How to configure caller recognition and screen-pop for:

BaseNet

Contact replication method: None, or **optionally** export to excel
Screen pop method: Proprietary API or URL / Keystroke emulation

Prerequisites

BaseNet can be integrated using two distinctly different methods:

Method A.   Connect to the BaseNet Telephony API.

Access must be purchased separately from BaseNet. You will receive a 'ServerId', 'OwnerId', and 'Authorization Key'. These parameters are the only settings required to enable the integration and no manual export is required. Another advantage of this method is that all calls are registered in BaseNet.

This method has two sub-options:

- Use the API – fully cloud based: with this option, all calls are processed server side and passed on from our event service to BaseNet directly. This needs to be activated in the webclient, per user, to enable the cloud-based subscriptions. Once enabled, it will always remain active, even if the user is away from their computer and not signed in anywhere.
- Use the API – client side: with this option, the call events will be sent to BaseNet from the network of the user and the client must be running to pass the information to BaseNet via the API.

When using the Telephony API, users should have these settings configured in 'Instellingen/Persoonlijke/Instelingen telefonie'


The setting 'CloudCTI' for the type and the checked box for the automatic connection, both red underlined, are required.

With the API, BaseNet matches the phone calls to the BaseNet users with the field 'Tel. Intern'. This needs to match exactly once. Thus, all the phone extensions should be registered uniquely to the BaseNet users. The users can all be listed conveniently in one view by going to

'Relatiebeheer/Medewerkers' and then clicking the orange search button, see screenshot:
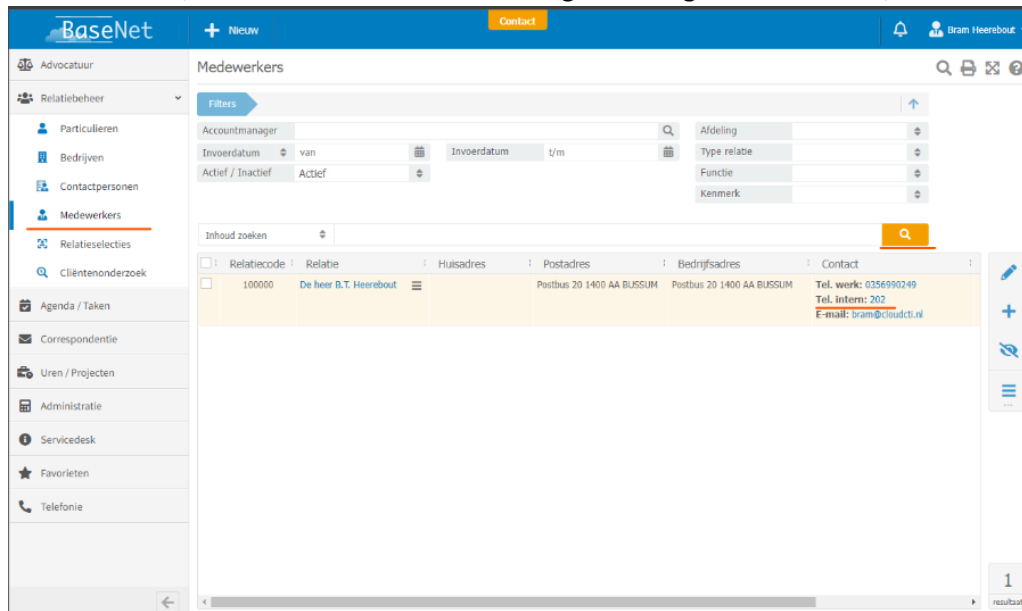
Method B.   Export all relations from BaseNet.

Export all relations with their phone numbers from BaseNet and synchronize these so they can be matched on an incoming call. Recognized callers can also be looked up automatically using their unique Relation Id. The advantage of this method is that it does not involve an extra cost with BaseNet.

All relations can be exported to excel files, but it has to be repeated for each type of relation: 'person', 'company', 'contact' and 'employee' ('particulieren', 'bedrijven', contactpersonen en 'medewerkers' in Dutch).

To export all 'persons', go to 'Relatiebeheer/particulieren', then increase the maximum search results to include all persons in your database and click 'search' with empty search criteria, as shown in the screenshot below:

Particulieren

Filters ↑

Accountmanager	🔍	Afdeling ⇕
Invoerdatum ⇕ van 📅	Invoerdatum t/m 📅	Type relatie ↓
Actief / Inactief Actief ⇕		Kenmerk ⇕

Inhoud zoeken ⇕ 🔍

☐	Relatiecode	Relatie	Huisadres	Postadres	Contact

Er zijn geen resultaten gevonden.

✏️
➕
🚫
☰

Max. resultaten 10000 🔍 0 Resultaten

The results will show all contacts. These can be exported with the 'Actions' (in Dutch: 'Acties') button on the right. Repeat these steps for all relation categories.

Contact information from Excel files can easily be replicated using an ADO (ActiveX Data Objects) connection. By default, Windows has drivers installed supporting Excel 5.0 to Excel 2003 files (*.xls). If these drivers are not installed, please install the Microsoft Access Database Engine 2010 Redistributable. This also supports the newer version of Excel files (*.xlsx). Note: please install the 32 bit version! You can download this driver from the Microsoft site following this link: https://www.microsoft.com/en-us/download/details.aspx?id=13255.

Notes

Telephone numbers in BaseNet are always hyperlinked with the 'tel://' prefix. These are clickable on the workstation without any further configuration.

Configuraton steps
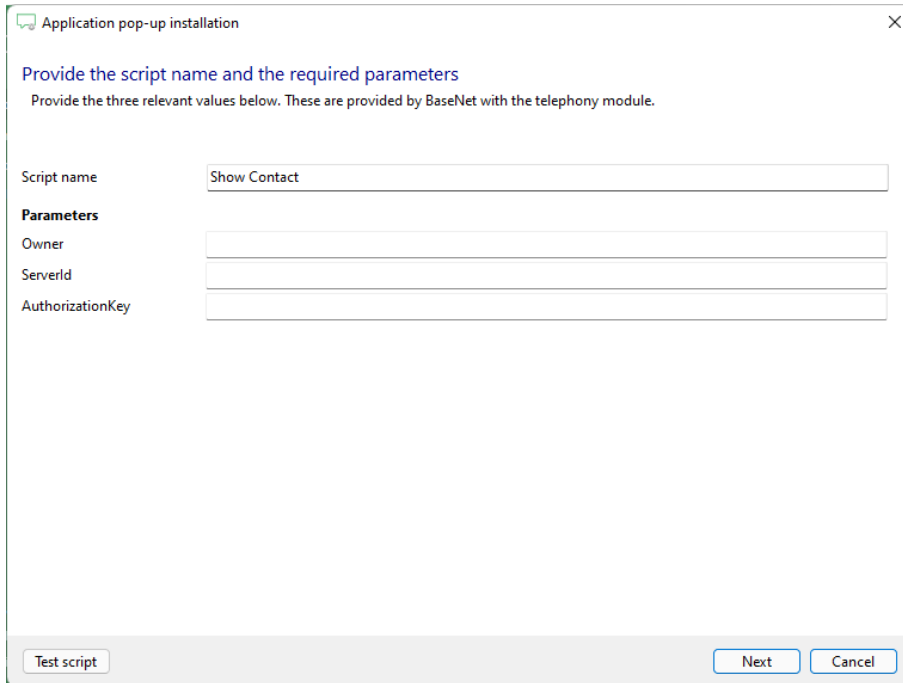
1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose BaseNet, as shown below.

2) For method A, using the telephony API from either the cloud or from the client, choose one of the first two options. For method B, using export files, choose the last option.
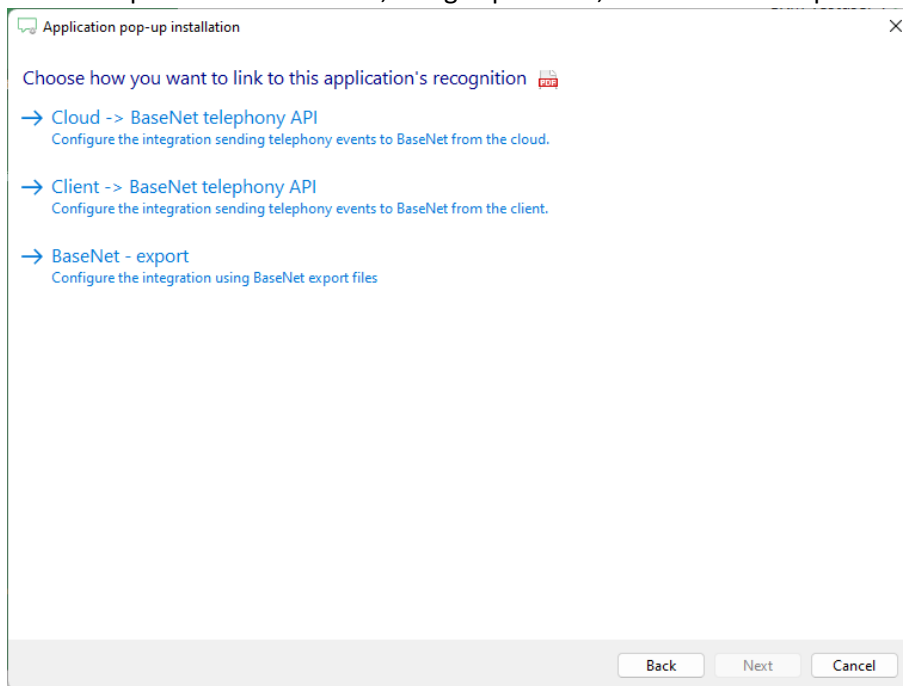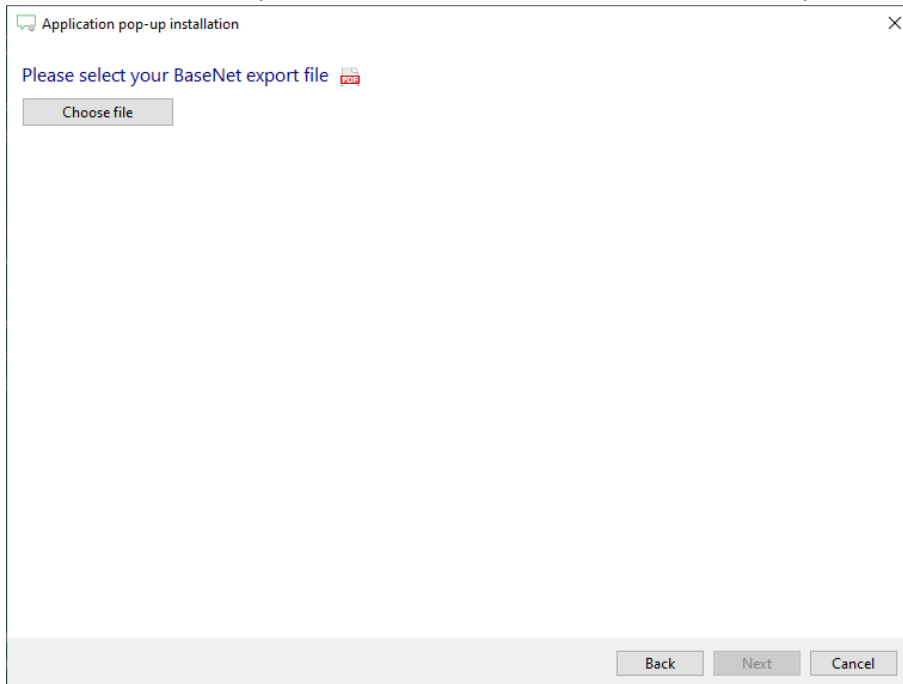
3) A) specify the parameter values you received from BaseNet **and continue directly to step 7**.

B) Select the Excel export file which contains the relation data and press 'next'

4) Verify that the name column has the 'Name' type and that the CTI Wizard automatically set the type of the phone number fields correctly.
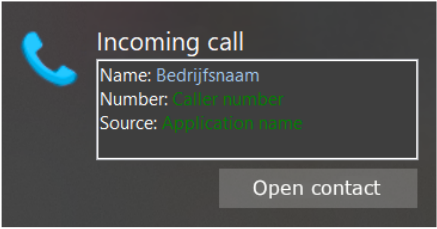
5) Edit the notification to show the correct name column(s) of this export file
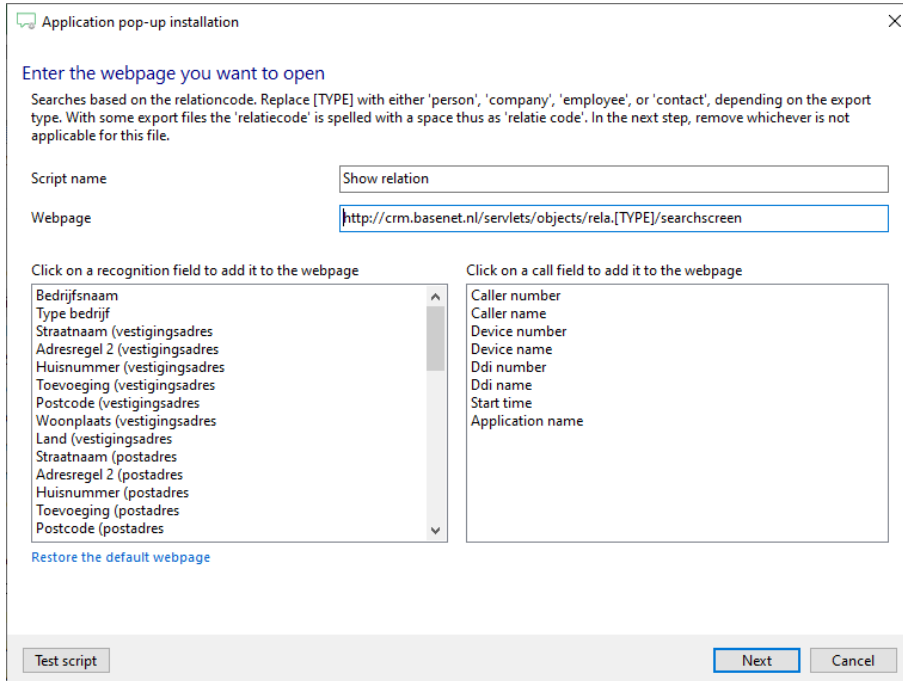
6) Finalize the configuration of the 'Show relation' script. Replace [TYPE] with the appropriate type and click 'next'.

Remove either the 'Recognition Relatiecode' or 'Recognition Relatie code' field, depending on which spelling was used in this export file.

7) The script configuration is complete. Click 'Next' to continue.
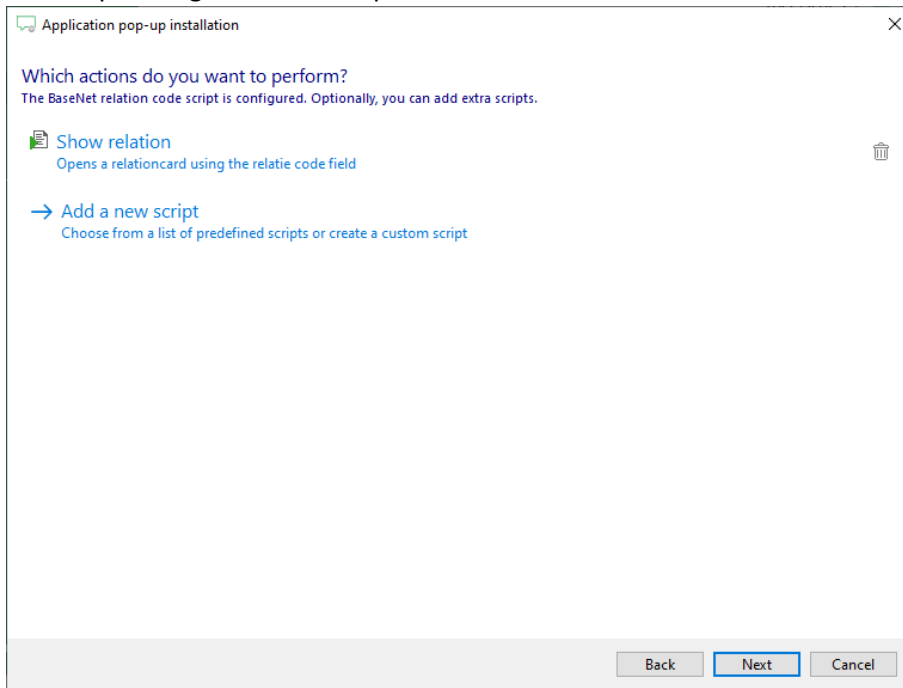
8) Check the configuration summary and click 'Finish' to add the integration with the application.