

How to configure caller recognition and screen-pop for:

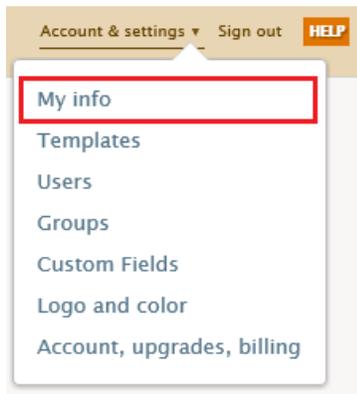
Highrise CRM

Supported versions: Highrise CRM Online
Contact replication method: Highrise XML API
Screen pop method: Url

Prerequisites

To use CloudCTI for caller recognition and application pop-up, you will require a Highrise Authentication token. The token can be obtained from your Highrise account settings.

Go to “Account & Settings > My Info” and select the “API Token Tab”



Copy the Authentication Token.

Or press “Regenerate” to create a new token. This will invalidate the existing token. Keep in mind that if you generate a new token, all applications using the old token will no longer have access to your data.

[Email dropbox](#) [Time zone and format](#) [Phone/email notifications](#) **API token** [Gmail](#)

Authentication token

Your authentication token is a special code that allows software and services outside of Highrise to connect to your account with your permission. It works like a password so you should keep it safe just as you do with your username and password. If you think your token might have been compromised, you can generate a new one.

e09e92714436061df2cca36718cbf455 [Regenerate](#)

Use your token with RSS feed readers, iCal or products that use the Highrise API.

Notes

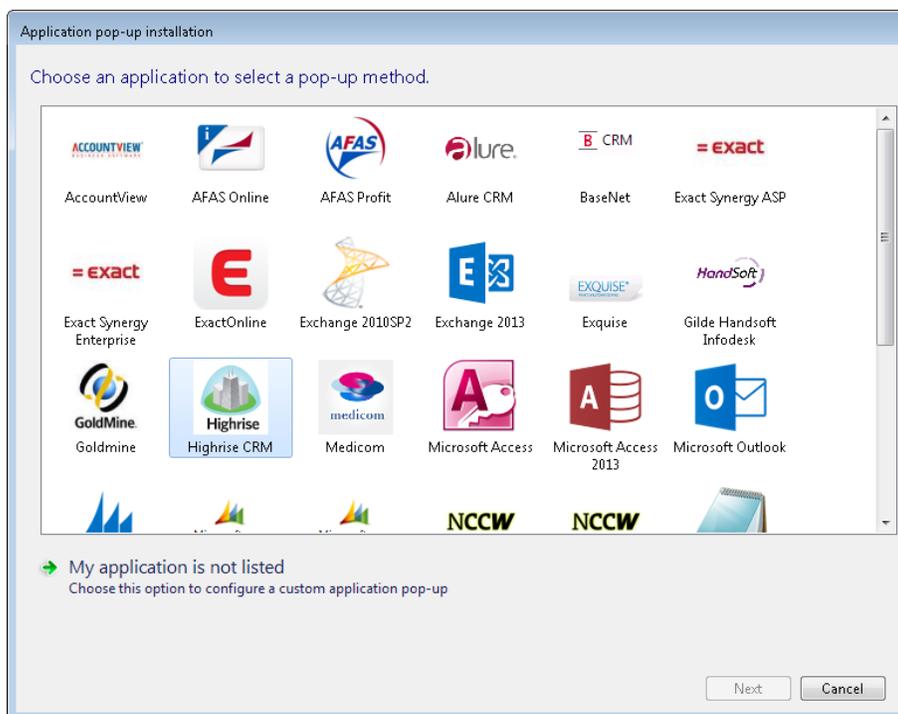
Highlight a phone number anywhere in Highrise CRM and press the hotkey to dial

Select contacts to add or remove tags, change who can see them, or delete.

-  **Fred Flintstone**
 CEO at StoneHedge inc.
 +1 555 555 555
-  **Jacksome**
 music sony mj
-  **Michael Jacksome**
 Singer at Jacksome
 +1 444 444 444
-  **StoneHedge inc.**
 +1 555 555 001

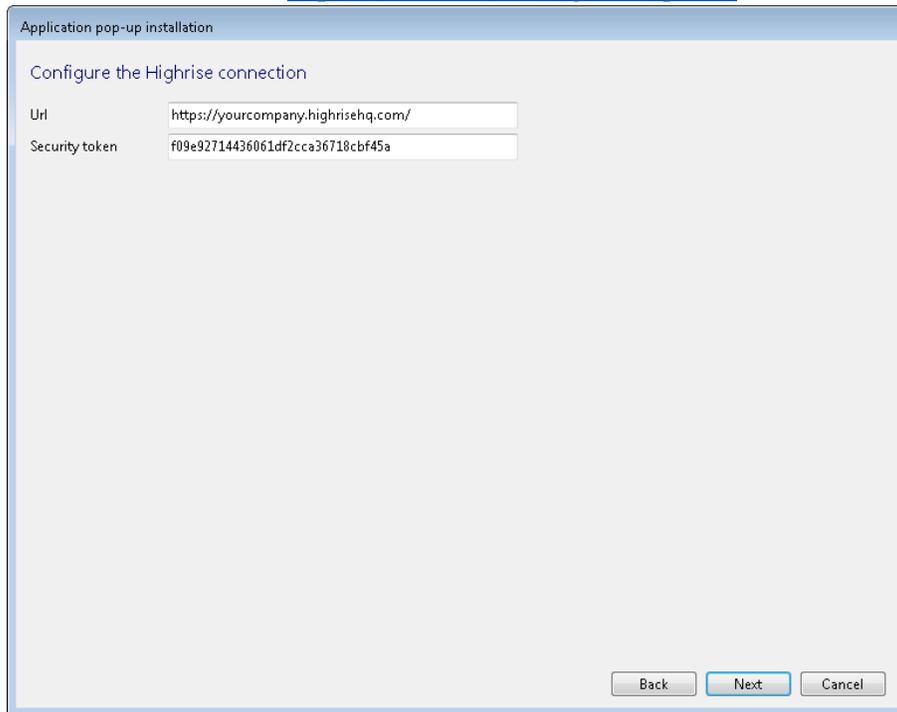
Configuration steps

- 1) Start by clicking ‘add recognition’ in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose ‘Highrise CRM’, as shown below.



- 2) Enter your Highrise CRM host url and API Authentication token from your account.

The url is formatted as: <https://yourcompany.highrisehq.com/>



Application pop-up installation

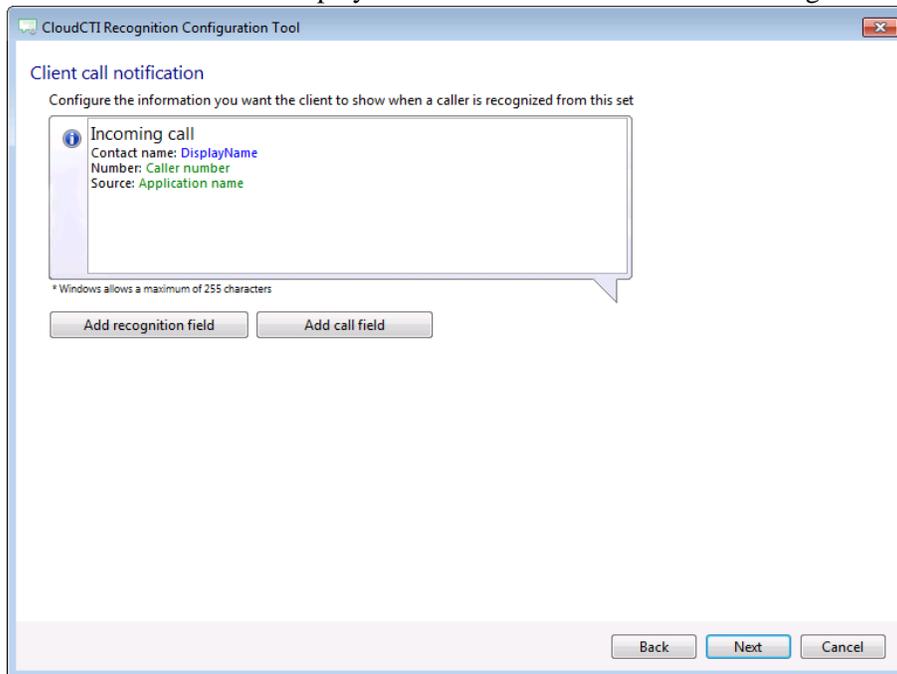
Configure the Highrise connection

Url:

Security token:

Buttons: Back, Next, Cancel

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



CloudCTI Recognition Configuration Tool

Client call notification

Configure the information you want the client to show when a caller is recognized from this set

Incoming call

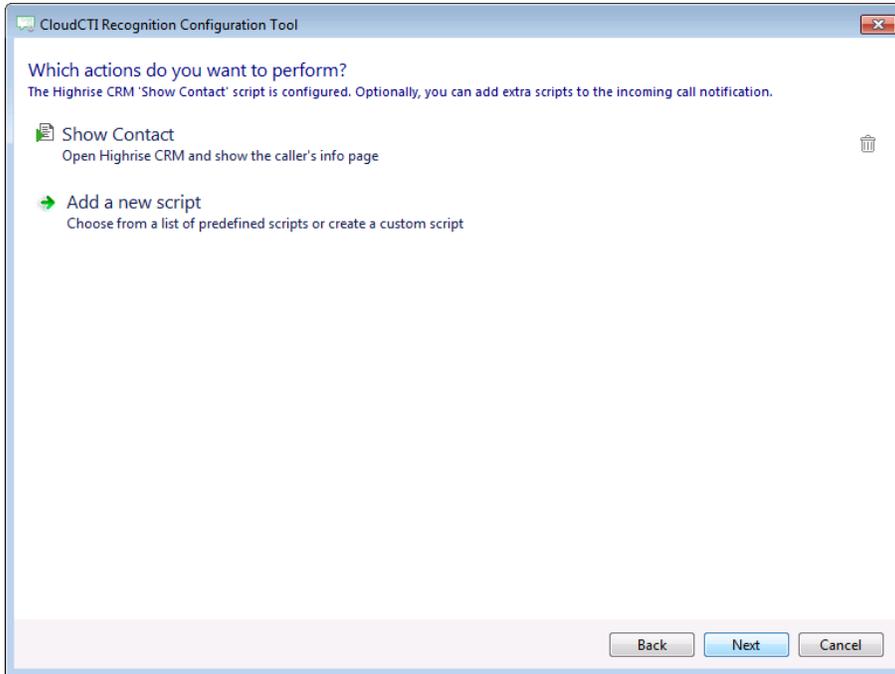
- Contact name: **DisplayName**
- Number: **Caller number**
- Source: **Application name**

* Windows allows a maximum of 255 characters

Buttons: Add recognition field, Add call field

Buttons: Back, Next, Cancel

- 4) Optionally, add extra scripts to the notification of a caller recognized from Highrise CRM or click 'next' to continue with the default script.



- 5) Check the configuration summary and click 'finish' to add the recognition from Highrise CRM.

