



How To Guide

01

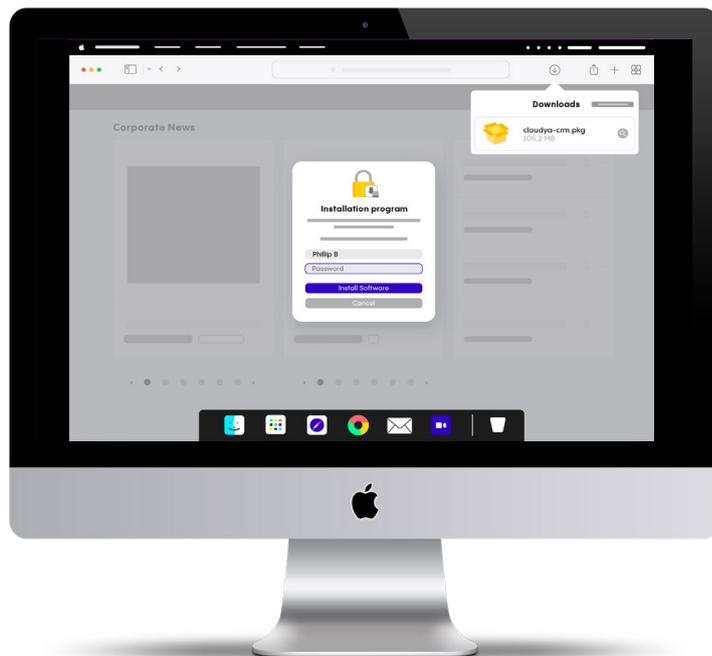
Download the latest Cloudya CRM Connect desktop app at:
<https://www.nfon.com/en/service/downloads>

02

Unpack the Cloudya Zip file and open the Cloudya installation package. Then drag and drop the Cloudya icon into the Applications folder and it will install automatically.

Alternatively, simply open the Cloudya installer and Cloudya and CRM Connect will install automatically.

During installation, you will be asked three times for your Admin password which you'll need to confirm on each occasion.



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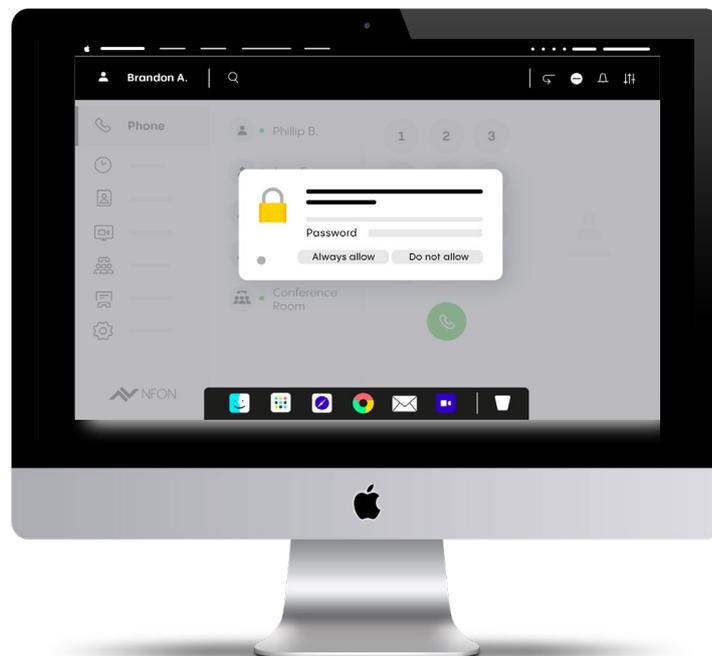
03

Once installation is complete, go to your Launchpad. Open Cloudya and log-in if not already done so.

A pop-up will then appear requesting you to define a private key in mac keychain.

Click on 'Settings'. After about a minute, you'll see 'CRM Connect' appear under 'Settings'.

(Please note, after starting Cloudya for the first time, you'll be asked for your 'Private Key'. Please click 'Always allow'.)



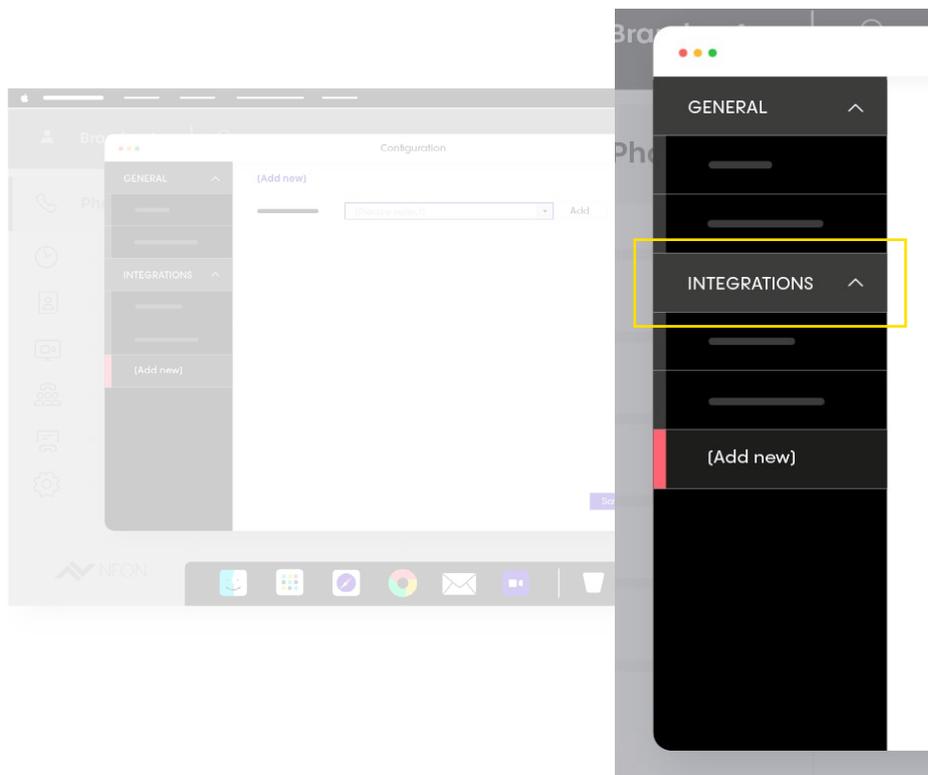
04

Click on 'CRM Connect' to start configuring your CRM integration.

Click on 'Open CRM Configurations'.

OPEN CRM CONNECT CONFIGURATION

A new window will open. CRM integrations can be configured in the "INTEGRATIONS" section. Select your CRM application to connect it with the software partner API or CTI client.

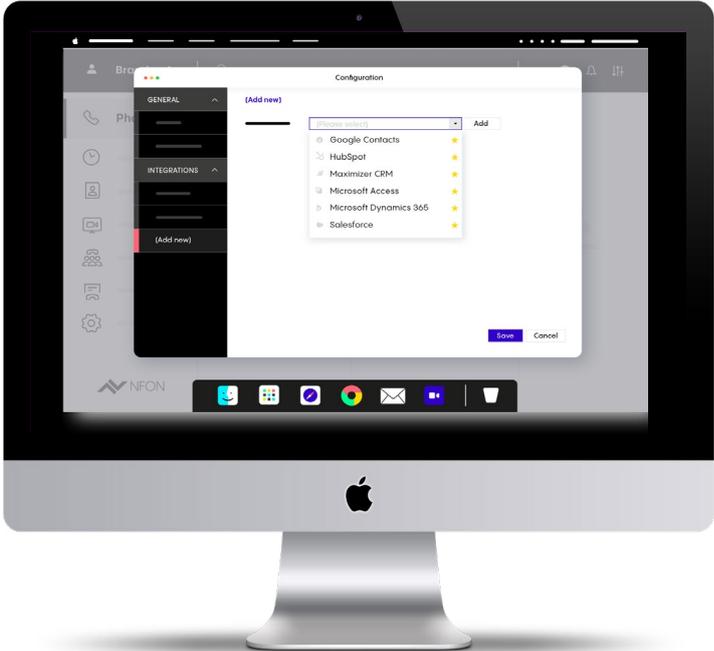
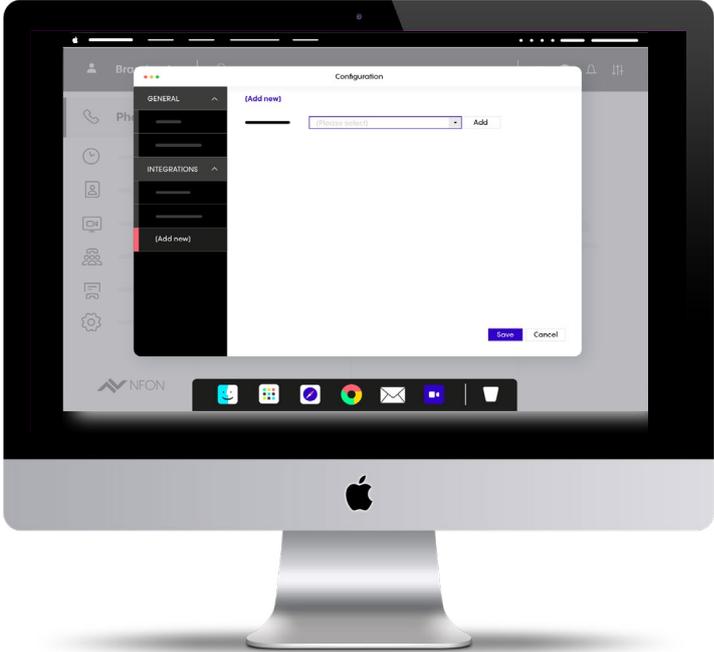


Incoming telephone numbers are then automatically matched to the contact records in the connected CRM application.

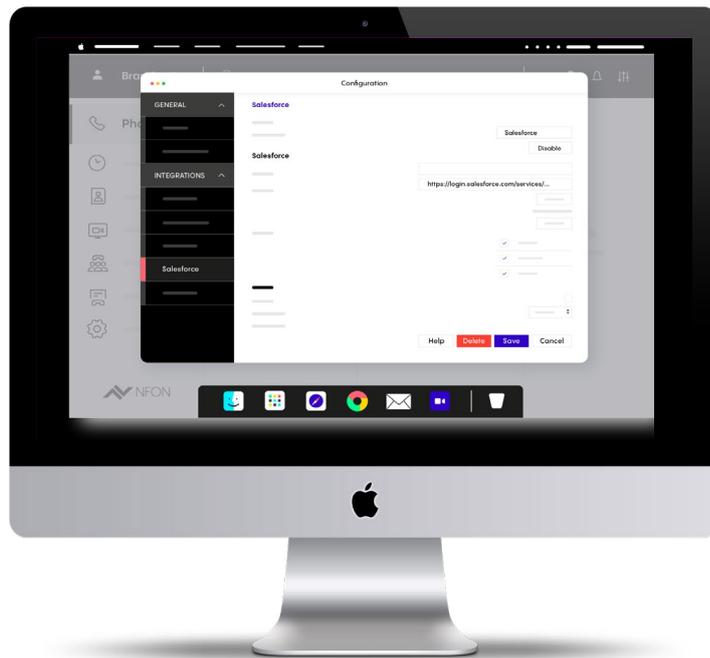
This enables functions such as contact screen pop and address book searches to be performed through the Cloudya desktop app.

05

To add a new CRM integration, select '(Add new)':
Select the correct application from the list, and then select Add.



You will see a configuration page which shows the information required for completing the integration.



For each integration listed, a detailed step-by-step guide is available via the Help button (example shown for Salesforce): After carrying out the configuration steps detailed in the Help Guide, select Save to complete the setup. You can use **Cancel** to abandon the configuration of a new integration, or use **Delete** to remove a previously configured integration.