

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.

D: F 11 H 1		
Dialing Method	Part I and I and	<u>C</u> lose
Dialing Method: Internetication		Dial
Serial Communications		Help
COMM Port: 1	Pulse Dialing	
Baud Rate: 9600 💌		
TAPI		
Connect using TAPI Line: TapiDial	ler Line	
Local Dialing Parameters	- Long Distance Dialing Parameters	
Dial Out Stripe:	Dial Out String	
Post String	Past Shing	

#### 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 <u>ODBC Contact</u> <u>Replication Manual</u>.



# 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.

application pop-up installation X
Places configure the data link to your Tigerpayy database.
Please configure the data link to your figerpaw database imi
Configure No OD Data Link Properties
Provider Connection Advanced All
Select the data you want to connect to:
OLE DB Provider(s)
Microsoft Jet 4.0 OLE DB Provider
Microsoft OLE DB Provider for Analysis Services 14.0
Microsoft OLE DB Provider for OLBC Drivers
Microsoft OLE DB Provider for Search
Microsoft OLE DB Provider for SQL Server
Microsoft OLE DB Simple Provider
OLE DB Provider for Microsoft Directory Services
OLE DB Provider for SQL Server Integration Services
SQL Server Native Client 11.0
Next >>
OK Cancel Help
Back Next Cancel



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

C Application pop-up installation
Application pop-up installation   Please configure the data link to your Tigerpaw database  Configure No OD  Data Link Properties   Provider Connection Advanced All  Specify the following to connect to SQL Server data:  Sector or enter a server   Effereman   Enter information to log on to the server:  Use Windows NT Integrated security  Use Mindows NT Integrated security  User mane:  Barsword:  Barsword:  Data a specific user name and password  Sector the gatabase on the server:  Data a specific user name and password  Sector the gatabase on the server:  Data a specific user name and password  Data a specific user name and password  Sector the gatabase on the server:  Data a specific user name and password  Data a sp
Using the [ilename:
OK Cancel Help
Back Next Cancel

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

🧔 Application pop-up insta	Illation			×
Configure the recogn	ition fields			
AccountNumber	ContactName	RawPhoneNumber	AccountName	
Custom field $\sim$	Name 🗸	Phone number V	Custom field $\sim$	•
1 2 3	Bram Peter John	+ 15551231234 + 15551231235 + 15551231236	Bram Inc. Peter & Sons Johns Phone Parts	
			Back	Next Cancel



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

C 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 a maximum of 255 characters	
Add recognition field Add call field	
Back Next Cance	I

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

Square 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	Î
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next 0	Cancel



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

C Application pop-up installation	×
Summary	
Application	
Tigerpaw	
Recognition	
Recognition from ODBC by custom query	
Scripts	
Show Contact: Perform an action in application Tigerpaw.exe with caption Tigerpaw [+ 19 keystrokes]	
Back Finish Can	cel