



# **IP Office Microsoft<sup>TM</sup> CRM Integration**

## **Installation & User Manual**

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# IP Office Microsoft CRM

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## Introduction

The IP Office Microsoft™ CRM Integration software harnesses the capabilities of the Microsoft™ CRM Applications and IP Office. IP Office Microsoft CRM application uses Microsoft CRM to show caller information, using screen popping.

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## System Requirements

The following applications are required for the IP Office Microsoft CRM Integration software.

Application	Software Version	Server/Client
Microsoft CRM Server (Professional)	1.0	Server
IP Office Core	1.4 +	Telephone System
TAPI	1.0.0.16	Client
Microsoft .Net Framework	1.1	Client
IP Office Microsoft CRM Integration Client	1.4	Client
Internet Explorer	6.0 +	Client

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## Licences

The **Microsoft CRM Integration-Users** Licence is required for IP Office Microsoft CRM Integration. Refer to the IP Office Licence & Feature Keys Manual.

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## Hardware Requirements

We recommend the following PC Specification is used for Client applications.

Processor: Pentium 3

Clock Speed: 500MHz

Memory: 128 Mb

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# Installation

The IP Office Microsoft CRM Integration software requires several applications installed on the Client & Server PC. Refer to System Requirements.

The IP Office Microsoft CRM Integration software is supported on the following operating systems:

- Microsoft Windows 98SE™
- Microsoft Windows 2000™ Professional SP3™
- Microsoft Windows XP™ Professional

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## Server Integration

The IP Office Microsoft CRM Server Integration software is available from the IP Office User CD.

1. Insert the IP Office User CD into the CD Drive.
2. Select the IP Office Unit.
3. Selection of the User Name & Password are not required for IP Office Microsoft CRM Server Integration. Click **Next**.
4. The following message will be displayed **'You have not chosen a user name. Do you wish to continue ?'**
5. Click **Yes**
6. Select the Microsoft CRM Server Integration Software. Follow the on screen prompts.
7. At the completed installation screen click **Finish** to complete the installation.

The Server Installation adds the Out dialing capabilities into the Account/Contact screen.

The IP Office Microsoft CRM Server Integration software modifies the isv.config file and the web.config file to provide ISV integration. The server install assumes the isv.config file has not been modified by other ISVs. In the event that the server install fails to install/modify the files. Refer to the Microsoft CRM Integration hints and tips.doc on the User CD for more details of changing these files manually.

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## .NET Framework

The Microsoft .NET Framework requires installation on each client computer.

1. Goto <http://windowsupdate.microsoft.com>
2. Click Pick updates to install
3. Once complete select your OS version
4. Find Microsoft .NET framework version 1.1 in the list (scroll down it required) and press Add
5. Click Review and install updates
6. Press the Install Now button.
7. Follow the on screen commands.

This procedure will now include any other updates that the Windows update system thinks your computer requires.

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## Client Integration & TAPI Installation

If you have **not** previously installed TAPI, refer to the following instructions. The IP Office Microsoft CRM Client Integration software and the TAPI software are available from the IP Office User CD. We recommend that these applications are installed at the same time.

1. Insert the IP Office User CD into the CD Drive.
2. Select the IP Office Unit.
3. Select the User Name & Password of the User you want to associate with the IP Office Microsoft CRM Client Integration application. Click **Next**.
4. Select the IP Office Microsoft CRM Client Integration application and the TAPI. Click **Next**. Follow the on screen prompts.
5. At the completed installation screen click **Finish** to complete the installation.
6. We recommend you Reboot your PC after loading these applications.

The Application is now installed to the following path on the Start Menu.

**Start/Programs/IP Office/MS CRM Integration**

If you have previously installed TAPI, refer to the following instructions.

1. Insert the IP Office User CD into the CD Drive.
2. Select the IP Office Unit.
3. Select the User Name & Password of the User you want to associate with the IP Office Microsoft CRM Client Integration application. Click **Next**.
4. Click **Finish**.
5. Select **Modify**.
6. The components selected have already been installed. Do not deselect the selected components.
7. Select the IP Office Microsoft CRM Client Integration application. Click **Next**. Follow the on screen prompts.
8. At the completed installation screen click **Finish** to complete the installation.
9. We recommend you Reboot your PC after loading these applications.

# IP Office Microsoft CRM Integration Options

You can alter a limited number of options with IP Office Microsoft CRM Integration software.



1. Right click the icon in the status area.
2. The following items are displayed, **About**, **Configure** and **Exit**.
3. Select **Configure**.
4. Change the options required and click **OK**

## Telephony Settings

**Unknown Caller Action** – Specifies the action performed by Screen Popping an unknown caller. The following options are available;

- Do Nothing
- Display a Warning Message
- Pop New Account Screen
- Pop New Contact Screen

**External Access No:** The prefix required to access an external line.

## MSCRM Server Details

**MSCRM Server:** The Name of the Microsoft CRM Server you are connecting to.

A screenshot of the 'Avaya MSCRM Screen Pop Configuration' dialog box. The dialog has a blue title bar with the Avaya logo and a close button. It contains three sections: 'TAPI Settings' with fields for 'Username' (marie carr) and 'Switch IP Address' (192.168.42.1); 'Telephony Settings' with a dropdown for 'Unknown Caller Action' (Pop New Contact Screen) and a text field for 'External Access No' (9); and 'MSCRM Server Details' with a text field for 'MSCRM Server' (win2kad). At the bottom are 'OK' and 'Cancel' buttons.

**Avaya MSCRM Screen Pop Configuration**

TAPI Settings

TAPI in Single User mode.

Username: marie carr

Switch IP Address: 192.168.42.1

Telephony Settings

Unknown Caller Action: Pop New Contact Screen

External Access No: 9

MSCRM Server Details

MSCRM Server: win2kad

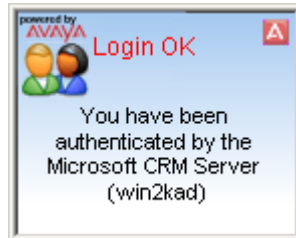
OK Cancel

# Launching Microsoft CRM Integration Software


Follow the steps to start the IP Office Microsoft CRM software .

- Click the **Start** button on the Windows Taskbar.
- Point to **Programs**
- Point to **IP Office**
- Click **MS CRM Integration**.

The following message is display when login is successful. **You have been authenticated by the Microsoft CRM Server (name)**






When the application is running the  icon is displayed in the status area.

When the application is not running the  icon is displayed in the status area.

## Contact Out Dialing

To use the Out Dialing capability of the IP Office Microsoft CRM application, select the individual you want to call. You can call by phone number details.



1. Select the person you want to call.
2. Select the contact's number you want to call.
3. Press the Dial button , ,  from the Contact's Toolbar.
4. The phone call is being actioned.





## Account Out Dialing

To use the Out Dialing capability of the IP Office Microsoft CRM application, select the account you want to call. You can call by phone number details.

1. Select the Account you want to call.
2. Select the Account's phone number you want to call.
3. Press the Dial button , , from the Account Toolbar.
4. The phone call is being actioned.



## Screen Popping

The IP Office Microsoft CRM Integration software allows the incoming call details to be screen popped to the desktop of your PC.



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