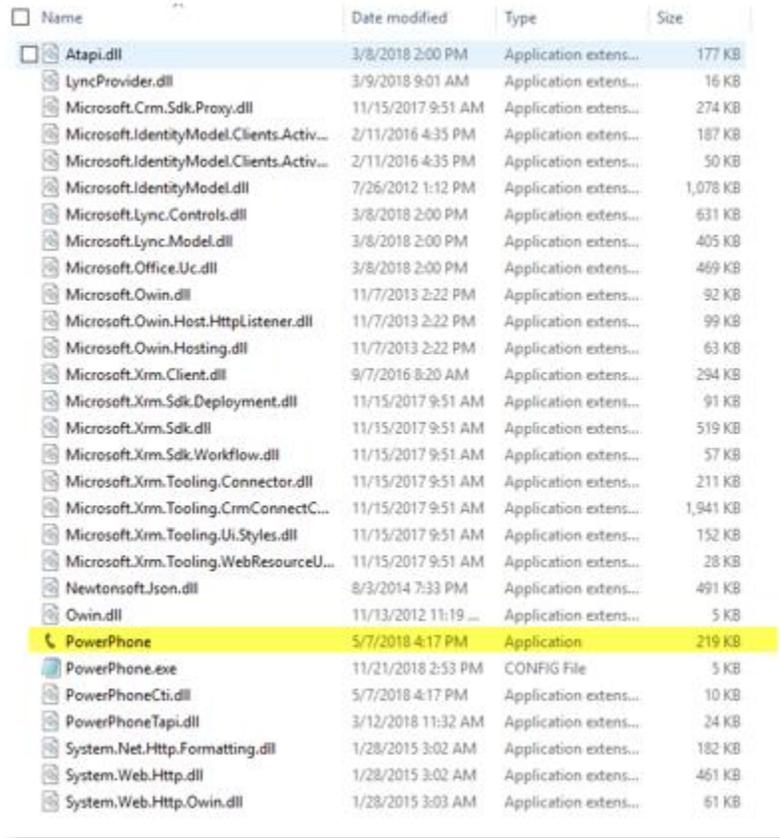


PowerPhone – Phone Agent Set up instructions.

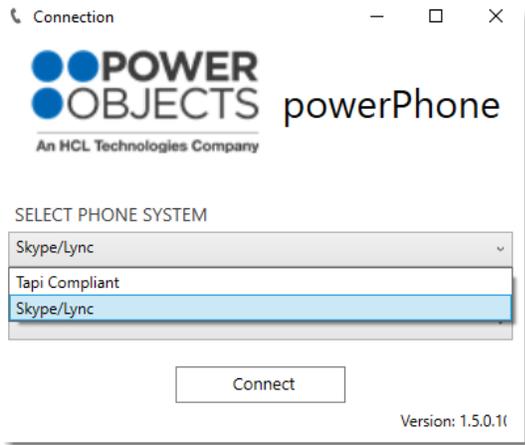
1. After Downloading the PowerPhone agent from the PowerPhone [website](#) you can locate the PowerPhone Agent on your machine, unzip the file, and then location and open the PowerPhone Application (highlighted in yellow).

** Note: You will need to have the PowerPhone solution and the TAPI Driver, (if using PowerPhone with a phone line) needs to be installed prior to setting up the PowerPhone agent.

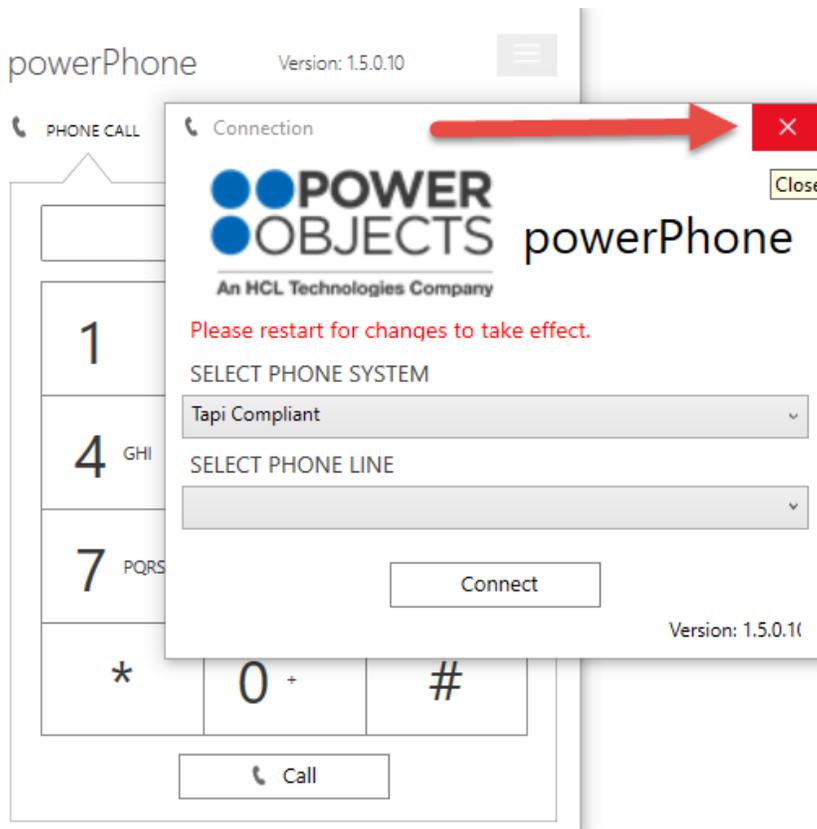


Name	Date modified	Type	Size
Atapi.dll	3/8/2018 2:00 PM	Application extens...	177 KB
LyncProvider.dll	3/9/2018 9:01 AM	Application extens...	16 KB
Microsoft.Crm.Sdk.Proxy.dll	11/15/2017 9:51 AM	Application extens...	274 KB
Microsoft.IdentityModel.Clients.Activ...	2/11/2016 4:35 PM	Application extens...	187 KB
Microsoft.IdentityModel.Clients.Activ...	2/11/2016 4:35 PM	Application extens...	50 KB
Microsoft.IdentityModel.dll	7/26/2012 1:12 PM	Application extens...	1,078 KB
Microsoft.Lync.Controls.dll	3/8/2018 2:00 PM	Application extens...	631 KB
Microsoft.Lync.Model.dll	3/8/2018 2:00 PM	Application extens...	405 KB
Microsoft.Office.Uc.dll	3/8/2018 2:00 PM	Application extens...	469 KB
Microsoft.Owin.dll	11/7/2013 2:22 PM	Application extens...	92 KB
Microsoft.Owin.Host.HttpListener.dll	11/7/2013 2:22 PM	Application extens...	99 KB
Microsoft.Owin.Hosting.dll	11/7/2013 2:22 PM	Application extens...	63 KB
Microsoft.Xrm.Client.dll	9/7/2016 8:20 AM	Application extens...	294 KB
Microsoft.Xrm.Sdk.Deployment.dll	11/15/2017 9:51 AM	Application extens...	91 KB
Microsoft.Xrm.Sdk.dll	11/15/2017 9:51 AM	Application extens...	519 KB
Microsoft.Xrm.Sdk.Workflow.dll	11/15/2017 9:51 AM	Application extens...	57 KB
Microsoft.Xrm.Tooling.Connector.dll	11/15/2017 9:51 AM	Application extens...	211 KB
Microsoft.Xrm.Tooling.CrmConnectC...	11/15/2017 9:51 AM	Application extens...	1,941 KB
Microsoft.Xrm.Tooling.Ui.Styles.dll	11/15/2017 9:51 AM	Application extens...	152 KB
Microsoft.Xrm.Tooling.WebResourceU...	11/15/2017 9:51 AM	Application extens...	28 KB
Newtonsoft.Json.dll	8/3/2014 7:33 PM	Application extens...	491 KB
Owin.dll	11/13/2012 11:19 ...	Application extens...	5 KB
PowerPhone	5/7/2018 4:17 PM	Application	219 KB
PowerPhone.exe	11/21/2018 2:53 PM	CONFIG File	5 KB
PowerPhoneCti.dll	5/7/2018 4:17 PM	Application extens...	10 KB
PowerPhoneTapi.dll	3/12/2018 11:32 AM	Application extens...	24 KB
System.Net.Http.Formatting.dll	1/28/2015 3:02 AM	Application extens...	182 KB
System.Web.Http.dll	1/28/2015 3:02 AM	Application extens...	461 KB
System.Web.Http.Owin.dll	1/28/2015 3:03 AM	Application extens...	61 KB

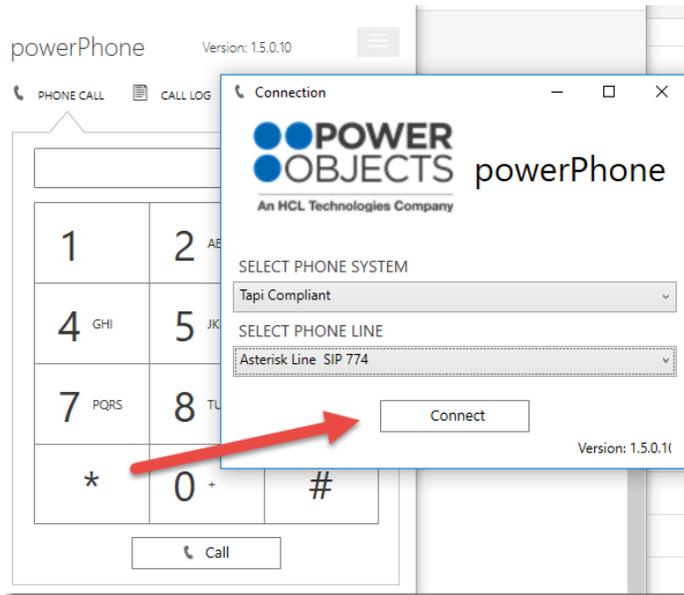
- Once you have opened the Phone Agent both the 'Select Phone System' and 'Select Phone Line' fields will be empty by default. Please use the dropdown menu in the first field to specify which type of phone system you would like to use, (TAPI is to connect to a TAPI driver on your computer, which connects to your VOIP phone system, and Skype is to connect to Skype for Business, if you use that to make/receive phone calls.)



- After selecting your preferred Phone System you will see a message stating, "Please restart for changes to take effect." At this point you will have to close the phone agent and then reopen it.



4. You will notice that after reopening the phone agent the dropdown menu for 'Select Phone Line' will now display your options for completing the Phone Agent set up. Now that you have selected your Phone System and Phone Line you can connect the PowerPhone Agent to your CRM environment by clicking 'Connect'



- When you click connect you will be asked to specify the 'Deployment Type. There are two options for both an on-premises CRM and Online CRM (Office 365). You will need to use the appropriate CRM credentials to connect the Phone Agent to your CRM environment. After you have successfully connected the Phone Agent to your CRM system you'll want to make sure to have it open when using PowerPhone to pop records for incoming calls, and when making outgoing calls from Dynamics 365.

Deployment Type: On-premises Office 365

Server: zachdemo.crm.powerobjects.net

Port: 443 Use SSL

Authentication Source: Active Directory

Use Default Credentials

User Name: [Redacted]

Password: [Redacted]

Domain: POWEROBJECTS

Display list of available organizations

Login Cancel

Deployment Type: On-premises Office 365

Display list of available organizations

Show Advanced

Advanced

Online Region: North America

User Name: [Redacted]

Password: [Redacted]

Login Cancel