

How to configure caller recognition and screen-pop for:

Gilde Handsoft Infodesk

Supported versions: Gilde Handsoft Infodesk Contact replication method: CSV/TXT export Screen pop method: DDE commands

Prerequisites

To recognize calling customers, the Recognition Tool requires a CSV/TXT export, containing a name, phone numbers and a unique search code, called "KorteNaam". This field "KorteNaam" is used in the DDE Command to open the contact card.

Notes

For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.



Configuration steps

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Gilde Handsoft Infodesk', as shown below.



2) Select the TXT/CSV export file to use

and CloudCTI Recognition Configuration Tool		
Please select you	ır Gilde Handsoft Infodesk export file	
Choose file	C:\Temp\EXPORTS\Voorbeeld.txt	
ile read successfully		
		Back Next Cancel



3) 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

🧔 CloudCTI Recognition Co	nfiguration Tool			×		
Configure the recogni	tion fields					
Number	Name	PC	City	Street		
Phone number \sim	Name \checkmark	Custom field \sim	Custom field \sim	Custom field		
+31356990230 +31671232323	Key-link B.V. D.D. Pakhuis	1411 AT 1212 AZ	Naarden Goudrijk	Energiestraat 16d Centenstraat 104		
<				>		
Back Next Cancel						

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

🤜 CloudCTI Recognition Configuration Tool	×
Client call notification	
Configure the information you want the client to show when a caller is recognized from this set	
Incoming call Name: Name KN: KorteNaam Number: Caller number Source: Application name	
* Windows allows a maximum of 255 characters	
Add recognition field Add call field	
Back	Next Cancel

5) By default, the popup is configured to open the contact card. You may leave this default. Click 'next' to continue.



🧔 CloudCTI Recognition	n Configuration Tool X
Provide the script r	name the required parameters
Script name	Open Gilde Handsoft Infodesk contact form
Parameters	
DDEService	Gilde
DDETopic	System
ExecuteMacroLine1	[GM.DDEConnector::ShowAddress('\$(KorteNaam)')]
ExecuteMacroLine2	
ExecuteMacroLine3	
ExecuteMacroLine4	
ExecuteMacroLine5	
Test script	Next Cancel

6) Check the configuration summary and click finish to add the recognition from Gilde Handsoft Infodesk

📀 🥽 Application pop-up installation	
Finish the application pop-up setup	
Application	
Gilde Handsoft Infodesk	
Recognition	
Recognition from import file C:\Voorbeeld.txt	
Action	
Open Gilde Handsoft Infodesk contact form	
	Finish Cancel