How to configure caller recognition and screen-pop for:

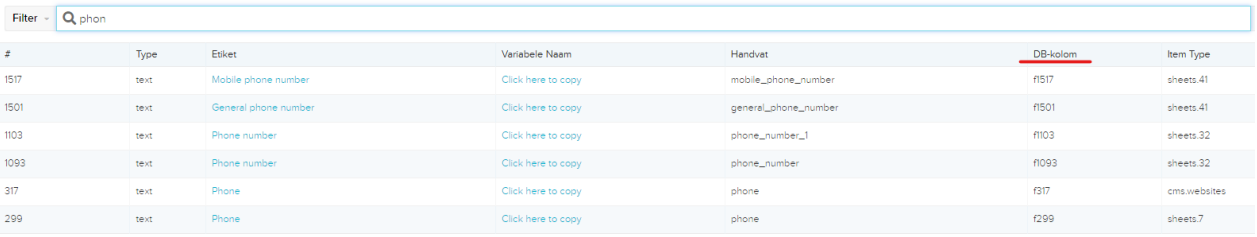
The Office Manager

Contact replication method: REST API
Screen pop method: Generated URL

Prerequisites

Access to the API requires two tokens, the Tenant Token which identifies your company in the system and the User Token which identifies the user with the API. These tokens can be requested from The Office Manager support. To generate the deep links for the screen pop URL's, you will also need to fill in your domain, e.g. https://**yourcompany**.tomtoday.com.

The Office Manager has a set of contact objects by default but is easy to customize. If you have created custom phone number fields, then the wizard can automatically detect them. Nevertheless, some phone number fields may be missed, for example if their field type is "text" instead of "phone". Then you can look up the correct DB columns manually here: https://yourcompany.tomtoday.com/settings/fields


Filter phon

#	Type	Etiket	Variabele Naam	Handvat	DB-kolom	Item Type
1517	text	Mobile phone number	Click here to copy	mobile_phone_number	f1517	sheets.41
1501	text	General phone number	Click here to copy	general_phone_number	f1501	sheets.41
1103	text	Phone number	Click here to copy	phone_number_1	f1103	sheets.32
1093	text	Phone number	Click here to copy	phone_number	f1093	sheets.32
317	text	Phone	Click here to copy	phone	f317	cms.websites
299	text	Phone	Click here to copy	phone	f299	sheets.7

Notes

For outbound dialing, select a phone number and use the dial hotkey.

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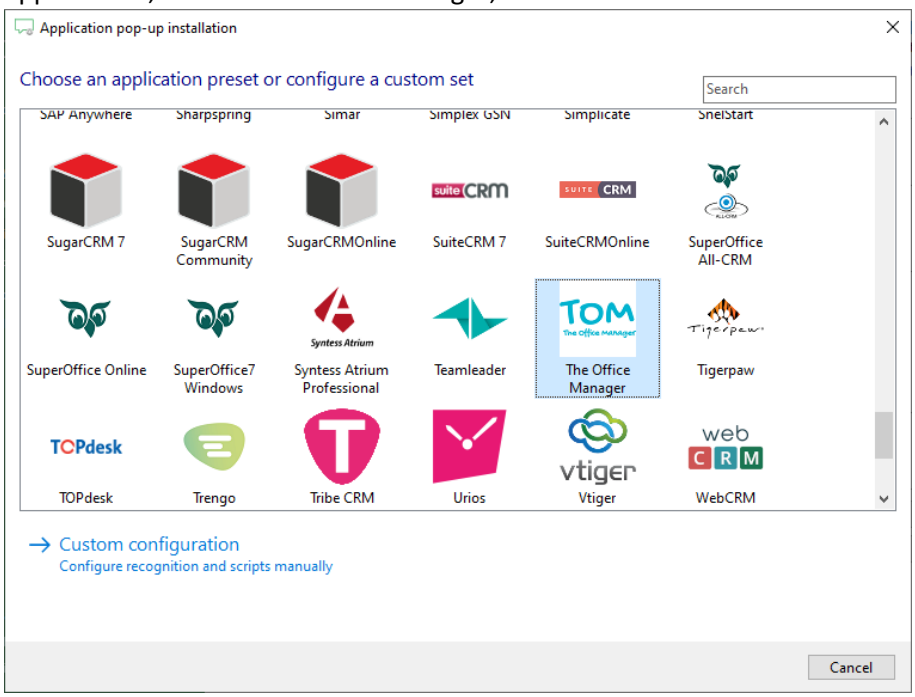
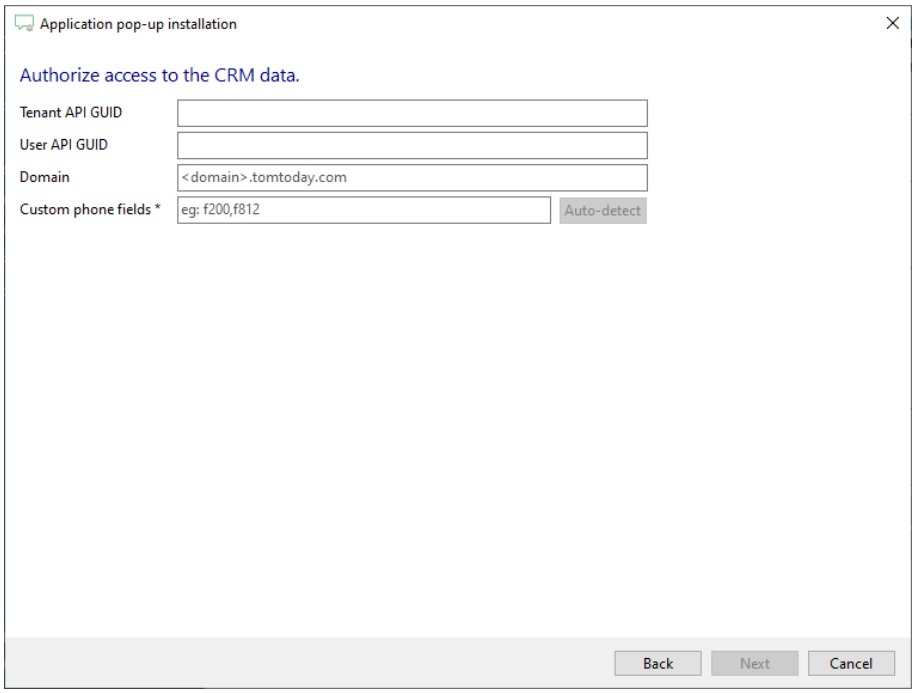
Configuraton steps

1) Start by clicking ‘Add application’ in the Recognition Configuration Tool. From the list of applications, choose The Office Manager, as shown below.



2) Authorize access to the API.



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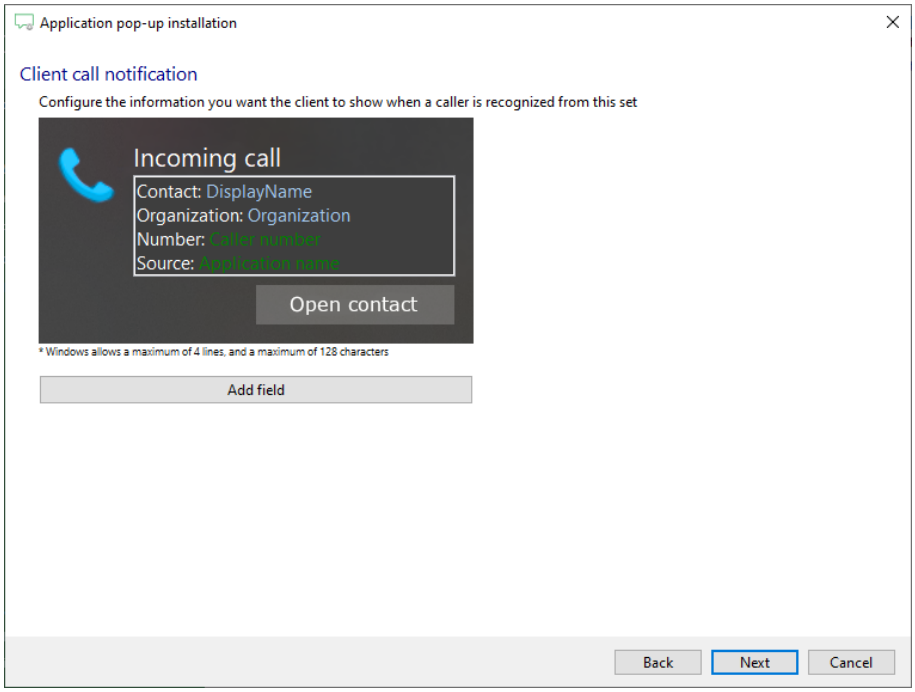
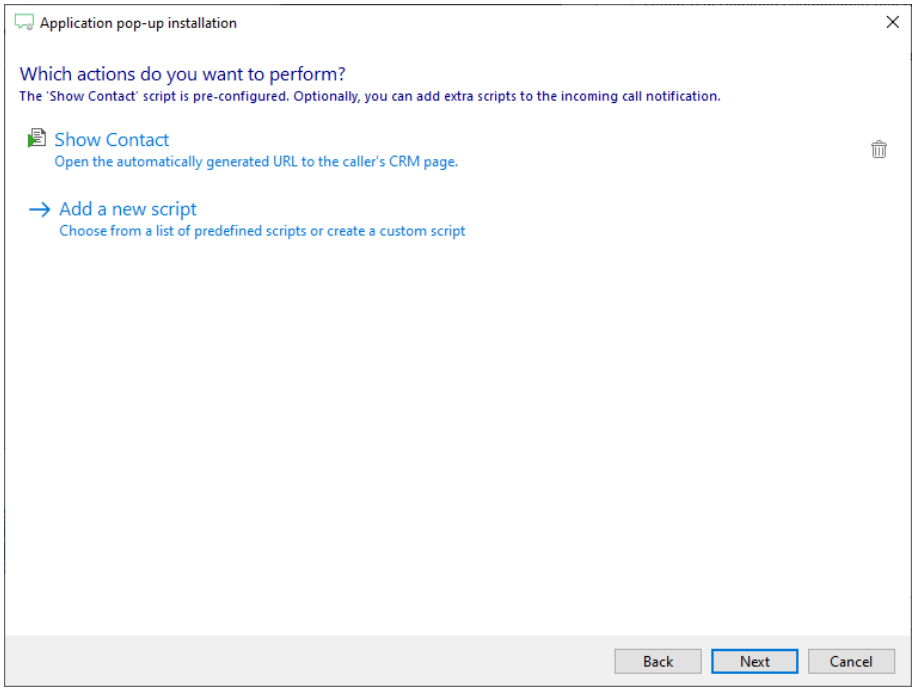
3) Choose which fields to display in the call notification on an incoming call.



4) The 'Show Contact' script is preconfigured. You can add extra scripts or replace the 'Show Contact' script.



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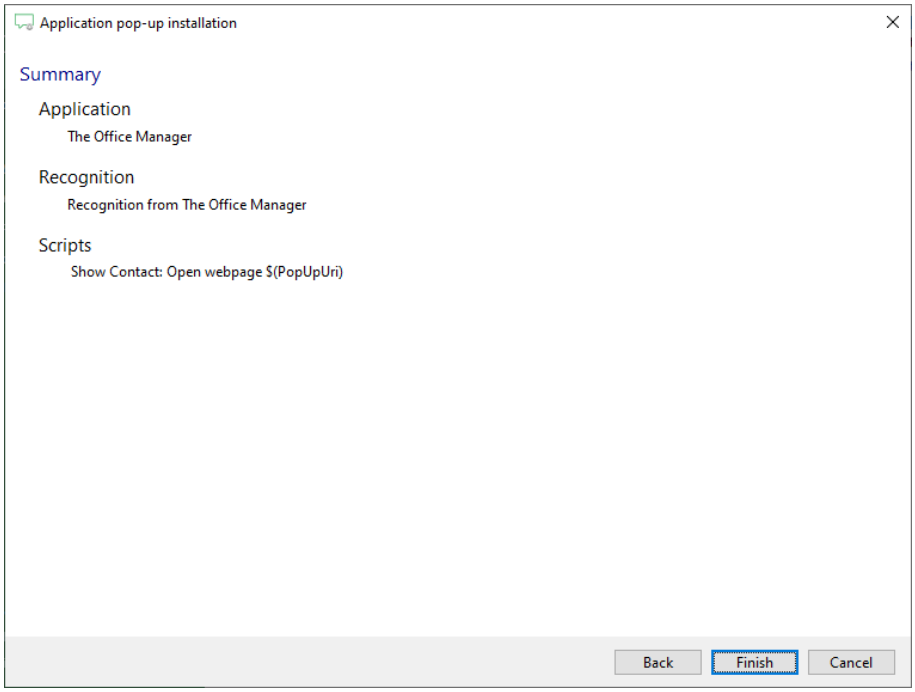
5) Check the configuration summary and click ‘Finish’ to add the integration with the application.



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