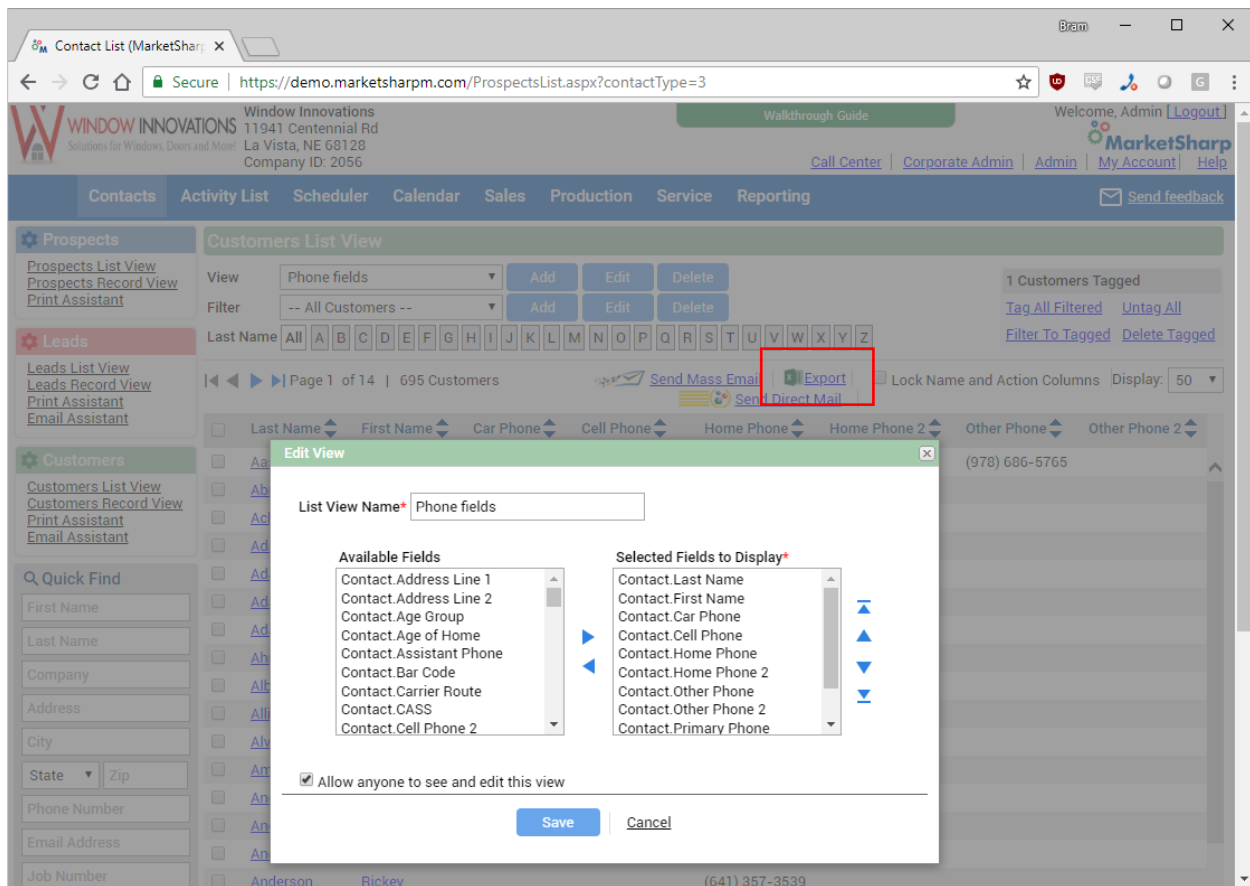How to configure caller recognition and screen-pop for:

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
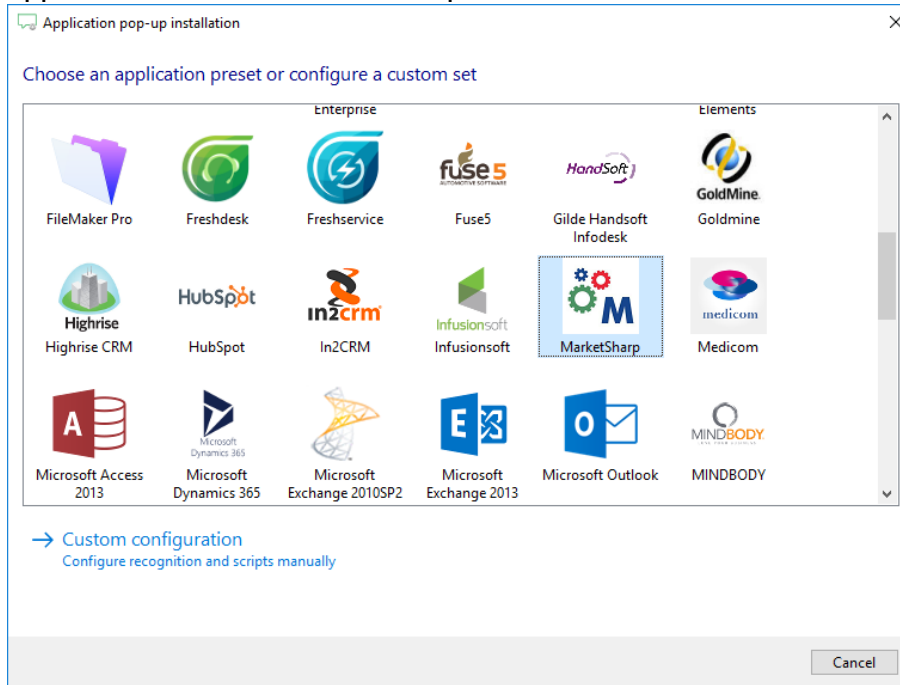in the screen shot below.

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.
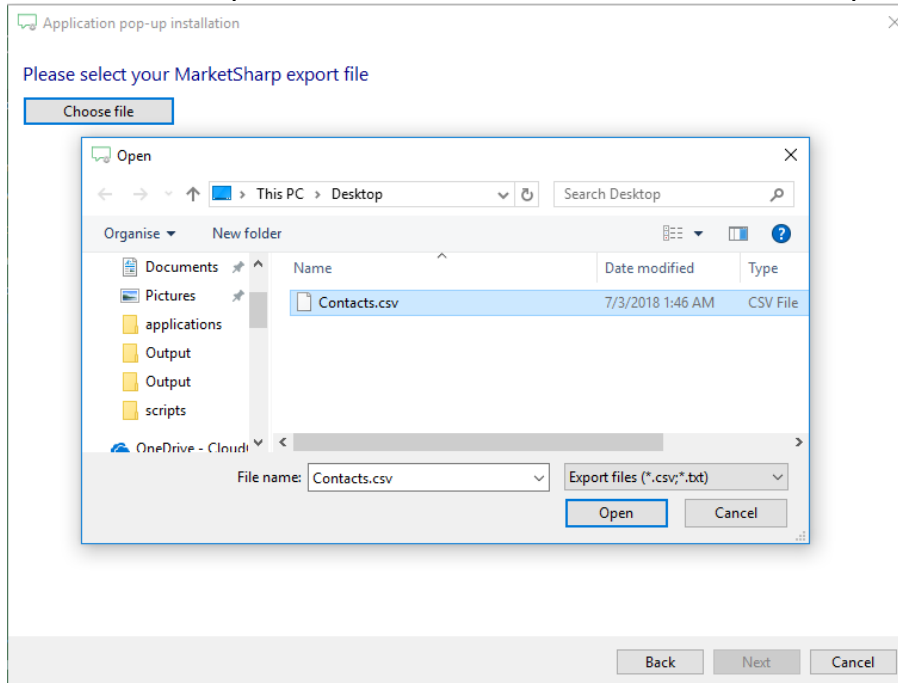
Notes

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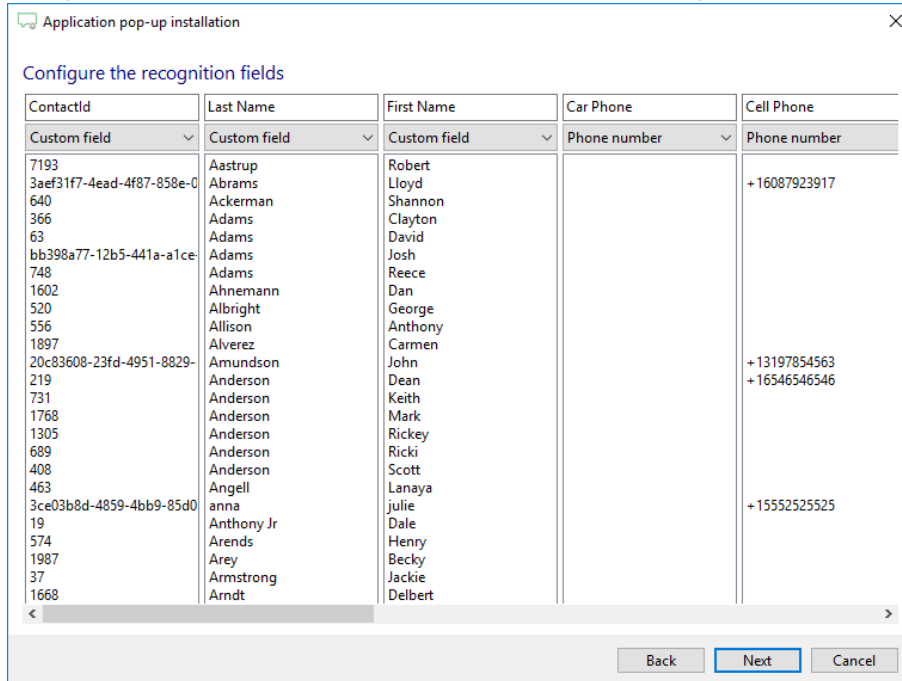
Configuration steps

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.

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'.
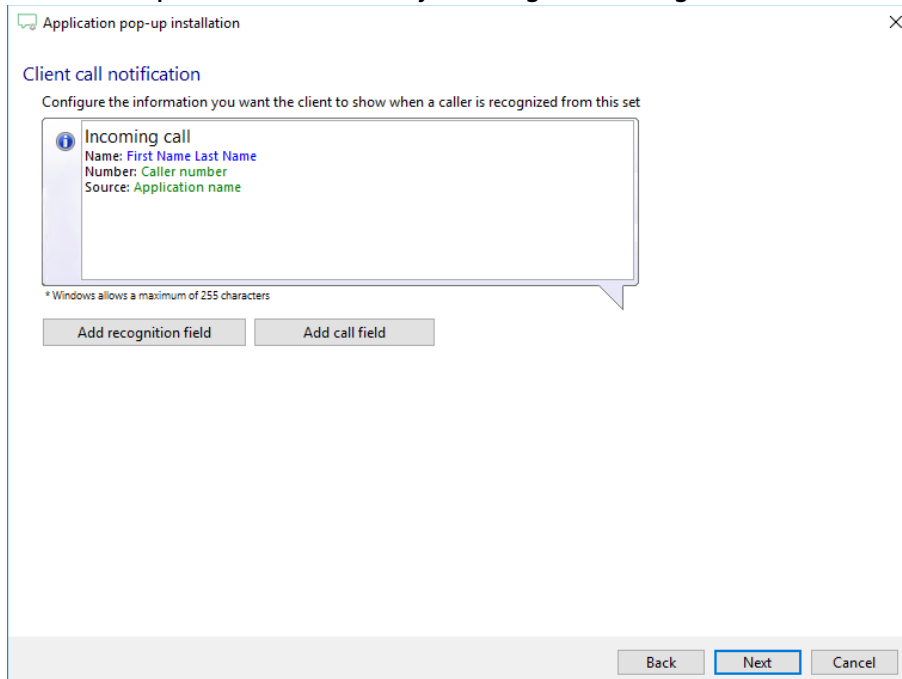

4) Choose which fields to display in the call notification on an incoming call. Any extra field from the export can be added by clicking 'Add recognition field'.

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.

CloudCTI Recognition Configuration Tool   ✕

Enter the webpage you want to open
The MarketSharp URL to show the related client page. Please replace the [SUBDOMAIN] with the valid subdomain of your MarketSharp URL.

Script name   Show Contact

Webpage   https://[SUBDOMAIN].marketsharpm.com/ContactDetail.aspx?contactOid=$(Contactl

Click on a recognition field to add it to the webpage

ContactId
Last Name
First Name
Car Phone
Cell Phone
Home Phone
Home Phone 2
Other Phone
Other Phone 2
Primary Phone
Work Phone
Work Phone 2

Click on a call field to add it to the webpage

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

Restore the default webpage

Test script   Next   Cancel

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

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.

→ 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.

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] [Cancel]