Installation manual

for the CloudCTI Recognition Configuration Tool 2.0

Last revision: 21 June 2017

System requirements

Before installation, please make sure your system meets the requirements for the CloudCTI Recognition Configuration Tool according to the table below:

Component	CloudCTI Recognition Configuration Tool Requirements
Computer and processor	1 gigahertz (GHz) or faster x86- or x64-bit processor
Memory (RAM)	512 megabytes (MB) of system memory
Hard Disk	50 megabytes (MB) of hard disk space
Display	800 x600 resolution or higher monitor
Operating System	Windows 7 (32-bit or 64-bit) or later
Network	Internet access capability, outgoing connection to port 80 and 443
.NET version	Some proprietary CRM replication API's (e.g. Salesforce, MS CRM Online) require .net framework 4.5.
Additional requirements and considerations	The Recognition Update Service will be installed. To regularly synchronize all contact info this must be kept running in the background.

Additionally, the use of the CloudCTI Recognition Configuration Tool requires valid user credentials with the 'recognition configuration' privilege. The application integration is configured for the whole organization and this privilege prevents unauthorized user from accidentally modifying or clearing organization wide shared settings.

Product features

- Recognition can be synchronized from the following data sources:
    - Any ADO supported data source. These are configured by setting up an ODBC connection string.
    - Text files (e.g. *.txt or *.csv files). Any string format, separator, text qualifier and end-of-line standard is supported and automatically detected.
    - Excel binary files.
    - A continuously expanding list of data sources with proprietary API's (such as MS CRM Online, Zendesk, Zoho, etc).
- Phone number normalization
  All phone numbers from data sources are normalized based on the configured country code. Optionally, the area code can be added to incomplete numbers.
- Recognition and Screenpop
  Screen pop scripts can be configured using one of the following methods:

- o Open a URL – a link to the caller's page is opened using the default browser
- o Run an executable with parameters – the client starts an executable that is part of the installation of the CRM application. This executable is not part of the CloudCTI installation.
- o Emulate keystrokes – a specific window can be brought to the foreground, given keyboard focus and keystrokes sent to the application.
- o Use a proprietary API – binaries with CRM specific instructions can be used to activate the caller's info (e.g. Outlook's COM interface). These binaries are not part of the CloudCTI client installation, but are downloaded (to %localappdata%\CloudCTI\scripts) or updated on the fly.
- Supported languages: English, Dutch

Installation

Download the CloudCTI Recognition Configuration Tool from http://cloudctidownload.cloudcti.nl/files/Setups/CloudCTIRecognitionConfigToolSetup.exe and run the installation file. This triggers the User Account Control dialog.
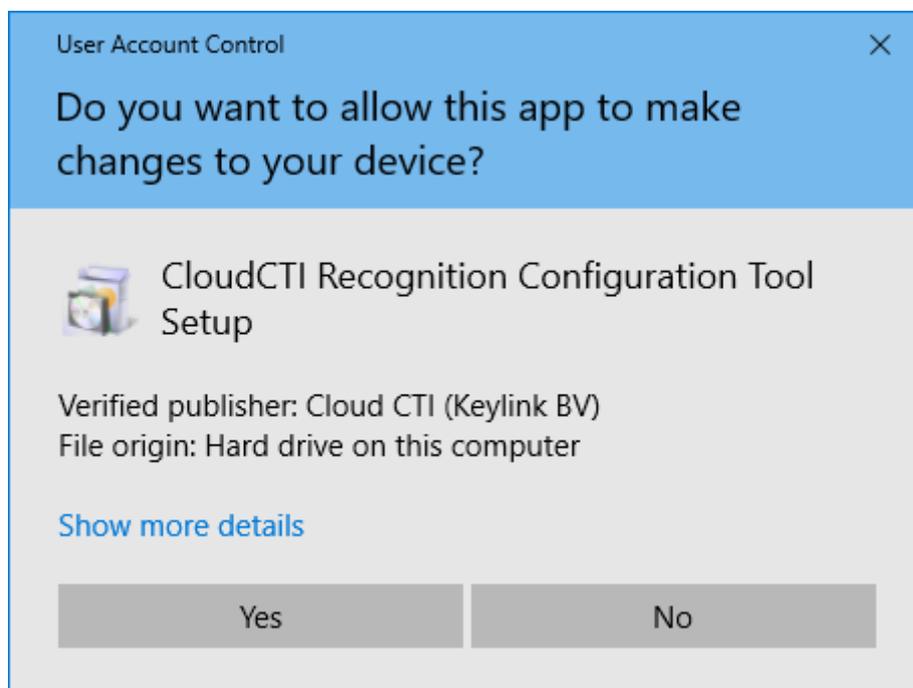
Make sure Cloud CTI (Keylink BV) is the verified publisher and click 'Yes' to allow the setup to make changes.

When the setup is ready to install it shows the following screen:
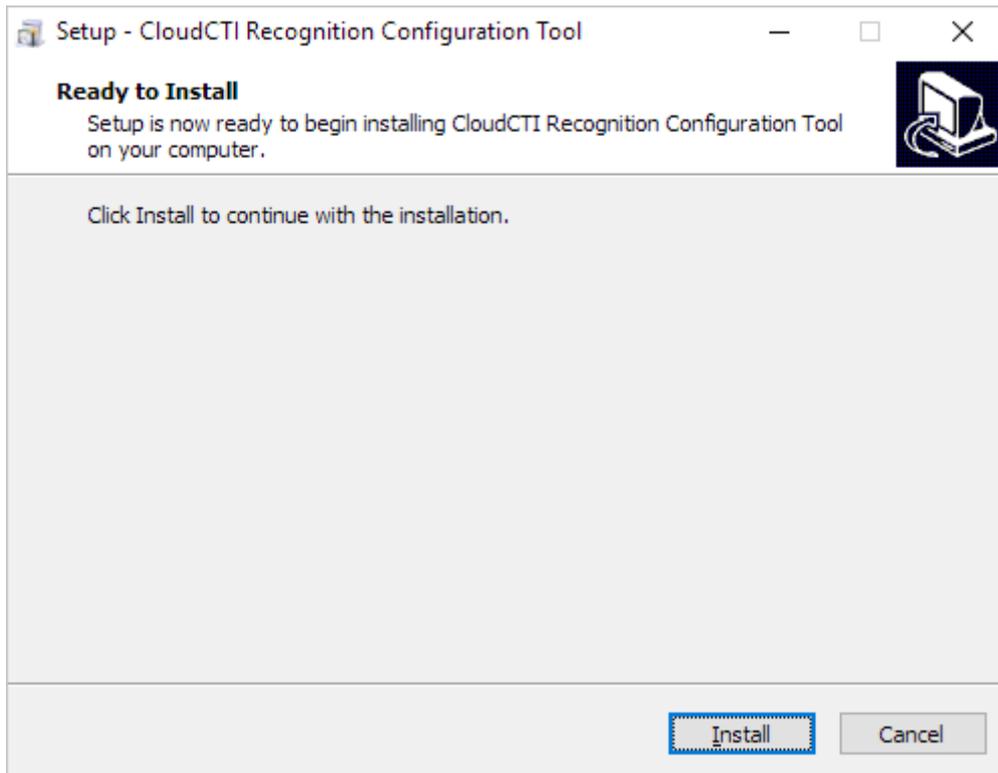
Click 'Install' to start the installation process.

The progress is shown during the installation. When it is finished, the setup will show the following screen:
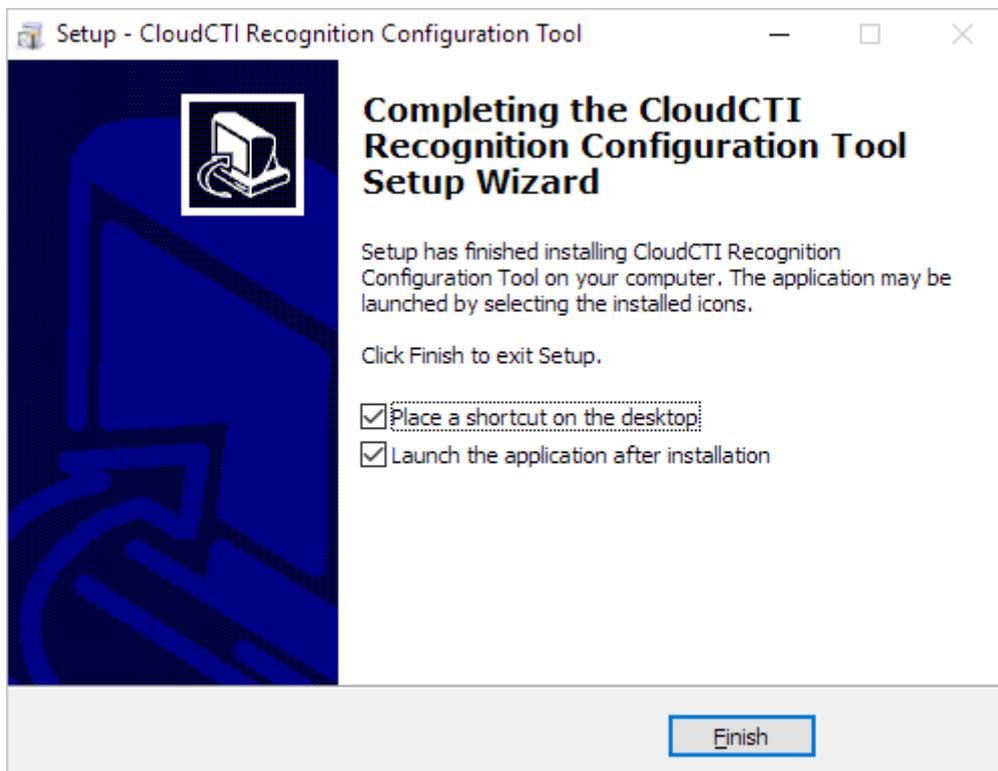
Select the desired options and click 'Finish' to complete the installation.

If the CloudCTI Recognition Configuration Tool is launched, it will initially show the 'sign in' dialog screen.
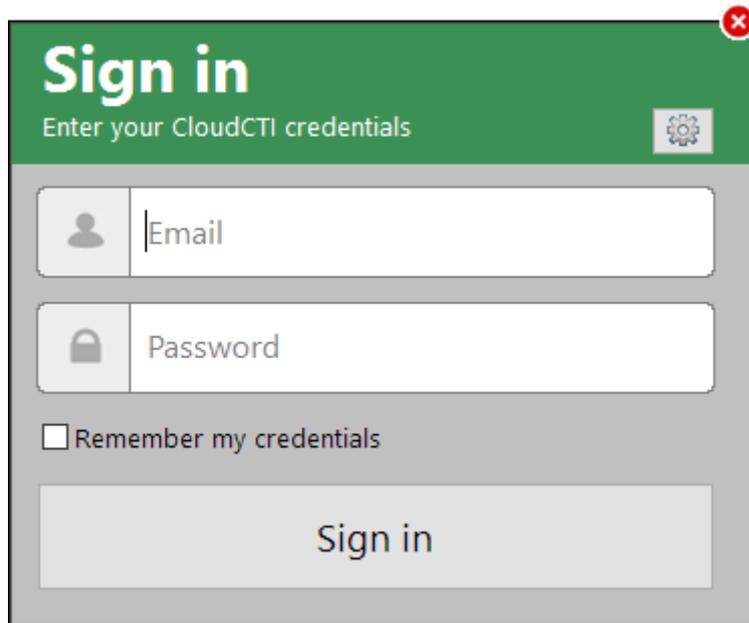
Enter your credentials to proceed. Clicking the cog wheel allows you to check for available updates, or change the display language. Because the language setting first used in this sign in dialog, it is independent of the CloudCTI account and it is stored locally. By default, the Windows UI language is used. If that language is not supported, English is used.

After sign in the CloudCTI Recognition Configuration Tool shows the configuration screen and it is now ready for use. Click 'Add application' to get started. For a full guide on how to use the tool, please refer to the user guide PDF, a link to which is available in the lower left corner of the CloudCTI configuration screen.

Maintenance and support

The CloudCTI Recognition Configuration Tool will notify the user if a new update is available. It is advised to always use the latest version to prevent unnecessarily experience issues which have already been fixed in later versions. If you do experience issues, also check the troubleshooting page online which is frequently updated and expanded. For support, please contact your telecommunications provider.