

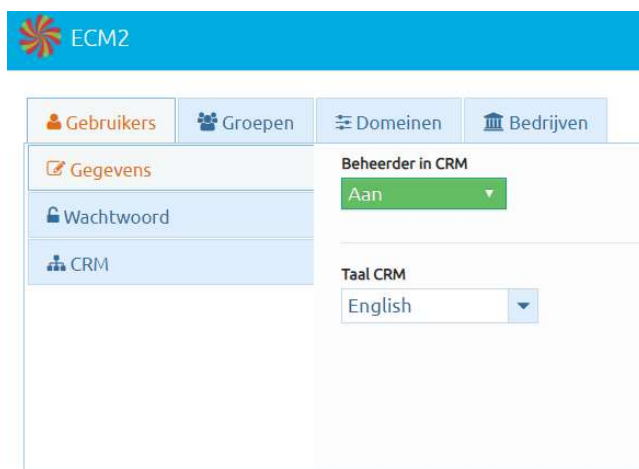
How to configure caller recognition and screen-pop for:

Suite CRM Online

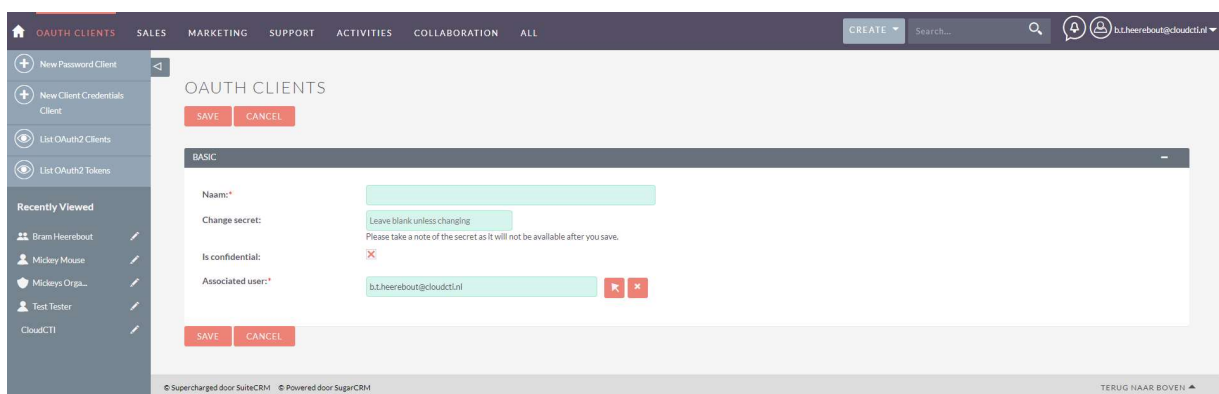
Supported versions: Suite CRM Online
 Contact replication method: REST API
 Screen pop method: URI

Prerequisites

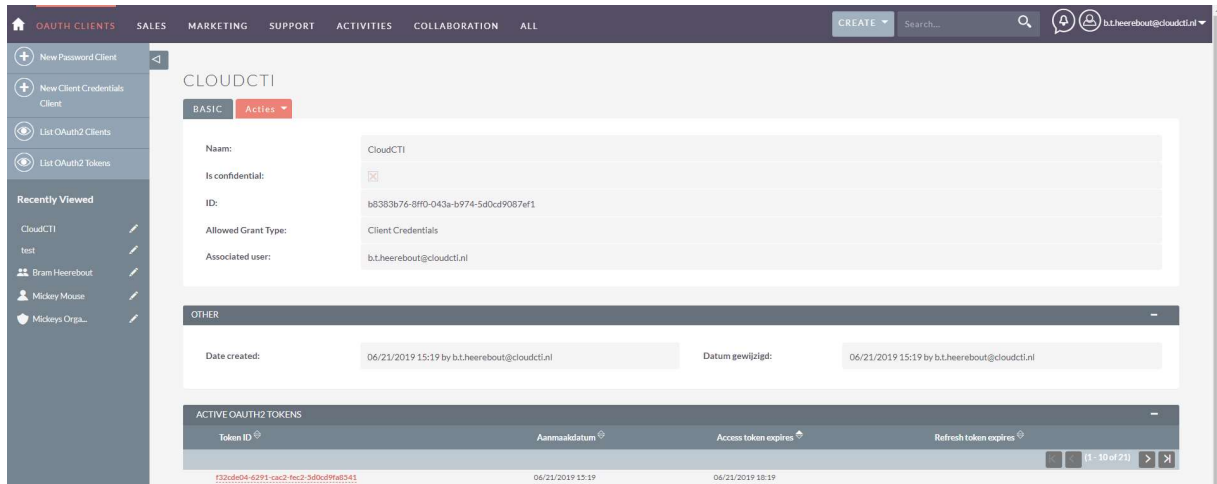
The Suite CRM Online API is used for contact data replication. To use this, you need a client ID and a client secret. To create an OAuth client, you'll have to be admin in Suite CRM.



When you are admin you can find the administration settings by hovering over your email address in the top right corner of Suite CRM and clicking on 'Admin'. Here you can find the 'OAuth2 Clients and Tokens', where you can set up a new OAuth client. Click on 'New Client Credentials Client', fill in the 'Name' and the 'Change secret' fields. Remember the secret you have filled in as this is the client secret you need. Click on 'Save' to continue.



You can now see your new OAuth client. The ID field is the client ID you need.



The screenshot shows a web interface for managing OAuth clients. The main content area displays the configuration for a client named "CloudCTI".

Client Details:

- Naam:** CloudCTI
- Is confidential:**
- ID:** b8383b76-8f0-043a-b974-5d0cd9087ef1
- Allowed Grant Type:** Client Credentials
- Associated user:** b.theerebout@cloudcti.nl

OTHER

- Date created:** 06/21/2019 15:19 by b.theerebout@cloudcti.nl
- Datum gewijzigd:** 06/21/2019 15:19 by b.theerebout@cloudcti.nl

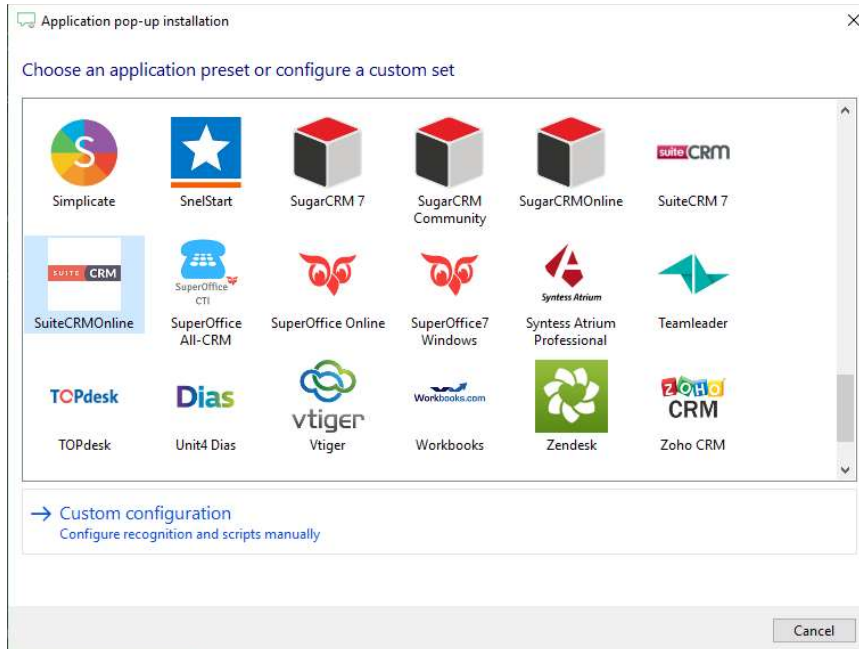
ACTIVE OAUTH2 TOKENS

Token ID	Aanmaakdatum	Access token expires	Refresh token expires
f32cde04-6291-cac2-fec3-3d0cd9fa8341	06/21/2019 15:19	06/21/2019 18:19	

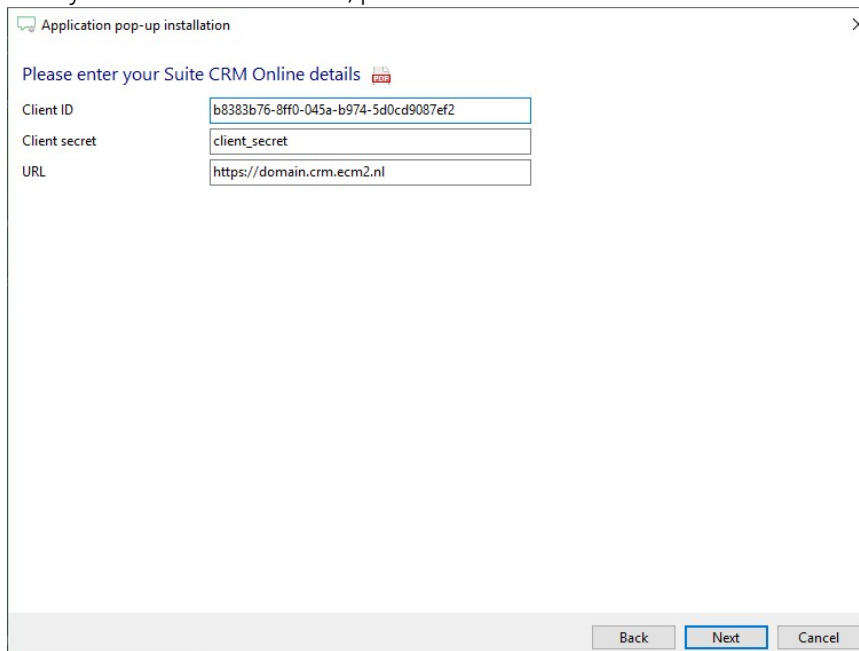
The interface includes a sidebar with navigation options like "New Password Client", "New Client Credentials Client", "List OAuth2 Clients", and "List OAuth2 Tokens". The top navigation bar includes "OAUTH CLIENTS", "SALES", "MARKETING", "SUPPORT", "ACTIVITIES", "COLLABORATION", and "ALL".

Configuration steps

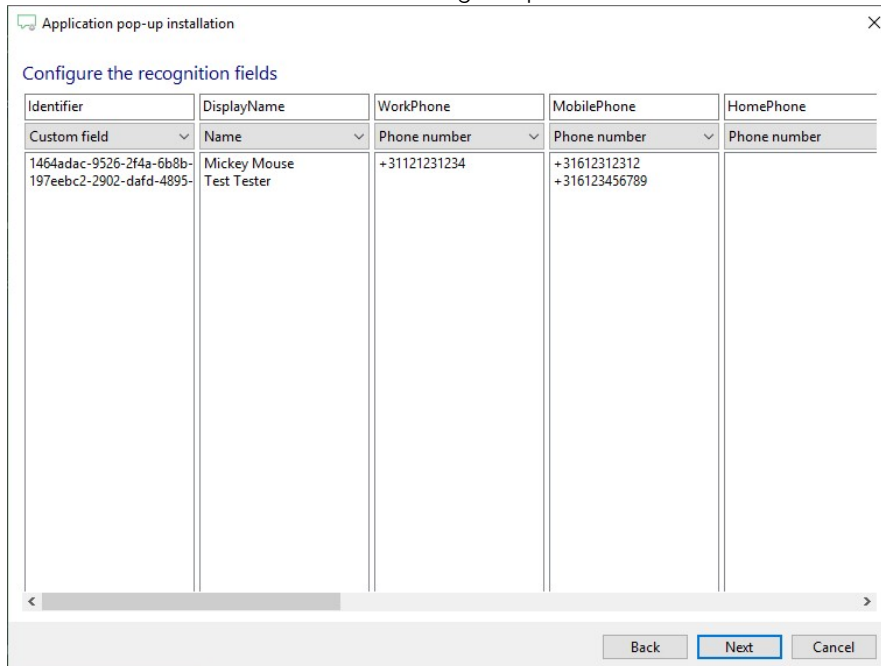
- 1) Start by clicking 'add recognition' in the [Recognition Configuration Tool](#) (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Suite CRM Online', as shown below.



- 2) Enter your Suite CRM Online Client ID, Client Secret and your Suite CRM URL to authorize the synchronization service, press "Next".



- 3) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.



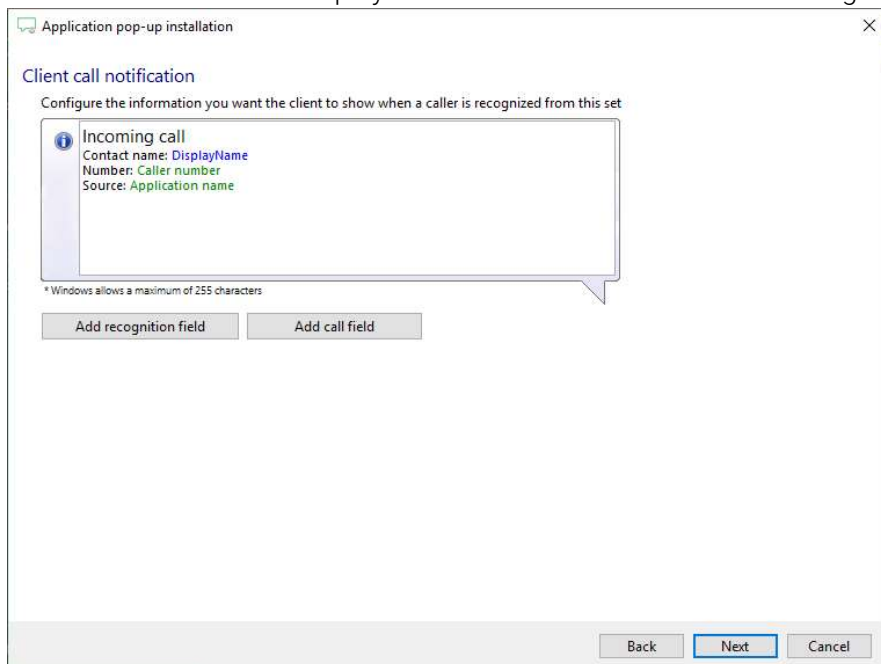
Application pop-up installation

Configure the recognition fields

Identifier	DisplayName	WorkPhone	MobilePhone	HomePhone
Custom field	Name	Phone number	Phone number	Phone number
1464adac-9526-2f4a-6b8b-197eebc2-2902-dafd-4895-	Mickey Mouse Test Tester	+31121231234	+31612312312 +316123456789	

Back Next Cancel

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



Application pop-up installation

Client call notification

Configure the information you want the client to show when a caller is recognized from this set

Incoming call

Contact name: **DisplayName**

Number: **Caller number**

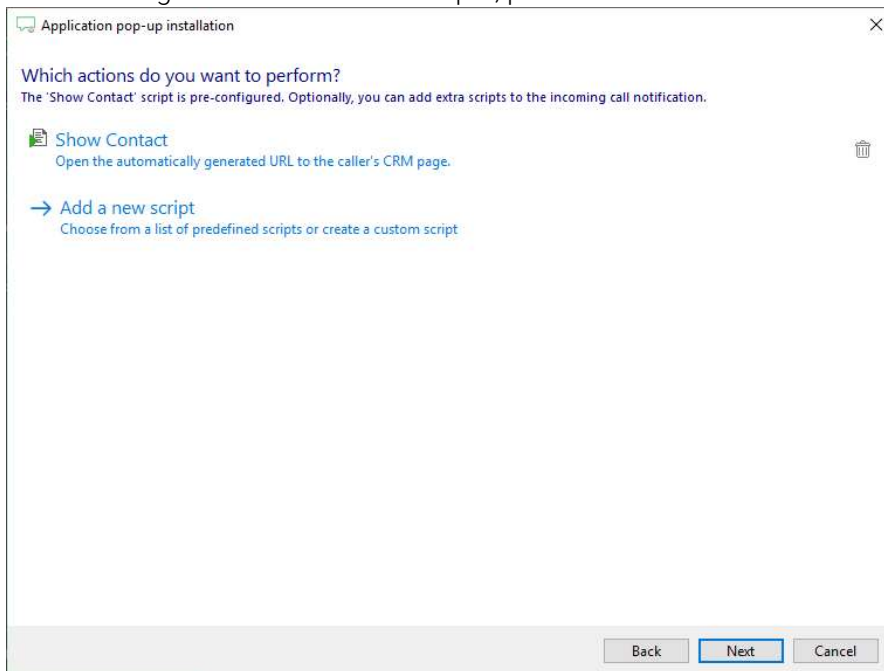
Source: **Application name**

* Windows allows a maximum of 255 characters

Add recognition field Add call field

Back Next Cancel

5) You can change or add additional scripts, press 'Next' to continue.



6) Check the configuration summary and click finish to add the recognition from Suite CRM Online.

