

How to configure caller recognition and screen-pop for:

Realworks

Contact replication method: None, or **optionally** export to excel Screen pop method: Proprietary API or URL / Keystroke emulation

Prerequisites

Realworks can be integrated using two distinctly different methods:

Method A. Connect to the Realworks Telephony API.

Access must be purchased separately from Realworks. You will receive a 'ServerId', 'OwnerId', and 'Authorization Key'. These parameters are the only settings required to enable the integration and no manual export is required. Another advantage of this method is that all calls are registered in Realworks.

This method has two sub-options:

- Use the API fully cloud based: with this option, all calls are processed server side and passed on from our event service to Realworks directly. This needs to be activated in the webclient, per user, to enable the cloud-based subscriptions. Once enabled, it will always remain active, even if the user is away from their computer and not signed in anywhere.
- Use the API client side: with this option, the call events will be sent to Realworks from the network of the user and the client must be running to pass the information to Realworks via the API.

When using the Telephony API, users should have these settings configured in 'Instellingen/Persoonlijke/Instelingen telefonie'

	Type telefonie koppeling	IP-PBX	\$		
	Callregistratie automatisch openen bij	alle gesprekken	٥		
	De hoofdcategorie om standaard te selecteren	Alle	٥		
	Automatisch Inloggen op CRM Swyx Koppeling bij aanmelden				
	Focus het CRM scherm automatisch wanneer een call wordt gesignaleerd				
	De afdeling waar naar wordt doorverbonden ook weergeven in de wachtrij				
	Tel. intern	50			

According to the Realworks manual, when you change these settings you must save them, sign out and sign first. With the API, Realworks matches the phone calls to the users with the field 'Tel. Intern'. This needs to match exactly once. Thus, all the phone extensions of the should be registered uniquely to the <u>Realworks users</u>. If two users are registered with the same device, Realworks returns an error. The users can all be listed conveniently in one view by going to 'Relatiebeheer/Medewerkers' and then clicking the orange search button.



Method B. Export all relations from Realworks

Export all relations with their phone numbers from Realworks and synchronize these so they can be matched on an incoming call. Recognized callers can also be looked up automatically using their unique Relation Id. The advantage of this method is that it does not involve an extra cost with Realworks.

All relations can be exported to excel files, but it has to be repeated for each type of relation: 'person', 'company', 'contact' and 'employee' ('particulieren', 'bedrijven', contactpersonen en 'medewerkers' in Dutch).

To export all 'persons', go to 'Relatiebeheer/particulieren', then increase the maximum search results to include all persons in your database and click 'search' with empty search criteria, as shown in the screenshot below:

R Realworks X				
← → C 🏠 🔒 Secure http:	s://crm.realworks.nl			¶☆ 🧌 💷 :
Realworks	=	Contact		🔎 🗴 Sanne Klompenhouwer 🗸
\star Favorieten	Particulieren			8 X D 0
倄 Wonen	Filters			X Excel Overzicht
📽 Relatiebeheer 🗸 🗸	Accountmanager		Q Vestiging	Overzicht particulieren
Particulieren	Invoerdatum 💠 van 🎬	Invoerdatum t/m	m Type relat	e 🖤
Bedrijven			Kenmerk	÷
🚯 Contactpersonen	Inhoud \$			٩
8 Medewerkers	Relatiecode Relatie	Huisadres	Postadres	Contact
ta Relatieselecties				
🖹 Agenda / Taken				+
Correspondentie				\$
Co Uren / Projecten				•
🐨 Webdiensten				=
Servicedesk				
📞 Telefonie				
			Max. resultaten 50	000 Q 100
	4			► resultaten

The results will show all contacts. To export the results, press the printer icon on the top right and choose Excel. Repeat these steps for all relation categories.

Contact information from Excel files can easily be replicated using an ADO (ActiveX Data Objects) connection. By default, Windows has drivers installed supporting Excel 5.0 to Excel 2003 files (*.xls). If these drivers are not installed, please install the Microsoft Access Database Engine 2010 Redistributable. This also supports the newer version of Excel files (*.xlsx). Note: please install the 32 bit version! You can download this driver from the Microsoft site following this link: http://www.microsoft.com/en-us/download/details.aspx?id=13255.



Notes

Telephone numbers in Realworks are always hyperlinked with the 'callto://' prefix. These are clickable on the workstation without any further configuration.

Configuraton steps

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

Choose an appl	lication preset or	configure a cu	stom set		Search	<u> </u>
Outreach	$\langle \! \langle \! \rangle \! \rangle$	oxolutions	pv	perfect View	pipedrive	
Outreach	OutSmart	Oxolutions	PerfectView 9	PerfectView CRM Online	Pipedrive	
PipelineDeals	PRO		(i) quickbooks	RADAR software	MReal works	
PipelineDeals	Promedico ASP	QuickBase	QuickBooks	RADAR	Realworks	
		\bigcirc		sage CRM	salesforce	
Redtail	ROBIN	Rosa	RPM Telco	Sage CRM	Salesforce	
			اھ.			*
→ Custom co Configure rec	onfiguration ognition and scripts n	nanually				
						Cancel



2) For method A, using the telephony API from either the cloud or from the client, choose one of the first two options. For method B, using export files, choose one of the last options.

G Application pop-up installation			×
Choose how you want to link to this application's recognition 📠			
→ Cloud -> Realworks telephony API Configure the integration sending telephony events to Realworks from the cloud.			
→ Client -> Realworks telephony API Configure the integration sending telephony events to Realworks from the client.			
→ Export -> Companies Use the Realworks Company export file			
→ Export -> Contacts Use the Realworks Contacts export file			
→ Export -> Employees Use the Realworks Employees export file			
→ Export -> Persons Use the Realworks Persons export file			
	Back	Next	Cancel

3) A) specify the parameter values you received from Realworks and continue directly to step 7

🧔 Application pop-up inst	allation		×
Provide the script nai Provide the three relevant	me and the required parameters values below. These are provided by BaseNet with the telephony module.		
Script name	Show Contact		
Parameters			
Owner			
Serverld			
AuthorizationKey			
			_
Test script		Next Cancel	



B) Select the excel file containing the exported information for this relation type and the correct sheet (always 'sjabloon', or 'blad1' for the employees export).

CloudCTI Recognition Configuration Tool	×
Choose the excel file containing the contact information 📷	
C:\Data\Export XLS-28032017_1021.xls	
Choose the sheet containing the recognition info	
sjabloon 🗸	
Blad3	
sjabloon Sners	
D-ale Mark	Cancel
Back	Cancel

4) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.

🧔 CloudCTI Re	cognition Configuration Too	1		-	×
Configure t	ne recognition fields				
	Kenmerk 8	Kenmerk 9	Kenmerk 10	Relatie code	<u>A</u>
d v	Custom field \sim	Custom field \sim	Custom field \sim	Custom field \sim	•
				101994 101346 101847 100098 100698 101931 101813 100584 100697 100567 101201 101297 101915 101686 100832 101436 101436 101443 100443 100443 100443 100483 100405	
<					>
			В	ack Next C	Cancel



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

Application p	oop-up installation	×
Client call no	otification	
Configure the	e information you want the client to show when a caller is recognized from this set	
•	Incoming call	
~	Contact name: Name Organization: Organization Number: a flat for the former Source: and the former	
	Open contact	
* Windows allows	a maximum of 4 lines, and a maximum of 128 characters	
	Add field	
	Back Next Cancel	

6) The 'Show Contact' script is preconfigured. You can add extra scripts or replace the 'Show Contact' script.

Supplication pop-up installation	×
Which actions do you want to perform? The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.	
Show Contact Open the automatically generated URL to the caller's CRM page.	Î
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back	Cancel



7) Check the configuration summary and click 'Finish' to add the integration with the application.

