

How to configure caller recognition and screen-pop for:

AFAS Profit

Supported versions: AFAS Profit 11 and up

Contact replication method: AFAS Profit AppConnector webservice

Screen pop method: AFAS InSite Url

Prerequisites

AFAS AppConnector webservice

The contact replication service for AFAS Profit uses the AFAS Profit 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

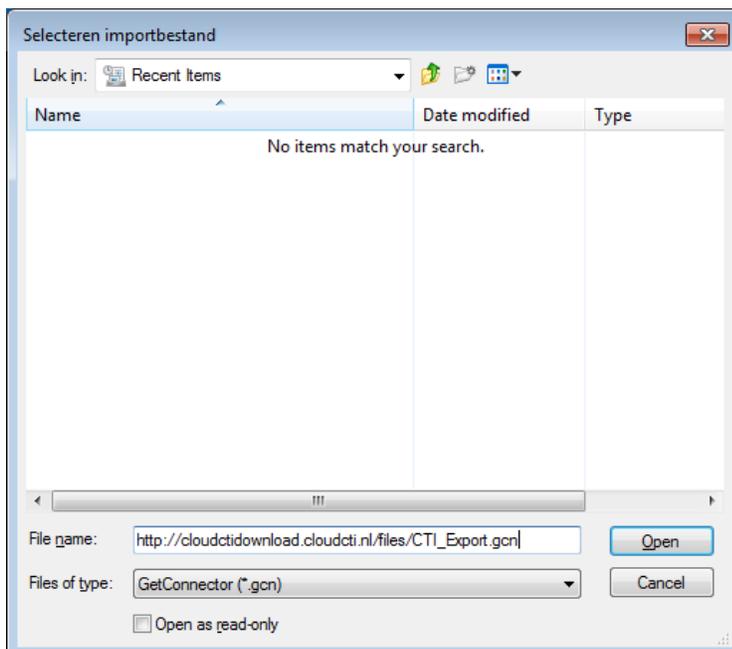
Access AFAS Profit via the remote desktop RDP client using an AFAS Profit administrator account.

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 webservice, 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>10546BF56D3C4F0297C13EL8EE91201B3CA8BEC94CE94E4738031AB7CA3E722C</data></token>"
```

AFAS InSite

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

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

Your AFAS Profit webservice URL, AFAS InSite URL and token are required to configure the connection to your AFAS Profit installation.

Notes

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

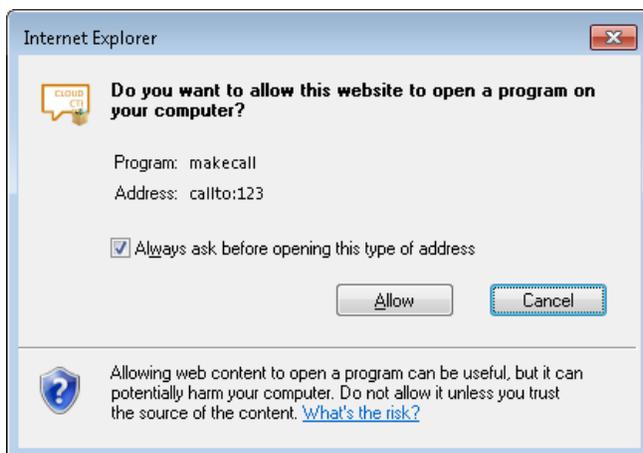
Organisatie

Naam AFAS Software
Aantal medewerkers 250 of meer

Communicatiegegevens

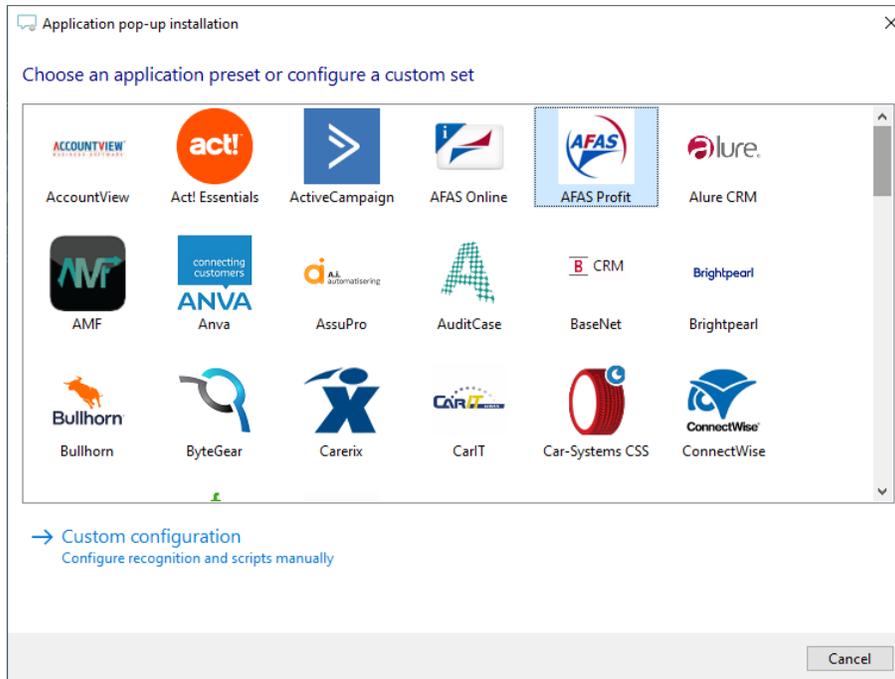
Adres Philipsstraat 9, 3833 LC LEUSDEN
Postadres Postbus 310, 3830 AJ LEUSDEN
E-mail info@afas.nl
Telefoonnr. [033-4341900](tel:033-4341900)
Fax
Homepage www.afas.nl

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

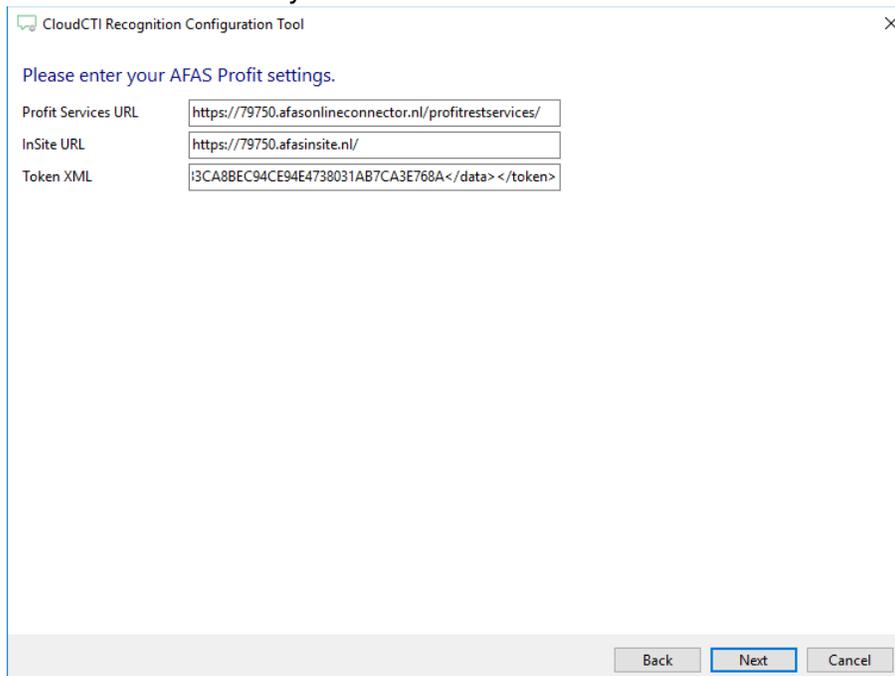


Configuration steps

- 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 Profit', as shown below.



- 2) Enter your AFAS Profit Webservices URL, AFAS InSite URL and App connector token to access the data from your account. Click 'next' to continue



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

