



How to configure caller recognition and screen-pop for:

Insightly

Supported versions: Insightly
Contact replication method: REST API
Screen pop method: URI

Prerequisites

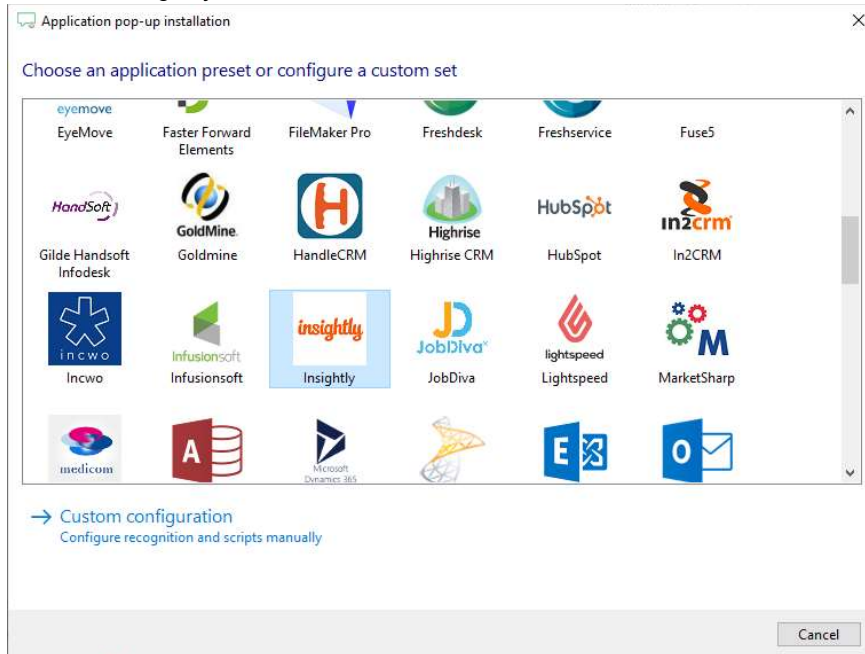
The Insightly API is used for contact data replication. To use this, you need an API key. You can find your API key by going to your 'User Settings' and scrolling to the 'API KEY' section.

Notes

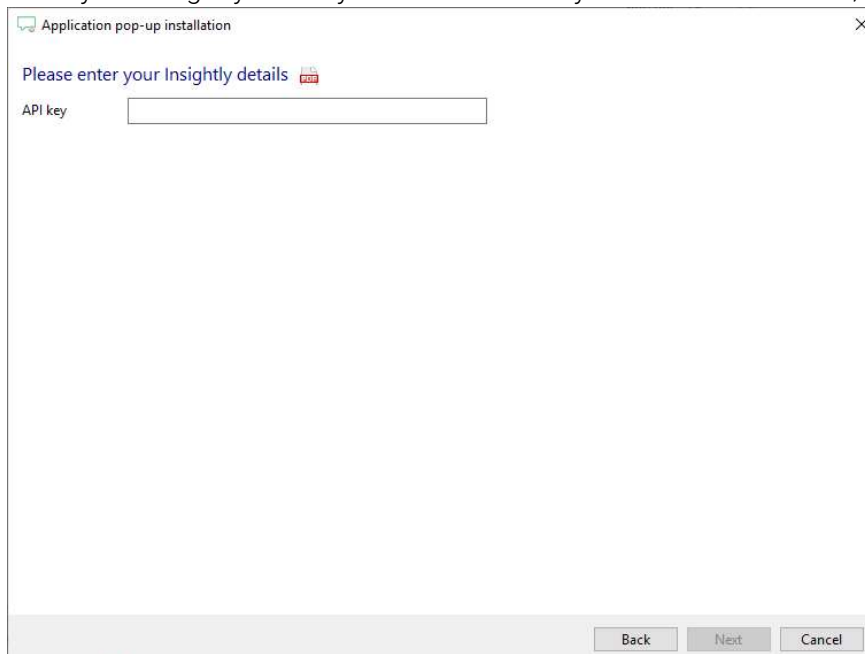
For outbound dialing, simply select a phone number and press <Pause> (default hotkey).

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 'Insightly', as shown below.



- 2) Enter your Insightly API Key to authorize the synchronization service, press "Next".



- 3) The CTI Wizard automatically detects the phone number fields. The content of these columns will be indexed for matching the phone number of an incoming call.

Application pop-up installation

Configure the recognition fields

Identifier	DisplayName	WorkPhone	MobilePhone	HomePhone
Custom field	Name	Phone number	Phone number	Phone number
292294511	Aaron Lang	+316564367228		
292294512	Albert Lee	+319708058725		
292294513	Barbara Lane	+314191762116		
292294514	Carlos Smith	+315739579840		
292294515	Chris Chen	+314978891015		
292294516	Cynthia Allen	+313473695259		
292294517	Jason Castillo	+315624280032		
292294518	Katherine Warren	+316268471294		
292294519	Katherine Reyes	+34622050858		
292294520	Lisa Parker	+315102663583		
292294521	Maria Nichols	+312025550153		
292294522	Mark Sakda	+313349091658		
292294523	Nicholas Flores	+442071234567		
292294524	Nicole Gomez	+317143249472		
292294525	Paula Oliver	+317816234369		
292294526	Roger Mills	+312064991861		
292294527	Samantha Wright	+81152151748		
292294528	Terry Thomas	+85226765046		
292294529	Tina Martin	+314104743433		
292294530	Wayne Miyazaki	+315059937305		
137860960	Clampett Oil and Gas Corp	+316268471294		
137860961	Clampett Oil and Gas, Sing	+316564367228		
137860962	Clampett Oil and Gas, UK	+442071234567		
137860963	Cyberdyne Systems Corp.	+317143249472		
137860964	Globex	+319708058725		

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

Application pop-up installation

Client call notification

Configure the information you want the client to show when a caller is recognized from this set

Incoming call

Contact name: **DisplayName**

Number: **Caller number**

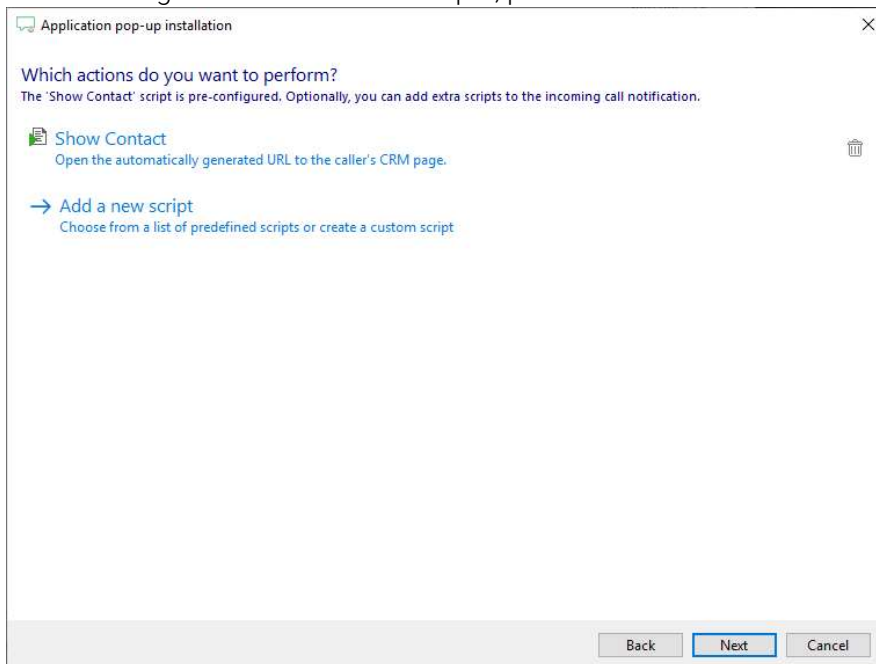
Source: **Application name**

* Windows allows a maximum of 255 characters

Add recognition field Add call field

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5) You can change or add additional scripts, press 'Next' to continue.



6) Check the configuration summary and click finish to add the recognition from Insightly.

