

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/Instellingen telefonie'

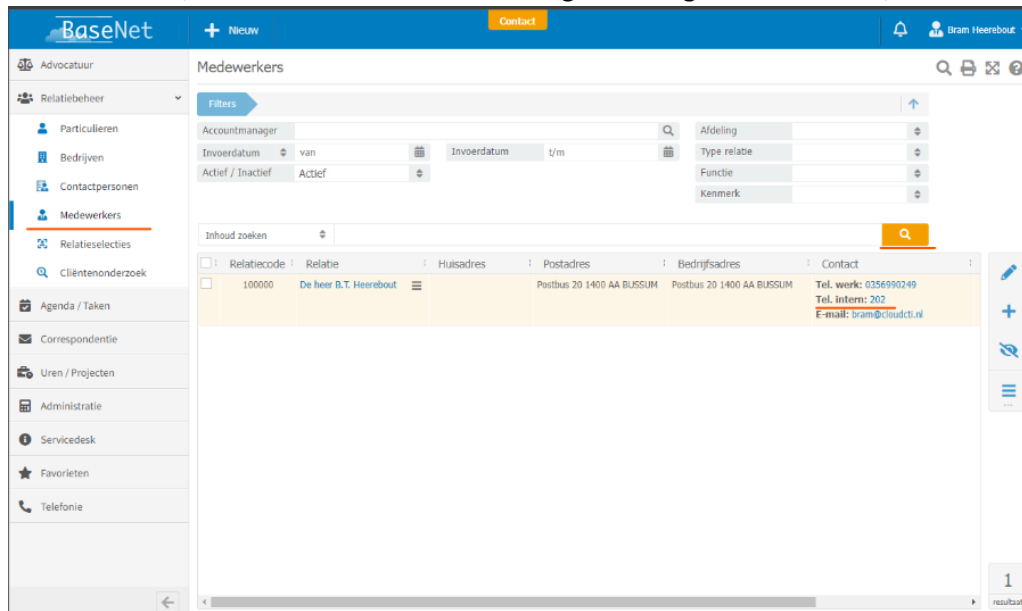
Instellingen telefonie

Type telefonie koppeling	CloudCTI
Gespreksregistratie automatisch openen bij inkomend	Externe geaccepteerd
Gespreksregistratie automatisch openen bij uitgaand	Externe geaccepteerd
Gespreksregistratie automatisch sluiten als niet wor...	Ja
Oproepnotificatie	Notificaties in BaseNe
De hoofdcategorie om standaard te selecteren	Alle
Verbind automatisch met telefonie bij opstarten BaseNet	<input checked="" type="checkbox"/>

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

Invoerdatum van Invoerdatum t/m

Actief / Inactief

Afdeling

Type relatie

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

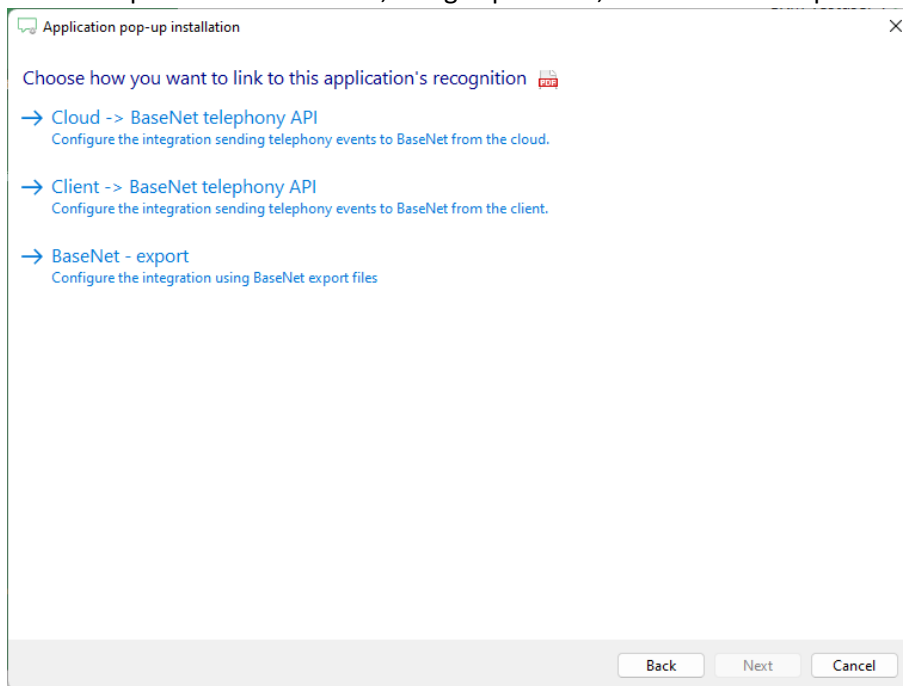
Telephone numbers in BaseNet are always hyperlinked with the 'tel://' prefix. These are clickable on the workstation without any further configuration.

Configuraton steps

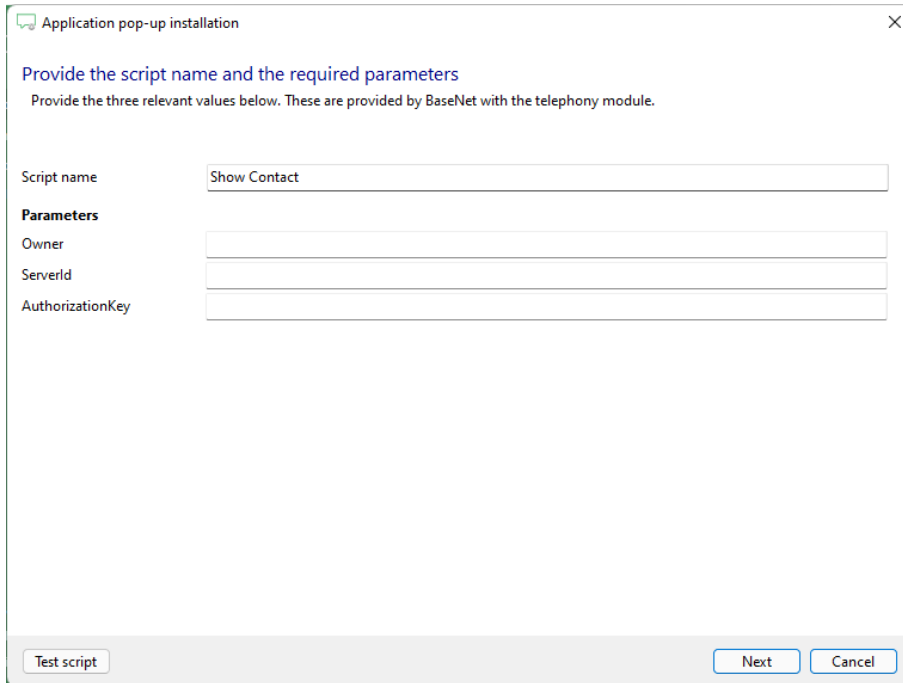
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose BaseNet, as shown below.



- 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.

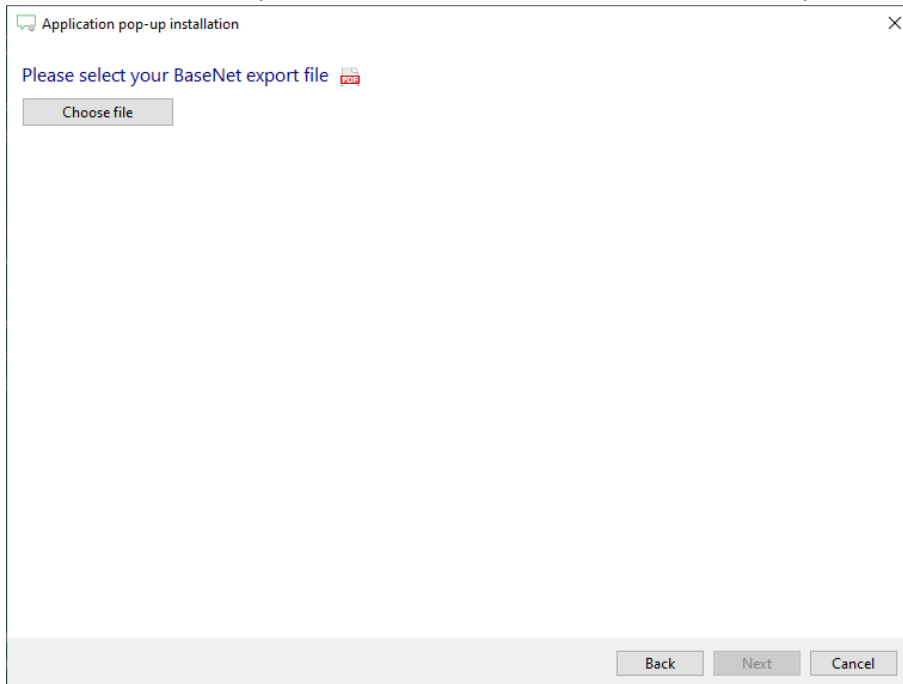


3) A) specify the parameter values you received from BaseNet **and continue directly to step 7.**



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 "Provide the script name and the required parameters" with a sub-note: "Provide the three relevant values below. These are provided by BaseNet with the telephony module." There are four input fields: "Script name" containing "Show Contact", "Owner", "ServerId", and "AuthorizationKey". At the bottom, there are three buttons: "Test script", "Next", and "Cancel".

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



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 "Please select your BaseNet export file" with an Excel icon. Below the heading is a "Choose file" button. At the bottom, there are three buttons: "Back", "Next", and "Cancel".

- 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.

Application pop-up installation

Configure the recognition fields

Bedrijfsnaam	Type bedrijf	Straatnaam (vestigingsadr:	Adresregel 2 (vestigingsadr:	Huisnummer (vestigings:
Name	Custom field	Custom field	Custom field	Custom field
Keylink Belastingdienst BaseNet Internet Projects	Overige Leverancier	Postbus 20 Stationsplein Wg-Plein		50 568

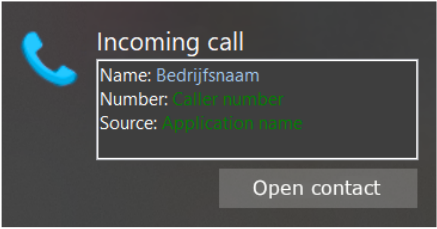
Back Next Cancel

- 5) Edit the notification to show the correct name column(s) of this export file

Application pop-up installation

Client call notification

Configure the information you want the client to show when a caller is recognized from this set



Incoming call

Name: Bedrijfsnaam
 Number: Caller number
 Source: Application name

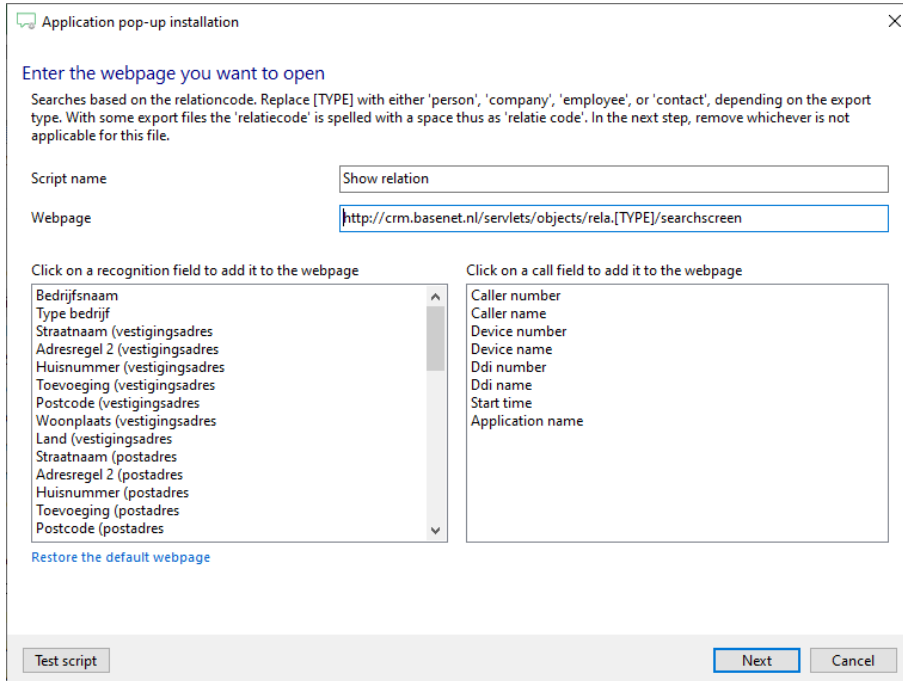
Open contact

* Windows allows a maximum of 4 lines, and a maximum of 128 characters

Add field

Back Next Cancel

- 6) Finalize the configuration of the 'Show relation' script. Replace [TYPE] with the appropriate type and click 'next'.



Application pop-up installation

Enter the webpage you want to open

Searches based on the relationcode. Replace [TYPE] with either 'person', 'company', 'employee', or 'contact', depending on the export type. With some export files the 'relatiecode' is spelled with a space thus as 'relatie code'. In the next step, remove whichever is not applicable for this file.

Script name: Show relation

Webpage: http://crm.basenet.nl/servlets/objects/rela.[TYPE]/searchscreen

Click on a recognition field to add it to the webpage

- Bedrijfsnaam
- Type bedrijf
- Straatnaam (vestigingsadres)
- Adresregel 2 (vestigingsadres)
- Huisnummer (vestigingsadres)
- Toevoeging (vestigingsadres)
- Postcode (vestigingsadres)
- Woonplaats (vestigingsadres)
- Land (vestigingsadres)
- Straatnaam (postadres)
- Adresregel 2 (postadres)
- Huisnummer (postadres)
- Toevoeging (postadres)
- Postcode (postadres)

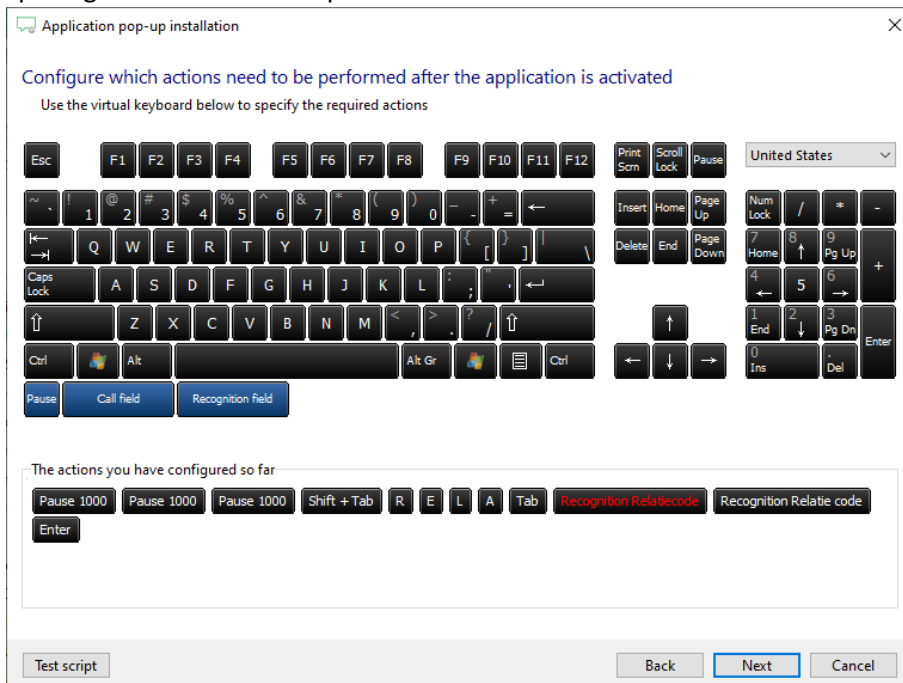
Click on a call field to add it to the webpage

- Caller number
- Caller name
- Device number
- Device name
- Ddi number
- Ddi name
- Start time
- Application name

Restore the default webpage

Test script Next Cancel

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



Application pop-up installation

Configure which actions need to be performed after the application is activated

Use the virtual keyboard below to specify the required actions

United States

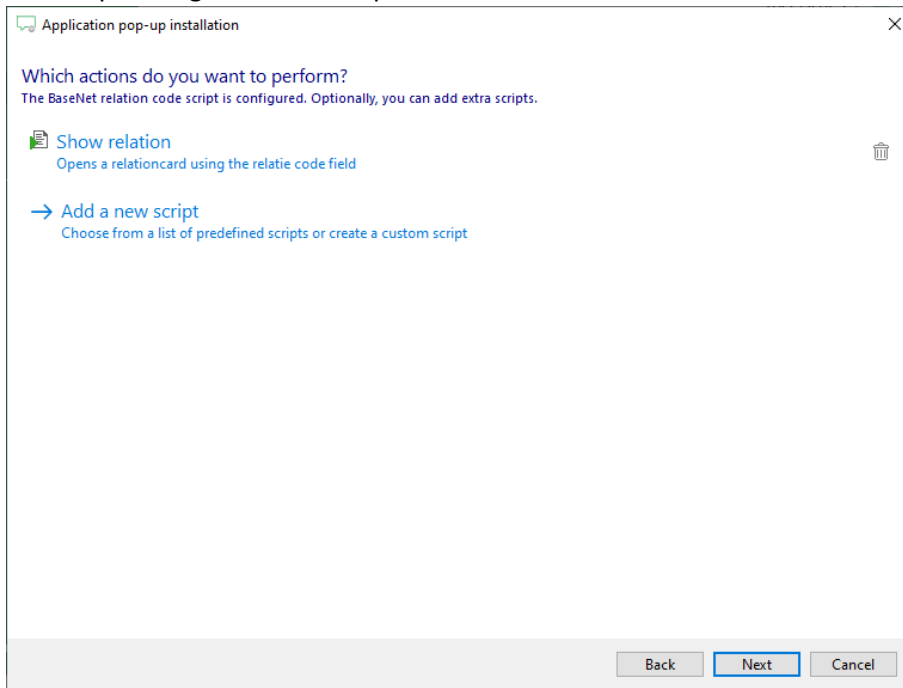
Pause Call field Recognition field

The actions you have configured so far

Pause 1000 Pause 1000 Pause 1000 Shift + Tab R E L A Tab Recognition Relatiecode Recognition Relatie code Enter

Test script Back Next Cancel

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.

