Efficy

Available

> (i) Client Integration - VoIPcube client mandatory

Introduction

The end-user will get a pop-up on inbound calls. The pop-up provides deeplink to the CRM system
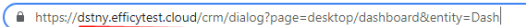
Configuration

To configure the Efficy integration we need 2 bits of information

- Domain of the efficy environment
- API key

Domain

Ask the customer for the domain they use to log into Efficy. This is visible in the URL bar
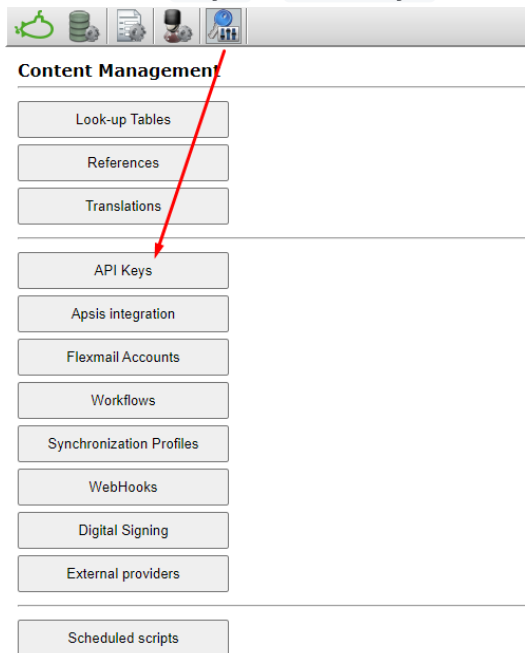

`https://dstny.efficytest.cloud/crm/dialog?page=desktop/dashboard&entity=Dash`

Strip the `https://` and `/crm`. In this example the domain would be `dstny.efficytest.cloud`.

API Key

The Efficy administrator needs to create and API Key for the integration. This can be done in the Efficy Designer `https://{Domain}/designer`
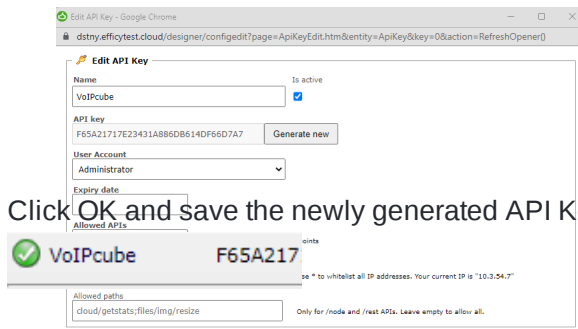
- CLick on the `keys` > `API keys`

- Click the + top-right
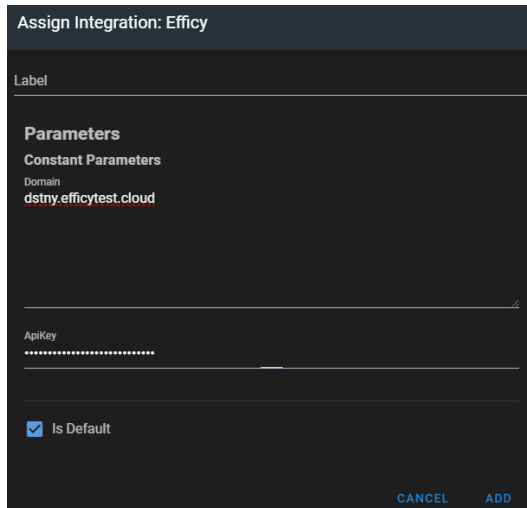

- Enter the following information

  - Name = `VoIPcube`

  - User Account = Account of choosing by customer (minimal rights = contact read + search)

  - Expiry date = Up to the customer. (Have the customer set a reminder on the expiry date)

  - Allowed API's = *

  - Allowed API's = * or `18.192.184.52` if the customer wants to use whitelisting

  - Allowed Path = empty, so that every path is allowed

- Click OK and save the newly generated API Key

Assignment

- Assign the integration to the customer and enter the `Domain` and `API Key`

Example

On inbound calls the matches are shown in a Pop-up which has a deeplink to the CRM.