

How to configure caller recognition and screen-pop for:

Outreach

Contact replication method: HTTP REST API

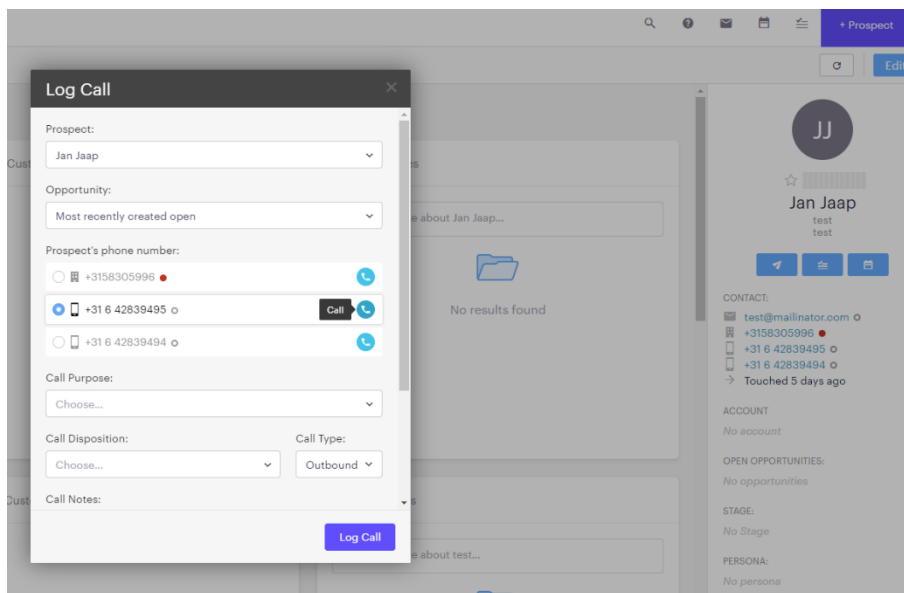
Screen pop method: URI

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 ([OAuth](#) 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.

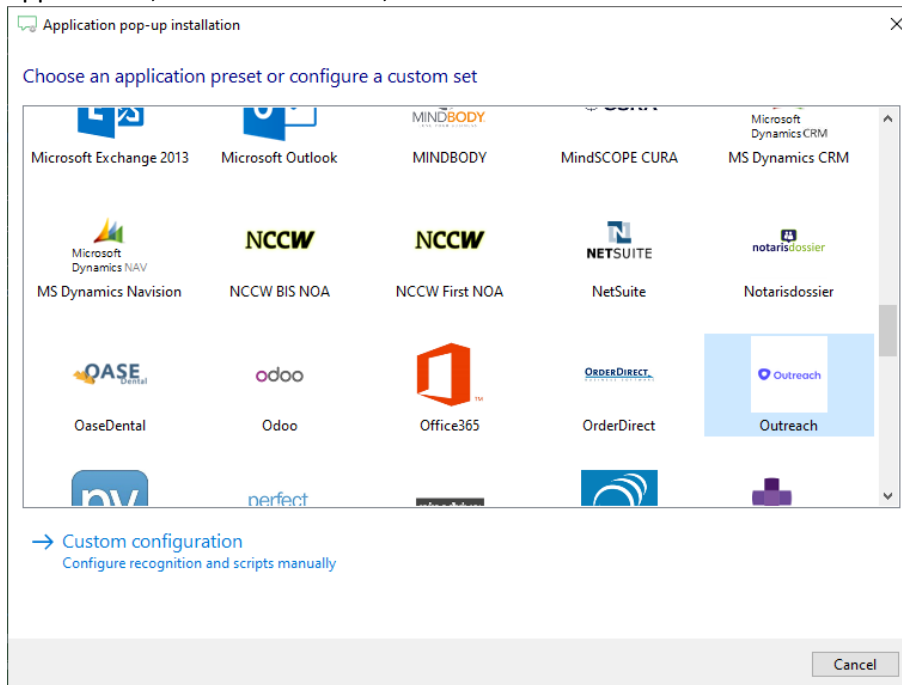
Notes

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

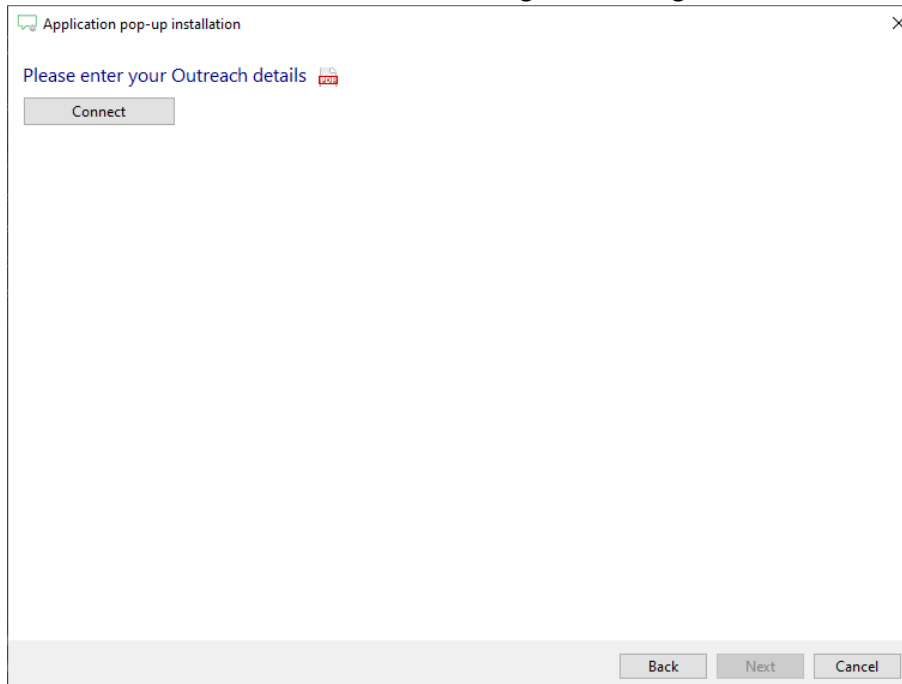


Configuration steps

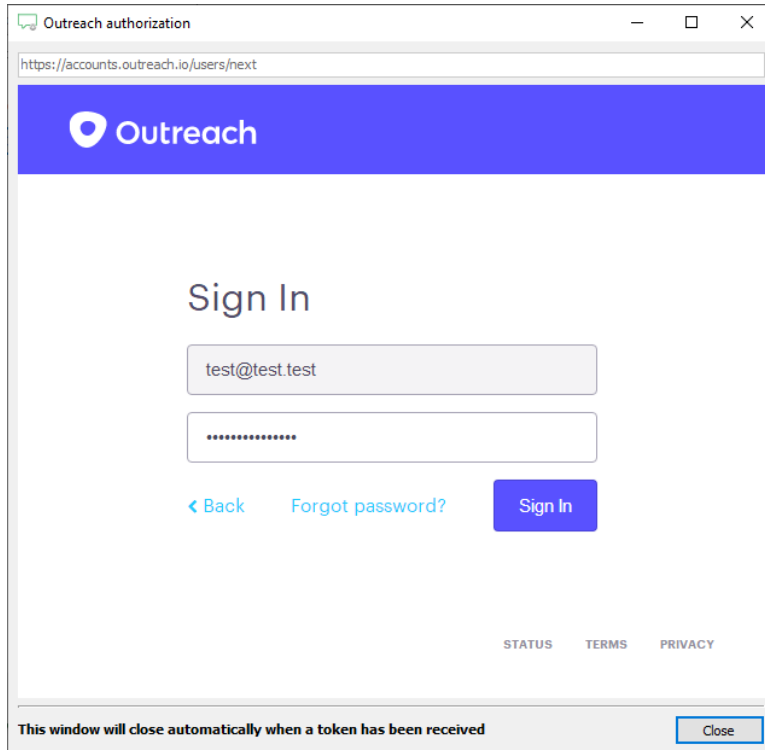
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose 'Outreach', as shown below.



- 2) Connect to Outreach to authorize the Recognition Configuration Tool. Click 'Connect'.

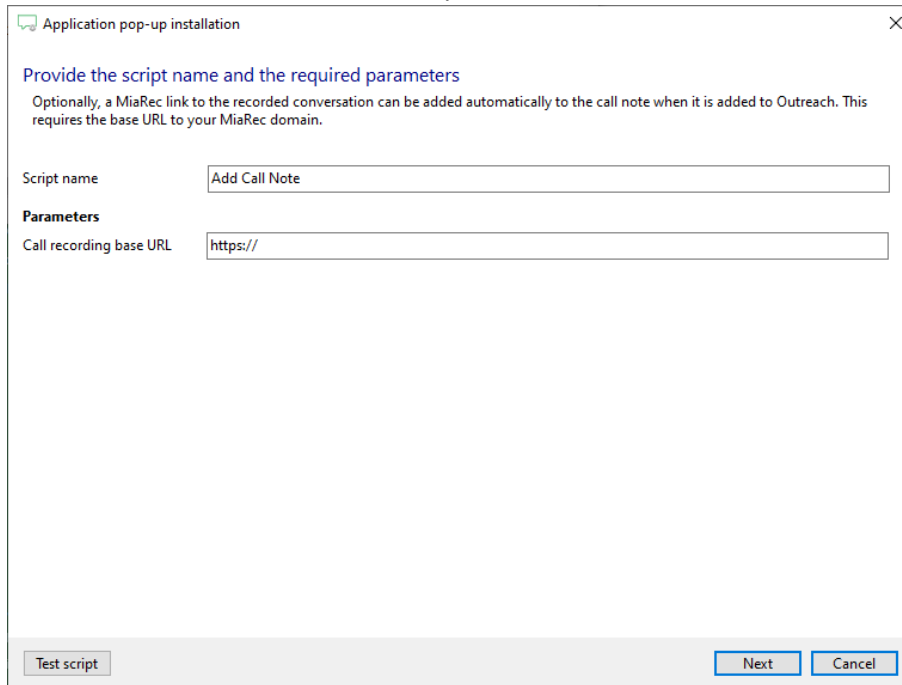


- 3) Enter your Outreach credentials to access the data from your account. After a successful authorization the wizard automatically proceeds to the next step.



The screenshot shows a web browser window titled "Outreach authorization" with the URL "https://accounts.outreach.io/users/next". The page features the Outreach logo at the top. Below the logo, the heading "Sign In" is displayed. There are two input fields: the first contains the email address "test@test.test" and the second is a password field with masked characters. Below the password field, there are three links: "< Back", "Forgot password?", and a blue "Sign In" button. At the bottom of the page, there are links for "STATUS", "TERMS", and "PRIVACY". A footer message states "This window will close automatically when a token has been received" with a "Close" button next to it.

- 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.



Application pop-up installation

Provide the script name and the required parameters

Optionally, a MiaRec link to the recorded conversation can be added automatically to the call note when it is added to Outreach. This requires the base URL to your MiaRec domain.

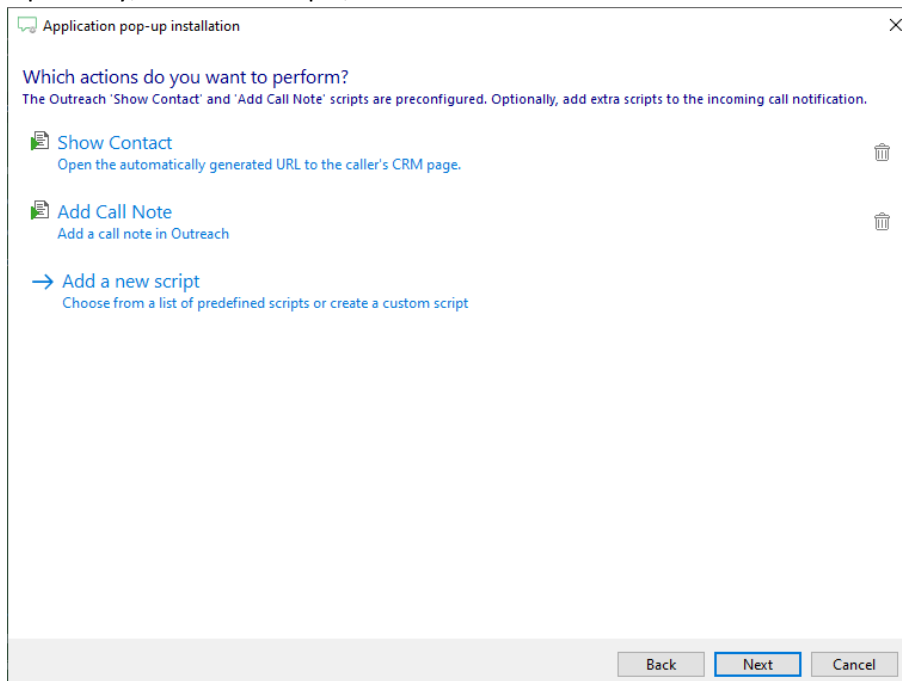
Script name: Add Call Note

Parameters

Call recording base URL: https://

Buttons: Test script, Next, Cancel

- 5) Optionally, add more scripts, or click 'next' to continue.



Application pop-up installation

Which actions do you want to perform?

The Outreach 'Show Contact' and 'Add Call Note' scripts are preconfigured. Optionally, add extra scripts to the incoming call notification.

- Show Contact: Open the automatically generated URL to the caller's CRM page.
- Add Call Note: Add a call note in Outreach.
- Add a new script: Choose from a list of predefined scripts or create a custom script.

Buttons: Back, Next, Cancel

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

