

How to configure caller recognition and screen-pop for:

Workbooks

Supported versions: Workbooks

Contact replication method: Workbooks API

Screen pop method: Url

Prerequisites

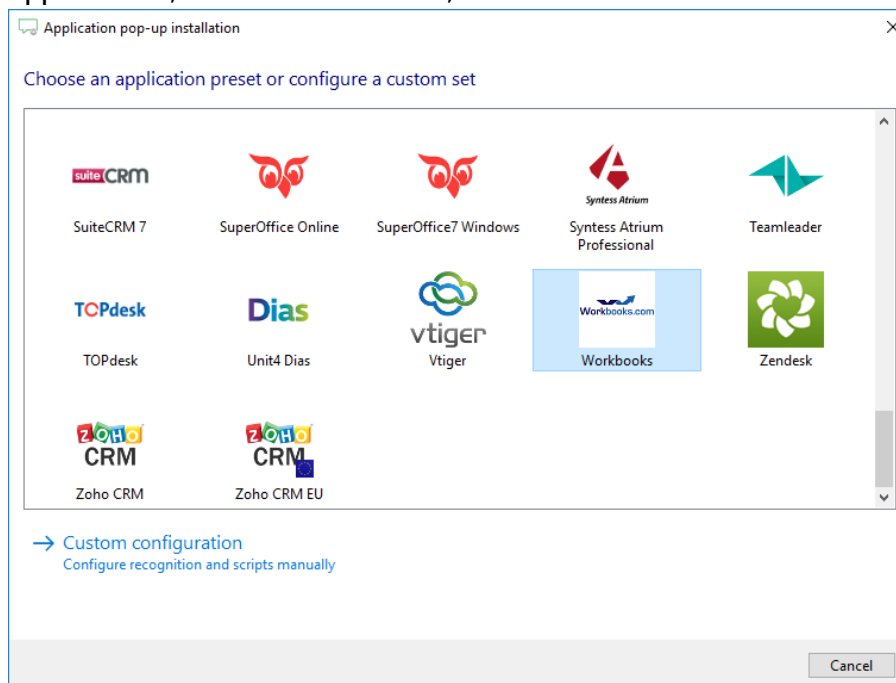
User account with access to a Workbooks API key which has the capability to “View Parties (People and Organisations)”.

API Key

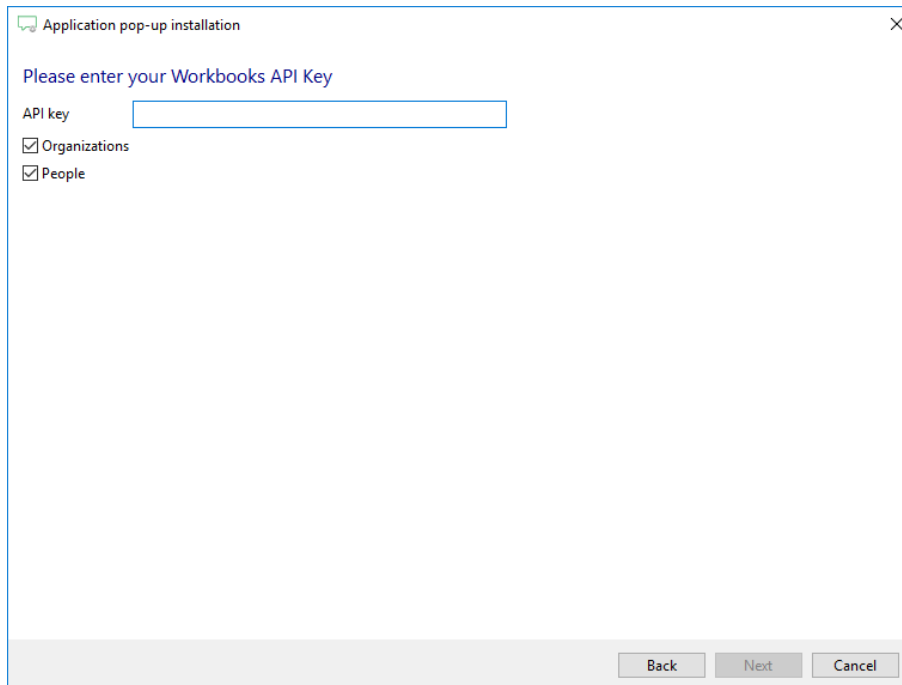
To create an API Key go to your Workbooks Account > Start > Preferences > API Keys and click “New API Key”. Give the API Key a name, e.g. “CTI”, and click “Create”. Add the capability “View Parties (People and Organisations)” to the API Key and Save it.

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 ‘Workbooks’, as shown below.

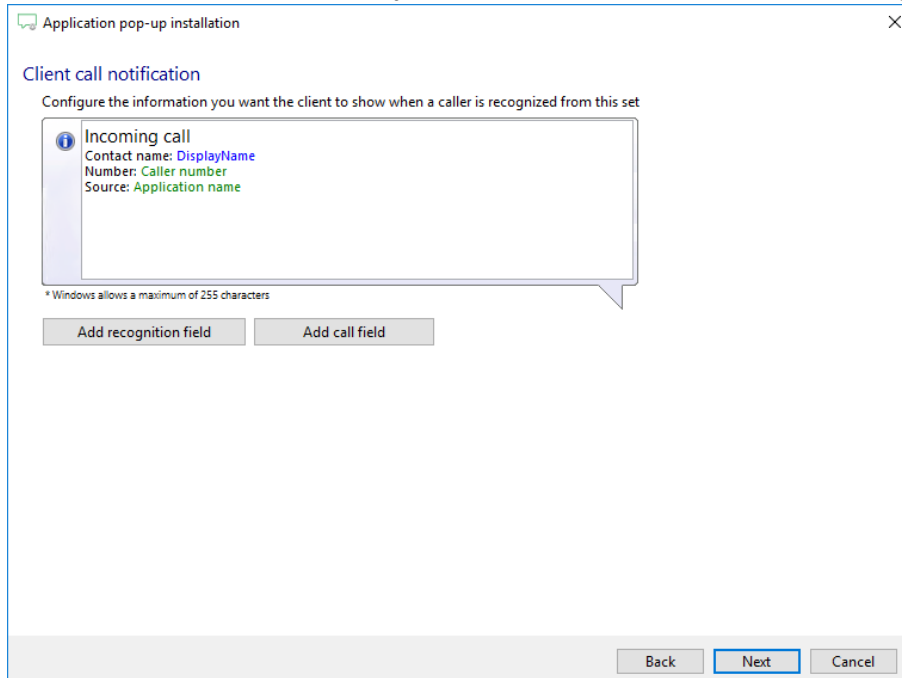


- 2) Enter your Workbooks API key and select which contacts you would like to add. Press 'next' to continue.



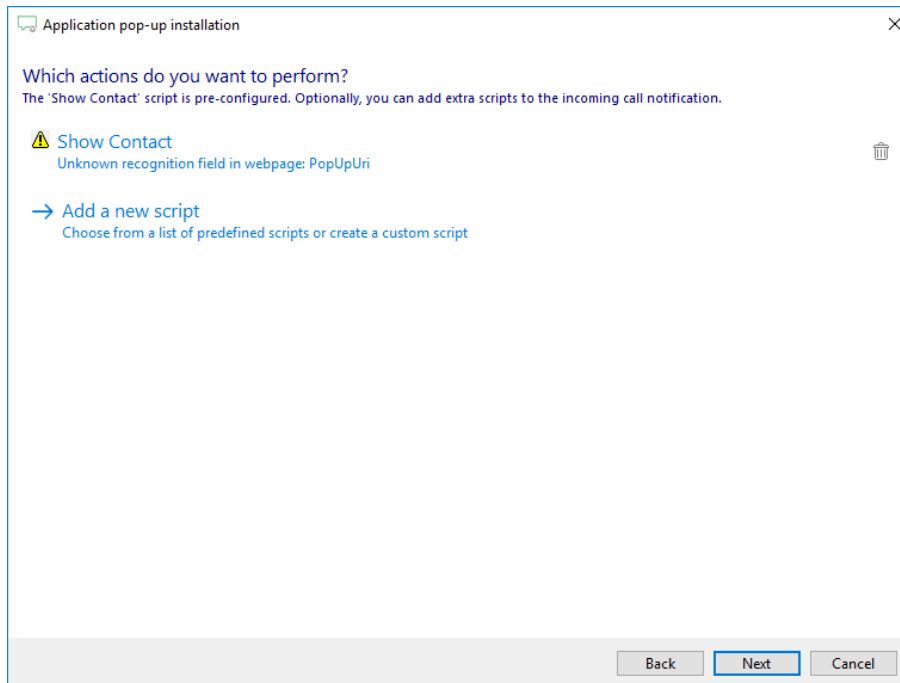
The screenshot shows a dialog box titled "Application pop-up installation" with a close button (X) in the top right corner. The main heading is "Please enter your Workbooks API Key". Below this, there is a text input field for the "API key". Underneath the input field, there are two checked checkboxes: "Organizations" and "People". At the bottom of the dialog box, there are three buttons: "Back", "Next", and "Cancel".

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



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 this, there is a sub-heading "Configure the information you want the client to show when a caller is recognized from this set". A large text area contains a preview of an "Incoming call" notification with the following text: "Contact name: DisplayName", "Number: Caller number", and "Source: Application name". Below the text area, there is a small note: "* Windows allows a maximum of 255 characters". At the bottom of the dialog box, there are two buttons: "Add recognition field" and "Add call field". At the very bottom, there are three buttons: "Back", "Next", and "Cancel".

- 4) After you have configured the default script you can add more scripts if desired or click 'next' to continue.



- 5) Check the configuration summary and click finish to add the recognition from Workbooks.

