

How to configure caller recognition and screen-pop for:

Exact Synergy Enterprise

Supported versions: Synergy Enterprise
Contact replication method: Text / ODBC
Screen pop method: Uri link

Prerequisites

The Exact Synergy Enterprise integration can use either a CSV/Text import or an ODBC connection to the Microsoft SQL database in which your contact data is stored to recognize and popup calling customers.

Replication via ODBC requires. SQL Credentials with read access permission to the MS SQL database is therefore required. Please contact your Exact contact for more information on accessing your database.

If you opt for a CSV/Text import, you should determine a standard export layout containing at least a name, one-or-more phone numbers and a unique customer URL ID. (database field "cicmpy.cmp_wwn"), which can be used to show the customer details. Make sure the file is stored on the PC where the recognition tool is installed.

Minimum requirements to popup the contact card in your browser are provided by Exact: <http://www.exact.nl/support-en-training/support/online-hulp/systeemeisen/systeemeisen-exact-synergy>

Notes

Dial from Exact Synergy Enterprise is easy, just click on the phone icon next to a phonenumber to dial. The first time your browser may request your permission to associate 'callto:' uri links with MakeCall.exe. If no phone icon is present you can still select a phone number and dial with the client hotkey (PAUSE).

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HRM: Person - 1007, Olaf Taylor-Smulders

Created: [Annette Meijer](#) 30-11-2010 11:22

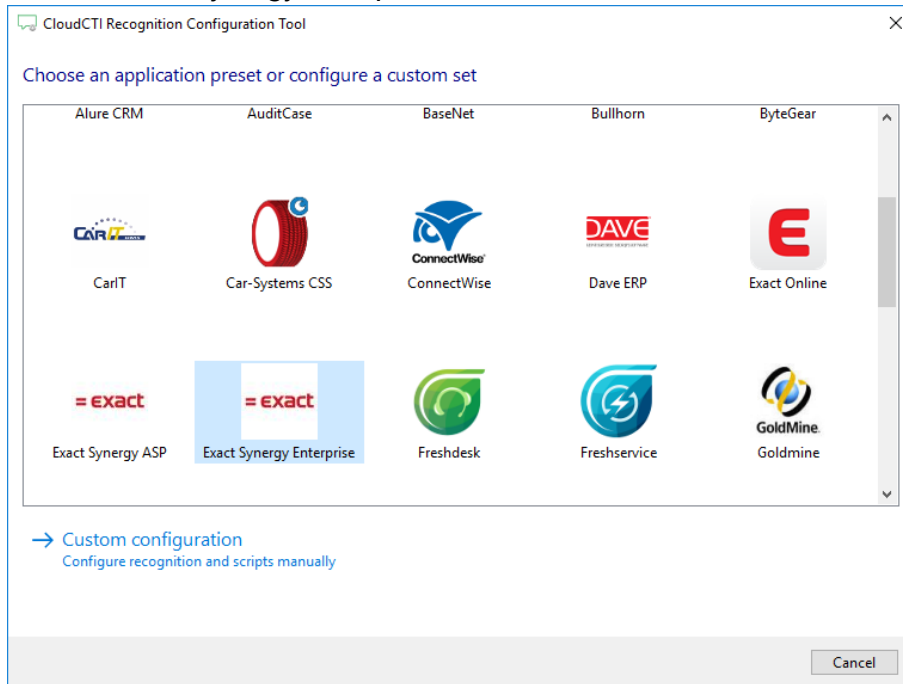
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General

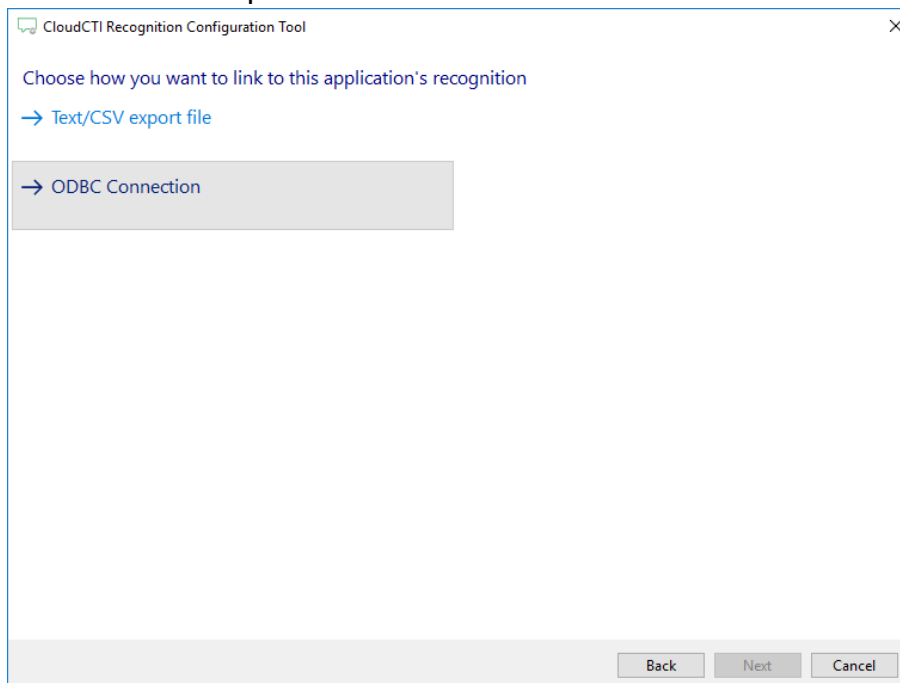
Name	Olaf Taylor-Smulders	
Job title	Sr. Account manager	
Office phone / Extension	+31 26 264 7000 	1007
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Contractual location	Main Office Maastricht - Netherlands	
Physical location / Room	Main Office Maastricht - Netherlands	5000
Competence profiles	No active profile	
Performance review profiles	01-01-2012	

Configuration steps

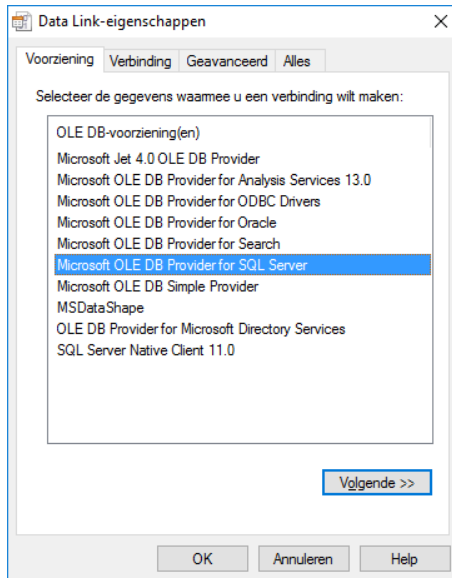
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Exact Synergy Enterprise', as shown below.



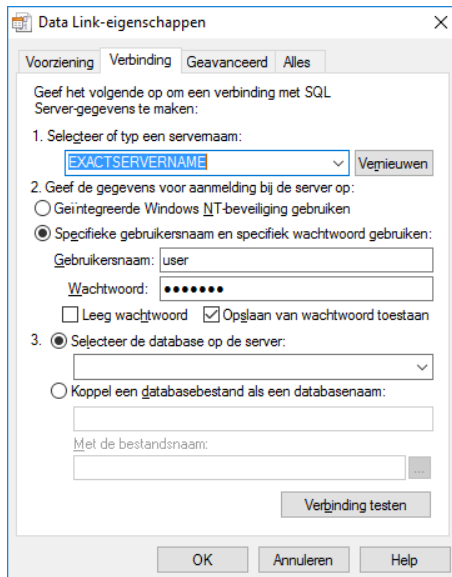
- 2) Next choose to import a CSV/Text file or use the ODBC. We will use the ODBC connection



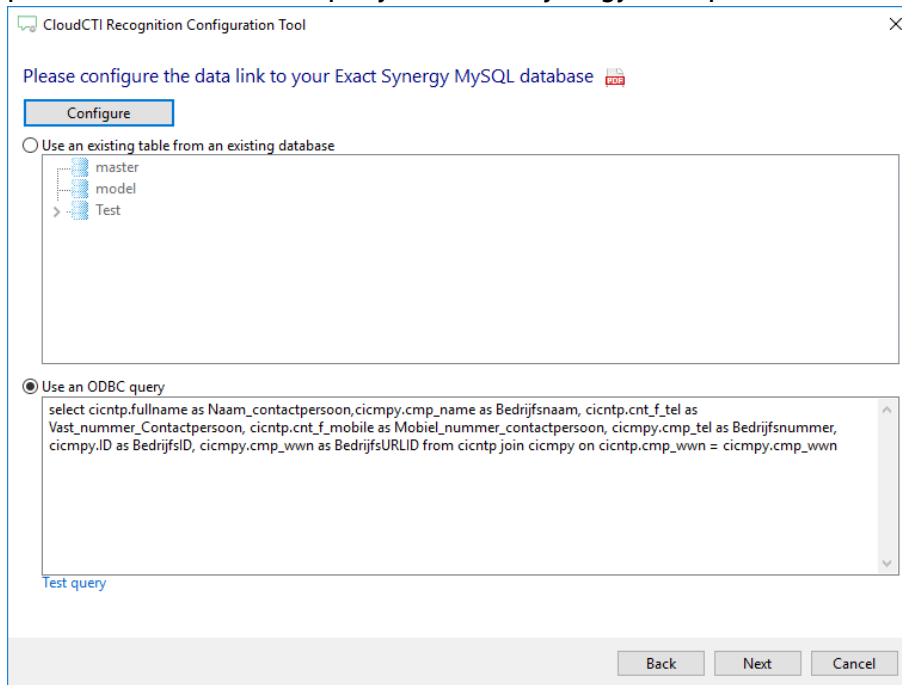
- 3) Press 'Configure' to open the Windows Data Link Properties dialog to configure your ODBC connection string. Select "Microsoft OLE DB Provider for SQL Server" and press the 'Next >>' button.



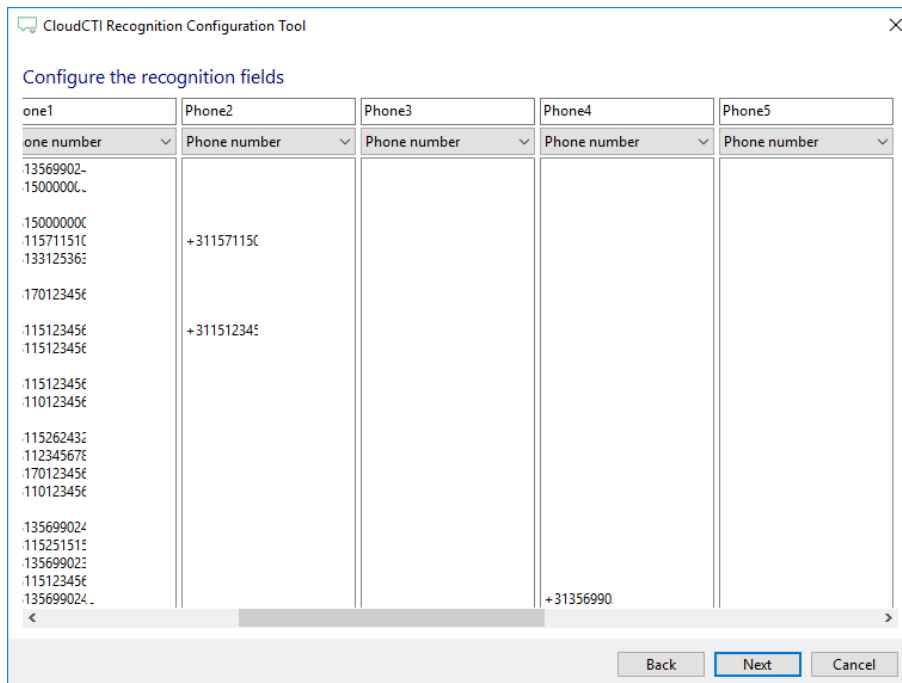
- 4) Select your Exact Microsoft SQL Database and enter read access level credentials. Check 'Allow saving password' to make automatic replication possible. Press the 'Test Connection' button to ensure the credentials are valid. Then press 'OK' to continue.



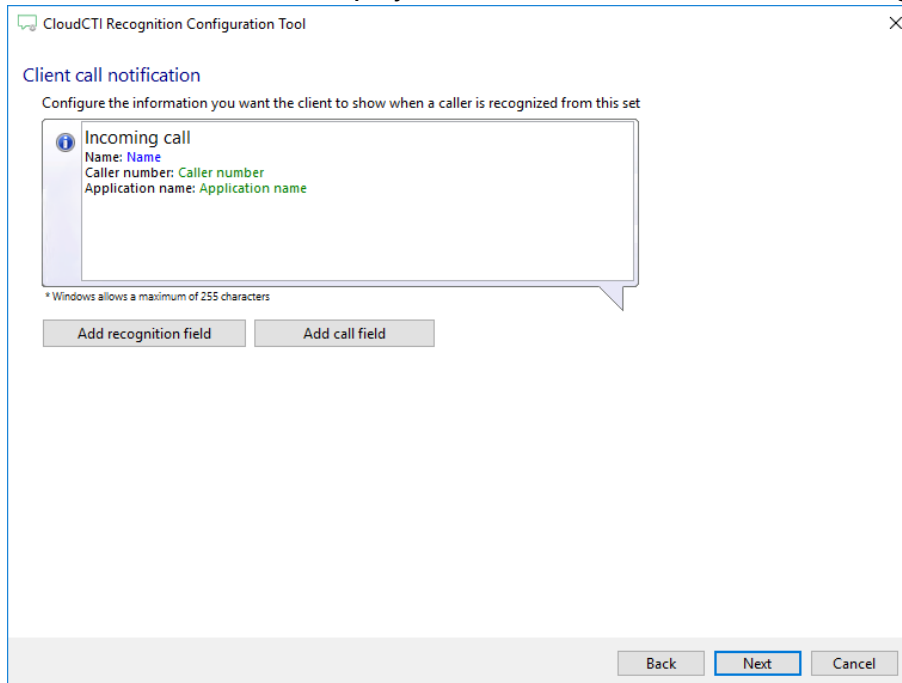
- 5) Once the ODBC connection is made, the wizard show available tables/views and a preformatted database query for Exact Synergy Enterprise.



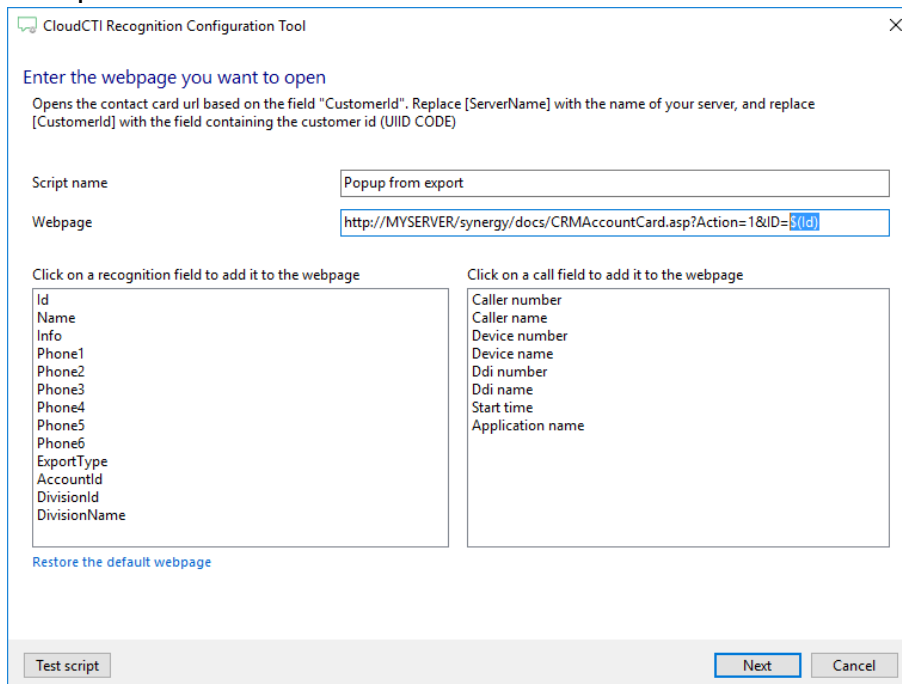
- 6) The CTI Wizard automatically detected phone number columns. The content of these columns will be indexed for matching the phone number of an incoming call. Click 'next' to continue.



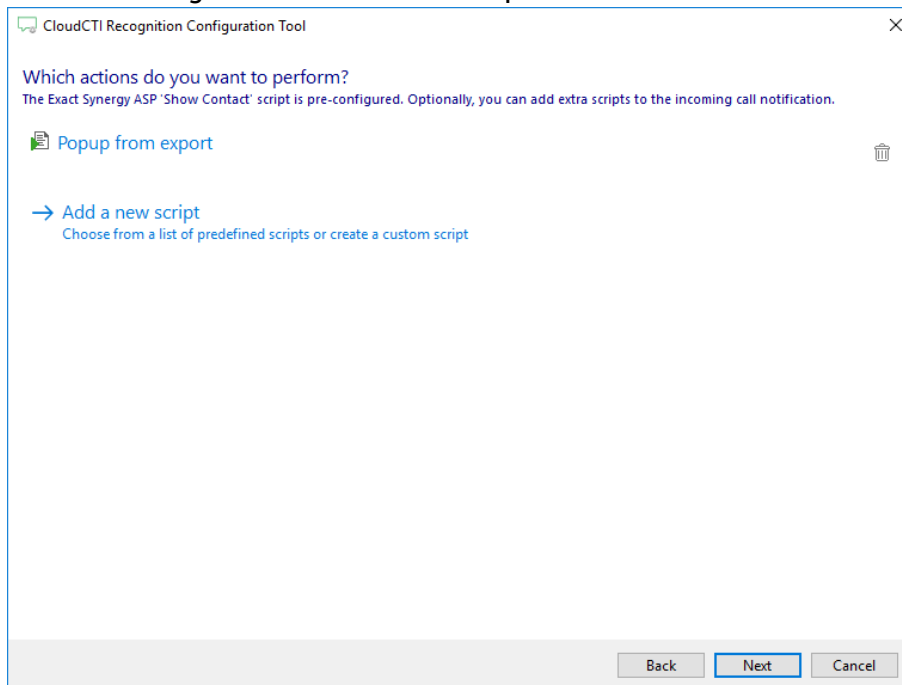
7) Choose which fields to display in the call notification on an incoming call.



8) Change [ServerName] to your Exact Synergy Server PC Name on users can log on to the webinterface. Set [CustomerId] to the recognition field containing the UUID Code from the account. Calling the URL will pop up the contact details within Exact Synergy Enterprise.



9) You can change or add additional scripts



10) Check the configuration summary and click 'Finish' to add the recognition from Exact Synergy Enterprise.

