CRM
INFO

How to configure caller recognition and screen-pop for:

Microsoft Business Central

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

Prerequisites

The integration requires access to the API. During the configuration you will be asked to sign in with a valid Microsoft Business Central account.
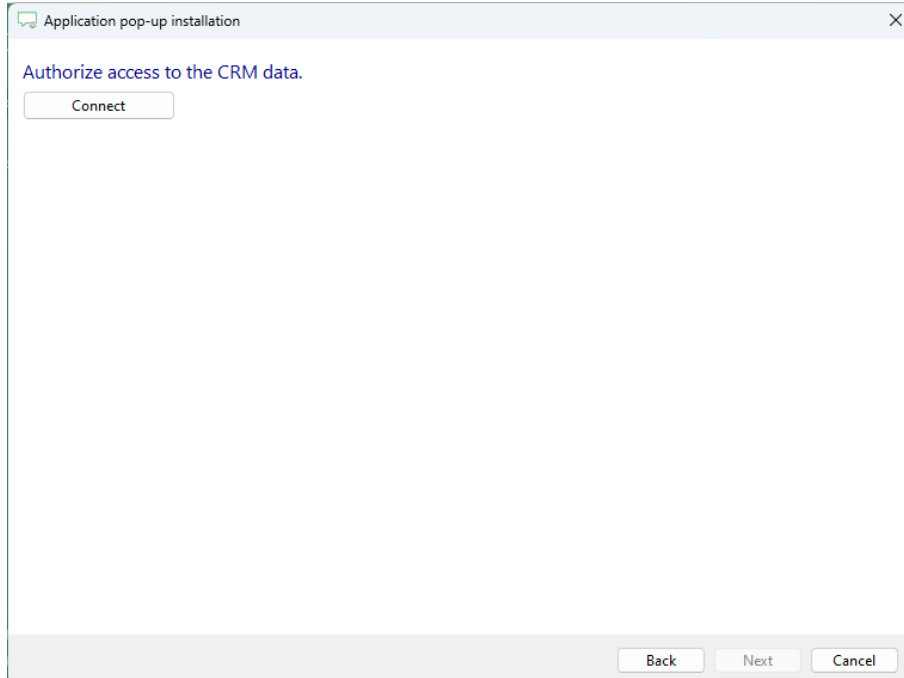
Notes

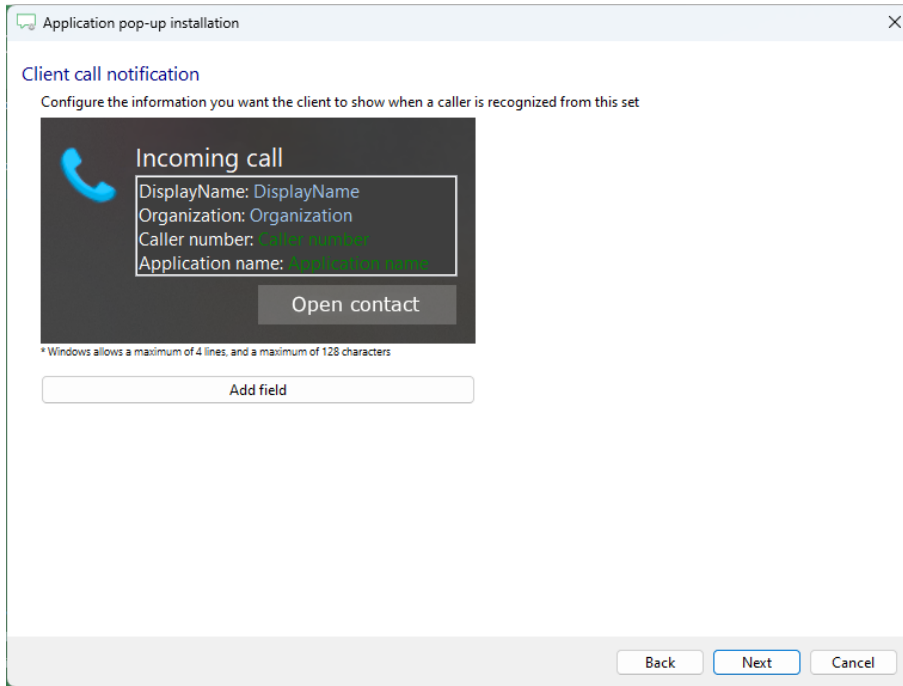Highlighted phone number can automatically be dialed using the hotkey.

Configuraton steps

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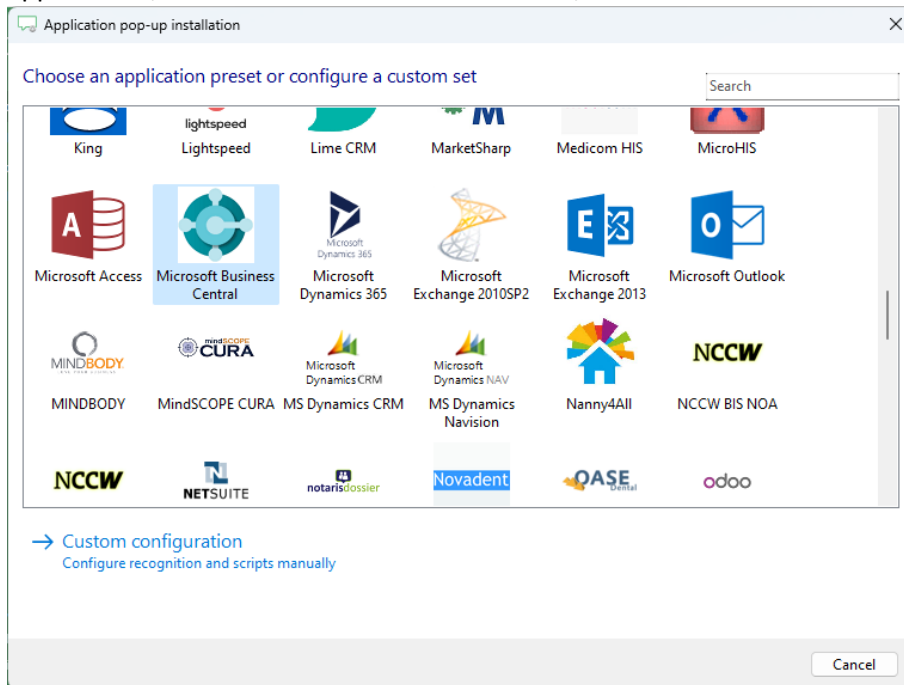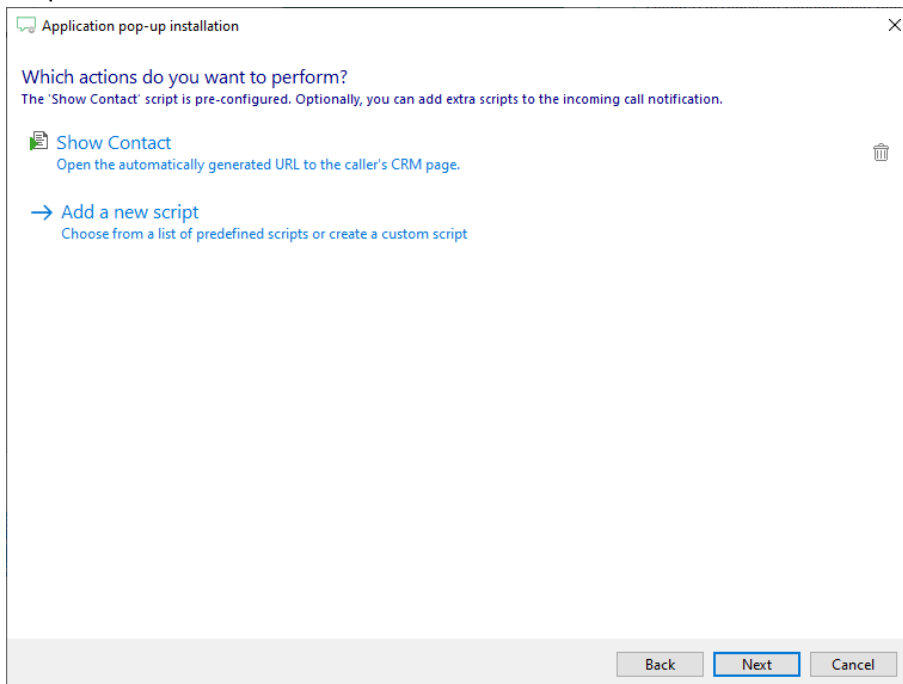

2) Authorize access to the CRM data using the API.

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

Application pop-up installation   ✕

Client call notification

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

📞 Incoming call

DisplayName: DisplayName
Organization: Organization
Caller number: Caller number
Application name: Application name

Open contact

* Windows allows a maximum of 4 lines, and a maximum of 128 characters

Add field

Back   Next   Cancel

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

Application pop-up installation   ✕

Which actions do you want to perform?

The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification.

📄 **Show Contact**   🗑
      Open the automatically generated URL to the caller's CRM page.

→ **Add a new script**
      Choose from a list of predefined scripts or create a custom script

Back   Next   Cancel

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