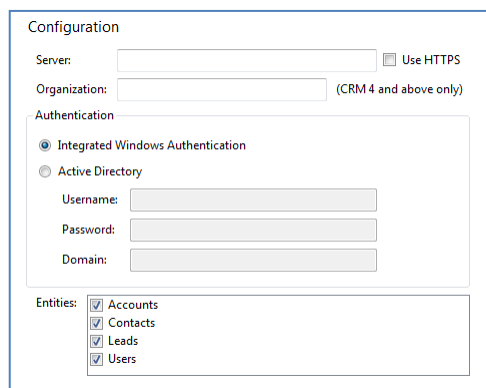# Microsoft Dynamics CRM Addin Guide

This document will guide you through configuration of the Microsoft Dynamics CRM addin. Microsoft Dynamics CRM is a bit of a mouthful so we'll refer to it as 'Dynamics' from now on. It is expected that you are already familiar with the Address Book and Preview window, and the basic concepts of integration and screen popping using the addins. See the User Guide for these topics.

Configuration

Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up. In the 'Integration' area, click the '(Add new)' button, select 'Microsoft Dynamics CRM' from the 'Type' dropdown box and then click the 'Set' button.

On the 'Configuration' group, enter your Dynamics account login information.

In the 'Server' text box, you need to enter the unique web or IP address you go to to access your Dynamics account online e.g. http://www.dynamicscrm.com or http://127.0.0.1. You'll find this info in Internet Explorer's address bar when you login to Dynamics.

For those of you using version 4 or above of Dynamics, the 'Organization' info that needs to be entered can also be found in the address bar and it usually follows immediately after the web or IP address.

So, as an example, let's say that the following is displayed in your address bar when you login to Dynamics:

http://127.0.0.1/ExampleCompany/main.aspx

You would enter 'http://127.0.0.1' into the 'Server' textbox and 'ExampleCompany' into the 'Organization' textbox.

If your web or IP address starts with 'https' instead of 'http', make sure the 'Use HTTPS' box is ticked.
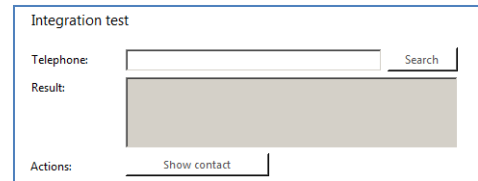
In the 'Authentication' group, select which type of authentication to use. Most users will be able to use the 'Integrated Windows Authentication' option. Consult your system administrator to find out if you need to use 'Active Directory' authentication; they will be able to provide the details you need to enter into the 'Username', 'Password' and 'Domain' textboxes if you require them.

Select which of your Dynamics account modules you want to be used by ticking the corresponding boxes in the 'Entities' section.
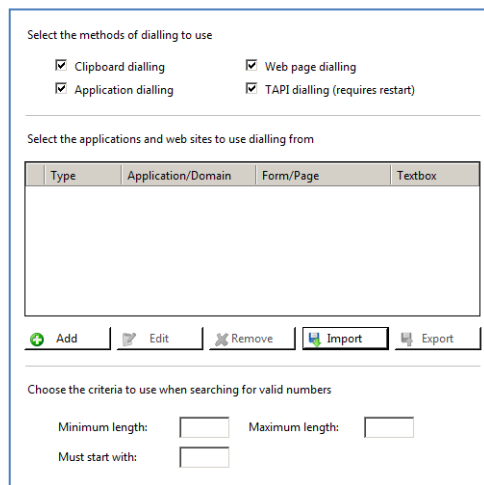
Testing

To test if the configuration worked, enter a phone number from your Dynamics account into the 'Telephone' box in the 'Integration test' area and click the 'Search' button. The results will be displayed after a few seconds.

If the test does not work, go to the 'Log' page of configuration and turn on logging, then do the test again and see if there are any errors in the log.

Dialling configuration

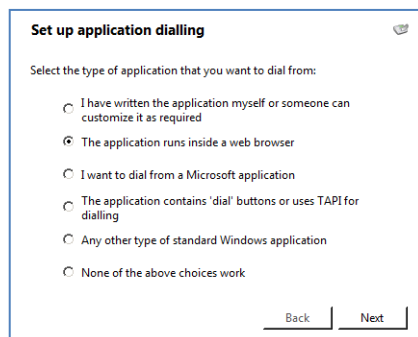To dial out from within Dynamics, dialling needs to be configured correctly.

Right-click the tray icon in the system tray menu and then left-click the 'Configuration' option from the menu that pops up, this will open the 'Configuration' screen. In the 'General' group, click on the 'Dialling' option.

Make sure the 'Web page dialling' box is ticked. This converts the telephone numbers identified on web pages into hyperlinks you can click to dial the number.

You can refine the criteria used to identify telephone numbers. Enter the appropriate number of digits into the 'Minimum length' and 'Maximum length' text boxes and specify a prefix that identifies telephone numbers (if there is one) by entering it in the 'Must start with' box.

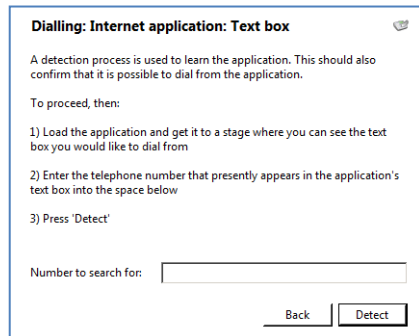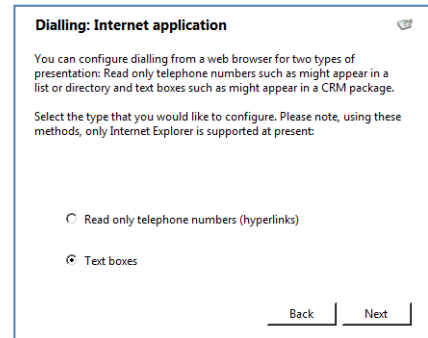If you would like to be able to dial directly when you are entering new information in Dynamics e.g. on the edit contact details page, we need to carry out some further configuration so click the 'Add' button to start the Dialling wizard.

The first question in the wizard asks you about the type of application you want to dial from. Select the 'The application runs inside a web browser' option.
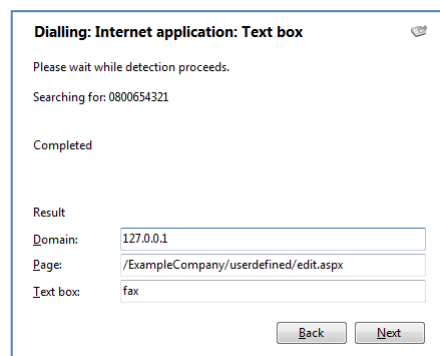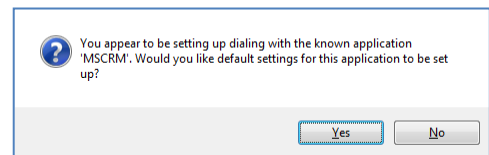
Click the 'Next' button.

We've already covered converting identified numbers into hyperlinks so select the 'Text boxes' option on the second screen of the wizard and click the 'Next' button.

Dialling: Internet application

You can configure dialling from a web browser for two types of presentation: Read only telephone numbers such as might appear in a list or directory and text boxes such as might appear in a CRM package.

Select the type that you would like to configure. Please note, using these methods, only Internet Explorer is supported at present:

○ Read only telephone numbers (hyperlinks)

● Text boxes

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Dialling: Internet application: Text box

A detection process is used to learn the application. This should also confirm that it is possible to dial from the application.

To proceed, then:

1) Load the application and get it to a stage where you can see the text box you would like to dial from

2) Enter the telephone number that presently appears in the application's text box into the space below

3) Press 'Detect'

Number to search for: [_____]

Back | Detect

Open your Dynamics account in Internet Explorer and find the text box you want to dial out from, it needs to have a number in it already so add one temporarily if necessary. Copy or make a note of the telephone number in the text box and leave the web page open.

Back in the wizard, paste or type the number into the 'Number to search for' box and click the 'Detect' button.

The wizard recognises that you are setting up dialling with Dynamics (a.k.a. 'MSCRM') and asks you if you would like to use the default settings for it. These are fine for most users so click 'Yes'.

You appear to be setting up dialing with the known application 'MSCRM'. Would you like default settings for this application to be set up?

Yes | No

Dialling: Internet application: Text box

Please wait while detection proceeds.

Searching for: 0800654321

Completed

Result

Domain: 127.0.0.1

Page: /ExampleCompany/userdefined/edit.aspx

Text box: fax

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If you want to dial from a text box not included in the default settings, you will need to add it manually. Follow the instructions above starting with clicking the 'Add' button again and working through as before but click 'No' if asked whether you want to setup default settings.

The wizard will search the current web page for the telephone number you entered and, once found, display the details. Click 'Next' and then 'Close'. You can add as many textboxes as you like, just start the process by clicking the 'Add' button and working your way through again.

Click 'Save' to store your settings and you're ready to go. Now, a clickable icon is placed at the end of any textboxes you have configured and you just click on it to dial the number in the textbox. Refresh the page in Dynamics to see it in action.