

How to configure caller recognition and screen-pop for:

## ConnectWise

Supported versions: ConnectWise release v4.6, REST API 3.0

Contact replication method: API

Screen pop method: URL

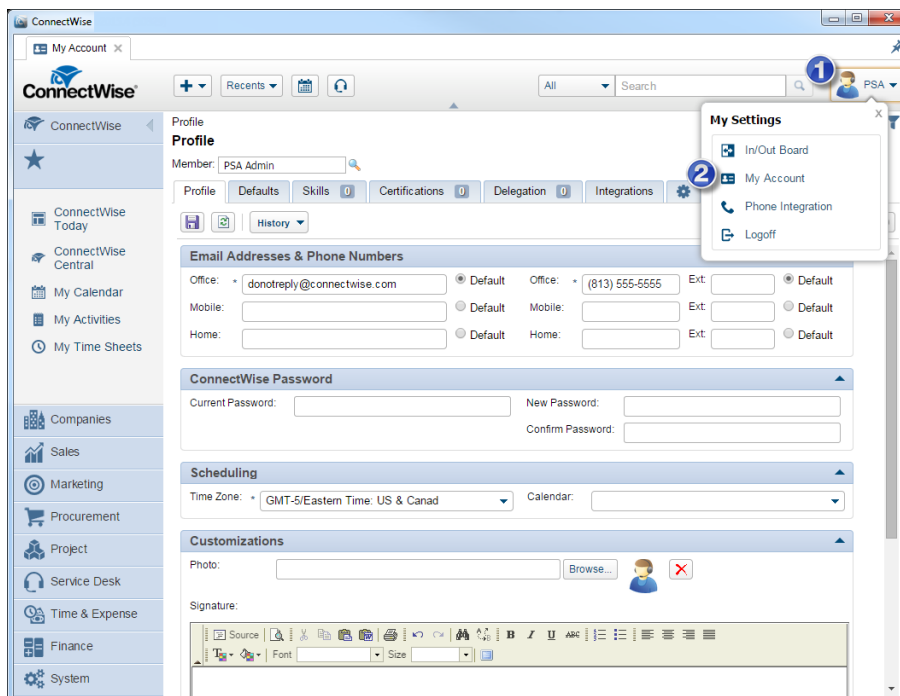
### Prerequisites

The Recognition Tool requires access to the ConnectWise API to retrieve data for caller recognition and pop up contact card.

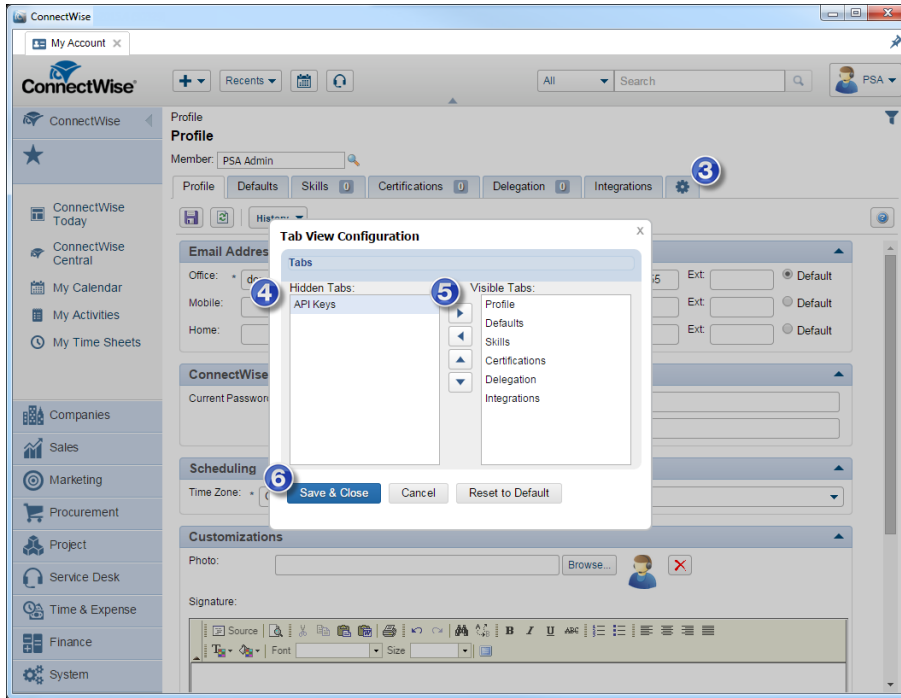
You'll need to provide us with

1. ConnectWise site e.g. <https://na.myconnectwise.net>
2. Company ID
3. API public key
4. API private key

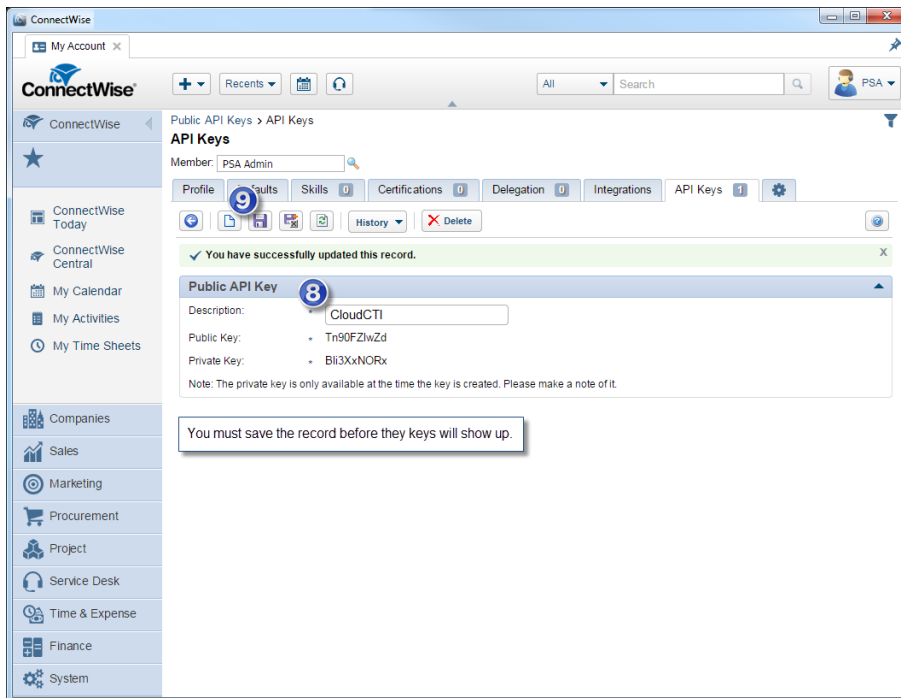
The API keys can be obtained via your user account configuration



In order to make tab "API keys" visible









Create an API Key record for and name it e.g. "CloudCTI"

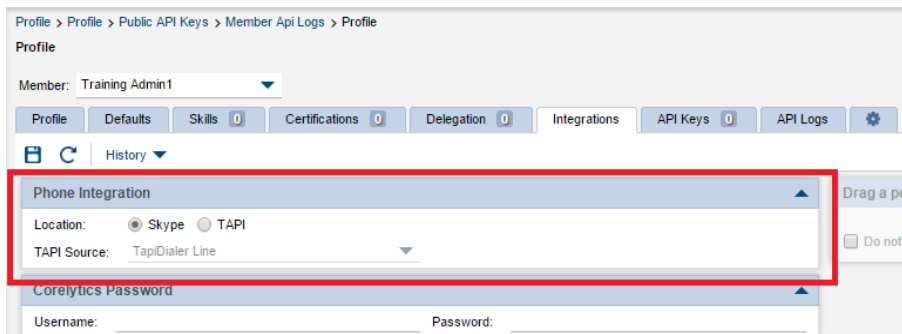


## Notes

Dial from ConnectWise is easy, just click on a phone number hyperlink to dial. The first time your browser may request your permission to associate 'skype:' uri links with MakeCall.exe. Please note that in case Skype or MS Office 365 / Lync is installed, the skype uri handling is overridden by these applications. In any case you can select a phone number and dial with the client hotkey (PAUSE).

AdministrationRes...	 <a href="tel:(763)421-5510">(763) 421-5510</a>	<a href="http://aeroberts.com">http://aeroberts.com</a>	Clearwat
AlliedExecutives	 <a href="tel:(651)735-0740">(651) 735-0740</a>		Clearwat
AlovetInc	 <a href="tel:(651)994-1800">(651) 994-1800</a>		Clearwat
ALSAssociation	 <a href="tel:(612)672-1114">(612) 672-1114</a>	<a href="http://www.alsmn.org">http://www.alsmn.org</a>	Clearwat
ArtsMidwest	 <a href="tel:(612)341-0755">(612) 341-0755</a>	<a href="http://www.artsmidwe...">http://www.artsmidwe...</a>	Clearwat
ArtSpace	 <a href="tel:(612)333-9012">(612) 333-9012</a>	<a href="http://www.artspaceus...">http://www.artspaceus...</a>	Clearwat
BarbaraHoveandA...		<a href="http://www.barbaraho...">http://www.barbaraho...</a>	Clearwat
BarthelmeD...		<a href="http://www.barthelme...">http://www.barthelme...</a>	Clearwat

Note: In your profile settings tab "Integration" the phone integration must be set to use Skype.



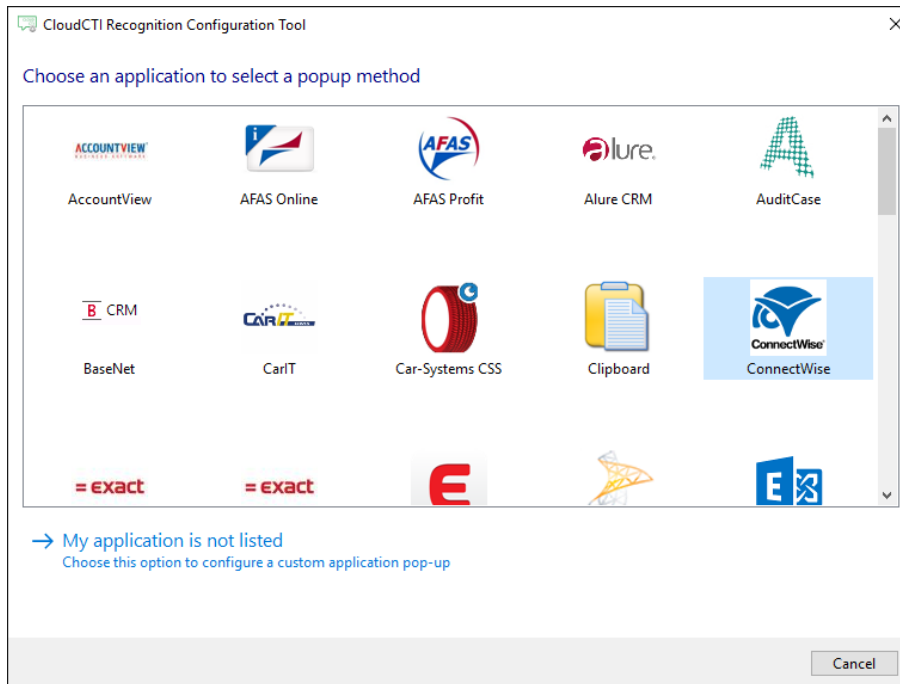
The screenshot shows the 'Profile' settings page for 'Training Admin1'. The 'Integrations' tab is selected. The 'Phone Integration' section is highlighted with a red box and shows the following configuration:

- Location:  Skype  TAPI
- TAPI Source: TapIDialer Line

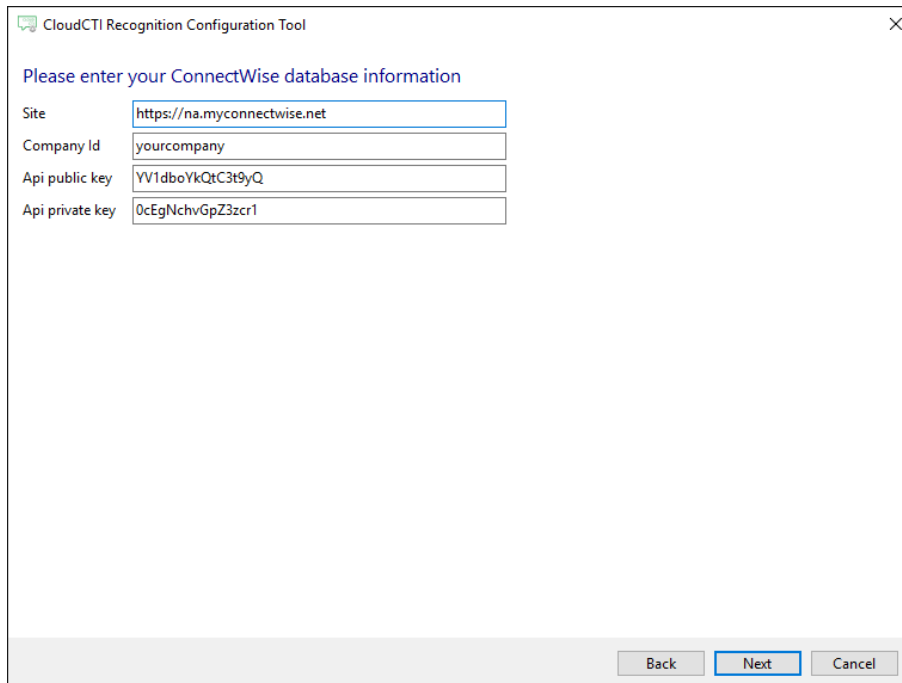
Below this section, the 'Corelytics Password' section is partially visible, showing fields for Username and Password.

## 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 'ConnectWise', as shown below.



- 2) Enter the ConnectWise details to access the data from your account.  
Click 'next' to continue



CloudCTI Recognition Configuration Tool

Please enter your ConnectWise database information

Site:

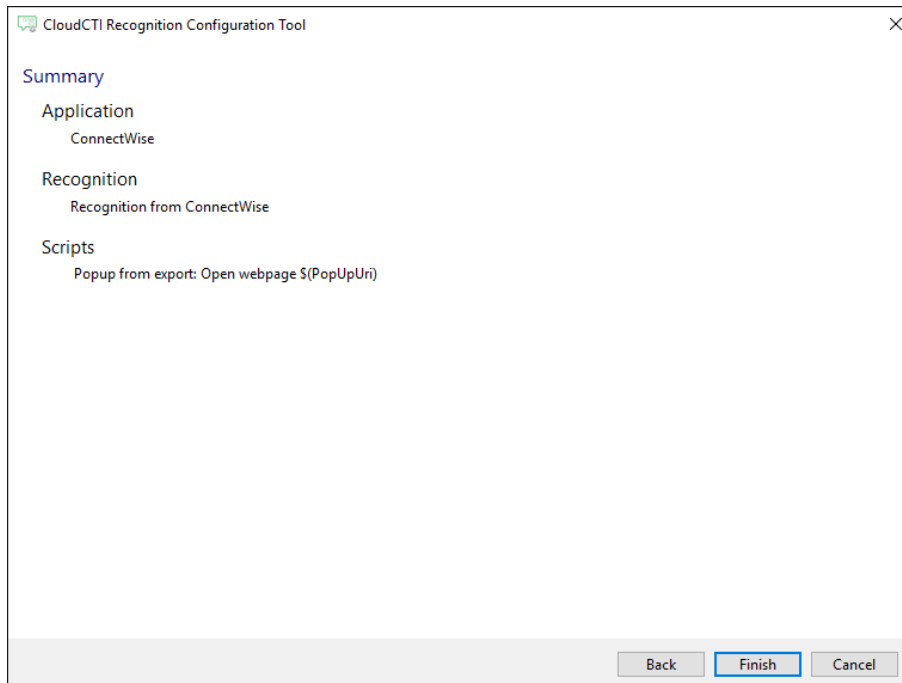
Company Id:

Api public key:

Api private key:

Buttons: Back, Next, Cancel

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



CloudCTI Recognition Configuration Tool

Summary

Application  
ConnectWise

Recognition  
Recognition from ConnectWise

Scripts  
Popup from export: Open webpage \$(PopUpUri)

Buttons: Back, Finish, Cancel