

How to configure caller recognition and screen-pop for:

# **Microsoft Outlook**

Supported versions: Microft Outlook 2010 and newer Contact replication method: Outlook addressbook Screen pop method: COM/OLE

### Prerequisites

The Recognition Tool uses an Outlook Exporter which connects via the COM/OLE interface.

#### Notes

Dial from Outlook via TAPI is possible with the installed TapiDialer Service Provider.



Dialing Options	×
Settings for speed dialing	
<u>N</u> ame	Phone n <u>u</u> mber
	A <u>d</u> d
Name	Number Delete
Settings for phone number f	formatting and dialing
Automatically add country	y/region code to local phone numbers
Dialing Properties	
Connect using line	
TaniDialas Lina	
	Line Properties
	OK Cancel
New Call	
Number to dial	
<u>C</u> ontact: Boon, C acao	<u>O</u> pen Contact
<u>N</u> umber: 061111	Dialing Properties
Call status: On hook	
Call status: On hook	ialing Ontions



# **Configuration steps**

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Outlook', as shown below.





2) Check the address books to recognize and press 'Next'. In most cases you will use a shared public folder, so anyone can recognize and pop up the contact card.

Name	# Contacts	~
PersonMetadata	20039	
ExternalContacts	0	
Contactpersonen	1163	
Recipient Cache	183	
PeopleCentricConversation Buddies	0	

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

usiness2TelephoneNumb	BusinessTelephoneNumbe	CompanyMainTelephoneN	CompanyName	Email1Address
hone number 🛛 🗸 🗸	Phone number $\sim$	Phone number $\sim$	Custom field $\sim$	Custom field
	+313569!		D )	vitor@dealermarketing testcontact1@contact
	+312012:			
	+ 316270; + 312526;		F 32 G 3. P : R I	
	+ 311836: + 311185!		V S v J, Ji to	
	+316211(	?	* F n *! s'	
			* ic * ic	



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

ent o	call notification					
Config ()	gure the information you v Incoming call Name: FullName Number: Caller number Source: Application name	ant the client to sho	w when a caller is n	ecognized from this :	;et	
* Windo	ows allows a maximum of 255 chara Add recognition field	cters Add call fiel	ld			

5) Check the configuration summary and click finish to add the recognition from Microsoft Outlook

CloudCTI Recognition Configuration Tool	×
Summary	
Application	
Microsoft Outlook	
Recognition	
Recognition from Outlook	
Scripts	
Show Contact:	
Back Finish Cancel	