

How to configure caller recognition and screen-pop for:

Simplicate

Contact replication method: API Screen pop method: URL

Prerequisites

The software requires access to the Simplicate API. Log on as administrator, go to "Settings > API" then select "New" to add an API token, which consists of an API key and API secret.

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8	API tokens						+	Nieuw
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Ø		Aangemaakt doo	r API key	 API sec 	cret	• Verloopt op	Max. aanvragen p/min	
≫	Ev		IHsFY8gy36gSozk2UjFY8gy36g	jTjGUP3s mmXbk	4zd1FWf577QgFtEkXbk4zd1FV	Wf5	240	
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Notes

Outbound dialing from Simplicate is enabled by default. Click on a phonenumber, presented as hyperlink, or press the dial-button next to a phone number field to dial.

Hyperlink:

Naam bedrijf	Bezoekadres	Contactgegevens	Soort relatie
Custom Service Co.	Nederland	www.customsvc.com +31 013 456 7899	Klant



Dial button:

Algemene gege	evens	
Relatie soort	Klant	•
Naam bedrijf	Custom Service Co.	Q
Nummer KvK		
E-mail		
Telefoon	+31 013 456 7890	- cho
Website	www.customsvc.com	۲
Notitie		

Bezoekadres

Land Adres Postcode Plaatsnaam

Nederland 🗸

Postadres

Ongelijk aan bezoekadres 

Configuraton steps

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

1	perfect view	pv	Ĩ	PRO
Office365	PerfectView CRM Online	PerfectView9	PipelineDeals PipelineDeals	ASP Promedico ASP
≋Real works	suleyGre		S	
Realworks	Salesforce	Search Online	Simplicate	SugarCRM 7
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2) Enter your Simplicate URL (https://<yourdomain>.simplicate.nl), API key and API secret to access the data from your account.

Q Application	pop-up installation	×
Please enter	r your Simplicate details 📷	
URL	https://mydomain.simplicate.nl/	
Api key		
Api secret		
		Back Next Cancel



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

Application po	op-up installation	×
Client call no	tification	
Configure the	Information you want the client to show when a caller is recognized from this set	
•	Incoming call	
~	Contact name: Name Organization: Organization Number: Source:	
	Open contact	
* Windows allows a	a maximum of 4 lines, and a maximum of 128 characters	
	Add field	
	Back Next Cancel	ן

4) The 'Show Contact' and 'Register Call' script are preconfigured. Optionally, you can add extra scripts.

Application pop-up installation	×
Which actions do you want to perform? The 'Show Contact' and 'Register call scripts are pre-configured. Optionally, you can add extra scripts to the incoming call notification.	
Show Contact Open the automatically generated URL to the caller's CRM page.	Ŵ
Register Call Register calls with the call timeline API.	Ŵ
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next Can	cel



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

C Application pop-up installation	×
Summary	
Application	
Simplicate	
Recognition	
Recognition from Simplicate	
Scripts	
Show Contact: Open webpage \$(PopUpUri) Register Call:	
Back	Finish Cancel