

How to configure caller recognition and screen-pop for:

NetSuite

Supported versions: NetSuite

Contact replication method: TXT/CSV export

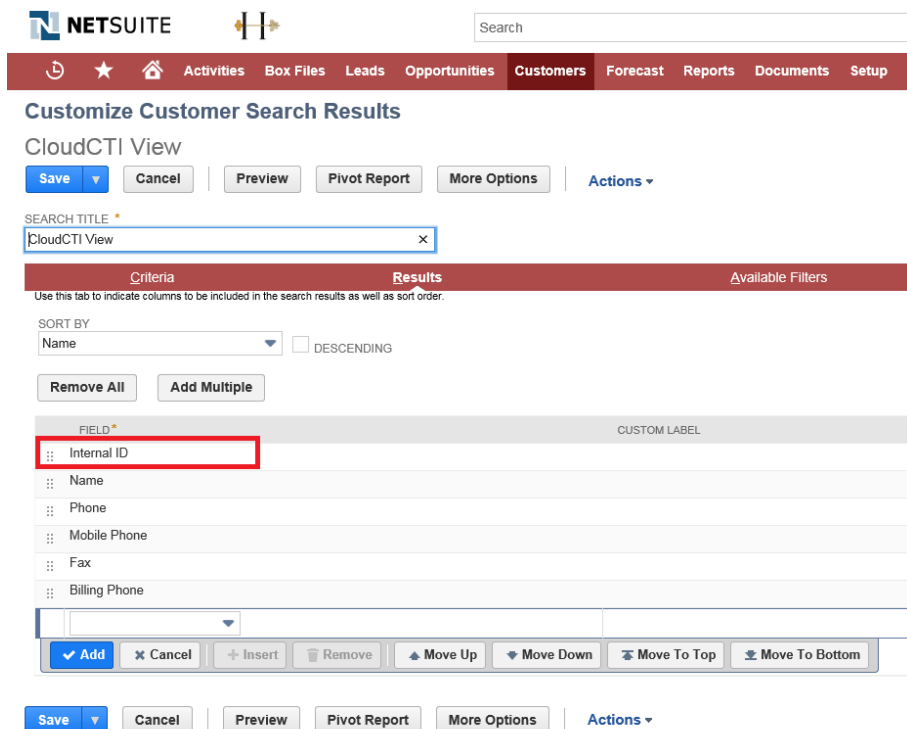
Screen pop method: URL

Prerequisites

To recognize Customers from NetSuite they have to be exported to a TXT/CSV file.

This can be done from the NetSuite application.

Open the customer list view and create a new view containing at least the fields: “Internal ID”, “Name” and the phone numbers you want to recognize.



The screenshot shows the NetSuite interface for customizing search results. The top navigation bar includes the NetSuite logo, a search bar, and a menu with options like Activities, Box Files, Leads, Opportunities, Customers, Forecast, Reports, Documents, Setup, and Settings. The main heading is "Customize Customer Search Results" for the "CloudCTI View". Below this, there are buttons for "Save", "Cancel", "Preview", "Pivot Report", "More Options", and "Actions". A search title field contains "CloudCTI View". The interface is divided into three tabs: "Criteria", "Results", and "Available Filters". The "Criteria" tab is active, showing a list of fields to be included in the search results. The "Internal ID" field is highlighted with a red box. The "Results" tab is also visible, showing the current view configuration. The "Available Filters" tab is empty. At the bottom, there are buttons for "Save", "Cancel", "Preview", "Pivot Report", "More Options", and "Actions".

Save the view and click on “export to CSV” button

NETSUITE Search

Activities Box Files Leads Opportunities Customer

Customers

VIEW CloudCTI Edit View New Customer

Export - CSV

SHOW INACTIVES EDIT

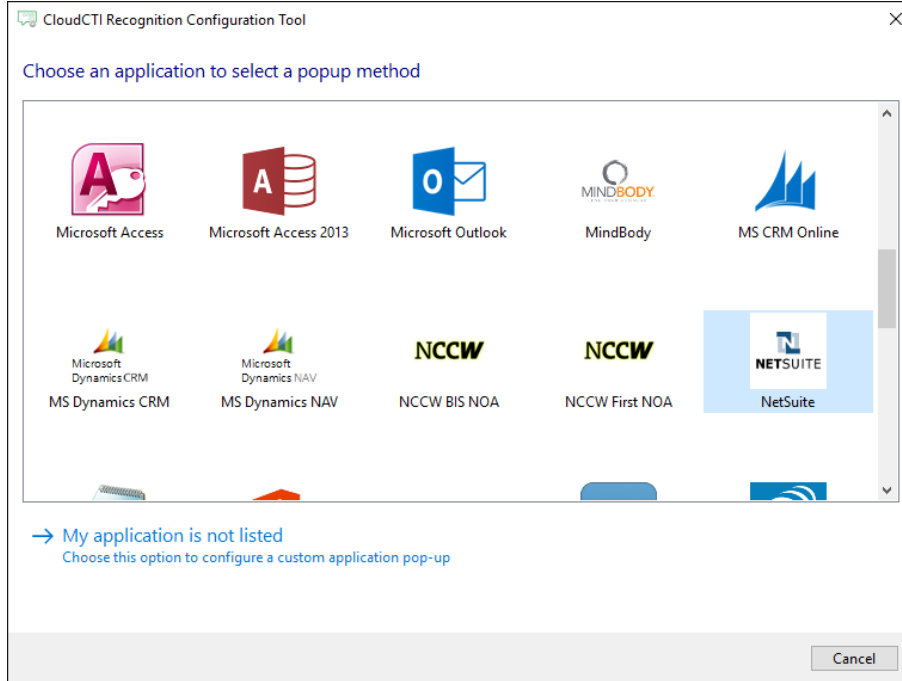
EDIT VIEW	INTERNAL ID	NAME ▲	ADDRESS PHONE	BILLING PHONE
Edit View	1397	3M		
Edit View	1542	Aaron Abbott	(303) 464-4122	(303) 464-4122

Notes

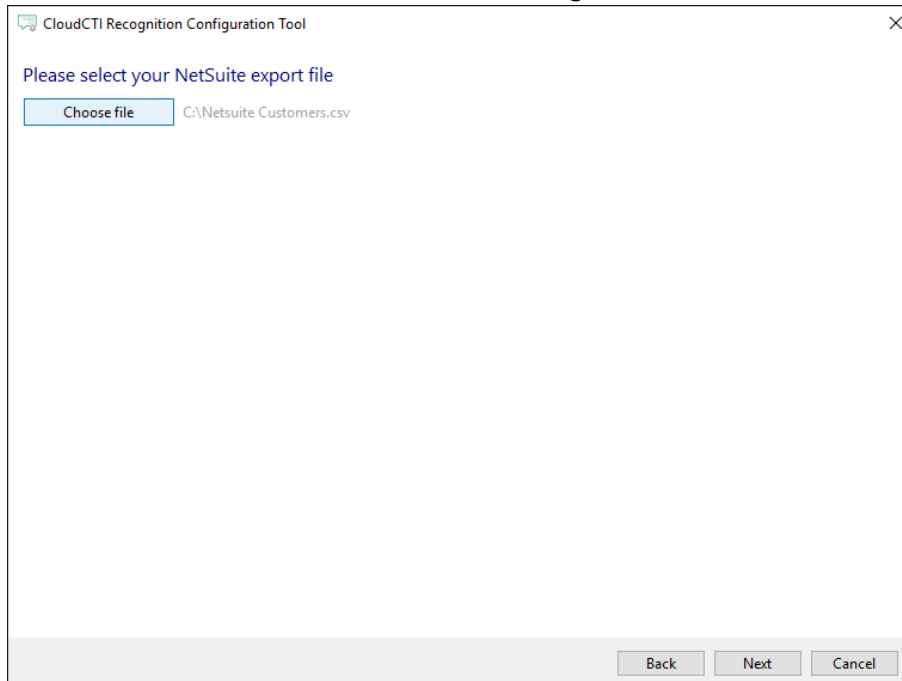
For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

Configuration steps

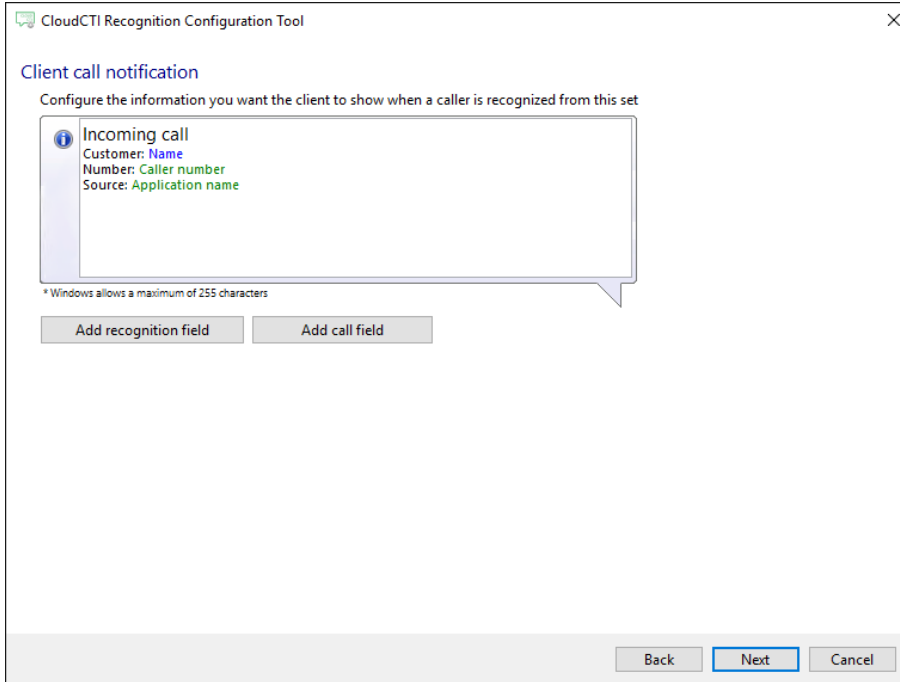
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'NetSuite', as shown below.



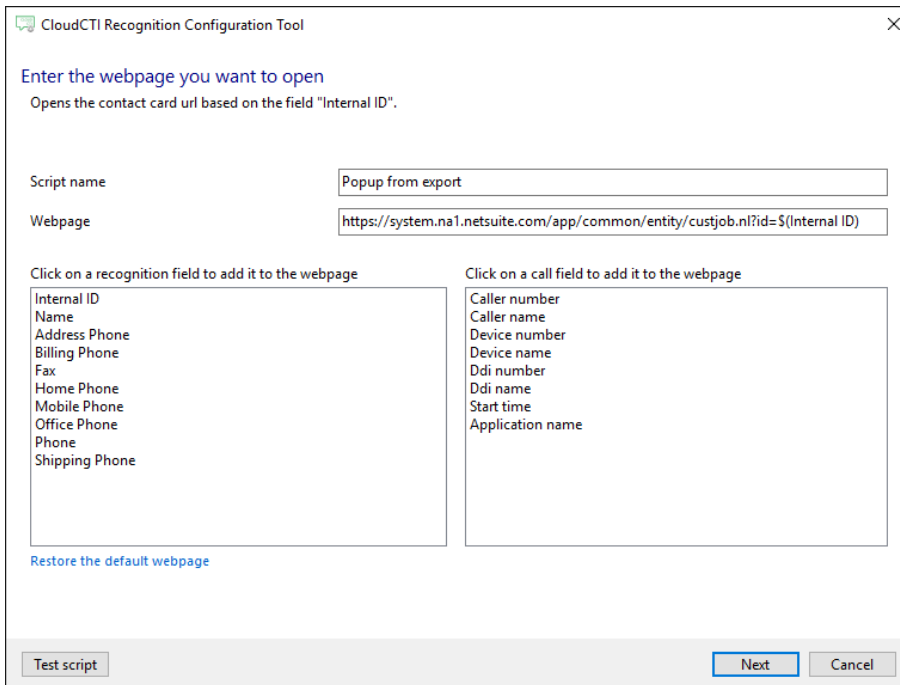
- 2) Select the NetSuite TXT/CSV file containing customer data



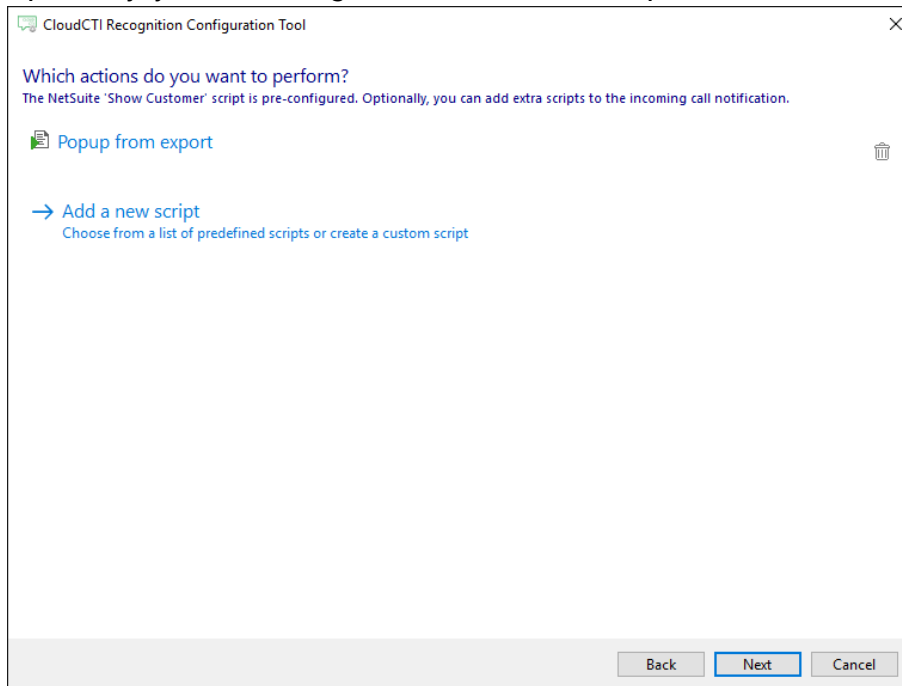
3) Choose which fields to display in the call notification on an incoming call.



4) By default, the popup is configured to open the NetSuite Customers details using the field "Internal ID" from the TXT/CSV export. You may leave this default. Click 'next' to continue.



5) Optionally, you can change or add additional scripts. Click 'next' to continue.



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

