

How to configure caller recognition and screen-pop for:

## AuditCase

Contact replication method: API or CSV/Text export

Screen pop method: URL

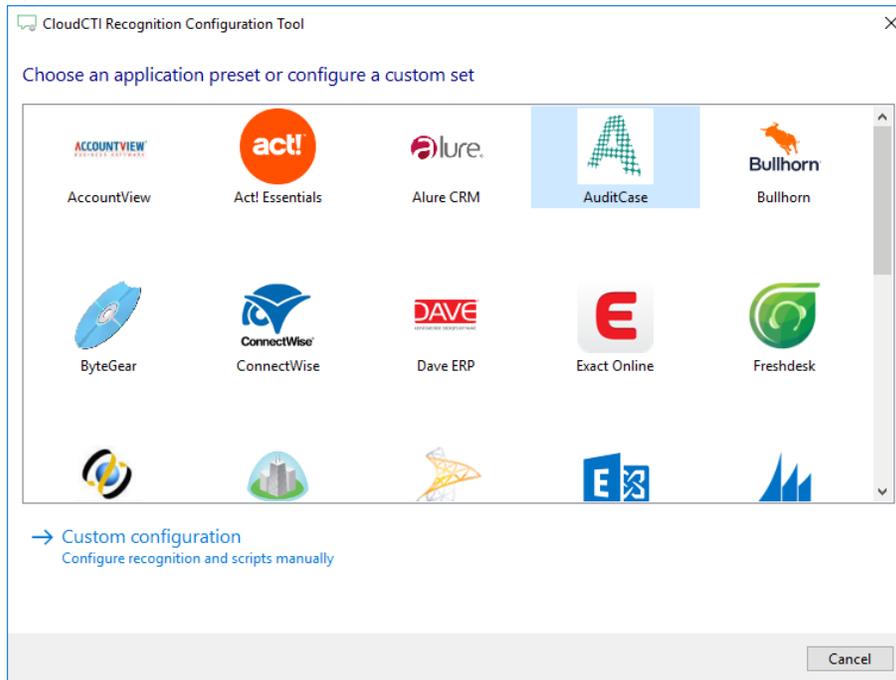
### Prerequisites

AuditCase can be integrated using two distinctly different methods:

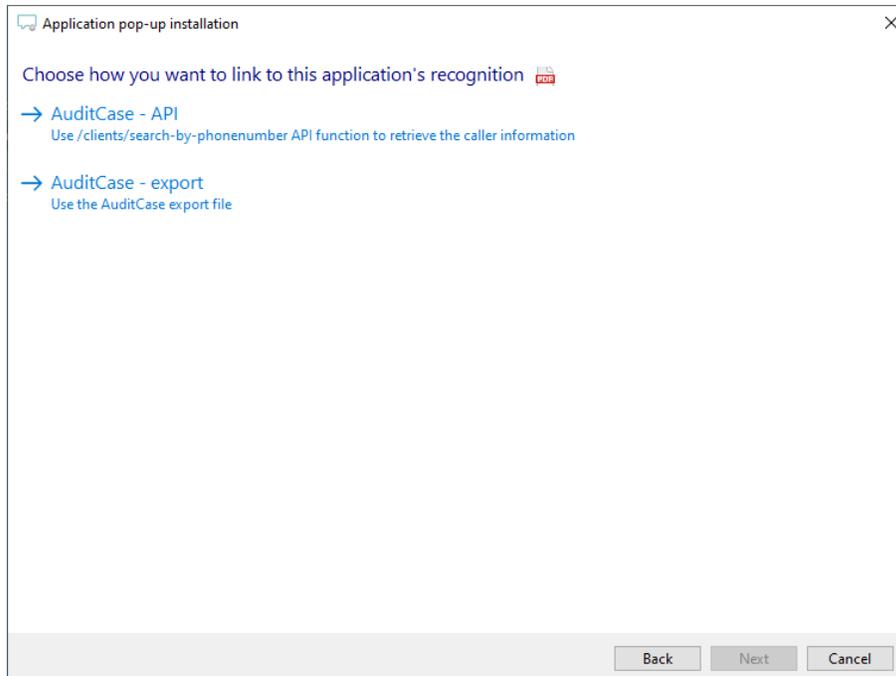
- A. Use the /clients/search-by-phonenummer API function to retrieve the caller information. This is easy to setup, only requires an API key and is always up to date.  
More info, see: [Toegang tot de API – Change to Comm. \(zendesk.com\)](#)
- B. Use a standard CSV/Text export file. This method is very robust and makes it transparent which numbers will be recognized. Recognition is fast and does not require any resources from AuditCase. Updating, however, must be done manually.

## Configuration steps

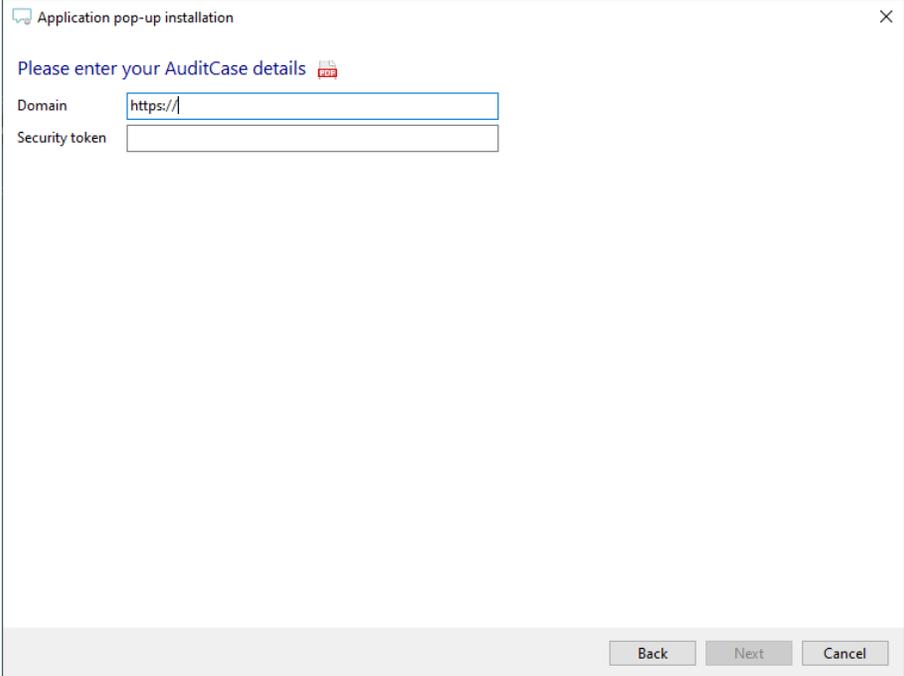
- 1) Start by clicking 'add recognition' in the Recognition Configuration Tool. From the list of applications, choose 'AuditCase', as shown below.



- 2) For method A choose 'AuditCase – API'. For method B choose 'AuditCase – export'.

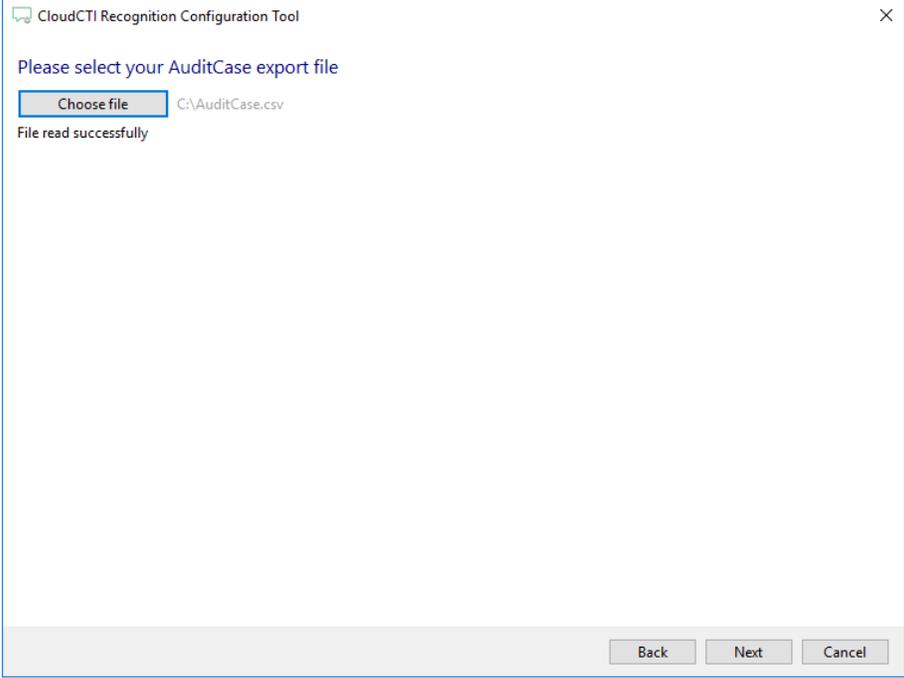


3) A) If you chose to use the API then fill in the domain and security token and click 'next'.



The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. The main text reads "Please enter your AuditCase details" followed by a small red icon. Below this, there are two input fields: "Domain" containing the text "https://" and "Security token" which is empty. At the bottom of the dialog, there are three buttons: "Back", "Next", and "Cancel".

B) If you chose to use the export file then select to the downloaded AuditCase export file.



The screenshot shows a dialog box titled "CloudCTI Recognition Configuration Tool" with a close button (X) in the top right corner. The main text reads "Please select your AuditCase export file". Below this, there is a "Choose file" button and the file path "C:\AuditCase.csv". Below the file path, it says "File read successfully". At the bottom of the dialog, there are three buttons: "Back", "Next", and "Cancel".

Since the –CSV file does not contain column names, please fill in the headers of the text file and check the phone number fields. Click ‘next’ to continue

CloudCTI Recognition Configuration Tool

Configure the recognition fields

URL	Naam beller + klant	Telefoonnummer 1	Telefoonnummer 2	Telefoonnummer 3
Custom field	Name	Phone number	Phone number	Phone number
http://demo.changetocor	Change To Comm. B.V. dr		+31628642178	+31628642178
http://demo.changetocor	Mevrouw drs. M. van Prob			
http://demo.changetocor	Change To Comm. B.V. A.		+31628642178	
http://demo.changetocor	Trust B.V. W. van Bruggen			
http://demo.changetocor	Change To Comm. B.V. Cr	+31342424570		
http://demo.changetocor	Change To Comm. B.V. Lo	+31342424570		

Back Next Cancel

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

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: Callee number

Source: Application name

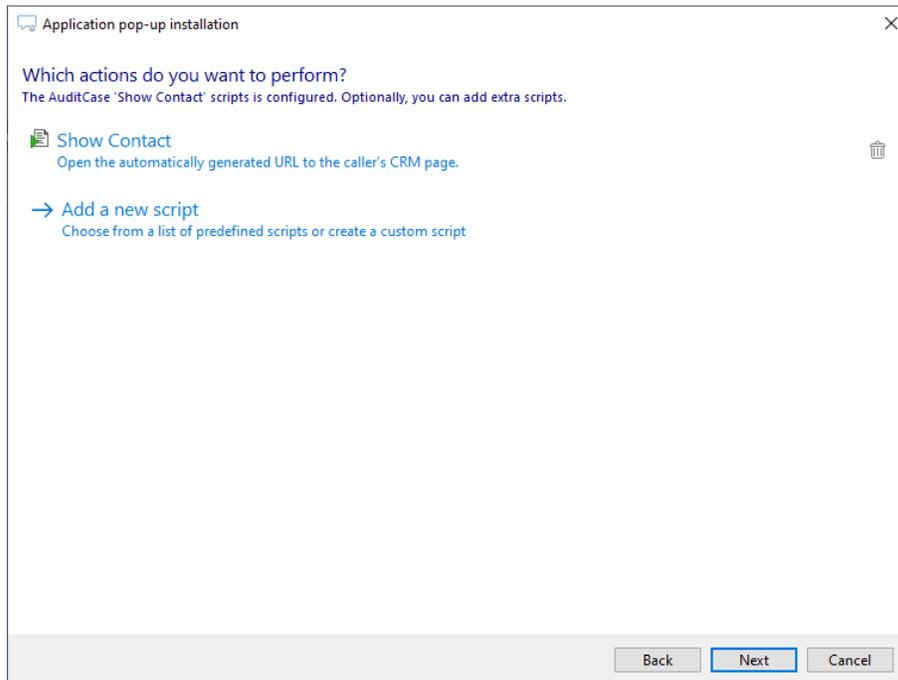
Open contact

\* Windows allows a maximum of 4 lines, and a maximum of 128 characters

Add field

Back Next Cancel

- 5) By default, the screen pop script is configured to open the caller’s customer card. You may leave this default. Click ‘next’ to continue.



- 6) Check the configuration summary and click finish to add the recognition from AuditCase

