How to configure caller recognition and screen-pop for:

MINDBODY

Supported versions: 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.

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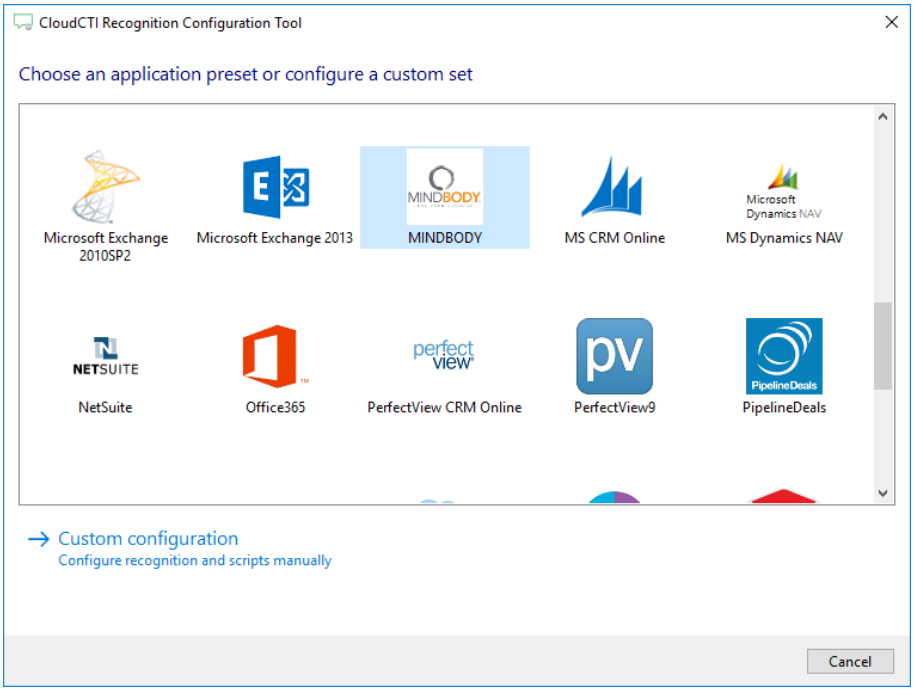
Configuration steps

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.



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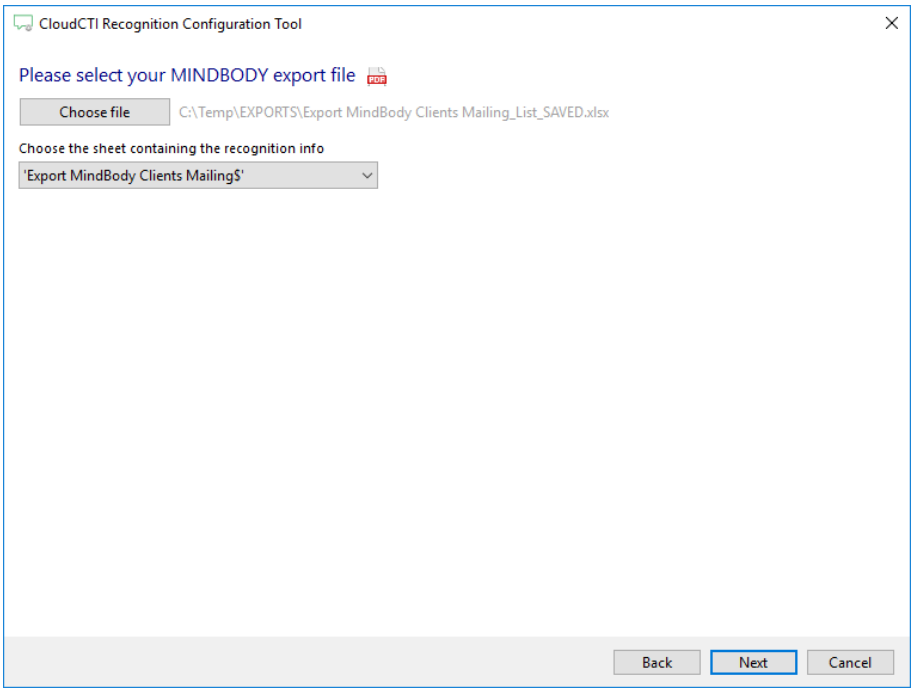
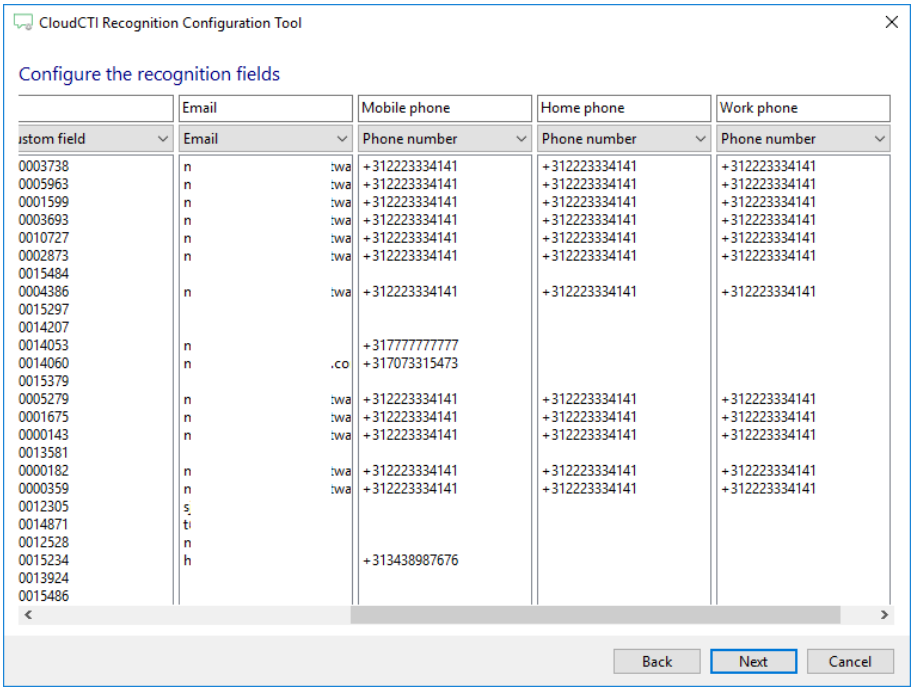
2) Select the MINDBODY export from which the client data should be retrieved. Click ‘next’ to continue



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



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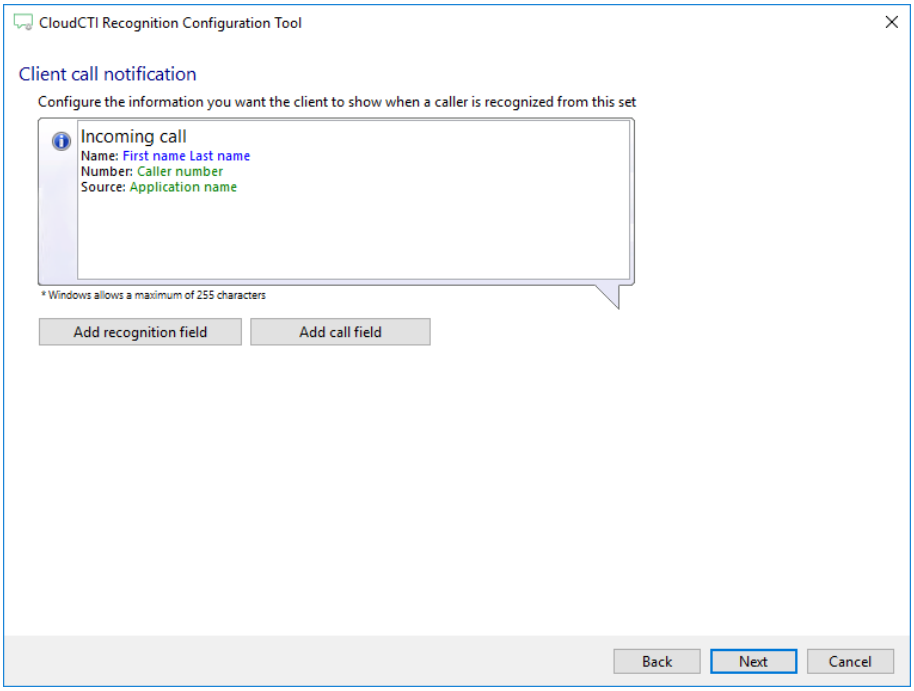
4) Choose which fields to display in the call notification on an incoming call.



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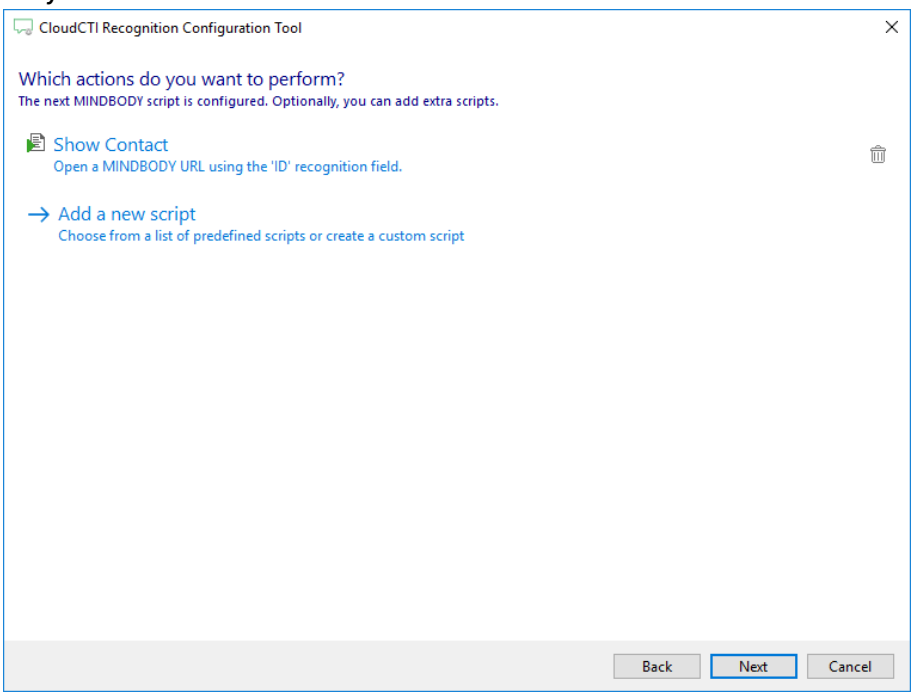
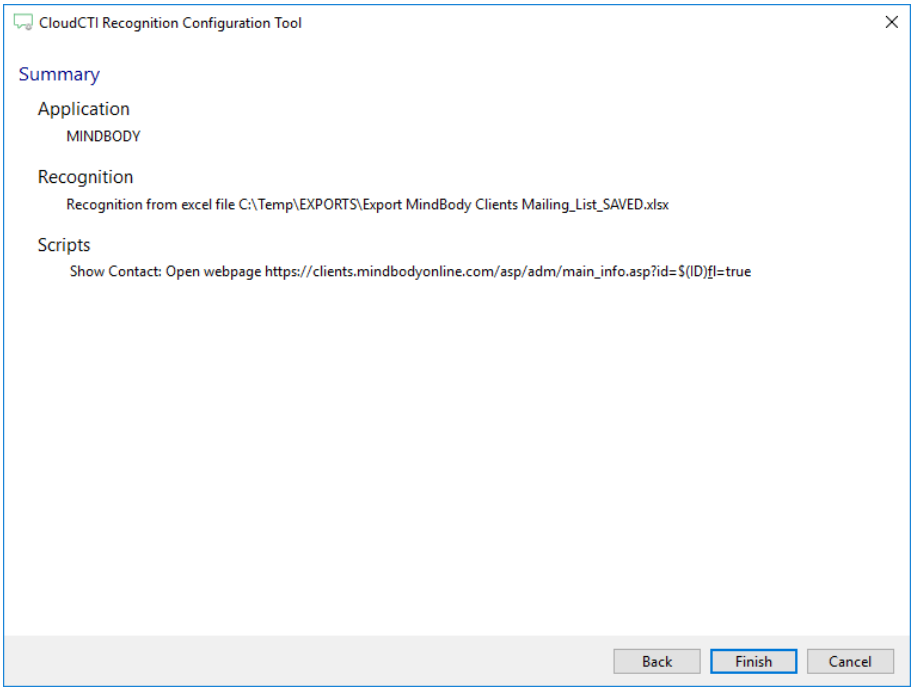
5) By default, the popup is configured to open the Client Home page within MINDBODY. You may leave this default. Click 'next' to continue.



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



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