

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

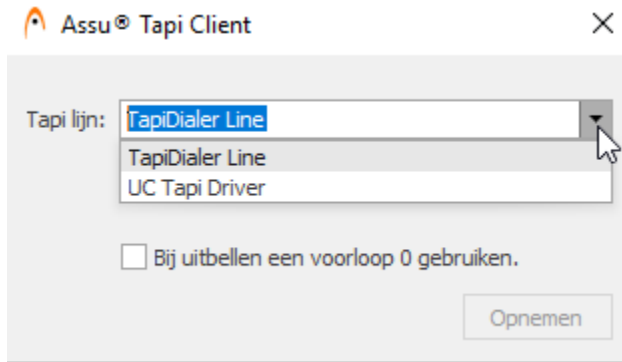
The Microsoft SQL ODBC driver is pre-installed on Windows. In order to configure the connection to the database the Recognition Update Service requires SQL login credentials from the database. These credentials should allow read access on the Relatie table with the phone numbers. If additional information 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.

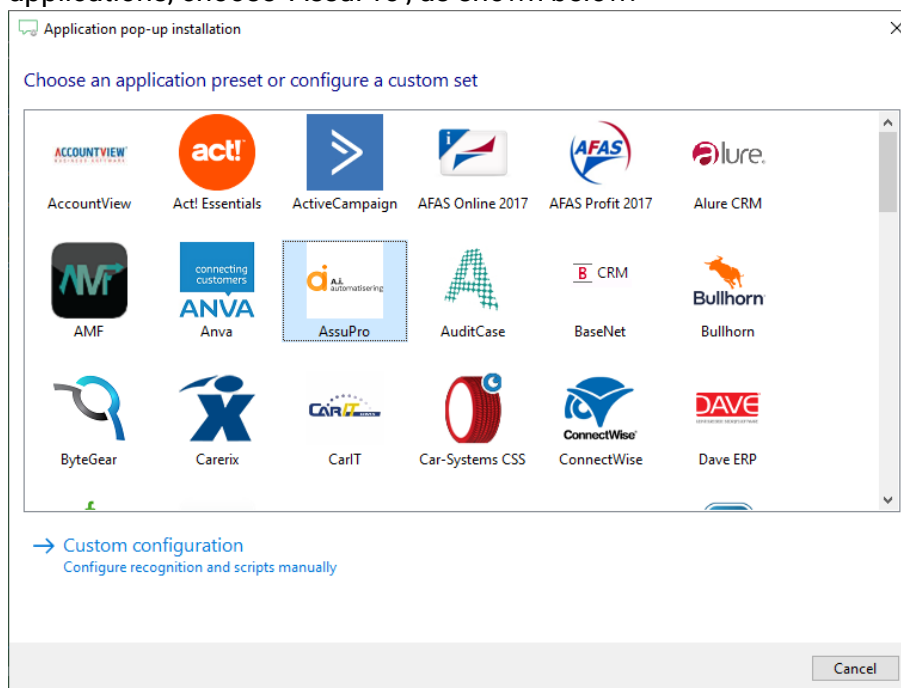


More detailed instructions on where to find the Tapi settings are available here:

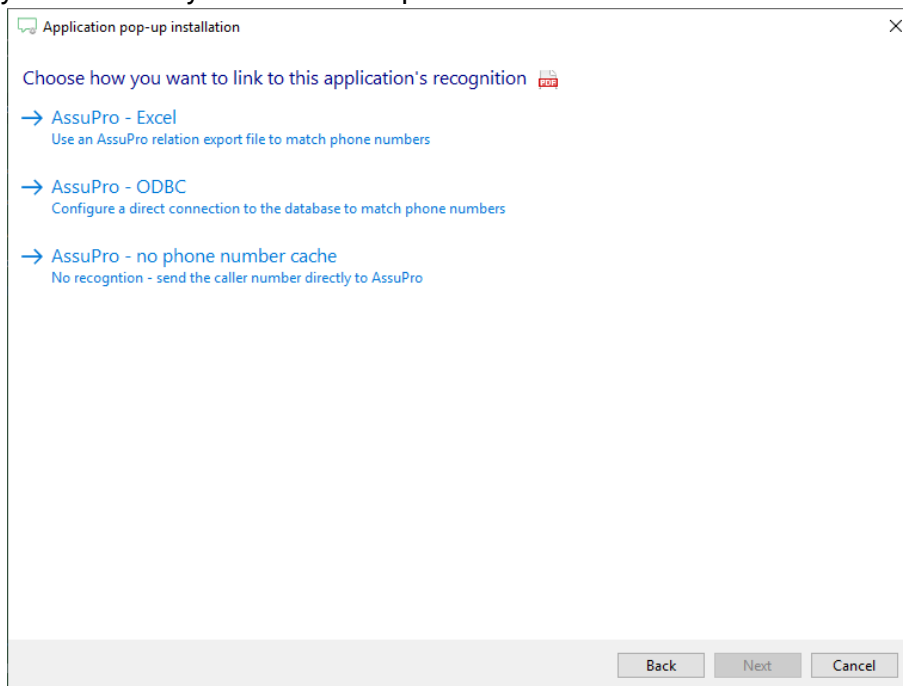
<http://help.aiautomatisering.nl/assu/VoiPkoppeling.html>

Configuration steps

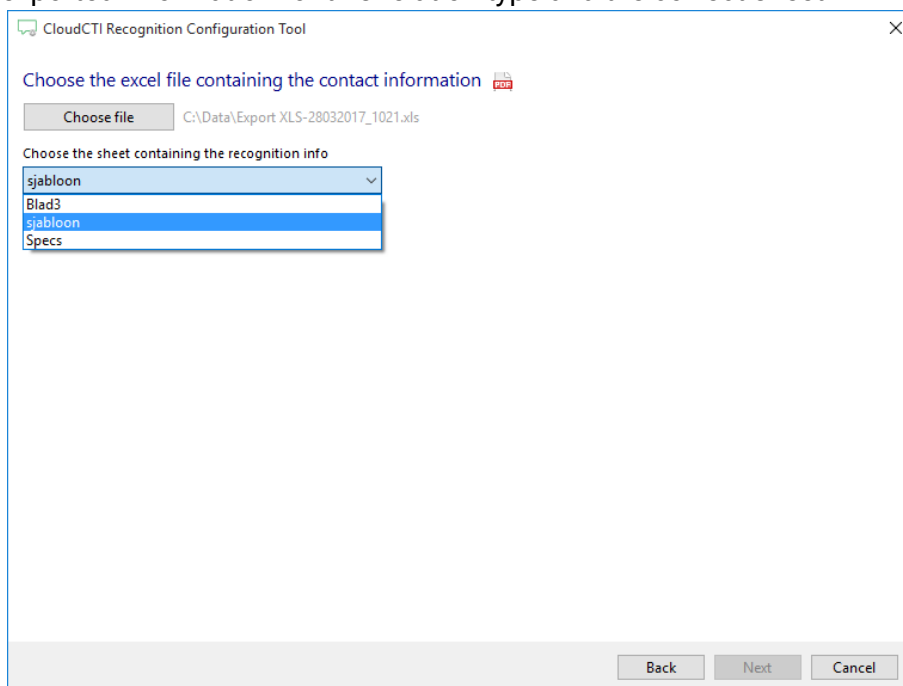
- 1) Start by clicking 'add recognition' in the Recognition Configuration Tool. From the list of applications, choose 'AssuPro', as shown below.



- 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 passing' 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.

	Naam	Email	Geslacht	Telefoon
d	Custom field	Custom field	Custom field	Phone number
	Mobiël	bram@keylink.yes!	Male	+000310648501282
	Arnold	aarnold0@fda.gov	Male	+31612341001
	Hall	jhall1@macromedia.com	Male	+31612341002
	Gilbert	bgilbert2@creativecommo	Male	+31612341003
	Lawrence	jlawrence3@joomla.org	Male	+31612341004
	Cole	bcole4@ocn.ne.jp	Male	+31612341005
	Palmer	apalmer5@huffingtonpost	Female	+31612341006
	Torres	ptorres6@bloomberg.com	Male	+31612341007
	Peters	epeters7@360.cn	Male	+31612341008
	Gomez	rgomez8@usa.gov	Male	+31612341009
	Greene	agreen9@hexun.com	Female	+31612341010
	King	ckinga@tinyurl.com	Male	+31612341011
	Elliott	aelliottb@usda.gov	Male	+31612341012
	Stephens	tstephensc@howstuffwork	Male	+31612341013
	Stewart	cstewartd@china.com.cn	Male	+31612341014
	Morgan	smorgane@hibu.com	Male	+31612341015
	Owens	jowensf@nature.com	Female	+31612341016
	Bell	dbellg@google.ru	Female	+31612341017
	Wright	swright@nature.com	Male	+31612341018
	Hamilton	nhamiltoni@buzzfeed.com	Female	+31612341019
	Coleman	jcolemanj@elpais.com	Male	+31612341020
	Sims	bsimsk@addtoany.com	Male	+31612341021
	Stewart	hstewartli@i2i.jp	Male	+31612341022
	Gardner	tgardnerm@ehow.com	Female	+31612341023
	Burton	pburtonn@pala.or.jp	Male	+31612341024

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

The screenshot shows a window titled 'Application pop-up installation' with a sub-header 'Client call notification'. Below the sub-header is the instruction: 'Configure the information you want the client to show when a caller is recognized from this set'. A large text box contains the following information: 'Incoming call', 'Name: Naam', 'Number: Caller number', and 'Source: Application name'. Below this text box is a note: '* Windows allows a maximum of 255 characters'. At the bottom of the window are three buttons: 'Add recognition field', 'Add call field', and 'Next' (which is highlighted). There are also 'Back' and 'Cancel' buttons at the very bottom right.

- 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 window titled 'Application pop-up installation' with a sub-header 'Configure the application you want to start'. Below the sub-header is the instruction: 'The field 'Persoon ID' of the matched record is used to display the caller's details.' The window contains three input fields: 'Script name' with the value 'Show Contact', 'Program' with the value 'C:\Program Files (x86)\Assu\Client\AssuPro.Client.Gui.DirectAccess.exe' (with a 'Browse' button next to it), and 'Arguments' with the value '\$(Persoon ID)'. Below these fields are two lists of fields to be added to the arguments. The left list, titled 'Click on a recognition field to add it to the arguments', contains: 'id', 'first_name', 'Naam', 'Email', 'Geslacht', and 'Telefoon'. The right list, titled 'Click on a call field to add it to the arguments', contains: 'Caller number', 'Caller name', 'Device number', 'Device name', 'Ddi number', 'Ddi name', 'Start time', and 'Application name'. At the bottom left is a link 'Restore the default program and arguments'. At the bottom right are three buttons: 'Test script', 'Next' (highlighted), 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 window 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". Below this, a note states: "Please check the path to the AssuPro.Client.Gui.DirectAccess.exe application. Note that you could replace the 'nottel' option with 'pertel' to directly open the caller's card." The form contains three input fields: "Script name" with the value "Notify AssuPro", "Program" with the path "c:\Program Files (x86)\Assu\Client\AssuPro.Client.Gui.DirectAccess.exe" and a "Browse" button, and "Arguments" with the value "nottel:#{Caller number}". Below these fields is a section titled "Click on a call field to add it to the arguments" containing a list of fields: "Caller number", "Caller name", "Device number", "Device name", "Ddi number", "Ddi name", and "Start time". At the bottom left, there is a link "Restore the default program and arguments" and a checked checkbox "Automatically execute this action". At the bottom right, there are three buttons: "Test script", "Next" (highlighted with a blue border), and "Cancel".

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

The screenshot shows the same window titled "Application pop-up installation". The main heading is "Which actions do you want to perform?". A note states: "The 'Notify AssuPro' script is configured. Optionally, you can add extra scripts." Below this, there is a list of actions. The first action is "Notify AssuPro" with a description "Send the caller number to AssuPro to trigger a notification." and a trash icon to its right. Below this is a link "→ Add a new script" with a sub-link "Choose from a list of predefined scripts or create a custom script". At the bottom right, there are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

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

