How to configure caller recognition and screen-pop for:

AFAS Online

Supported versions: AFAS Online
Contact replication method: AFAS Online AppConnector webservice
Screen pop method: AFAS InSite Url

Prerequisites

AFAS AppConnector webservice

The contact replication service for AFAS Online uses the AFAS Online webservice to replicate data for customer recognition.

It's required to configure a standard GetConnector "CTI_Export", then link the GetConnector to an App connector and then call this via the REST webservices using a XML 'token'.
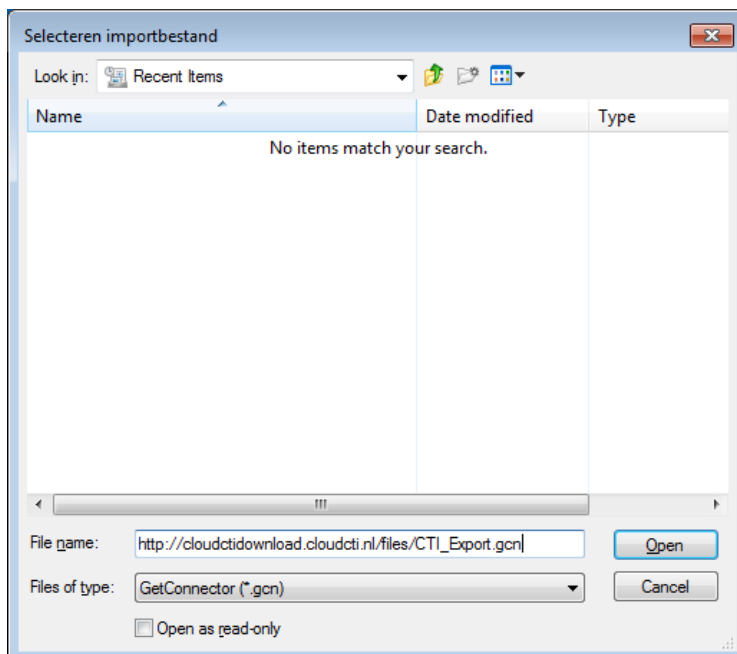
Import the GetConnector

Access AFAS Profit via the remote desktop RDP client using an AFAS Online administrator account.

In AFAS Profit, go to "Algemeen > Uitvoer > Beheer > GetConnector" to open the GetConnector settings.

Select "Importeren".

Download and import the GetConnector "CTI_Export" from

https://downloadcloudcti.blob.core.windows.net/files/CTI_Export.gcn

Press "Voltooien" to complete. The "CTI_Export" connector will now be listed.

Link the GetConnector to an App connector

To call the "CTI_Export " connector via the REST webservices, it is required to configure an App connector. The instructions for creating an App connector can be found via the AFAS knowledge base (https://klant.afas.nl/appconnector)

https://help.afas.nl/help/EN/SE/App_Apps_Custom_Add.htm?query=create%20appconnector

Create a token

To use the App connector, create a token manually as described at the AFAS Knowledge base

https://help.afas.nl/help/NL/SE/120718.htm

The token has an XML format e.g.
"<token><version>1</version><data>10546BF56D3C4F0297C13EL8EE91201B3CA8BEC94CE94
E4738031AB7CA3E722C</data></token>"

Your participant number and token are required to configure the connection to AFAS Online.

AFAS InSite

The screen pop functionality opens contact information in the AFAS InSite web application.

Make sure that your AFAS InSite is configured correctly as described at the AFAS Knowledge base:

https://help.afas.nl/help/EN/SE/Ins_Config_Instal_AOL.htm

Notes

Outbound dialing is enabled by default. Just click on a telephone number hyperlink

Organisatie

Naam	AFAS Software
Aantal medewerkers	250 of meer

Communicatiegegevens

Adres	Philipsstraat 9, 3833 LC LEUSDEN
Postadres	Postbus 310, 3830 AJ LEUSDEN
E-mail	info@afas.nl
Telefoonnr.	033-4341800
Fax	
Homepage	www.afas.nl

At first run, the user's approval might be required. Uncheck the option "Always ask…" and press "Allow"
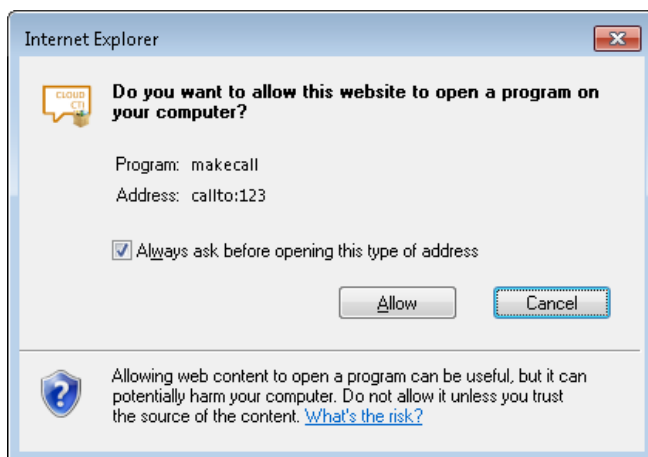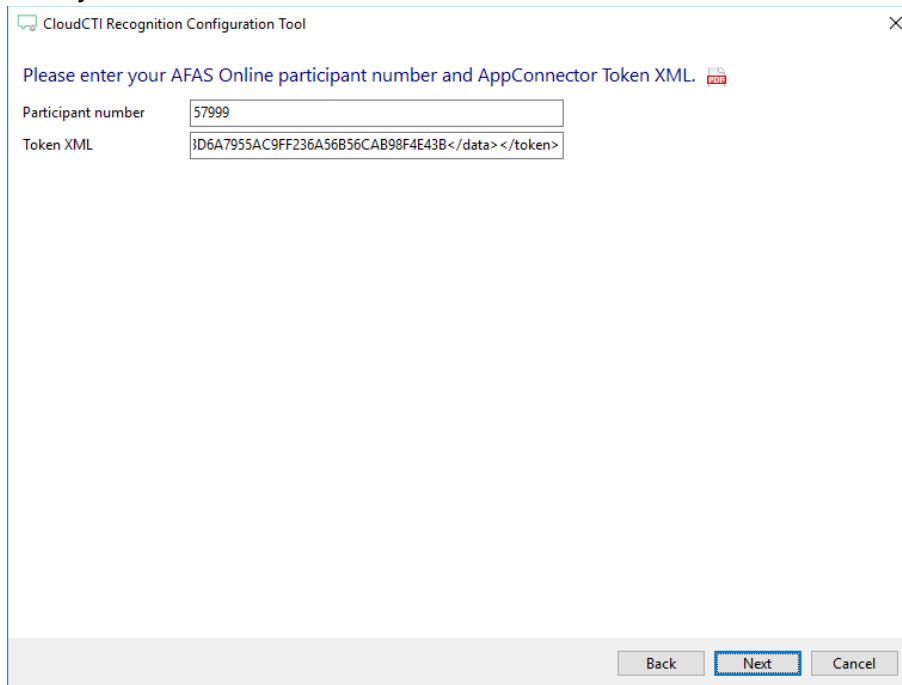
Configuration steps

1)   Start by clicking 'add recognition' in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'AFAS Online', as shown below.
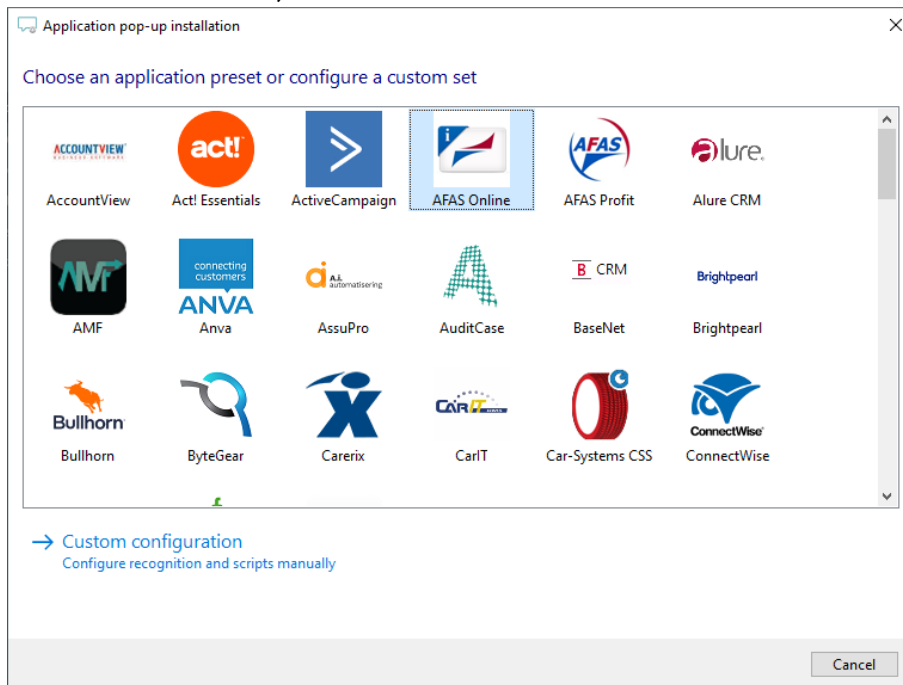
2) Enter your AFAS Online participant number and App connector token to access the data from your account. Click 'next' to continue

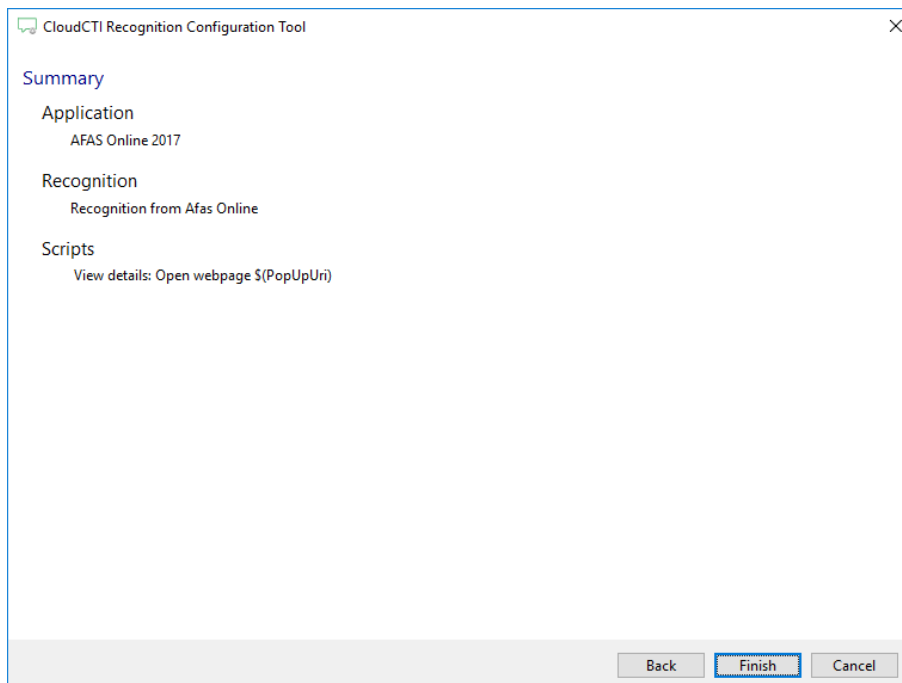CloudCTI Recognition Configuration Tool ☐ ✕

Please enter your AFAS Online participant number and AppConnector Token XML. 📄

Participant number	57999
Token XML	3D6A7955AC9FF236A56B56CAB98F4E43B</data></token>

Back   Next   Cancel

3) Check the configuration summary and click finish to add the recognition from AFAS Online

CloudCTI Recognition Configuration Tool ☐ ✕

Summary

Application
AFAS Online 2017

Recognition
Recognition from Afas Online

Scripts
View details: Open webpage $(PopUpUri)

Back   Finish   Cancel