

How to configure caller recognition and screen-pop for:

Autoflex

Contact replication REST API

Screen pop method: Generated URL

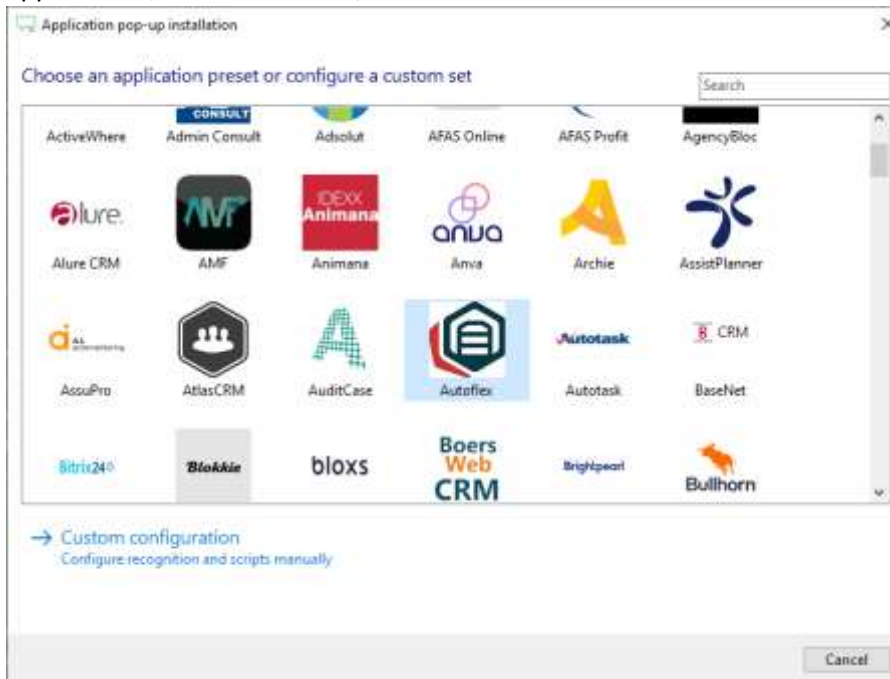
Prerequisites

To enable caller recognition, we require access to your data via the Autoflex REST API. Please provide your Autoflex username and password.

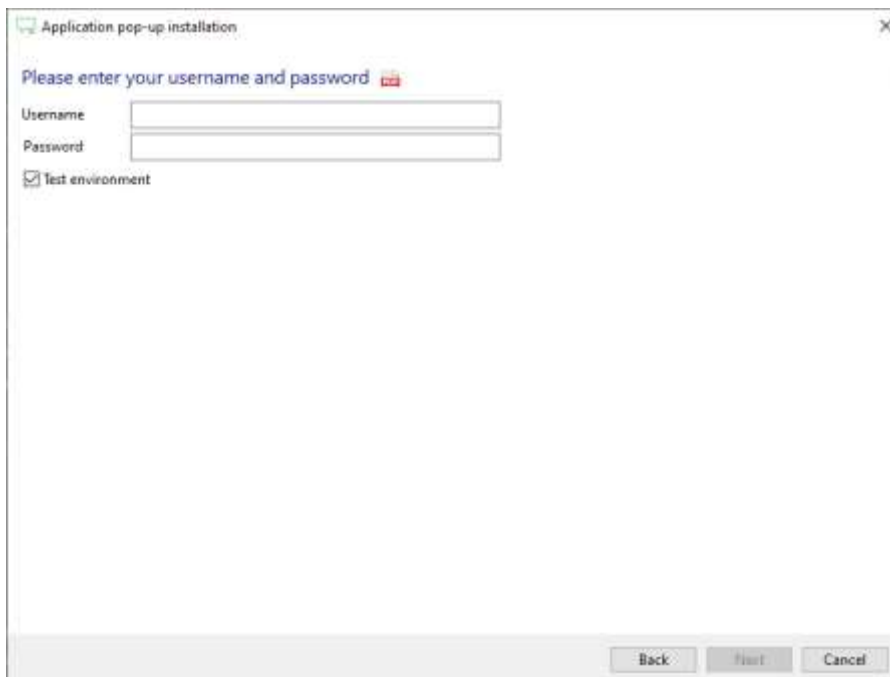
To automatically open recognized contacts in Autoflex during a call, ensure that each user has a unique email address that matches their email address in their CloudCTI user account.

Configuration steps

- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Autoflex, as shown below.



- 2) Authorize access to the API.



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

The screenshot shows a window titled 'Application pop-up installation' with a sub-header 'Client call notification'. Below the sub-header is the instruction: 'Configure the information you want the client to show when a caller is recognized from this set'. A preview of the call notification is shown, featuring a blue telephone icon and a dark box with the text 'Incoming call'. Below this, four fields are listed: 'Name: DisplayName', 'Email: Email', 'Organization: Organization', and 'City: City'. An 'Open contact' button is positioned to the right of these fields. Below the preview, a note states: '* Windows allows a maximum of 4 lines, and a maximum of 128 characters.' An 'Add field' button is located at the bottom of the preview area. At the bottom of the window are 'Back', 'Next', and 'Cancel' buttons.

- 4) The 'Show Contact' script is preconfigured. You can add extra scripts or replace the 'Show Contact' script.

The screenshot shows a window titled 'Application pop-up installation' with the sub-header 'Which actions do you want to perform?'. Below the sub-header is the instruction: 'The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.' Two options are listed: 'Show Contact' with the description 'Open the automatically generated URL to the caller's CRM page.' and 'Add a new script' with the description 'Choose from a list of predefined scripts or create a custom script'. At the bottom of the window are 'Back', 'Next', and 'Cancel' buttons.

- 5) Check the configuration summary and click 'Finish' to add the integration with the application.

