

How to configure caller recognition and screen-pop for:

Notarisdossier

Contact replication method: None

Screen pop method: Notarisdossier API

Notes

With the Notarisdossier API no 'pop up' screen is automatically triggered within Notarisdossier, but the call will be registered with the timestamp, caller number, called number and - if matched to a contact – the name of the caller. The name of a matched caller can be clicked to directly for more info and to show their record.

Click the phone icon in the top ribbon to show the call list such as in in the screenshot below.

The screenshot shows the Notarisdossier web application interface. The top navigation bar includes 'Start', 'Cliënten', 'Dossiers', 'Objecten', 'Tijdschrijven', 'Offertes', and a phone icon highlighted with a red box. Below the navigation bar, a modal window titled 'Inkomende gesprekken' (Incoming calls) is displayed, showing a list of calls with columns for 'Tijdstip' (Time), 'Telefoonnummer' (Phone number), and 'Client' (Client). The background interface shows various dashboard tiles like 'Recherches', 'Takenlijst', 'CDR', and 'Doc-Direkt'.

Tijdstip	Telefoonnummer	Client
21:44	0123456789	Hooijer & ZN
16:31	06 2240 1150	C. Vlag
16:29	06 2240 1150	C. Vlag

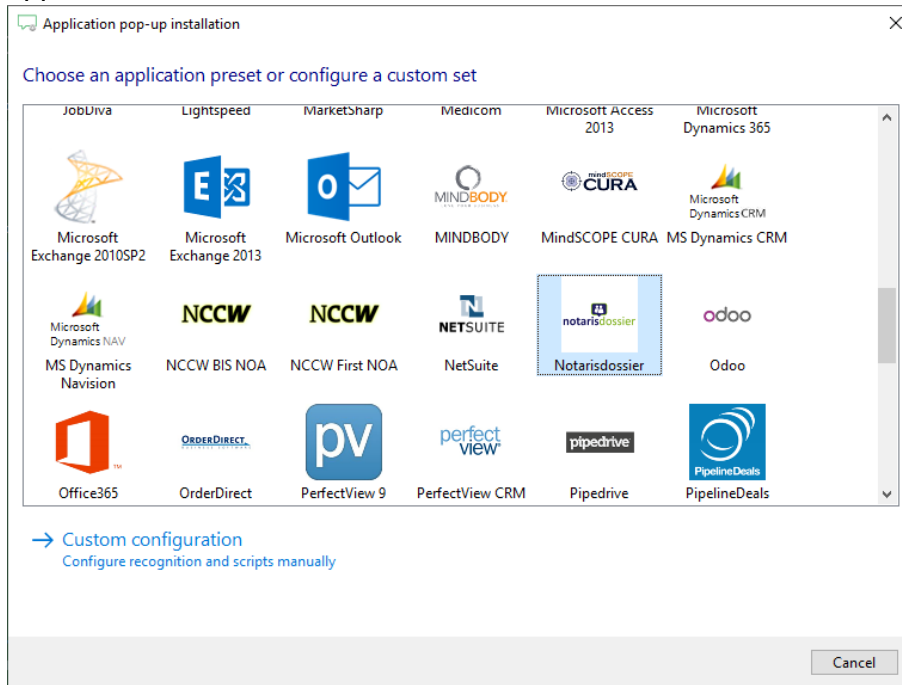
Prerequisites

For the API you will need to know your 'cluster' i.e. the first part of the URL in your browser. In the screenshot that is 'testomgeving' in <https://testomgeving.notarisdossier.nl>. Furthermore, you need your 'officeid'. That will be a string of the form xxxxxxxx-xxxx-xxxx-xxx-xxxxxxxxxxxxx.

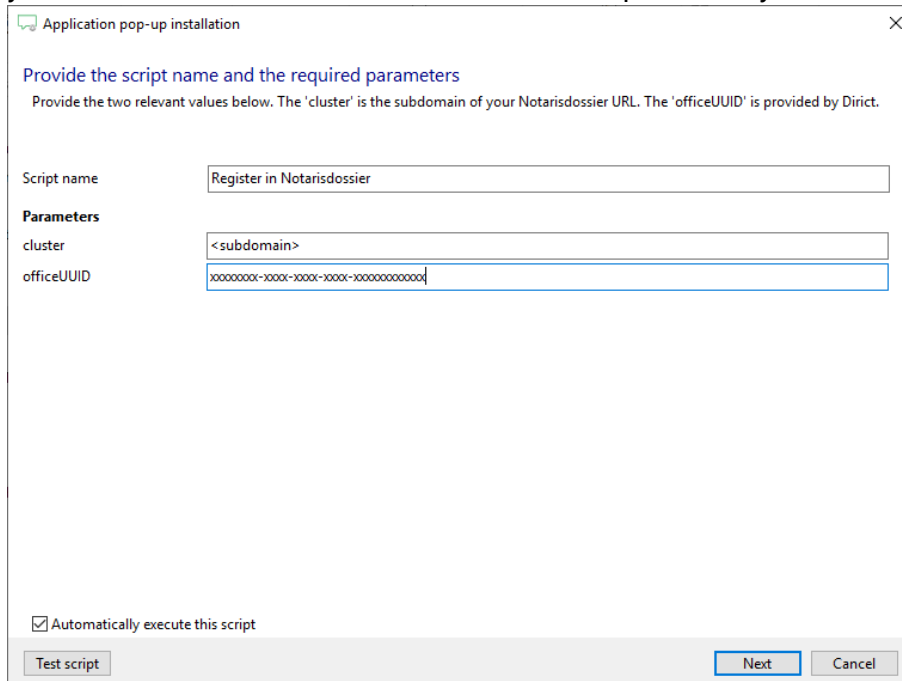
Click-to-dial can be enabled by configuring the outbound call link as `tel://<number>`

Configuration steps

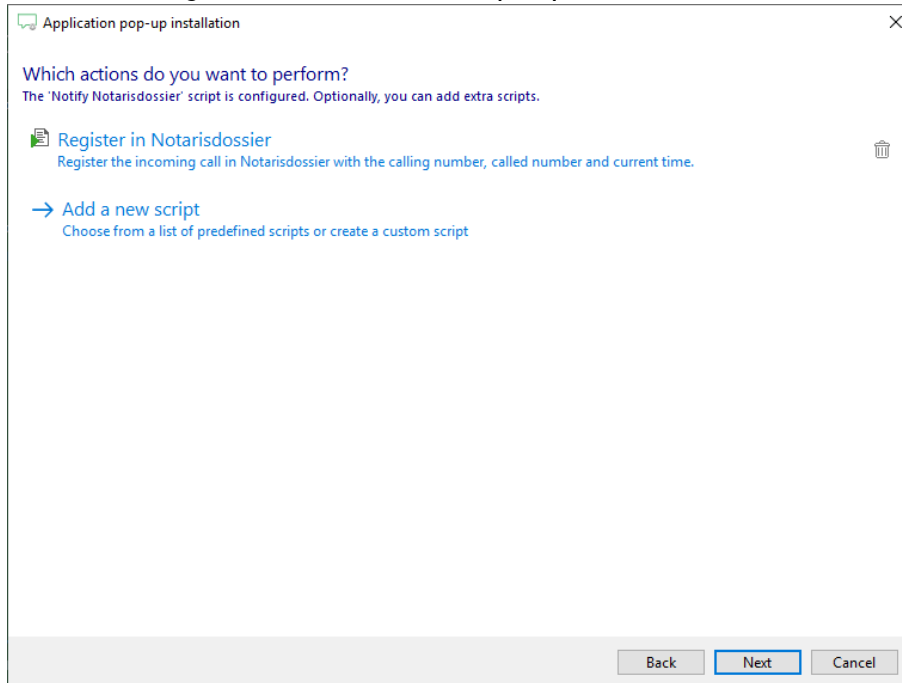
- 1) Start by clicking 'add recognition' in the Recognition Configuration Tool. From the list of applications, choose 'Notarisdossier', as shown below.



- 2) Provide the appropriate values for the script parameters. The 'cluster' is the first part of your Notarisdossier URL and the Office UUID is provided by Dirict.



- 3) You can change or add additional scripts, press 'Next' to continue.



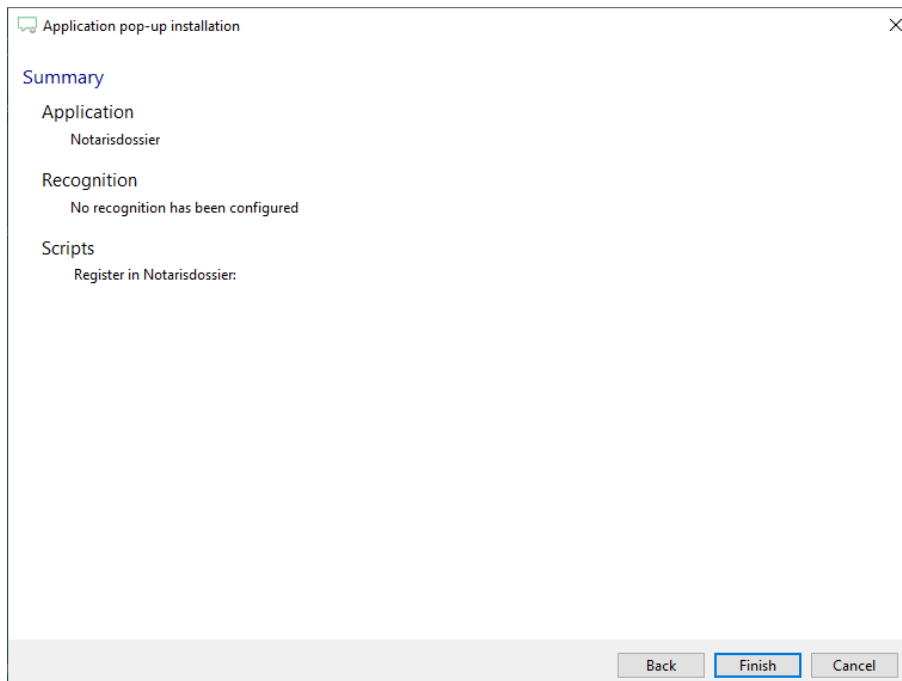
Application pop-up installation

Which actions do you want to perform?
The 'Notify Notarisdossier' script is configured. Optionally, you can add extra scripts.

- Register in Notarisdossier
Register the incoming call in Notarisdossier with the calling number, called number and current time.
- Add a new script
Choose from a list of predefined scripts or create a custom script

Back Next Cancel

- 4) Check the configuration summary and click 'Finish' to add the integration with Notarisdossier.



Application pop-up installation

Summary

- Application
Notarisdossier
- Recognition
No recognition has been configured
- Scripts
Register in Notarisdossier:

Back Finish Cancel