



System Requirements

Before installation, please make sure your system meets the requirements for the Configuration Tool according to the table below:

Component	Recognition Configuration Tool Requirements
Computer and Processor	1GHz or faster x86- or x64-bit processor
Memory (RAM)	512 MB of system memory
Hard Disk	50 MB of hard disk space
Display	800 x 600 resolution or higher monitor
Operating System	Windows 7 (32-bit or 64-bit) or later
Network	Internet access capability, outgoing connection to port 80 and 443
.NET version	Some proprietary CRM (Customer Relationship Management) replication APIs (Application Programmable Interfaces) (e.g., Salesforce, MS CRM Online) require .NET framework 4.5.
Additional Requirements and Considerations	The Recognition Update Service will be installed. To regularly synchronize all contact info this must be kept running in the background.

Additionally, the use of the CRM Integrator Configuration Tool requires valid user credentials with the 'recognition configuration privilege'. The application integration is configured for the whole organization and this privilege prevents unauthorized users from accidentally modifying or clearing organization wide shared settings.

Product Features

- Recognition can be synchronized from the following data sources:
 - Any ADO supported data source. These are configured by setting up an ODBC connection string.
 - Text files (e.g., *.txt or *.csv files). Any string format, separator, text qualifier and end-of-line standard is supported and automatically detected.
 - Excel binary files.
 - A continuously expanding list of data sources with proprietary API's (such as MS CRM Online, Zendesk, Zoho, etc.).
- Phone number normalization
 - All Phone numbers from data sources are normalized based on the configured country code. Optionally, the area code can be added to incomplete numbers.
- Recognition and Screenpop
 - Screen pop scripts can be configured using one of the following methods:

- Open a URL – a link to the caller’s page is opened using the default browser.
 - Run an executable with parameters – the client starts an executable that is part of the installation of the CRM application. This executable is not part of the CloudCTI installation.
 - Emulate keystrokes – a specific window can be brought to the foreground, given keyboard focus and keystrokes sent to the application.
 - Use a proprietary API – binaries with CRM specific instructions can be used to activate the caller’s info (e.g., Outlook’s COM interface). These binaries are not part of the CloudCTI Client Installation but are downloaded (to %localappdata%\CloudCTI\scripts) or updated on the fly.
- Supported languages: English, Dutch

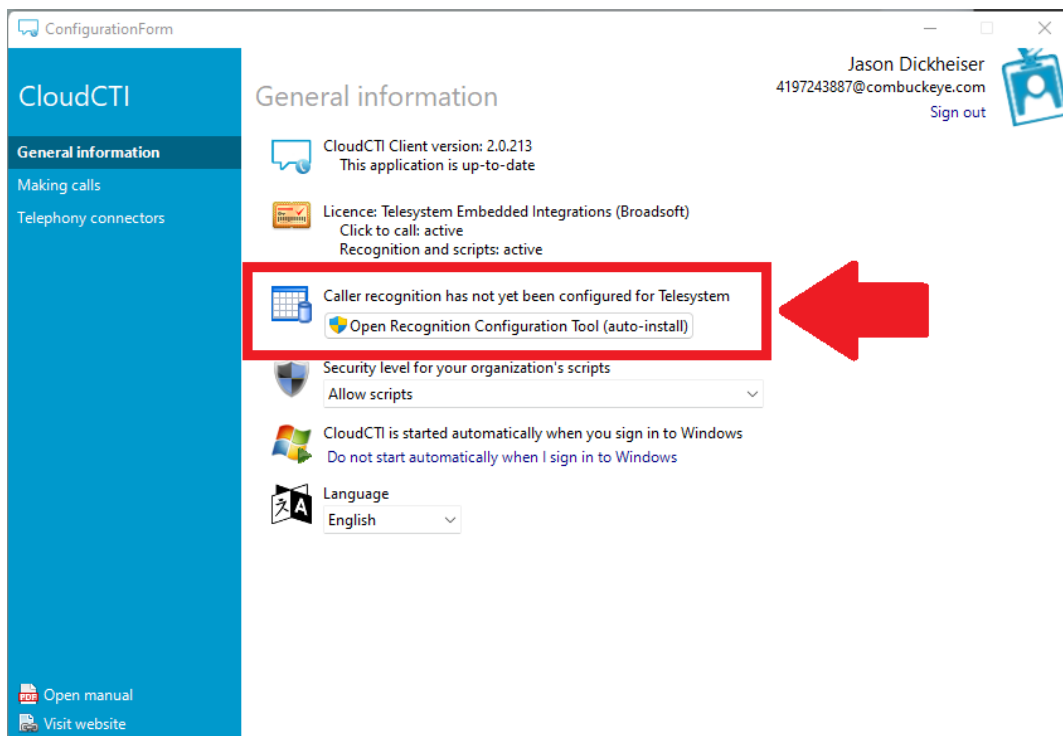
Installation

Download and install the CRM Integrator Client from here:

<https://cloudctidownload.cloudcti.nl/files/Setups/CloudCTIClientSetup.exe>

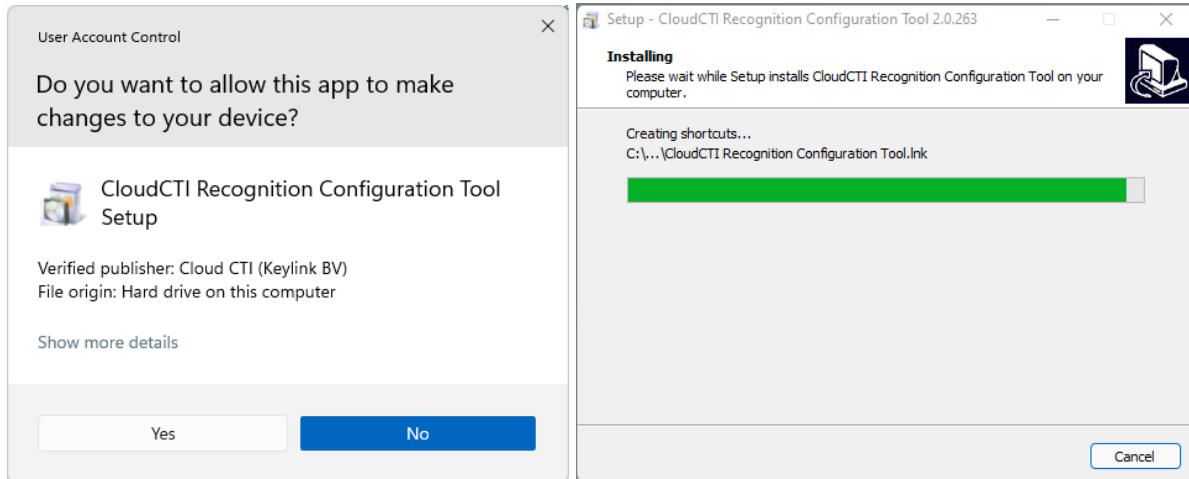
Use the CRM Integrator Client Install Guide if you need help installing the Client.

Once you have the client installed and you are logged in, on the **General Information** page, locate the selection to **Open Recognition Configuration Too (auto-install)**.

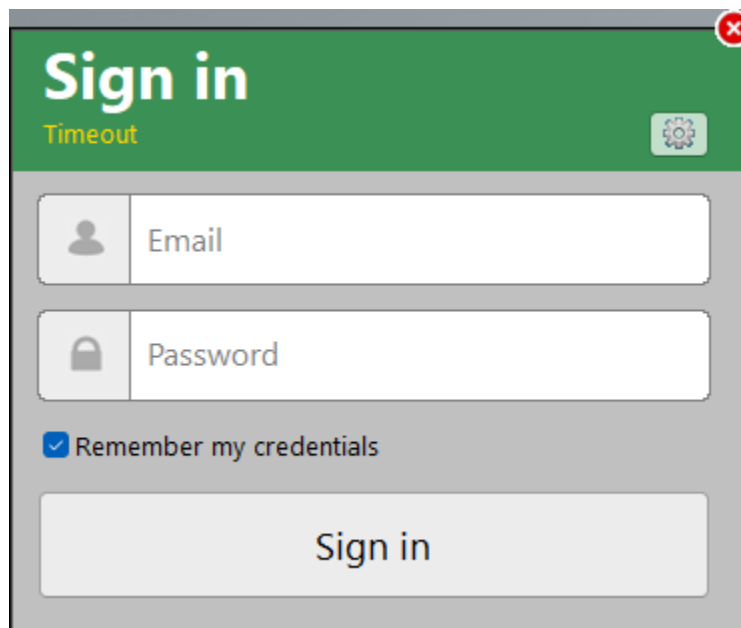


Click the button to initiate the installation of the Recognition Configuration Tool.

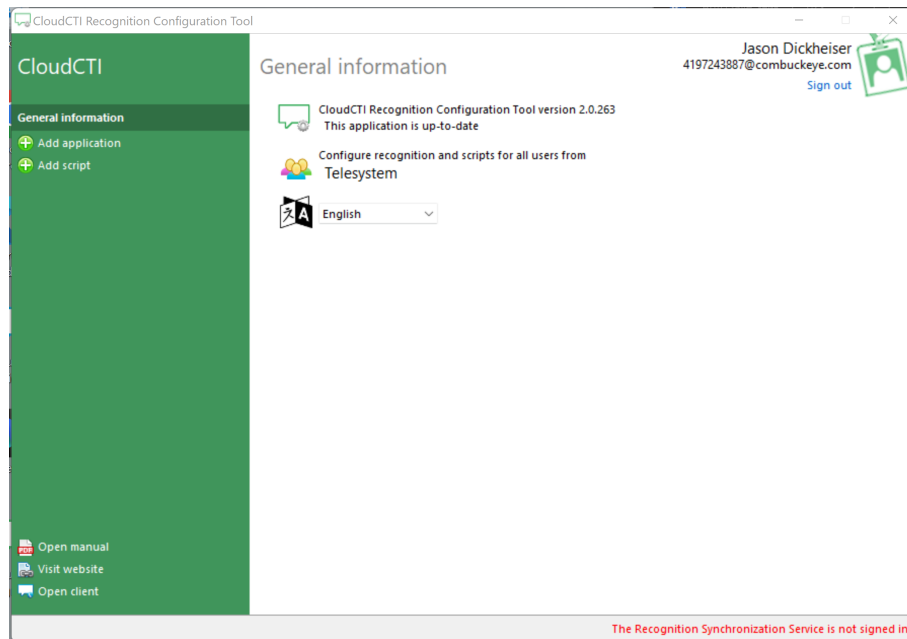
Once the install completes, you may receive a User Account Control box, select “Yes” to allow the app to make changes to your device to complete the installation.



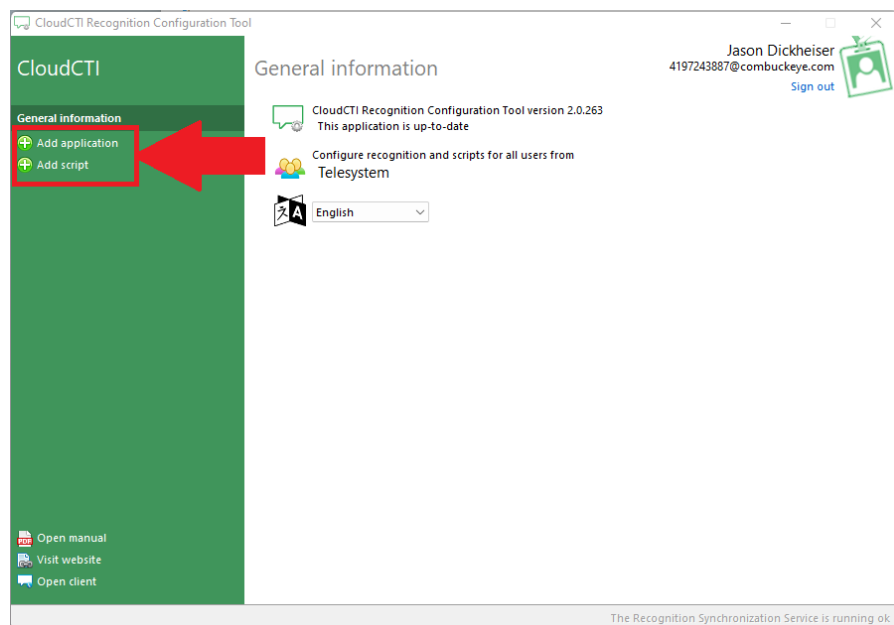
You will be prompted to log in to the tool. Use the same credentials used to login to the CRM Integrator Client for this tool. Note the green banner on the display. This is how you would identify the login is for the Recognition Configuration Tool because the CRM Integrator Client uses a blue login banner.



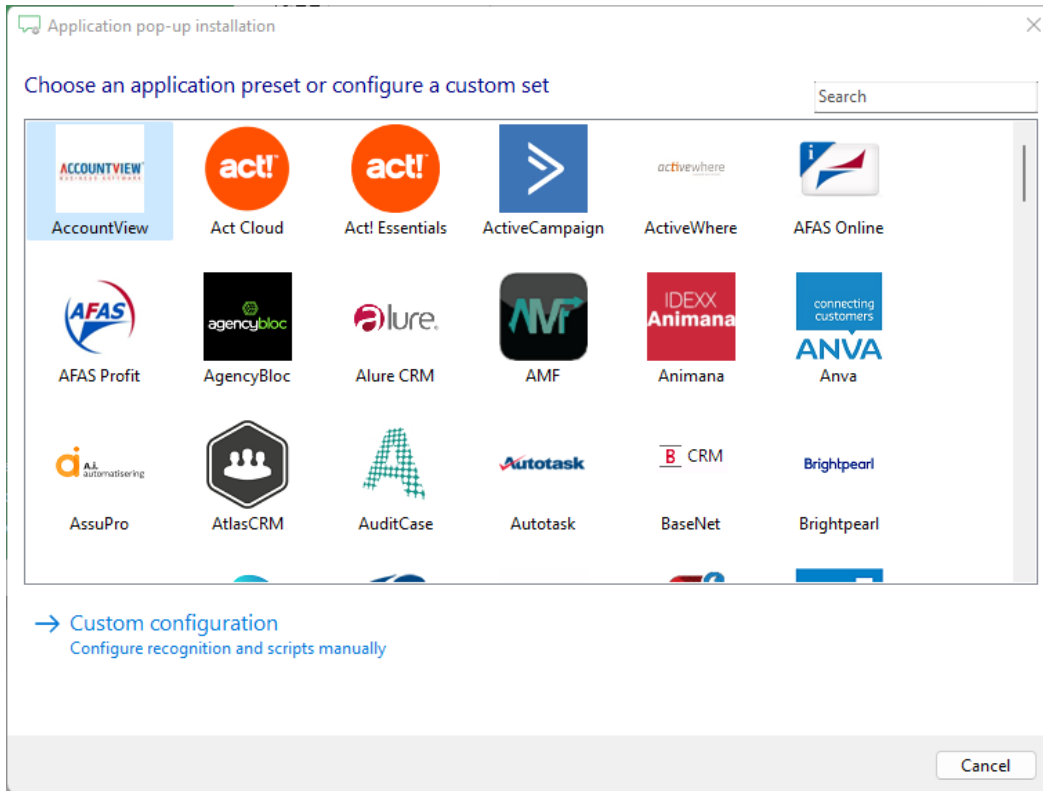
Once you are signed in, you will see the **“General information”** menu. From this page you will see the application version and you can set your language preferences. Supported languages for the Recognition Configuration Tool are English and Dutch.



On the left-hand navigation pane, there are options to **“Add application”** and **“Add script.”** Use these options to configure the CRM Integrator’s Recognition for your specific CRM.



The **Add application** allows you to select from pre-built integrations with CRM Applications currently available. Click this link to open the Application pop-up installation window.



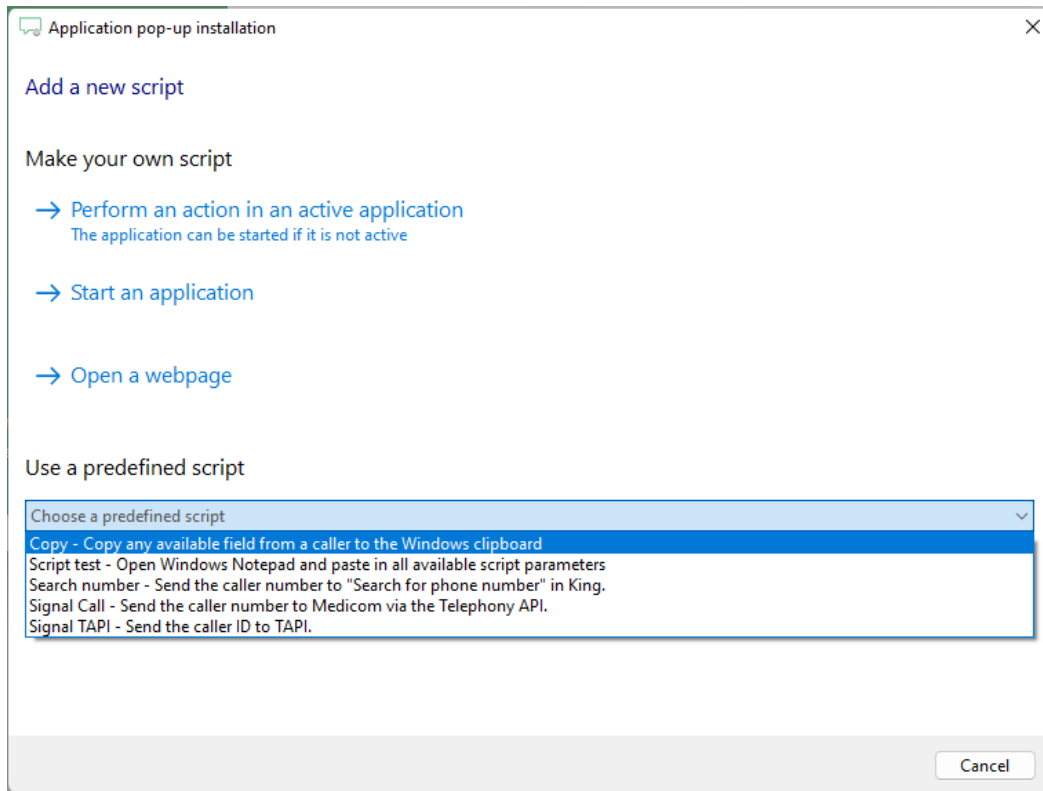
From here, scroll through the list or use the search bar, to locate your CRM Application.

Based on the CRM Application that you use, you will be presented with additional configuration steps. For example, Salesforce users will need to enter Username, Password, Security token, and SOAP URL to configure their integration, which Hubspot users would need to click to “connect” which will open another pop-up window where they must sign into Hubspot and continue the setup.

NOTE: You can search the following page for CRM Applications that are supported by the CRM Integrator and get information about the integration features available for the CRM: [LINK](#)

If you have a Custom Configuration, use the option at the bottom labeled “Custom configuration.” This will allow you to configure custom scripts manually and use Excel, ODBC connection, or Text file to configure recognition.

Users who wish to make their own script should click on the “**Add script**” option from the **General information** menu.



From here you will be prompted to “Make your own script,” with options to **Perform an action in an active application**, **Start an application**, **Open a webpage**. There are also some predefined scripts available for you to use:

- **Copy** – Copy any available field from a caller to the Windows clipboard.
- **Script test** – Open Windows Notepad and paste in all available script parameters.
- **Search number** – Send the caller number to “Search for phone number” in King.
- **Signal Call** – Send the caller number to Medicom via the Telephony API.
- **Signal TAPI** – Send the caller ID to TAPI.