How to configure caller recognition and screen-pop for:

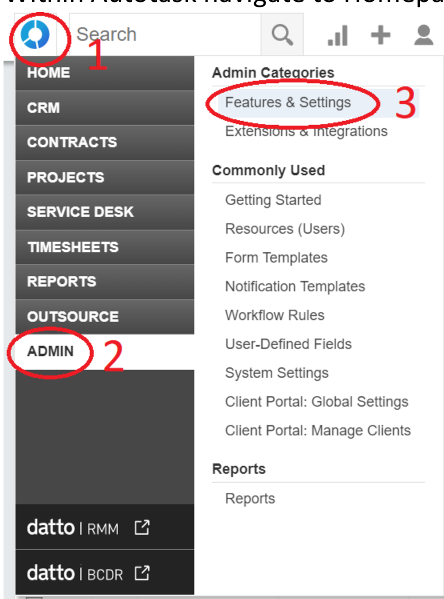
Autotask

Contact replication method: API
Screen pop method: URI

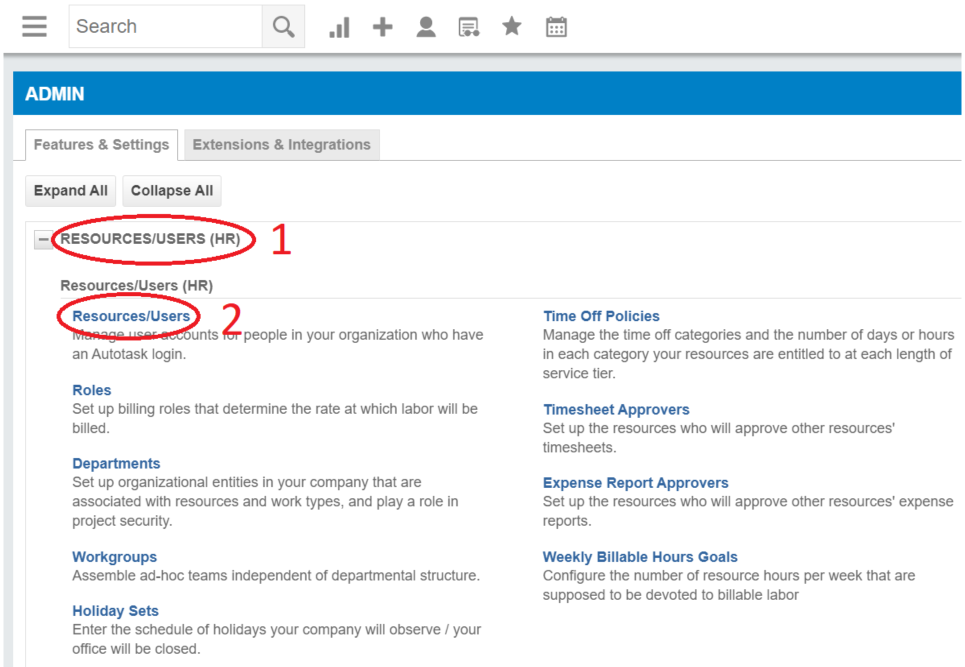
Prerequisites

A specific Autotask API Account is required in order to complete the integration. Follow these steps to create an API Account which works with the Configuration tool:

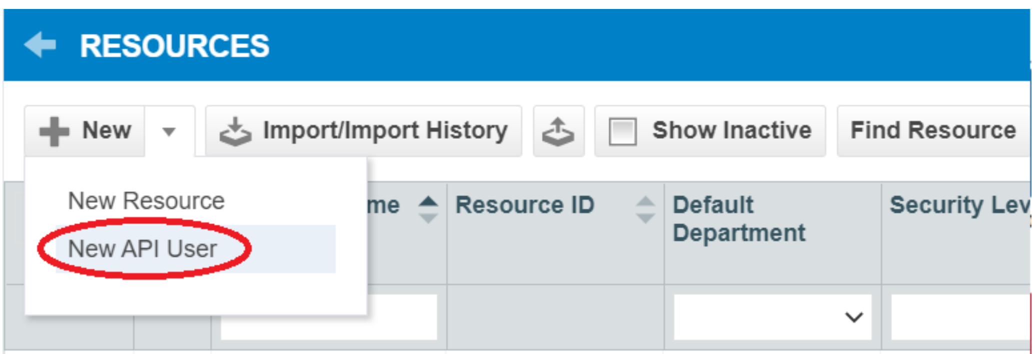
1. Within Autotask navigate to Homepage > Admin > Features & Settings



2. Expand ‘RESOURCES/USERS (HR)’ and click ‘Resources/Users’

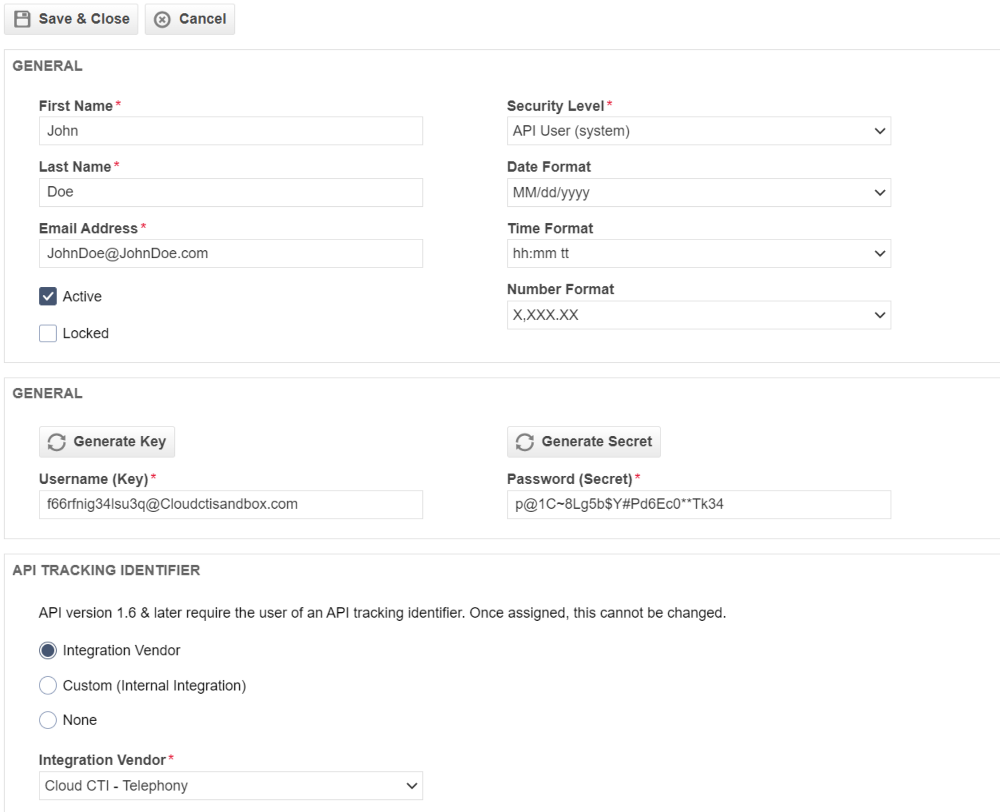


3. Click ‘New API User’



4. Fill out the necessary fields under the first ‘General’ area. This information will not be used for our API services, so anything valid will work.
   - Remember to set the ‘Security Level’ to ‘API User (System)’
5. Generate the API Keys under the second ‘general’ area.
   - Click the Generate Key button to generate a user key. Make sure to copy and paste that key to a separate area, like Notepad or Word, for later usage.
   - Click the Generate Secret button to generate a secret password. Make sure to copy and paste that key to a separate area, like Notepad or Word, for later usage. This will not be accessible later.
6. Select the vendor from the dropdown in the ‘API Tracking Identifier’ section
   - Ensure ‘Integration Vendor’ is selected
   - Scroll through the list to find and select ‘Cloud CTI - Telephony’
7. For the ‘Line of Business’ field, drag over all relevant line items that relate to reading contact data to ensure the right areas can be read.

8. Click 'Save & Close' at the top once of this window once you've copied over both keys and ensured all fields are set correctly.

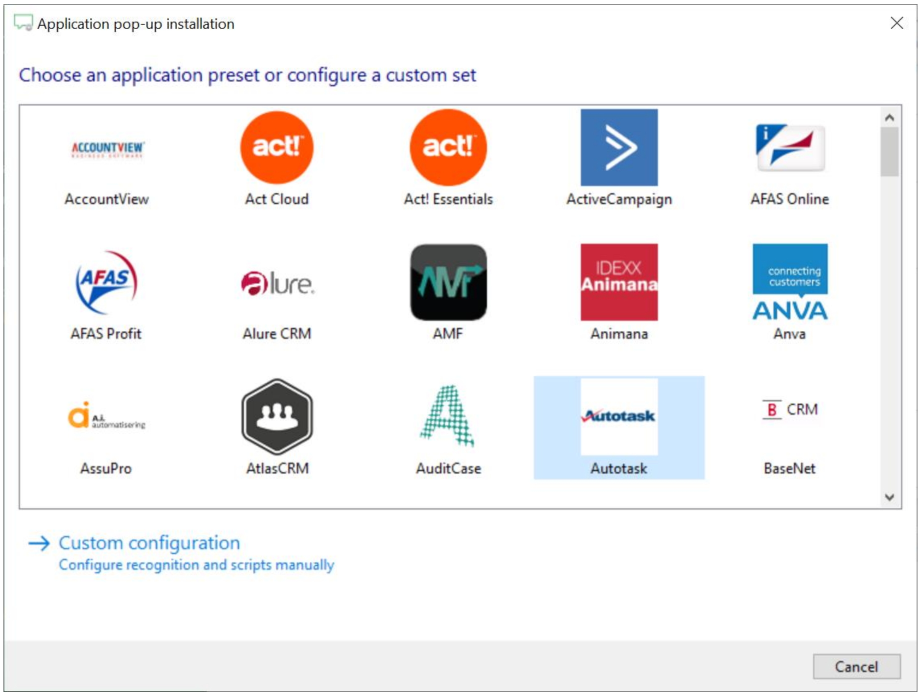


Notes

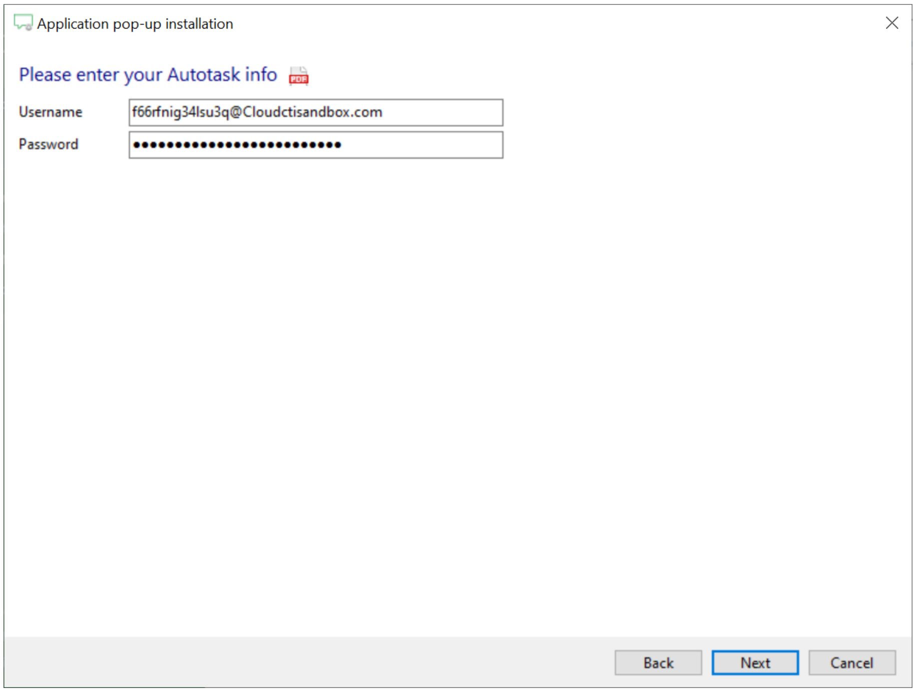
For outbound dialing, highlight a phone number inside Autotask and press the dial hotkey.

Configuration steps

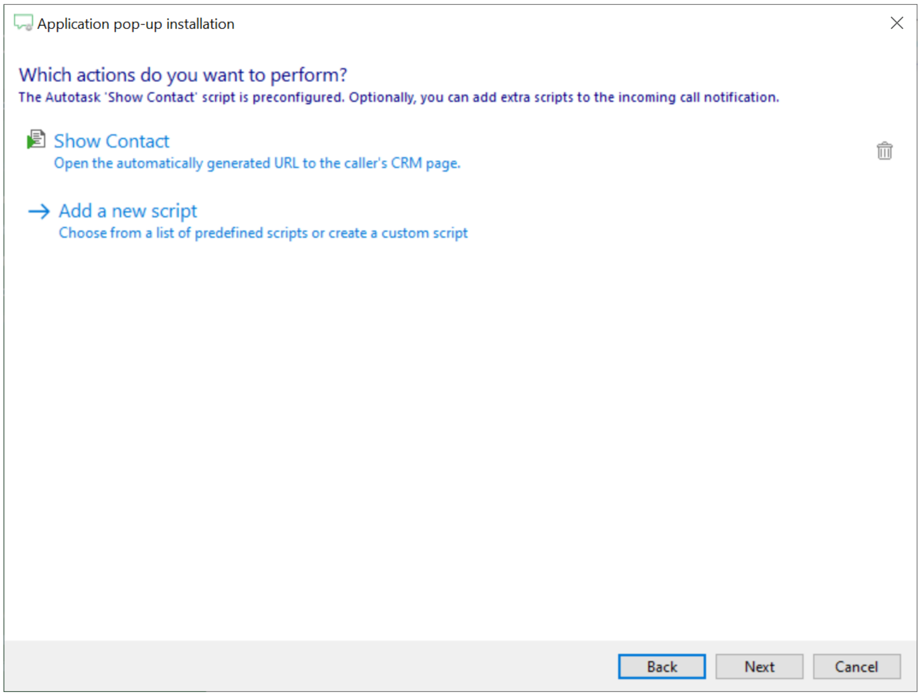
Start by clicking ‘add recognition’ in the Recognition Configuration Tool (this is done automatically if no configuration has yet been configured). From the list of applications, choose ‘Autotask’, as shown below.



1) Enter your API account Username and Password that have been created. Click ‘Next’ to continue.



2) The ‘Show Contact’ Script is preconfigured. You can add extra scripts or replace the ‘Show Contact’ script.



3) Check the configuration summary and click ‘Finish’ to add the recognition from Act! Cloud