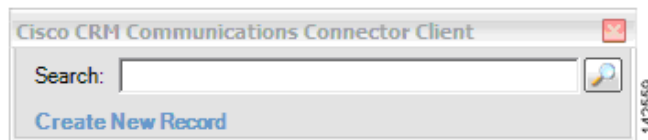




Using the Cisco Unified CallConnector for Microsoft Dynamics CRM Client

This chapter describes how use the Cisco Unified CallConnector for Microsoft Dynamics CRM Client. When the Client first starts up, it attempts to contact the Cisco Unified CallConnector for Microsoft Dynamics CRM Server Service. If successful, the Client's main window appears at the bottom-right corner of your window (see [Figure 44](#)).

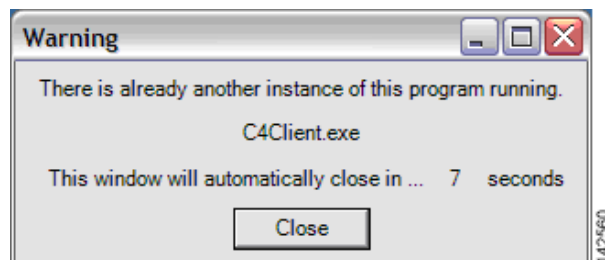
Figure 44 Client Main Window: Cisco Unified CallConnector for Microsoft Dynamics CRM



Note that the Client performs a “minimize on close.” If you click **Close** in the Cisco Unified CallConnector for Microsoft Dynamics CRM Client window, the Client will not exit, instead of minimizing itself to the tray (the tray icon is always visible, however). To exit the Client, right-click the menu and select **Exit**.

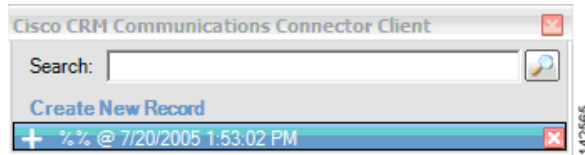
The Client is a single-instance application, meaning that only one copy of the application can be running at any one time. If you attempt to start a new Client while another is running, a warning message appears (see [Figure 45](#)).

Figure 45 Warning Message



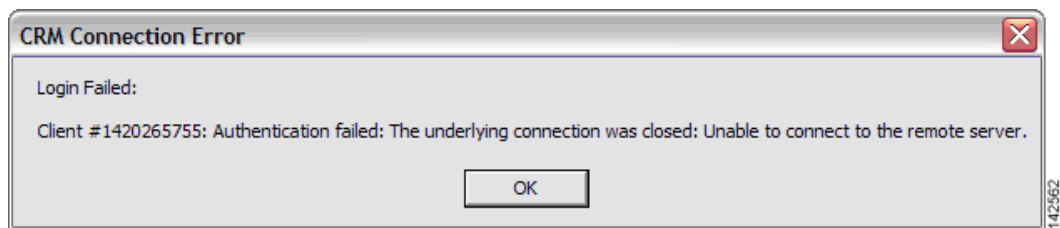
If the window is grayed out as shown in [Figure 46](#), the attempt to contact the server was unsuccessful, and you should receive an error message.

Figure 46 Client Grayed-Out Window: Cisco Unified CallConnector for Microsoft Dynamics CRM



One possible error message is shown in [Figure 47](#):

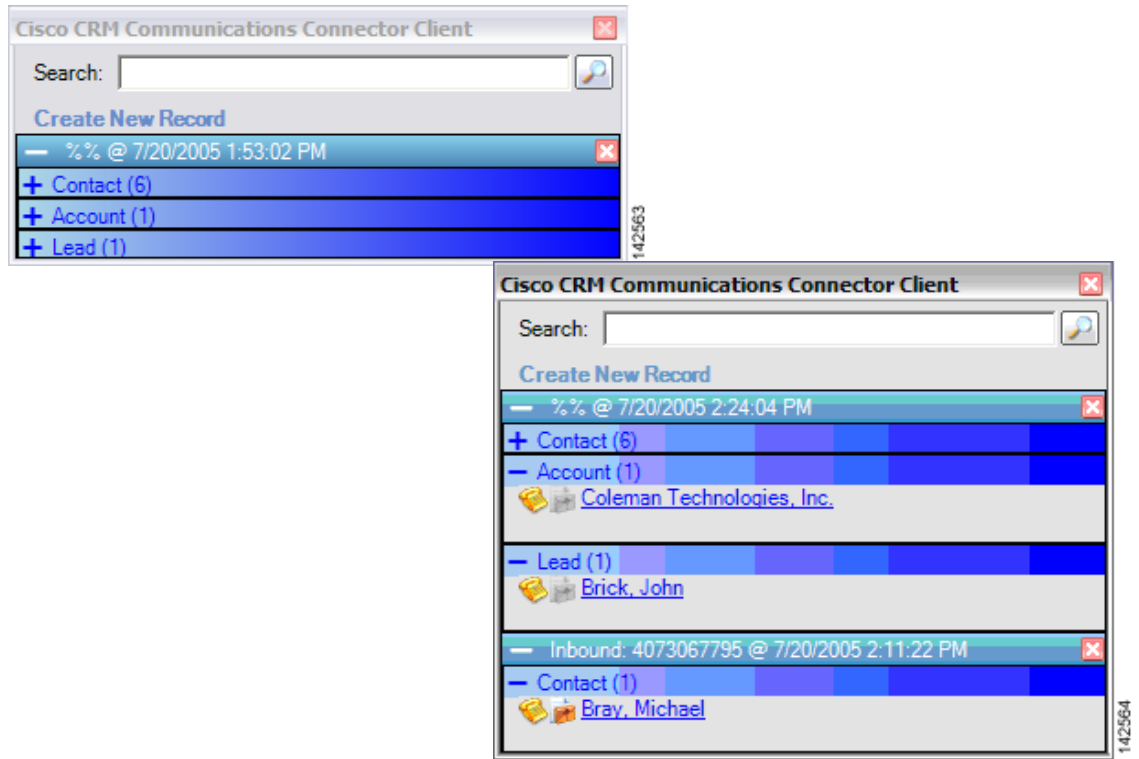
Figure 47 Error Message



In this case, the C4Server was successfully contacted, however the login was not successful (because the Cisco Unified CallConnector for Microsoft Dynamics CRM server could not be contacted by the Cisco Unified CallConnector for Microsoft Dynamics CRM server component).

To perform a manual search, type something in the search box and press Enter or click the search button at the right. The results display in collapsible panels, as shown in [Figure 48](#). If there is only one matching type of record, the panel displays in its expanded form. To expand or collapse a contact-type panel, click the blue horizontal bar that represents that contact type.

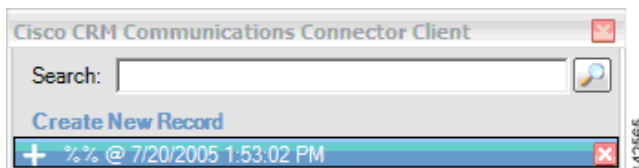
Figure 48 Client Window Performing Manual Search: Cisco Unified CallConnector for Microsoft Dynamics CRM



The Connector Client provides a multiple-search interface, which means that multiple search results can display at the same time. Each search result is also contained on a collapsible panel with a blue bar. Also note that the search collapsible panel has a close button—the red X at the right side of the search panel (not the window close button). To remove the search results for any specific search, click that panel’s close button.

A search window with one collapsed search panel is shown in [Figure 49](#):

Figure 49 Client Window: Cisco Unified CallConnector for Microsoft Dynamics CRM



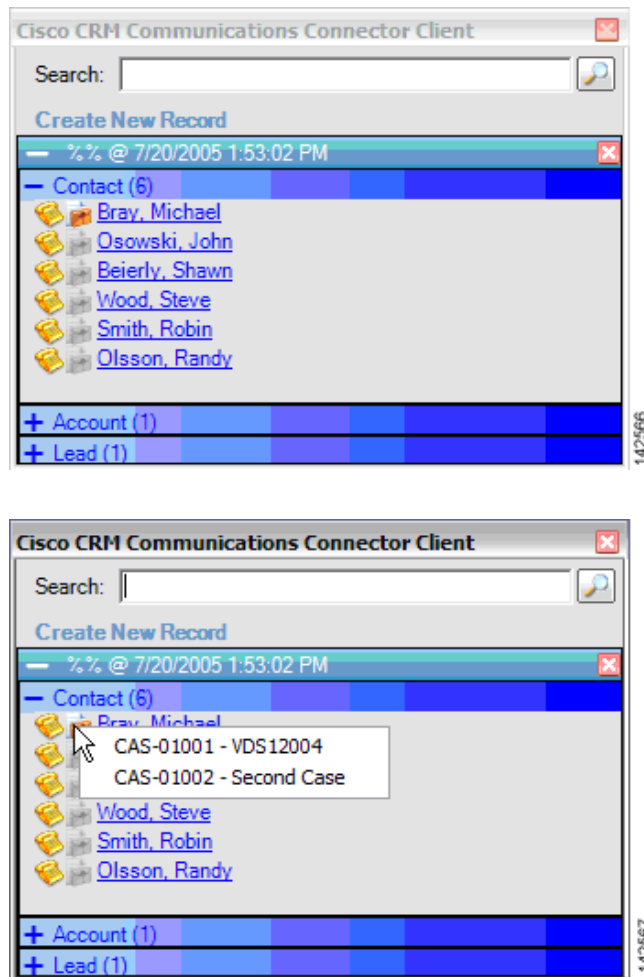
Inside each search panel are the results of the search. The example in [Figure 50](#) shows there are 6 Contacts, 1 Account, and 1 Lead that matched the search. The Contacts panel expands so that the results are visible.

Three hot spots are in each search-panel result. Click the telephone icon and the client creates a phone call activity record for that contact. If the search was initiated by a phone call, then the details of the phone call will automatically fill in.

If you click the briefcase icon, a menu showing the active support cases for that customer appears. Clicking one of the menu items opens a support case. If the briefcase icon is grayed out, then there are no support cases available for that contact, or the administrator did not configure the server to return information about support cases.

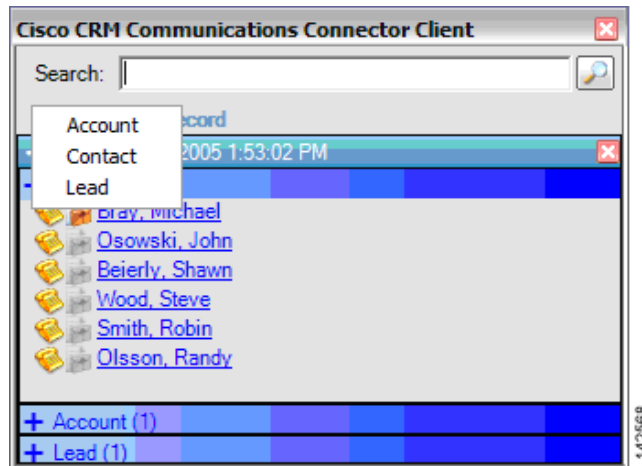
Finally, if you click a name, the contact record opens.

Figure 50 Client Contact Record Windows: Cisco Unified CallConnector for Microsoft Dynamics CRM



To create a new contact, account, or lead record, click **Create New Record** and select the type of record you want to create from the menu. Clicking one of the items opens a new blank record in the CRM Interface (see [Figure 51](#)).

Figure 51 Client Window—Select a New Record: Cisco Unified CallConnector for Microsoft Dynamics CRM



The client maintains an icon in the tray. The two possible icons are:



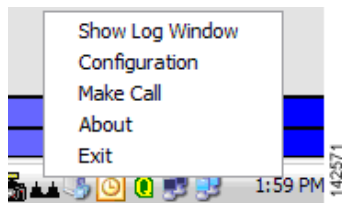
Client successfully contacted and logged in.



Client either could not contact the C4 server or could not log in.

Left-clicking these icons hides or displays the main client window. Right-clicking these icons displays the menu, as shown in Figure 52.

Figure 52 Hiding and Displaying the Main Client Window and Menu



The options are as follows:

- **Show/Hide Log Window**—Visible only if logging to a window is enabled. Shows or hides the log window.
- **Configuration**—Accesses the client configuration dialog.
- **Make Call**—Manually accesses the Make Call window.
- **About**—Displays client version and support information.
- **Exit**—Exits the client.

