

Bitrix24 CRM Integration Guide

Yeastar P-Series Appliance Edition

Version: 1.0

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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 37.9.0.18 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 an inbound call from a CRM contact.

Call Journal

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

Contact Synchronization

Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from Bitrix24 CRM contacts.

Automatic Lead or Contact Creation

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

Terminologies

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

Table 1.

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 Contact Synchronization from Bitrix24 CRM](#)

[Set up Automatic Lead or Contact Creation for Bitrix24 CRM](#)

[Use Bitrix24 CRM Integration](#)

[Disable Bitrix24 CRM Integration](#)

[Disconnect Bitrix24 CRM Integration](#)

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 37.9.0.18 or later.
- **Network Capability:** Have access to the Internet.

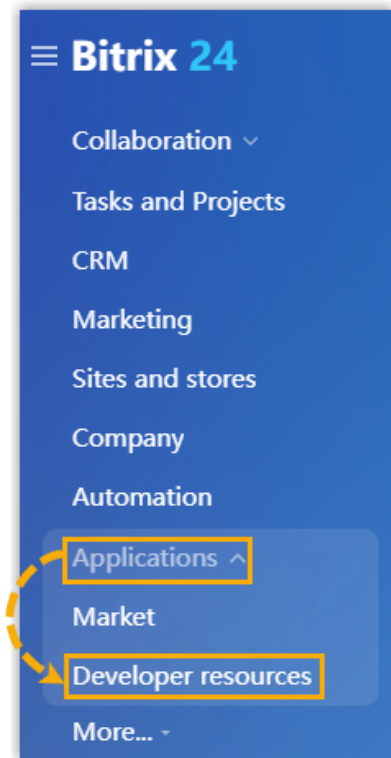
Procedure

- [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](#)

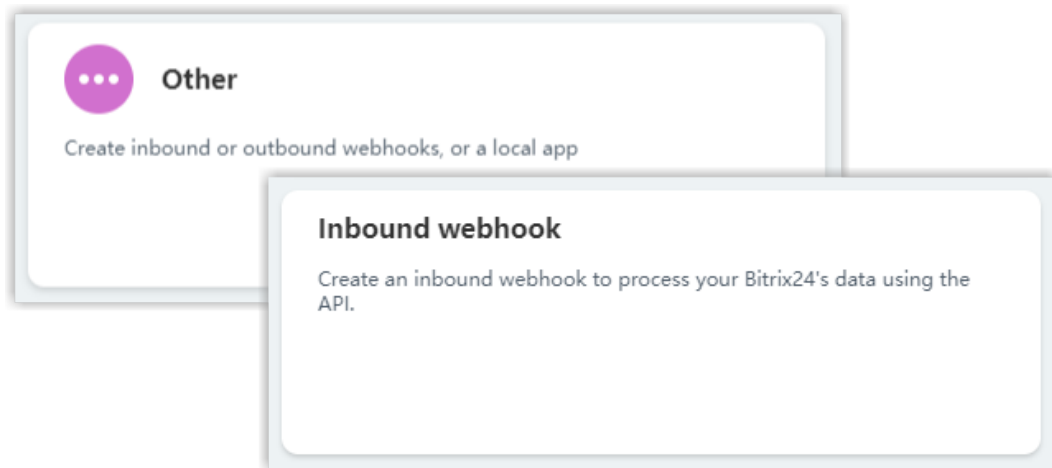
Step 1. Create an inbound webhook on Bitrix24

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.



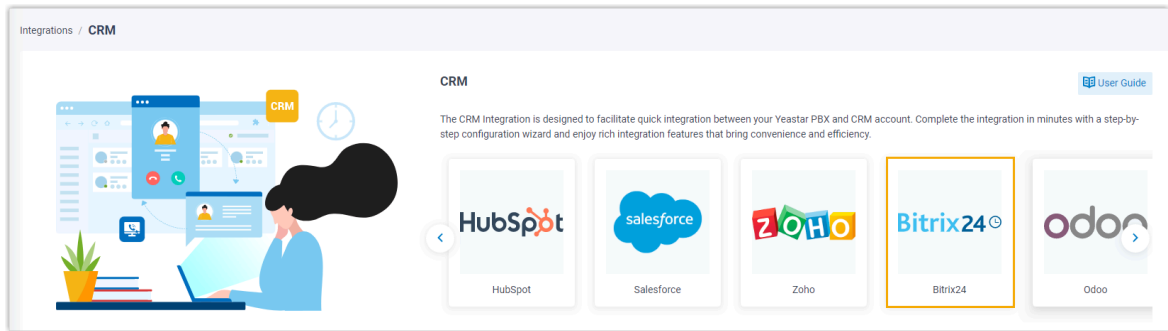
Tip:

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

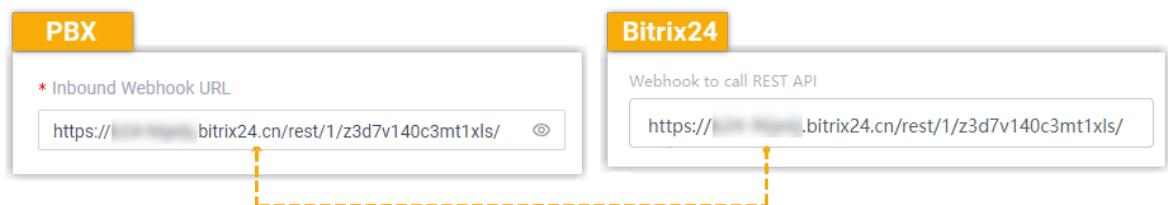
Step 2. Connect Yeastar P-Series PBX System and Bitrix24 CRM

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

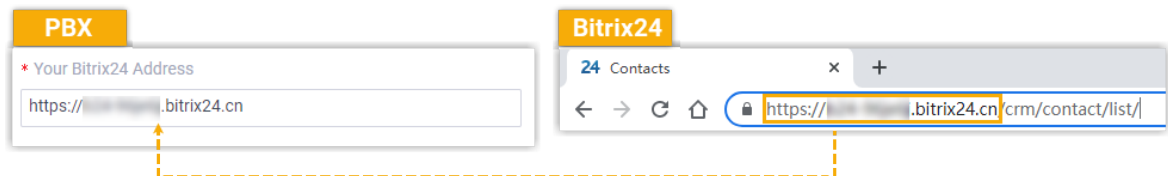
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. Click **Bitrix24**.



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

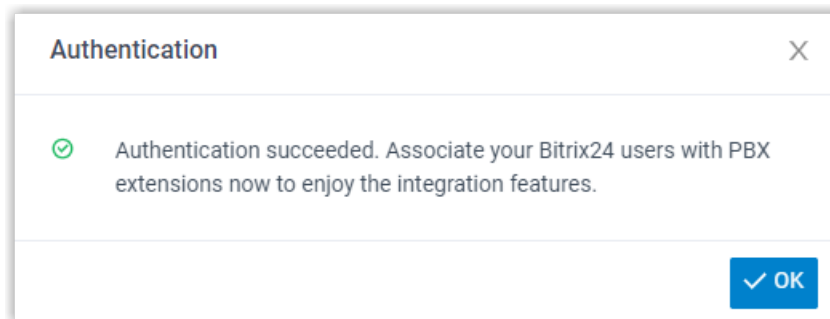


4. In the **Your Bitrix24 Address** field, enter the domain name of your Bitrix24.



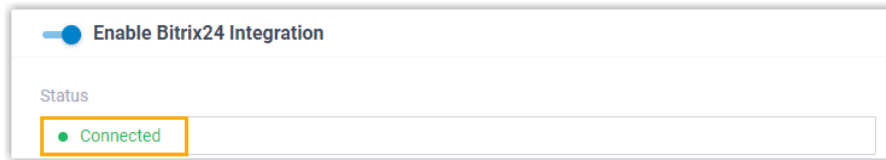
5. Click **Save**.

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




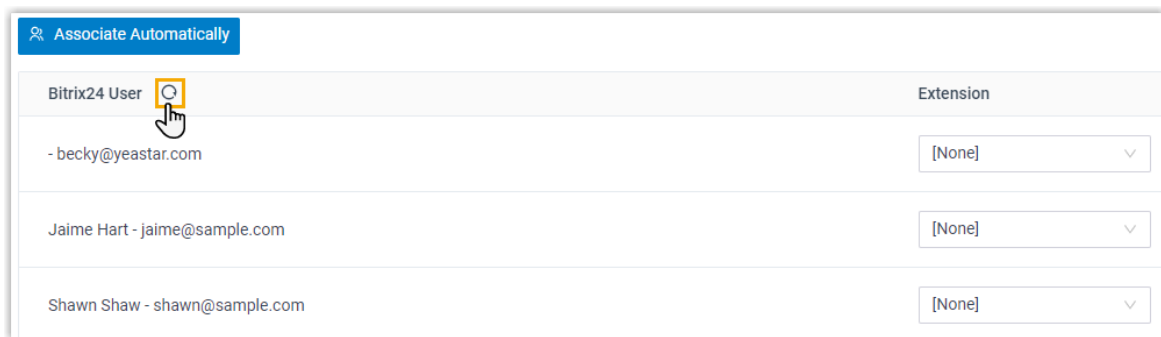
6. Click **OK** to confirm.

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

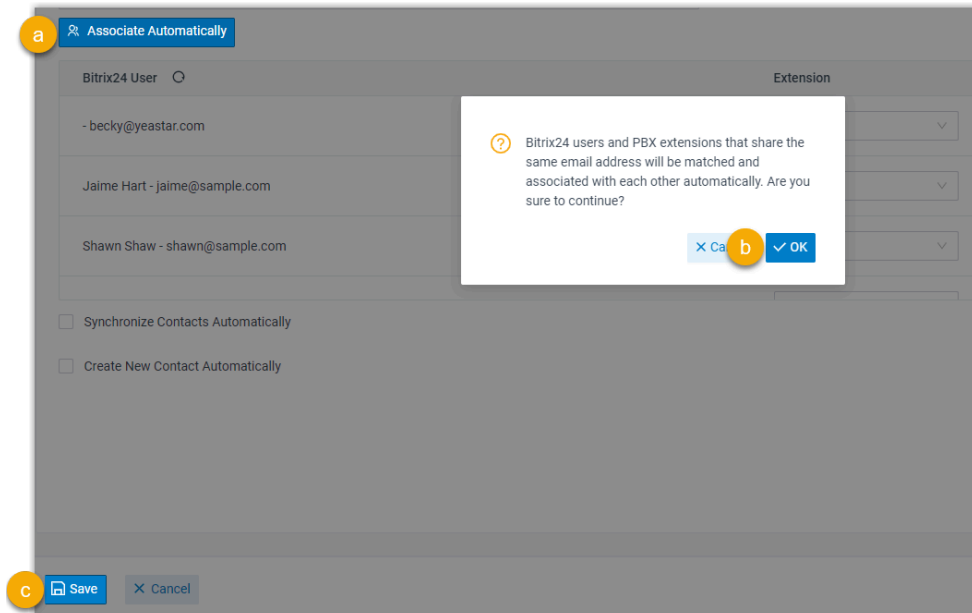
1. On the CRM integration page of PBX, click  beside **Bitrix24 User** to obtain the latest list of Bitrix24 users.



2. Associate Bitrix24 users with PBX extensions.

Associate automatically

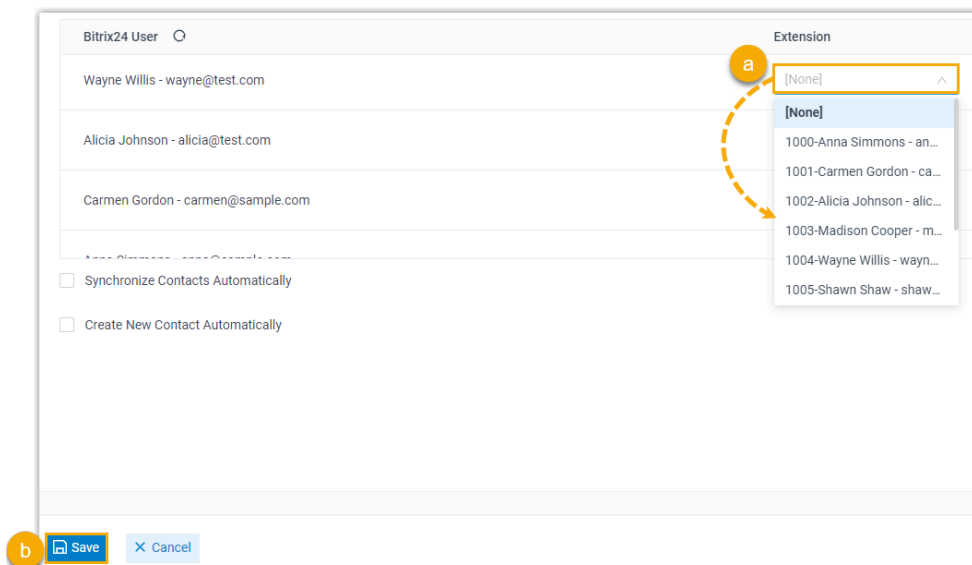
If users bind the same email address to their Bitrix24 accounts and PBX extensions, you can implement automatic association of their Bitrix24 accounts and PBX extensions as follows:



- 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** drop-down list beside desired Bitrix24 user, select the user's PBX extension.
- b. 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 Automatic Lead or Contact Creation for Bitrix24 CRM](#)
- [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 phone-book.

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, select the checkbox of **Synchronize Contacts Automatically**.
3. In the **Synchronize Contacts From** drop-down list, select the type(s) of contacts to be synchronized from Bitrix24 CRM.

* Synchronize Contacts From

Contacts X Leads X Companies X ^

Contacts	✓
Leads	✓
Companies	✓

- **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.

* Synchronize to Phonebook

[Create New] ^

[Create New]

Bitrix24 Contacts

* Name

CRM_Synchronization

5. Click **Save**.

Result

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

<input type="checkbox"/>	Phonebook Name	Total Contacts	Operations
<input type="checkbox"/>	CRM_Synchronization CRM	0	

When the associated extensions receive an inbound call from a Bitrix24 CRM contact of [specified type](#), the contact information will be synchronized to the associated phonebook in Yeastar P-Series PBX System automatically.

**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 Automatic Lead or Contact Creation for Bitrix24 CRM

After integrating Yeastar P-Series PBX System with Bitrix24 CRM, you can enable automatic 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.

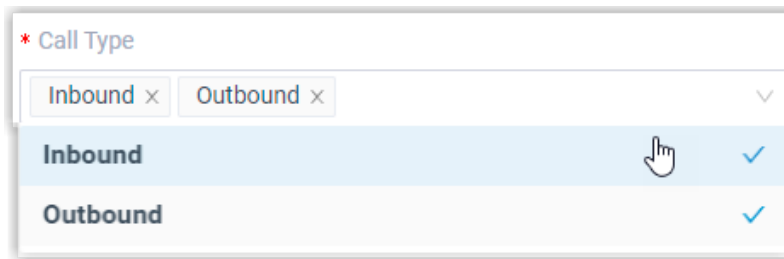
Prerequisites

You have [integrated Yeastar P-Series PBX System with Bitrix24 CRM](#).

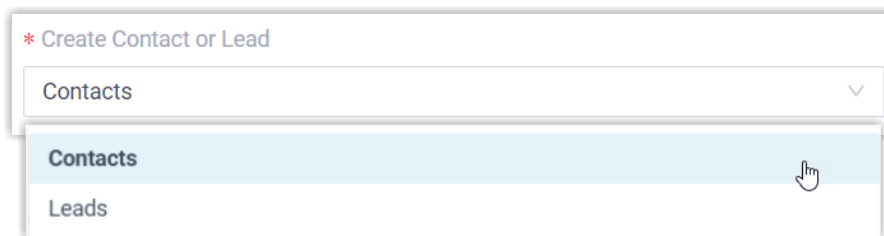
Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, select the checkbox of **Create New Contact Automatically**.

3. In the **Call Type** drop-down list, select when will a lead or a contact be automatically created on Bitrix24 CRM.



- **Inbound:** Inbound call from an unknown number that doesn't match a Contact, Lead, or Companies already in the CRM.
 - **Outbound:** Outbound call to an unknown number that doesn't match a Contact, Lead, or Companies already in the CRM.
4. In the **Create Contact or Lead** drop-down list, select the type of contacts to be created.



- **Contacts:** Save the unknown number as a [Contact](#).
 - **Leads:** Save the unknown number as a [Lead](#).
5. Click **Save**.

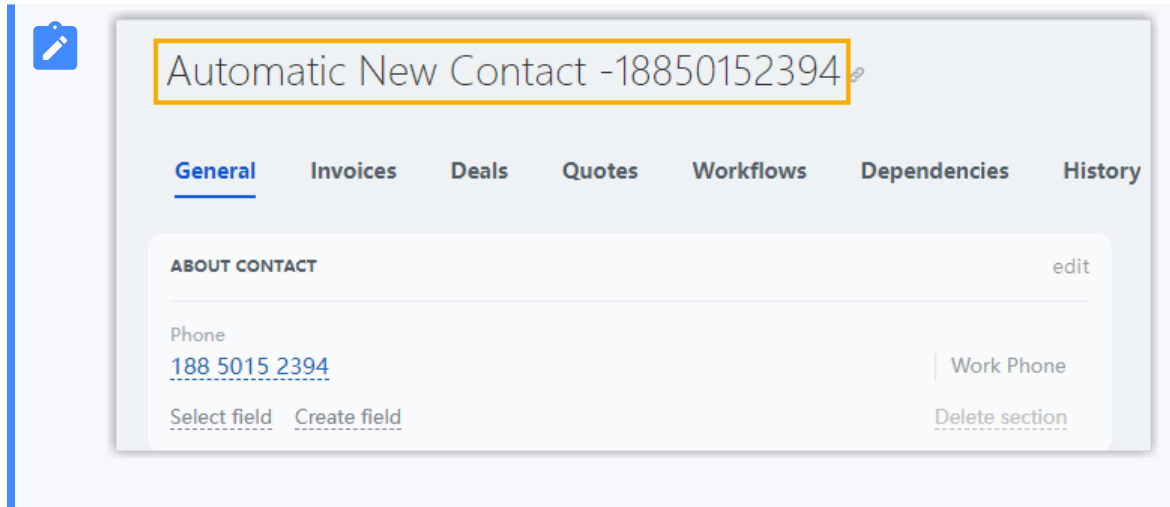
Result

- 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.



Automatic New Contact -18850152394


General Invoices Deals Quotes Workflows Dependencies History

ABOUT CONTACT [edit](#)

Phone
188 5015 2394

[Select field](#) [Create field](#) [Work Phone](#) [Delete section](#)

- 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.

Contact Name ▾	Business ▾	Mobile ▾	Home ▾	Operations
Automatic New Contact -18850152394	18850152394			

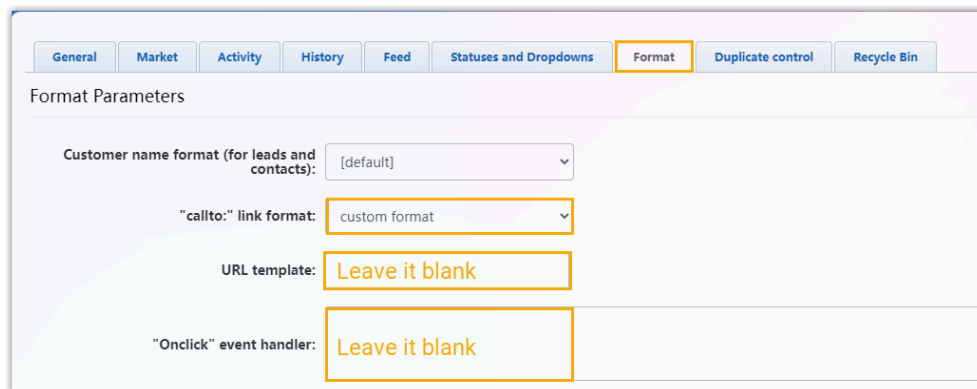
Use Bitrix24 CRM Integration

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**).

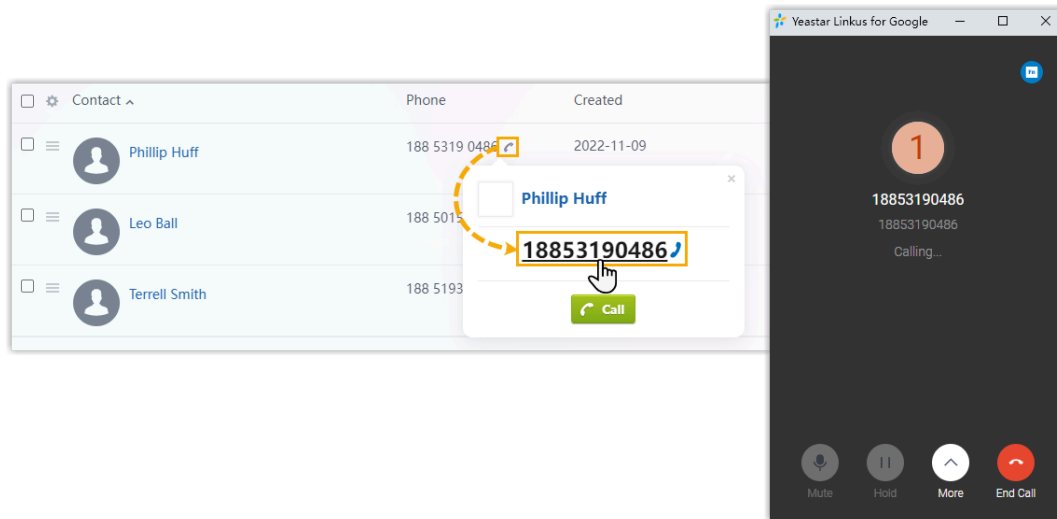


The screenshot shows the 'Format' tab in the Bitrix24 CRM settings. The 'Format Parameters' section contains four settings:

- Customer name format (for leads and contacts): [default] (dropdown menu)
- "callto:" link format: custom format (dropdown menu)
- URL template: Leave it blank (text input)
- "Onclick" event handler: Leave it blank (text input)

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

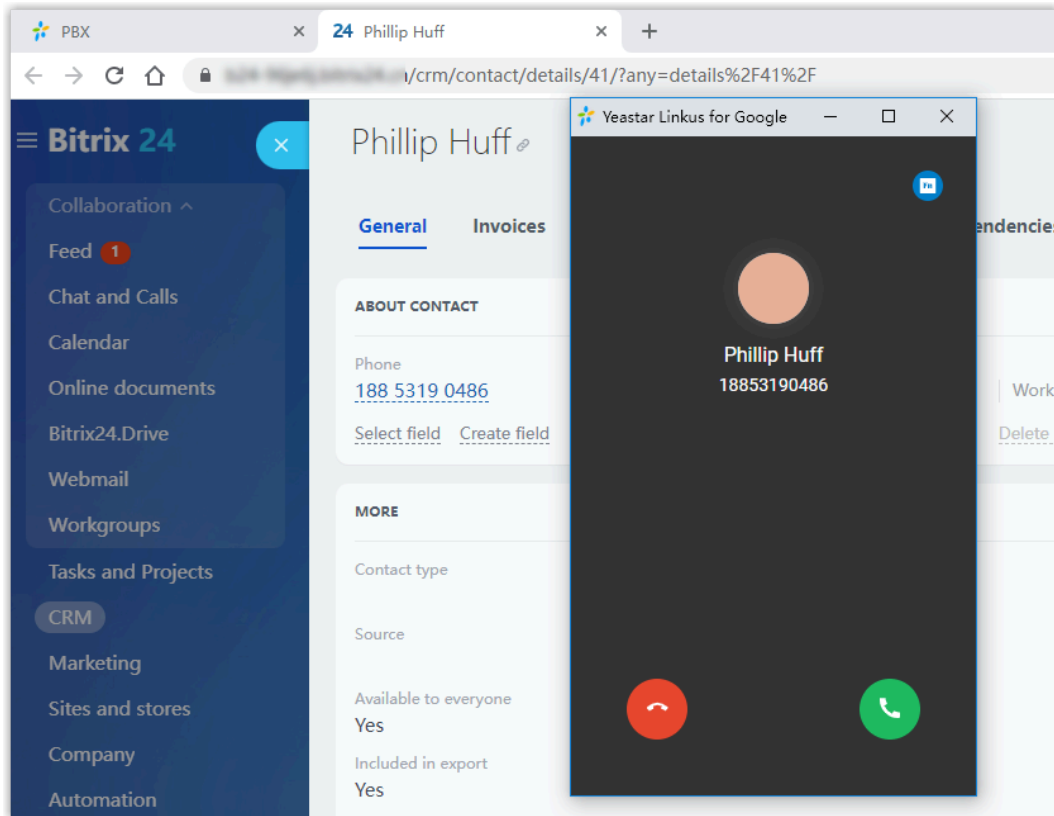


Note:

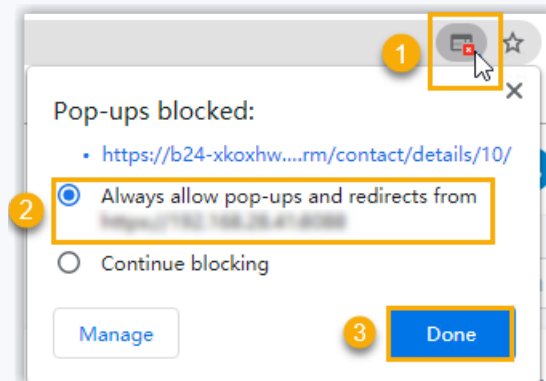
If users close web browser or Linkus Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension '[Yeastar Linkus for Google](#)', which allows for the call pop-up browser tab even when web browser is closed.

Procedure

When the extension associated with a Bitrix24 user receives an inbound call from CRM contacts, a new browser tab will be launched to show the CRM contact's information.

**Note:**

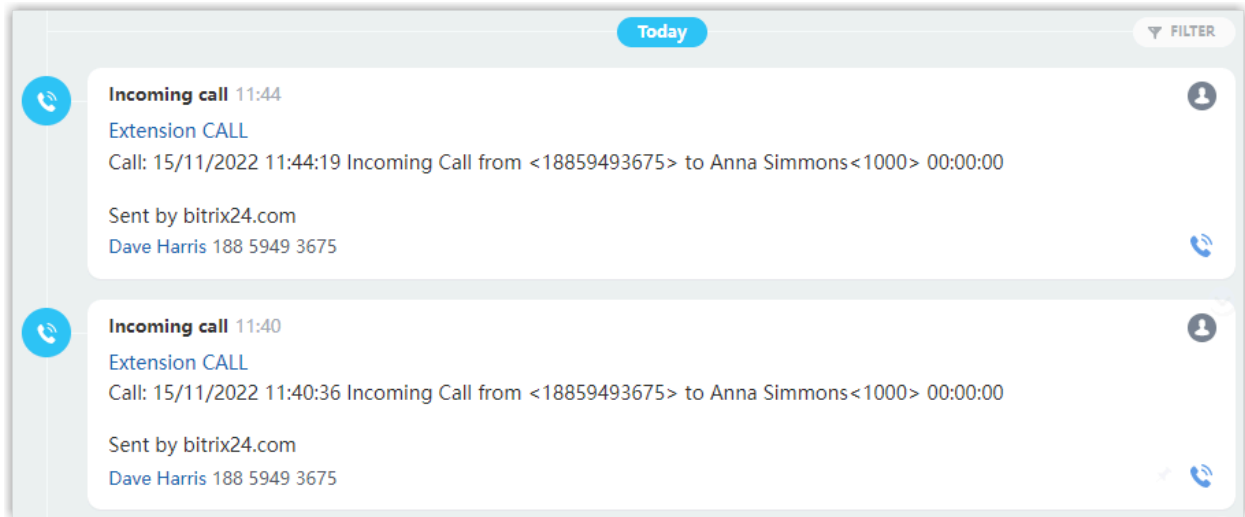
The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



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.



Contact Synchronization

Inbound calls will trigger a Bitrix24 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			

Automatic Lead or Contact Creation

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

For more information, see [Set up Automatic Lead or Contact Creation for Bitrix24 CRM](#).

Automatic New Contact -18850152394

General

Invoices

Deals

Quotes

Workflows

Dependencies

History

ABOUT CONTACT

edit

Phone

188 5015 2394

Work Phone

Select field

Create field

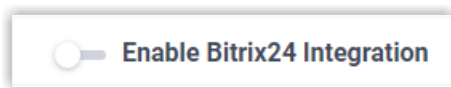
Delete section

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

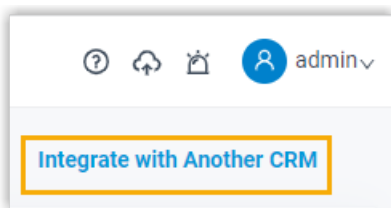
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

Disconnect Bitrix24 CRM Integration

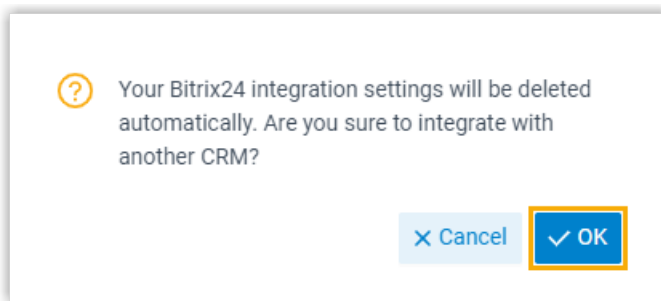
When you want to integrate with another CRM account, you need to disconnect the current CRM integration first.

Procedure

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



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.