How to configure caller recognition and screen-pop for:

OrderDirect

Supported versions: OrderDirect Contact replication method: None Screen pop method: TAPI

Prerequisites

To use the TAPI integration OrderDirect requires the purchase of the module 'Koppeling met telefooncentrale', see: <u>https://www.order-direct.nl/producten/modules/koppeling-met-telefooncentrale/_340____NL</u>. To configure the click-to-dial feature and incoming call notification, please select the 'TapiDialer Line' as your TAPI device.

Notes

Configuration steps

1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose 'OrderDirect', as shown below.

CURA	Microsoft Dynamics CRM	Microsoft Dynamics NAV	NCCW	NCCW		
indSCOPE CURA	MS Dynamics CRM	MS Dynamics Navision	NCCW BIS NOA	NCCW First NOA	NetSuite	
	ORDERDIRECT.	pv	perfect view	pipedrive		
Office365	OrderDirect	PerfectView 9	PerfectView CRM Online	Pipedrive	PipelineDeals	
PRO	Real works	\bigcirc	RPM	sage CRM	salesforce	
romedico ASP	Realworks	Rosa	RPM Telco	Sage CRM	Salesforce	



2) No configuration is required here. Click 'Next' to continue.

Application pop-up installation		×
OrderDirect CRM 👼		
You do not need to configure a recognition data source. The script only requires the caller's number.		
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3) The OrderDirect 'Show Call' script uses TAPI to signal the incoming call and has no further parameters. Optionally, you can choose not to always execute the script on an incoming call by deselecting the checkbox 'Automatically execute this script'. The script is triggered manually by clicking the 'Show Call' button on the notification.

🧔 CloudCTI Recognition Co	nfiguration Tool	×
Provide the script nar	ne and the required parameters	
Script page	Show Coll	
Script name	Show Call	
Parameters		
This script has no paramete	2	
Automatically execute	this script	
Test script		Next Cancel

4) Optionally, additional scripts may be configured for the incoming call notification. Otherwise, click 'Next' to continue.

C Application pop-up installation	×
Which actions do you want to perform? The 'Show Call' script is pre-configured for OrderDirect. Optionally, you can add extra scripts to the incoming call notification.	
Show Call Send the caller number to OrderDirect via the TAPI driver.	Ŵ
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next Car	ncel



5) Check the configuration summary and click finish to add the integration with OrderDirect.

Application pop-up installation	×
Summary	
Application	
OrderDirect	
Recognition	
No recognition has been configured	
Scripts	
Show Call:	
Back	Cancel