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CRM Communications Connector Client Fails to Open a Contact Window for Incoming Calls

Document ID: 65013

Introduction

Prerequisites

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Introduction

This document describes one reason why the contact window for an incoming call fails to pop up on the Cisco Customer Relationship Management (CRM) Communications Connector Client workstation. This document also provides a solution.

Prerequisites

Requirements

Cisco recommends that you have knowledge of these topics:

- Cisco CallManager
- Cisco CallManager Express
- Microsoft CRM
- Cisco CRM Connector

Components Used

The information in this document is based on these software and hardware versions:

- Cisco CallManager version 3.3 or later
- Cisco CallManager Express
- Microsoft CRM version 1.2
- Cisco CRM Communications Connector version 2.0 and later

The information in this document was created from the devices in a specific lab environment. All of the devices used in this document started with a cleared (default) configuration. If your network is live, make sure that you understand the potential impact of any command.

Conventions

Refer to Cisco Technical Tips Conventions for more information on document conventions.

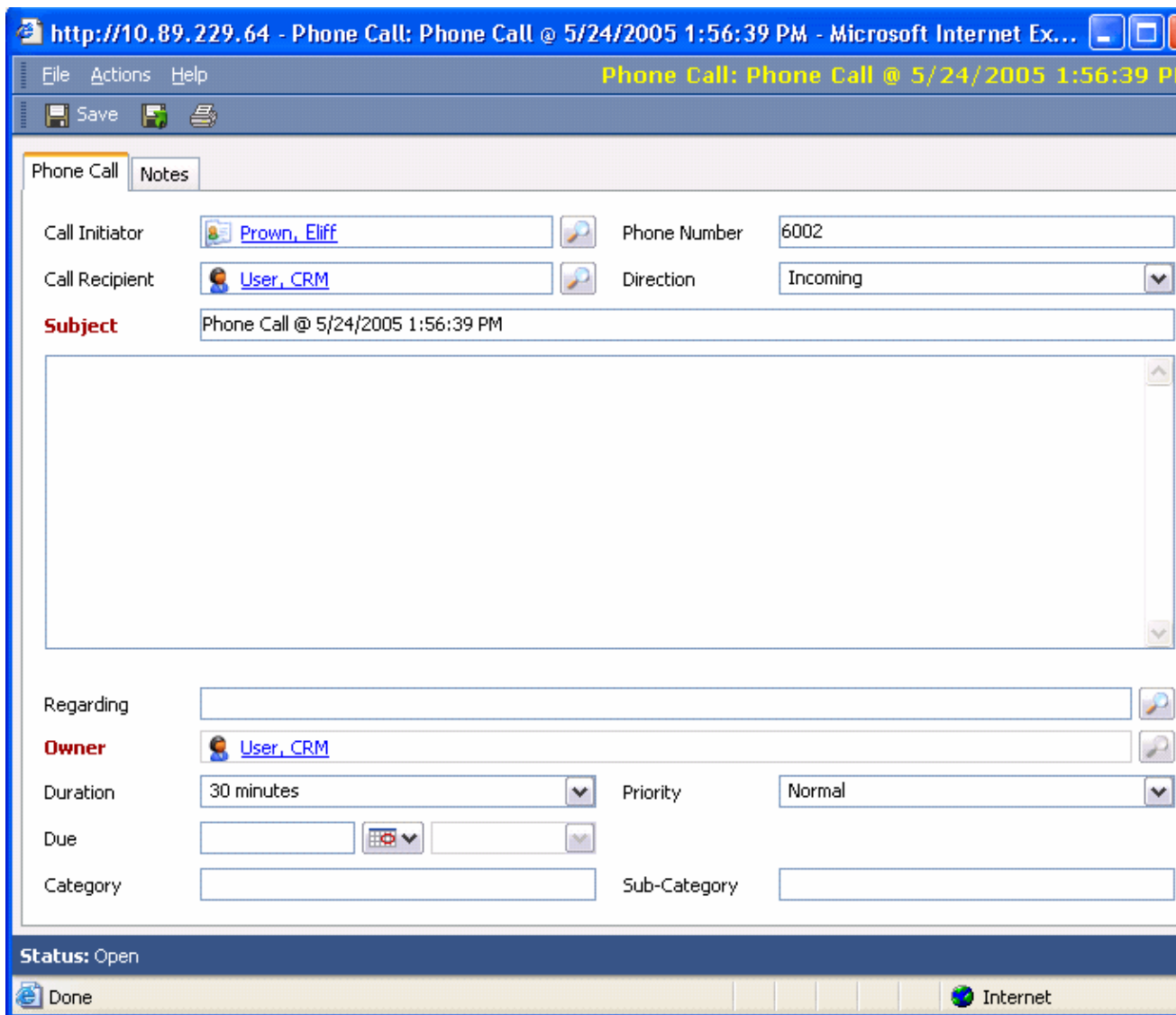
Problem

When a call comes in, or when a user makes an outbound call, Cisco CRM Connector must display the relevant record for the customer, account, or lead contact associated with the phone number. The record appears as a screen pop. Screen pops require the phone company to enable caller ID service on PRI or analog trunks. Here is the sequence for an incoming call screen pop:

1. A call arrives on Cisco CallManager (CM) or CallManager Express (CME) from the PSTN interface.
2. The call is directed to the IP Phone of the CRM user.
3. The caller ID appears on IP Phone, and is delivered through the CME Cisco Telephony Services Provider (TSP) to the CRM Communications Connector Client Internet Explorer Applet.
4. The CRM Communications Connector Client Applet passes the caller ID to the CRM Server for a user record lookup.
5. The CRM Server returns the possible matches to the Connector Client.
6. The CRM user can choose to open the contact record, create a new activity, perform a new search, or ignore the call.

The issue is that when an incoming call arrives, the contact window for the incoming call (as shown in Figure 1) does not open as a screen pop on the Cisco CRM Communications Connector Client. However, the relevant contact window opens when you place an outgoing call.

Figure 1 Cisco CRM Connector Incoming Call Initialization Screen Pop



Cause

This issue occurs when the value for `ProcessWhenCallAccepted` is set to **False** in the `CiscoCRMConnector.config` file. See the bold characters in this sample file:

```
<?xml version="1.0" encoding="utf-8"?>
<CiscoCRMConnector>
  <Logging Enabled="True">
    <LogFile>CiscoCRMConnector.log</LogFile>
    <Levels FunctionTracing="Off" ProgramOperation="Warnings"
  CRMOperation="Warnings" TAPIOperation="Warnings" />
  </Logging>
  <CRM Method="http" Server="10.89.229.64" Port="80"
  RelativeUrl="/CCCWebInterface/" />
  <TAPI AddExtraDebugInfo="False" UsingCME="False"
  ProcessWhenCallAccepted="False" AllowExtraOutboundLookup="True">
    <MonitorLine>Cisco Line: [SEP000A8A2C875F] (6000)</MonitorLine>
  </TAPI>
  <General PopOnExactMatch="True" UseSingleSignon="True"
  ProgramThreadingMode="PreLoadedAndStartedThreads" NumPreloadedThreads="3" />
</CiscoCRMConnector>
```

Solution

Complete these steps in order to solve this problem:

1. Open the **CiscoCRMConnector.config** file. This file resides in the C:\Program Files\Cisco Systems\Cisco CRM Connector directory
2. Set the value for ProcessWhenCallAccepted to **True**.
3. Save the changes to the file.

After you modify this value, the relevant screen pop appears on the CRM Communications Connector Client for all incoming calls.

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NetPro Discussion Forums – Featured Conversations for Customer Contact Software

IP Communications and Video: Contact Center

Related Information

- **Technical Support & Documentation – Cisco Systems**

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