



c360 CTI User Guide

Microsoft Dynamics CRM 3.0 compatible

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c360 CTI

Overview

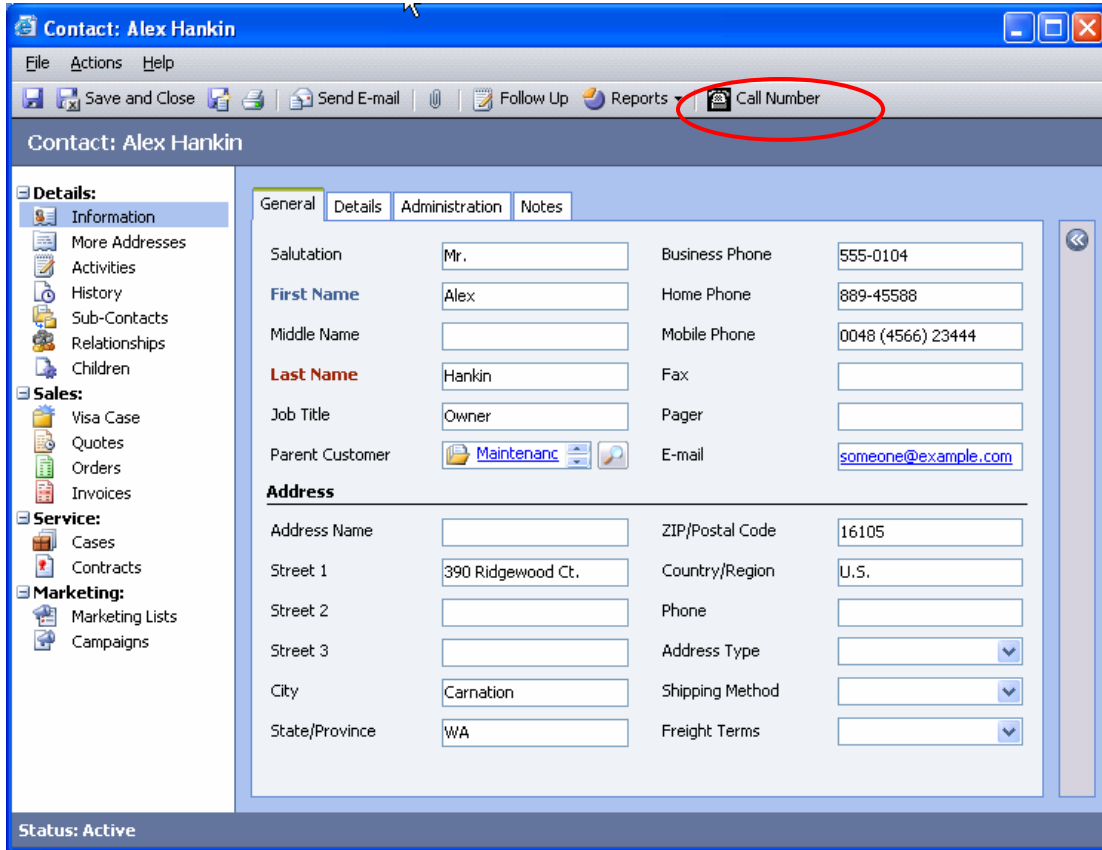
Telephone Integration for Microsoft CRM 3.0 (**TI**) is a CRM Add On which enables you to connect your Telephone System (CTI) to Microsoft CRM 3.0. It works in both directions (incoming and outgoing) and is easy to handle.

On Incoming calls it shows you the name (if it is findable in CRM) and on lifting the handset the contact/account opens. Also an incoming phone activity will be created.

If you want to call someone the Telephone Integration system dials the number for you and also creates an outgoing phone activity.

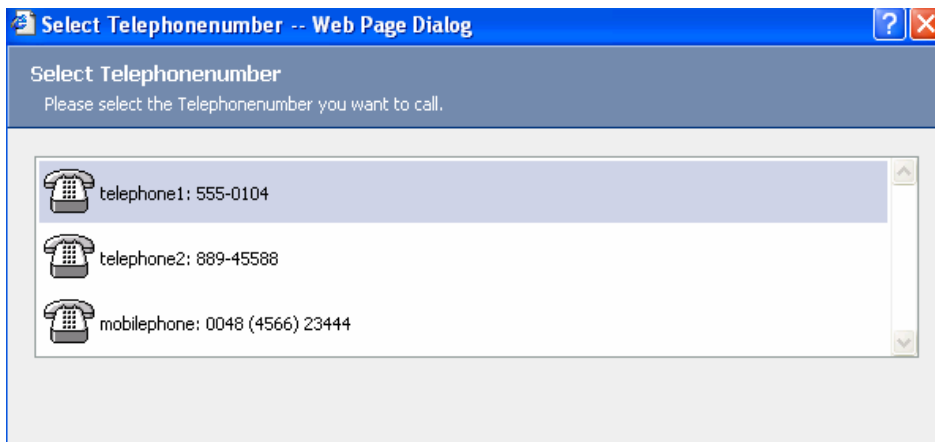
Outgoing Calls

Go to your Account or Contact and open it.



Then just click on [Call Number]

The new Web Page Dialog with all available numbers opens.



Now select the Number you want to call and then press [OK] or activate the call by Double-Click. During your phone is now creating the call the activity will be open.

If the Telephone Integration is started, the outbound call will be noticed and displayed.

The screenshot shows a web browser window titled "Phone Call: New - Microsoft Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a form for creating a new phone call. The form has two tabs: "Phone Call" (selected) and "Notes". The form fields are as follows:

Sender	<input type="text" value="Gail Erickson"/>	Phone Number	<input type="text" value="067684629070"/>
Recipient	<input type="text" value="Alex Hankin"/>	Direction	<input type="radio"/> Incoming <input checked="" type="radio"/> Outgoing
Subject	<input type="text"/>		
Regarding	<input type="text" value="Alex Hankin"/>		
Owner	<input type="text" value="Gail Erickson"/>		
Duration	<input type="text" value="30 minutes"/>	Priority	<input type="text" value="Normal"/>
Due	<input type="text"/>		
Category	<input type="text"/>	Sub-Category	<input type="text"/>

At the bottom of the form, it says "Status: New".

Incoming Call

If TI is started, you can see a little telephone Icon in the Context-Menu.



Balloon Element

The balloon is the central Element on the client side.


This balloon displays all available call Information (see → Call Details).

The 5 Sections identified in the image to the right are




- (1) Call Area
- (2) Balloon functions
- (3) TAPI functions
- (4) CRM functions
- (5) Call function

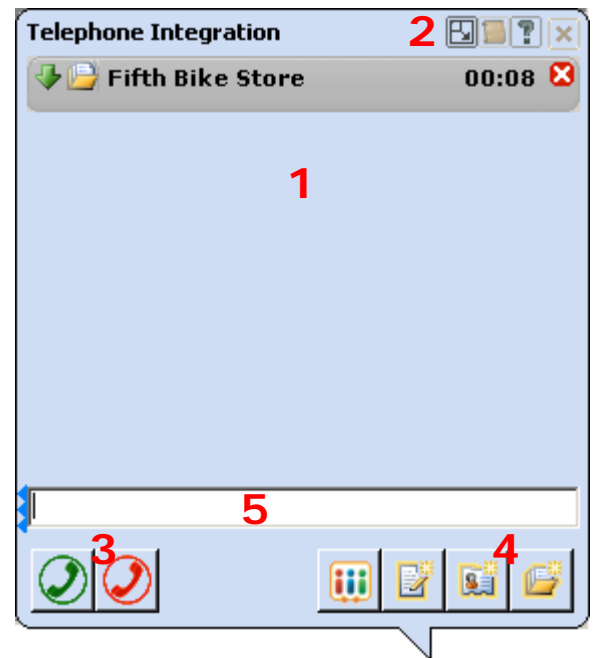
1.) The "Call Area" is described in → Call Details.

2.) The Balloon functions are:

 Enable custom sizing

On clicking this icon, the window layout slightly changes, offering the ability to resize as desired. On hitting this icon again, the feature is disabled again and the selected size is stored. The balloon will stay this size further on (to change by parameters see → Setup).

-  Show History
-  Show Help
-  Hide Balloon window



3.) The TAPI functions are:



Pick up Receiver / Accept Call



Disconnect

4.) CRM functions:



This button opens the CRM entity assigned to the phonecall.

If no entity is specified due to multiple targets (See → Call Details), this opens the entity-selection dialog.



Creates a new activity for the entity assigned to the call.



Create new contact based on the phone number



Create new account based on the phone number

5.) Call function

Enter a telephone number into this area and press the TAPI Function “Pick up receiver”. This will initiate a call with the given number. Selecting an inbound call places the caller number into the call function field, replacing anything in it.



Clicking on this area hides the call function field. The Icon changes to:

Clicking on this area shows the call function field.

Call Details

The call area contains the single call-elements either received or initiated by TelephoneIntegration for CRM 3.0.

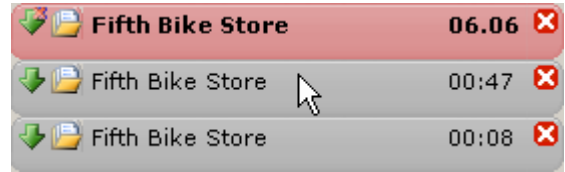
The basic call item has 2 Icons on the left side, indicating item lookup-state and call state, an information area showing begin and end-date for the call, and as soon as connected, the top right



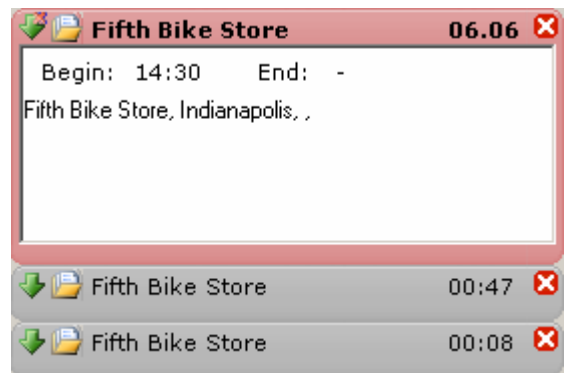
section shows the call duration. The detail area shows the selected display fields of the CRM entity as defined on the server.

Color coding indicates missed incoming calls.

Example for a missed call. Note the call time is being replaced by the date of the call.



Expanding the call shows the time, when call has happened



Following call state icons are possible:



Outgoing call in Progress, not connected



Incoming call awaiting to be picked up



Call Connected



Finished incoming call



Missed incoming call. The color of the call element also changes on this occasion



Finished outbound call



Finished outbound call, that was not answered



Call has been redirected to you or by you

Following CRM state icons are possible:



CRM Lookup initiated, but not finished



The telephone number search returned more than one entity (See multiple targets)



The CRM lookup has returned an account entity



The CRM lookup has returned a lead entity



The CRM lookup has returned any other entity

Multiple Targets

If the CRM-search for a number returns multiple targets, a detail window is displayed on lifting the handle, showing all possible choices.

If a call with multiple targets has been missed, pressing the “Open in CRM” – button (see → CRM functions) shows the detail selection instead.



The detail window shows all possible entries with an icon according to their entity-type.

By pressing the “to balloon” button the selected entity is assigned to the call. You can also do this by double clicking on the desired entity.

By entering a value into the Filter field, the entities are filtered for this value. The Filter works instantaneously. To remove, just clear the textbox.

As soon as an entity is selected for the call (either by finding only one match in CRM, or by selecting one target from the multiple targets window, some CRM-Windows might be opened, depending on your settings.

To enable this function, "allow unsigned ActiveX" option must be activated inside Internet Explorer.

The screenshot shows a web browser window titled "Phone Call: New - Microsoft Internet Explorer". The browser's address bar and menu bar are visible. The main content area displays a form for creating a new phone call. The form has two tabs: "Phone Call" (selected) and "Notes". The "Phone Call" tab contains the following fields and controls:

- Sender:** Alex Hankin
- Recipient:** Gail Erickson
- Phone Number:** 067684629070
- Direction:** Incoming (selected), Outgoing
- Subject:** (empty text box)
- Regarding:** Alex Hankin
- Owner:** Gail Erickson
- Duration:** 30 minutes (dropdown menu)
- Priority:** Normal (dropdown menu)
- Due:** (empty text box with a calendar icon)
- Category:** (empty text box)
- Sub-Category:** (empty text box)

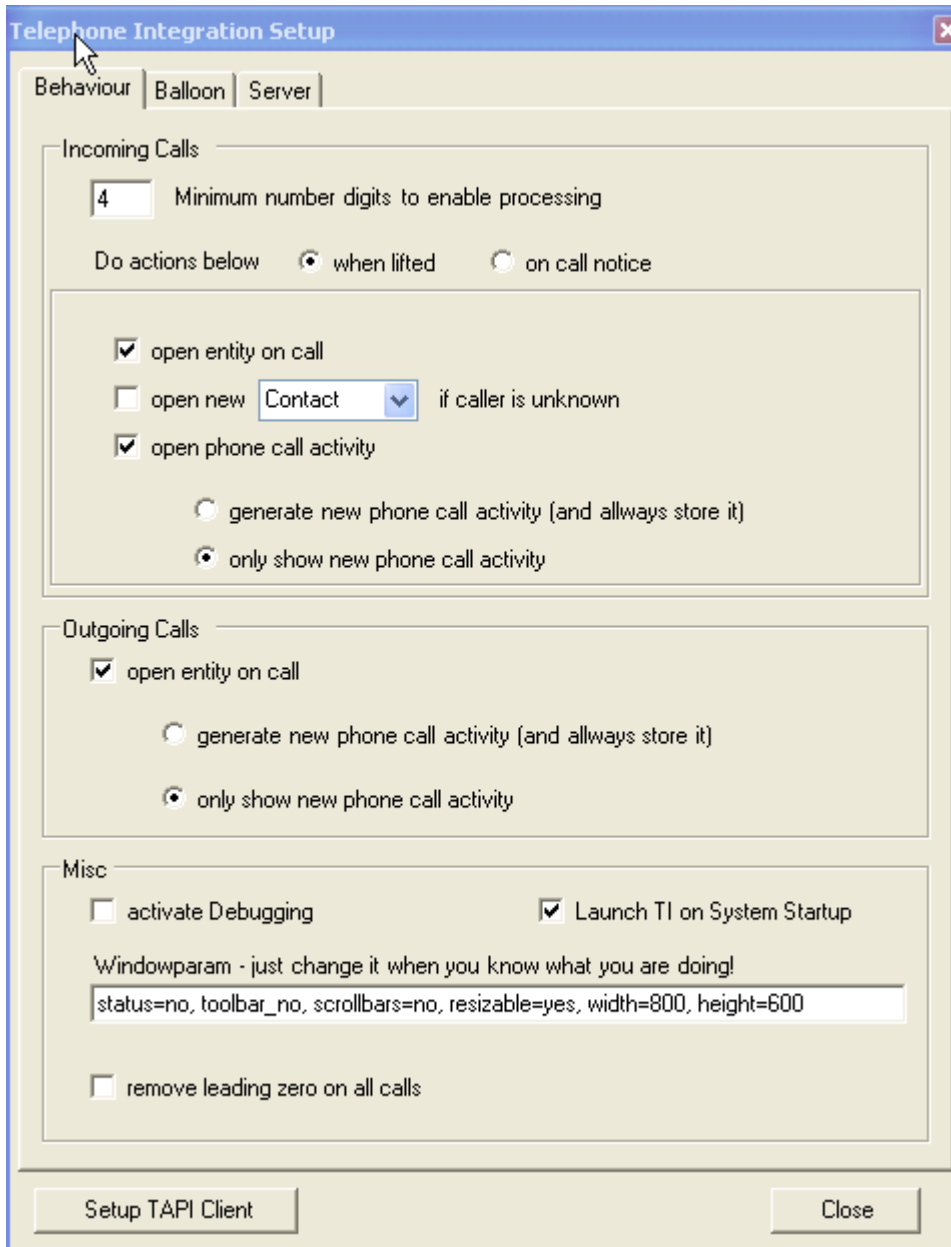
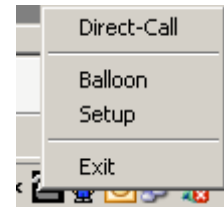
At the bottom of the form, the status is indicated as "Status: New".

Contact/Account might be opened.

To define the desired behaviour see → Configuration (next chapter)

Configuration

To change the configuration start *Telephone Integration Setup*. Click the right mouse button on the Icon in the Context-Menu and select Setup.



INCOMING CALLS:

General:

Minimum number digits to enable processing: Defines the minimum number length, which have to be hit to enable call processing. Calls that have less than the desired amount of digits will not be checked in CRM for caller-information.

When lifting receiver:

open Contact/Account on call: if you are called and you lift the handset **TI** will open the contact/account in CRM (if it was found).

open phone call activity: if you are called and you lift the handset **TI** will create a Phone Call Activity...

- **generate new phone call activity (and always store it):** stores it and opens it for you.
- **only show phone call activity:** generates a new phone call activity without storing

OUTGOING CALLS:

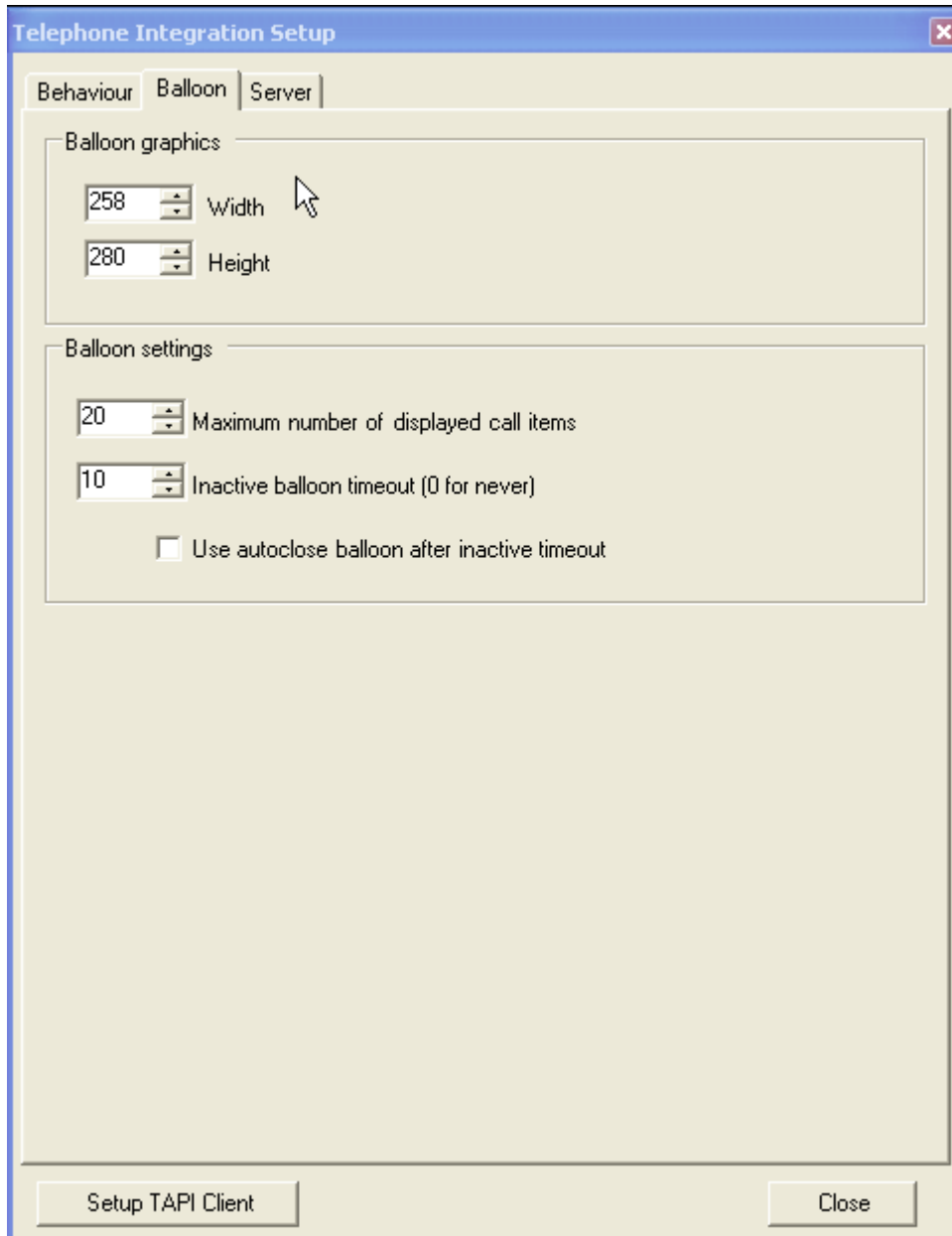
open phone call activity: if you are called and you lift the handset **TI** will create a Phone Call Activity...

- **generate new phone call activity (and always store it):** stores it and opens it for you.
- **only show phone call activity:** generates a new phone call activity without storing

MISC:

- **activate Debugging:** check this to activate debugging
- **WindowParam:** here you can change the settings of the Windows above. You can set the Start-Window-Size, if it is resizable and so on.

Balloon Settings

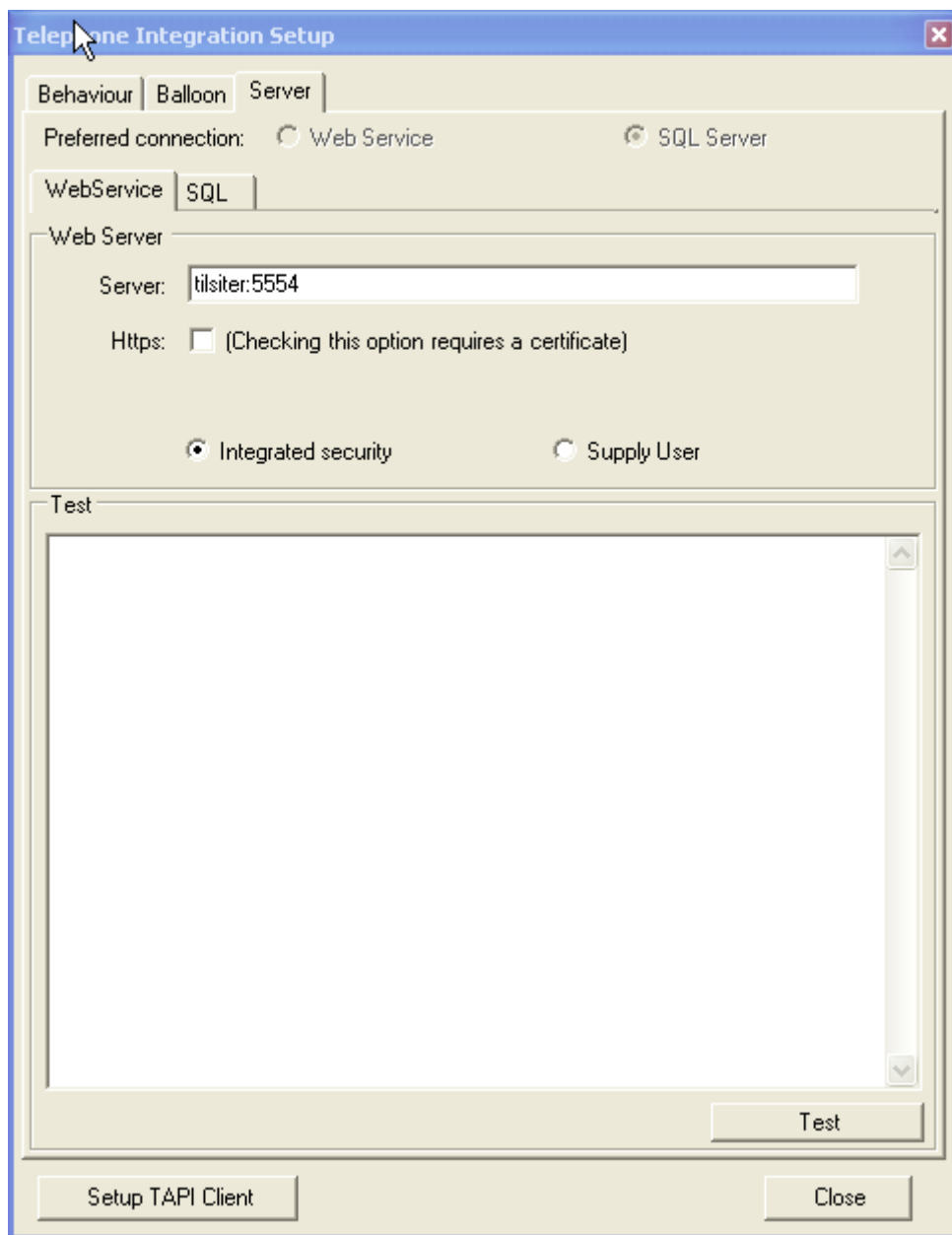


Under “Balloon graphics” the dimensions of the balloon can be altered. An easier way is using the resize function on the balloon window (see → 3.1 Balloon Element).

“Balloon settings” defines the behaviour of the balloon, when displayed.

Inactive balloon timeout defines the timespan, after which the balloon disappears, if no action is taken. Selecting an item or a function on the balloon prevents the timeout to close the balloon.

Server Settings



The screenshot shows the 'Telephone Integration Setup' dialog box with the 'Server' tab selected. The 'Preferred connection' is set to 'SQL Server'. The 'WebService' and 'SQL' sub-tabs are visible, with 'SQL' being the active one. The 'Web Server' section contains a 'Server' text box with the value 'tilsiter:5554', an unchecked 'Https' checkbox, and two radio buttons for 'Integrated security' (selected) and 'Supply User'. A 'Test' button is located at the bottom right of the 'Web Server' section. At the bottom of the dialog are 'Setup TAPI Client' and 'Close' buttons.

Here you have to enter your server name and port: CRM: port!

For example: tilsiter: 5554

Here is an example for the settings on the SQL Server:

