

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

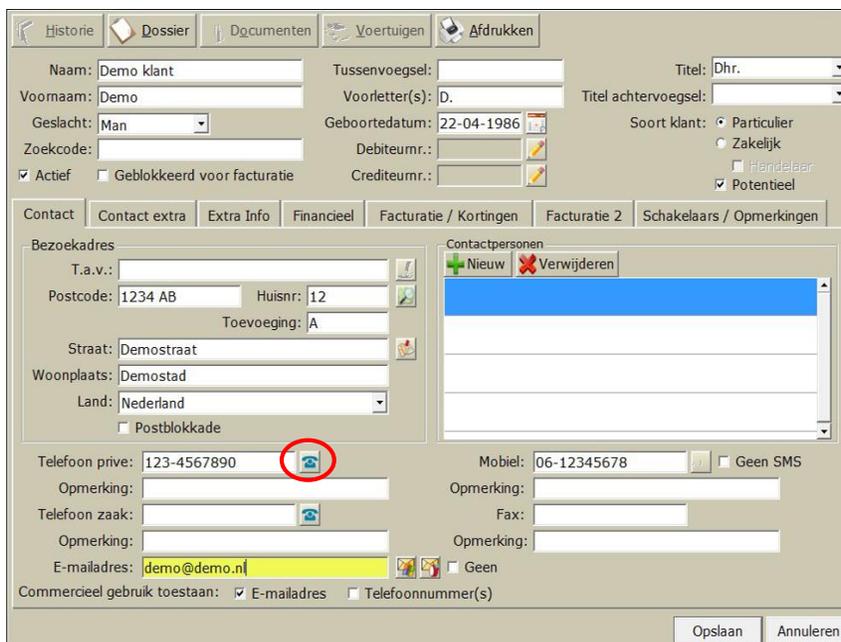
From the user interface of the CSS program it is possible to export almost any visible list to CSV. Create an export containing at least the fields "Naam, Kenteken, Merk, Model" and all phone number fields you want to recognize.

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 shows the 'Contact' tab of the CSS program. The main form contains the following fields:

- 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
- Geblokkeerd voor facturatie

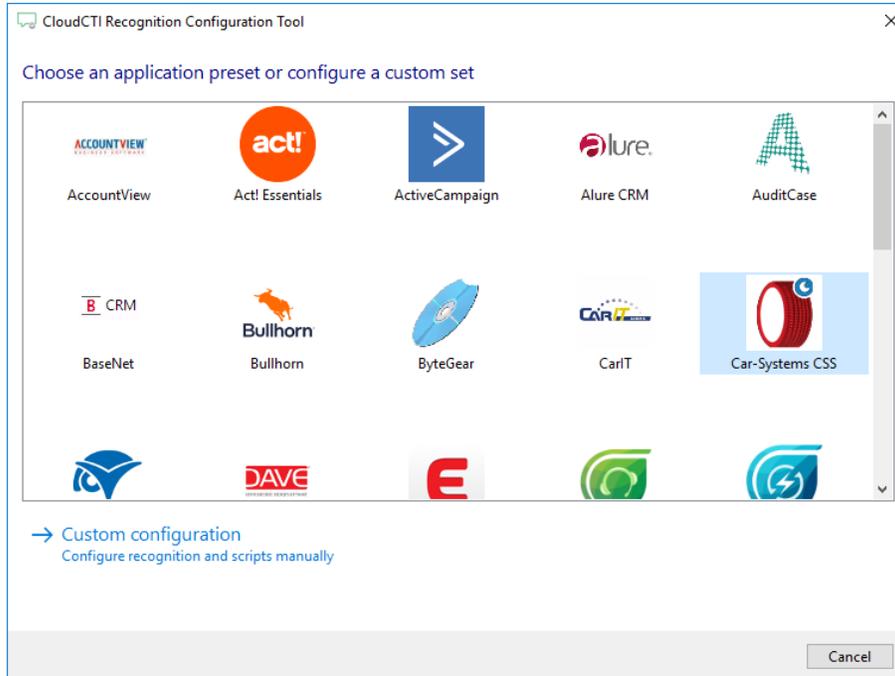
Below the main form are several tabs: Contact, Contact extra, Extra Info, Financieel, Facturatie / Kortingen, Facturatie 2, and Schakelaars / Opmerkingen. The 'Contact' tab is active, showing:

- Bezoekadres:** T.a.v.: (empty), Postcode: 1234 AB, Huisnr: 12, Toevoeging: A, Straat: Demostraat, Woonplaats: Demostad, Land: Nederland, Postblokkade
- Telefoon prive:** 123-4567890 (with a red circle around a dial button icon)
- Mobiel:** 06-12345678, Geen SMS
- E-mailadres:** demo@demo.nl (highlighted in yellow), Geen

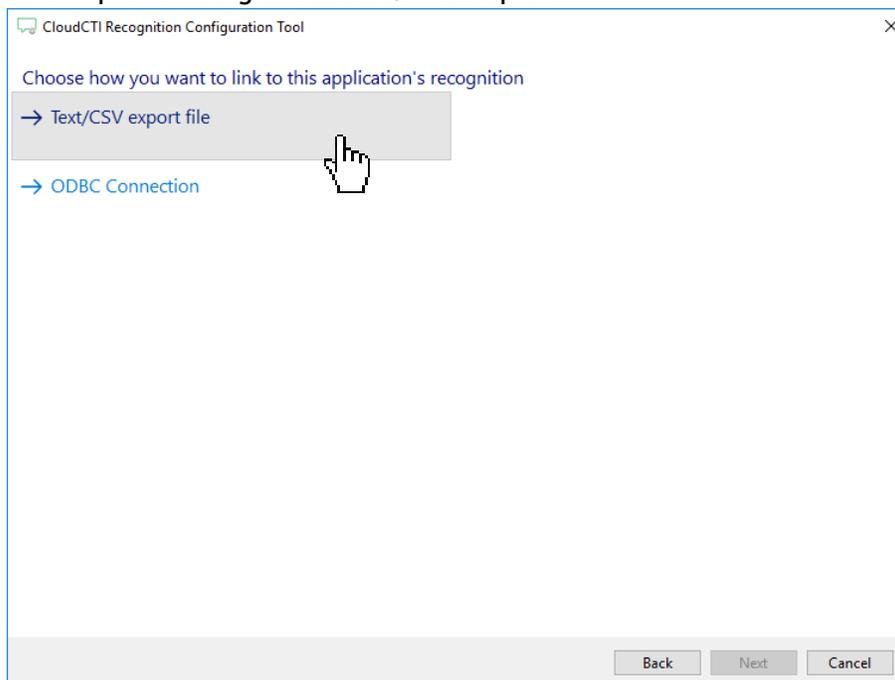
At the bottom right, there are 'Opslaan' and 'Annuleren' buttons.

Configuration steps

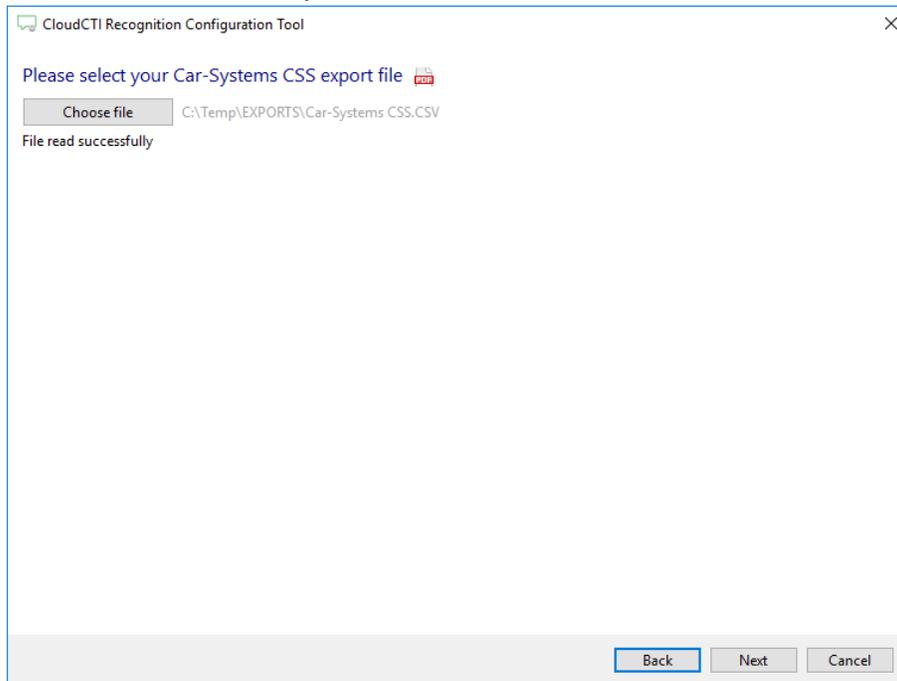
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Car-Systems CSS', as shown below.



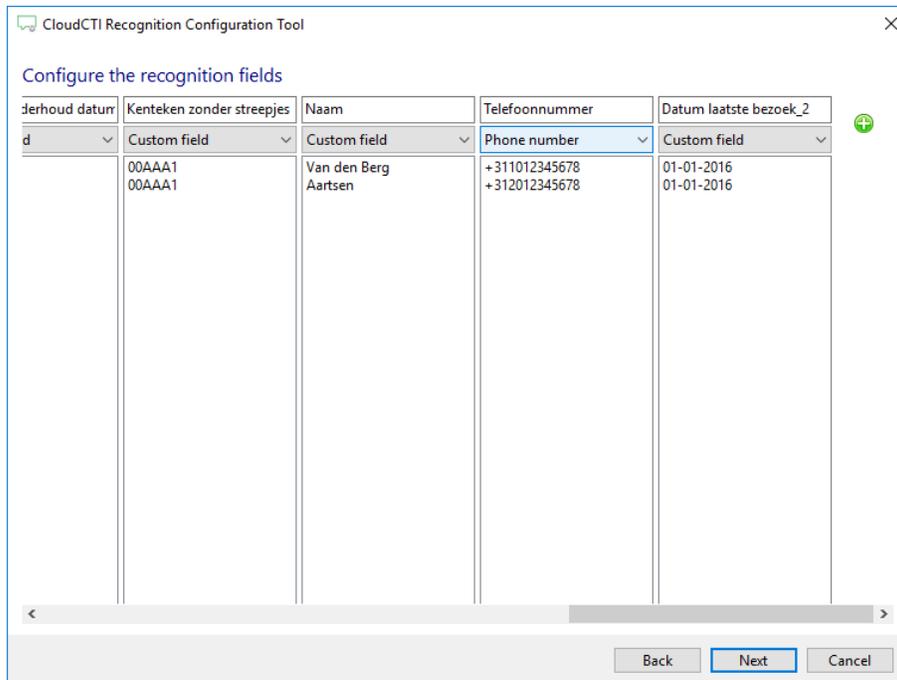
- 2) Choose to use an export or to configure an ODBC connection. This document describes the steps to configure an TXT/CSV export



3) Select the TXT/CSV export file to use



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



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

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

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

CloudCTI Recognition Configuration Tool

Choose how the script can find the application

Shows vehicle details based on license plate.

Script name:

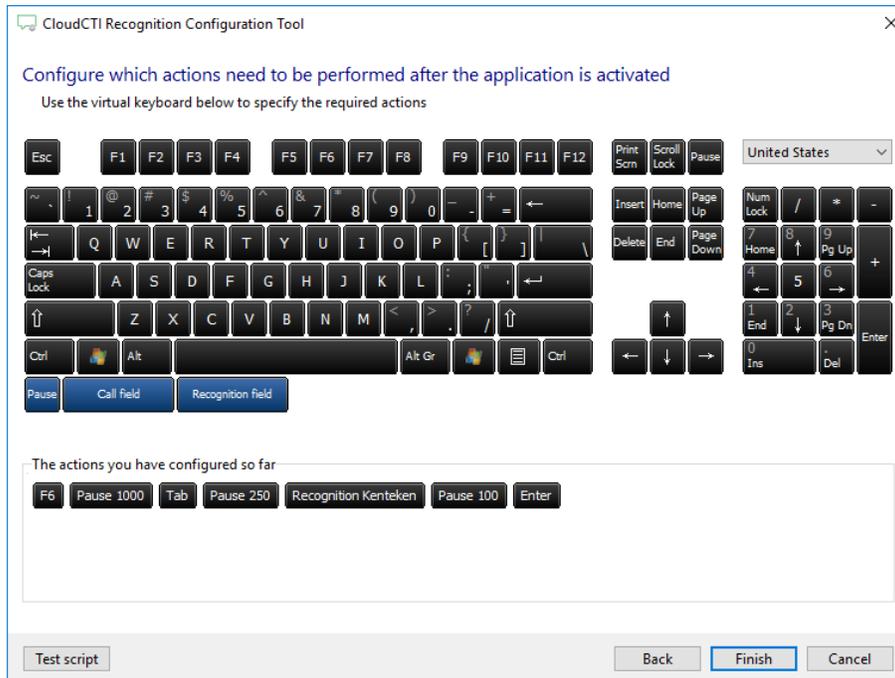
Search all running applications and match on a part of the application path

Start the application if it is not active (full path required)

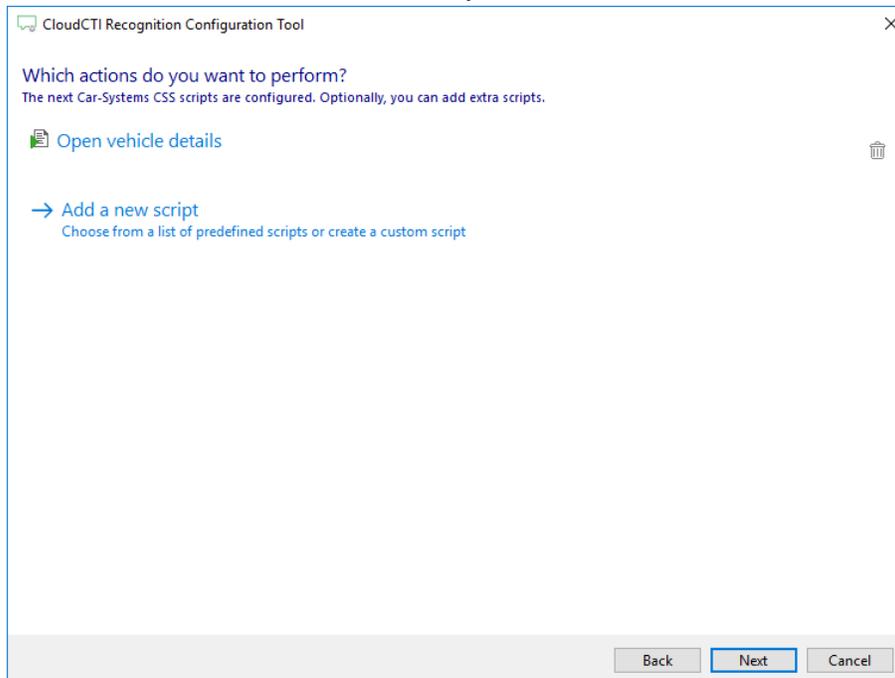
Search all running applications and match on a part of the visible application name

[Restore the default search parameters](#)

- 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

