

How to configure caller recognition and screen-pop for:

AssuPro

Contact replication method: Export to excel or use ODBC

Screen pop method: AssuPro GUI Access application

OR

No contact replication and forward caller number to the AssuPro GUI Access application

Prerequisites

Assupro can be integrated following three different methods:

- A. Replicate the contact information from a manually created Excel export file. On an incoming call, the notification will show the name of the caller and, optionally, any other field you want to show from the export file. The export must contain the field 'Persoon ID' which the screen pop function uses to show the caller's record within AssuPro.
- B. Synchronize the contact information automatically with a direct database connection using the Microsoft SQL ODBC driver. Like with method 'A' the notification will show the name of the caller and, optionally, any other field you want to show from the database. The synchronized data must contain the field 'Persoon ID' which the screen pop function uses to show the caller's record within AssuPro.
- C. Do not synchronize any data and don't show any caller information in the notification from AssuPro. Instead, use the AssuPro GUI Access application to trigger a call notification within AssuPro.

Method A – Excel export

From the AssuPro tab 'Relaties' you can create an export by showing all relation and clicking the 'Excel export' button. Alternatively, you can create your own selection, select all fields you want to export and then export to Excel. Please note that you should always at least select all the phone number fields and the Persoon ID field, which is required for the screen pop. For more info please see: <http://help.aiautomatisering.nl/assu/Selectiemaken.html>

Method B - ODBC

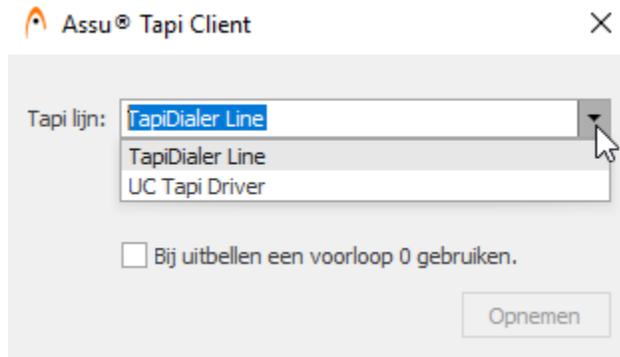
The Microsoft SQL ODBC driver is pre-installed on Windows. In order to configure the connection to the database the Recognition Update Service requires SQL login credentials from the database. These credentials should allow read access on the Relatie table with the phone numbers. If additional information is desired, then the credentials should have read access to the additional tables. Custom queries can be configured in the tool, but it may be easier to simply create a custom view within the SQL server which contains exactly the information that should be synchronized and the credentials having only access to that specific view. Please note that you should always at least select all the phone number fields and the Persoon ID field, which is required for the screen pop.

Method C – Direct notification within AssuPro

With this method the call notification will not show any caller recognition information. The upside is that it has no prerequisites and is easiest to configure.

Outbound dialing

AssuPro can be configured to use the Tapi Dialer which is installed with the client. Within AssuPro go to 'Instellingen/VOIP and check 'Gebruikt Tapi', after which a new tray icon will appear. Right-click the tray icon and choose 'TapiDialer Line' as shown in the screen shot below.

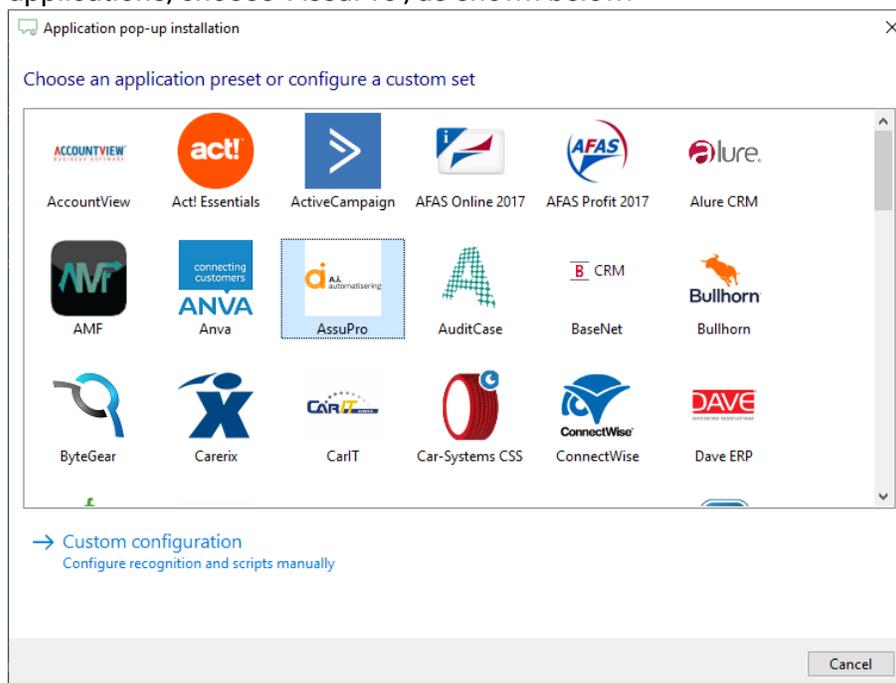


More detailed instructions on where to find the Tapi settings are available here:

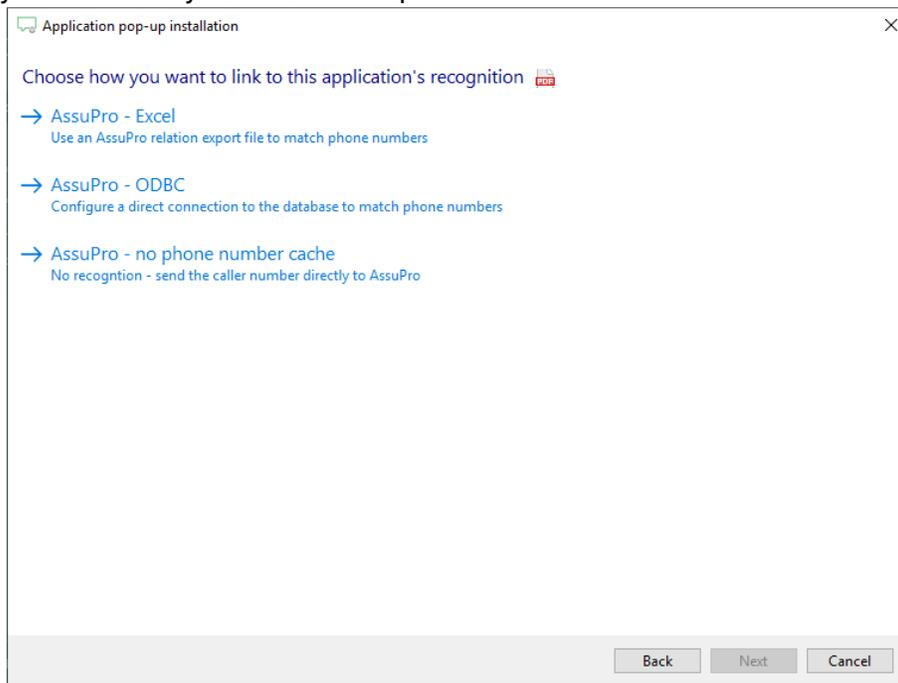
<http://help.aiautomatisering.nl/assu/VoiPkoppeling.html>

Configuration steps

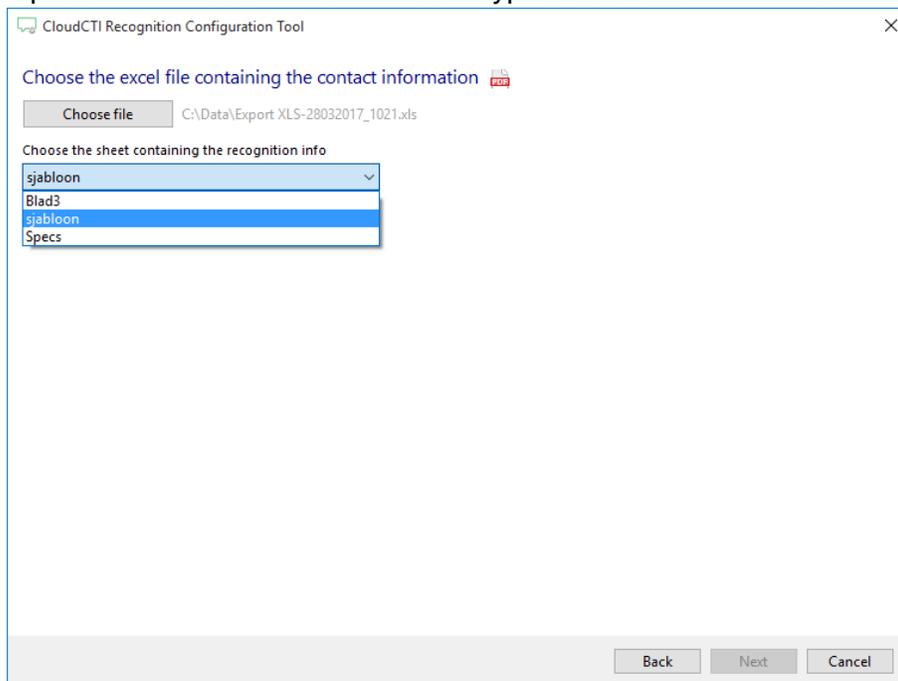
- 1) Start by clicking 'add recognition' in the Recognition Configuration Tool. From the list of applications, choose 'AssuPro', as shown below.



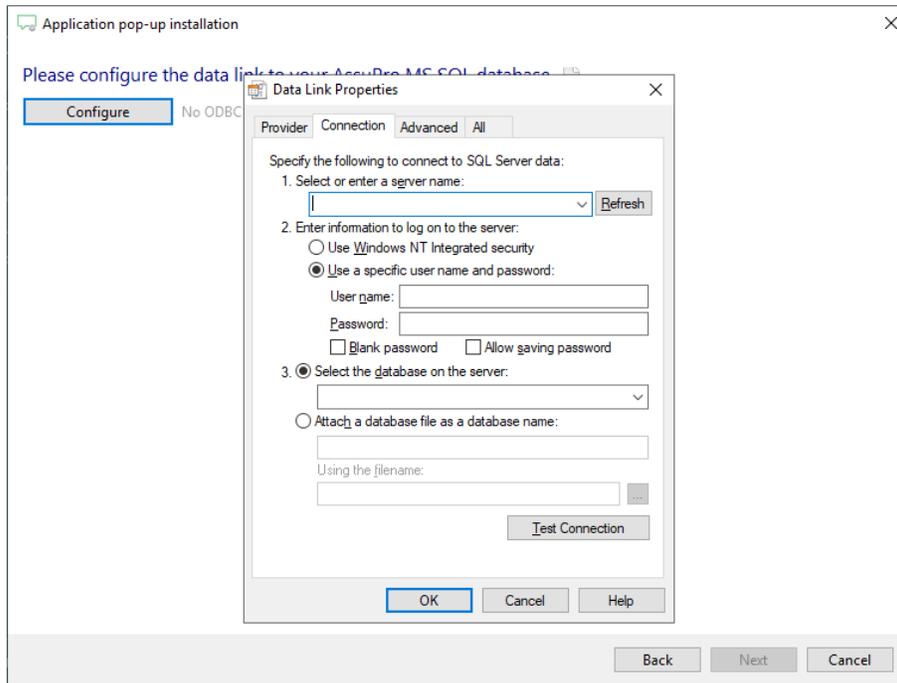
- 2) For method A choose the option 'AssuPro - Excel', for method B choose AssuPro – ODBC and for method C choose AssuPro – no phone number cache. If you choose method C you will directly continue to step 6C.



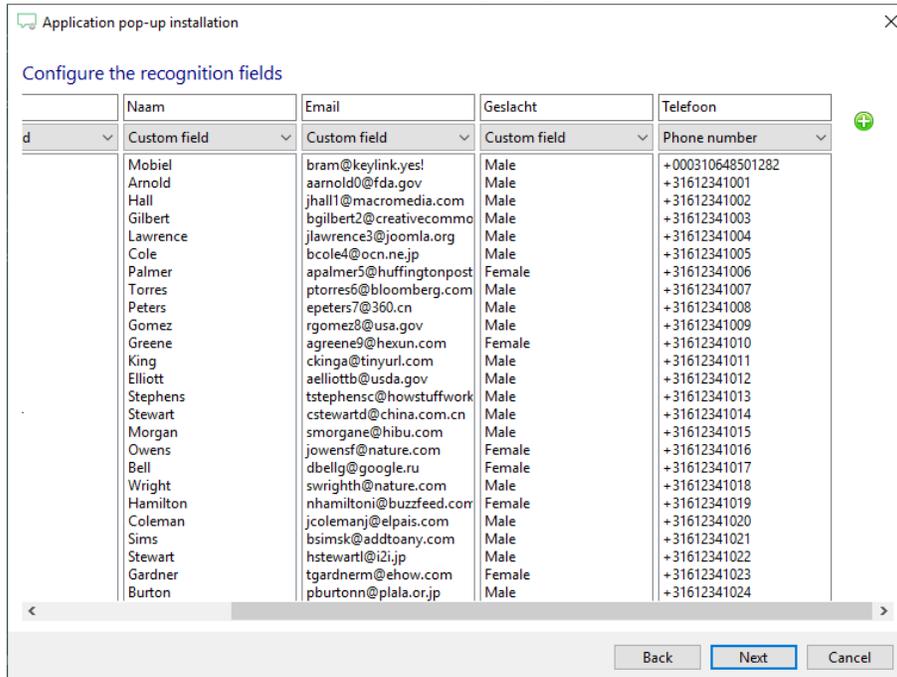
- 3) A) If you chose to use an export file (method A), then select the excel file containing the exported information for this relation type and the correct sheet.



B) If you chose ODBC (method B) then specify the server name and valid credentials. 'Allow saving password' must also be checked to give access to the Recognition Update Service.



4) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.



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

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" with a sub-heading "Configure the information you want the client to show when a caller is recognized from this set". Below this is a large text area containing the following text:

- Incoming call**
- Name: Naam
- Number: Caller number
- Source: Application name

 A note below the text area states: "* Windows allows a maximum of 255 characters". At the bottom of the text area are two buttons: "Add recognition field" and "Add call field". At the very bottom of the dialog box are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

6) A and B) The pre-configured script uses the AssuPro.Client.Gui.DirectAccess.exe application to show the caller's info within AssuPro with the matching 'Persoon ID'.

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 "Configure the application you want to start" with a sub-heading "The field 'Persoon ID' of the matched record is used to display the caller's details." Below this are three input fields:

- Script name: Show Contact
- Program: |E:\Program Files (x86)\Assu\Client\AssuPro.Client.Gui.DirectAccess. Browse
- Arguments: \$(Persoon ID)

 Below these fields are two columns of fields to be added to the arguments:

- Click on a recognition field to add it to the arguments:** id, first_name, Naam, Email, Geslacht, Telefoon
- Click on a call field to add it to the arguments:** Caller number, Caller name, Device number, Device name, Ddi number, Ddi name, Start time, Application name

 At the bottom left of the dialog box is a link: "Restore the default program and arguments". At the very bottom are three buttons: "Test script", "Next" (highlighted with a blue border), and "Cancel".

C) The pre-configured script uses the AssuPro.Client.Gui.DirectAccess.exe application to trigger a notification directly within AssuPro with the 'nottel' parameter and the caller's phone number.

The screenshot shows a dialog box titled "Application pop-up installation". It contains the following fields and options:

- Script name:** Notify AssuPro
- Program:** E:\Program Files (x86)\Assu\Client\AssuPro.Client.Gui.DirectAccess.exe (with a "Browse" button)
- Arguments:** nottel:#{Caller number}
- Click on a call field to add it to the arguments:** A list of fields including Caller number, Caller name, Device number, Device name, Ddi number, Ddi name, and Start time.
- Restore the default program and arguments:** A link to reset the configuration.
- Automatically execute this action:** A checked checkbox.
- Buttons:** "Test script", "Next", and "Cancel".

7) After you have configured the script you can configure additional scripts or click 'next' to continue.

The screenshot shows the "Which actions do you want to perform?" screen of the "Application pop-up installation" dialog box. It displays:

- Which actions do you want to perform?** The 'Notify AssuPro' script is configured. Optionally, you can add extra scripts.
- Notify AssuPro:** Send the caller number to AssuPro to trigger a notification. (Includes a trash icon for removal)
- Add a new script:** Choose from a list of predefined scripts or create a custom script.
- Buttons:** "Back", "Next", and "Cancel".

8) Check the configuration summary and click finish the integration with AssuPro

