How to configure caller recognition and screen-pop for:

Moneybird

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

Prerequisites

The caller recognition requires access to your data via the Moneybird REST API. To allow access to this, the Recognition Update service must be authorized via OAuth to read Moneybird data.
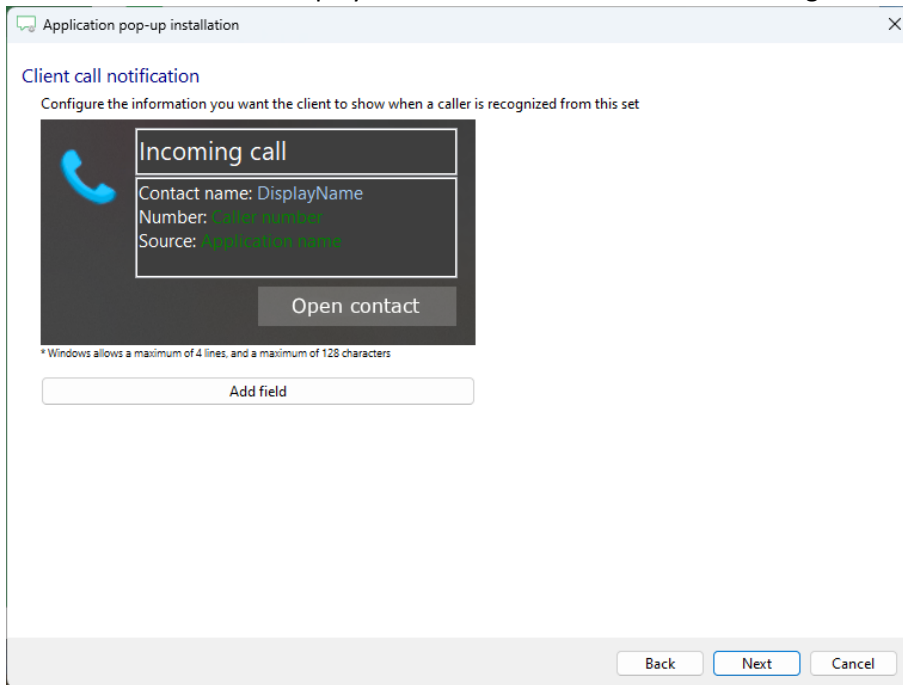
Configuraton steps

1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Moneybird, as shown below.
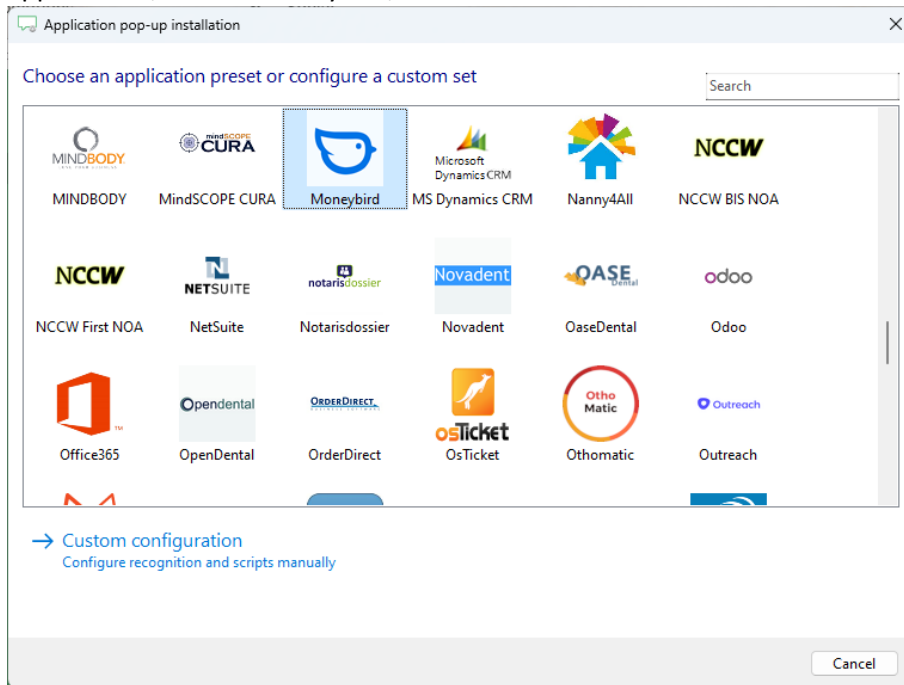
2) Authorize access to the API.
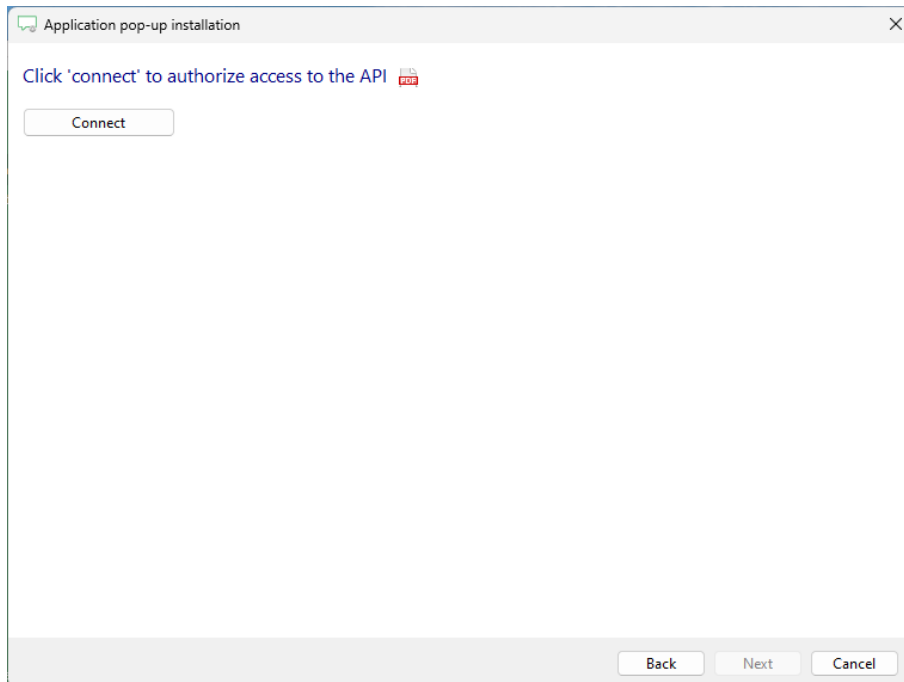
3) Choose which fields to display in the call notification on an incoming call.

Application pop-up installation ✕

Client call notification

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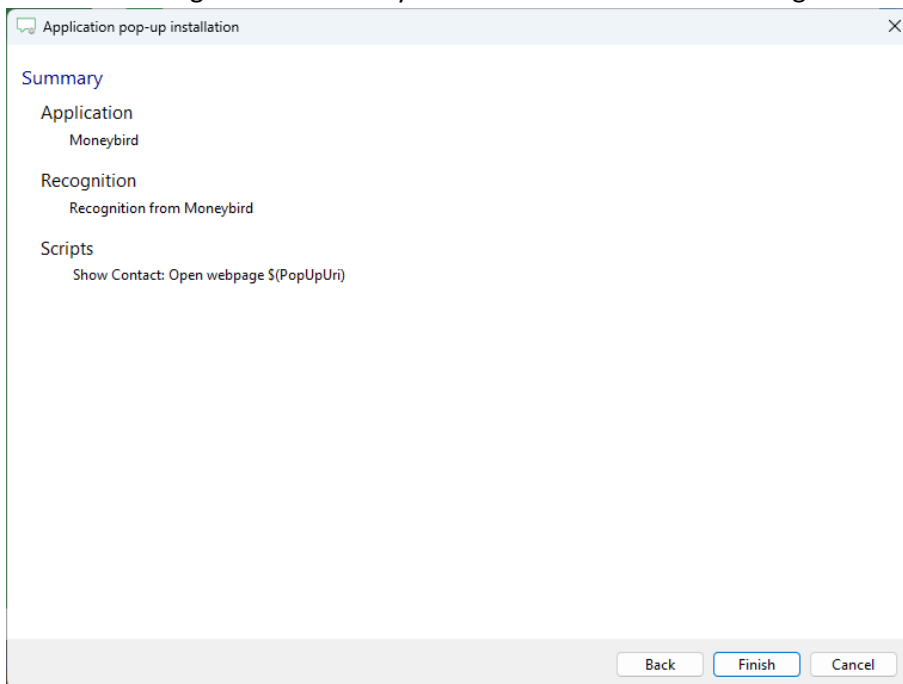
📞 **Incoming call**

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

Open contact

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

Add field

Back Next Cancel

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

Application pop-up installation ✕

Summary
Application
Moneybird

Recognition
Recognition from Moneybird

Scripts
Show Contact: Open webpage $(PopUpUri)

Back Finish Cancel