CRM INFO

How to configure caller recognition and screen-pop for:

# CarlT

Supported versions: CarIT CRM Contact replication method: CSV/Text export Screen pop method: Commandline

# Prerequisites

Using the SV-Tool supplied with CarIT, you can periodically schedule a CSV/Text export. The standard export "exportklantgegevens.csv" contains phone numbers with corresponding customer numbers. With the SV-Tool you can add additional customer fields to display in the notification. For support with creating the export file, you can contact your supplier.

# Notes

For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

# **Configuration steps**

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'CarIT', as shown below.





#### 2) Select the CarIT CSV/Text export file.

🖵 CloudCTI Recognition Configuration Tool	×
Please select your CarlT export file	
C:\Temp\EXPORTS\CarlT klantgegevens.csv	
File read successfully	
	Back Next Cancel

3) 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

	infiguration Tool	×
we cloude if hecognition co	ingulation root	
Configuration and a second		
Configure the recogni	tion fields	
telefoonnummer	klantnummer	
Phone number V	Custom field 🛛 🗸 🗸	•
+311012345678	00000001	
+312012345678	0000002	
+313012345678	0000003	
+314012345678	0000004	
+315012345678	0000005	
+316012345678	0000006	
+317012345678	0000007	
+318012345678	0000008	
+319012345678	0000009	
+311112345678	00000010	
+717378382	00000011	
+311717378382	00000012	
+312717378382	0000013	
+577588914	0000014	
+315012345678	0000015	
+316012345678	0000016	
+31/012345678	0000017	
+318012345678	0000018	
+319012345678	00000019	
+311112345079	0000020	
		Back Next Cancel



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

Confi	igure the information you want the client to show when a caller is recognized from this set	
0	Incoming call Customer ID: Klantnummer Number: Caller number Source: Application name	
* Wind	dows allows a maximum of 255 characters	
	Add tecognition neid Add can neid	

5) By default, the popup is configured to open the customer card based on the given customer number, set as "\$(Klantnummer)". Change "[Drive]" to the correct drive and folder location.

🧔 CloudCTI Recognition Configuration Tool		×			
Configure the application you want to start					
The column 'Klantnummer' of the standard export is used to display the customer contact card. Replace [Drive] with the correct drive/folder location.					
Script name Popup from export					
Program	[Drive]:\BASIS\VPRO5\vpro5.exe				
Arguments	\config.bbx" "[Drive]:\CarlTDMS\Programs\cucarview.bbx" - "CRM0/ <mark>&amp;(Klantnummer)</mark> "				
Click on a recognition field to add it to the a telefoonnummer klantnummer Restore the default program and arguments	rguments Click on a call field to add it to the arguments Caller number Caller number Device number Dodi number Ddi name Start time Application name				
Test script	Next Cancel				



# 6) You can change or add additional scripts. Press 'Next' to continue.

🗔 CloudCTI Recognition Configuration Tool		×
Which actions do you want to perform? The next CarlT scripts are configured. Optionally, you can add extra scripts.		
Popup from export		Ŵ
→ Add a new script Choose from a list of predefined scripts or create a custom script		
	Back Next Can	cel

7) Check the configuration summary and click finish to add the recognition from CarIT

🧔 CloudCTI Recognition Configuration Tool	×
Summary	
Application	
CarlT	
Recognition	
Recognition from import file C:\Temp\EXPORTS\CarlT klantgegevens.csv	
Scripts	
Popup from export: Open application [Drive]:\BASIS\VPRO5\vpro5.exe	
	Back Finish Cancel