



# IP Office Technical Bulletin

**Bulletin no: 60**

**Date: 10<sup>th</sup> February 2006**

**Title: General Availability (GA) of Avaya Microsoft™  
CRM Integration Solution v3.0**

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## **General Availability (GA) of Avaya Microsoft™ CRM Integration Solution v3.0**

Avaya is pleased to announce the availability of the Avaya Microsoft CRM Integration Solution v3.0, enhanced and updated to support Microsoft Dynamics® CRM 3.0.

### **1 Product Overview**

The Integration Solution v3.0 allows a business to connect MSCRM 3.0 to Avaya IP Office. This is accomplished by integrating incoming calls directly to the desktop of the user through screen pop technology, and by providing outbound dial capability directly from the Microsoft CRM entity.

In addition to its support for MSCRM 3.0, a number of feature and usability enhancements have been added to this release.

The Integration Solution v3.0 is compatible with MSCRM 3.0 and IP Office systems running 3.1 or higher.

### **2 Functionality Enhancements**

The Integration Solution v3.0 has the same capabilities as version 1.2, with some key enhancements based upon customer feedback, as listed below:

#### **2.1 Outbound Call Features**

In addition to the existing support of Account and Contact entries, outbound calls can now be dialled from the following records:

- Leads
- Phone Call Activity

The Account and Contact records now include dial support for all default phone fields.

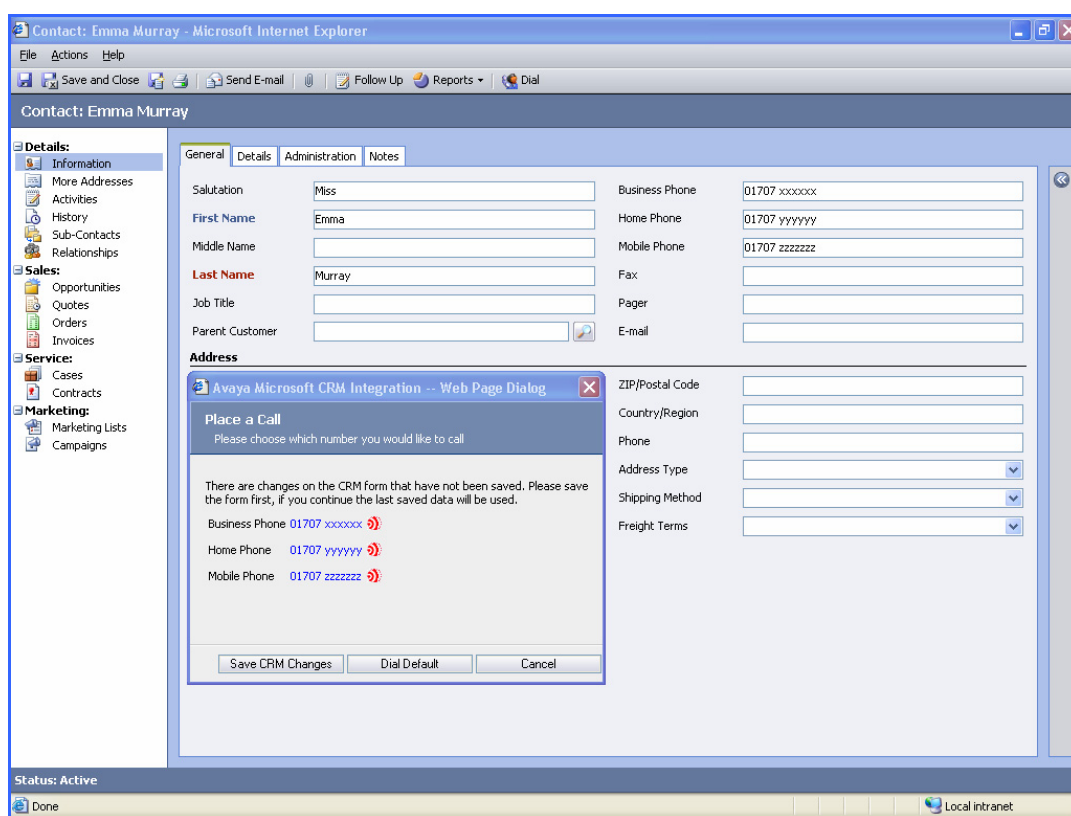
#### **2.2 Inbound Call Features**

In addition to the existing support of Account and Contact entries, inbound calls can also be matched against in the following records:

- Leads
- Phone Call Activity

When resolving inbound calls it is possible to exclude those entries that correspond to the Leads and Phone Call activity records. This is achieved within the Client Application in the system tray.

An “Answer Bar” feature has been added that allows online and or phone representatives to determine how to handle inbound calls when there are multiple contacts and or activities in the database. This feature also allows the user to choose which screen will be “popped” upon an inbound call.



## 2.3 Data Tag Inbound Screen Pop

In addition to the existing Data Tag support of Account and Contact entries, the Case record has been included.

Call presentation with an appropriately formed Case Data Tag will use the supplied data to screen pop a Case based on the supplied “Case Number”, matching the case number field value.

## 2.4 Activity Support

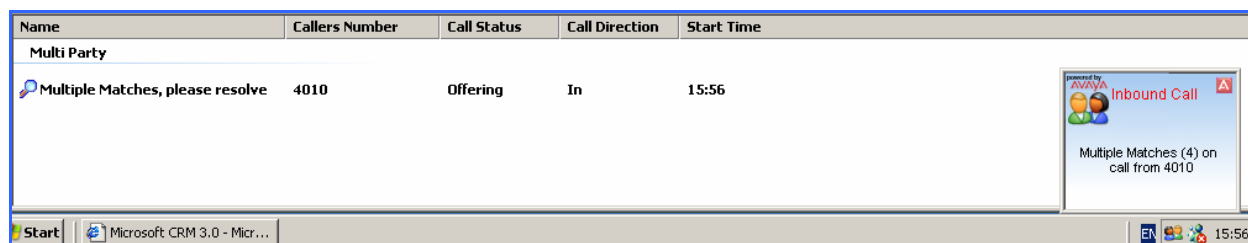
Based on the configuration chosen by the user, the system will create “Phone Call Activity” records based on the following events:

- Inbound call that is resolved to a single supported Microsoft CRM entity, via CLI/ANI or Tag.
- Inbound call, selected as the target in a multi target scenario.
- Outbound call initiated from the application or the supported Microsoft CRM entities.

*Note: Outbound calls made from a handset or other means are not be supported.*

## 2.5 Multi Target Resolution

The resolution of multiple matches will occur when the callers' number is associated with more than one Microsoft CRM record. A new window is displayed requesting the caller to resolve the call, or direct which screen (account, contact, lead, or activity) the incoming call should "pop" to.



## 2.6 Comparative Analysis of New and Existing Features

Feature Description	1.2	3.0
<b>Outbound Call Features</b>		
Outbound call from Account (Business, Other) phone fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Outbound call from Account – all default phone fields.		<input checked="" type="checkbox"/>
Outbound call from Contact ( Main, Home, Mobile)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Outbound call from Contact – all default phone fields.		<input checked="" type="checkbox"/>
Outbound call from Phone Call Activity		<input checked="" type="checkbox"/>
Outbound call from Lead		<input checked="" type="checkbox"/>
<b>Inbound Call Features</b>		
Screen Pop Account on (Business, Other) phone fields.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Screen Pop Contact on (Business, Home, Mobile)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Screen Pop Leads		<input checked="" type="checkbox"/>
Phone Activity Records		<input checked="" type="checkbox"/>
<b>Data Tag Inbound Screen Pop</b>		
Screen Pop Account – using data tag	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Screen Pop Contact – using data tag	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Screen Pop Case – using data tag		<input checked="" type="checkbox"/>
Support for custom Attributes on Account/Contact for matching		<input checked="" type="checkbox"/>
<b>Activity Support</b>		
Phone Call Activity Record Creation		<input checked="" type="checkbox"/>
Phone Call Activity Record Form Population		<input checked="" type="checkbox"/>
<b>Multi Target Resolution</b>		
Support User Guided Multi Resolution selection - Accounts		<input checked="" type="checkbox"/>
Support User Guided Multi Resolution selection - Contacts		<input checked="" type="checkbox"/>
Support User Guided Multi Resolution selection - Leads		<input checked="" type="checkbox"/>

## 3 Technical Notes

### 3.1 Upgrade Procedure

The Integration Solution v3.0 is only compatible with MSCRM v3.0. Any previous versions of the Integration Solution software should be uninstalled prior to the installation of the Integration Solution v3.0 software.

*Please refer to the Avaya Microsoft™ CRM Integration Solution installation manual for install/uninstall instructions:*

<http://www.avaya.com/support>

### 3.2 Server Installation Notes

#### **Overview**

The following instructions provide guidance on installing the necessary Avaya resources and configuration settings manually. Also, to provide clarity on the actions carried out during deployment via the application installation package.

The user should be experienced with the MSCRM 3.0 configuration files and IIS web site configuration/administration before attempting to make any changes. Please backup any files before you start applying changes.

#### **Manual Steps**

1. Create a directory under the MSCRM web site physical location and copy the server side resources from the distribution package.
2. Using Internet Information Services (IIS) Manager, create a virtual directory under the MSCRM web site, the alias should be named "AVCRMRes", the physical location should be an appropriate directory on the system containing the server side resources (AvDial.htm and the image files), created earlier.

Ensure that the "Enable Default Content" option is set and includes "Default.htm", in the Documents Tab of the "AVCRMRes" properties page.

3. Add the button configuration statements to the ISV.Config.xml file (\_Resources).

#### **Dial Button - toolbar button statement to be added to entities**

If there are existing customizations, then the button statement needs to be added. The complete Toolbar statement is shown for context.

```
<ToolBar ValidForCreate="0" ValidForUpdate="1">  
<Button Title="Dial" ToolTip="Dial a numbe1r using Avaya IP Office"  
Icon="/AvCRMRes/Avmos_16_15697.gif" Url="/AvCRMRes/AvDial.htm" PassParams="1"  
WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px" WinMode="1"  
Client="Web"/>  
<ToolBarSpacer/>  
</ToolBar>
```

#### **Sections Supported**

```
<Entity name="account">  
<Entity name="contact">  
<Entity name="lead">
```

### Full Lead Example

```
<Entity name="lead">
  <ToolBar ValidForCreate="0" ValidForUpdate="1">
    <Button Title="Dial" ToolTip="Dial a number using Avaya IP Office"
      Icon="/AvCRMRes/Avmos_16_15697.gif" Url="/AvCRMRes/AvDial.htm"
      PassParams="1"
      WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px"
      WinMode="1" Client="Web"/>
  <ToolBarSpacer/>
</ToolBar>
</Entity>
```

4. Enable the ISV options by adding "Web" in the MSCRM web sites Web.Config (<add key="ISVIntegration" value="Web"/>).

*Note: XML tags are case sensitive so due care should be applied when making changes.*

### 3.3 Client Installation Notes

The default website within IIS utilises port number 80. If during the installation of MSCRM the option to create a new website is selected, it will use port 5555.

The client installation assumes the web server connection to be port 80. If a new MSCRM website has been created then the client will need to be re-configured to authenticate with the server successfully. On the client machine, this can be achieved with the following steps:

1. Navigate to the following directory : Program Files\Avaya\Avaya Microsoft CRM Integration Solution
2. Edit the following file : AvayaMSCRMEx.exe.config  
<setting name="crmpportNumber" serializeAs="String">  
<value>5555</value>
3. Save changes and restart the CRM client application.

## 4 Assistance

### Manuals and CD's

Manuals and CD's can be found on <http://www.avaya.com/support>.

*Note: The software will only be available via internet download from the Avaya IP Office support site.*

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