

How to configure caller recognition and screen-pop for:

Infusionsoft

Contact replication method: API

Screen pop method: URL

Prerequisites

The Infusionsoft integration uses web services for contact data replication. To enable this, the Recognition Update service must be authorized via OAuth to read Infusionsoft data.

Limitation: Currently it is only possible to retrieve contact information from the API. Therefore, calling customers that are stored as contacts will be recognized.

Notes

Dial from Infusionsoft by selecting the phone number, then press the keyboard hotkey (default: PAUSE)

John Doe 

Id: 2

Company Name:

Email:

State:

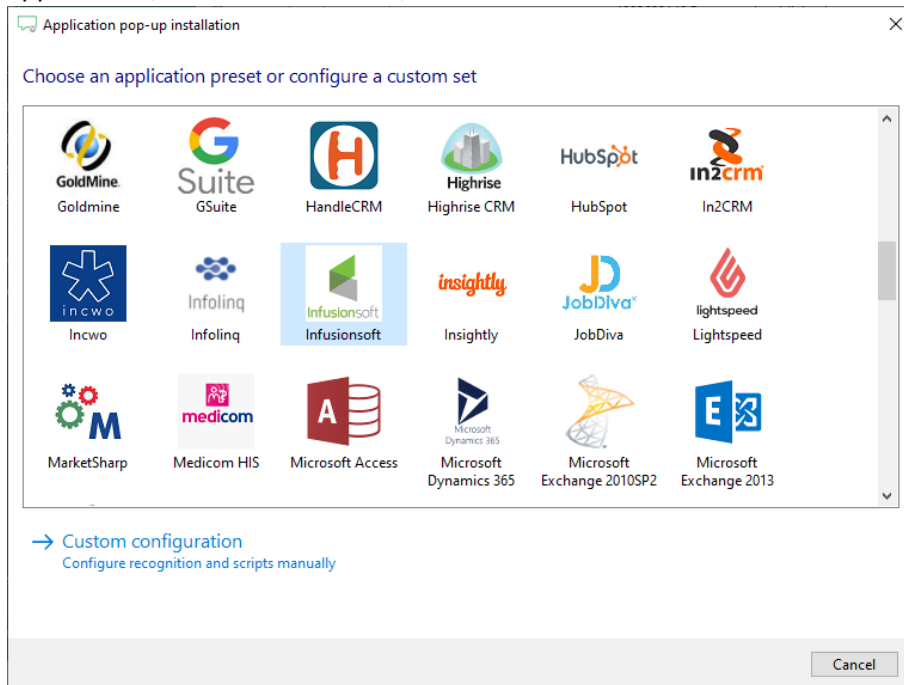
Phone 1: 012345678 (Work)

Phone 2: 55500 1111 (rk)

Phone 3:

Configuraton steps

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



2) Click 'Connect' and authorize access to the API.

The image shows two overlapping windows. The top window is titled "Application pop-up installation" and contains the text "Please enter your Infusionsoft details" with a "Choose file" button. The bottom window is titled "Infusionsoft authorization" and shows a URL in the address bar: "https://accounts.infusionsoft.com/app/oauth/authorize?client_id=mTaLSXxAV57KWfqC2EjW4t5Ojms2caLF&redirect_uri=https%". The main content of the authorization window is from "Account Central" and asks: "The application **CloudCTI by** would like the ability to interact with one of your Infusionsoft applications. Which application would you like to allow **CloudCTI** access to?". A dropdown menu shows "ex916.infusionsoft.com" selected. At the bottom right of the authorization window are "Deny" and "Allow" buttons.

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

