

CloudCTI Recognition Configuration Tool Manual

2016 – v2.0

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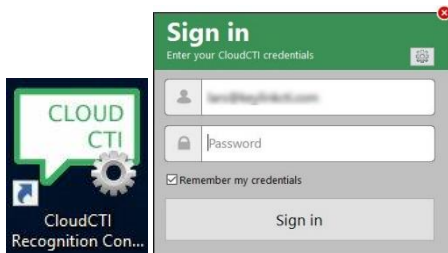
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2 Introduction

The “Recognition Configuration Tool” enables you to replicate data from your CRM application for customer recognition and pop-up with CloudCTI. The installation consists of:

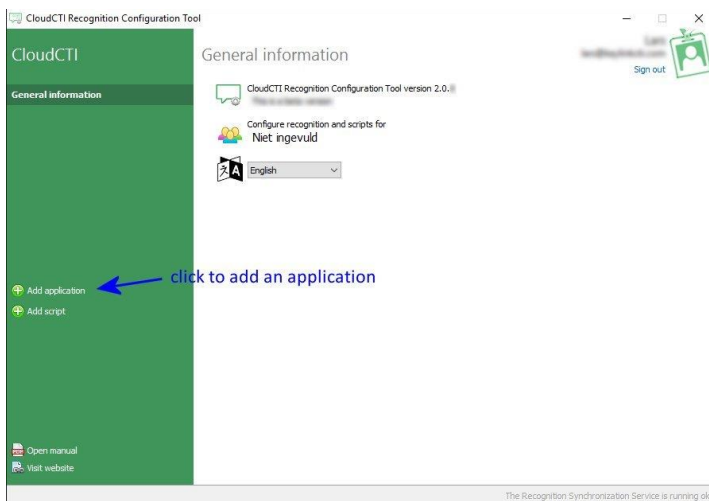
- CloudCTI Recognition Configuration Tool or **RCT**. This desktop application contains a wizard to guide you through setting up your application integration.
- Replication Update (Client) Service or **RUCS**. This windows service application updates the replication data on a regular basis.

2.1 Getting started



Start the RCT from your desktop. Sign in using your credentials. Please note that you must have the Recognition Tool privileges in order to access and use the tool. Privileges are managed by the tenant administrator.

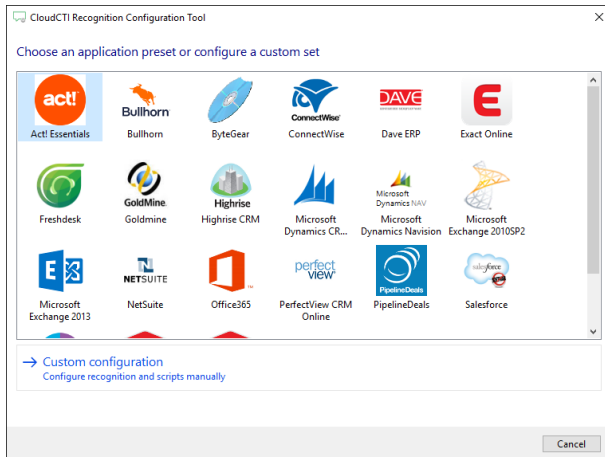
When you run the RCT for the very first time, the wizard will prompt to set up your first application. If not, please click **Add application** on the left side.




Now choose a preconfigured application from the grid or create your own. In both cases the wizard guides you through the following steps:



1. Data replication; How can the data be accessed and which data should be replicated? In most cases this includes phone numbers, customer name and some kind of an ID to facilitate smooth pop ups.
2. Notification balloon; Basic information displayed to the user on an inbound call.
3. Screen pop; Pops up your CRM/ERP application and opens the calling customer details, based on a unique ID from your data source.



3 Listed applications

After selecting a listed application, the wizard will guide you through specific application settings. All listed applications contain an installation guide, which can be accessed by clicking the  icon. The document contains information about application prerequisites, information on outbound dialing and a step-by-step instruction to complete the wizard.

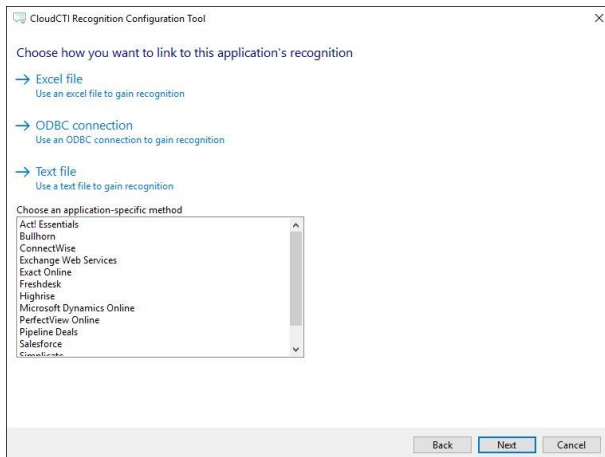
We are continuously expanding the collection of listed applications, however if your application is not yet listed you can easily connect your CRM using the wizard.

4 Custom configurations

4.1 Data source

Click [Custom configuration](#), the wizard prompts for a replication method for your application.

Choose the replication method which suits best. In most cases you will be using a Text-file format or ODBC connection, which are export formats used by many CRM applications. These formats are described in the next chapters.



4.1.1 Text file Replication

Almost all applications have the ability to export customer data to a TXT or CSV file. This file can be used as a source for data replication.

To use a text / csv file, please make sure that:

- The file is located on the same machine as the RCT and the RUCS has access to it. For example place the file in the folder "C:\data\export.csv".
- The text file is in CSV format, with a standard field separator (comma, semi-colon, tab) and has one record per line (line feed carriage return)
- The file contains at least one phone number, a name field and an ID, which is required to perform a screen pop.
- When updating the file, the file format and layout is the same. Both the filename and file location cannot be changed.

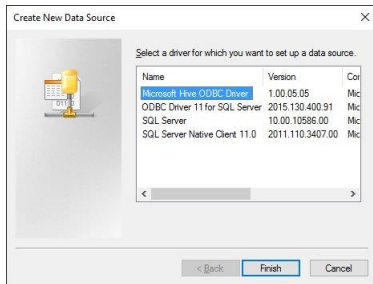
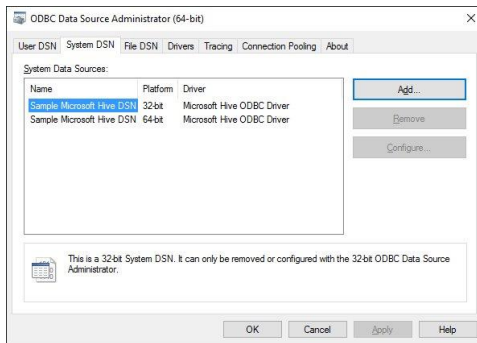
4.1.2 ODBC Replication

The wizard also provides a way to replicate data via [ODBC](#) and [OLE](#). First a system DSN (data source name) must be present or created. Finally to access the data, an OLE provider must be configured.

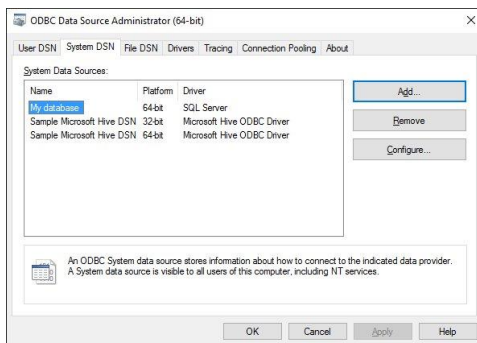
4.1.2.1 Create a new DSN

To create a DSN:

1. Open the Microsoft® ODBC Data Source Administrator tool by running `odbcad32.exe`,
2. select tab `System DSN` and then click button `Add...` to add a new ODBC data source,



3. select the driver and walk through that wizard,

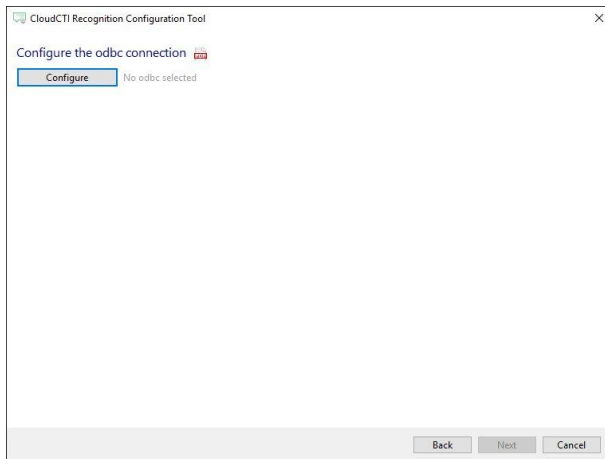


4. finally close the ODBC Data Source Administrator tool.

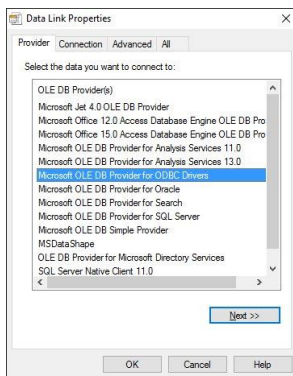
4.1.2.2 *Configure OLE provider*

Back in the RCT:

5. click **Configure** button.

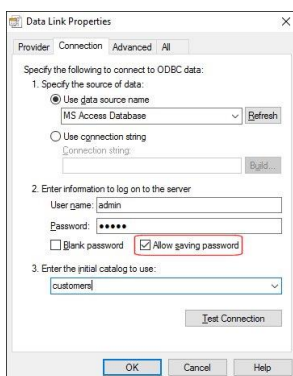


6. select Microsoft OLE DB Provider for ODBC Drivers from the list,
7. then click button **Next >>**,



Now you will be able to select your System DSN data source:

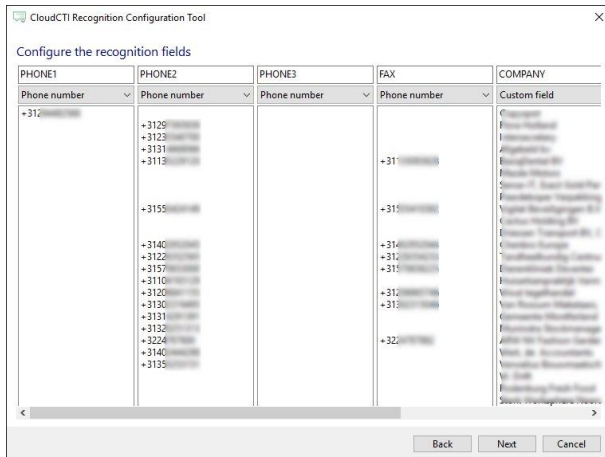
8. please enter your credentials and check the option **Allow saving password**,
9. optionally enter the initial catalog (database) to use.



10. Click **OK** to close this window.

4.2 Data preview

Once the connection to your data source is established successfully, the wizard will generate a preview of your data set. The wizard searches all columns containing a phone number and marks them as Phone number. If you are not satisfied with the result you can alter the column type with the drop down menu. CLIPs of incoming calls are matched on numbers found in a Phone number column. All other types of fields are for future use.

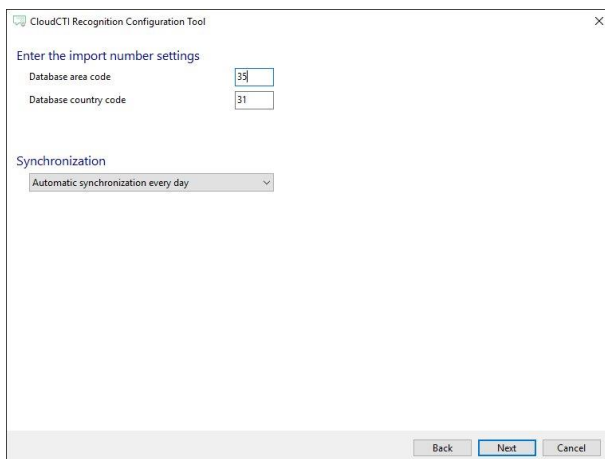


Click **Next** to continue.

4.3 Data replication settings

In this step you can make addition settings to your data source. If the data source contains regional phone numbers, or is physically located in another location, you may want to provide a database area code and country code from the country the database resides.

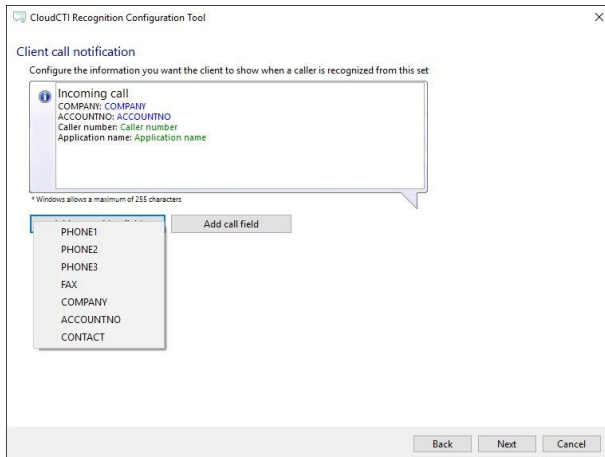
Initially the data is automatically replicated daily. You may update the frequency to a maximum of once per hour, depending on your data source.



Click **Next** to continue.

4.4 Notification Balloon

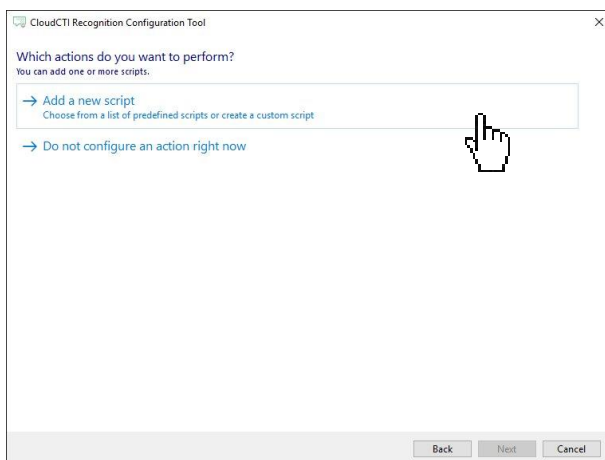
In this step you can configure the information displayed to the user on an inbound call. Customize the balloon with data from your data source and call information supplied by the communication platform plugin.



Click **Next** to continue.

4.5 Configure the application pop-up action

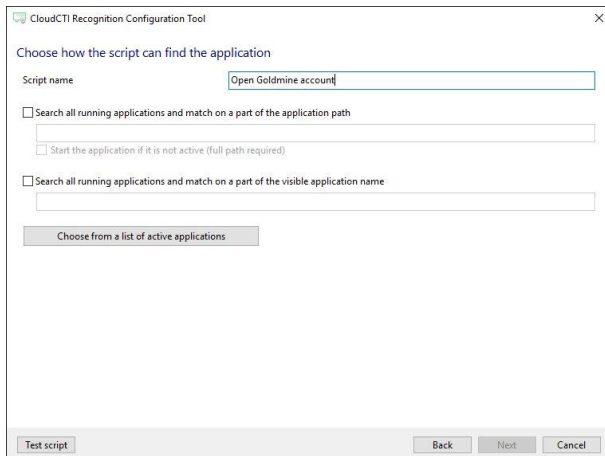
Choose the action to be performed on an incoming call with a recognized calling number. It is possible to configure more than 1 script or no script at all.



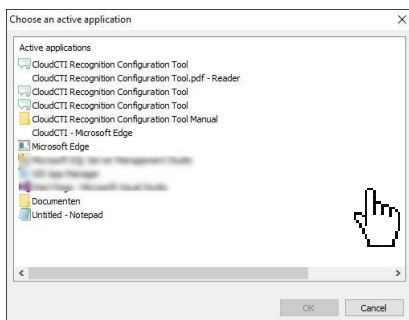
4.5.1 Perform an action in an active application

Often when accessing a CRM/ERP application after startup you have to sign in with a username and/or password. This step can be an obstacle in the automated screen pop process. Therefore it is recommended to perform a pop-up within an active application, after the user has successfully signed in. Click [Perform an action in an active application](#).

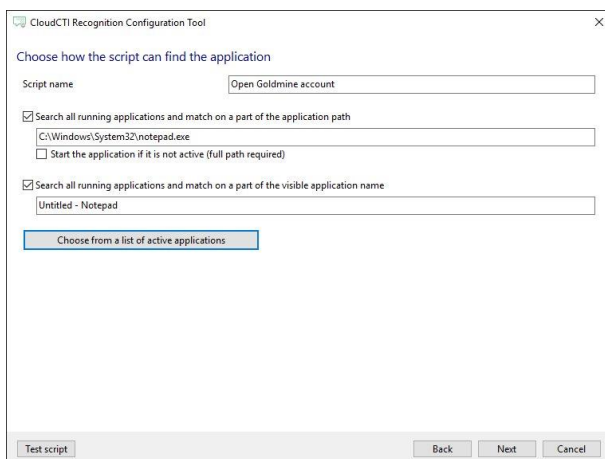
Click **Choose from a list of active applications**.



Select the active application from the list and click **OK**.



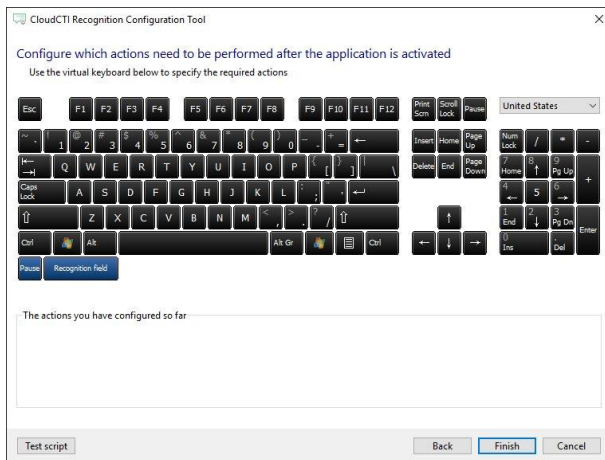
The wizard detects the process and application window name. The window matching the process and/or application window name will be brought to front when a pop up action is performed.



Press **Next** to continue.

Once the application window is brought to the foreground, you are able to send automated keystrokes to the application using the customer/contact ID from your data source to search for a specific record

in your CRM application. To test your script, click the [Test script](#) button. The test script uses data from the first record in your data source.



Please have a look at chapter *Best practice on keystrokes* for more information.

Click [Finish](#).

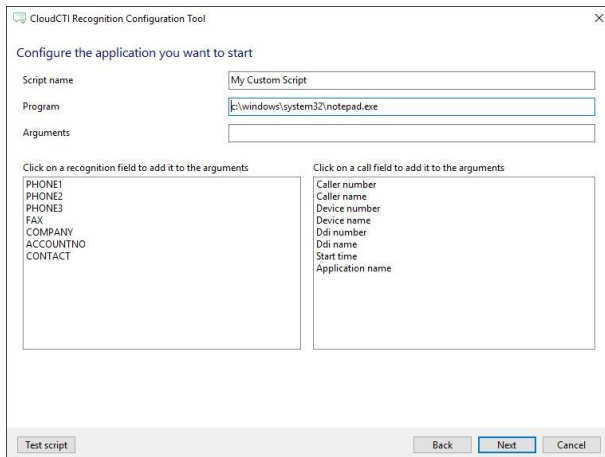
4.5.2 Start an application

Some applications (or add-ons for the application) support calling a command line prompt with a startup parameters to pop up a contact card. You can specify the full path to the executable and provide the argument to call. Then select a recognition field from the data source which contains the customer id to popup.

Example:

Program “application.exe” is provided by the CRM application and can be called with argument “/openaccount” to display the contact details based on a unique account id. The account id is provided by the column “ACCOUNTNO” from your data source. The popup will use the ACCOUNTNO value from the recognized calling customer.

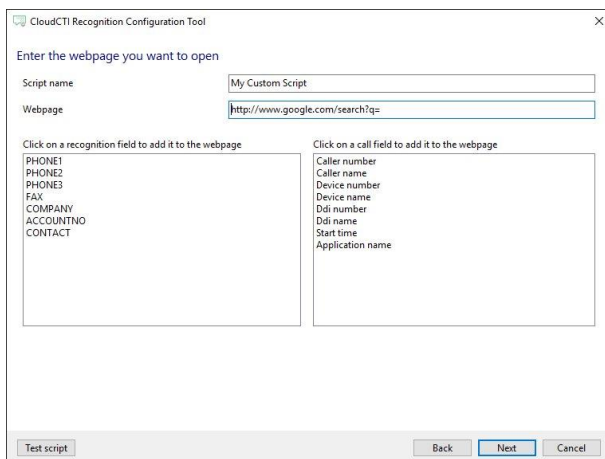
To test the command prompt, press the [Test script](#) link below. The test script uses data from the first record of your data source. It is possible to provide multiple arguments and fields.



Click **Next**. Now you can configure key strokes as described above.

4.5.3 Open a webpage

Some CRM applications can be opened via an URL to open the customer details or perform a search request. Therefore you must provide the URL to a specific view/action and the column from your data source which contains the value to perform the request.



Some applications register their own URL, which can also be used in the Wizard to perform a popup. For example Microsoft Dynamics Navision can be called using a "Navision:://" URL to open a specific form with customer data.

Once again, click **Test script** to test the URL and click **Next** to setup keystrokes.

4.6 Best practice on keystrokes

Tips for best practice for building a keystrokes script:

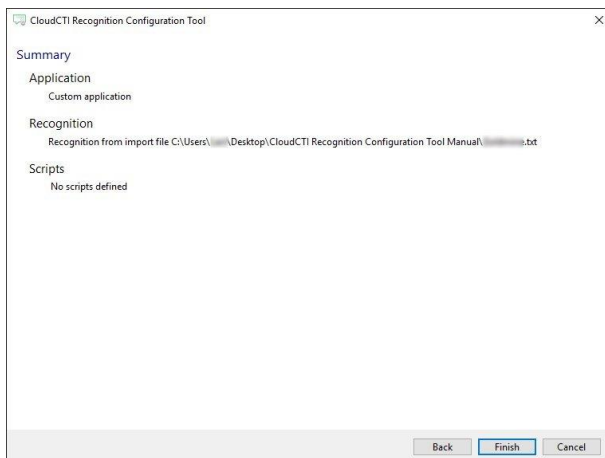
1. Start building your script with high pause times. Test each step in the execution of the script and monitor the performance of your CRM application. Once the script executes correct, you can lower the pause times for faster execution. Please note that your script will be used by

multiple users and therefore may run on multiple computers, so keep in mind that the performance of your CRM application may differ on each computer. Best is to preserve some delay time so the script is executed properly at any time.

2. Keep your script simple. Use built-in CRM application hotkeys and hotkey combinations to minimize the amount of keystrokes. Many applications have a hotkey combinations to open specific windows, for example perhaps you can perform a search request using CTRL+F. Also menu items can often be accessed via your keyboard using the ALT key. The ALT key displays a unique underlined character shortcut per menu item, allowing you to easily step through the menu by pressing the ALT followed by the underlined character sequence. Please refer to the CRM application documentation for more information on available hotkeys and keyboard shortcuts to simplify your script.
3. Perform a search based on a unique data source field. It is best practice to search for a customer ID rather than for example a customer name, after all a name doesn't have to be unique.
4. Make sure all users have the same configuration and access rights within the CRM application. All users must be able to execute the same script.

4.7 Finish the application setup

Now that recognition data replication and application pop-up has been configured, you can press **Finish** to submit your application setup.



After finishing the setup, you will return to the Recognition Configuration Tool. Meanwhile, the RUCS will start replicating your data.

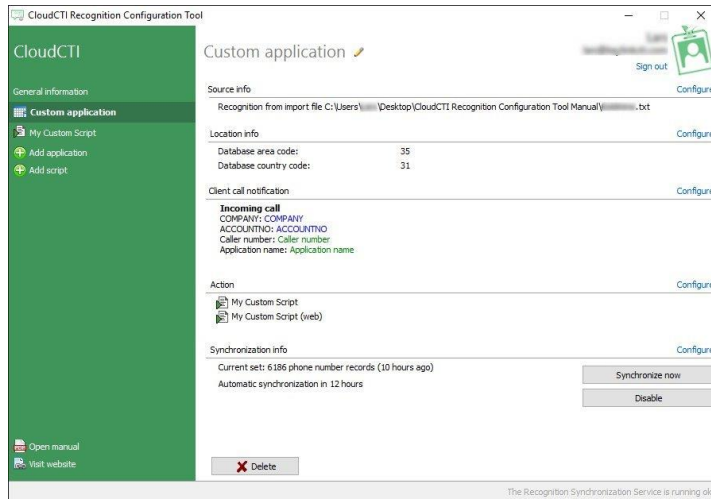
5 Recognition Tool overview

The main screen shows all your configured applications and scripts. Applications are used for recognized numbers only while scripts are used on any number, even those not recognized.

5.1 Disable an application

To disable an application:

- Select the application on the left side,
- click **Disable**.



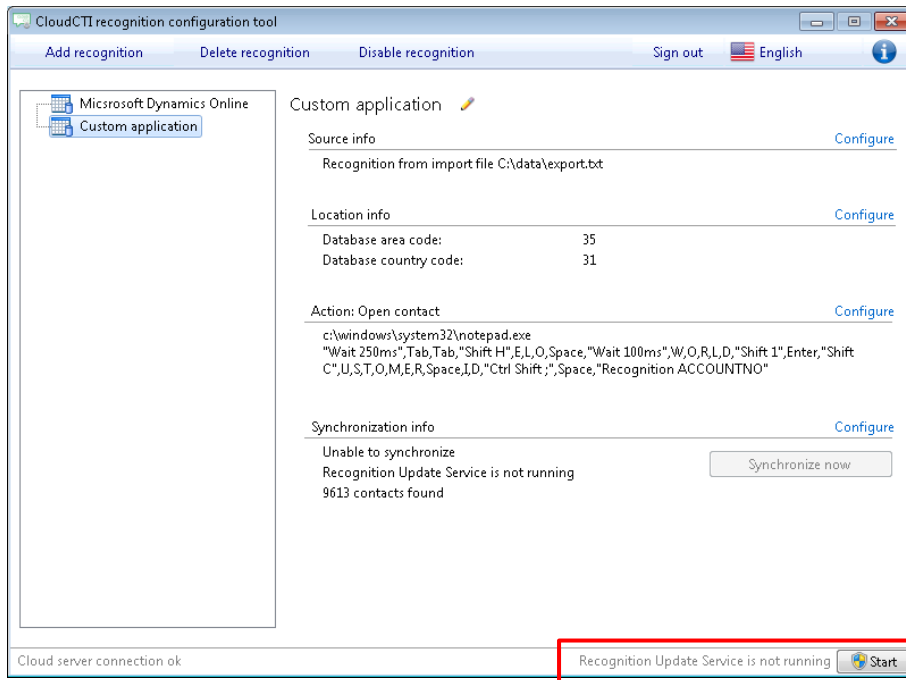
6 Frequently asked questions


1. Recognition Update Service is not running

The “Recognition Update Service” service is installed with the product during installation setup.

Solution

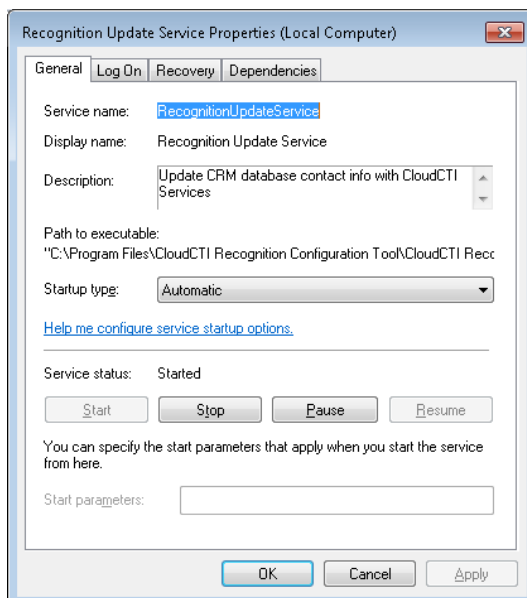
If the service is not automatically started, you will see a notification in the Recognition tool overview



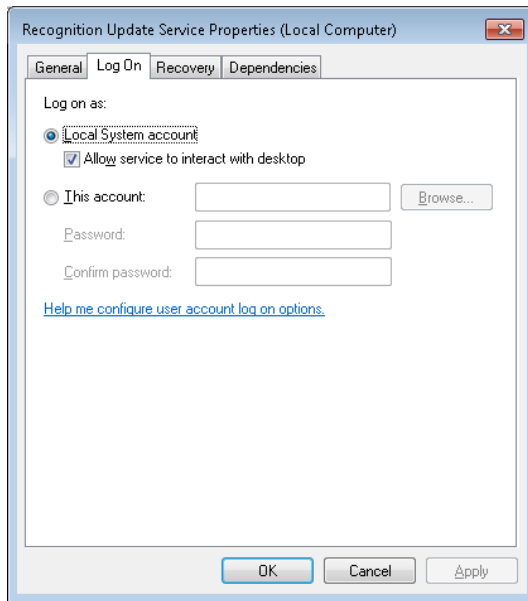
Press the  button to start the “Recognition Update Service”. This action requires elevated user rights

In case the solution above doesn't resolve the issue
Go to “Start > Run” enter “services.msc” and locate the “Recognition Update Service”

Please check if the service is set to automatic



Also check if the service is running as “Local System Account”



Restart the “Recognition Update Service” service.

2. Recognition Update Service is running (not logged on)

In case the Recognition Update Service has no connection with the cloud service, the Recognition Tool will display a status notification “Recognition Update Service is running (not logged on)”

Please check your internet connection and restart the Recognition Update Service.

Go to “Start > Run”, enter “services.msc” and locate the “Recognition Update Service” then stop and start the service.

3. The Application wizard does not show preview?

Some listed application skip the preview window if the replication data has a known and fixed data structure.

If you cannot continue the Wizard, abort the wizard. Please check your internet connection and restart the Recognition Update Service.

Go to “Start > Run”, enter “services.msc” and locate the “Recognition Update Service” then stop and start the service. Then try again.

4. My data is not updated?

Please check your internet connection and restart the Recognition Update Service.

Go to “Start > Run”, enter “services.msc” and locate the “Recognition Update Service” then stop and start the service.

5. [Some of my customers are not recognized?](#)

Check if data replication is completed successfully.

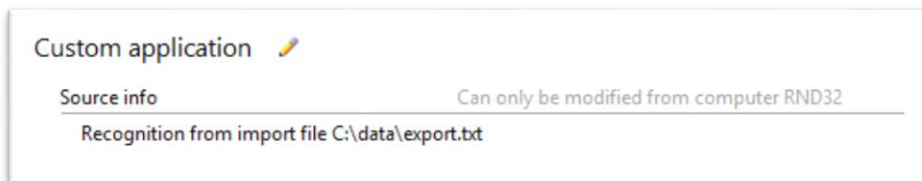
Please make sure your data source is up to date and contains complete information from all of your customers.

Remove your application and reconfigure the application via the Wizard. In case a data preview is shown, check if all phone number fields are set as “search field”

6. [I cannot change my application settings?](#)

Currently, you can only change application data source settings from the computer on which the data source was created. This is because the data source is sometimes only accessible from that location.

Example



7. [How can change my application popup?](#)

You can alter the pop up action by pressing the “Configure” link on the action panel



This will start up the application wizard to alter your action settings.

8. [Can I select which users can recognize from an application?](#)

No, this is not possible. Recognition is visible to all users from your tenant account. Optionally you can subscribe for an additional accounts per department/application users group.

9. [If I configure multiple applications, which data is recognized first?](#)

This question is pending