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.

| NETSUITE 🕂 🕂  | Se                  | arch           |              |                  |
|---|---------------------|----------------|--------------|------------------|
| 🗅 ★ 🖄 Activities Box Files  | Leads Opportunities | Customers Fore | cast Reports | Documents Setu   |
| Customize Customer Search I   | Results             |                |              |                  |
| CloudCTI View   |                     |                |              |                  |
| Save  Cancel Preview  | Pivot Report More O | ptions Action  | S 🔻          |                  |
| SEARCH TITLE *  |                     |                |              |                  |
| CloudCTI View   | ×                   |                |              |                  |
| Criteria<br>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   |                  |
| ii Internal ID  |                     |                |              |                  |
| ii Name   |                     |                |              |                  |
| :: Phone  |                     |                |              |                  |
| II Mobile Phone   |                     |                |              |                  |
| ii Fax  |                     |                |              |                  |
| Billing Phone   |                     |                |              |                  |
| <b></b>   |                     |                |              |                  |
| ✓ Add X Cancel + Insert = F   | Remove A Move Up    | ♥ Move Down    | Move To Top  | ★ Move To Bottom |
| Save V Cancel Preview   | Pivot Report More O | ptions Action  | 5 🔻          |                  |

Save the view and click on "export to CSV" button



| NE.          | <b>T</b> SUITE | <del>≬∐⊳</del>   | Search         |                    |             |
|--------------|----------------|------------------|----------------|--------------------|-------------|
| • ق          | * 🏠            | Activities Box F | iles Leads     | Opportunities      | Customer    |
| Cus          | stomers        |                  |                |                    |             |
| VIEW Clou    | IdCTI          |                  | - Ed           | it View            | New Custome |
| Export - CSV | R8             |                  |                |                    |             |
|              | 1              | SHOW INAC        | TIVES E        | т 💽                |             |
| EDIT   VIEW  | INTERNAL ID    | NAME 🔺           | ADDRE          | SS PHONE BIL       | LING PHONE  |
| Edit   View  | 1397           | 3M               |                |                    |             |
| Edit   View  | 1542           | Aaron Abbott     | <u>(303) 4</u> | <u>64-4122</u> (30 | 3) 464-4122 |

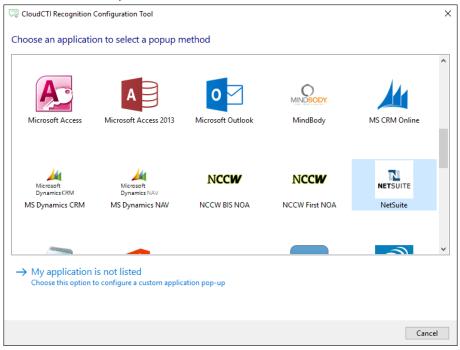
### Notes

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 <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 |      |      |        |
|                      |                           |      |      |        |
|                      |                           |      |      |        |
|                      |                           |      |      |        |
|                      |                           |      |      |        |
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|                      |                           |      |      |        |
|                      |                           |      |      |        |
|                      |                           | Back | Next | Cancel |



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

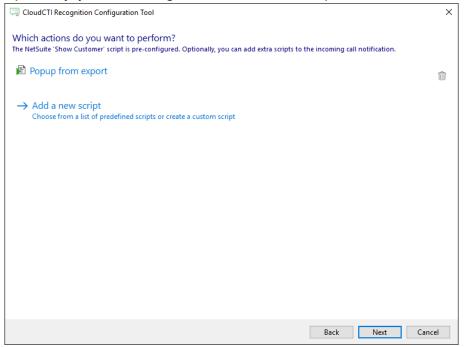
| call notification  |  |
|--|--|
| gure the information you want the client to show when a caller is recognized from this set Incoming call Customer: Name Number: Caller number Source: Application name |  |
| ws allows a maximum of 255 characters Add recognition field Add call field   |  |
|  |  |
|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

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<br>Name<br>Address Phone<br>Billing Phone<br>Fax<br>Home Phone<br>Mobile Phone<br>Office Phone<br>Phone<br>Shipping Phone |   | Caller number<br>Caller name<br>Device number<br>Ddi number<br>Ddi name<br>Start time<br>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 |
|   |        |