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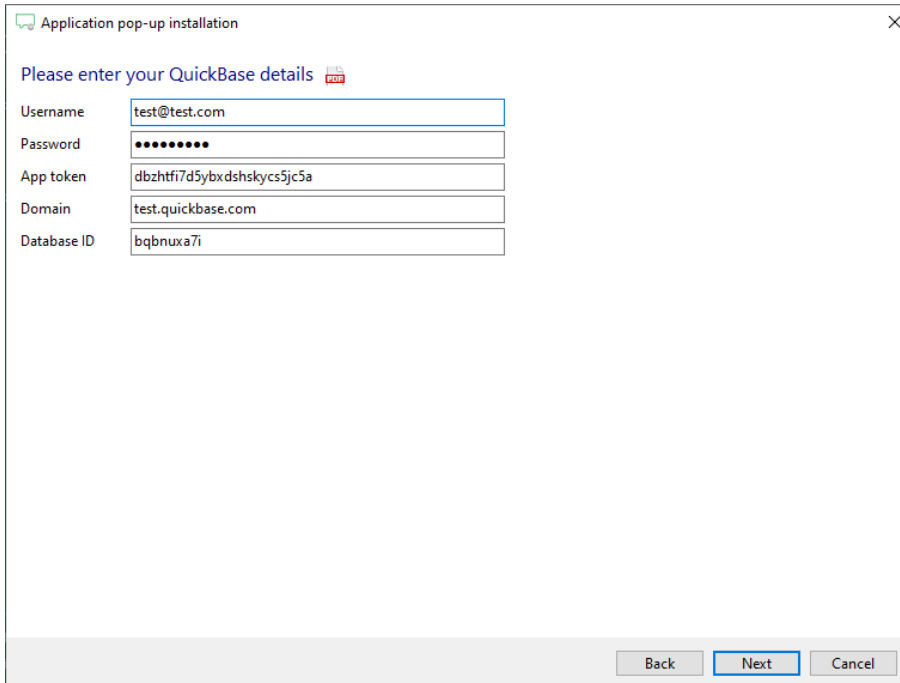For outbound dialing, simply select a phone number and press <Pause> (default hotkey) to dial.

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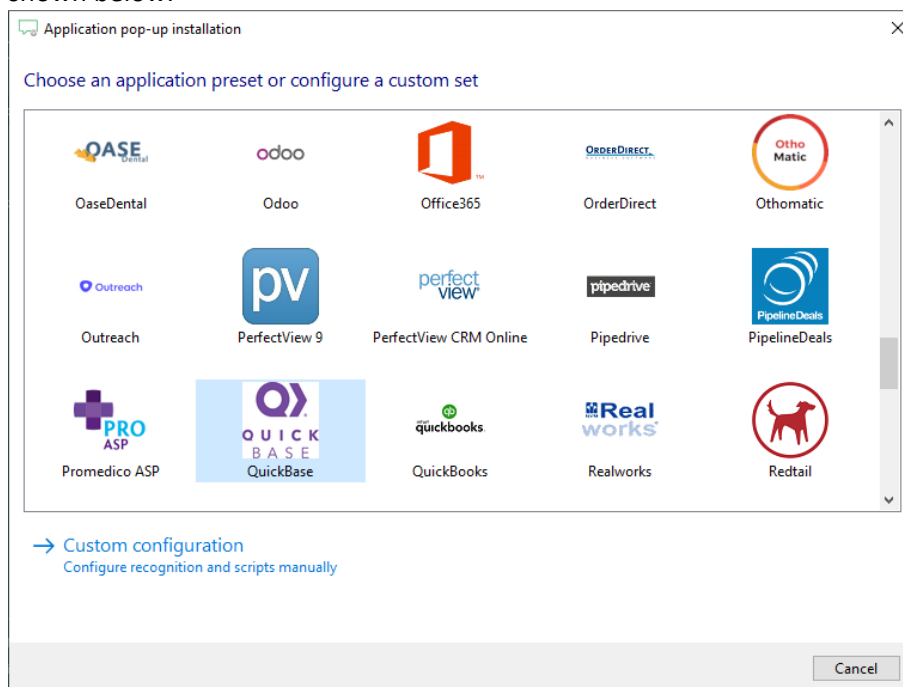
2) The QuickBase integration requires multiple settings in order to retrieve data. Please enter the data in the correct fields.

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

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	swrighth@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

Back   Next   Cancel

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.

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

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

Application pop-up installation   ✕

Summary
   Application
      QuickBase

   Recognition
      Recognition from QuickBase

   Scripts
      Show Contact: Open webpage $(PopUpUri)

                                                    Back   Finish   Cancel