

How to configure caller recognition and screen-pop for:

AccountView

Supported versions:

Contact replication method: CSV TXT export

Screen pop method: keystrokes

Prerequisites

Export function to CSV/TXT file using the report module. For example:

"Open debiteuren > Rapporten > Debiteuren> Opslaan als CSV"

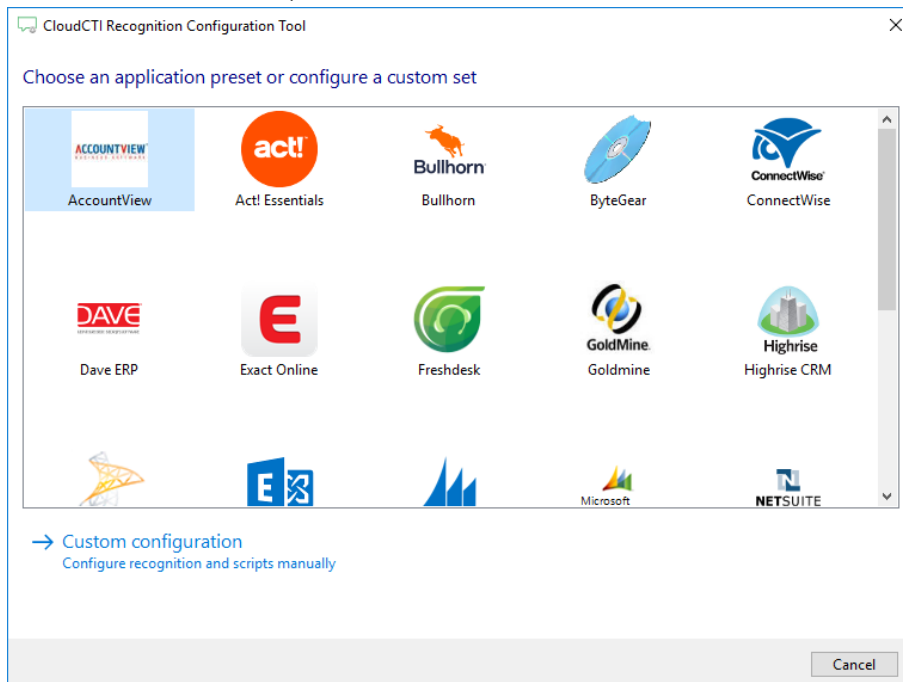
Required fields are debtor/creditor-number, name and phone number fields.

Notes

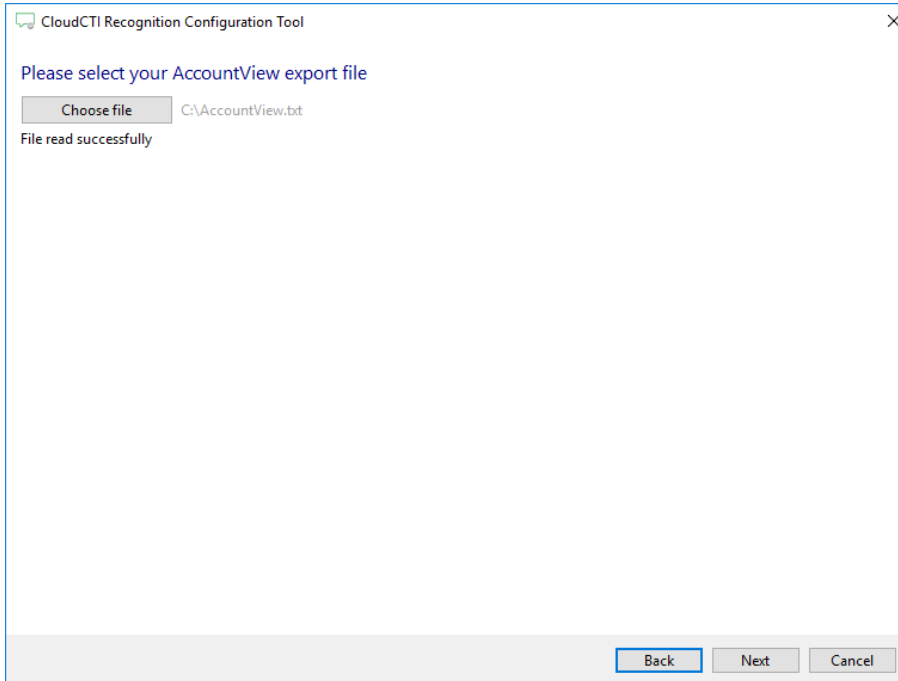
For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

Configuration steps

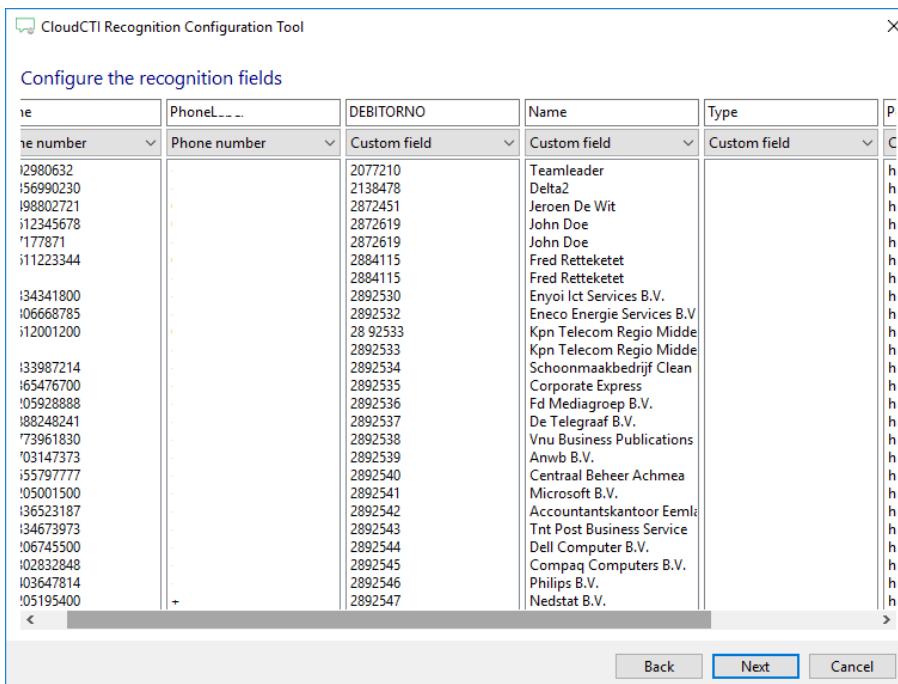
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'AccountView', as shown below.




- 2) Select the CSV/TXT export file containing Creditor/ Debtor contacts
Click 'Next' to continue



- 3) 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.

- 5) There are two pre-configured scripts. A script to display creditor details based on the CREDITORNO field and a script to display debtor details based on the DEBITORNO 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.

- 6) Check the configuration summary and click finish to add the recognition from AccountView

