

How to configure caller recognition and screen-pop for:

Tigerpaw

Contact replication method: ODBC

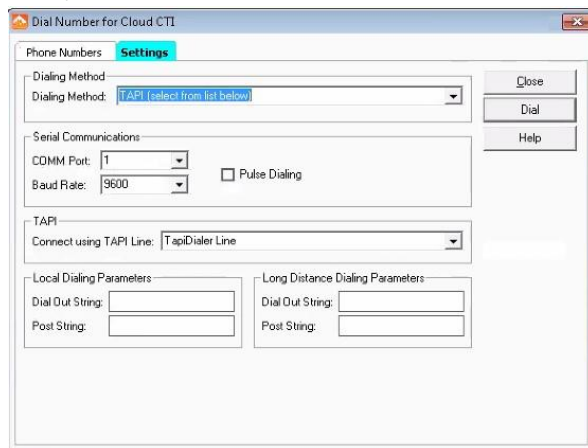
Screen pop method: Keystroke emulation

Notes

For the caller recognition all the phone numbers in the Tigerpaw database are stored in a 'cache'. The numbers are automatically replicated in a standard format and indexed so the caller number can be matched quickly on an incoming call. By default, the contact and/or account names are shown in the notification and these are cached with the numbers.

The recognition synchronization service, installed with the Recognition Configuration Tool, only reads from the database and typically updates the numbers once per day. The performance is optimal if the tool is installed on the database server.

For outbound dialing Tigerpaw supports click-to-dial using TAPI. A TAPI service provider is part of the client installation and will automatically be available in Tigerpaw under the generic name 'TapiDialer Line', see screenshot below.

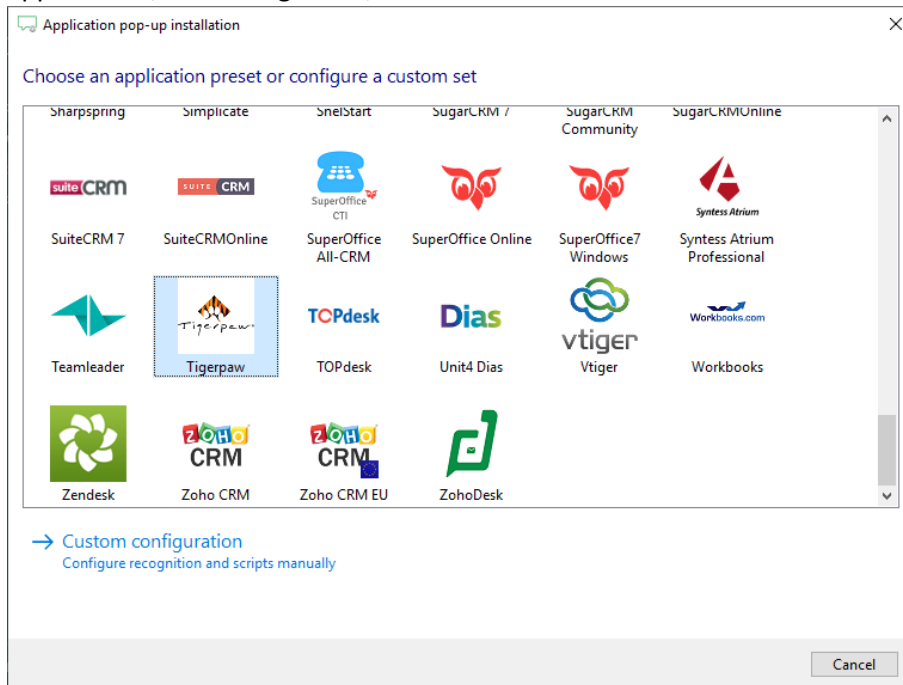


Prerequisites

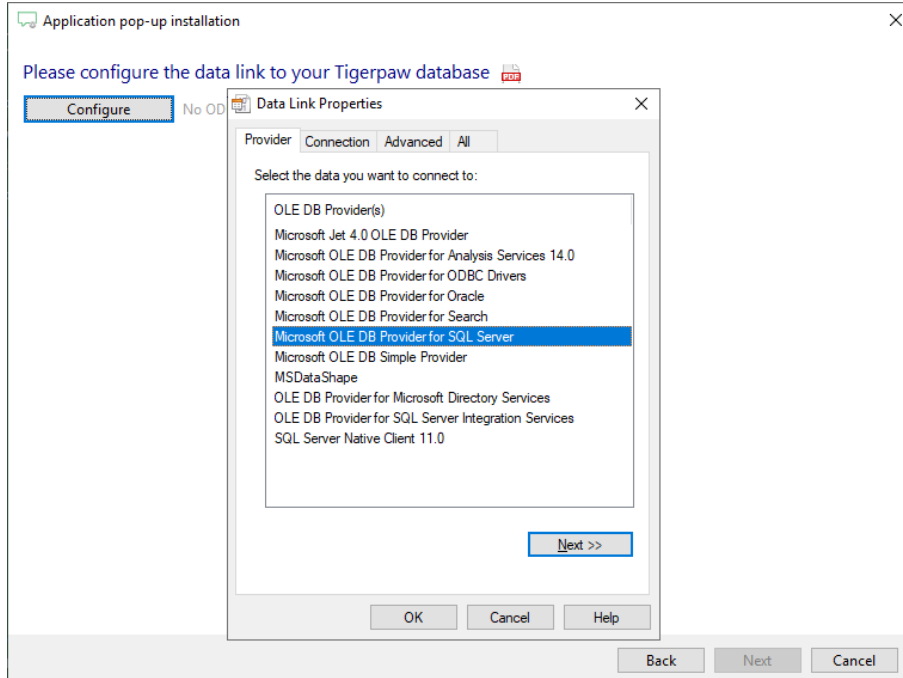
Locate your Tigerpaw database and ensure you have a valid SQL server login with a user with read permission. For a detailed description on how to set up the ODBC connection, see the [ODBC Contact Replication Manual](#).

Configuraton steps

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



- 2) Configure the ODBC settings to your Tigerpaw MS SQL server.



In the second Data Link Properties screen, do not forget to check the 'Allow saving password' option and to select the Tigerpaw database!

Application pop-up installation

Please configure the data link to your Tigerpaw database PDF

Configure No OD Data Link Properties

Provider Connection Advanced All

Specify the following to connect to SQL Server data:

1. Select or enter a server name:
Tigerpaw server Refresh

2. Enter information to log on to the server:
☐ Use Windows NT Integrated security
☒ Use a specific user name and password:
User name: user
Password:
☐ Blank password ☒ Allow saving password

3. Select the database on the server:
[Dropdown menu]
☐ Attach a database file as a database name:
Using the filename: [Text field] Browse

Test Connection

OK Cancel Help

Back Next Cancel

3) Verify the first records found and the preselected column types. Click 'Next' to continue.

Application pop-up installation

Configure the recognition fields

AccountNumber	ContactName	RawPhoneNumber	AccountName
Custom field	Name	Phone number	Custom field
1	Bram	+15551231234	Bram Inc.
2	Peter	+15551231235	Peter & Sons
3	John	+15551231236	Johns Phone Parts

Back Next Cancel

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

Application pop-up installation

Client call notification

Configure the information you want the client to show when a caller is recognized from this set

Incoming call
Contact: [ContactName](#)
Company: [AccountName](#)
Number: [Caller number](#)
Source: [Application name](#)

* Windows allows a maximum of 255 characters

[Add recognition field](#) [Add call field](#)

[Back](#) [Next](#) [Cancel](#)

- 5) The 'Show Contact' script has been preconfigured. You can add additional scripts if required. Click 'Next' to continue.

Application pop-up installation

Which actions do you want to perform?

The Tigerpaw 'Show Contact' script is configured. Optionally, you can add extra scripts to the incoming call notification.

Show Contact
Activate Tigerpaw and show the caller's contact page

[Add a new script](#)
Choose from a list of predefined scripts or create a custom script

[Back](#) [Next](#) [Cancel](#)

- 6) Check the configuration summary and click 'Finish' to add the integration with Tigerpaw.

