

How to configure caller recognition and screen-pop for:

# **Syntess Atrium Professional**

Supported versions: 4.3 Contact replication method: TXT/CSV Screen pop method: Keystrokes

### **Prerequisites**

Caller recognition and pop-up require a TXT/CSV export containing customer data from Syntess Atrium Professional. Atrium supports many flexible methods to create export files. The help documentation (available by pressing F1) describes general approaches using the reporting tool. For example, if you start the reporting tool via 'Stamgegevens/Relaties/Relaties' with CTRL-P, you can choose your .csv as output format.

Any exported field can be shown in the preview notification of an incoming call. Naturally, the telephone numbers that should be recognized should be included in the export, as should the relation codes which are used by the screen-pop script. All phone number formats are supported. They will be normalized when synchronized by the Recognition Update Service.

### Notes

For outbound dialing, select a phone number and use the dial hotkey.

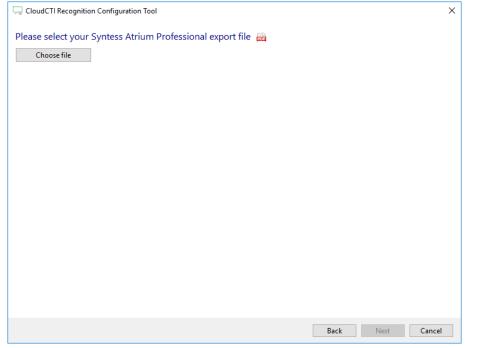


## **Configuration steps**

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 'Syntess Atrium Professional', as shown below.

🖓 CloudCTI Recognition Configuration Tool						
Choose an application preset or configure a custom set						
PerfectVi	iew 9 Pe	rfectView CRM Online	PipelineDeals	Promedico ASP	Realworks	^
BPI	м					
TELO		salesforce	<b>_</b>			
RPM Te	elco	Salesforce	Simplicate	SugarCRM 7	SugarCRM Community	
		700	700			
suite (C	an			Syntess Atrium	vtiger	
SuiteCR	M 7	SuperOffice Online	SuperOffice7 Windows	Syntess Atrium Professional	Vtiger	
						*
Custom configuration Configure recognition and scripts manually						
					-	_
					Cance	1

2) Select the CSV export file which contains the customer data and press Next





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

			a caller is recognized fr	]	
0	Incoming call Name: Relatienaam Number: Caller number Source: Application name				
* Wind	ows allows a maximum of 255 charact	ters			
	Add recognition field	Add call field		•	

4) By default, the popup is configured to open the "Syntess Atrium Professional window. Check if the file location is correct.

🧔 CloudCTI Recognition Configuration Tool		×		
Choose how the script can find the application				
Shows relation based on the retrieved contact in	formation.			
c · .	Show relation			
Script name	Show relation			
Search all running applications and match or	a part of the application path			
C:\Program Files\Syntess\Atrium\Bin\Atrium	n.exe	Browse		
Start the application if it is not active (full path required)				
Search all running applications and match on a part of the visible application name				
Syntess Atrium Professional				
Choose from a list of active applications				
Restore the default search parameters				
Test script	Next	Cancel		



5) The script automates user actions to perform a search using the relation code. Test the script using the "Test script" link at the bottom-left.

C 🗔 Application pop-up installation
Configure which actions need to be performed after the application is activated Use the virtual keyboard below to specify the required actions.
Esc     F1     F2     F3     F4     F5     F6     F7     F8     F9     F10     F11     F12     Print     Scroll     Pause     United States     V
$\begin{array}{c ccccccccccccccccccccccccccccccccccc$
The actions you have configured so far
Pause 100 Alt S R R Pause 250 Ctrl Shift F Pause 100 Recognition Code Enter
Test script
Next Cancel

6) Check the configuration summary and click finish to add the recognition from Syntess Atrium Professional

CloudCTI Recognition Configuration Tool	×			
Summary				
Application				
Syntess Atrium Professional				
Recognition				
Recognition from import file C:\Temp\EXPORTS\Syntess-voorbeeld-export-gefabriceerd.csv				
Scripts				
Show relation: Perform an action in application C:\Program Files\Syntess\Atrium\Bin\Atrium.exe with caption Syntess Atrium Professional [+ 9 keystrokes]				
Back Finish Cance	I			