How to configure caller recognition and screen-pop for:

Filevine

Contact replication method: REST API
Screen pop method: Generated URL

Prerequisites

Access to the API requires authentication using API keys which can be created in the Filevine portal. If you don't already have access to the portal, filevine support can help with that. Send the Org name and user email of your Org Admin from Filevine to support@filevine.com or in a chat through their help center at: https://support.filevine.com/. Once logged in there, go to the Keys tab on the left and click on 'Create new key'. This will load a new page where the Purpose and Scopes need to be entered. The purpose is only important for your administration. For scopes, the scope 'Core: API' needs to be selected. Once selected press the 'Create' button to Create the API key. The values from the created API key that are important for the CTI integration are 'API Key' and 'Key Secret'.
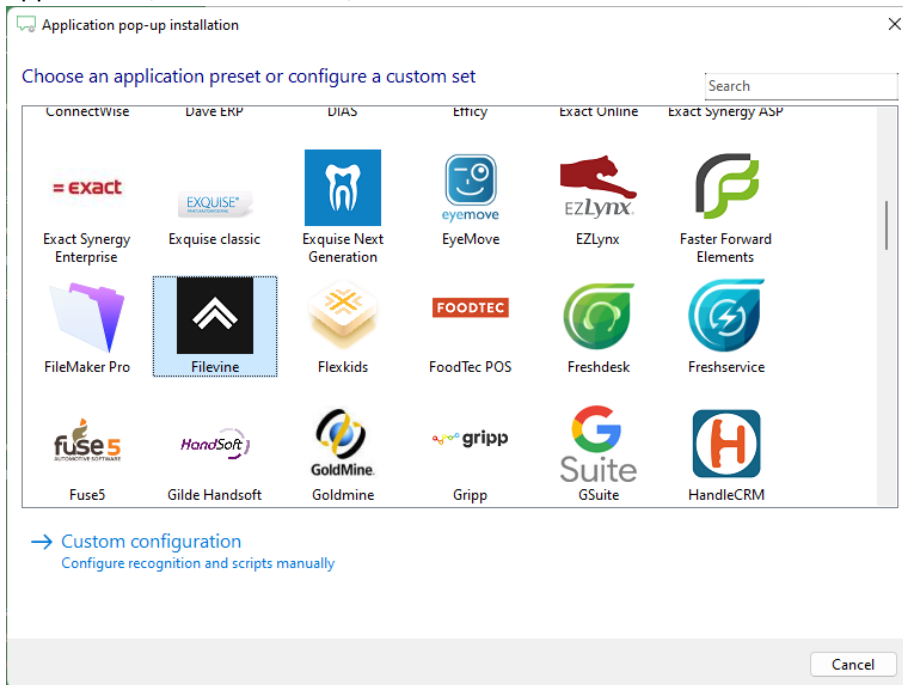
Notes

Phone numbers in Filevine are hyperlinked as tel: URL's and can automatically be dialed by choosing the 'MakeCall' protocol handler.
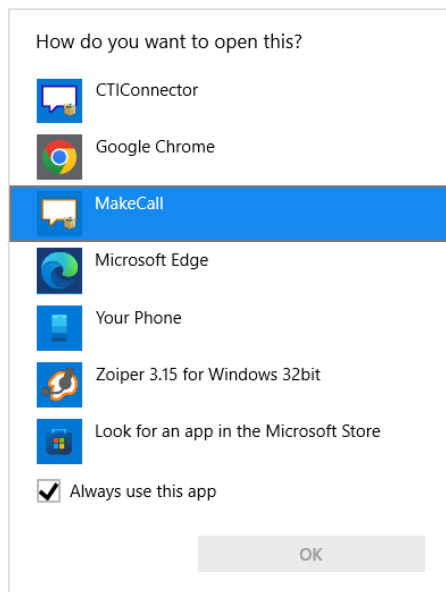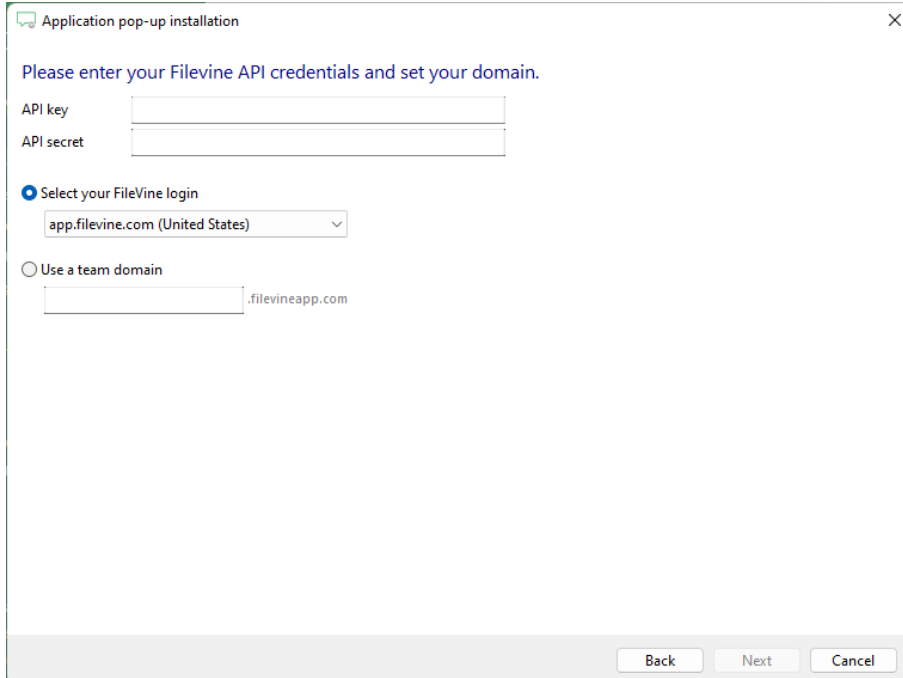
Configuraton steps
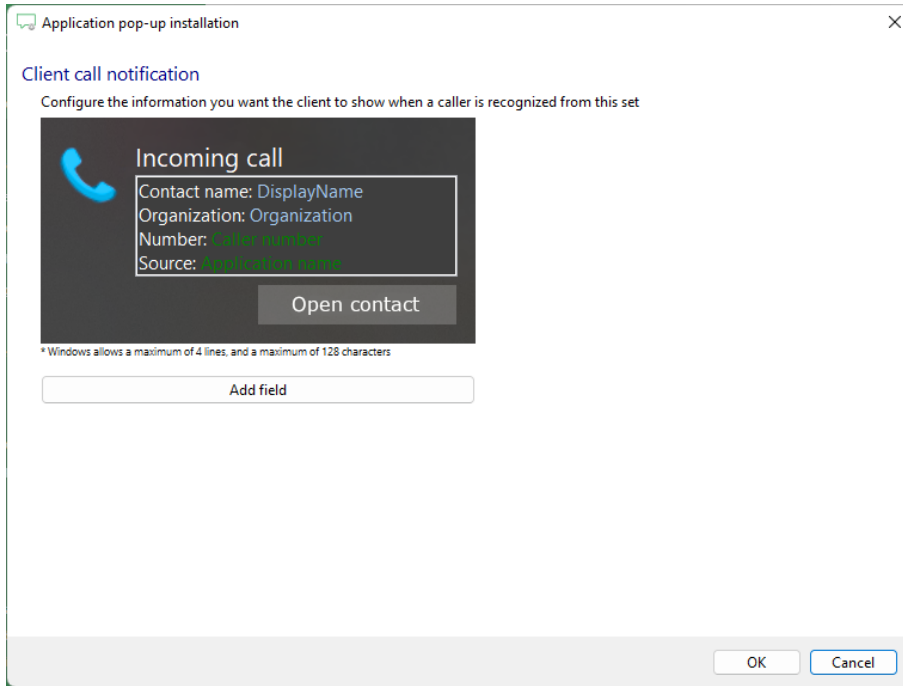
1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Filevine, as shown below.
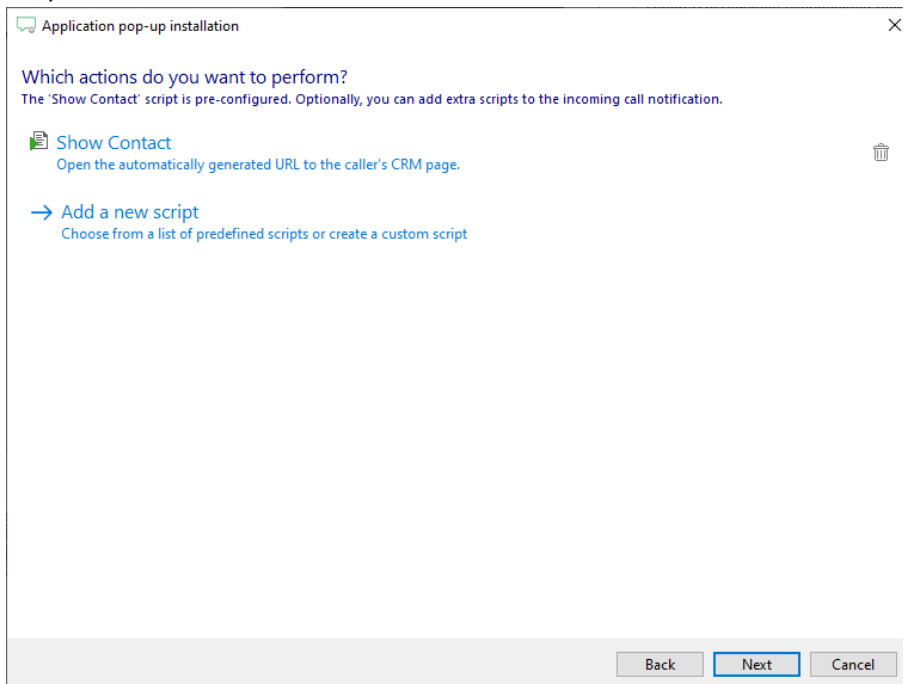

2) Authorize access to the API.

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

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

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

Application pop-up installation   ✕

Summary

Application
    Filevine

Recognition
    Recognition from FileVine

Scripts
    Show Contact: Open webpage $(PopUpUri)

Back	Finish	Cancel