

How to configure caller recognition and screen-pop for:

## Exquise Next Generation

Contact replication method: None

Screen pop method: TelefoonMonitorKoppeling tool

### Notes

For inbound calls, the integration uses the TelefoonMonitorKoppeling tool to trigger a notification popup within Exquise. This is configured by following the steps described here.

### Prerequisites

The TelefoonMonitorKoppeling tool requires an additional license from Vertimart. You can verify whether the license is active for your account by the presence of the checkboxes outlined below. These should both be checked! If you don't have the checkboxes contact [info@vertimart.nl](mailto:info@vertimart.nl) and inquire about the telephony license.

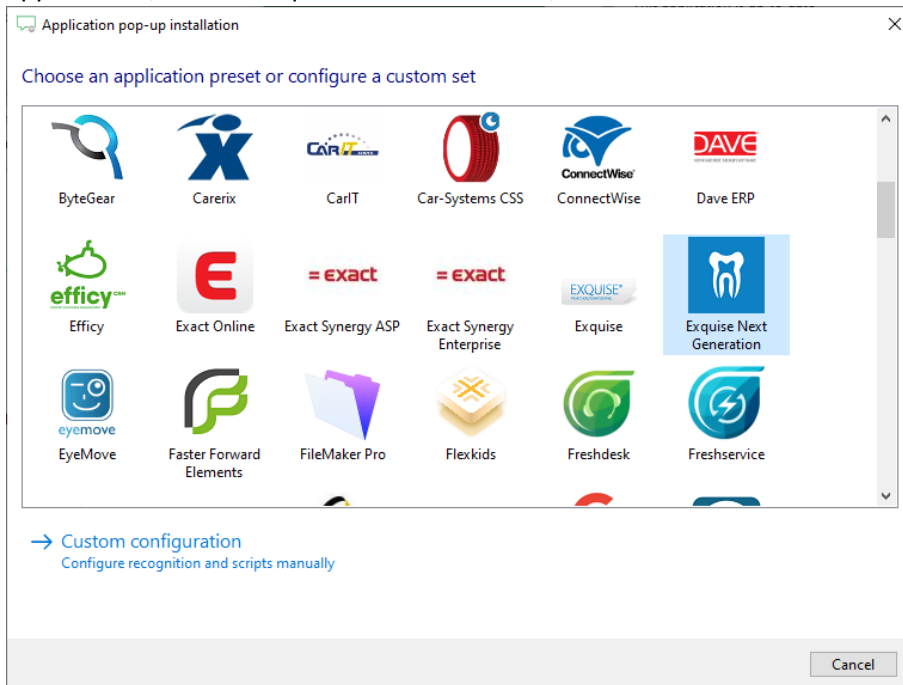
The screenshot shows the configuration page for 'E-mail, sms en bellen' in the Backoffice. The page is divided into several sections:

- E-mailinstellingen:** Includes fields for 'E-mailadres waarmee u gaat versturen (afzender):' (set to info@vertimart.nl), 'Naam van afzender (optioneel):', and 'Kopie van e-mails gaan naar (BCC):'. A 'Verstuur een test e-mail' button is present.
- Overige e-mailinstellingen:** Contains two checkboxes: 'In e-mails met afspraak informatie mag de afspraakduur vermeld worden' and 'In e-mails met patiënt informatie mag de geboortedatum vermeld worden'.
- Sms-instellingen:** Includes 'Afzender (bijvoorbeeld uw 06-):' (set to Uw Tandarts) and 'Vaste tekst achter sms bericht:'. A checkbox 'Sms-berichten mogen langer zijn dan 160 karakters (Let op; dit kan resulteren in hogere kosten)' is present.
- Telefoon Settings:** This section is highlighted with a green box and contains two checkboxes: 'Inkomende gesprekken historie aanzetten' and 'Uitgaande gesprekken icoon tonen in patiëntkaart'.
- Let op: E-mails met uw eigen email adres als Afzender?:** A warning box explaining SPF record requirements and the importance of using the correct sender email address.

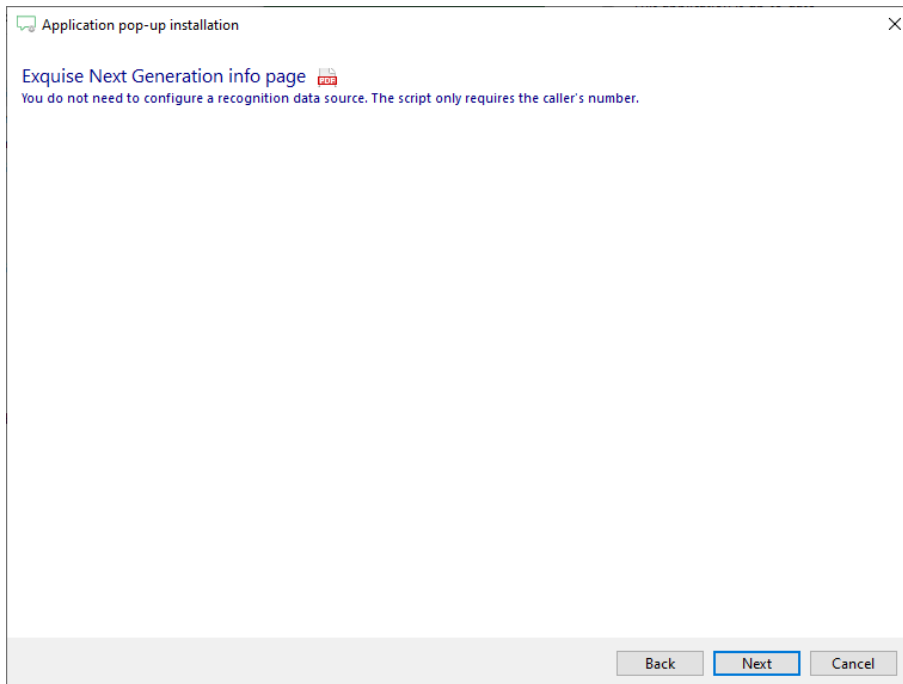
To complete the integration, you will need to specify the location of the file TelefoonMonitorKoppeling.exe. If you do not have this tool, or do not know its location please contact [info@vertimart.nl](mailto:info@vertimart.nl). They can install the tool for you.

## Configuraton steps

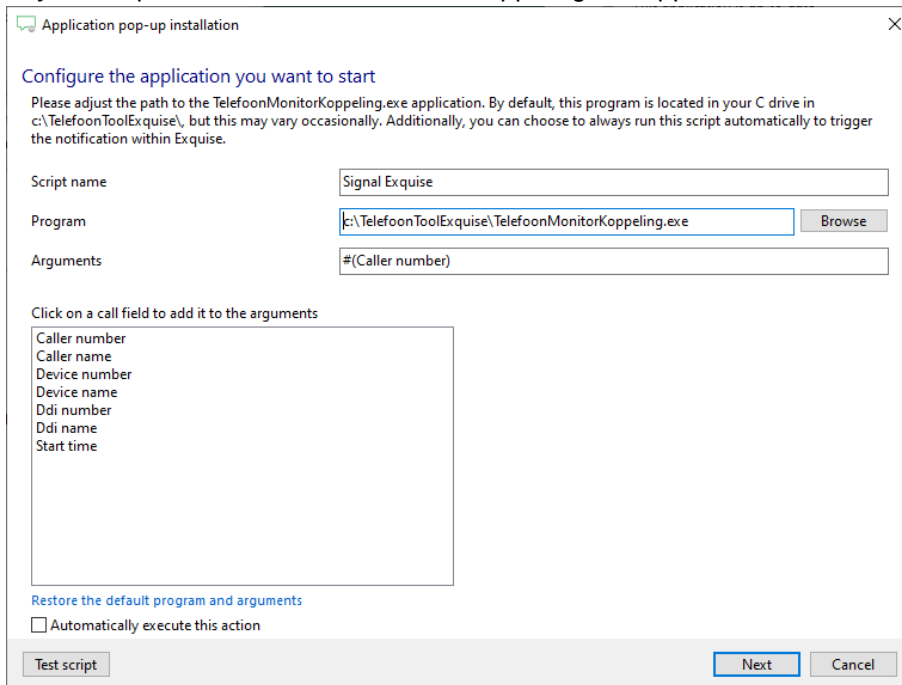
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Exquisite Next Generation, as shown below.



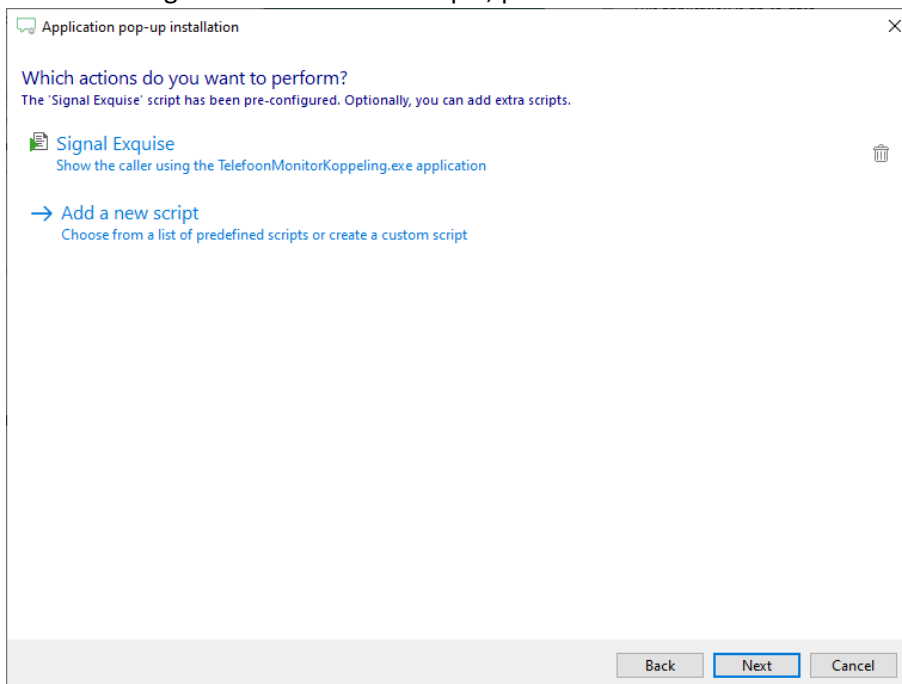
- 2) The integration works with only the caller's number and therefore does not require any recognition. Click 'next' to continue.



3) Adjust the path to the TelefoonMonitorKoppeling.exe application.



4) You can change or add additional scripts, press 'Next' to continue.



5) Check the configuration summary and click 'Finish' to add the integration with the application.

