

How to configure caller recognition and screen-pop for:

## Moneybird

Contact replication method: REST API

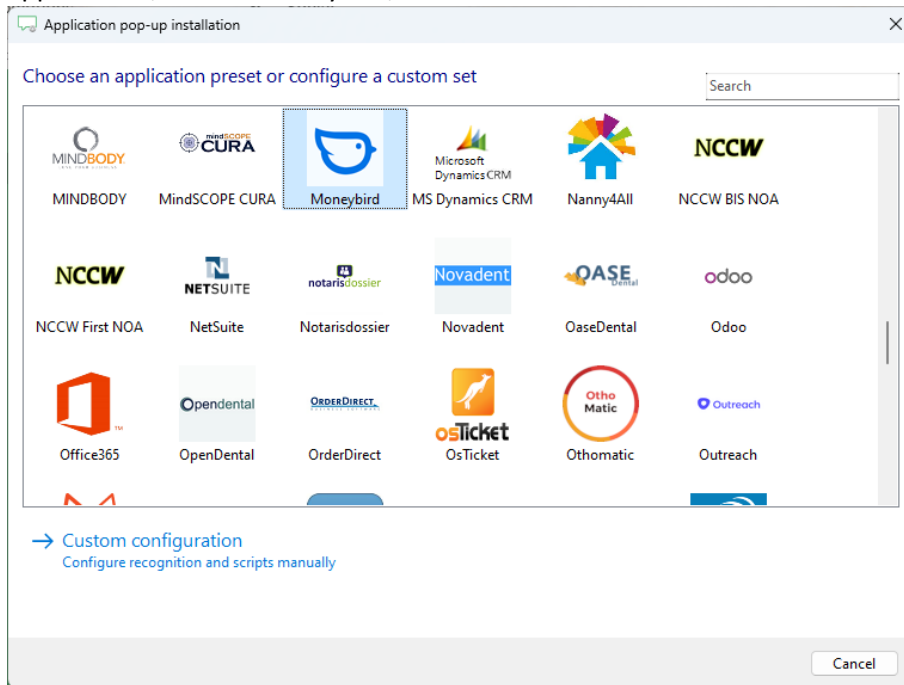
Screen pop method: Generated URL

### Prerequisites

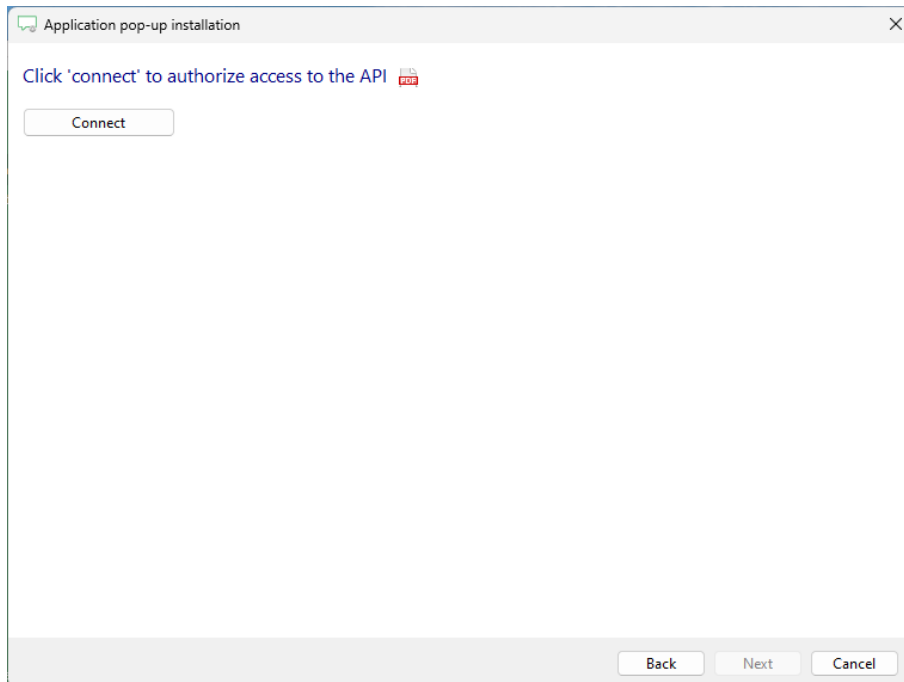
The caller recognition requires access to your data via the Moneybird REST API. To allow access to this, the Recognition Update service must be authorized via OAuth to read Moneybird data.

## Configuraton steps

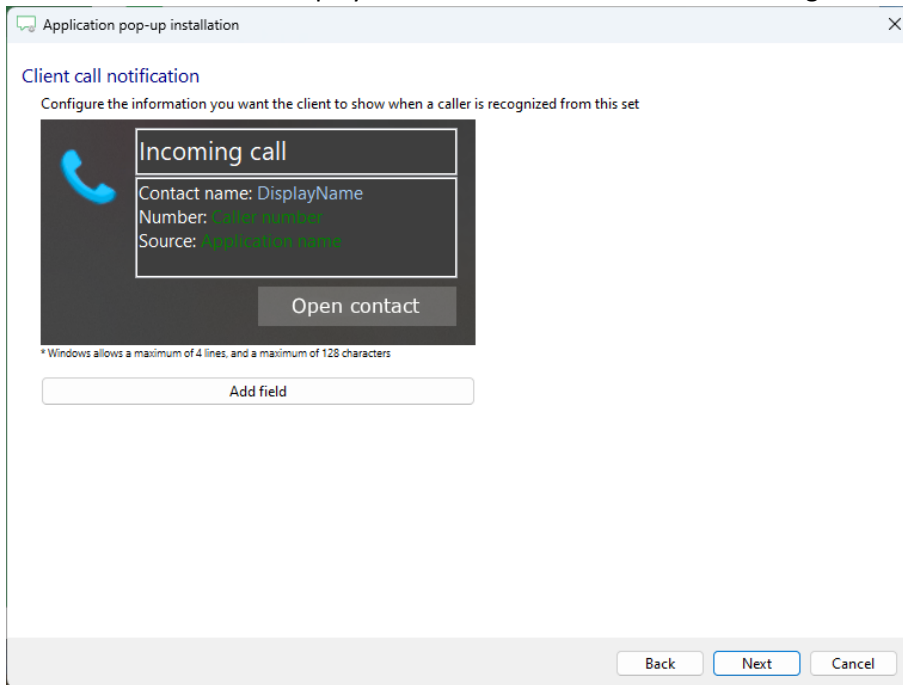
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Moneybird, as shown below.



- 2) Authorize access to the API.



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



The screenshot shows a configuration window titled "Application pop-up installation". The current step is "Client call notification", with the instruction: "Configure the information you want the client to show when a caller is recognized from this set".

A preview of the call notification is shown in a dark box with a blue phone icon. The notification text is:
 

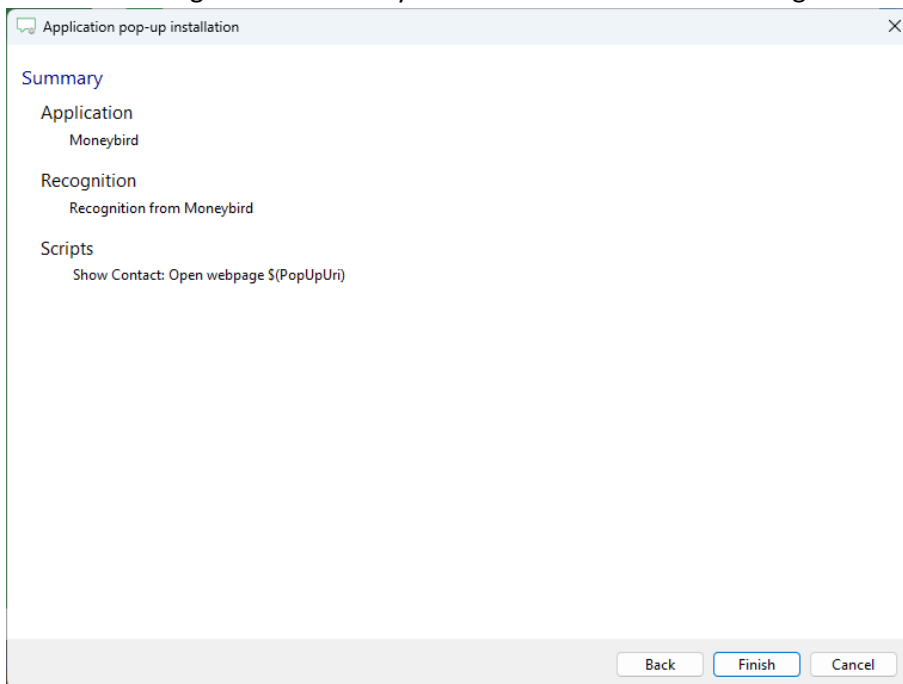
- Incoming call
- Contact name: `DisplayName`
- Number: `Caller number`
- Source: `Application name`

 Below the preview is a button labeled "Open contact".

Below the preview, there is a note: "\* Windows allows a maximum of 4 lines, and a maximum of 128 characters".

At the bottom of the configuration area is an "Add field" button. At the very bottom of the window are "Back", "Next", and "Cancel" buttons.

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



The screenshot shows the "Summary" step of the "Application pop-up installation" dialog. It lists the following configuration details:

- Application:** Moneybird
- Recognition:** Recognition from Moneybird
- Scripts:** Show Contact: Open webpage \$(PopUpUri)

At the bottom of the window are "Back", "Finish", and "Cancel" buttons.