How to configure caller recognition and screen-pop for:

In2CRM

Contact replication method: None
Screen pop method: CRMCall.exe application

Prerequisites

In2CRM has its own user interface for the handling of incoming calls. To connect your telephony to your In2CRM application you only have to make sure the 'CRMCall.exe' application is available to all users.
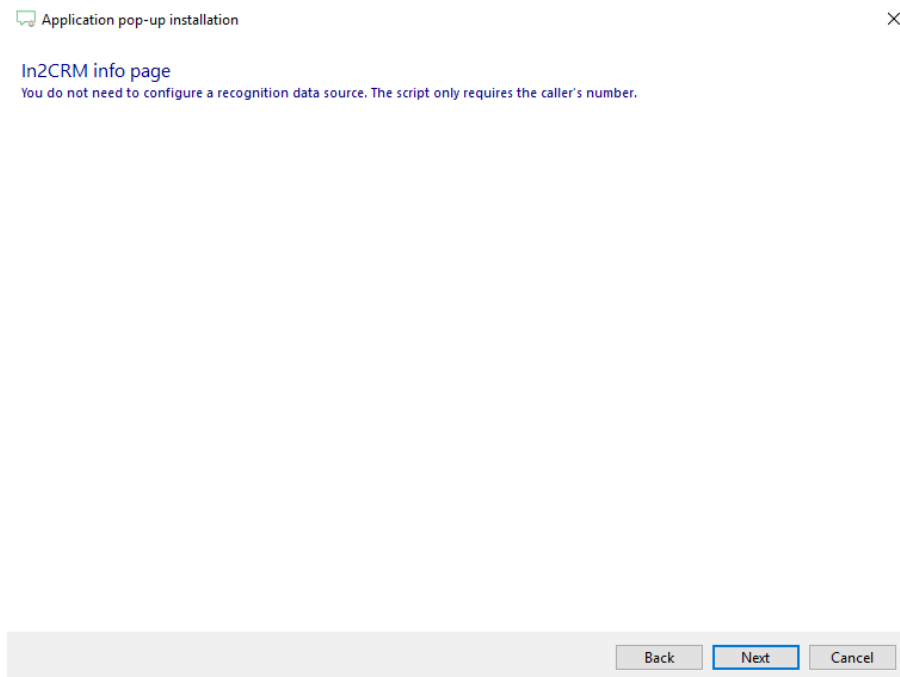
Notes

For outbound dialing you can use the 'CRMCall.exe' application which is installed with your client. This application can usually be found in the system folder within In2CRM.
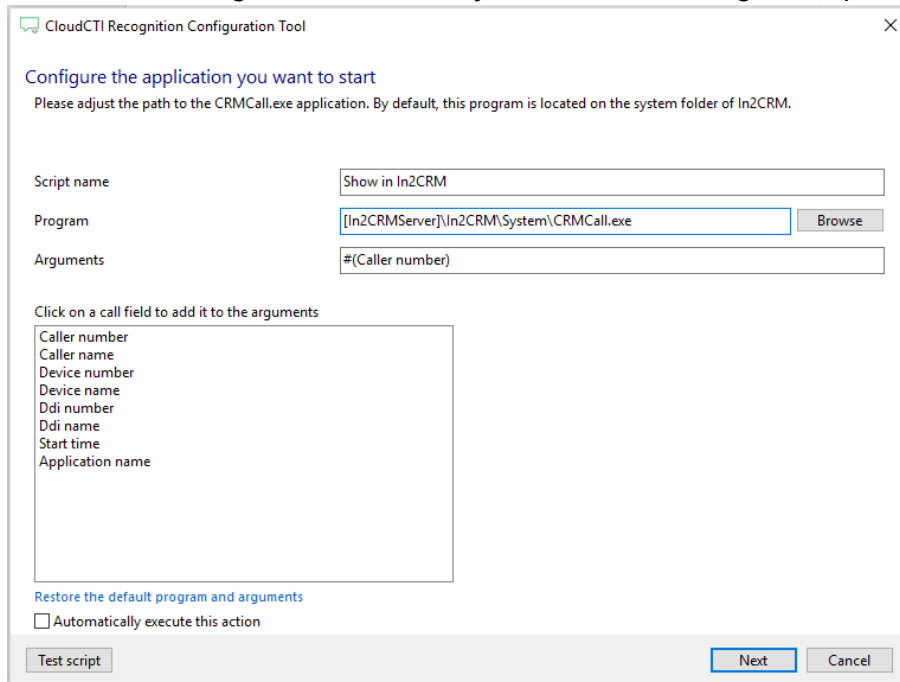
Configuration steps

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 'In2CRM', as shown below.
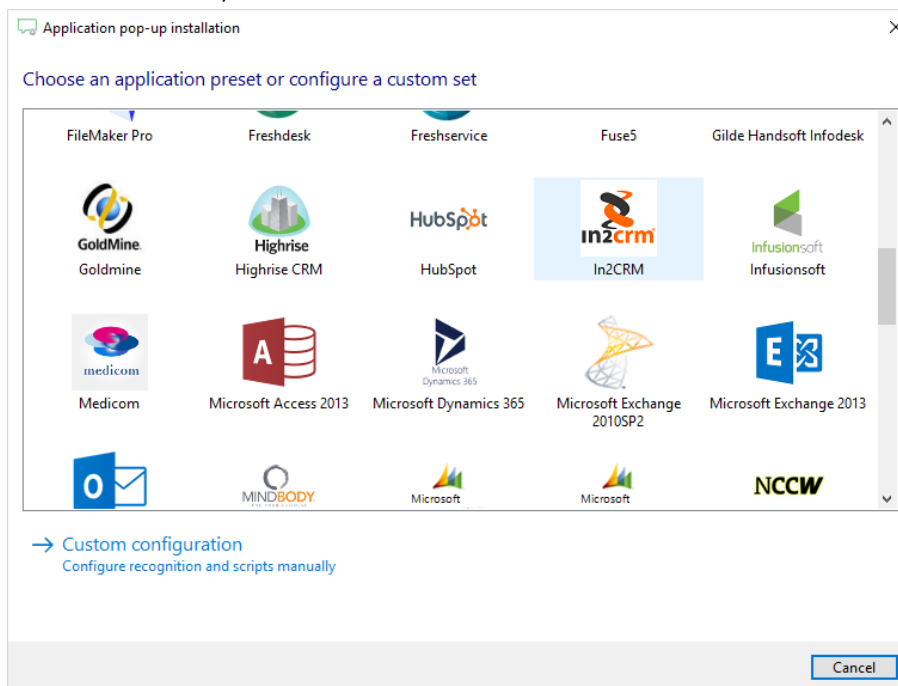
2) The In2CRM integration works with only the caller's number and therefore does not require any recognition. Click 'next' to continue.

Application pop-up installation   ✕

In2CRM info page
You do not need to configure a recognition data source. The script only requires the caller's number.

Back   Next   Cancel

3) On an incoming call the client can automatically launch CRMCall.exe with the caller's number as the argument. Please adjust to a valid setting of the path to the executable.

CloudCTI Recognition Configuration Tool   ✕

Configure the application you want to start
Please adjust the path to the CRMCall.exe application. By default, this program is located on the system folder of In2CRM.

Script name   Show in In2CRM

Program   [In2CRMServer]\In2CRM\System\CRMCall.exe   Browse

Arguments   #(Caller number)

Click on a call field to add it to the arguments

Caller number
Caller name
Device number
Device name
Ddi number
Ddi name
Start time
Application name

Restore the default program and arguments
☐ Automatically execute this action

Test script   Next   Cancel

4) After you have configured the default 'Show in In2CRM' script you can add more scripts if desired or click 'next' to continue.
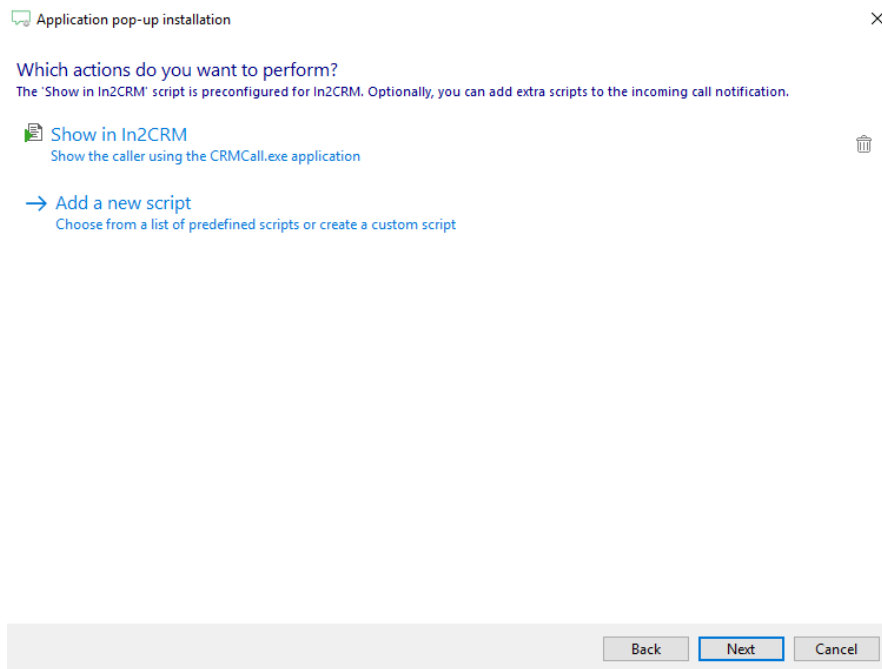
5) Check the configuration summary and click finish to add the integration with In2CRM.