

How to configure caller recognition and screen-pop for:

Microsoft Access 2013

Supported versions: Microsoft Access 2013 and newer

Contact replication method: Access ODBC driver

Screen pop method: COM/OLE

Prerequisites

The Recognition update tool replicates data from the Microsoft Access 2013 database via an ODBC driver. A screen pop is performed via COM/OLE.

Contact information from Access database can easily be replicated in a few steps using an ADO connection. By default Windows Vista to Windows 8.1 has ODBC drivers installed supporting older Microsoft Access databases (*.mdb). For all newer version of Microsoft Access database (*.accdb) you will need to install the Microsoft Access Database Engine 2010 Redistributable. Note: please install the 32-bit version! You can download this driver from the Microsoft site following this link:

<https://www.microsoft.com/en-in/download/details.aspx?id=13255>

Notes

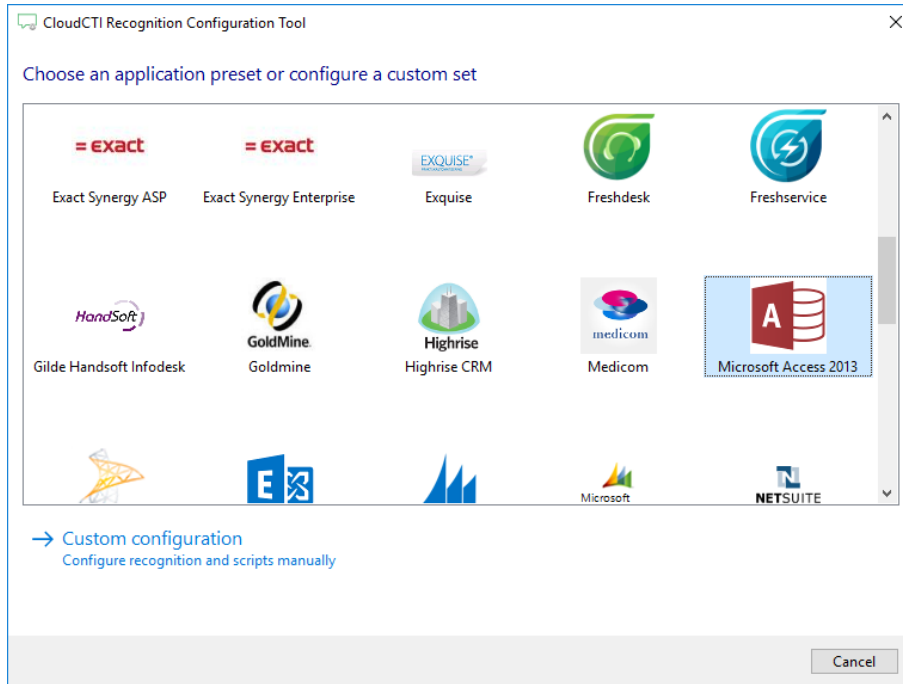
Dial from Microsoft Access 2013 via DDE is possible using visual basic scripting. You add a call button on your access form and use the next Visual Basic code:

Example sourcecode:

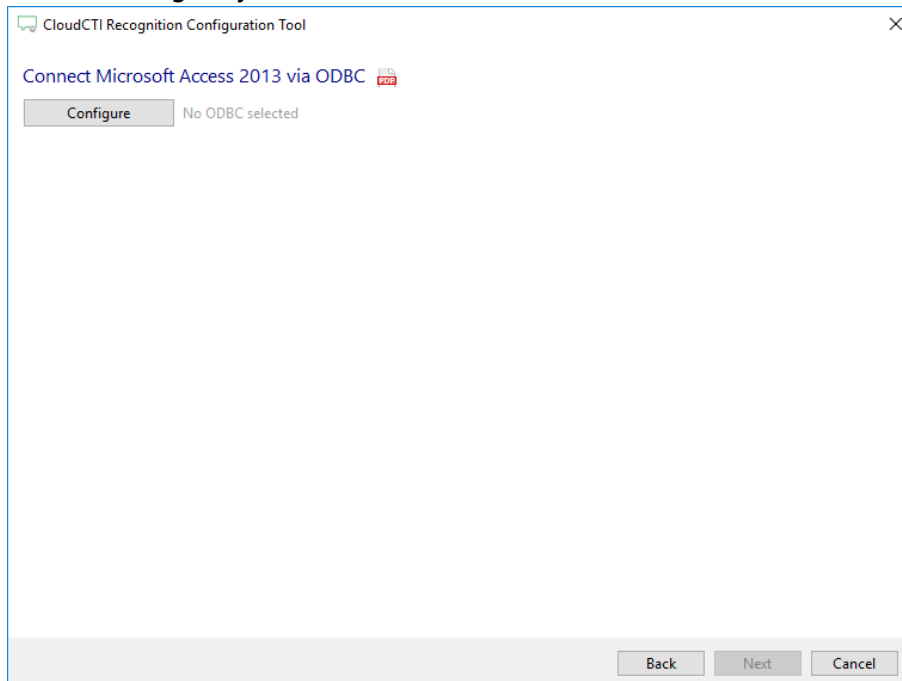
```
Private Sub Button_Click()  
On Error GoTo DDEError  
    Dim Channel As Long  
  
    'Poke DDE Message  
    Channel = DDEInitiate("CloudCTI", "Dial")  
    DDEPoke Channel, "DdeServerItem", "MakeCall,'+' & [PhoneNumberToDial] & ""  
  
Exit Sub  
  
DDEError:  
    MsgBox "Failed to execute", vbInformation + vbOKOnly  
    Exit Sub  
  
End Sub
```

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 'Microsoft Access 2013', as shown below.



- 2) Press "Configure your ODBC connection."



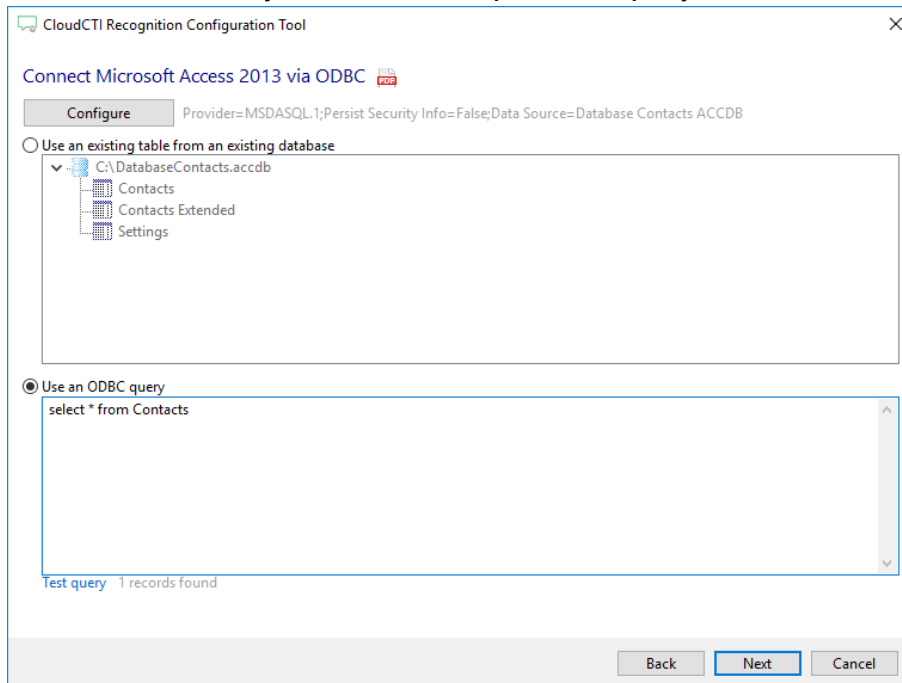
- 3) You can use the “Microsoft Office XX.X Access Database Engine OLE DB Provider” to connect to the Access database. Provide the data source full file path and user data. Press “OK” continue.

The screenshot shows the 'Data Link-eigenschappen' dialog box with the 'Verbinding' tab selected. The dialog is titled 'Data Link-eigenschappen' and has a close button (X) in the top right corner. It contains four tabs: 'Voorziening', 'Verbinding', 'Geavanceerd', and 'Alles'. The 'Verbinding' tab is active, and the text 'Geef het volgende op om een verbinding met deze gegevens te maken:' is displayed. Below this, there are three numbered steps:

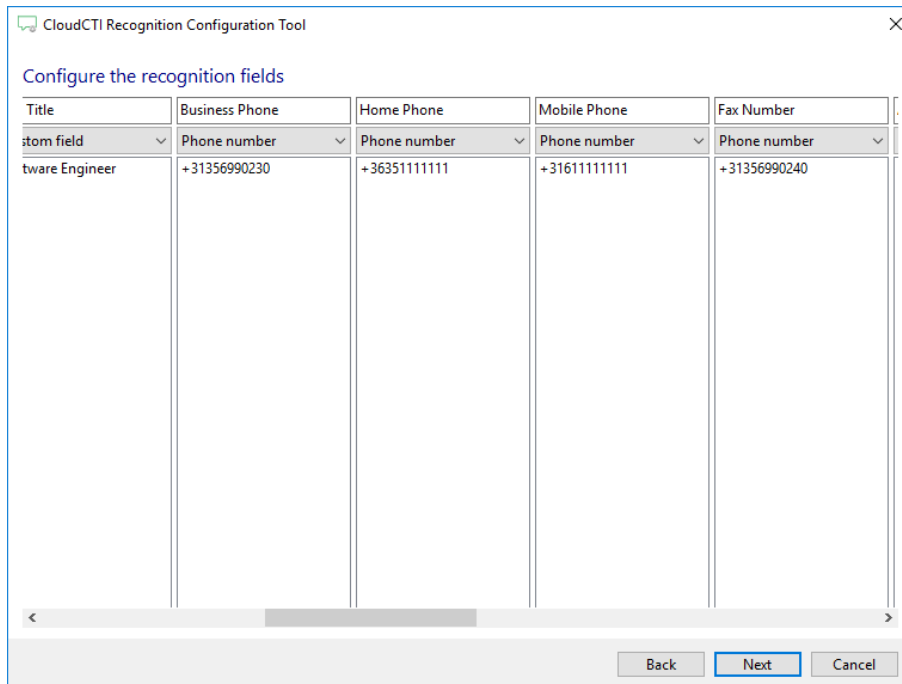
1. Geef de gegevensbron en/of locatie van de gegevens op:
Gegevensbron:
Locatie:
2. Geef de gegevens voor aanmelding bij de server op:
 Geïntegreerde Windows NT-beveiliging gebruiken
 Specifieke gebruikersnaam en specifiek wachtwoord gebruiken:
Gebruikersnaam:
Wachtwoord:
 Leeg wachtwoord Opslaan van wachtwoord toestaan
3. Geef de catalogus op die aanvankelijk moet worden gebruikt:

At the bottom of the dialog, there is a 'Verbinding testen' button, and at the very bottom, there are three buttons: 'OK', 'Annuleren', and 'Help'.

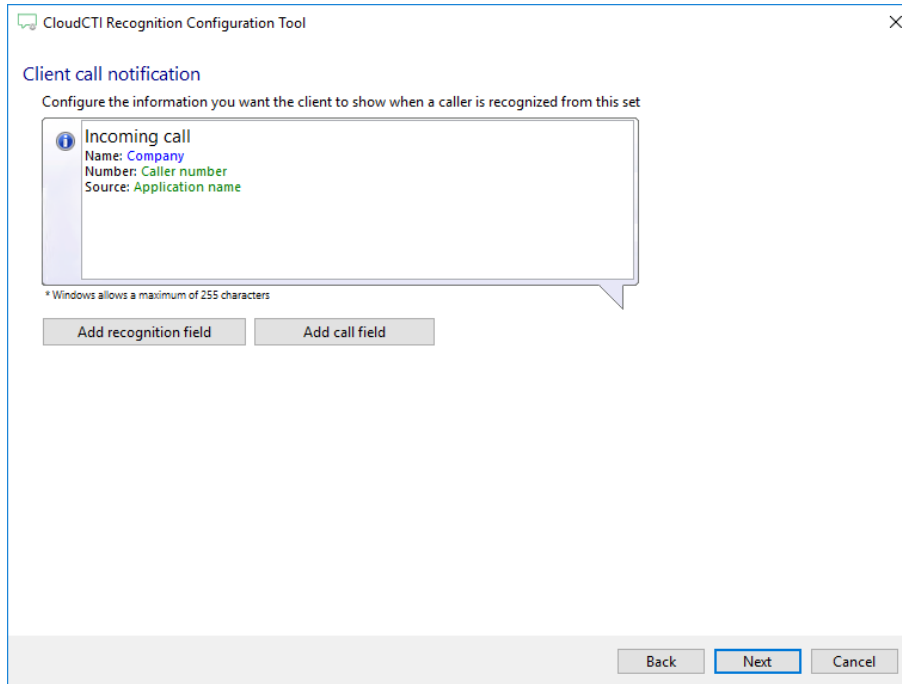
4) Select a table from your database or provide a query



5) 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

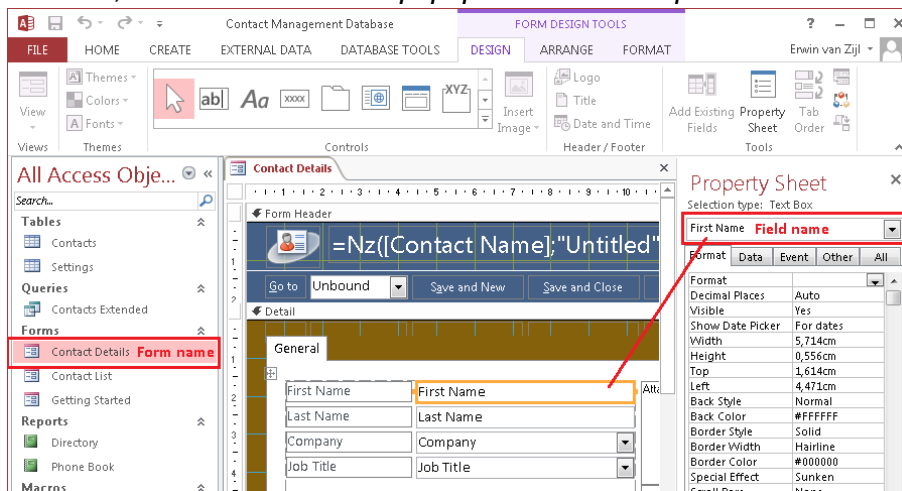


6) Choose which fields to display in the call notification on an incoming call.



7) To enable screenpop for recognized callers, please provide a form name to display, a field name on which a "FindRecord" request will be executed to search for a specific record, based on the Identifier column from your recognition data.

Example screenshot: In the example below the script will search by First Name. However, it is recommended to popup based on a unique customer ID.



CloudCTI Recognition Configuration Tool

Provide the script name the required parameters

Script name

Parameters

AccessCaption

FormName

ControlName



Identifier

8) You can add additional scripts. Please 'Next' to continue.

CloudCTI Recognition Configuration Tool

Which actions do you want to perform?

The Microsoft Access 2013 'Show Contact' script is default and needs to be configured. Optionally, you can add extra scripts to the incoming call

 **Open Microsoft Access 2013 form** 

Opens a form in a running Microsoft Access 2013 application and searches for a record in provided Control, based on the retrieved contact information

→ **Add a new script**
Choose from a list of predefined scripts or create a custom script

- 9) Check the configuration summary and click finish to add the recognition from Microsoft Access.

