

How to configure caller recognition and screen-pop for:

Dave ERP

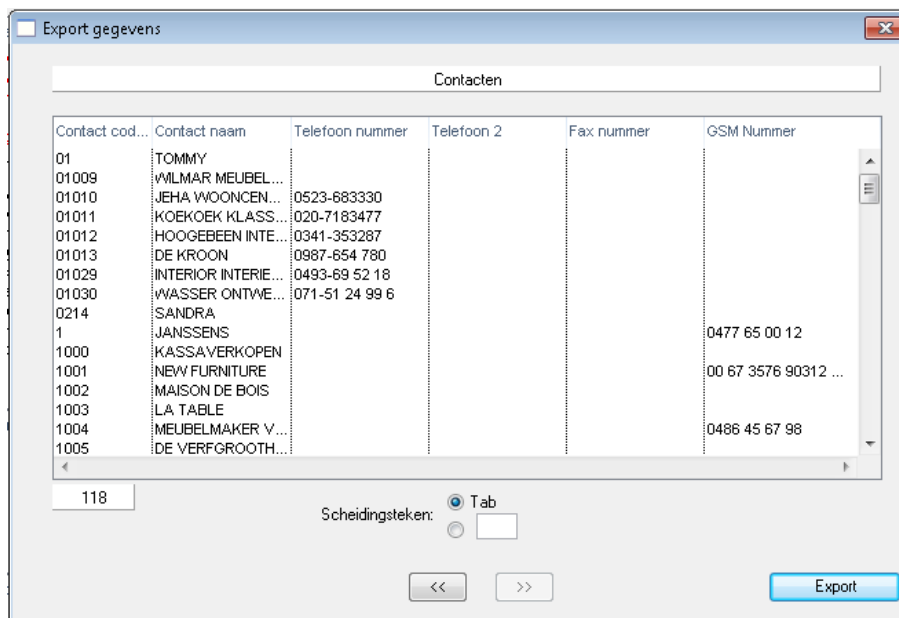
Supported versions: Just Software Dave v2

Contact replication method: TXT/CSV export

Screen pop method: Keystroke emulation

Prerequisites

The simplest method for replication of your Dave ERP is by file export. An export file can be made via “Bestand > Export/Import gegevens > Export”. The export must contain at least “Contact Code”, “Contact naam” and phone number fields. Press “Export” to save the file to TXT/CSV format.

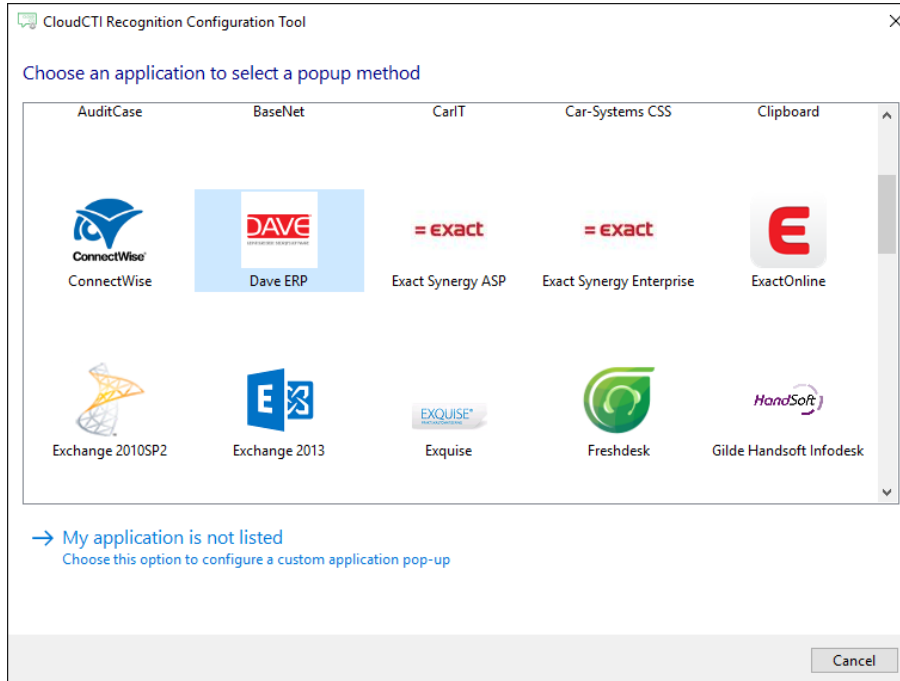


Notes

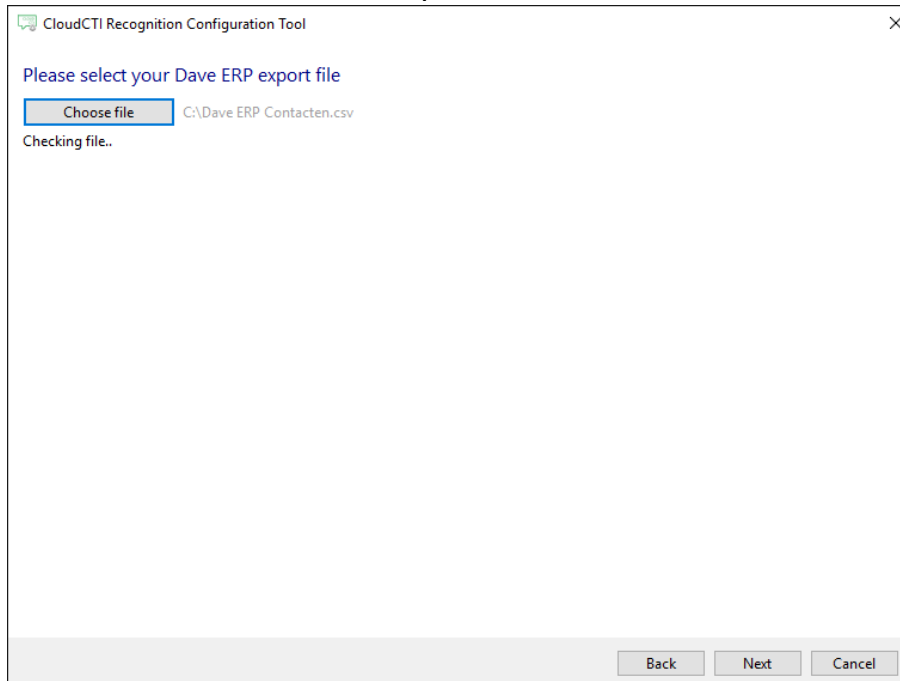
For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

Configuration steps

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



- 2) Select the Dave ERP contact export TXT/CSV file.



- 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

CloudCTI Recognition Configuration Tool

Configure the recognition fields

Contact code *	Contact naam	Telefoon nummer	Telefoon 2	Fax nummer
Custom field	Name	Phone number	Phone number	Phone number
CCONTACT	CNAAM1	+	+312	CFAX
01	TOMMY			
01009	WILMAR MEUBELEN EN VE			
01010	JEHA WOONCENTRUM	+31523683330		
01011	KOEKOEK KLASSIEKE MEU	+31207183477		
01012	HOOGEBEEN INTERIEUR M	+31341353287		
01013	DE KROON	+31987654780		
01029	INTERIOR INTERIEURARCH	+31493695218		
01030	WASSER ONTWERPEN	+31715124996		
0214	SANDRA			
1	JANSSENS			
1000	KASSAVERKOPEN			
1001	NEW FURNITURE			
1002	MAISON DE BOIS			
1003	LA TABLE			
1004	MEUBELMAKER VERSTREP			
1005	DE VERFGROOTHANDEL			
1006	DE ZITSPECIALIST			
1007	DEN BEHANGER			
1008	ARTDECO			
1014	SODEXO BELGIUM SA			
1015	SECUREX CORPORATE			
1016	RANDSTAD PROFESSIONA			
1017	KBC BANK			
1018	KBC LEASE			

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- 4) 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

i Incoming call

Contact name: **Contact naam**

Number: **Caller number**

Source: **Application name**

* Windows allows a maximum of 255 characters

Add recognition field Add call field

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- 5) By default, the popup is configured to bring Dave ERP to the foreground. You may leave this default. Click 'next' to continue.

CloudCTI Recognition Configuration Tool

Choose how the script can find the application
Provide search criteria to specify Dave ERP's main window.

Script name: Show Contact

☒ Search all running applications and match on a part of the application path
omnis.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
Dave

Choose from a list of active applications
[Restore the default search parameters](#)

Test script Next Cancel

- 6) After Dave ERP is brought to the foreground, the script emulates keystrokes to search for the contact based on the "Contact Code" from your export. Click 'next' to continue. Explanation: Hotkey F2 opens the contact list window, Ctrl+F opens the contact search window (in case it's not visible). With Shift+TAB the focus is set to the Contact Code search filter. The Contact Code is entered automatically, then ENTER is pressed to filter and show the corresponding contact card.

CloudCTI Recognition Configuration Tool

Configure which actions need to be performed after the application is activated
Use the virtual keyboard below to specify the required actions

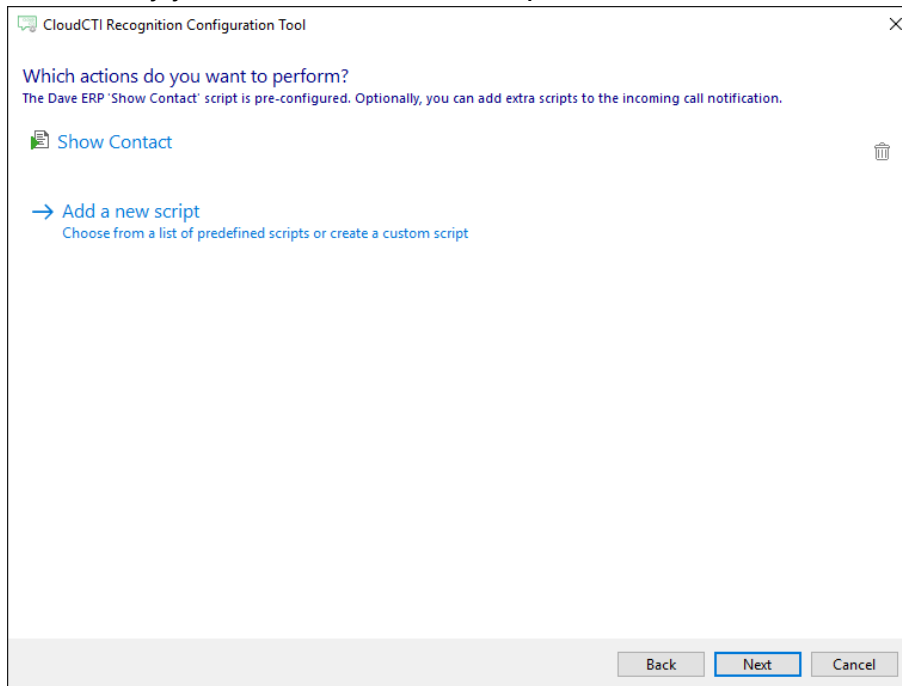
United States

The actions you have configured so far

F2 Pause 1000 Pause 1000 Ctrl + F Pause 1000 Pause 1000 Shift + Tab Pause 250 Recognition Contact code * Pause 250 Enter



Test script Back Next Cancel

7) Additionally you can add additional scripts. Click 'next' to continue.



CloudCTI Recognition Configuration Tool

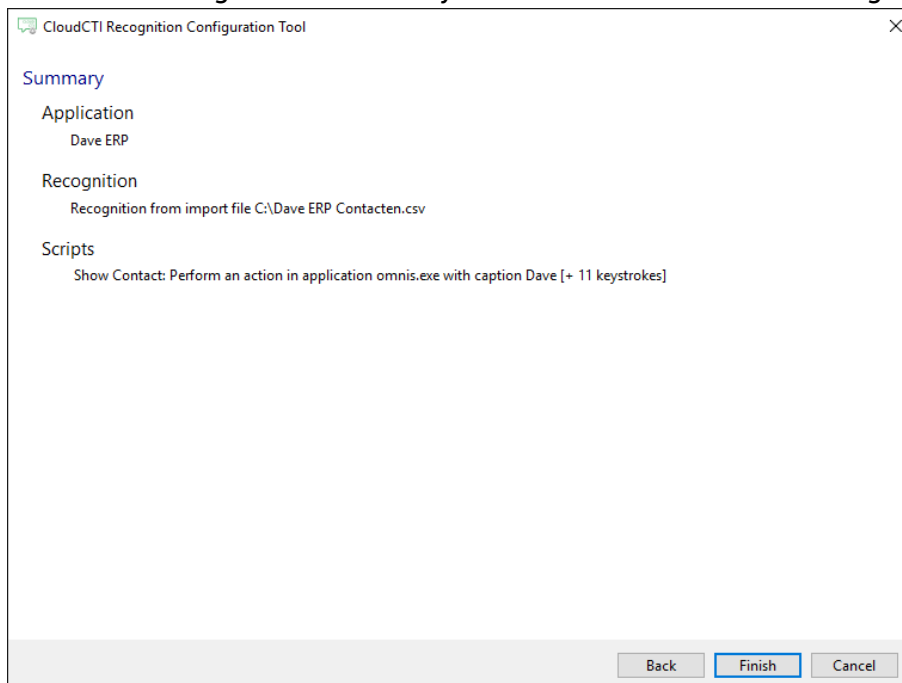
Which actions do you want to perform?
The Dave ERP 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.

 Show Contact 

→ Add a new script
Choose from a list of predefined scripts or create a custom script

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8) Check the configuration summary and click finish to add the recognition from Dave ERP.



CloudCTI Recognition Configuration Tool

Summary

Application
Dave ERP

Recognition
Recognition from import file C:\Dave ERP Contacten.csv

Scripts
Show Contact: Perform an action in application omnis.exe with caption Dave [+ 11 keystrokes]

Back Finish Cancel