How to configure caller recognition and screen-pop for:
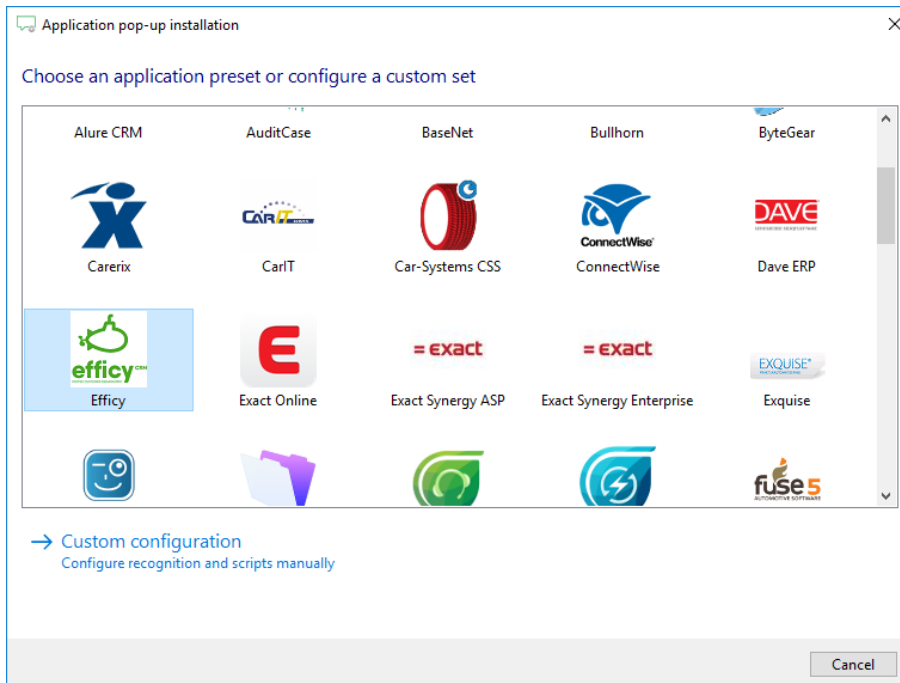
Efficy

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.

Application pop-up installation ✕

Please enter your Efficy credentials 📄

Username	username
Password	••••••••
URL	https://yourdomain.efficy.com

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

Application pop-up installation ✕

Client call notification

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

ⓘ **Incoming call**
Contact name: DisplayName
Number: Caller number
Source: Application name

* Windows allows a maximum of 255 characters

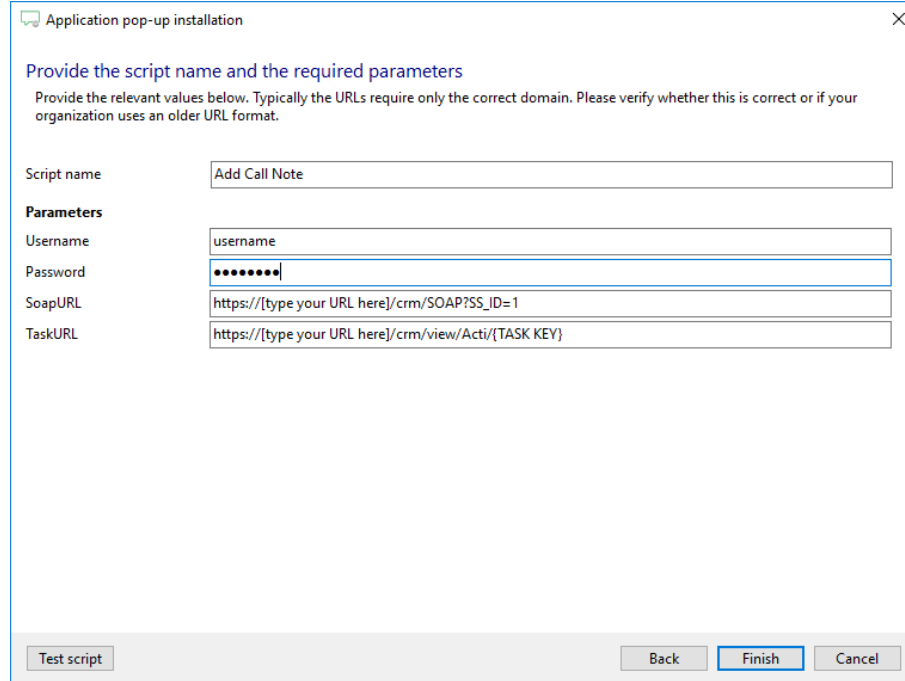Add recognition field   Add call field

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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 Efficy to the caller.
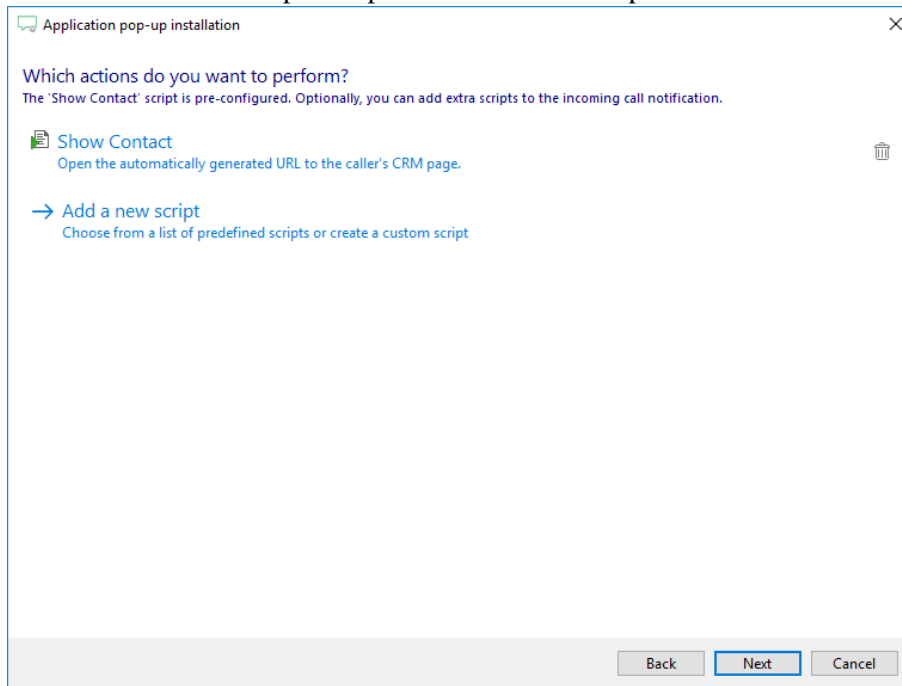
  b. Under 'Use a predefined script' select 'Add Call Note' for Efficy from the drop-down list.
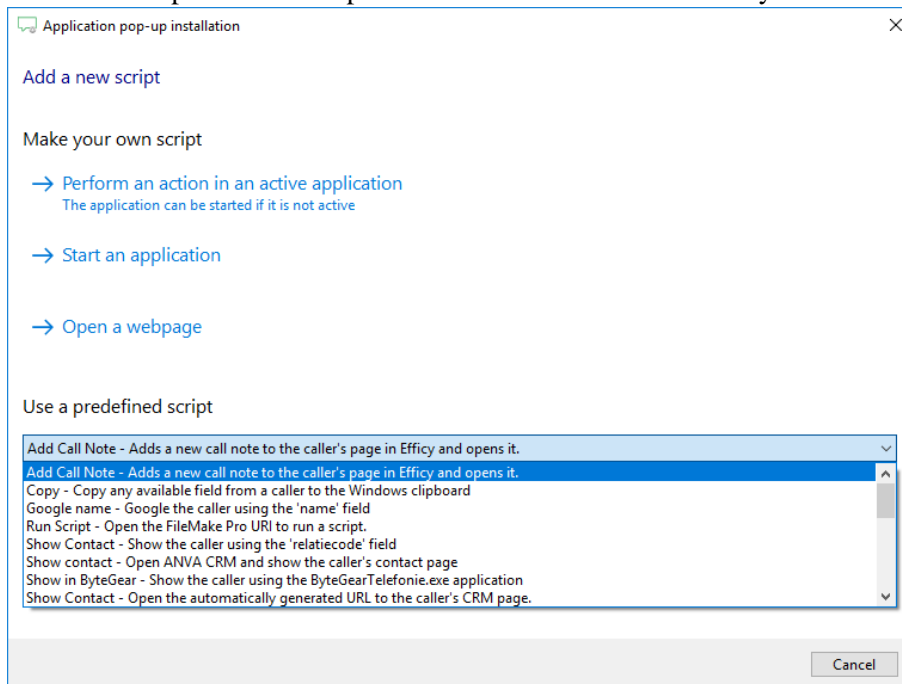
As with step 2 enter correct Efficy credentials and the domain of the URL's. Please note that if your organization uses the older URL to show tasks it will be of the form:
https://[EfficyURL]/efficy.dll/dialog?page=remote/DialogOperation&action=View('Acti', {TASK KEY})&close=T
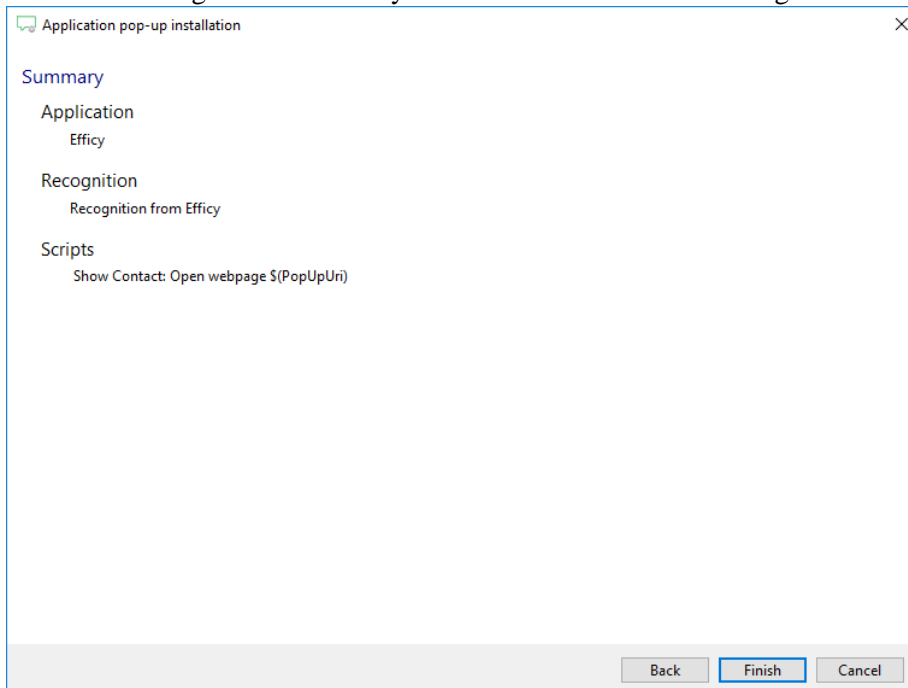
5) Check the configuration summary and click finish to add the recognition from Efficy.