Cisco Customer Relations Management Communications Connector 2.1.2 Overview

Cisco Unified CallConnector for Microsoft Dynamics CRM (formerly known as Cisco Unified CRM Communications Connector)—developed by Cisco Systems with the support of Microsoft Corporation—enables small- to medium-businesses (SMBs) and networked branch offices to deploy a more complete CRM solution by connecting Cisco IP Communications with the Microsoft Business Solution Customer Relationship Management (Microsoft CRM) application. Cisco CRM Communications Connector is an integrated solution that provides such features as click-to-dial and screen pops on incoming calls, allowing any staff member in an SMB to view customer account activity before they even answer the phone.

The Cisco CRM Communications Connector integrates Cisco IP Communications solutions with Microsoft CRM at the desktop, without requiring additional hardware. In addition, the Microsoft CRM client uses Microsoft Outlook or Internet Explorer as the primary client for managing tasks and contacts.

Cisco CRM Communications Connector is a client/server based application that is highly configurable and supports the following primary features in Cisco IP Telephony environments that are utilizing Microsoft CRM:

- Automatic detection and screen-pop searches of the CRM database for both incoming and outgoing phone calls

- Automatic creation of phone call activity records for incoming and outgoing calls with call duration tracking

- Click-to-dial from the Microsoft CRM user interface

- Multisite configuration capabilities with geographically correct dialing configurations per user

- Easily pop associated Microsoft CRM Customer Services cases

- Easy to use search system allows the user to search by name or phone number and have access to contact records and associated support cases

- Integration with Cisco Unified Communications Manager (formerly known as Cisco Unified CallManager), Cisco Unified Communications Manager Express (Cisco Unified CME, formerly known as Cisco Unified CallManager Express), and Cisco Unified IP Call Control Express (Cisco Unified IPCC Express).

These features allow CRM users to provide improved service by personalizing their interaction with callers. It also helps to enforce administrative policy for creating phone call activity records.

> **Note** For more information about Cisco IOS voice features, see the entire Cisco IOS Voice Configuration Library—including library preface and glossary, feature documents, and troubleshooting information—at http://www.cisco.com/univercd/cc/td/doc/product/software/ios123/123cgcr/voice_c/vcl.htm.

What to Do Next

You are now ready to download the required software to install Cisco CRM Communications Connector 2.1.2 (see the "Installing Cisco Customer Relations Management Communications Connector 2.1.2" section on page 11).