Phone Manager
Application Support

OCTOBER 2014

DOCUMENT RELEASE 4.1

MICROSOFT DYNAMICS CRM

Mitel

Mitel Phone Manager
Release 4.1 - October, 2014

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)	✔	✔	✔

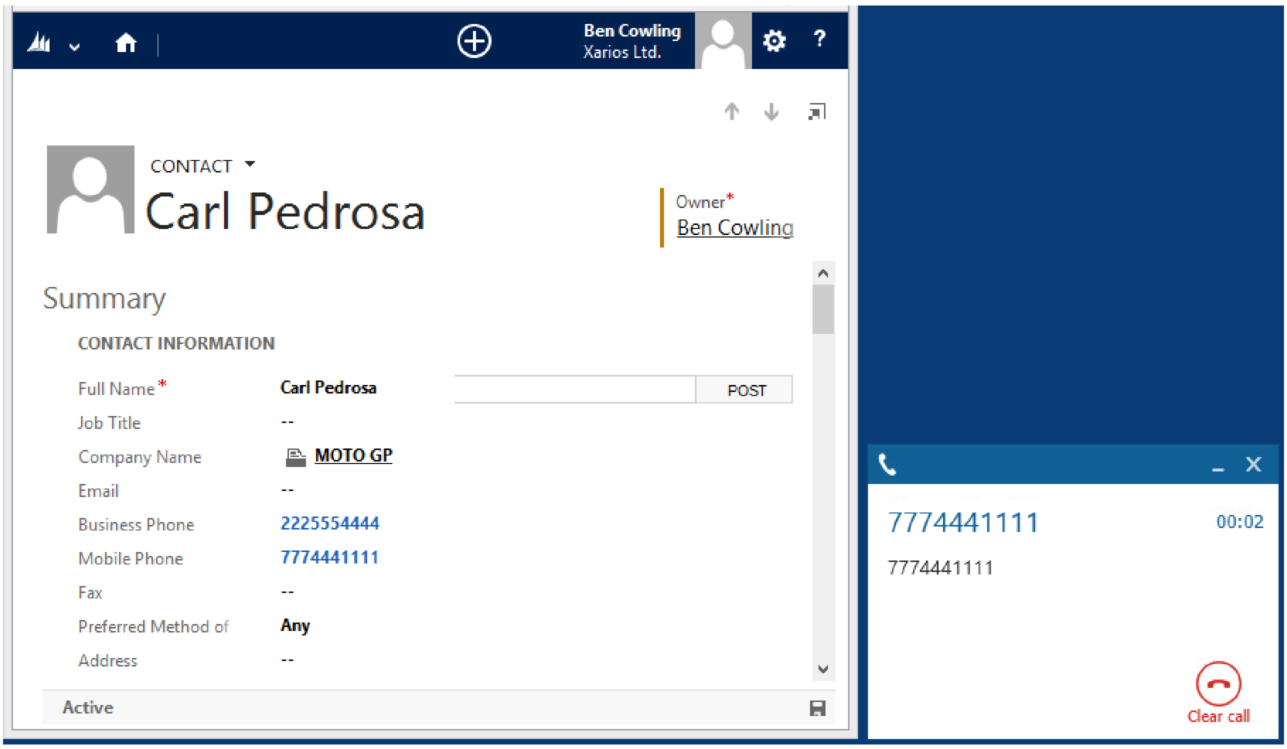
Features

Integration with Microsoft Dynamics CRM supports the features listed below:

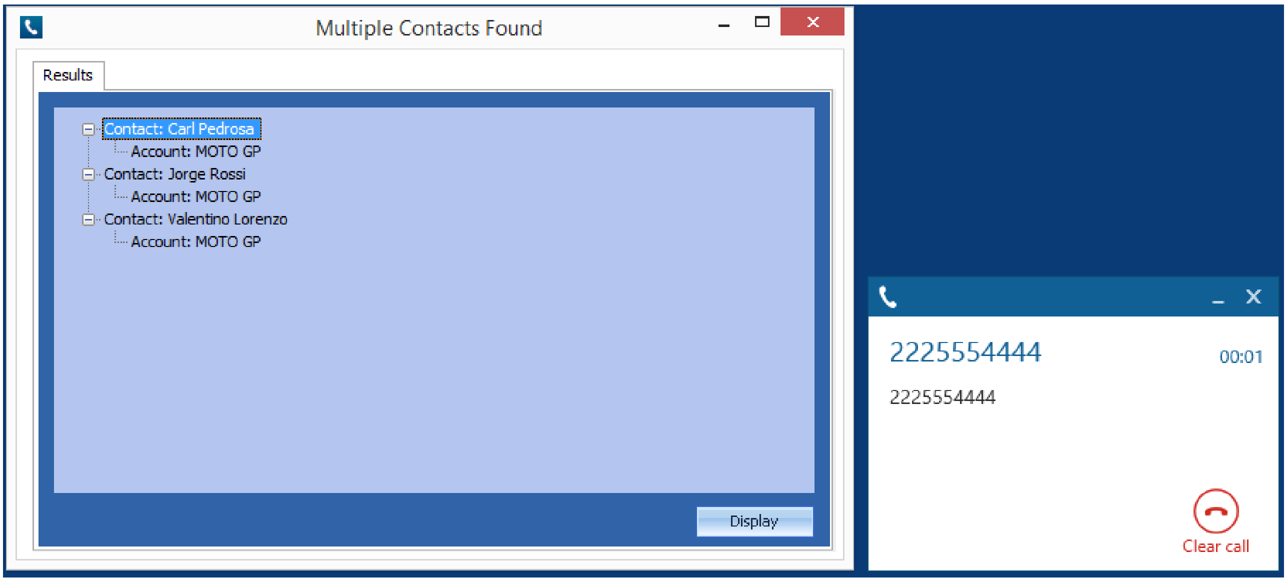
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

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 dialled 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.



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 222555444 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.

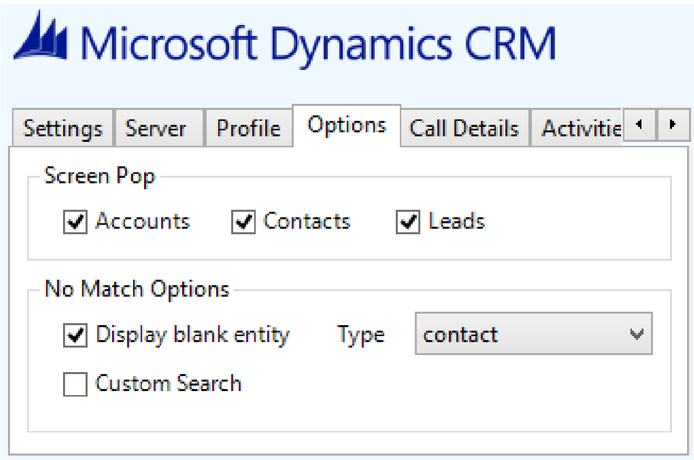


The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

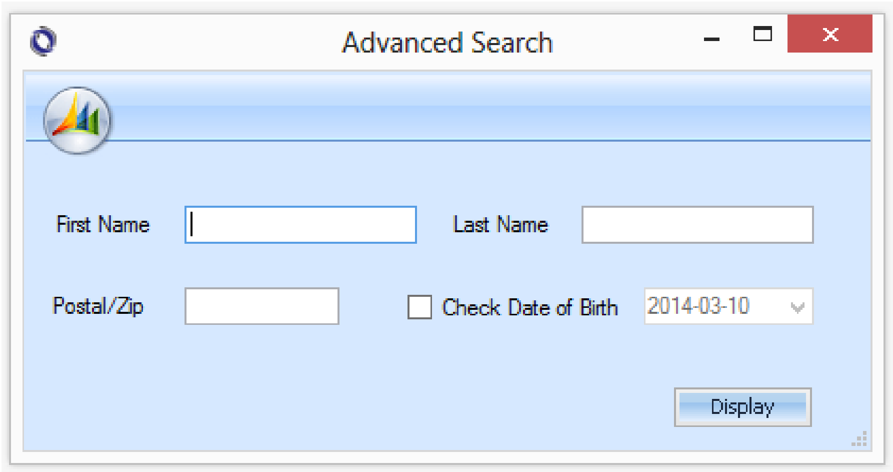
> The plugin will only search for *Accounts* and *Contacts* that are in the *Active* state. If any records have been *Deactivated* then they will not be displayed.

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



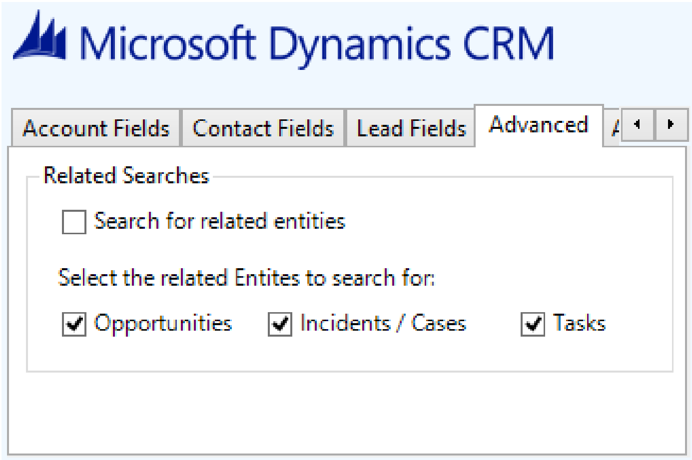
If no match is found then the *Custom Search* option can be selected and this will display a form to allow the user to enter the first name, last name, date of birth or post code and these values will then be used to try and find any matching records.



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

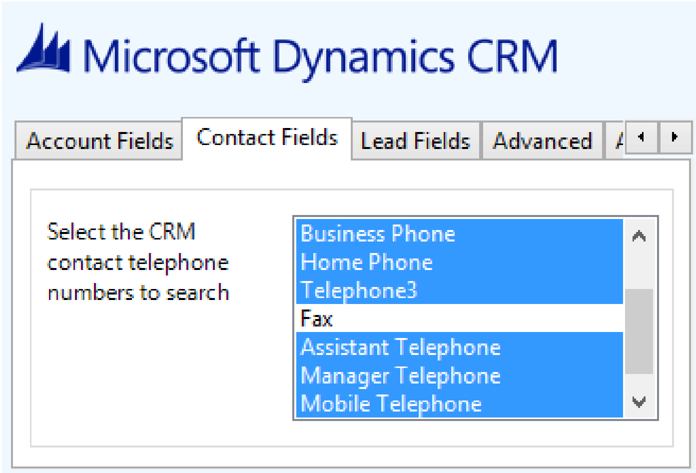
The *Advanced* tab allows control over if related Entities of a matching *Contact*, *Account* or *Lead* are shown in the *Multiple Contacts Found* window.



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 customised. 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.

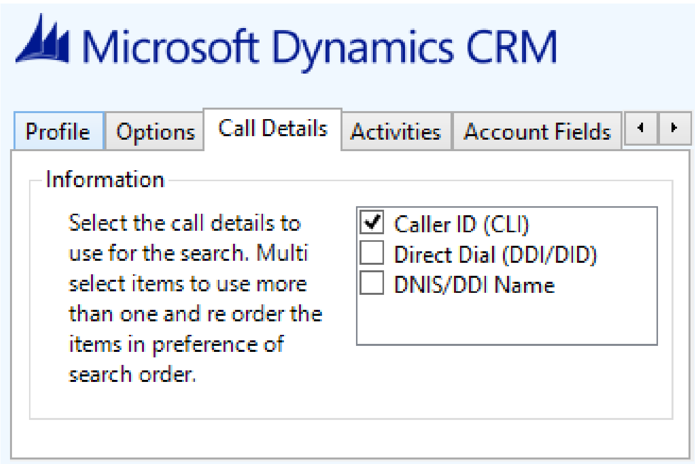
UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

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 dialled 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 dialled number for outbound calls.

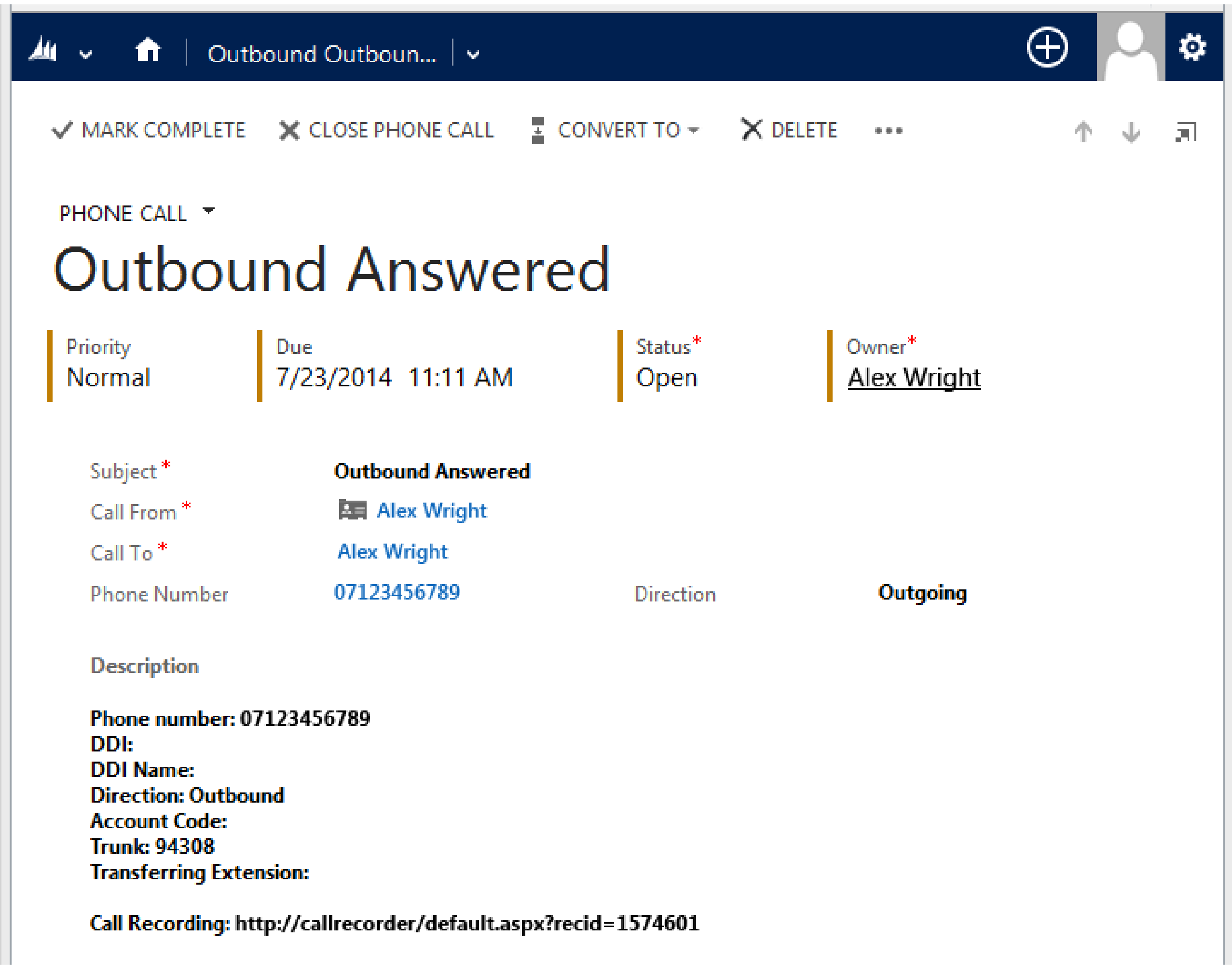
The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

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

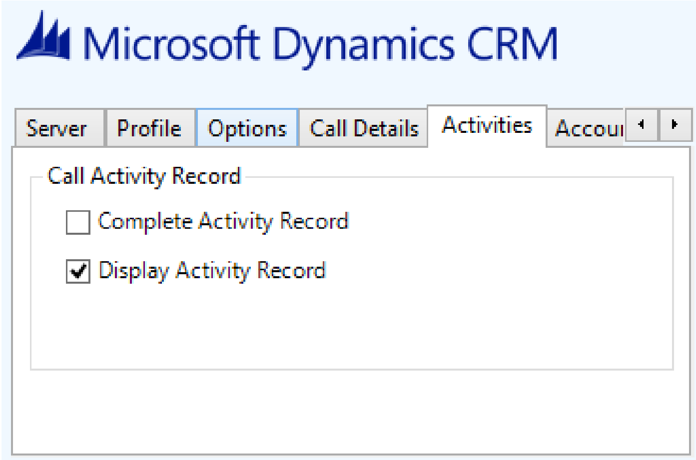
The plugin supports the ability to be able to automatically create and display a Microsoft Dynamics CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window 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 number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or received
Transferring Extension	The device that the call was transferred from.
Duration	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.
Call Recording	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 recorde 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.



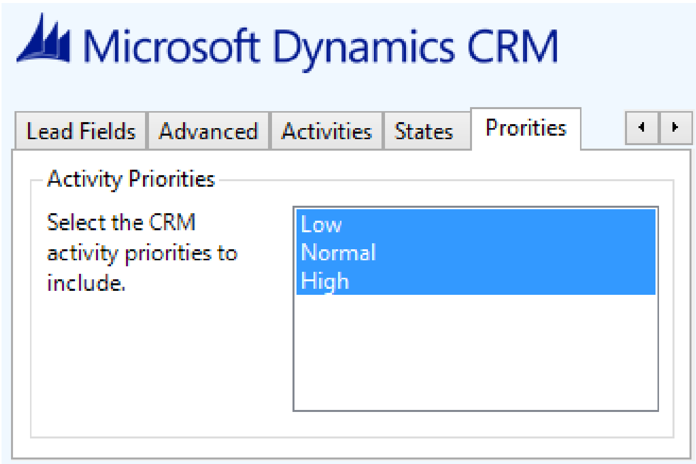
Complete Activity Record: This will set the status of the Activity to be Completed.

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.

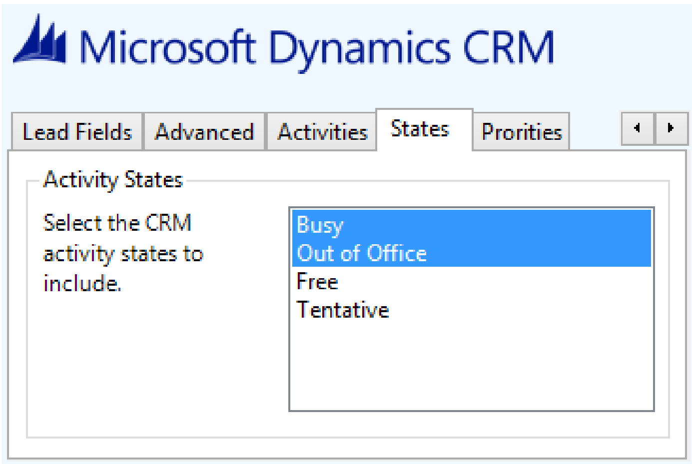
Calendar & DND synchronisation

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

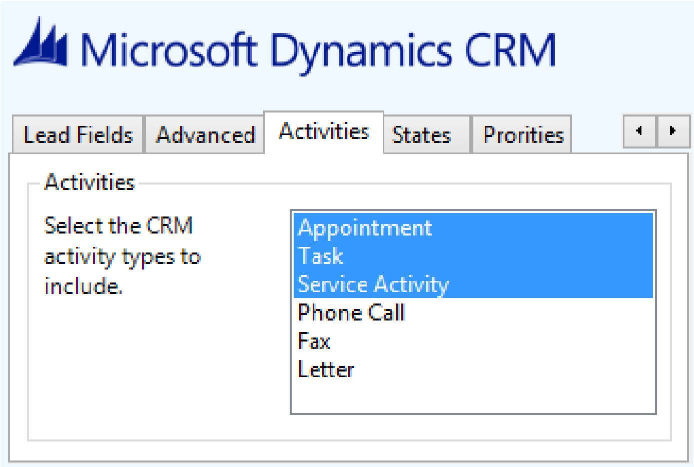
There are several options to be able to control the types of Activities that cause the endpoint to go into DND. The *Priorities* tab allows Activities with a specific priority to be included or excluded.



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



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

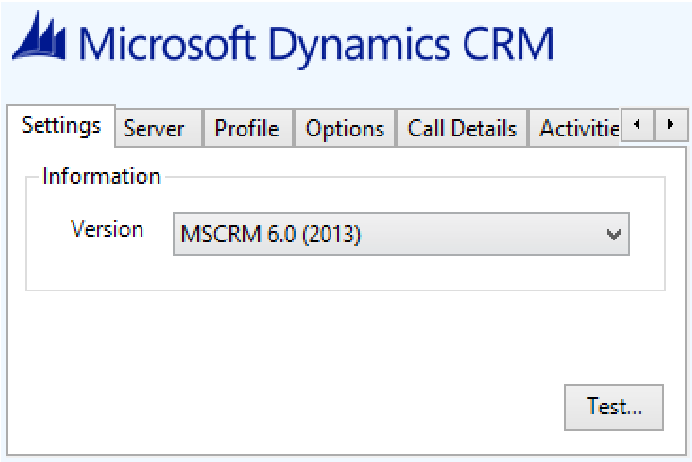


Configuration

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.

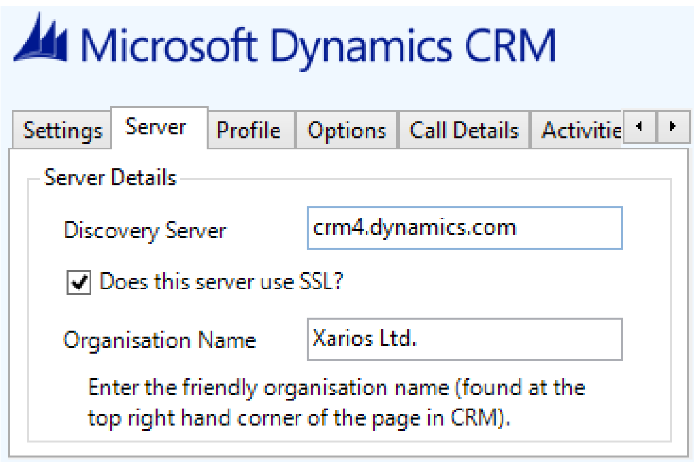
Settings and versions

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.



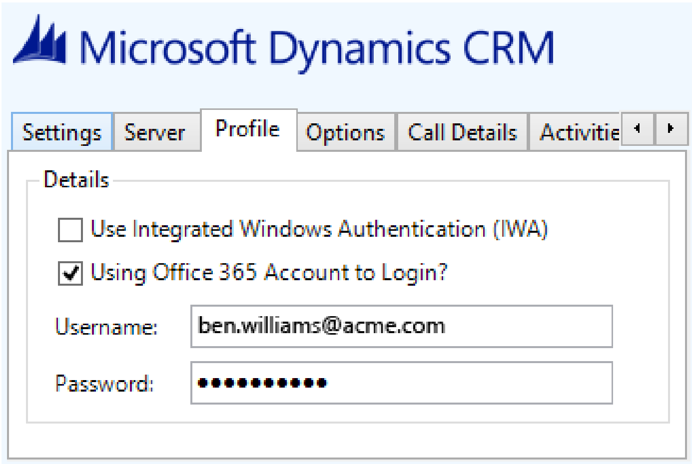
Discovery Server: This is the URL of the Microsoft Dynamics CRM discovery server. This is normally the same as the CRM server. Contact your administrator for details on what this should be. Leave this as crm4.dynamics.com for the Microsoft hosted version.

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

Organisation Name: This should be set to the organisation 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.