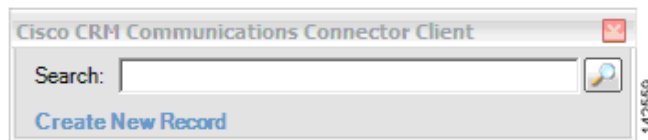# Using the Cisco CRM Communications Connector Client

This chapter describes how use the Cisco CRM Communications Connector Client.

When the Client first starts up, it attempts to contact the Cisco CRM Communications Connector Server Service. If successful, the Client's main window appears at the bottom-right corner of your screen (see Figure 60).

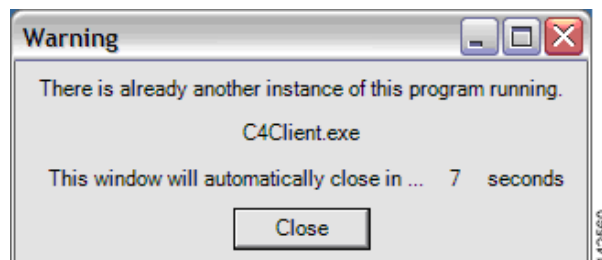*Figure 60*   *Cisco CRM Communications Connector Client Window*

Note that the Client performs a "minimize on close." If you click the **Close** button in the Cisco CRM Communications Connector Client window, the Client will not exit, but rather minimizes itself to the tray (the tray icon is always visible, however). To exit the Client, select **Exit** from the menu when right-clicking on the menu.

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 61).
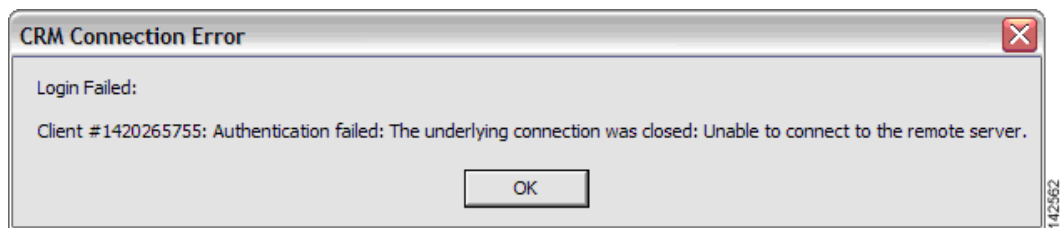
Figure 61   *Warning Message*

If the window is grayed out as shown in Figure 62, it means that the attempt to contact the server was unsuccessful, in which case you should receive an error message.

Figure 62   *Cisco CRM Communications Connector Client Grayed-Out Window*
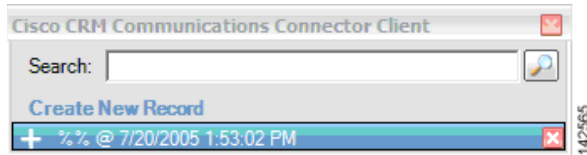
One such possible error message is shown in Figure 63:

Figure 63   *Error Message*

In this case, the C4Server was successfully contacted, but the login was not successful (because the CRM Server could not be contacted by the C4 Server).

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 64. 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 on the blue horizontal bar that represents that contact type.

Figure 64   Cisco CRM Communications Connector Client Window Performing Manual Search
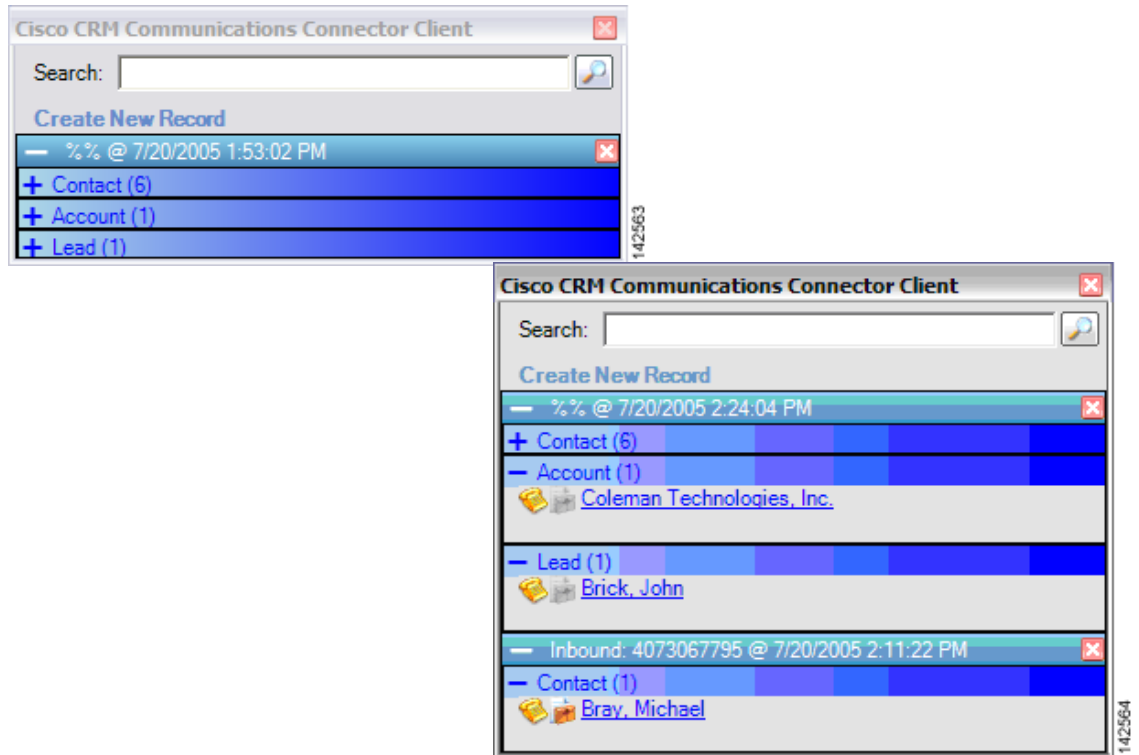
The Connector Client provides a multiple-search interface, which means that there can be multiple search results displayed at any one time. Each search result is also contained on a collapsible panel with a turquoise bar. Also note that the search collapsible panel has a 'close' button - the red X at the right side of the search panel (not the window close button). To remove the search results for any particular search, simply click that panel close button. A search window with one collapsed search panel is shown in Figure 65:

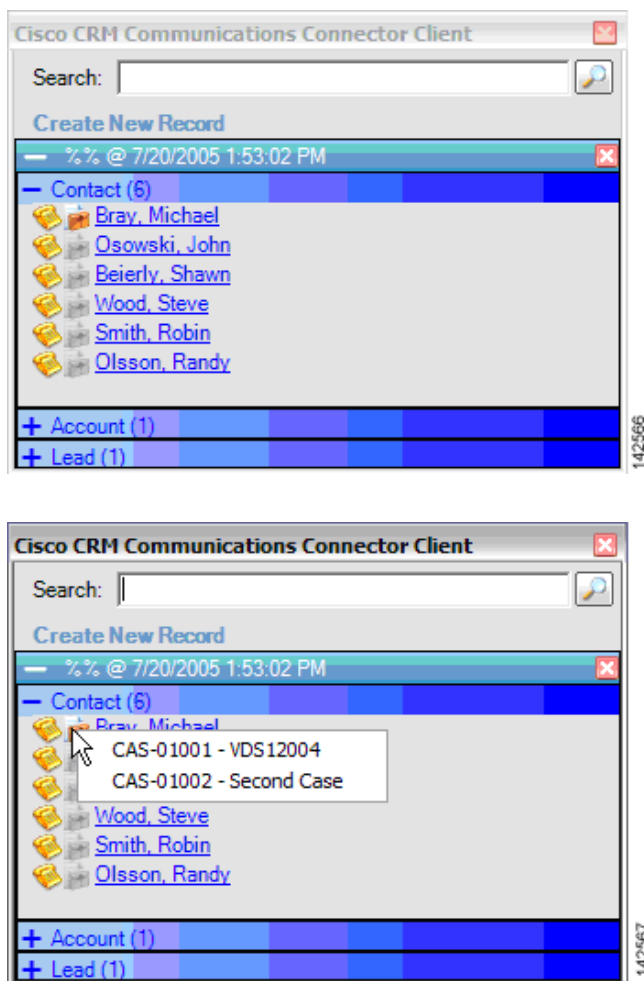*Figure 65   Cisco CRM Communications Connector Client Windows*
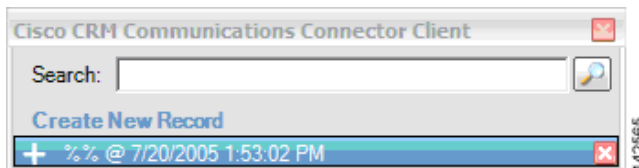
Inside each search panel will be the results of the search. The example in Figure 66 shows there are 6 Contacts, 1 Account, and 1 Lead that matched the search. The Contacts panel is expanded so that the results can be seen.

There are three hot spots in each search-panel results. 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. Click one of the support case. If the briefcase icon is grayed out, then there are no support cases available for that contact, or the administrator has not configured the server to return information about support cases.

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

Figure 66   Cisco CRM Communications Connector Client Windows

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 will open a new blank record in the CRM Interface.

Figure 67   Cisco CRM Communications Connector Client Window: Select a New Record
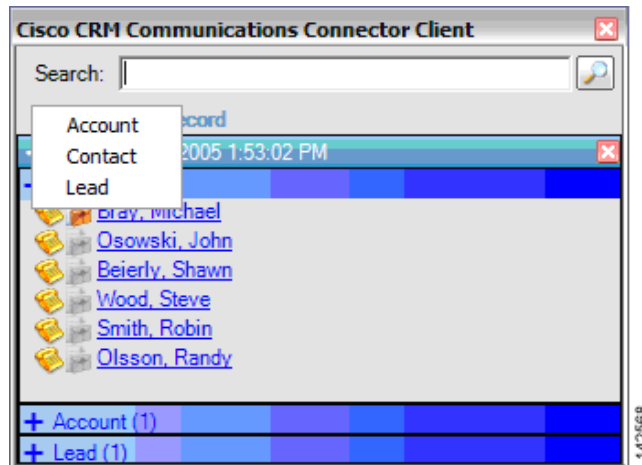
The client maintains an icon in the tray. The following are the two possible icons:
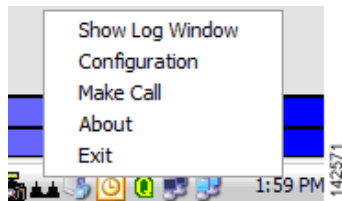
 Indicates that the client has successfully contacted and logged in.

 Indicates that the client either could not contact the C4 server or could not log in.

Left-clicking this icon hides/displays the main client window. Right-clicking the icon displays the menu as shown in Figure 68.

Figure 68   Hiding and Displaying the Main Client Window and Menu

The options are as follows:

- **Show/Hide Log Window**—Is 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.