NFON CRM Connect

How To Guide

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

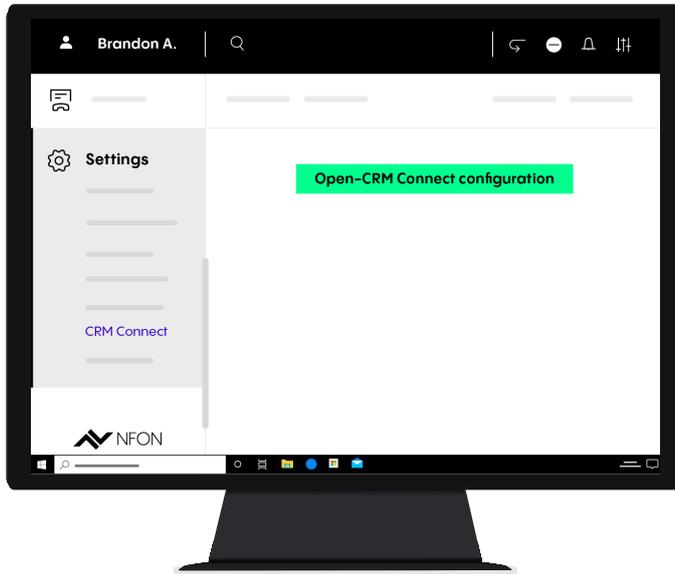**02** Open the Cloudya installer. Cloudya and CRM Connect will be installed automatically.
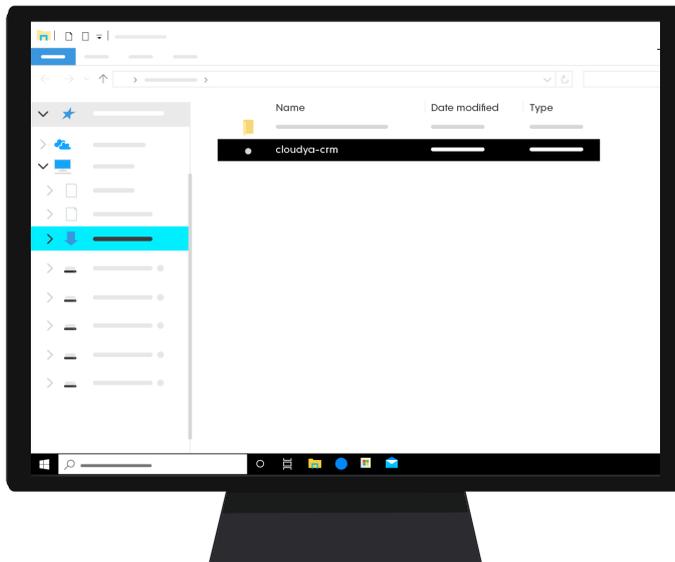
03 Once installation is complete, the Cloudya app will open.
Log in to the Cloudya app and open 'Settings'.
After about one minute, 'CRM Connect' will appear under 'Settings'.

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 as below. 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 or outgoing 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 telephone software client.
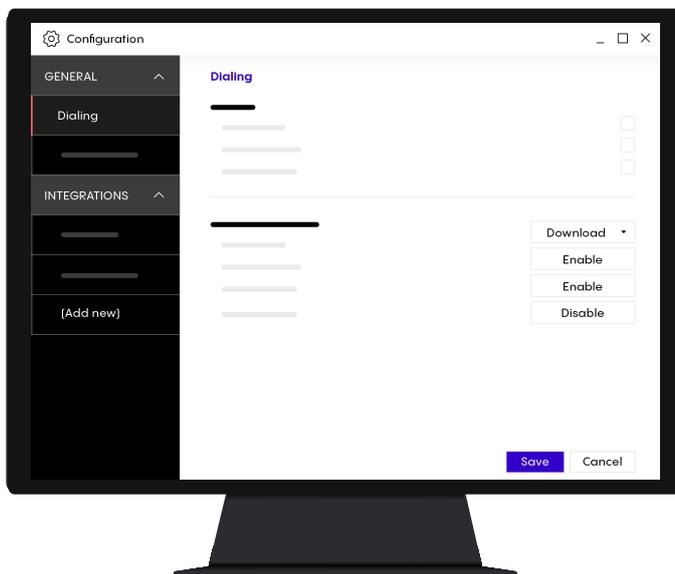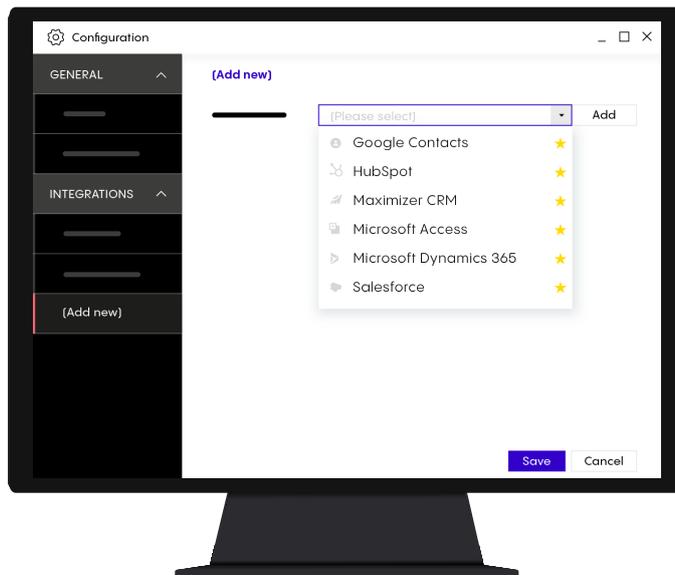
05

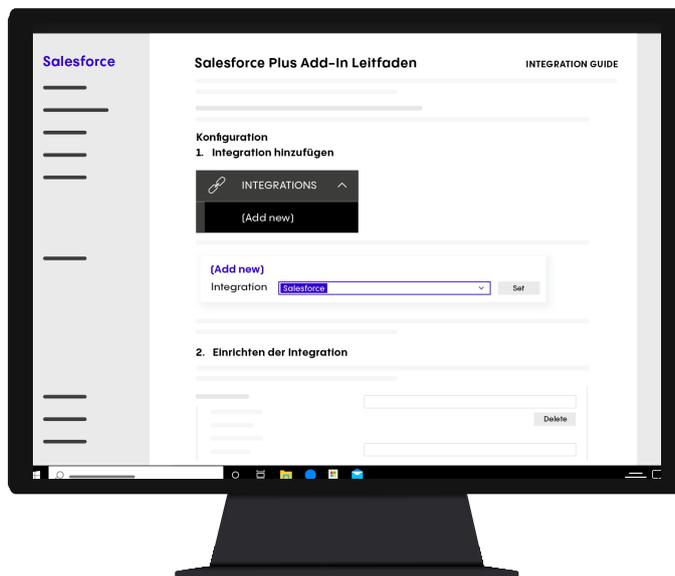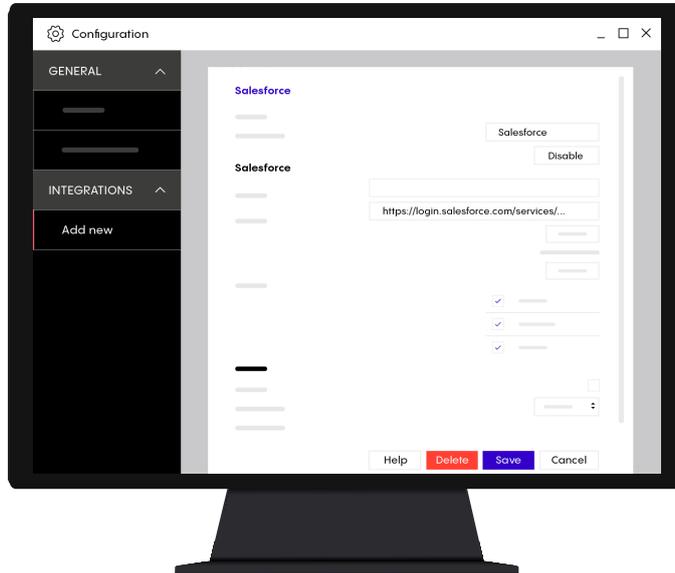To add a new CRM integration, select '(Add new)':
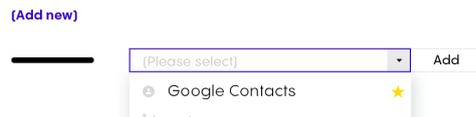
Select the correct application from the list, and then select Add.

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

NOTE: Only supported integrations will appear in the drop-down list. Check the table (Page 5) for the supported CRM integrations.

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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.

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CRM Connect Supported Integrations

Feature	CRM Connect	CRM Connect Plus
Compatible with Windows (32/64bit)	8/10	8/10
Compatible with Microsoft Office 2013 (32/64bit)	✓	✓
Compatible with Microsoft Office 2016 (32/64bit)	✓	✓
Compatible with Microsoft Office 365 (32/64bit)	✓	✓
Compatible with Apple Address Book (MAC client only)	✓	✓
Google Contacts Compatibility	✓	✓
Integratable applications	Microsoft Outlook Google Contacts	Hubspot Maximizer CRM Microsoft Access Microsoft Dynamics 365 CRM NetSuite Outlook Web Access Salesforce Sugar CRM 4me Zendesk Zoho CRM Act 2010+ Autotask Call Connect GP (Patient Connect) Candor Carerix ConnectWise DATEV Dezrez Egroupware Envoy TAXI Exact Online FlexKIDS GoldMine Halo Service Desk Infor CRM /Saleslogix JobDiva LDAP Logical Office Lotus Notes Maximizer Microdec Microsoft Dynamics NAV ODBC OnContact PCHomes Perfect View QuickBooks Online QV Accelerate ReallySimple Systems Rezi Robin HQ RPM Sage 50 Accounts Salos AutomaaT Go Salpo CRM ServiceMax / MobileMax Service Simplicate SuperOffice CRM SuperOffice CRM Web Client Teamleader TechMan Garage Management System Titan UC Server Vtiger Websolve WinSIMS Workbookds Yoobi
Terminal server enabled	–	–
TAPI interface	✓*	✓*
Subnetting support	✓	✓
One-off cost	no one-off cost	no one-off cost
Monthly cost	Included with Business Premium & Business Standard+ Mobility Option	Monthly usage cost per user

Can't find your CRM on the list?
No worries! We help you with an
on-demand request

*TAPI interface for outbound telephony available by default.