CRM INFO

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

Selecteren im	portbestand		X
Look in: 📱	Recent Items -	彦 🗈 🛄◄	
Name	*	Date modified	Туре
	No items match yo	ur search.	
•	III		۰.
File <u>n</u> ame:	http://cloudctidownload.cloudcti.nl/files/CTI_Export.gcn		
Files of type:	GetConnector (*.gcn) Cancel		
	Open as read-only		

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>"

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

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Naam Aantal medewerkers	AFAS Software 250 of meer
Communicatiegegevens	
Adres	Philipsstraat 9, 3833 LC LEUSDEN
Postadres	Postbus 310, 3830 AJ LEUSDEN
E-mail	info@afas.nl
Telefoonnr.	<u>033-4341800</u>
Fax	47)
Homepage	www.afas.nl

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

Internet Explorer	
CLOUD CLOUD	Do you want to allow this website to open a program on your computer?
	Program: makecall
	Address: callto:123
	Always ask before opening this type of address
	Allow Cancel
?	Allowing web content to open a program can be useful, but it can potentially harm your computer. Do not allow it unless you trust the source of the content. <u>What's the risk?</u>



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

🧔 CloudCTI Recogniti	ion Configuration Tool	×
Please enter your	AFAS Profit settings.	
Profit Services URL	https://79750.afasonlineconnector.nl/profitrestservices/	
InSite URL	https://79750.afasinsite.nl/	
Token XML	l3CA8BEC94CE94E4738031AB7CA3E768A	
		Back Next Cancel

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



💭 CloudCTI Recognition Configuration Tool	×
Summary	
Application	
AFAS Profit 2017	
Recognition	
Recognition from Afas Profit	
Scripts	
View details: Open webpage \$(PopUpUri)	
	Back Finish Cancel