

How to configure caller recognition and screen-pop for:

## Atlas CRM/Data Center (Atlassian Jira)

Supported versions: Atlas CRM Server/Data Center

Contact replication method: REST API

Screen pop method: Uri

### Prerequisites

The Atlas CRM REST API is used for contact data replication. To enable this, you'll need an Atlassian Jira account hosted on Server or Data Center with an Atlas CRM license. Atlas CRM can be found in the [Atlassian Marketplace](#). Follow the installation guide from Atlas CRM in the Marketplace or use the one from Atlassian Support described [here](#). If your Atlassian Jira is hosted locally it should be hosted on the same computer as the Recognition Configuration Tool to be able to configure the contact data.

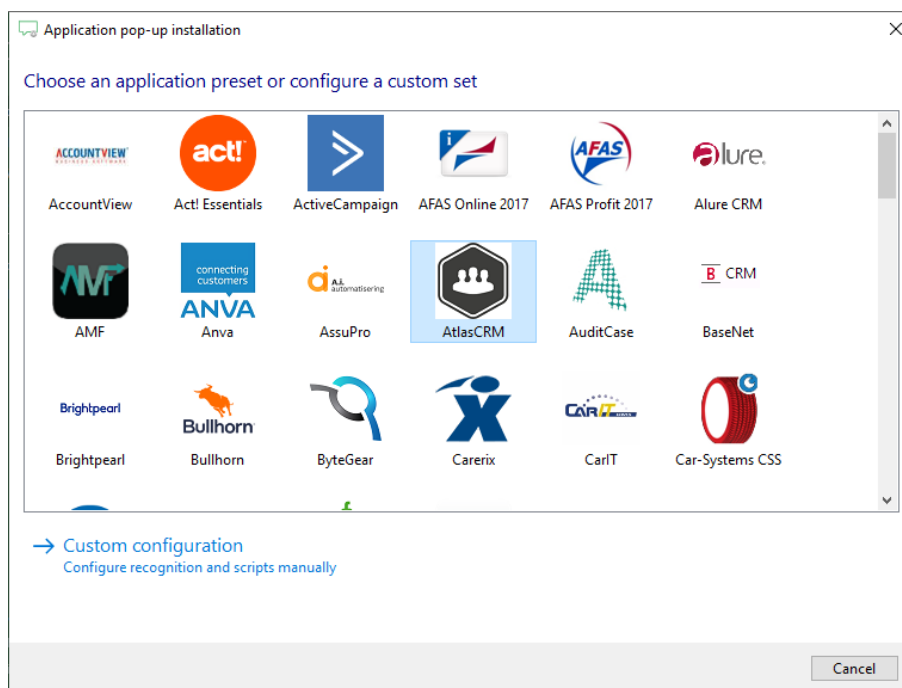
### Notes

With the Atlas CRM integration, the client will open a web page to Atlas CRM and show the contact page based on the caller's phone number.

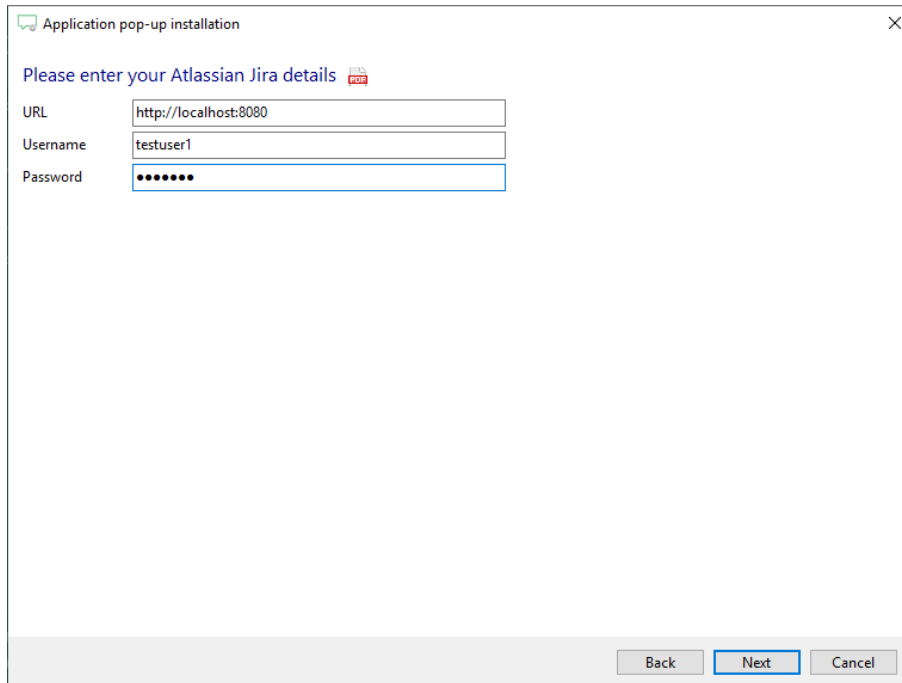
For outbound dialing, Atlas CRM can use tel: hyperlinks. Simply click a phone number on a contact page to start a call.

### 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 'AtlasCRM', as shown below.



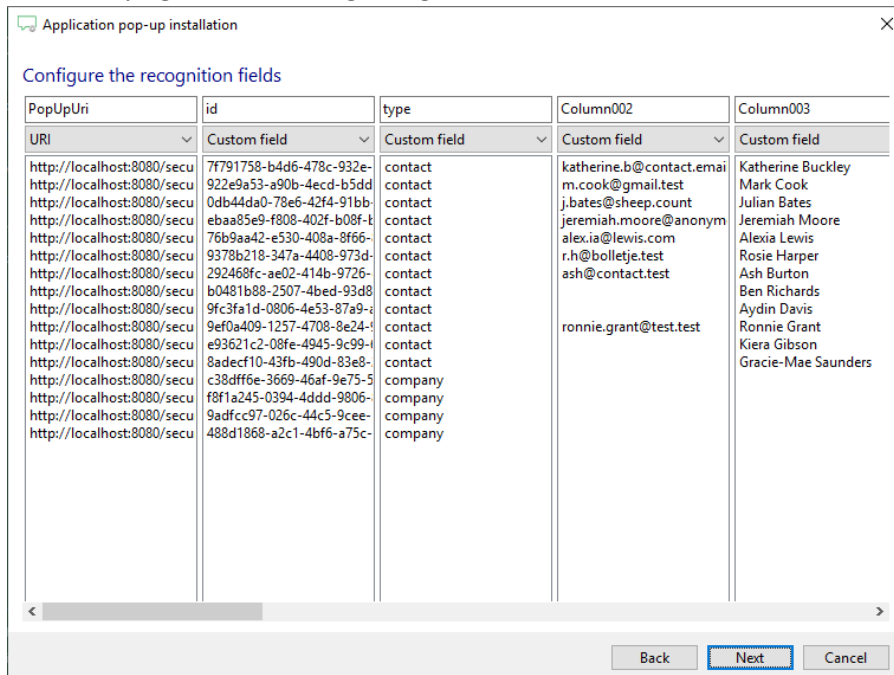
2) Enter your AtlasCRM credentials to access the data from your account and click “next”.



3) A selection of found records is shown. Verify these records, select the correct column types and enter a appropriate name for the column fields. This is relevant for step 4.

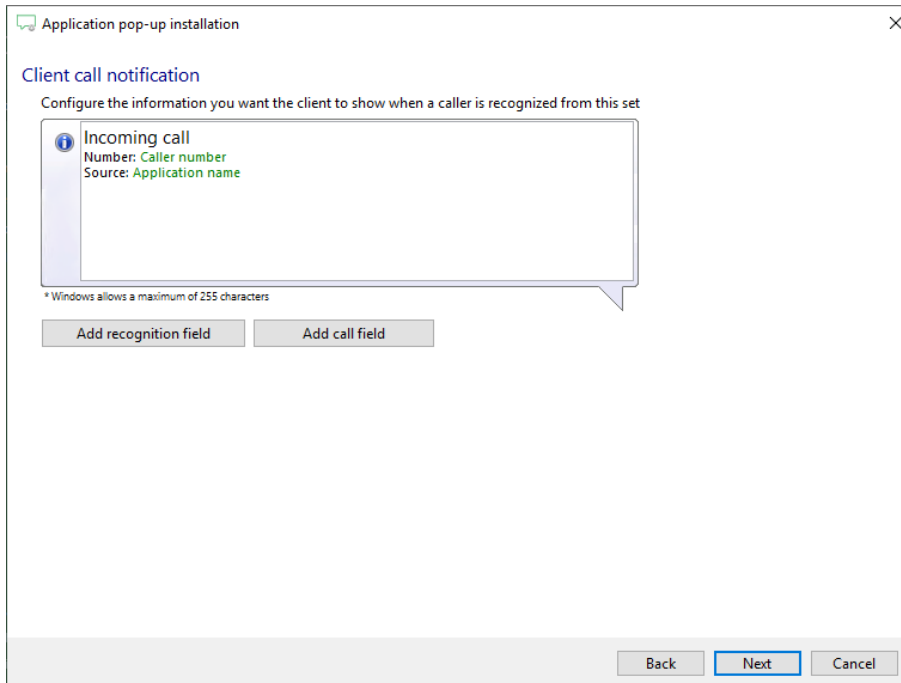
- Please don't alter the recognition fields 'PopUpUri' and 'id', as they are required for the preconfigured action in step 5.

After verifying and/or altering recognition fields click “Next” to continue.



PopUpUri	id	type	Column002	Column003
URI	Custom field	Custom field	Custom field	Custom field
http://localhost:8080/secu	7f791758-b4d6-478c-932e-	contact	katherine.b@contact.emai	Katherine Buckley
http://localhost:8080/secu	922e9a53-a90b-4ecd-b5dd	contact	m.cook@gmail.test	Mark Cook
http://localhost:8080/secu	0db44da0-78e6-42f4-91bb-	contact	j.bates@sheep.count	Julian Bates
http://localhost:8080/secu	ebaa85e9-f808-402f-b08f-t	contact	jeremiah.moore@anonym	Jeremiah Moore
http://localhost:8080/secu	76b9aa42-e530-408a-9f66-	contact	alex.ia@lewis.com	Alexia Lewis
http://localhost:8080/secu	9378b218-347a-4408-973d-	contact	r.h@bolletje.test	Rosie Harper
http://localhost:8080/secu	292468fc-ae02-414b-9726-	contact	ash@contact.test	Ash Burton
http://localhost:8080/secu	b0481b88-2507-4bed-93d8	contact		Ben Richards
http://localhost:8080/secu	9fc3fa1d-0806-4e53-87a9-i	contact		Aydin Davis
http://localhost:8080/secu	9ef0a409-1257-4708-8e24-i	contact		Ronnie Grant
http://localhost:8080/secu	e93621c2-08fe-4945-9c99-i	contact	ronnie.grant@test.test	Kiera Gibson
http://localhost:8080/secu	8adecf10-43fb-490d-83e8-	contact		Gracie-Mae Saunders
http://localhost:8080/secu	c38dff6e-3669-46af-9e75-5	company		
http://localhost:8080/secu	f8f1a245-0394-4ddd-9806-	company		
http://localhost:8080/secu	9adfcc97-026c-44c5-9cee-	company		
http://localhost:8080/secu	488d1868-a2c1-4bf6-a75c-	company		

- 4) Choose which recognition fields to display in the call notification on an incoming call. Make use of the recognition fields created and/or altered in step 3 to create a notification, or use the template as shown below. Click “Next” to continue.



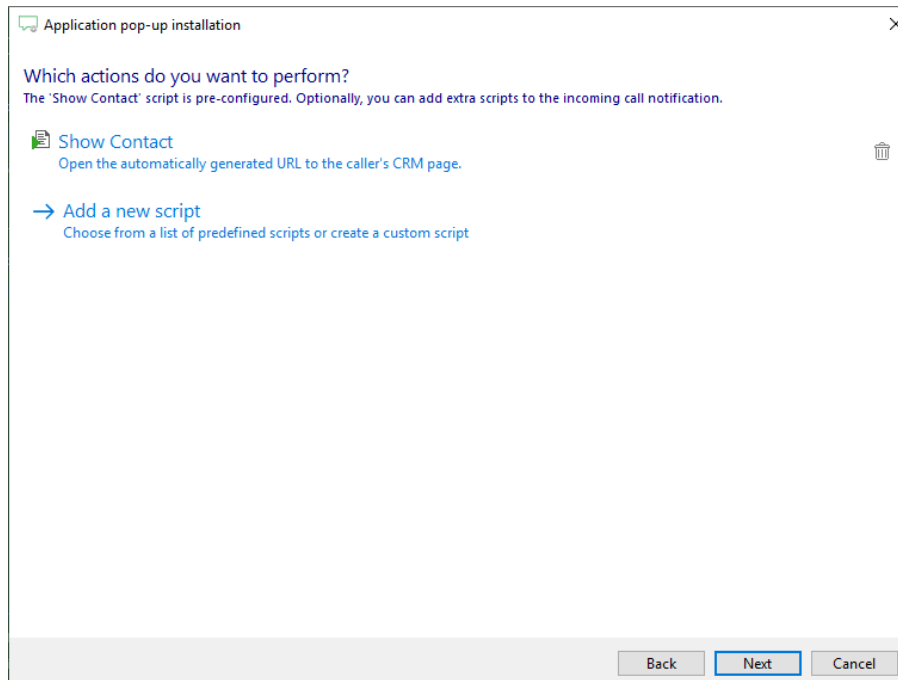
The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. The main heading is "Client call notification". Below it, the instruction reads: "Configure the information you want the client to show when a caller is recognized from this set".

There is a preview window showing a notification template for an "Incoming call" with the following fields: "Number: Caller number" and "Source: Application name". Below the preview, a note states: "\* Windows allows a maximum of 255 characters".

At the bottom of the preview area, there are two buttons: "Add recognition field" and "Add call field".

At the bottom of the dialog box, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

- 5) The 'Show Contact' action has been preconfigured. It is possible to add additional actions if required. Click “Next” to continue.



The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. The main heading is "Which actions do you want to perform?". Below it, the instruction reads: "The 'Show Contact' script is pre-configured. Optionally, you can add extra scripts to the incoming call notification."

There are two main options listed:

- Show Contact**: Open the automatically generated URL to the caller's CRM page. (Includes a trash icon for removal)
- Add a new script**: Choose from a list of predefined scripts or create a custom script.

At the bottom of the dialog box, there are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

6) Check the configuration summary and click “Finish” to add the AtlasCRM integration.

