How to configure caller recognition and screen-pop for:

## MarketSharp

Supported versions: MarketSharp Contact replication method: Export .CSV file Screen pop method: URL

### Prerequisites

Caller recognition and pop-up require a TXT/CSV export containing contact data from MarketSharp. MarketSharp supports customizable list views to create export files. Click 'Contacts' in the top ribbon and then 'Customer List View' on the left. All fields that are shown in the list view can be synchronized and shown in the notification on an incoming call (if the caller number is present in the list). Please make sure you select all possible phone fields, like in the screen shot below.



After a view has been created, set the filter to '-All Customers - ' and click the 'Export' link (highlighted with by the red square in the screenshot). If caller recognition is also desired for prospects and leads, then repeat the process for these list view as well.

#### Notes

For outbound dialing, select a phone number and use the dial hotkey.





#### **Configuration steps**

1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose 'MarketSharp', as shown below.



2) Select the CSV export file which contains the customer data and press Next.

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applications Output Output scripts		7/3/2018 1:46 AM	CSV File
Contacts.csv	~	Export files (*.csv;*.bt) Open Ci	ancel .::



3) Ensure the export file contains the fields: ContactId, Last Name, First Name and also verify all the exported phone number columns have type 'Phone number'.

Application pop-up insta	llation			×
Configure the recogni	ition fields			
ContactId	Last Name	First Name	Car Phone	Cell Phone
Custom field $\sim$	Custom field $\sim$	Custom field $\sim$	Phone number V	Phone number
7193	Aastrup	Robert		
3aef31f7-4ead-4f87-858e-0	Abrams	Lloyd		+16087923917
640	Ackerman	Shannon		
366	Adams	Clayton		
63	Adams	David		
bb398a77-12b5-441a-a1ce-	Adams	Josh		
748	Adams	Reece		
1602	Ahnemann	Dan		
520	Albright	George		
556	Allison	Anthony		
1897	Alverez	Carmen		
20c83608-23fd-4951-8829-	Amundson	John		+13197854563
219	Anderson	Dean		+16546546546
731	Anderson	Keith		
1768	Anderson	Mark		
1305	Anderson	Rickey		
689	Anderson	Ricki		
408	Anderson	Scott		
463	Angell	Lanaya		
3ce03b8d-4859-4bb9-85d0	anna	julie		+15552525525
19	Anthony Jr	Dale		
574	Arends	Henry		
1987	Arey	Becky		
37	Armstrong	Jackie		
1668	Arndt	Delbert		
<				>
			Back	Next Cancel

4) Choose which fields to display in the call notification on an incoming call. Any extra field from the export can be added by clicking 'Add recognition field'.

C Application pop-up installation	×
Client call notification	
Configure the information you want the client to show when a caller is recognized from this set	
Incoming call Name: First Name Last Name Number: Caller number Source: Application name	
* Windows allows a maximum of 255 characters	
Add recognition field Add call field	
Back Next Ca	ncel



5) The URL to the caller's MarketSharp page has been preset, but the appropriate subdomain (i.e., the first part of the URL) needs to be specified for your MarketSharp account.

Script name	Show Cont	act
Webpage	https://[SU	BDOMAIN].marketsharpm.com/ContactDetail.aspx?contactOid=\$(Contac
Click on a recognition field to add it	to the webpage	Click on a call field to add it to the webpage
ContactId Last Name First Name Car Phone Cell Phone Home Phone 2 Other Phone Other Phone Other Phone Phone 2 Primary Phone Work Phone Work Phone 2		Caller number Caller name Device number Device name Ddi number Ddi name Start time Application name

6) Optionally, additional scripts may be configured for the incoming call notification. Otherwise, click 'Next' to continue.

Same Application pop-up installation	×
Which actions do you want to perform? The MarketSharp 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.	
Show Contact Open the MarketSharp URL of the caller's page.	Î
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next	Cancel



# 7) Check the configuration summary and click finish to add the recognition from MarketSharp.

C Application pop-up installation	×
Summary	
Application	
MarketSharp	
Recognition	
Recognition from import file C:\Users\BramHeerebout\Desktop\Contacts.csv	
Scripts	
Show Contact: Open webpage https://[SUBDOMAIN].marketsharpm.com/ContactDetail.aspx?contactOid=\$(ContactId)	
Back Finish Canc	el