



How to configure caller recognition and screen-pop for:

Clio

Contact replication method: REST API

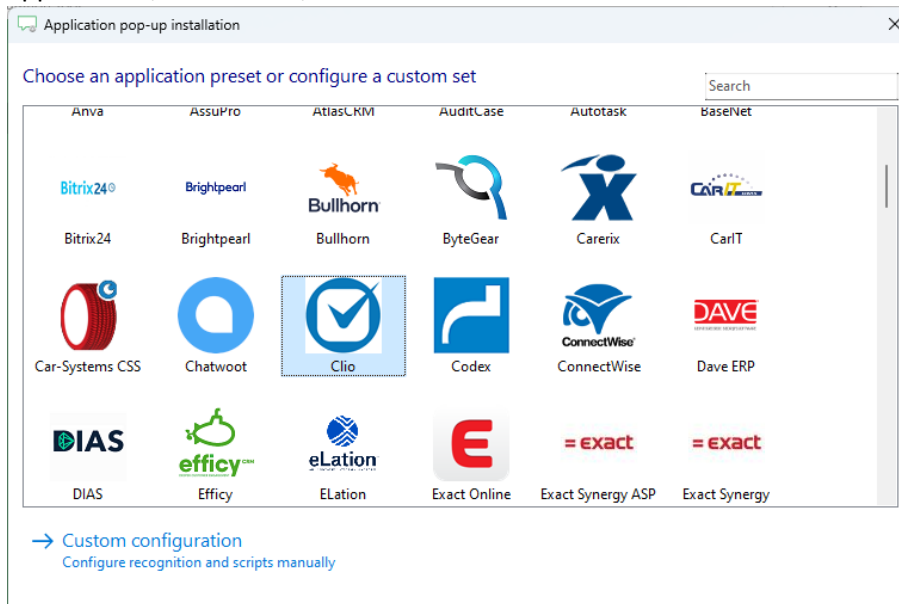
Screen pop method: Generated URL

Prerequisites

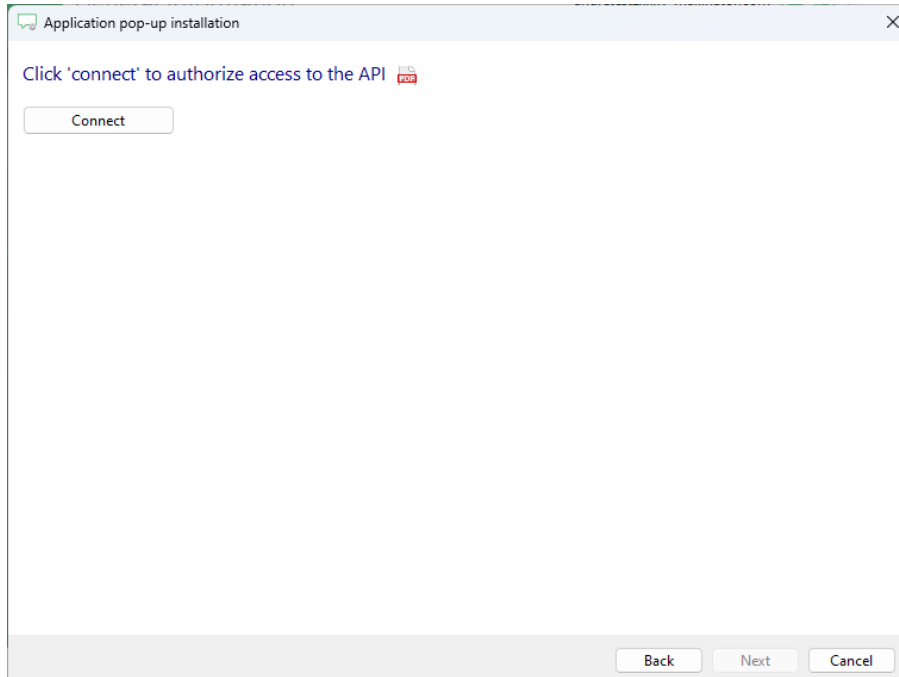
The caller recognition requires access to your data via the Clio REST API. To allow access to this, the Recognition Update service must be authorized via OAuth to read Clio data.

Configuraton steps

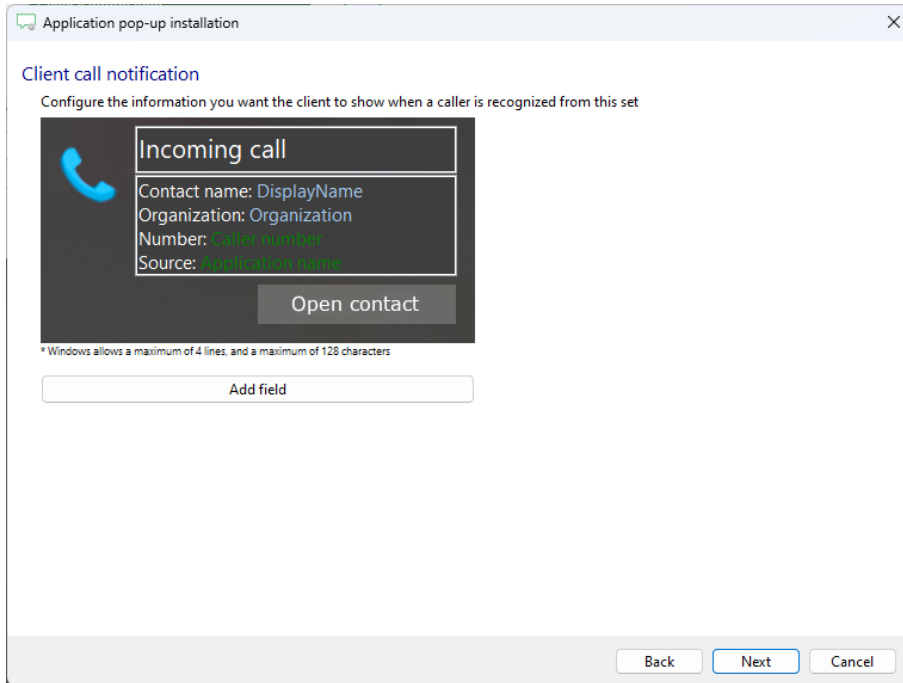
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Clio, as shown below.



- 2) Authorize access to the API.

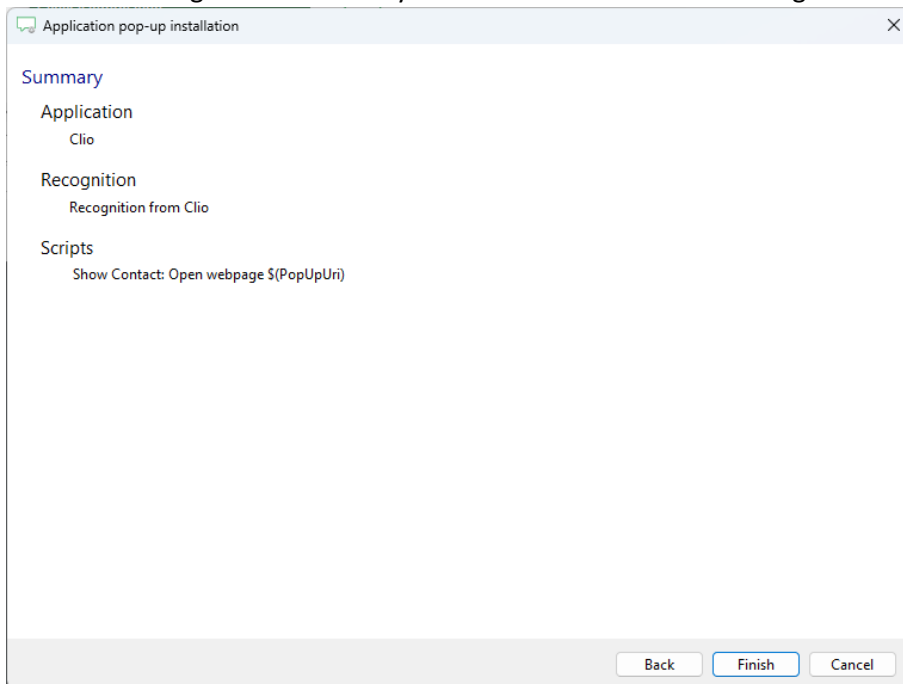


3) Choose which fields to display in the call notification on an incoming call.



The screenshot shows a configuration window titled "Application pop-up installation". Under the "Client call notification" section, there is a preview of a call notification window. The preview shows a blue telephone handset icon on the left and a dark grey box on the right containing the following text: "Incoming call", "Contact name: DisplayName", "Organization: Organization", "Number: (609) 426-1234", and "Source: Application Name". Below the preview is a grey button labeled "Open contact". Underneath the preview, a note states: "* Windows allows a maximum of 4 lines, and a maximum of 128 characters". Below the note is a white input field with the text "Add field". At the bottom of the window are three buttons: "Back", "Next", and "Cancel".

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



The screenshot shows the same "Application pop-up installation" window, but now displaying a "Summary" section. The summary lists the following configuration details: "Application: Clio", "Recognition: Recognition from Clio", and "Scripts: Show Contact: Open webpage \$(PopUpUri)". At the bottom of the window are three buttons: "Back", "Finish", and "Cancel".