CRM INFO

How to configure caller recognition and screen-pop for:

Sharpspring

Supported versions: Sharpspring Contact replication method: Sharpspring API Screen pop method: Url

Prerequisites

User account with access to an Account ID and secret key.

To access SharpSpring's API and create API keys, do the following:

1. In SharpSpring's top toolbar, click

User Settings > Settings.

- 2. In the left panel, under SharpSpring API, click API Settings.
- 3. Access your SharpSpring API keys under Account ID and Secret Key.

Configuration steps

1) Start by clicking 'add recognition' in the <u>Recognition Configuration Tool</u> (this is done automatically if no configuration has yet been configured). From the list of applications, choose 'Sharpspring', as shown below.

Pipedrive	PipelineDeals PipelineDeals	Promedico ASP	works [®] Realworks	RPM Telco	Sage CRM	
saleyforce	SAP Anywhere		S			
Salesforce	SAP Anywhere	Sharpspring	Simplicate	SugarCRM 7	SugarCRM Community	
	suite (CRM	00	00	Syntess Atrium		
ugarCRMOnline	SuiteCRM 7	SuperOffice Online	SuperOffice7 Windows	Syntess Atrium Professional	Teamleader	
	Diac	$\langle \Diamond \rangle$	Markhoole ann		ZOHO	
Custom cor Configure reco	nfiguration	manually				



Application pop-u	up installation	×
Please enter you	r Sharpspring account ID, secret key and URL	
Account ID		
Secret key		
URL	https://test.marketingautomation.services/	
		Next Car 1
	Back	Next Cancel

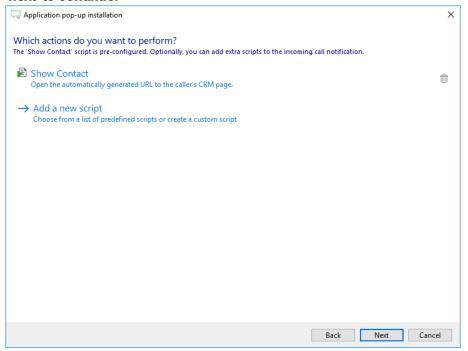
2) Enter your Sharpspring Account ID, secret key and URL. Press 'next' to continue.

3) 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	
Back Next Cance	



4) After you have configured the default script you can add more scripts if desired or click 'next' to continue.



5) Check the configuration summary and click finish to add the recognition from Sharpspring.

Galaction pop-up installation	×
Summary	
Application	
Sharpspring	
Recognition	
Recognition from Sharpspring	
Scripts	
Show Contact: Open webpage \$(PopUpUri)	
	Back Finish Cancel