

How to configure caller recognition and screen-pop for:

## Clio

Contact replication method: REST API

Screen pop method: Generated URL

### Prerequisites

To configure your connection with Clio, you need to select your domain and enter a **Client ID** and **Client Secret** obtained from the app you created in the Clio environment.

### Steps to Create Your App and Connect it to CloudCTI:

#### 1. Log in to the Clio Developer Portal

Visit the developer section of Clio using this link: [developers.clio.com/apps](https://developers.clio.com/apps).

- Note: The URL may vary depending on your domain. For example, European users should use <https://eu.developers.clio.com/apps>.

#### 2. Create a New App

- Click on "**New App**" and fill in the required details.
- In the **Redirect URIs** field, enter:  
<https://auth.cloudcti.nl/webapi/oauth2>

#### 3. Set Permissions

- Grant the following permissions:
  - **Read Permission:** For *Contacts* and *Users*.
  - **Write Permission:** For *Communications* (required for call registration).

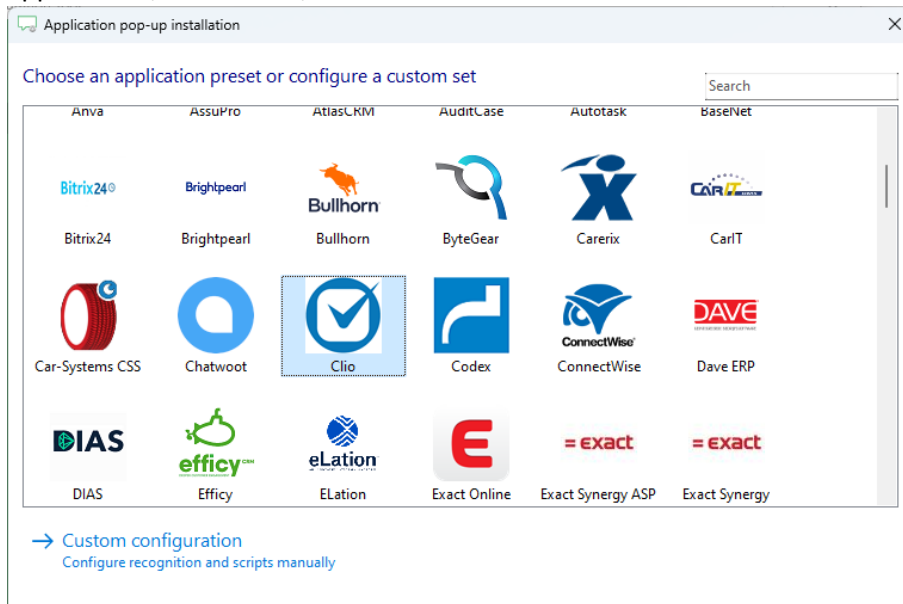
#### 4. Save and Retrieve Credentials

- After saving the app, you will receive the **Client ID** and **Client Secret**.
- Use these credentials in the CloudCTI configuration tool.

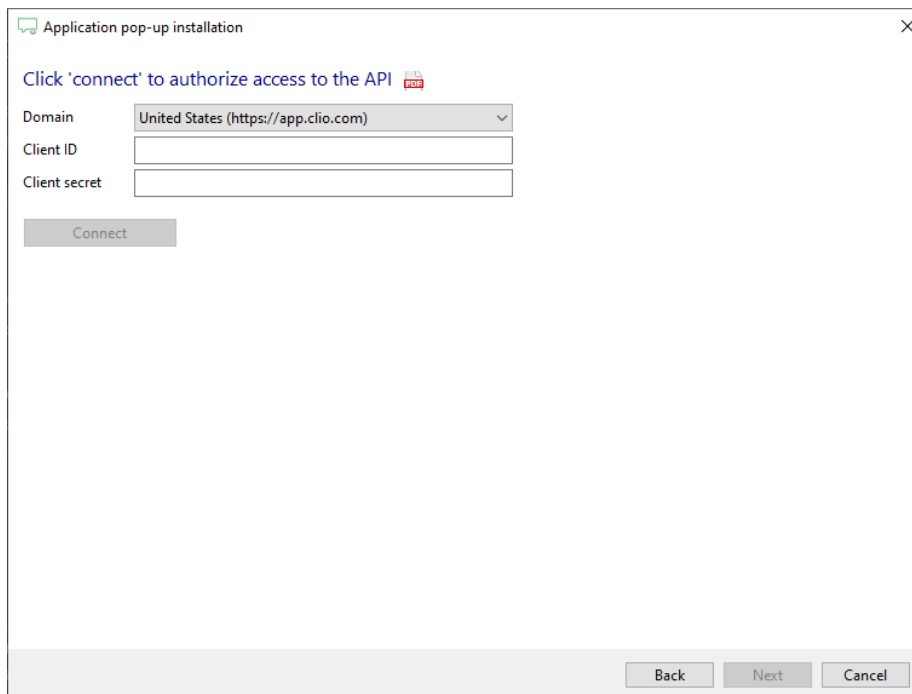
By following these steps, you'll be able to connect your Clio app to CloudCTI successfully and enable caller recognition functionality.

## Configuration steps

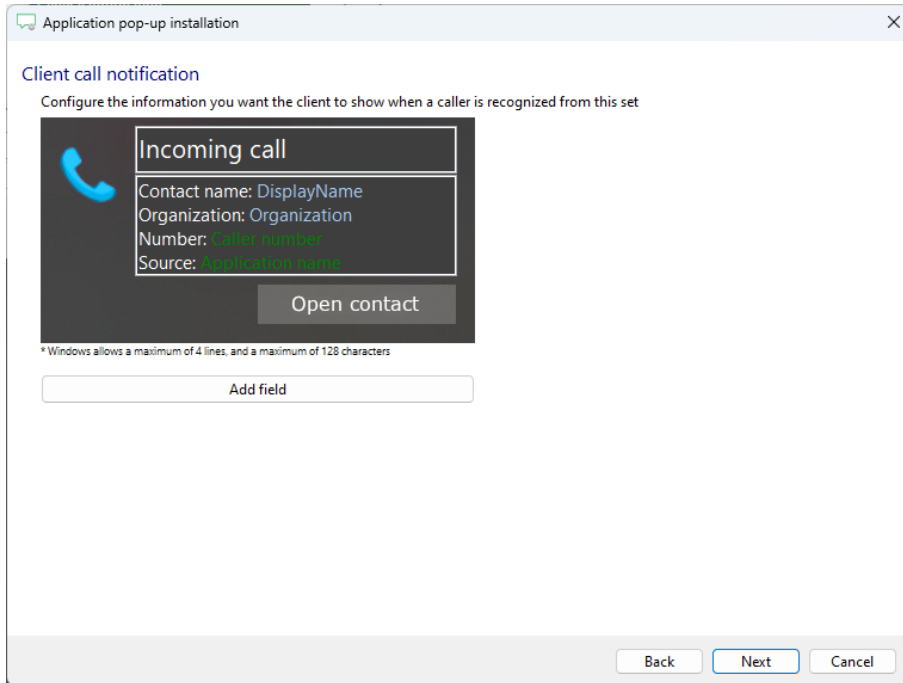
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Clio, as shown below.



- 2) Authorize access to the API.



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



4) Check the configuration summary and click 'Finish' to add the integration with the application

