How to configure caller recognition and screen-pop for:

WebCRM

Contact replication method: REST API Screen pop method: Open Contact in web page

Prerequisites

Retrieve the Application token from WebCRM:

- 1. Log in to WebCRM
- 2. Click "Configuration" in the top right corner
- 3. Click "Integration" in the menu on the top of the page
- 4. Click "API" in the integration menu
- 5. Create an Application token on this page. Make sure read access to companies and contacts has been given and the API token is active

NFC

Configuration steps

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





2) Enter your Application Token in order to authenticate the Recognition Configuration Tool. Click 'Next' to continue.

Q Application pop-up in	stallation	×
Please enter your W	VebCRM Application token 🛛 👼	
Application token		
		Back Next Cancel

3) The 'Show Contact' is preconfigured. It is possible to add more scripts if desired or click 'next' to continue.

Application pop-up installation	×
Which actions do you want to perform? The WebCRM 'Show Contact' script is preconfigured. Optionally, you can add extra scripts to the incoming	call notification.
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 Cancel



4) Check the configuration summary and click finish to add the WebCRM integration.

Application pop-up installation	×
Summary	
Application	
WebCRM	
Recognition	
Recognition from webCRM	
Scripts	
Show Contact: Open webpage \$(PopUpUri)	
Bac	k Finish Cancel