



IP Office Technical Tip

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Region: GLOBAL

Microsoft CRM Dial buttons not appearing in Accounts or Contacts

Avaya CRM integration 2.1.2 and Microsoft CRM 1.2

It has been highlighted to Avaya Technical Support that periodically after installing the Microsoft CRM solution with the Avaya integration software application, the Dial buttons do not appear within the CRM application. This has caused problems for some users with regard to outbound dialing from within the CRM Accounts and Contacts screens.

The issue relates directly to a file called ISV.CONFIG and this resides on the IIS server at the following location c:\inetpub\wwwroot_Resources.

If modifications have been made to previous versions of the ISV.CONFIG file prior to Avaya integration software being installed and is copied back overwriting the previous version then these settings may not appear and the dial functions may not be possible. After installation of all the software, if the issue is encountered it will be necessary to edit this file within Notepad or some other text editor and search for the relevant sections. These sections being within the Microsoft Customer Relationship Management Entities (Objects) section:

- For dial buttons to appear in the Accounts pages you must ensure that the following entries are present:

```
<!-- Microsoft Customer Relationship Management Entities (Objects) -->
```

```
<Entities>
```

```
<account>
```

```
<!-- The Account Tool Bar -->
```

```
<ToolBar ValidForCreate="0" ValidForUpdate="1">
```

```
<Button Title="Dial(main)" ToolTip="Dial (main) phone number"  
Icon="/_imgs/ico_Av_16_0603.gif" Url="http://localhost:81/Phone1.htm"  
PassParams="1"
```

```

WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px"
WinMode="2" Id="Main"/>
<ToolBarSpacer/>

<Button Title="Dial(Other)" ToolTip="Dial (Other) phone number"
Icon="/_imgs/ico_Av_16_0603.gif" Url="http://localhost:81/phone2.htm"
PassParams="1"
WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px"
WinMode="2" Id="Other"/>

</ToolBar>
</account>

```

With the inclusion of above code this will add the Dial buttons offering the ability to dial directly from within the Accounts pages.

- For dial buttons to appear in the Contacts pages you must ensure that the following entries are present:

```

<!-- The Contact Tool Bar -->
<ToolBar ValidForCreate="0" ValidForUpdate="1">
  <Button Title="Dial(Business)" ToolTip="Dial (Business) phone number"
  Icon="/_imgs/ico_Av_16_0603.gif" Url="http://localhost:81/Phone1.htm"
  PassParams="1"
  WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px"
  WinMode="2" Id="Business"/>
  <ToolBarSpacer/>
  <Button Title="Dial(Home)" ToolTip="Dial (Home) phone number"
  Icon="/_imgs/ico_Av_16_0603.gif" Url="http://localhost:81/phone2.htm"
  PassParams="1"
  WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px"
  WinMode="2" Id="Home"/>
  <ToolBarSpacer/>
  <Button Title="Dial(Mobile)" ToolTip="Dial (Mobile) phone number"
  Icon="/_imgs/ico_Av_16_0603.gif" Url="http://localhost:81/phone3.htm"
  PassParams="1"
  WinParams="help:no;status:no;dialogHeight:300px;dialogWidth:400px"
  WinMode="2" Id="Mobile"/>
</ToolBar>

```

Once these additions have been added it will be necessary to restart the IIS service. This is achieved by opening a command prompt window and typing the following parameter: IISreset
Alternatively, you can manually restart the IIS service within the service control window.

It may also be necessary to check and/or amend the following file, WEB.CONFIG, to ensure that the ISV.CONFIG file is loaded and used by the server services. The file is located at:

C:\inetpub\wwwroot\WEB.CONFIG

You must ensure that the file shows ISV configuration and that the following value is set:

```
<add key="ISVIntegration" value="on"/>
```

The above changes may also be required if the Avaya MS CRM Integration software is to be loaded onto an existing Microsoft CRM system. The installation process of the Avaya MS CRM integration software copies a pre-configured version of the ISV.config file and any changes that have been made previously may be lost. If the existing

ISV.config has been previously modified for specific customer needs then it would be advisable to manually amend the ISV.Config to show the above settings.

A preconfigured ISV.config file can be found on the User CD within the Avaya IP Office suite, at the following location:

D:\CRMServerInstall\Inetpub\WWWRoot_Resources
(D being the associated CD Rom drive letter)

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