

How to configure caller recognition and screen-pop for:

Carerix

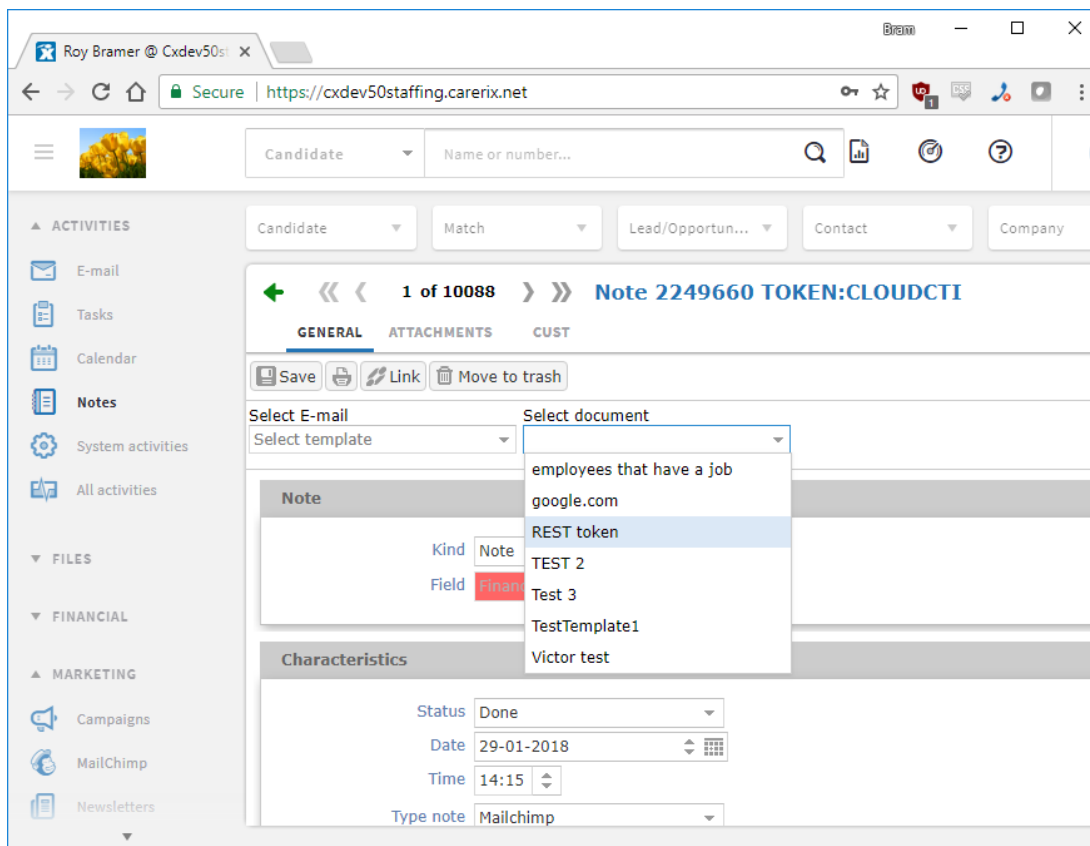
Supported versions: Carerix

Contact replication method: Cx REST API. More info here: <http://en.wiki.carerix.com/index.php/Cxrest>

Screen pop method: URI

Prerequisites

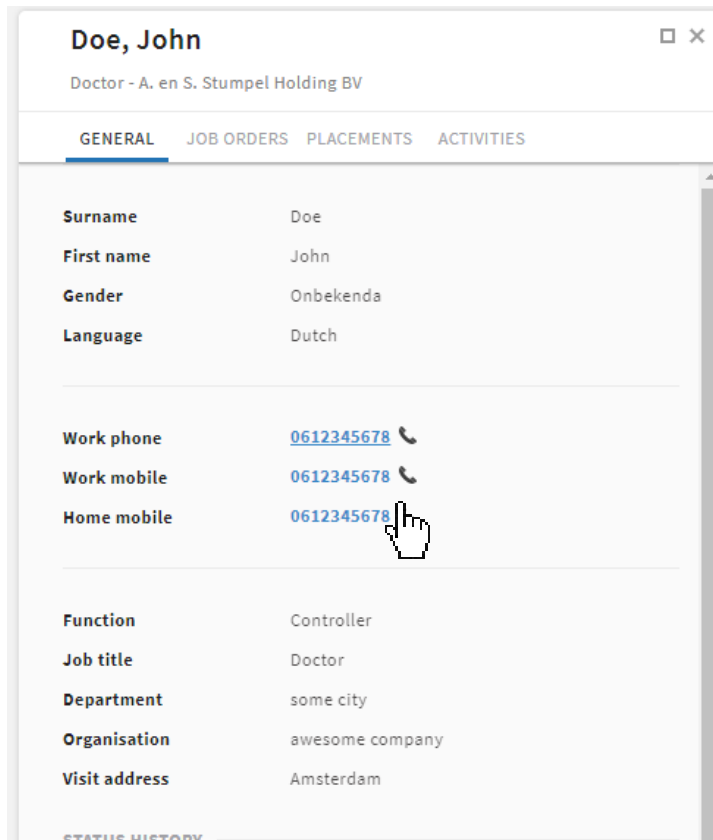
The Carerix integration uses web services for contact data replication. To enable this, the Recognition Update service must be authorized via the Carerix REST API authentication to read Carerix data. This requires a valid 'system name' and access token. The system name is the name of your organization and is usually the first part of your custom Carerix URL, i.e. <https://MyCompany.carerix.net>. To generate the access token, follow the instructions in the Carerix documentation here: <http://en.wiki.carerix.com/index.php/Cxrest>. In step 3, with the note, select document 'REST Token' as shown in the screenshot below.



Notes

Dial from Carerix by selecting the phone number, then press the keyboard hotkey (default: PAUSE). Click to dial can also be enabled by Carerix on request, mail to support@carerix.net

(additional cost to Carerix may apply). When enabled the phone numbers will be clickable as shown in the screenshot below.

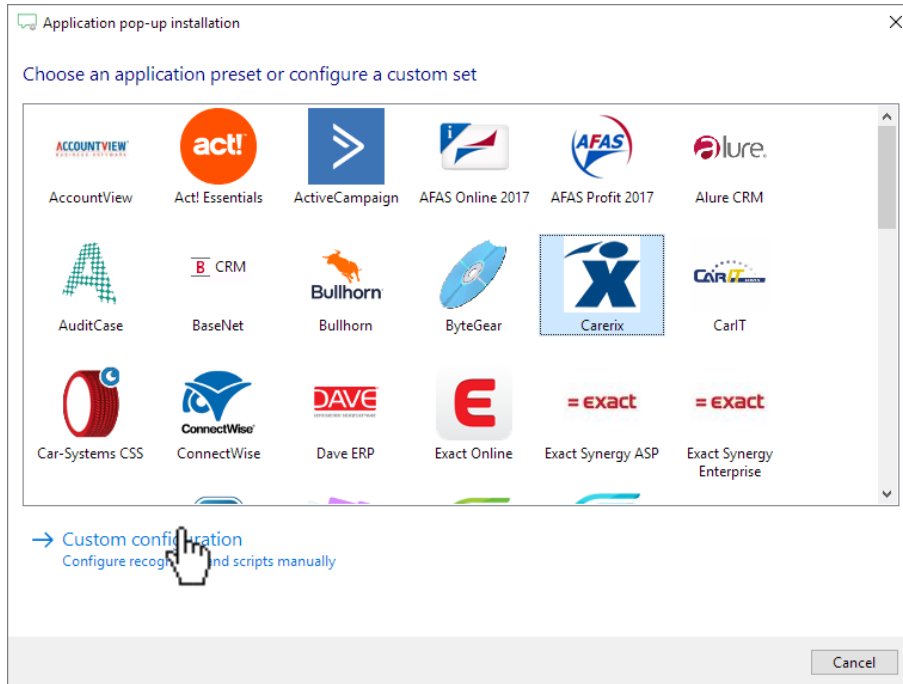


The screenshot displays a user profile for John Doe, a Controller at Doctor - A. en S. Stumpel Holding BV. The profile is divided into sections: General, Job Orders, Placements, and Activities. The General section lists personal details such as Surname (Doe), First name (John), Gender (Onbekenda), and Language (Dutch). Below this, contact information is provided for Work phone, Work mobile, and Home mobile, all of which are displayed as clickable blue links with phone icons. Further down, professional details like Function (Controller), Job title (Doctor), Department (some city), Organisation (awesome company), and Visit address (Amsterdam) are listed. A 'STATUS HISTORY' section is partially visible at the bottom.

Field	Value
Surname	Doe
First name	John
Gender	Onbekenda
Language	Dutch
Work phone	0612345678
Work mobile	0612345678
Home mobile	0612345678
Function	Controller
Job title	Doctor
Department	some city
Organisation	awesome company
Visit address	Amsterdam

Configuration steps

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



- 2) Enter your Carerix **system name** and **access token**. To authorize CloudCTI to access data via the Infusion, press "Connect".

The screenshot shows a window titled "Application pop-up installation" with a close button (X) in the top right corner. Below the title bar, it says "Please enter your Carerix details" with a PDF icon. There are two input fields: "System name" and "Access token". Below these are three checked checkboxes: "Include users", "Include employees", and "Include companies". At the bottom, there are three buttons: "Back", "Next", and "Cancel".

3) Check the configuration summary and click finish to add the recognition from Infusionsoft

