How to configure caller recognition and screen-pop for:

ACT! Essentials

Supported versions: ACT! Essentials
Contact replication method: Swiftpage API
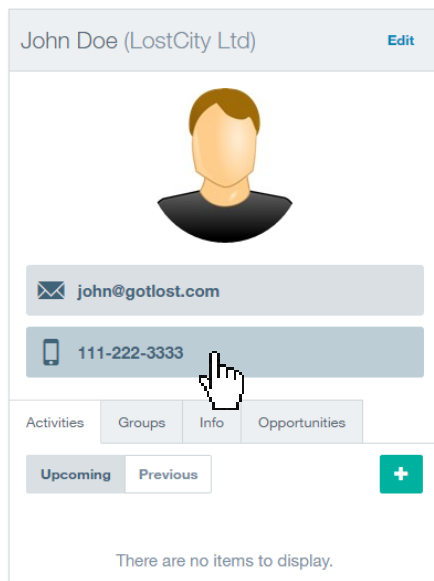Screen pop method: URI

Prerequisites

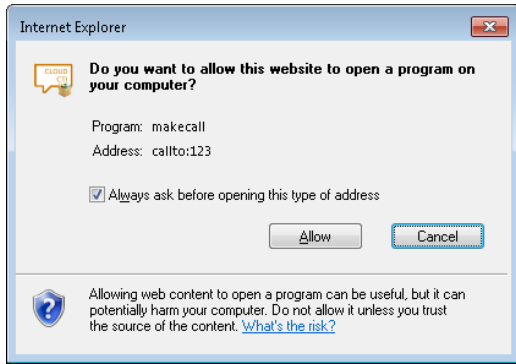To replicate data from ACT! Essentials via the ACT! Swiftpage API, there is an API Key required.

Sign in to ACT! Essentials as administrator and generate the key via "Profile > My Profile > Apps & Integrations", direct link: https://mycloud.act.com/#/account/integration

Notes

ACT! Essentials supports click to dial via a tel: uri. Simply click on the dial button to set up a call.

At first run, the user's approval might be required. Uncheck the option "Always ask…" and press "Allow"

Internet Explorer

Do you want to allow this website to open a program on your computer?

Program: makecall

Address: callto:123

☑ Always ask before opening this type of address

[Allow] [Cancel]

Allowing web content to open a program can be useful, but it can potentially harm your computer. Do not allow it unless you trust the source of the content. What's the risk?
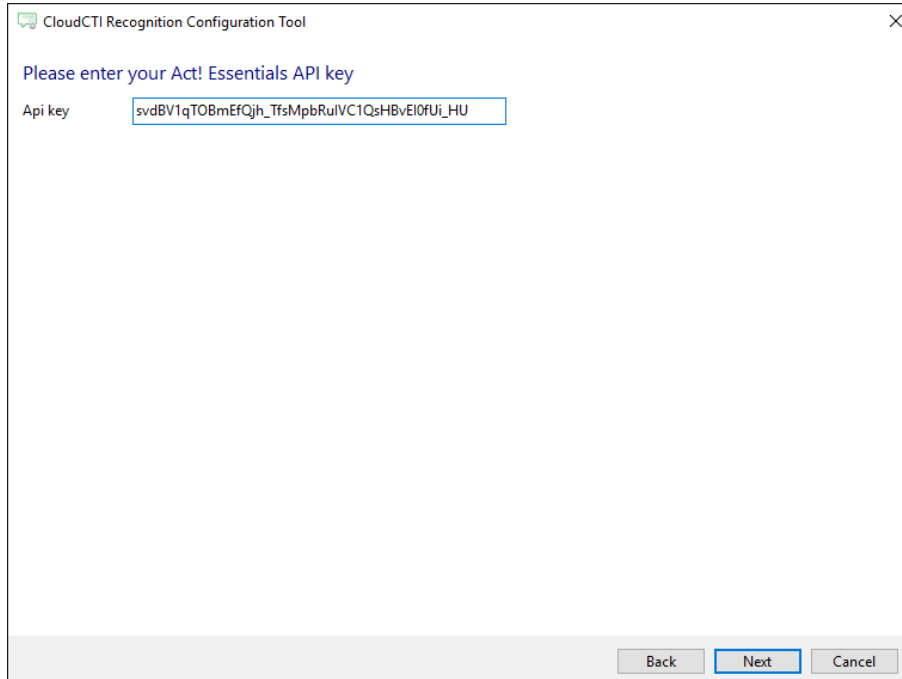
Configuration steps

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 'ACT! Essentials', as shown below.
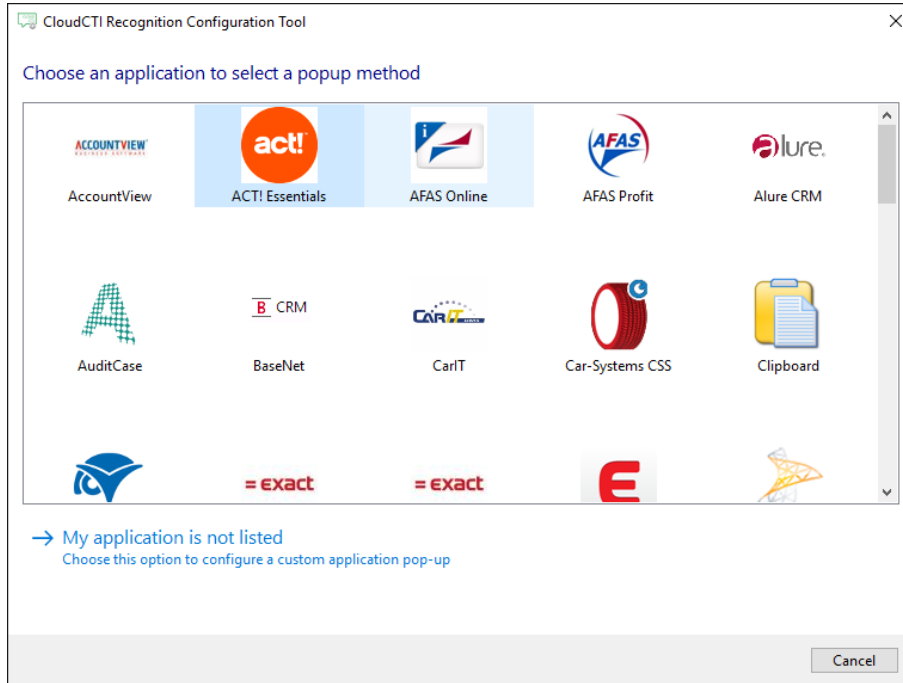
2) Enter your ACT! Essentials API key to access the data from your account

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