CRM INFO

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.

Status	Associates External Other Our companies
Users	
Role	User ID Description Crm7 System user created automatically during setu
Licences	Other Users
Lists	User ID: <b>cloudcti</b> Password: Description:
Quote/Sync	CloudCTI account to synchronize via ODBC
Workflow	Type:  System  Anonymous
Preferences	Login: • Active O Inactive
- Options	<u>Help</u>





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.



O Modem		
<ul> <li>Program start</li> </ul>	ed from command line	
O DDE		
Preferences		
Let SuperOffic	e format the number	
Local Area Code:		
Long Distance Pr	efix:	
Prefix:		
Suffix:		
Annlingtion		
File	C:\Windows\makecall.eve	
Working Director		
Parameters:	/number=%n	
DDE Service:	///////////////////////////////////////	Tyne:
DDE Tonic:		noke
DDE Item:		C request
DDE Data:		C execute
		No execute



## **Configuration steps**

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (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.

🧔 CloudCTI Recognition Configuration Tool	×
Please configure the data link to your SuperOffice MSSQL database 📷	
Configure No ODBC selected	
Back Next Cance	4



3) Select "Microsoft OLE DB Provider for SQL Server" and press "Next >>"



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

📑 Data Link Properties 🛛 🗾 🔁				
Provider Connection Advanced All				
Specify the following to connect to SQL Server data:				
1. Select or enter a server name:				
WIN7CRM\SOSQL - <u>R</u> efresh				
2. Enter information to log on to the server:				
<ul> <li>Use a specific user name and password:</li> </ul>				
User <u>n</u> ame: cloudcti				
Password:				
Blank password Value Saving password				
3,  Select the <u>d</u> atabase on the server:				
SuperOffice7				
Attach a database file as a database name:				
SuperOffice7				
Using the filename:				
Iest Connection				
OK Cancel Help				



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	
v-≝ cm	^
	~
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 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	
Back Next Cance	I

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.

ContactID	Company	Category	Code	Number
Custom field	<ul> <li>Custom field</li> </ul>	Custom field $\sim$	Custom field $\sim$	Custom field
1 1 2	SuperOffice Benelux B.V. SuperOffice Benelux B.V. SuperOffice Benelux B.V. SuperOffice Benelux B.V. Keylink BV	Leverancier Leverancier Leverancier Zakenrelatie	SUPEROFFICE SUPEROFFICE SUPEROFFICE SUPEROFFICE	10000 10000 10000 00000 00000
c				1



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

	Incoming call			
0	Company: Company Contact: Firstname Lastnam Number: Caller number Source: Application name	le		
* Windo	ws allows a maximum of 255 charac	cters		
	Add recognition field	Add call field		
	Add recognition field	Add call field		
	Add recognition field	Add call field		
	Add recognition field	Add call field		
	Add recognition field	Add call field		
	Add recognition field	Add call field		

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

CloudCTI Recognition Configuration Tool	×
Which actions do you want to perform? The SuperOffice 'Show Contact' script is configured. Optionally, you can add extra scripts to the incoming call notification. Popen SuperOffice contact card Opens a customer contact sheet based on the retrieved contact information.	Î
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next	Cancel



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

🧔 CloudCTI Recognition Configuration Tool	×
Summary	
Application	
SuperOffice7 Windows	
Recognition	
Recognition from ODBC table accounts	
Scripts	
Open SuperOffice contact card:	
	Back Finish Cancel