How to configure caller recognition and screen-pop for:

Brio

Contact replication method: None
Screen pop method: Webhook

Prerequisites

The Brio integration is completely configured from within the Brio user interface. The connection between the user's phone and their Brio account must be authorized by the users themselves. Therefore, with CloudCTI, all users require "recognition admin privileges". And to match call to users, the email address of the user should match in both configurations.

The caller recognition and screen pop function requires the user's CloudCTI account to have an active connection to the phone system (also see notes for a number of checks)

Configuration steps

The configuration process described below is also shown in these short clips:

> FR:
> https://res.cloudinary.com/portima/video/upload/v1675239021/Brio/Tutorials/Telephony/TEL01_FR.mp4
> NL
> https://res.cloudinary.com/portima/video/upload/v1676637099/Brio/Tutorials/Telephony/TEL01_NL.mp4

Telephony is first activated per location:

1. In Brio, on the top right, open your profile menu and under 'COURTIER' click 'Signalétique – Paramètres' or under 'MAKELAAR' 'Gegevens – Instellingen'.
2. On the next screen, under 'Accèss' click 'Données courtier suite' or 'Makelaargegevens Vervolg'
3. Click 'Modifier' or 'Wijzigen'
4. In this screen verify the email address here matches the CloudCTI username. Then open the combobox with 'Fournisseur de téléphonie' / 'Telefoonaanbieder' and select CloudCTI.
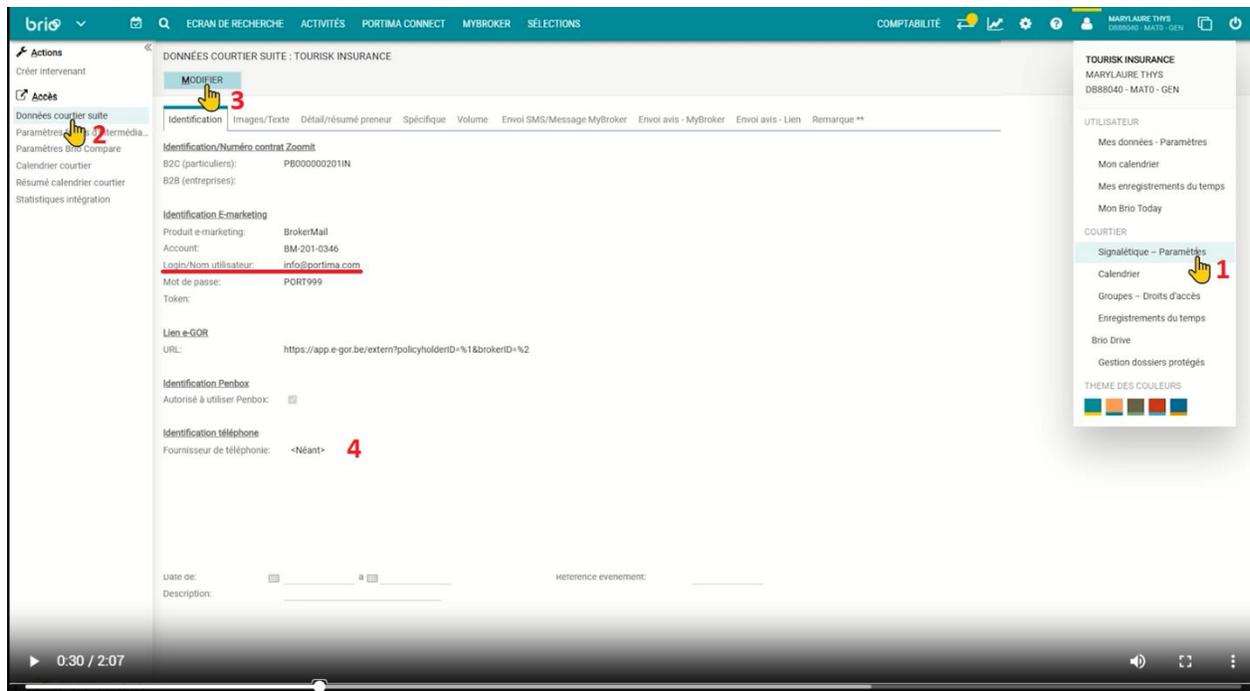
Then telephony is activated per user:

1. In Brio, on the top right, open your profile menu and under 'UTILISATEUR' click 'Mes Données – Paramètres' or under 'GEBRUIKER' 'Mijn Gegevens – Instellingen'.
2. On the next screen, under 'Actions' or 'Wat doen' click 'Activer téléphonie' or 'Telefonie activeren'
3. To finalize, enter the credentials of your CloudCTI account and authorize access to the API. After this step, the Brio webhook is registered and activated for the user.
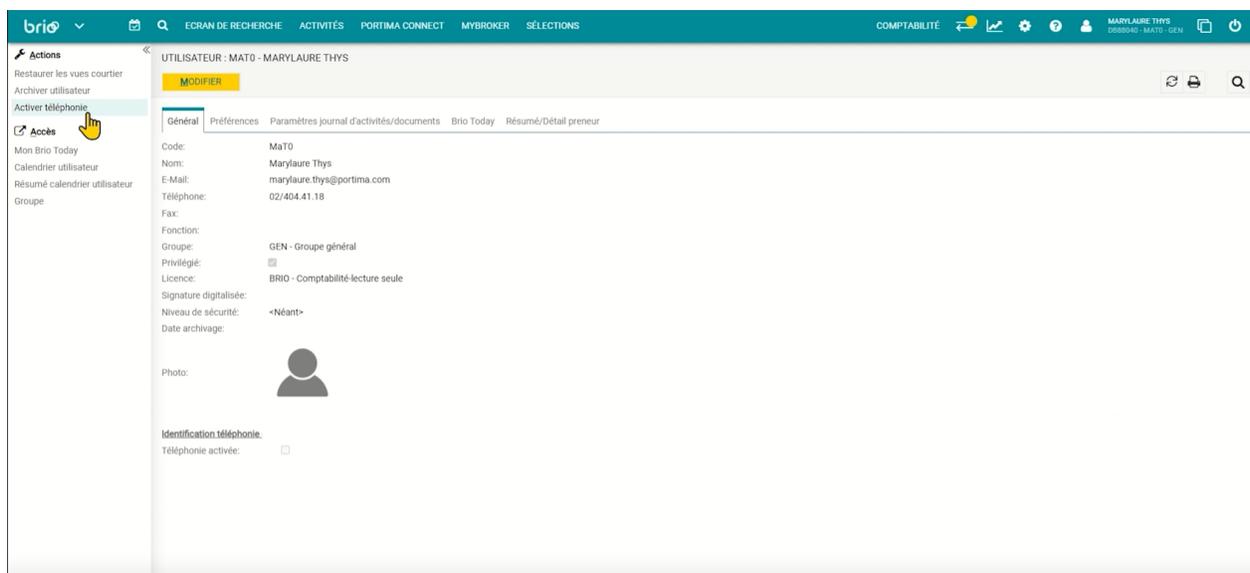
Notes

The connection requires CloudCTI to have an active connection to the phone system. To verify whether this is the case, sign into https://webclient.cloudcti.nl and click the button with the phone icon. The info screen should show "Your phone is connected" in green letters.
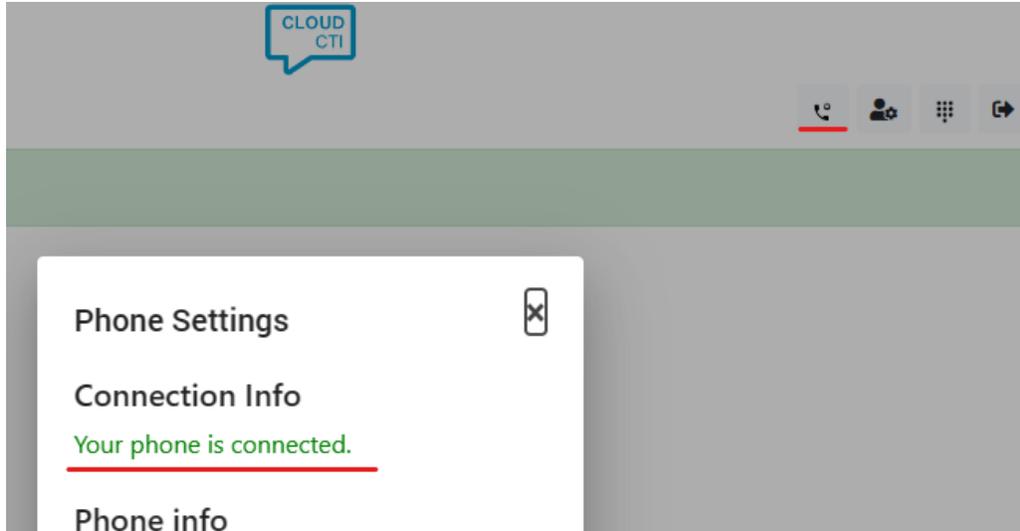
With 3CX, the connection depends on the local 3CX Desktop App, make sure TAPI is active and connected. To verify, go to profile, settings (1) and then click 'integration' on the left (2).
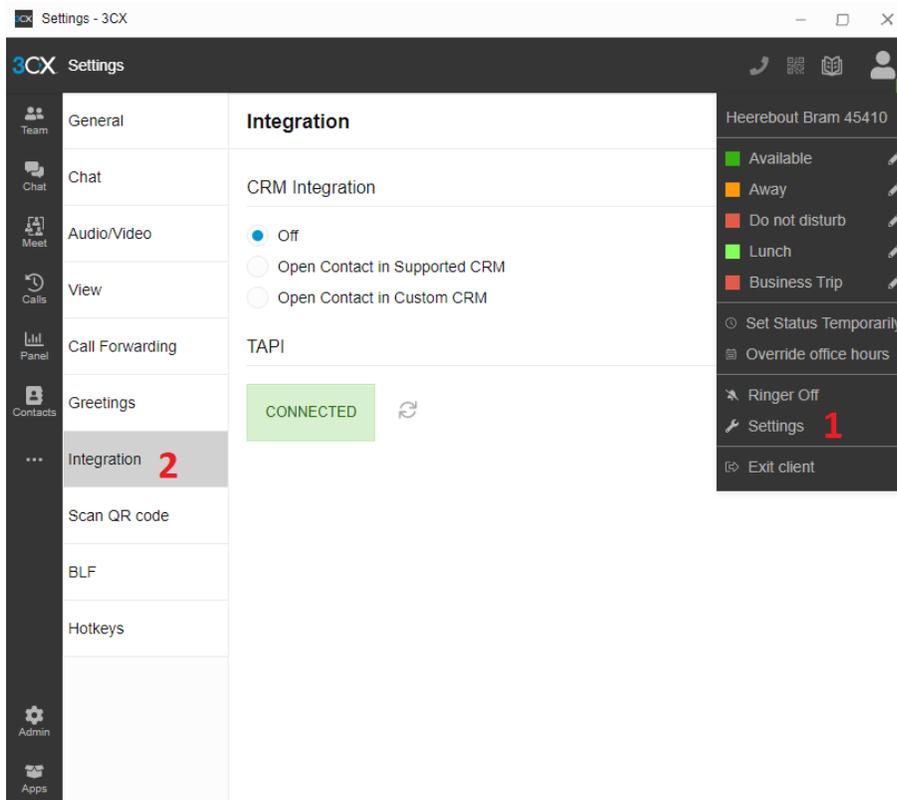
Delivery of the Brio integration and support takes place via our distributor Galaxy Telematica. Resellers are invited to request a free test and demo account for resellers.

GALAXY TELEMATICA BV: https://cloudcti.nl/galaxy-telematica

If issues are encountered while the CloudCTI phone connection is working as expected (i.e. successful connection in the CloudCTI webclient), then please contact Portima support at telephonysupport@portima.com.