

How to configure caller recognition and screen-pop for:

Microsoft Dynamics CRM

Supported versions: Dynamics CRM 2013 Contact replication method: OLE/ODBC Screen pop method: Uri link

Prerequisites

The Microsoft Dynamics CRM integration uses OLE/ODBC to replicate data from a table, view or custom query. Valid database credentials and knowledge of Microsoft Dynamics CRM database is required.

Notes

Dial from Microsoft Dynamics CRM 2013 is easy, just click on a phone number hyperlink to dial. The first time your browser may request your permission to associate '<u>skype</u>.' uri links with MakeCall.exe. Please note that in case Skype or MS Office 365 / Lync is installed, the skype uri handling is overridden by these applications. In any case you can select a phone number and dial with the client hotkey (PAUSE).

Summary

ACCOUNT INFORMATION





Configuration steps

 Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> From the list of applications, choose 'Microsoft Dynamics CRM', as shown below



2) Press "Configure" to configure the ODBC connection.

CloudCTI Recogni	ion Configuration Tool	>
lease configure	the data link to your MS Dynamics CRM MSSQL dat	abase 💼
Configure	No ODBC selected	
		Back Next Cancel



3) Select "Microsoft OLE DB Provider for SQL Server" and press "Next >>"



4) Fill in the server name, credentials and select the Microsoft Dynamics CRM database.Check the option "Allow saving password"

📑 Data Link Properties 🗾 💌				
Provider Connection Advanced All				
Specify the following to connect to SQL Server data: 1. Select or enter a server name:				
MSCRMSVR				
 Enter information to log on to the server: Use <u>W</u>indows NT Integrated security 				
Use a specific user name and password:				
User <u>n</u> ame: user				
Password:				
Blank password Allow saving password				
Select the database on the server:				
database 👻				
Attach a database file as a database name:				
Using the filename:				
Iest Connection				
OK Cancel Help				



5) Select a table, view or use a custom query to obtain recognition data

cube coningui	e the data link to your MS Dynamics CRM MSSQL database 📷
Configure	Provider=MSDASQL.1;Password=Welkom1;Persist Security Info=True;User ID=sa;Data Source=Microsoft CRM
Use an existing ta	
RNDTEST	r_MSCRM
Acco	unt
Acco	untBase
Acco	untExtensionBase
Acco	untLeads
Activ	ityAttachment
Activ	ityAttachmentAslfPublished
Activ	ityAttachmentLogical
Activ	ityAttachmentLogicalAslfPublished
Activ	it/MimeAttachment
Use an ODBC que	ery
SELECT dbo.Acc dbo.AccountBas dbo FROM dbo. dbo	:ountBase,AccountId, dbo.AccountBase.Name, dbo.AccountBase.AccountNumber, dbo.AccountBase.Telephone1 se.Telephone2, .AccountBase.Telephone3, dbo.AccountLeads.VersionNumber AccountBase LEFT OUTER JOIN >,AccountLeads ON dbo.AccountBase.AccountId = dbo.AccountLeads.AccountId
SELECT dbo.Acc dbo.AccountBas dbo FROM dbo. dbo Test query	:ountBase.AccountId, dbo.AccountBase.Name, dbo.AccountBase.AccountNumber, dbo.AccountBase.Telephone1 se.Telephone2, .AccountBase.Telephone3, dbo.AccountLeads.VersionNumber AccountBase LEFT OUTER JOIN .AccountLeads ON dbo.AccountBase.AccountId = dbo.AccountLeads.AccountId

6) The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue. Make sure you add an Account ID field (UUID) to use for application pop up

🥽 CloudCTI Recognition Configuration Tool					
Configure the recogn	ition fields				
AccountId	Name	AccountNumber	Telephone1	Telephone2	
Custom field \sim	Custom field \sim	Custom field V	Phone number V	Phone number	
(FA9EFA56-D045-E111-953) (FC9EFA56-D045-E111-953) (FC9EFA56-D045-E111-953) (009FFA56-D045-E111-953) (009FFA56-D045-E111-953) (009FFA56-D045-E111-953) (009FFA56-D045-E111-953) (009FFA56-D045-E111-953) (109FFA56-D045-E111-953) (109FFA56-D045-E111-953) (109FFA56-D045-E111-953) (109FFA56-D045-E111-953) (109FFA56-D045-E111-953) (109FFA56-D045-E111-953)	Flori Intei Afgr Maz Sens Paar Vigil Cact Che Tani Dier Wou Van Gem		+31297 +31235 +31314 +31555 +31402 +31226 +31226 +31570 +31206 +31302 +31316		
(1A9FFA56-D045-E111-953) (1C9FFA56-D045-E111-953) (209FFA56-D045-E111-953) (209FFA56-D045-E111-953) (249FFA56-D045-E111-953) (269FFA56-D045-E111-953) (289FFA56-D045-E111-953) (249FFA56-D045-E111-953) (249FFA56-D045-E111-953) (249FFA56-D045-E111-953) < ►	Wer Verv W. E Rod Stor Fort Rest Porr All K Ad v		+31402 +31355 +31172 +31594 +32926 +31134 Back	> Next Cancel	



7) Choose which fields to display in the call notification on an incoming call.

0	Incoming call Accountid: Accountid Name: Name Caller number: Caller numbe Application name: Applicatio	r on name		
* Wind	ws allows a maximum of 255 charact	ers		
	Add recognition field	Add call field]	

8) Change [ServerName] and [DatabaseName] to pop up your Microsoft Dynamics CRM Use the ID from data replication source to pop up the correct customer card. You can use "Test script" to test the URL with the default browser

🧔 CloudCTI Recognition Configuration Tool			×	
Enter the webpage you want to open To construct the correct URL with the informat replace [DatabaseName] with the name of the	ion from the recogniz database, and replace	ed contact, replace [ServerName] with t [SearchField] with the field containing i	he name of the server, the contact identifier.	
Script name Open in Microsoft CRM				
Webpage	bpage http://MyServer/Database1/main.aspx?etc=1&id=\$(AccountId)&pagetype=e		intld)&pagetype=entityreco	
Click on a recognition field to add it to the web AccountId Name AccountNumber Telephone1 Telephone2 Telephone3 VersionNumber	page	Click on a call field to add it to the web Caller number Caller name Device number Ddi number Ddi number Ddi name Start time Application name	ipage	
Restore the default webpage				
Test script			Finish Cancel	



9) You can add additional scripts. Press 'Next' to continue.

CloudCTI Recognition Configuration Tool	×
Which actions do you want to perform? The MS Dynamics CRM 'Show Contact' script is configured. Optionally, you can add extra scripts to the incoming call notification.	
Open in Microsoft CRM Opens the Microsoft CRM contact using a hyperlink	Ŵ
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next C	ancel

10) Check the configuration summary and click finish to add the recognition from Microsoft Dynamics CRM

CloudCTI Recognition Configuration Tool	×
Summary	
Application	
MS Dynamics CRM	
Recognition	
Recognition from ODBC by custom query	
Scripts	
Open in Microsoft CRM: Open webpage http://MyServer/Database1/main.aspx?etc=1id=\$(AccountId)pagetype=entityrecord	
Back Finish Cance	1