# Wave Desktop CRM Add-ins - User Guide

# **OVERVIEW**

Customer Relationship Management (CRM) is centered on the management of customer data and helps the enterprise to keep updating the contact information of the customers to the latest and track each interaction between the enterprise and the customers, which promotes the business relationship between the enterprise and the customers and help the enterprise to grow.

The Wave application integrates third-party applications and connects to the CRM system through the add-ins: ACT! CRM, Bitrix24 CRM, Dynamics 365, Freshdesk CRM, Hubspot CRM, Salesforce CRM, Sugar CRM, Vtiger CRM, Zendesk CRM, and Zoho CRM. Users can select and download the add-ins. After installing the add-in, the user can connect to the CRM system through the Wave application to enhance communication and contact with customers.

This document introduces how to install and use a CRM system through the Wave application.

By installing and logging in to the CRM system on the Wave Desktop application, you can obtain the following features:

- When receiving an incoming call or making an outgoing call, the customer information in the CRM system will be automatically matched, and the customer's business card (customizable) will be displayed.
- During a call through the Wave Desktop application, you can quickly access the customer's details page so that you can maintain the customer profile in the CRM system.
- For the unknown incoming call number on the Wave Desktop application, you can quickly add the contact to the CRM system.
- The call records on the Wave Desktop application can be synchronized to the CRM system.
- Quickly log in to the CRM system through the Wave Desktop application with one click.

Before using the CRM add-in, you need to configure and log in to the CRM system on the Wave Desktop application:

- Configure ACT! CRM System
- Configure Bitrix24 CRM System
- Configure Freshdesk CRM System
- Configure HubSpot CRM System
- Configure Salesforce CRM System
- Configure Sugar CRM System
- Configure Vtiger CRM System
- Configure Zendesk CRM System

• Configure Zoho CRM System

Configure Dynamics 365 CRM System

Important

Please note that to be able to use this feature, the UCM should have a paid RemoteConnect plan. For more information, please refer to:

https://ucmrc.gdms.cloud/plans

# USING CRM ADD-IN ON WAVE APP

## Prerequisites

- 1. You need to purchase a UCM RemoteConnect plan for your UCM device, and the purchased plan must contain Full Integrate API and 3<sup>rd</sup> Party Add-ins. Please click here to view the UCM RemoteConnect plan details.
- 2. You must have an account with the corresponding CRM system. Some CRM systems require a plan before using the service. You can visit the official website of the corresponding CRM system for more information.

## Download Add-in

Users can access to "Application" interface, and click to enter the "App Store" menu, it will display all CRM systems currently supported in the Wave application, including ACT! CRM, Bitrix24 CRM, Freshdesk CRM, Hubspot CRM, SalesForce CRM, Sugar CRM, and Vtiger CRM, Zendesk CRM, and Zoho CRM. Users can select to install the preferred CRM system add-ins by clicking the "Install" buttons corresponding to the CRM systems, and the CRM system add-ins will be downloaded to the local desktop. Then, users can log in to the CRM systems, as the screenshot shows below:



## Display CRM Contact Information When Receiving Calls

After logging into the CRM system, the user can invoke the CRM system when there is an incoming call to Wave application, or during an active call. Please

refer to an example below for the Zoho CRM system (the operations in other CRM systems are the same):

The user has already logged into the Zoho CRM system, and when there is an incoming call in the Wave application, the contact card will be displayed in the bottom left of the Wave application interface. Please see the screenshot below:



Zoho CRM Contact Card

The user can click on the "Details" option to access the details page of the corresponding customer in the CRM system. Please refer to the details page of the customer in the Zoho CRM system:

CRM Home Leads Cor	ntacts Accounts Deals Calls Tasks Meetings Reports Feeds Campaigns Documents Visits Projects	Free UPGRADE   오 수 탑 🖬 🗃 🕸   📄 🗰
← S suqin huang - A	ABC Company	Send Email Edit
Related List	Overview Timeline	Last Update : a while ago
Notes		î
Attachments	Contact Owner mhong	
Deals	Email huang@test.com	
Open Activities	Phone 15355497048	
Closed Activities 2	Mobile –	
Emails	Department Business Department	
Campaigns		
Reporting Contacts		
	<ul> <li>Hide Details</li> </ul>	
	Contact Information	
	Contact Owner mhong Lead Source –	
	Account Name ABC Company Contact Name sugin huang	
	Email huang@test.com Department Business Department	
	Title – Home Phone –	
	Phone 🕓 15355497048 Fax -	
	Other Phone – Date of Birth –	
	Mobile - Asst Phone -	
	Assistant – Email Opt Out –	
	Skype ID Created By mhong	
		0 0 0 0 0

Zoho CRM Contact Detail

After logging into the CRM add-in, the user can customize the information that needs to be displayed on the business card information of the card. After setting it up, the business card of the contact will display the corresponding customized information during a call. Please refer to the screenshot below:

oho CRM		- 0
afei has	logged in	Log out
Sync Wave call h	istory to CRM system	
Contact card inf	formation	
information 1	Name	~
information 2	Phone	~
information 3	Email	~
information 4	Company	~
mormation 4		

Customize Business Card Information

© ZohoCRM	×
ye xy	
3186 Chelsea@amail.com	
accounting	
	Details

Business Card Information of Contact

## Add Contact to CRM System

If the incoming call number or outgoing call number does not exist in the CRM system, the user can click the "Add Contact" button in the screenshot below to add the contact to your CRM system. Please refer to the example below – adding a contact to the Zoho CRM system:

© ZohoCRM	×
1249	
	Add Contact

Add Contact to CRM System

CRM Home Le	ads Contacts	Accounts	商机	Calls	Tasks	会议	Reports	动态	Campaigns	文档	访问				
Create Contact									Cancel	Save & New	Save				
Contact 图片															
Contact Information															
Contact Information															
Contact Owner	afei					8				Lead Sour	rce	-None-		Ŧ	
First Name	-None- T	errance								Last Na	me	Wang			
Account Name										Departme	ent	BI			
Email	Terrance@pwc.	com							,	Home Pho	one	(0251)54874618			
Title	software engine	er								F	Fax				
Phone	1249								c	Date of Bi	irth	1986-03-12			
Other Phone										Asst Pho	one				
Mobile									Er	nail Opt C	Dut [				

Zoho CRM – Create Contact

After the contact has been added, the contact information saved in the CRM system will be displayed when new incoming call come from this number.



Zoho CRM Contact Card

## Auto Create Contact in CRM System

When this option is enabled and the user ends a call with a customer whose number is not registered in the CRM database. The number will be added automatically to the CRM database as the call record is synchronized to the CRM system (The option "Sync Wave Call History to CRM" has to be enabled before the call).

<sup>1.</sup> After logging in to the CRM add-in successfully, you can set the following features:



Enable Auto-Create Contact in CRM System

2. Select the option "Auto Create Contact to CRM", and you will see the following page:

create new contact to chim	
Auto create new contact	C
* Create Contacts on Call Direction	
All	$\sim$
* Contact Contact or Lead	
Contact	$\sim$
* New Contact First Name	
Wave [Number]	
* New Contact Last Name	
New	

Create New Contact to CRM

Users can modify the information above, and enter the parameters below. Parameters need to be circled with []:

Please note that in order to use this feature, Wave Desktop client version should be 1.0.23.12 or later.

## Synchronize Wave Call Records to CRM System

After logging in to the CRM system, the user can enable the option to synchronize Wave call records to the CRM system. Once the option has been enabled,

the current call record will be synchronized to the CRM system after the Wave call. The user can log in to the CRM system to view the call record.

🏷 Hubspot	-		×
< Sync Wave call to CRM			
Synchronize wave call records to CRM system			)
* Call Subject			
Wave PhoneSystem Call			
* Answered Inbound Call			
[DateTime]: Answered incoming call from [N	umber]	[Name	
* Missed Call			
[DateTime]: Missed call from [Number] [Nam	ie] to [A	gent]	
* Answered and Unanswered Outbound Call			
[DateTime]: Answered outgoing call from [Ag	gent] to	[Numł	

Enable "Synchronize Wave Call Records to CRM System" Option

Users can modify the information above, and enter the parameter below. Parameters need to be circled with []:

OCRM Home Leads Contacts Accou	unts 南	机 Calls Tasks 会议	Reports 动态 Campaigns	文档 访问			Free UPGRADE	Q∴⊂∎⊡	\$ I 🔲 🏭
All Calls 👻								Create Call	Actions 👻
Total Records 2							10 R	ecords per page 💌 🔹	1-2 < >
Filter Calls by		Subject All -	Call Type	Call Start Time	Call Duration	Related To	Contact Name	Call Owner	==
Q Search		Terrance Wang 's call.	呼入	17/03/2022 02:01 PM	02:26		Terrance Wang	afei	
▼ System Defined Filters		Terrance Wang 's call.	错过的	17/03/2022 02:00 PM	00:00		Terrance Wang	afei	
Touched Records									
Untouched Records									
Record Action									
Related Records Action									
✓ Filter By Fields									
Call Duration									
Call Duration (in seconds)									
Call Owner									
Call Purpose									
Call Result									
Call Start Time									
Call Type									
Contact Name									
Created By									
Created Time									
Modified By									
Modified Time									
Related To									
Scheduled in CRM									
Subject									
								0 12	ତ ତ

Zoho CRM Call Records

Only if the current number already exists in the CRM system, the call record synchronized to the CRM system after the call ends.

Please note that in order to use this feature, Wave Desktop client version should be 1.0.23.12 or later.

## Login to CRM System by One-Click

On the "Application" page of the Wave Desktop application, the user can click the CRM system icon and access the corresponding settings page. For example, the user can click the ""Go to Zoho CRM" button on the bottom of the pop-up window and quickly log in to the Zoho CRM system web page. Please refer to the screenshots below:

Grand	lstream Networks, Inc.		— 🗆 X
	Personal Data		
وم Chats	CDR CDR	Coho CRM	5
Contacts	Fax Files	mhong has logged in	
Calls	Additional Features	Sync Wave call history to CRM system	
(1) L_1 Meetings	Fax Sending	Contact card information	
	Smart Devices	information 1 Name V	
	Door System	information 2 Phone (CTI)	
	3rd Party Applications	information 3 Company V	
	App Store	information 4 Department · · · · · · · · · · · · · · · · · · ·	
	-	information 5 None	
<b>F</b> 6	ZohoCRM	Go to ZohoCRM	
Application			
		Zoho CRM Settings	
	iome Leads Contacts Accounts Deals	Calls Tasks Meetings Reports Feeds Campaigns Documents Visits Projects	a ¢   Ⅲ

Due Date         Status         Priority         Related To         Contact Name           Feb 21,2022         #.kaiv         ff         Bit #thammed for the field for th	ly Open Tasks						My Meetings					
Feb 21.2022       未启动       低       回 言样知意景教       ① 武旗样 法       ○ 古程       ○ 武旗 林 二       ○ 武 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 三       ○ 三 二       ○ 三 三       ○ 三 三       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二 ○ 三 三       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二 ○ 三 三       ○ 三 二       ○ 三 三       ○ 三 三       ○ 三 三       ○ 三 二       ○ 三 二       ○ 三 二       ○ 三 二 三       ○ 三 三 三       ○ 三 三 三       ○ 三 三	Subject	Due Date	Status	Priority	Related To	Contact Name	Title	From	То	Related To	Contac	t Name
Feb 23, 2022       進行中 常規       ① 片料       ① 白料       ① 白料       ● 白       ● 白       ● 日<	主册即将到来的CRM 网络研讨会	Feb 21, 2022	未启动	低	🌆 吉祥如意餐饮	🕥 欣然 王	演示	Feb 21, 2022 09:41 PM	Feb 21, 2022 09:46 PM	🔂 风云游戏		
Reb 19,202       未启动 蕉高 ① 说鲜桃花相微公狗 ① 滋利         Feb 20,2022       未启动 蕉 ② 时期集团 ① 景致涂         Feb 22,2022       进行中 蒿 ② 首行设计 ① 再刻         Feb 22,2022       进行中 蒿 ③ 雪音打線计 ① 再刻         Feb 22,2022       进行中 蒿 ③ 雪音打線計 ② 原為         Feb 22,2022       进行中 蒿 ◎ 雪音打線計 ② 原為         Feb 23,2022       进行中 蒿 ◎ 雪音打線計         Feb 23,2022       进行中 蒿 ◎ 雪音打線音響数         Feb 23,2022       进行中 蒿 愈 雪音         Feb 24,2022       Feb 21,2022 08:41 PM         Feb 21,2022 08:41 PM       Feb 21,2022 08:43 PM         Feb 21,2022 08:41 PM       Feb 21,2022 08:43 PM         Feb 21,2022 08:41 PM       Feb 21,2022 08:43 PM         Feb 21,2022 08:41 PM       Feb 21,2022 08:45 PM         CN 08#####       Feb 21,2022 08:45 PM         Feb 21,2022 08:45 PM       Feb 21,2022 08:45 PM         Feb 21,2024       Feb 21,2022 08:45 PM         Feb 21,2025       Feb 21,2022 08:45 PM         Feb 21,2025       Feb 21,2025 PM         Feb 21,2025       Feb 21,2025 PM	RM参考视频	Feb 23, 2022	进行中	常规	🔁 兴时科技	● 舟程	网络研讨会	Feb 21, 2022 11:41 PM	Feb 21, 2022 11:48 PM	围 西行设计		
Feb 20, 2022       未启动 低 □时捐集团 □ 景致涂       ● 服金分证券       Feb 21, 2022 10:41 PM Feb 21, 2022 09:47 PM □ 金分证券       □ 金分证券         Feb 22, 2022       进行中 高 □ 当时如要做 □ 成然王       ● 放客户合议 Feb 21, 2022 09:41 PM Feb 21, 2022 09:47 PM □ 金纳钱有限公司       ● 放客户合议 Feb 21, 2022 09:41 PM Feb 21, 2022 09:47 PM □ 金纳钱有限公司         Feb 23, 2022       进行中 常规 ● 豪季       ● 加索 中合议 Feb 21, 2022 09:41 PM Feb 2	竞争对手对比文档	Feb 19, 2022	未启动	最高	🔓 飞鸽科技有限公司	()强刘	展会	Feb 22, 2022	Feb 22, 2022	🔂 银实集团		
Feb 22, 2022       进行中 常规	快取经理审批	Feb 20, 2022	未启动	低	🔓 时雨集团	🕥 景致 涂	网络研讨会	Feb 21, 2022 10:41 PM	Feb 21, 2022 10:49 PM	🎟 金方证券		
Feb 22, 2022 进行中 常规 @w 晨李       ●数案户会说 Feb 21, 2022 Feb 21, 2022 08:46 PM 通兴时科技         (10 10)       ●数案户会说 Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 通兴时科技         (10 10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 通兴时科技         (10 10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM Feb 21, 2022 PM Feb 21, 2	厌取经理审批	Feb 22, 2022	进行中	常规	🖨 西行设计	() 南刘	研讨会	Feb 21, 2022 09:41 PM	Feb 21, 2022 09:47 PM			
Feb 23, 2022 进行中 常规 @ 桌李       CRM 网络研讨会 Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       Feb 21, 2022 08:41 PM Feb 21, 2022 08:46 PM 含 光時料技         (11:10)       My Deals Closing This Month         (11:10)       No Leads found.	天取经理审批	Feb 22, 2022	进行中	高	<b>曲</b> 吉祥如意餐饮	○ 欣然王	参加客户会议	Feb 21, 2022	Feb 21, 2022	🔓 飞鸽科技有限公司		
Image: CRM 52544 #ith:         Feb 21 2022 07:41 PM         Feb 21 2022 07:44 PM         (1)           Image: Closing This Month         Image: Closing Thi	主册即将到来的CRM网络研讨会	Feb 23, 2022	进行中	常规	<b>⑧</b> 晨李		CRM 网络研讨会	Feb 21, 2022 08:41 PM	Feb 21, 2022 08:46 PM	🔁 兴时科技		
No Leads found.						< <b>1</b> to <b>10</b> >	CRM 网络研讨会	Feb 21-2022 07-41 PM	Feh 21-2022 07-44 PM			< <b>1</b> t
No Leads found.	day's Leads						My Deals Closin	g This Month				
No Leads found. No Deals found.												
			No Leads f	ound.					No Deals found.			

Zoho CRM System Page

## Update Add-in

If there is a new version for the current CRM system add-in, the user can click the button "..." on the right upper corner of the add-in icon, and select the

"Update" button to update the CRM system add-in. Please see the screenshot below:

S wav	'E				— 🗆 ×
<b>W</b> ,	Personal Business				
ومی Chats	CDR CDR	Voicemail	Follow Me	Recording Files	Fax Files
Contacts	SCA SCA				
Calls	Value-added Services				
í i	Fax	Call Queue	Wakeup Service		
	Smart Devices				
	Access Control	O Monitor	Call Equipment (CTI)		
	Administrator				
	Operator Panel				
	Application				
	Marketing	Salesforce	ZohoCRM	9 Ininstall	
Apps			U	pdate	

Update Application

## Stop Running Add-in

If the user does not use the CRM system for a long time, or the user does not need the Wave Desktop application to display the CRM contact card when dialing out or receiving calls, the user can stop running the add-in so that it does not occupy the memory of the computer.

The user can click "…" button on the right upper corner of the CRM add-in icon on the "Application" page, and click the "Stop Running" option to stop running the add-in.



Stop Running Add-in

If the user wants to run the add-in again, the user can click the add-in icon and log in to the CRM system again.

## Uninstall Add-in

If the user wants to uninstall the CRM system add-in, the user can click the button "…" on the right upper corner of the add-in icon and click the "Uninstall" button to uninstall the add-in. Please see the screenshot below:



Uninstall Add-in

# CONFIGURE CRM SYSTEM

## ACT! CRM System

### Login ACT! CRM System through Wave App

1. The user can click to open ACT! CRM add-in in the "App Store" in the Wave application and enter the username and password to log in to the ACT! CRM system.

🤓 Act! CRM	N		-		×
	8	Username			
	A	Password	2	e	
		1.6554010	-77		
	$\odot$	DataBase			
	-				
		Server Address	*		



Log in ACT! CRM System

If you are using Act! Premium (On-premise), please refer to the filling rules below:

If you are using Act! Premium Cloud, please refer to the filling rules below:

2. The user can click the "Log in" button to log in to the ACT! CRM system and the user will see the screenshot below:



Logged in ACT! CRM Successfully

#### Note

Only Act! CRM users who have already purchased the corresponding services can use the Wave application to access to the Act! CRM system. If the Act! CRM plan has expired, and the user cannot access to the Act! CRM system through the Wave application, please contact Act! CRM system administrator to obtain the plan.

## Bitrix24 CRM System

#### **Obtain Webhook URL of Bitrix24 CRM Account**

The user can sign up Bitrix24 CRM account at https://www.bitrix24.net/. If the user has an account for the Bitrix24 CRM system, the user can enter a phone number/email address and password to log in to the system. If the user does not have an account for the Bitrix24 CRM system, the user needs to sign up for a Bitrix24 CRM account. Please refer to the screenshot below:

Bitrix 24°	. back to site	Bitrix24 Registration
		Use your social account to register
Your company. United.		or Enter email



Sign Up for Bitrix Account

1. After logging in Bitrix24 CRM system, the user can click the menu button on the left upper corner, and select "Application -> Market -> ADD

APPLICATION" to access the "Common use cases" interface. Then, the user can click "Other -> Inbound webhook". Please refer to the screenshots





Bitrix24 Interfaces

3. On the "Inbound webhook" interface, the user can scroll down to the "Assign permissions" section, select "CRM", "Users", and "Lists", then click the

"Save" button.

4. Under the title "Webhook to call REST API", the user can copy the Webhook URL and click the "Close" button.

Webhook to call REST API	
https://b24-ccga45.bitrix24.com/rest/1/fqaxnhyur7ebkbew/	
GENERATE NEW	
Request builder	
Method	
profile + select	method description download example
Parameters	
+ add parameter	
URL	
https://b24-ccga45.bitrix24.com/rest/1/fqaxnhyur7ebkbew/profile.jso	n
EXECUTE	
Assign permissions	
Users (user) = CRM (crm) = Lists (lists) = + select	
	SAVE CLOSE

Obtain Webhook URL

## Login to Bitrix24 CRM System through Wave App

1. The user can install and open the Bitrix24 add-in in the "App Store" in the Wave application and fill in the Webhook URL address to log in to the Bitrix24 CRM system.

👛 Bitrix24	_		×
Q Webbeek			
C Webnook			
Log In			
✓ Remember me			
Wave CRM User Guide			
		Siloa	rCRM

Log in to Bitrix24 CRM System

2. The user can fill in the copied Webhook URL address to the blank in the screenshot above the log in to the Bitrix24 CRM system.

mm	ye@grandstream.cn	
is lo	ogged in.	Log Out
Synchronize wa system	ve call records to CRM	
Contact card in	formation	
information 1	Name	~
information 2	Phone	V
information 3	None	~
information 4	None	~
information 5	None	~

Logged in to Bitrix24 CRM System Successfully

#### Note

Only the Bitrix24 CRM users who have already purchased the corresponding services can obtain the Webhook URL address. If the Bitrix24 CRM plan has expired, the user cannot obtain the Webhook URL address, so the user cannot log in to the Bitrix24 CRM system through the Wave application.

### Freshdesk CRM System

#### **Obtain API KEY and Domain of Freshdesk CRM Account**

The user can sign up Freshdesk CRM account at https://freshdesk.com/signup. If the user has an account for the Freshdesk CRM system, the user can log
in to the system directly. If the user does not have an account for the Freshdesk CRM system, the user needs to sign up for a Freshdesk CRM account.
The user can fill in the required personal information and click the "Sign up" button, the Freshdesk CRM system will send a confirmation email to the
registered email address. Then, the user can click the "Activate Account" button to activate the account.

Freshworks	
Freshdesk	
Try Freshdesk for free	Sign up for a 21 day free trial
No credit card required. No strings attached.	S First name Last name
<ul> <li>75% reduction in licket resolution time</li> <li>&lt; 3 month payback period</li> <li>54 hours per agent per year saved with automations</li> </ul>	l⊜ Work email
	Company
Trusted by 50,000+ businesses	D Phone no.
aramex 🧿 orderin Anuacestone	Your data will be located in United States Change
DECITILION Pearson Cirutomon,	BION UP FOR FREE By cloking "SIGN UP FOR FREE", I accept the Freehworks Terms of Bervice and Physics Notice.

Sign up Freshdesk Account

2. Obtain API KEY. After logging in Freshdesk CRM system, the user can click the avatar on the right upper corner and access the Profile Settings. The user can view the generated API KEY on the right side of the interface. Please refer to the screenshots below:

n fouts
n Suits
tal
tal
tal
-
Demo 🗈 Ne

Obtain API Key

3. Obtain domain. The user can click the icon on the left bottom corner to view the personal information. The user can copy the "xxxx" contents on the link "xxxx.freshdesk.com" as the domain. Please refer to the screenshots below, the domain is "grandstream".



Freshdesk Dashboard



Obtain Domain

### Login Freshdesk CRM System through Wave App

1. The user can install and open the Freshdesk add-in in the "App Store" in the Wave application and fill in the domain and API KEY to log in to the Freshdesk CRM system.



Login Freshdesk CRM System

2. The user can fill in the obtained domain and API KEY to the blanks in the screenshot above to log in to the Freshdesk CRM system.

reshdesk		- 0
✓ 试测 is lo	则 ogged in.	Log Out
Synchronize wa system	ve call records to CRM	
Contact card in	formation	
information 1	Name	×
information 2	Phone	~
information 3	None	~
information 4	None	~
information 5	None	~



Logged in to Freshdesk CRM System Successfully

## Hubspot CRM System

#### Log into Hubspot CRM System through Wave App

1. The user can install and open the HubSpot add-in in the "App Store" in the Wave application and fill in the Email address and Password to log in to the

HubSpot CRM system. Please refer to the screenshot below:

🏷 HubSpot Login	_	×
HubSpot		
Don't have an account? Sign up		
Email address		
Password		
Show Password		
Forgot my password		
Remember me		
Log in		
G Sign in with Google		
Log in with SSO		
©2022 HubSpot, Inc. All Rights Reserved.		
Privacy Policy 🖉		

Log into Hubspot CRM System

2. The user can fill in the email address and password to the blanks in the screenshot above to log in to Hubspot CRM System.

	Hubspot	
chjli is lo	@grandstream.cn gged in.	Log Out
Synchronize wa CRM system	ve call records to	
Contact card in	formation	
information 1	Name	$\sim$
information 2	Phone	$\sim$
information 3	Email	V
	Go to HubSpot	

Logged into Hubspot CRM System Successfully

## Salesforce CRM System

## Login Salesforce CRM System through Wave App

1. The user can click to install and open Salesforce CRM Add-in in the "App Store" in the Wave application. Once the add-in has been installed, the user can open the add-in and choose the server address from the drop-down menu, as shown in the screenshot below.



Salesforce Server Address

2. Click "Log in" then enter the username and password created on Salesforce website.

🗢 Login   Salesforce			_	×
	sale	sforce		
Username				
Password				
	Lo	og In		
Remember	me			
Forgot Your Pass	word?	Use Custom I	Domain	
Not a c	customer?	Try for Free		
© 2023 Sale	esforce, Inc. /	All rights reserved.   Priva	асу	

Salesforce Log-in Portal

Note

Only the Salesforce CRM users who have already purchased the corresponding services can use the Wave application to access the Salesforce CRM system. If the Salesforce CRM plan has expired, and the user cannot access the Salesforce CRM system through the Wave application, please contact the Salesforce CRM system administrator to obtain the plan.

### Sugar CRM System

#### **Service Setup**

#### • Set up Sugar CRM System

- 1. Users need to set up the Sugar CRM system locally by using the related application. Users need to download the Sugar CRM system installation package "SugarCRM.exe", install the application on the PC, and set the admin username, password, and Web server installation address/port during the installation process.
- 2. After installing the application, users can run the Sugar CRM application, and log in to the Sugar CRM system with the admin username and password.

#### • Create New User

1. When the administrator has logged in to the Sugar CRM system, the administrator can click the "Admin" option on the right upper corner of the main interface to access the system management interface. The administrator can click on the "User Management" option to view all users' information in the current system, and it allows the administrator to make operations to those accounts.

SUGARCEM.				Welcome, yellog Cul	Ensirves Admin Support	Help About Superlite Typesis	
						Stemap - P	54
ales Marketing Support Activities	Collaboration All						
ana Accounts Contacts Opportunities Leo	ads Employees						
tt Vieweed: 🙀 fei pe 📋 🖓 🗄 cheisen ye 🙀	i pe xy 🛛 🙀 ye leaf 💋 normal						
itorea: 📓 Create Employee 🖀 View Employe	NO.						
ar Cauld not canned to the Sugar Server Please a To send record asognment estituations, an SM S & Search	check your Proxy. Settings value in the <u>System Settings</u> as TP server must be configured in <u>Crisel Settings</u> .	dmin paneli. Last attempted cannection @ 03/21/2022.20	22				H S
n I Inden							9
		Sugar CRM Sy	ystem Main Interfo	асе			
SUGARCRM.				Welcome, <u>ye xe [ Los Out</u> ]	Emelorees Admin Suecost Hel	e Abost Sucarity/Criticis 118	AFRENE 🖓 MAR
						Stenop P	Sear
Sales Marketing Support Activities	Collaboration All						
ane Accounts Contacts Opportunities Lea	eds Administration						
t Vieweed: 👔 feipe 📺 🖓 Echelses yn 👔	ye xy 🙀 ye leaf 🔔 narmai						
er: Ceudenot connect to the Sugar Server Please a To send record assignment extilications, an SM ministration	check your Provy Settings value in the <u>Stylen Settings</u> at IP server must be configured in <u>Ecoal Settings</u>	ten panel. Last altempted connection @ 1921/2922.28	23				
r. Could not campa (I to the Sugar Sarver, Please to same receipt sugarment satification, an SV ministration	check your Phony Sellings value in the <u>Optimu Selling</u> and TP server must be configured in <u>Erroral Sectors</u>	ten panel. Last atlangted connection @ 03/21/2822.28	22				
r. Guid rot comed to the Sugar Sarver. Please to search cord assignment estilization, an SV ministration	check year Proce, Bellings value in the <u>Rotent Setting</u> en IP server must be configured in <u>Erroral Setting</u>	ten panel. Last attempted connection @ 63/21/2822.28	22				
r: Could not campa (I to the Digar Sarver, Piese to some recein suggement stiffication, an Su ministration	check year Proce, Selfrag value in the <u>Potent Selfrag</u> en IP enven mattike configured in <u>Erosa Sentras</u>	ten panel. Last attempted connection @ 03/21/2822.28	22				
c. Could not canned to the Digar Server. Please to some receive suggement satification, an SU minietration           entitietration           entitietration	check your Procey Selfange value in the <u>Porters</u> Selfang et IP environment be configured in <u>Errori Selfang</u>	ten panel Last attempted connection @ 03/21/2822.28					
r: Could not campad to the Digar Sarver, Please to same receipt a suggement satification, an SV ministration	sheck your Procy Selfings value in the Spytem Selfings of TP server matche configured in Erroral Sections	inn panel. Last attempted connection @ 03/21/2822.28	22	Marag	pe rate membership and properties		
c) Could not carried to the Sugar Sarver, Please to send recert assignment satisfactions, an SW initiativation           Initiativation           Initiativation           Initiativation           Initiativation	check your Procy Selfings value in the Spatian Selfings of TP server matche configured in Erosal Sections Manage user accounts and personnels Manage password requirements and personnels	tem panel. Last attempted connection @ 83/21/2822.28	22	Maraj	pe ratio membership and properties		
er Could not campa (1 to the Sugar Sarver, Piese to some receipt sugarweit satification, an SV ministration entriestration ers etc. eot, activate and deachede users in Sugar Sugar Management • Paccaneet Management	And/year Proof, Selfings value in the <u>Ontern Selfing</u> en IP early must be configured in <u>Erroral Selfing</u> . Manage user accounts and passworth Manage password regularmets and e	inn panel. Last altempted connection @ 03/21/2822.28	22	Manag	pe rale membership and properties		
ere could not campat to the Sugar Sarver. Please to be not react to the Sugar Sarver Antification, an Su initiatization and sugar	check your Proce, Selfings value in the <u>Potent Selfing</u> of IP very en mattile configured in <u>Erroral Selfing</u> Manage user accounts and pasteriorist Manage pastword requirements and e	ten panel. Last altempted connection @ 83/21/2822.28 ) spination ch FAQs (Frequently Asked Questione), download the la	23	Moreg	pe rate membership and properties		
Could not comed to the Sugar Sarver. Please in Sarver Incode ministration	shed year Proof, Selfings value in the <u>Optimul Selfing</u> with IP erver must be configured in <u>Erroric Selfing</u> with IP erver must be configured in <u>Erroric Selfing</u> with IP erver must be configured in <u>Erroric Selfing</u> with Manage user accounts and approved in Manage password requirements and error to can access the Segar CRM forums and Segar Walk, sear Access the Segar CRM forums and Segar Walk, sear	tern panel. Last attempted connection @ 83/21/2822.28 spiration ch FAQs (Frequently Asked Questions), download the la	23	More and request new features and news	pe rate membership and properties		
er: Coadrand comed to the Sugar Server. Prese in Sorend receive assignment sofficiation, an SV interinityStation ereinitySta	check year Proce, Selfings value in the Optime Selfings of IP verse must be configured in Ecoal Selfings Manage user accounts and pastwords Manage password requirements and e su can access the Sugar-CRM forums and Sugar Wall, sea Access technical support and more View Sugar documentation for admiss	tern panel. Last attempted connection @ 83/21/2822.28 spinalos cch FACs (Frequently Asted Questions), download the lo bators and end-users	23	and request new features and rece.	pe rate membership and properties for the latest Sugar version		
Count of comment is the Sugar Carver. Please in Source incode ministration	check year Proce, Selfings value in the Optime Selfings of IP very ensuit the configured in Erosal Selfings IP very ensuit the configured in Erosal Selfings Manage user accounts and passewords Manage password requirements and e Norage password requirements and en-	ten panel. Last allempted connection @ 83/21/2822.28 b spiration rch FAQs (Frequently Asked Guestione), download the la haters and end-users	23	and request new features and research	pe rate membership and properties for the lakest Sugar version		
Could not canned to the Digar Sarver, Please     No some recent subgrand satification, an Su     Initiatization     Initiatitation     Initia	Andi year Procy Selfings value in the Spatem Selfings of Process must be configured in Erosal Sectors Manage user accounts and passenoids Manage password requirements and en- suid and access the Sugar CRM fourms and Sugar WAX, see Access technical support and more View Sugar documentation for elements or particulation of the sectors	teen panel. Last attempted connection @ 83/21/2822.28 paper of the second seco	23	and repetitive features and rece.	pe rate membership and properties for the lakest Sugar version		
er: Coadrand comect to the Sugar Darver. Preve in Source Access assignment softlication, an Su initialistration entities and experiment softlication, an Su initialistration entities and experiment assignment and experiment a User Management e Comment Management appr Connect provides DisparCPIM services where yo 3 Journ Suscept Partial 3 Ontities DisparceMate softlings according to the Ter- Network	Adda year Procy Sellings value in the Spatem Sellings of Preven mattice configured in Errad Sellings     Manage user accounts and passwords     Manage password requirements and e     Manage password requirements and e     Access the Sugar CRM forums and Sugar WM, see     Access technical support and more     Ware Sugar documentation for admises	teen panel. Last altempted connection @ 83/21/2822.28 s cpiration tch FAQ: (Frequently Asked Davations), download the la haters and end-users te of the default locate settings within their user settings	23	and request new features and record	pe rate membership and properties for the latest Sugar version		

		¥
Last -		100 C C C C C C C C C C C C C C C C C C

System Management Interface

2. On the "Actions" bar, the administrator can click on the "Create New User" button to access the user-creating interface. The administrator can fill in the

information of the new user, and click "Save" button to create a new user as the screenshot shows below:



Create New User Option

Home Accounts Contacts Opportunities	Londs Liters	a de la companya de l
Last Viewed: 👔 fei pe 🖂 (HE) cheises y	n 🙀 ye xy 🙀 ye leaf 🙆 normal	
Actions: 🙀 Create New User 🙀 Create	Group Liner 🔉 Vew Liners 🔲 Import Liners	
Error: Could not canned to the Sugar Server P Note: To send record assignment softwators,	wane check your Proug Settings value in the <u>System Settings</u> admin panel Last attem In SMIP Server must be configured in <u>Ernal Settings</u> . Reset Homepage	Connector @ (\$2100022023)  # Cauch Indicates required foot
User Profile User Name: *	admin	First Name:
Status: *	Adve w	Lost Name *
Uper Type:	Regular User User can access modules and recards based on roles.	
Employee Information		
Employee Status:	Adve v	Display Employee Record:
Tele		Work Phone:
Department		Matsile
Reports to	* ×	Other Phane
		Fax:
		Home Phone
IM Type:	*	INT Rupres
Address Steet		Address City:
Address diane.		Address Prister Code.
Address Country		
Lett por		
Email Settings		
Email Address. *	+ Primary Reply-to	
	• •	
Ensel Client: 10	Sugar Email Client 💌	
Email Provider		
ShITP Username:		

Create New User Interface

3. After creating the new user, the user can log in to the Sugar CRM system with the corresponding username and password.

## Login Sugar CRM System through Wave App

1. The user can click to install and open Sugar CRM Add-in in the "App Store" in the Wave application and enter the username, password, and CRM server address to log in to the Sugar CRM system.

	🔋 Sugar C	RM	—	×
1				
		E CRM Server Address		
		& Username		
2:		Password	> <sub>74</sub> 4	
		Remember me		
ž		submit		
		Wave CRM User Guide		
·C				
			_	

Log in Sugar CRM System

CRM Service Address	Configure CRM Service Address following the format "http://IP:Port/sugarcrm". In the URL, the "IP" is the IP address of the Sugar CRM system operating environment, and the "Port" is the Web server installation port that has been configured during the installation process.
Username	Please fill in this field with the Sugar CRM account username.
Password	Please fill in this field with the Sugar CRM account password.

Table 3: Log in Sugar CRM System

2. After filling in the login information and clicking on the "Log In" button, the user can log in to the Sugar CRM system as the screenshot shows below:

	Sugar CRM	
chj	li	Log out
Sync Wave call	history to CRM	
system Contact card in	nformation	
information 1	Name	$\sim$
information 2	Phone	$\sim$
information 3	Department	$\checkmark$
information 4	Fax	~
information 5	Description	~
	Go to Sugar CRM	

Logged in to Sugar CRM System Successfully

## Vtiger CRM System

#### **Service Setup**

- Set up Vtiger CRM System
- 1. Users need to set up the Vtiger CRM system locally by using the related application. Users need to download the Vtiger CRM system installation package "vtigerCRM620.exe" from the open-source download website below:

http://sourceforge.net/projects/vtigercrm/files/vtiger%20CRM%206.2.0/Core%20Product/vtigerCRM620.exe

2. Install the Vtiger CRM system on the local PC. Users need to set the Apache Web port, specify the MySQL user/password/port, and set the admin username, password, and email address during the installation process.

🔋 vtigerCRM620		D	×
Apache and MySQL Configuration Parameters			
	Important Note		
	Please choose the run. If you are not leave the default n would like to set fo	port numbers on which Apache and MySQL should sure what port numbers are available, please umbers as they are. Please pick a password you r the MySQL database administrator.	
	Enter the Apache w	eb server port number	
	Apache Port	8888	- 1
	Enter the MySQL da	tabase connection parameters	
	User Name	root	
	Password	admin	
	MySQL Port	33307	
vtlgerCRM620	Previous	Next Cance	

Install Vtiger CRM System – I

vtigerCRM620 vtigerCRM Configuration Parameters User and Currency Configuration Parameters		_	• ×
	CRM Administrator Us User Name Password Email	er Settings admin admin xyye@grandstream.cn	
	Select the default Cur Currency Name	rency for vtigerCRM USA, Dollars	
		🗌 Populate Databasi	e with Demo data
vtigerCRM620	Previous	Next	Cancel

Install Vtiger CRM System – II

3. After installing the application, users can run the Vtiger CRM application, and the user will be directed to the Vtiger CRM service page for confirmation purposes. Then, the user can log in to the Vtiger CRM system with the admin username and password.

#### • Add a User

1. When the administrator has logged in to the Vtiger CRM system, the administrator can click on the "Manage Users" option in the right upper corner of

the main interface to access the users' management interface. The administrator can click on the "Add User" option to access user creating interface to fill in the new user information. After clicking on the "Save" button, the new user will be created, then the new user can log in to the Vtiger CRM system with the username and password.



Manage Users

🕅 Calendar Organizations Cont	tacts Documents All -							2 O O A	âministrator
∲vtiger	All Records * Type larger	ed and press orbit							4
Settings	Users								
User & Access Control	Actions - + Add User	1	Active Users		*			110.0 6	8 3
Users		]							
Roles	A B C	D E F G H	1 ] K	L M N	O P Q	8 S T	U V	W X T	2
Profiles	Details		Role	Uteer Name	Status	Other Email	Admin	Office Phone	
Groups	1	Administrator	00	admin	Letter.		-		
Sharing Rules	-	xyyelligrandstream.on		12111	200		ler		
Login History		y <del>e</del> xyye@grandstream.cn	Sales Person	nype	Active		70		
* Studio									
<ul> <li>Templates</li> </ul>									
Other Settings									
<ul> <li>Integration</li> </ul>									
Extension Store									

Add a User

2. After logging in to the Vtiger CRM system with the username and password, the user needs to generate an access code for the new account, so that the user can access the Vtiger CRM system with the username and access code through the Wave application. After logging in to the Vtiger CRM system, the user can click on the "My Preferences" option on the right upper corner of the main interface and direct to the "User Advanced Options" section to obtain the access code. Please see the screenshots below:

Calendar Organizations Contacts Doc	uments All -			/ • <del>•</del>
ら vtiger	All Records  + Type keyword and press er	for Q Advanced		My Professioni
lome				Sign Out
		My Preference	es Option	
🖣 Calendar Organizations Contacts Doc	umento Al -			/ <b>0</b> sr
😔 v tiger	All Records * Type keyword and press er	fer Q Advanced		+
· More information				
· More more second	Trie		Fax	
	Department		Other Email	
	ATTice Phone		Secondary Email	
14	oble Phone		Reports To	
H	iome Phone		Secondary Phone	
	Signature		Documents	
Internal Ma	Composer No		Theme	
	Language US English		CRM Phone Extension	
Default	Record View Summary		Left Panel Hide	140
	Row Height medium			
w Liner Address				
Str	vet Address		Country	
	City		Postal Code	
	State			
User Photograph				
		Upload Photograph		
User Advanced Options				
	Access Key dV698VD0fm6z1uP			
Tag Cloud Display				
	Tag Cloud 🖌 Shown			

Obtain Access Code

#### Login Vtiger CRM System through Wave App

1. The user can click to install and open Vtiger CRM Add-in in the "App Store" in the Wave application and enter the username, access code, and CRM

server address to log in to the Vtiger CRM system.



Log in Vtiger CRM System

CRM Server Address	Configure CRM Service Address following the format "http://IP:Port". In the URL, the "IP" is the IP address of the Vtiger CRM system operating environment, and the "Port" is the Apache web port which has been configured during the installation process.
Username	Please fill in this field with the Vtiger CRM account username.
Access Code	Please fill in this field with the Vtiger CRM account access code.

Log in Vtiger CRM System

2. After filling in the login information and clicking on the "Log In" button, the user can log in to the Vtiger CRM system as the screenshot shows below:

• • •		Vtiger CRM	
	chj li has le	ogged in	Log out
	Sync Wave call h system	istory to CRM	
	Contact card inf	ormation	
i	information 1	Name	$\sim$
i	information 2	Phone	$\sim$
i	information 3	Department	$\sim$
i	nformation 4	Title	$\sim$
i	information 5	Description	$\sim$
		Go to Vtiger CRM	

Logged in to Vtiger CRM System Successfully

## Zendesk CRM System

### **Obtain API Secret of Zendesk CRM Account**

1. The user can sign up Zendesk CRM account by accessing https://www.zendesk.com/login If the user has an account for the Zendesk CRM system, the user can log in to the system directly. If the user does not have an account for the Zendesk CRM system, the user needs to sign up for a Zendesk CRM account. The user can fill in the personal information, and send the confirmation email to the configured email. Then, the user can click the "Verify your account" button to start using the Zendesk CRM system.

	Step 1 of 3	
Start your fre	ee Zendesk trial	
Work email		
	Next	

Sign Up Zendesk CRM Account

2. On the main page of the Zendesk CRM system, the user can click the icon in on the right upper corner, and click the "Sell" option to access the interface of the Zendesk CRM system. Please refer to the screenshot below:

+ Am			Q. Conversations 🗐 🖓 😘 🏭
Get started Dashboard		suite Professio	anal trial ends in 14 days on June 🖡 Support hat
Your account	3 min	Customer support channels	Guide
© Overview	~	See how Zendesk Suite works. It's ready to go with these essential elements that were made just for you.	•
Customer support channel	s		<ul> <li>Chat</li> </ul>
Add your team		Email Share this email with your customers, so they can reach you for	Talk
Ticketing system	3 min	help. Plus, you can create an unlimited number of custom emails or forward an existing address.	Lepiore
Agent productivity	8 min	Send a test ticket to support@leaf5067.zendesk.com	Sell Sales CIM
Messaging and live chat	12 min	Messaging and live chat	Admin Center
Help center	10 min	adding Web Widget to your website.	
Reporting and analytics	4 min	Add your Web Widget code snippet	
Apps and integrations	4 min	Voice	
Learn more		bo their needs.	

Zendesk Get Started Page

	Add ~		Trial expires in 14 days on 30/05/2022 Buy Zeedesk Sell	
÷	My Dashboard	My Dashboard Activity Feed		+ Widget
•	New Deals by Month. this year )	Revenue this month )	Taxin )	
s				
	· · · · · · · · · · · · · · · · · · ·			
•		\$0		



Zendesk Dashboard

2. Obtain API Secret.

- On the "Sell" module, the user can click the icon
   on the left menu to access the Settings interface. Then, the user can select Integrations -> OAuth to access the OAuth2 Settings interface.
- The user can click the "Add Access Token" button, fill in descriptions, and click the "Save" button to generate the API secret.

	Add ~	Trial expires in 14 days on 30/06/2822 Buy Zeederik Sell	Q,	۹ ۵	8	YX
*	Prospects and customers	Oduth2 Sattings				
	Deals	Construction of the second sec				
٢	Sales pipelines	ou de rearreira ancesa recesar				
	Products	Access Tokens Authorized apps Developer apps				
*	Custom Objects					
	Successful termination	Personal Access Tokens (PAT) are a convenient way of getting access to your own data in the Sell APL Here you can quickly add a new PAT and start using the API right away				
ş	Under Writghaters	Make sure to copy your new personal access token new. You won't be able to see it again!				×
	Notes	<ul> <li>INVESTIGATION CONTRACTORY CONTRACTORY CONTRACTORY CONTRACTORY CONTRACTORY</li> </ul>				
	Layouts					
-		Wave Details Edit 🗃				
<b>_</b>	Communication channels	+ Add Lange Tales				
	Email	- Pinica Packata Control				
	Voice and test					
al I	Chat					
	Internet from t					
•	Integrations					
_	Integrations Arms					
	Calandara					
	Sinole sinn on					
	OAuth					
	API					
	Party noises					
	Demosion					
	Samanyan					
	Automated actions					
	Scoring					
	G Get help					
-	Terms of service					
46	C Privacy policy					

#### Obtain Zendesk API Secret

#### Note

API Secret will only be displayed once it is generated, and it will not be displayed when it is closed. If the user forgets or loses the API Secret, the user can click "Add Access Token" to generate another API Secret.

#### Log Into Zendesk CRM System through Wave App

1. The user can install and open the Zendesk add-in in the "App Store" in the Wave application and fill in the Email address and Password to log in to the Zendesk CRM system. Please refer to the screenshot below:



Log into Zendesk CRM System

2. The user can log in Zendesk CRM system after filling in the API Secret.

zho is lo	u xin ogged in.	Log Out
Synchronize way system	ve call records to CRM	
Contact card in	formation	
information 1	Name	~
information 2	Phone	~
information 3	None	~
information 4	None	~
	Nege	

Logged Into Zendesk CRM System Successfully

## Zoho CRM System

The Zoho CRM system server is a cloud server, and it has been deployed in different regions of the world. The regional servers are as follows:

- US: https://accounts.zoho.com
- CN: https://accounts.zoho.com.cn
- EU: https://accounts.zoho.eu
- IN: https://accounts.zoho.in
- AU: https://accounts.zoho.com.au

The servers in different regions are independent, but the functional flows are the same.

This document introduces the Zoho CRM system based on the China regional server. The only difference between each regional server is the domain name address suffix.

The user can click to install and open Zoho CRM Add-in in the "App Store" in the Wave application and proceed to verify the identity.

1. The user needs to select the preferred CRM server address and click on the "Identity Authorization" button to access the identity verification interface.



Log in to Zoho CRM System



Table 5: Log in Zoho CRM System

2. The user will be directed to the identity authorization interface. If the user has not logged in to the Zoho CRM system yet, the user needs to log in to the system first, and then click on the "Accept" button, so that the Wave application will synchronize the user information in the Zoho CRM system.



Zoho CRM System Identity Authorization – I



Zoho CRM System Identity Authorization – II

3. When the identity authorization process is complete, the user can go back to the Wave application -> App Store -> Zoho CRM add-in, and click on the "Log In" button, then the Wave application will obtain the user's identity information in the Zoho CRM system for login purpose. If the user wants to switch servers during the login process, the user can click on the "Switch Server" button to authenticate identity again.

Please see the screenshots below:



Switch Server

afei has	logged in	Log out
Sync Wave call h	istory to CRM system	
Contact card in		
information 1	Name	~
information 2	Phone	~
information 3	Email	~
information 4	Company	~

Logged in Zoho CRM Successfully

#### Note

Only the Zoho CRM users who have already purchased the corresponding services can use the Wave application to access to the Zoho CRM system. If the Zoho CRM plan has expired, and the user cannot access to the Zoho CRM system through the Wave application, please contact the Zoho CRM system administrator to obtain the plan.

## Dynamics 365 CRM System

To integrate Dynamics 365 CRM with the Wave Desktop client, the user needs to provide the domain URL created on the Dynamics 365 CRM.

## Integrate Dynamics 365 CRM System through Wave

1. On the "application" page of the Wave Desktop application, the user can install and open Dynamics 365 add-in, and fill in the information below:

Dynamics 365	-	Х



Log Into Dynamics 365 CRM System

2. After filling in the information above, the user can log into the Dynamics 365 online account to use the Dynamics 365 CRM system service.