

How to configure caller recognition and screen-pop for:

## QuickBooks

Supported versions: QuickBooks Contact replication method: REST API Screen pop method: Uri

## Prerequisites

The QuickBooks API is used for contact data replication. To enable this, the Recognition Update service must be authorized via OAuth 2.0 to access QuickBooks.



## **Configuration steps**

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'QuickBooks', as shown below.

ORDERDIRECT.	va	perfect	pipedrive	Ì	PRO	
OrderDirect	PerfectView 9	PerfectView CRM Online	Pipedrive	PipelineDeals PipelineDeals	ASP Promedico ASP	
() quickbooks	MReal works	$\bigcirc$		sage CRM	salesfore	
QuickBooks	Realworks	Rosa	RPM Telco	Sage CRM	Salesforce	
SAPAnywhere	V.	S	$\star$			
SAP Anywhere	Sharpspring	Simplicate	SnelStart	SugarCRM 7	SugarCRM Community	
Custom co Configure reci	nfiguration	manually				

2) Connect to QuickBooks to authorize CloudCTI, press "Connect".

Gamma Application pop-up installation	×
Please enter your QuickBooks details 📠	
Connect	
	Back Next Cancel



3) Sign in with your QuickBooks credentials to access the data from your account and click "Connect".

QuickBooks authorization	- 0	
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When you select <b>Connect</b> we will grant CloudCTI acc Online data. This includes: • data about your company, • data about your customers, suppliers, and/or emplo • any updates you may make to your QuickBooks On	cess to your QuickBooks oyees, line data after you connect.	
You can find a list of data here.		
Intuit and CloudCTI may share the information in my II Your relationship to CloudCTI and its use of your info CloudCTI's Terms of Service and Privacy Policy. To lee your data, see our Privacy Statement.	ntuit and CloudCTI accounts. rmation are subject to arn more about how Intuit uses	
Disconnect CloudCTI anytime from your My Apps page	je.	
Cancel	Connect	
window will close automatically when a token has been receive	ed Clos	e

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

onfigure the information you want the client to show when a caller is recognized from this set				
0	Incoming call Contact name: DisplayName Number: Caller number Source: Application name			
Windo	ows allows a maximum of 255 charac	ters Add call field		



## 5) Check the configuration summary and click finish to add the recognition from QuickBooks.

Gamma Application pop-up installation	×
Summary	
Application	
QuickBooks	
Recognition	
Recognition from QuickBooks	
Scripts	
Show Contact: Open webpage \$(PopUpUri)	
	Pack Finish Cancel
	Dack Pinish Cancel