

How to configure caller recognition and screen-pop for:

PerfectView CRM Online

Supported versions: PerfectView CRM Online API v1.1 and above

Contact replication method: PerfectView API

Screen pop method: Url

Prerequisites

CloudCTI connects to the PerfectView API. To enable API access, log on to PerfectView CRM Online using the administrator account.

Go to Settings > Connectors > API > Settings. Enable the API, then download the “PerfectView Api Credentials.xml” XML keyfile. The CloudCTI Wizard will prompt for the XML file during configuration.

The screenshot displays the PerfectView CRM Online interface. The top navigation bar includes the 'perfectview' logo, a search bar with the text 'search a relation', and a user profile icon. The main content area is titled 'Settings' and features a sidebar on the right. The sidebar contains a list of settings categories: 'Importing data', 'Personal settings', 'Application settings', 'Connectors', 'General', 'Social media', and 'API'. The 'Connectors' and 'Settings' items are highlighted with red rectangular boxes. The main content area shows the 'API' settings, which are checked. Below the 'API' checkbox, there is a descriptive text: 'With the API (Application Programmer Interface) a programmer can access PerfectView functionalities through an external application.' Below this text are three input fields: 'API key' (containing 'df1d8bfa-3707-4183-9b1f-957d5a3bdc52'), 'Database id' (containing '662f8511-94c2-4b34-9c34-2cdd8137b3e4'), and 'User id' (containing '8b8bf886-7c15-4e07-bd1e-a0db1c41a42a'). There are two buttons: 'Key file download' and 'Refresh API key'. At the bottom, there is a dropdown menu labeled 'E-mail Api problems to'.

Notes

Click-to-dial is enabled by default. Click on a telephone number to start a call.

PerfectView



supplier

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info@perfectview.nl

<http://www.perfectview.nl>

Visiting address

De Waterman 2

5215 MX 's-Hertogenbosch



Details

Contacts [7]

Activities

Characteristics

Campa

all activities ▾

Add

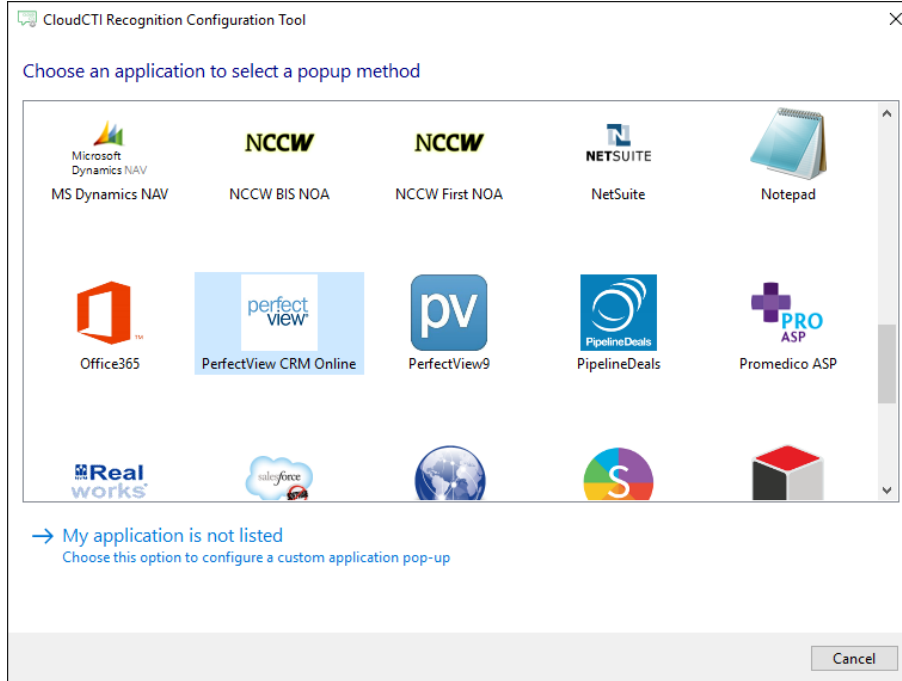
Actions ▾



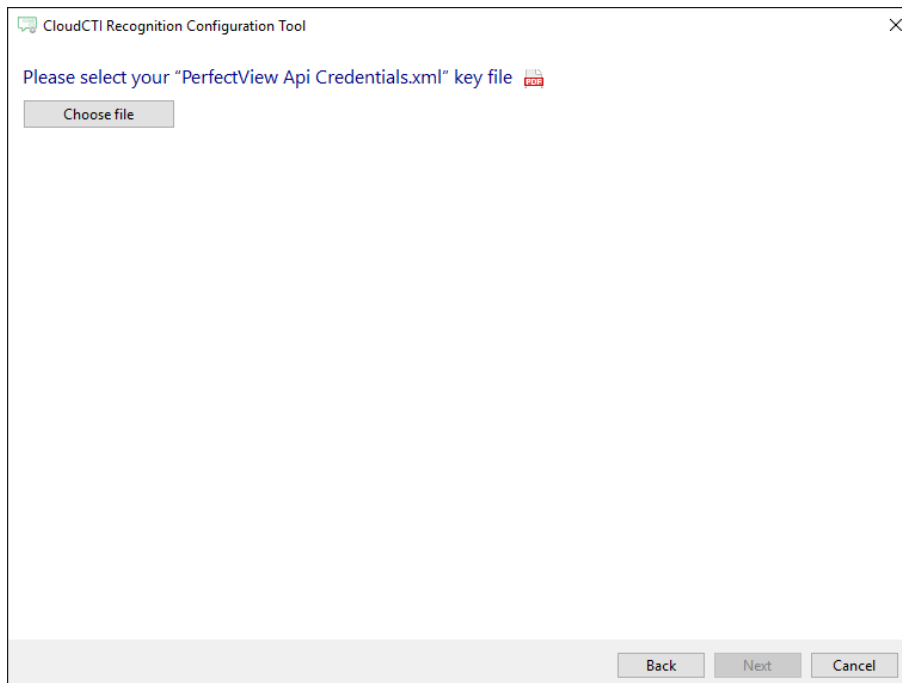
No data

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 'PerfectView CRM Online', as shown below.



- 2) Import the "PerfectView Api Credentials.xml" you have obtained from the prerequisites section in this document. The Wizard verifies the data. Click 'Next' to continue.



- 3) Check the configuration summary and click finish to add the recognition from PerfectView CRM Online.

