

How to configure caller recognition and screen-pop for:

Odoo

Supported versions: Odoo

Contact replication method: API over XML RPC

Screen pop method: URI

Prerequisites

The Odoo API is used for contact data replication. To enable this, the Recognition Update service must be authorized to access Odoo by using your username and password.

▲ Warning

For Odoo Online instances (<domain>.odoo.com), users are created without a *local* password (as a person you are logged in via the Odoo Online authentication system, not by the instance itself). To use XML-RPC on Odoo Online instances, you will need to set a password on the user account you want to use:

- Log in your instance with an administrator account
- Go to **Settings** • **Users** • **Users**
- Click on the user you want to use for XML-RPC access
- Click the Change Password button
- Set a New Password value then click Change Password.

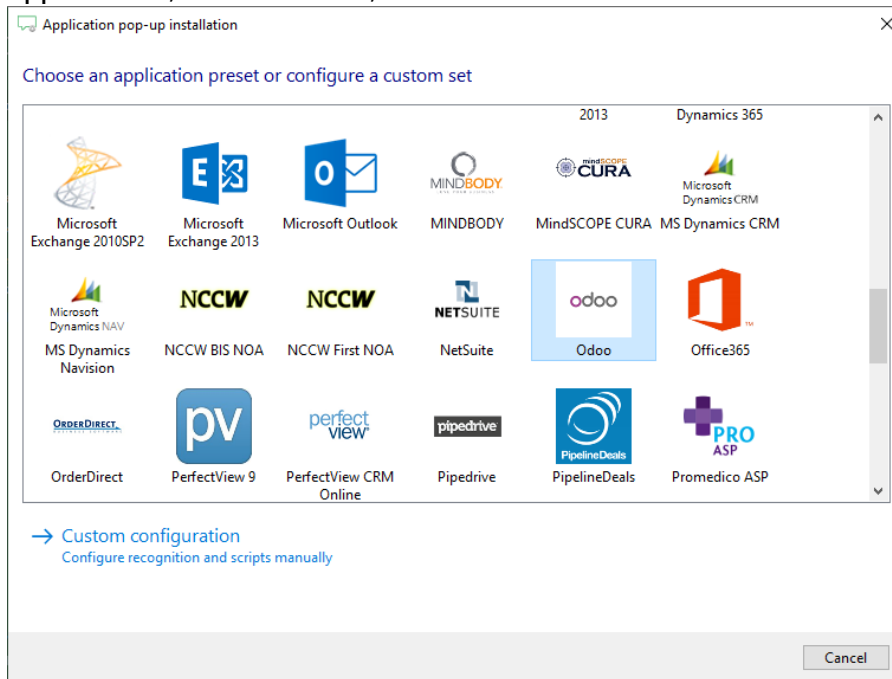
The *server url* is the instance's domain (e.g. <https://mycompany.odoo.com>), the *database name* is the name of the instance (e.g. *mycompany*). The *username* is the configured user's login as shown by the *Change Password* screen.

Notes

Dial from Odoo by selecting any phone number and pressing the hotkey (PAUSE).

Configuration steps

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



- 2) Enter your Odoo server URL, database name, username and password. Click "Next".

The screenshot shows the same "Application pop-up installation" window, but now it is in the "Please enter your Odoo details" step. The title bar and close button remain. The main area contains a form with four input fields: "URL" (containing "https://demo.odoo.com"), "Database" (containing "demo"), "User" (containing "admin"), and "Password" (containing four dots). At the bottom of the window, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

3) A selection of found records is shown. Verify these records, select the correct column types and enter an appropriate name for the column fields. This is relevant for step 4.

- Please don't alter the recognition fields 'PopUpUri' and 'Identifier', as they are required for the preconfigured action in step 5.

After verifying and/or altering recognition fields click "Next" to continue.

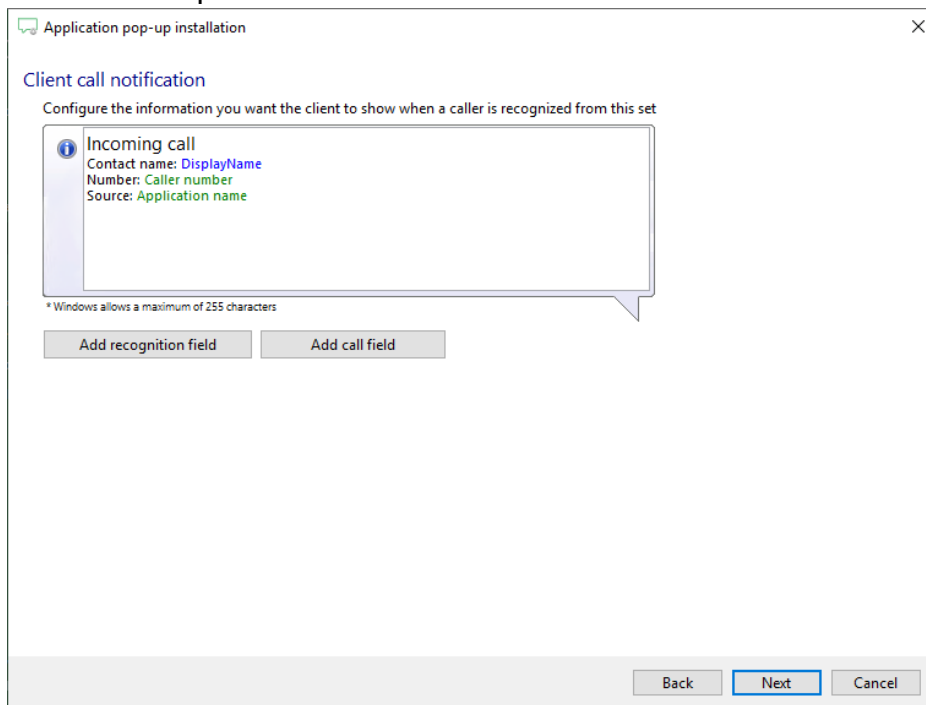
Application pop-up installation

Configure the recognition fields

Identifier	DisplayName	PhoneNumber	Mobile	PopUpUri
Custom field	Name	Phone number	Phone number	URI
11	Ahmad Plant		+31698798798	https://boer32.odoo.cor
13	Alexandru Molina	+31612312312	+313512312312	https://boer32.odoo.cor
3	Rian Avery	+31123456789		https://boer32.odoo.cor
8	Rian Avery, Test	+31123456789		https://boer32.odoo.cor
9	H.E.A.D.		+31612332112	https://boer32.odoo.cor
1	Parker Associates			https://boer32.odoo.cor
12	The Great Cater	+31612312312		https://boer32.odoo.cor

Back Next Cancel

- 4) Choose which recognition fields to display in the call notification on an incoming call. Make use of the recognition fields created and/or altered in step 3 to create a notification or use the template as shown below. Click "Next" to continue.



Application pop-up installation

Client call notification

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

Incoming call

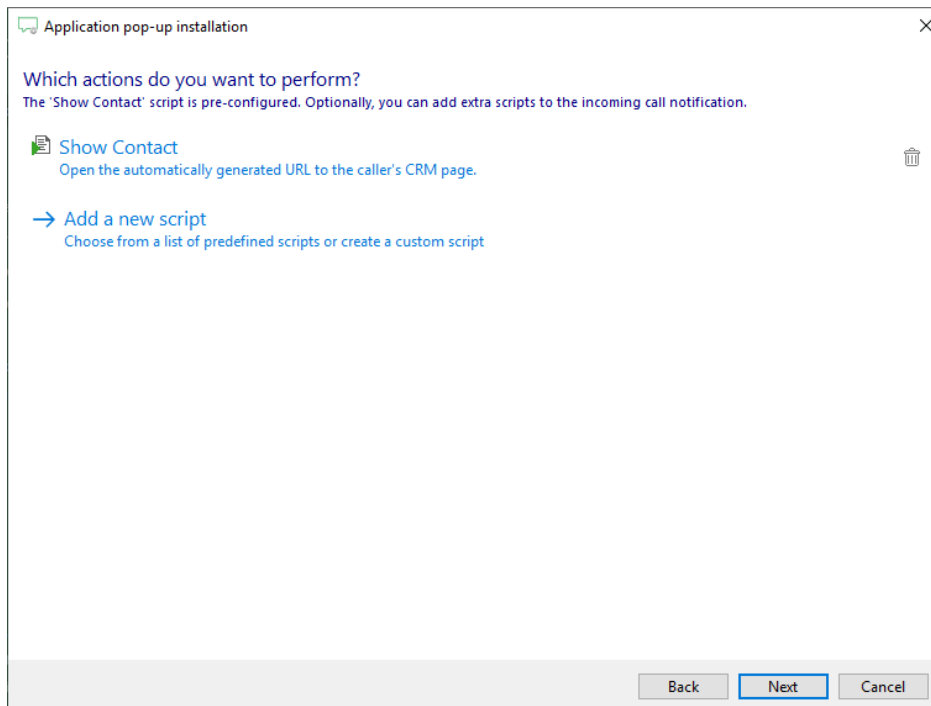
Contact name: DisplayName

Number: Caller number

Source: Application name

* Windows allows a maximum of 255 characters



- 5) The 'Show Contact' script is automatically configured. You can add more scripts or click 'Next' to continue.



Application pop-up installation

Which actions do you want to perform?

The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.

 **Show Contact** 

Open the automatically generated URL to the caller's CRM page.

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

6) Check the configuration summary and click finish to add the recognition from Odoo.

