

How to configure caller recognition and screen-pop for:

## MINDBODY

Supported versions: [www.mindbodyonline.com](http://www.mindbodyonline.com)

Contact replication method: Excel export

Screen pop method: URL

### Prerequisites

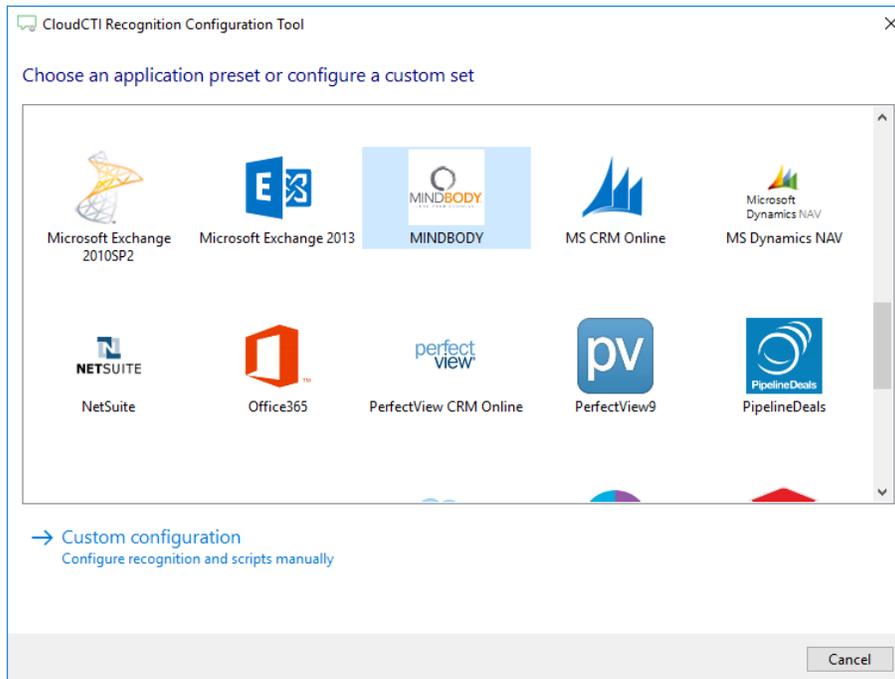
For client recognition on inbound phonecalls, it's required to provide an Excel export from your MINDBODY clients. Go to "Reports > Clients >MailingLists" to export all clients to an Excel file. The XLS file must be in valid Excel format and should contain at least the fields "First name", "Last name", "ID", "Mobile phone","Home phone","Work phone".

### Notes

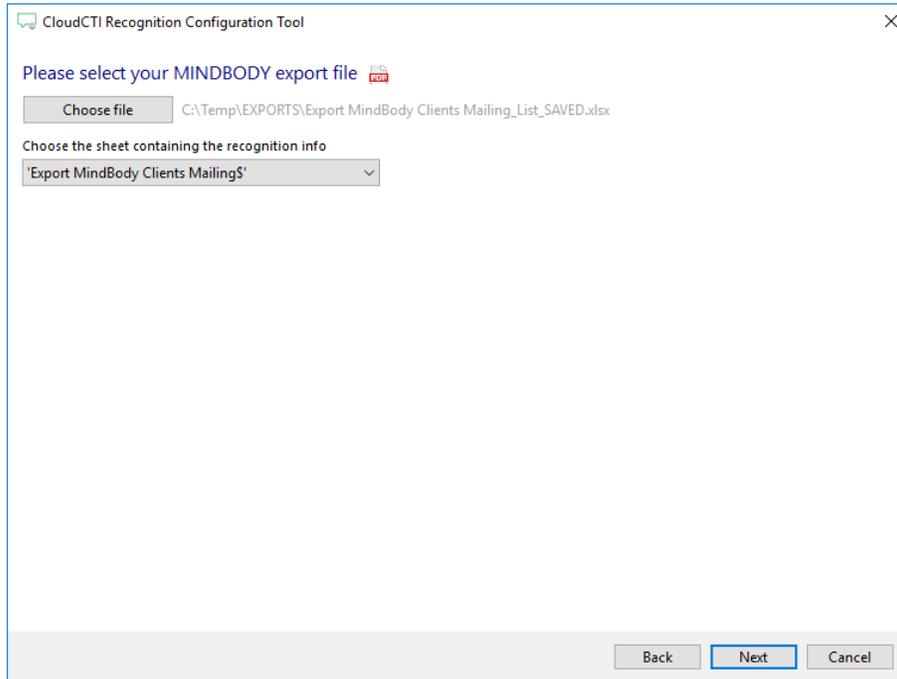
Highlight a phonenumber within MINDBODY and press the dial hotkey (default PAUSE) to dial.

## 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 'MINDBODY', as shown below.



- 2) Select the MINDBODY export from which the client data should be retrieved. Click 'next' to continue



CloudCTI Recognition Configuration Tool

Please select your MINDBODY export file 

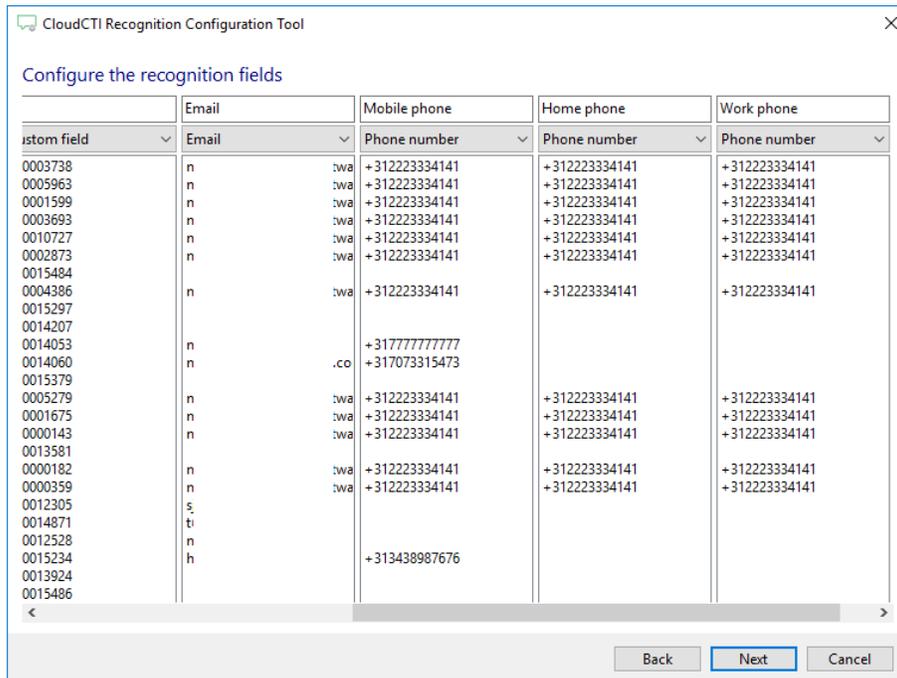
Choose file C:\Temp\EXPORTS\Export MindBody Clients Mailing\_List\_SAVED.xlsx

Choose the sheet containing the recognition info

'Export MindBody Clients Mailing\$'

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- 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 Configuration Tool

Configure the recognition fields

| Custom field | Email | Mobile phone      | Home phone    | Work phone    |
|--------------|-------|-------------------|---------------|---------------|
|              | Email | Phone number      | Phone number  | Phone number  |
| 0003738      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0005963      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0001599      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0003693      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0010727      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0002873      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0015484      |       |                   |               |               |
| 0004386      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0015297      |       |                   |               |               |
| 0014207      |       |                   |               |               |
| 0014053      | n     | +317777777777     |               |               |
| 0014060      | n     | .co +317073315473 |               |               |
| 0015379      |       |                   |               |               |
| 0005279      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0001675      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0000143      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0013581      |       |                   |               |               |
| 0000182      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0000359      | n     | :wa +312223334141 | +312223334141 | +312223334141 |
| 0012305      | s     |                   |               |               |
| 0014871      | ti    |                   |               |               |
| 0012528      | n     |                   |               |               |
| 0015234      | h     | +313438987676     |               |               |
| 0013924      |       |                   |               |               |
| 0015486      |       |                   |               |               |

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

The screenshot shows a window titled "CloudCTI Recognition Configuration Tool" with a close button (X) in the top right corner. The main heading is "Client call notification". Below this, it says "Configure the information you want the client to show when a caller is recognized from this set".

There is a large text area containing the following information:

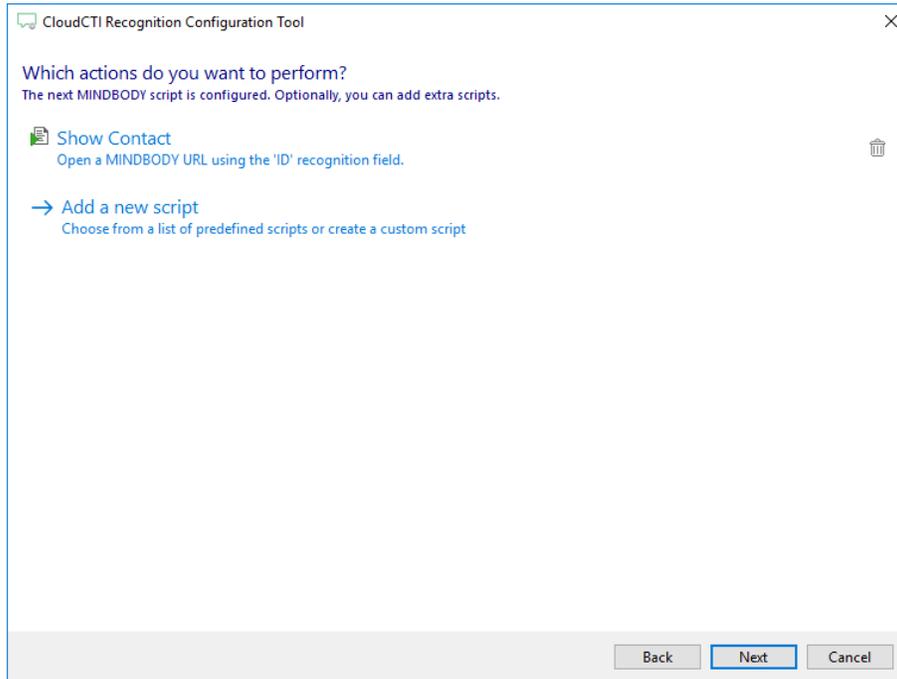
- Incoming call** (with an information icon)
- Name: *First name Last name*
- Number: *Caller number*
- Source: *Application name*

Below the text area, there is a note: "\* Windows allows a maximum of 255 characters".

At the bottom of the text area, there are two buttons: "Add recognition field" and "Add call field".

At the bottom of the window, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

- 5) By default, the popup is configured to open the Client Home page within MINDBODY. You may leave this default. Click 'next' to continue.



- 6) Check the configuration summary and click finish to add the recognition from MINDBODY

