the icon for the MetadataService.ASMX in the above screen.

```
<wsdl:port name="MetadataServiceSoap" binding="tns:MetadataServiceSoap">  
  <soap:address location="http://SERVERNAME:PORTNUMBER  
/MSCrmServices/2007/MetadataService.asmx" />  
</wsdl:port>  
- <wsdl:port name="MetadataServiceSoap12" binding="tns:MetadataServiceSoap12">  
  <soap12:address location="http://SERVERNAME:PORTNUMBER  
/MSCrmServices/2007/MetadataService.asmx" />  
</wsdl:port>  
</wsdl:service>  
</wsdl:definitions>
```

Environment Tab.

The screenshot shows the 'Settings' dialog box with the 'Enviroment' tab selected. The 'Deployment' section has a dropdown menu set to 'On-premise deployment'. Below it are three checkboxes: 'Integrated Active Directory authentication' (checked), 'Forms based authentication' (unchecked), and 'Windows Live ID authentication' (unchecked). There are input fields for 'User Name' and 'Password'. A checked checkbox 'Login to MS CRM automatically' is present. The 'Organization' section has an input field for 'CRM organisation Name'. The 'Crm Server URL' section has an input field with the text 'http://servername:port number if required'. The 'Crm Service URL' section has an input field with the text 'http://servername:port number if required/MSCrmServices/2007/Cr'. The 'Crm Metadata Service' section has an input field with the text 'http://servername:port number if required/MSCrmServices/2007/M'. At the bottom, there are buttons for 'Export', 'Import', and 'Auto Discover'. At the very bottom, there are buttons for 'Reset', 'Save', and 'Cancel'.



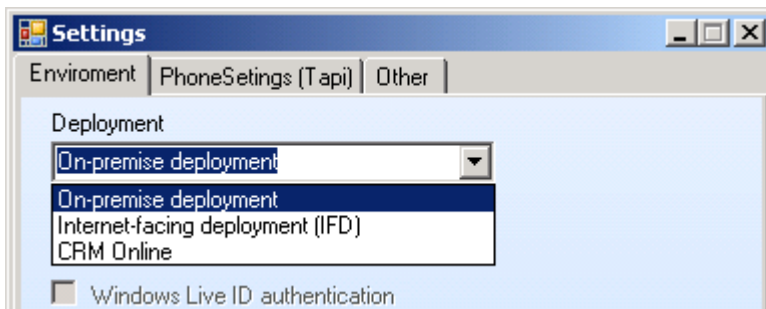
The two URL are typically

`http://SERVERNAME:PORTNUMBER/MSCrmServices/2007/CrmService.aspx`

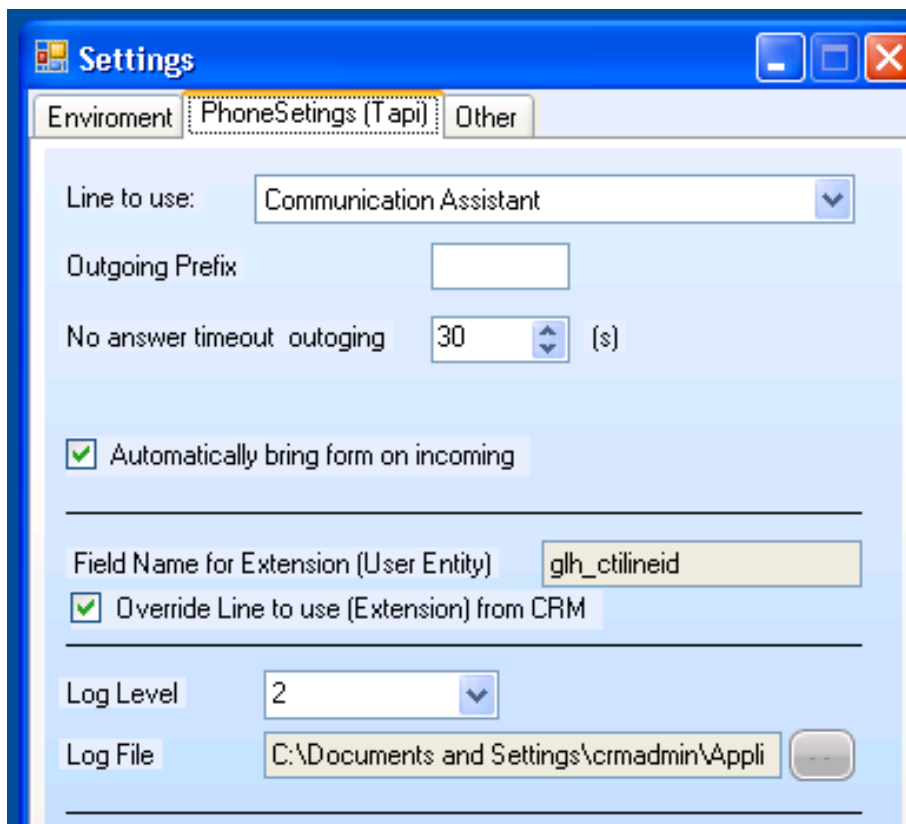
`http://SERVERNAME:PORTNUMBER/MSCrmServices/2007/MetadataService.aspx`

Additional option for on Prise of hosted, if integrated authentication should be used and if the application should auto logon, this option is recommended especially if a shortcut to auto start the application is placed in the start-up folder.

Deployment options are shown below.



Phone Setting (Tapi) Tab



Select the line to use; this will be your TAPI application or driver.



If no TAPI driver is displayed either:-

1. There is no TAPI driver installed on the workstation or
2. The TAPI driver is specific to the phone system that is in use.

If no TAPI driver is installed please install and configure as per your phone system suppliers documentation.

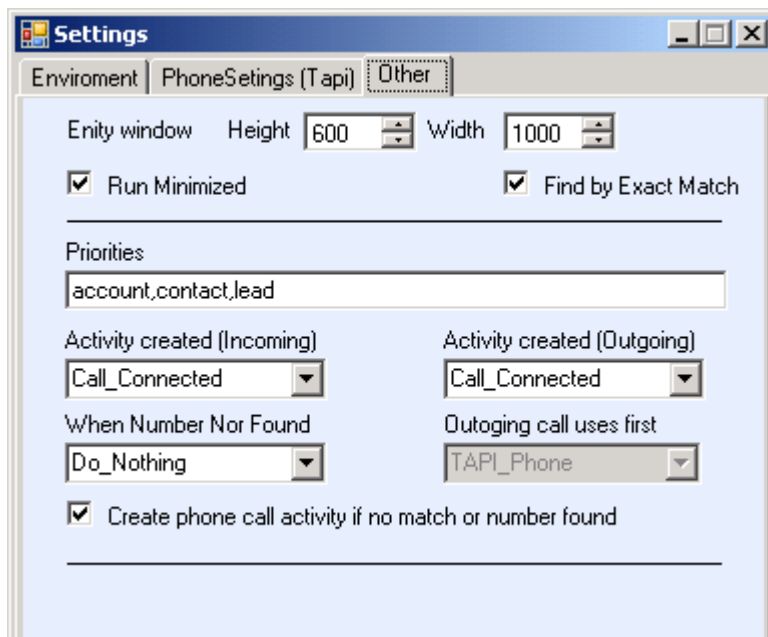
If a TAPI driver is installed and not recognised, please contact CRMAddins so that we can update the CTI solution for your phone system.

Enter an outgoing prefix, the code or number to obtain an outside line.

All other setting on the tab should be set to match those shown in the example above.

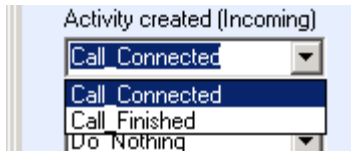
Other Tab

The other tab setting configure the way the CTI application handles the creation of Phone call activities, how unknown numbers are handled for phone call activities and which entities to search for phone number and the order in which the entities are searched.



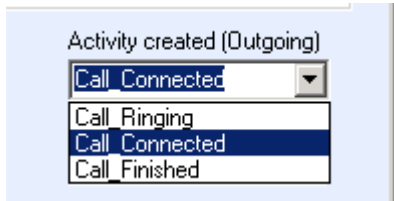
- Run minimised: configure the CTI application to not open when it is processing calls.
- Find exact Match: will only open phone call activities if a phone number is an exact match to the one being presented by the caller.
- Priorities: the entities that will be search and the order that they are searched in, please note that spaces are not permitted and that the entity name must be the name within the CRM system and not the display name.
- Activity created (incoming and Outgoing) the option are

Incoming



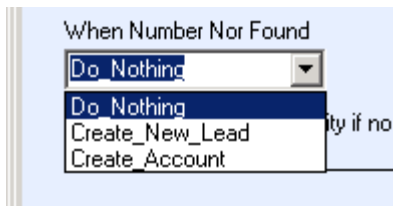
Create a phone call activity when a call is connected or when a call is finished.

Outgoing.



Create a phone call activity when a call is connected, ringing or when a call is finished.

When a number is not found.



Options are do nothing if a number is not found or create a lead or account record automatically.

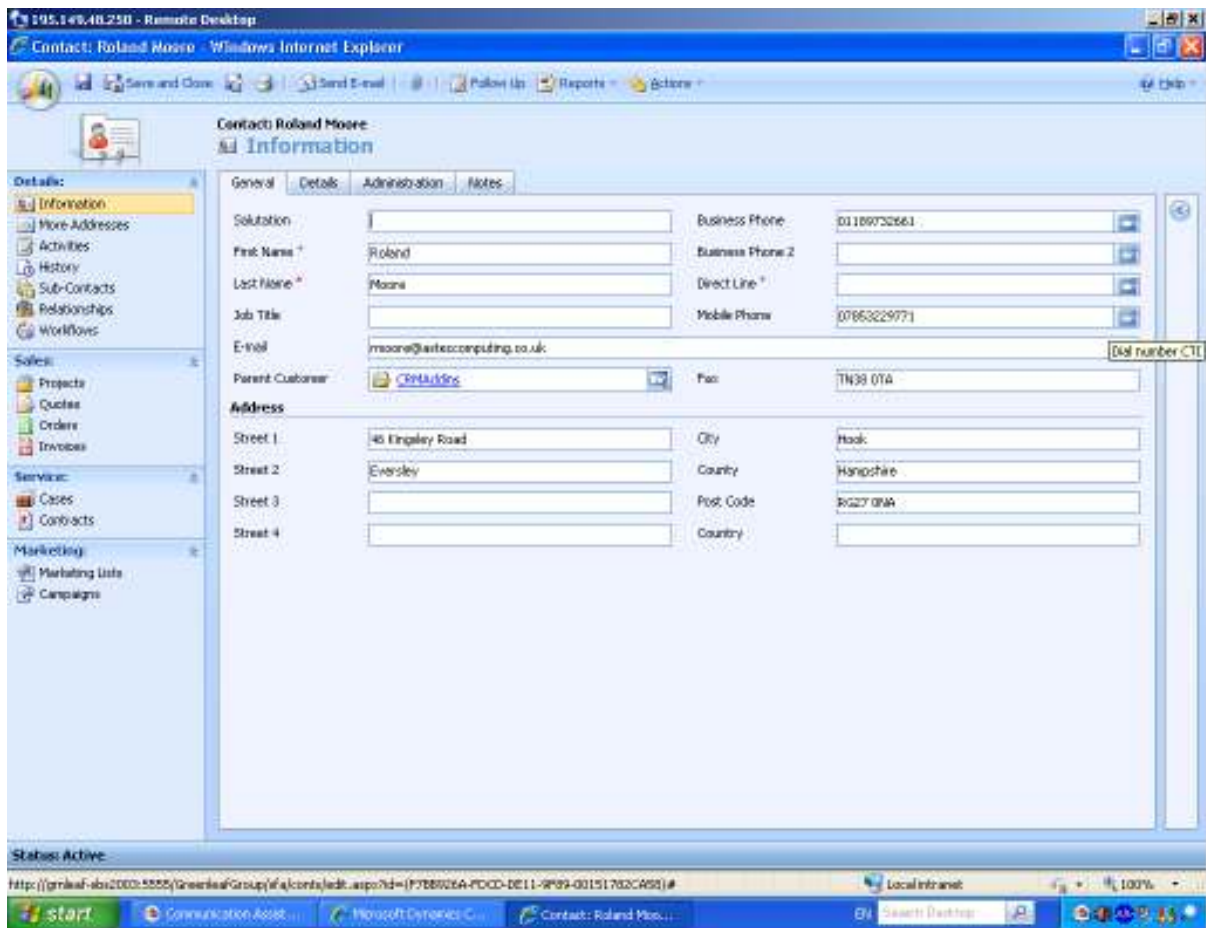
The settings shown above are those that are normally recommended.



CTI in Action.

Dialling a call.

To place a call, select the click to dial icon at the end of the number.



The number will be dialled.



195.149.48.230 - Remote Desktop
Contact: Roland Moore - Windows Internet Explorer

Save and Close | Send E-mail | Follow Up | Reports | Actions

Contact: Roland Moore
Information

Details: Information | More Addresses | Activities | History | Sub-Contacts | Relationships | Workflows

Sales: Projects | Quotes | Orders | Invoices

Service: Cases | Contracts

Marketing: Marketing Lists | Campaigns

General | Details | Administration | Notes

Solution: Business Phone: 01189732661
First Name: Roland Business Phone 2:
Last Name: Moore Direct Line:
Job Title: Mobile Phone: 07953229771
E-mail: moore@articscomputing.co.uk **Dial number CTR**
Parent Customer: CRMAddins Fax: TN39 0TA

Address
Street 1: 46 Kingsley Road City: Hook
Street 2: Eversley County: Hampshire
Street 3: Post Code: RG27 0NA
Street 4: Country:

Status: Active

Outgoing Call
Calling ... 07953229771

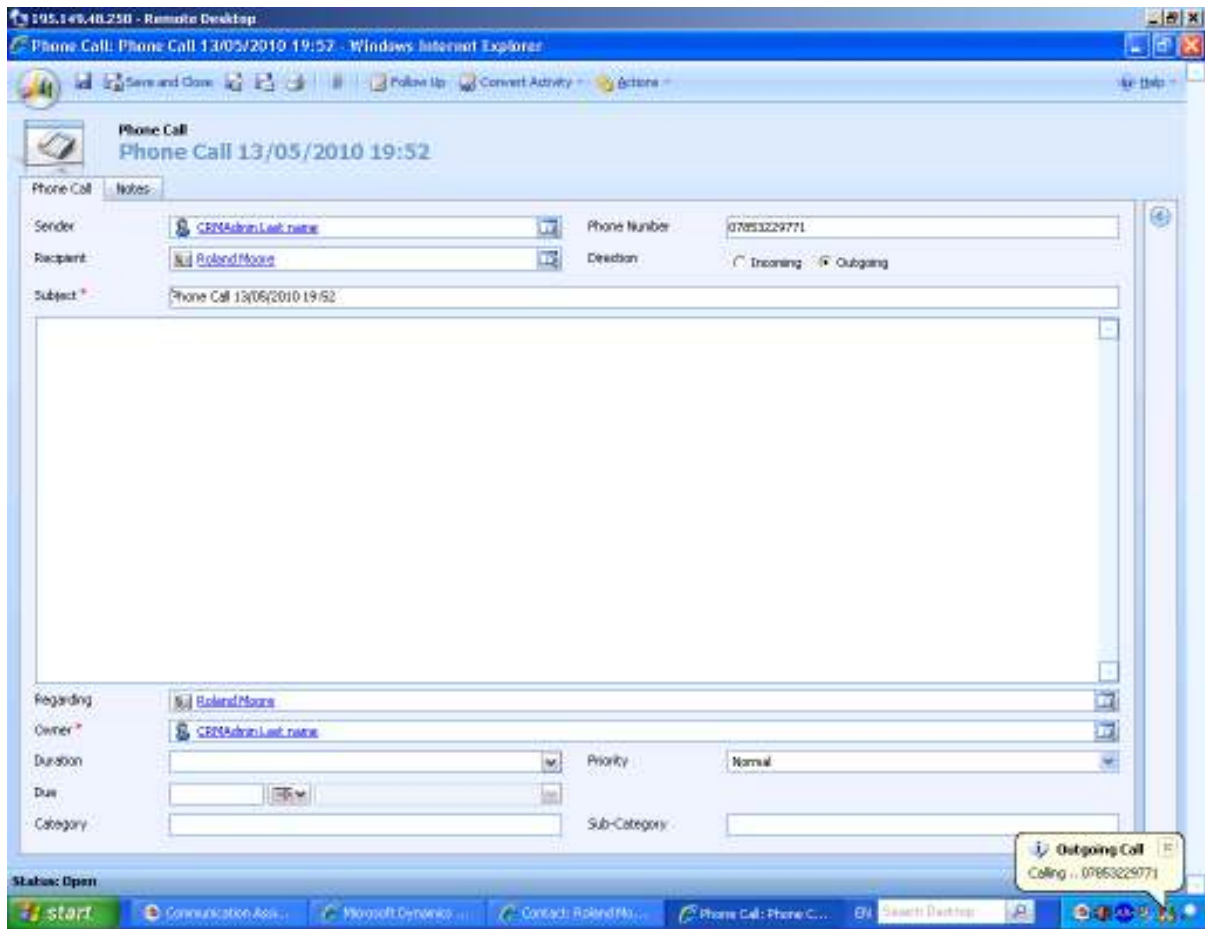
http://crm4f-ab2000-5555/GreenleafGroup/af/a/conts/edit.aspx?id={P7B8826A-FDCC-DE11-9P99-00151762C492}#

start | Communication Asses... | Microsoft Dynamics C... | Contact: Roland Moo... | Local intranet | Search Desktop

Outgoing Call
Calling ... 07953229771

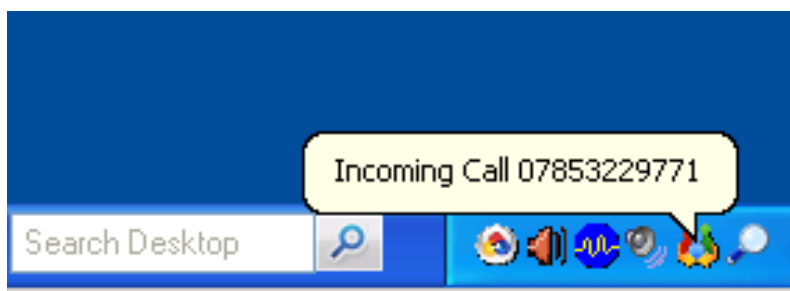
Local intranet | Search Desktop

When the call is answered a phone call activity will be created.



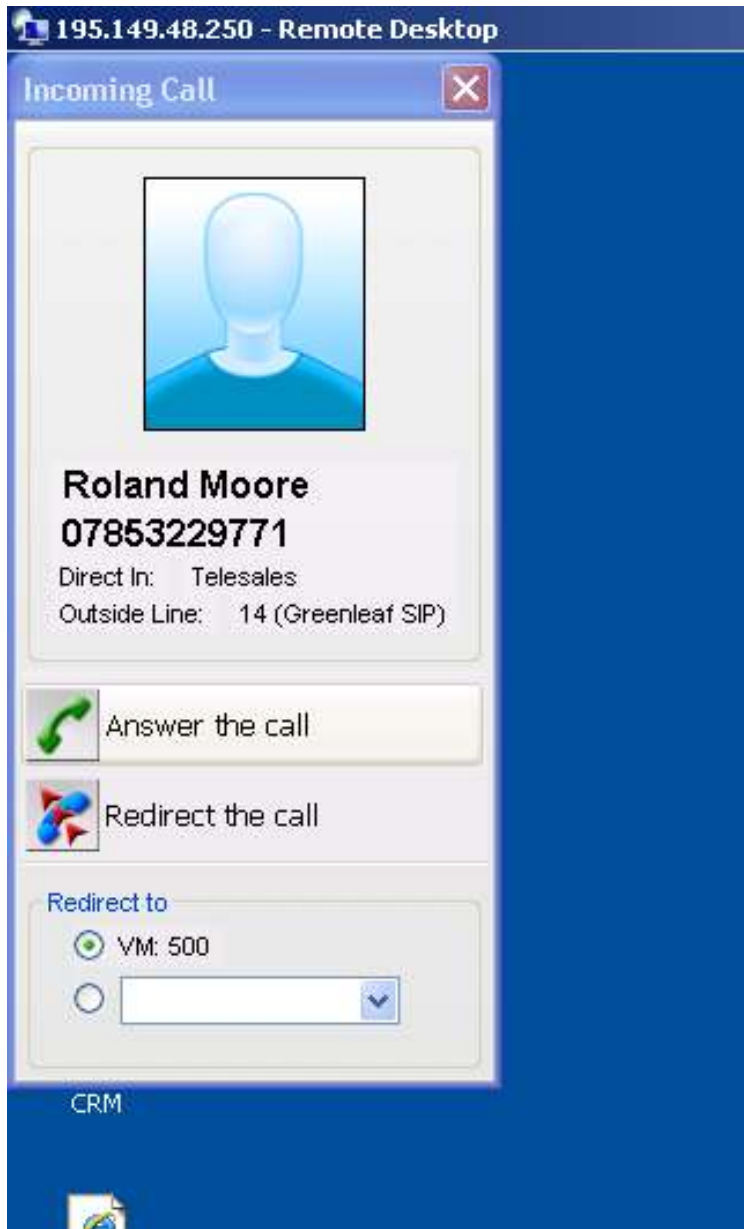
Receiving a call.

When a call is placed to the user the Phone system will present the call to be answered and the CTI application will display that an inbound call is taking place, this will happen even if CRM is not running.





The follow screen is an example of what your CTI application may also show if it is installed, the example shown is from a Panasonic Communications Assistant application and exact displays and functionality will vary depending upon the phone system that is in use.



When the call is answered a CRM Phone Call activity is created and populated.



195.149.48.238 - Remote Desktop

Phone Call: Phone Call 13/05/2010 19:54 - Windows Internet Explorer

Phone Call
Phone Call 13/05/2010 19:54

Phone Call Notes

Sender: Roland Moore Phone Number: 07053229771
Recipient: CRMAdmin.Lead.name Decision: Incoming Outgoing
Subject: Phone Call 13/05/2010 19:54

Regarding: Roland Moore
Owner: CRMAdmin.Lead.name
Duration: Priority: Normal
Due: Category: Sub-Category:

Status: Open

start Communication Assst... Phone Call: Phone Ca... Search Desktop



Removing CRMAddins CTI.

There are two step to removing the CTI application.

Step 1 is to remove the OnLoad customisations.

Step 2 is to uninstall the CTI application from the PC using Add – Remove programs.