

How to configure caller recognition and screen-pop for:

QuickBase

Contact replication method: API

Screen pop method: Open QuickBase in web page

Prerequisites

None

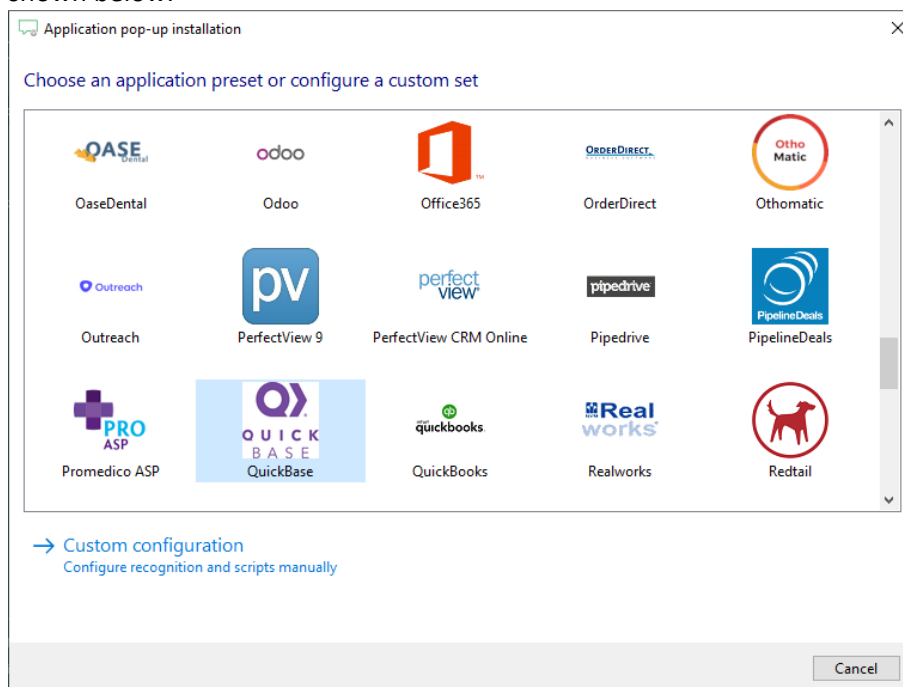
Notes

With the QuickBase integration, the client will open a web page to QuickBase and show the contact page based on the caller's phone number.

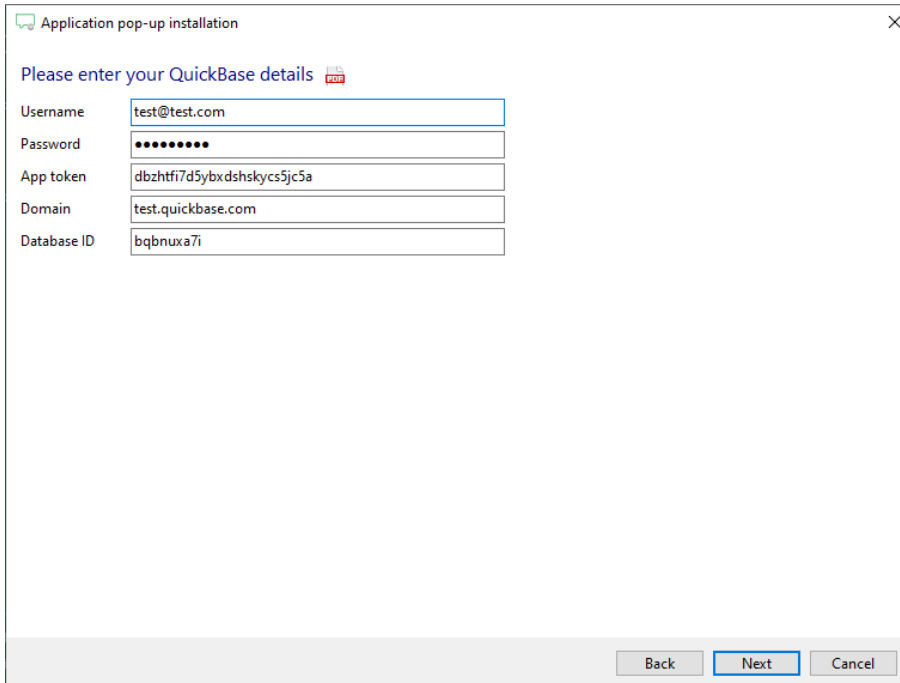
For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

Configuration steps

- 1) Start by clicking 'add application' in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'QuickBase', as shown below.



- 2) The QuickBase integration requires multiple settings in order to retrieve data. Please enter the data in the correct fields.



Application pop-up installation

Please enter your QuickBase details PDF

Username: test@test.com

Password: ••••••••

App token: dbzhtfi7d5ybxdskskycs5jc5a

Domain: test.quickbase.com

Database ID: bqbnuxa7i

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Learn here how to create an app token within an QuickBase application:

https://help.quickbase.com/user-assistance/app_tokens.html

The domain and database ID are obtainable inside the QuickBase application. When the right application is selected, the URL in the browser will show the correct values. See the URL in the screenshot of the browser on the next page for an example.

The URL in the screenshot is:

- <https://test.quickbase.com/db/bqbnuxa7i?a=td>

The domain is: test.quickbase.com

The database ID is: bqbnuxa7i

The screenshot shows the Quickbase web interface. At the top, the browser address bar displays the URL <https://test.quickbase.com/db/bqbnuxa7i?a=td>. The Quickbase logo is in the top left. Below it, a navigation bar includes 'My Apps', 'Test application', and 'New App'. A secondary navigation bar has icons for 'Home', 'Users', 'Records', and 'New Table'. The 'Records' section is active, showing 'Records Home' and a link to 'Reports & Charts'. On the left, a 'FILTERS' sidebar shows a filter for 'first_name' with a note: 'Too many values to use for filtering.' The main area contains a search bar labeled 'Search these records' and a table titled '1-500 of 1006 Records'. The table has columns for 'id', 'first_name', 'last_name', and 'email'. The first row is highlighted.

	id	first_name	last_name	email
<input type="checkbox"/>	1002	Bram	Mobiel	bram@keyl.com
<input type="checkbox"/>	1	Arthur	Arnold	aarnold0@oc.com
<input type="checkbox"/>	2	Juan	Hall	jhall1@mac.com
<input type="checkbox"/>	3	Brian	Gilbert	bgilbert2@oc.com
<input type="checkbox"/>	4	Jack	Lawrence	jlawrence3@oc.com
<input type="checkbox"/>	5	Bobby	Cole	bcole4@oc.com
<input type="checkbox"/>	6	Amanda	Palmer	apalmer5@oc.com
<input type="checkbox"/>	7	Peter	Torre	ptorre6@oc.com

- 3) Some records will be retrieved and shown in order to configure the labels and field types. Please adjust it so every column has an appropriate label and field type. If there is not an appropriate field type, select the field type 'Custom field'. Do not alter the column with label 'PopUpUri', since that column is used for the 'Show Contact' script, which has been pre-configured. Click 'next' to continue after the labels and field types have been configured.

Application pop-up installation

Configure the recognition fields

first name	last name	e-mail	gender	phone number
Custom field	Custom field	Email	Custom field	Phone number
Bram	Mobiel	bram@keylink.yes!	Male	+31652674006
Arthur	Arnold	aarnold0@fda.gov	Male	+316522674006
Juan	Hall	jhall1@macromedia.com	Male	+31612341002
Brian	Gilbert	bgilbert2@creativecommo	Male	+31612341003
Jack	Lawrence	jlawrence3@joomla.org	Male	+31612341004
Bobby	Cole	bcole4@ocn.ne.jp	Male	+31612341005
Amanda	Palmer	apalmer5@huffingtonpost	Female	+31612341006
Peter	Torres	ptorres6@bloomberg.com	Male	+31612341007
Ernest	Peters	epeters7@360.cn	Male	+31612341008
Ryan	Gomez	rgomez8@usa.gov	Male	+31612341009
Amy	Greene	agreene9@hexun.com	Female	+31612341010
Carl	King	ckinga@tinyurl.com	Male	+31612341011
Albert	Elliott	aelliottb@usda.gov	Male	+31612341012
Terry	Stephens	tstephensc@howstuffwork	Male	+31612341013
Christopher	Stewart	cstewartd@china.com.cn	Male	+31612341014
Steven	Morgan	smorgane@hibu.com	Male	+31612341015
Julie	Owens	jowensf@nature.com	Female	+31612341016
Denise	Bell	dbellg@google.ru	Female	+31612341017
Stephen	Wright	swright@nature.com	Male	+31612341018
Nancy	Hamilton	nhamiltoni@buzzfeed.com	Female	+31612341019
John	Coleman	jcolemanj@elpais.com	Male	+31612341020
Brian	Sims	bsimsk@addtoany.com	Male	+31612341021
Harold	Stewart	hstewartl@i2i.jp	Male	+31612341022
Teresa	Gardner	tgardnerm@ehow.com	Female	+31612341023
Paul	Burton	pburtonn@plala.or.jp	Male	+31612341024

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- 4) In step 3 the labels and field types are configured. These can be used to customize the caller recognition when receiving an incoming call. Click on 'Add recognition field' in order to add a label that has been configured in step 3 to the caller recognition. See the screenshot below for an example. Click 'next' after configuring the caller recognition is complete.

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. The main heading is 'Client call notification'. Below it, the instruction reads: 'Configure the information you want the client to show when a caller is recognized from this set'. A text area contains the following information: 'Incoming call', 'Contact name: first name last name', 'Number: Caller number', and 'Email: e-mail'. A note below the text area states: '* Windows allows a maximum of 255 characters'. At the bottom of the text area, there are two buttons: 'Add recognition field' (highlighted with a blue border) and 'Add call field'. At the very bottom of the window, there are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

- 5) The 'Show Contact' script has already been configured. It is possible to add more scripts if desired or click 'next' to continue.

The screenshot shows a window titled 'Application pop-up installation' with a close button (X) in the top right corner. The main heading is 'Which actions do you want to perform?'. Below it, the instruction reads: 'The QuickBase 'Show Contact' script is preconfigured. Optionally, you can add extra scripts to the incoming call notification.' There are two main options: 'Show Contact' (with a document icon) and 'Add a new script' (with a right-pointing arrow icon). The 'Show Contact' option has a sub-description: 'Open the automatically generated URL to the caller's CRM page.' and a trash icon to its right. The 'Add a new script' option has a sub-description: 'Choose from a list of predefined scripts or create a custom script'. At the bottom of the window, there are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

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

