



c360 Telephone Integration (CTI)

Microsoft Dynamics CRM 4.0 compatible

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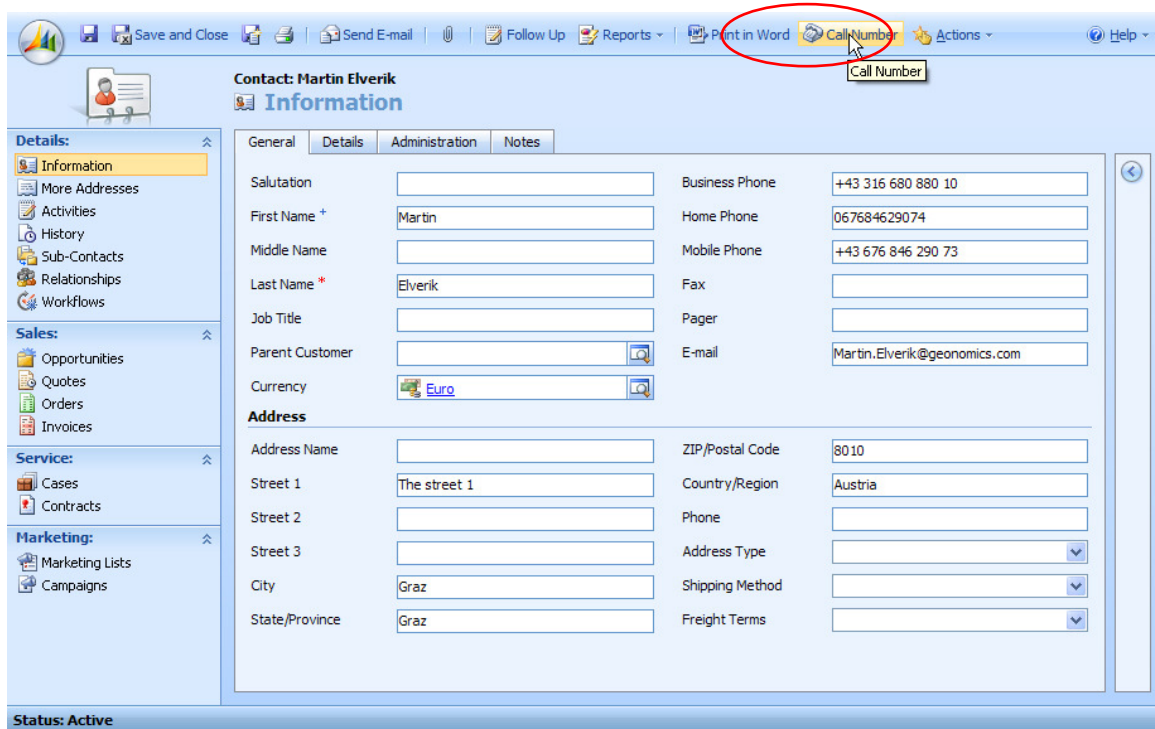
Introduction

Telephone Integration for Microsoft CRM 4.0 (**CTI**) enables you to connect your Telephone System (CTI) to Microsoft CRM 4.0. with bi-directional functionality that is easy to use. With incoming calls, CTI shows you the name (if matched in CRM) and on lifting the handset the Contact/Account record opens. Also, an incoming phone activity will be created. With outgoing calls, CTU will dial the number for you and create a phone activity for documentation.

User Instructions

Outgoing Calls

1. Navigate to a CRM account or contact. Click on 'Call Number'.



The screenshot shows a CRM interface for a contact named Martin Elverik. The top toolbar contains several icons, with the 'Call Number' icon circled in red. Below the toolbar, the contact's information is displayed in a form with tabs for General, Details, Administration, and Notes. The form includes fields for personal and business information, as well as address details.

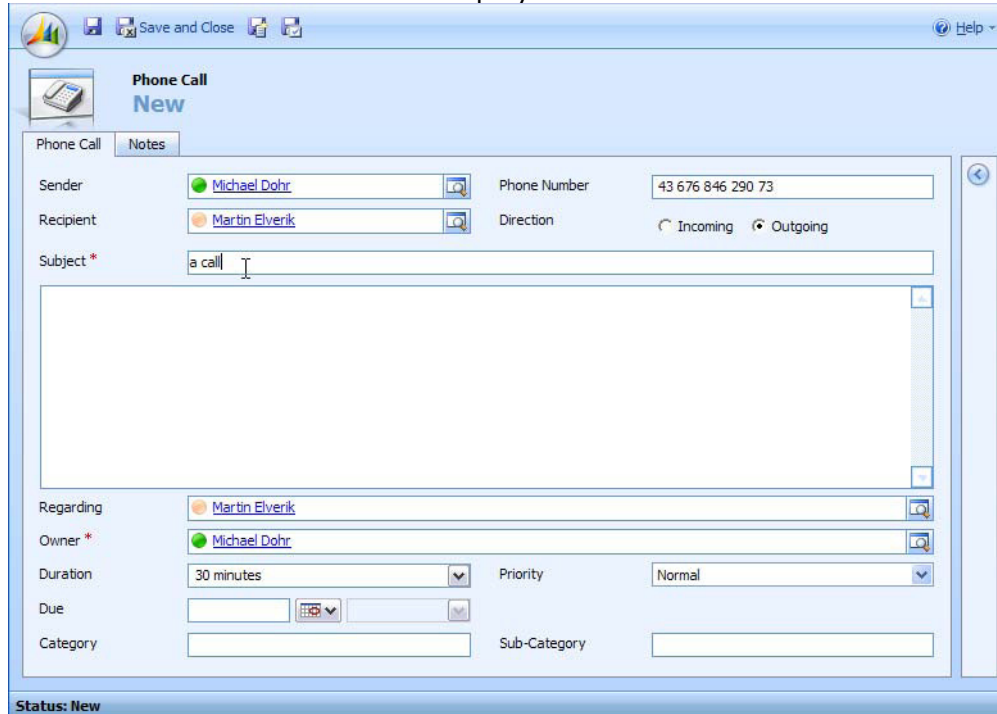
Contact: Martin Elverik	
Information	
Salutation	
First Name +	Martin
Middle Name	
Last Name *	Elverik
Job Title	
Parent Customer	
Currency	Euro
Business Phone	+43 316 680 880 10
Home Phone	067684629074
Mobile Phone	+43 676 846 290 73
Fax	
Pager	
E-mail	Martin.Elverik@geonomics.com
Address	
Address Name	
Street 1	The street 1
Street 2	
Street 3	
City	Graz
State/Province	Graz
ZIP/Postal Code	8010
Country/Region	Austria
Phone	
Address Type	
Shipping Method	
Freight Terms	

Status: Active

2. A dialog box with available numbers opens.



3. Select the Number you want to call and click [OK] OR activate the call by double clicking on the number. While the phone is calling the number, a new call activity is being created. If the Telephone Integration is started, the outbound call will be noted and display.



Incoming Calls

When CTI is activated, an icon displays in your system tray.







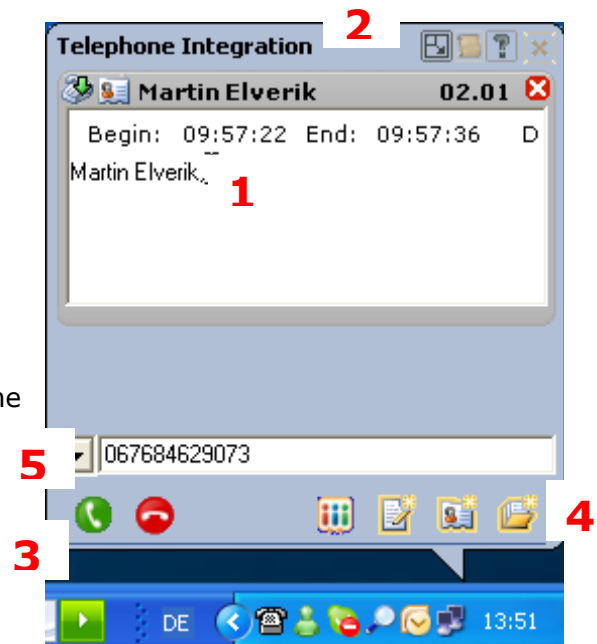
Balloon Elements

The balloon is the central element on the client side. This balloon displays all available call information (*see Call Details*). The 5 Sections identified in the image to the right are:



- (1) Call Area
- (2) Balloon functions
- (3) TAPI functions
- (4) CRM functions
- (5) Call function

1. **Call Area:** See the following section on 'Call Details'
2. **Balloon:**

-  a. Enable Custom Sizing: click to enable controls to expand/contract the window. Click again to disable.
-  b. Show History
-  c. Help
-  d. Close Balloon Window



3. **TAPI functions:**

-  Pick up receiver/answer call
-  Disconnect

4. CRM functions:



Open the CRM entity assigned to the call. If no entity is specified because no one match has been found, the action will open a lookup for that entity.



Create a new activity for the call on the parent entity record



Create a new contact based on the phone number



Create a new account based on the phone number

5. Call functions:



Hide/Unhide the call Field

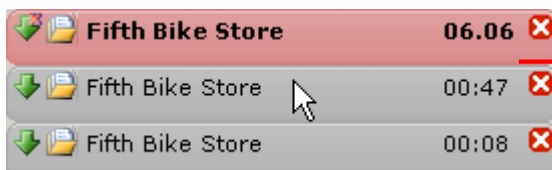
Call Details

The call area contains the single call elements either received or initiated by CTI.

The basic call window contains 2 Icons on the left side, indicating item lookup-state and call state, an information area showing begin and end-date for the call, and a call duration stopwatch at the top right hand corner. The detail area shows the selected display fields of the CRM entity as defined on the server.











Color coding indicates missed incoming calls. The call time is replaced by the date of the call. Expand the call to show when the missed call occurred.








Call State Icons

The following icons may display to indicate call state:

	Outgoing call is dialing but not connected
	Incoming call awaits pick-up
	Call is connected
	Finished inbound call
	Missed incoming call; The color of the call element also changes at this time
	Finished outbound call
	An outbound call was placed with no answer
	A call has been re-directed to you or by you

CRM State Icons

	CRM lookup has been initiated
	The telephone number search returned more than one result (see multiple targets)
	The CRM lookup has returned an account entity
	The CRM lookup has returned a lead entity
	The CRM lookup has returned a different type of CRM entity

Handling Multiple Targets

If the CRM-search for a number returns multiple targets, a detail window is displayed on lifting the handle, showing all possible choices. If a call with multiple targets has been missed, click the "Open in CRM" – button (*see CRM functions*).

The detail window shows all possible entries with an icon according to their entity-type. Click on the "To balloon" button or double click the desired entity to assign the selected entity to the call.

By entering a value into the Filter field, the entities are filtered for this value. The Filter works instantaneously. To remove, just clear the textbox.



Once an entity is selected for the call (either by finding a single match in CRM, or by selecting one target from the multiple targets window) associated CRM-Windows might be opened, depending on your settings.

NOTE:

- To enable this function, "allow unsigned ActiveX" option must be activated inside Internet Explorer.
- See **Configuration** to define desired behavior

Balloon Elements Display

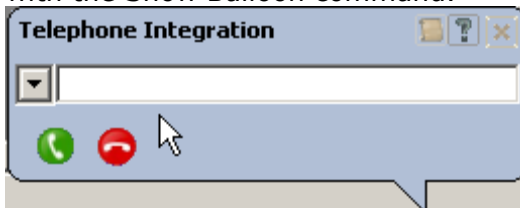
In the "simple" view, the CTI functions with alert pop-ups similar to the Microsoft Outlook client.



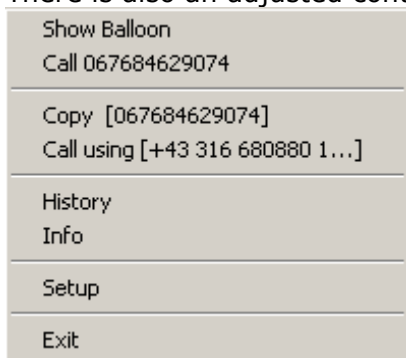
The information on the popup will be updated with information provided by the TAPI Driver and, if existing, the CRM contact information.

The telephone symbol on the left side will indicate if the call is incoming or outbound. Click on the CRM icon or the name of the entity record (displayed in red) to open the CRM record

The callout control can still be reached via a double click on the CTI component or with the Show Balloon command.

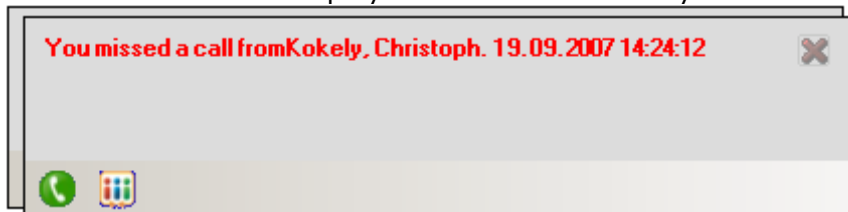


There is also an adjusted context menu:



1. Repeat or call back the last number
2. Copy the last number to the clipboard
3. Use the clipboard content to call a number
4. Open History

Missed calls are also displayed as notifications on your screen:



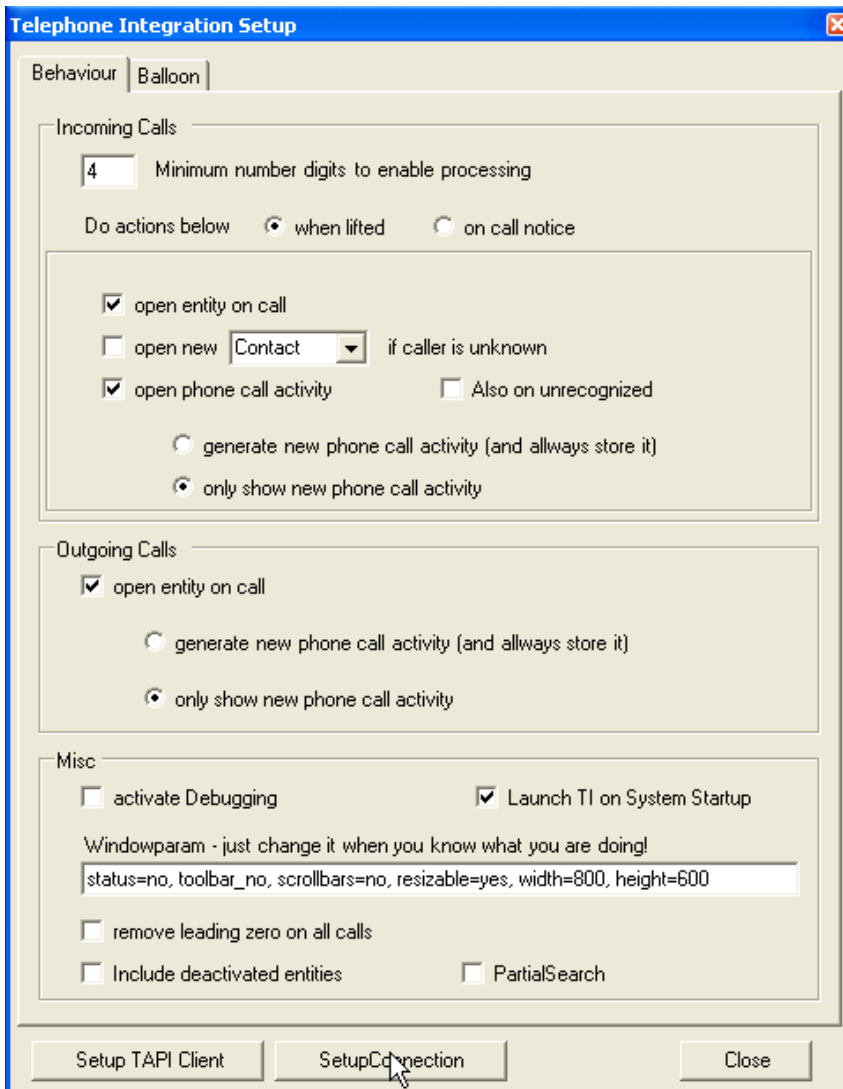
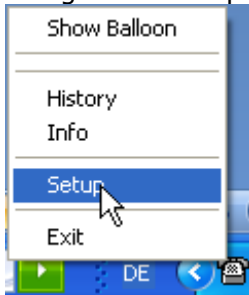
You can:

1. Close the missed call notification by clicking the red cross
2. Call back using the receiver symbol on the notification
3. Open the CRM-entity by clicking on the CRM logo on the notification

Settings and Configuration

Configuration

To adjust configuration settings, right click on the context menu to access 'Telephone Integration Setup'.



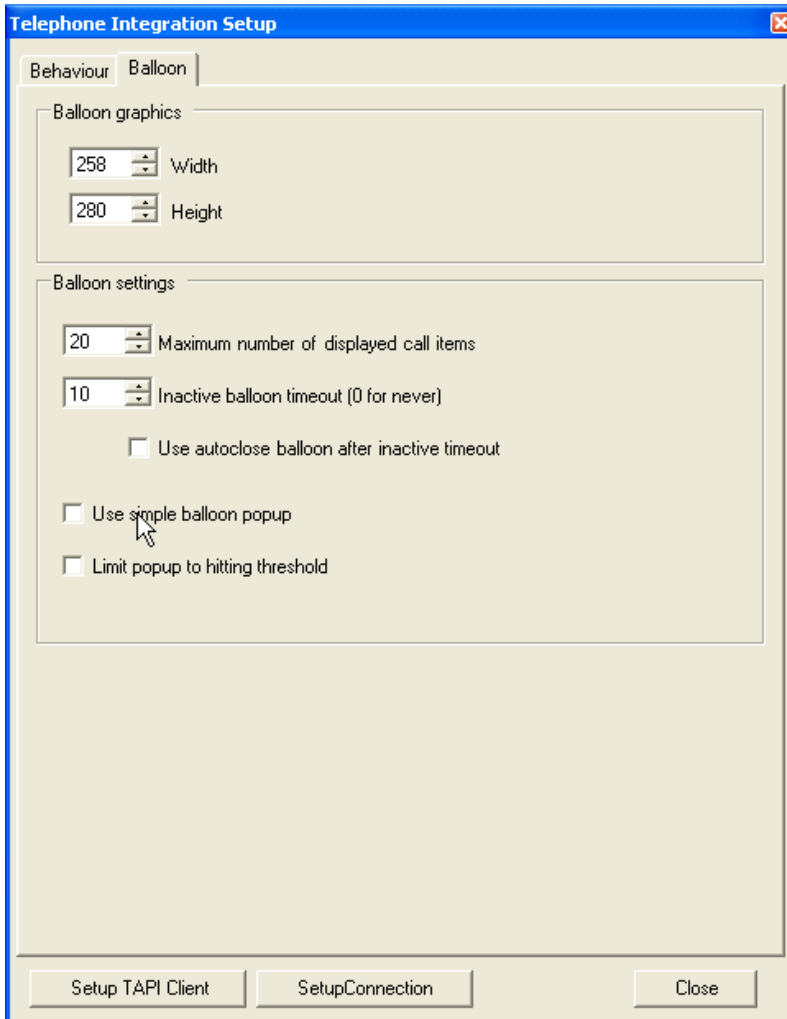


Behavior Tab

Incoming/Outgoing Calls	
Minimum number digits to enable processing	Defines the minimum number of digits that must be dialed to enable call processing. Calls that have less than the desired amount of digits will not be checked in CRM for caller-information.
Open entity on Call	Searches CRM for an account/contact match with the incoming number and opens the entity record if found
Open new <Entity> if caller is unknown	If no match is found for the incoming number, open a new entity record to be completed
Open phone call activity	Generates a new phone call activity, opening it for documentation
Also on unrecognized	Opens a phone call activity, even when the incoming number is not matched in CRM
Generate new phone call activity (and always store it)	Opens the phone call activity designated above and saves it automatically
Only show new phone call activity	Opens the phone call activity designated above but does not automatically save it
Misc	
Activate debugging	Check box to activate debugging functionality
Windowparam	Change the start settings of the CTI window – status, size, resizable, scrollbars etc.

Balloon tab

Set the dimensions of the balloon graphics and define the behavior of the balloon.



Telephone Integration Setup

Behaviour Balloon

Balloon graphics

258 Width

280 Height

Balloon settings

20 Maximum number of displayed call items

10 Inactive balloon timeout (0 for never)

Use autoclose balloon after inactive timeout

Use simple balloon popup

Limit popup to hitting threshold

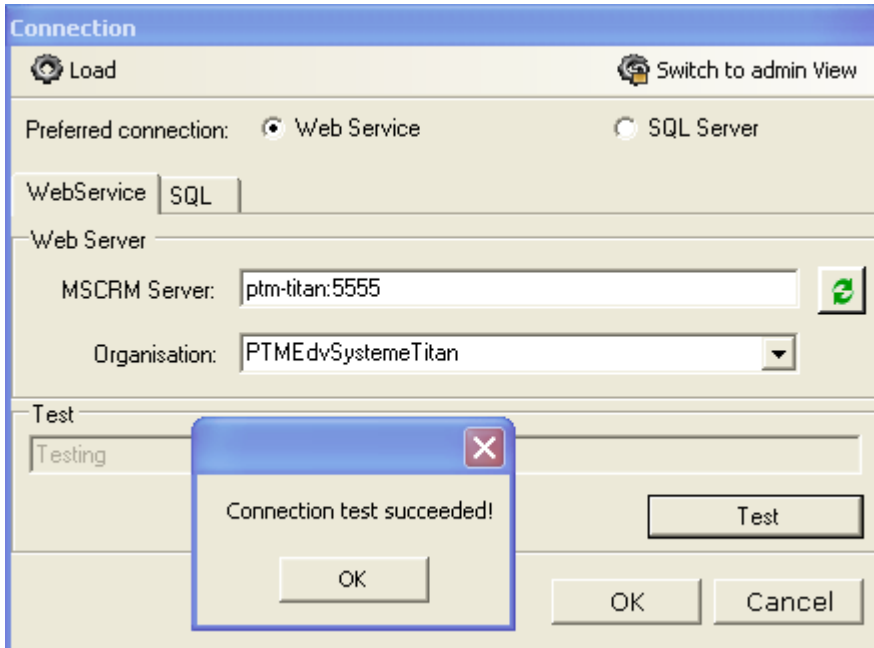
Setup TAPI Client SetupConnection Close

'Inactive balloon timeout' defines the time span, after which the balloon disappears if no action is taken. Selecting an item or a function on the balloon prevents the timeout.

NOTE: an easier way to resize the balloon is by using the resize function on the balloon window (see p.6 Balloon Elements).

Server Settings

Switch to admin view to see detailed information regarding testing and possible errors.



The screenshot shows a 'Connection' dialog box with the following elements:

- Load** button and **Switch to admin View** button.
- Preferred connection:** Web Service, SQL Server.
- Tabbed interface with **WebService** and **SQL** tabs.
- Web Server** section:
 - MSCRM Server:** with a refresh icon.
 - Organisation:** with a dropdown arrow.
- Test** section:
 - Testing** tab.
 - Test** button.
 - OK** and **Cancel** buttons.

A modal dialog box is overlaid on the 'Test' section, displaying the message: **Connection test succeeded!** with **OK** and **Cancel** buttons.

CRM Server Example

Connection


Load New Save Delete Switch to user View

Preferred connection: Web Service SQL Server

WebService SQL

SQL Server

Profiles: PTM-EDV\mdohr 14012008_114130

Server: PTM-TITAN 

Catalogs: PTMEDvSystemeTitan_MSCRM

Integrated security Supply User

Test

```
[SQL.ctor] initiate Provider=sqloledb;packet size=4096;integrated
security=SSPI;data source=PTM-TITAN;initial
catalog=PTMEDvSystemeTitan_MSCRM;
[SQL.ctor] Create connection
[SQL.ctor] open connection
[SQL.ctor] finished
[SQL.GetCurrentUser] init
[SQL.GetCurrentUser] init
[SQL.GetCurrentUser] getting user PTM-EDV\mdohr
[SQL.GetCurrentUser] sql: SELECT * FROM FilteredSystemUser where
DomainName = 'PTM-EDV\mdohr'
[SQL.GetCurrentUser] connected to db
```

Test

OK Cancel

SQL server example