



How to configure caller recognition and screen-pop for:

Zoho Bigin

Contact replication method: REST API

Screen pop method: Generated URL

Prerequisites

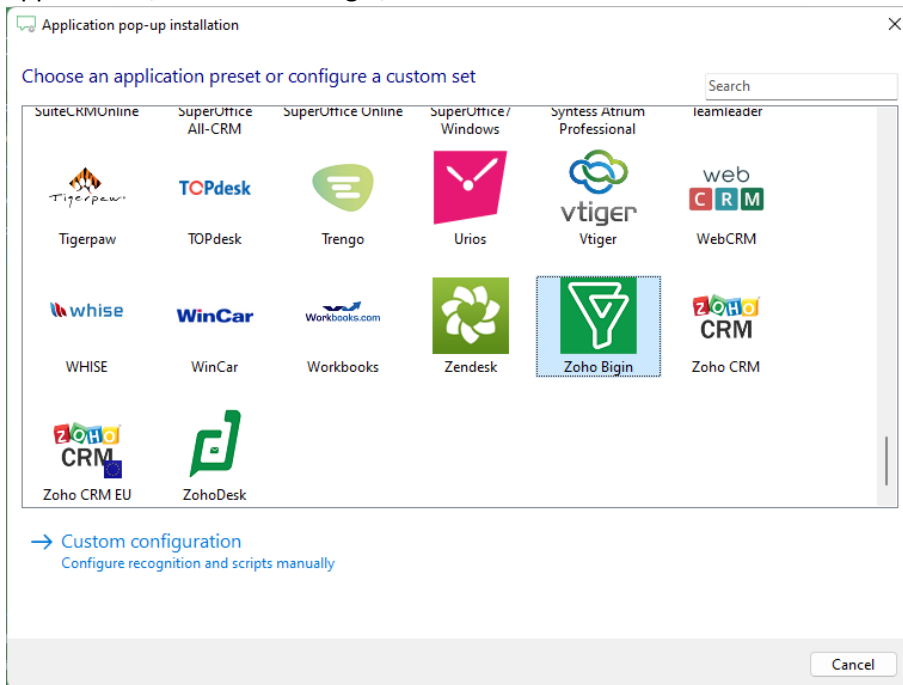
A user with sufficient privileges to authorize read access to contacts, users and accounts.

Notes

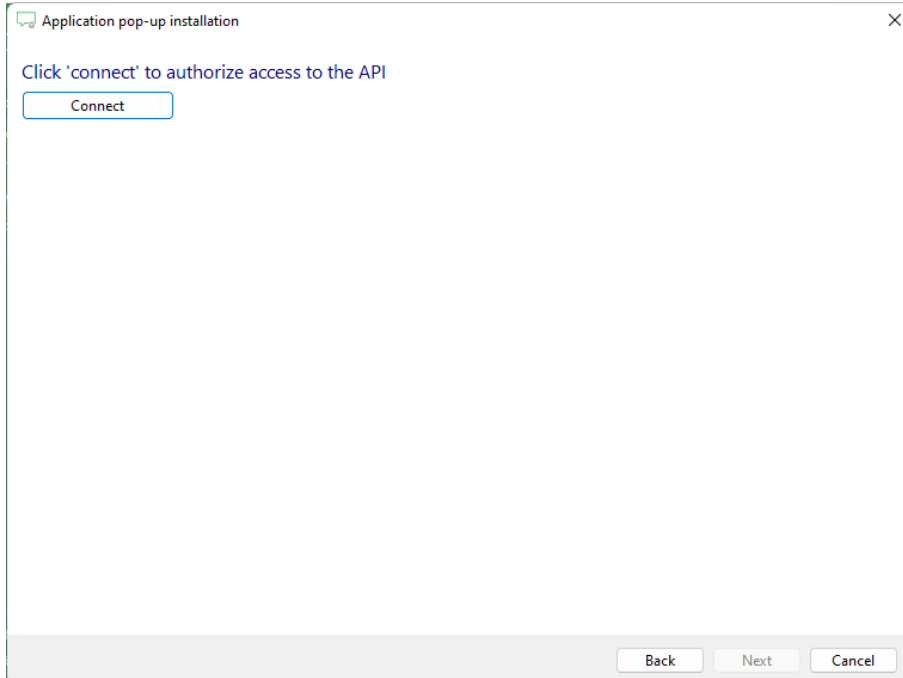
For outbound dialing, highlight a phone number and press the hotkey (PAUSE by default).

Configuraton steps

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



- 2) Authorize access to the API.

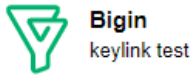


3) Sign in to Zoho Bigin in your browser and click 'accept' to authorize access.



CloudCTI

CloudCTI would like to access the following information.



- To read contacts data
- To read Users in a org api
- To read accounts data

By clicking the "Accept" button you allow CloudCTI to access data in your Zoho account.



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

Application pop-up installation ×

Client call notification

Configure the information you want the client to show when a caller is recognized from this set

Incoming call

Contact name: Name

Organization: Organization

Number: Caller number

Source: Application name

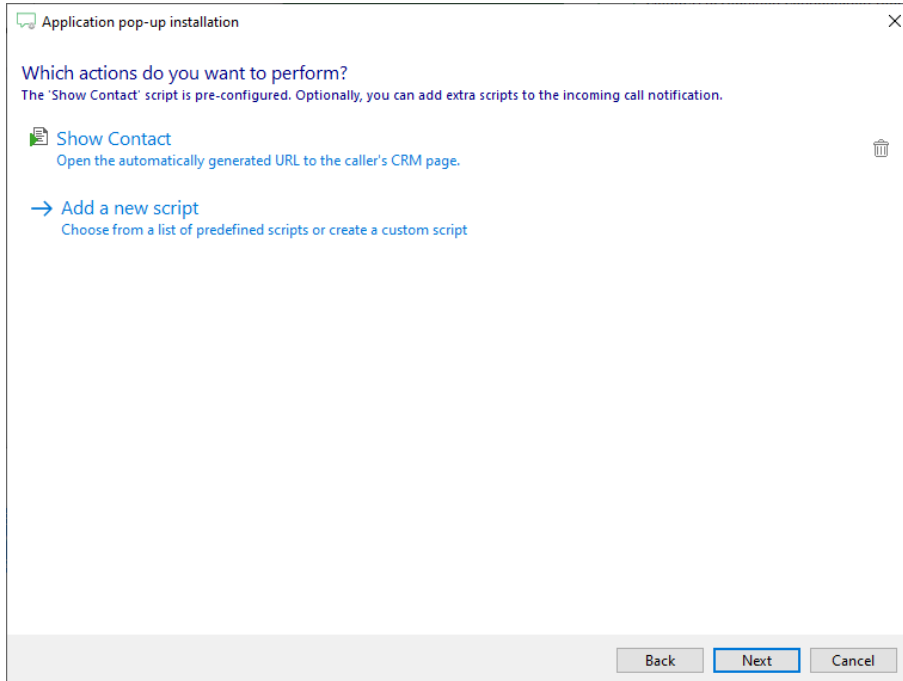
Open contact

* Windows allows a maximum of 4 lines, and a maximum of 128 characters

Add field

Back
Next
Cancel

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



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

