

How to configure caller recognition and screen-pop for:

## Wealthbox

Contact replication method: REST API

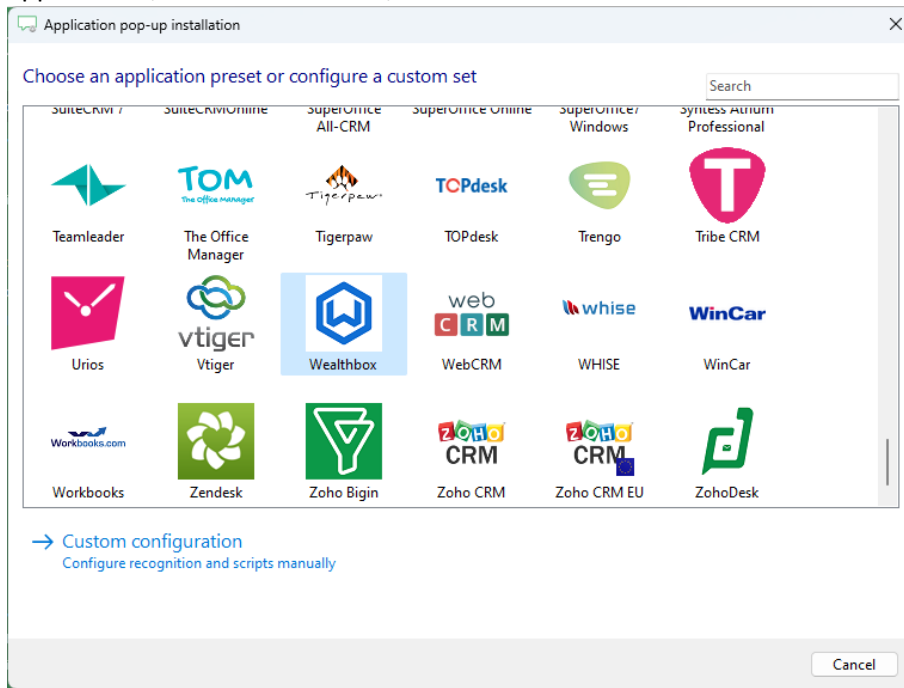
Screen pop method: Generated URL

### Prerequisites

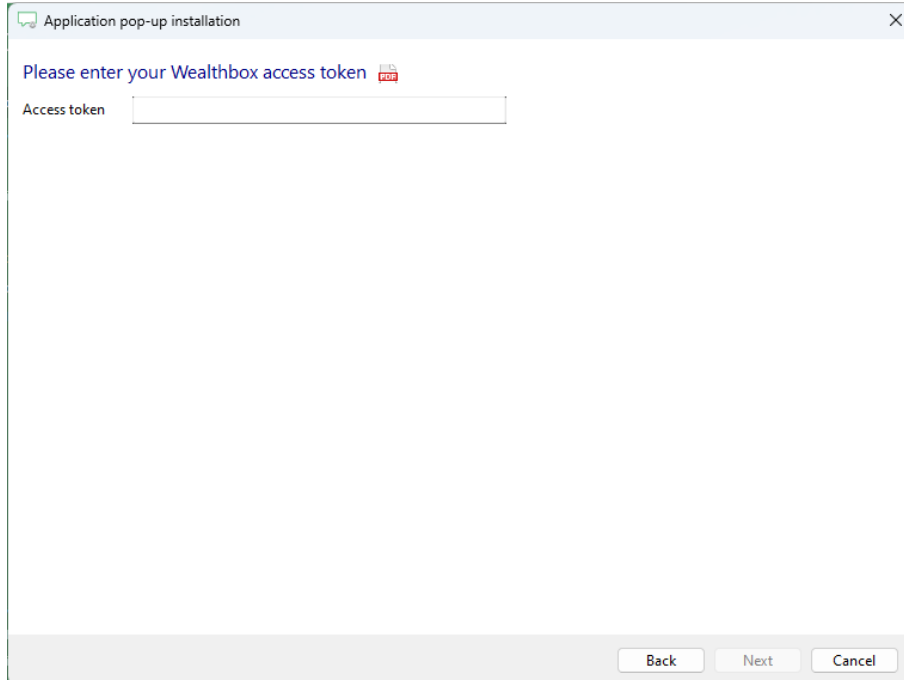
To authenticate access to the Wealthbox API for the caller recognition the integration requires an access token. In order to obtain a new access token or to manage your existing tokens, please visit the API access token settings page, [https://app.crmworkspace.com/settings/access\\_tokens](https://app.crmworkspace.com/settings/access_tokens). From there, simply click 'Create Access Token' and give the token a name.

## Configuraton steps

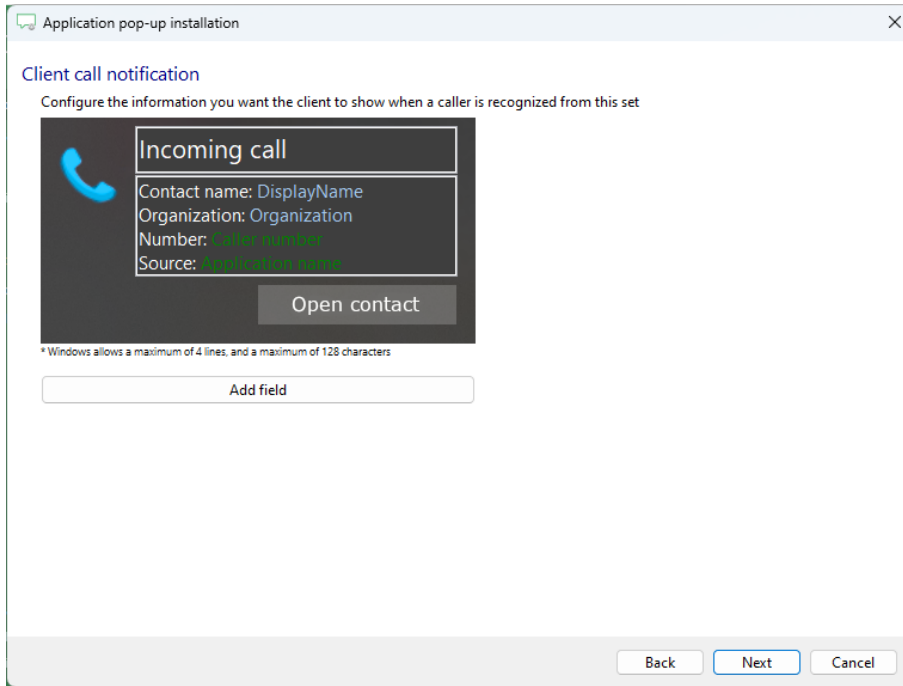
- 1) Start by clicking 'Add application' in the Recognition Configuration Tool. From the list of applications, choose Wealthbox, as shown below.



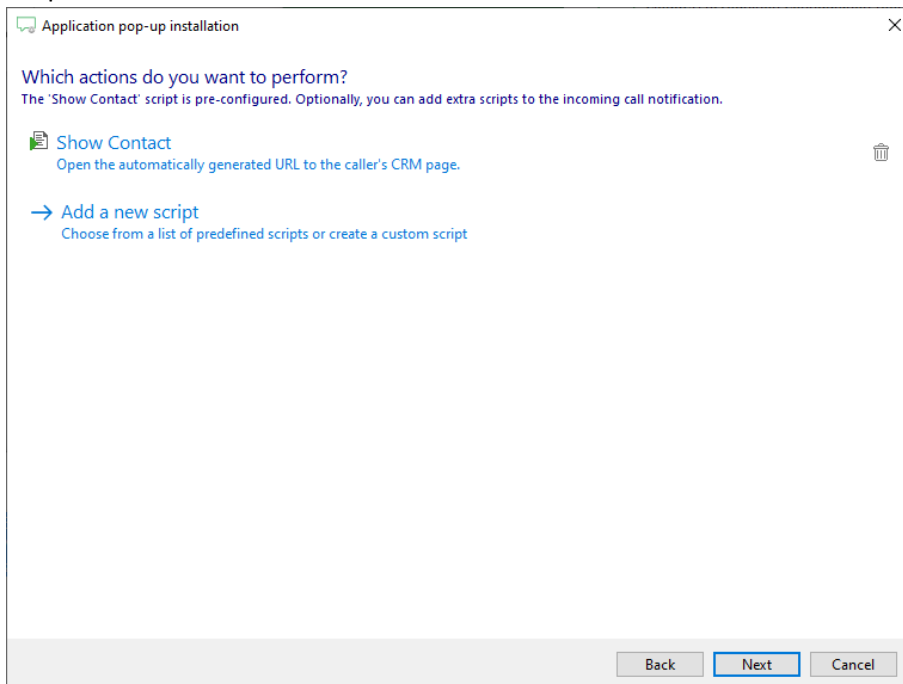
- 2) Authorize access to the API.



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.



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

