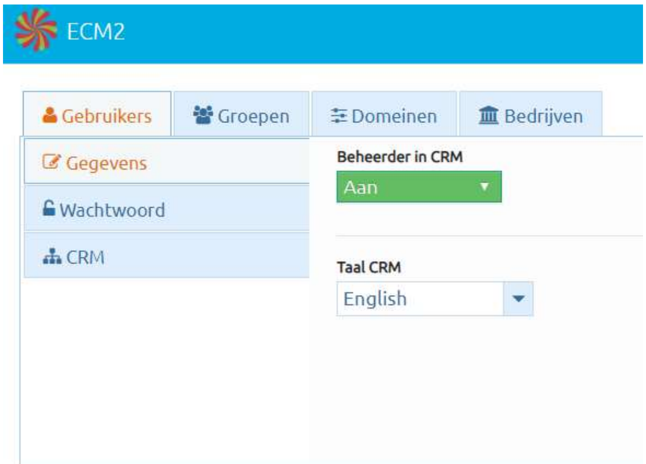
How to configure caller recognition and screen-pop for:

Suite CRM Online

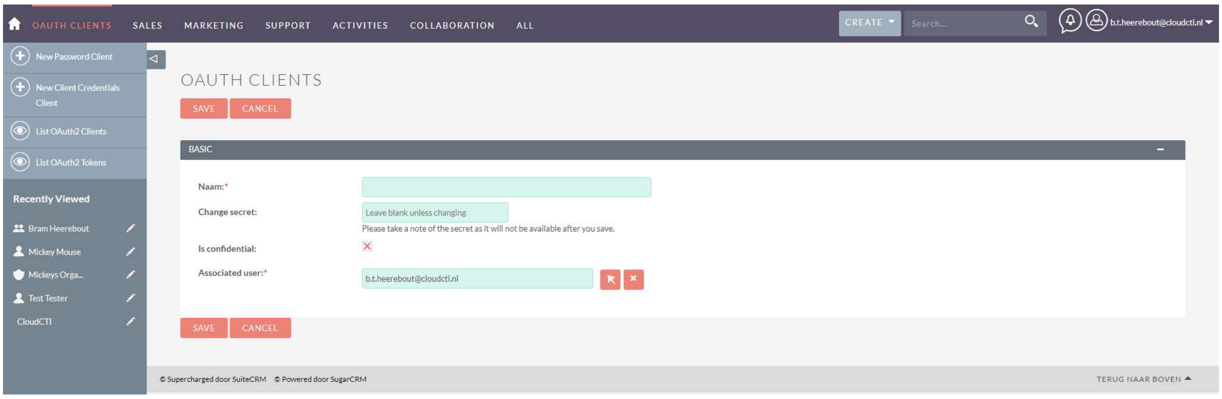
Supported versions: Suite CRM Online
Contact replication method: REST API
Screen pop method: URI

Prerequisites

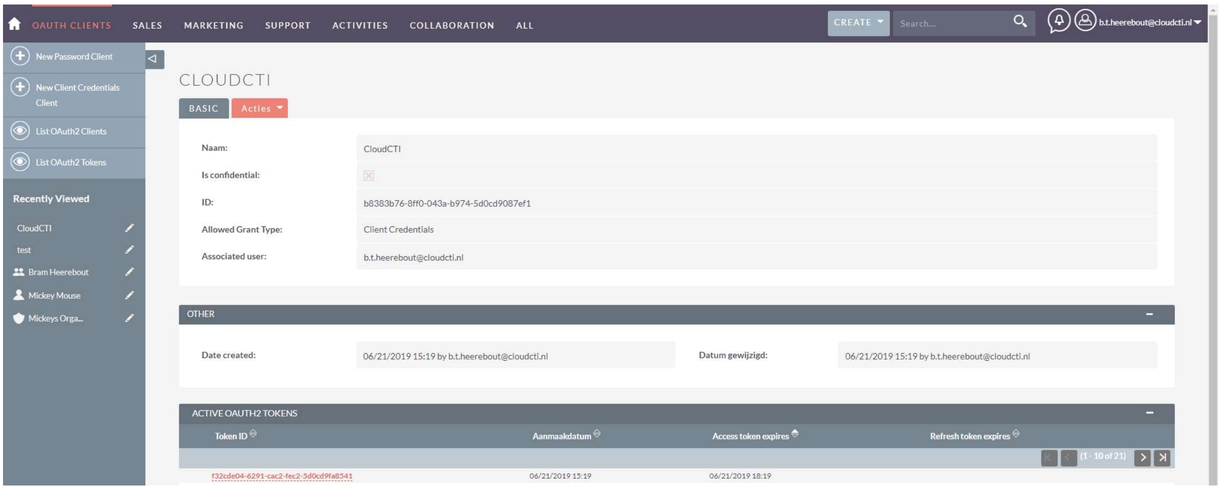
The Suite CRM Online API is used for contact data replication. To use this, you need a client ID and a client secret. To create an OAuth client, you'll have to be admin in Suite CRM.



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.

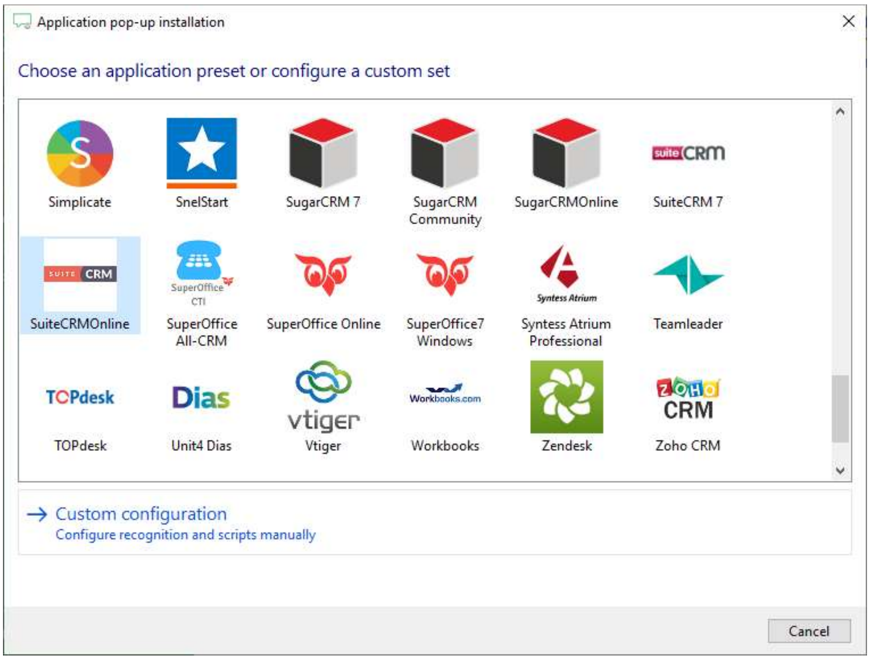


You can now see your new OAuth client. The ID field is the client ID you need.

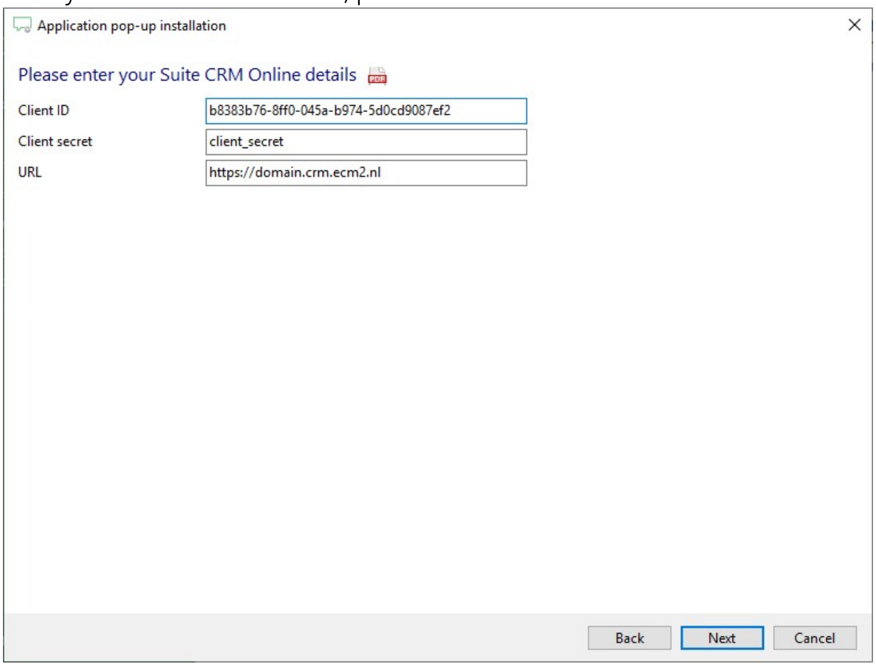


Configuration steps

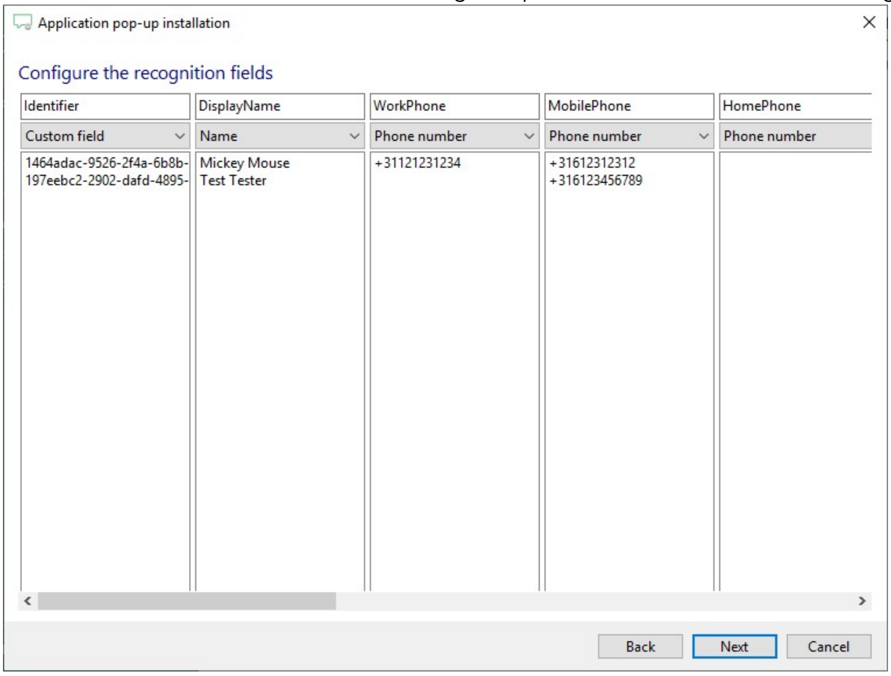
1) Start by clicking 'add recognition' in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Suite CRM Online', as shown below.



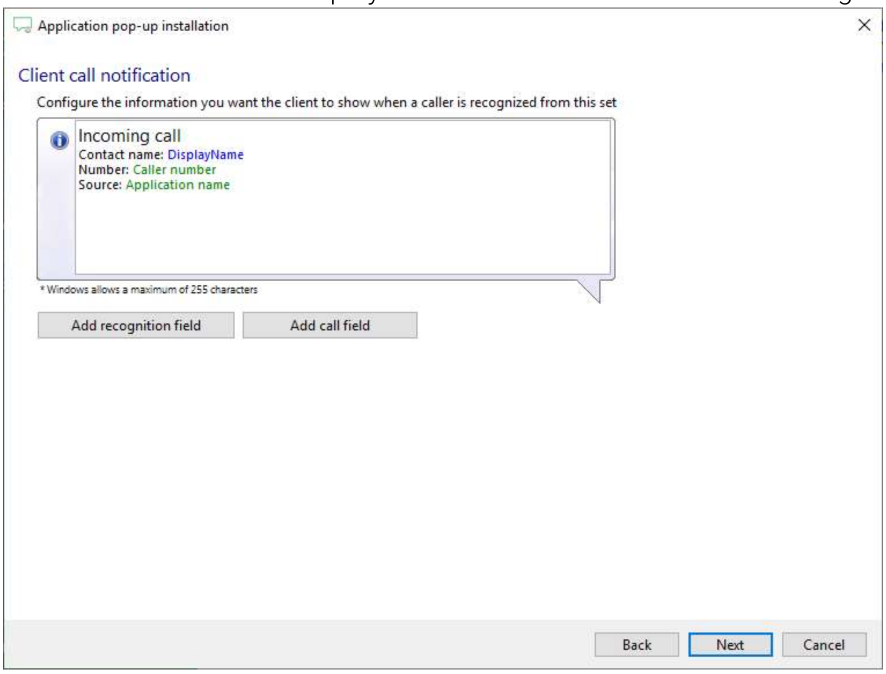
2) Enter your Suite CRM Online Client ID, Client Secret and your Suite CRM URL to authorize the synchronization service, press "Next".



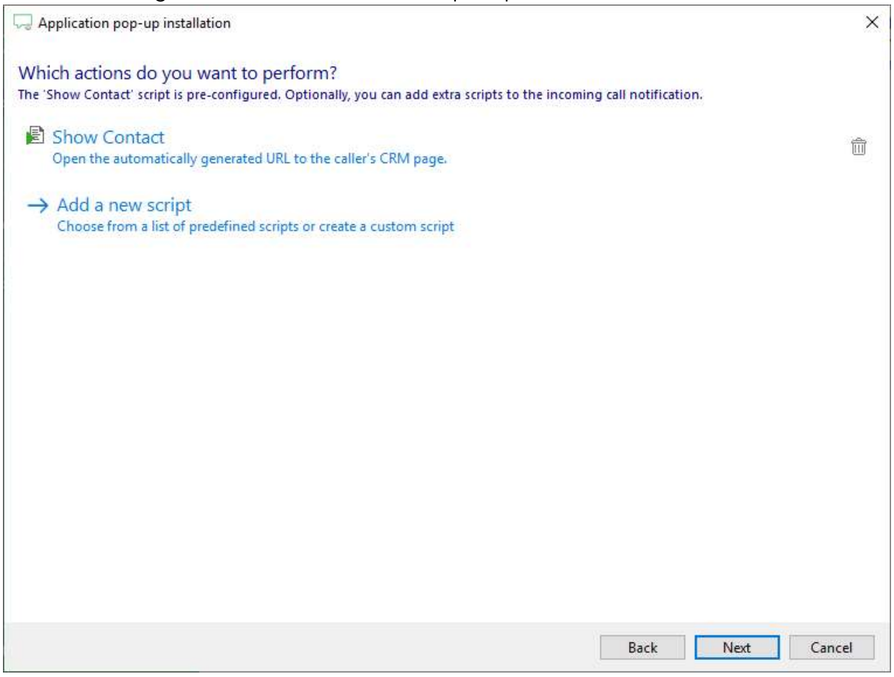
3) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.



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



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.