AvePoint CallAssist 3.2.1 for Microsoft Dynamics® CRM

Installation and Configuration Guide

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Overview

The CallAssist application retrieves entities' information and their columns from Dynamics CRM 2013 or Dynamics CRM 2011 by searching the Dynamics CRM database according to a user-entered keyword. Then, the user can use the searched information to make a call, create a phone call activity, send an e-mail, and open the entity in Dynamics CRM.

The entities and their columns from which information is retrieved depend upon what is configured in the CallAssist Admin Tool. This tool imports the **CallAssistAdmin** solution into your Dynamics CRM environment and creates a customized entity named **AvePoint CallAssist Configuration** that manages the scope of the entities and the columns that CallAssist is able to retrieve and use.

The CallAssist product has three components: the CallAssist Admin Tool (used and configured by Dynamics CRM administrators), the CallAssist solution (deployed by configuring the CallAssist Admin Tool), and the CallAssist application (used and configured by end-users).

Prerequisites

Refer to the section below for the prerequisites for using the CallAssist Admin Tool and the CallAssist application.

- For a list of supported Microsoft Dynamics CRM versions, see [Environment Requirements](#).
- To run the CallAssist Admin Tool, the Dynamics CRM administrators must have **Write** permission to the extracted **CallAssistAdminTool** folder.

- To configure Entity Retrieve and Inquiry Rules settings in the CallAssist Admin Tool, Dynamics CRM administrators must have the **System Administrator** security role in the Dynamics CRM environment.

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Environment Requirements

Refer to the environment requirements for the CallAssist Admin Tool, the CallAssist solution, and the CallAssist application.

CallAssist Admin Tool Supported Operating Systems

The CallAssist Admin Tool is supported on the following operating systems: Windows® 7 64-bit, Windows 7 32-bit, Windows 8 64-bit, Windows Server 2008 R2 SP1 Enterprise 64-bit, and Windows Server 2012 Enterprise 64-bit.

CallAssist Solution Supported Dynamics CRM Environments

The CallAssist solution, which is imported by the CallAssist Admin Tool, is supported on the following English Dynamics CRM environments: Dynamics CRM 2011 Online, Dynamics CRM 2011 RTM, Dynamics CRM 2011 UR14, and Dynamics CRM 2013 Online and On-Premises.

System Requirements for the CallAssist Application

The requirements for the CallAssist application:

- The CallAssist application is supported on Windows 7 64-bit, Windows 7 32-bit, Windows 8 64-bit, and Windows Server 2008 R2 SP1 Enterprise 64-bit. Skype 5.1, 6.7, Lync 2010, 2013 and ShoreTel 11.2 are supported by the CallAssist application.

- Requires .NET Framework 4.0 or higher to be installed on the user's operating system.

- Requires the TAPI provider to be installed. If the user uses the softphone, make sure the softphone works.

- Requires the TAPI version to be installed and compatible with TAPI 3.x.

Overview of Installation and Configuration

To properly install and configure the CallAssist application, perform the following steps in order. Click the links to jump to the corresponding sections for detailed instructions.

Dynamics CRM Administrator Tasks

A Dynamics CRM Administrator must complete the following tasks before end-users can fully use the CallAssist product.

1. Using the CallAssist Admin Tool
    a. Accessing the CallAssist Admin Tool
    b. Configuring Entity Retrieve and Inquiries Rules
2. Configuring a Security Role for End-Users

Dynamics CRM End-User Tasks

The following are tasks that Dynamics CRM end-users can perform using CallAssist.

1. Configuring a Security Role for End-Users
2. Installing CallAssist
3. Configuring CallAssist Settings
    a. Configuring CallAssist Settings for the First Time
        - Configuring General Settings
        - Configuring Control Settings
        - Configuring Local Settings
        - Configuring the Connection to Your Dynamics CRM Environment
        - Configuring Providers
    b. Signing into CallAssist
    c. Configuring CallAssist Settings After Signing in (optional)
        - Configuring the CallAssist Application's Entity Retrieve and Inquiries Rules
4. Applying a CallAssist License

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Using the CallAssist Admin Tool

Prior to using the CallAssist application, the Dynamics CRM administrator must configure the **Entity Retrieve** and **Inquiries Rules** in the CallAssist Admin Tool. The **Entity Retrieve** settings determine which entity and column information will be retrieved from your Dynamics CRM database. The **Inquiries Rules** settings determine what information will be retrieved and displayed when there is an incoming call.

When the Dynamics CRM administrator finishes configuring the **Entity Retrieve** and **Inquiries Rules**, this tool will import the **CallAssistAdmin** solution into the Dynamics CRM system and create an **AvePoint CallAssist Configuration** entity for managing these configurations. The configured **Entity Retrieve** and **Inquiries Rules** will be used by all of the CallAssist applications within the Dynamics CRM environment.

When the **CallAssistAdmin** solution is deployed on the Dynamics CRM environment, a **Call Numbers** button is added to the Dynamics CRM ribbon of the entities that were configured in the CallAssist Admin Tool. The **Call Numbers** button transfers the record information into CallAssist directly.

Accessing the CallAssist Admin Tool

Follow the steps below to access this tool and configure the connection settings:

1. Extract the **AvePoint_CallAssist_for_Dynamics_CRM_Serial_Number.zip** file and find the **AdminsolutionTool_Serial_Number.zip** file in the extracted folder.

2. Copy the **AdminsolutionTool_Serial_Number.zip** file to any machine that can connect to your Dynamics CRM and extract this file.

3. Open the **CallAssistAdmin** folder, find the **CallAssistAdminTool.exe** file and double-click it to start this program.

   *Note: Write permission to the extracted folder is required to run **CallAssistAdminTool.exe**.

4. When you start the program for the first time, the **Personal Settings** page appears. Enter the Dynamic CRM environment information:

   a. **Dynamics URL** – Enter the URL of the Dynamics CRM environment that you are using, for example, **http://10.1.48.123:5555** (on-premises) or **https://abc.crm.dynamics.com** (online).

   b. **Account Name** – Enter the username for logging into the Dynamics CRM environment.

   c. **Password** – Enter the corresponding username's password.

5. Click **Save** to connect to the specified Dynamics CRM environment. To change the settings in the **Personal Settings** page, right-click on the Windows taskbar and select **Settings**.

6. After connecting to Dynamics CRM, the **AvePoint CallAssist Admin Tool for Dynamics CRM** interface appears. Continue to configure the **Entity Retrieve** settings and the **Inquiries Rules** settings.

Configuring Entity Retrieve and Inquiries Rules

The **Entity Retrieve** settings are used to specify which entity and column information CallAssist can retrieve from Dynamics CRM. The **Inquiries Rules** settings are used to specify what information will be retrieved and displayed when there is an incoming call. Follow the steps below to configure the **Entity Retrieve** settings and the **Inquiries Rules** settings.

1. On the **AvePoint CallAssist Admin Tool for Dynamics CRM** interface, click **Retrieve** to retrieve the information of all entities and their columns from Dynamics CRM.

   During the retrieving operation, the **Retrieve** button is greyed out. When the **Retrieve** button becomes active again, the retrieving process is complete.

2. To configure the **Entity Retrieve** settings, follow the instructions below. The entities and columns you added determine what can be retrieved from Dynamics CRM to CallAssist.

   a. In the **Entity Retrieve** area, click ; the **Entity Customization** pop-up appears. Select an entity from the **EntityName** drop-down list.

   b. Click **Add Column**; a drop-down list appears in the blank field under the **EntityName** list.
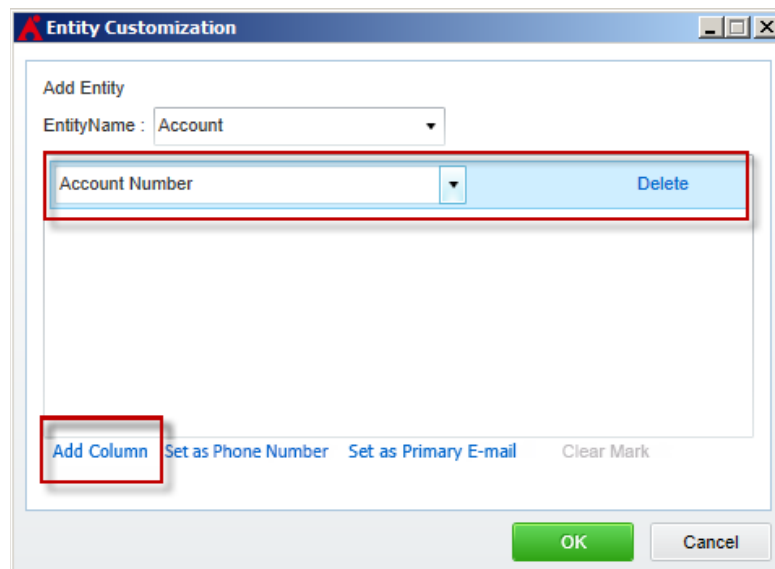
Figure 1: A drop-down list appears in the blank field under the EntityName list.

   c. Select a column from the newly appeared list.

   d. Repeat steps b and c to add the desired columns.

   If you have added a column that contains a contact's e-mail address, click **Set as Primary E-mail**. An e-mail address that has been set as the primary e-mail can be displayed in the **Contacts** tab in CallAssist application, allowing the user to send an e-mail by calling the system's default e-mail server. E-mail addresses that have not been set as the primary e-mail do not automatically start the system's default e-mail server, as they are not clickable links.

AvePoint CallAssist for Microsoft Dynamics CRM
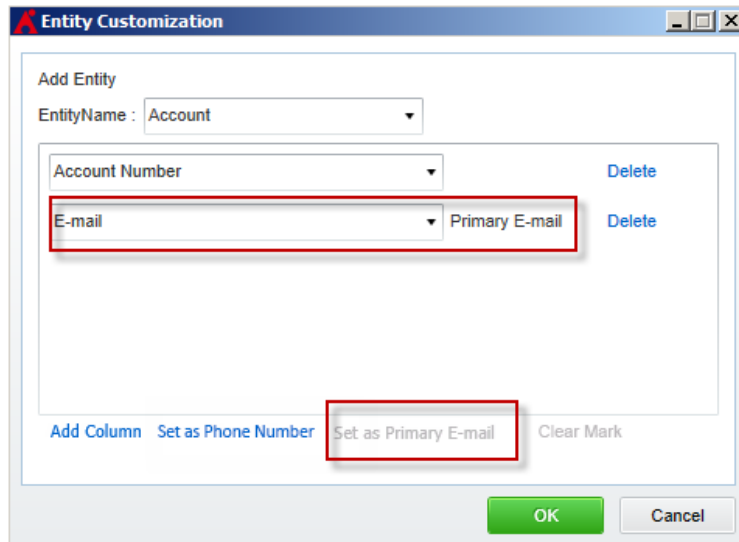
Figure 2**:** Selecting a column and set it as the primary e-mail.

If you have added a column that contains a contact's phone number, click **Set as Phone Number**. Once a column has been set as a phone number column, you can perform a fuzzy search on the values of this column using the retrieve function in CallAssist. When searching for phone numbers in this column, omit the following characters in the keyword: **- + # * ( )**. For example, you can find the phone number *(123)123-4567* with the keyword "1231234567".
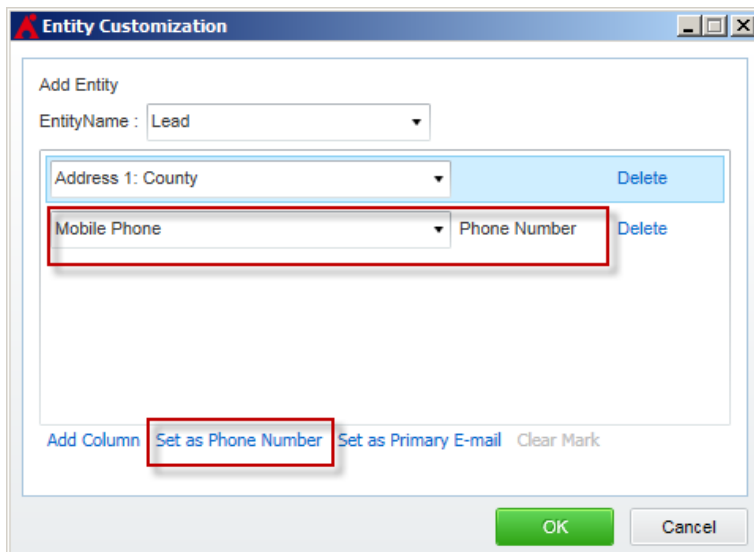

Figure 3: Selecting a column and set it as a phone number column.

    e.   Click **OK** to save all of the settings and return to the main interface.
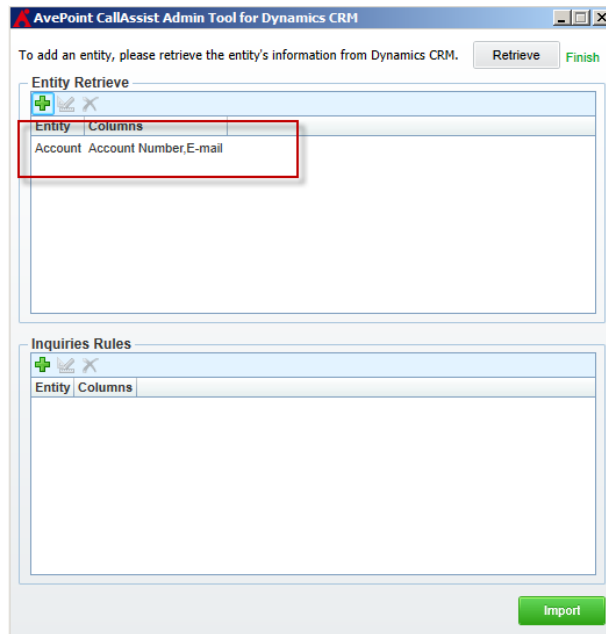
Figure 4: Settings are saved.

  f. Repeat steps a through e to add other desired entities and their columns. You can select a row and click to edit the settings or click to delete it.

3. To configure the **Inquiries Rules** settings, follow the steps below. The entities and columns you added determine what information will be retrieved and displayed when there is an incoming call.

  a. In the **Inquiries Rules** area, click ; the **Entity Customization** pop-up appears. Select an entity from the **EntityName** drop-down list.

  b. Click **Add Column**; a drop-down list appears in the blank field under the **EntityName** list.

  c. Select a column from the newly appeared list.

  d. Repeat steps b and c to add the desired columns.

  e. Click **OK** to save all of the settings and return to the main interface.

  f. Repeat steps a through e to add other desired entities and their columns. You can select a row and click to edit the settings or click to delete it.

4. Click **Import** to apply your settings to Dynamics CRM. The following actions are performed:

- An AvePoint CallAssist Configuration entity is created in Dynamics CRM. Navigate to **Settings** > **Customizations** > **Components** > **Entities**, and click **AvePoint CallAssist Configuration** to verify your settings.

AvePoint CallAssist for Microsoft Dynamics CRM
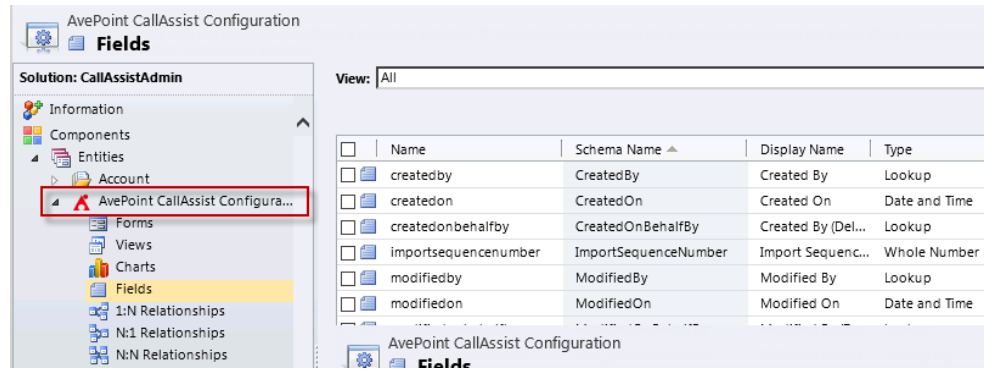
Figure 5: A newly created AvePoint CallAssist Configuration entity.

- A CallAssist tool is imported to Dynamics CRM. Navigate to **Settings** > **Solutions** to view the imported tool.

- A Call Numbers button is added to your Dynamics CRM. To use the added **Call Numbers** button, refer to *CallAssist for Microsoft® Dynamics CRM User Guide.*

  The table below lists the supported status of some web browsers when using the Call Numbers function:

Web Browser	Supported Status
Internet Explorer 8	Supported
Internet Explorer 9	Supported
Internet Explorer 10	Supported
Google Chrome	Supported
Firefox	Supported
Safari	Unsupported

This concludes the process of specifying the entities and columns available for retrieval by CallAssist. When using CallAssist to connect to the same Dynamics CRM organization as the one configured in the CallAssist Admin Tool, the information that can be retrieved from Dynamics CRM will be limited to the entities' information and the columns specified in CallAssist Admin Tool.

Configuring a Security Role for End-Users

Prior to using CallAssist, end-users must first retrieve from the Dynamics CRM environment the settings that were configured in the CallAssist Admin Tool. To ensure that end-users can retrieve these required settings, a Dynamics CRM administrator must grant end-users organization-level **Read** permission to the **AvePoint CallAssist Configuration** entity in the Dynamics CRM environment.

To configure a security role with the required permission for end-users, create a new or edit an existing security role:

Editing an Existing Security Role

If a security role is already assigned to end-users, AvePoint recommends granting permissions to the end-users by editing the security role. To do this, complete the following steps:

1. Log on to your Dynamics CRM environment.
2. Navigate to **Settings** > **System** > **Administration**> **Security Roles**.
3. In the **Security Roles** interface, click the security role you want to edit. The page for editing the selected security role appears.
4. Navigate to the **Custom Entities** tab.
5. Set the permission for **AvePoint CallAssist Configuration** entity to **Organization** level **Read**.
6. Click **Save** or **Save and Close** to save the change to this security role.

Creating a New Security Role

If desired, a Dynamics CRM administrator can create a new security role with the required permission and then assign the role to the end-users. To do this, complete the following steps:

1. Log on to your Dynamics CRM environment.
2. Navigate to **Settings** > **System** > **Administration** > **Security Roles**.
3. In the **Security Roles** interface, click **New** on the ribbon. The page for creating a new security role appears.
4. In the **Details** tab, specify the **Role Name** and **Business Unit** for the security role you want to create.
5. Navigate to the **Custom Entities** tab.
6. Set the permission for **AvePoint CallAssist Configuration** entity to **Organization** level **Read**.
7. Click **Save** or **Save and Close** to create this new security role.
8. Navigate to **Settings** > **System** > **Administration** > **Users**.

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9. In the **Users** interface, select the users you want to assign the newly created security role and click **Manage Roles** on the ribbon.

10. In the **Manage User Roles** pop-up, select the new created security role and click **OK** to assign this role to the selected users.

Installing CallAssist

Before end-users can install the CallAssist application, a Dynamics CRM administrator must ensure that the CallAssist Admin Tool was configured as described in Using the CallAssist Admin Tool.

To use CallAssist, one or more instances of Lync, Skype, or other applications supporting the Telephony Application Program Interface (TAPI) service must be installed on the end-user's machine.

Follow the instructions below to install CallAssist onto a Windows Operating System machine.

1. In the **AvePoint_CallAssist_for_Dynamics_CRM_Serial_Number** folder extracted in step 1 of Accessing the CallAssist Admin Tool, find the **AvePoint_CallAssist_for_Dynamics_CRM_ Serial_Number.msi** file.

2. Copy the **AvePoint_CallAssist_for_Dynamics_CRM_ Serial_Number.msi** file onto the machine where you want to install the CallAssist application.

   *Note: You can manage Group Policy for your Windows Operating System installation using the .msi file

3. Double-click the **.msi** file. The installation wizard starts with the **Welcome** page.

4. Click **Next**. The **License Agreement** page appears. Read the license agreement, and then select **I Agree.**

5. Click **Next**. On the **Select Installation Folder** page, click **Browse** to specify where to install the application. The default installation location is *C:\Program Files (x86)\AvePoint\CallAssist for Dynamics CRM*.

6. Select **Just me** to install the CallAssist application for yourself, or select **Everyone** to install this application for anyone who uses this computer.

7. Click **Next**. The **Confirm Installation** page appears.

8. Click **Next** to start the installation.

9. When the installation completes, click **Close** to exit the installation wizard.

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Configuring CallAssist Settings

After installing CallAssist, end-users must configure the settings on the three tabs in the **Settings** page before end-users can use the application. Upon starting the application for the first time, both the login interface and the **Settings** page appear. After configuring the required CallAssist settings, the **Settings** page no longer appears during CallAssist startup.

To configure the optional advanced settings for the CallAssist application, sign into CallAssist and configure the advanced CallAssist settings on the **Advanced** tab of the **Settings** page. The **Advanced** tab is visible only after logging into the CallAssist application.

Select the **Start CallAssist** option in the installation wizard to start the application automatically after exiting the installation wizard. Otherwise, to start the application, double-click the **CallAssist** shortcut on the desktop.

- **General** tab contains basic configuration settings.
- **Dynamics CRM Settings** tab is where end-users can specify the Dynamics CRM environment that they are using.
- **Provider** tab is used to add and verify new call providers. The three available providers are TAPI, Skype, and Lync.

Configuring CallAssist Settings for the First Time

Refer to the following instructions to configure the settings in the **Settings** page for the first time.

*Note: Settings marked with * in the GUI are required fields. It is not required to configure these three tabs in order as long as all of the required fields are configured.

Configuring General Settings

Configure **General Settings** to define when to start CallAssist and how long to keep incoming and outgoing call records.

10. Click the **General** tab.

11. Configure the following settings:

- **Start CallAssist when start windows** – Select this checkbox to start the application automatically when starting Windows.
- **Minimize to system tray on close** – Specify whether to minimize the CallAssist application to the system tray when you click the close button on the upper right corner.

    o With this checkbox selected, the CallAssist application will minimize to the system tray when you click the close button on the upper right

corner. If desired, you can restore it from the system tray. To exit the application, navigate to the **File** menu and lick **Exit**.

- o   With this checkbox unselected, you can exit CallAssist application directly by clicking the close button.

- **Keep History for** – Specify whether to set a retention period for the records of incoming and outgoing calls.

  - o   To set a retention period for the records, select the **Keep History for** checkbox and select the time range from the drop-down list to specify how long to keep the records. The records that are not within the specified time range are deleted when the application is closed.

  - o   If you do not select the **Keep History for** checkbox, the call history records will not be automatically pruned.

- **Clear All Histories** –Click this button to delete all of the call history immediately.

Configuring Control Settings

Configure the **Control Settings** to define the action to perform when double-clicking a contact, whether to create a phone call activity when dialing begins, the number of displayed records in the **Contacts** tab, and whether to update the call duration information into Dynamics CRM.

Click the **General** tab and configure the following settings:

- **Retrieve Count** – Select a number from the drop-down list to specify how many records are displayed when you search for information in the Dynamics CRM. The information retrieved during a search displays on the **Contacts** tab on the main interface.

- **Create a Phone Call Activity for each call** – When you make a call, CallAssist can create and log a phone call activity in Dynamics CRM according to what is configured here.

  - o   **Always** – Creates a phone call activity automatically. If you select this option, a pop-up window appears when dialing begins. Edit the information in this pop-up window and then click **OK** to upload the activity information to Dynamics CRM.

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Figure 6: The Phone Call Activity pop-up window appears.

- o **Alert** – Prompts the user to create an activity. If you select this option, a pop-up window appears, asking you whether to create a phone call activity. Choose **Yes** to create an activity or choose **No** to not create an activity.

- o **None** – Does not prompt the user to create a phone call activity.

- **Start a call on Double-Click** – Select this checkbox to call a contact (using the default provider) when you double-click the record or the phone number in the **Contacts** tab.

- **Update the call duration information in Dynamics CRM** – Select this checkbox to update call duration information to the **Duration** column of the corresponding Phone Call activity in Dynamics CRM.

Configuring Local Settings

Configure **Local Settings** to define the country that CallAssist is being used in, to set the prefix number, and to specify the number of digits in the end-user's internal line phone number.

Click the **General** tab and configure the following settings:

- **Country** – Select the country in which the application will be used: **United States and Canada**, **Germany**, or **China**. If you are not in the three zones listed, select **None**. The phone number will display in the local format when dialing depending on what region is selected. It is recommended to select the country whose phone number format is used in your Dynamics CRM.

- **Prefix Number** – If you dial a number to access an outside line, set the number as the prefix number in this field. This prefix number is not displayed when dialing. By default, this area is blank.

- **# of digits for internal extension** – Specify the number of digits in your internal line so that CallAssist dials correctly when making an internal call. By default, the value is **4**.

After you have completed the configurations on the **General** tab, click **Apply** to apply the settings.

Configuring the Connection to Your Dynamics CRM Environment

Navigate to the **Dynamics CRM Settings** tab and then enter the following details.

1. **Dynamics CRM URL** – Enter the URL of the Dynamics CRM environment that you are using.

2. **Account Name** – Enter the username for logging into the Dynamics CRM environment.

3. **Password** – Enter the corresponding username's password.

4. After you have completed the configurations on the **Dynamics Settings** tab, click **Test** to confirm that the information you entered is valid, and then click **Apply** to apply the settings.

Configuring Providers

In order to use CallAssist, end-users must add the applicable providers and set one as the default provider. The default provider will be called automatically when the user makes a call. It is possible to add other providers in the interface, if desired.

To access the provider settings, click the **Provider** tab in the **Settings** interface. There are three providers to select from: TAPI, Skype, and Lync.

- **TAPI** – Select this method to make calls using software that supports the TAPI service.
- **Skype** – Select this method to make calls using Skype.
- **Lync** – Select this method to make calls using Lync.

Follow the steps below to add providers and set one as default:

1. Click . The **Provider Settings** pop-up window appears.

2. Select a provider from the drop-down list. The first provider you add will be the default provider and you can change it according to your requirements.

3. Click **Save** to save the configuration.

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4. Repeat steps through 1 to 3 for all desired providers. The newly-added providers are listed as shown below. The first added provider has been set as the default one.
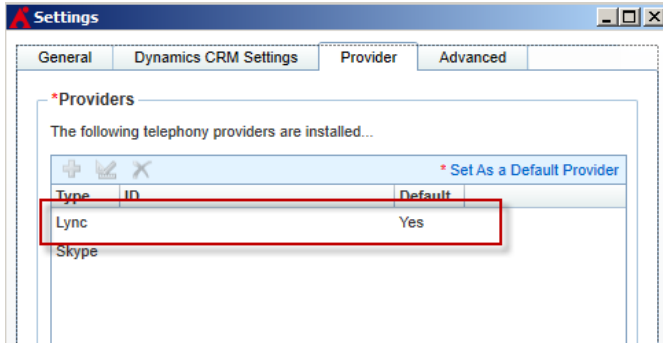

Figure 7: Newly-added providers in the list.

To change the default provider, select one provider and click **Set As a Default Provider** to set the selection as the default provider.
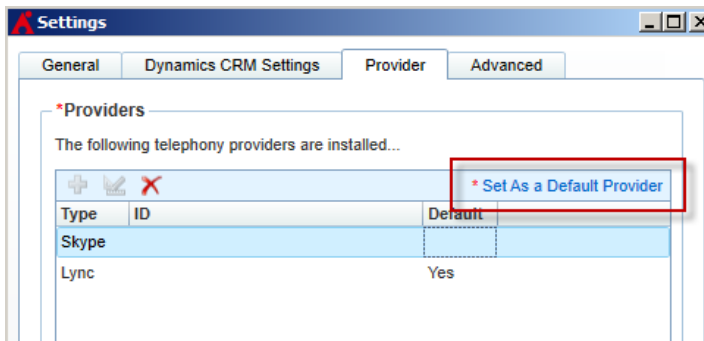
Figure 8: Setting the default provider.

If you have selected Skype as the default provider, there will be a pop-up displaying a message: **CallAssist.exe wants to use Skype**. Click **Allow access** to allow CallAssist to use Skype. You can navigate to **Skype** > **Tools** > **Options** > **Advanced**, and click **Manage other programs' access to Skype** to manage the access control.
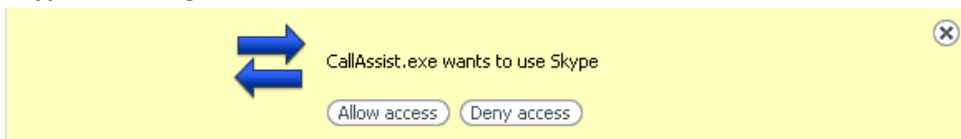
Figure 9: Clicking Allow access to allow CallAssist to use Skype.

5. To delete a provider, click ✘ to delete the selected provider. To edit the TAPI provider, select the provider and click 📝 to switch among the available TAPI providers.

6. After you have completed the configurations on the **Provider** tab, click **Apply** to apply the settings.

7. With all of the required settings in the above three tabs are configured and applied, click **Save** to exit the **Settings** page and return to the sign-in interface. If you want to change the previously configured settings, click **Settings** to open the **Settings** page and edit the desired settings.

Signing into CallAssist

In the sign-in page, the **Account Name** and **Password** configured on the **Dynamics CRM Settings** tab are automatically filled in the **Name** and **Password** fields. Click **Sign In** to log into CallAssist and continue with your configurations.

Configuring CallAssist Settings After Signing in

After you sign in CallAssist, click the settings button on the upper-right corner (⚙) to open the **Settings** page. Then you can edit the settings in **General** tab, **Dynamics CRM Settings** tab, **Provider** tab and configure the optional **Entity Retrieve** and **Inquires Rules** settings on the **Advanced** tab.

To edit the settings in the **General** tab, **Dynamics CRM Settings** tab, and **Provider** tab, refer to Configuring CallAssist Settings for the First Time. To configure the **Entity Retrieve** and **Inquires Rules** settings on the **Advanced** tab, refer to the instructions below.

Configuring the CallAssist Application's Entity Retrieve and Inquiries Rules

The **Advanced** tab displays the entities' information and the columns that you specified in the CallAssist Admin Tool. In addition, this tab allows users to set inquiries rules, which specify the information that displays when a call is incoming.

Refer to the following two sections for details on configuring **Entity Retrieve** and **Inquires Rules** within the **Advanced** tab.

Before configuring, click **Retrieve** to obtain the retrieval settings configured using the CallAssist Admin Tool from Dynamics CRM.

Configuring Entity Retrieve

The entities and corresponding columns that are specified in the CallAssist Admin Tool are listed in the **Entity Retrieve** area of the interface. CallAssist retrieves entity information from the Dynamics CRM database and displays this information in the **Contacts** tab in CallAssist.

You can modify the priority by selecting one entity, and then clicking ⬆ or ⬇ to adjust the order. The information is displayed in the **Contacts** tab according to the configured priority order.

Configuring Inquiries Rules

When there is an incoming call, CallAssist can retrieve information from the Dynamics CRM database and display the caller's information. The entities and corresponding columns that are specified in the CallAssist Admin Tool are listed in the **Inquiries Rules** area of the interface. You can use the settings configured by CallAssist Admin Tool or select your desired entities and corresponding columns from the listed ones to reduce the kinds of the displayed information.

1. In the **Inquiries Rules** area, select a row that you want to edit and click 📝.

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5. On the **Entity Customization** pop-up window, click **Delete** to delete the desired column.

6. Click **OK** to save the modifications. The information containing the deleted column will not display when there is an incoming call.

You can modify the priority by selecting one entity, and then clicking ⬆ or ⬇ to adjust the order. The information displays when there is an incoming call according to the configured priority order.

After you have completed the configurations on the **Advanced** tab, click **Apply** to apply the settings.

Applying a CallAssist License

By default, a 30-day trial license is automatically applied upon installation. This license ensures that end-users can have CallAssist up and running right after configuring the CallAssist **Settings**. To obtain an official license, contact your local AvePoint representative.

To apply a license, follow the steps below.

1. Sign into CallAssist and navigate to **Help** > **Product Registration**. The **License** pop-up window appears.

2. Click **Upload** to browse and choose the desired LIC file, and then click **Open** to import the license.

3. If the selected license is a trial license, it will be applied immediately. If the selected license is an Enterprise license, you must select the **I accept terms in the License Agreement** checkbox in the **End-User License Agreement** page and then click **OK** to apply the license.

After the license is applied successfully, the license information is displayed:

- **License Type** – Displays the license type information.

  o **Trial License** – The trial license that has the limited validity period.

  o **Enterprise License** – The formal license to register the product. The validity period in this license is decided according to your purchase.

- **Valid Period** – Displays the valid period of this license.

- **Organization GUID** – The GUID of the Dynamics CRM organization that can register CallAssist using this license.

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