CRM INFO

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 <u>Recognition Configuration Tool</u> (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

CloudCTI Recognition Configuration Tool	×
Please select your AccountView export file	
Choose file C:\AccountView.txt	
File read successfully	
Back Next Cance	J

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

e	Ph	oneL	DEBITORNO		Name	Туре	
ne number	~ Ph	one number	✓ Custom field	~	Custom field V	Custom field	~
2980632			2077210		Teamleader		
56990230			2138478		Delta2		
98802721	1		2872451		Jeroen De Wit		
12345678	1		2872619		John Doe		
177871			2872619		John Doe		
11223344	1		2884115		Fred Retteketet		
			2884115		Fred Retteketet		
34341800			2892530		Enyoi Ict Services B.V.		
06668785			2892532		Eneco Energie Services B.V		
12001200	1		28 92533		Kpn Telecom Regio Midde		
			2892533		Kpn Telecom Regio Midde		
33987214			2892534		Schoonmaakbedrijf Clean		
65476700			2892535		Corporate Express		
05928888			2892536		Fd Mediagroep B.V.		
88248241			2892537		De Telegraaf B.V.		
73961830			2892538		Vnu Business Publications		
03147373			2892539		Anwb B.V.		
55797777			2892540		Centraal Beheer Achmea		
05001500			2892541		Microsoft B.V.		
36523187			2892542		Accountantskantoor Eemla		
34673973			2892543		Tnt Post Business Service		
06745500			2892544		Dell Computer B.V.		
02832848			2892545		Compag Computers B.V.		
03647814			2892546		Philips B.V.		
05195400	+		2892547		Nedstat B.V.		



4) Choose which fields to display in the call notification on an incoming call.

i	Incoming call	cognized from this set	
	Number: Caller number Source: Application name		
* Windo	ndows allows a maximum of 255 characters		
	Add recognition field Add call field	N	
	-		

5) There are two pre-configured scripts. A script to display creditor details based on the CREDITORNO field and a script to display debitor 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 ^A. You can alter/add/remove scripts if required. Click 'Next' to continue.

🧔 CloudCTI Recognition Configuration Tool	×
Which actions do you want to perform? The AccountView 'Open Creditor' and 'Open Debitor' scripts are configured. Optionally, you can add extra scripts.	
Open debitor Activate AccountView and show the debitor details	ŵ
Open creditor Unknown recognition field in keys: CREDITORNO	Ŵ
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next Can	cel



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

