# Table of Contents

Installing MS-CRM .............................................................................................................. 5  
MS-CRM Introduction ............................................................................................................. 5  
Installation .............................................................................................................................. 6  
System Requirements ............................................................................................................ 6  
   Licences ............................................................................................................................... 6  
Hardware Requirements ......................................................................................................... 6  
Server Integration .................................................................................................................. 7  
.NET Framework ..................................................................................................................... 7  
Client Integration & TAPI Installation .................................................................................... 8  

Using MS-CRM ................................................................................................................... 9  
Launching Microsoft CRM Integration Software ................................................................. 9  
IP Office Microsoft CRM Integration Options ...................................................................... 10  
Screen Popping ..................................................................................................................... 11  
Account Out Dialing ............................................................................................................. 11  
Contact Out Dialing ............................................................................................................. 12  

Index..................................................................................................................................... 13
Installing MS-CRM

MS-CRM 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 (MS-CRM) to show caller information, using screen popping.

IP Office Microsoft CRM Integration also enables calls to be made from the MS-CRM contact and account forms.
Installation
The IP Office Microsoft CRM Integration software requires several applications installed on the Client & Server PC.

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

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

<table>
<thead>
<tr>
<th>Application</th>
<th>Software Version</th>
<th>Server/Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft CRM Server (Professional)</td>
<td>1.0</td>
<td>Server</td>
</tr>
<tr>
<td>IP Office Core</td>
<td>1.4 +</td>
<td>Telephone System</td>
</tr>
<tr>
<td>TAPI</td>
<td>1.0.0.16</td>
<td>Client</td>
</tr>
<tr>
<td>Microsoft .Net Framework</td>
<td>1.1</td>
<td>Client</td>
</tr>
<tr>
<td>IP Office Microsoft CRM Integration Client</td>
<td>1.4</td>
<td>Client</td>
</tr>
<tr>
<td>Internet Explorer</td>
<td>6.0 +</td>
<td>Client</td>
</tr>
</tbody>
</table>

Licences

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

- **Processor**: Pentium 3.
- **Clock Speed**: 500MHz.
- **Memory**: 128 MB.
Server Integration
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.

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.
8. 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.

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

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.
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.
Using MS-CRM

Launching Microsoft CRM Integration Software
Follow the steps to start the IP Office Microsoft CRM software.

1. Click the **Start** button on the Windows Taskbar.
2. Point to **Programs**.
3. Point to **IP Office**.
4. Click **MS CRM Integration**.
5. The following message is displayed when login is successful. **You have been authenticated by the Microsoft CRM Server (name).**

- ![Icon](image) This icon appears in the status bar when the application is running.
- ![Icon](image) This icon appears in the status bar when the application is open but not running.
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.

![Avaya MSCRM Screen Pop Configuration]

4. Change the options as 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 to which you are connected.
Screen Popping
The IP Office Microsoft CRM Integration software allows the incoming call details to be screen popped to the desktop of your PC.

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.
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.
Software Version 6
Start
  IP Office
  Microsoft CRM 9
Start 9
Start button
  Windows Taskbar
  9
Start button 9
Start Menu 8
Start/Programs/IP
Office/MS CRM
Integration 8
System
Requirements 6

T
TAPI 6, 8
TAPI Installation 8
Telephone System 6
Telephony Settings
  10
Tips.doc
  User CD 7
Tips.doc 7

U
Unknown Caller
Action 10
Use
  Out Dialing 11, 12
Use 11, 12
User
  Password 8
User 8
User CD
  tips.doc 7
User CD 7
User Name
  Select 8
User Name 7, 8

W
Warning Message
Display 10
Warning Message 10
Web.config file 7

Y
Yes 7
Performance figures and data quoted in this document are typical, and must be specifically confirmed in writing by Avaya before they become applicable to any particular order or contract.

The company reserves the right to make alterations or amendments to the detailed specifications at its discretion. The publication of information in this document does not imply freedom from patent or other protective rights of Avaya or others.

Intellectual property related to this product (including trademarks) and registered to Lucent Technologies have been transferred or licensed to Avaya.

All trademarks identified by the ® or ™ are registered trademarks or trademarks, respectively, of Avaya Inc. All other trademarks are the property of their respective owners.

This document contains proprietary information of Avaya and is not to be disclosed or used except in accordance with applicable agreements.

Any comments or suggestions regarding this document should be sent to “wgctechpubs@avaya.com”.

© 2005 Avaya Inc. All rights reserved.

Avaya
Sterling Court
15 - 21 Mundells
Welwyn Garden City
Hertfordshire
AL7 1LZ
England

Tel: +44 (0) 1707 392200
Fax: +44 (0) 1707 376933
Web: http://www.avaya.com