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’

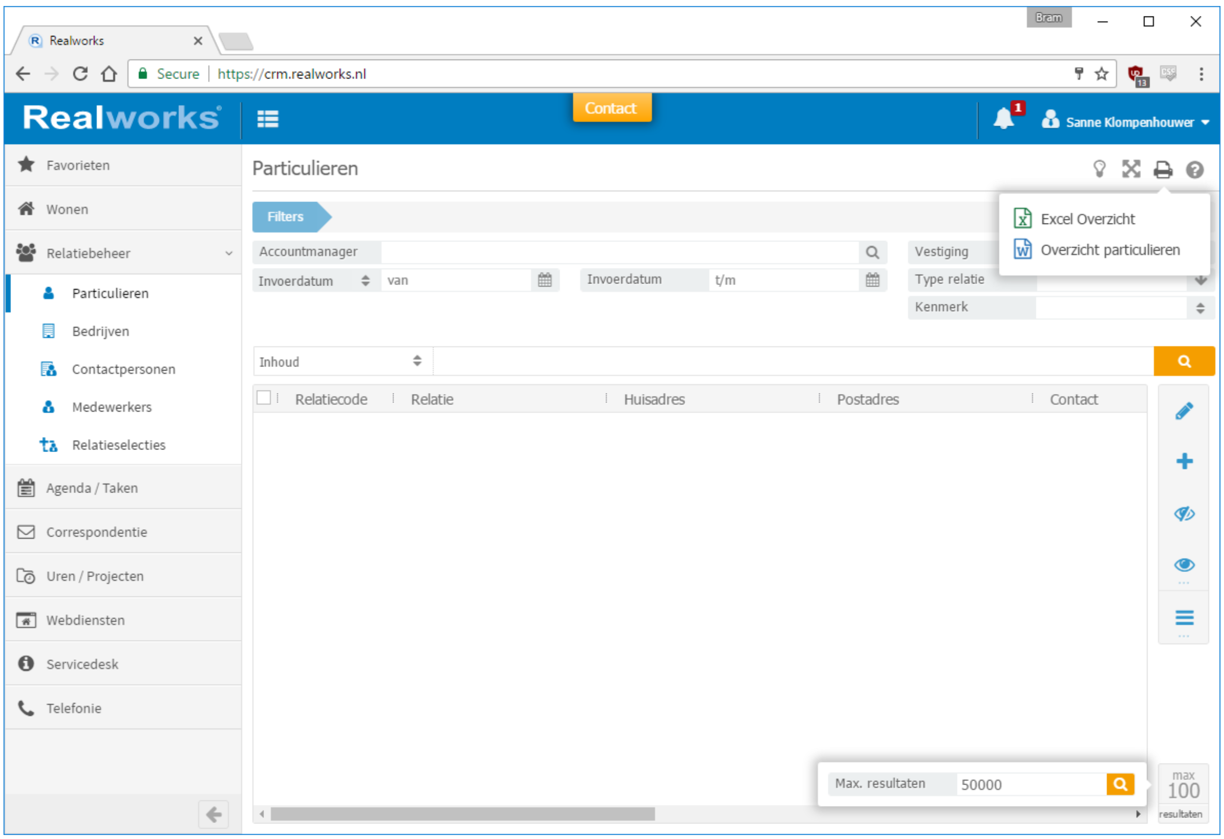
According to the Realworks manual, when you change these settings you must save them, sign out and sign first. With the API, Realworks matches the phone calls to the users with the field ‘Tel. Intern‘. This needs to match exactly once. Thus, <u>all the phone extensions of the should be registered uniquely to the 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:



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.

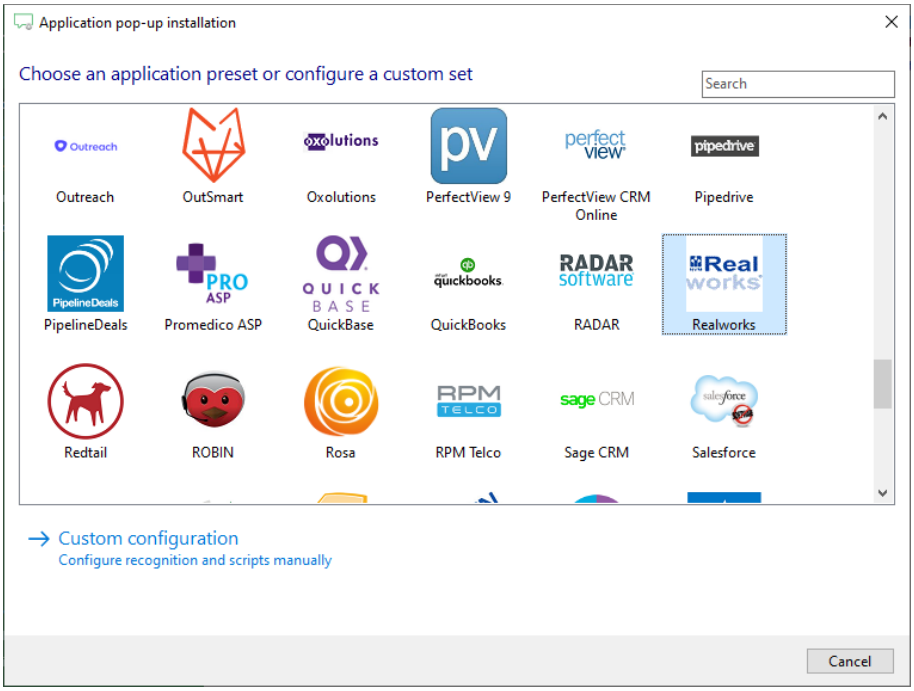
Contact information from Excel files can easily be replicated using an ADO (ActiveX Data Objects) connection. By default, Windows has drivers installed supporting Excel 5.0 to Excel 2003 files (*.xls). If these drivers are not installed, please install the Microsoft Access Database Engine 2010 Redistributable. 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

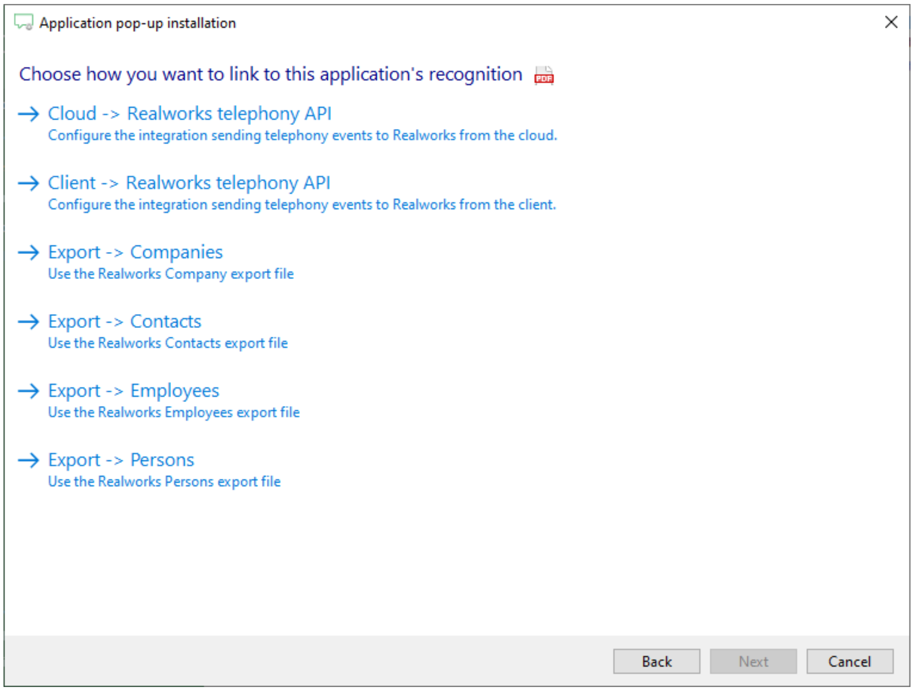
Telephone numbers in Realworks are always hyperlinked with the 'callto://' prefix. These are clickable on the workstation without any further configuration.

Configuraton steps

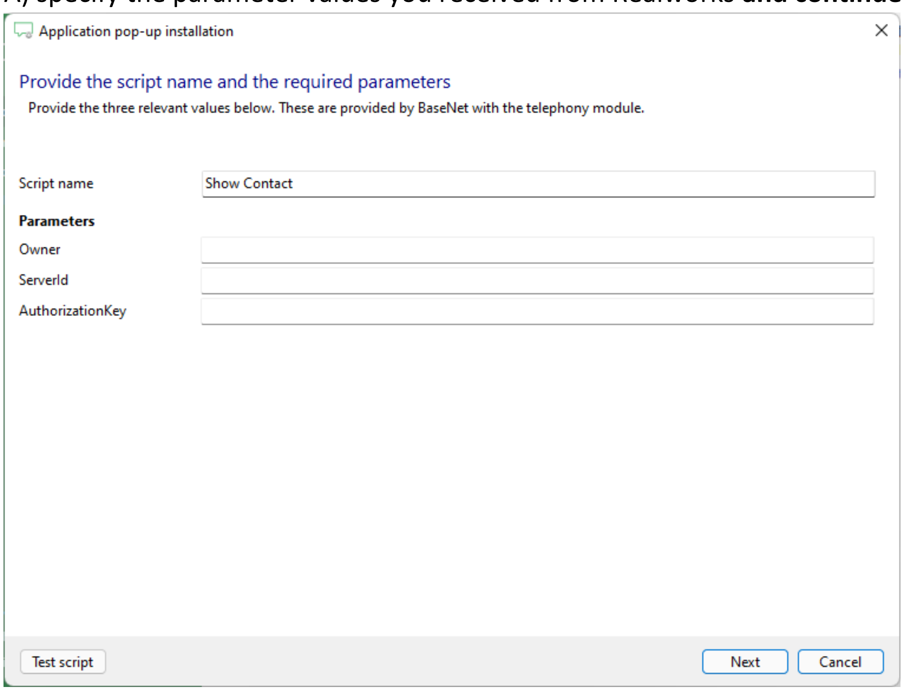
1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Realworks, as shown below.



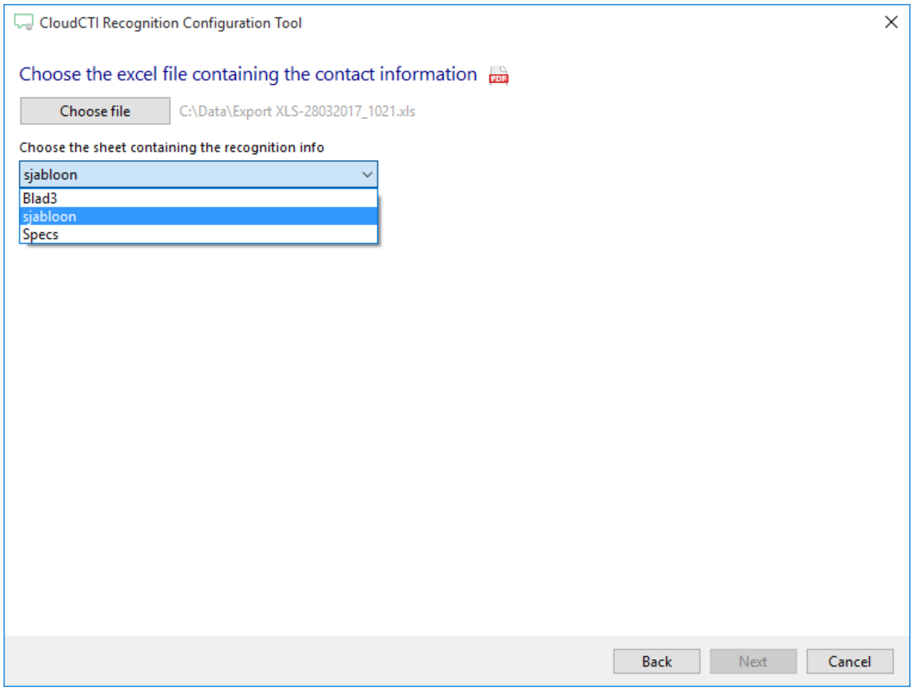
2) For method A, using the telephony API from either the cloud or from the client, choose one of the first two options. For method B, using export files, choose one of the last options.



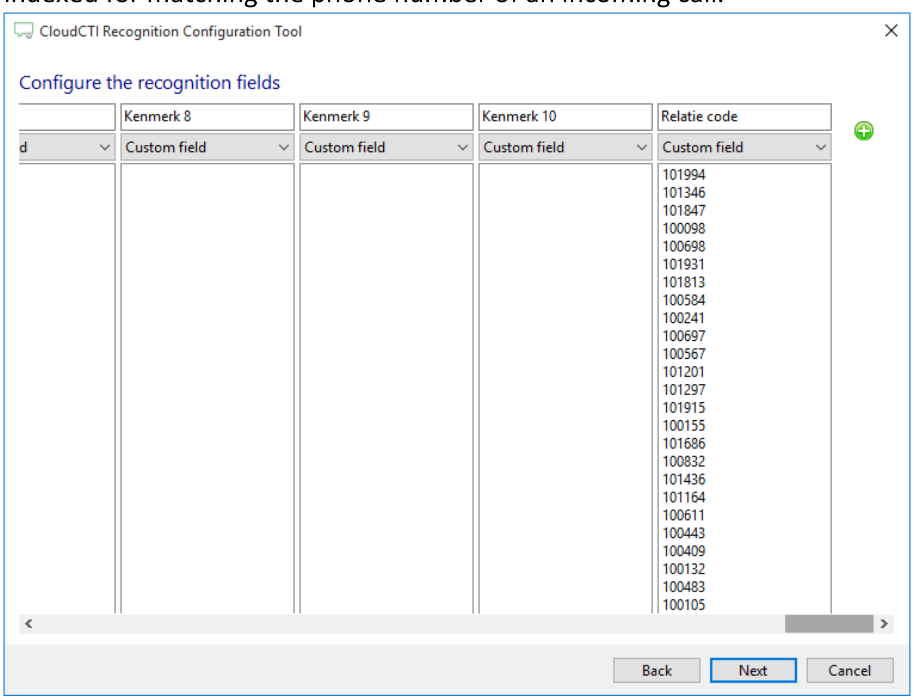
3) A) specify the parameter values you received from Realworks **and continue directly to step 7**



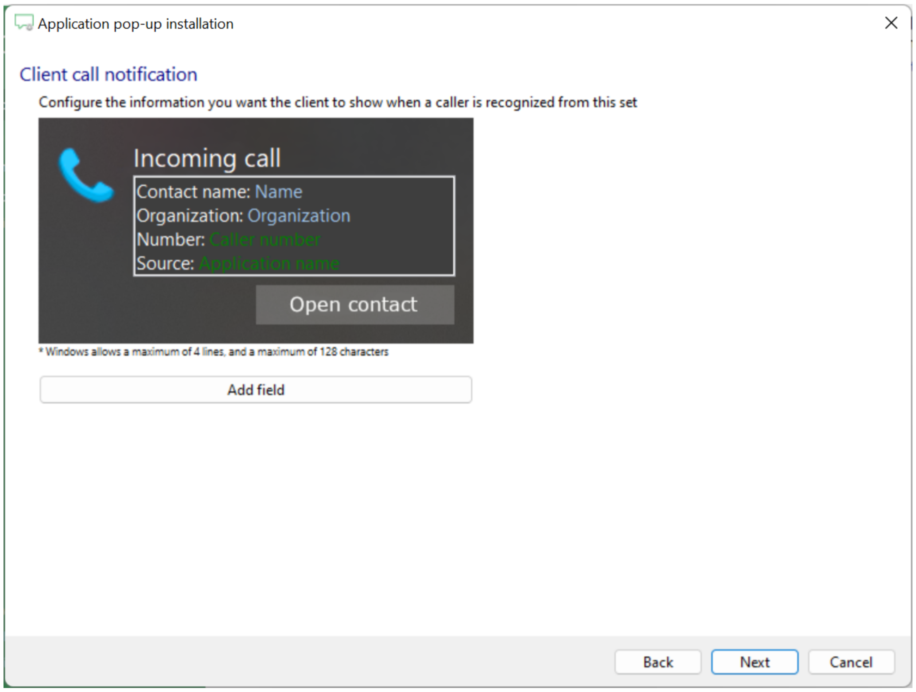
B) Select the excel file containing the exported information for this relation type and the correct sheet (always ‘sjabloon’, or ‘blad1’ for the employees export).



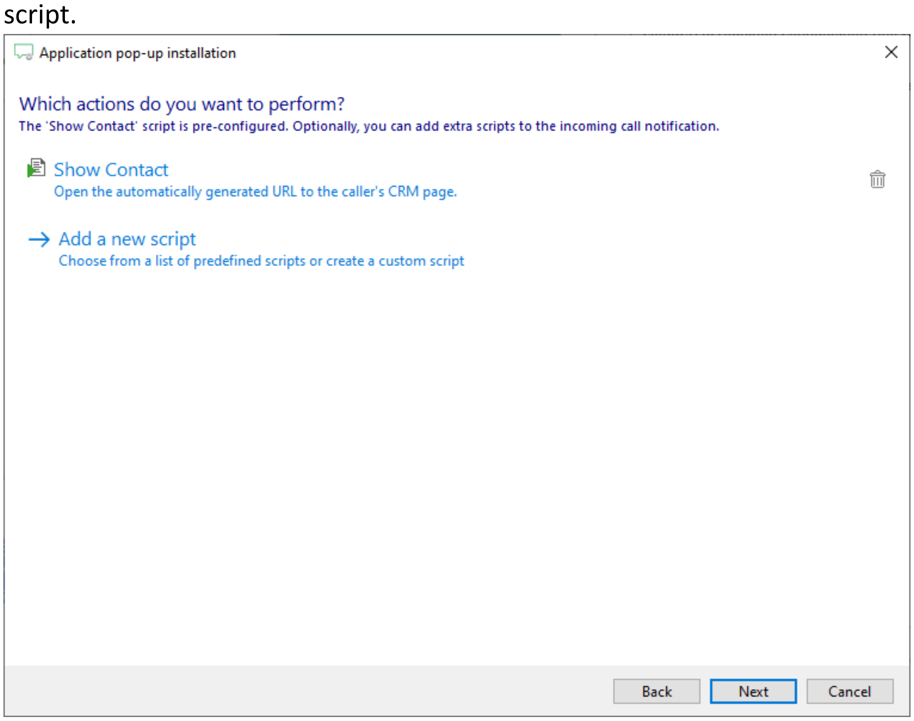
4) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.



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



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



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