

How to configure caller recognition and screen-pop for:

Microsoft Access

Supported versions: Microsoft Access 2013 and newer

Contact replication method: Access ODBC driver

Screen pop method: COM

Prerequisites

The Recognition update tool replicates data from the Microsoft Access 2013 database via an ODBC driver. A screen pop is performed via COM.

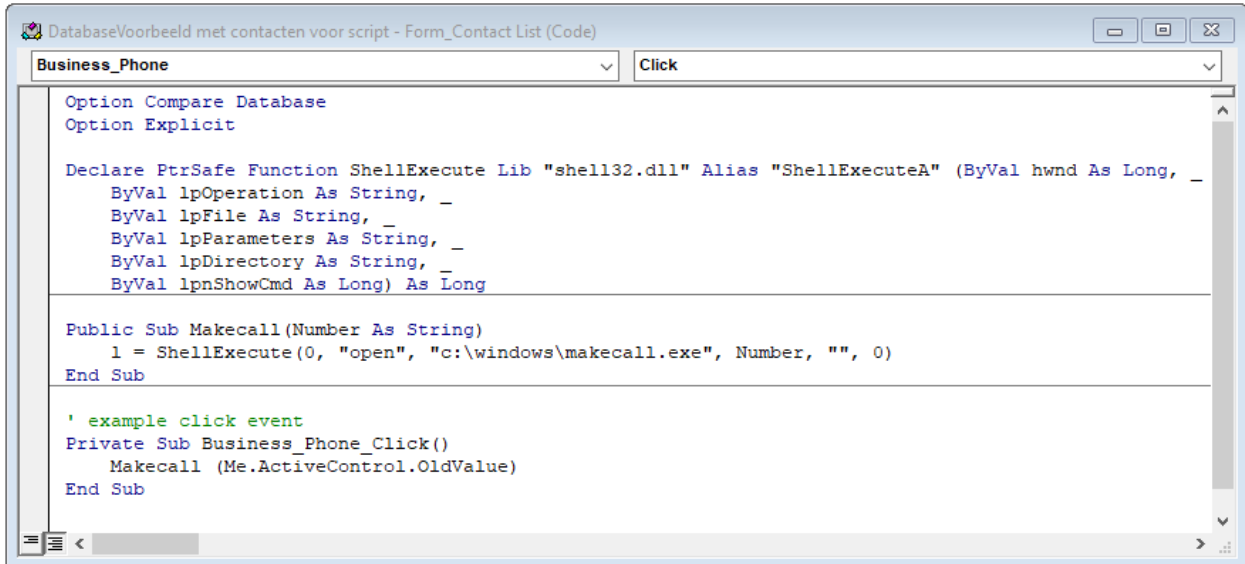
Contact information from Access database can easily be replicated in a few steps using an ADO connection. By default, Windows has ODBC drivers installed supporting older Microsoft Access databases (*.mdb). For all newer version of Microsoft Access database (*.accdb) you will need to install the Microsoft Access Database Engine 2010 Redistributable. Note: please install the 32-bit version! You can download this driver from the Microsoft site following this link:

<https://www.microsoft.com/en-in/download/details.aspx?id=13255>

Notes

Dial from Microsoft Access via DDE is possible using visual basic scripting. You add a call button on your access form and use the next Visual Basic code:

Example source code:



```
Option Compare Database
Option Explicit

Declare PtrSafe Function ShellExecute Lib "shell32.dll" Alias "ShellExecuteA" (ByVal hwnd As Long, _
    ByVal lpOperation As String, _
    ByVal lpFile As String, _
    ByVal lpParameters As String, _
    ByVal lpDirectory As String, _
    ByVal lpnShowCmd As Long) As Long

Public Sub Makecall(Number As String)
    l = ShellExecute(0, "open", "c:\windows\makecall.exe", Number, "", 0)
End Sub

' example click event
Private Sub Business_Phone_Click()
    Makecall (Me.ActiveControl.OldValue)
End Sub
```

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Option Explicit
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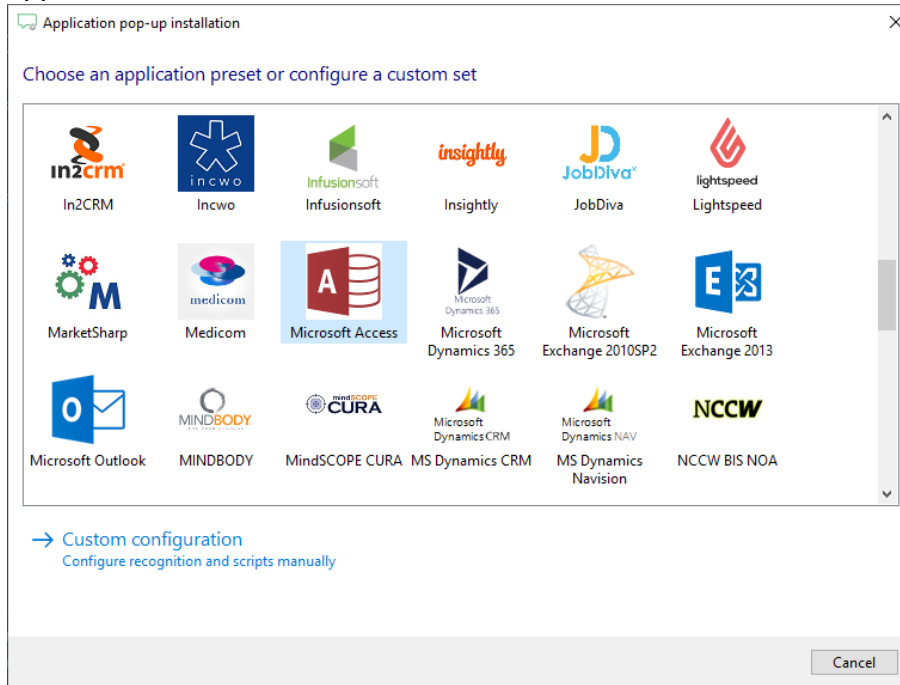
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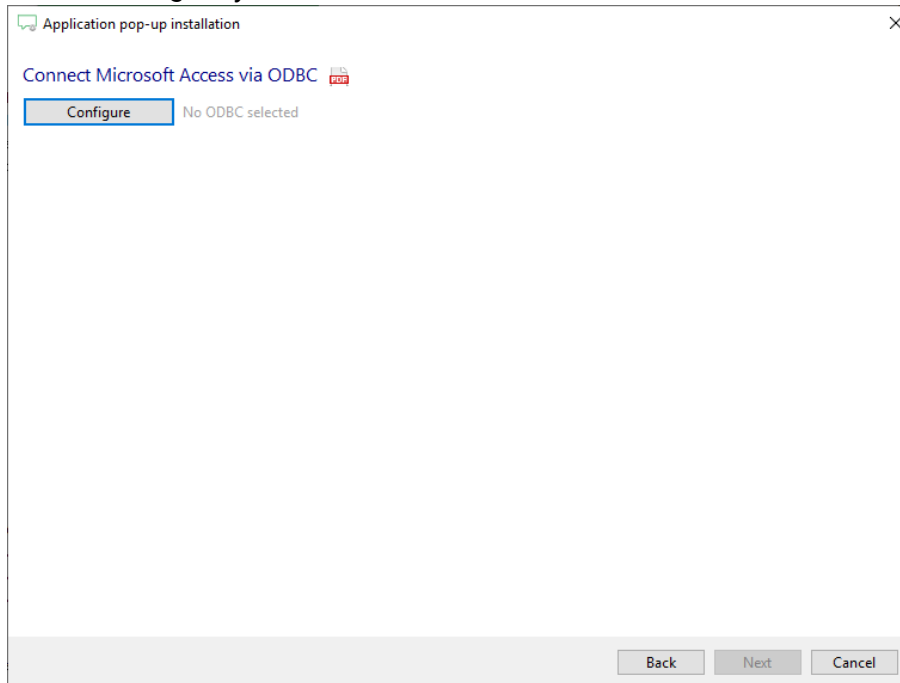
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```

Configuration steps

- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#). From the list of applications, choose 'Microsoft Access', as shown below.



- 2) Press "Configure your ODBC connection."



- 3) You can use the "Microsoft Office XX.X Access Database Engine OLE DB Provider" to connect to the Access database. Provide the data source full file path and user data. Press "OK" continue.

Data Link-eigenschappen

Voorziening Verbinding Geavanceerd Alles

Geef het volgende op om een verbinding met deze gegevens te maken:

1. Geef de gegevensbron en/of locatie van de gegevens op:
Gegevensbron:
Locatie:
2. Geef de gegevens voor aanmelding bij de server op:
 Geïntegreerde Windows NT-beveiliging gebruiken
 Specifieke gebruikersnaam en specifiek wachtwoord gebruiken:
Gebruikersnaam:
Wachtwoord:
 Leeg wachtwoord Opslaan van wachtwoord toestaan
3. Geef de catalogus op die aanvankelijk moet worden gebruikt:

4) Select a table from your database or provide a query

Application pop-up installation

Connect Microsoft Access via ODBC MS PDF

Configure Provider=MSDASQL.1;Persist Security Info=False;Data Source=MS Access;Initial Catalog=C:\Users\BramHeerebout\CRM\Microsoft A

Use an existing table from an existing database

- C:\Users\BramHeerebout\CloudCTI\Keylink B.V. - CloudCTI sharepoint site - CloudCTI\Product Development\CRM\Microsoft A
 - Contacts
 - Settings
 - Contacts Extended

Use an ODBC query

Test query

Back Next Cancel

5) 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

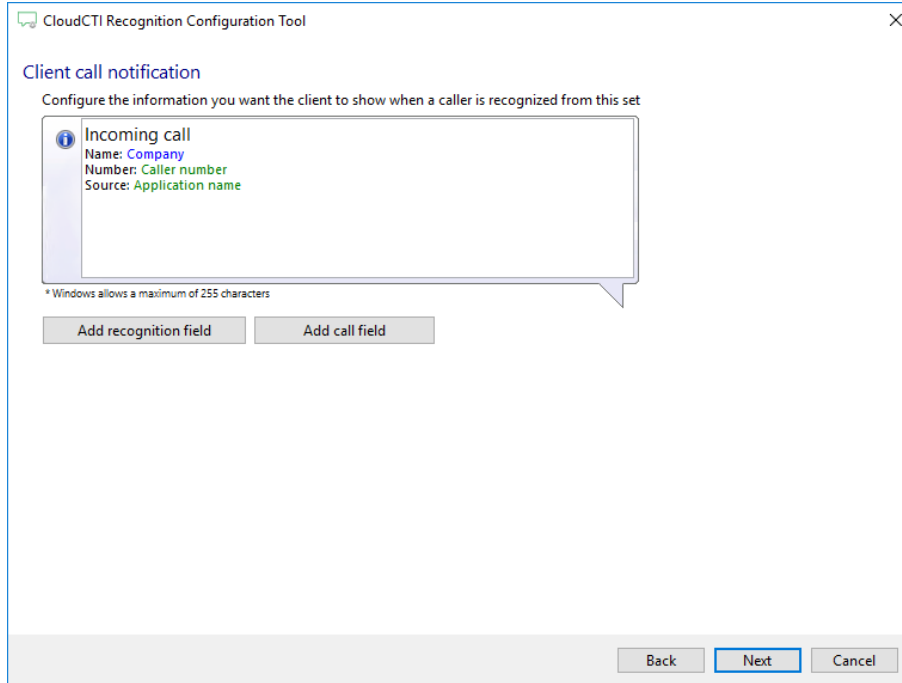
Application pop-up installation

Configure the recognition fields

Address	Job Title	Extension	Business Phone	Home Phone	Mobile
eld	Custom field	Custom field	Custom field	Custom field	Custor
udcti.nl	CEO	666	0123456		
udcti.nl	Directeur	123	041858123		
/linkbv.onmicros	Executuve MVA	249	0648501282		
		237			
		243			+31 65
		555	+3135 6990230		+31 48

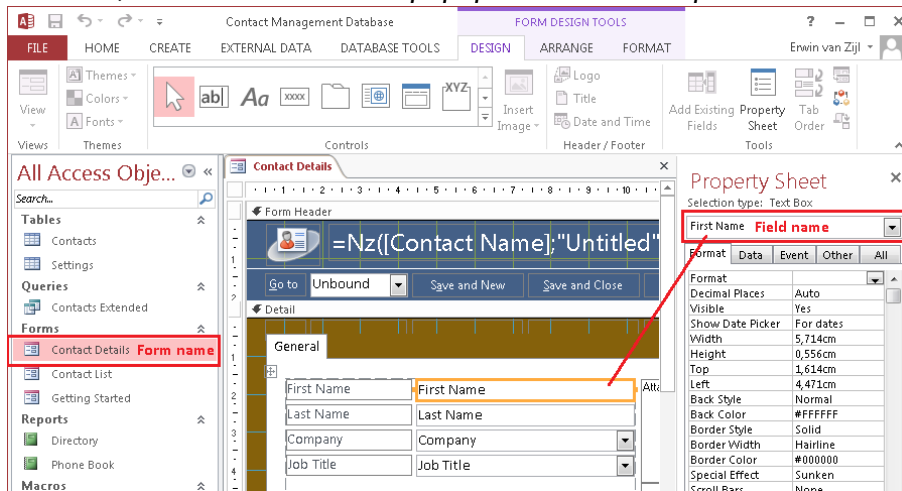
Back Next Cancel

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



7) To enable screen pop for recognized callers, please provide a form name to display, a form name on which a "FindRecord" request will be executed to search for a specific record, based on the Identifier column from your recognition data.

Example screenshot: In the example below the script will search by First Name. However, it is recommended to popup based on a unique customer ID.



Application pop-up installation

Provide the script name and the required parameters

The Window title [AccessCaption] is used to bring the Microsoft Access window to the front. Enter the form [FormName] to open and which control [ControlName] to perform a search for the field value [Identifier]. With 'MatchLength' a number of characters from right side the identifier can be specified to search the record. The search requires an exact match.

Script name: Show Contact

Parameters

AccessCaption: Access

FormName: Contact Details

ControlName: First name

Identifier: \$(First Name)



Test script Next Cancel

8) You can add additional scripts. Please 'Next' to continue.

Application pop-up installation

Which actions do you want to perform?

The Microsoft Access 'Show Contact' script is default and needs to be configured. Optionally, you can add extra scripts to the incoming call notification.

 Show Contact
Show an Microsoft Access form and search a record in a specific control. 

→ Add a new script
Choose from a list of predefined scripts or create a custom script

Back Next Cancel

- 9) Check the configuration summary and click finish to add the recognition from Microsoft Access.

