Phone Manager Application Support - Microsoft Dynamics CRM

DECEMBER 2016 DOCUMENT RELEASE 5.0 APPLICATION SUPPORT



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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) | 0 | 0 | |
| v6 (2013) | I | | |
| v7 (2015) | I | I | |
| v8 (2016) | | | |

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.

| /// → ↑ | | \oplus | Isa Sastre Mitel | ې 🔍 | ? | | |
|---------------------|----------------|----------|----------------------------|-----------------------------|---|----------------------|------------|
| CONTACT - | | | | ↑ ↓ | ল | | |
| Luka | Раре | | | ^{ner*} 1 Sastre | | | |
| Summary | | | | | ^ | | |
| CONTACT INFORMATIC | DN . | | | | | | |
| Full Name* | Luka Pape | | | POST | | | |
| Job Title | | | | | | | |
| Company Name | E <u>MITEL</u> | | | | | د. د | _ × |
| Email | | | | | | ands source converse | |
| Business Phone | 2225554444 | | | | | 7774441111 | 00:02 |
| Mobile Phone | 7774441111 | | | | | 7774441111 | |
| Fax | | | | | | | |
| Preferred Method of | Any | | | | | | |
| Address | | | | | ~ | | |
| Active | | | | | | | Clear call |

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.

| Multiple Contacts Found – 🗆 🗙 | | |
|--|--------------------------------------|--------------|
| Results Contact: Pippa Crane Account: BUSINESS CONTACT Contact: Alberto Puga Account: BUSINESS CONTACT Contact: Aurora Rojas Account: BUSINESS CONTACT | | |
| | C 2225554444 2225554444 | _ × 00:01 |
| Display | | Clear call |

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

| | Microsoft Dynamics CRM | | | | | | |
|----------|---|---------|---------|--------------|-------------|--|--|
| Settings | Server | Profile | Options | Call Details | Activitie 1 | | |
| | Screen Pop Accounts Contacts Leads | | | | | | |
| | No Match Options Image: Weight of the second sec | | | | | | |

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.

| 0 | Advanced Search – 🗖 🗖 | | | | | |
|------------|-----------------------|--------------|---|--|--|--|
| | | | | | | |
| | | | | | | |
| First Name | Last Name | | | | | |
| Postal/Zip | Check Date of Birth | 2014-03-10 🗸 | | | | |
| | | | | | | |
| | | Display | : | | | |

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.

| Microsoft Dynamics CRM | | | | | | | |
|-----------------------------|---|-------------|----------|-------|--|--|--|
| Account Fields | Contact Fields | Lead Fields | Advanced | / • • | | | |
| -Related Search | nes | | | | | | |
| Search fo | Search for related entities | | | | | | |
| Select the re | ated Entites to s | earch for: | | | | | |
| Opportu | ✓ Opportunities ✓ Incidents / Cases ✓ Tasks | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

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.

Microsoft Dynamics CRM

| Account Fields Contact | t Fields | Lead Fields | Advanced | 1 • |
|--|-------------------------------------|---|----------|--------|
| Select the CRM contact telephone numbers to search | Hom Teler Fax Assis Man | ness Phone ne Phone ohone3 tant Telephor ager Telephor ile Telephone | ne | ^ ~ |

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 | I |
| Home Phone | telephone2 | 0 |
| Telephone3 | telephone3 | 0 |
| Fax | fax | 0 |
| Assistant Telephone | assistantphone | 0 |
| Manager Telephone | managerphone | 0 |
| Mobile Telephone | mobilephone | 0 |
| Pager | pager | 0 |
| Primary Address Phone 1 | address1_telephone1 | 0 |
| Primary Address Phone 2 | address1_telephone2 | 0 |
| Primary Address Phone 3 | address1_telephone3 | 0 |

Account Entities

| Field name | Field description | Enabled? |
|-------------|-------------------|----------|
| Main Phone | telephone1 | 0 |
| Other Phone | telephone2 | I |

| Fax | fax | |
|----------------|-------------------|----------|
| Lead Entities | | |
| Field name | Field description | Enabled? |
| Business Phone | telephone1 | |
| Home Phone | telephone2 | I |
| Other Phone | telephone3 | |
| Fax | fax | I |
| Mobile Phone | mobilephone | I |
| 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 | (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.

Microsoft Dynamics CRM

| Information Select the call details to use for the search. Multi select items to use more DNIS/DDI Name | Profile | Options | Call Details | Activities | Account Fields | 1 | ۲ |
|---|------------------------------------|---|---|------------|----------------|---|---|
| than one and re order the items in preference of search order. | Sele use sele tha iter | ect the call for the sea ect items to n one and ns in prefe | arch. Multi o use more re order the | Direct | Dial (DDI/DID) | | |

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.

| 🏄 🗸 🏦 Out | bound Outboun 🗸 | | | 🕀 🔍 🌣 |
|--|-------------------------------|------------------|-----------------------------------|-------|
| ✓ MARK COMPLETE | X CLOSE PHONE CALL | CONVERT TO - | X DELETE | 全 小 河 |
| PHONE CALL | | | | |
| Outbou | ind Answe | red | | |
| Priority Normal | Due 7/23/2014 11:11 AM | Status* Open | ^{Owner*} Sergio Araya | |
| Subject * | Outbound Answere | d | | |
| Call From * | Sergio Araya | u | | |
| Call To * | Sergio Araya | | | |
| Phone Number | +44 1291 430000 | Direction | Outgoing | |
| Description | | | | |
| Phone number: + DDI: DDI Name: Direction: Outbo Account Code: Trunk: 94308 Transferring Exte | und | | | |
| Call Recording: ht | ttp://callrecorder/default.as | px?recid=1574601 | | |

| 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 on. |
| 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 are not known until the call is cleared. |
| Call Recording | If integrating with a 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 recorder will 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.

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|---------|
| |
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| |
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| |
| |
| |

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

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

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

| Mic Mic | rosoft | Dynar | nics | CRM | |
|--|----------|-----------------------|--------|-----------|-----|
| Lead Fields | Advanced | Activities | States | Prorities | - F |
| Activity Pr Select the activity pr include. | CRM | Low Normal High | | | |

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

Lead Fields Advanced Activities States Prorities Image: Constraint of the states Activity States Select the CRM activity states to include. Busy Out of Office Free Tentative

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

| Mic Mic | rosoft | Dynar | nics | CRM | |
|--|----------|------------------------------|--------|-----------|-----|
| Lead Fields | Advanced | Activities | States | Prorities | • • |
| Activities Select the activity typ include. | | Appoint Task Service A | | | |
| mendue. | | Phone C Fax Letter | | | |
| | | | | | |

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.

| M | licros | oft D | ynam | nics CRI | N | | |
|----------|--------|----------|---------|--------------|-----------|---|---|
| Settings | Server | Profile | Options | Call Details | Activitie | • | ۲ |
| Inform | ation | | | | | | |
| Vers | ion M | SCRM 6.0 | (2013) | | ~ | 1 | |
| | | | | | | 1 | |
| | | | | | | | |
| | | | | | Test | | |

Server connection

. .

The specific connection details to the CRM server need to be set on the Server tab.

| | licros | oft D | ynam | nics CRI | N | | |
|------------|------------|-----------|----------|------------------------------|-----------|---|---|
| Settings | Server | Profile | Options | Call Details | Activitie | • | ۲ |
| Server | Details — | | | | | | |
| Disco | overy Serv | er | mitel5.s | erver.com | | | |
| v D | oes this s | erver use | SSL? | | | | |
| Orga | nisation N | Name | Mitel | | | | |
| | | | | name (found a ge in CRM). | at the | | |

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.

For the Microsoft hosted version use the following based upon the organisation location.

| Location | Discovery Server |
|---------------------------------------|-------------------|
| North America | crm.dynamics.com |
| North America 2 | crm9.dynamics.com |
| Europe, Middle East and Africa (EMEA) | crm4.dynamics.com |
| Asia Pacific Area (APAC) | crm5.dynamics.com |
| Oceania | crm6.dynamics.com |
| Japan (JPN) | crm7.dynamics.com |
| South America | crm2.dynamics.com |

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.

| 🚈 🤟 📩 🖌 🖌 🖌 | Contacts 🗸 | New Contact | \oplus | Miles Jarvis Mitel | \sim | \$? |
|-------------|--------------|-------------|----------|------------------------------|--------|---------|
| | | | | | | |

Authentication and profile details

The Profile tab enables the security credentials used to access Microsoft Dynamics CRM to be configured.

| Settings | Server | Profile | Options | Call Details | Activitie 4 |
|----------|------------|----------|------------|---------------|-------------|
| Details | | | | | |
| 🗌 Us | se Integra | ted Wind | ows Authe | ntication (IW | A) |
| | | | | | |
| ✓ Us | sing Offic | e 365 Ac | count to L | ogin? | |
| Usern | - Г | | encia@mite | | |

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.