

Grandstream Networks, Inc.

Wave Desktop CRM Add-ins - User Guide



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.

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>

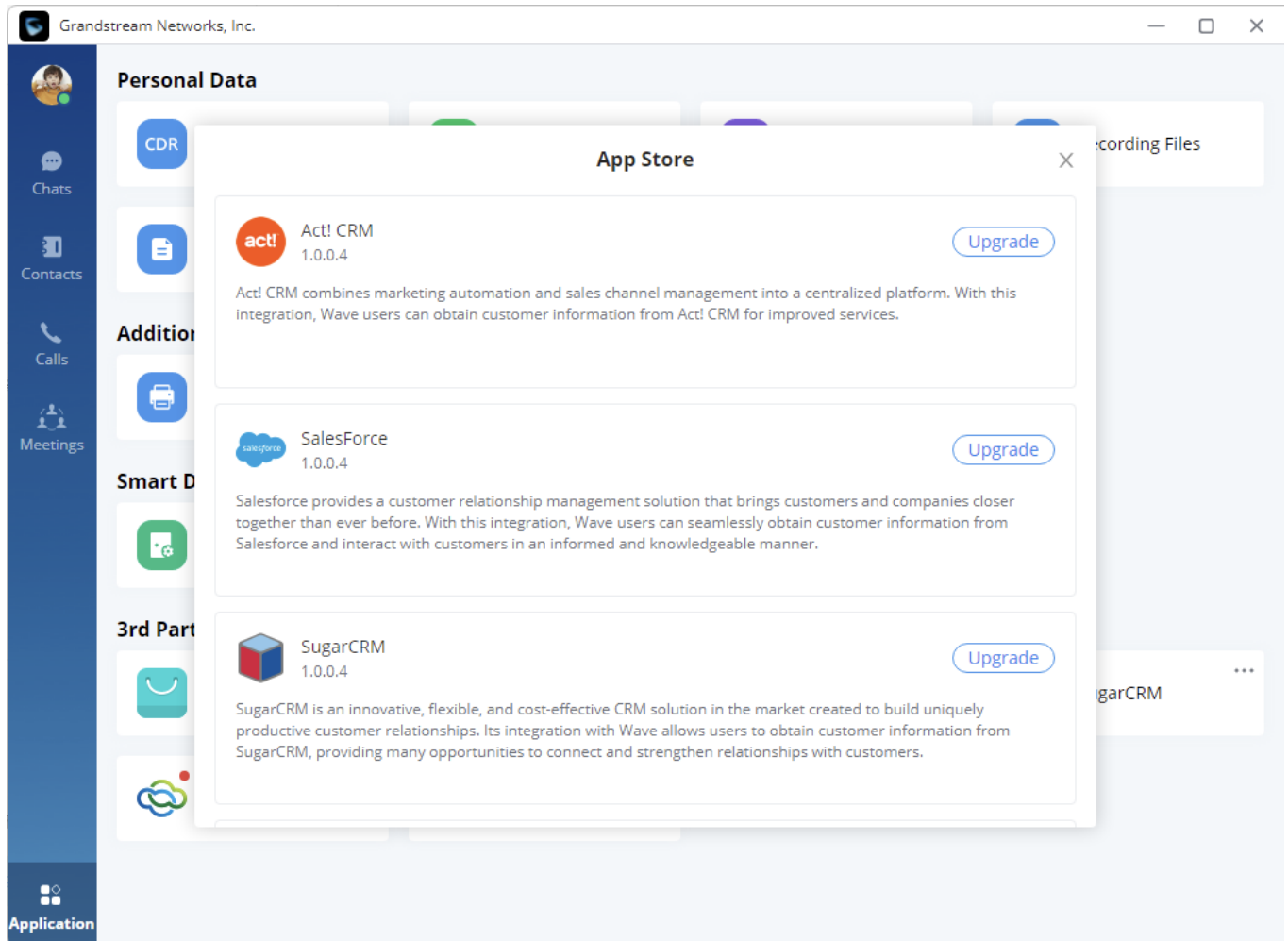
USING CRM ADD-IN ON WAVE APP

Prerequisites

1. You need to purchase a UCM RemoteConnect plan for your UCM device, and the purchased plan must contain Full Integrate API and 3rd 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:

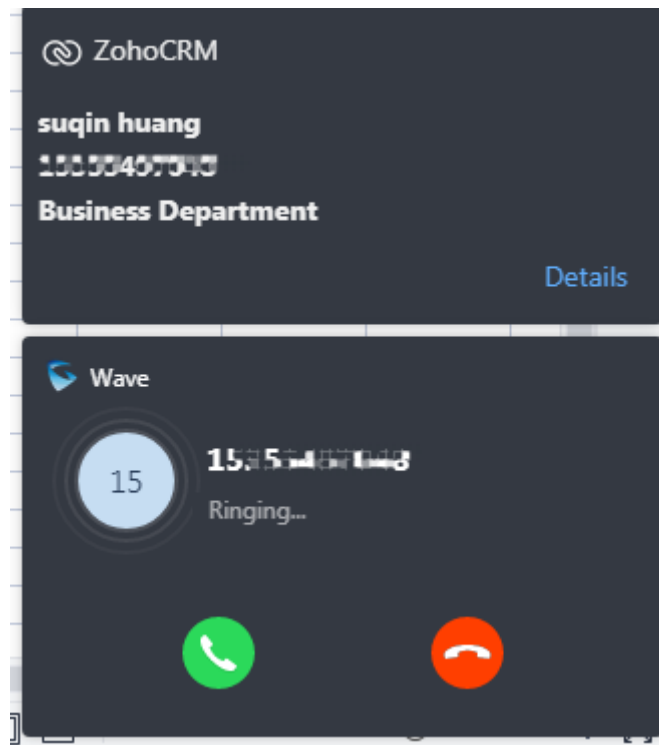


App Store

Display CRM Contact Information When Receiving Calls

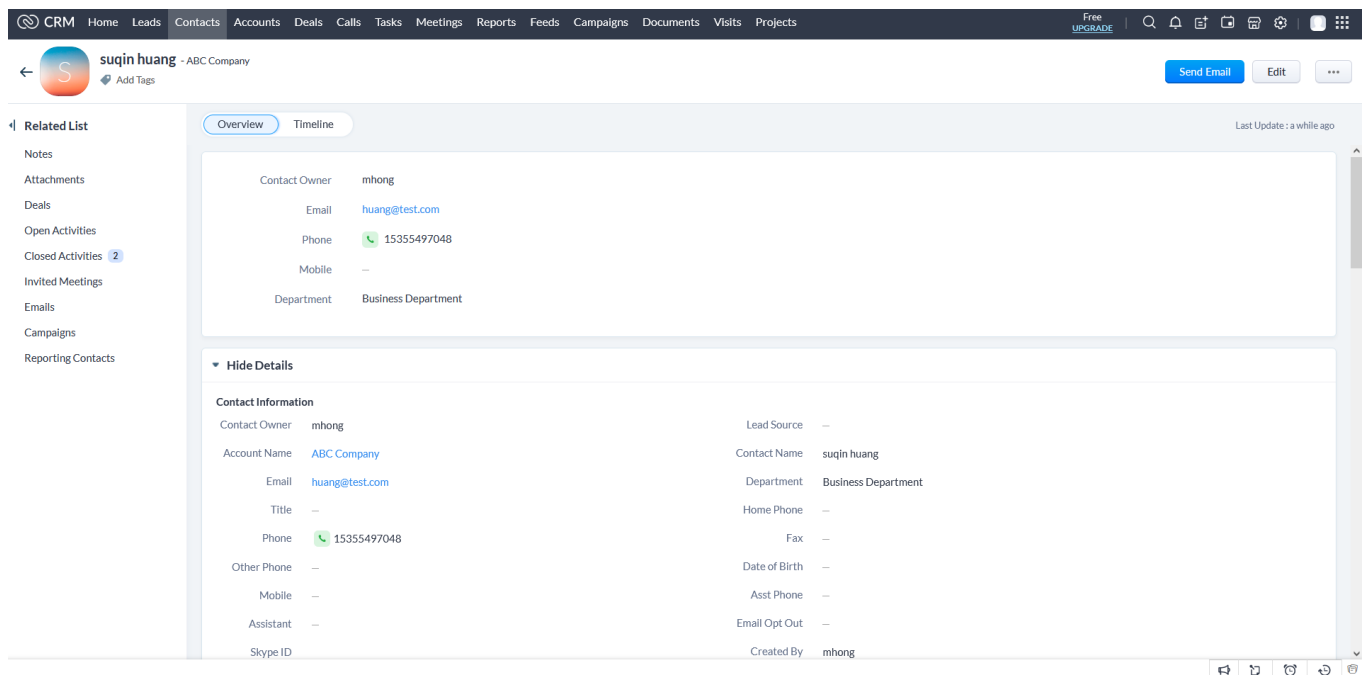
After logging into the CRM system, the user can invoke the CRM system when there is an incoming call to Wave application, or during an active call. Please refer to an example below for the Zoho CRM system (the operations in other CRM systems are the same):

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:



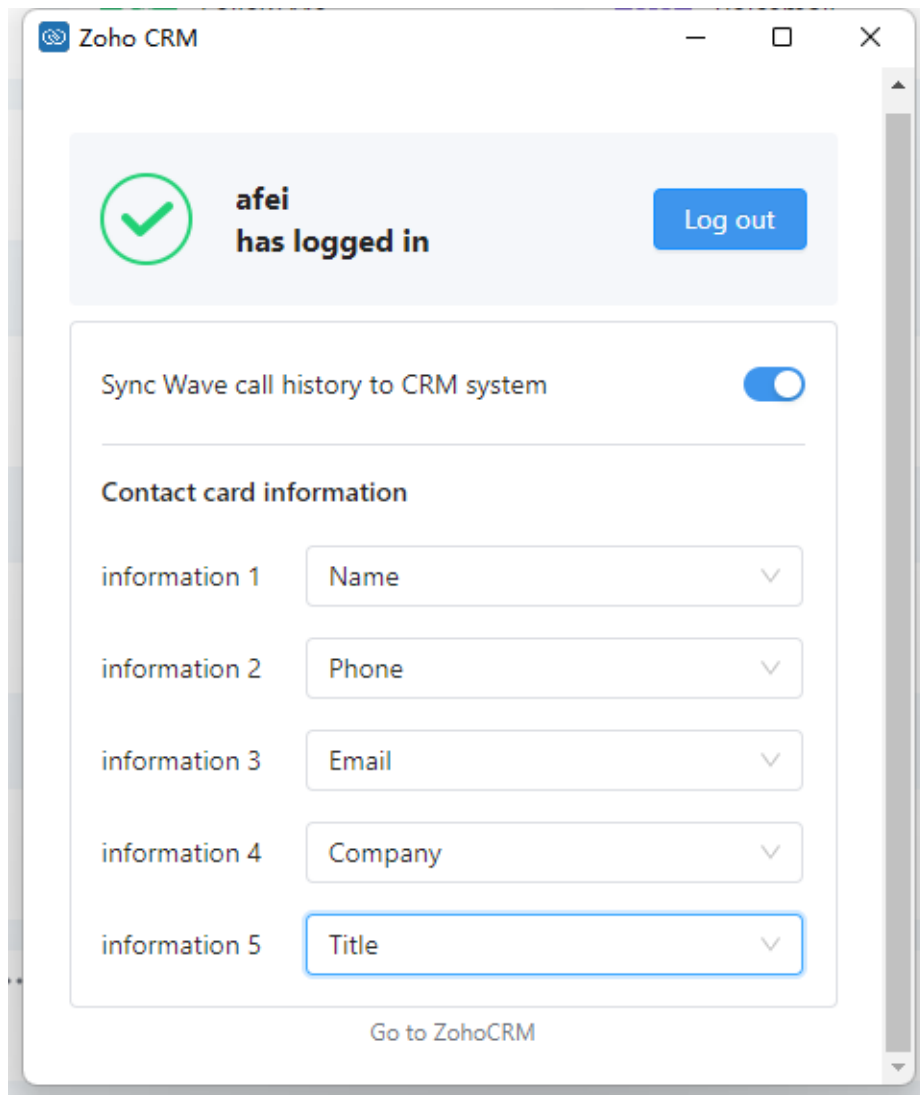
Zoho CRM Contact Card

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:

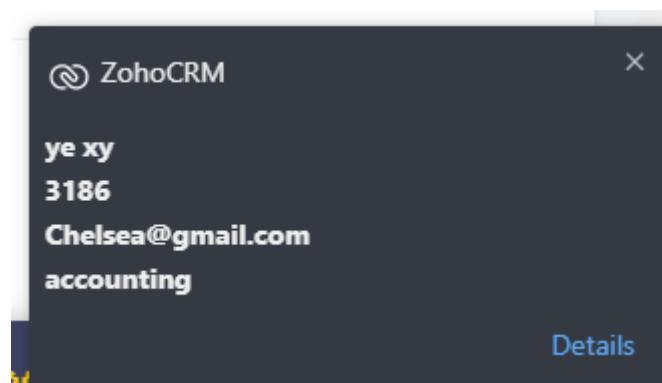


Zoho CRM Contact Detail

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:



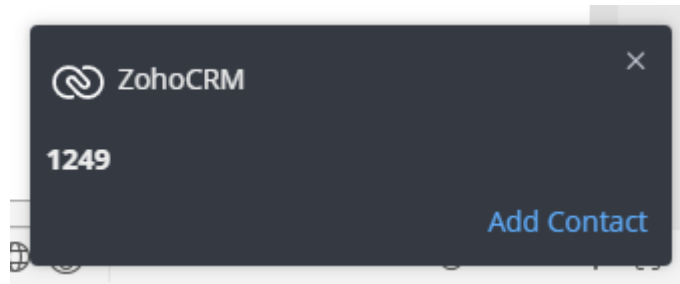
Customize Business Card Information



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:



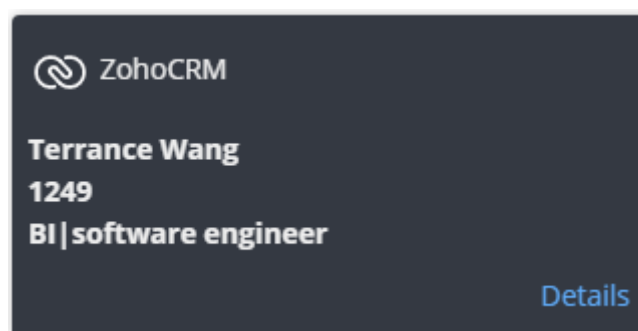
Add Contact to CRM System

 A screenshot of the Zoho CRM 'Create Contact' form. The top navigation bar includes 'CRM', 'Home', 'Leads', 'Contacts', 'Accounts', '商机', 'Calls', 'Tasks', '会议', 'Reports', '动态', 'Campaigns', '文档', and '访问'. The form title is 'Create Contact' with a link to 'Edit Page Layout'. Action buttons are 'Cancel', 'Save & New', and 'Save'. Below the title is a 'Contact 图片' section with a placeholder icon. The 'Contact Information' section contains two columns of fields:

- Left column: Contact Owner (afei), First Name (-None- | Terrance), Account Name, Email (Terrance@pwc.com), Title (software engineer), Phone (1249), Other Phone, and Mobile.
- Right column: Lead Source (-None-), Last Name (Wang), Department (BI), Home Phone ((0251)54874618), Fax, Date of Birth (1986-03-12), Asst Phone, and Email Opt Out (checkbox).

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.

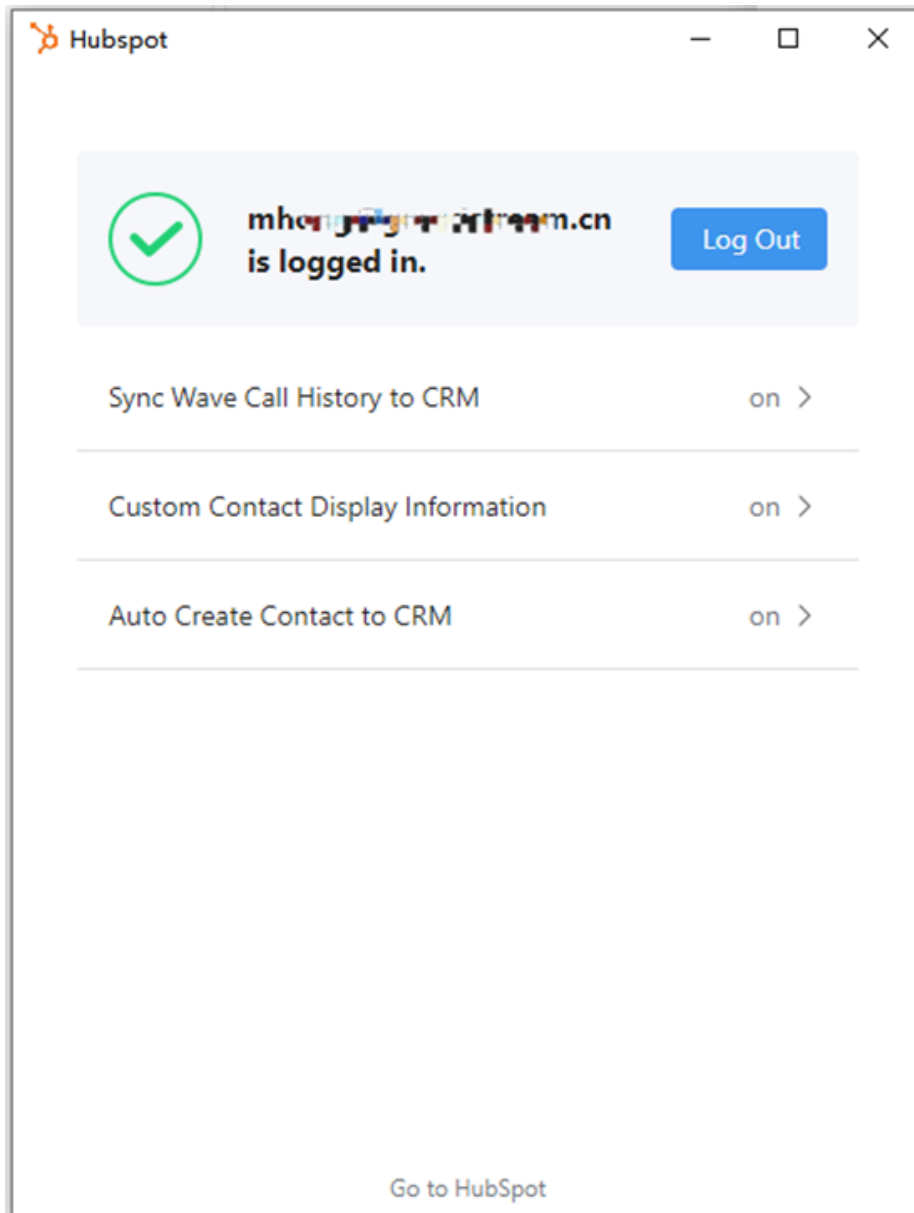


Zoho CRM Contact Card

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).

1. 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 CRM

Auto Create New Contact	If this option has been enabled, when a call from a new number is received, or when you make a call to a new number, the system will automatically create a contact entry in the CRM system following the settings below.
Create Contacts on Call Direction	All (Including outgoing calls and incoming calls. This is the default setting.) Outgoing calls (including unconnected calls). Incoming calls (including unconnected calls).
Create Contact or Lead	The type of the created contacts. Options: Potential Customer, Contact (This is the default setting.)
New Contact First Name	The first name of the newly created contact. The default setting is "Wave [The number of the other party]".
New Contact Last Name	The last name of the newly created contact. The default setting is "New".

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

Parameter Name (Case Sensitive)	Description
[Number]	The number of the other party (including the caller number of the incoming call and the callee number of the outgoing call)
[Agent]	The extension number of the agent (i.e., 1000)
[AgentFirstName]	The first name of the agent (i.e., John)

[AgentLastName]	The last name of the agent (i.e., Doe)
[AgentEmail]	The configured email of the agent (i.e., D.John@mycompany.com)

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.

Enable Synchronize Wave Call Records to CRM System Option

Synchronize Wave Call Records to CRM System	After this option is enabled, Wave call records will be automatically synchronized to the CRM system following the settings below.
Call Subject	The subject of the call record. The default setting is "Wave PhoneSystem Call".
Answered Inbound Call	The synchronized contents of incoming call.
Missed Call	The synchronized contents of missed calls.
Answered and Unanswered Outbound Call	The synchronized contents of answered and unanswered outbound calls.

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

Parameter Name (Case Sensitive)	Descriptions
[CallType]	The types of calls, including "Inbound", "Outbound", and "Missed".
[Number]	The number of the other party (Including the caller number of the incoming call and the callee number of the outgoing call)
[CallDirection]	"Inbound" or "Outbound"
[Name]	Matched CRM contact name
[EntityId]	Matched CRM contact ID
[EntityType]	Matched CRM contact type
[Agent]	The extension number of the agent (i.e. 1000)
[AgentFirstName]	The first name of the agent (i.e. John)
[AgentLastName]	The last name of the agent (i.e. Doe)
[AgentEmail]	The configured email of the agent (i.e. d.john@mycompany.com)
[Duration]	Call duration. Format: hh:mm:ss
[DateTime]	The start date and time (with time zone) of the call, the time format is standard time format.
[CallStartTimeLocal]	The start date and time (with time zone) of the call, the time format is the local format of the Wave client.
[CallStartTimeUTC]	The start date and time (with time zone) of the call, the time format is in UTC format.
[CallEstablishedTimeLocal]	The actual established start date and time (with time zone) of the call, the time format is the local format of the Wave client.
[CallEstablishedTimeUTC]	The actual established start date and time (with time zone) of the call, the time format is in UTC format.
[CallEndTimeLocal]	The end date and time (with time zone) of the call, the time format is the local format of the Wave client.
[CallEndTimeUTC]	The end date and time (with time zone) of the call, the time format is in UTC format.
[CallStartTimeUTCMillis]	The start date and time (with time zone) of the call, the time format is timestamp (unix time).
[CallEstablishedTimeUTCMillis]	The actual established start date and time (with time zone) of the call, the time format is timestamp (unix time).
[CallEndTimeUTCMillis]	The end date and time (with time zone) of the call, the time format is timestamp (unix time).

The screenshot shows the Zoho CRM interface with the 'Calls' tab selected. The table displays two call records for 'Terrance Wang's call'. The left sidebar contains filter options under 'Filter Calls by', including 'System Defined Filters' and 'Filter By Fields'. The top navigation bar includes links for Home, Leads, Contacts, Accounts, 商机 (Opportunities), Calls, Tasks, 会议 (Meetings), Reports, 动态 (Activities), Campaigns, 文档 (Documents), and 访问 (Access). The top right corner shows a 'Free UPGRADE' button and various utility icons.

Subject	Call Type	Call Start Time	Call Duration	Related To	Contact Name	Call Owner
Terrance Wang's call.	呼入	17/03/2022 02:01 PM	02:26		Terrance Wang	afei
Terrance Wang's call.	错过的	17/03/2022 02:00 PM	00:00		Terrance Wang	afei

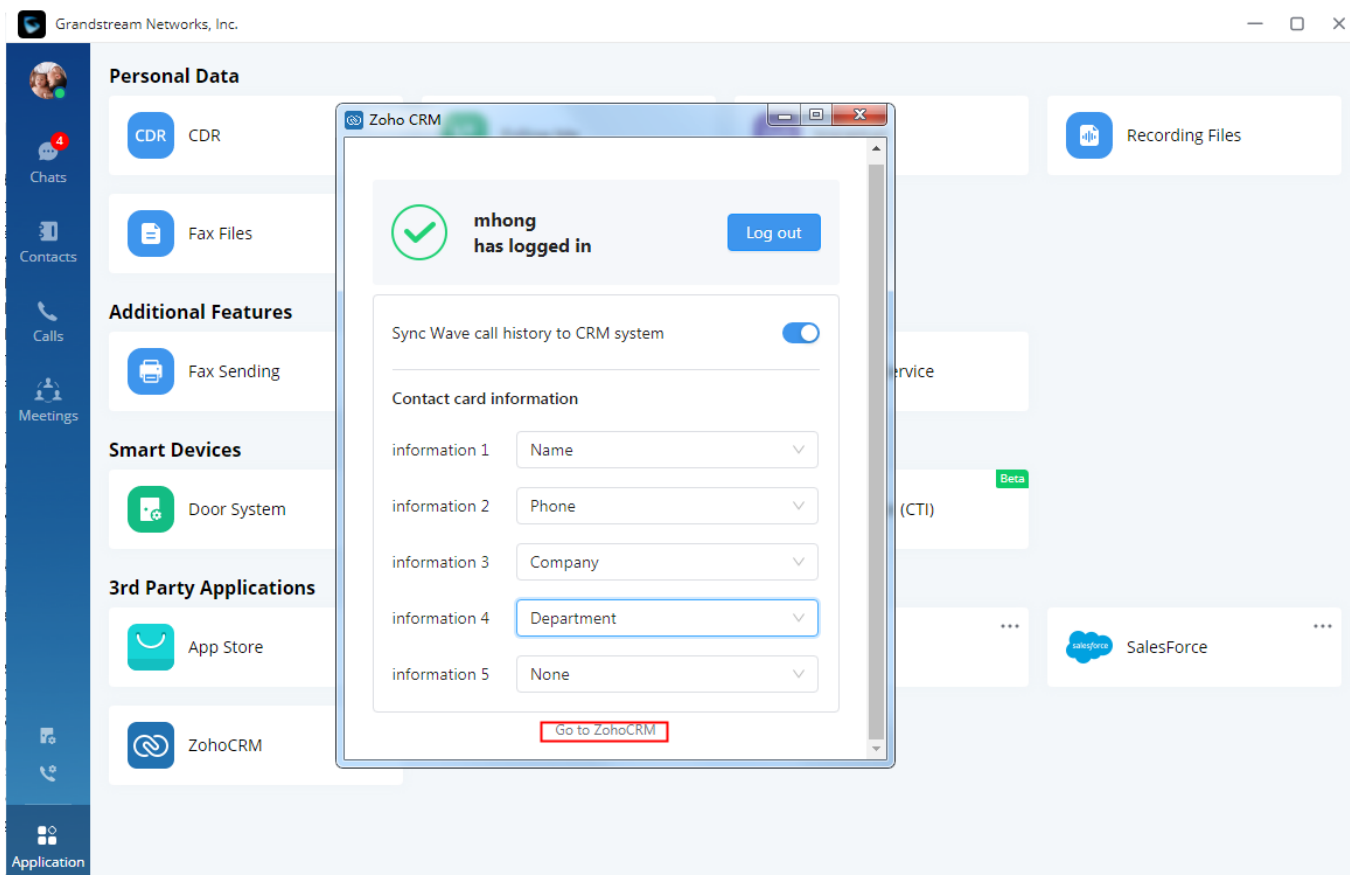
Zoho CRM Call Records

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

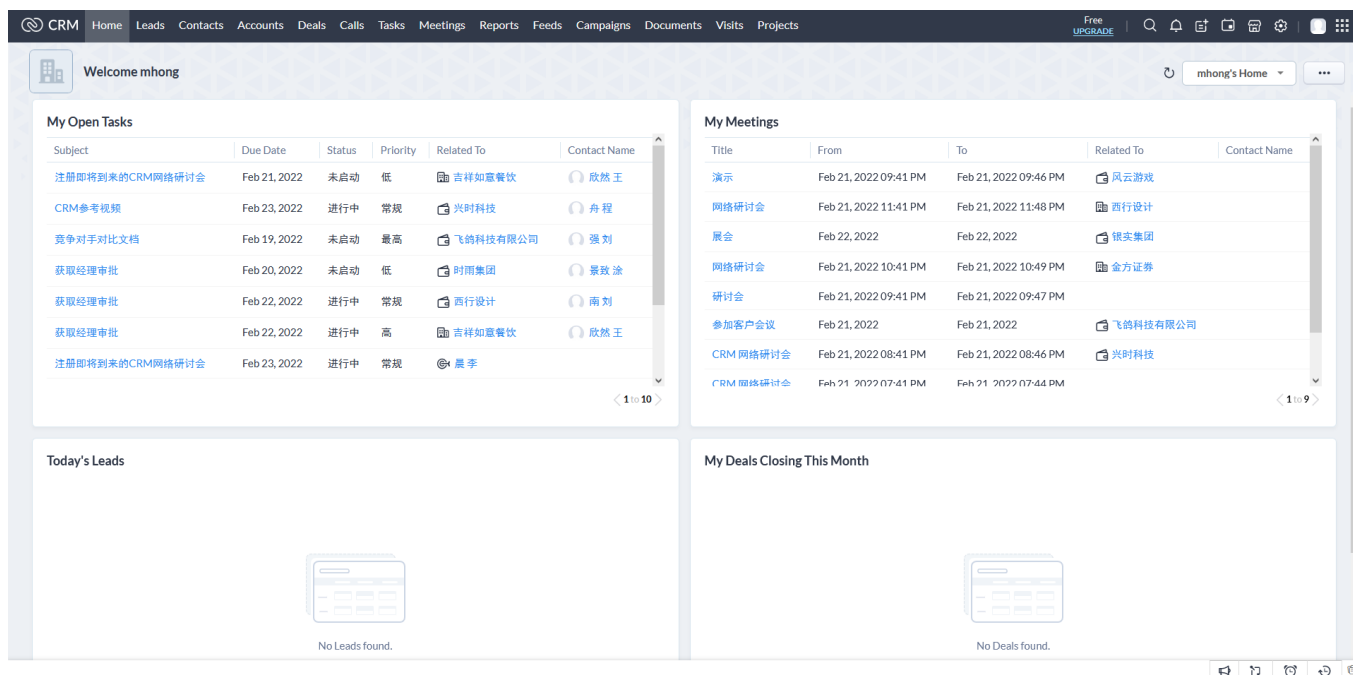
Please note that in order to use this feature, Wave Desktop client version should be 1.0.23.12 or later.

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:



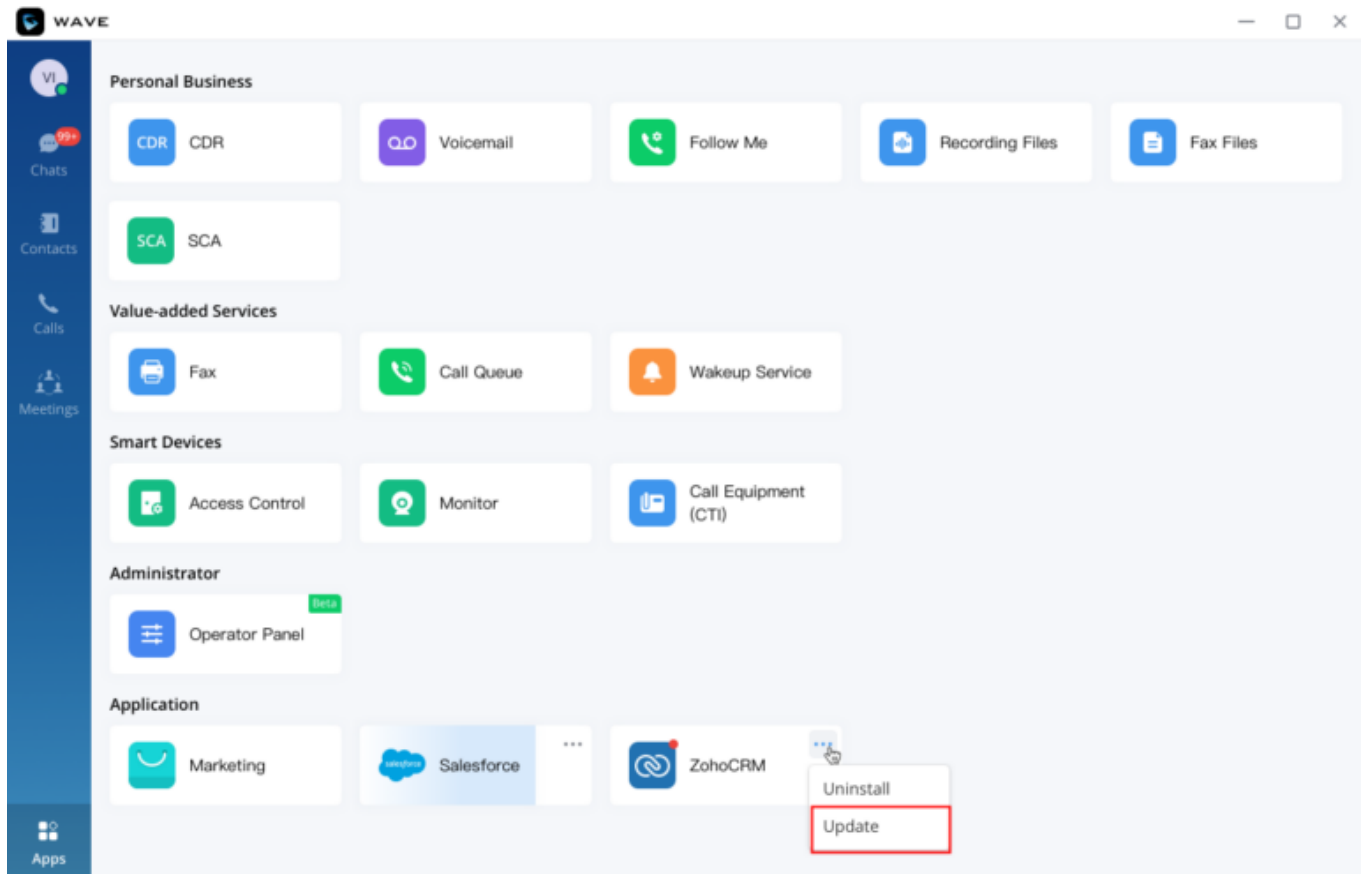
Zoho CRM Settings



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:

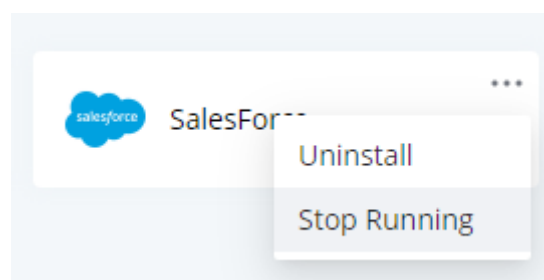


Update Application

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.

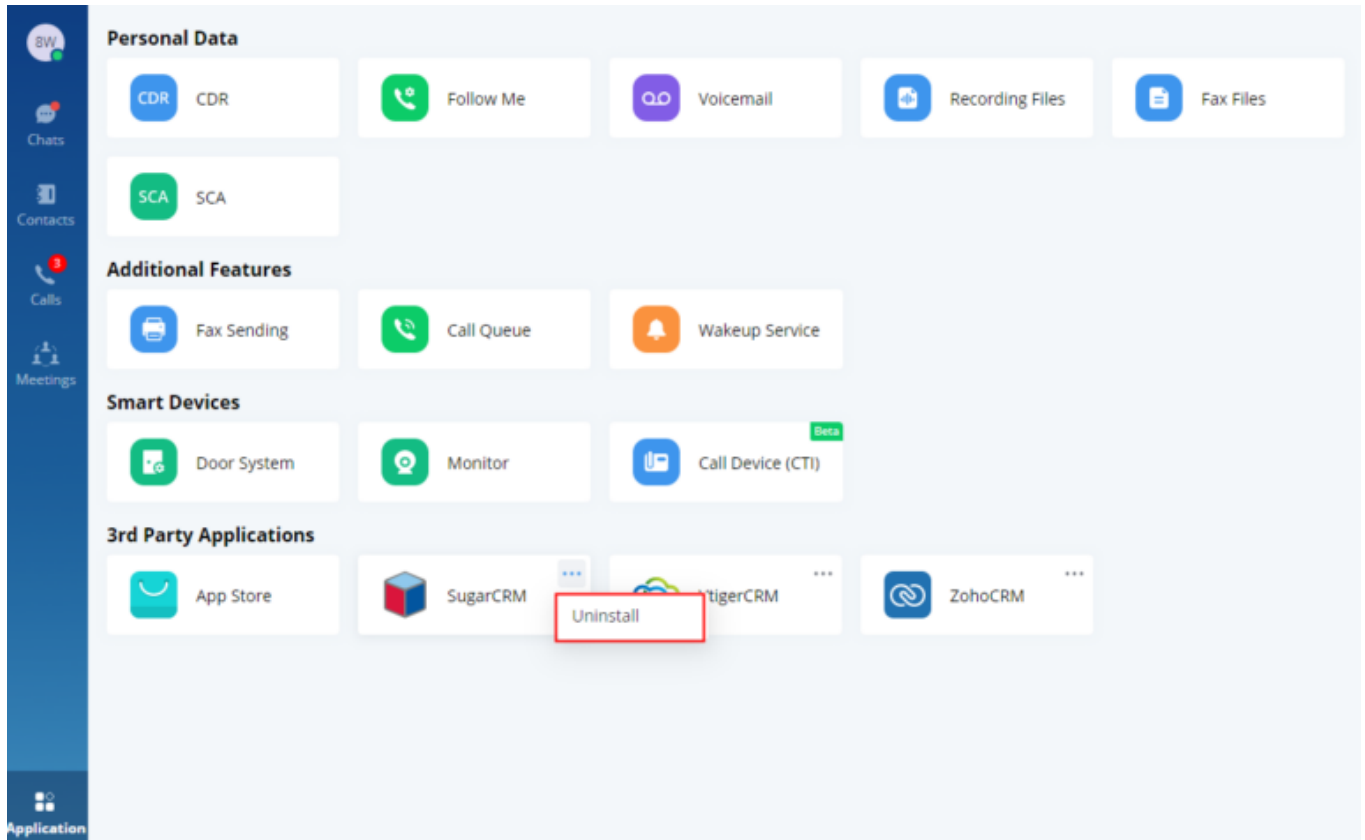


Stop Running Add in

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.

Log in ACT CRM System

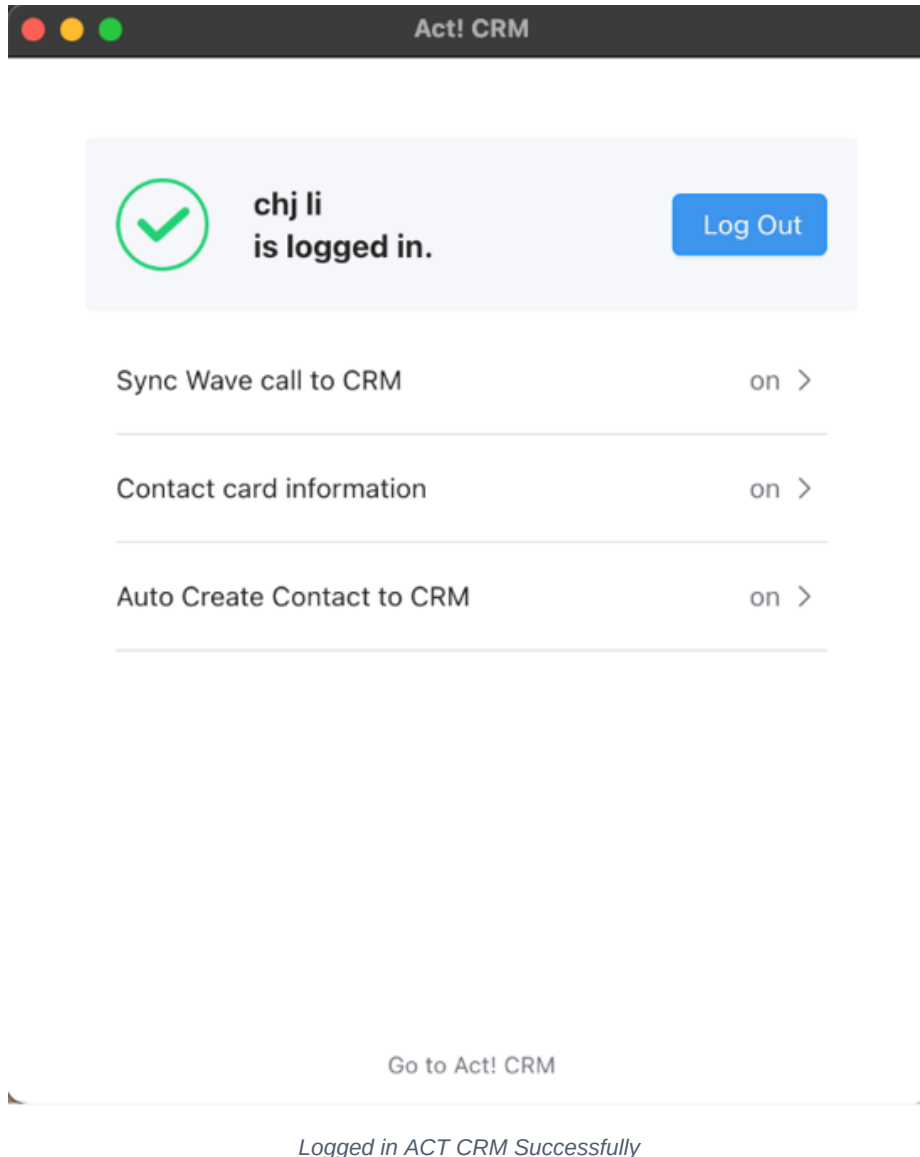
If you are using Act! Premium (On-premise), please refer to the filling rules below:

Username	The login username corresponding to your DataBase
Password	The login password corresponding to your DataBase
Database	The DataBase you are currently using
Server Address	Fill in your local server address. Please refer to the video below: https://training-act.com/act/act-lib-con/?courseId=setup&videoid=2

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

Username	The email you are using to log in in ACT! Premium Cloud
Password	Your login password
Database	Fill in the data base of Act! Premium Cloud. To get it, follow the steps below: Log in Act! Premium Cloud Click User Management -> Additional Settings
Server Address	Select the region where Act! Premium Cloud is located: US: https://apius.act.com/act.web.api? UK: https://apius.act.com/act.web.api AUS/NZ: https://apius.act.com/act.web.api EU/International English: https://apius.act.com/act.web.api

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

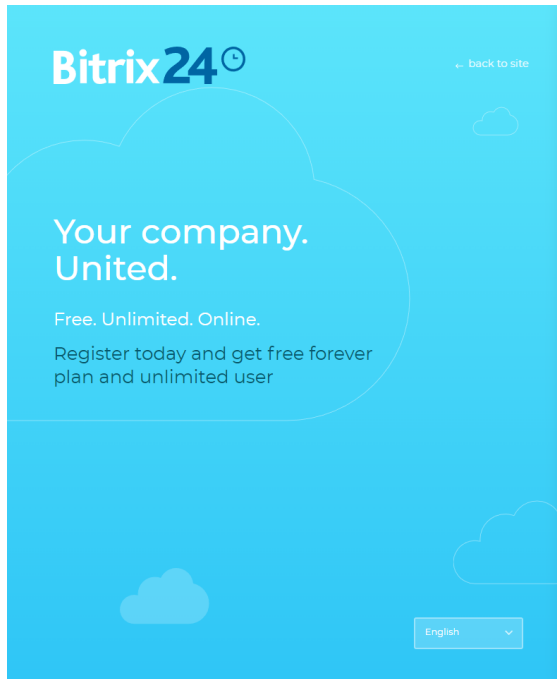


Only Act! CRM users who have already purchased the corresponding services can use the Wave application to access to the Act! CRM system. If the Act! CRM plan has expired, and the user cannot access to the Act! CRM system through the Wave application, please contact Act! CRM system administrator to obtain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



Bitrix24 Registration

Use your social account to register

[f](#)
[G](#)
[Apple](#)
[O](#)
[V](#)
[T](#)

or

Enter email

By registering you confirm that you accept the [Terms of Service](#) and the [Privacy Policy](#).

☒ I want to receive product updates info and special offers
☒ I want to receive training materials

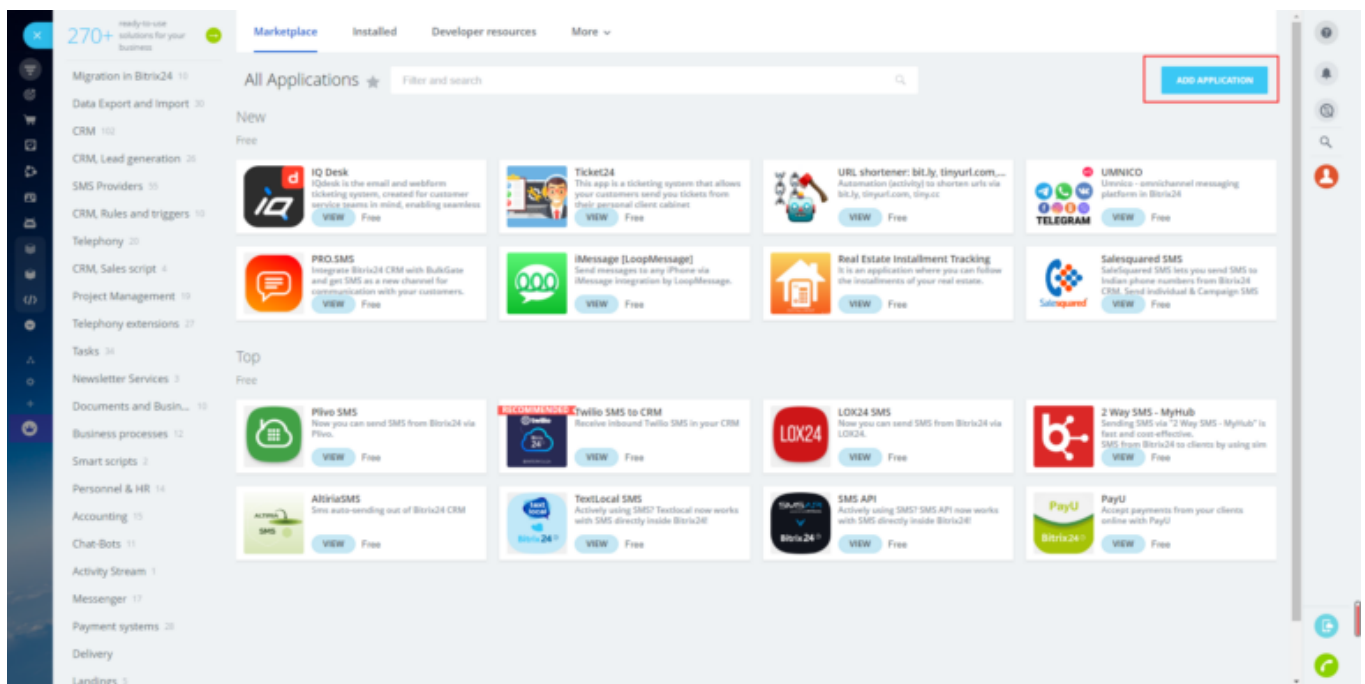
REGISTER FOR FREE

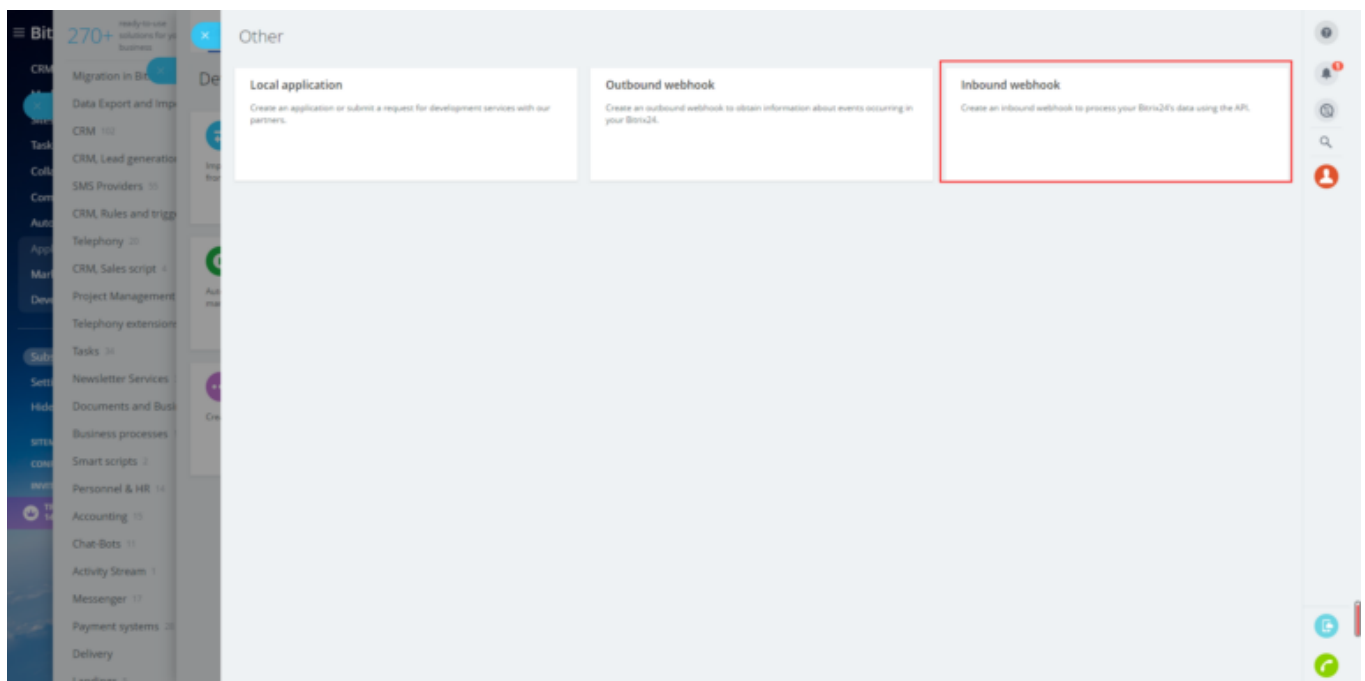
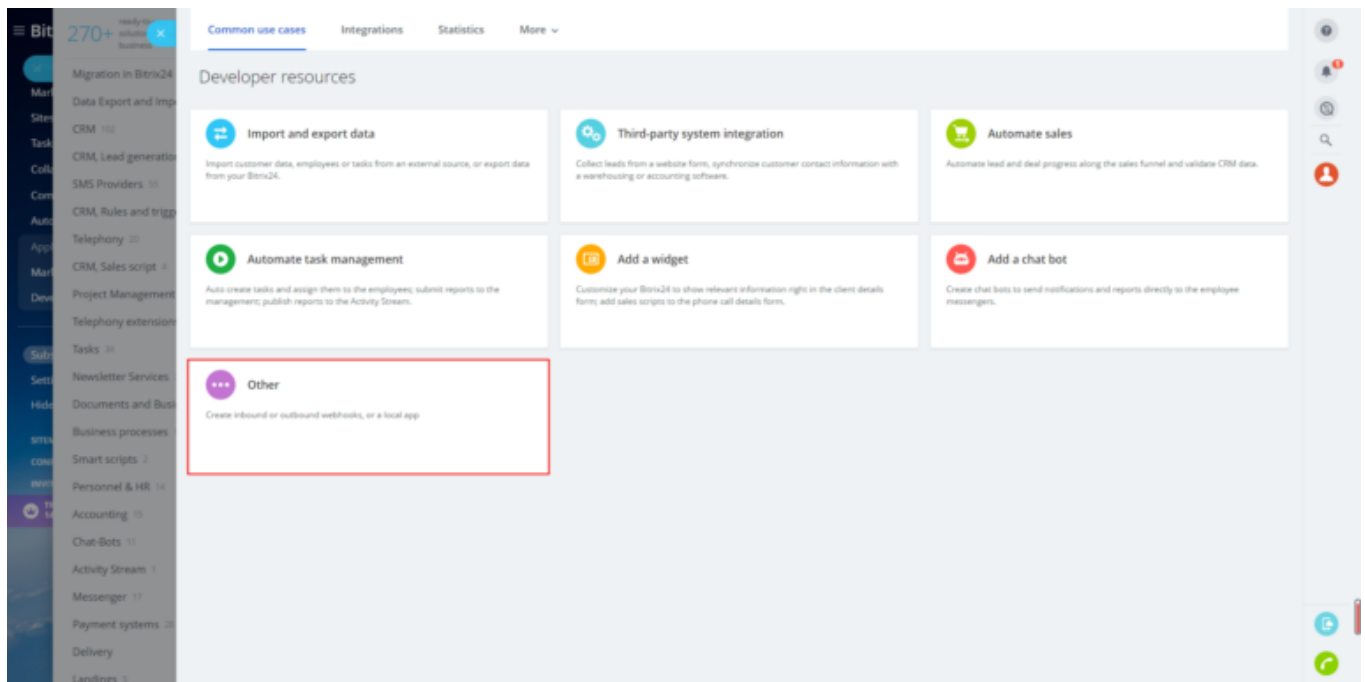
I HAVE A COUPON

This site is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply

Sign Up for Bitrix Account

- 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 below:





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.json>

[EXECUTE](#)

Assign permissions

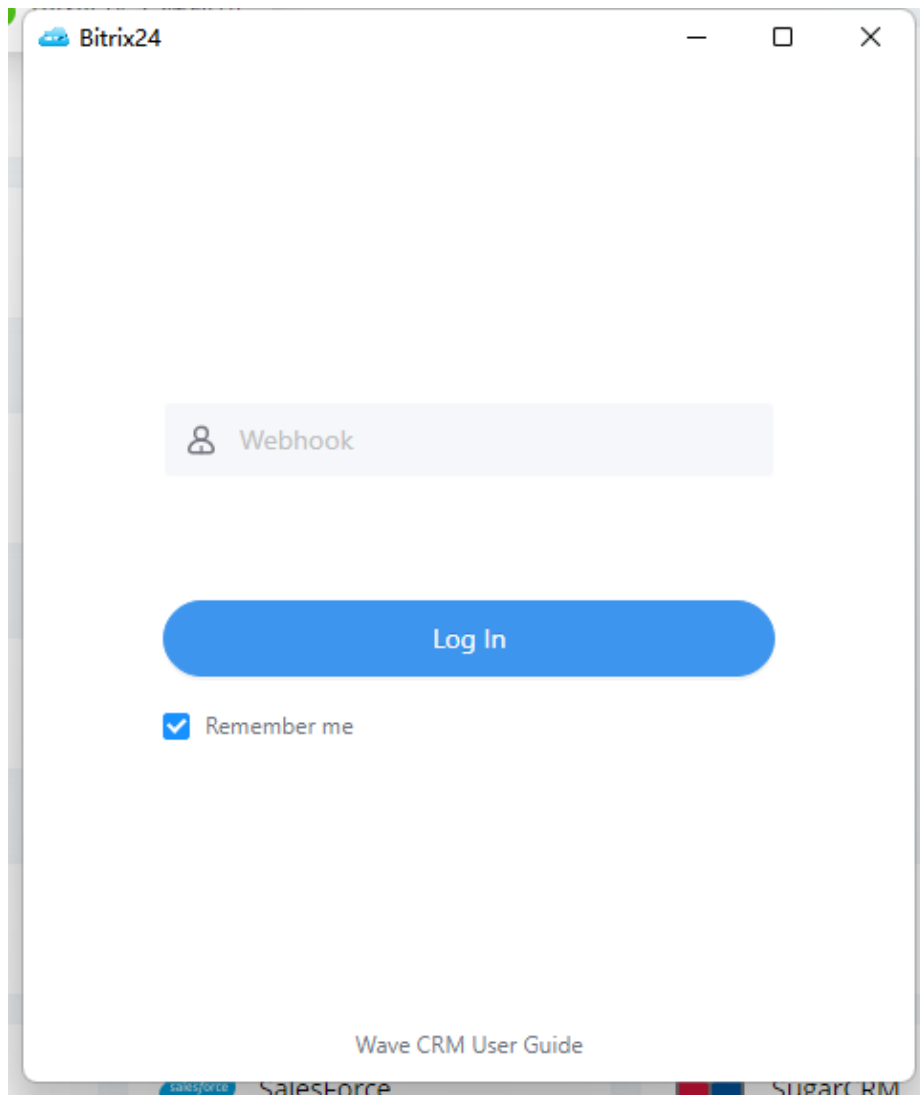
[Users \(user\)](#) [CRM \(crm\)](#) [Lists \(lists\)](#) [+ select](#)

[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.



Log in to Bitrix24 CRM System

Webhook	Webhook URL address generated in Inbound Webhook.
---------	---

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.



is logged in.

Log Out

Synchronize wave call records to CRM system ☒

Contact card information

information 1

Name

information 2

Phone

information 3

None

information 4

None

information 5

None

Go to Bitrix24

Logged in to Bitrix24 CRM System Successfully

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.

The user can set to auto-create new contact to create the contacts automatically when emitting or receiving a call on Wave Desktop.

Bitrix24

— □ ×

< Auto Create New Contact

Auto Create New Contact ☒

* Create Contacts on Call Direction

All ▾

* Contact Type

Deal ▾

* Title Name

Wave [Number]

Cancel Save

Auto Create New Contact

New contact types: Deal, Deal and Contact.

- Deal: When a stranger calls or makes an outgoing call, a deal will be automatically created. If the current number has a contact in the CRM system, the contact will be associated; if not, the deal will not be associated with a contact.
- Deal and Contact: When a stranger calls or makes an outgoing call, a deal will be automatically created, and a contact will be automatically created. If the call is from an existing contact, only the deal will be automatically created and the contact will be associated.

Capsule CRM System

Log into the Capsule CRM System through the Wave App

1. The user can install and open the Capsule add-in in the "App Store" in the Wave application.
2. Then, please click the "Log in" button on the following interface, and enter your system domain name:

Log in

☒ Remember me

[Wave CRM User Guide](#)

Capsule CRM Login



Wave

is asking for access to your Capsule account

Site address

companyabc

.capsulecrm.com

Continue

[Forgotten your site address?](#)

Capsule CRM Domain

3. Please click the "Allow" button on the screenshot below to authorize the Wave app to access your Capsule account:



Wave

is asking for access to your Capsule account

You are logged in as suqin huang

Allow

Don't Allow

About Wave

The Wave app allows your team to take advantage of an abundance of features to communicate and collaborate from anywhere, anytime on any device.

This app can

- Read information from your Capsule account
- Create, update and delete information from your Capsule account
- Update user preferences

Capsule CRM Permissions

4. After the authorization is successful, your Capsule CRM add-in can be successfully logged in.



stefin haring
has logged in

[Log out](#)

Sync Wave Call History to CRM

on >

Custom Contact Display Information

on >

Auto Create Contact to CRM

off >

[Go to Capsule CRM](#)

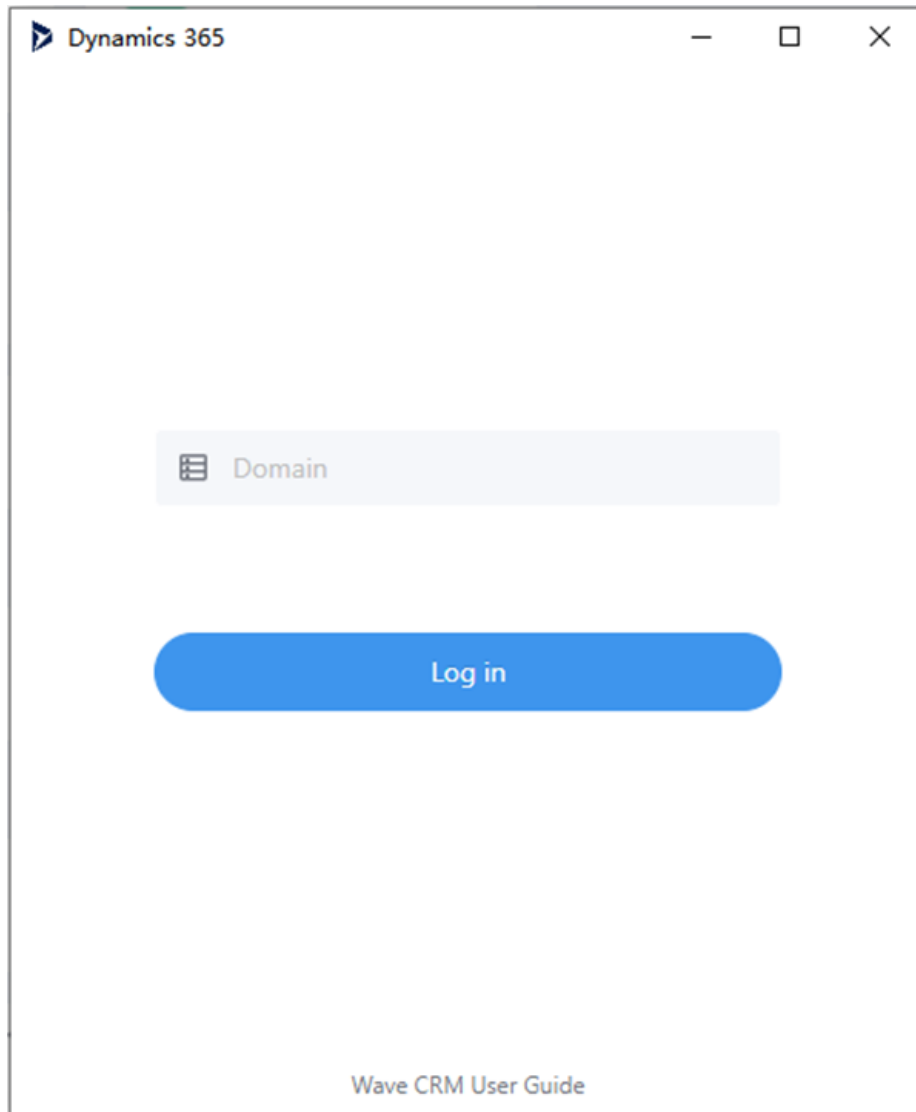
Capsule CRM Logged in

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:



Log Into Dynamics 365 CRM System

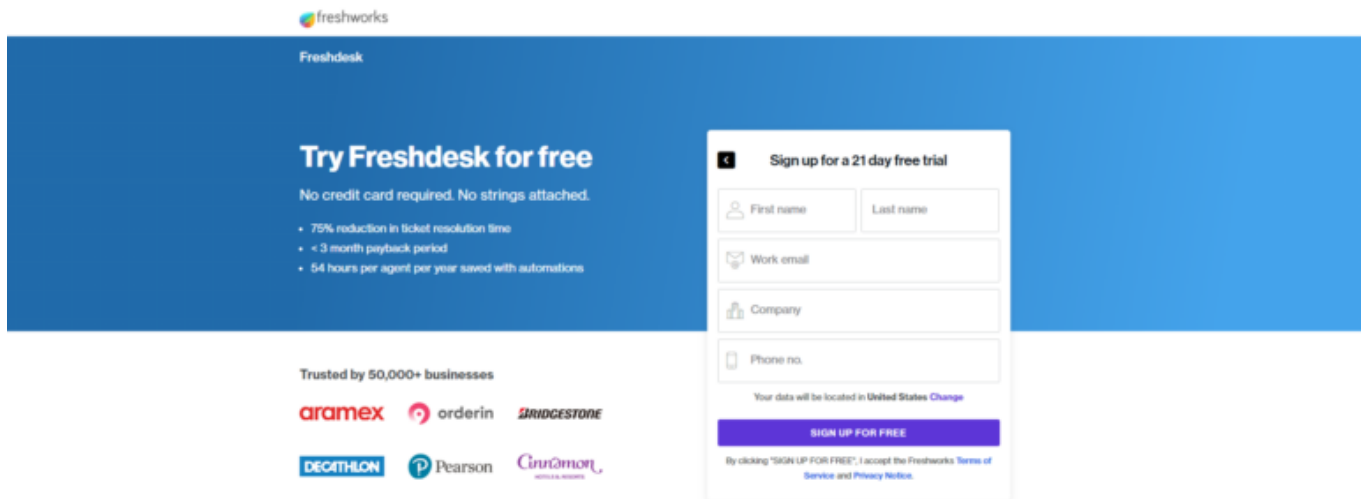
Domain	Enter the URL you use to access your Microsoft Dynamics 365 online account.E.g., "https://xxxxxxx.ccrm4.dynamics.com/"
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2. After filling in the information above, the user can log into the Dynamics 365 online account to use the Dynamics 365 CRM system service.

Freshdesk CRM System

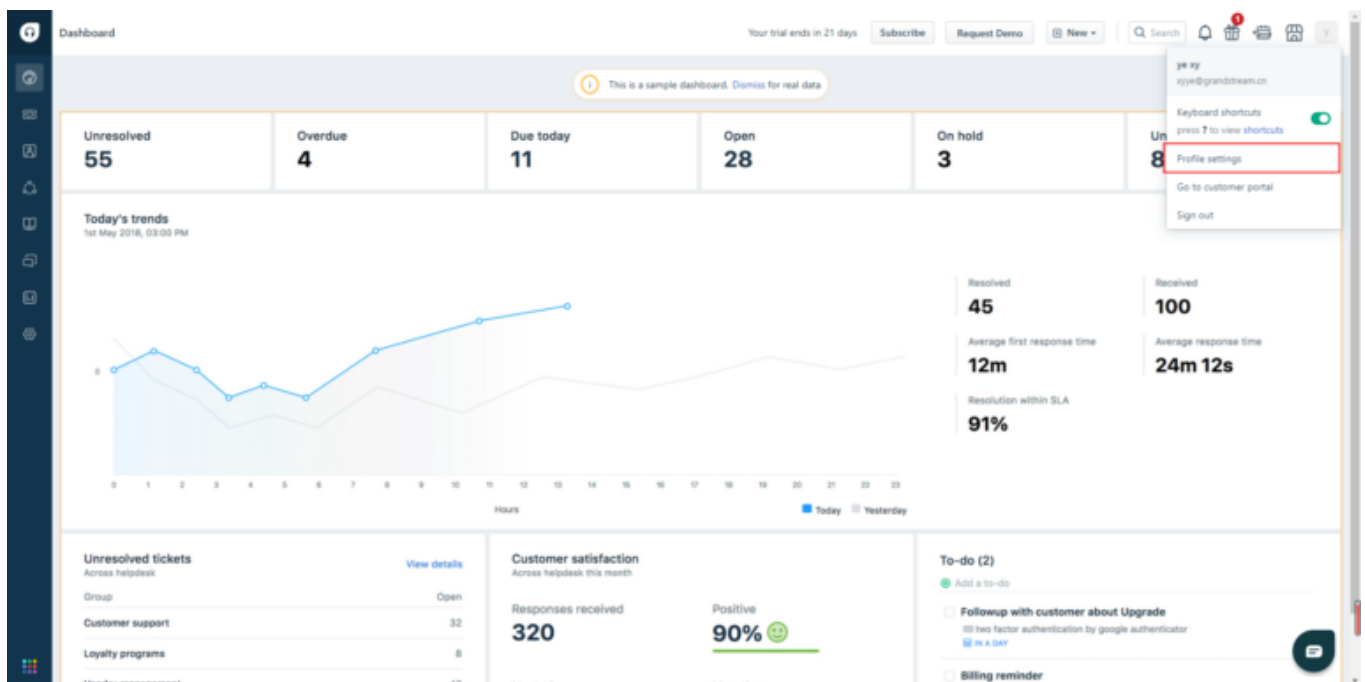
Obtain API KEY and Domain of Freshdesk CRM Account

1. The user can sign up Freshdesk CRM account at <https://support.freshdesk.com/support/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.

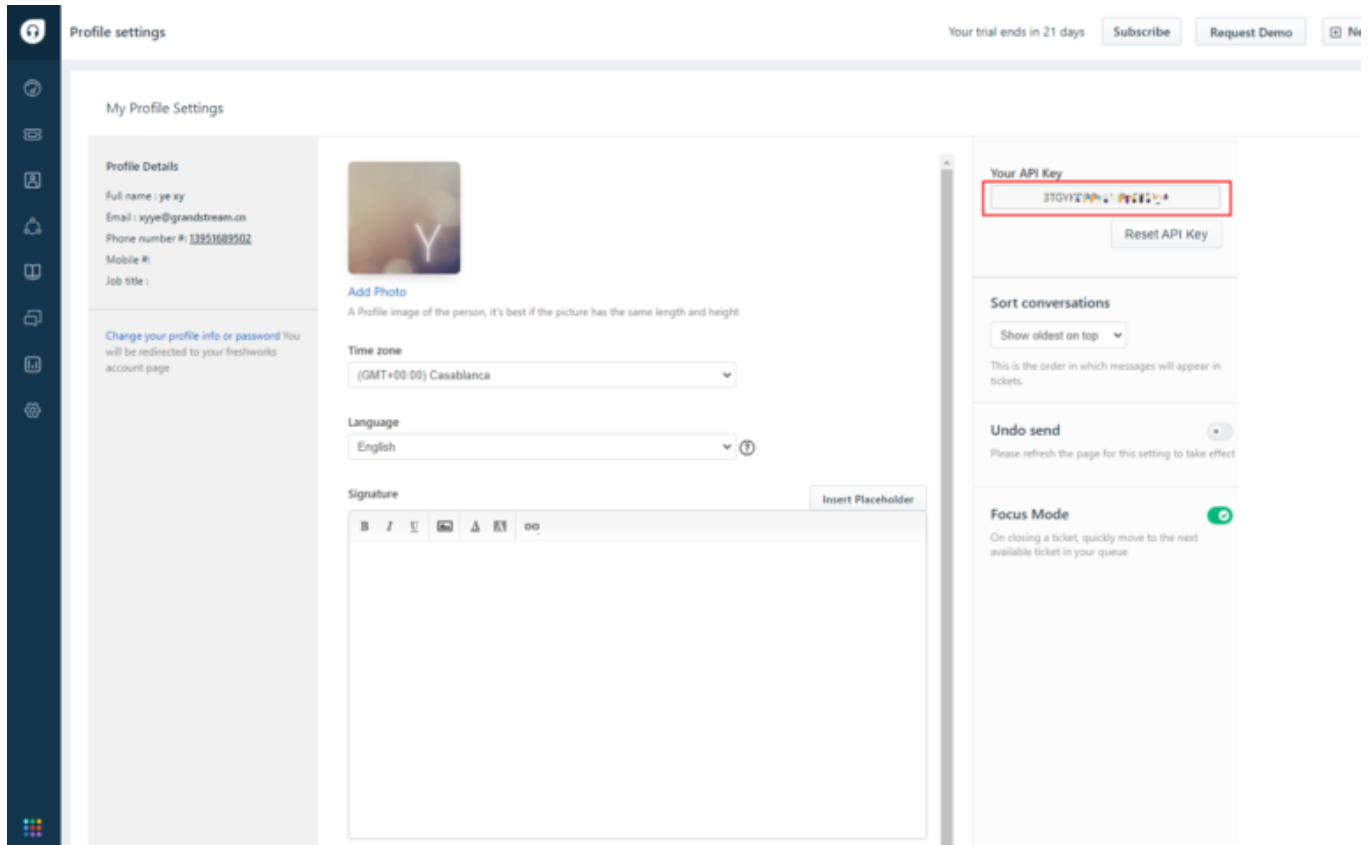


Sign up Freshdesk Account

- 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:

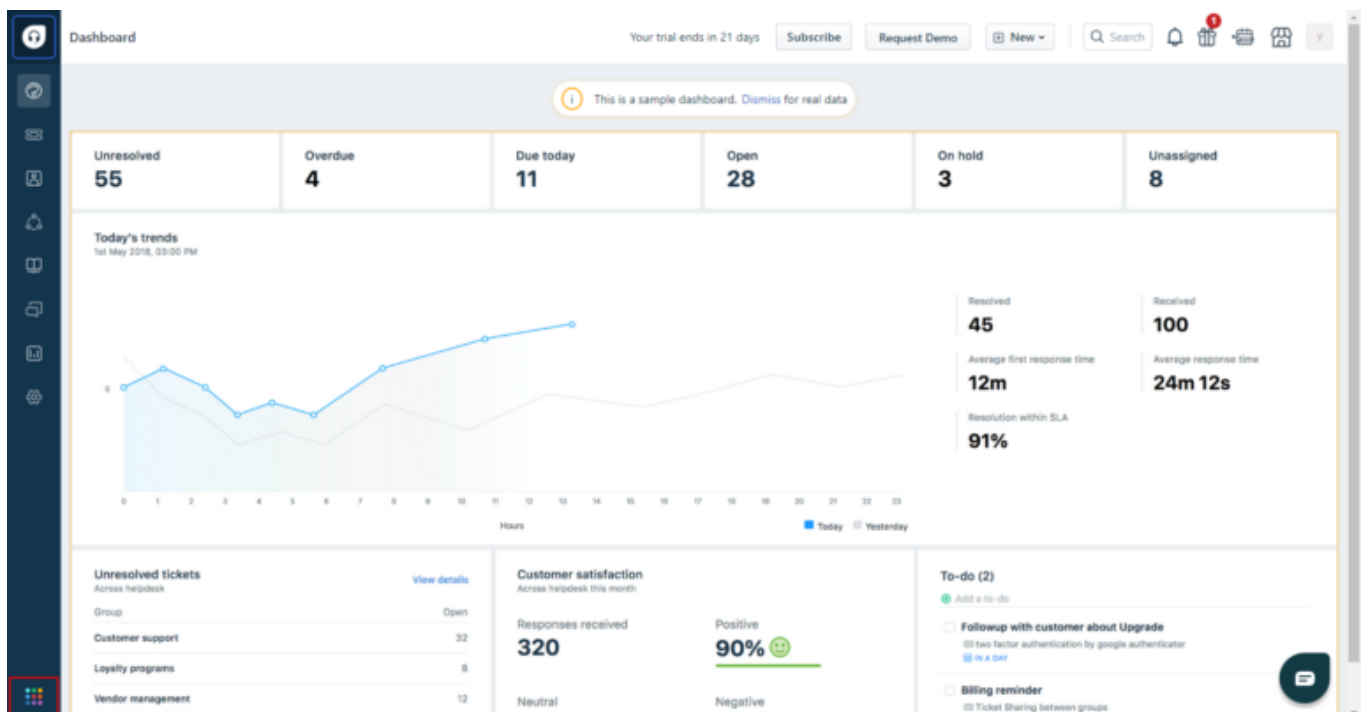


Profile Settings

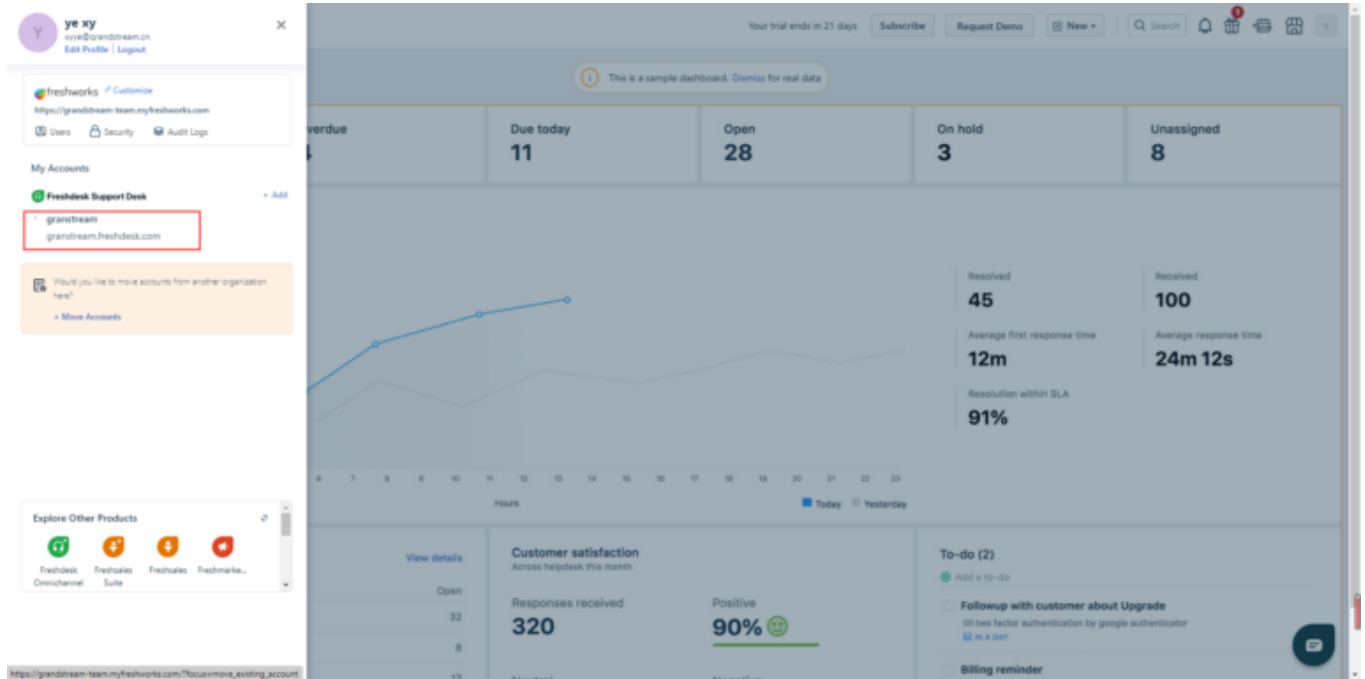


Obtain API Key

- 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".



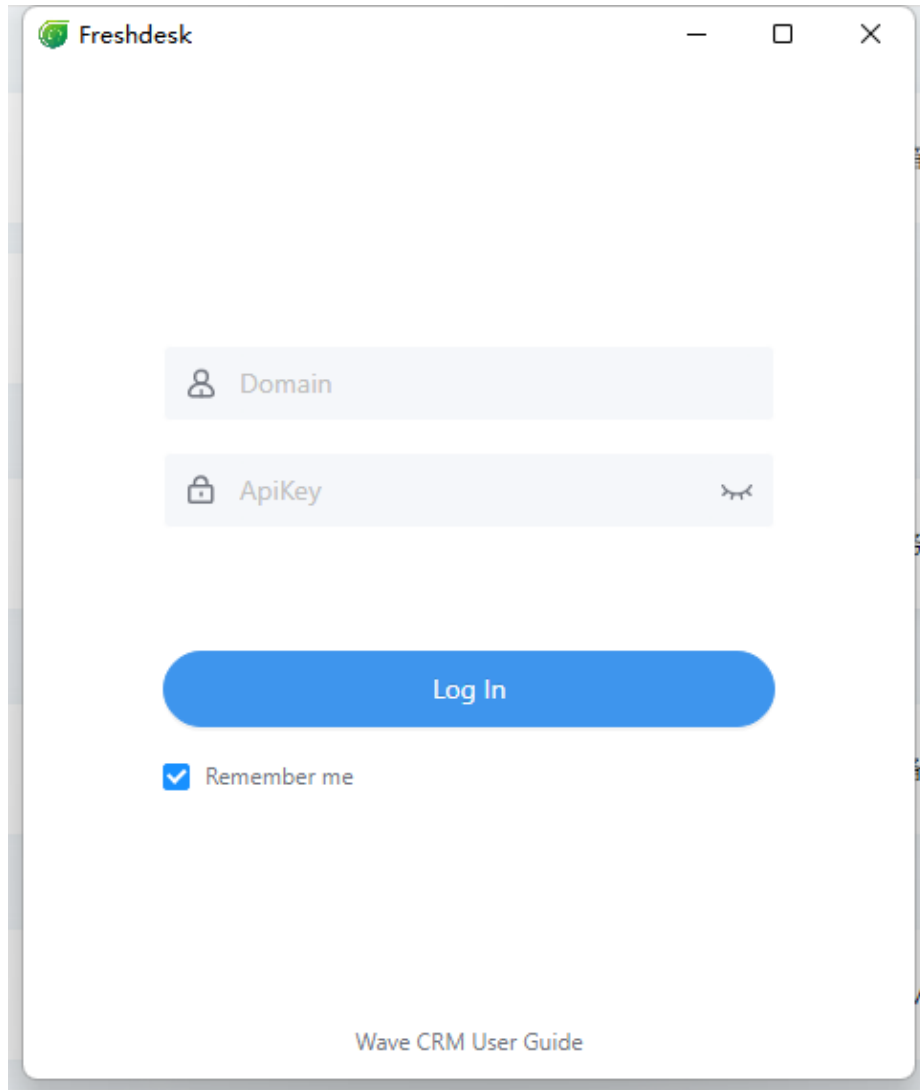
Freshdesk Dashboard



Obtain Domain

Login Freshdesk CRM System through Wave App

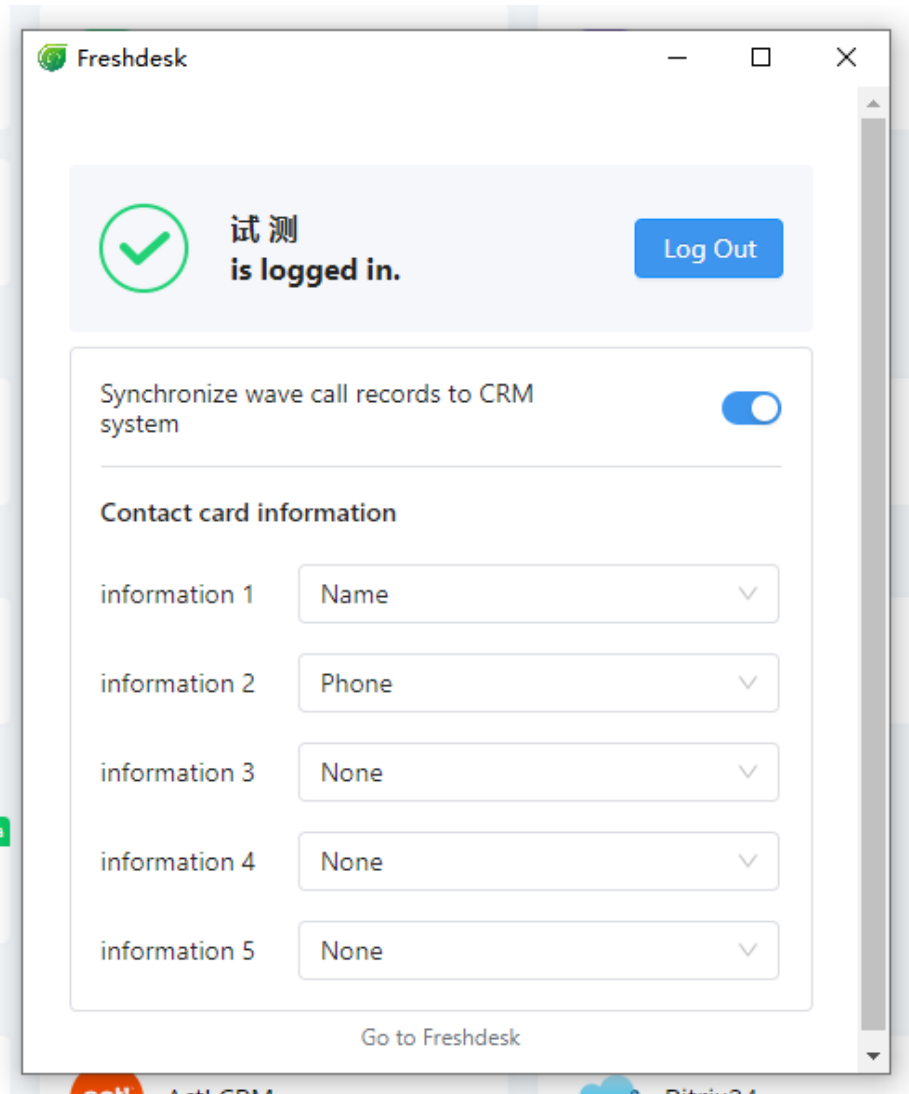
1. The user can install and open the Freshdesk add-in in the "App Store" in the Wave application and fill in the domain and API KEY to log in to the Freshdesk CRM system.



Login Freshdesk CRM System

Domain	Fill in the obtained domain information.
API Key	Fill in the obtained API KEY information.

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.

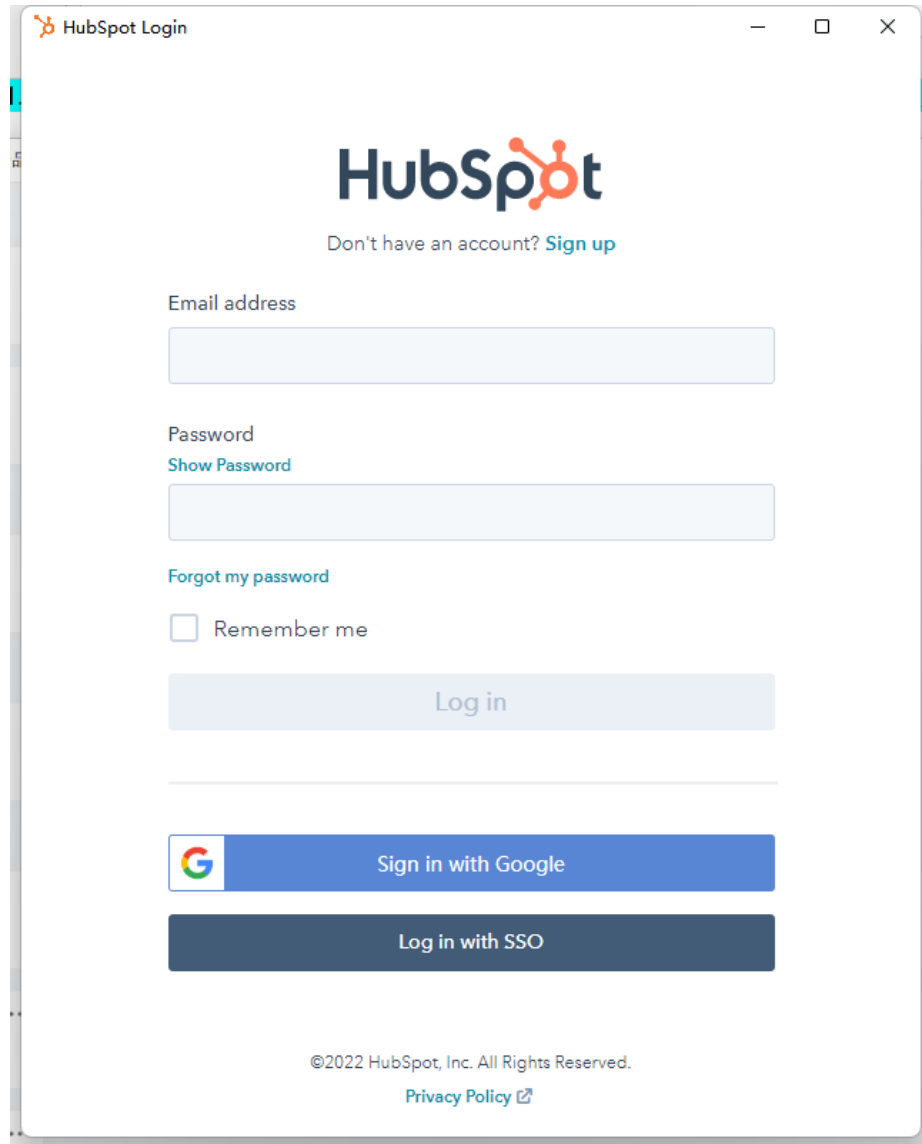


Logged in to Freshdesk CRM System Successfully

HubSpot CRM System

Log into HubSpot CRM System through Wave App

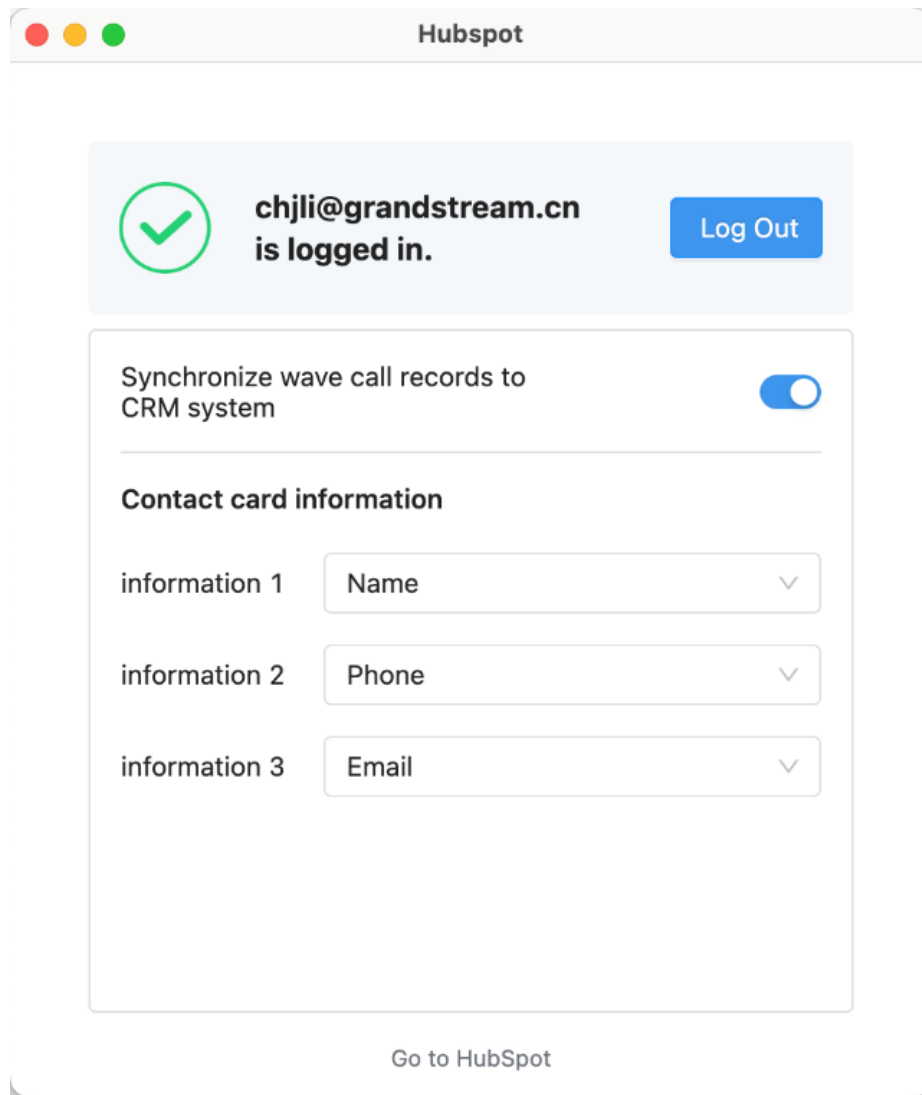
1. The user can install and open the HubSpot add-in in the "App Store" in the Wave application and fill in the Email address and Password to log in to the HubSpot CRM system. Please refer to the screenshot below:

A screenshot of the HubSpot Login window. The window has a title bar with the HubSpot logo and the text "HubSpot Login". The main content area features the HubSpot logo at the top, followed by the text "Don't have an account? Sign up". Below this are two input fields: "Email address" and "Password". The "Password" field has a "Show Password" link next to it. There is a "Forgot my password" link below the password field. A "Remember me" checkbox is located below the "Forgot my password" link. A "Log in" button is positioned below the "Remember me" checkbox. Below the "Log in" button is a horizontal line. Under the line are two buttons: "Sign in with Google" (with the Google logo) and "Log in with SSO". At the bottom of the window, there is a copyright notice "©2022 HubSpot, Inc. All Rights Reserved." and a "Privacy Policy" link with an external link icon.

Log into Hubspot CRM System

Email address	Fill in the email of the Hubspot account.
Password	Fill in the password of the Hubspot account.

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.

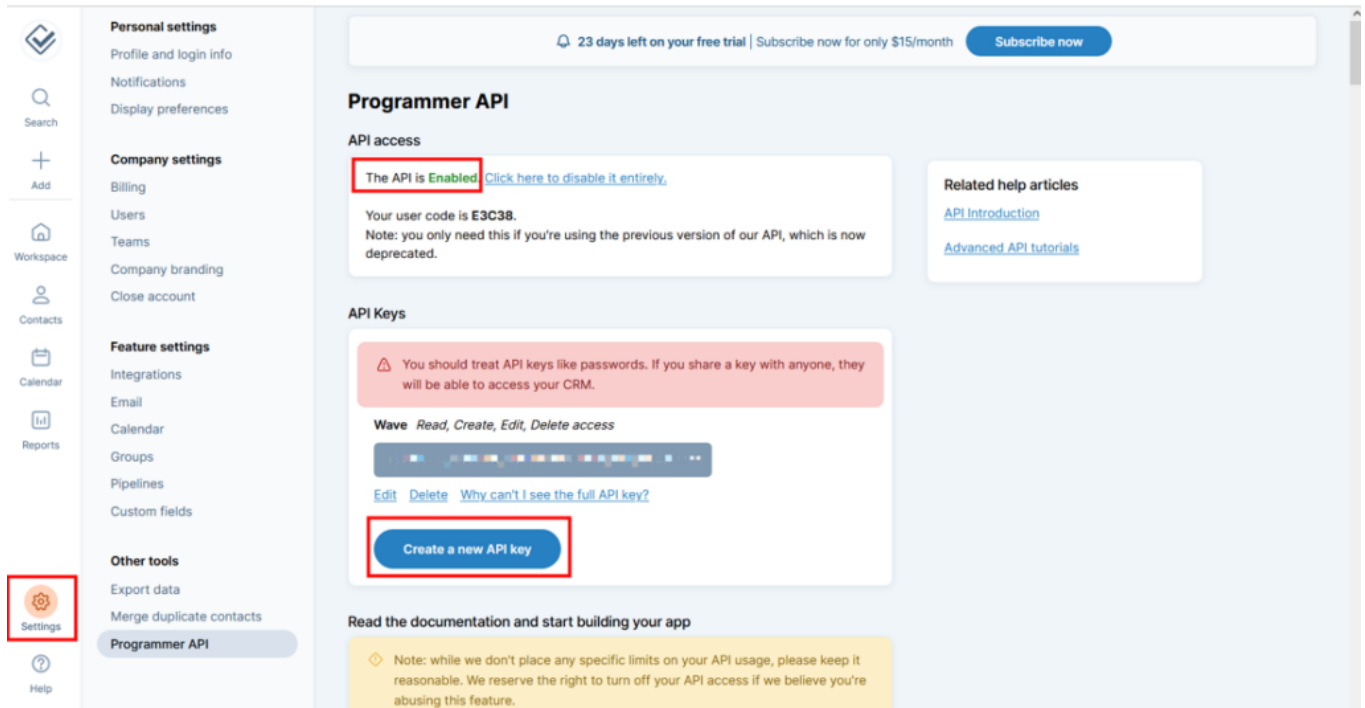


Logged into HubSpot CRM System Successfully

Less Annoying CRM System

Obtain API Key

1. Open <https://www.lessannoyingcrm.com/> in your browser and log in your account.
2. Then you can enable API access and create a new API key for your account on the Programmer API settings page.

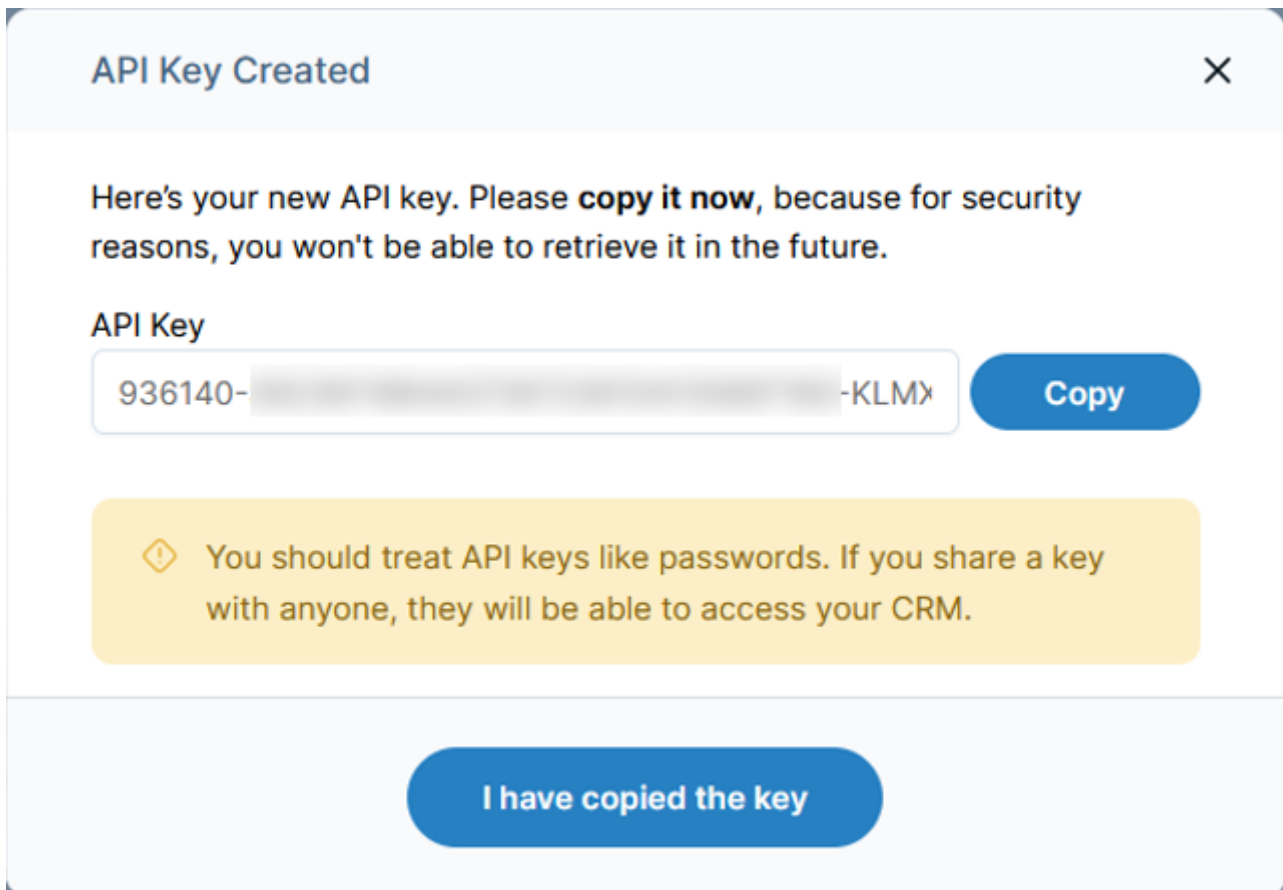


Create a New API Key

3. You need to enter a Nickname when creating the API Key, select all the following permissions, and click to create the API Key.

Create New API Key

4. You can copy the API Key after the API Key has been created successfully.



API Key Created

Log in to Less Annoying CRM System Through Wave App

Users can install the Less Annoying CRM add-in in the Application module of the Wave Desktop application, and enter the API Key to log in to the Less Annoying CRM system:

 API Key



Log in

☒ Remember me

[Wave CRM User Guide](#)

Less Annoying CRM Wave Login Portal

Monday Sales CRM System

Install the Wave add-in on the Monday Sales platform

First, the user needs to install Wave plug-in in the workspace. This can be done from the Monday CRM add-on on Wave. Install the add-on on Wave then open the login screen.

1. On the login screen, press "Click to Install".

Step 1: Monday administrator must install the Wave plugin to your workspaces. [Click to Install](#)

Step 2: Authorize login to your Monday account from Wave.

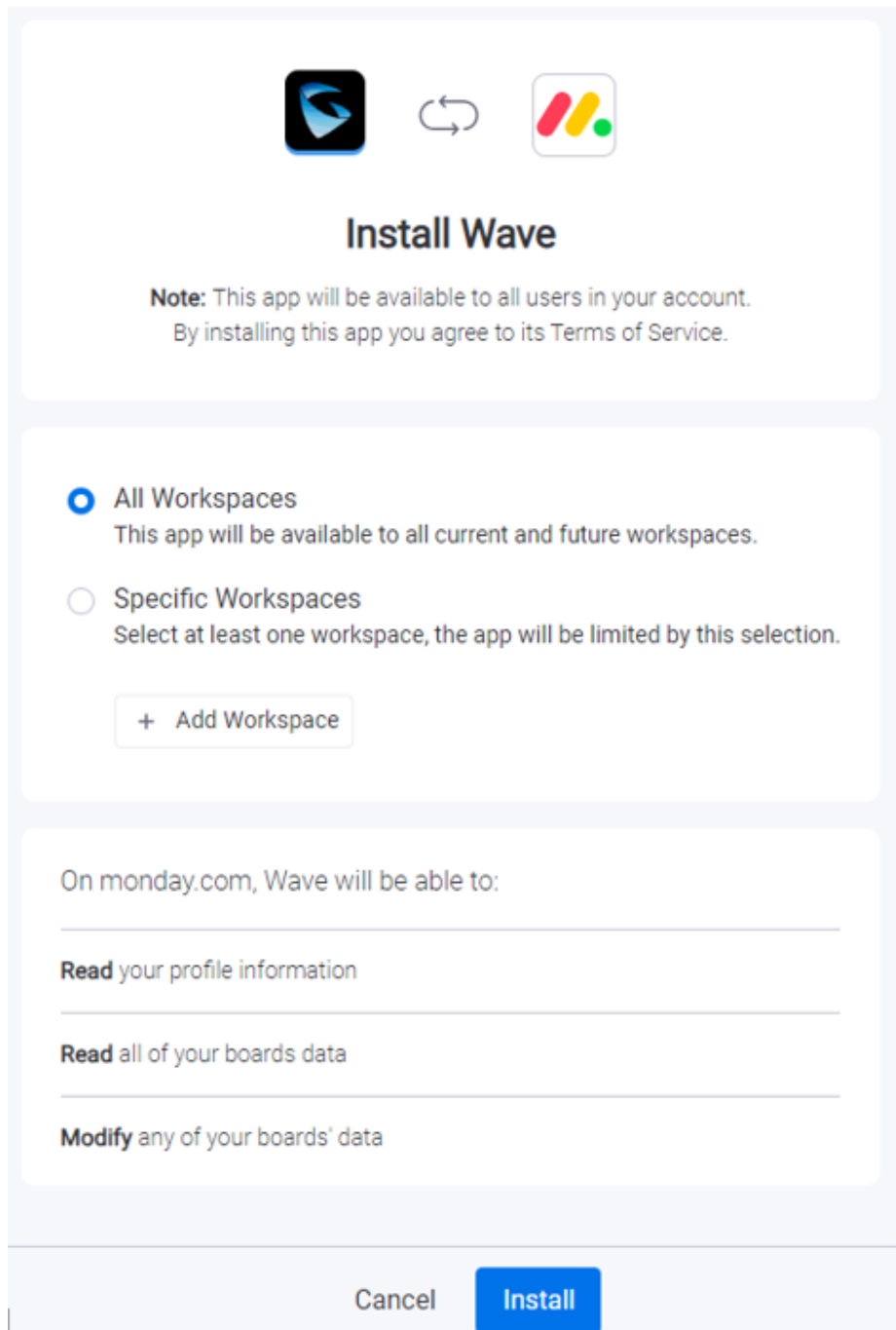
Log in

☒ Remember me

Wave CRM User Guide

Monday Sales CRM Marketplace

2. Then search for the "Wave" add-in for installation.



The image shows a dialog box titled "Install Wave". At the top, there are three icons: a blue square with a white arrow, a circular refresh icon, and the Wave logo (three colored bars). Below the icons, the title "Install Wave" is centered. A note states: "Note: This app will be available to all users in your account. By installing this app you agree to its Terms of Service." There are two radio button options: "All Workspaces" (selected) with the description "This app will be available to all current and future workspaces." and "Specific Workspaces" with the description "Select at least one workspace, the app will be limited by this selection." Below these is a button labeled "+ Add Workspace". A section titled "On monday.com, Wave will be able to:" lists three permissions: "Read your profile information", "Read all of your boards data", and "Modify any of your boards' data". At the bottom, there are "Cancel" and "Install" buttons.

Install Wave

Note: This app will be available to all users in your account.
By installing this app you agree to its Terms of Service.

☒ All Workspaces
This app will be available to all current and future workspaces.

☐ Specific Workspaces
Select at least one workspace, the app will be limited by this selection.

+ Add Workspace

On monday.com, Wave will be able to:

Read your profile information

Read all of your boards data

Modify any of your boards' data

Cancel Install

Monday Sales Wave Integration Installation

- After installation, the Monday Sales CRM system members can install the Monday Sales CRM add-in on the Wave Desktop application.

Log into Monday Sales CRM System Through Wave App

Open the add-in on Wave again to login to your Monday Sales CRM account this time. To do that, please follow the steps below.

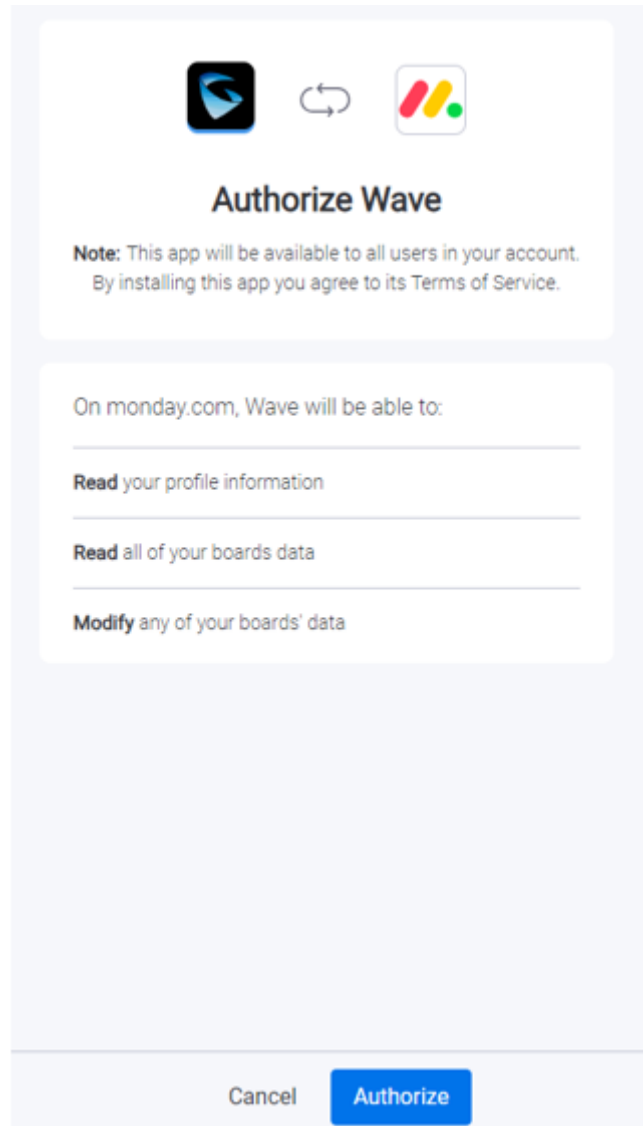
Log in

☒ Remember me

Wave CRM User Guide

Monday Sales CRM Login Page

1. Click the "Log in" button and authorize to log in to the system:



Monday Sales Permissions

2. After the authorization succeeds, that means the user has logged in the Monday Sales CRM add-in:



sqhuang
has logged in

[Log out](#)

Sync Wave Call History to CRM

on >

Custom Contact Display Information

on >

Auto Create Contact to CRM

on >

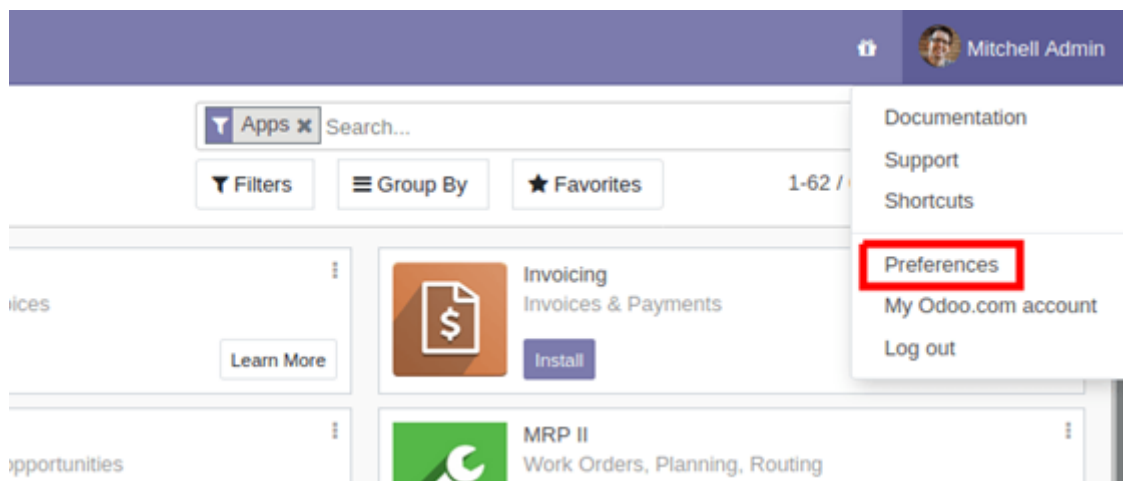
[Go to Monday Sales CRM](#)

Monday Sales Logged in

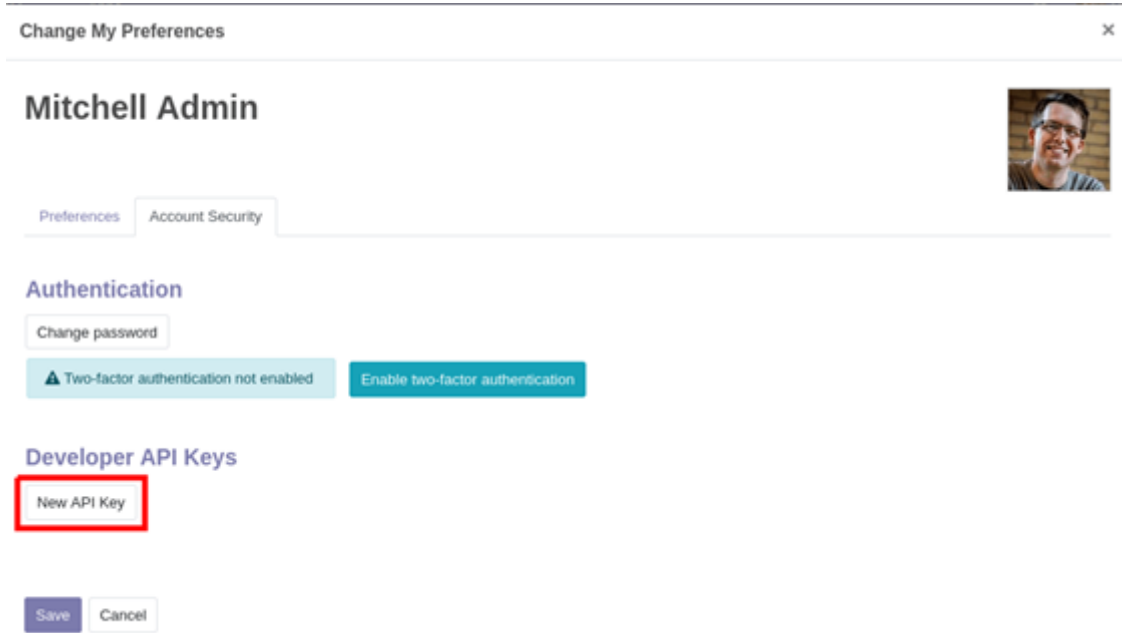
Odoo CRM System

Obtain API Key and Database Server Address

1. Log into Odoo's system on your browser.
2. In order to add a key to your account, simply go to your Preferences (or My Profile):



- Then open the Account Security tab, and click New API Key:



Change My Preferences

Mitchell Admin

Preferences Account Security

Authentication

Change password

Two-factor authentication not enabled Enable two-factor authentication

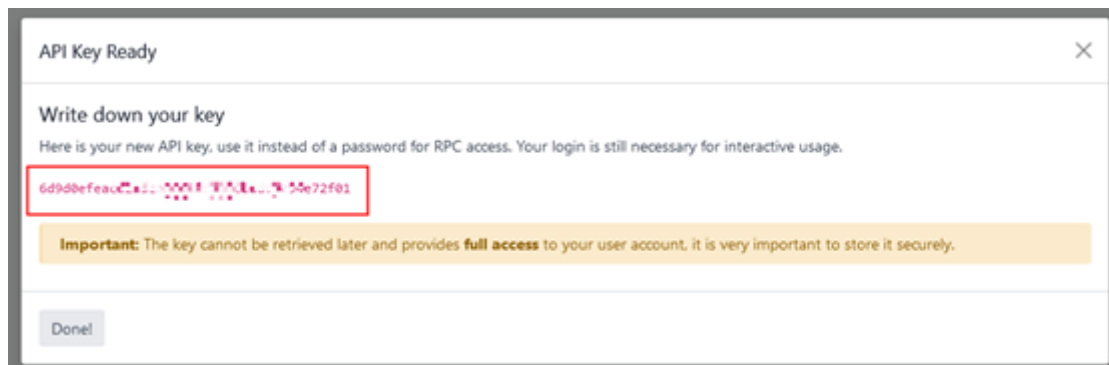
Developer API Keys

New API Key

Save Cancel

New API Key

- Click New API Key, input a description for the key. This description should be as clear and complete as possible: it is the only way you will have to identify your keys later and know whether you should remove them or keep them around.
- Click Generate Key, then copy the key provided. Store this key carefully: it is equivalent to your password, and just like your password the system will not be able to retrieve or show the key again later on. If you lose this key, you will have to create a new one (and probably delete the one you lost).



API Key Ready

Write down your key

Here is your new API key, use it instead of a password for RPC access. Your login is still necessary for interactive usage.

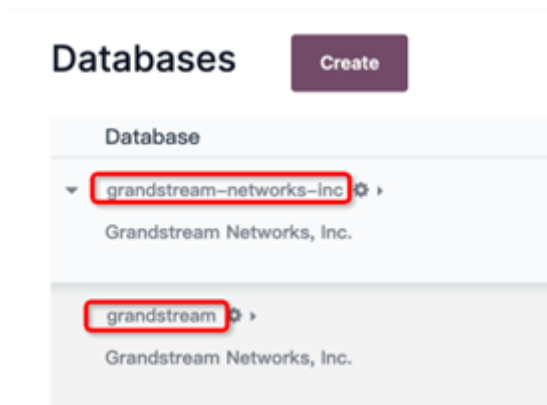
6d9dbefauc...55e72f01

Important: The key cannot be retrieved later and provides full access to your user account, it is very important to store it securely.

Done!

API Key Created

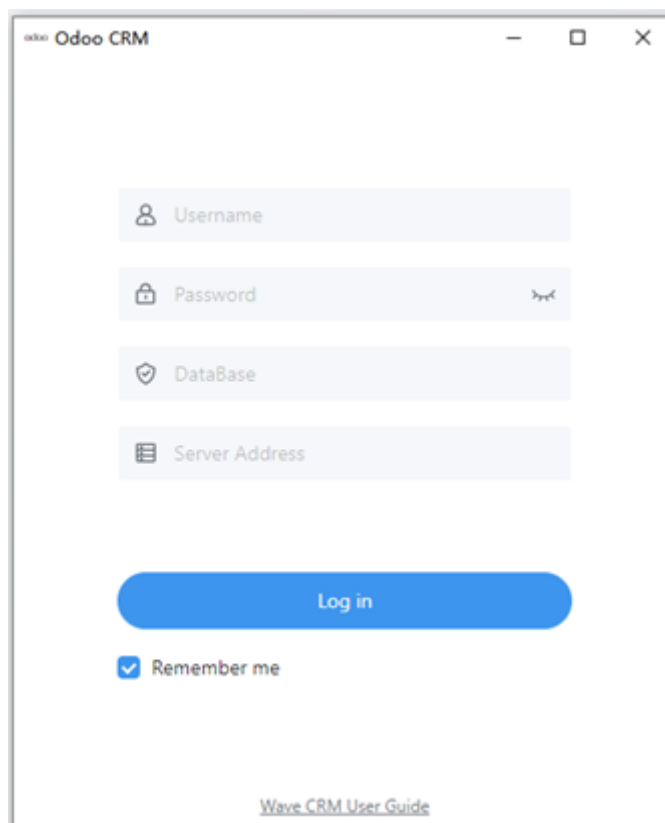
- Then go to your Preferences (or My Profile) -> My databases, go to the database selection page to view your database name. You can also click the "Create" button to create a new database.



Create New Database

Log in to Odoo CRM System Through Wave App

Users can install the Odoo CRM add-in in the Application module of the Wave Desktop application and enter the following information to log in to the Odoo system:



Odoo CRM Add in Wave Portal

Username	Fill in your login email.
Password	Fill in the obtained API KEY information. If you have your own local Odoo system deployed, enter the login password on your local server.
Database Name	Fill in you database name.
Database Server Address	Fill in the access service address in your browser, such as https://grandstream1.odoo.com , or fill in the database address of your local server.

- AI summary synchronization

Under Sync Wace Call History to CRM, the user can configure the synchronization of the call summary done by AI to the CRM system as a call note.

Odoo CRM

< Sync Wave Call History to CRM

Sync Wave call history to CRM system ☒

Sync AI Summary to CRM System ☒

* Call Subject
Wave PhoneSystem Call

* Answered Inbound Call
[DateTime]: Incoming call from [Number] [Name] to [Agent]

* Missed Call
[DateTime]: Missed call from [Number] [Name] to [Agent]

* Answered and Unanswered Outbound Call
[DateTime]: Outgoing call from [Agent] to [Number] [Name]

Sync AI Summary to CRM System

Oracle Netsuite CRM System

Oracle Netsuite administrator needs to configure the Token-based Authentication (TBA)

Before using the Oracle Netsuite CRM add-in on the Wave Desktop application, the administrator needs to configure the Token-based Authentication (TBA) following the steps below on the Oracle Netsuite system, and assign Token-based Authentication roles to users.

To set up TBA in your NetSuite account:

1. Enable the Token-based Authentication Feature
2. Set Up Token-based Authentication Roles and Token-based Authentication (TBA) Permissions
3. Assign Users to Token-based Authentication Roles

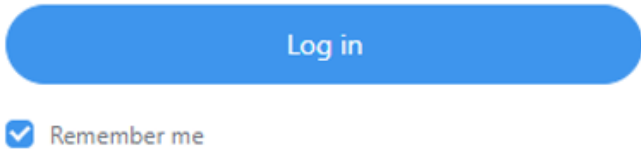
References:

Oracle Netsuite User Manual

Log into Oracle Netsuite CRM System Through Wave App

Prerequisites: The Oracle Netsuite administrator has assigned a Token-based Authentication role to you Oracle Netsuite account.

1. The user can install and open the Oracle Netsuite add-in in the "App Store" in the Wave application.
2. Then, please click the "Log in" button on the following interface, and enter the Oracle Netsuite account to log in to the add-in.



Log in

☒ Remember me

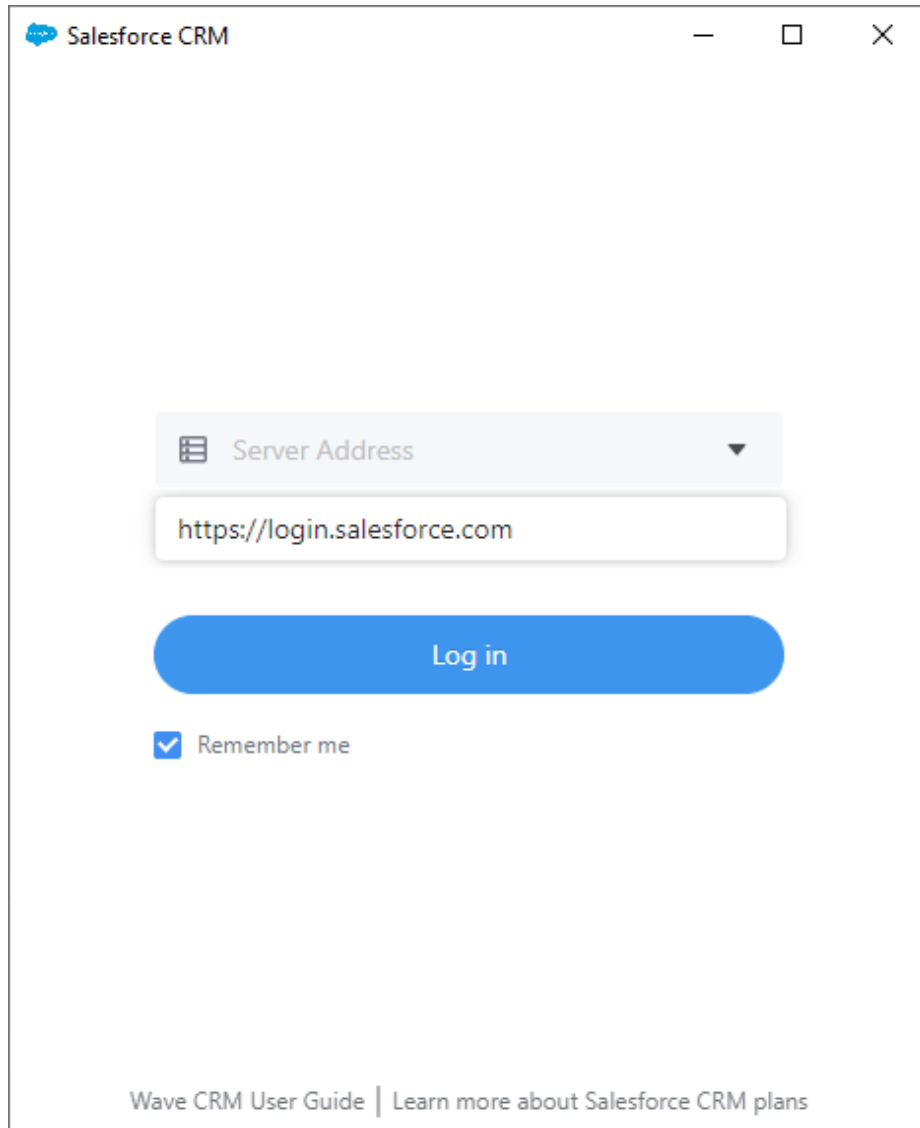
[Wave CRM User Guide](#)

Oracle Netsuite Login Page

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.

A screenshot of a web browser window titled "Salesforce CRM". The window contains a login form. At the top, there is a "Server Address" dropdown menu with a list icon on the left and a downward arrow on the right. Below this, a text input field contains the URL "https://login.salesforce.com". Under the input field is a blue rounded rectangular button labeled "Log in". Below the button is a checkbox that is checked, followed by the text "Remember me". At the bottom of the window, there is a footer link that reads "Wave CRM User Guide | Learn more about Salesforce CRM plans".

Salesforce CRM

Server Address

https://login.salesforce.com

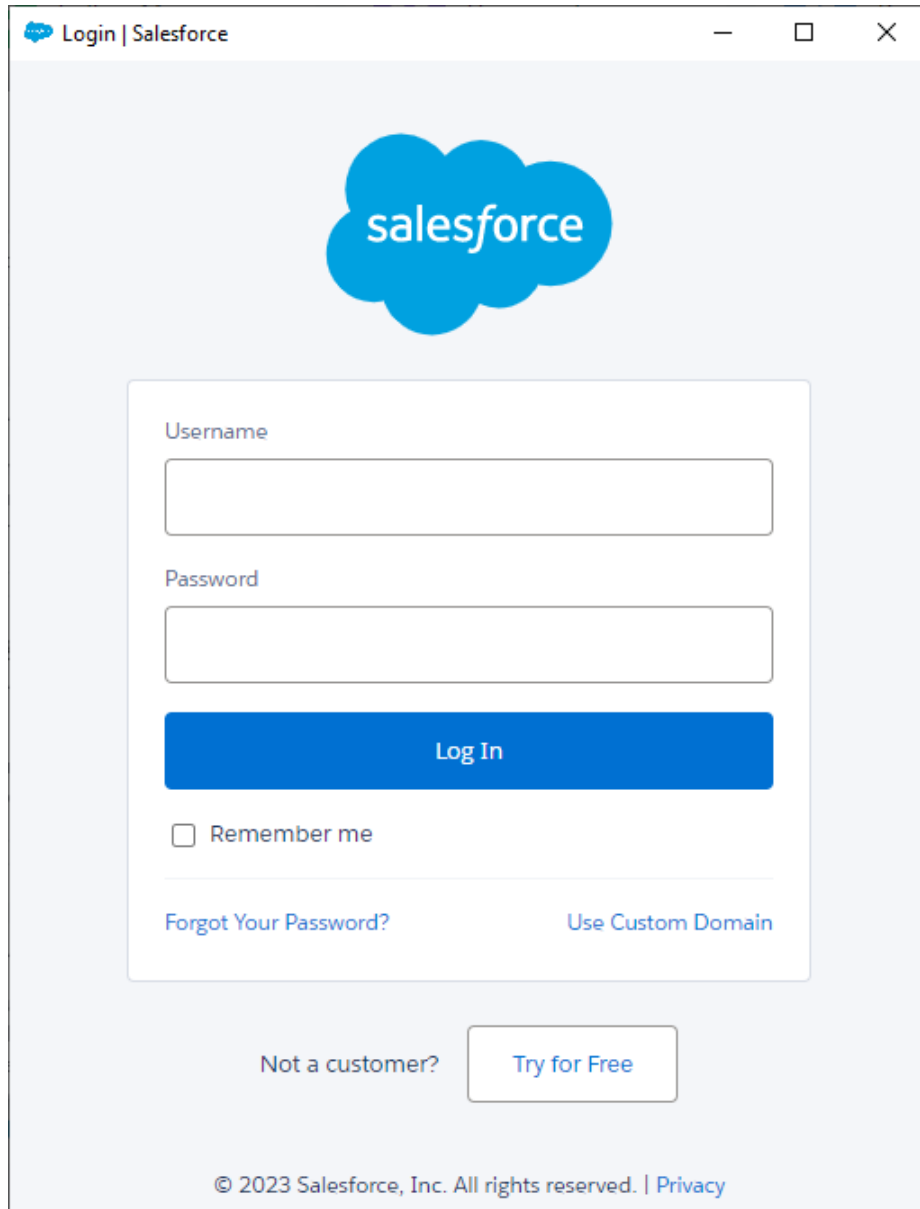
Log in

☒ Remember me

[Wave CRM User Guide](#) | [Learn more about Salesforce CRM plans](#)

Salesforce Server Address

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



Salesforce Log in Portal

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

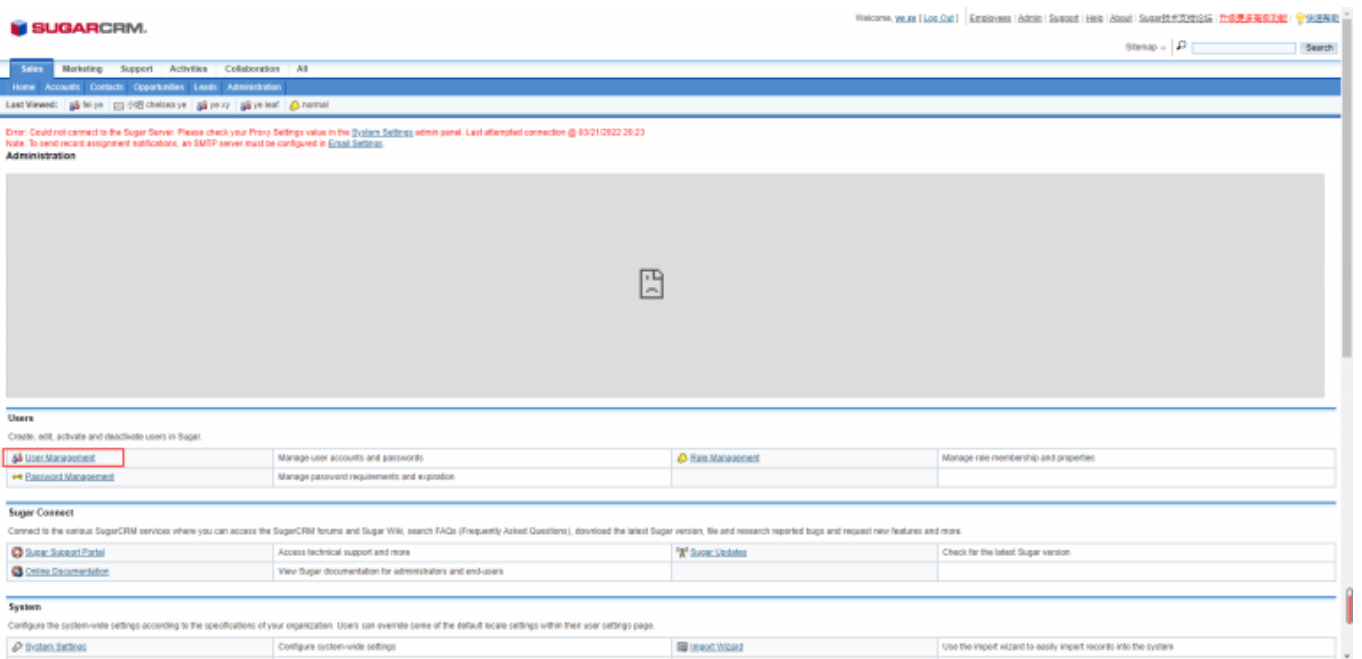
1. Users need to set up the Sugar CRM system locally by using the related application. Users need to download the Sugar CRM system installation package "SugarCRM.exe", install the application on the PC, and set the admin username, password, and Web server installation address/port during the installation 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.

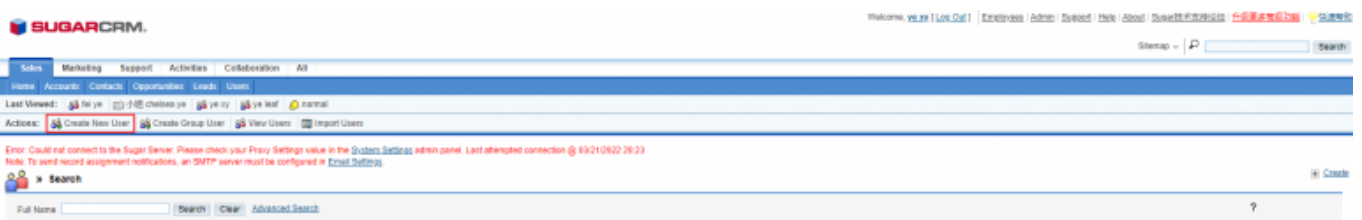


Sugar CRM System Main Interface



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:



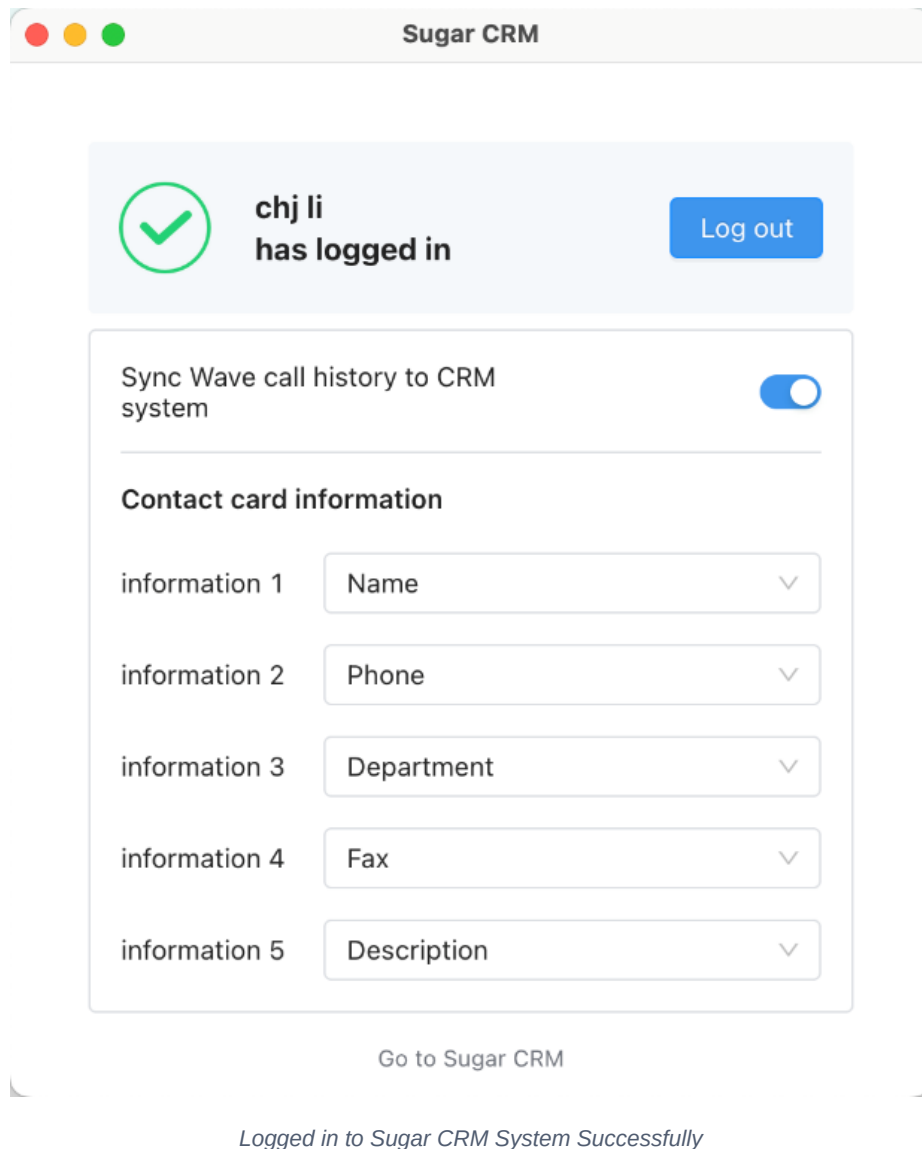
Create New User Option

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

- 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:



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

Apache and MySQL Configuration Parameters



Important Note

Please choose the port numbers on which Apache and MySQL should run. If you are not sure what port numbers are available, please leave the default numbers as they are. Please pick a password you would like to set for the MySQL database administrator.

Enter the Apache web server port number

Apache Port

Enter the MySQL database connection parameters

User Name

Password

MySQL Port

vtigerCRM620

Previous Next Cancel

Install Vtiger CRM System I

vtigerCRM620

vtigerCRM Configuration Parameters
User and Currency Configuration Parameters

CRM Administrator User Settings

User Name: admin

Password: admin

Email: xyye@grandstream.cn

Select the default Currency for vtigerCRM

Currency Name: USA, Dollars

☐ Populate Database with Demo data

Previous Next Cancel

Install Vtiger CRM System II

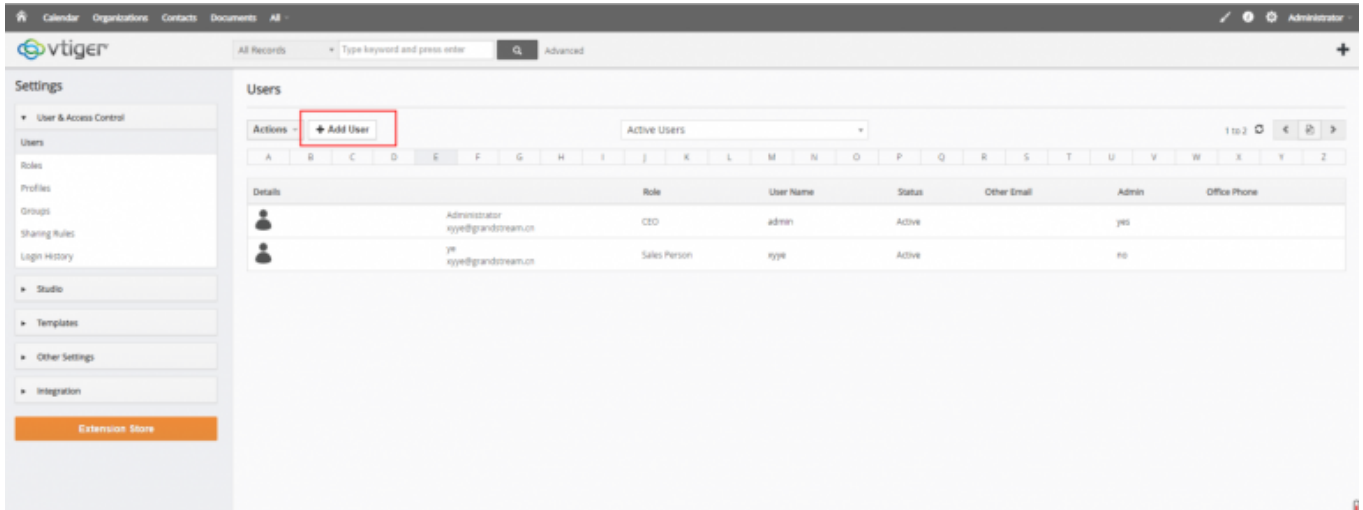
3. After installing the application, users can run the Vtiger CRM application, and the user will be directed to the Vtiger CRM service page for confirmation purposes. Then, the user can log in to the Vtiger CRM system with the admin username and password.

- 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.

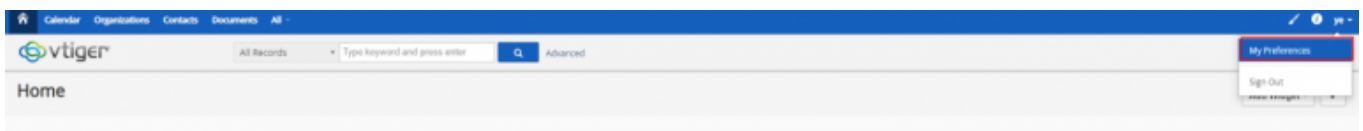


Manage Users

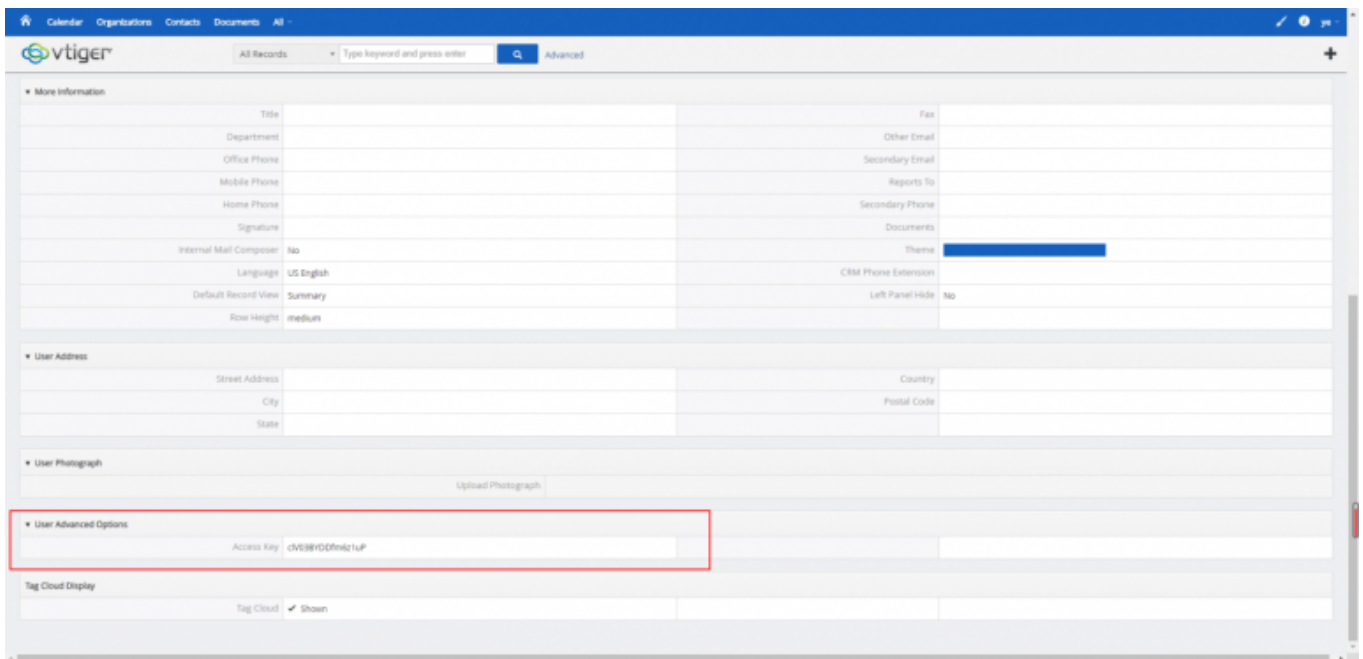


Add a User

- 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:



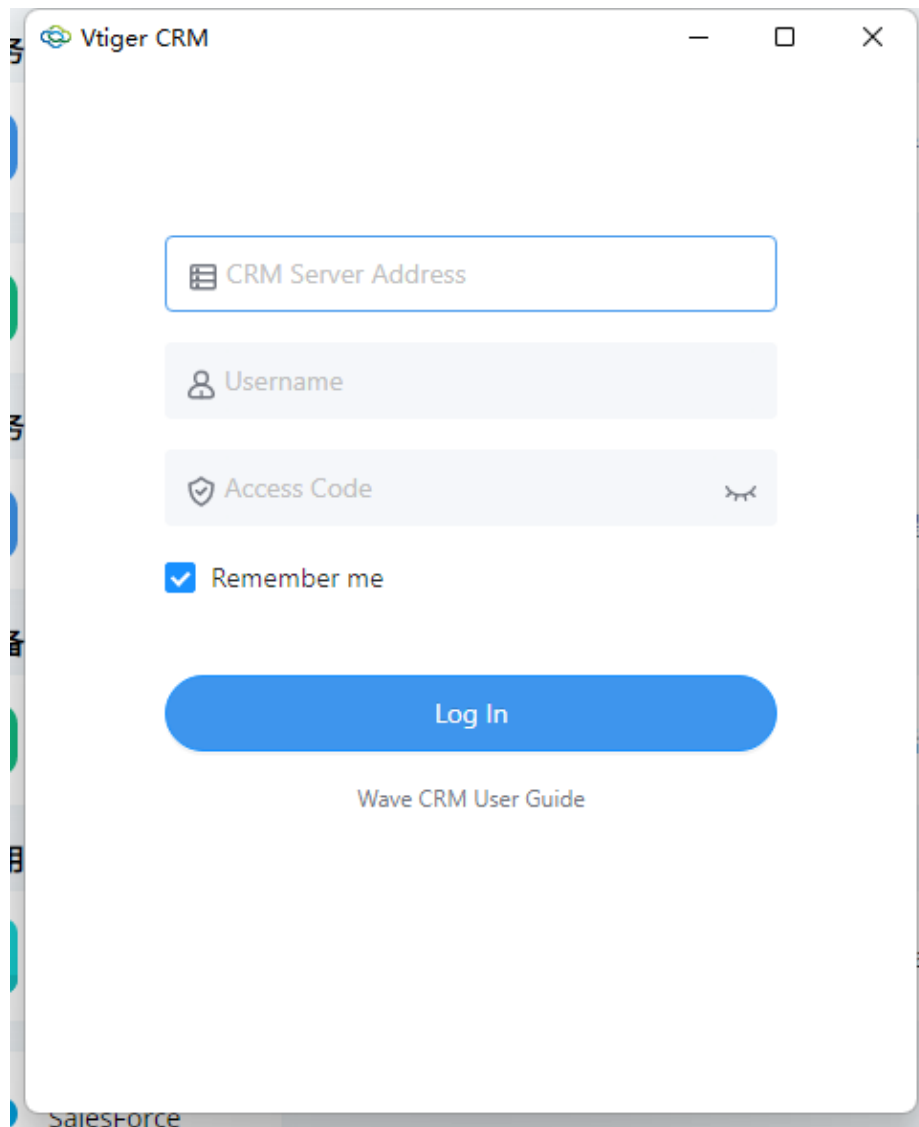
My Preferences Option



Obtain Access Code

Login Vtiger CRM System through Wave App

- 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.

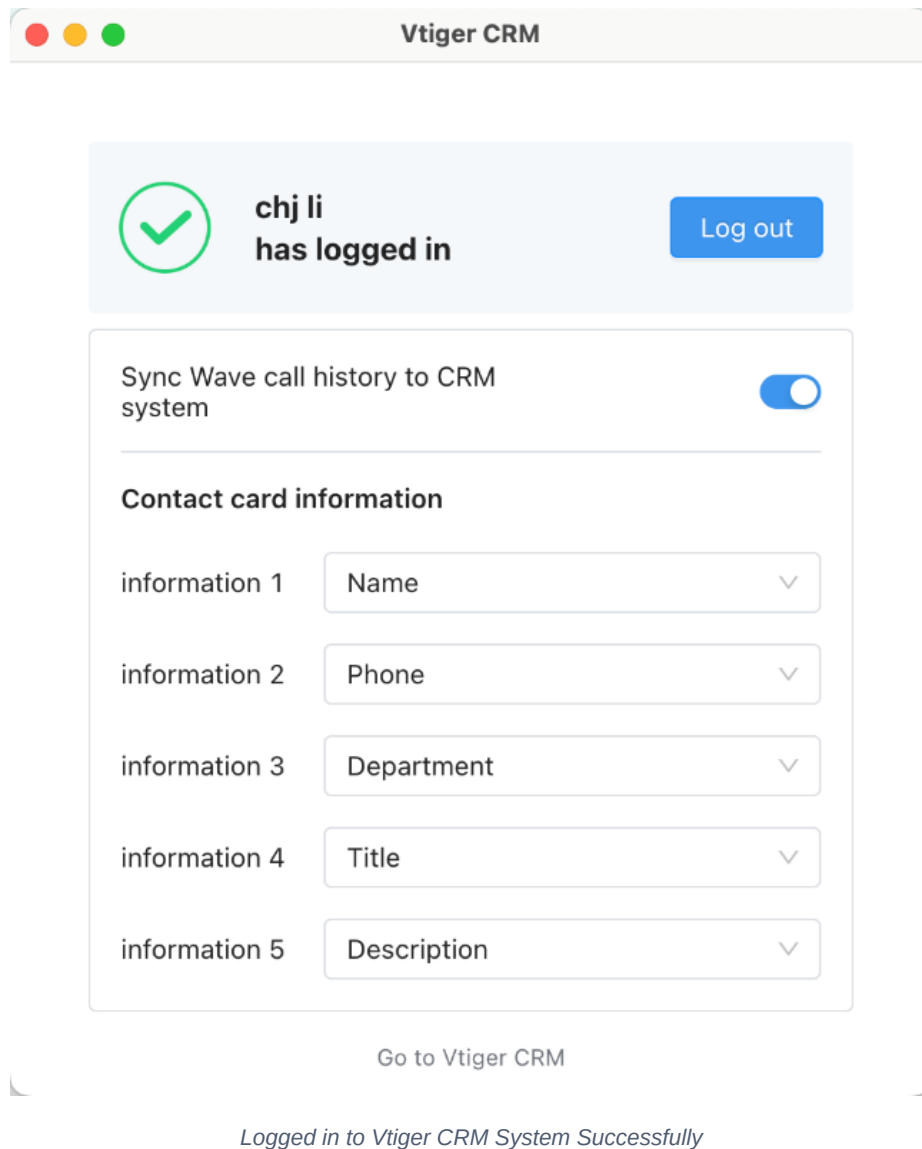


Log in Vtiger CRM System

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:



Only users with **admin permissions** can successfully retrieve CRM information through the Wave application.

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

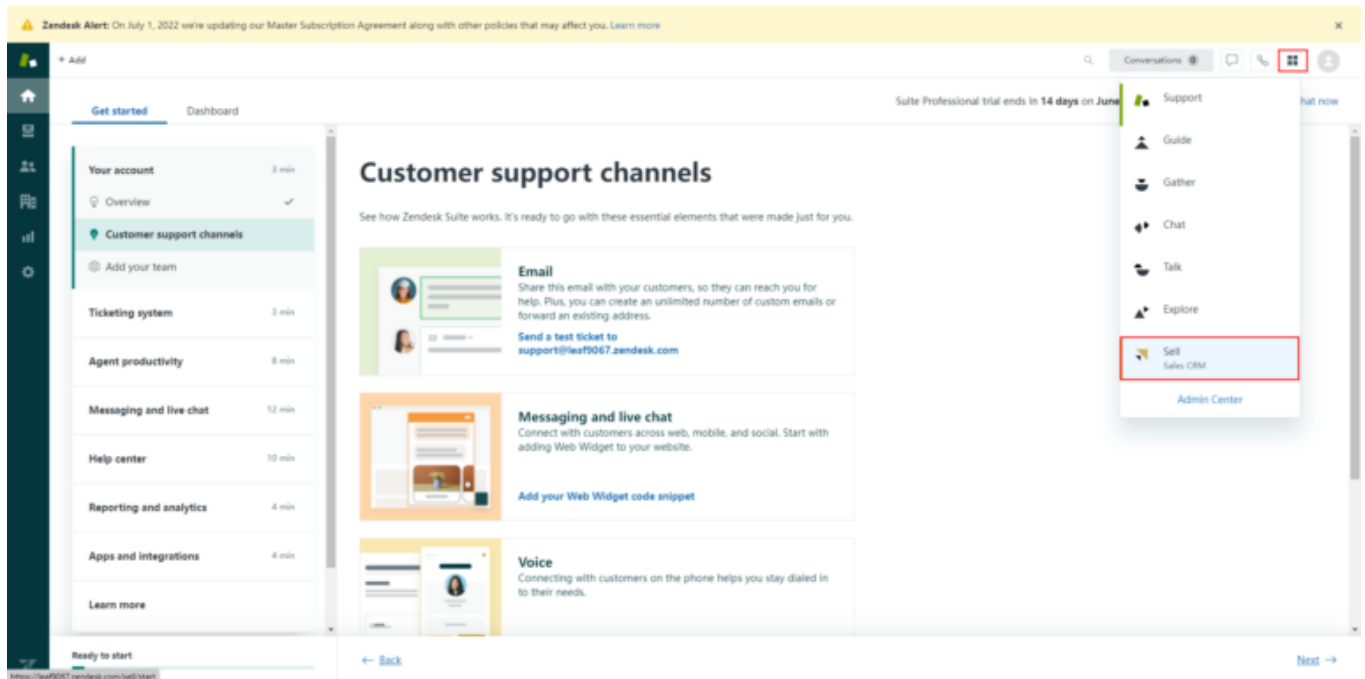
Start your free Zendesk trial

Work email

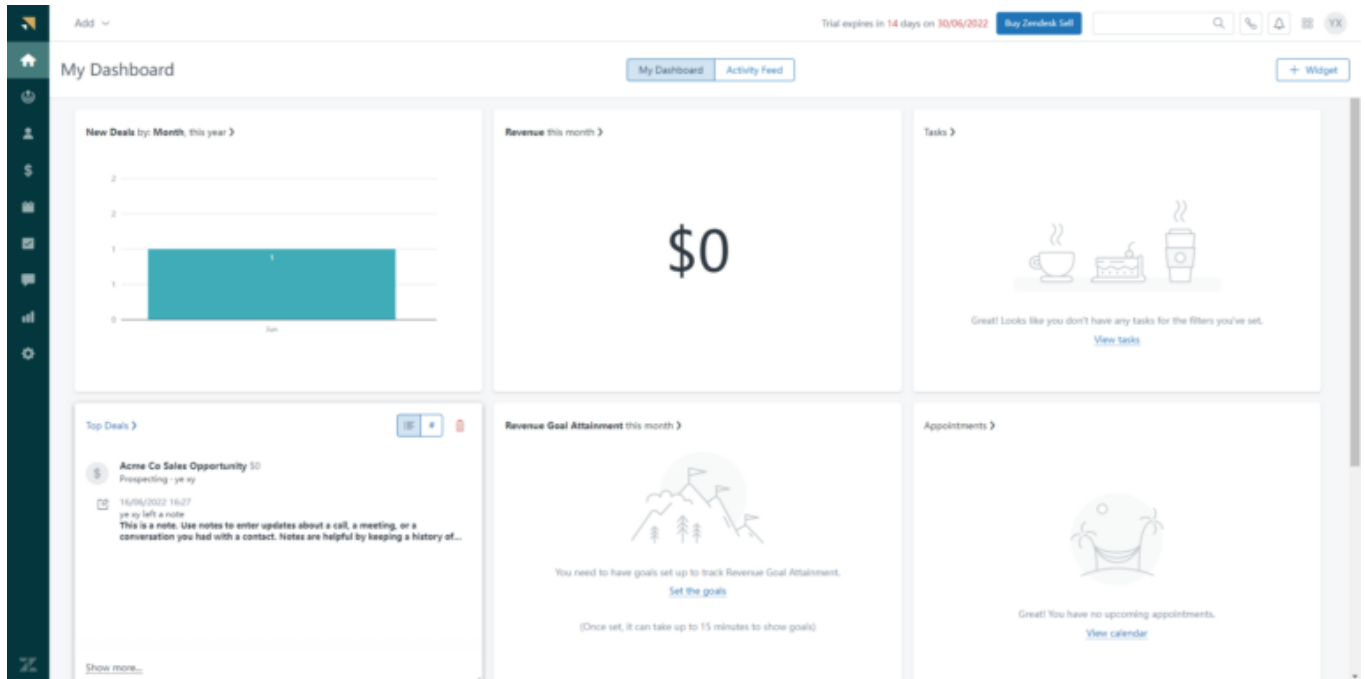
Next

Sign Up Zendesk CRM Account

- On the main page of the Zendesk CRM system, the user can click the icon 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:



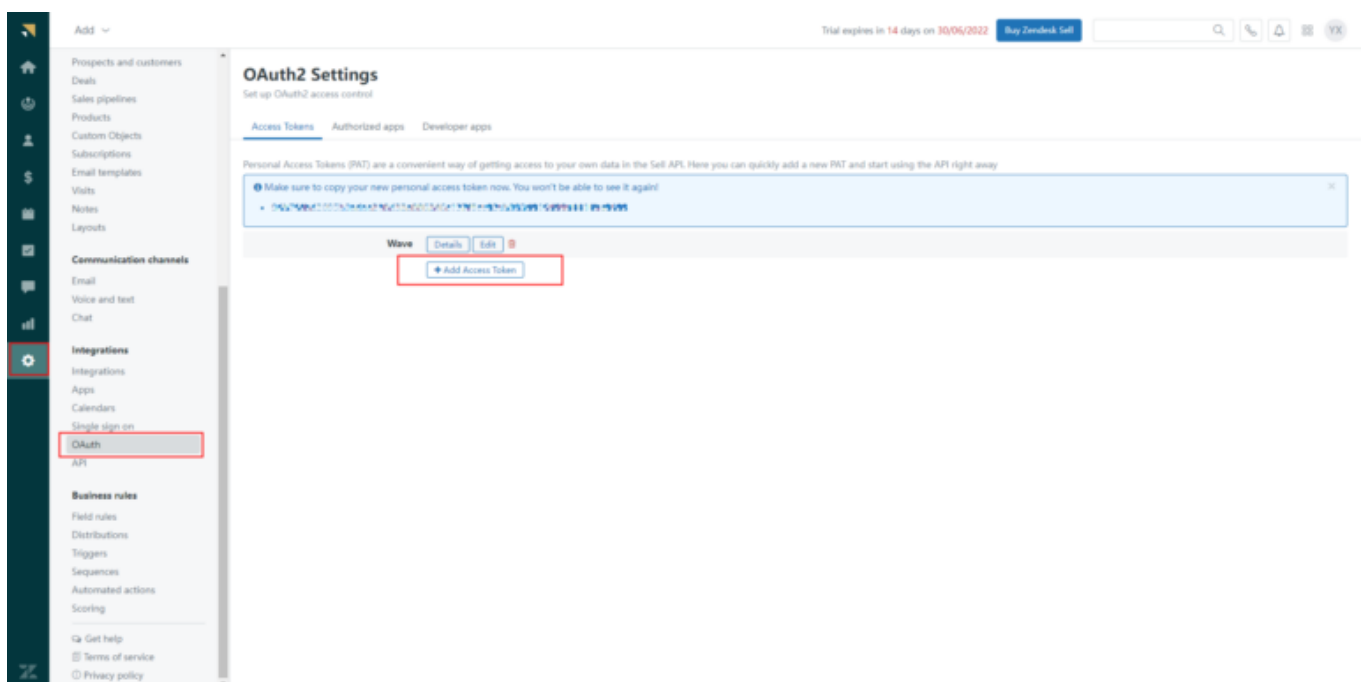
Zendesk Get Started Page



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.

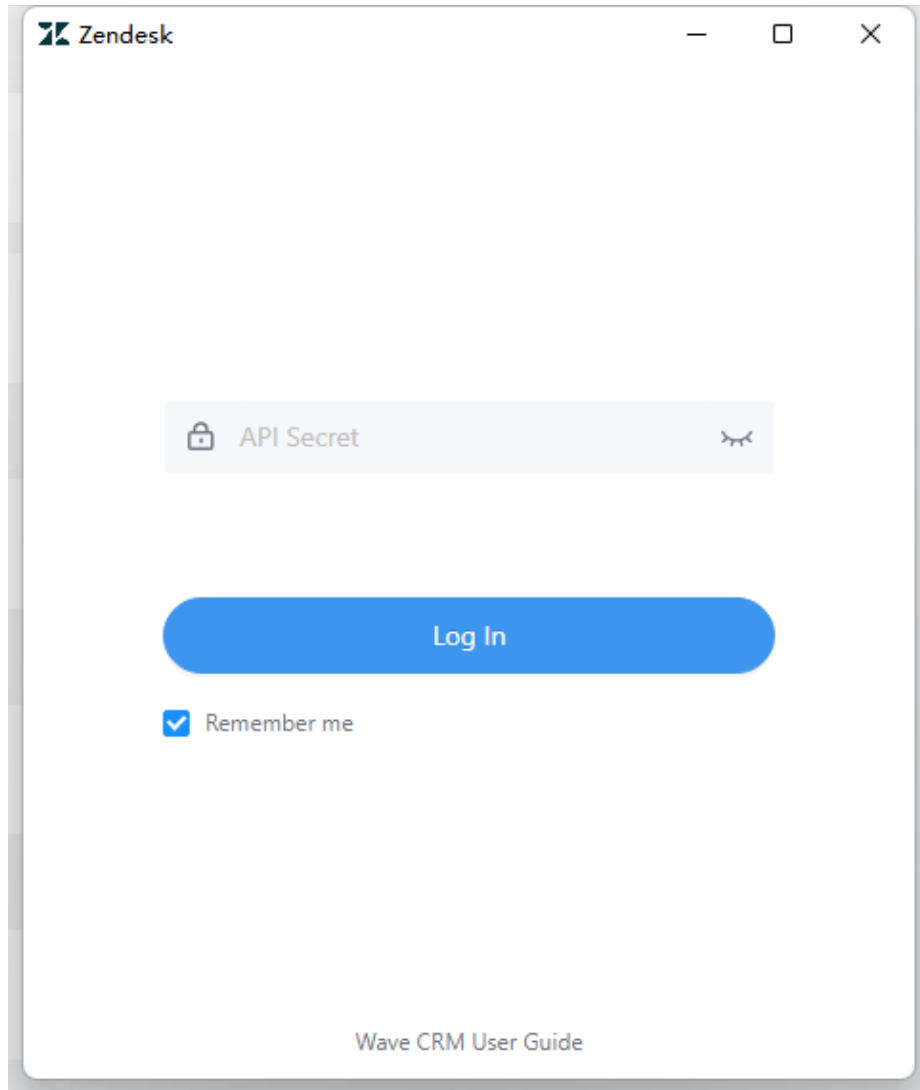


Obtain Zendesk API Secret

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

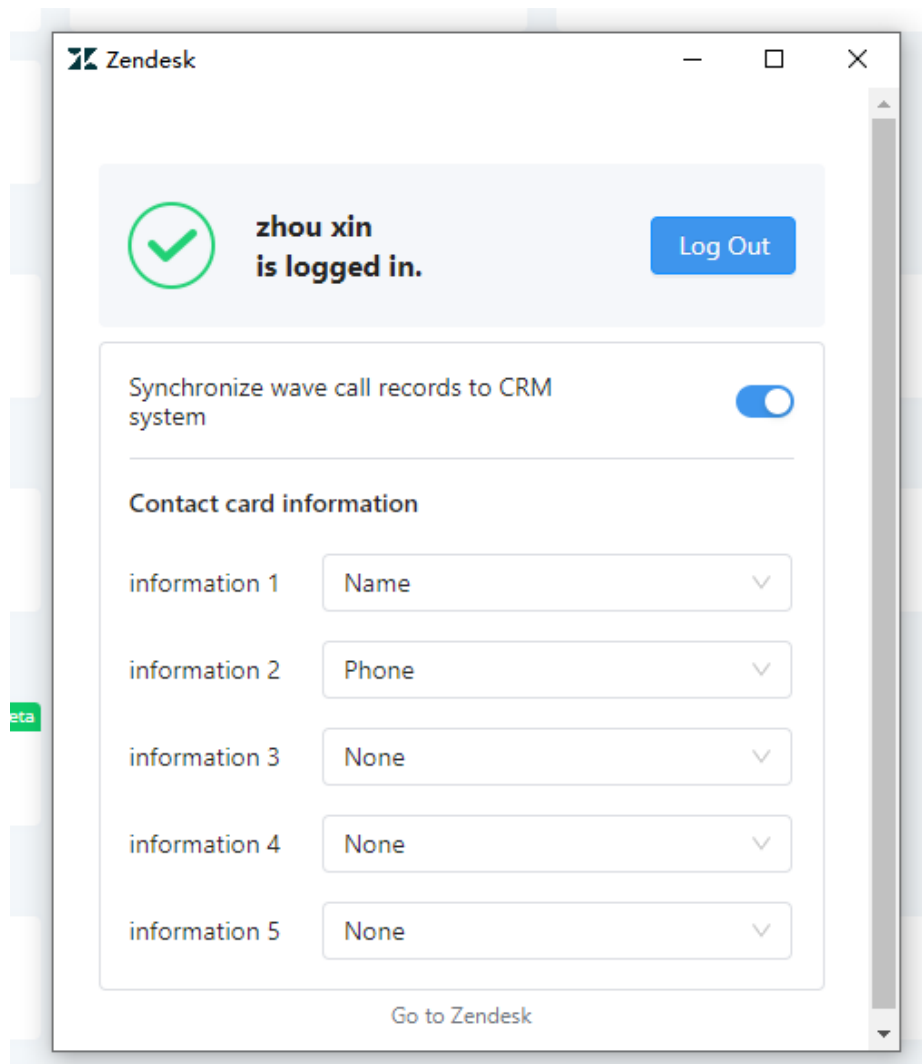
1. The user can install and open the Zendesk add-in in the "App Store" in the Wave application and fill in the Email address and Password to log in to the Zendesk CRM system. Please refer to the screenshot below:



Log into Zendesk CRM System

API Secret	Fill in the API Secret obtained from Zendesk CRM system.
------------	--

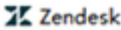
2. The user can log in Zendesk CRM system after filling in the API Secret.



Logged Into Zendesk CRM System Successfully

Automatic Ticket Creation

The user can create support tickets through Zendesk add-in.


Zendesk
—
□
×

<
Auto Create Tickets

Auto Create Tickets
☒

* Create Tickets on Call Direction

All

* Zendesk Subdomain

abc

* Zendesk Email Address

* Zendesk API Token

* Ticket Title

Wave [Number]

* Ticket Descriptions

New

Zendesk

Auto Create Tickets	Toggle on/off ticket creating
Create Tickets On Call Direction	Choose what call direction to create tickets for. All (including outgoing calls and incoming calls. This is the default setting. Outgoing calls (including unconnected calls) Incoming calls (including unconnected calls)
Zendesk Subdomain	Enter the subdomain which had been created on Zendesk.
Zendesk Email Address	Enter the email address.
Zendesk API Token	Enter the API token.
Ticket Title	Enter the ticket title. By default the title is: "Wave [Contact Number]".
Ticket Description	Enter the ticket description. By default, the description is "New".

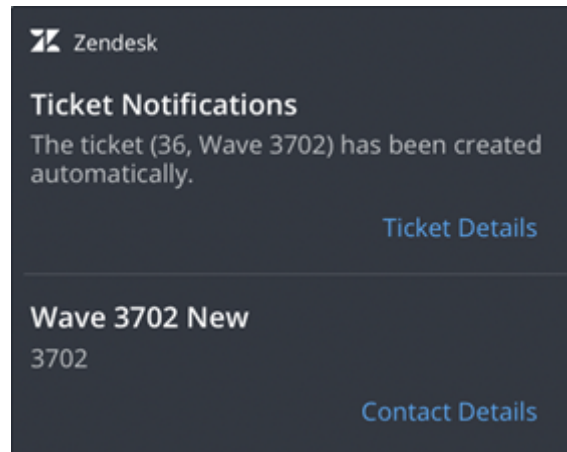
The user can modify the information above, and enter the parameters below.

Parameter need to be enclosed in brackets [].

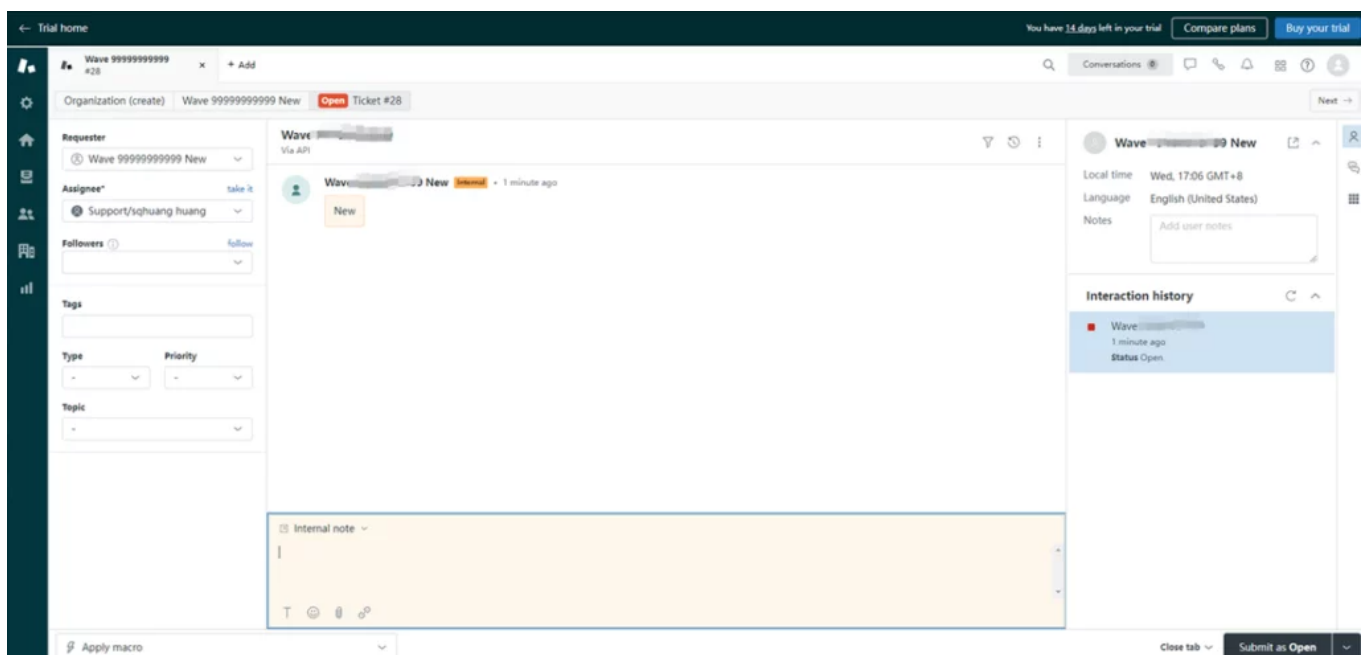
Parameter Name (Case Sensitive)	Description
[Number]	The number of the other party (including the caller number of the incoming call and the callee number of the outgoing call)
[Agent]	The extension number of the agent (i.e., 1000)

[AgentFirstName]	The first name of the agent. (i.e., John)
[AgentLastName]	The last name of the agent (i.e., Doe)
[AgentEmail]	The configured email of the agent (i.e., D.John@mycompany.com)

After the ticket has been created, a pop-up window will appear in the lower right corner of the computer desktop:



Zendesk Support Ticket Creation Notification



Zendesk Dashboard

If the user turns off auto-create new contact or the contact type is "account", the ticket creation will fail because the ticket cannot be associated with a contact.

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>

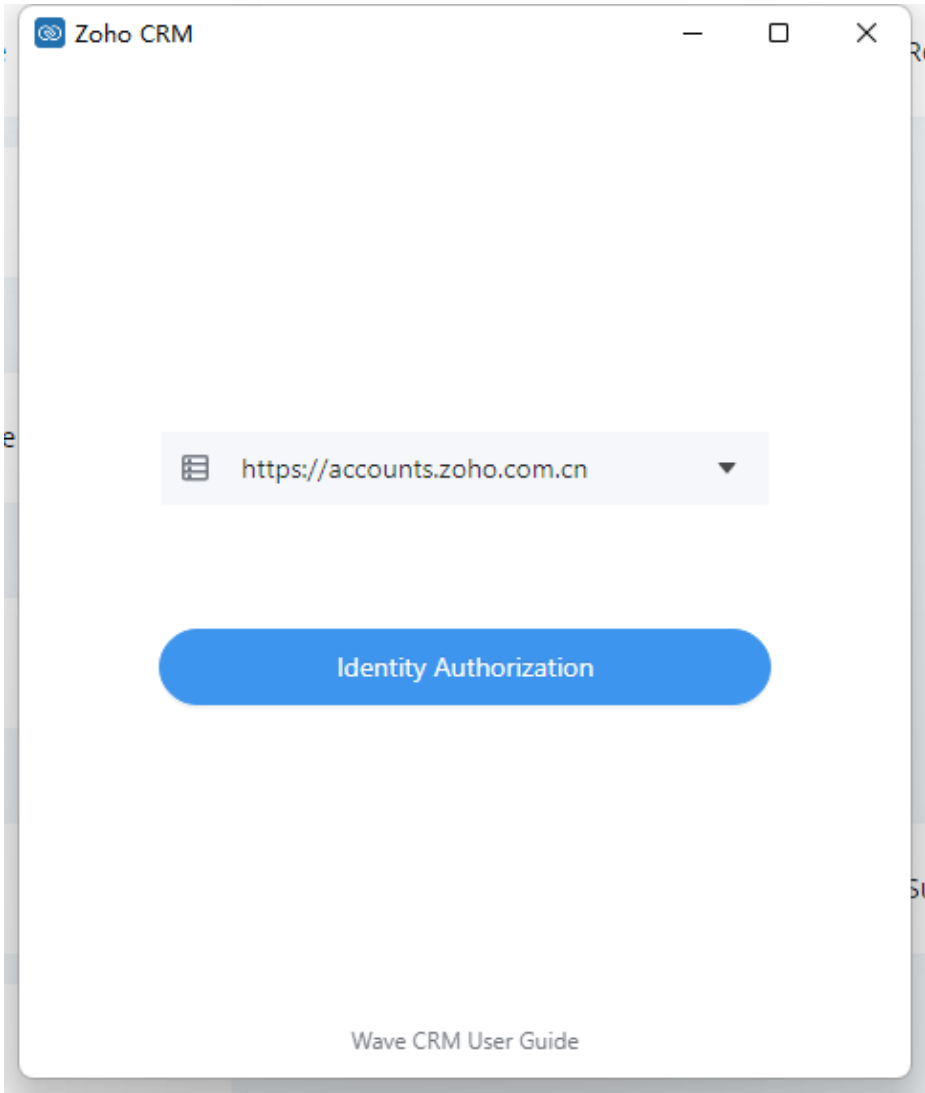
The servers in different regions are independent, but the functional flows are the same.

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.

Log Into Zoho CRM System through Wave App

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

CRM Server Address	US: https://accounts.zoho.com CN: https://accounts.zoho.com.cn (China regional server) EU: https://accounts.zoho.eu IN: https://accounts.zoho.in AU: https://accounts.zoho.com.au
--------------------	---

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.



TEST_NON

TEST_NON would like to access the following information.



- Full access to Read, Create, Update and Delete user data in your organization
- Full access to Read, Create, Update and Delete resources in a module
- Manage metadata

Accept

Reject

Zoho CRM System Identity Authorization I



TEST_NON

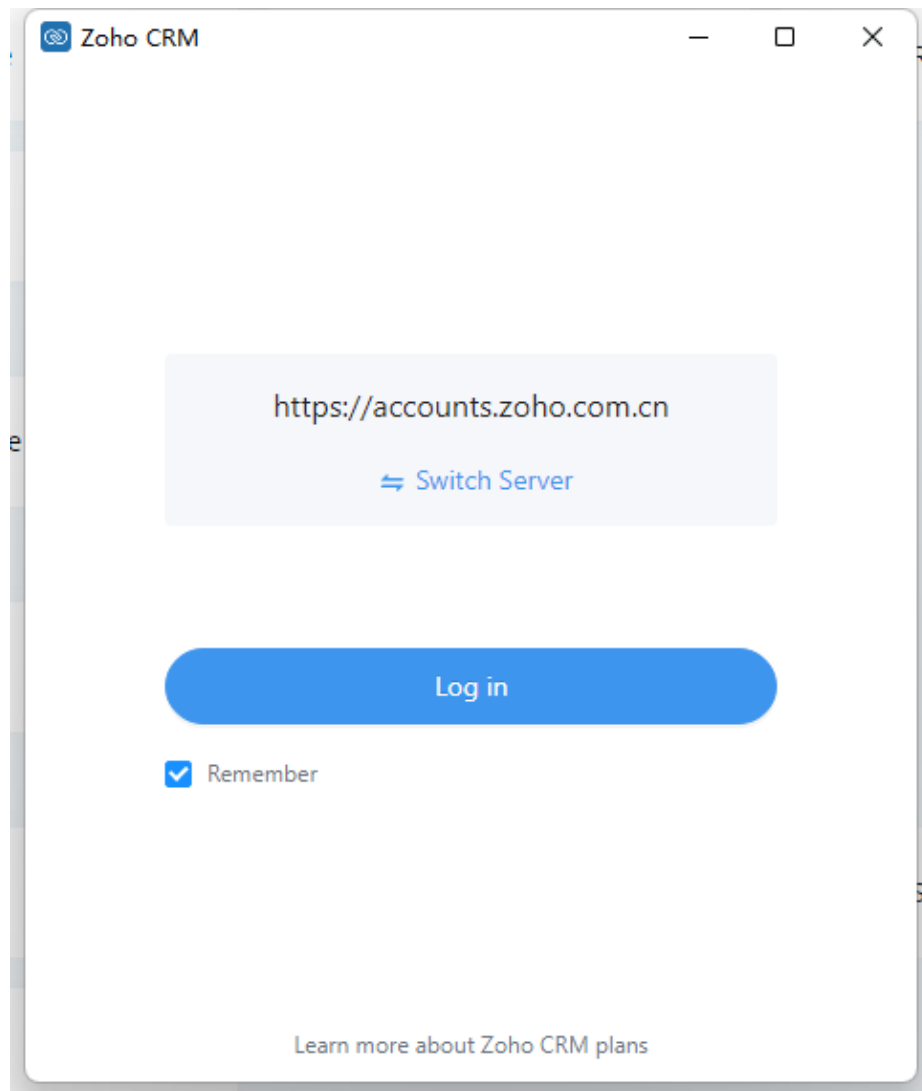
That worked!

The device has been approved. You can now start screening your data.

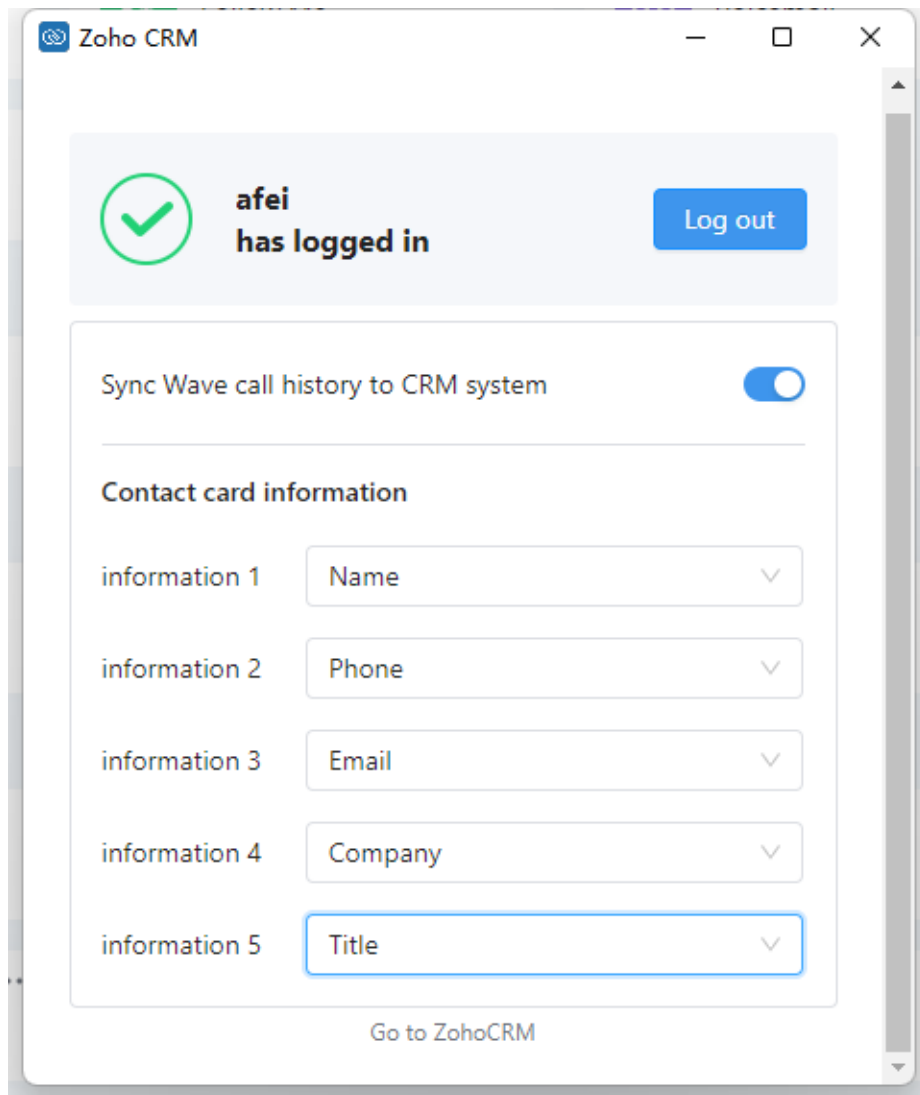
Zoho CRM System Identity Authorization II

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



Logged in Zoho CRM Successfully

- 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.
- Zoho CRM supports synchronizing call summary done by AI to the call notes on Zoho CRM platform.