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.

![Figure 1: Get solutions from Marketplace](image)

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).

![AppSource - solutions by mscrm-addons.com](image1)

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.

![AppSource - TelephoneIntegration](image2)
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](image1)

**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.

![Select Dynamics 365 organization](image2)

**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).

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).

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

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.

![Figure 10: Download TI Client](image)

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.

![Figure 11: Normalize numbers](image)

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 Client and perform the call.

![Figure 12: The ‘Call Number’-option](image)
List of figures

Figure 1: Get solutions from Marketplace.................................................................1
Figure 2: AppSource – solutions by mscrm-addons.com ........................................2
Figure 3: AppSource – TelephoneIntegration..........................................................2
Figure 4: Sign into Microsoft AppSource .................................................................3
Figure 5: Select the Dynamics 365 organization ....................................................3
Figure 6: Organization overview – TI installation pending ......................................4
Figure 7: Organization overview – AE installation finished ....................................5
Figure 8: Dynamics 365 Settings > MSCRM-ADDONS: TelephoneIntegration .......5
Figure 9: TI information about the next steps .........................................................6
Figure 10: Download TI Client..................................................................................6
Figure 11: Normalize numbers ................................................................................7
Figure 12: The ‘Call Number’-option........................................................................7
Contact

For further technical questions, please visit our blog [http://blogs.mscrm-addons.com](http://blogs.mscrm-addons.com) or contact support@mscrm-addons.com.

For sales and licensing questions please contact office@mscrm-addons.com or the corresponding contact information below.

**Headquarter – Europe**

PTM EDV-Systeme GmbH  
Bahnhofgürtel 59  
A-8020 Graz  
Austria  

Tel Austria +43 316 680-880-0  
Fax +43 316 680-880-25

**Support:**  
7AM - 8PM GMT+1 (Monday-Friday)

**Sales:**  
+43 316 680 880 14  
sales@mscrm-addons.com

www.ptm-edv.at  
www.mscrm-addons.com

**Headquarter – US**

mscrm-addons.com Corp  
1860 North Rock Springs Rd  
Atlanta, GA 30324  
United States  

Tel US +1 404 720 6066

**Support:**  
9AM - 6PM EST (Monday-Friday)

**Sales:**  
+1 404 720 6046  
ussales@mscrm-addons.com

www.mscrm-addons.com