

How to configure caller recognition and screen-pop for:

Car-Systems CSS

Supported versions: CSS 5.x

Contact replication method: TXT/CSV export or ODBC

Screen pop method: keystrokes

Prerequisites

To recognize calling customers, the Recognition Tool requires a CSV/TXT export from or ODBC connection to the CSS Database

Export to CSV

From the user interface of the CSS program it is possible to export almost any visible list to CSV. Create an export containing at least the fields "Naam, Kenteken, Merk, Model" and all phone number fields you want to recognize.

Connection via ODBC (SQL Server)

You can create a connection to the CSS Database using an ODBC driver. This requires database credentials and additional knowledge of the database-structure. Create a query/view containing at least the fields "Naam, Kenteken, Merk, Model" and all phone number fields you want to recognize.

Notes

For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial or use the built-in dial button.

The screenshot displays the 'Contact' tab of the Car-Systems CSS application. The form contains the following data:

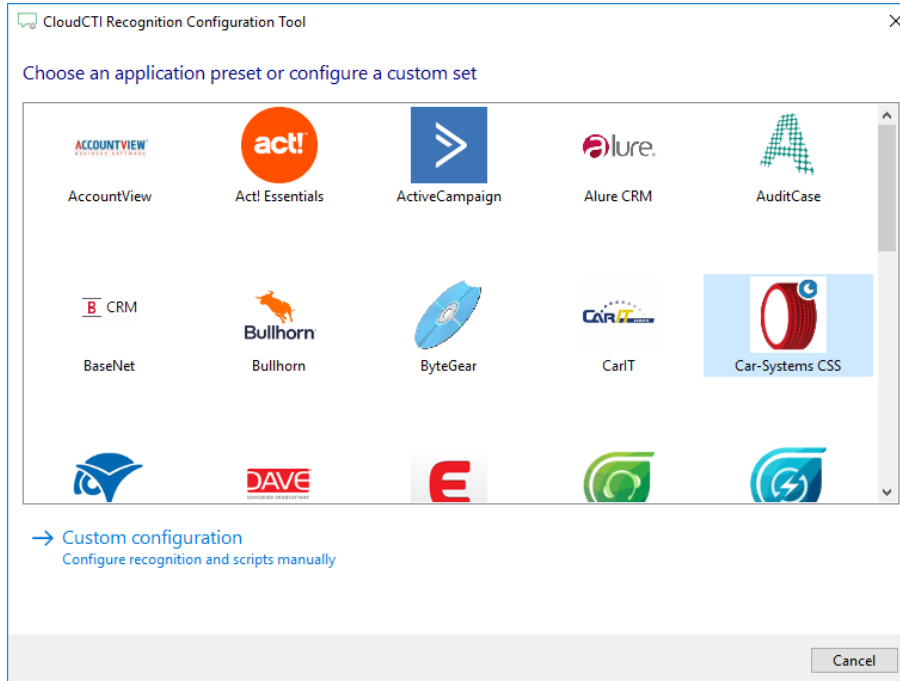
- Naam:** Demo klant
- Tussenvoegsel:** (empty)
- Titel:** Dhr.
- Voornaam:** Demo
- Voorletter(s):** D.
- Titel achtervoegsel:** (empty)
- Geslacht:** Man
- Geboortedatum:** 22-04-1986
- Soort klant:** Particulier (selected), Zakelijk, Handelaar, Potentieel
- Zoekcode:** (empty)
- Debiteurnr.:** (empty)
- Crediteurnr.:** (empty)
- Actief:** ☒ Actief, ☐ Geblokkeerd voor facturatie

Below the main form, there are sections for 'Bezoekadres' (Address) and 'Contactpersonen' (Contact persons). The 'Bezoekadres' section includes fields for T.a.v., Postcode (1234 AB), Huisnr. (12), Straat (Demostraat), Woonplaats (Demostad), Land (Nederland), and Postblokkade. The 'Contactpersonen' section has a list of contact persons with 'Nieuw' (New) and 'Verwijderen' (Remove) buttons.

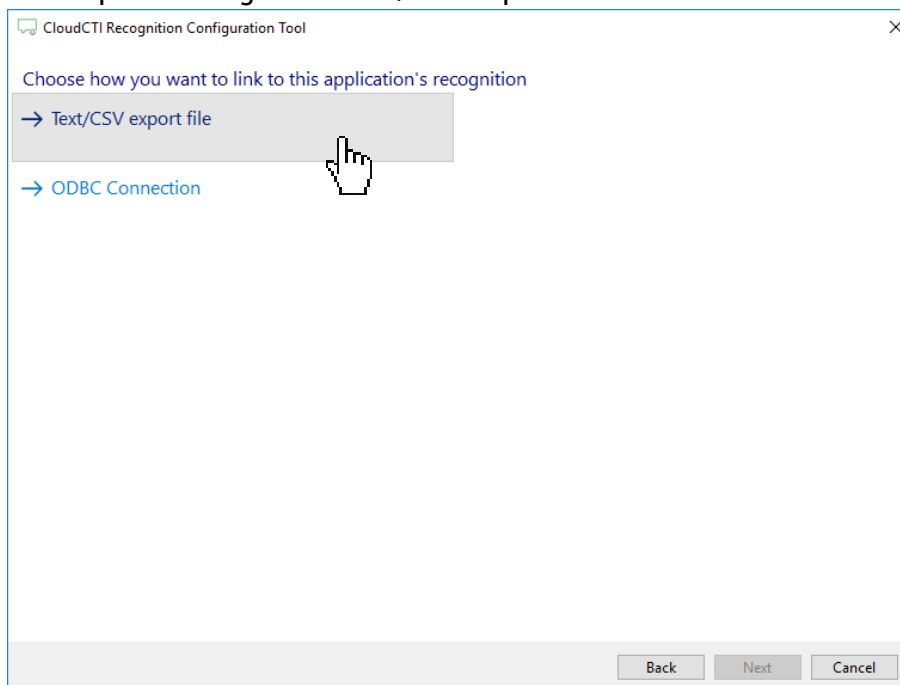
At the bottom, there are fields for 'Telefoon prive' (123-4567890), 'Mobiel' (06-12345678), 'Opmerking' (Remarks), 'Telefoon zaak' (Business phone), 'Fax', and 'E-mailadres' (demo@demo.nl). A red circle highlights the 'Dial' button (a telephone handset icon) next to the 'Telefoon prive' field.

Configuration steps

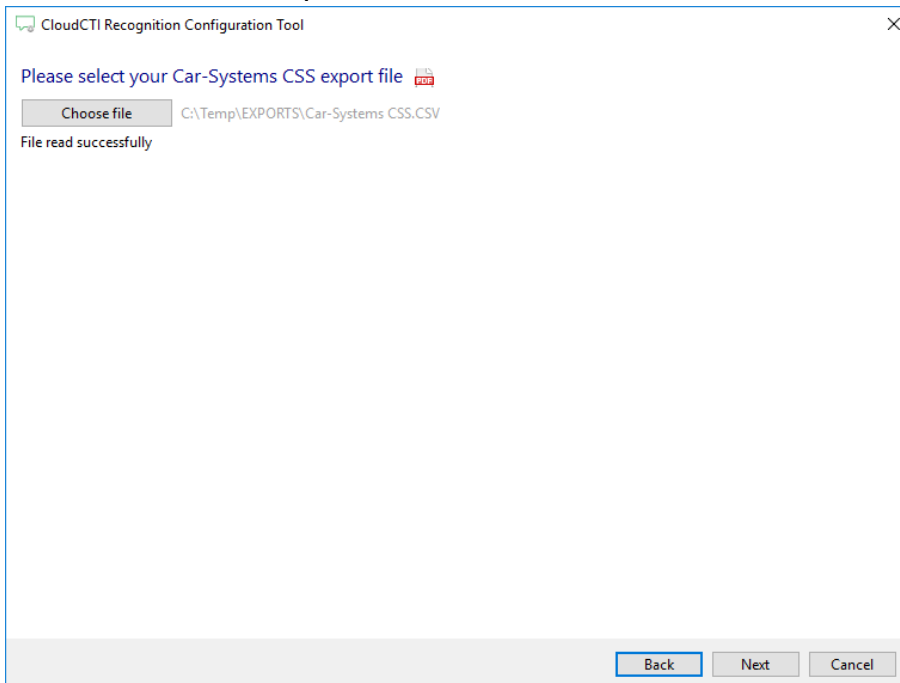
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Car-Systems CSS', as shown below.




- 2) Choose to use an export or to configure an ODBC connection. This document describes the steps to configure an TXT/CSV export



3) Select the TXT/CSV export file to use



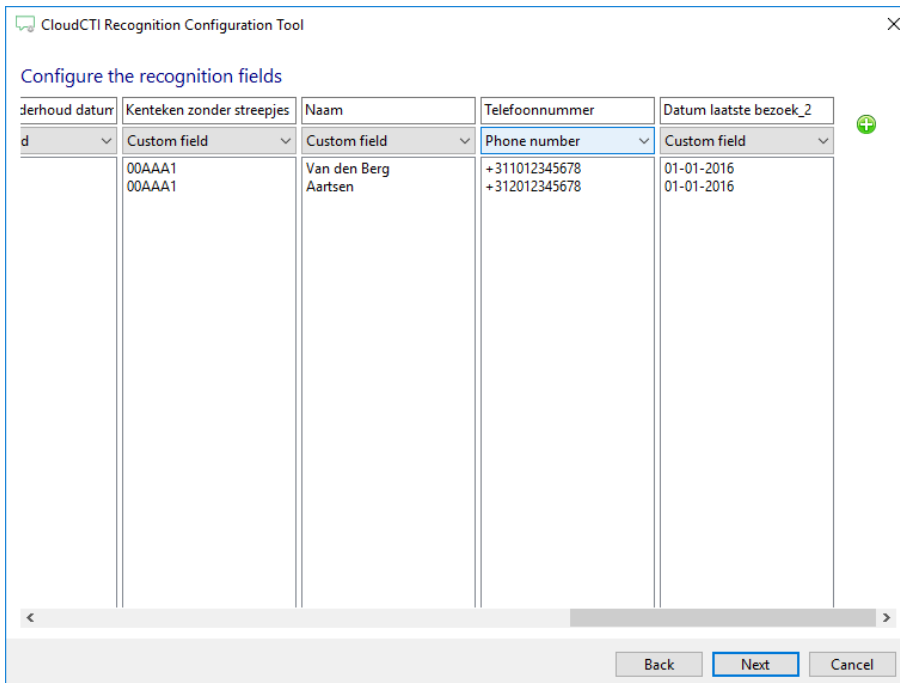
CloudCTI Recognition Configuration Tool

Please select your Car-Systems CSS export file 

C:\Temp\EXPORTS\Car-Systems CSS.CSV

File read successfully

4) 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



CloudCTI Recognition Configuration Tool

Configure the recognition fields

derhoud datum	Kenteken zonder streepjes	Naam	Telefoonnummer	Datum laatste bezoek_2
d	Custom field	Custom field	Phone number	Custom field
	00AAA1 00AAA1	Van den Berg Aartsen	+311012345678 +312012345678	01-01-2016 01-01-2016

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

The screenshot shows the 'Client call notification' configuration window. It contains a text area with the following fields: Name: Naam, License Plate: Kenteken, Brand / Model: Merk / Model, Number: Caller number, and Source: Application name. Below the text area is a note: '* Windows allows a maximum of 255 characters'. At the bottom of the window are three buttons: Back, Next, and Cancel.

CloudCTI Recognition Configuration Tool

Client call notification

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

Incoming call
Name: Naam
License Plate: Kenteken
Brand / Model: Merk / Model
Number: Caller number
Source: Application name

* Windows allows a maximum of 255 characters

Add recognition field Add call field

Back Next Cancel

6) By default, the popup is configured to find the CSS application based on its application path or Windows title bar caption.

The screenshot shows the 'Choose how the script can find the application' configuration window. It includes a 'Script name' field with the value 'Open vehicle details'. There are two checked checkboxes: 'Search all running applications and match on a part of the application path' and 'Search all running applications and match on a part of the visible application name'. The first checkbox has a text field with 'CSS.EXE' and an unchecked checkbox for 'Start the application if it is not active (full path required)'. The second checkbox has a text field with 'CSS - Versie 5'. Below these are buttons for 'Choose from a list of active applications' and a link for 'Restore the default search parameters'. At the bottom are buttons for 'Test script', 'Next', and 'Cancel'.

CloudCTI Recognition Configuration Tool

Choose how the script can find the application

Shows vehicle details based on license plate.

Script name Open vehicle details

☒ Search all running applications and match on a part of the application path
CSS.EXE
☐ Start the application if it is not active (full path required)

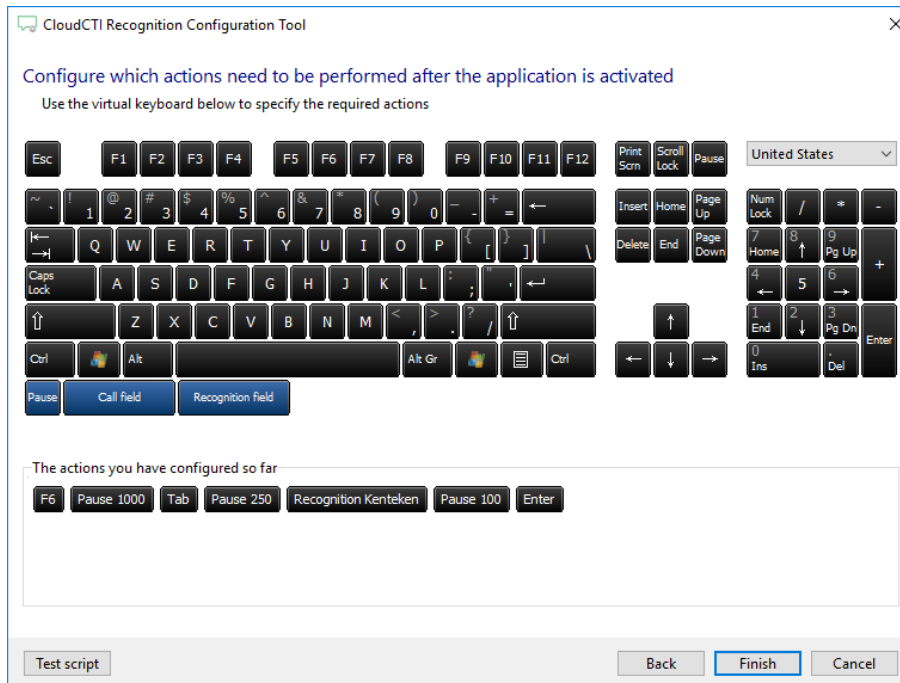
☒ Search all running applications and match on a part of the visible application name
CSS - Versie 5

Choose from a list of active applications

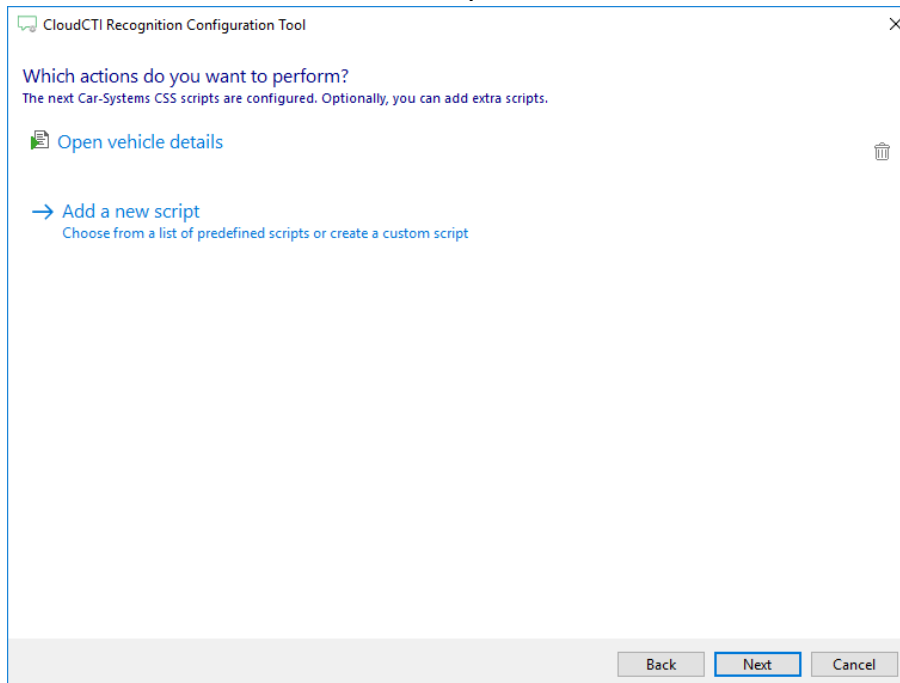
[Restore the default search parameters](#)

Test script Next Cancel

- 7) A keystroke script is pre-configured to open the vehicle details using the “Kenteken” field from your CSV (or ODBC) export. You may leave this default. Click ‘Finish’ to continue.



- 8) You can customize or add new scripts. Press ‘Next’ to continue.



- 9) Check the configuration summary and click finish to add the recognition from Car-Systems CSS

