CRM INFO

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.

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SEARCH TITLE *				
CloudCTI View	×			
Criteria Use this tab to indicate columns to be included in the search res	Results		A	vailable Filters
SORT BY Name DE Remove All Add Multiple	SCENDING			
FIELD*		CU	STOM LABEL	
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ii Name				
:: Phone				
II Mobile Phone				
ii Fax				
Billing Phone				
				
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Save the view and click on "export to CSV" button



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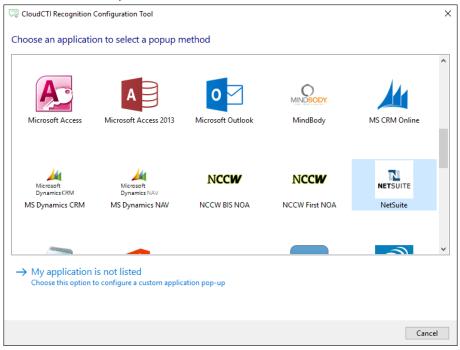
Notes

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 <u>Recognition Configuration Tool</u> (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

🧐 CloudCTI Recogniti	on Configuration Tool			×
Please select you	NetSuite export file			
Choose file	C:\Netsuite Customers.csv			
		Back	Next	Cancel



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

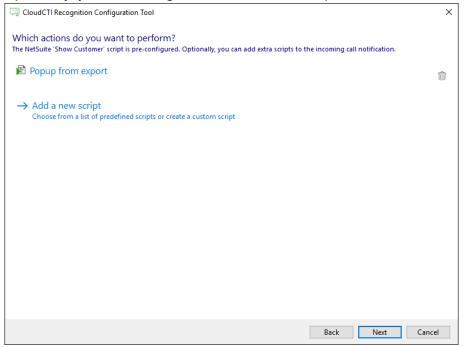
call notification	
gure the information you want the client to show when a caller is recognized from this set Incoming call Customer: Name Number: Caller number Source: Application name	
ws allows a maximum of 255 characters Add recognition field Add call field	

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.

Script name	Popup from	Popup from export	
Nebpage	https://system.na1.netsuite.com/app/common/entity/custjob.nl?id=\$(Internal		
Click on a recognition field to add	l it to the webpage	Click on a call field to add it to the webpage	
Internal ID Name Address Phone Billing Phone Fax Home Phone Mobile Phone Office Phone Phone Shipping Phone		Caller number Caller name Device number Ddi number Ddi name Start time Application name	



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

CloudCTI Recognition Configuration Tool	×
Summary	
Application	
NetSuite	
Recognition	
Recognition from import file C:\Netsuite Customers.csv	
Scripts	
Popup from export: Open webpage https://system.na1.netsuite.com/app/common/entity/custjob.nl?id=\$(Internal ID)	
Back Finish C	Cancel