CRM INFO

How to configure caller recognition and screen-pop for:

Outreach

Contact replication method: HTTP REST API Screen pop method: URI

Prerequisites

The Outreach integration uses the Outreach API to synchronize the relevant contact data. To enable this function, the synchronization service must be authorized via OAuth to read Outreach prospects information (<u>OAuth</u> is an open standard for access delegation). In addition, the integration features a script to add call notes. This function requires users to also authenticate the script to add call notes.

Notes

Outbound dialing within Outreach can be done by clicking a prospect's phone number and selecting 'call'.

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Configuration steps

2)

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

		MINDBODY	- 	Microsoft	^
licrosoft Exchange 2013	Microsoft Outlook	MINDBODY	MindSCOPE CURA	Dynamics CRM MS Dynamics CRM	
Microsoft Dynamics NAV	NCCW	NCCW	NETSUITE	notarisdossier	
MS Dynamics Navision	NCCW BIS NOA	NCCW First NOA	NetSuite	Notarisdossier	
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3) Enter your Outreach credentials to access the data from your account. After a successful authorization the wizard automatically proceeds to the next step.

🧔 Outreach authorization	-		×
https://accounts.outreach.io/users/next			
Outreach			
Sign In	_		
test@test.test			
< Back Forgot password? Sign In			
STATUS 1	ERMS	PRIVACY	
This window will close automatically when a token has been received		Close	



4) The 'Show Contact' script is configured automatically. With the 'Add Call Note' script you can optionally configure a URL to your MiaRec domain. If this is filled in, then the link to the recording of the conversation will automatically be added to each call note.

Provide the script na	me and the required parameters	
Optionally, a MiaRec link requires the base URL to y	to the recorded conversation can be added automatically to the call note our MiaRec domain.	when it is added to Outreach. This
Script name	Add Call Note	
Parameters		
Call recording base URL	https://	
Test script		Next Canc
ptionally, add	more scripts, or click 'next' to continue	2.
Application pop-up inst	allation	
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5)



6) Check the configuration summary and click 'Finish' to add the Outreach integration.

http://www.application.com/application/app	×
Summary	
Application	
Outreach	
Recognition	
Recognition from Outreach	
Scripts	
Show Contact: Open webpage \$(PopUpUri) Add Call Note:	
	Back Finish Cancel