

# Phone Manager Application Support - Microsoft Dynamics CRM

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DOCUMENT RELEASE 5.0

APPLICATION SUPPORT



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# Microsoft Dynamics CRM

## Overview

This describes the features that are available when integrating with Microsoft Dynamics CRM.

## Supported Versions

The following Microsoft Dynamics CRM versions are supported.

Version	On-premise deployment	Internet-facing deployment (IFD)	Microsoft Online
v5 (2011)			
v6 (2013)			
v7 (2015)			
v8 (2016)			

## Features

Integration with Microsoft Dynamics CRM supports the features listed below:

- [Screen pop for contacts](#)
- [Automatic call history entry](#)
- [Calendar & DND synchronization](#)

### Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.

The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes the user name 'Isa Sastre Mitel' and a profile icon. The main content area displays the contact record for 'Luka Pape', with the owner listed as 'Isa Sastre'. The 'Summary' section contains the following contact information:

CONTACT INFORMATION	
Full Name*	Luka Pape
Job Title	--
Company Name	MITEL
Email	--
Business Phone	2225554444
Mobile Phone	7774441111
Fax	--
Preferred Method of	Any
Address	--

The contact status is 'Active'. To the right, a call log window shows a call to the mobile number 7774441111 with a duration of 00:02. A 'Clear call' button is visible at the bottom right of the call log.


If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 2225554444 and this has found three matching *Contact* entities that have this telephone number. This also will then show the any related entities, in this example the *Account* the contact is associated with.

The screenshot shows a 'Multiple Contacts Found' dialog box with the following results:

- Contact: Pippa Crane (Account: BUSINESS CONTACT)
- Contact: Alberto Puga (Account: BUSINESS CONTACT)
- Contact: Aurora Rojas (Account: BUSINESS CONTACT)

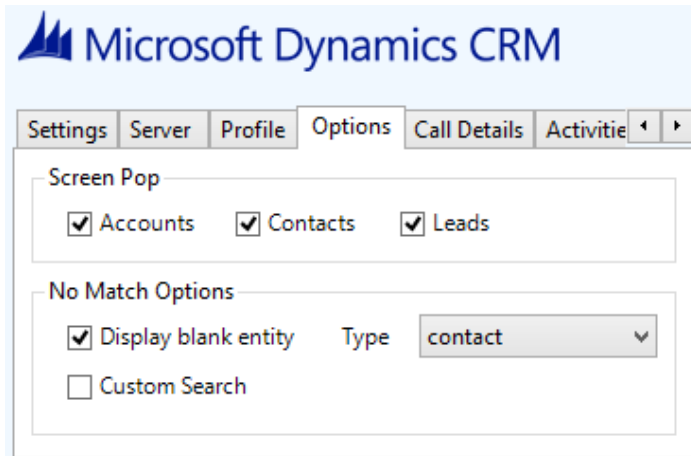
A 'Display' button is located at the bottom right of the dialog. To the right, a call log window shows a call to the business phone number 2225554444 with a duration of 00:01. A 'Clear call' button is visible at the bottom right of the call log.

The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

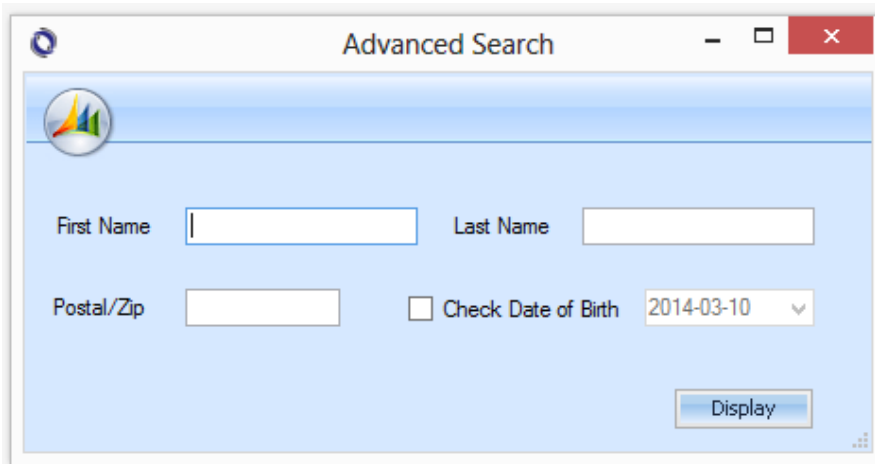
 The plugin will only search for *Accounts* and *Contacts* that are in the *Active* state. If any records have been *Deactivated* then they will not be displayed.

### Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* Entities are searched. These options are set on the *Options* tab



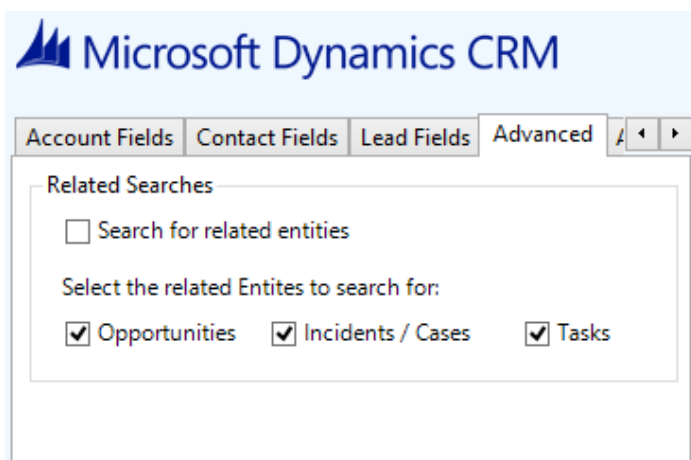
If no match is found then the *Custom Search* option can be selected and this will display a form to allow the user to enter the first name, last name, date of birth or post code and these values will then be used to try and find any matching records.



If still no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

### Advanced options

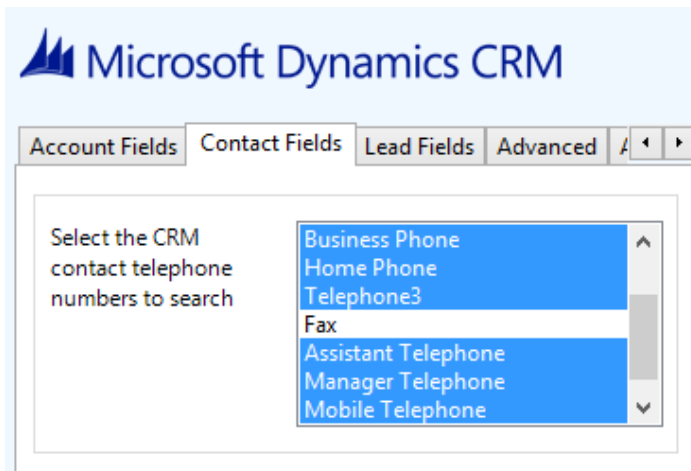
The *Advanced* tab allows control over if related Entities of a matching *Contact*, *Account* or *Lead* are shown in the *Multiple Contacts Found* window.



Any related Entities that have their *statecode* as *Open* (for Opportunities & Tasks) or *Active* (for Incidents/Cases) will then be displayed in the *Multiple Contacts Found* window. Selecting these related matches in the *Multiple Contacts Found* window and clicking *Display* will then pop this record.

### Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* Entities individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.




These are the default field name and descriptions and may be different if they have been customized. Contact your Microsoft Dynamics CRM administrator for details.

#### Contact Entities







Field name	Field description	Enabled?
Business Phone	telephone1	
Home Phone	telephone2	
Telephone3	telephone3	
Fax	fax	
Assistant Telephone	assistantphone	
Manager Telephone	managerphone	
Mobile Telephone	mobilephone	
Pager	pager	
Primary Address Phone 1	address1_telephone1	
Primary Address Phone 2	address1_telephone2	
Primary Address Phone 3	address1_telephone3	

#### Account Entities

Field name	Field description	Enabled?
Main Phone	telephone1	
Other Phone	telephone2	

Fax	fax	
-----	-----	---

**Lead Entities**

Field name	Field description	Enabled?
Business Phone	telephone1	
Home Phone	telephone2	
Other Phone	telephone3	
Fax	fax	
Mobile Phone	mobilephone	
Pager	pager	

**Telephone number formats**

Microsoft Dynamics CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

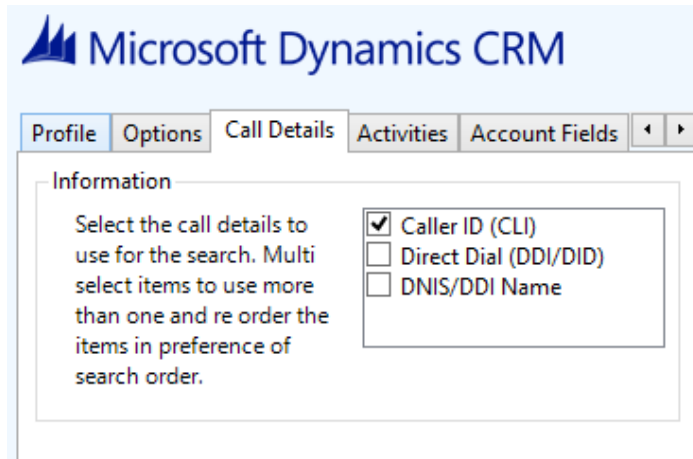
UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234


The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

**Call details**

The call information that is used to search for matching records can be configured. By default the dialed number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.



 Caller ID represents either the caller ID for inbound calls or the dialed number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

### Automatic call history entry

The plugin supports the ability to be able to automatically create and display a Microsoft Dynamics CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialed, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the [screen popping](#). The telephone numbers used to search are set in the [screen popping](#) section.

The Activity record is automatically created with the information relating to the call entered into the description field and the related entities are linked as shown.



PHONE CALL ▾

## Outbound Answered

**Priority**  
Normal

**Due**  
7/23/2014 11:11 AM

**Status\***  
Open

**Owner\***  
[Sergio Araya](#)

**Subject\***  
Outbound Answered

**Call From\***  
[Sergio Araya](#)

**Call To\***  
[Sergio Araya](#)

**Phone Number**  
+44 1291 430000

**Direction**  
Outgoing

**Description**

**Phone number:** +44 1291 430000  
**DDI:**  
**DDI Name:**  
**Direction:** Outbound  
**Account Code:**  
**Trunk:** 94308  
**Transferring Extension:**

**Call Recording:** <http://callrecorder/default.aspx?recid=1574601>

<b>Phone number</b>	For inbound calls this is the caller ID and for outbound calls this is the dialed number.
<b>DDI/DID</b>	For external inbound calls only, the DDI/DID number that the call came in on.
<b>DDI/DID Name</b>	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
<b>Direction</b>	The direction of the call.
<b>Account Code</b>	The account codes that was set on the call.
<b>Trunk</b>	For external calls the outside network trunk number that the call was made or received.
<b>Transferring Extension</b>	The device that the call was transferred from.
<b>Duration</b>	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
<b>Call Recording</b>	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser) The call event trigger must have been set to at least Call Answered as the call recorder only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.

Microsoft Dynamics CRM

Server Profile Options Call Details Activities Account

Call Activity Record

Complete Activity Record

Display Activity Record

**Complete Activity Record:** This will set the status of the Activity to be Completed.

**Display Activity Record:** This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

### Calendar & DND synchronization

The calendar within Microsoft Dynamics CRM can be synchronized with the DND status of the extension of the User. For example when there is an appointment in the calendar and this is due to start the extension can be automatically placed into extensionDND with the DND text set to the *Subject* field of the appointment. When the appointment ends, the extension will be automatically removed from DND.

There are several options to be able to control the types of Activities that cause the extension to go into DND. The *Priorities* tab allows Activities with a specific priority to be included or excluded.

Microsoft Dynamics CRM

Lead Fields Advanced Activities States Priorities

Activity Priorities

Select the CRM activity priorities to include.

- Low
- Normal
- High

The States tab allows only Activities with specific states to be included or excluded.

Microsoft Dynamics CRM

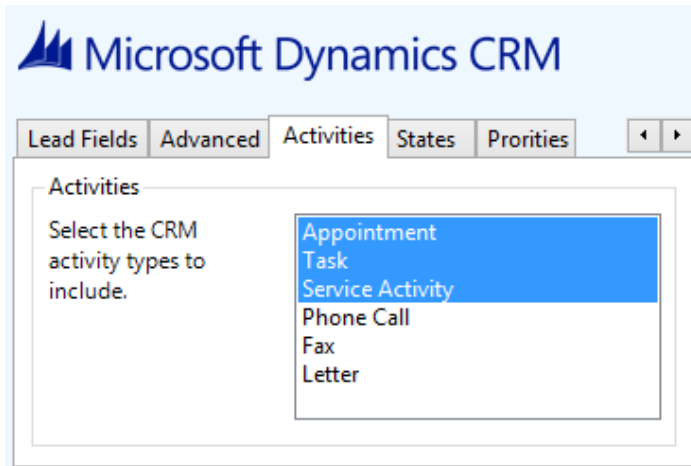
Lead Fields Advanced Activities States Priorities

Activity States

Select the CRM activity states to include.

- Busy
- Out of Office
- Free
- Tentative

The Activities tab allows specific types of Activities to be included or excluded.

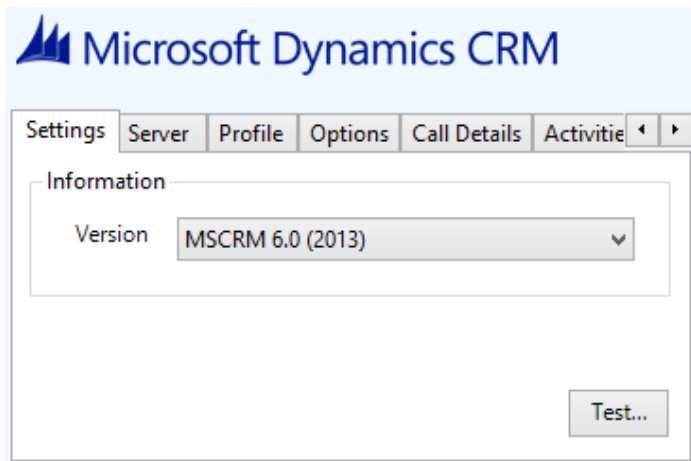


## Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Dynamics CRM.

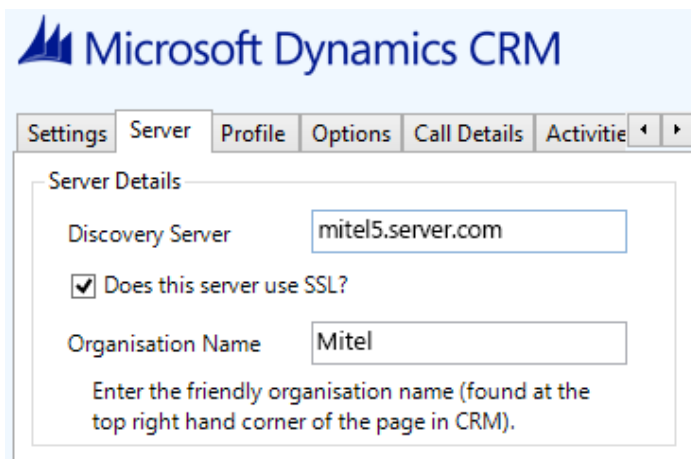
### Settings and versions

The correct version of Dynamics CRM that is used needs to be selected from the Version drop down on the *Settings* tab.



### Server connection

The specific connection details to the CRM server need to be set on the *Server* tab.



**Discovery Server:** This is the URL of the Microsoft Dynamics CRM discovery server. This is normally the same as the CRM server. Contact your administrator for details on what this should be.

For the Microsoft hosted version use the following based upon the organization location.

Location	Discovery Server
North America	crm.dynamics.com
North America 2	crm9.dynamics.com
Europe, Middle East and Africa (EMEA)	crm4.dynamics.com
Asia Pacific Area (APAC)	crm5.dynamics.com
Oceania	crm6.dynamics.com
Japan (JPN)	crm7.dynamics.com
South America	crm2.dynamics.com

**Does this server use SSL:** If SSL/HTTPS connection is required to connect to the CRM system enable this option.


**Organization Name:** This should be set to the organization name configured for the company that will be used to integrate with. This should match the exact name shown in the top right hand corner of the CRM web page when you are logged in.



## Authentication and profile details

The Profile tab enables the security credentials used to access Microsoft Dynamics CRM to be configured.

**Use Integrated Windows Authentication:** If this is set then the username, password and domain details from user who is logged on the computer will be used.

 Using Integrated Windows Authentication is NOT supported when using IFD and claims based authentication.

Depending on the configuration of Microsoft Dynamics CRM and how it is accessed will determine what options are required.