

How to configure caller recognition and screen-pop for:

# Tribe CRM

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

### Prerequisites

The integration requires access to the API. During the configuration you will be asked to sign in with a valid Tribe CRM account.

When using screen pop, an authenticated Tribe CRM browser window is required to open the contact page.

#### Notes

Phone numbers on a contact page can be dialed by clicking them.



## Configuration steps

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



#### 2) Authorize access to the API.

Application pop-up installation	×
Authorize access to the CRM data. 👼	
Connect	
	Park Next Canad
	Dack Next Cancel



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

Application p	op-up installation	×
Client call no	tification	
Configure the	information you want the client to show when a caller is recognized from this set	
*Windows allows	Incoming call DisplayName: DisplayName Email: Email Caller number: select number: Application name: Regular to the main Open contact a maximum of 4 lines, and a maximum of 128 characters Add field	
	Back Next Cancel	J

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

Application pop-up installation	×
Which actions do you want to perform? The 'Show Contact' script is configured. Optionally, you can add extra scripts.	
Show Contact Open the automatically generated URL to the caller's CRM page.	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.

Application pop-up installation	:	×
Summary		
Application		
Tribe CRM		
Recognition		
Recognition from TribeCRM		
Scripts		
Show Contact: Open webpage \$(PopUpUri)		
	Back Finish Cancel	