IP Office

Avaya Microsoft CRM 3.0 Integration Solution Installation & User Guide

Table Of Contents

Avaya Microsoft CRM Integration

Introduction

The Avaya Microsoft™ CRM Integration Solution allows a business to connect Microsoft Dynamics® CRM 3.0 to Avaya IP Office. It integrates contact points in such a way that will transform the way your business interacts with your customers, this is accomplished by integrating incoming calls directly to the desktop of the user through the use of screen pop technology and by providing outbound dial capability directly from the Microsoft CRM entity.

This document is specifically for use with the Avaya Microsoft™ CRM 3.0 Integration Solution.

Installing Avaya Microsoft CRM Integration Solution

Installation

The Avaya Microsoft CRM Integration Solution requires the following applications to be installed on the Server PC prior to installing the Avaya Microsoft CRM Integration Solution.

- Microsoft Dynamics® CRM 3.0

- IIS 5.0 +

The Avaya Microsoft CRM Integration Solution requires the following applications installed on the Client PC. The client machine will be checked at installation for these components and they will be installed if not found.

- Microsoft .NET 2.0

- IP Office TAPI 2.1 Driver (1.0.0.27)

The Avaya Microsoft CRM Integration Solution is supported on the following client operating systems:

- Microsoft Windows 2000™ Professional

- Microsoft Windows XP™ Professional

Refer to the latest IP Office Technical Tips for further details on operating system support.

System Requirements

The following applications are required for the Avaya Microsoft CRM Integration Solution.

Application	Software Version	Component Location
Microsoft Dynamics® CRM Server (Professional or Small Business Edition)	3.0	Server
IIS *	5.0 +	Server
IP Office Core	3.0 +	Telephone System
IP Office TAPI**	2.1 (1.0.0.27)	Client
Microsoft .Net Framework**	2.0	Client
Avaya Microsoft CRM Integration Solution**	3.0	Client
Internet Explorer *	6.0 +	Client

* These are part of the Microsoft CRM Server/Client requirements.

** These are deployed by the Avaya Microsoft CRM Integration Solution.

Licences

- The Microsoft CRM Integration Users Licence is required for Avaya Microsoft CRM Integration Solution. Refer to the IP Office Installation Manual.

Hardware Requirements

We recommend the following minimum PC specification is used for Avaya Microsoft CRM Integration Solution Client application.

- **Processor:** Pentium 4.

- **Clock Speed:** 1.4 GHz.

- **Memory:** 512 MB.

Server Installation

The Server Installation adds the Dial capability to the Account/Contact/Lead and Phone Activity Record screens.

The Avaya Microsoft CRM Integration Solution modifies the isv.config.xml file and the web.config file to provide ISV integration.

The Avaya Microsoft CRM Integration Solution is available on an IP Office CD.

1. Insert the IP Office CD into the CD Drive.
2. If the CD does not autorun. Open **My Computer** and select the CD Drive.
3. Double Click the **Setup.exe** file
4. Click **Next**.
5. Select the folder for installation.
6. Select the **Microsoft CRM Server**. Follow the on screen prompts.
7. At the completed installation screen click **Finish** to complete the installation.
8. Restart the **IIS Service.**

Avaya Microsoft CRM Integration Solution Client Installation

The Avaya Microsoft CRM Integration Solution Client and Server components are available from a single CD. During the installation of the client software the IP Office TAPI and Microsoft .NET 2.0 are also installed.

1. Insert the CD into the CD Drive.

2. If the CD does not autorun. Open **My Computer** and select the CD Drive.

3. Double Click the **Setup.exe** file

4. Select the IP Office.

5. Click Next.

6. Select the Folder for installation.

7. Select **Microsoft CRM Client**. Follow the on screen prompts.

8. The Microsoft .NET 2.0 Framework is installed.

9. Select IP Office Unit & Click Next.

10. Select the User Name & Password of the User you want to associate with the Avaya Microsoft CRM Integration Solution. Click **Next**.

11. At the completed installation screen click **Finish** to complete the installation.

The Application is now installed to the following path on the Start Menu. **Start/Programs/IP Office/MS CRM Integration.** It is also added to the Startup folder, this will automatically start the application when you start your PC.

.NET Framework

The Microsoft .NET Framework 2.0 is automatically installed when the Avaya Microsoft CRM Integration Solution Client is selected. The Microsoft .NET 2.0 is required for the Client components of the Avaya Microsoft CRM Integration Solution. It is only installed if the Microsoft .NET 2.0 is not detected on the destination machine.

Configuring Avaya Microsoft CRM Integration Solution

Launching Microsoft CRM Integration Solution

Follow the steps to start the Avaya Microsoft CRM Integration Solution.

1. Click the **Start** button on the Windows Taskbar.

2. Point to **Programs**.

3. Point to **IP Office**.

4. Click **MS CRM Integration**.

5. The following message is display when login is successful. **You have been authenticated by the Microsoft CRM Server (name).**
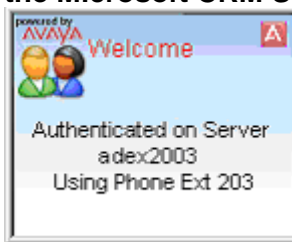
- This icon appears in the status bar when the application is loaded.

Avaya Microsoft CRM Integration Options

The Avaya Microsoft CRM Integration Options consists of **Preferences** and **Configuration** tabs.

Avaya Microsoft CRM Integration Options - Preferences

The Preferences tab allows you to change the preferences for Call Handling, Activity Creation and Resolution of inbound calls.

Unknown Call Handling

The **Unknown Call Handling** allows you to control the behavior of the Avaya Microsoft CRM Integration Solution when you receive an inbound unknown caller. You can select one of the following behaviors.

- **Take No Action** - No Action will be taken.

- **Open A New Contact Form** - The Avaya Microsoft CRM Integration Solution will automatically open a new contact form, allowing you to enter contact information about the caller.

- **Open A New Account Form** - The Avaya Microsoft CRM Integration Solution will automatically open a new account form, allowing you to create a new account for the caller.

Phone Call Activity Creation

The **Phone Call Activity Creation** allows you to control the creation of phone call activity records. A phone call activity record can only be created for calls which are resolved to a single entity. They are only created when a call is connected.

Create On Outbound Calls - Check this check box to create a phone call activity record for outbound calls.

Create On Inbound Resolved Calls - Check this check box to create a phone call activity record for inbound resolved calls.

When Resolving Inbound Calls - Include

The **When Resolving Inbound Calls** allows you to control what is included when trying to resolve multiple matches. Refer to Resolve Multiple Matches for more information.

Leads - Check this check box to include leads in the criteria for resolving multiple matches.

Phone Call Activities - Check this check box to include phone call activities in the criteria for resolving multiple matches.

Click **OK** to save any changes. To exit and discard any changes click **Cancel**. Changes made to the Preferences tab are dynamic. The application does not need to be restarted for the changes to take effect.

Avaya Microsoft CRM Integration Options - Configuration

The Configuration tab allows configuration of the Avaya Microsoft CRM Integration Solution.

Call Control Information - TAPI Driver Settings

The Call Control Information - TAPI Driver Settings are settings associated with the TAPI driver. These settings are derived from the TAPI configuration settings.

> **User Name:** This is name of the User. This is **Read Only** if the TAPI driver is configured to a **Single User**. Otherwise it will be left blank.

> **PBX IP Address:** The IP Address of the IP Office. This is **Read Only** if the TAPI driver is configured to a **Single User**.

Advanced Call Control Configuration

The Advanced Call Control Configuration are settings which allow the Avaya Microsoft CRM Integration Solution to be configured for a specific extension number.

> **Use Explicit Extension Number:** Check this box to specify a explicit extension number

> **Extension Number:** This is the Extension number associated with the extension name.

If your TAPI is configured for first party, then the extension number must match the users IP Office extension.

Call Options

The Call Options allow you to configure a number of aspects for internal and external call handling.

> **Internal Ext No Digits:** This is the number of digits which define an internal extension. When you dial a number which has more than the number of digits specified here, it is automatically treated as an external call. Calls with the same number or fewer digits are as treated internal calls and do not screen pop.

> **External Access No:** Enter the prefix required to access an external line.

Microsoft Dynamics CRM Server Settings

The Microsoft Dynamics CRM Server Settings allows you to configure the Microsoft CRM Server.

> **Server Name:** Enter the Microsoft CRM server name. This is the server which you are connected.

Click **OK** to save any changes. To exit and discard any changes click **Cancel**. Changes made to the Configuration tab are not dynamic. The application needs to be restarted for the changes to take effect.

Call Data Tagging

Call Data Tags enable advanced scenarios to be built around your Microsoft CRM 3.0 and Avaya Microsoft CRM Integration Solution. In situations where CLI/ANI matching is not sufficient, you can add screening and specific data collection interactions with your customers using the VoiceMail Pro. The Voicemail Pro assisted transfer action can be used to pass data to users and pop matching records based on that data.

Based on your solutions requirements, you could obtain and verify the data collected, and then transfer the call with a data tag, that will utilize your specific criteria to lookup the required, account, contact or case, once the call is offered.

The tags are conformant xml fragments, they are comprised of an element AV_M and two attributes the Microsoft CRM entity (account, contact, or incident) and the schema name of the field to match on, in this example 'contactid' and the data is the record key.

<AV_M O="contact" S="contactid" >{e44e6dbf-bd2a-da11-badb-505054503030}</AV_M>

<AV_M – element name.

O="contact" – crm entity.

S="contactid" – attribute to search on.

> - end of element attributes

{e44e6dbf-bd2a-da11-badb-505054503030} – the data to match on, this should be unique **</AV_M>** - Closing tag.

The xml element name, attributes names and Microsoft CRM entity and schema names are case sensitive.

Additional Examples

Account – Account Number

<AV_M O="account" S="accountnumber" >TL00001</AV_M>

Case – incident (case number)

<AV_M O="incident" S="ticketnumber" >CAS-01001</AV_M>

Toast

The Avaya Microsoft CRM Integration Solution allows system alerts to be popped to the desktop through toast.

The toast will display a variety of system alerts;

- Inbound calls
- Tapi login
- Microsoft CRM authentication
- Multiple matches against CRM records.
- Microsoft CRM authentication errors
- Tapi login errors

The toast alert also allows you to answer an inbound call;

- Click the text message displayed in the center of the toast alert.

The toast alert will close automatically. To manually close the toast click the ▲ icon in the top right hand corner of the toast alert.

The System Tray

Once installed the Microsoft CRM Integration Solution is loaded into the System Tray.

The Microsoft CRM integration solution can be accessed by either double clicking the [icon] icon or by right clicking and selecting an option from a menu.
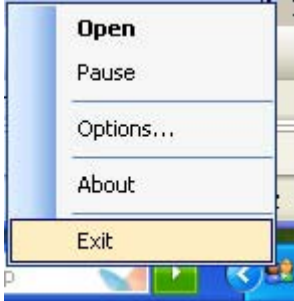
Open: Selecting **Open** will open the Avaya Microsoft CRM Integration Active Calls window.

Pause: Selecting **Pause** will prevent Avaya Microsoft CRM Integration Solution from opening any records. It will not stop the Toast from popping.

Options...: Selecting **Options...** will open the **Avaya Microsoft CRM Integration Options**.

About: Displays the About box, provides details of the version number.

Help: Opens the Avaya Microsoft CRM Integration Solution help system.

Exit: Selecting this will Exit the Avaya Microsoft CRM Integration Solution.

Using Avaya Microsoft CRM Integration Solution

Creating a New Microsoft CRM record

Upon receipt of an unknown inbound call, the Microsoft CRM Integration Solution allows you to create a New Contact, New Account or take No Action. This is configured in the **Preferences** in the Avaya Microsoft CRM Integration Options. Refer to **Unknown Call Handling** in the **Preferences** for more details on the configuration options available.

When a new **Account**, **Contact** or **Phone Activity Record** are created the callers number is automatically populated into the record. **NO** other details are automatically populated. These will need to be inserted manually. When entering a phone number it must be as non formatted text, no alpha characters such as brackets, dashes or spaces must be inserted into the phone number field.

When creating a new CRM record, the **Dial** capability will not appear until the record is saved.

Making a Call

There are a number of ways to make a call using Avaya Microsoft CRM Integration Solution. You can make a call from **Accounts**, **Contacts**, **Leads** and **Phone Activity Records**.

Making a call from an Account

Click the ![Dial icon] icon.

The **Place a Call** window will appear.

Click the number required from the options available. Alternatively, click **Dial Default**. This will dial the number with the ![icon] icon adjacent to it. The **Dial Default** cannot be changed. Phone numbers will only be displayed if there is a phone number in the relevant field in the Account record.

The following fields on the Account are used by the Microsoft CRM Integration Solution for dialing;

- **Main Phone**
- **Other Phone**
- **Phone**

Making a call from a Contact

Click the ![Dial icon] icon.

The **Place a Call** window will appear.

Click the number required from the options available. Alternatively, click **Dial Default**. This will dial the number with the ![icon] icon adjacent to it. The **Dial Default** cannot be changed. Phone numbers will only be displayed if there is a phone number in the relevant field in the Contact record.

The following fields on the Contact are used by the Microsoft CRM Integration Solution for dialing;

- **Business Phone**
- **Home Phone**
- **Mobile Phone**
- **Phone**

Making a call from a Lead

Click the ![Dial icon] icon.

The **Place a Call** window will appear.

Click the number required from the options available. Alternatively, click **Dial Default**. This will dial the number with the ![icon] icon adjacent to it. The **Dial Default** cannot be changed. Phone numbers will only be displayed if there is a phone number in the relevant field in the Lead record.

The following fields on the Lead are used by the Microsoft CRM Integration Solution for dialing;

- **Business Phone**
- **Home Phone**
- **Other Phone**
- **Mobile Phone**

Making a call from a Phone Activity Record

Click the icon.

The **Place a Call** window will appear.

Click the number required from the options available. Alternatively, click **Dial Default**. This will dial the number with the icon adjacent to it. The **Dial Default** cannot be changed. Phone numbers will only be displayed if there is a phone number in the relevant field in the Phone Activity record.

The following field on the Phone Activity Record are used by the Microsoft CRM Integration Solution for dialing;

- **Phone Number**

Answering a Call

Using the Avaya Microsoft CRM Integration Solution there are a number of ways to answer your call through the PC.

Through the Toast

The toast alert also allows you to answer an inbound call;

- Click the text message displayed in the center of the toast alert.

For more information on the toast, see Toast.

Using the Active Calls window

Calls can be answered from the **Active Calls** window. An Inbound call will be displayed in the Active Calls window. To answer the double click the call.

For more information on the toast, see Active Calls.

Active Calls

The Active calls window displays all the active inbound or outbound calls.

The active call window displays a call depending on the association made between the inbound or outbound call. Calls are categorized in groups depending on the association or activity. They are represented as either **Contacts**, **Accounts**, **Leads**, **Phone Call Activities**, **Multi Party**, **Cases** or **No Matching CRM Records**.

Within each call the following information is displayed;

- **Name** - This is the information associated with the call. The content of these fields will depend if the data is populated in the Microsoft CRM Solution.

    - **Contacts** - Within each Contact, the **Name** field is used to present the Name in the Active Calls window.

    - **Accounts** - Within each Account, the **Name** field is used to present the name in the Active Calls window.

    - **Leads** - Within each Lead, the **Name** field is used to present the name in the Active Calls window.

    - **Phone Activity** - Within each Phone Activity record, the **Subject** field is used to present the name in the Active Calls window.

    - **Multi Party** - This is a system message. The callers number occurs in a number of records and needs to be resolved. Refer to Resolve Multiple Matches for more information.

    - **Cases** - Within each **Case**, the **Title** field is used to present the name in the Active Calls window. (Cases are only displayed via Data Tagging).

- **Callers Number** - The Callers Number associated with the telephone call.

- **Call Status** - Displays the status of the call. Calls can either be **Ringing**, **Connected** or **Held**.

- **Call Direction** - This is the direction of the call.

- **Start Time** - This is the time the call started.

Resolve Multiple Matches

Resolving multiple matches occur when the callers number is associated with more than one record.

When you receive a **Callers Number** which has Multiple Matches, you can either Click the text in the **Toast** or from the **Active Call** window select the call.

The records can be **Contacts**, **Accounts**, **Leads and Phone Call Activities**.
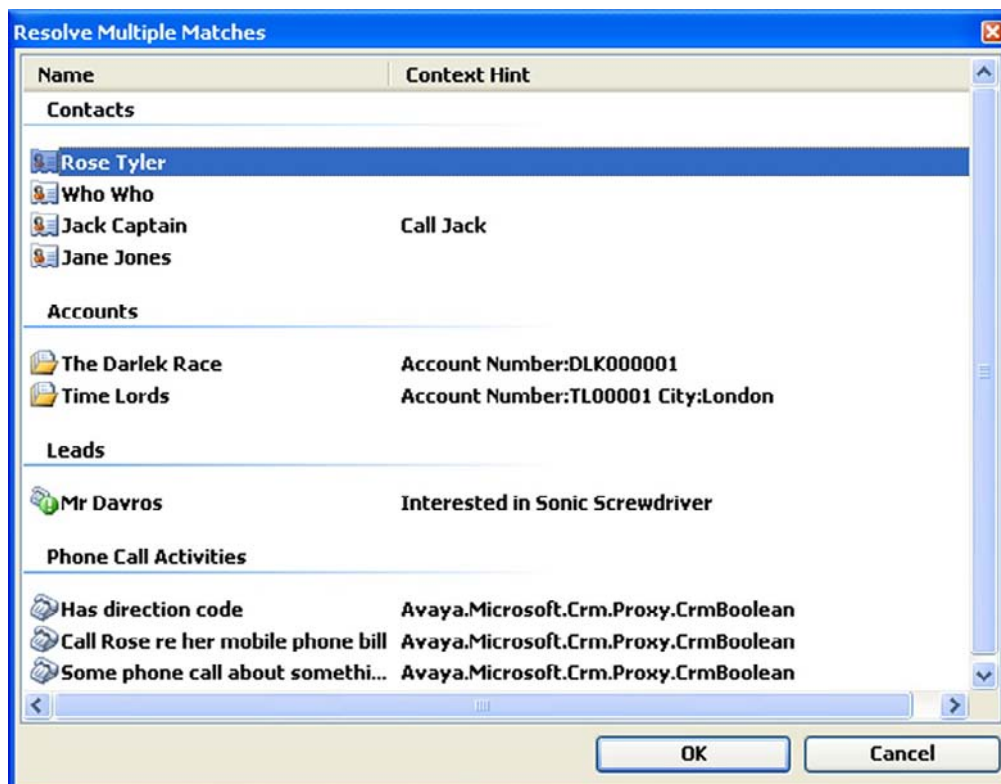
To resolve the call. Select the record you want to associate the call with. The contents of the Resolve Multiple Matches window is configurable refer to **When Resolving Inbound Calls - Include** in the Microsoft CRM Integration Preferences.

Appendix A: Manual Installation

Manual Installation Microsoft CRM Server Resources

The following instructions are provided to allow manual installation of the Microsoft CRM server side resources and configuration if required, and to provide clarity on the actions carried out during deployment via the application installation package.

Overview

The following instructions are designed to provide guidance on installing the necessary Avaya resources and configuration settings, manually.

You 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 (CD or download).

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

The customization can be added to the following entities:

<Entity name="account">

<Entity name="contact">

<Entity name="lead">

Full Lead Example

The following shows the full entity after the customization has been completed.

<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 when making changes should be applied.

Client Installation Notes

The default website within IIS, by default, uses the port number 80. In the event that the MSCRM
installation has had the option to create a new website selected, it will use port number 5555.

The client installation will assume the web server connection to be port 80. If a new MSCRM website has
been created then 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="crmportNumber" serializeAs="String">

   <value>5555</value>

3. Save changes and restart the CRM client application.

TAPI Driver

The TAPI driver is installed during the client deployment. Uninstalling the application will remove the
TAPI driver, if you have any other applications that are dependant on TAPI, you should reinstall the TAPI
driver from the IP Office User CD.

If the User CD is uninstalled, the TAPI driver, may be removed, you should run Repair to have the Avaya
Microsoft CRM application replace the driver if necessary.

Index