

How to configure caller recognition and screen-pop for:

Redtail

Contact replication method: REST API

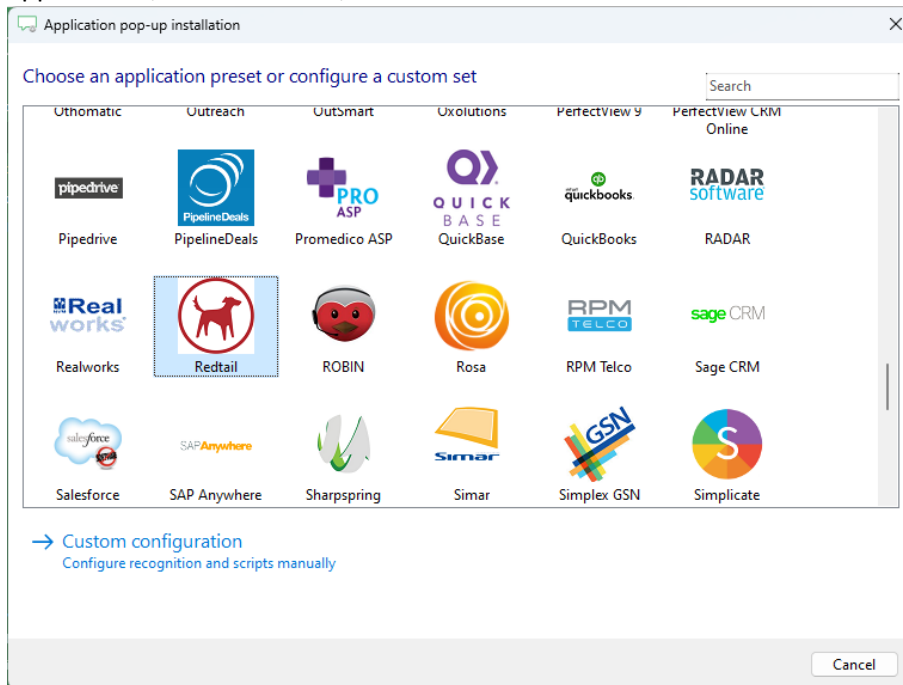
Screen pop method: Generated URL

Prerequisites

The Redtail API is used for contact data replication. To enable this, you need an API Key. If you don't already have one, you can contact the Redtail Sales team to request one.

Configuraton steps

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



- 2) To authorize access to the API, enter your Redtail API key, username and password.

The screenshot shows the same window, but now it's asking for 'Redtail details'. It has three input fields: 'API key', 'Username', and 'Password'. At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.

- 3) After successful authorization the wizard shows the first records. Verify the column types and click 'Next'

The screenshot shows a window titled "Application pop-up installation" with a close button (X) in the top right corner. Below the title bar, the text "Configure the recognition fields" is displayed. The main area contains a table with five columns: Phone, DisplayName, Organization, Email, and Address. Each column has a dropdown menu for selecting the field type. The data rows are as follows:

Phone	DisplayName	Organization	Email	Address
Phone number	Name	Organization	Email	Address
+15551236666	Test3 Contact			
+15551231234	Jane Doe			
+15551234567	TestContact TestName			
+10611112222	Bruce Wayne		bruce@gotham.nl	Wayne Road 1

At the bottom of the window, there are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

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

The screenshot shows a window titled "Application pop-up installation" with a close button (X) in the top right corner. Below the title bar, the text "Client call notification" is displayed. Underneath, it says "Configure the information you want the client to show when a caller is recognized from this set". The main area shows a preview of a call notification window. The preview window has a blue telephone icon on the left and a dark gray background. It contains the following text:

Incoming call

Contact name: DisplayName

Number: Caller number

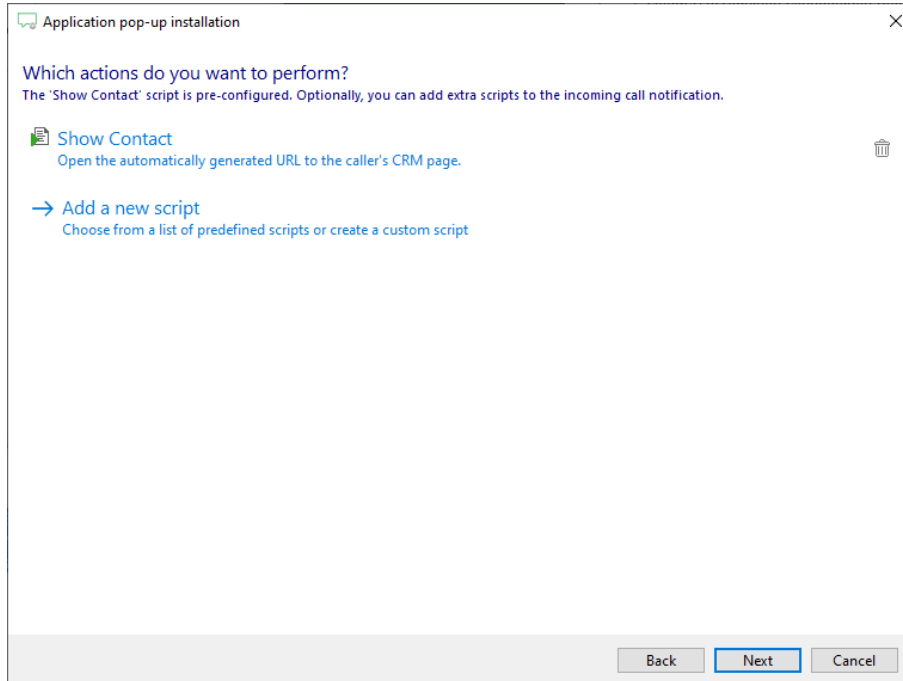
Source: Application name

Open contact

Below the preview, there is a text box labeled "Add field". At the bottom of the window, there are three buttons: "Back", "Next" (highlighted with a blue border), and "Cancel".

* Windows allows a maximum of 4 lines, and a maximum of 128 characters

- 5) The 'Show Contact' script is pre-configured. You can add extra scripts or replace the 'Show Contact' script.



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

