

How to configure caller recognition and screen-pop for:

SuperOffice 7 Windows

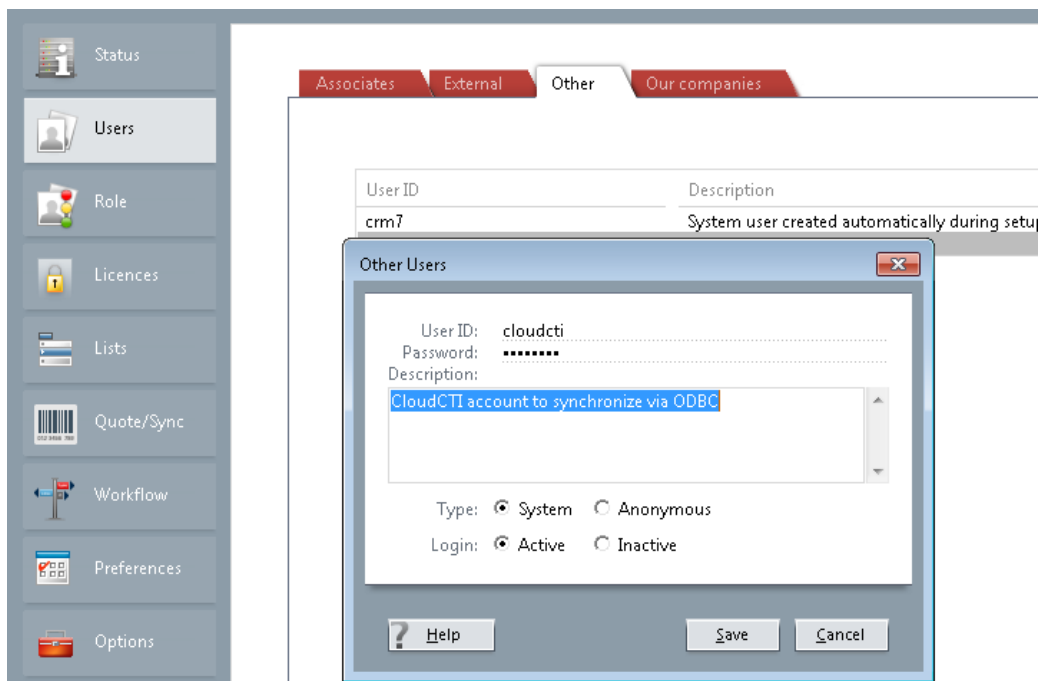
Supported versions: 7.x

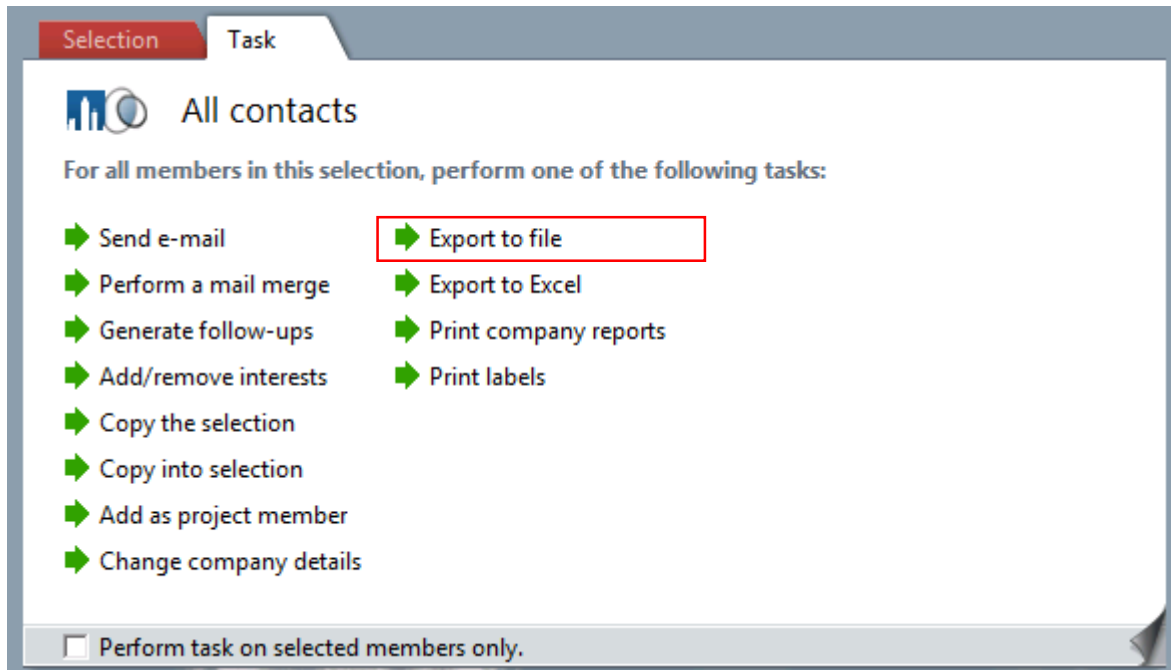
Contact replication method: ODBC

Screen pop method: proprietary COM interface

Prerequisites

To synchronize data using ODBC, you will require credentials to access the database. Via the SuperOffice Administration tool, you can go to “Users > Other” and add a new user to access the database.





For exporting contact info to file you can create custom template files which determine what is exported. Any fields that are selected you can also configure to be shown in the incoming call notification. However, please note that for the recognition and screen pop function you will minimally need to export a contact's phone number, name and contact-id. Store the text file on a location on your local hard drive which is accessible to the Recognition service.

Notes

SuperOffice offers a number of methods for easy outbound dialing. To enable this functionality the phone settings must be configured as shown below. Please fill in 'C:\Windows\makecall.exe' for the application and '/number=%n' for the parameters.

Preferences - Dialling setup

Dial by using:

- Modem
- Program started from command line
- DDE

Preferences

Let SuperOffice format the number

Local Area Code:

Long Distance Prefix:

Prefix:

Suffix:

Application

File: **C:\Windows\makecall.exe** [Browse]

Working Directory: [Browse]

Parameters: **/number=%n**

DDE Service: Type:

DDE Topic: poke

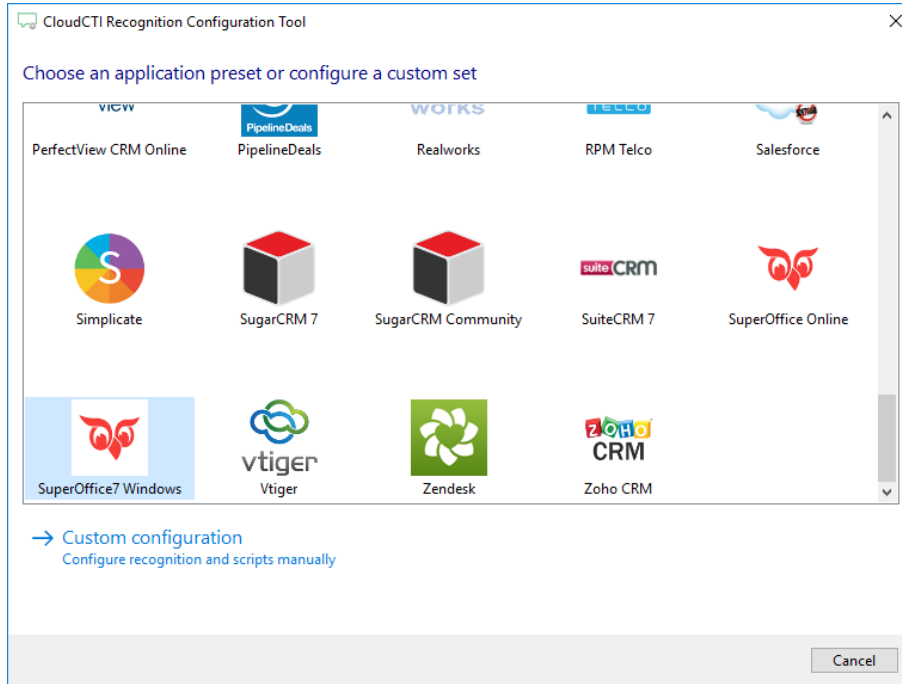
DDE Item: request

DDE Data: execute

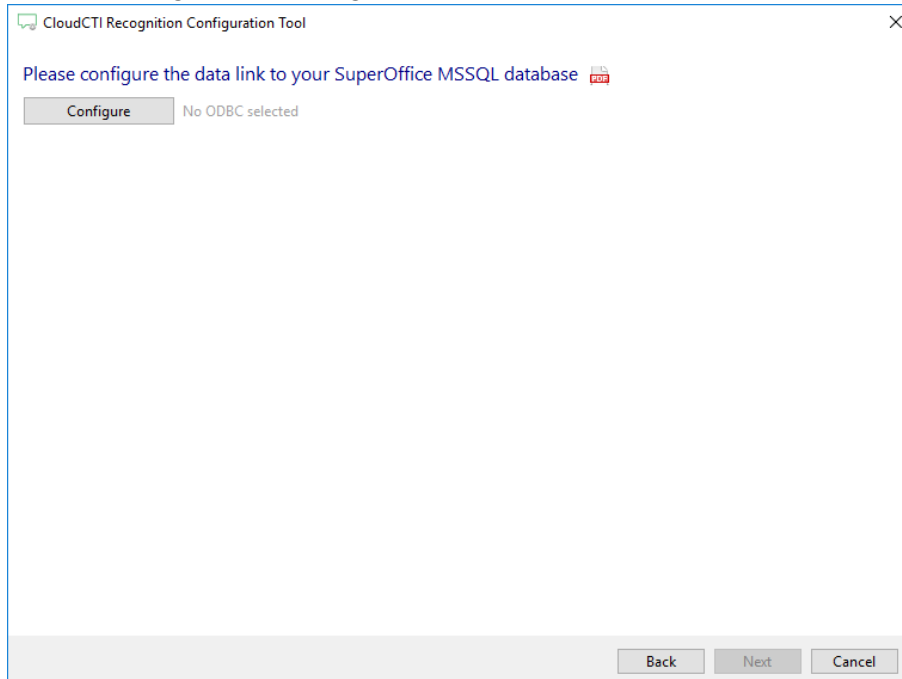
? Help Setup Test Default Save Cancel

Configuration steps

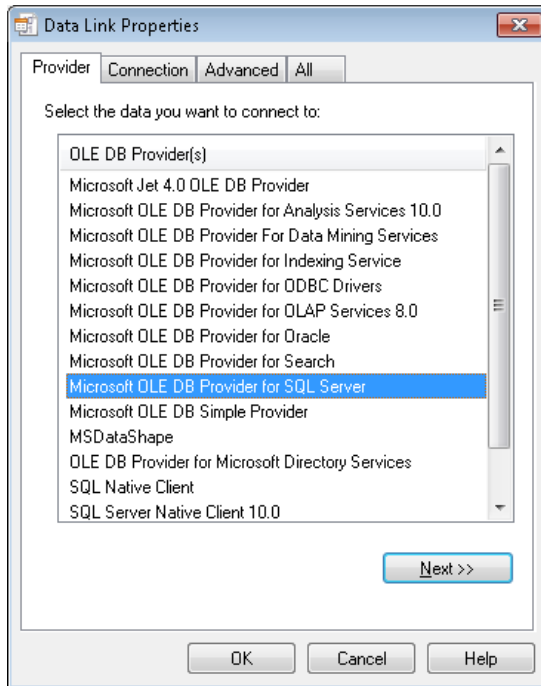
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'SuperOffice7 Windows', as shown below.



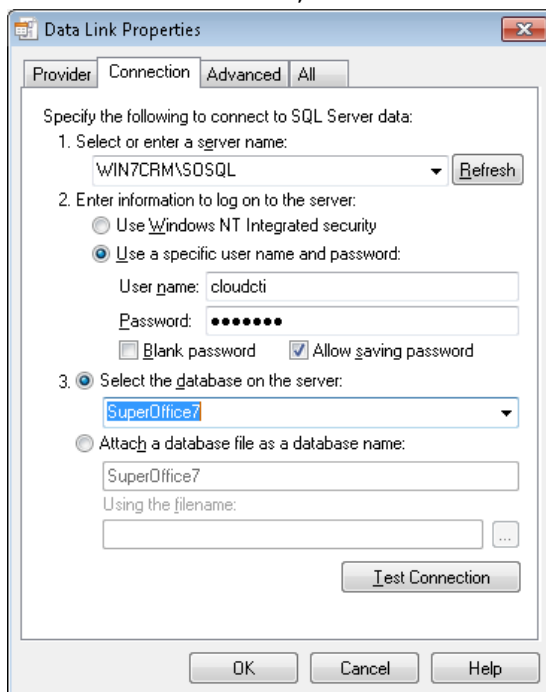
- 2) Press "Configure" to configure the ODBC connection.



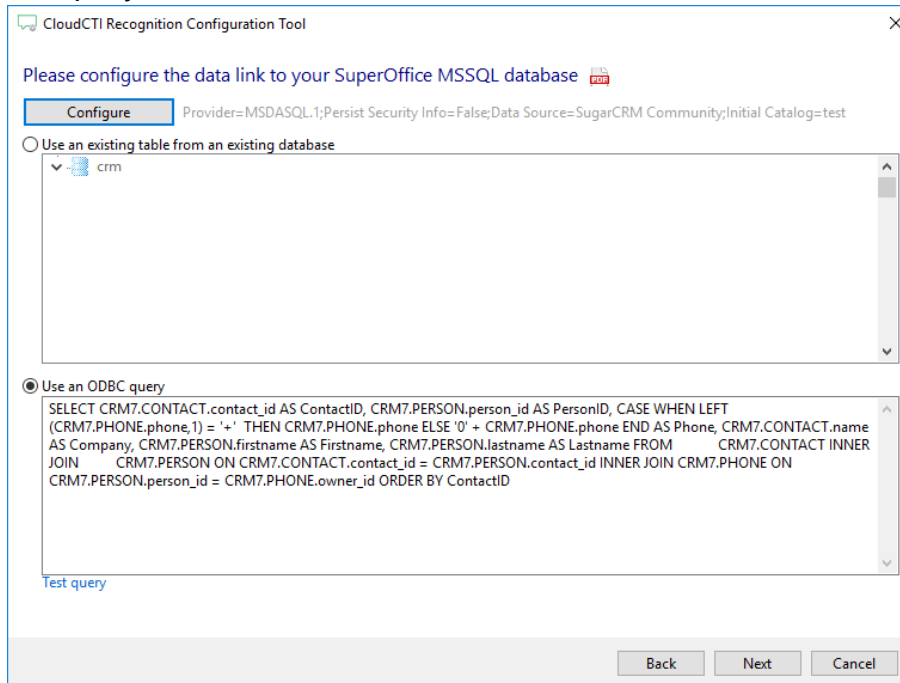
- 3) Select “Microsoft OLE DB Provider for SQL Server” and press “Next >>”




- 4) Fill in the server name, credentials and select the SuperOffice database



- 5) The wizard shows a predefined SQL Query to retrieve SuperOffice contact data. Leave this by default. Only if you have proper knowledge on SQL and SuperOffice you may alter this query.



CloudCTI Recognition Configuration Tool

Please configure the data link to your SuperOffice MSSQL database 

Configure Provider=MSDASQL.1;Persist Security Info=False;Data Source=SugarCRM Community;Initial Catalog=test

Use an existing table from an existing database

crm

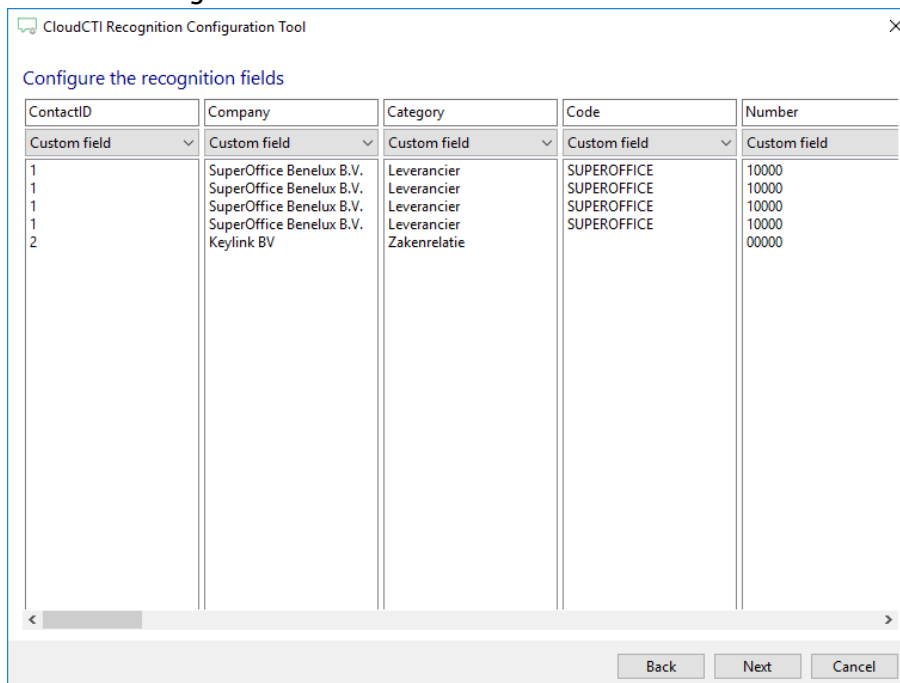
Use an ODBC query

```
SELECT CRM7.CONTACT.contact_id AS ContactID, CRM7.PERSON.person_id AS PersonID, CASE WHEN LEFT(CRM7.PHONE.phone,1) = '+' THEN CRM7.PHONE.phone ELSE '0' + CRM7.PHONE.phone END AS Phone, CRM7.CONTACT.name AS Company, CRM7.PERSON.firstname AS Firstname, CRM7.PERSON.lastname AS Lastname FROM CRM7.CONTACT INNER JOIN CRM7.PERSON ON CRM7.CONTACT.contact_id = CRM7.PERSON.contact_id INNER JOIN CRM7.PHONE ON CRM7.PERSON.person_id = CRM7.PHONE.owner_id ORDER BY ContactID
```

[Test query](#)

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- 6) Check the imported table analysis. 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.



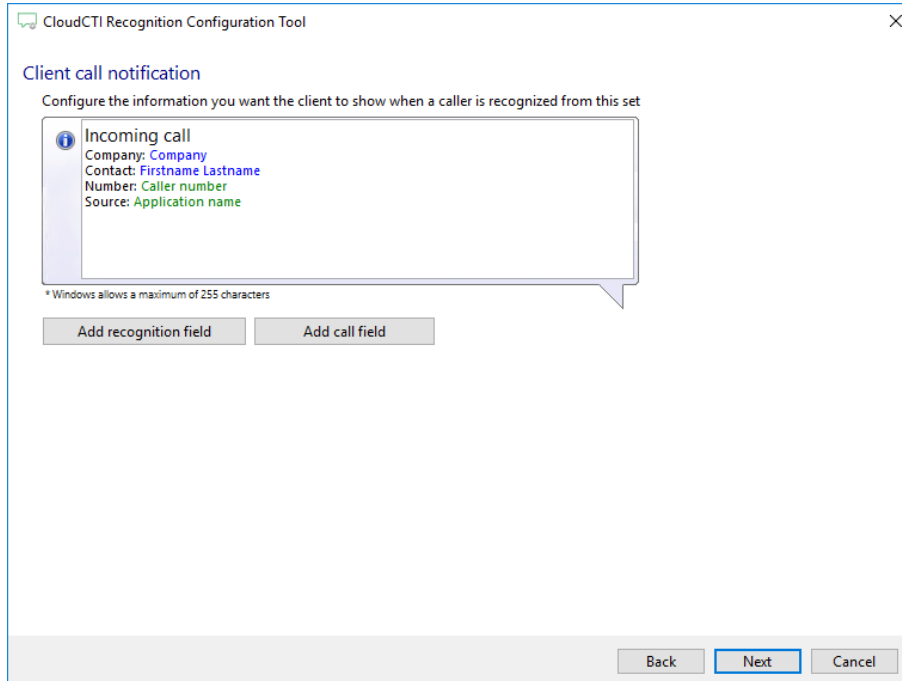
CloudCTI Recognition Configuration Tool

Configure the recognition fields

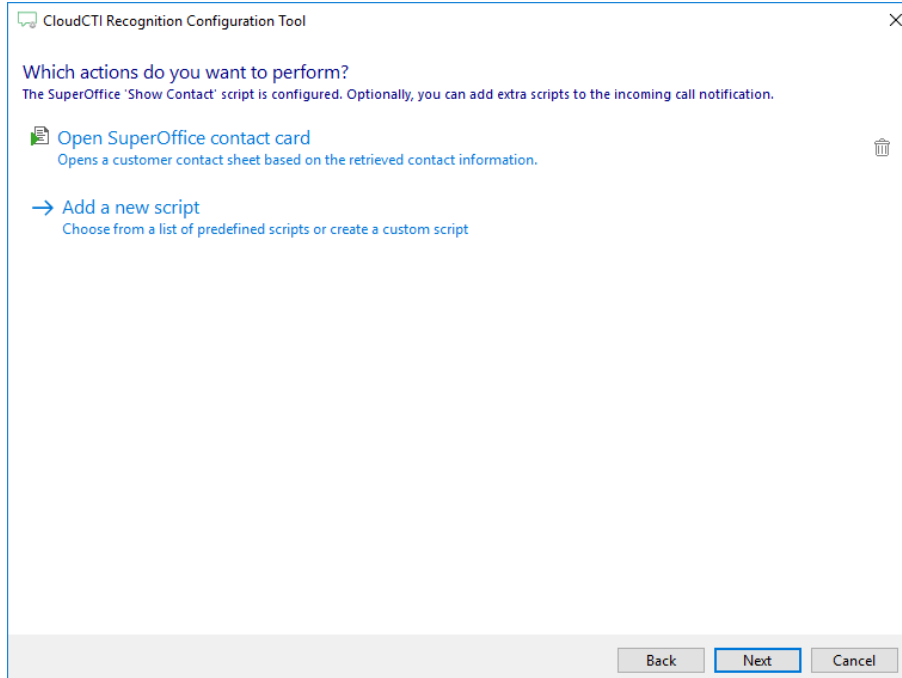
ContactID	Company	Category	Code	Number
Custom field	Custom field	Custom field	Custom field	Custom field
1	SuperOffice Benelux B.V.	Leverancier	SUPEROFFICE	10000
1	SuperOffice Benelux B.V.	Leverancier	SUPEROFFICE	10000
1	SuperOffice Benelux B.V.	Leverancier	SUPEROFFICE	10000
1	SuperOffice Benelux B.V.	Leverancier	SUPEROFFICE	10000
2	Keylink BV	Zakenrelatie		00000

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



8) There is a script preconfigured. You can add additional scripts if required. Press 'Next' to continue



- 9) Check the configuration summary and click finish to add the recognition from SuperOffice7 Windows.

