

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 '[skype:](#)' 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).

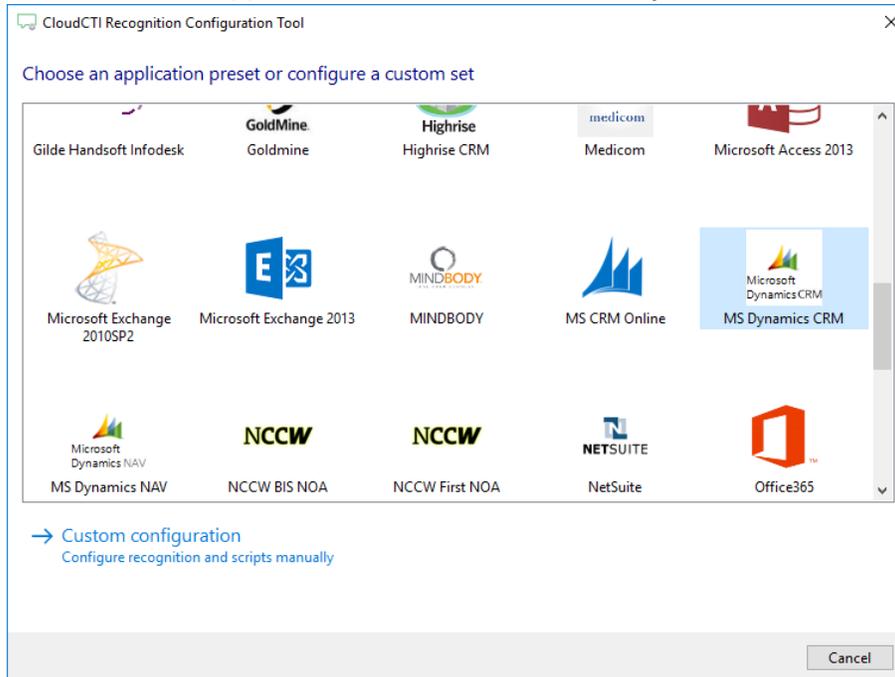
Summary

ACCOUNT INFORMATION

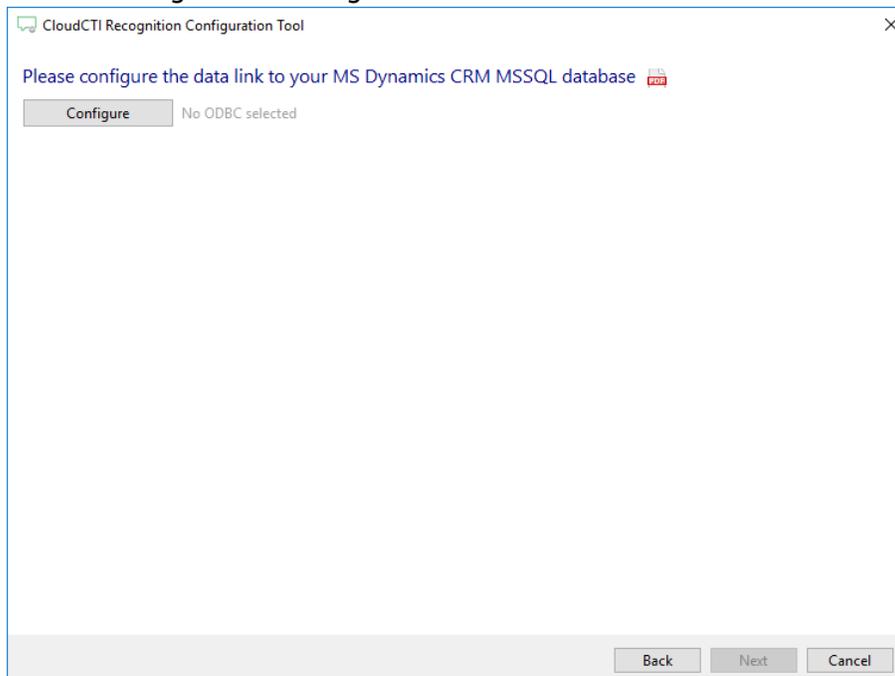
Account Name *	A. Datum Corporation (sample)
Phone	555-0198
Fax	--
Website	http://www.adatum.com/
Parent Account	--
Ticker Symbol	--

Configuration steps

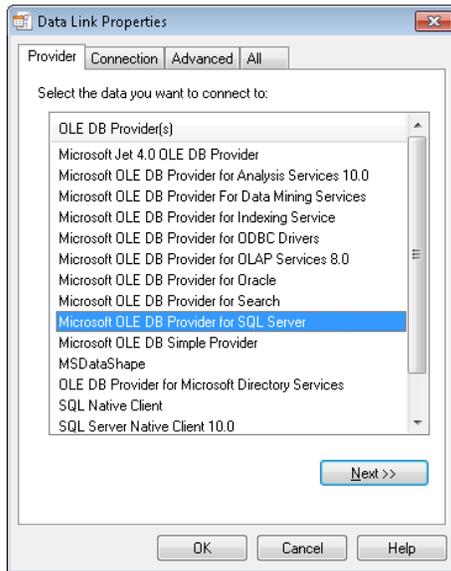
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#)
From the list of applications, choose 'Microsoft Dynamics CRM', as shown below



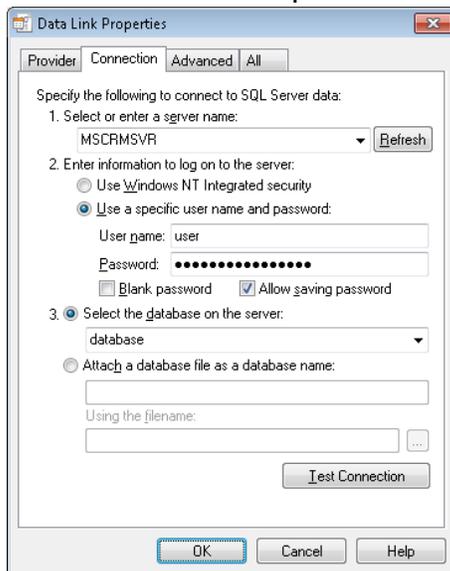
- 2) Press "Configure" to configure the ODBC connection.



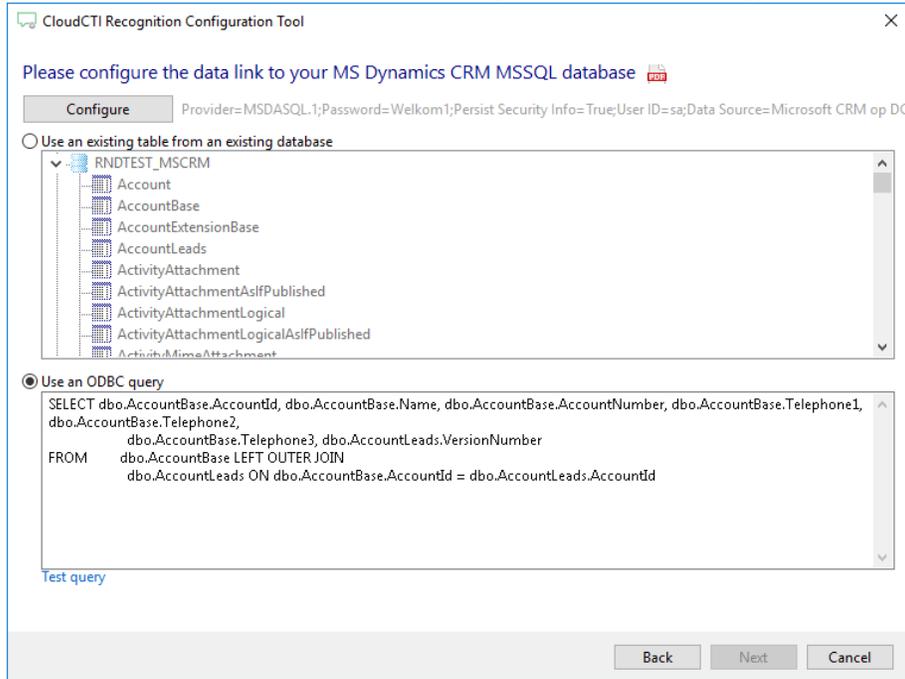
- 3) Select “Microsoft OLE DB Provider for SQL Server” and press “Next >>”



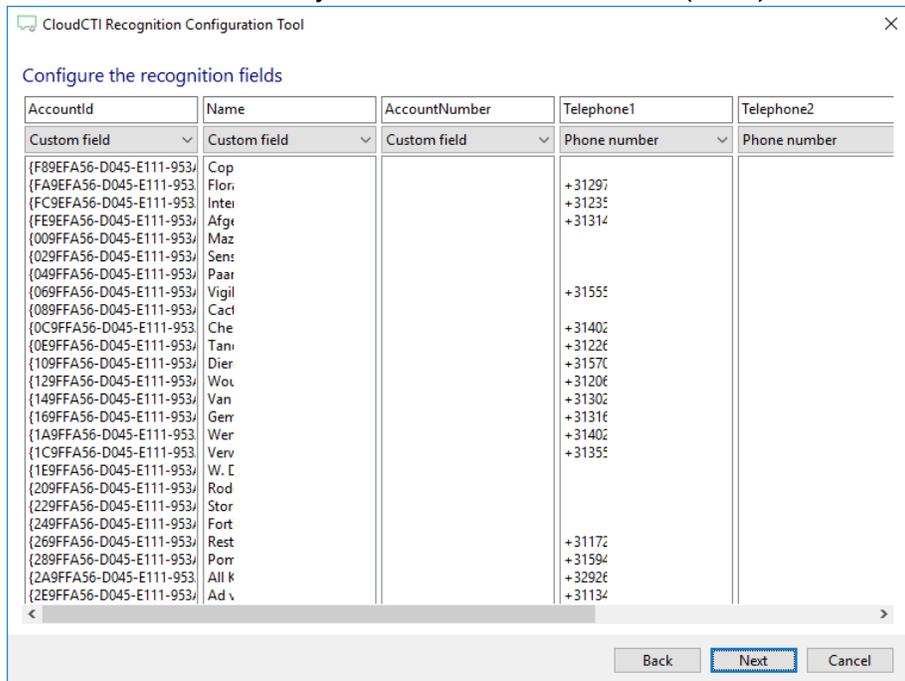
- 4) Fill in the server name, credentials and select the Microsoft Dynamics CRM database. Check the option “Allow saving password”



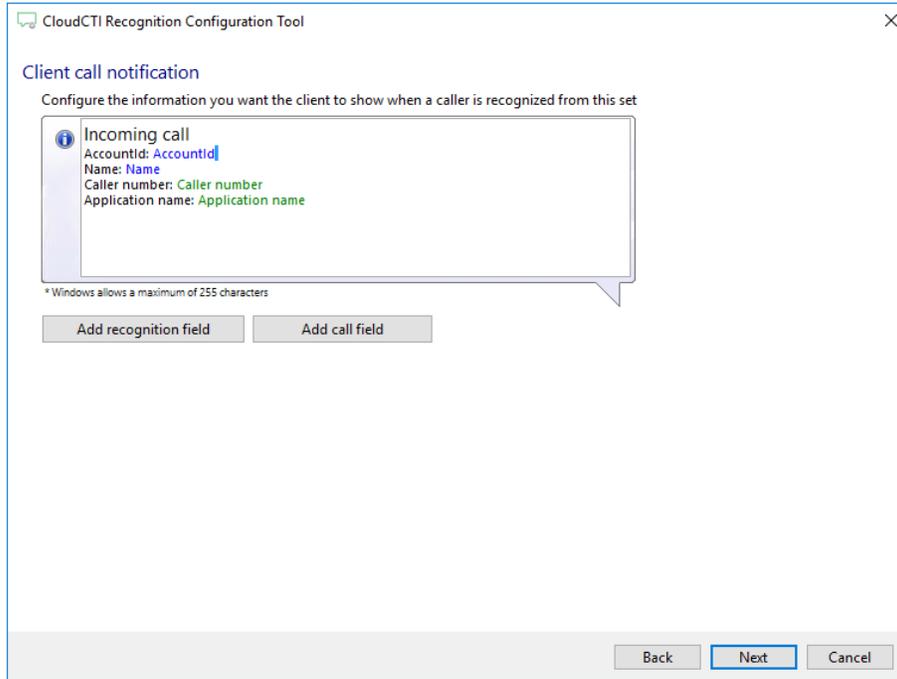
5) Select a table, view or use a custom query to obtain recognition data



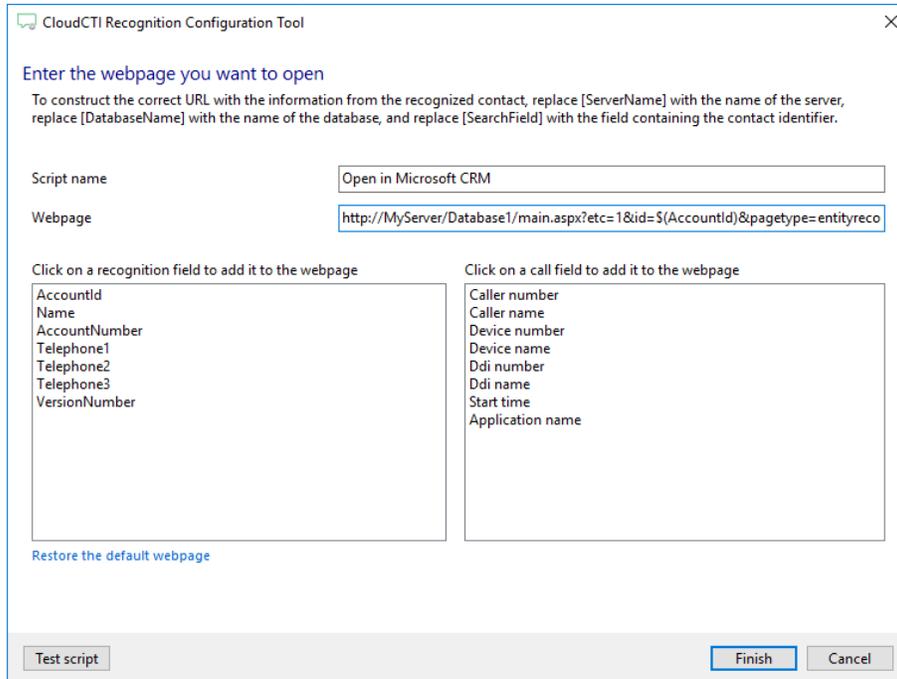
6) The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue. Make sure you add an Account ID field (UUID) to use for application pop up



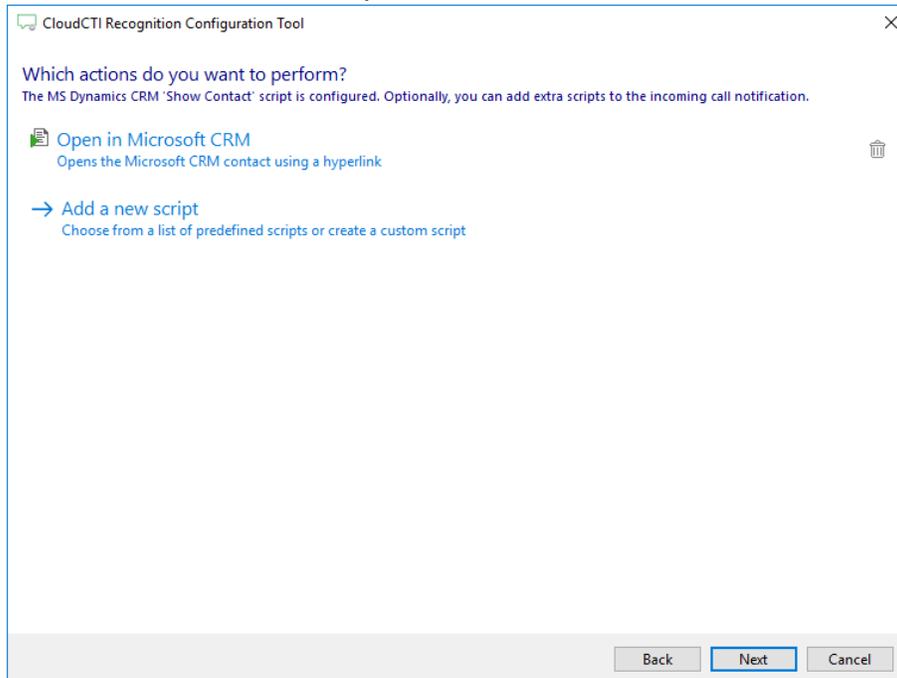
7) Choose which fields to display in the call notification on an incoming call.



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



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



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

