

Phone Manager Application Support - Microsoft Dynamics NAV

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APPLICATION SUPPORT



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Microsoft Dynamics NAV

Overview

This describes the features that are available when integrating with Microsoft Dynamics NAV.

Supported Versions

The following Microsoft Dynamics NAV versions are supported.

Version	Client	Supported
v4.0 SP2	Classic Client	
v5.00	Classic Client	
v6.00 (2009)	Classic Client	
v6.00 (2009 R2)	RoleTailored Client	
v7.00 (2013)	Web Client	
v7.00 (2013 R2)	RoleTailored Client	
v9.00 (2016)	Web Client	
v9.00 (2016)	RoleTailored Client	
v10.00 (2017)	Web Client	
v10.00 (2017)	RoleTailored Client	

Features

Integration with Microsoft Dynamics NAV supports the features listed below:

- [Screen pop](#)

Screen pop

Microsoft Dynamics NAV *Contact* or *Customer* cards can be screen popped directly within NAV when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* was found and the card was automatically displayed within the NAV client.

This example shows the RoleTailored Client.

View - Contact Card - CT000145 - Roberto Rivero

Home Actions Navigate Report

View New Edit Delete Apply Template... Sales Quotes Statistics Contact Cover Sheet

Manage Process Report

CT000145 - Roberto Rivero

General

No.: CT000145 Post Code:

Type: Person Country/Region ...

Company N... CT000142 Search Name: ROBERTO RIV...

Company N... Mitel Phone No.: 222 555 4444

Name: Roberto Rive... Salesperson Code:

Address: Salutation Code: UNISEX

Address 2: Last Date Modifi... 04/08/2014

City: Date of Last Inter...

County: Last Date Attemp...

Next To-do Date:

Links

Link Address Descrip

Notes

Click here to create a new note.

Communication

Phone No.: 222 555 4444 E-Mail:

Mobile Pho... 777 444 1111 Home Page:

Close

7774441111 00:02

7774441111

Clear call

This example shows the Microsoft Dynamics NAV web client, the matching contact is shown using the Users default browser settings.

View - Contact Card - CT000145 - Matthieu Gagnon

Home Actions Navigate Report General Manage

Close Edit New Apply Template... Sales Quotes Statistics Contact Cover Sheet

Manage Process Report

General

No. CT000145 Country/Region Code

Type Person Search Name MATTHIEU GAGNON

Company No. CT000142 Phone No. 222 555 4444

Company Name MOTO GP Salesperson Code

Name Matthieu Gagnon Salutation Code UNISEX

Address Last Date Modified 04/08/2014

Address 2 Date of Last Interaction

City Last Date Attempted

County Next To-do Date

Post Code

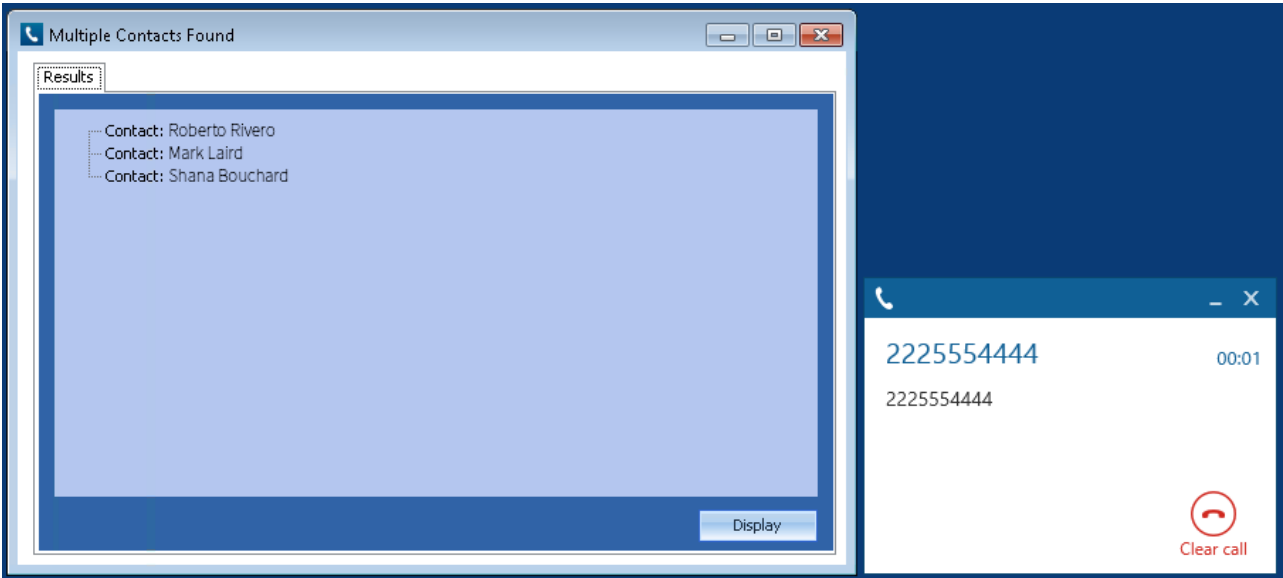
Lines

Communication

Phone No. 222 555 4444 E-Mail

Mobile Phone No. 777 444 1111 Home Page

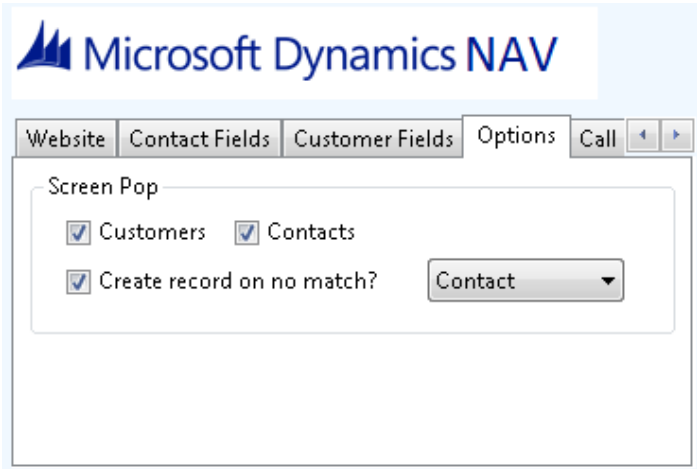
If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct card to be displayed. For example a call is made to 222555444 and this has found three matching *Contacts* that have this telephone number.



The correct entry can then be highlighted and then clicking on the *Display* button will open this card.

Entity and matching options

Configuration options are available on the plugin that allow the type of *cards* to be used in the searching to be set. For example it can be configured so that only the *Customer* or *Contact* Entities are searched. These options are set on the *Options* tab. Selecting the *Create record on no match?* will create and open a new card of the type that has been selected.



 If no match is found then no records will be displayed.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact* or *Customer* cards individually. By default the common telephone number fields are listed on the *Contact Fields* and *Customer Fields* tab. These are the default field names and may be different if they have been customized. Contact your Microsoft Dynamics NAV administrator for details.

Contacts

Field Description	Field name	Enabled?
Phone Number	Phone No_	
Mobile Phone Number	Mobile Phone No_	

Fax Number	Fax No_	
Telex Number	Telex No_	
Pager Number	Pager	

Customers

Field Description	Field name	Enabled?
Phone Number	Phone No_	

Telephone number formats

Microsoft Dynamics NAV does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

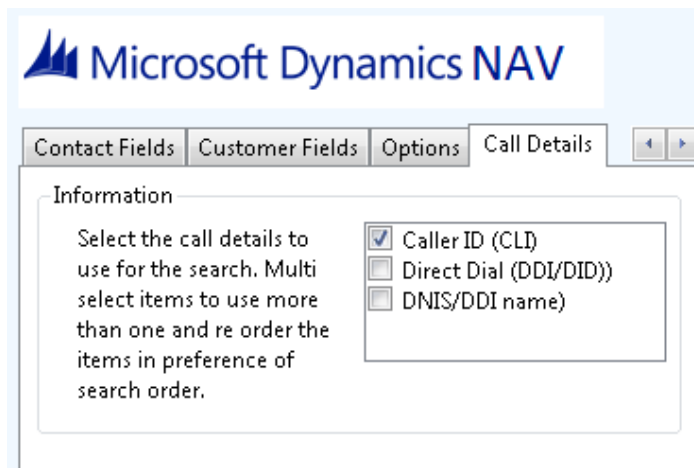
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Microsoft Dynamics NAV stores the country code and area code parts of each telephone number separately from the main number. From the *Formats* tab the country and area codes can be set to be appended to the telephone number when a search is made.

Call details

The call information that is used to search for matching records can be configured. By default the dialed number or the caller id are used to search with, depending on the call direction, but other call details can be configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.



 Caller ID represents either the caller ID for inbound calls or the dialed number for outbound calls.

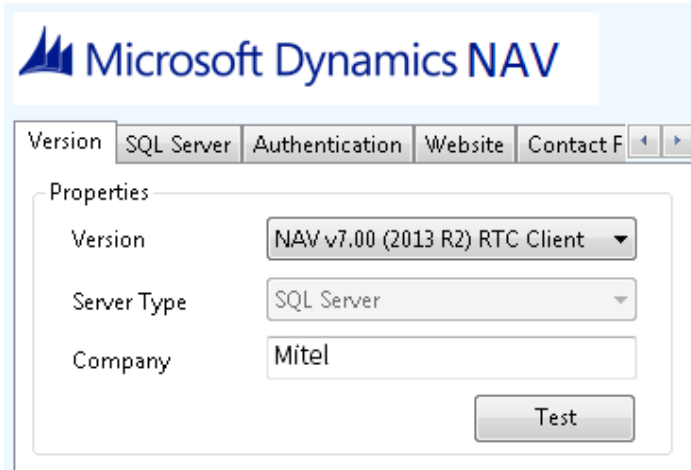
The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

 This field name must be the same with both *Contacts* and *Customers*.

Configuration

The integration needs to be configured for the correct version of Microsoft Dynamics NAV that is running.

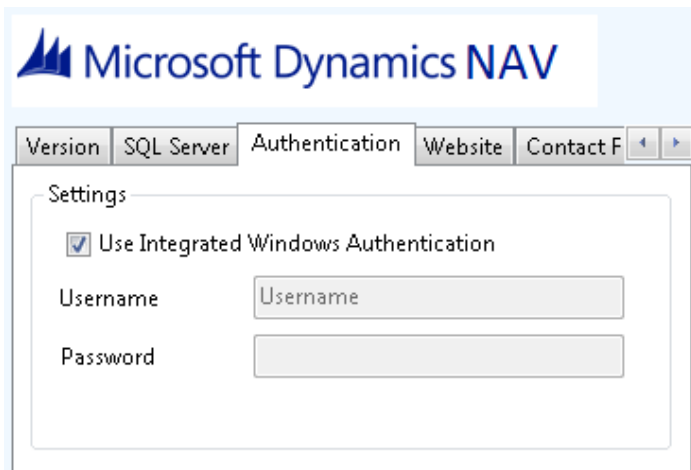


The screenshot shows the 'Microsoft Dynamics NAV' configuration window with the 'Version' tab selected. The 'Properties' section contains three fields: 'Version' (a dropdown menu showing 'NAV v7.00 (2013 R2) RTC Client'), 'Server Type' (a dropdown menu showing 'SQL Server'), and 'Company' (a text box containing 'Mitel'). A 'Test' button is located at the bottom right of the 'Properties' section. The window has a light blue header with the Microsoft Dynamics NAV logo.

From the *Version* tab select the relevant entry from the drop down list. Then select the correct *Server Type* for the type of NAV server that will be used, this can either be *SQL Server* or *Navision* and depends the on the version of the NAV selected.

Authentication

The *Authentication* tab enables the security credentials used to access Microsoft Dynamics NAV to be configured. Select the *Use Integrated Windows Authentication* option if the username, password and domain details from user who is logged on the computer will be used.



The screenshot shows the 'Microsoft Dynamics NAV' configuration window with the 'Authentication' tab selected. The 'Settings' section contains a checkbox labeled 'Use Integrated Windows Authentication' which is checked. Below this are two text boxes: 'Username' (containing 'Username') and 'Password' (empty). The window has a light blue header with the Microsoft Dynamics NAV logo.

Depending on the configuration of Microsoft Dynamics NAV and how it is accessed will determine what options are required. For example if a different user account is used to access NAV than what is currently logged into the computer then they will need to be manually entered.

SQL Server connection

If the *Server Type* has been configured as *SQL Server* then the connection details for the SQL Server needs to be entered.

The screenshot shows the 'Microsoft Dynamics NAV' window with the 'SQL Server' tab selected. The 'Settings' section contains three text boxes: 'Server Name' with the value 'navserver\NAVDEMO', 'Database Name' with 'Demo Database NAV (7-0)', and 'Server Address' with 'navserver:7046/DynamicsNAV70'.

The *Server Name* is the hostname of the SQL Server database, this should also contain any instance names if been used, for example:

- navserver\NAVDEMO

This will connect to the *NAVDEMO* database instance on the server with the hostname of *navserver*. This correct value for this can be found using the *Microsoft Dynamics NAV Administration* tool.

The screenshot shows the 'Microsoft Dynamics Nav Server - [Console Root\Microsoft Dynamics NAV (Local)\DynamicsNAV70]' window. The left pane shows a tree view with 'Console Root', 'Microsoft Dynamics NAV (Local)', and 'DynamicsNAV70'. The right pane shows the 'DynamicsNAV70 - (Running)' status and a 'General' tab with the following settings: 'Credential Type' (Windows), 'Database Instance' (NAVDEMO), 'Database Name' (Demo Database NAV (7-0)), 'Database Server' (NAVServer), and 'Data Cache Size' (0).

The *Database Name* option is the name of the SQL Server database to connect to and can also be found using the *Microsoft Dynamics NAV Administration* tool.

Web server

The *Website* tab enables the web server details to be configured for the Microsoft Dynamics NAV Web client connection.

The screenshot shows the 'Microsoft Dynamics NAV' window with the 'Website' tab selected. The 'NAV Webservice Details' section contains two text boxes: 'Server Name' with the value 'dynamicsnav2013' and 'Server Port' with '8080'. There is also a checkbox labeled 'Use HTTPS/SSL to connect' which is currently unchecked.

Enter the *Server Name* of the Microsoft Dynamics NAV web server and the *Server Port* to connect with, the default is 8080. If the connection to the web server is using a secure HTTP connection then check the *User HTTPS/SSL to connect* option.