

How to configure caller recognition and screen-pop for:

AMF

Supported versions:

Contact replication method: CSV TXT export

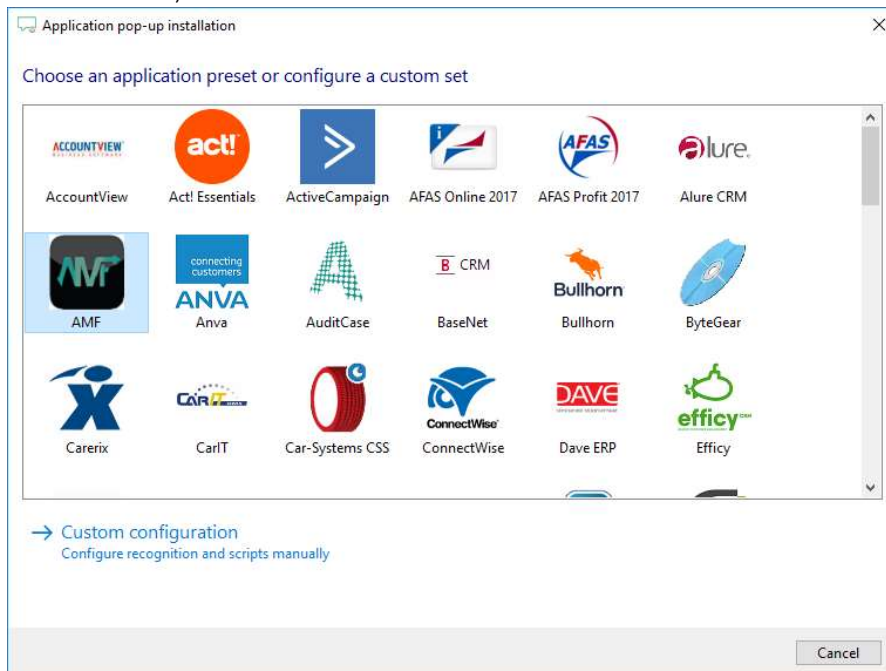
Screen pop method: URL

Prerequisites

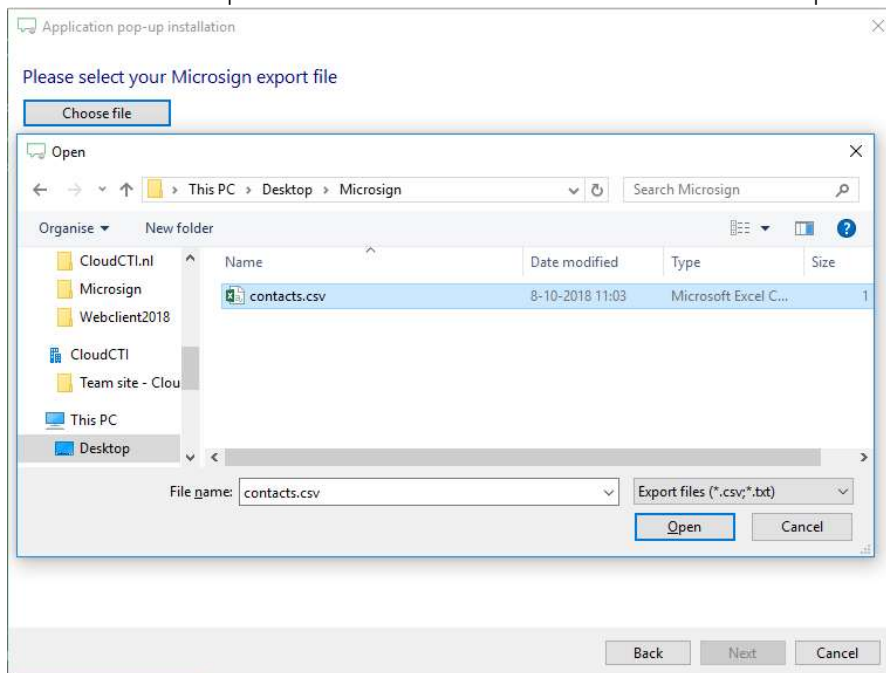
The required CSV file can't be generated automatically. This must be configured by AMF in the AMF Export service. Please contact AMF to set this up. Required fields in the CSV file are relatiecode, name and phone number fields.

Configuration steps

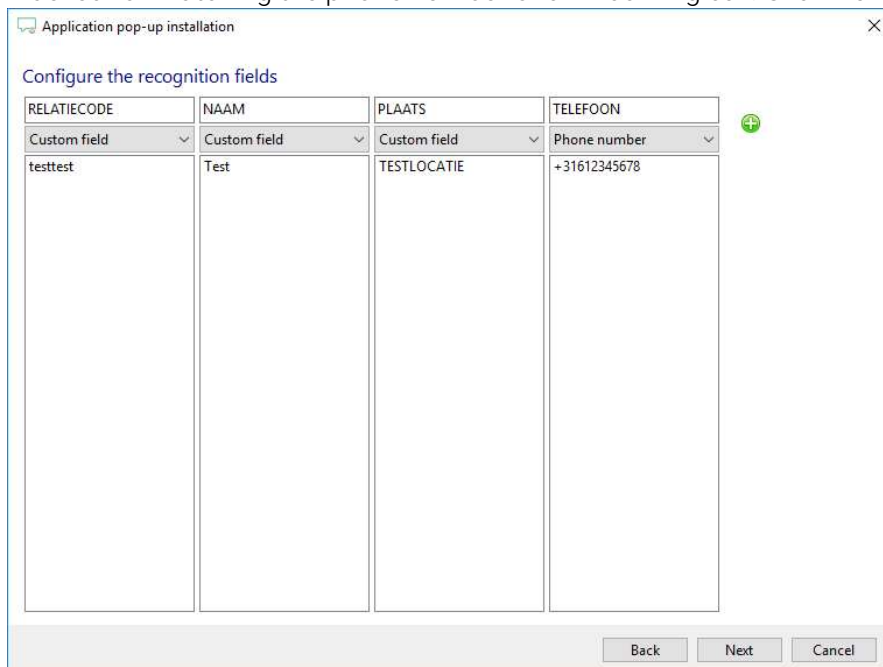
- 1) Start by clicking 'add recognition' in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'AMF', as shown below.



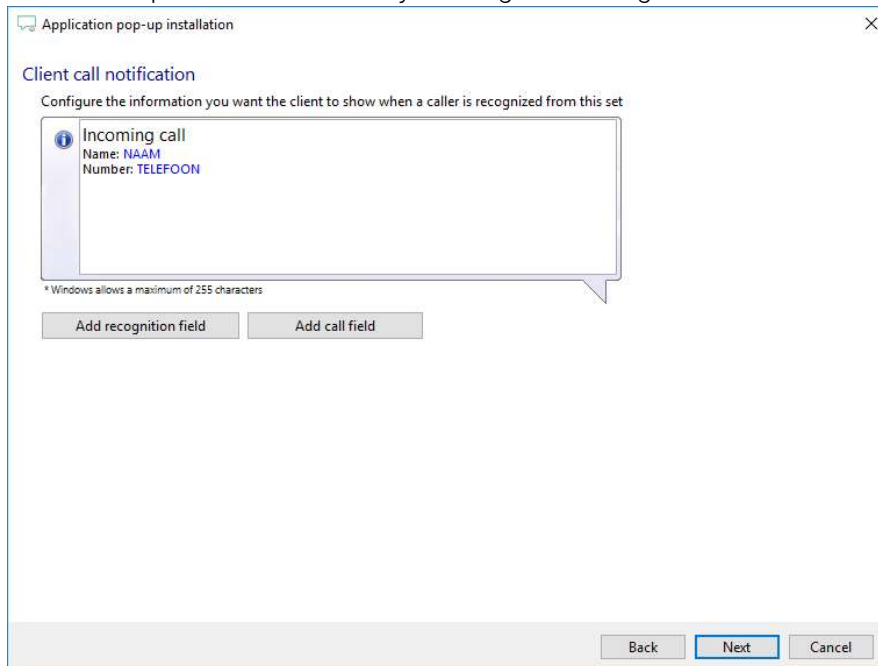
- 2) Select the CSV export file which contains the customer data and press Next.



- 3) Ensure the export file contains the fields: RELATIECODE and NAAM. The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue



- 4) Choose which fields to display in the call notification on an incoming call. Any extra field from the export can be added by clicking 'Add recognition field'.



The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. The main heading is "Client call notification". Below it, the instruction reads: "Configure the information you want the client to show when a caller is recognized from this set".

There is a preview window showing an "Incoming call" notification with the following details:

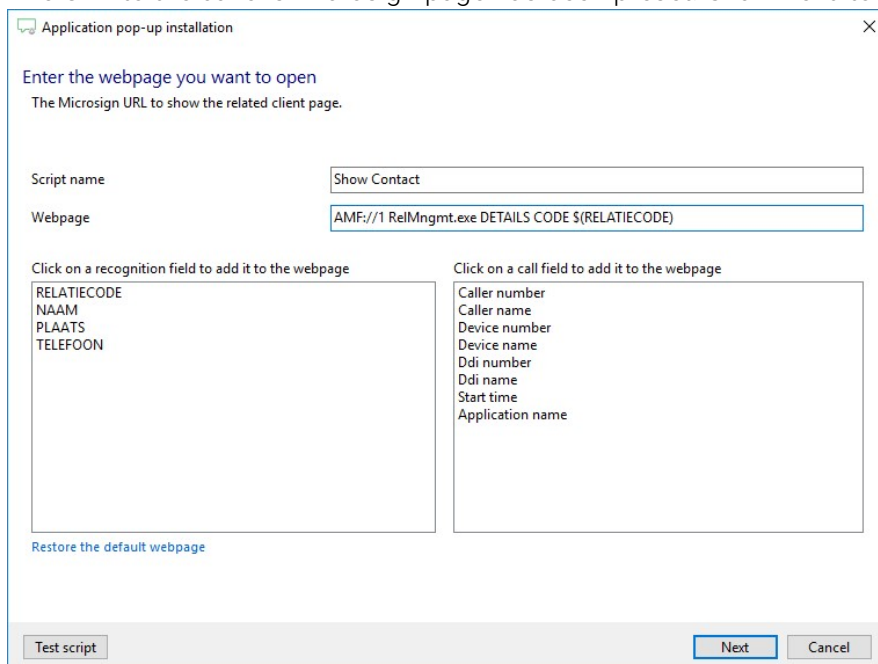
- Name: NAAM
- Number: TELEFOON

 Below the preview, a note states: "* Windows allows a maximum of 255 characters".

At the bottom of the preview area, there are two buttons: "Add recognition field" and "Add call field".

At the bottom of the dialog box, there are three buttons: "Back", "Next" (highlighted in blue), and "Cancel".

- 5) The URL to the caller's Microsign page has been preset. Click 'Next' to continue.



The screenshot shows the same dialog box, now at the "Enter the webpage you want to open" step. The instruction reads: "The Microsign URL to show the related client page.".

There are two input fields:


- "Script name" with the value "Show Contact".
- "Webpage" with the value "AMF://1 RelMngmt.exe DETAILS CODE \$(RELATIECODE)".

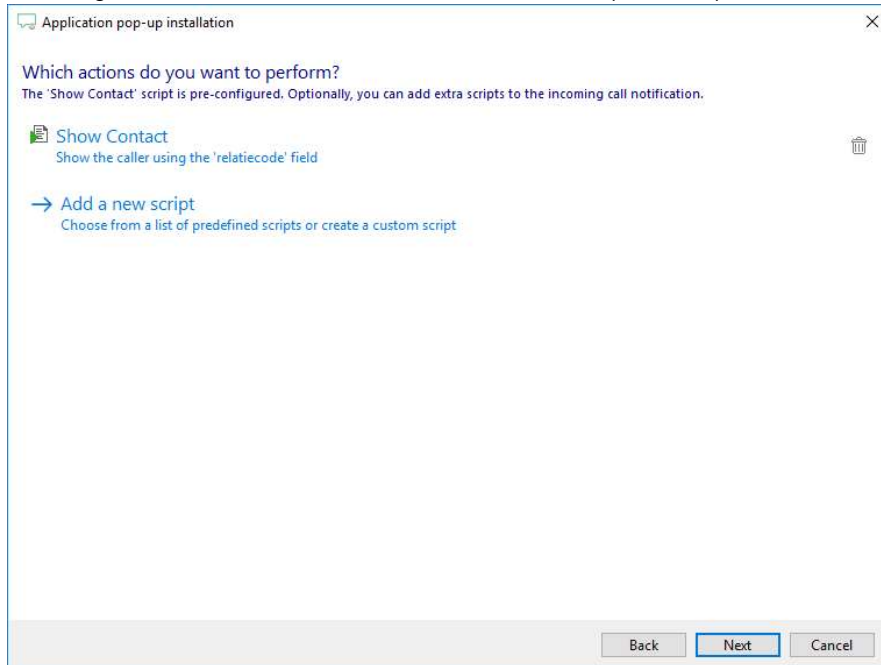
Below the input fields, there are two columns of fields to be added to the webpage:

- Left column: "Click on a recognition field to add it to the webpage". Fields listed: RELATIECODE, NAAM, PLAATS, TELEFOON.
- Right column: "Click on a call field to add it to the webpage". Fields listed: Caller number, Caller name, Device number, Device name, Ddi number, Ddi name, Start time, Application name.

At the bottom left, there is a link: "Restore the default webpage".

At the bottom of the dialog box, there are three buttons: "Test script", "Next" (highlighted in blue), and "Cancel".

- 6) There is one pre-configured script to display caller details based on the RELADTIECODE field from the TXT/CSV export. In case your export is missing the required field, you'll see a warning icon . You can alter/add/remove scripts if required. Click 'Next' to continue.



- 7) Check the configuration summary and click finish to add the recognition from AMF.

