



TelephoneIntegration Getting Started from AppSource

Hello!

Thank you for your interest in TelephoneIntegration. This Getting Started Guide will help you to install this Add-On from Microsoft AppSource. For detailed information, please take a look at our [guides](#) or [blogs](#).

Important: It is recommended to first test the compatibility of your phone system with the Phone Test Tool. The tool offers two communication channels (TAPI and SIP). You need only one of them to be able to use our CTI addon. Find more information in the [Test Tool Guide](#). There are basically two ways to install TelephoneIntegration from AppSource:

1. Get solution from Marketplace in Dynamics 365

It is possible to start TelephoneIntegration directly from Dynamics 365. Therefore, please navigate to Settings > Solutions and hit the **[Get Solutions from Marketplace]**-button, highlighted in yellow in the figure below.

The screenshot shows the Dynamics 365 user interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. Below the navigation bar, there is a search bar and a 'More Actions' button. The main content area displays a table of solutions. The table has columns for Name, Display Name, Version, Installed On, Package T..., Publisher, and Description. The 'More Actions' button is highlighted with a yellow box.

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
msdyn_PowerAppsCh...	PowerApps Checker	1.0.0.103	5/11/2019	Managed	Microsoft Dynamics 365	PowerApps Checker promotes higher-quality mo...
AutoMergeGlobalButt...	AutoMergeGlobalButt...	2017.1	5/9/2019	Managed	PTM EDV Systeme GmbH	
AutoMergeServerCore	DocumentsCorePack b...	2017.5	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains basic settings for Docume...
DocumentsCorePackS...	MSCRM-ADDONS.co...	2017.2	5/9/2019	Managed	PTM EDV Systeme GmbH	This solution contains the data for DocumentsCo...
MSCRMADDONScom...	MSCRM-ADDONS.co...	2017.39	5/9/2019	Managed	PTM EDV Systeme GmbH	General MSCRM-ADDONS.com Solution.
msdynce_CRMHub	Crm Hub	1.0.20170...	5/4/2019	Managed	Microsoft Dynamics 365	
Crb330e	Common Data Service...	1.0.0.0	5/3/2019	Unmanag...	CDS Default Publisher	

Figure 1: Get solutions from Marketplace

This leads you to the AppSource website where you can search for TelephoneIntegration and is described below.

2. Get solution from AppSource

The second option is to go to the AppSource website and search for TelephoneIntegration. Use this [link](#) to find all add-ons provided by mscrm-addons.com (figure below).

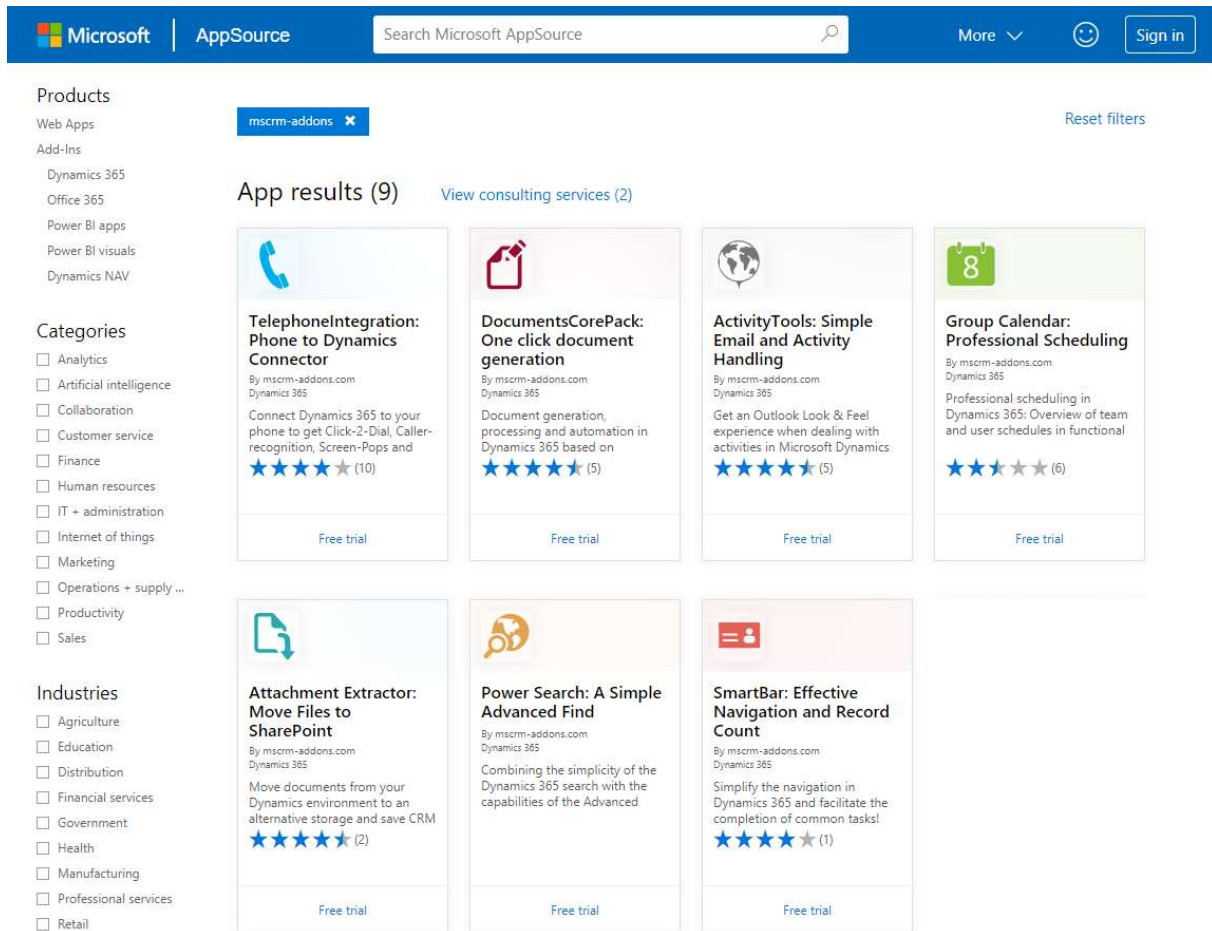


Figure 2: AppSource – solutions by mscrm-addons.com

Next, please select TelephoneIntegration. The so opened window provides you with information regarding TI. Here, please click on the **[FREE TRIAL]**-button on the left side.

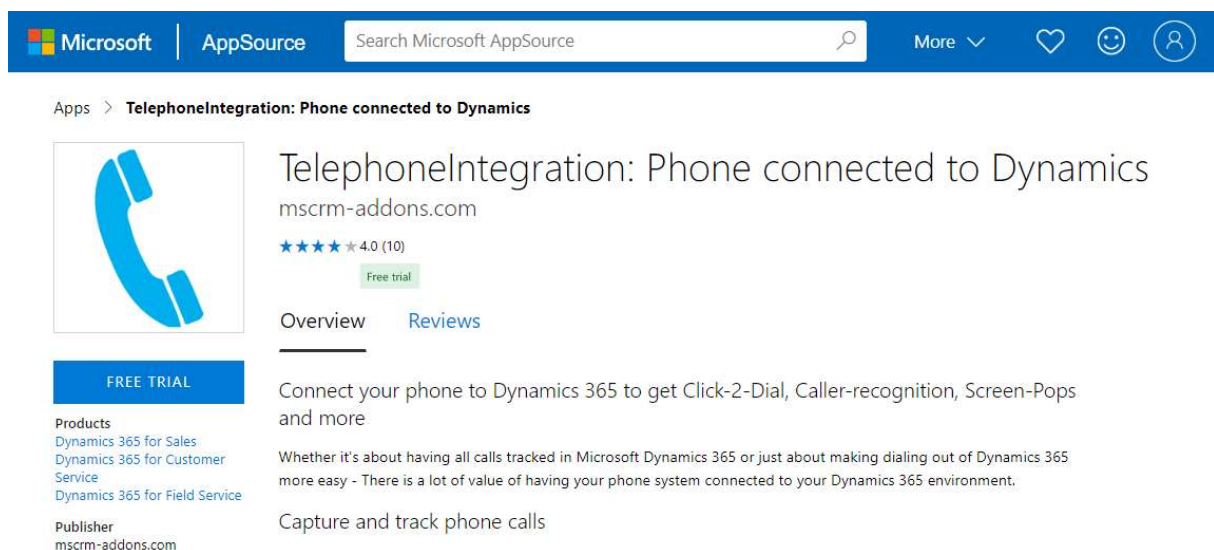
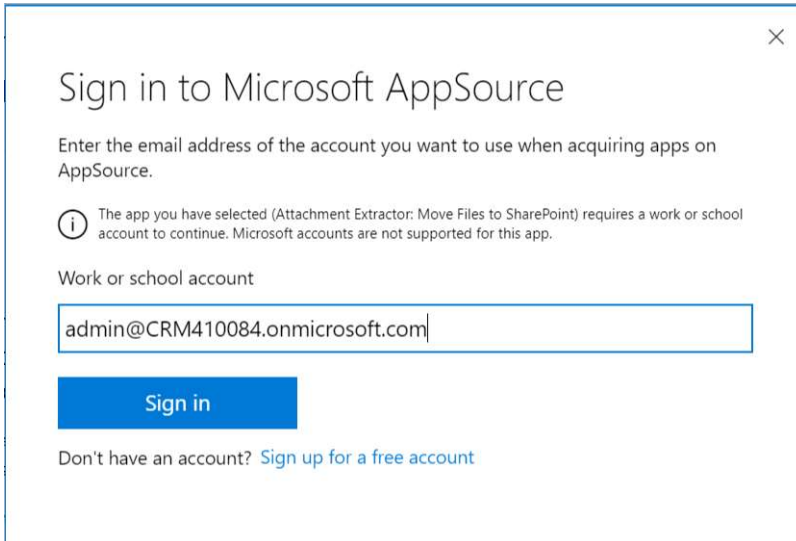



Figure 3: AppSource – TelephoneIntegration

Next, please sign into Microsoft AppSource. Enter your e-mail address and hit the **[Sign in]**-button as you can see in the figure below.



Sign in to Microsoft AppSource

Enter the email address of the account you want to use when acquiring apps on AppSource.

 The app you have selected (Attachment Extractor: Move Files to SharePoint) requires a work or school account to continue. Microsoft accounts are not supported for this app.

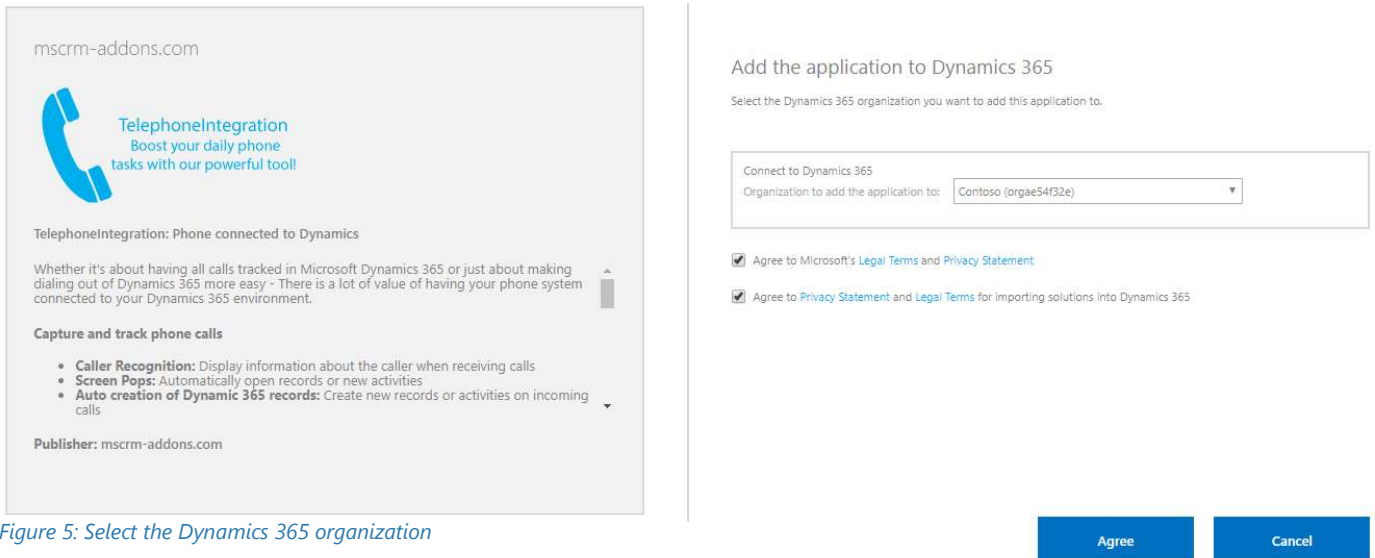
Work or school account

Sign in


Don't have an account? [Sign up for a free account](#)

Figure 4: Sign into Microsoft AppSource

Next, please select the Dynamics 365 organization you want to add the solution to, check the checkboxes below and hit the **[Agree]**-button.



mscrm-addons.com

 **TelephoneIntegration**
Boost your daily phone tasks with our powerful tool!

TelephoneIntegration: Phone connected to Dynamics

Whether it's about having all calls tracked in Microsoft Dynamics 365 or just about making dialing out of Dynamics 365 more easy - There is a lot of value of having your phone system connected to your Dynamics 365 environment.

Capture and track phone calls

- **Caller Recognition:** Display information about the caller when receiving calls
- **Screen Pops:** Automatically open records or new activities
- **Auto creation of Dynamic 365 records:** Create new records or activities on incoming calls

Publisher: mscrm-addons.com

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to:

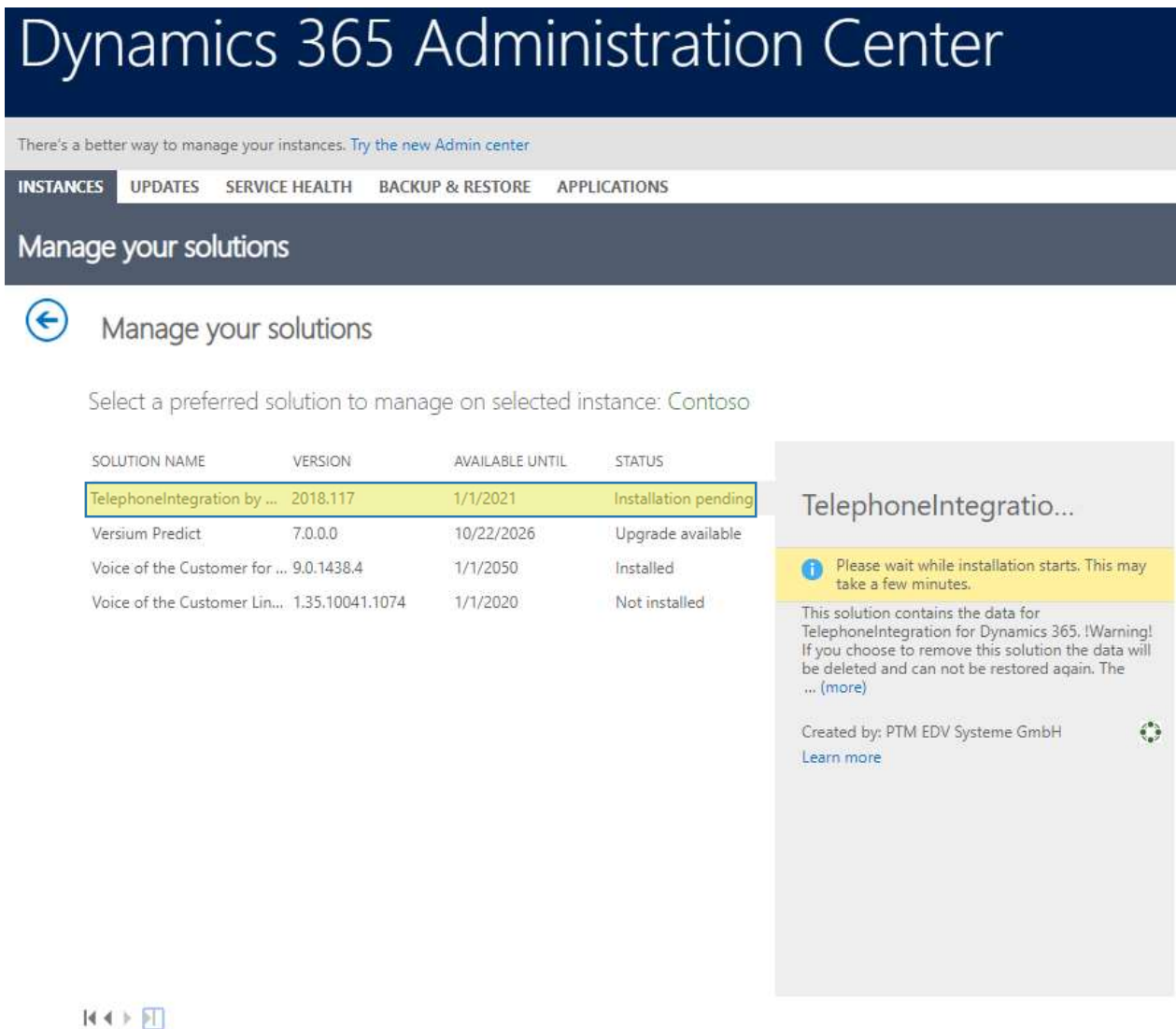
☒ Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

☒ Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree **Cancel**

Figure 5: Select the Dynamics 365 organization

This leads you to your organization overview. The installation takes a while – as you can see TelephoneIntegration has the Status “Installation pending” until the installation is completed (highlighted in yellow).



Dynamics 365 Administration Center

There's a better way to manage your instances. [Try the new Admin center](#)

INSTANCES | **UPDATES** | **SERVICE HEALTH** | **BACKUP & RESTORE** | **APPLICATIONS**

Manage your solutions

← Manage your solutions


Select a preferred solution to manage on selected instance: Contoso

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
TelephoneIntegration by ...	2018.117	1/1/2021	Installation pending
Versium Predict	7.0.0.0	10/22/2026	Upgrade available
Voice of the Customer for ...	9.0.1438.4	1/1/2050	Installed
Voice of the Customer Lin...	1.35.10041.1074	1/1/2020	Not installed

TelephoneIntegratio...

Please wait while installation starts. This may take a few minutes.

This solution contains the data for TelephoneIntegration for Dynamics 365. **!Warning!** If you choose to remove this solution the data will be deleted and can not be restored again. The ... [\(more\)](#)

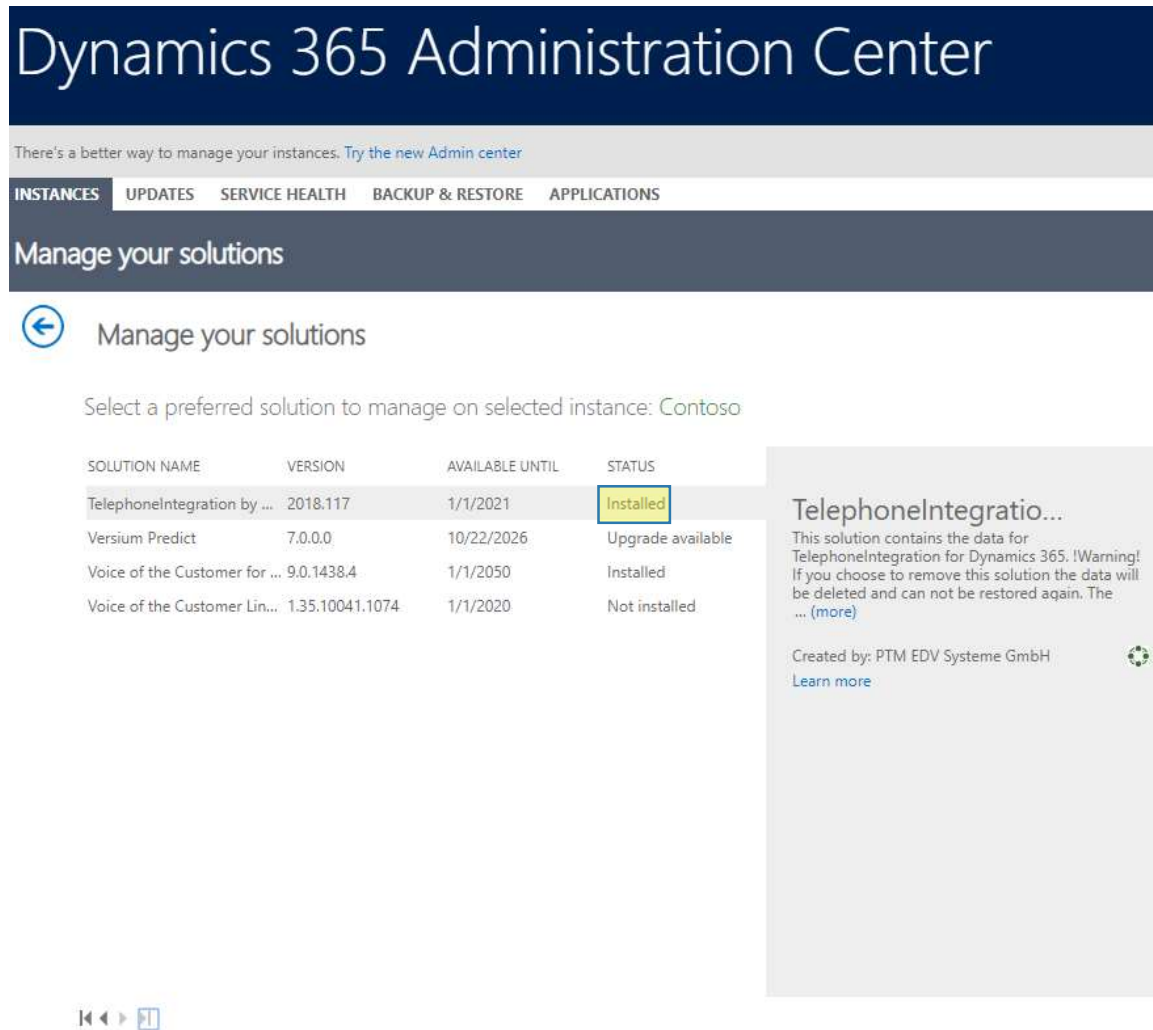
Created by: PTM EDV Systeme GmbH 

[Learn more](#)

Figure 6: Organization overview – TI installation pending

Meanwhile, you will receive an e-mail with more information about TI and its usage.

To see when the installation is finished, please refresh the page in between. Only when the status is on "Installed" you can continue with the process (highlighted in yellow below).



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Manage your solutions

Select a preferred solution to manage on selected instance: **Contoso**

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
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Voice of the Customer Lin...	1.35.10041.1074	1/1/2020	Not installed

TelephoneIntegration...

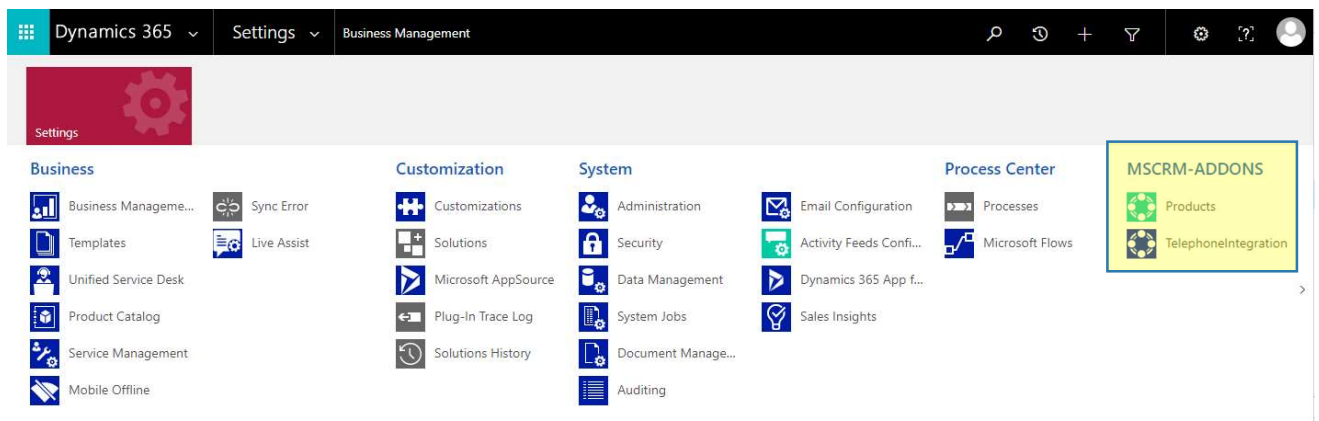
This solution contains the data for TelephoneIntegration for Dynamics 365. **Warning!** If you choose to remove this solution the data will be deleted and can not be restored again. The ... [\(more\)](#)

Created by: PTM EDV Systeme GmbH 

[Learn more](#)

Figure 7: Organization overview – AE installation finished

Congratulations! You have successfully completed the installation of TelephoneIntegration from Microsoft AppSource. If you now open your Dynamics 365 Settings, you will see the MSCRM-ADDONS section containing the so installed solution – TelephoneIntegration (highlighted in yellow).



Dynamics 365 | **Settings** | Business Management

Settings

Business

- Business Manageme...
- Templates
- Unified Service Desk
- Product Catalog
- Service Management
- Mobile Offline

Customization

- Customizations
- Solutions
- Microsoft AppSource
- Plug-In Trace Log
- Solutions History

System

- Administration
- Security
- Data Management
- System Jobs
- Document Manage...
- Auditing

Process Center

- Processes
- Microsoft Flows

MSCRM-ADDONS

- Products
- TelephoneIntegration

Figure 8: Dynamics 365 Settings > MSCRM-ADDONS: TelephoneIntegration

A click on TelephoneIntegration leads you to the TI *Getting Started* page. A window with information about the next steps pops up as you can see below. Please read this carefully and follow the steps.

Installation finished

Congratulations! Default settings have successfully been configured.
This configuration can be changed on the "Entity Configuration" tab.

Next Steps:

- **TelephoneIntegration Client**

1

Install the TelephoneIntegration client on your users desktops machine to connect with your phone system and handle calls.

You can find the download-link on the "Get Started" page behind that dialog.
- **Normalize Phone Numbers**

2

To be able to resolve phone numbers with existing Dynamics 365 records (predefined for Account, Contact and Lead) the numbers have to be normalized.

More information can be found on the "Index Phone Numbers" dialog.

It can be opened via the "Entity Configuration" tab or directly from here via the "Normalize numbers" button.
- **Dial out**

3

The "Call Number" was enabled for entities Account, Contact and Lead. A click will trigger the TelephoneIntegration client and perform the call.


Normalize numbers
Close

Figure 9: TI information about the next steps

1 TELEPHONEINTEGRATION CLIENT

The first step is to install the TI Client on your user's desktop machine to connect with your phone system. Therefore, please click on the **[Download Now!]**-button which leads you to the download area.

Getting Started with TelephoneIntegration



mscrm-addons.com
Your company for MS-CRM ADD-ONS!

Thank you for installing TelephoneIntegration for Microsoft Dynamics CRM!

TelephoneIntegration - Client Access License

connects your phone system(TAPI, Skype, OCS, Lync) with Microsoft Dynamics CRM

Download Now!

TelephoneIntegration Pricing

Check out pricing and licensing options for our solution

Buy Now!

Contact Support
Productpage
Documentation library

Figure 10: Download TI Client

After the download is completed, please unzip the file and run the 'TelephoneIntegration Client for Dynamics 365.exe'. Detailed information about the installation can be found in the [TI Client installation documentation](#).

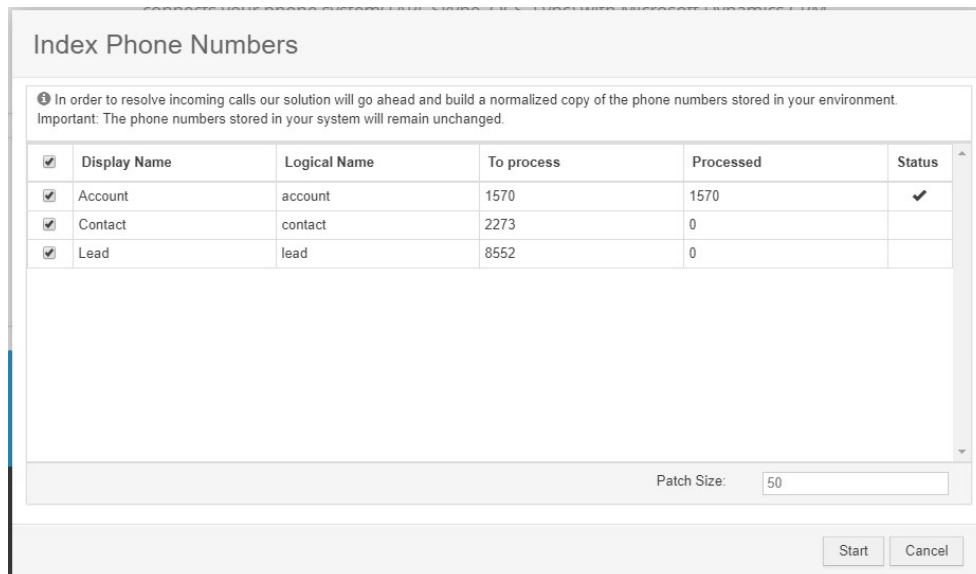
2 NORMALIZE PHONE NUMBERS (OPTIONAL)

In order to resolve incoming calls, our solution will go ahead and build a normalized copy of the phone numbers stored in your environment.

This is optional and brings your whole phone numbers in a uniform format e.g. without slashes, blank spaces, etc.

Important: The phone numbers stored in your system will remain unchanged.

Therefore please click the **[Normalize numbers]**-button. The window below opens where you can select for which entity the numbers should be normalized.



Index Phone Numbers

ⓘ In order to resolve incoming calls our solution will go ahead and build a normalized copy of the phone numbers stored in your environment. Important: The phone numbers stored in your system will remain unchanged.

<input checked="" type="checkbox"/>	Display Name	Logical Name	To process	Processed	Status
<input checked="" type="checkbox"/>	Account	account	1570	1570	✓
<input checked="" type="checkbox"/>	Contact	contact	2273	0	
<input checked="" type="checkbox"/>	Lead	lead	8552	0	

Patch Size:

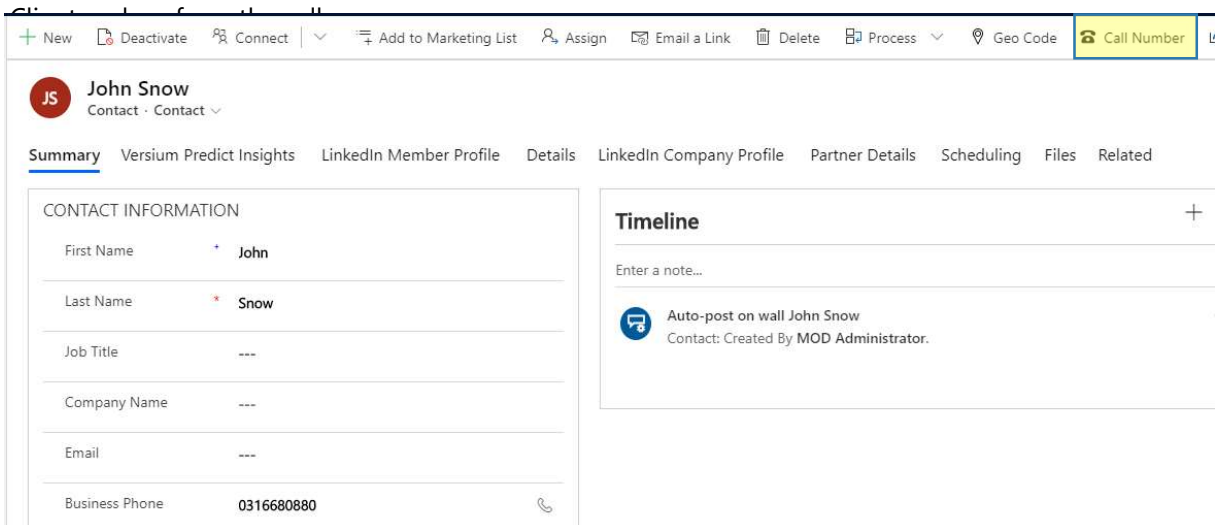
Start Cancel

Figure 11: Normalize numbers

3 DIAL OUT

This functionality can be used only if the TI Client was successfully installed. Per default, the 'Call Number'-button was enabled for the entities Account, Contact and Lead.

Open for example contact and you will see the 'Call Number'-option. A click on it will trigger the TI



+ New Deactivate Connect Add to Marketing List Assign Email a Link Delete Process Geo Code **Call Number**

John Snow
Contact · Contact

Summary Versium Predict Insights LinkedIn Member Profile Details LinkedIn Company Profile Partner Details Scheduling Files Related

CONTACT INFORMATION

First Name * John

Last Name * Snow

Job Title ---

Company Name ---

Email ---

Business Phone 0316680880

Timeline

Enter a note...

Auto-post on wall John Snow
Contact: Created By MOD Administrator.

Figure 12: The 'Call Number'-option

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Contact

For further technical questions, please visit our blog <http://blogs.mscrm-addons.com> or contact support@mscrm-addons.com.

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