

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'

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- RE	ESOURCES/USERS (HR)	1						
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a	Resources/Users 2 Wanage User accounts for pe an Autotask login.	ople in your o	ganizati	on who	have		Time Off Policies Manage the time off categories and the number of days or hours in each category your resources are entitled to at each length of service tier.	
F S b	Roles Set up billing roles that deterr billed.	nine the rate a	at which	labor w	/ill be		Timesheet Approvers Set up the resources who will approve other resources' timesheets.	
a p	Departments Set up organizational entities associated with resources and project security.	in your compa d work types,	any that and play	are a role	in		Expense Report Approvers Set up the resources who will approve other resources' expense reports.	
V A	Norkgroups Assemble ad-hoc teams inde	pendent of de	partment	tal stru	cture.		Weekly Billable Hours Goals Configure the number of resource hours per week that are	
F E	Holiday Sets Enter the schedule of holiday: office will be closed.	s your compai	ny will ob	serve	/ your		supposed to be devoted to billable labor	
ck 'New API User'								
	RESOURCES					_		

+ New - 🕹 Impor	rt/Import History	Show Inactiv	/e Find Resource
New Resource New API User	me 🌩 Resource	ID Default Departmer	Security Lev
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- 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.

3.

- 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.

ERAL	
First Name *	Security Level*
John	API User (system)
Last Name*	Date Format
Doe	MM/dd/yyyy
Email Address*	Time Format
JohnDoe@JohnDoe.com	hh:mm tt 🗸 🗸
Active	Number Format
	X,XXX.XX 🗸
Locked	
C Generate Key	☐ Generate Secret
C Generate Key Username (Key)*	☐ Generate Secret Password (Secret)*
NERAL Generate Key Username (Key)* 166rfnig34lsu3q@Cloudctisandbox.com	C Generate Secret Password (Secret)* p@1C~8Lg5b\$Y#Pd6Ec0**Tk34
NERAL Generate Key Username (Key)* f66rfnig34lsu3q@Cloudctisandbox.com TRACKING IDENTIFIER API version 1.6 & later require the user of an API track	Generate Secret   Password (Secret)*   p@1C~8Lg5b\$Y#Pd6Ec0**Tk34   king identifier. Once assigned, this cannot be changed.
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## 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.

	pop-up installation	×
Please ente	er your Autotask info 📠	
Username	f66rfnig34lsu3q@Cloudctisandbox.com	
Password	•••••	
		Back Next Cancel



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

Same Application pop-up installation	×
Which actions do you want to perform? The Autotask 'Show Contact' script is preconfigured. Optionally, you can add extra scripts to the incoming call notification.	
Show Contact Open the automatically generated URL to the caller's CRM page.	
→ Add a new script Choose from a list of predefined scripts or create a custom script	
Back Next (	Cancel

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

Section pop-up installation	×
Summary	
A strait	
Application	
Autotask	
Recognition	
Recognition from Autotask	
Scripts	
Show Contact: Open webpage \$(PopUpUri)	
	Back Finish Cancel