How to configure caller recognition and screen-pop for:

# WinCar

Contact replication method: ODBC or None
Screen pop method: WinCar Launcher Application

## Prerequisites

WinCar can be integrated following two different methods:

A. Do not synchronize any data and don't show any caller information in the notification from WinCar. A script will be configured that opens the matched contact withing the WinCar application. You only have to make sure the WinCar application is available at the following path for all users: 'c:\contactcenter\launcher.exe'.

B. Synchronize the contact information automatically with a direct database connection using the Microsoft SQL ODBC driver. The notification will show the name of the caller and, optionally, any other field you want to show from the database. You also have to make sure the WinCar application is available at the following path for all users: 'c:\contactcenter\launcher.exe'.

### Method B - ODBC

The Microsoft SQL ODBC driver is pre-installed on Windows. In order to configure the connection to the database the Recognition Update Service requires SQL login credentials from the database. These credentials should allow read access on the Relation table with the phone numbers. If additional information is desired, then the credentials should have read access to the additional tables. Custom queries can be configured in the tool, but it may be easier to simply create a custom view within the SQL server which contains exactly the information that should be synchronized and the credentials having only access to that specific view.

## Notes

For outbound dialing you can use the 'makecall.exe' application which is installed with your client.

## Configuration steps

1) Start by clicking 'add recognition' in the Recognition Configuration Tool. From the list of applications, choose 'WinCar', as shown below.



2) For method A choose the option 'WinCar – Screenpop only' **and continue directly to step 6**, for method B choose 'WinCar - ODBC'
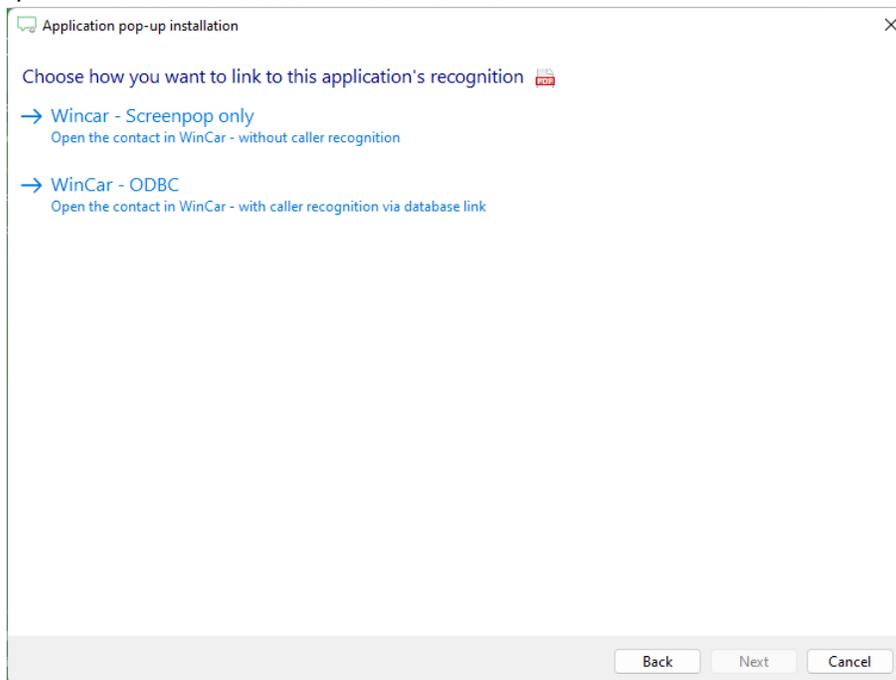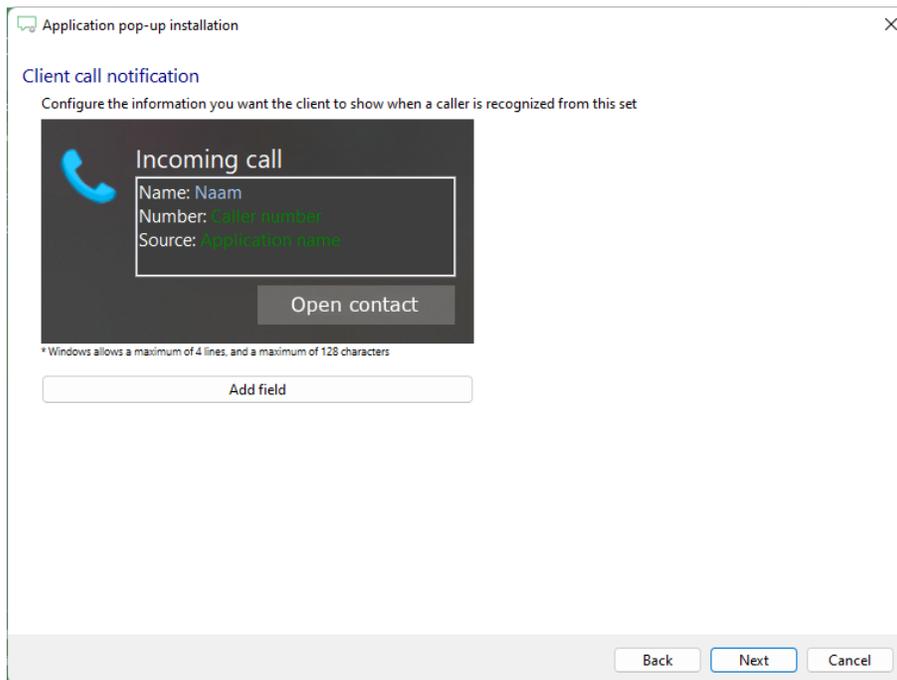
3) B) If you chose 'ODBC' then specify the server name and valid credentials. 'Allow saving passing' must also be checked to give access to the Recognition Update Service.
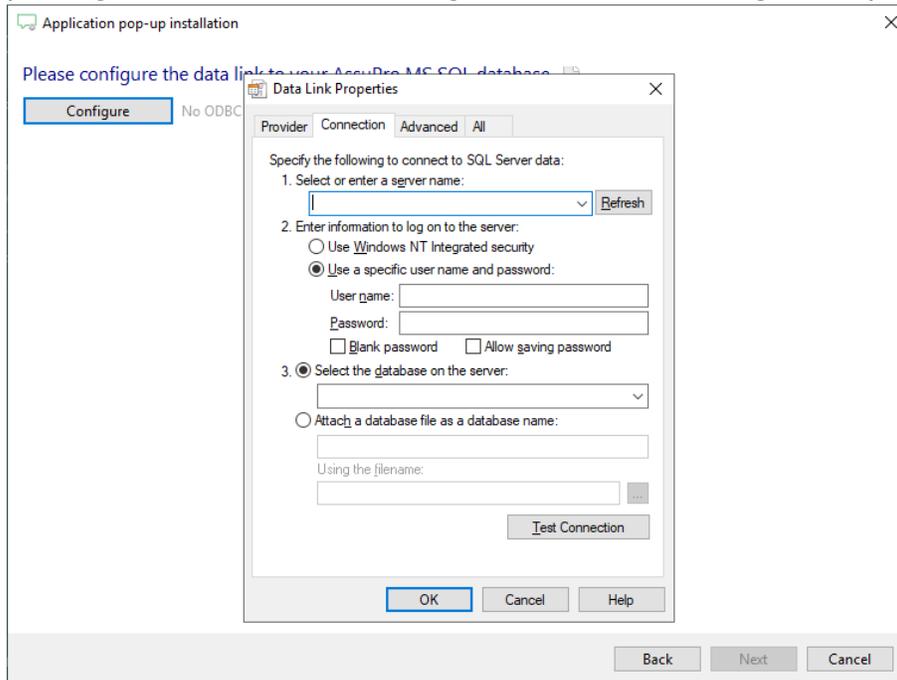


4) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.
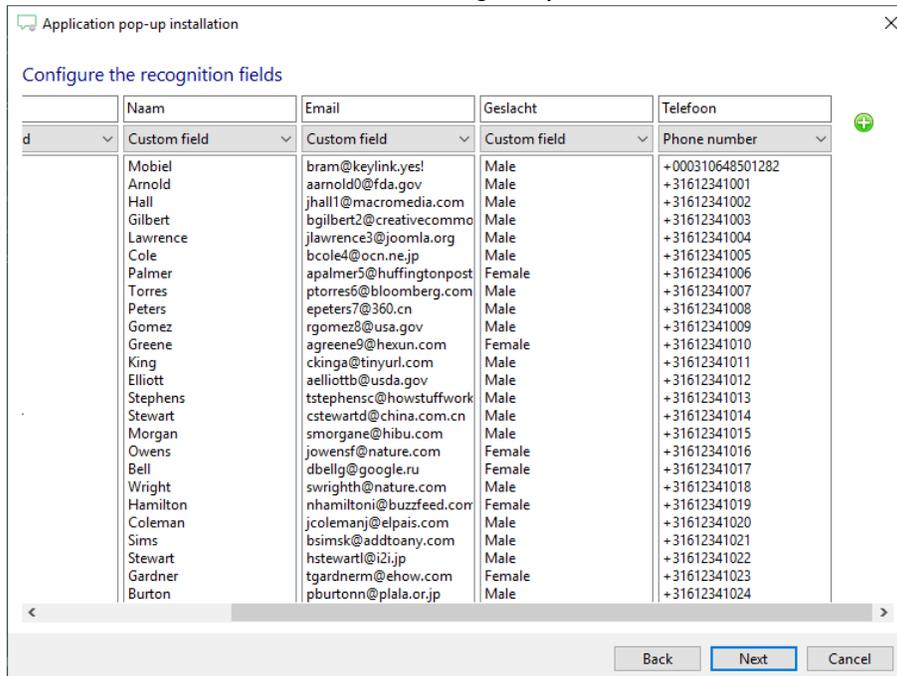
5) Choose which fields to display in the call notification on an incoming call. Click 'Next' to continue.



6) The pre-configured script uses the WinCar launcher application, of which the path should be 'c:\contactcenter\launcher.exe', to show the caller's info within WinCar with the matching 'Caller Number'. Click 'Next' to continue.

7) After you have configured the script you can configure additional scripts or click 'Next' to continue.
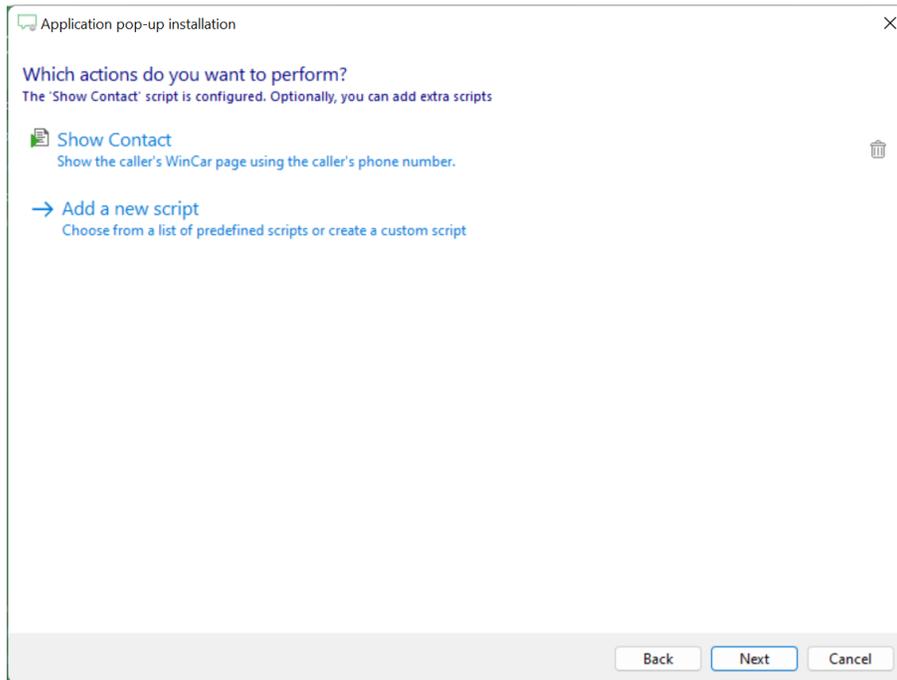


8) Check the configuration summary and click 'Finish' the integration with WinCar.