



## **c360 CTI Installation Guide - Server**

Microsoft Dynamics CRM 3.0 compatible

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## Overview and Notes

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### Overview

This document outlines the process for installing c360 CTI for Microsoft Dynamics CRM 3.0.

### Microsoft CRM Compatibility

C360 CTI for Microsoft Dynamics CRM 3.0 is compatible with Microsoft Dynamics CRM version 3.0. For additional product information, please visit

<http://www.c360.com/CTI.aspx>

# Installation Instructions

Before installing CTI, please read this document and follow the steps carefully.

The installation of c360 CTI for Microsoft CRM 3.0 requires the setup files which can be downloaded by visiting <http://www.c360.com/DownloadRegister.aspx>.

The installation consists of the following steps:

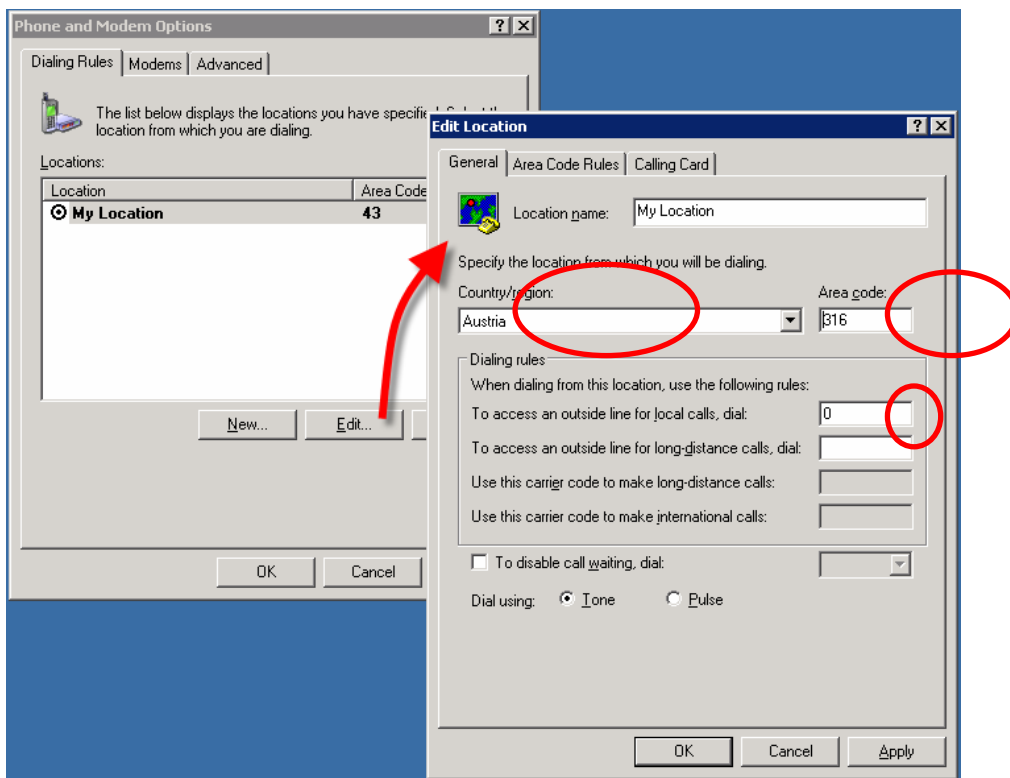
Follow each of the following steps, to complete the installation:

1. Remove all old Installations ("TI TAPI Callout" and "TI for MS CRM 3")
2. Installing CTI for MS CRM 3
3. Configuring the Client

## Verify Phone and modem options

You will find this under <Control Panel> <Phone and Modem Options>

Select your Location and press [Edit...]



## **Local Loop Number**

In most Telephone-Systems you have to enter a Local Loop Number to get a line. If this is the case, you will have to enter this number here.

## **Remove this Country-Code and Area-Code**

This is a special case. Telephone-Systems don't like it when you try to call in your own Country with your own Country-Code. That means if you are in Austria (Country-Code is 0043), you cannot call someone in Austria with 0043 at the beginning. This is also necessary for the Area-Code.

Example for Austria:

You stored the telephone number with e.g. +43 316 680 880 in CRM. CallInfo4CRM replaces the + to 00.

New Number to call: 0043316680880.

If you live outside Austria it will work now, but in Austria it won't.

So TAPI CallOut removes this Country-Code and replaces it with an 0.

Correct Working Number: 0316680880

If your Area-Code is 0316 (or 316) it also will be removed.

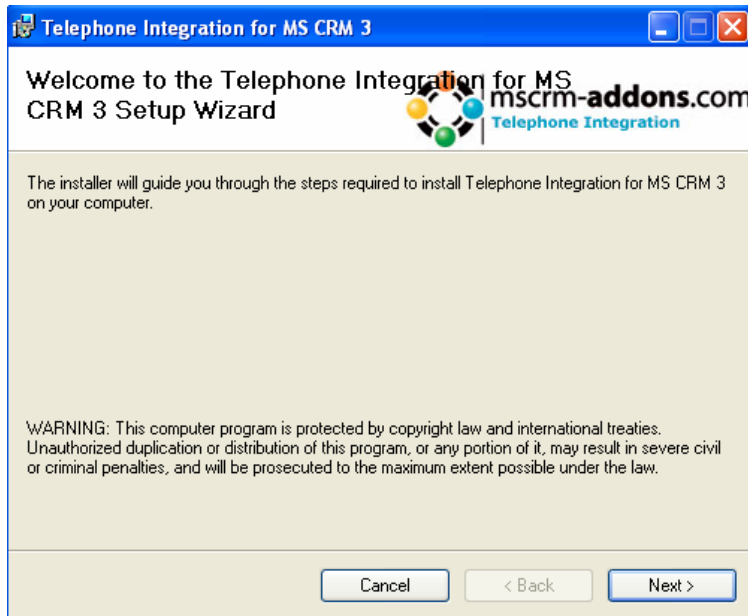
Correct Working Number: 680880

If you set an Local Loop Number (e.g. 0) TAPI CallOut will send 00316680880 (or 0680880) to your Phone.

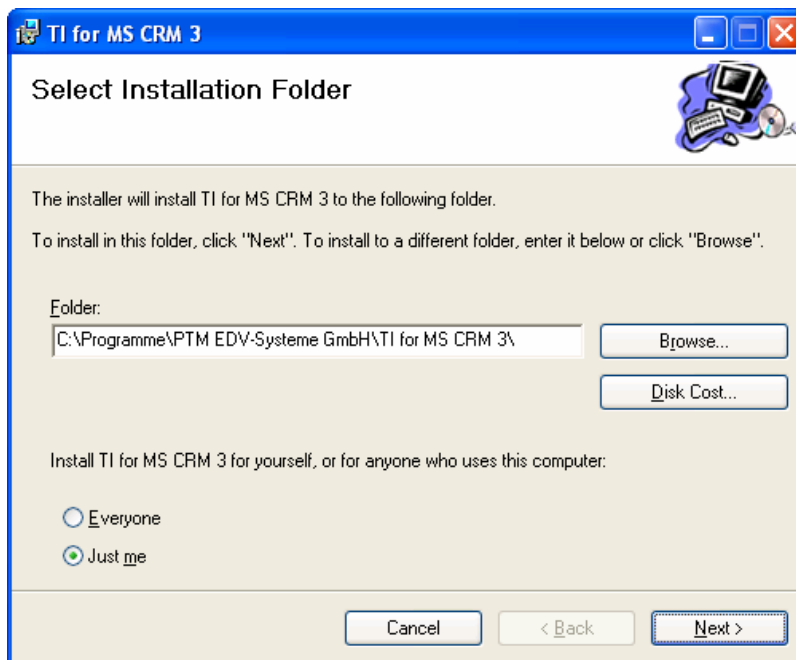
# CTI Client Setup

## Step by Step Instruction

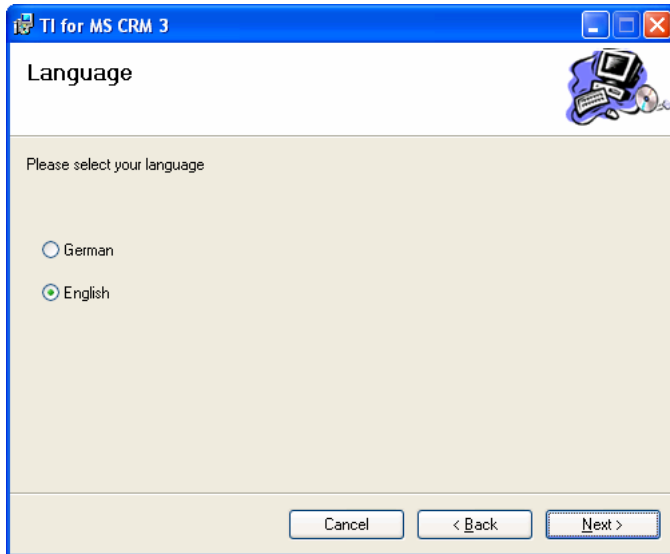
1. Double Click the "Telephone Integration Client Setup.exe" file



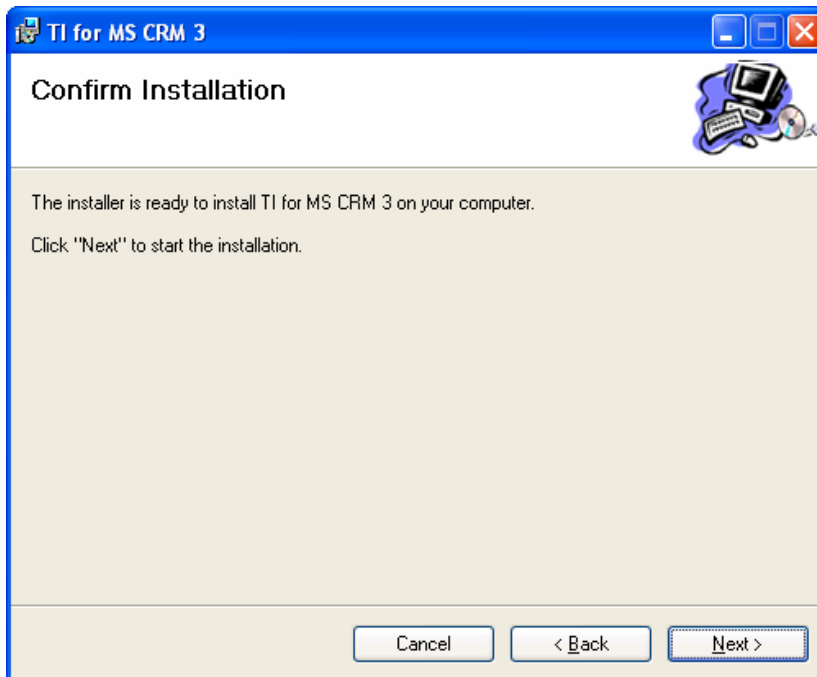
2. You have to select the folder where you want to install CallInfo4CRM. If you agree with this pre settings select <Next>.



### 3. Select Language

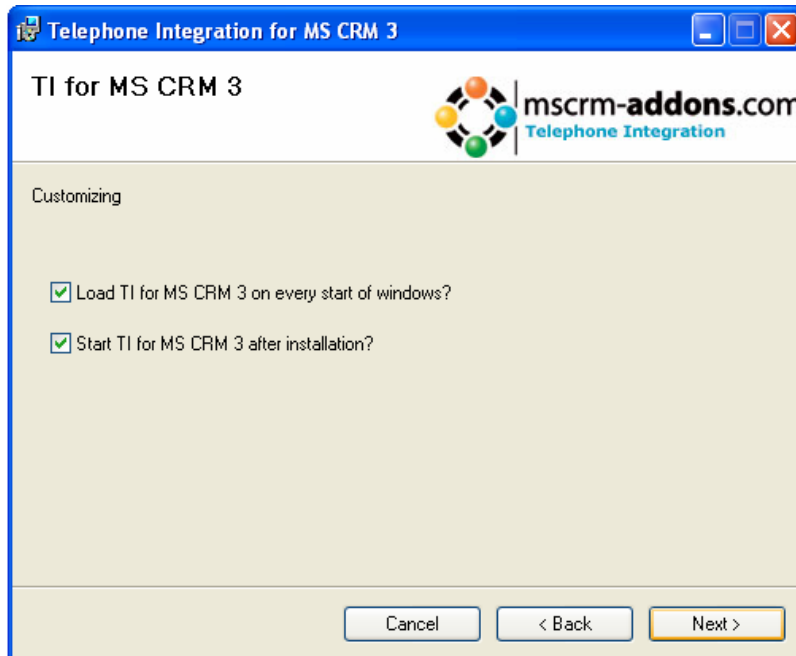


### 4. Confirm Installation



After Click on the Next Button the Installation begins.

### 5. Start TI for MS CRM 3 after installation? / AutoLoad TI on Windows start?

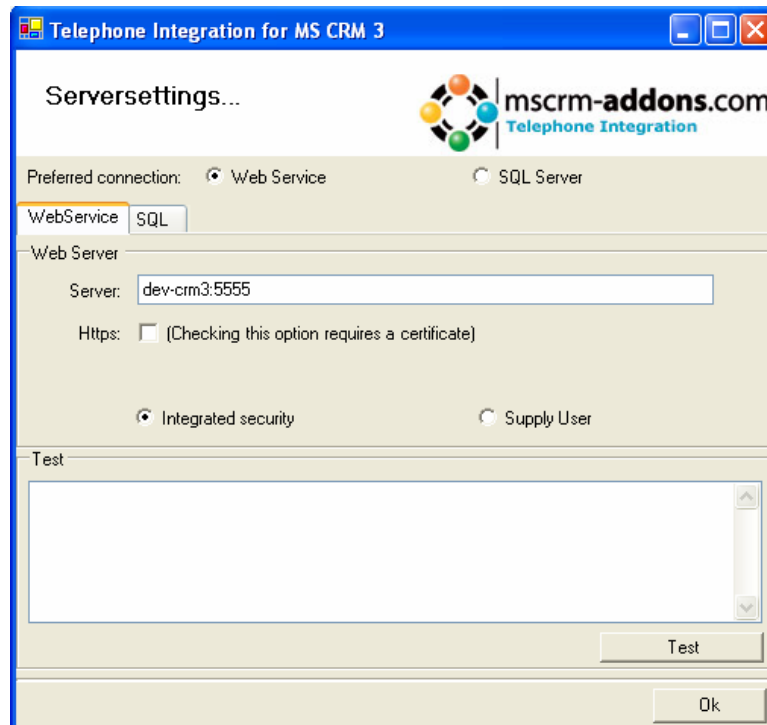


Check it if you want to start it after this installation.../autostart TI with every start of Windows

## 6. Server Settings

Here you have to define the settings for the webservices and SQL-server connection. **IMPORTANT:** you have to define both, WebService-settings and SQL-server settings.

### 6.1. Web Service



**Server:** the name of your MSCRM-Server witch you use in your Internet Explorer, without the http://.

**IMPORTANT:** if the port is not standard http-port(80) you have to mention the portnumber as well.

e.g. in our example the servername is *dev-crm3* and CRM-port is *5555*

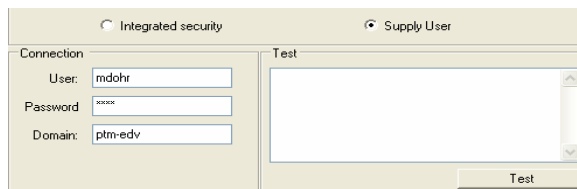
**HTTPS:** check this box to use https, as you see, a certificate is required.

you can test the connection with a click on "Test".

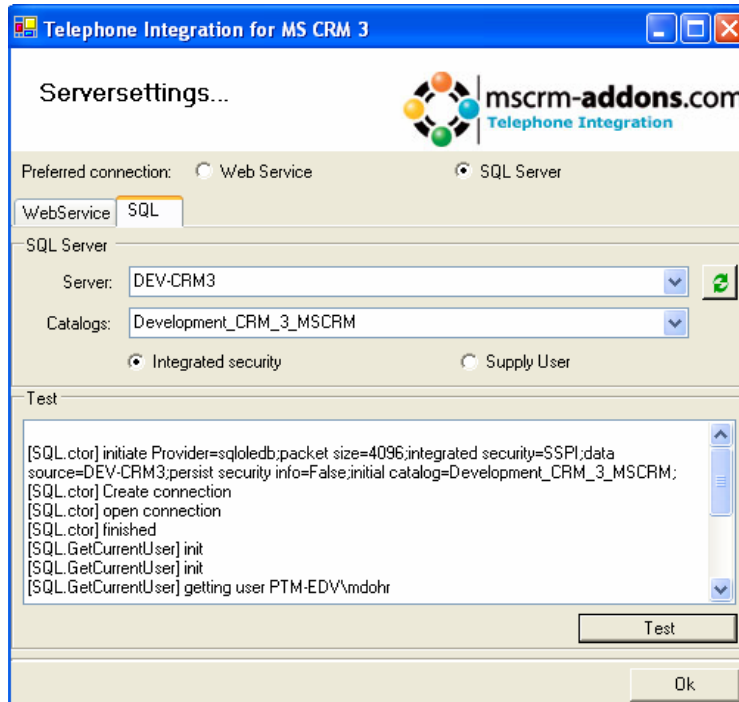
**IMPORTANT:** The user has to be an existing CRM user.

**Integrated security:** Check this radiobutton to logon with your local credentials.

**Supply User:** Check if you want to supply a specific user. In this case you'll have to enter username, password and domain of the user.



## 6.2 SQL Server



Telephone Integration for MS CRM 3

Serversettings... mscrm-addons.com Telephone Integration

Preferred connection:  Web Service  SQL Server

WebService SQL

SQL Server

Server: DEV-CRM3

Catalogs: Development\_CRM\_3\_MSCRM

Integrated security  Supply User

Test

```
[SQL.ctor] initiate Provider=sqloledb;packet size=4096;integrated security=SSPI;data source=DEV-CRM3;persist security info=False;initial catalog=Development_CRM_3_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
```

Test

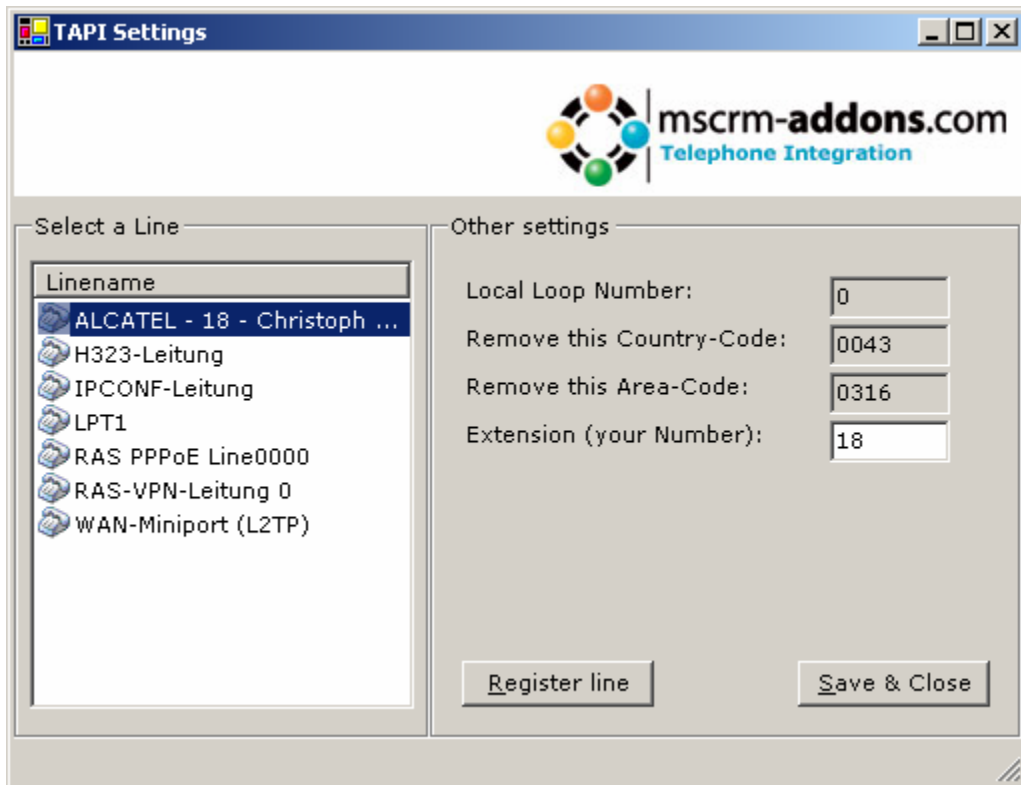
Ok

**Server:** choose the SQL server where the MSCRM – Database is running.

**Catalogs:** choose the MSCRM-catalogue. E.g Development\_CRM\_3\_MSCRM.

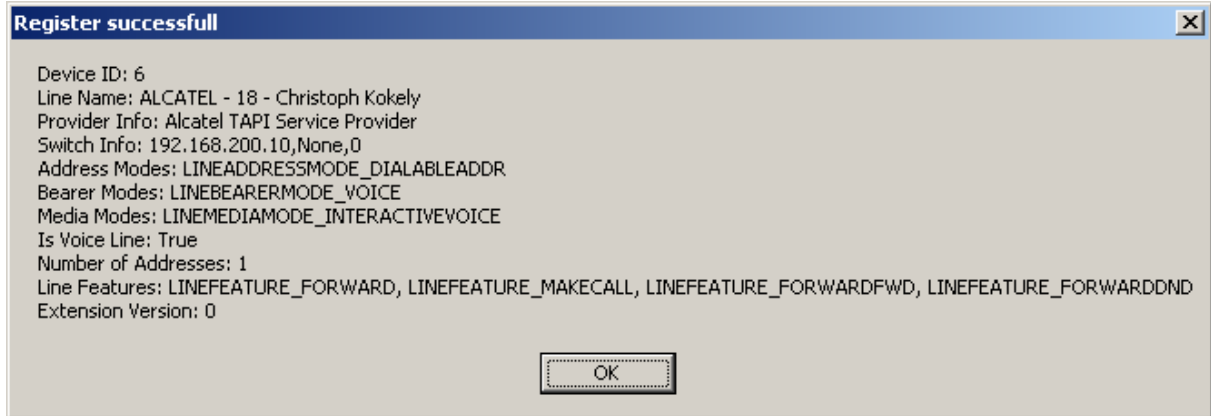
Again you've got the possibility to logon with your local credentials (Integrated security) or to supply a specific user. (see 6.1)

## 7. Basic TAPI Setup



Select the line you want to use and enter the extension number in the field "Extension (your Number)".

Now hit register line to check, if the line can be registered. On success a window like the following will pop up.

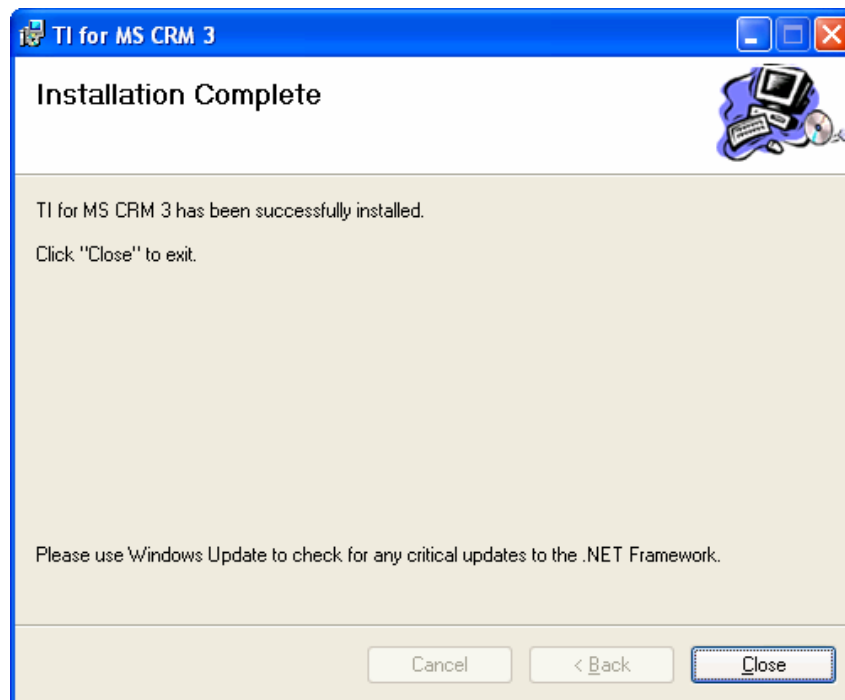


Close the "Register successful" window and hit "Save & Close" to continue.

- Set up TI for MS CRM 3

To do further customizations see the users guide for TI for MS CRM 3

- After the installation ended you have to click on the "close" button



If you selected "Start TI for MS CRM 3 after installation" now TI for MS CRM 3 starts.

### Starting the Client

After successful Installation you should find a new Menu-entry

*Telephone Integration for MS CRM 3 - TI for MS CRM 3*

Click on it and TI for MS CRM 3 starts.

You will only see a little Icon in the right of the Menu-Bar.

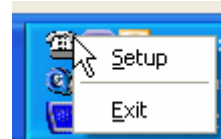


After a few seconds the red cross appears and TI for MS CRM 3 is ready!



### Closing the Client

Click with the right mouse button on the Icon and a little menu will appear – click on [Exit].



### Configuration of the Clients

After installation you can always change the configuration of CallInfo4CRM.

Click the right mouse button on the Icon and select [Setup] (see 3.2).

To activate new server side settings for CallInfo4CRM please restart CallInfo4CRM.