

### Installing Cloud CONTACTfile

1. Go to the webpage <http://contactfile.co.uk/instructions.php> and click the **Download** button.



**CONTACTfile** Home Cloud Desktop Add-Ons Support Testimonials Prices Contact

**CONTACTfile - instructions**

Read the **CONTACTfile** manual

- **CRM User notes:** all you need to know for the CRM system
- **Pro User notes:** the CRM user notes plus the manual for business tools
- **Helpdesk User notes:** the CRM user notes plus the manual for help desk
- **Document manager User notes:** the CRM user notes plus the manual for document manager

Connecting to **CONTACTfile** in the cloud

- **PC Install Guide.pdf:** how to connect to the cloud from a PC. You will need to download the CCF.exe file - see button (right).
- **MAC Install Guide.pdf:** how to connect to the cloud from a Mac
- **iPad/iPhone Install Guide.pdf:** how to connect to the cloud from an ipad or iphone
- **Android Install Guide.pdf:** how to connect to the cloud from an Android device

**DOWNLOAD**

2. Wait for the utility CCF.exe to download.



3. Run the CCF.exe file. If you can't find it, look in your Downloads folder.

4. Click **Run**.



5. Click **Next**.



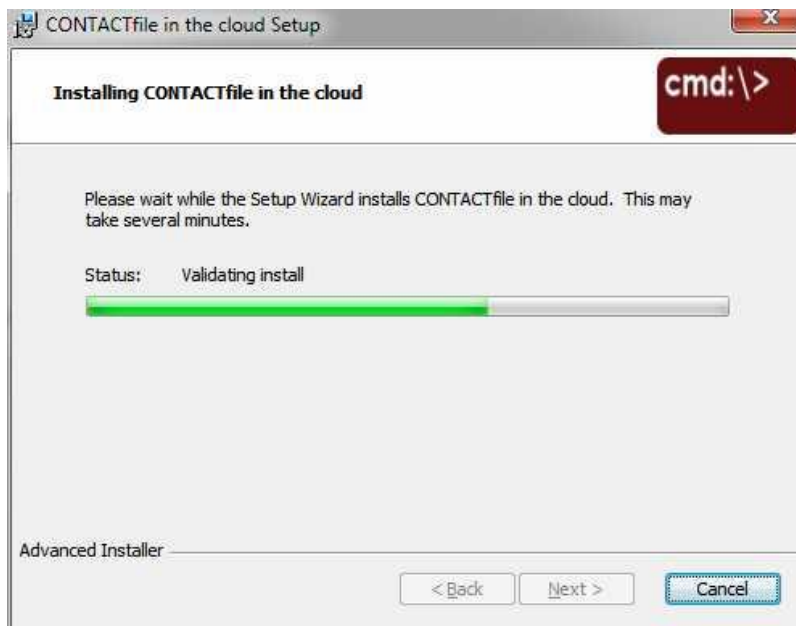
6. Accept the licence agreement, and click **Next**.



7. Click **Install** and confirm that it's OK for the installation to make changes to the computer.



8. Wait for the installation to complete.



9. Click **Finish**.

10. Have a look at the desktop, and find the new Cloud CONTACTfile shortcut.



## Running Cloud CONTACTfile for the first time

The first time you run the CONTACTfile Cloud program, there are a few extra steps to do, and you'll need to be a bit more patient whilst it gets going.

1. Double-click the new Cloud CONTACTfile icon on your desktop.
2. Tick the box which says to allow connection without asking you every time, and click **Connect**.
3. Tick the box which says to trust it (or something similar), and click **Yes**.



4. If the account show at the top is not your own User ID then click to 'use another account'.
5. Enter your UserID and password, and tick the box to 'Remember my credentials'.
6. Wait a while, and eventually the CONTACTfile logon will be presented to you.

Note that when you exit CONTACTfile, you will be automatically disconnected from the cloud.

## Running Cloud CONTACTfile subsequently

All you should need to do from now on is to double-click the Cloud CONTACTfile icon on your desktop, and the CONTACTfile logon will be presented to you. Easy!