

How to configure caller recognition and screen-pop for:

Efficy

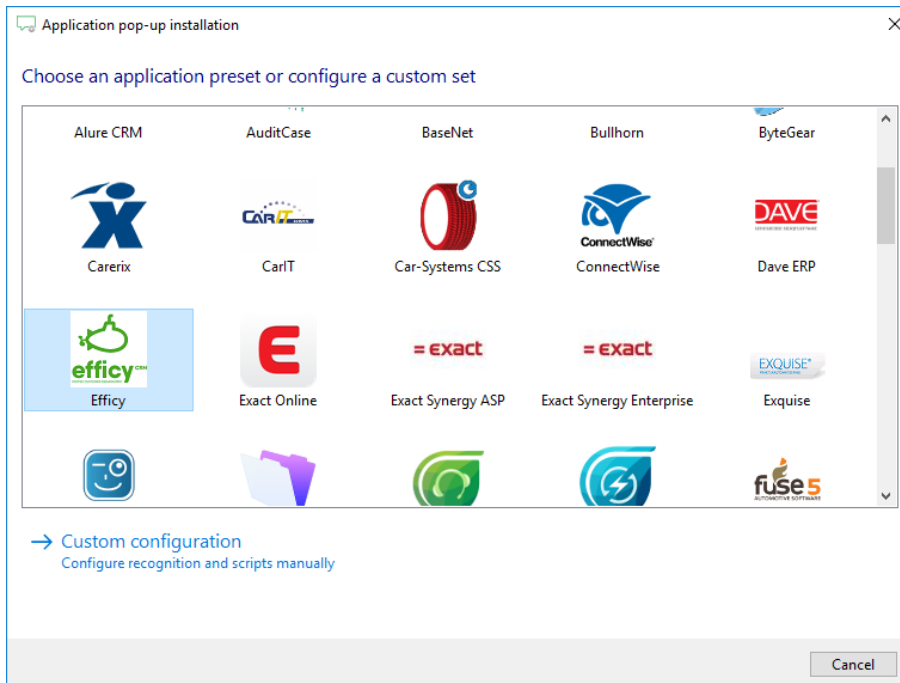
Supported versions:

Contact replication method:

Screen pop method: Url

Configuration steps

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



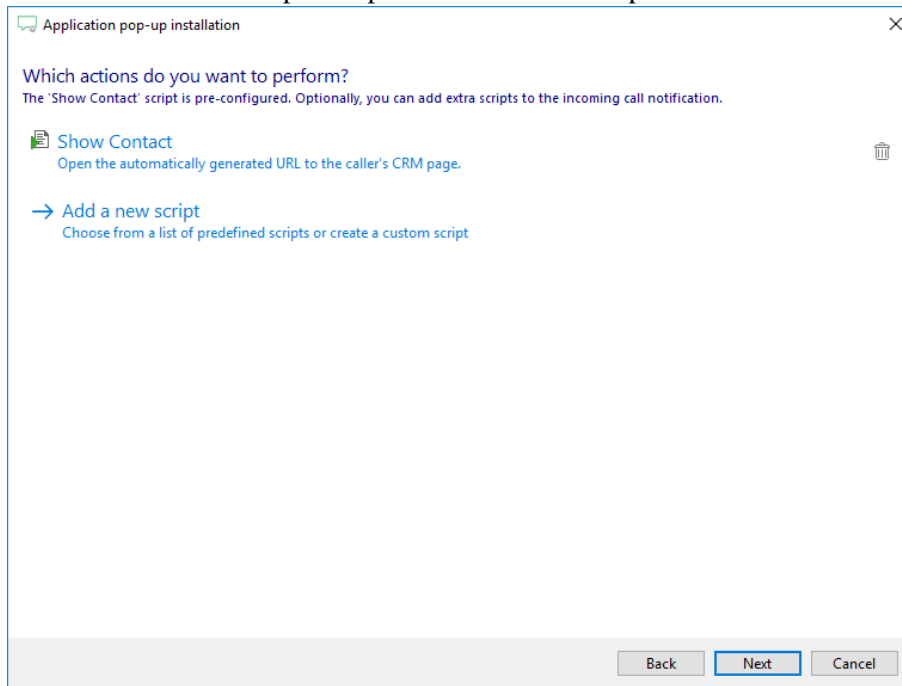
- 2) Enter your Efficy username, password and fill in your Efficy URL. In version 10 and lower, this is like: <https://yourdomain.efficy.com/efficy.dll>. In version 11, the URL looks like this: <https://yourdomain.efficy.com/crm>.

The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. Below the title bar, the text "Please enter your Efficy credentials" is displayed with a small icon. There are three input fields: "Username" containing the text "username", "Password" containing a series of black dots, and "URL" containing the text "https://yourdomain.efficy.com". At the bottom of the dialog, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

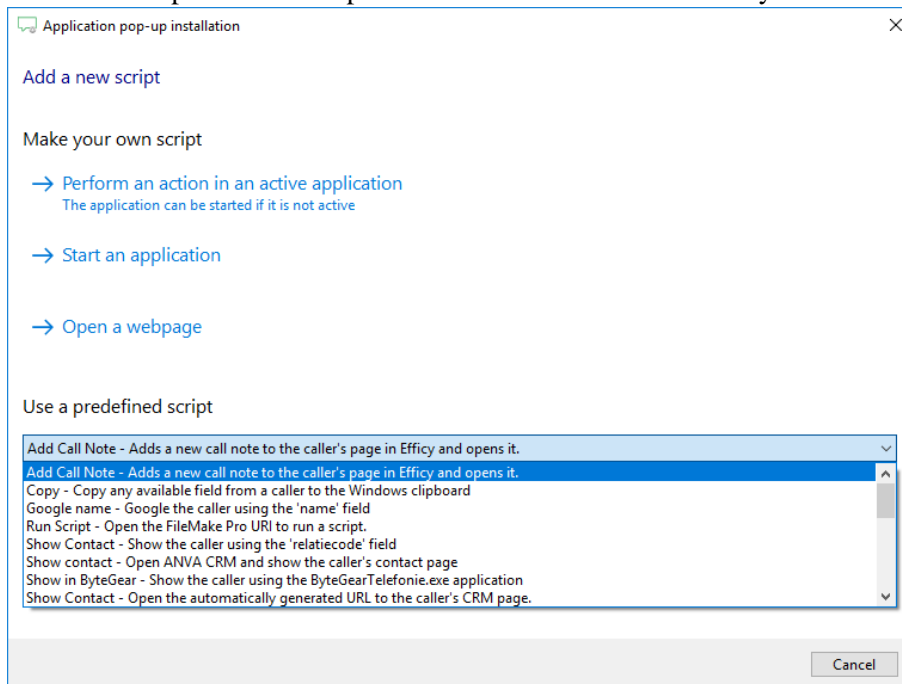
- 3) Choose which fields to display in the call notification on an incoming call.

The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. Below the title bar, the text "Client call notification" is displayed. Underneath, it says "Configure the information you want the client to show when a caller is recognized from this set". A large text area contains a preview of an "Incoming call" notification with the following fields: "Contact name: DisplayName", "Number: Caller number", and "Source: Application name". Below the text area, there is a small note: "* Windows allows a maximum of 255 characters". At the bottom of the dialog, there are two buttons: "Add recognition field" and "Add call field". At the very bottom, there are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

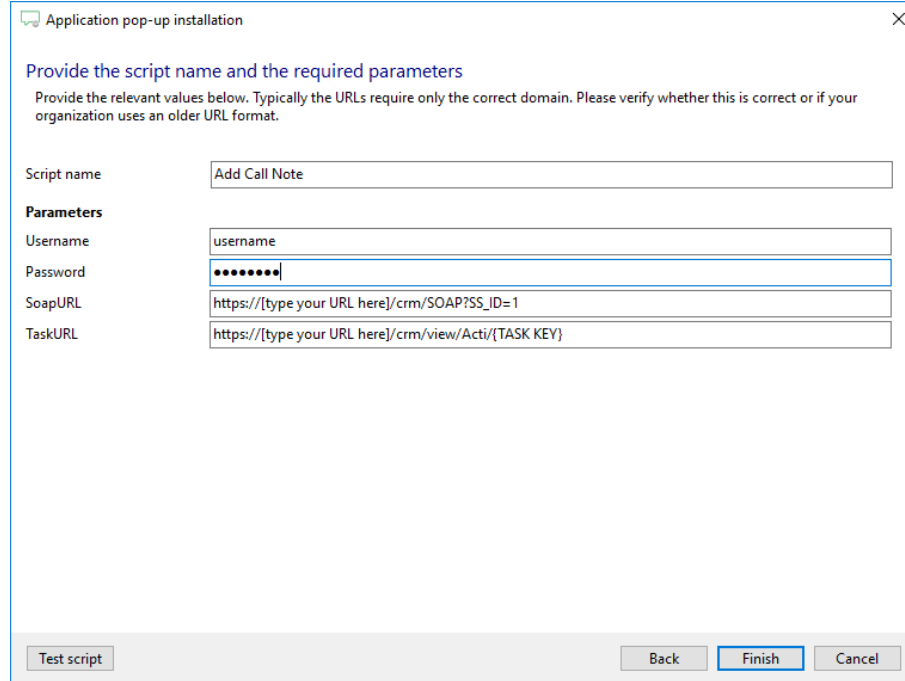
- 4) Configure the action that can be performed with an incoming call.
- a. The default script 'Show Contact' has been pre-configured. Click 'Next' to continue to step 5 or choose 'Add a new script'. Step 4b describes the script to add a call note in Efficcy to the caller.



- b. Under 'Use a predefined script' select 'Add Call Note' for Efficcy from the drop-down list.



As with step 2 enter correct Efficacy credentials and the domain of the URL's. Please note that if your organization uses the older URL to show tasks it will be of the form:
[https://\[EfficacyURL\]/efficacy.dll/dialog?page=remote/DialogOperation&action=View\('Acti', {TASK KEY}\)&close=T](https://[EfficacyURL]/efficacy.dll/dialog?page=remote/DialogOperation&action=View('Acti', {TASK KEY})&close=T)



Application pop-up installation

Provide the script name and the required parameters
 Provide the relevant values below. Typically the URLs require only the correct domain. Please verify whether this is correct or if your organization uses an older URL format.

Script name: Add Call Note

Parameters

Username: username

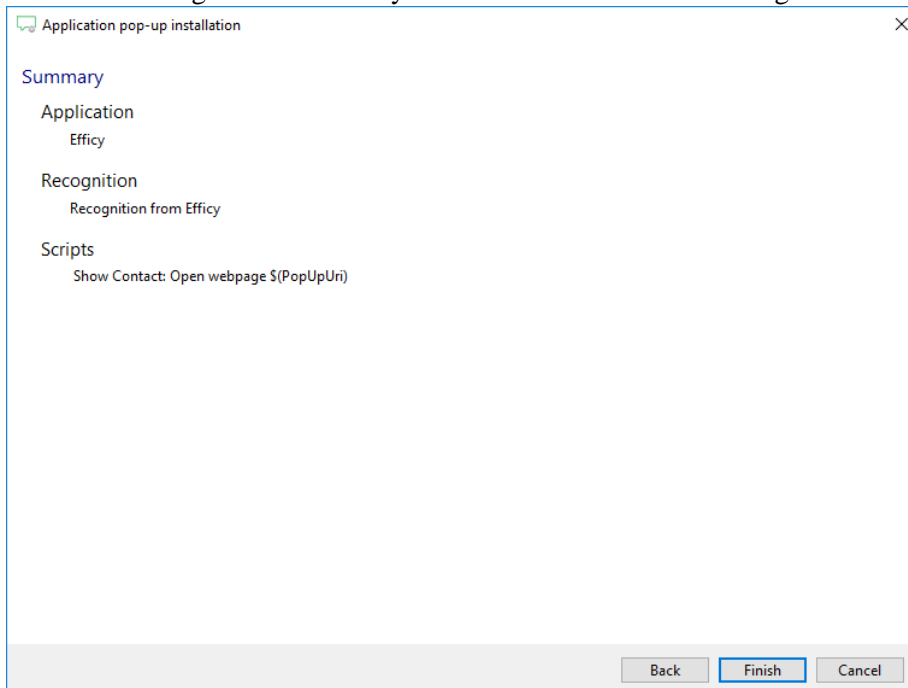
Password: [masked]

SoapURL: https://[type your URL here]/crm/SOAP?SS_ID=1

TaskURL: https://[type your URL here]/crm/view/Acti/{TASK KEY}

Buttons: Test script, Back, Finish, Cancel

5) Check the configuration summary and click finish to add the recognition from Efficacy.



Application pop-up installation

Summary

Application: Efficacy

Recognition: Recognition from Efficacy

Scripts: Show Contact: Open webpage \$(PopUpUri)

Buttons: Back, Finish, Cancel