How to configure caller recognition and screen-pop for:

FileMaker Pro

Supported versions: Synergy Enterprise
Contact replication method: Text / ODBC
Screen pop method: Uri link

Prerequisites

The software can recognize calling customers based on a CSV/Text export file from FileMaker and perform a screen pop to display the calling customer information details in FileMaker Pro.

How to create an TXT/CSV export file:
https://www.filemaker.com/help/15/fmp/en/index.html#page/FMP_Help/export-records.html

The screen pop action can be configured to call a FileMaker Pro URI (starting with fmp://) with calling customer information as URI parameters. Caller customer information contains call information and recognition data from the provided CSV/Text export e.g. like the recognized customer Name or ID. The FileMaker Pro URI will be handled client-side by the FileMaker software.

More information about the FileMaker Pro URI:
https://www.filemaker.com/help/14/fmp/en/html/sharing_data.17.6.html

The FileMaker Pro URI refers to a FileMaker file/script to display information to the user, and can be modified depending on your business needs. The script is called client-side from the user's desktop. The user must be signed in to FileMaker Pro.

For more information about how to create a FileMaker script:
http://help.filemaker.com/app/answers/detail/a_id/14412/kw/script

If choose to use a CSV/Text file, you should determine a standard export layout containing at least a name, one-or-more phone numbers and additional fields to use in the FileMaker Pro URI, for example a unique customer ID. Make sure that the file is stored on the PC where the recognition tool is installed.

Notes

You can add a call button in FileMaker Pro and use the standard tel URI RDF 3966 format http://www.rfc-base.org/rfc-3966.html to send a dial command.

The first time the application may request your permission to associate 'tel:' uri links with MakeCall.exe.

If no call button is present you can select a phone number and dial with the client hotkey (PAUSE).

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 'FileMaker Pro', as shown below.
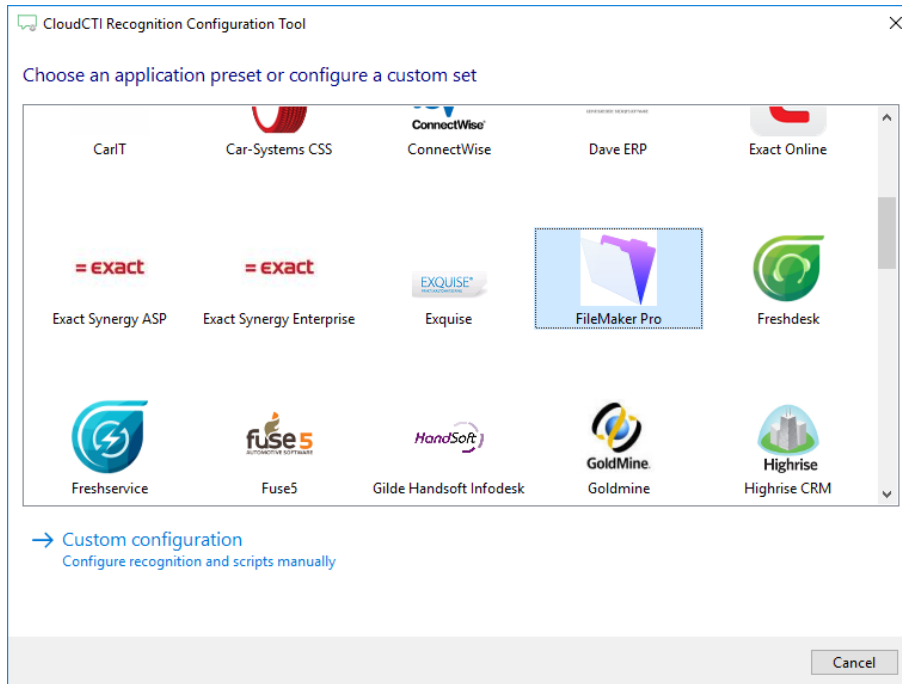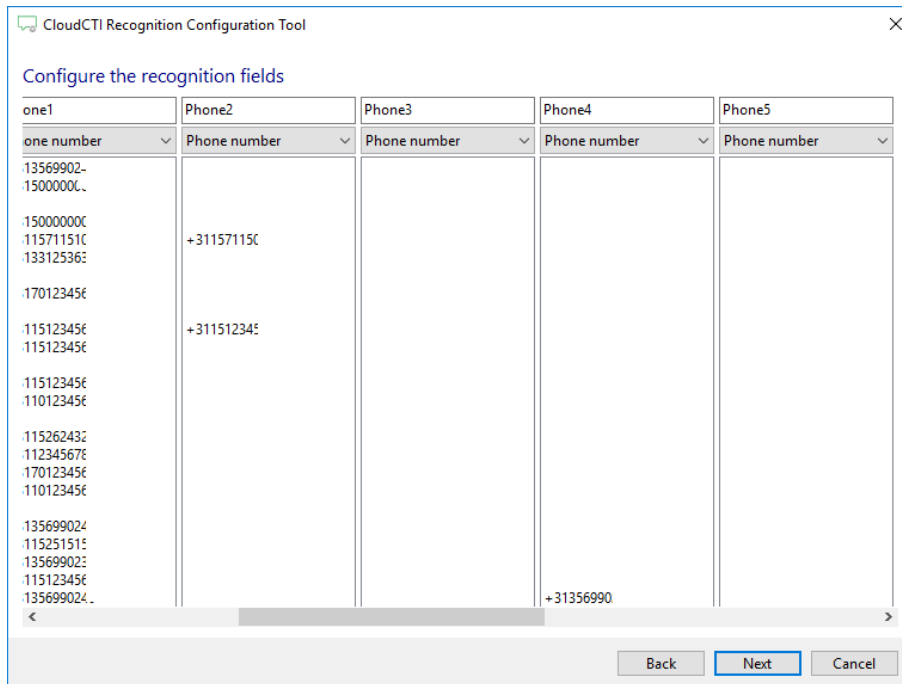

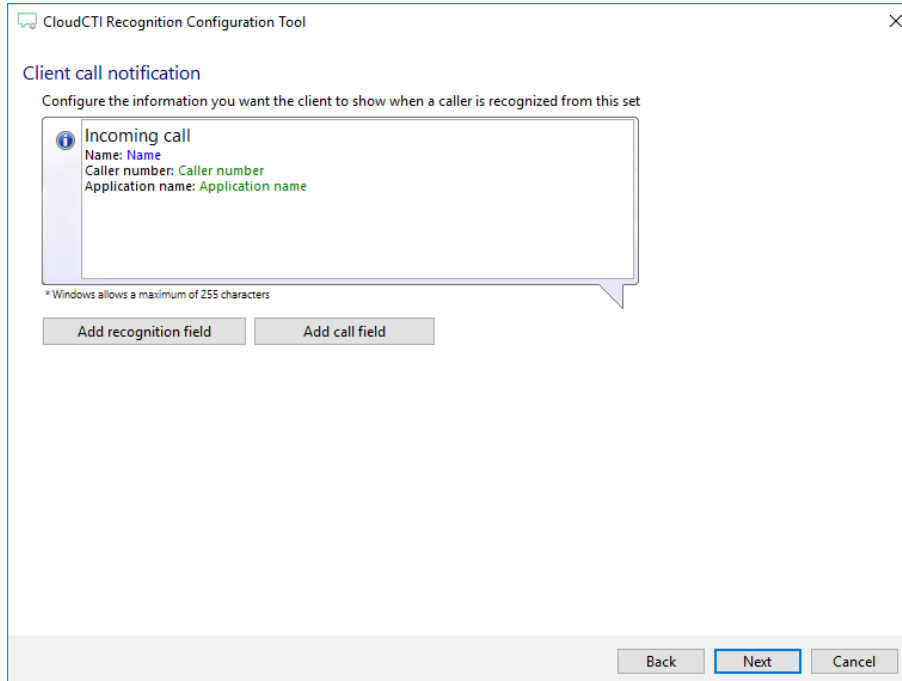2) Choose to import a CSV/Text file for caller recognition.
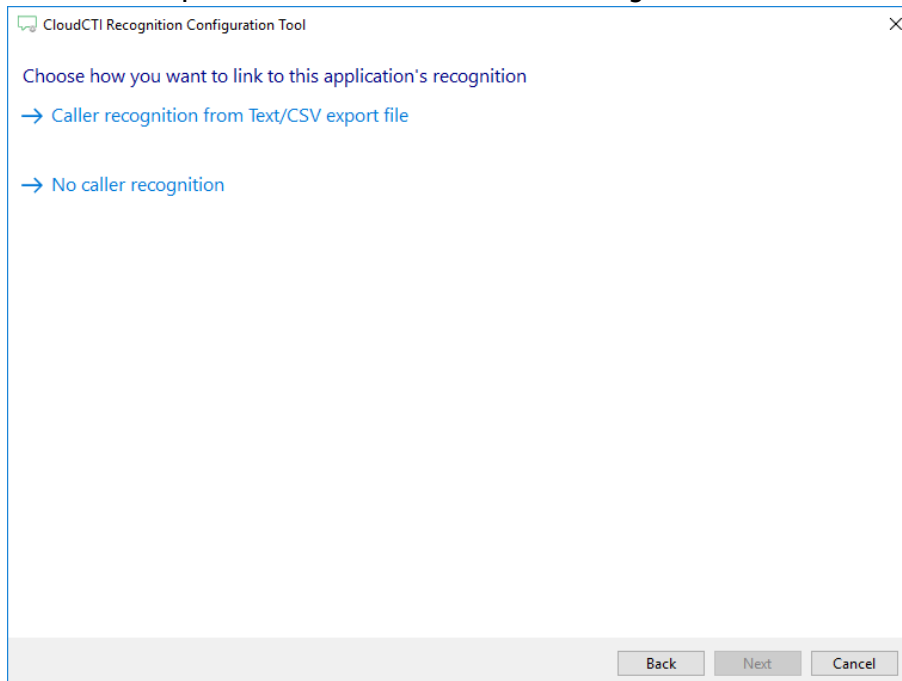
3) If you choose to use caller recognition, select the FileMaker Pro export file.
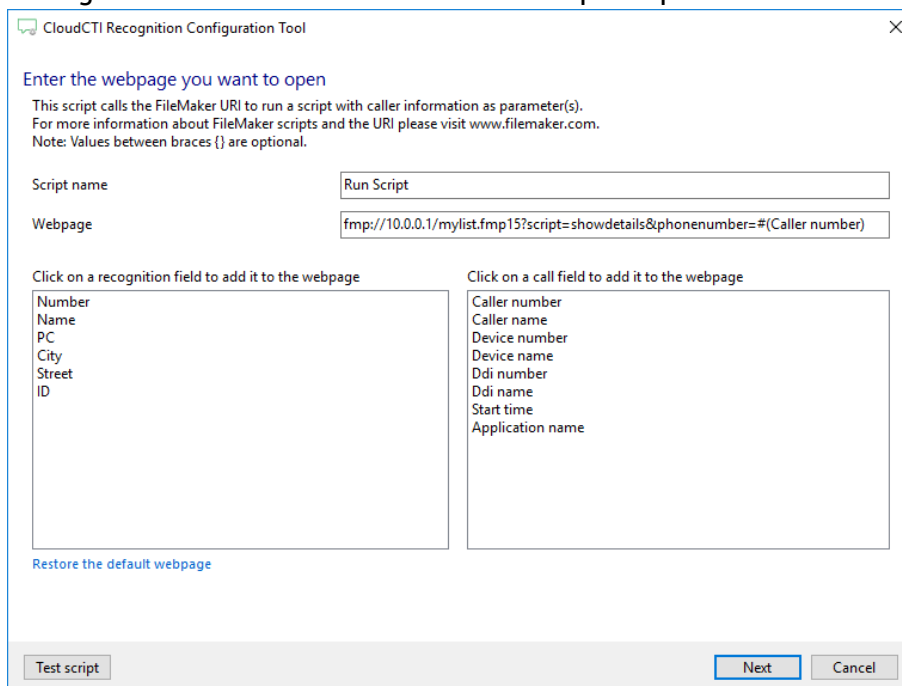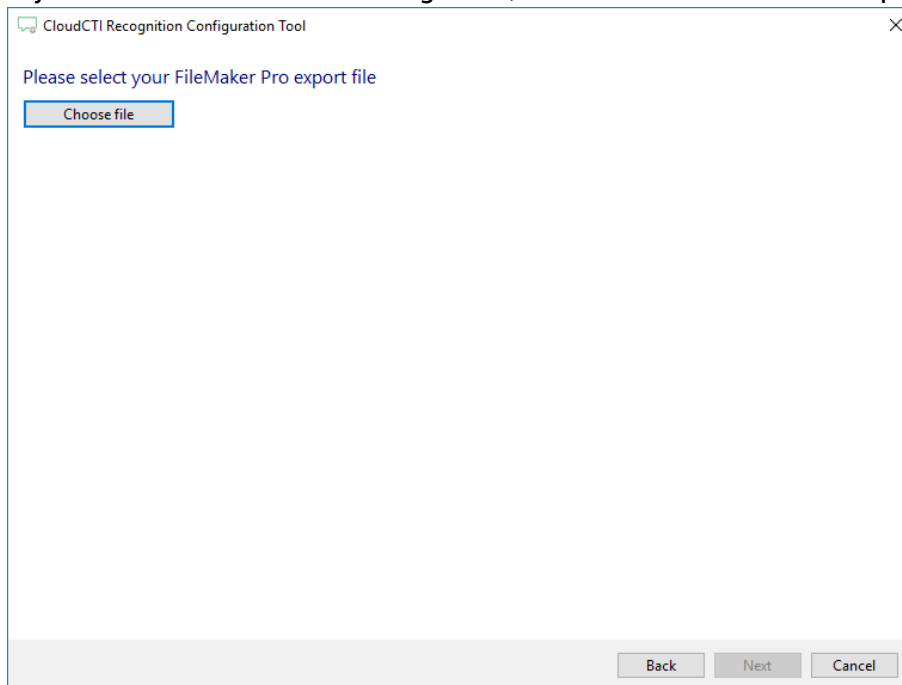

4) The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue.
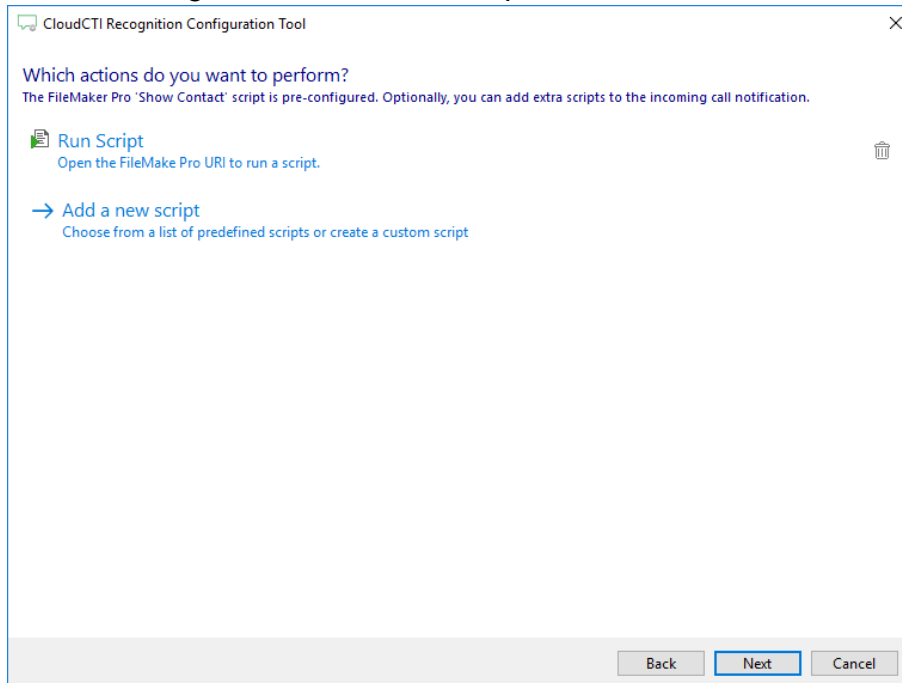
5) Choose which fields to display in the call notification on an incoming call.

6) Configure the FileMaker Pro URI and the required parameters.

7) You can change or add additional scripts

8) Check the configuration summary and click 'Finish' to add the recognition from FileMaker Pro.