

CRM-TAPI-Schnittstelle

CRM TAPI Interface 2016

User manual

CRM TAPI Interface Version 8.1.6 - for MS CRM 2016

TAPI-Connector Version 8.1.6 – TAPI-Manager Version 8.1.6 – TAPI-Solution Version 8.1.6 TAPI-Notifier Version 8.1.6

Version 8.1.6

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1 Preface

Thank you for choosing our CRM TAPI interface.

The CRM TAPI interface for Microsoft Dynamics CRM supports your every day telephone activities in Microsoft Dynamics CRM and therefore makes your daily work easier.

The CRM TAPI interface is an integrated application, providing the user with telephone functions for incoming and outgoing calls in Microsoft Dynamics CRM. The telephone conversations are fully embedded in the activity management as well as in the contact form of Microsoft Dynamics CRM. Calls can be started directly from all entities.

In this user manual, you will find instructions on how to make calls off any entities and fields. Using the CRM TAPI interface within any client environment (e.g. terminal server) without installing a client is an important configuration property of this interface.

This interface is an add-on for Microsoft Dynmanics CRM 2016.

On the following pages, you will find a detailed user manual

2 The TAPI-line (user record)

If the installation is carried out in the correct order (importing the solution, installing the TAPI-manager, installing the TAPI-connector), the TAPI-connector will start automatically after the installation, connect itself to the telephone system and transfers the information of the active TAPI-lines to the TAPI-manager. The TAPI-manager connects with the CRM and shares the corresponding line information. This information will automatically create records with the following hierarchy:

- Standard record
- Location record and
- TAPI-lines (user records)

The configuration of the standard and location record can only be carried out by the user with the role "Tapilnterface Admin". The entries of the standard record are inherited to the location record. If the entries in the location record are not changed or not filled, the entries of the standard record are taken over into the TAPI-line.

The user with the "TapiInterface Admin" role should assign the single users with the rights of their own TAPI-line, in order to be, as user with the "TapiInterface User" role, able to set individual settings of his/her TAPI-line according to own demands.

The user with the "TapiInterface User" role will find the user record in the "settings" menu, in the sitemap subsection "Donaubauer AG" and there in the "TAPI interfaces" entity.

Multiple TAPI-lines can be assigned to one TAPI user. This user can receive incoming calls of multiple TAPI-lines. (Feature: multiple TAPI-lines per user)

For every located TAPI-line a TAPI-line record is generated in the CRM. Therefore, large companies have a large number of entries. If the user with the "TAPIInterface Admin" role assigned every user with rights of his/her own TAPI-line, every user can easily find the corresponding record by using the search function.



Alla N	Aicrosoft Dynamics CRM 🗸 👘 🕴 EINST	Tellungen 🗸	Tapi Schnittstellen 🛛 🗸				
+	NEU 🏛 LÖSCHEN 🔻 🗋 LINK KOPIEREN 🔻	യ LINK PER E-M	AIL SENDEN 🛛 👻 🚺 BERICHT AUSFÜHREN 🔻	EXPORTIEREN NACH EXC	el 🛛 🕞 daten importieri	EN 🔻	
-	Aktive Tapi Schnittstelle •						
~	Tapi Name 🛧	Тарі Тур	Tapi Line	Tapi Benutzer	Übergeordneter Datensatz	Besitzer	Erstellt am
	Standard	Standard				SYSTEM	31.03.2014 16:50
	Standort	Standort			Standard	SYSTEM	31.03.2014 16:50
	tapiconnector.chd.de:11	Benutzer	tapiconnector.chd.de:11		Standort	SYSTEM	04.04.2014 13:24

In order to configure individual settings the user record has to be opened by the user.

2.1 General information

The section "General information" already contains all necessary information, saved automatically by the system or the user with the "TapiInterface Admin" role. This information is in particular:

Allgomoin					
Tapi Name * Tapi Line Tapi Benutzer	hicom.abc.de:25 hicom.abc.de:25 🍰 Max Mustermann		Besitzer *	🌡 SYSTEM	
Typ und Angabe des üt	oergeordneten Datensatzes (Star	dard, Standort Datensatz)			
Тарі Тур * 🛛 🔒	Benutzer		Übergeordneter Date	Standort	
Tapi Name:	is set automat - server name - colon - name of the For instance: h This name car name)	cally after successful ir on which the TAPI-Cor FAPI-Line nicom.abc.de:25 n be changed if necess	nstallation. It is com nnector was installe ary in order to bette	posed of: d r align the user re	cord (e.g. user
Tapi Line:	is set automat generated TAI The name of t	cally after successful ir l name (see above). ne TAPI-Line cannot be	nstallation, same na e changed.	me as the automa	atically
Tapi user:	has to be aligr	ed to the TAPI-user wh	no uses this TAPI-Li	ine.	
Owner:	should corresp up functions e	ond with the TAPI use	r in order so individu	ually configure the	e settings (pop-
TAPI type:	is set to "user"	when generated and c	annot be changed.		
Parent record:		is compulsory set to ' changed.	location", is genera	ted automatically	and cannot be

When the user with the "TapiInterface Admin" role manually creates a user record, the fields "TAPI line"; "TAPI type" and "parent record" can only be altered while creating the record. When a mistake was made during manually creating the record, please delete the record and re-create it. Manuallay entering a TAPIline is only necessary for the feature "one TAPI-line for multiple users".

2.2 General Popup settings

Every telephone call opens a <u>popup window</u> next to the activity "telephone call". This popup window can be customized in the general popup settings.

Allgemeine Popup Ein	stellungen		
Anzeigedauer (s)	30	Telefonanruf öffnen	bei keinem oder einem Treffer
Popup Position		Maximale Treffer	
Popup Breite		Popup Höhe	
Telefonanruf und Da	**	Telefonanruf erst bei	

The following settings can be made:

Anzeigedauer:

How long should the popup window be displayed on the screen? The entered value has to be made in seconds. The default setting when creating the user record is 30 seconds.

Open telephone call:

This popup window can open the activity "telephone call" automatically for every telephone call. There are the following markings:

bei keinem oder einem Treffer
nur bei einem Treffer
bei mindestens einem Treffer
immer
nie

No or one match

(a match is finding a telephone number saved in the CRM)

- The activity "telephone call" is opened for every incoming call, if <u>one</u> or no saved telephone number (count zero or count one) was found in the CRM.
 - If a telephone number is found, the corresponding pre-set entries will be made in the "telephone call" activity.
 - If no telephone number is found, there are no pre-set entries

Only one match

- The "telephone call" activity will only be opened, if <u>one</u> saved telephone number is found in the CRM.
 - In this case, the "telephone call" activity has the corresponding pre-entries.

At least one match

The "telephone call" activity will be opened for all calls with a telephone number in the CRM. If only one telephone number is found, the activity "telephone call" with the corresponding preentries will be opened.

For multiple matches the "telephone call" activity opens without pre-entries.

Always

- The "telephone call" activity is opened for every call.
 - If only one match is found, the "telephone call" activity will be opened with the pre-entries. If no or multiple matches are found, the "telephone call" activity opens without pre-entries

Never

- The activity "telephone call" will not be opened.

Popup position:

With this set of options, the user can define on which position of the screen the popup window appears. When working with multiple screens, the popup window of the CRM TAPI interface appears on the same screen as the current Microsoft Dynamics CRM.

echts unten	
nks unten	
nks oben	
echts oben	

Maximum number of matches:

In many companies, telephony is managed by a central body. It could happen that both the company record as well as the corresponding user records contains the same telephone number.

In this setting, the user can configure how many matches are shown in the popup window. They are listed in the following hierarchy:

- Company
- Contacts
- Lead
- User

This process terminates as soon as the maximum number of matches is reached. The list is displayed in the hierarchy stated above sporadically without sorting.

The default value after the installation is set to 5. The value of the maximum number of matches is not limited

Width and height of the popup window:

The size of the popup window can be set individually. The values are set in pixels. The default value after the installation is set to width: 250 pixels and height 100 pixels).

There are several options to combine the opening of the popup window with the activity "telephone call".

Open telephone call and record together:

The popup window opens for incoming calls. When a record (company, contact, lead, and user) with the telephone number is found in the CRM, this record (company, contact, lead, and user) can be opened directly with the link in the popup window.

If the value is set to "Yes", the "telephone call" activity will be opened whilst opening the found record. If the value is set to "No", the record will be opened without the telephone activity.

Open telephone call only upon call setup:

If this value is set to "Yes", the telephone call will not be opened until the call is connected (caller and called party can speak to each other).

That means that if the called party does not pick up the phone, because they are not sitting at their desks, the "telephone activity" will not be opened.

This feature is intended for TAPI users who often need to leave their desks due to workflow processes.

2.3 Settings for opening TAPI protocolls

If the user does not want to generate <u>TAPI protocols</u> and/or popup windows for certain telephone numbers, the corresponding telephone numbers can be entered in the intended space as follows

Keine Tapi Protokoll Inf	ormation speichern und kein Popup Fenster bei folgenden Telefonnummern (z.B. 200-300, 330)
Kein Protokoll	
Kein Ponun Fenster	
Ken ropup renster	

Save no TAPI protocol information and not show popup window for the following telephone numbers:

No protocol:

Here, enter the telephone numbers for which no record should be generated in the "TAPI protocols" entity (e.g. internal telephone numbers). The single numbers are separated by a comma; complete sequences can be joint by hyphen without spaces. Example: 11-19

No popup window:

Here, enter the telephone numbers for which no popup window is necessary (e.g. internal telephone numbers). The single numbers are separated by a comma; complete sequences can be joint by hyphen without spaces.

Example: 11-19

2.4 Fuzzy search

off

When receiving an incoming call, all records of the CRM system are checked for the complete telephone number. If the complete telephone number is found (match), it will be displayed. If the complete telephone number is not found, only the telephone number of the incoming call will be displayed in the popup window.

If the feature "fuzzy search" is activated, the user record will automatically be extended by the field search algorithm.

Unscharfe Suche	
Unscharfe Suche	Ja
Suchalgorithmus	

The search algorithm can be configured according to your requirements.

Example:

on:

Level 1

For an incoming call, the complete telephone number is searched for (e.g. 0987654321). If this number is not found, the search will be continued in further levels, meaning it is searched for parts of the incoming telephone number.

Level 2

The zeros at the beginning of the telephone number are cut, instead a wildcard (like) is entered Example: Search for "*987654321"

<u>Configuration in the field "Search algorithm":</u> replace(^0+,); search(endwith); onresult(break)

(this configuration only cuts the first digit): replace(^\d,); search(endwith); onresult(break))

Level 3

The telephone number is cut by the two digits at the beginning, instead a wildcard (like) is entered. Example: Search for "*87654321"

<u>Configuration in the field "Search algorithm":</u> <u>replace(^\d{2},); search(endwith); onresult(break)</u>

Level 4

The telephone number is cut by 3 digits at the end, instead a wildcard (like) is entered at the end of the telephone number.

Example: Search for "0987654*"

<u>Configuration in the field "Search algorithm":</u> replace(\d{3}\$,); search(startwith); onresult(break)

Level 5

The telephone number is cut by one digit at the beginning and by 3 digits at the end, instead a wildcard (like) is entered at the beginning and at the end. Example: "*987654*"

<u>Configuration in the field "Search algorithm":</u> replace(^\d,); replace(\d{3}\$,); search(contains); onresult(break)

If a match is found in one level, the search in the following levels will not be carried out. The default value for found matches is 5, but depends on the configuration in the section "<u>Maximum</u> <u>number of matches</u>".

2.5 TAPI sharing

Here, it can be checked which other TAPI-lines are shared with the current user. TAPI-lines can also be shared within teams. If the current TAPI user is aligned to one of these teams, this information will be displayed in this section.

The sharing is documented as follows: Example:

▲ Tapi Freigaben		
Benutzer/Team	Freigegebene Tapilines	Benutzer
Schräber, Silke	hicom.abc.de:25	Schräber, Sike
	hicom.abc.de:66	Mustermann, Max
	hicom.abc.de:41	

 Column 1:
 Name of the current TAPI user or name of the team to which to current TAPI user is aligned to.

 Column 2:
 Name of the shared TAPI-line

Column 3: Name of other users, who also share this TAPI-line

▲ Tapi Freigaben			
Benutzer/Team	Freigegebene Tapilines	Benutzer	
Team ABC	hicom.abc.de:49	Schräber, Silke	
Mustermann, Max		Mustermann, Marie	
		Tester, Tobias	
		Sample, Sam	

Column 1 states whether the TAPI-line is shared within a team. The second column lists the TAPI-lines which are used. Column 3 lists all users that are aligned with the team.

2.6 General configuration of the prefix of the company's telephone numbers

The user record does not specify any entries. The required information is passed on from the parent record (location record), or – if this record is empty – from the default record

Allgemeine Konfiguration der gesamten Vorwahl der Firmentelefonnummer					
Auslandsvorwahl	Inlandsvorwahl				
Landeskennzahl	Einwahlnummer				
Konfiguration für ausgehende Rufe					
Amtsvorwahl	Vorwahl				
Konfiguration für eingehende Rufe und Angabe der maximalen Länge der internen Nummer					
Richtungskennzahl	Länge interne Numm				

3 Using the CRM TAPI interface

3.1 The user interface

After installing the CRM TAPI interface, a new icon for telephony can be seen in the menu bar next to the user name.

1

With this icon, the telephone functions can be enabled and disabled.

Only CRM users, who were aligned with a TAPI-line, have a green telephony icon. For CRM users without an aligned TAPI-line, the color of the arrow is red.



3.2 The telephone icon

3.2.1 Quick relocation with the telephone icon

Please note: This function is only helpful for TAPI users with one TAPI-line.

In order to enable users or team to work with the CRM TAPI interface from other locations, the TAPI-lines have to be <u>shared</u> with the TAPI users. The user with the "TapiInterfaceAdmin" role has the rights to carry out this process. This is the standard CRM function for sharing records.

Carry out the quick relocation as follows:

By clicking the telephony icon with the left mouse button, a window appears, listing the current user's shared TAPI-lines.



If the user has only one TAPI-line, meaning no additional TAPI-lines were shared, the window will open as follows



By single-clicking the left mouse button on one of the given TAPI-lines, the user can change the location immediately.

Now, the TAPI user can use any other telephone (e.g. in a conference room) with the TAPI-line just as at his/her own desk. The complete functionality of the CRM TAPI interface is available to the fullest extent. In order to redirect the calls to another telephone and log them, please proceed as follows:

The telephone will be switched to the chosen device. This must be a telephone with an aligned TAPI line; additionally, this TAPI line must be shared with this certain user. Now, proceed with the quick relocation as described above.

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Example:

TAPI user of the TAPI line "hicom.abc:25" is Ms. Silke Schräber.

This TAPI user is also aligned with the TAPI line 66. Manually switch from TAPI line 25 to line 66 by clicking the TAPI icon in the menu bar with the left mouse button and select the TAPI line 66. The arrow in the menu bar turns red temporarily, since the TAPI connection will be disconnected and the new line has not been connected yet. As soon as the TAPI connector connects the TAPI line, the arrow will turn green and the tool tip shows: TAPI line 66 was licensed and connected by the TAPI connector. Now, incoming calls for the TAPI line "hicom.abc:25" will be redirected to line "hicom.abc:66", the TAPI protocol logs this call for the TAPI line "hicom.abc:66" as usual.

Logging calls when using a mobile phone or a telephone without TAPI line does not work.

As soon as the TAPI user returns to his/her own workplace, the settings have to be undone, or telephone calls will not be logged.

Only the user with the "TapiInterface Admin" role can share additional TAPI lines.

3.2.2 Further functions of the TAPI icon

By clicking the icon with the right mouse button, a sub-menu appears:



My TAPI protocols:

With one-click, the user directly gets to his/her own "My TAPI protocols" view.

Telephony monitoring on:

The CRM TAPI interface with all its functions can be activated.

Telephony monitoring off:

The CRM TAPI interface gets deactivated and, therefore, cannot be used. When clicking this button, the telephone icon will turn red, with the arrow pointing down:

Change telephony settings:

With one-click on this button, the active user gets to his/her own user record and can change it, if necessary.

3.3 Records in the CRM

The single entities and corresponding fields are configured by the user with the "TapiInterface Admin" role according to the company's guidelines. In order to demonstrate the functions of the CRM TAPI interface, our example uses a contact record for which all fields necessary for telephony were pre-configured.

Contact record:

KONTAKTINFORMATIONEN		
Vollständiger Nam	Tester, Frank	
Position		
Firmenname		
E-Mail	lizenzen@donaubauer.com	
Telefon (geschäftlich)		C
Mobiltelefon		C
Telefon (privat)		C
Fax		
Pager		C

Telephone buttons were added behind the accordingly configured fields.

Activity "Telephone call":

telefonanrui Neu: T	elefonanruf			Vertrieb Nein
Betreff [*] Bezug Anrufender [*] Angerufener [*]	 @ Tester, Frank Donaubauer AG	Richtung Telefonnummer	Eingehend 01234567890	14 X
Startdatum Beschreibung	18.09.2015 16:07	Fällig	18.09.2015 16:08	

With these buttons in the "telephone call" activity, the CRM TAPI interface can be used.

For users without an aligned TAPI line, the telephone icons are **not** shown in the records.

3.4 Using the telephony functionality

For using the telephone functionality for your daily work with Microsoft Dynamics CRM, the CRM TAPI interface has to be activated.

After starting Microsoft Dynamics CRM, the arrow of CRM TAPI interface icon in the menu bar should be green.



If this arrow is red you possibly have to manually activate "telephony monitoring" with right mouse click on the icon.

If the icon does not turn green or turns yellow, there is an error.

In this case, please contact your CRM system administrator. Detailed information on troubleshooting can be found in the installation and configuration manual in the section "fault diagnosis".

For the complete functionality of the CRM TAPI interface, the following fields are necessary in the telephone call form:

- directioncode (direction)
- from (caller)
- to (called party)
- phonenumber (telephone number),
- optional: telephone time fields for begin, end and duration of the call (these fields are set in the configuration)

3.4.1 Outgoing telephone calls

To make a phone call, please open the corresponding entity (e.g. company record). If the current TAPI user is aligned with multiple TAPI lines, the outgoing call will be made by the current

TAPI line. This is set in the "current TAPI line" field in the "Configuration for outgoing calls" area in the TAPI user record.

Konfiguration für ausgehende Rufe				
Amtsvorwahl				
aktuelle Tapiline	Ja			

The selected entity contains one or more telephone numbers. For instance, the "contact" entity may include the office phone number, the private phone number as well as mobile number, and an additional phone number in the section "pager". Select the appropriate number be clicking the telephone button behind the number.

The window for the "telephone call" activity opens immediately. The following fields are pre-set:

- caller (from)
- called party (to)
- called telephone number and
- direction (outgoing)

After this configuration and if the fields are activated in the "telephone call" form, the information for the actual beginning of the call (starting date, consisting of current date and time) are automatically inserted in the "telephone call" activity as soon as the called party answers the call.

During the call, the user can easily document the information of the call (subject and content of the call), and no important information will be lost.

After ending the call, the actual end with current date and time gets entered in the "telephone call" activity, provided that the activity is configured correspondingly and the fields in the "telephone call" are activated. The duration of the call be listed as well.

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If the caller is not available, the call can be canceled by clicking the button with the red arrow in the "telephone call" form.



If the call should be repeated at a later time, leave the window open and press the green button for the connection at any given time.



After a possible check of the call's content, the activity can be linked to the corresponding entity, saved and closed.

After closing the call, it can be found in the linked entity (e.g. opportunity or query) in the "closed activity" section. It is no longer possible to change or adjust the content or link it to another entity.

3.4.2 Incoming calls

3.4.2.1 The popup window

The configuration of the popup window is described in the section General popup settings.

We assume that for every incoming call a popup window appears. This window already shows the following information:

Telefonnummer des Anrufenden (auch interne Nummern)				Datum und Uhrzeit des Anrufes
	🖉 CRM Tapi Schnittste	lle	×	6
_	0123456789	12.06.2015	14:30	
	Schräber, Silke (Donau	bauer AG)		
7	Donaubauer AG			
Name des Anrufer,	Tapiline:123		Nr: 98	7
sofern ein Datensatz im CRM				`\
für diesen erstellt				
ist. Ist die gleiche				Die Telefon Line
Firma und Kontakt				die angerufen wird
hinterlegt, werden				auch intern
hier mehrere Treffer angezeigt				
inener angezeigt				

When a contact record with the incoming phone number is found, the parent company record is written behind the contact's name in brackets.

If for the setting "Open telephone call and record together from popup" the user selected "Yes", a single mouse click on the found (linked) match will open both the record (company, contact, lead) as well as the activity "telephone call" at the same time.

If the user selected "No" for this setting, the single mouse click will only open the record (company, contact, lead).

The "telephone call" activity can be opened by double clicking the row of the match (not the linked name).

If the caller does not exist in the system, an empty popup window with the telephone number and the telephone icon will be displayed.

If the caller does not exist in the system and hides his/her phone number, an empty popup window without number and without telephone icon will be displayed.

3.4.2.2 The "telephone call" activity for incoming calls

Together with the popup window, the "telephone call" activity opens.

Neu: Te	elefonanruf			
Telefonanrut	f			
Anrufen von *	Testfirma 2	Telefonnummer	45	44 🗶
Anrufen *	Der Tester	Richtung	Eingehend	
Betreff*				
_				
Bezug				

When the caller was found in the CRM system (match) and the phone number was clearly allocated, the field caller (from), called party (to) and the actual begin (date and time exactly to the minute)of the call are pre-set in the opening activity "telephone call, provided that these fields exist on the "telephone call" form.

If the caller is not saved in your CRM system, both the popup and the call's window will display resp. enter the phone number.

If the caller configured his/her telephone system to not transmit the phone number, the popup will read "private number".

By double clicking the corresponding row the "telephone call" activity opens. The information about the caller (from) and the phone number are not filled in.

3.4.2.3 Protocolling the call

The content of the incoming call can be logged immediately. Just as for outgoing calls, date and time of the call are automatically entered after ending the call, provided that these fields exist in your telephone call form. Now, the call only has to be referred to the corresponding entity and be closed.

You saved a company and multiple contacts for the company to your CRM system. For all contacts the phone number of the company's headquarter was entered. When one of these contacts call, the popup window opens and lists all possible entities; in our case: the company and all contacts. If there are more than three matches, the window will show a scroll bar on the right to show the other matches. You can also configure the size of the popup window in order to show all matches. The "telephone call" activitiy does not open.

After taking the call and clearly allocating the caller to a match, you can manually create the "telephone call" activity by double clicking the row of the identified person. The "telephone call" activity is entered with the pre-set entries of the caller.

3.5 Tapi protocols

The entity "Tapi protocols" logs all incoming and outgoing calls as well as missed calls.

+	→ Meine Tapi Protokolle -							Nach	Daten:
\checkmark	Nummer	Tapi Line	Interne Nu	Beginn des Anrufs 🛧 🛛	Verbindungsaufbau	Verbindungsende	Gesprächsz	Gesprächsri	
	51	hicom.abc:25	28	05.08.2015 16:02	05.08.2015 16:02	05.08.2015 16:13	10 Minuten	Eingehend	
	03	hicom.abc:25	10	05.08.2015 16:01	05.08.2015 16:02	05.08.2015 16:02	0 Minuten	Eingehend	
	02	hicom.abc:25	10	05.08.2015 15:57	05.08.2015 16:00	05.08.2015 16:00	0 Minuten	Eingehend	
		hicom.abc:25	10	05.08.2015 15:18	05.08.2015 15:21	05.08.2015 15:23	1 Minute	Eingehend	
	07	hicom.abc:25	10	05.08.2015 14:47	05.08.2015 14:48	05.08.2015 14:50	2 Minuten	Eingehend	
	03	hicom.abc:25	10	05.08.2015 14:24	05.08.2015 14:24	05.08.2015 14:25	0 Minuten	Eingehend	
	02	hicom.abc:25	10	05.08.2015 14:15		05.08.2015 14:15	0 Minuten	Eingehend	
	03	hicom.abc:25	10	05.08.2015 13:54	05.08.2015 13:55	05.08.2015 13:56	1 Minute	Eingehend	
	03	hicom.abc:25	10	05.08.2015 11:39		05.08.2015 11:39	0 Minuten	Eingehend	
	03	hicom.abc:25	10	05.08.2015 11:21	05.08.2015 11:23	05.08.2015 11:23	0 Minuten	Eingehend	
	03	hicom.abc:25	10	05.08.2015 10:35	05.08.2015 10:35	05.08.2015 10:37	1 Minute	Eingehend	
	08	hicom.abc:25	28	05.08.2015 09:50	05.08.2015 09:50	05.08.2015 09:54	3 Minuten	Ausgehend	
	03	hicom.abc:25	10	05.08.2015 09:41	05.08.2015 09:42	05.08.2015 09:43	0 Minuten	Eingehend	

When a call cannot be taken, with the help of the TAPI protocol and its inverse search the caller can be identified and called back.

3.6 The inverse search

The inverse search simulates an incoming call. It can be used directly from the TAPI protocol. Simply select the respective record and click the button "inverse search" in the menu bar.

+	NEU 💉 BEARBEI	ten 🗸 aktivieren 🗋 deaktivieren	🛅 LÖSCHEN 🛛 👻 🗳	🛎 ZUWEISEN 🛛 🗘 FREIGE	BEN	•••		
						🗋 Link kopieren 🛛 🕨 🕨		
-	Meine Ta	api Protokolle 🖌				🖘 Link per E-Mail senden 🔰 🕨	:hen	
						👶 Workflow ausführen		
~	Nummer	Tapi Line	Interne Nu	Beginn des Anrufs 🛧 🛛 Ve	erbindur	Dialog starten	Gesprächsz	Gesprächsri
\sim	45	tapiconnector.chd.de:40	40	06.08.2014 13:21	06.	Bericht ausführen	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 11:39			0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 11:38		Exportieren nach Excel	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 11:37		Daten importieren	0 Minuten	Fingehend
						Erweiterte Suche		en genero
	45	tapiconnector.chd.de:40	40	06.08.2014 11:20		inverse Suche	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 11:19		Diagrammbereich	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 10:43		唱 Ansicht	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 10:38		👍 Neue Systemansicht	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 10:28		🛓 Entität anpassen	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 10:23		🔯 Systemansichten	0 Minuten	Eingehend
	45	tapiconnector.chd.de:40	40	06.08.2014 10:18	06.0	8.2014 10:18 06.08.2014 10:18	0 Minuten	Eingehend

The TAPI popup window opens just as for an incoming call. If the corresponding telephone number is found in a CRM record, all information of the call and functions described earlier will be available. Therefore, missed calls can be traced and customers can be called easy and in a timely manner.

TAPI PROTOKOLL : IN 514	NFORMATIONEN		
Allgemein Nummer * Interne Nummer Gesprächsrichtung	514 40 Eingehend	@	
Verbindungszeiten			
Beginn des Anrufs Verbindungsaufbau	17.06.2014 11:09 17.06.2014 11:09	 Verbindungsende Gesprächszeit 	17.06.2014 11:13 4 Minuten

This process can also be made out of the TAPI protocol record.

3.7 Ther TAPI Notifier

For monitoring incoming calls independently from web clients you can use the TAPI Notifier. This connects with the TAPI manager just as the web client.

The TAPI Notifier consists of an application file and several DLL files and only has to be started on the client computer, or be started by the auto start function of the client computer (no installation).

An incoming call indicated by a popup as for the web client. For this, an internet explorer on the client computer of the TAPI user has to be installed.

🚖 CRM TAPI Schnitt 💻 🗖	¢
034362826547 08.06.2016 11:	58
🖻 <u>Testfirma 2</u>	~
Hans Meier (ABC Firma)	
Eqon Olsen	Ť
Tapiline: tapiconnector.chd.de:45 N	r. 45

Please note:

- If the TAPI Notifier is active, an already existing web client will be logged off. The TAPI icon in the web client will be red.
- If the TAPI Notfier is active, the web client will not be automatically logged on when starting the CRM
- Manually activating the web client will log off an already logged on TAPI Notifier.
- The TAPI user must have the rights "prvReadUserSettings" and "prvReadWebResource"

3.7.1 Saving the CRM configuration to the Active Directory

The default values for the CRM server and the organization can be saved to the Active Directory.

For this, the domain administrator creates a new service container with the ADSI Editior, the service container is named CrmTapiNotifier. The attribute adminDescription saves the name of the CRM server and the attribute adminDisplayName saves the name of the organization.





Selecting the class of the new object

Create Object	x
Select a class:	
applicationEntity applicationVersion certificationAuthority classStore comConnectionPoint contact container	
<pre>control∆cressRinht </pre>	



	Create Object X
Attributer	_
Attribute:	cn
Syntax:	Unicode String
Description:	Common-Name
<u>V</u> alue:	CrmTapiNotifier
	< <u>B</u> ack <u>N</u> ext > Cancel Help

The name of the container is CrmTapiNotifier

Setting the attributes adminDescription and adminDisplayName

Create Object	x
To complete the creation of this object, click Finish.	
To set more attributes, click More Attributes.	
	_
< <u>B</u> ack Finish Cancel Help	



Attribute for the Crm-Server (adminDescription)

	cn=Crm	TapiNotifier	x
Attributes			
<u>P</u> ath: C <u>l</u> ass: contain	er		
Select <u>w</u> hich p	properties to view:	Optional V	
Select a prope	erty to <u>v</u> iew:	adminDescription V	
Attribute Value	s		
Synta <u>x</u> :	DirectoryString		
<u>E</u> dit Attribute:	https://cmserver	.domain.local	
V <u>a</u> lue(s):	<not set=""></not>		
		<u>S</u> et <u>C</u> lear	
		OK Cancel	

Attribute for the CRM organization (adminDisplayName)

	cn=Crm	TapiNotifier	x
Attributes			
<u>P</u> ath: C <u>l</u> ass: contain Select which p	er vroperties to view:	Optional	
Select a prope	erty to <u>v</u> iew:	adminDisplayName v	
Synta <u>x</u> :	DirectoryString		
Edit Attribute:	CRM		
V <u>a</u> lue(s):	<not set=""></not>		
		<u>S</u> et	
		OK Cancel	

Now, the Active Directory lists the Service CrmTapiNotifier

周日	Active Director	y Sites and Servio	ces	_ D X				
<u>F</u> ile <u>A</u> ction <u>V</u> iew <u>H</u> elp								
🗢 🄿 🖄 📰 🗶 🗎 🙆								
 Active Directory Sites and Servic Sites Inter-Site Transports Subnets Wurzener-10 Services AuthN Policy Configurat Claims Configuration 	Name	Type There are no items						
	1							

Via "properties", the values can be changed in the attribute editor.

Active Di	irectory Sites and Servic	es	_ D X					
File Action View Help								
Active Directory Sites and Servic Sites Services AuthN Policy Configurat Claims Configuration CrmTapiNoti Group Key Di Group Key Di Microsoft SPI Microsoft SPI M	Type There are no items t	Description						
Properties								
Help								
< III >								
Opens the properties dialog box for the current selection.								



CrmT	TapiNotifier Properties ? ×							
General Object Security Attribute Editor								
Attri <u>b</u> utes:								
Attribute	Value							
adminDescription	https://test.crm8.chd.de							
adminDisplayName	Test ≡							
cn	CrmTapiNotifier							
defaultClassStore	<not set=""></not>							
description	<not set=""></not>							
displayName	<not set=""></not>							
displayNamePrintable	<not set=""></not>							
distinguishedName	CN=CrmTapiNotifier,CN=Services,CN=Config							
dSASignature	<not set=""></not>							
dSCorePropagationD	0x0 = ()							
extensionName	<not set=""></not>							
flags	<not set=""></not>							
fSMORoleOwner	<not set=""></not>							
instanceType	0x4 = (WRITE)							
<	>							
<u>E</u> dit <u>F</u> ilter								
ОК	Cancel Apply Help							

3.7.2 Configuration of the TAPI Notifier

For the initial start of the TAPI Notifier, please transmit the login information. This information can be saved to the Windows vault.

erbindung mit Microsoft Dynamics CRM herstellen			
Microsof	t Dynamics CRM	-	
Domain\Benutzemame: Kennwort:			
	Kennwort speichem und Verbindung automatisch herstellen		
	OK Abbrech	ien	

If the connection data to the CRM differ from the global settings in the Active Directory, they can be saved locally in the current user's registry.

When starting the TAPI Notifier the registry is read first. If there is no entry, the global settings in the Active Directory will be used.

Thereto, the context menu of the TAPI icon has the button "edit configuration".

Tele	efonie-Überwachung ein	
Tele	efonie-Überwachung aus	
Tele	ne Tapi-Protokolle efonie-Einstellungen	
Kon	figuration bearbeiten	
Tele	tome-obelwachung beenden	
😤 Konfi	iguration bearbeiten	>
Organisat	tion CRM	

Speichem

Abbrechen



3.7.3 Using the TAPI Notifier



The TAPI icon appears in the information bar bottom right.

- Green: telephony monitoring is active
- Yellow: The TAPI line of the TAPI user was not logged in or licensed by the TAPI Connector
- Red: telephony monitoring is not active (or error, see log information)

A right click on the TAPI icon opens a context menu for using the TAPI Notifier.

Telefonie-Überwachung ein
Telefonie-Überwachung aus
Telefonie-Überwachung Log
Meine Tapi-Protokolle
Telefonie-Einstellungen
Konfiguration bearbeiten
Telefonie-Überwachung beenden

Telephony monitoring on/off
 For turning the telephony monitoring on or off.
 If the telephony monitoring is turned off, the TAPI icon will appear red.

- Telephony monitoring log

A window with log information opens (e.g. for detecting errors)



CrmTapiNotifier	_ D X
Mitmoch, 8. Jun; 2016;11:5756;68:6507 (8):06:2016;11:5756;69:: Knofusciania aux Active Directory gelesen (RM-Server-URL: <u>http://cmr2016a//Tapi/XRMServices/2011/Organization.svc</u> (CRM-Organisation: Tapi Version: 8.1.1.0	_ ■
Mttwoch, 8. Juni 2016 11:58:26.328077 08:06:2016 11:58:26:328 - SocketDisconnect - Shutdown ausgeführt	_
Mttwoch, 8. Juni 2016 11:58:26.328077 08:06:2016 11:58:26:328 - SocketDisconnect - Close ausgeführt	
Mttwoch, 8. Juni 2016 11:58 26 328077 08.06 2016 11:58 26 328 - Keep Alve-Timer beendet	
Mttwoch, 8. Juni 2016 11:58:26.328077 08:06:2016 11:58:26:328 - SocketConnect - WebAppLH: <u>http://cmm2016ib/Tapi</u>	
Mittwoch, 8. Juni 2016 11:58 26 328077 08.06 2016 11:58 26 328 - SocketConnect - ServerUit: <u>http://cm.2016/b/Tapi/XRMServices/2011/Organization.avc</u>	
Mttwoch, 8. Jun 2016 11:58 26 328077 08.06 2016 11:58 26 328 - CFM Version: 8.0.0.1088	
Mitwoch, 8, Juni 2016 11:58:26.328077 (08:06:2015 11:58:26:328: Vedmindung zum TapiManager aufbauen Servername: com 2016 gle devehölden Serverport: 4505 Tagaline: tagiorometor chd de.45 Organisation: Tapi Telefonamic free be Vedmindungsaufbau öffnen: True	
Mttwoch, 8. Juni 2016 11:58 26 328077 08.06 2016 11:58 26 328 - Receive Timeout: 0	
Mttwoch, 8. Jun 2016 11:58 26 328077 08:06 2016 11:58 26 328 - KeepAlve-Timer gestartet	
Nativezch. 8. Jun 2016 11:58:26:34305 08:06:2016 11:58:26:343 - Gesendet - Chril vention="1.0" encoding="Lif-16"7>-dapiaction name="nitincal">-incallClert	>dine>
Mttwoch, 8. Juni 2016 11:58:26.343805 08.06:2016 11:58:26:343 - Die Verbindung zum TapiManager cm:2016jb devchd local - Pott: 4505 wird aufgebaut	~

My TAPI protocols A window with the current user's TAPI protocol opens.

-

+	→ Meine Tapi Protokolle -							Nach Daten
\checkmark	Nummer	Tapi Line	Interne Nu	Beginn des Anrufs 🛧	Verbindungsaufbau	Verbindungsende	Gesprächsz	Gesprächsri
	51	hicom.abc:25	28	05.08.2015 16:02	05.08.2015 16:02	05.08.2015 16:13	10 Minuten	Eingehend
	03	hicom.abc:25	10	05.08.2015 16:01	05.08.2015 16:02	05.08.2015 16:02	0 Minuten	Eingehend
	02	hicom.abc:25	10	05.08.2015 15:57	05.08.2015 16:00	05.08.2015 16:00	0 Minuten	Eingehend
		hicom.abc:25	10	05.08.2015 15:18	05.08.2015 15:21	05.08.2015 15:23	1 Minute	Eingehend
	07	hicom.abc:25	10	05.08.2015 14:47	05.08.2015 14:48	05.08.2015 14:50	2 Minuten	Eingehend
	03	hicom.abc:25	10	05.08.2015 14:24	05.08.2015 14:24	05.08.2015 14:25	0 Minuten	Eingehend
	02	hicom.abc:25	10	05.08.2015 14:15		05.08.2015 14:15	0 Minuten	Eingehend
	03	hicom.abc:25	10	05.08.2015 13:54	05.08.2015 13:55	05.08.2015 13:56	1 Minute	Eingehend
	03	hicom.abc25	10	05.08.2015 11:39		05.08.2015 11:39	0 Minuten	Eingehend
	03	hicom.abc:25	10	05.08.2015 11:21	05.08.2015 11:23	05.08.2015 11:23	0 Minuten	Eingehend
	03	hicom.abc:25	10	05.08.2015 10:35	05.08.2015 10:35	05.08.2015 10:37	1 Minute	Eingehend
	08	hicom.abc:25	28	05.08.2015 09:50	05.08.2015 09:50	05.08.2015 09:54	3 Minuten	Ausgehend
	03	hicom.abc:25	10	05.08.2015 09:41	05.08.2015 09:42	05.08.2015 09:43	0 Minuten	Eingehend



- Telephony settings

The TAPI user record for the logged in TAPI user opens

CrmTapiNotifier				
Microsoft Dynan	nics CRM \equiv Einstellungen 🗸	Tapi Schnittstellen 🛛 🗸 tapiconnector.chd.d 🗍 🗸		
+ NEU 🐻 DEAKTIVIERE	en 🚋 löschen 🖓 zuweisen 🗘 freigeben	ာ LINK PER E-MAIL SENDEN •••	↑ ↓ ∃ X	
TAPI SCHNITTSTELLE : INFO	DRMATIONEN			
tapiconne	ector.chd.de:45 -≡			
- Allgemein			^	
Tapi Name *	tapiconnector.chd.de:45			
Tapi Line Tapi Benutzer	a tapiconnector.chd.de:45 Jirka Bodschwinna	Besitzer * 🔒 Jirka Bodschwinna		
		_		
Typ und Angabe des ü	bergeordneten Datensatzes (Standard, Standort Dat	ensatz)		
Tapi Typ *	Benutzer	Übergeordneter Datei Standort		
Allgemeine Popup Eins	tellungen			
Anzeigedauer (s)	30	Telefonanruf öffnen bei mindestens einem Treffer		
Popup Position	links unten	Maximale Treffer 4		
Popup Breite	250	Popup Höhe 100		
Telefonanruf und Date	Nein	Telefonanruf erst bei \ Ja		
Keine Tapi Protokoll In	formation speichern und kein Popup Fenster bei fol	genden Telefonnummern (z.B. 200-300, 330)		
Kein Protokoll	30			
Kentrotokon				
Kein Popup Fenster	0-99		~	
Status vom Tapi Interl 🛛 🗛	ktiv			
Aktiv			H	

Edit configuration

The configuration dialogue for editing the configuration appears

🚖 Konfiguration bearbeiten				
CRM Server Organisation	https://cmserver.domain.local			
	Speichem Abbrechen			

End telephony monitoring

-

For ending the telephony monitoring. (The application is closed and the TAPI icon is removed from the information bar.)

3.8 Tapi Outlook AddIn

For CRM users working mainly with the locally configured CRM Outlook Client and wanting to use the TAPI interface, the monitoring of incoming calls can be carried out independently form the Web Client by using the TAPI Outlook Addin.

This AddIn connects with the TAPI Manager just as the Web Client.

An incoming call is indicated by a popup, just as with the Web Client. For this, an internet explorer on the client computer of the TAPI user has to be installed.

🚖 CRM TAPI Schnitt 🗕 🗖 🎽	:
034362826547 08.06.2016 11:5	8
E <u>Testfirma 2</u>	~
Hans Meier (ABC Firma)	
Eqon Olsen	×
Tapiline: tapiconnector.chd.de:45 Nr	45

3.8.1 Installing the TAPI Outlook AddIn

There is each an msi-file for 32 bit systems and for 64 bit systems in order to install the AddIn on the Client computer.

Administrator rights on the Client computer are necessary for the installation and uninstallation.

You can also install the AddIn per software distribution on multiple client computers.

🖟 Microsoft Dynamics CRM T	api Outlook Add-In Setup — 🗆 🗙
S	Welcome to the Microsoft Dynamics CRM Tapi Outlook Add-In Setup Wizard
	The Setup Wizard will install Microsoft Dynamics CRM Tapi Outlook Add-In on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
	Back Next Cancel

DONAUBAUER AKTIENGESELLSCHAFT

Destination Folder
Click Next to install to the default folder or click Change to choose another.
Install Microsoft Dynamics CRM Tapi Outlook Add-In to:
C:\Program Files\Donaubauer\CrmTapiOutlook\
<u>C</u> hange
<u>B</u> ack <u>N</u> ext Cancel
🖟 Microsoft Dynamics CRM Tapi Outlook Add-In Setup — 🗌 🗙
Ready to install Microsoft Dynamics CRM Tapi Outlook Add-In
Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.





3.8.2 Configuration of the CRM Tapi Outlook AddIn

Verbindung mit Micros	oft Dynamics CRM herstellen	×
Microsof	t Dynamics CRM	
Domain\Benutzemame: Kennwort:		
	Kennwort speichem und Verbindung automatisch herstellen	
	OK Abbrec	hen

The CRM server and the organization are loaded form the registry. For this purpose, the registry entries generated while configuring the CRM Outlook Client are used.

For the initial start of the TAPI Outlook AddIn, please transmit the login information. This information can be saved to the Windows vault.

3.8.3 Using the CRM TAPI Outlook AddIn



The TAPI icon appears in the information bar bottom right.

- Green: telephony monitoring is active
- Yellow: The TAPI line of the TAPI user was not logged in or licensed by the TAPI Connector
- Red: telephony monitoring is not active (or error, see log information)

A right click on the TAPI icon opens a context menu for using the CRM TAPI Outlook AddIn.

Telefonie-Überwachung ein Telefonie-Überwachung aus

Telefonie-Überwachung Log

- Telephony monitoring on/off

For turning the telephony monitoring on or off. If the telephony monitoring is turned off, the TAPI icon will appear red.

Telephony monitoring log

A window with log information opens (e.g. for detecting errors)



3.8.4 Uninstalling the TAPI Outlook AddIn

In order to uninstall the TAPI Outlook Addin, please call the msi-file again.

DONAUBAUER AKTIENGESELLSCHAFT

🔀 Microsoft Dynamics CRM T	api Outlook Add-In Setup	_		×
	Welcome to the Micro Tapi Outlook Add-In The Setup Wizard allows you to Dynamics CRM Tapi Outlook Add your computer or to remove it fi Next to continue or Cancel to ex	soft Dyna Setup Wiz change the wa I-In features a rom your comp kit the Setup V	mics CF ard ay Microsof re installec uter. Click /izard.	RM ft Jon
	Back	<u>N</u> ext	Cance	el
e Missaaft Dunamiss CPM T	ani Outlaak Add In Satur			~
Change, repair, or remove Select the operation you wis	ve installation h to perform.	_	¢	Ŝ
Change Microsoft Dynamics features. Repair Repairs errors in th files, shortcuts, an <u>R</u> emove Remove	s CRM Tapi Outlook Add-In has no ne most recent installation by fixing d registry entries.	independently g missing and c	orrupt	2
itemoves microsoft		an nom your e	empererr	
	<u>B</u> ack	Next	Cance	el



🖟 Microsoft Dynamics CRM T	api Outlook Ad	ld-In Setup		-		×
Ready to remove Microsoft Dynamics CRM Tapi Outlook Add-In						
Click Remove to remove Micr computer. Click Back to revie to exit the wizard.	rosoft Dynamics w or change an	CRM Tapi Ou y of your ins	ıtlook Add-In tallation settir	from you ngs. Click	ur K Cancel	
	Ba	ck 📃	<u>R</u> emove		Canc	el
🖟 Microsoft Dynamics CRM T	api Outlook Ad	ld-In Setup		-		×
Ð	Complete Tapi Outl	d the Mi ook Add	crosoft D -In Setur	ynami) Wiza	cs CR rd	М
	Click the Finis	h button to e	xit the Setup	Wizard.		
	I	<u>B</u> ack	<u> </u>		Cano	el



If you have any questions concerning our CRM TAPI Interface or need additional support, do not hesitate to contact us.

Below you will find the contact information of the Donaubauer AG:



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