

How to configure caller recognition and screen-pop for:

SuperOffice Online

Supported versions: SuperOffice Online

Contact replication method: Text export

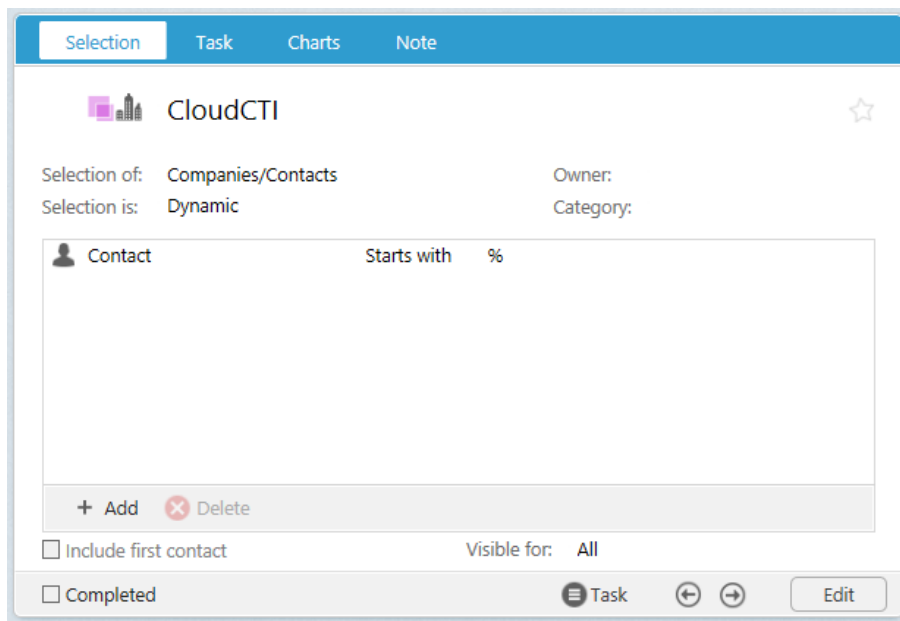
Screen pop method: SuperOffice Web Tools

Prerequisites

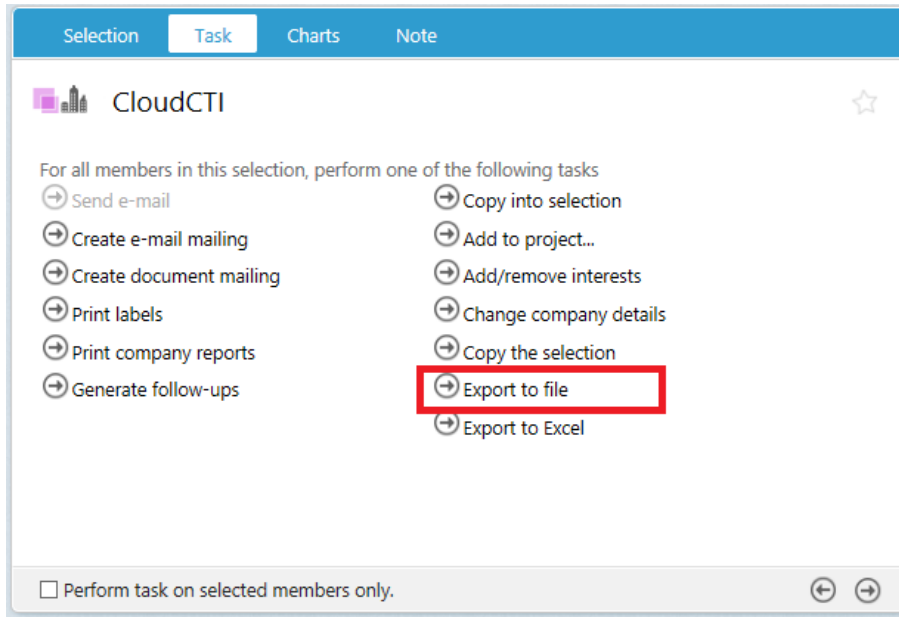
The SuperOffice Online integration requires a text export for caller recognition. To pop-up company details, SuperOffice Web Tools software needs to be installed on the user's desktop.

Create a CSV export using SuperOffice Online import/export

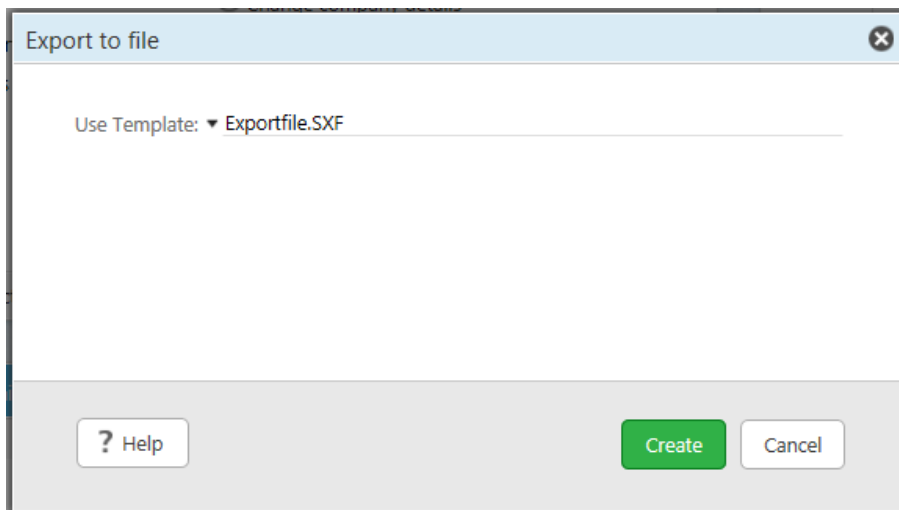
In SuperOffice Online, create a new selection of Companies/Contacts for example called "CloudCTI Export", add an empty filter to display all contacts.



Next, via tab "Task" you can export the data to a txt file



The layout of the export is determined by an SFX file

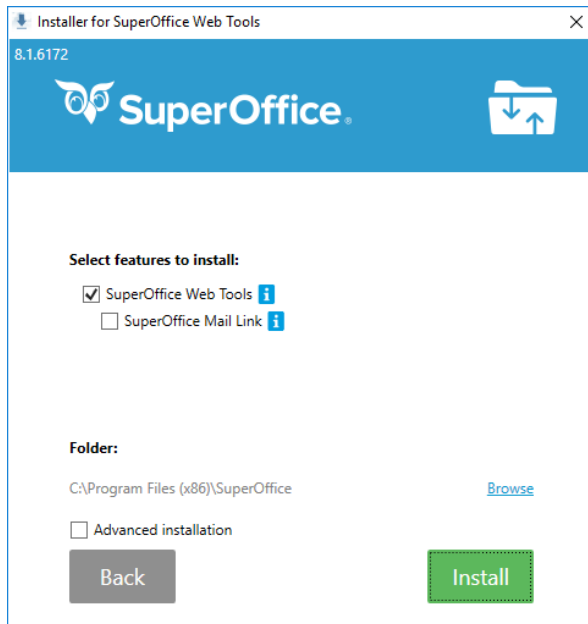


By default the Exportfile.SXF layout produces a tab-separated text file. If you use another (custom) layout, make sure the export file contains at least the following fields:
ContactID, Company, Firstname, Lastname, Phone, PersonID, Private phone ,Mobile phone

The Recognition service is not authorized to access the file on other computers. Therefore it is required to store the text file at a fixed location on your PC. If you have an updated text file, you can override the existing text file on this file location.

Install SuperOffice Web Tools

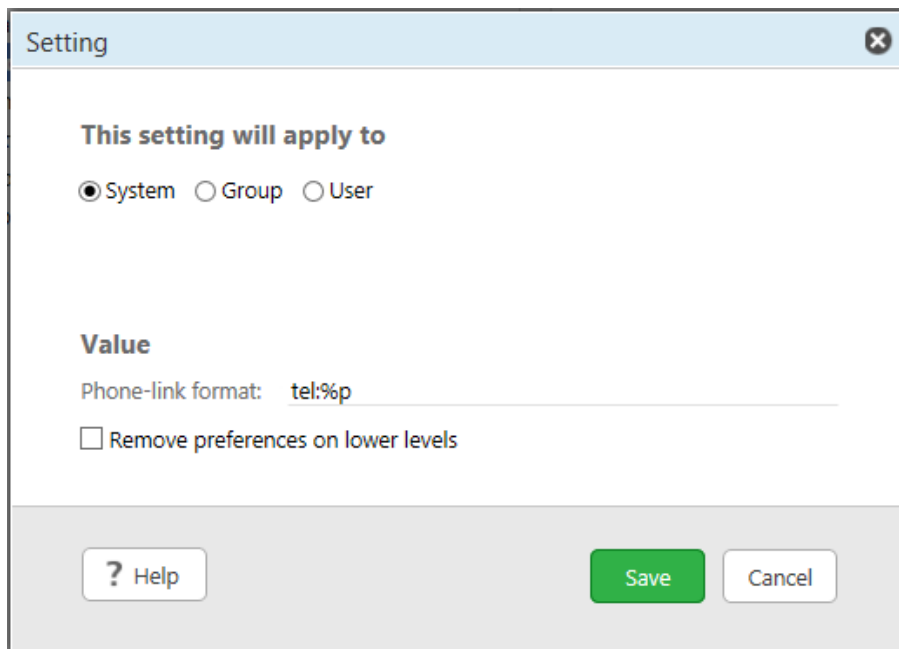
On first logon to SuperOffice Online, a welcome dialog is displayed to the user. If SuperOffice Web Tools is not yet installed, the startup wizard will prompt to install it.



Notes

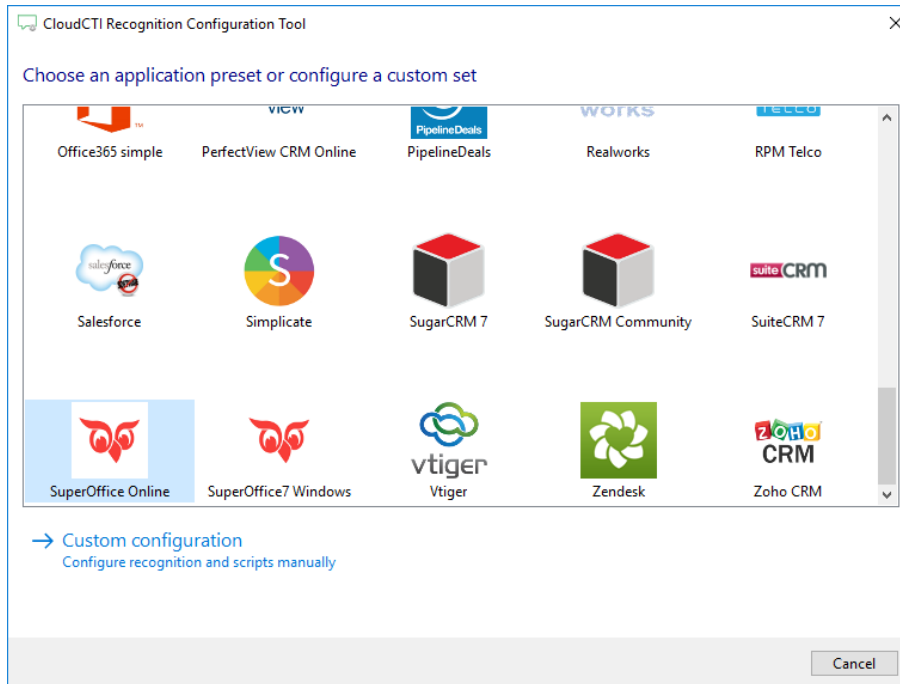
Dial from SuperOffice Online by selecting a phone number and press the hotkey (PAUSE)

The administrator can enable click to dial in SuperOffice via "Settings and maintenance > Preferences" type "phone-link" and set the template string to [tel:%p](#)



Configuration steps

- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'SuperOffice Online', as shown below.



- 2) Select the SuperOffice Online export text file (see Prerequisites for more information).

The screenshot shows a window titled "CloudCTI Recognition Configuration Tool". Inside, it says "Please select your SuperOffice Online export file". There is a "Choose file" button and a text field containing "C:\Exportfile.txt". Below this, it says "File read successfully". At the bottom right, there are three buttons: "Back", "Next", and "Cancel".

- 3) The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue

The screenshot shows the same window, but now it is titled "Configure the recognition fields". It displays a table with six columns: "Phone", "Fax", "WWW", "Our contact", and "PersonID". Each column has a dropdown menu. The "Phone" dropdown is set to "Phone number" and shows a list of phone numbers. The "Fax" dropdown is set to "Custom field" and shows a list of fax numbers. The "WWW" dropdown is set to "Custom field" and shows a list of website URLs. The "Our contact" dropdown is set to "Custom field" and is empty. The "PersonID" dropdown is set to "Custom field" and shows a list of person IDs. At the bottom right, there are three buttons: "Back", "Next", and "Cancel".

	Phone	Fax	WWW	Our contact	PersonID
	Phone number	Custom field	Custom field	Custom field	Custom field
	+31736919191	+31 736919196	www.superoffice.nl		1
	+31736919191	+31 736919196	www.superoffice.nl		2
	+31736919191	+31 736919196	www.superoffice.nl		3
	+31736919192	+31 736919196	www.superoffice.nl		4
	+31356990241				5

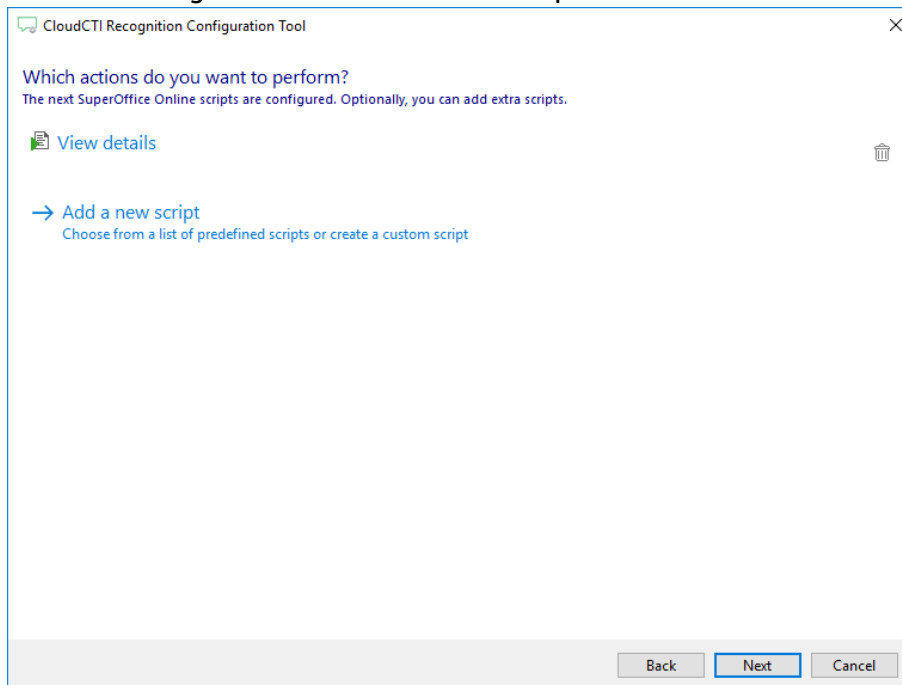
4) Choose which fields to display in the call notification on an incoming call.

The screenshot shows the 'Client call notification' configuration window. It has a title bar 'CloudCTI Recognition Configuration Tool' and a close button. The main heading is 'Client call notification' with a sub-instruction: 'Configure the information you want the client to show when a caller is recognized from this set'. Below this is a preview box for an 'Incoming call' notification. The preview shows: 'Company: Company', 'Contact: Firstname Lastname', 'Number: Caller number', and 'Source: Application name'. A note below the preview states: '* Windows allows a maximum of 255 characters'. At the bottom of the preview area are two buttons: 'Add recognition field' and 'Add call field'. At the very bottom of the window are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

5) URI that calls the SuperOffice Web Tools application with required recognition fields.

The screenshot shows the 'Enter the webpage you want to open' configuration window. It has a title bar 'CloudCTI Recognition Configuration Tool' and a close button. The main heading is 'Enter the webpage you want to open' with a sub-instruction: 'To call a "superoffice:" link, the SuperOffice Web Tools plugin be installed on the user's pc. The URI below will display the Company card on the first tab. Optionally, you can link to an other tab by creating your own superoffice uri via the "Copy shortcut" button within SuperOffice Online - Company view.' Below this is a 'Script name' field with a 'View details' button next to it. Below that is a 'Webpage' field containing the URI: 'live?contact_id=\${ContactID}&previewperson_id=\${PersonID}&person_id=\${PersonID}'. Below the 'Webpage' field are two lists. The left list is titled 'Click on a recognition field to add it to the webpage' and contains: ContactID, Company, Category, Code, Number, Orgnumb, Business, Department, Street address, Street postcode, Street city, Postal address, Postal address 2, and Postal address 3. The right list is titled 'Click on a call field to add it to the webpage' and contains: Caller number, Caller name, Device number, Device name, Ddi number, Ddi name, Start time, and Application name. Below the left list is a link: 'Restore the default webpage'. At the bottom of the window are three buttons: 'Test script', 'Next' (highlighted with a blue border), and 'Cancel'.

6) You can configure and add additional scripts



7) Check the configuration summary and click finish to add the recognition from SuperOffice Online

