

How to configure caller recognition and screen-pop for:

Faster Forward Elements

Supported versions: Faster Forward Elements

Contact replication method: API

Screen pop method: URI

Prerequisites

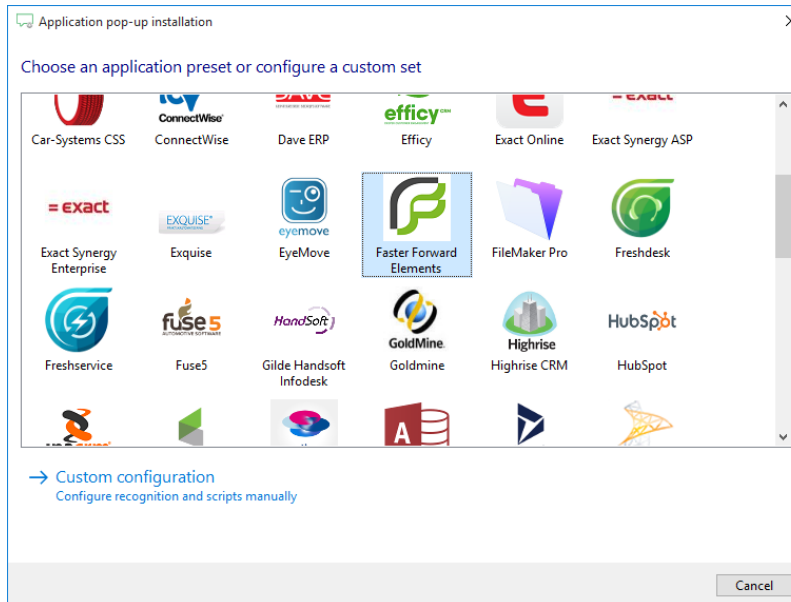
To replicate data from Faster Forward Elements via the API, please send a mail to support@fasterforward.nl and request the API to be enabled for your organization. You will receive an xml file specifying a username and 'secret'. With those, you can follow the steps in the wizard.

Notes

For outbound dialing, simply click the hyperlinked phone numbers (which use the 'callto' protocol).

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 'Faster Forward Elements', as shown below.



- 2) From the XML file, fill in the <username> tagged value in the 'Username' edit box, the <secret> value in the 'Secret' edit box and fill in your customer name, i.e., the subdomain of your Faster Forward website URL <https://yourdomain.fasterforwardelements.nl/>, into the 'Subdomain' edit box. If you have another domain than fasterforwardelements.nl you can add the full website URL into the 'Subdomain' edit box. If you have an organization number you can fill in the 'Organization number' edit box, else you can leave it empty.

The screenshot shows the same window as before, but now it displays a form titled 'Please enter your FasterForward Elements info'. The form has four input fields: 'Username', 'Secret', 'Subdomain', and 'Organization number'. At the bottom of the window, there are three buttons: 'Back', 'Next', and 'Cancel'.

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

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. The main heading is 'Client call notification'. Below it, a sub-heading reads 'Configure the information you want the client to show when a caller is recognized from this set'. A large text box contains the following text: 'Incoming call', 'Person1: Person1', 'Person2: Person2', 'Organisation: Organisation', and 'Source: Application name'. Below the text box, a small note states '* Windows allows a maximum of 255 characters'. At the bottom of the text box area are two buttons: 'Add recognition field' and 'Add call field'. At the bottom of the window are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

- 4) After you have configured the default 'Show Contact' and 'Add Call Note' scripts you can add more scripts if desired or click 'next' to continue.

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. The main heading is 'Which actions do you want to perform?'. Below it, a sub-heading reads 'The FasterForward Elements 'Create Call Log' script is preconfigured. Optionally, you can add extra scripts to the incoming call notification.' There are three items listed, each with a document icon and a trash icon to its right: 'Show Contact' (with subtext 'Open the automatically generated URL to the caller's CRM page.'), 'Add Call Note' (with subtext 'Open the automatically generated URL to add a call note.'), and 'Add a new script' (with subtext 'Choose from a list of predefined scripts or create a custom script'). At the bottom of the window are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

- 4) Check the configuration summary and click finish to add the recognition from Faster Forward Elements

