

How to configure caller recognition and screen-pop for:

Kleos

Contact replication method: REST API

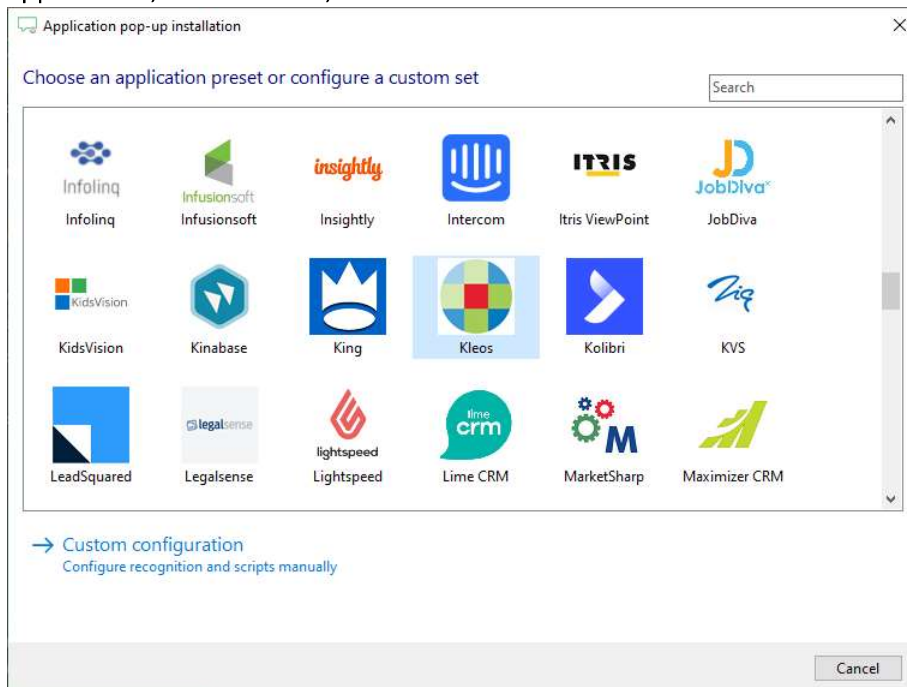
Screen pop method: Generated URL

Prerequisites

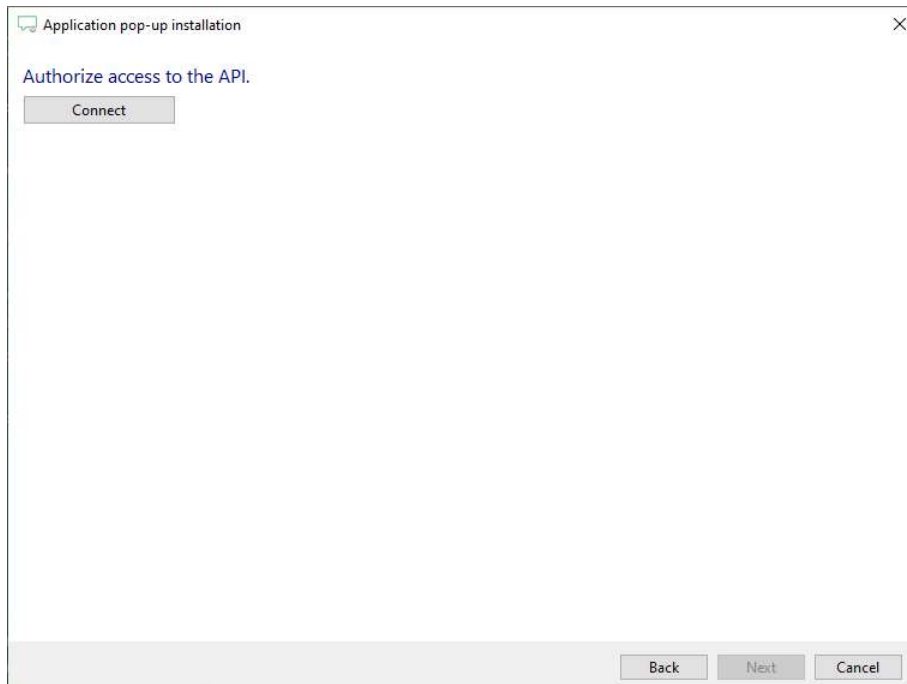
The caller recognition requires access to your data via the Kleos REST API. To allow access to this, the recognition update service must be authorized via OAuth to read Kleos data.

Configuration steps

- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Kleos, 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 window titled 'Application pop-up installation' with a close button (X) in the top right corner. The main heading is 'Client call notification', followed by the instruction: 'Configure the information you want the client to show when a caller is recognized from this set'. Below this is a preview of an 'Incoming call' notification. The preview shows a blue telephone icon on the left and a dark grey box on the right containing the following text: 'Name: DisplayName', 'Email: Email', 'Number: Caller number', and 'Source: Application name'. Below the text in the preview is a grey button labeled 'Open contact'. Underneath the preview, a small note states: '* Windows allows a maximum of 4 lines, and a maximum of 128 characters'. Below this note is a grey button labeled 'Add field'. At the bottom of the window are three buttons: 'Back', 'Next' (which is highlighted with a blue border), and 'Cancel'.

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

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. The main heading is 'Which actions do you want to perform?', followed by the instruction: 'The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.' Below this is a list of actions. The first action is 'Show Contact', which has a document icon to its left and a description: 'Open the automatically generated URL to the caller's CRM page.' To the right of this action is a trash can icon. Below the 'Show Contact' action is a link that says '→ Add a new script' with the subtext 'Choose from a list of predefined scripts or create a custom script'. At the bottom of the window are three buttons: 'Back', 'Next' (which is highlighted with a blue border), and 'Cancel'.

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

