

How to configure caller recognition and screen-pop for:

CarIT

Supported versions: CarIT CRM

Contact replication method: CSV/Text export

Screen pop method: Commandline

Prerequisites

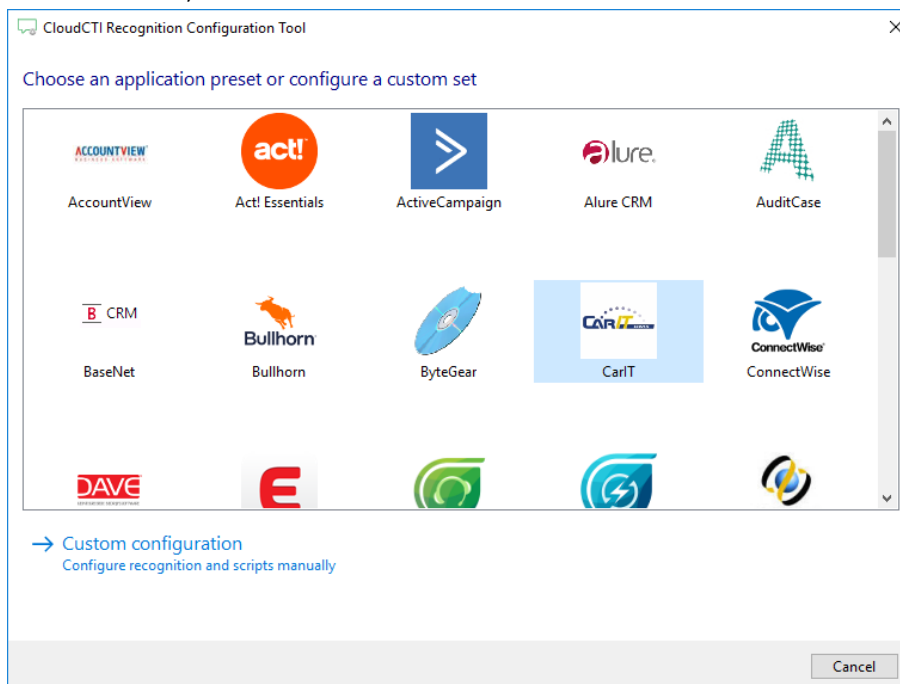
Using the SV-Tool supplied with CarIT, you can periodically schedule a CSV/Text export. The standard export “exportklantgegevens.csv” contains phone numbers with corresponding customer numbers. With the SV-Tool you can add additional customer fields to display in the notification. For support with creating the export file, you can contact your supplier.

Notes

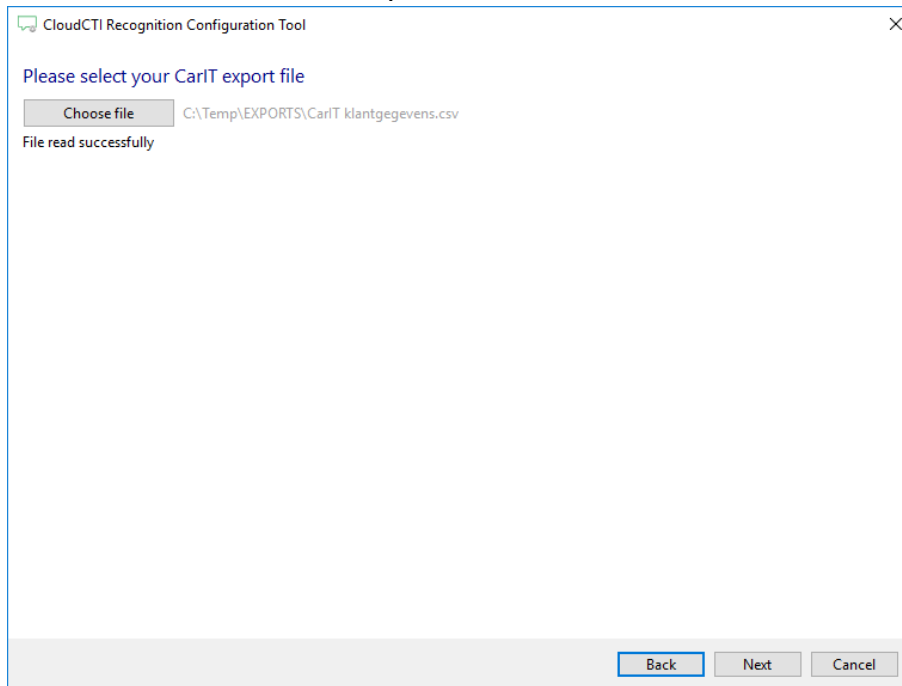
For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

Configuration steps

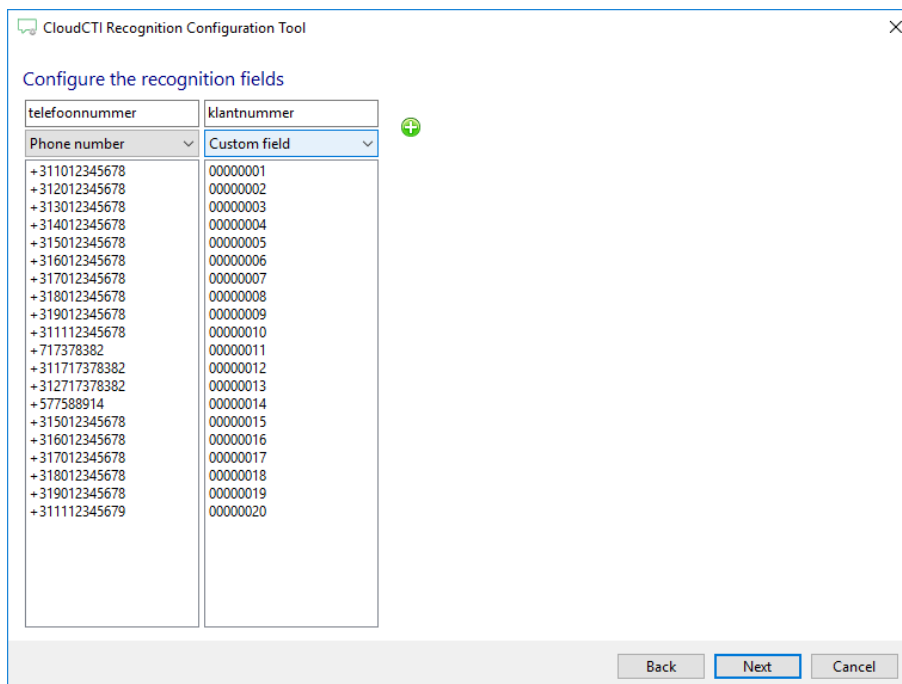
- 1) Start by clicking ‘add recognition’ in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose ‘CarIT’, as shown below.



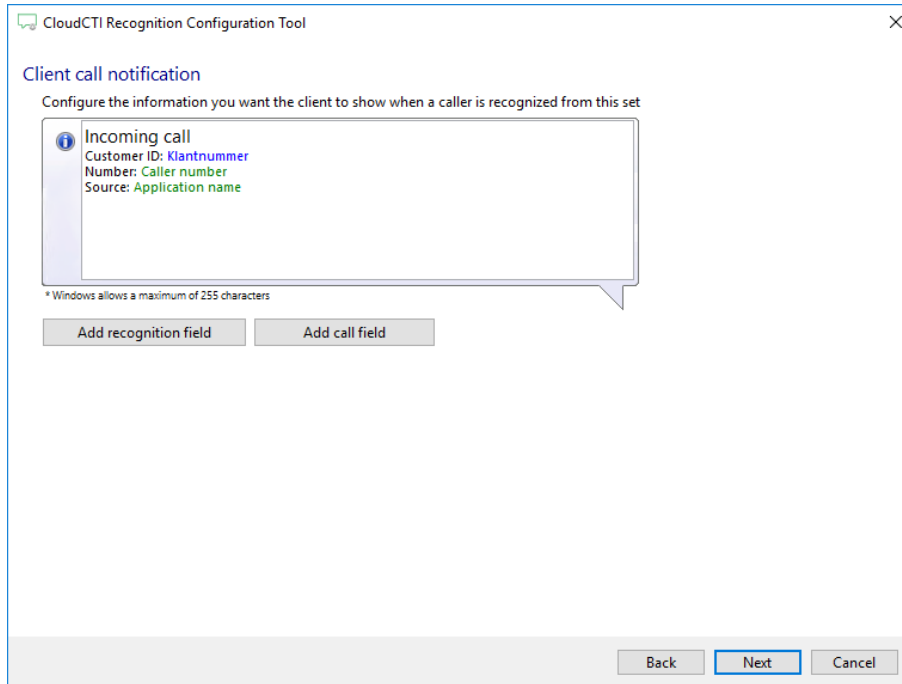
2) Select the CarIT CSV/Text export file.



3) The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue



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



CloudCTI Recognition Configuration Tool

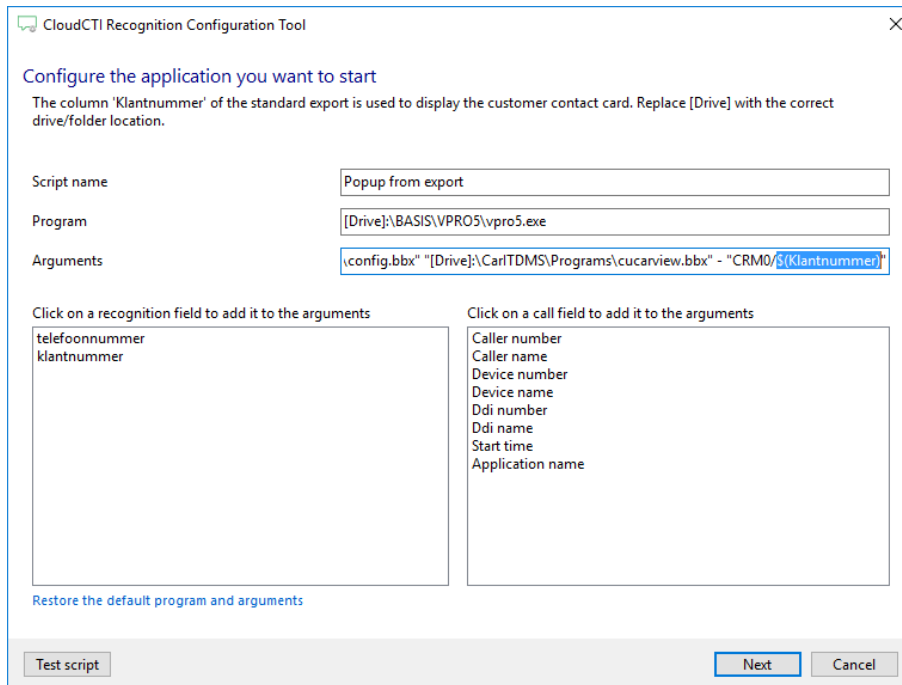
Client call notification

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

Incoming call
 Customer ID: **Klantnummer**
 Number: **Caller number**
 Source: **Application name**

* Windows allows a maximum of 255 characters

5) By default, the popup is configured to open the customer card based on the given customer number, set as “\$(Klantnummer)”. Change “[Drive]” to the correct drive and folder location.



CloudCTI Recognition Configuration Tool

Configure the application you want to start

The column 'Klantnummer' of the standard export is used to display the customer contact card. Replace [Drive] with the correct drive/folder location.

Script name:

Program:

Arguments:

Click on a recognition field to add it to the arguments

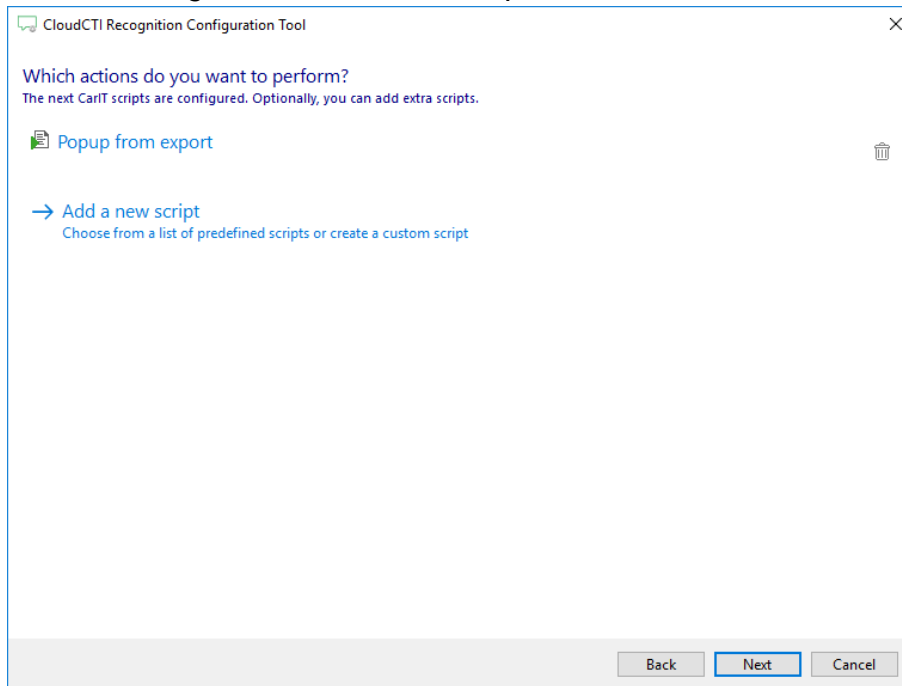
- telefoonnummer
- klantnummer

Click on a call field to add it to the arguments

- Caller number
- Caller name
- Device number
- Device name
- Ddi number
- Ddi name
- Start time
- Application name

[Restore the default program and arguments](#)

6) You can change or add additional scripts. Press 'Next' to continue.



7) Check the configuration summary and click finish to add the recognition from CarIT

