



Release Notes for *Cisco Unified CRM Connector for Microsoft CRM, Oracle PeopleSoft, Salesforce.com, Release 1.1(1)*

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Introduction

Cisco Unified CRM Connector for Microsoft Dynamics CRM, Oracle PeopleSoft, Salesforce.com is a CTI application that integrates business applications with contact center channels managed by Cisco Unified Contact Center Enterprise/Hosted or Cisco Unified Intelligent Call Manager (ICM). The rest of this document discusses the features, technical information and caveats associated with the current release of this application.

This document is a supplement to the *Release Notes for Cisco Unified CRM Connector for Microsoft CRM, Oracle PeopleSoft, Salesforce.com, Release 1.0(0)*, available at:

http://www.cisco.com/en/US/products/ps9117/tsd_products_support_series_home.html

These Release Notes should be used in conjunction with the above Release Notes.



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Note

For the most up-to-date version of these release notes, go to the Cisco Web page:
http://www.cisco.com/en/US/products/ps9117/tsd_products_support_series_home.html

System Requirements

For hardware and third-party software specifications, refer to the *Hardware and System Software Specification (Bill of Materials): Cisco ICM/IPCC Enterprise & Hosted Edition*, which is accessible from

http://www.cisco.com/en/US/products/sw/custcosw/ps1001/products_user_guide_list.html

Related Documentation

- Documentation for Cisco Unified CRM Connector is accessible from http://www.cisco.com/en/US/products/ps9117/tsd_products_support_series_home.html
- For additional information on Cisco Unified ICM and Unified Contact Center Enterprise and Hosted, see **Voice and Unified Communications > Cisco Unified Contact Center Products** at <http://www.cisco.com/web/psa/products/index.html>
- Technical Support documentation and tools can be accessed from <http://www.cisco.com/en/US/support/index.html>
- The Product Alert tool can be accessed through <http://www.cisco.com/cgi-bin/Support/FieldNoticeTool/field-notice>

New and Changed Information

The following sections describe new features and changes that are pertinent to this release.

- [Overview, page 2](#)
- [User Documentation, page 3](#)

Overview

Detailed information on Cisco Unified CRM Connector for Microsoft CRM, Oracle PeopleSoft, Salesforce.com can be found in the documentation set, which is discussed in [User Documentation, page 3](#).

This release includes significant enhancements to the Microsoft Dynamics CRM connector and general maintenance fixes for other components: the Cisco Connector Server core modules and the Cisco Connector. There are no fixes or enhancements for the PeopleSoft or Salesforce CRM Connectors.

The Microsoft Dynamics Connector has been enhanced to support both release 3.0 and 4.0 of Microsoft Dynamics CRM. It supports the new multi-language feature of MS CRM 4.0. There are minor improvements to the administration and agent user interfaces. Customers installing on Microsoft Dynamics CRM 3.0 now and later upgrade to release 4.0 may use this adapter. They may choose to modify the adapter's configuration on the upgraded system to be compliant with the 4.0 certifications.

The Cisco Salesforce Connector has been validated for the Summer 2008 release.

There are no significant changes to the Cisco Connector Server core modules, only maintenance bug fixes noted below.

There are no major changes to the Cisco Connector; however the DLL for this module has been renamed.

User Documentation

This section briefly describes the Cisco CRM Connector documentation set.

- *Cisco Unified CRM Connector Implementation and Administration Guide for Microsoft CRM, Oracle PeopleSoft, Salesforce.com*—describes how to install, configure and administer the application.
- *Cisco Adapter for Microsoft CRM User's Guide*—explains how to use the Cisco Contact Center “add-in” for Microsoft Dynamics CRM.

Important Notes

The following sections contain important information, restrictions and requirements that apply to Cisco Unified CRM Connector for Microsoft CRM, Oracle PeopleSoft, Salesforce.com, Release 1.1(1).

- [Cisco Connector, page 3](#)
- [Cisco Connector Server Core Modules, page 3](#)
- [.NET Adapter, page 4](#)
- [Cisco Unified CRM Connector for PeopleSoft Adapter, page 4](#)
- [Cisco Unified CRM Connector for Salesforce.com Adapter, page 4](#)
- [Cisco Unified CRM Connector for Microsoft Dynamics CRM Adapter, page 4](#)
- [Port Utilization Information, page 5](#)
- [Limitations, page 6](#)
- [Permanent licenses are not displayed immediately after adding them using the Admin tool, page 6](#)
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Cisco Connector

The name of the Cisco connector DLL has changed. The new name for the connector is “Cisco_CTI.DLL”.

In the previous release, outbound dials to external phone numbers were cleared in some environments. This has been fixed.

In the previous release, the last ECC value was not saved or processed. This has been fixed.

Cisco Connector Server Core Modules

License controls have been improved and made more reliable.

In the previous release, Event Manager did not properly handle two simultaneous unsolicited events. This has been fixed.

.NET Adapter

In the previous release, Call Attached Data (CAD) was not properly passed through the .NET SOAP Adapter. This has been fixed.

Cisco Unified CRM Connector for PeopleSoft Adapter

There are no changes to the PeopleSoft adapter for Release 1.1(1).

Cisco Unified CRM Connector for Salesforce.com Adapter

Release 1.1(1) has been validated for Salesforce.com releases through and including Summer 2008.

Cisco Unified CRM Connector for Microsoft Dynamics CRM Adapter

The Microsoft CRM Adapter has been enhanced to support release 3.0 and release 4.0 of Microsoft Dynamics CRM. It includes the following functional enhancements:

When installed on Microsoft Dynamics CRM Release 4.0 it supports multi-language when the following language packs are installed for MS Dynamics:

- English
- Spanish
- French
- Russian
- Simplified Chinese

The color layout matches the Microsoft Dynamics CRM Release 4.0 color scheme.

The Favorites drop down selection has been updated:

- It now shows contact name first and contact phone number second.
- It now sorts in alphabetical order by contact name rather than numerical order by phone number.
- Global and personal Favorites are divided into separate sections.

Recent contacts are now maintained in a database and can be searched on contact date and time.

The directory search has been enabled. This allows agents to search MS CRM accounts, contacts and employees for contact information. Agents may select from one or more phone numbers to contact an existing account, contact or a fellow employee.

The adapter may be configured to support SDK endpoints for Microsoft CRM 3.0 or Microsoft CRM 4.0.

- When installing on Microsoft CRM 3.0 the adapter must be configured to support release 3.0.
- When installing on Microsoft Dynamics CRM 4.0, the adapter may be configured to support either release 3.0 or release 4.0. To match the Microsoft Dynamics CRM 4.0 certification, the adapter must be configured for release 4.0, however both should function properly.

Upgrading from Microsoft Dynamics CRM 3.0 to Microsoft Dynamics 4.0 after installing the Cisco Connector for Microsoft Dynamics CRM Adapter:

- If you install the adapter against Microsoft Dynamics CRM 3.0 and later upgrade your Microsoft CRM to release 4.0 you do not need to make any changes. The adapter will work properly as originally implemented.
- You may wish to reconfigure the adapter configuration so that it matches the certified configuration for Microsoft CRM 4.0. You do not need to upgrade any installed adapter components, you need to make these configuration changes:
 - Change the mscrmVersion value from 3.0 to 4.0 in the web.config file in the adapter root directory.
 - Change the mscrmVersion value from 3.0 to 4.0 in the web.config file in the adapter's AMC_Settings sub-directory.
 - Change the mscrmVersion value from 3.0 to 4.0 in the web.config file in the adapter's Search sub-directory.
 - Set the mscrmVersion by modifying this key as follows:
`<add key="mscrmVersion" value="4.0"></add>`

Port Utilization Information

The following information would normally be found in the *Port Utilization Guide for Cisco ICM/IPCC Enterprise and Hosted Editions* manual. It will eventually be placed there, but for expediency it is currently included here. The port values given are the default values, which can be configured as noted.

:

Server or Application Protocol	Server Protocol/Port	Remote Protocol/Port	Remote Device	Notes
CRM Connector Server	TCP 80		.NET Adapter, Administration Tool	“Default Web Site” in IIS Manager.
MSCRM Server	TCP 81		MSCRM Client	MSCRM only.
CRM Connector Server	TCP 5666		CRM Adapters	Configurable in \Program Files\Cisco\CRM Connector\MCIS\Config.ini
.NET Adapter	TCP 5558		Agent Desktop	Remoting Port.
CRM Connector Server	TCP 42027		Cisco CTI Server	Default port for side A. Configurable in the Config.ini file [CTIModule Setting] Port_A.
CRM Connector Server	TCP 44027		Cisco CTI Server	Default port for side B. Configurable in the Config.ini file [CTIModule Setting] Port_B.
CRM Connector Server	TCP 65372		Server Administration Tool	Configurable under \Program Files\Cisco\CRM Connector\MCIS\Config.ini and \Program Files\Cisco\CRM Connector\ Server Administration Tool\WebComponent\ server.config

Limitations

- Silent Monitoring is only available through Unified Communications Manager 6.0 and later.
- Supervisor Mode is not supported.
- Outbound Option is not supported.
- Mobile Agent is not supported.

Permanent licenses are not displayed immediately after adding them using the Admin tool

During the configuration of licenses, the Admin tool defaults to showing the temporary license instead of the licenses that were configured as permanent licenses. This could create confusion as users cannot tell, from the Admin tool, that they have properly configured the licenses. The Admin tool does display the permanent licenses, but only after the temporary licenses have expired.

Status Bar and Unified CRM Connector Server Restart

When using the Admin tool to Restart the Unified CRM Connector server, the status page does not remain until the server restart completes. It may show incorrect or incompleted status in the Admin tool. If the Admin tool shows stop (red) or incorrect (yellow) status with further change after restart, click the Start button to start the Unified CRM Connector server.

As a workaround to this problem, do not use Restart. Instead, use the Stop button to stop the Unified CRM Connector server. Then click the Start button to start the server.

Resolved Caveats in This Release

In general, you can find the latest resolved caveat information through Bug Toolkit, which is an online tool that is available for customers to query defects according to their own needs.



Tips

You need an account with Cisco.com (Cisco Connection Online) to use the Bug Toolkit to find open and resolved caveats of any severity for any release.

To access the Bug Toolkit, log onto

<http://tools.cisco.com/Support/BugToolKit/action.do?hdnAction=searchBugs>

Using Bug Toolkit

To access Bug Toolkit, you need the following items:

- Internet connection
- Web browser

- Cisco.com user ID and password

To use the Software Bug Toolkit, follow these steps:

Procedure

-
- Step 1** To access the Bug Toolkit, go to <http://tools.cisco.com/Support/BugToolKit/action.do?hdnAction=searchBugs>
- Step 2** Log in with your Cisco.com user ID and password.
- Step 3** To look for information about a specific problem, enter the bug ID number in the “Search for Bug ID” field then, click **Go**.
- For information about how to search for bugs, create saved searches, create bug groups, and so on, click **Help** in the Bug Toolkit window.

Open Caveats in This Release

This section contains a list of defects that are currently pending in Cisco Unified CRM Connector for Microsoft CRM, Oracle PeopleSoft, Salesforce.com, Release 1.1(1). Defects are listed by component and then by identifier.



Note

Because defect status continually changes, be aware that the following table reflects a snapshot of the defects that were open at the time this report was compiled. For an updated view of open defects, access Bug Toolkit and follow the instructions as described in [Using Bug Toolkit, page 6](#).

Table 1 Open Caveats for Cisco Unified CRM Connector for Microsoft CRM, Oracle PeopleSoft, Salesforce.com, Release 1.1(1)

Identifier	Component	Headline
CSCso00557	crm-amc	Permanent licenses are not displayed adding them using the Admin tool.
CSCso00572	crm-amc	Status bar for CRM Connector Server Restart not staying on the display

Obtaining Documentation, Obtaining Support, and Security Guidelines

For information on obtaining documentation, obtaining support, providing documentation feedback, security guidelines, and also recommended aliases and general Cisco documents, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

<http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>

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