Bitrix24 CRM Integration Guide

Yeastar P-Series Appliance Edition

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Contents

About This Guide

Yeastar P-Series PBX System supports to integrate with Bitrix24 CRM, which allows Bitrix24 users to get all the call details right in their CRM entries while keeping the voice traffic in Yeastar P-Series PBX System. This topic describes the requirements, key features, and terminologies related with the integration.

Requirements

Bitrix24

- **Version**: Use **Bitrix24 Cloud Edition** with any of the following plans subscribed:
    - Basic
    - Standard
    - Professional
    - Enterprise

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 37.21.0.66 or later.

Key features

The integration of Yeastar P-Series PBX System and Bitrix24 CRM provides the following key features:

Click to Call

Users can launch calls by a single click on the detected numbers from Bitrix24 CRM via Yeastar Linkus Web Client.

> **Note:**
> This feature requires users to install 'Yeastar Linkus for Google' Chrome extension and set up Linkus Web Client to work with the Chrome extension.

Call Popup

Automatically bring up the contact's profile on the web browser when users (with their Linkus Web Client or Linkus Desktop Client logged in) receive / answer an inbound call from a CRM contact, or finish a call with a CRM contact. In addition, users are able to manually open the contact's profile from the call window during a call with a CRM contact.

Call Journal

All the call activities get logged automatically to Bitrix24 CRM when a user ends calls with CRM contacts.

Call Recording Playback

CRM users can see and play recordings stored in the PBX from corresponding call log in CRM interface.

Contact Synchronization

Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from / or initiating outbound calls to Bitrix24 CRM contacts.

Lead or Contact Creation

A new lead or contact can be created automatically or manually in Bitrix24 CRM for unknown inbound calls or outbound calls.

Terminologies

The following table lists the terminologies of the Bitrix24 CRM integration.

Term	Description
Bitrix24 Main Administrator	The user who registered a Bitrix24 account.
Bitrix24 User	The user who is invited to Bitrix24.
PBX Extension	The extension number for Bitrix24 user. Bitrix24 users can register their extensions on a phone or on Linkus Clients, and use the extension to make and receive calls.
Bitrix24 Companies	A client, a supplier, or a partner with whom you have business dealings.
Bitrix24 Contact	An individual who has purchased your product or service, or a company representative responsible for purchasing.
Bitrix24 Lead	An individual who has the potential to become a customer for your product or services.

Related information

[Integrate Yeastar P-Series PBX System with Bitrix24 CRM]

Set up Bitrix24 CRM Integration

Integrate Yeastar P-Series PBX System with Bitrix24 CRM

This topic describes how to integrate Yeastar P-Series PBX System with Bitrix24 CRM via Bitrix24 REST API (webhook).

Requirements

Before you begin, make sure that your Bitrix24 and Yeastar P-Series PBX System meet the following requirements:

Bitrix24

- **Version**: Use **Bitrix24 Cloud Edition** with any of the following plans subscribed:
    - Basic
    - Standard
    - Professional
    - Enterprise
- **Account**: Use **Main Administrator account** for integration.

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 37.21.0.66 or later.
- **Network Capability**: Have access to the Internet.

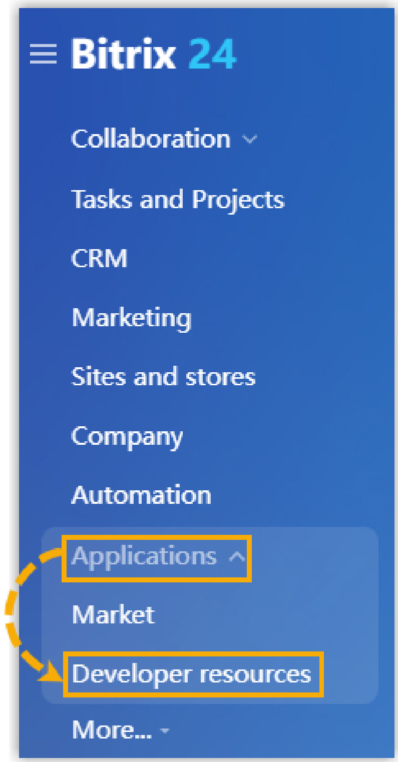
Procedure

- Step 1. Create an inbound webhook on Bitrix24
- Step 2. Connect Yeastar P-Series PBX System and Bitrix24 CRM
- Step 3. Associate Bitrix24 users with PBX extensions on Yeastar P-Series PBX System

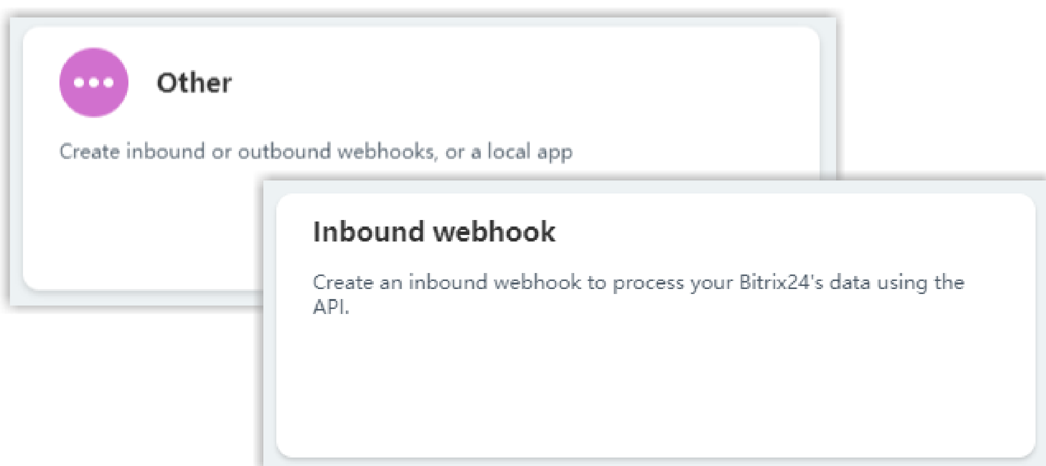
Step 1. Create an inbound webhook on Bitrix24

Create an inbound webhook on Bitrix24 to allow Yeastar P-Series PBX System to access your Bitrix24 via API.

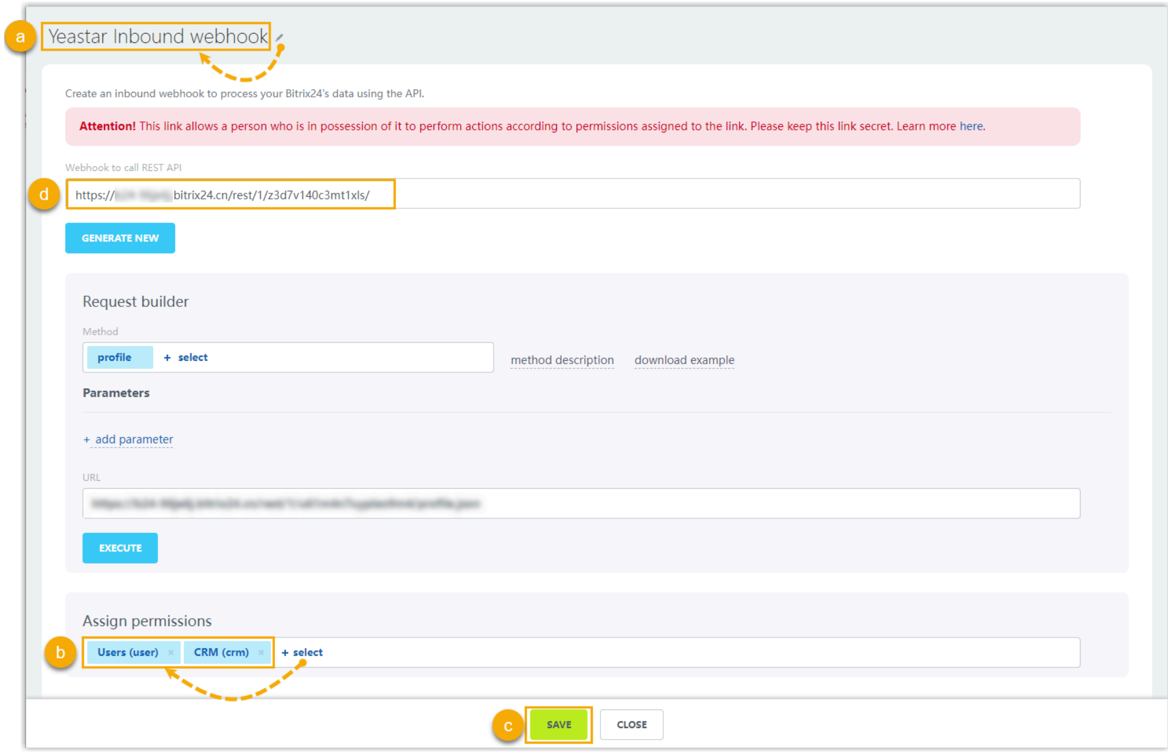
1. Log in to your Bitrix24 with Main Administrator account.
2. On the left navigation bar, click **Applications > Developer resources**.



3. Under **Common use cases** tab, click **Other**, then click **Inbound webhook**.



4. On the configuration page, create an inbound webhook as follows:



a. Click to edit the inbound webhook name. In this example, enter `Yeastar Inbound webhook`.

b. In the **Assign permissions** section, click **+ select**, then select **Users (user)** and **CRM (crm)**.

c. Click **Save**.

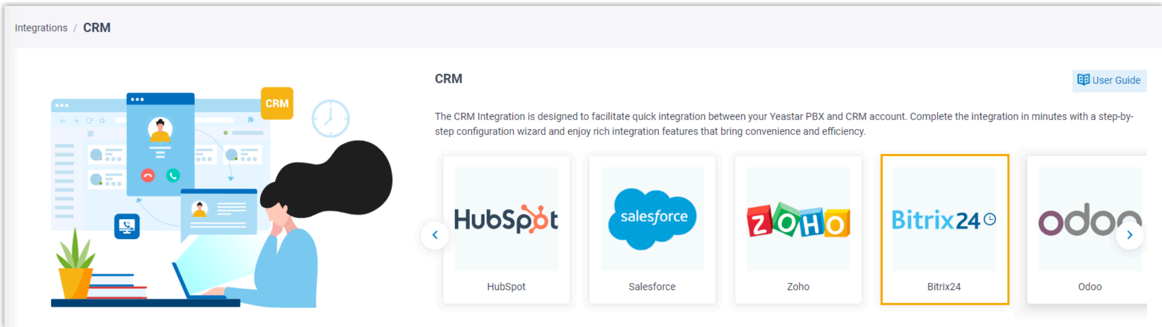
d. Copy the URL in the **Webhook to call REST API** field, which will be used on Yeastar PBX for the integration.

> **Tip:**
> In future use, if you want to update the webhook, you can proceed on **Applications > Developer resources > Integrations**.

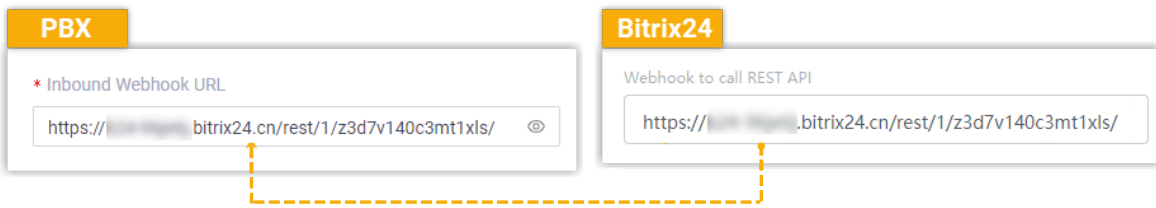
Step 2. Connect Yeastar P-Series PBX System and Bitrix24 CRM

On Yeastar P-Series PBX System, enter the domain name and inbound webhook URL obtained from Bitrix24 to connect to the CRM.

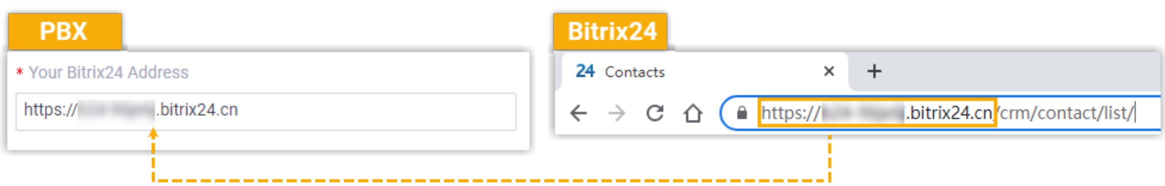
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. Click **Bitrix24**.



3. In the **Inbound Webhook URL** field, enter [the URL](#) that you have obtained from Bitrix24.

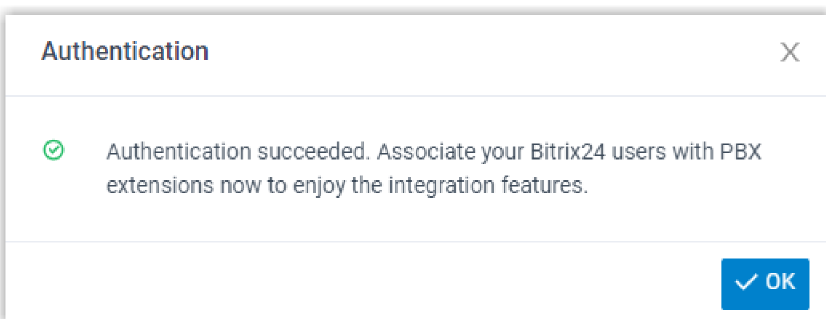


4. In the **Your Bitrix24 Address** field, enter the domain name of your Bitrix24.



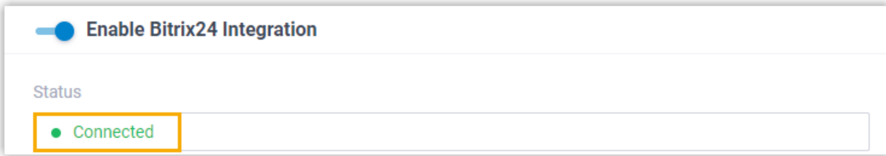
5. Click **Save**.

   If the authentication succeeds, a pop-up window will be shown as below.



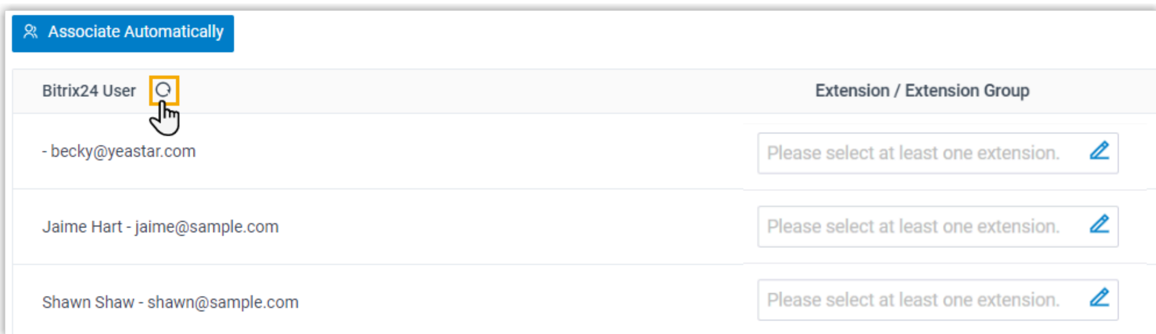
6. Click **OK** to confirm.

   The **Status** field displays **Connected**, indicating that Yeastar P-Series PBX System is connected to Bitrix24 CRM successfully.



Step 3. Associate Bitrix24 users with PBX extensions on Yeastar P-Series PBX System

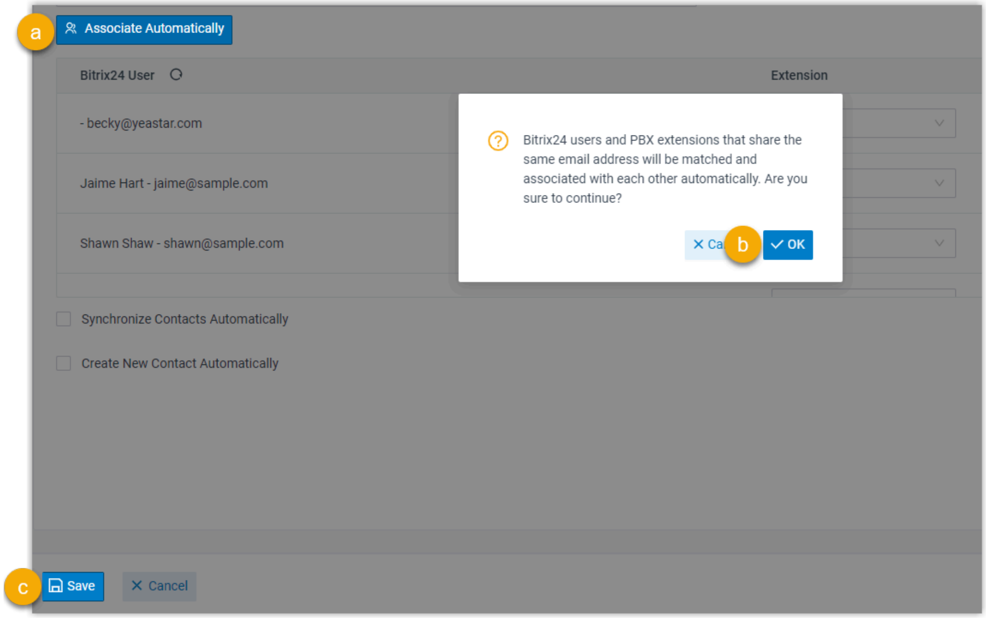
1. On the CRM integration page of PBX, click beside **Bitrix24 User** to obtain the latest list of Bitrix24 users.



2. Associate Bitrix24 users with PBX extensions.

Associate automatically

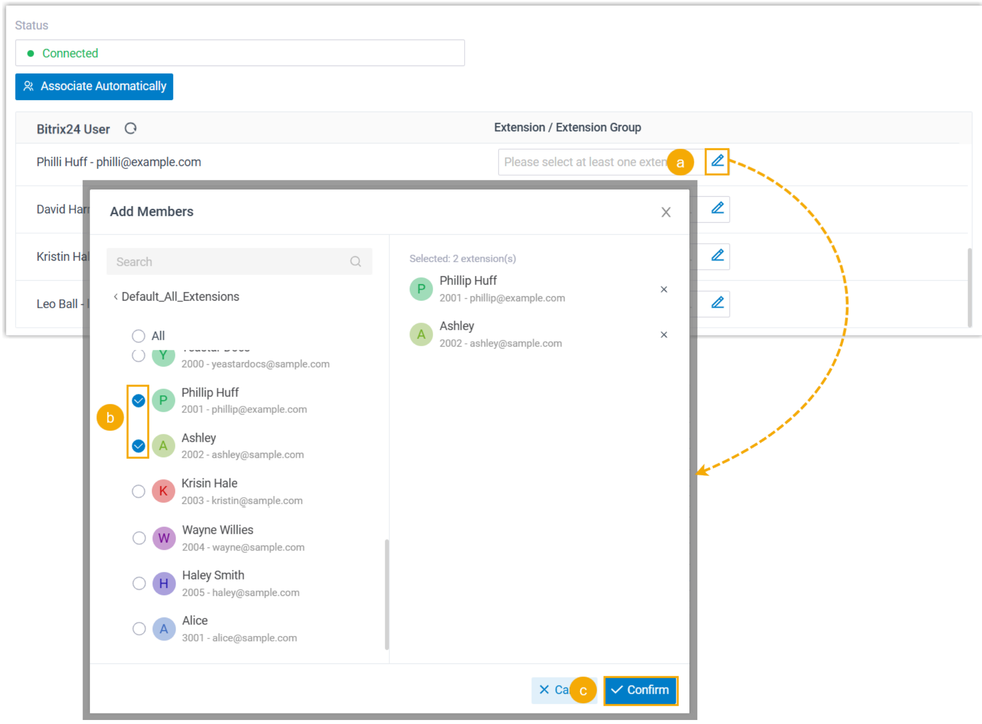
If users bind the same email address to their Bitrix24 accounts and PBX extensions, you can implement automatic association of their Bitrix24 accounts and PBX extensions as follows:



a. Click **Associate Automatically**.
b. In the pop-up window, click **OK**.
c. Click **Save**.

Associate manually

If users bind different email addresses to their Bitrix24 accounts and PBX extensions, you need to manually associate these users' Bitrix24 accounts and PBX extensions as follows.



a. In the **Extension / Extension Group** field beside the Bitrix24 user, click .
b. In the pop-up window, select the desired user's extension(s).
c. Click **Confirm**.
d. Click **Save**.

Result

- The integration of Yeastar P-Series PBX System and Bitrix24 CRM is set up.
- The associated Bitrix24 users can make or receive calls with their PBX extensions.

What to do next

- Set up Contact Synchronization from Bitrix24 CRM
- Set up Lead or Contact Creation for Bitrix24 CRM
- Set up Call Popup
- Use Bitrix24 CRM Integration

Set up Contact Synchronization from Bitrix24 CRM

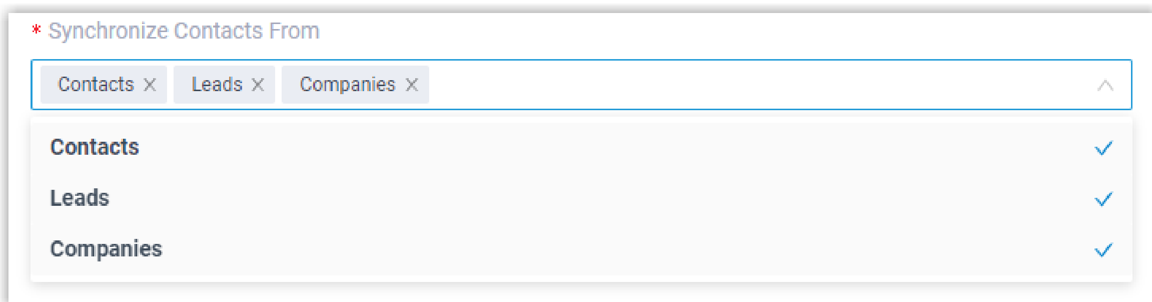
After integrating Yeastar P-Series PBX System with Bitrix24 CRM, you can enable a one-way contact synchronization to synchronize the Bitrix24 CRM contacts to a specific PBX phonebook.

Prerequisites

You have integrated Yeastar P-Series PBX System with Bitrix24 CRM.

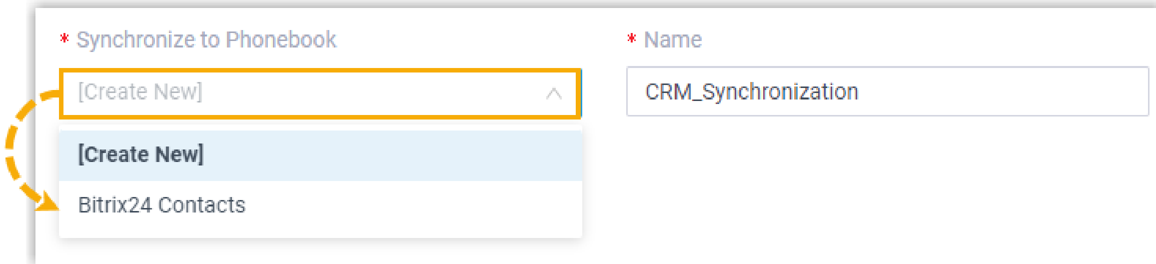
Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Synchronize Contacts Automatically**.
3. In the **Synchronize Contacts From** drop-down list, select the type(s) of contacts to be synchronized from Bitrix24 CRM.

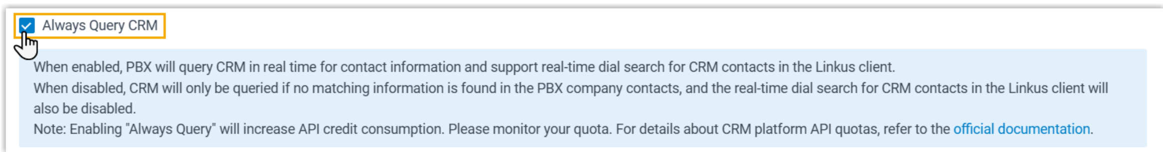
   

   - **Contacts**: An individual who has purchased your product or service, or a company representative responsible for purchasing.
   - **Leads**: An individual who has the potential to become a customer for your product or services.
   - **Companies**: A client, a supplier, or a partner with whom you have business dealings.
4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from Bitrix24 CRM.

> **Note:**
> The contacts can only be synchronized to an empty phonebook.



5. On the **Always Query CRM** option, decide whether to search contacts in the CRM real-time.



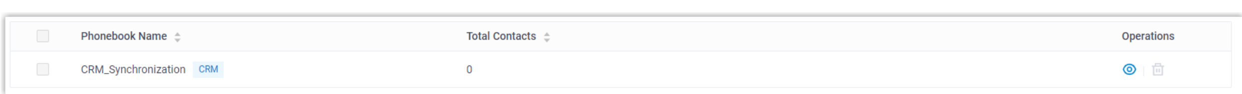
- If enabled, PBX will query CRM in real time for contact information, and support real-time dial search for CRM contacts in the Linkus clients of the associated extension users.
- If disabled, PBX will only query CRM when there is no matching information found in the PBX company contacts.

> **Note:**
> - Enabling this feature will increase API usage, so make sure to monitor your quota accordingly.
> - The real-time search is not supported when masked number is enabled.

6. Click **Save**.

Result

On **Contacts > Phonebooks**, the associated phonebook comes with a label CRM.



When the associated extensions receive an inbound call from a Bitrix24 CRM contact of specified type, or place an outbound call to the contact, PBX will search for the contact's information, and automatically synchronize the matched contact's information from the CRM to the associated phonebook in Yeastar P-Series PBX System.

Note:
This is a one-way sync from Bitrix24 CRM to Yeastar P-Series PBX System, therefore the associated phonebook and the synced contacts are read-only.

Troubleshooting:
Fail to synchronize certain CRM contacts?
Incomplete information of CRM contacts can lead to synchronization failure. Make sure the following fields are filled in for the contacts, then perform the directory synchronization again:

- Either the **First name** or **Last name** field is filled in.
- At least one phone number-related field is filled in.

Set up Lead or Contact Creation for Bitrix24 CRM

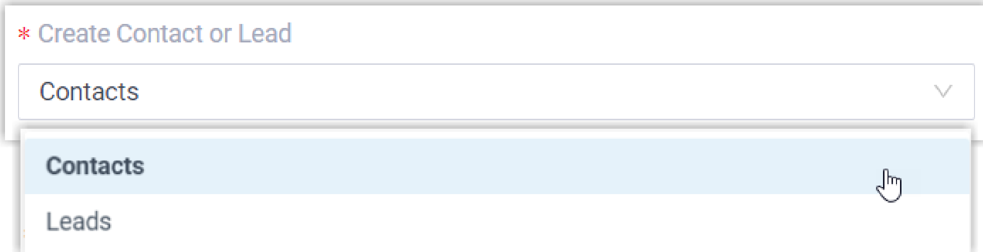
After integrating Yeastar P-Series PBX System with Bitrix24 CRM, you can enable automatic or manual lead or contact creation. This feature helps Bitrix24 CRM users build their contacts database, ensuring that all leads and contacts are captured when unknown calls are received or placed by the CRM users.

Prerequisites

You have integrated Yeastar P-Series PBX System with Bitrix24 CRM.

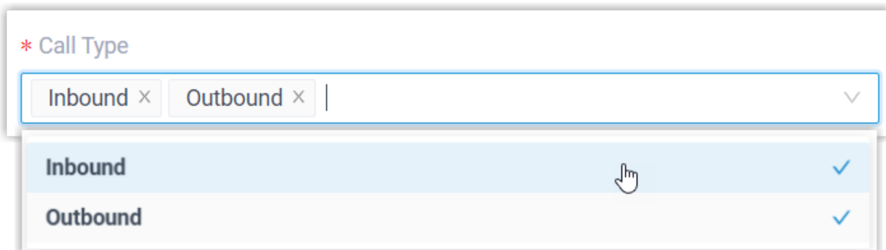
Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Create New Contact**.
3. In **Create Contact or Lead** drop-down list, select the type(s) of contacts to be created.



- **Contacts**: Save the unknown number as a Contact.
- **Leads**: Save the unknown number as a Lead.

4. In the **Create Method** section, select the desired creation method according to your needs.
    - If you want the system to automatically create contacts in the CRM based on specified types of calls, do as follows:
        a. Select **Automatically**.
        b. In the **Call Type** drop-down list, select when will a contact be automatically created in the CRM.

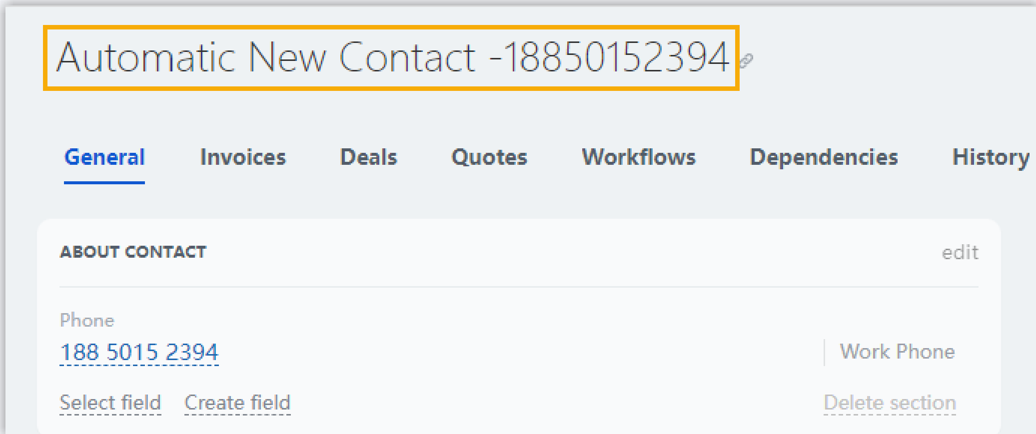
        

            - **Inbound**: Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
            - **Outbound**: Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
    - If you want to allow associated extension users to manually create contacts in the CRM during a call, select **Manually**.
5. Click **Save**.

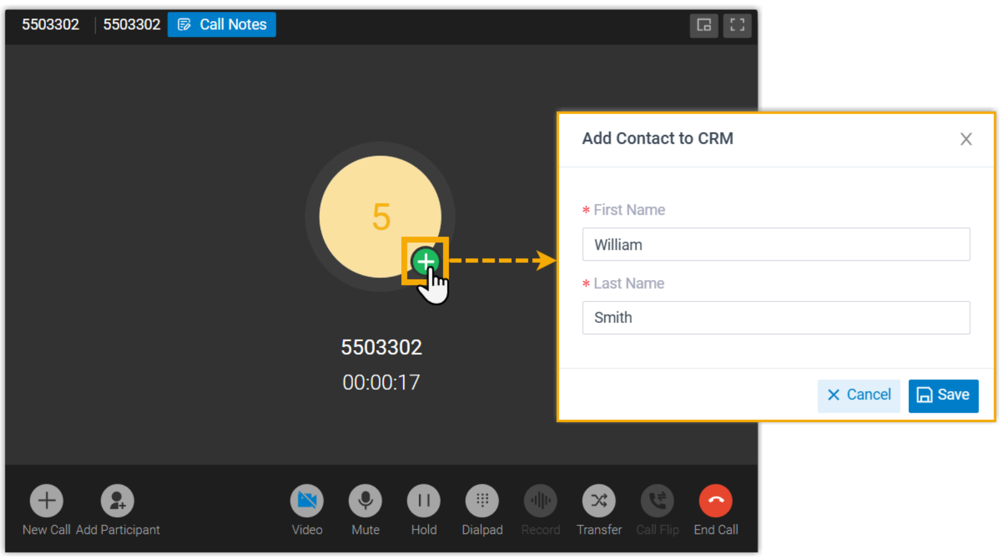
Result

- If automatic creation is configured, when the associated extensions call or receive calls from an unknown number, a new lead or contact will be created in Bitrix24 CRM.

> **Note:**
> The name of an auto-created lead or contact has a prefix of `Automatic New Contact` followed by the number.



- If manual creation is configured, the associated extension users can manually add an unknown number as a new contact or lead on the CRM.



Note:
If the Contact Synchronization feature is enabled, the newly created lead or contact will also be automatically synchronized to the phonebook in Yeastar P-Series PBX System.

Set up Call Popup

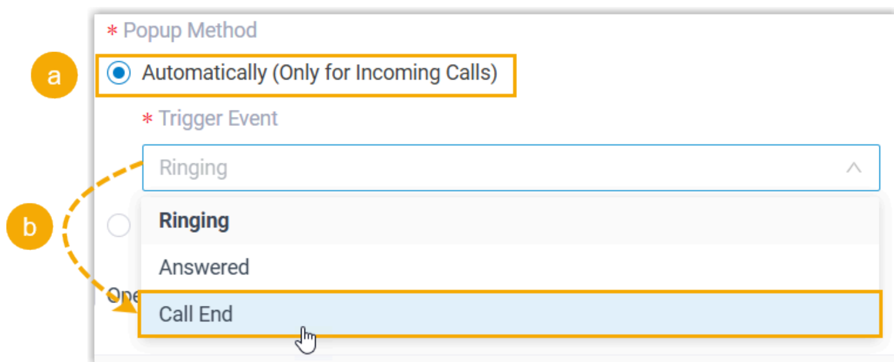
After the integration with Bitrix24 CRM, a web browser tab displaying CRM contact's information will be automatically launched when a CRM user receives an inbound call from a CRM contact by default. You can configure the call popup to be automatically triggered by a specified call event, or be manually opened during a call.

Prerequisites

You have integrated Yeastar P-Series PBX System with Bitrix24 CRM.

Procedure

1. Log in to PBX web portal, go to **Extension and Trunk > Extension**.
2. Click to edit the extension associated with a CRM user.
3. In the **Linkus Clients** tab, scroll down to your desired Linkus client, then select the checkbox of **Open Contact URL Using System-Integrated CRM**.
4. In the **Popup Method** section, decide the method of call popup.
    - If you want the system to automatically open the CRM contact details page, do as follows:



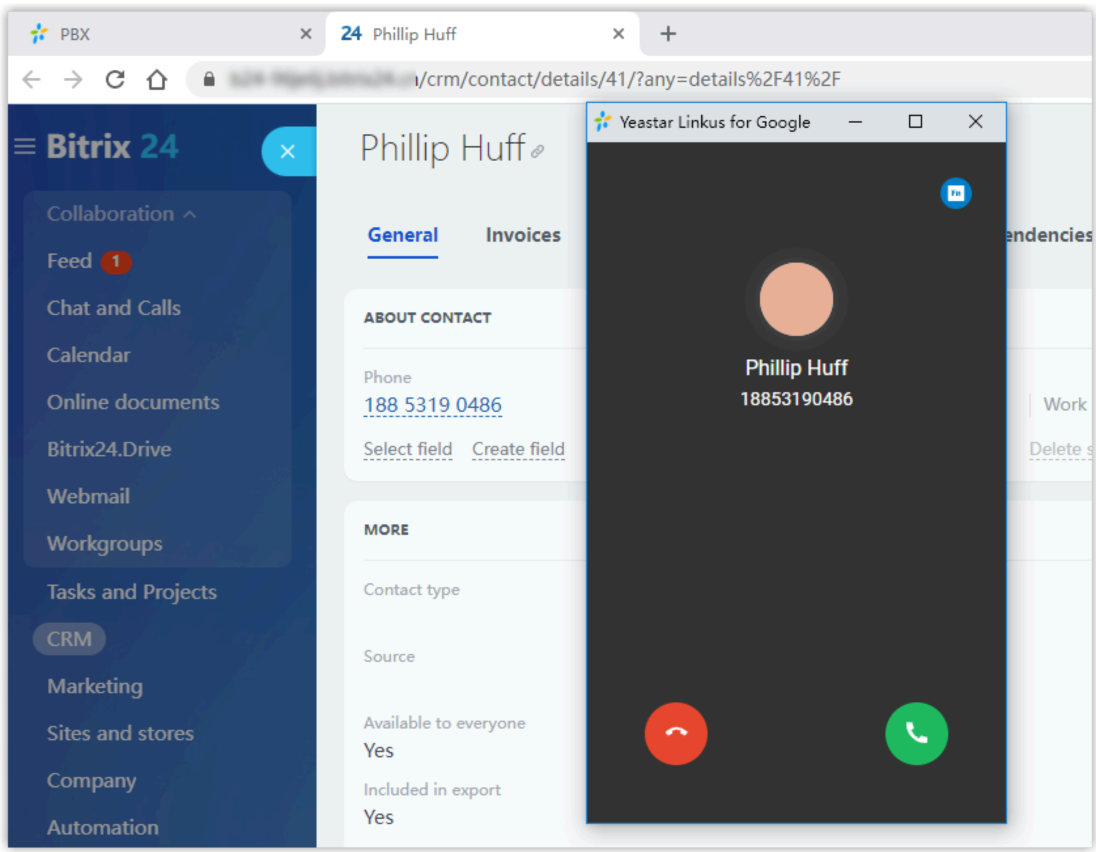
        a. Select **Automatically (Only for Incoming Calls)**.
        b. In the **Trigger Event** drop-down list, set when the call popup will be automatically triggered.
            - **Ringing**: A call popup will be triggered when a user receives an inbound call from a CRM contact.
            - **Answered**: A call popup will be triggered when a user answers an inbound call from a CRM contact.
            - **Call End**: A call popup will be triggered when a user finishes a call with a CRM contact.

- If you want the associated extension user to manually open the contact's URL during a call with a CRM contact, select **Manually**.

5. Click **Save**.

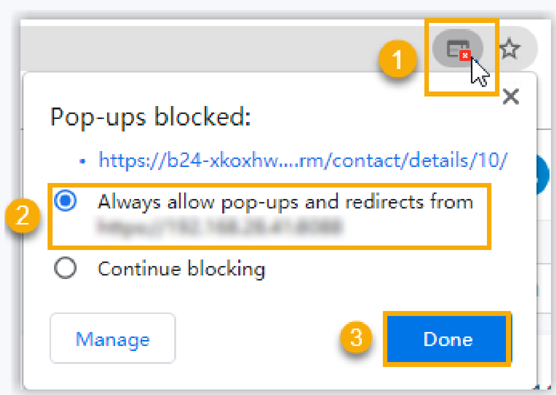
Result

- If automatic call popup is configured, when the specified trigger event occurs on an inbound call from a CRM contact, a new browser tab will be launched to show the contact's information from the CRM.



- If manual call popup is configured, the associated extension users can click the `CRM` label on the call window to manually open the contact's details page during a call with the CRM contact.

Note:
The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**.



Set up Call Journal to Bitrix24 CRM

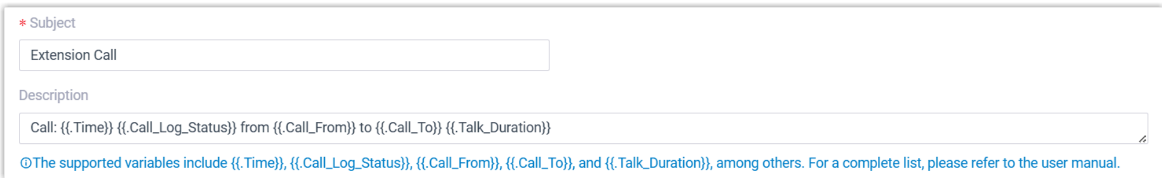
After the integration, you can set up call journal to automatically log all the call activities to Bitrix24 CRM when an associated user ends calls with CRM contacts.

Prerequisites

You have integrated Yeastar P-Series PBX System with Bitrix24 CRM.

Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Call Journal**.
3. Configure the following call log information according to your needs.



- **Subject**: The subject of the call log.
- **Description**: The description of the call log.

> **Note:**
> The contents can be composed of variables. For the supported variables, see XML Descriptions for Integration Template - Call Journal Scenario Variables.

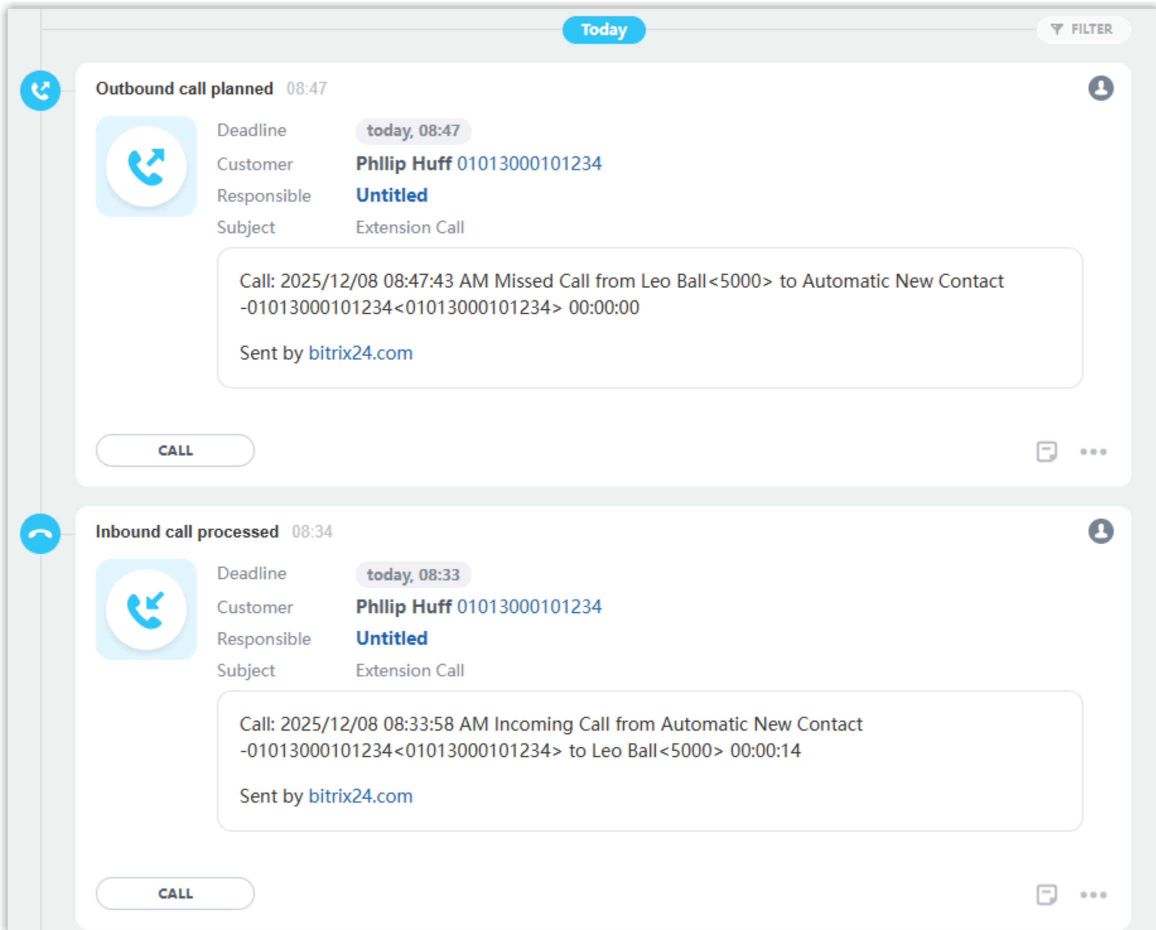
4. Configure the following call journaling settings according to your needs.

Setting	Description
Play Call Recording	If enabled, the CRM users who associated with extensions on PBX can directly view and play call recordings stored on the PBX within the CRM system. **Note:** When users click to play call recording in the CRM, the system will request recording file from the PBX. For details on how the CRM platform protects the privacy of recording data, please contact CRM provider.
Disable Display Missed Call Records in Unanswered Agents	If enabled, for queue and ring group calls, the PBX will only synchronize the call logs to the CRM of the agent who answers the call, while missed call logs for the same call are not synchronized to the CRM of agents who did not answer.

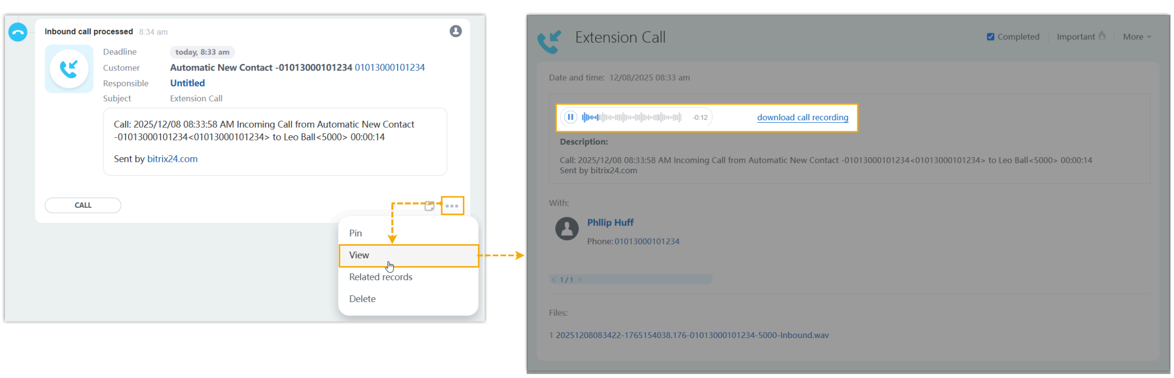
5. Click **Save**.

Result

- When the associated users ends a call with a CRM contact, the PBX will automatically synchronize the call log to CRM with the pre-defined subject and description.



- If you have enabled call recording playback feature, users can view and play call recordings within the CRM.



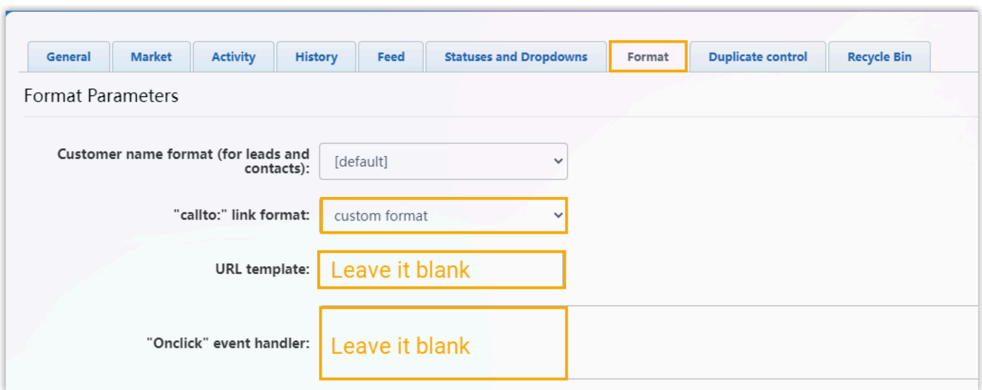
Use Bitrix24 CRM Integration

This topic shows the usage of the key features that can be achieved after integrating Yeastar P-Series PBX System with Bitrix24 CRM.

Click to Call

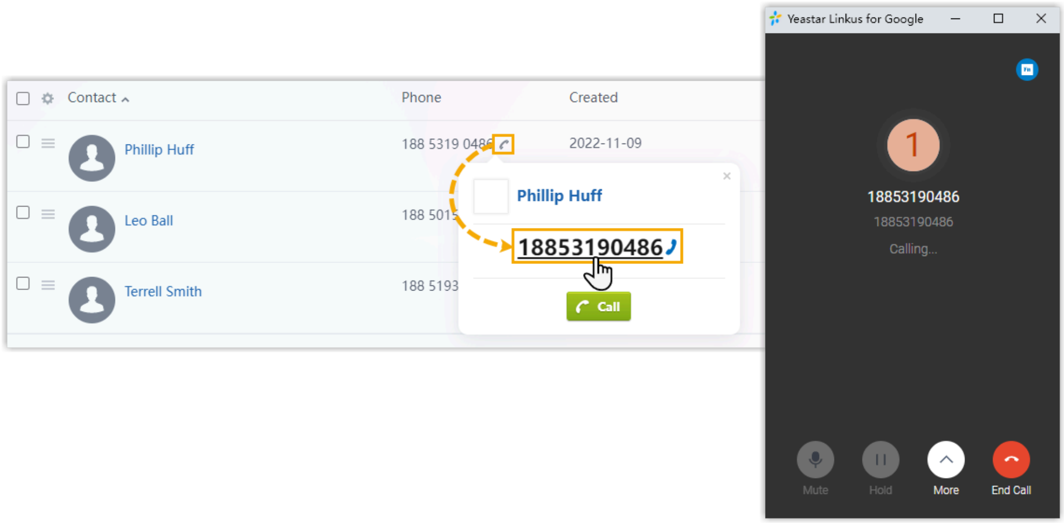
Prerequisites

- Install 'Yeastar Linkus for Google' Chrome extension and set up Linkus Web Client to work with the Chrome extension.
- Disable calls to be routed via Bitrix24 Telephony (Path: **CRM > Settings > CRM Settings > Other > Other Settings > Format**).



Procedure

Users click to display the detected phone number on Bitrix24 CRM, then click the phone number, a call will be sent out directly via the associated PBX extension.



Call Popup

Prerequisites

Keep at least one of the following clients logged in:

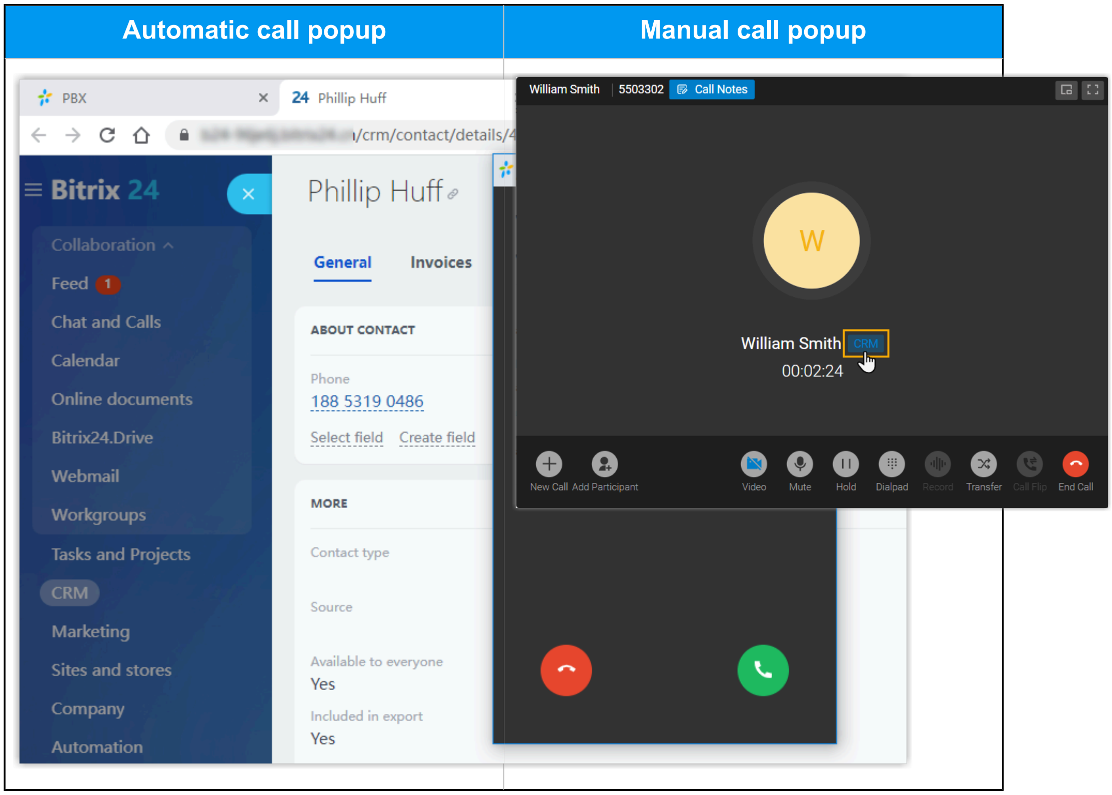
- Linkus Desktop Client
- Linkus Web Client

> **Note:**
> If users close web browser or Linkus Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension 'Yeastar Linkus for Google', which allows for the call popup browser tab even when web browser is closed.

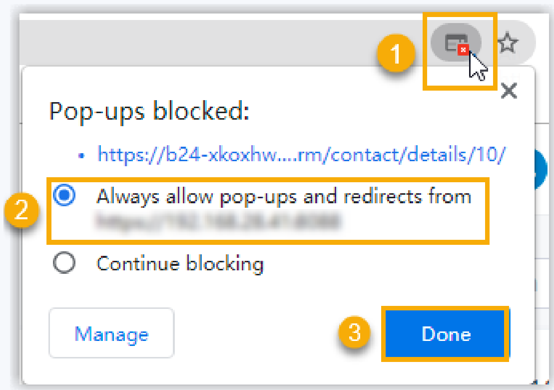
Procedure

When Bitrix24 CRM users receive / answer an inbound call from a CRM contact, or finish a call with a CRM contact, a new browser tab will automatically be launched to show the CRM contact's information. Additionally, users can manually open the contact's information from the call window during the call.

> **Note:**
> For more information about the settings, see Set up Call Popup.



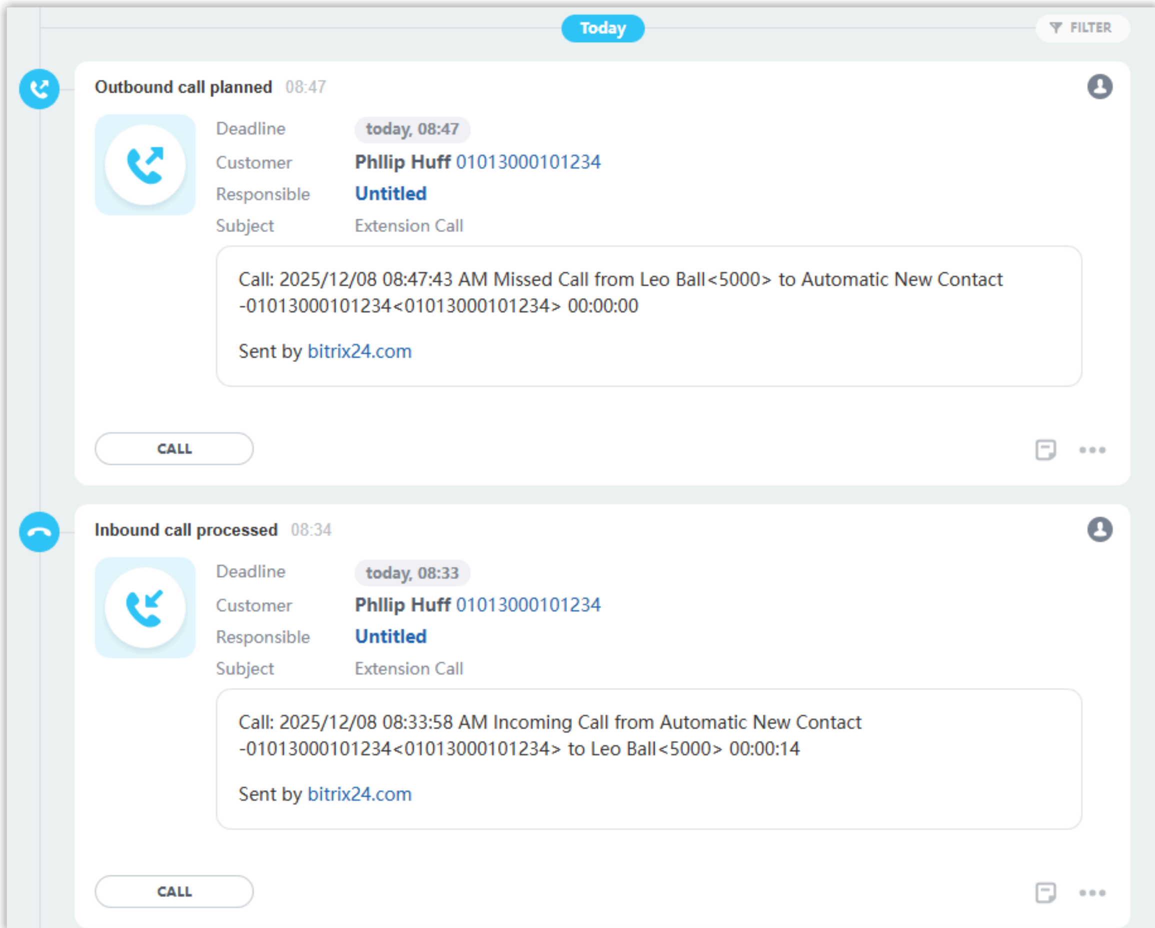
Note:
The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



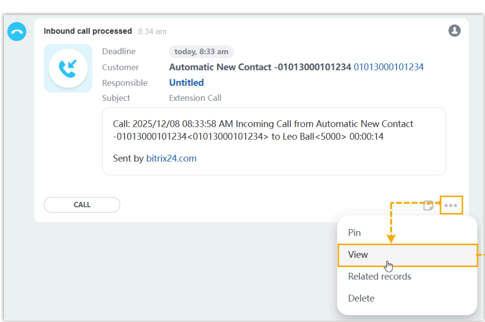
Call Journal

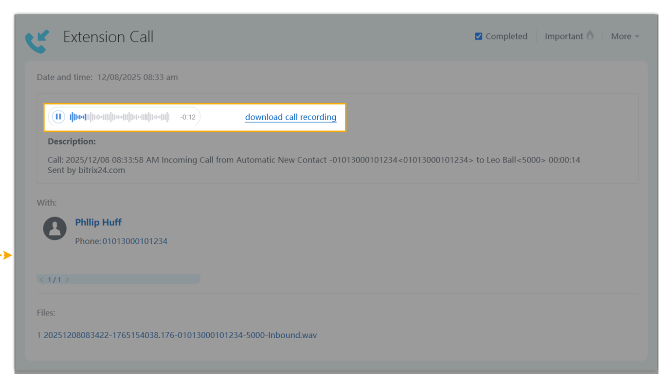
All outbound calls, inbound calls, and missed call records will be logged to CRM automatically, which helps users to keep track of every conversation.

- Users can log in to Bitrix24, go to **CRM > Leads** or **CRM > Customers > Contacts/Companies** in a contact detail page to view the call logs.



- If you have enabled the call recording playback feature, users can view and play call recordings within the CRM.

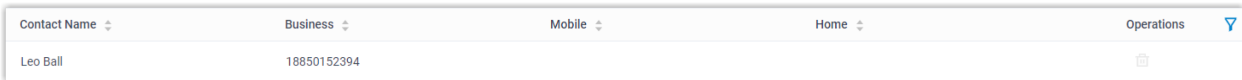




Contact Synchronization

Either inbound calls from Salesforce contacts or outbound calls to the contacts will trigger a CRM contact lookup. If there exists the same number in Bitrix24 CRM, the matched Bitrix24 CRM contact will be synchronized to the associated PBX phonebook, and the synchronized contact is read-only.

For more information, see Set up Contact Synchronization from Bitrix24 CRM.

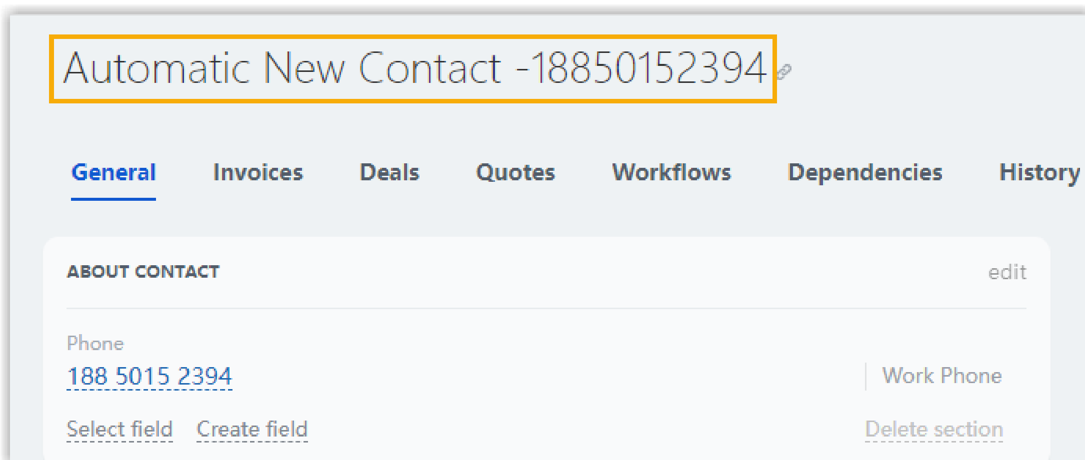


Contact Name	Business	Mobile	Home	Operations
Leo Ball	18850152394			

Lead or Contact Creation

A new lead or contact can be created automatically or manually in Bitrix24 CRM when the associated extensions call or receive calls from an unknown number.

For more information, see Set up Lead or Contact Creation for Bitrix24 CRM.

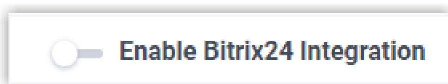


Disable Bitrix24 CRM Integration

You can disable the Bitrix24 CRM integration on Yeastar P-Series PBX System at any time when you want to pause the CRM integration.

Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the top of the Bitrix24 integration page, turn off the switch.

3. Click **Save**.

Result

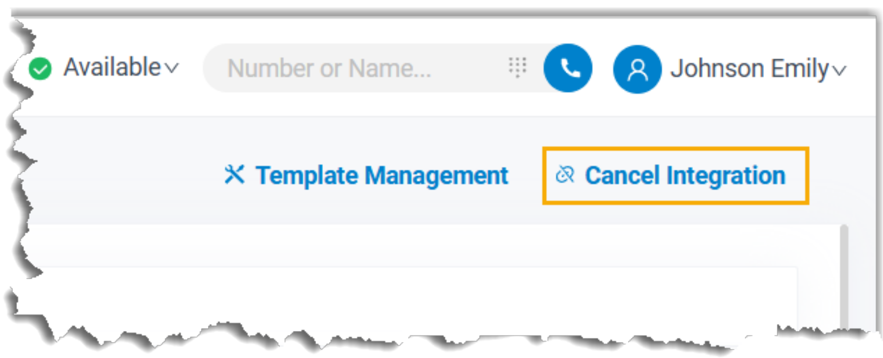
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

Disconnect Bitrix24 CRM Integration

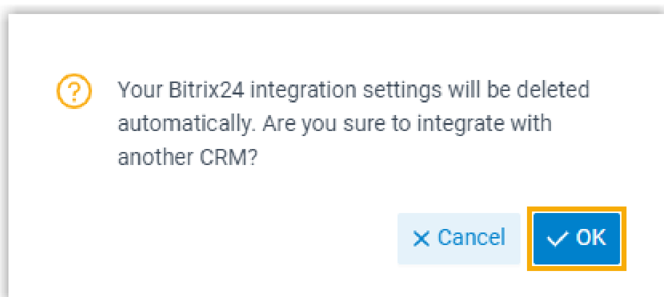
When you want to integrate with another CRM account, you need to disconnect the current CRM integration first.

Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. At the top-right corner, click **Cancel Integration**.



3. In the pop-up window, click **OK**.



Result

- The Bitrix24 CRM integration is disconnected.
- All the CRM integration settings are cleared.
- The synchronized phonebook and contacts are retained on the PBX and can be edited now.