

How to configure caller recognition and screen-pop for:

Syntess Atrium Professional

Supported versions: 4.3

Contact replication method: TXT/CSV

Screen pop method: Keystrokes

Prerequisites

Caller recognition and pop-up require a TXT/CSV export containing customer data from Syntess Atrium Professional. Atrium supports many flexible methods to create export files. The help documentation (available by pressing F1) describes general approaches using the reporting tool. For example, if you start the reporting tool via 'Stamgegevens/Relaties/Relaties' with CTRL-P, you can choose your .csv as output format.

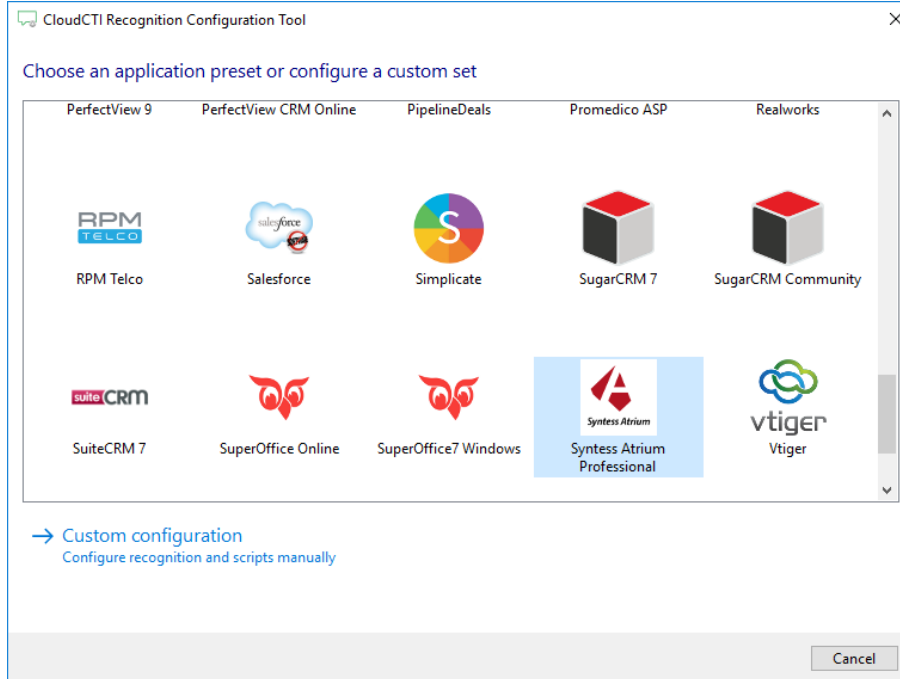
Any exported field can be shown in the preview notification of an incoming call. Naturally, the telephone numbers that should be recognized should be included in the export, as should the relation codes which are used by the screen-pop script. All phone number formats are supported. They will be normalized when synchronized by the Recognition Update Service.

Notes

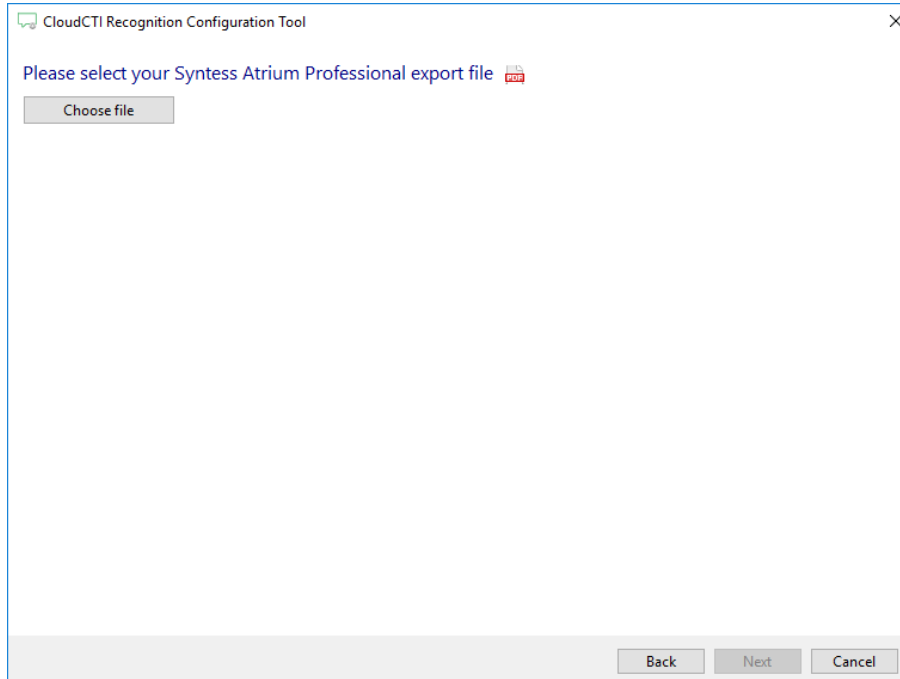
For outbound dialing, select a phone number and use the dial hotkey.

Configuration steps

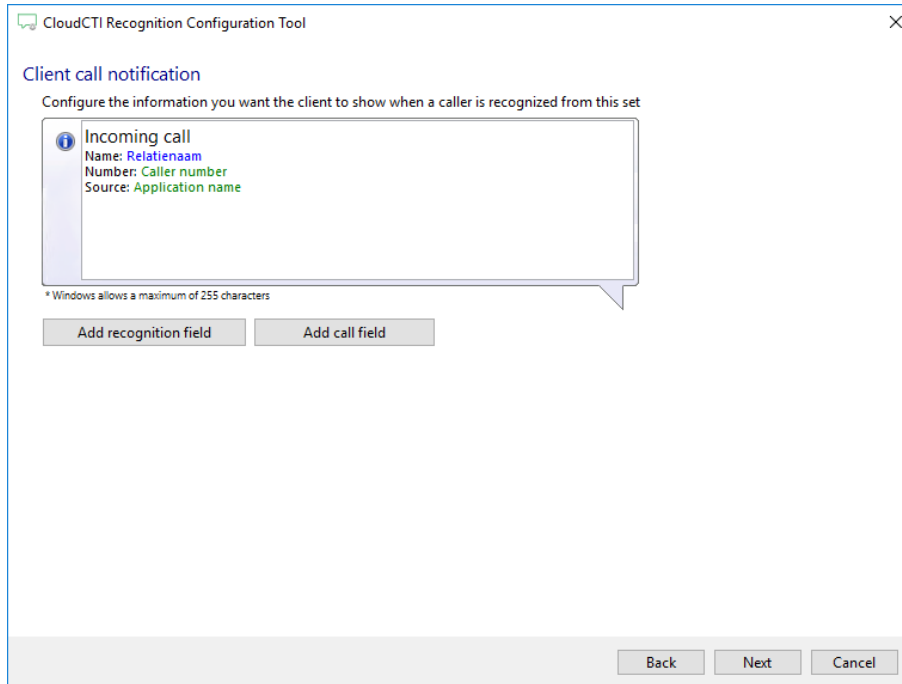
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Syntess Atrium Professional', as shown below.



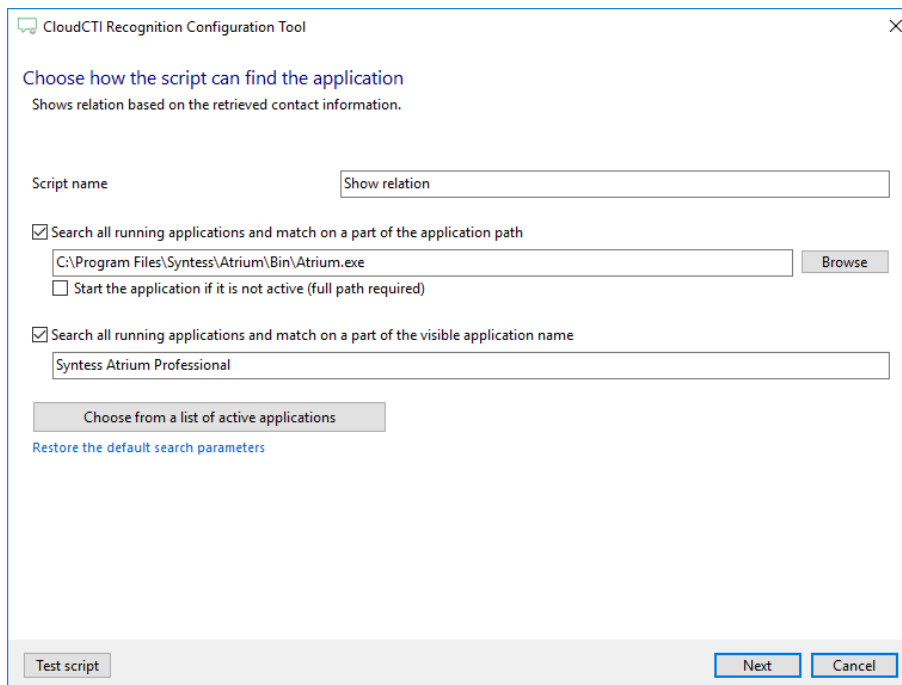
- 2) Select the CSV export file which contains the customer data and press Next



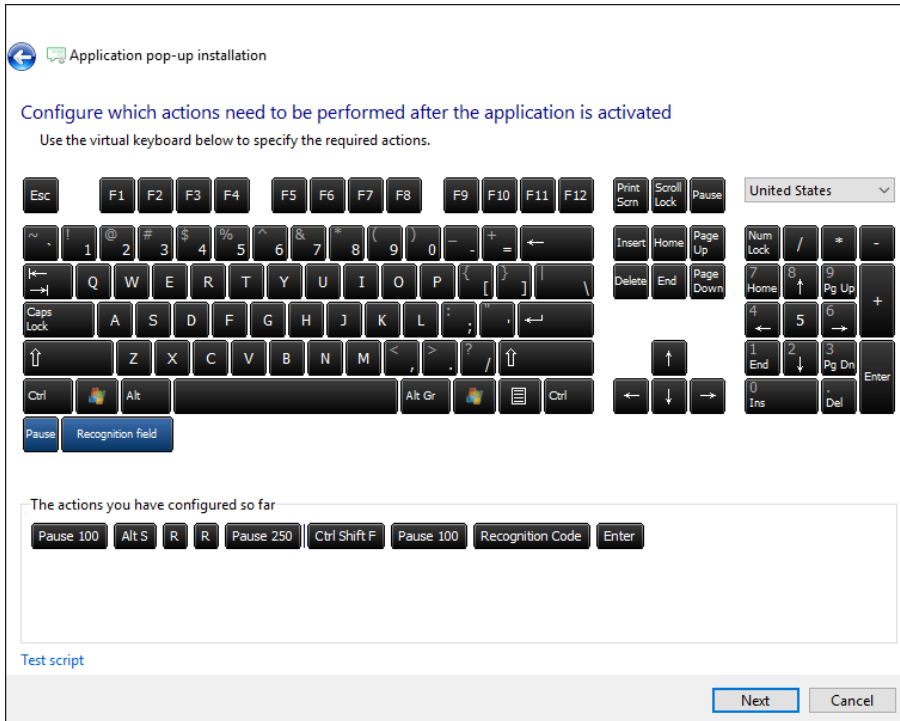
3) Choose which fields to display in the call notification on an incoming call.



4) By default, the popup is configured to open the "Syntess Atrium Professional window. Check if the file location is correct.



- 5) The script automates user actions to perform a search using the relation code. Test the script using the “Test script” link at the bottom-left.



- 6) Check the configuration summary and click finish to add the recognition from Syntess Atrium Professional

