

Odoo CRM Integration Guide

Yeastar P-Series Appliance Edition

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Contents

About This Guide.....	1
Set up Odoo CRM Integration.....	4
Integrate Yeastar P-Series PBX System with Odoo CRM.....	4
Set up Contact Synchronization with Odoo CRM.....	11
Set up Lead or Contact Creation for Odoo CRM.....	13
Set up Call Popup.....	16
Set up Call Journal to Odoo CRM.....	20
Use Odoo CRM Integration.....	21
Disable Odoo CRM Integration.....	26
Disconnect Odoo CRM Integration.....	27

About This Guide

Yeastar P-Series PBX System supports the integration with Odoo CRM, which allows your Odoo 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

Odoo

- **Hosting type:** Odoo Online
- **Edition:** Odoo Enterprise
- **Version:** Odoo 14.0 or later

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 Odoo CRM provides the following key features:

Click to Call

Users can launch calls by a single click on the detected numbers from Odoo 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 Odoo CRM when a user ends calls with CRM contacts.

Contact Synchronization

Synchronize CRM contacts to an associated PBX phonebook when the associated extensions receive inbound calls from / or initiating outbound calls to Odoo CRM contacts.

Contact Creation

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

Terminologies

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

Term	Description
Odoo Administrator	The administrator account that created the database where Odoo CRM is installed.
PBX Extension	The extension number for internal staffs. The staffs can register the extension on a phone or on Linkus Clients, and use the extension to make and receive calls.
Odoo Lead	The potential customers or unqualified sales opportunities recorded in your database. A lead is an additional stage before an opportunity that salespersons can follow up on and convert it into a new opportunity.
Odoo Individual	A type of contact recorded in your database. When integrating Odoo CRM with PBX, individuals refer to the external contacts.
Odoo Company	A type of contact recorded in your database. When integrating Odoo CRM with PBX, companies refer to the external contacts.

Related information

[Integrate Yeastar P-Series PBX System with Odoo CRM](#)

[Set up Contact Synchronization with Odoo CRM](#)

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

[Set up Call Popup](#)

[Use Odoo CRM Integration](#)

[Disable Odoo CRM Integration](#)

[Disconnect Odoo CRM Integration](#)

Set up Odoo CRM Integration

Integrate Yeastar P-Series PBX System with Odoo CRM

This topic describes how to integrate Yeastar P-Series PBX System with Odoo CRM.

Prerequisites

Odoo

- **Hosting type:** Odoo Online
- **Edition:** Odoo Enterprise
- **Version:** Odoo 14.0 or later
- **Account:** Use **Administrator account** of the Odoo database for integration.
- Collect the following information from your Odoo database:
 - The name of the database where Odoo CRM is installed.
 - The domain name of the database where Odoo CRM is installed.

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.

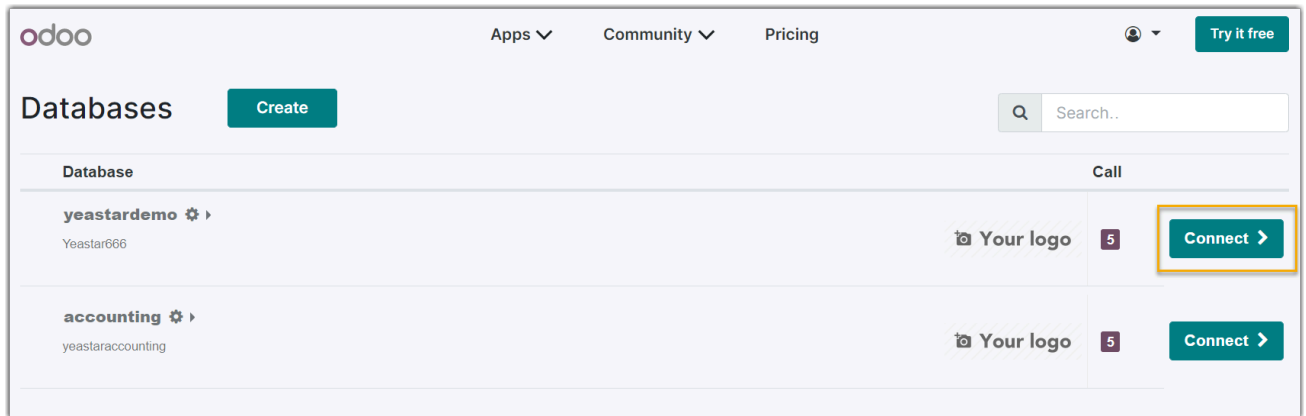
Procedure

- [Step 1. Generate an API Key on Odoo](#)
- [Step 2. Connect Odoo CRM to Yeastar P-Series PBX System](#)
- [Step 3. Associate Odoo CRM users with PBX extensions](#)

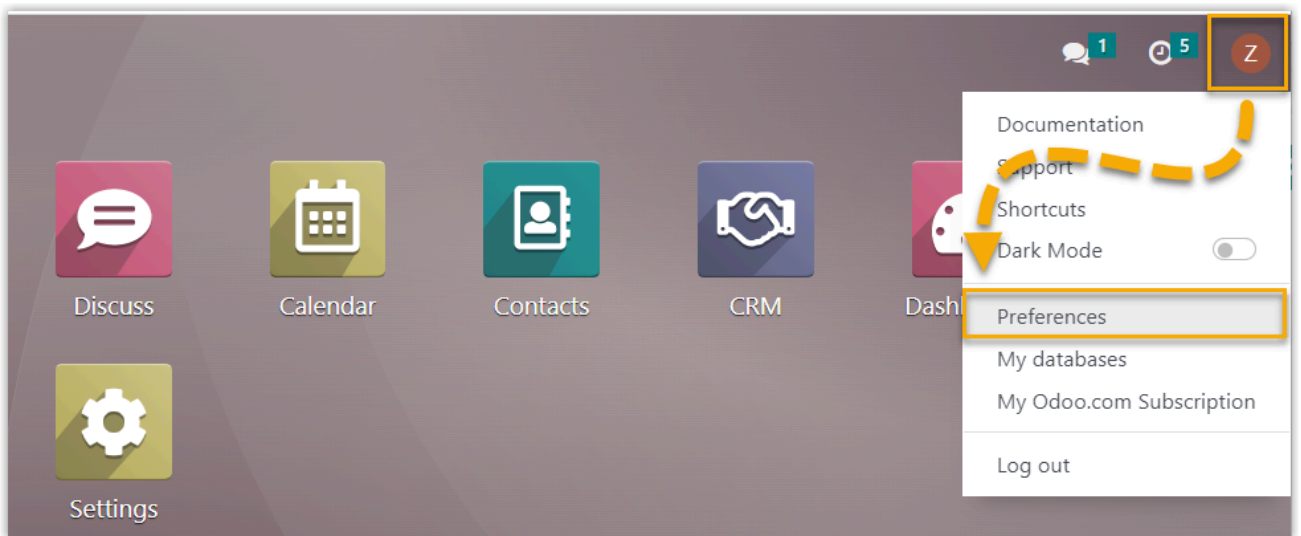
Step 1. Generate an API Key on Odoo

Generate an API key on Odoo for integrating with Yeastar P-Series PBX System.

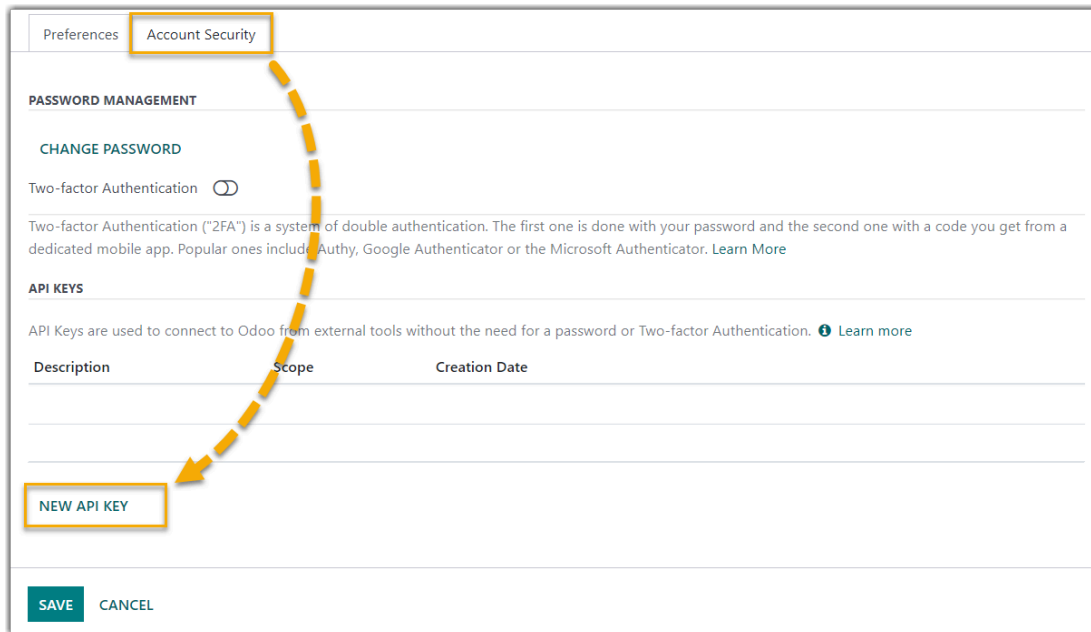
1. Log in to the [Odoo Database Manager](#) with an administrator account.
2. Click **Connect** beside the database where Odoo CRM is installed.



3. In the Odoo dashboard page, click the account button at the top-right corner, then select **Preferences**.



4. In the pop-up window, click the **Account Security** tab, and click **NEW API KEY**.



- On the **New API Key** page, enter the description for this API key, and click **GENERATE KEY**.

- Note down the API key, and click **DONE** to close this page.

The API key will be used to authorize Yeastar P-Series PBX System to access your Odoo's user data and CRM data using the API.

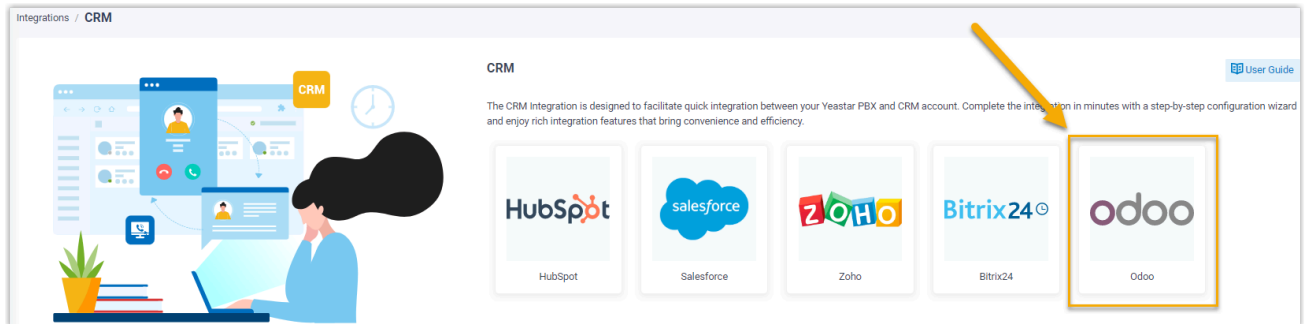


Note:

After the API key is generated, you cannot view the API key in the Odoo system. If you forget the API key, you can delete it and generate a new one.

Step 2. Connect Odoo CRM to Yeastar P-Series PBX System

1. Log in to PBX web portal, go to **Integrations > CRM > Odoo**.

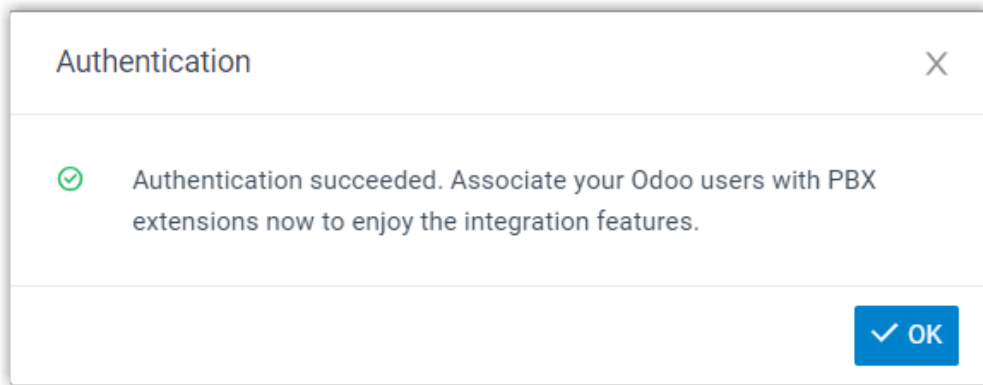


2. Fill in the authentication information collected from Odoo.

The screenshot shows the authentication form for Odoo CRM integration. It has four fields arranged in a 2x2 grid:

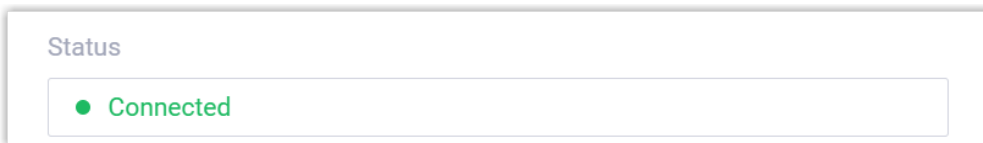
- * Your Odoo Address:** A text input field containing 'https://yeastardemo.odoo.com'.
- * Database Name:** A text input field containing 'yeastardemo'.
- * Administrator Login Name:** A text input field with masked characters (dots) and an eye icon to toggle visibility.
- * API Key:** A text input field with masked characters (dots) and an eye icon to toggle visibility.

- **Your Odoo Address:** Enter the domain name of the database where Odoo CRM is installed.
 - **Database Name:** Enter the name of the database where Odoo CRM is installed.
 - **Administrator Login Name:** Enter the login email address of the Odoo administrator account.
 - **API Key:** Paste the [API key created in Step 1](#).
3. Click **Save**.
A pop-up window displays the authentication result.




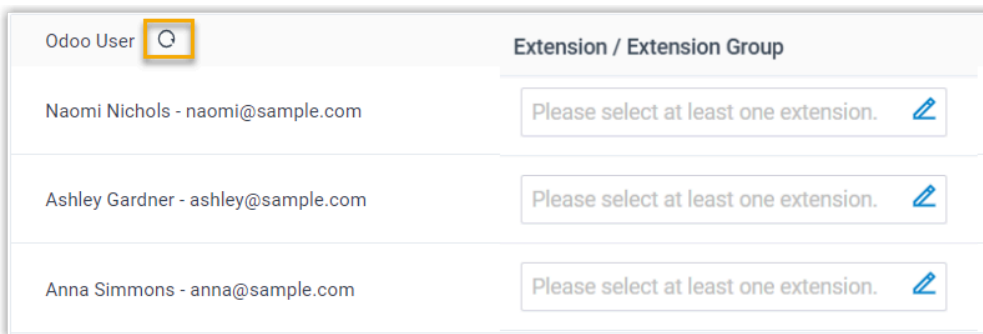
4. Click **OK** to confirm.

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



Step 3. Associate Odoo CRM users with PBX extensions

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



2. Associate the Odoo users with PBX extensions.

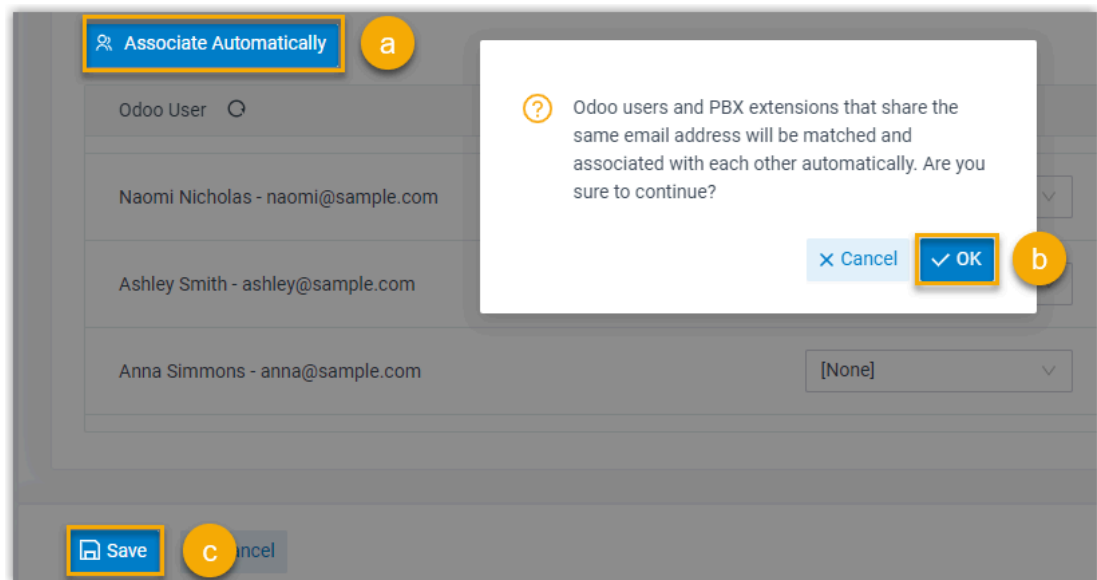
 **Note:**



PBX automatically retrieves Odoo users of all types (Internal, Portal, and Public Users). You only need to associate PBX extensions with the Odoo users who require it.

Associate automatically

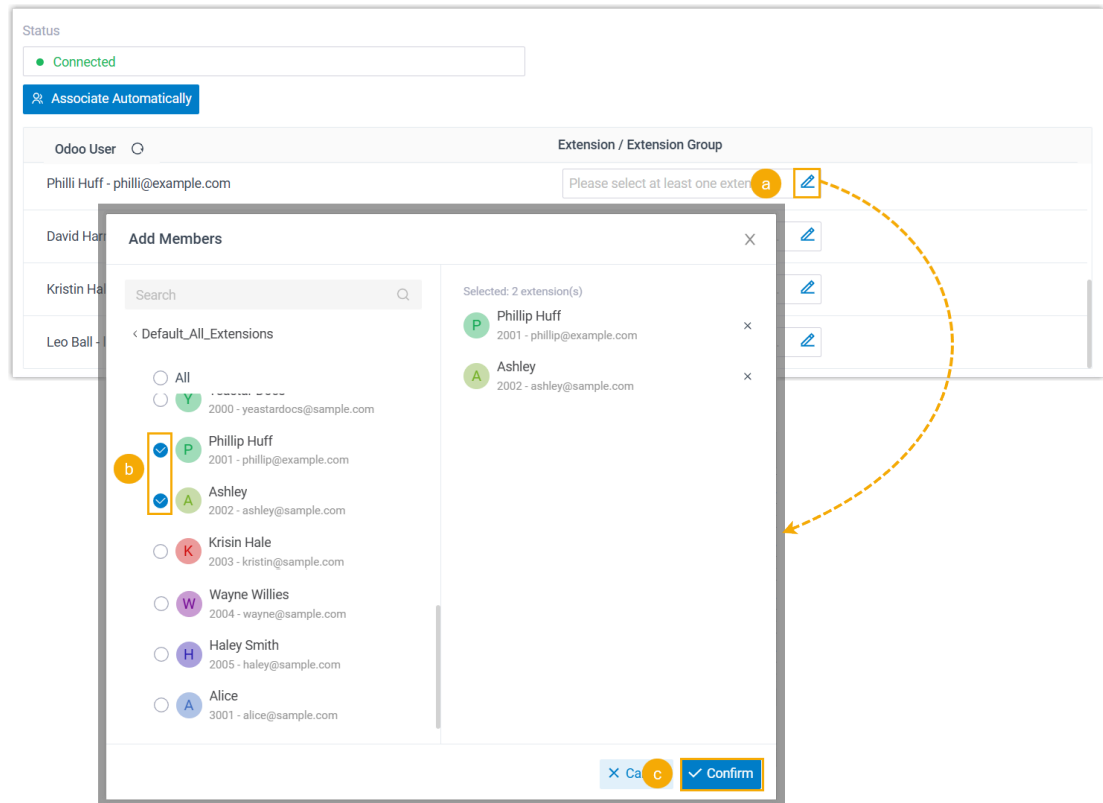
If users bind the same email address to their Odoo accounts and PBX extensions, you can implement automatic association of their Odoo accounts and PBX extensions as follows:




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

Associate manually

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



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

Result

- The integration of Yeastar P-Series PBX System and Odoo CRM is completed.
- Odoo users in the database can make or receive calls with their PBX extensions.

What to do next

- [Set up Contact Synchronization with Odoo CRM](#)
- [Set up Lead or Contact Creation for Odoo CRM](#)
- [Set up Call Popup](#)
- [Use Odoo CRM Integration](#)

Set up Contact Synchronization with Odoo CRM

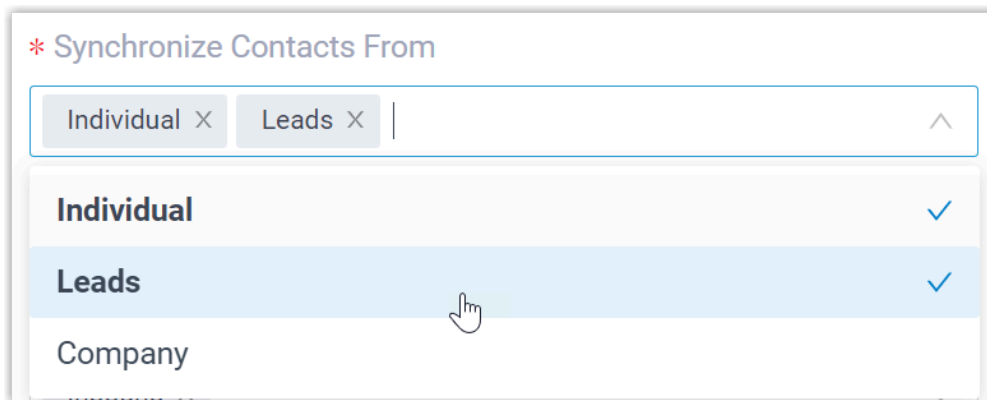
After integrating Yeastar P-Series PBX System and Odoo CRM, you can enable a one-way contact synchronization to sync the Odoo CRM external Contacts to a specific PBX phonebook.

Prerequisites

You have [integrated Yeastar P-Series PBX System and Odoo 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 Odoo CRM.



- **Individual:** A type of external contact that is recorded in your database.
 - **Leads:** The potential customers or unqualified sales opportunities that are recorded in your database.
 - **Company:** A type of external contact that is recorded in your database.
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 synced from Odoo CRM.



Note:

The contacts can only be synchronized to an empty phonebook.

*** Synchronize to Phonebook**

[Create New]

[Create New]

Default_Phonebook

*** Name**

Odoo_CRM_Synchronization

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

☒ **Always Query CRM**

When enabled, PBX will query CRM in real time for contact information and support real-time dial search for CRM contacts in the Linkus client.
When disabled, CRM will only be queried if no matching information is found in the PBX company contacts, and the real-time dial search for CRM contacts in the Linkus client will also be disabled.
Note: Enabling "Always Query" will increase API credit consumption. Please monitor your quota. For details about CRM platform API quotas, refer to the [official documentation](#).

- 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 of **CRM**.

Contacts / Phonebooks			
<div> <div>+ Add</div> <div>Delete</div> </div>		<div>Search</div>	
<input type="checkbox"/>	Phonebook Name	Total Contacts	Operations
<input type="checkbox"/>	Odoo_CRM_Synchronization CRM	0	<div> <div></div> <div></div> </div>

When the associated extensions receive an inbound call from an Odoo CRM contact of [selected type\(s\)](#), or place an outbound call to the contact, PBX will search for the contact's in-

formation, 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 Odoo 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 Odoo CRM

After integrating Yeastar P-Series PBX System and Odoo CRM, you can enable automatic or manual lead or contact creation. This feature helps Odoo 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 and Odoo 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 the **Create Contact or Lead** drop-down list, select the type of contacts to be created.

- **Individual:** Save the unknown number as an [Individual \(contact\)](#).
 - **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 or a lead be automatically created on Odoo CRM.

- **Inbound:** Inbound call from an unknown number that doesn't match a Lead, Individual, or Company already in the CRM.
 - **Outbound:** Outbound call to an unknown number that doesn't match a Lead, Individual, or Company 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

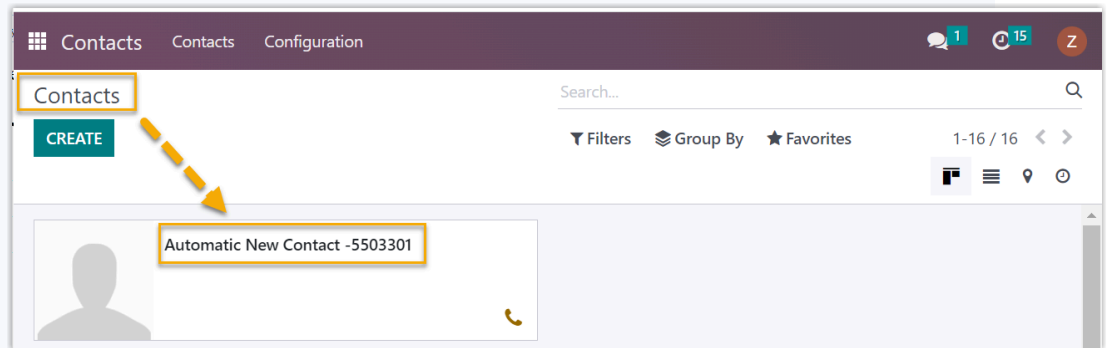
- If automatic creation is configured, when the associated extensions call or receive calls from an unknown number, a new contact or lead will be created on Odoo CRM.



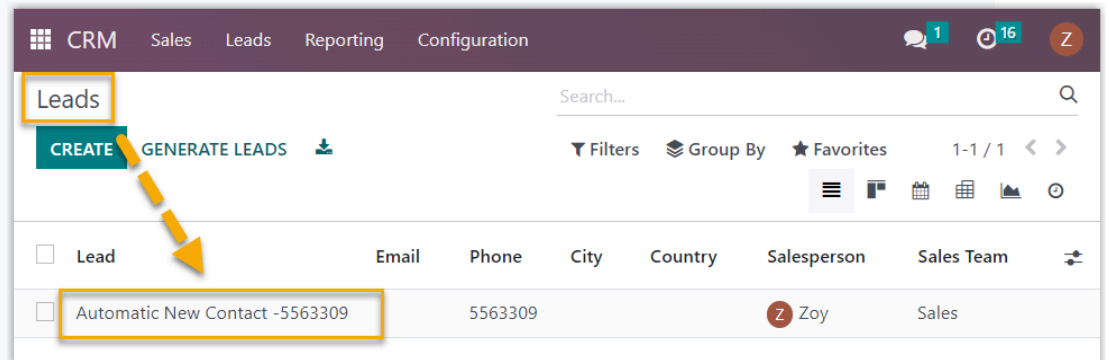
Note:

The name of an auto-created individual (contact) or lead has a prefix of `Automatic New Contact` followed by the number.

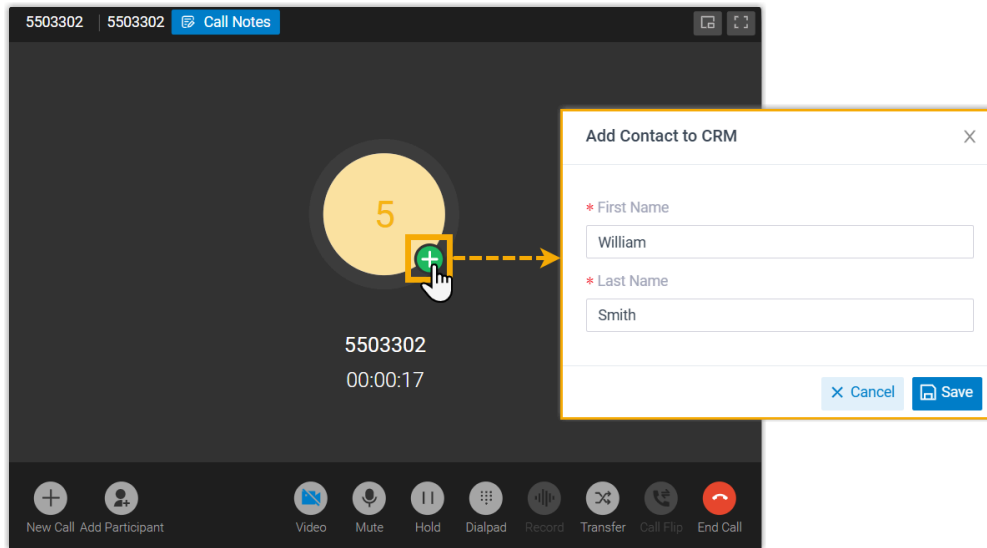
- Auto-created individual (contact):



- Auto-created lead:



- 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 new created contact or lead will also be automatically synchronized into the phonebook in Yeastar P-Series PBX System.


Set up Call Popup

After the integration with Odoo 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.

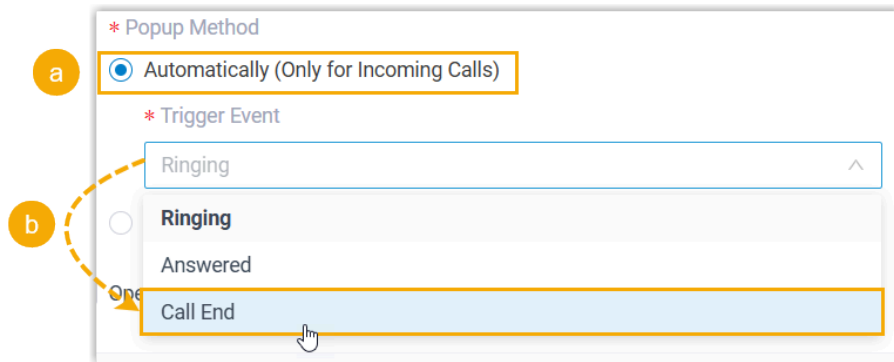
Prerequisites

You have [integrated Yeastar P-Series PBX System and Odoo 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.

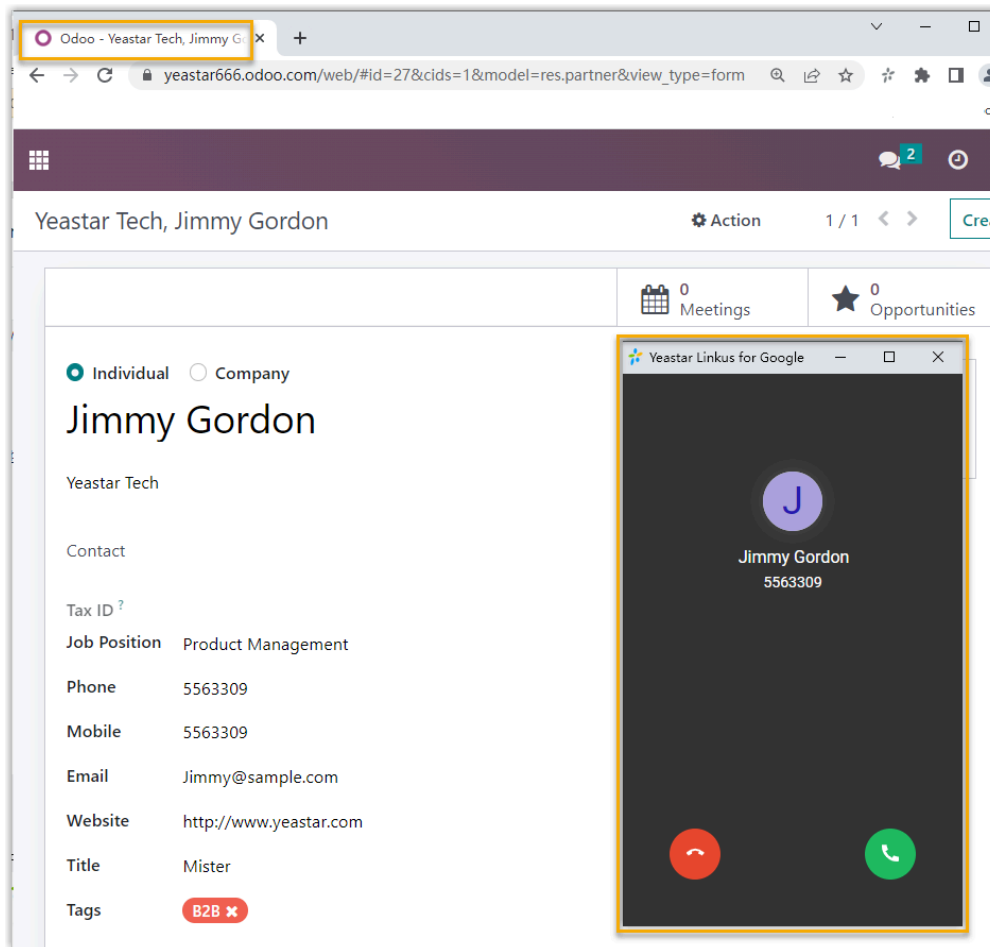
- If you want the system to automatically open the CRM contact details page, do as follows:



- Select **Automatically (Only for Incoming Calls)**.
 - 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**.
- Click **Save**.

Result

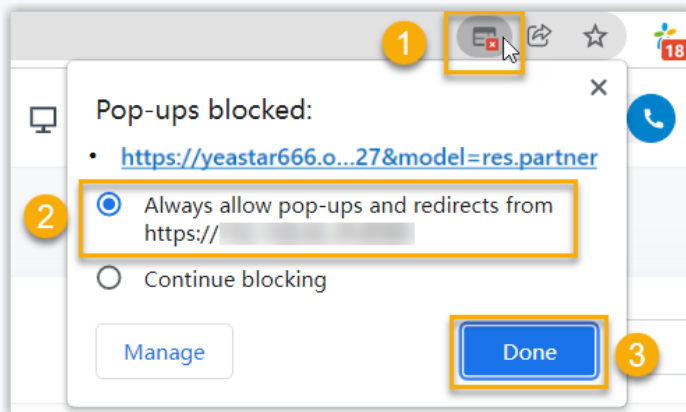
- If automatic call popup is configured, when the specified trigger event occurs on an inbound call from a CRM contact, a new browser tab will be launched to show the contact's information from the CRM.



- 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 Odoo CRM

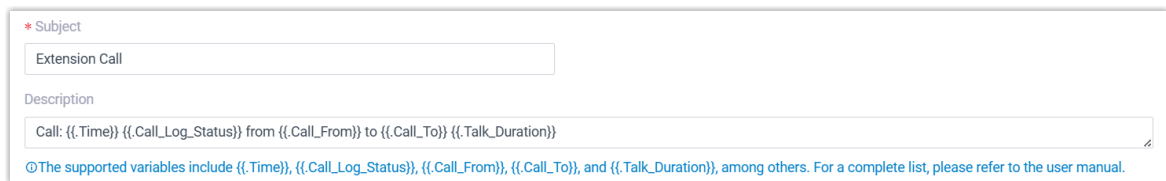
After the integration, you can set up call journal to automatically log all the call activities to Odoo CRM when an associated user ends calls with CRM contacts.

Prerequisites

You have [integrated Yeastar P-Series PBX System and Odoo 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.



The screenshot shows a configuration form with two main sections: 'Subject' and 'Description'. The 'Subject' field contains the text 'Extension Call'. The 'Description' field contains a template string: 'Call: {{.Time}} {{.Call_Log_Status}} from {{.Call_From}} to {{.Call_To}} {{.Talk_Duration}}'. Below the 'Description' field, there is a small blue icon and a note: 'The supported variables include {{.Time}}, {{.Call_Log_Status}}, {{.Call_From}}, {{.Call_To}}, and {{.Talk_Duration}}, among others. For a complete list, please refer to the user manual.'

- **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. **Optional:** Select the checkbox of **Disable Display Missed Call Records in Unanswered Agents** as needed.

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.

Use Odoo CRM Integration

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

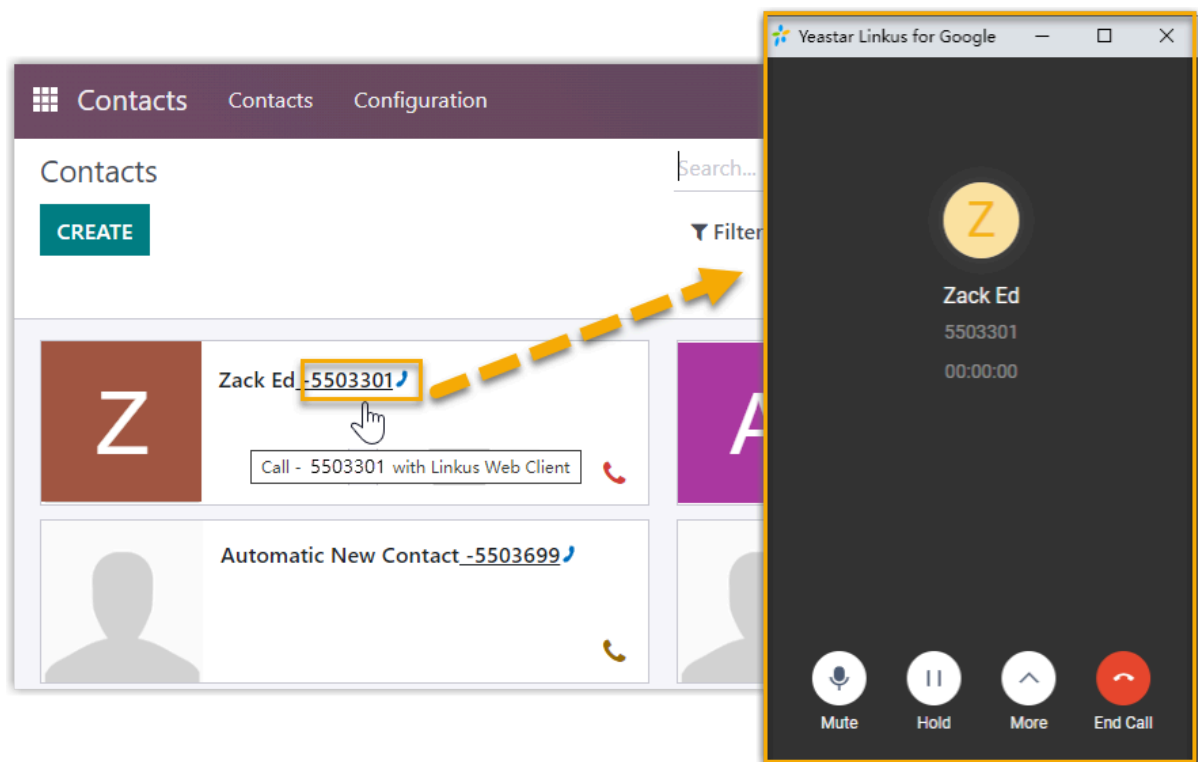
Click to Call

Prerequisites

Install '[Yeastar Linkus for Google](#)' Chrome extension and set up Linkus Web Client to work with the Chrome extension.

Procedure

Users can click on any detected phone numbers on the Odoo CRM web page, a call is then 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.

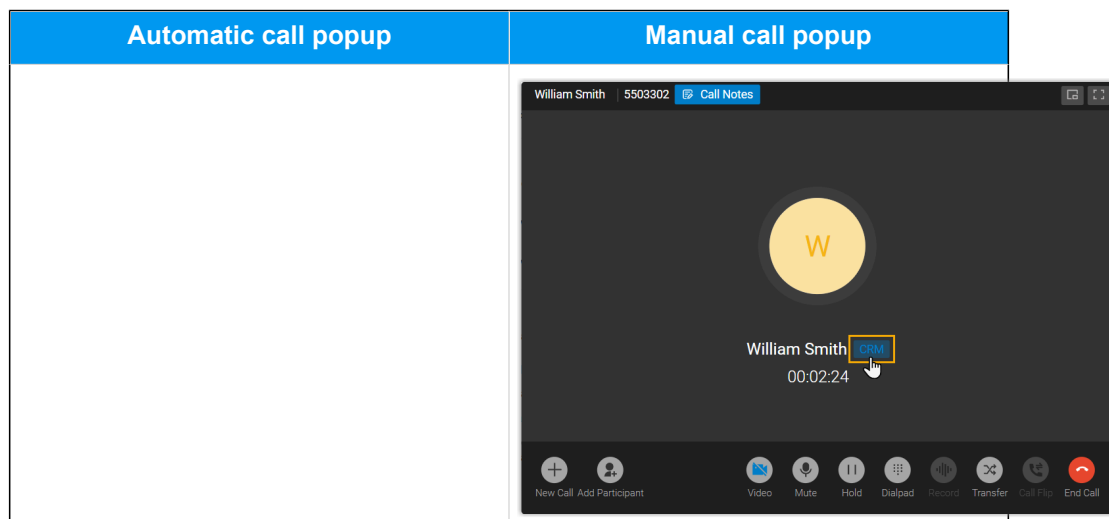
Procedure

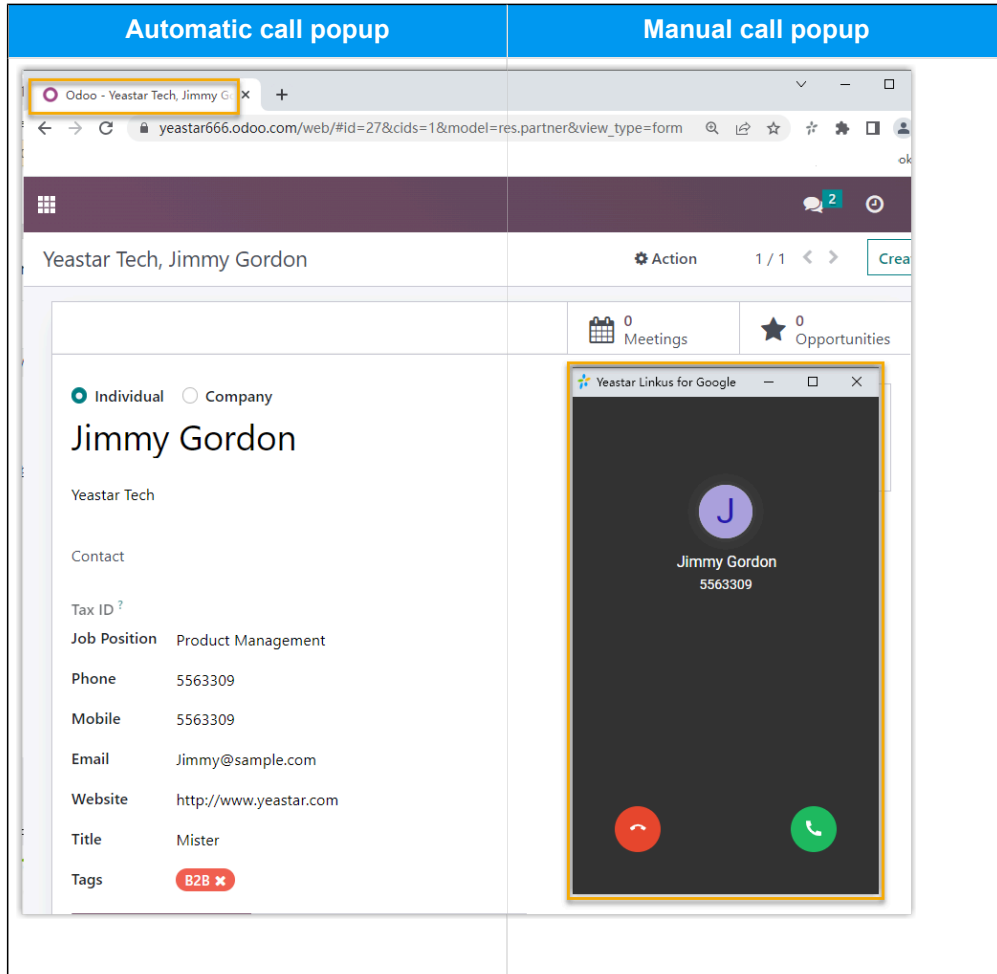
When the Odoo CRM users receive / answer an inbound call from a CRM contact, a new browser tab will automatically be launched to show the CRM contact's information. Additionally, users can manually open the contact's information from the call window during the call.



Note:

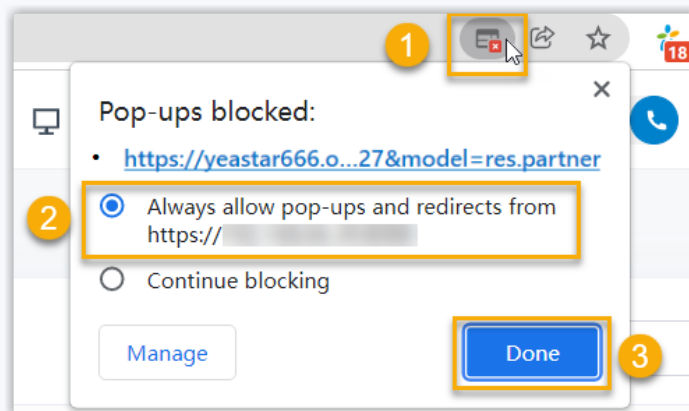
For more information about the settings, see [Set up Call Popup](#).





Note:

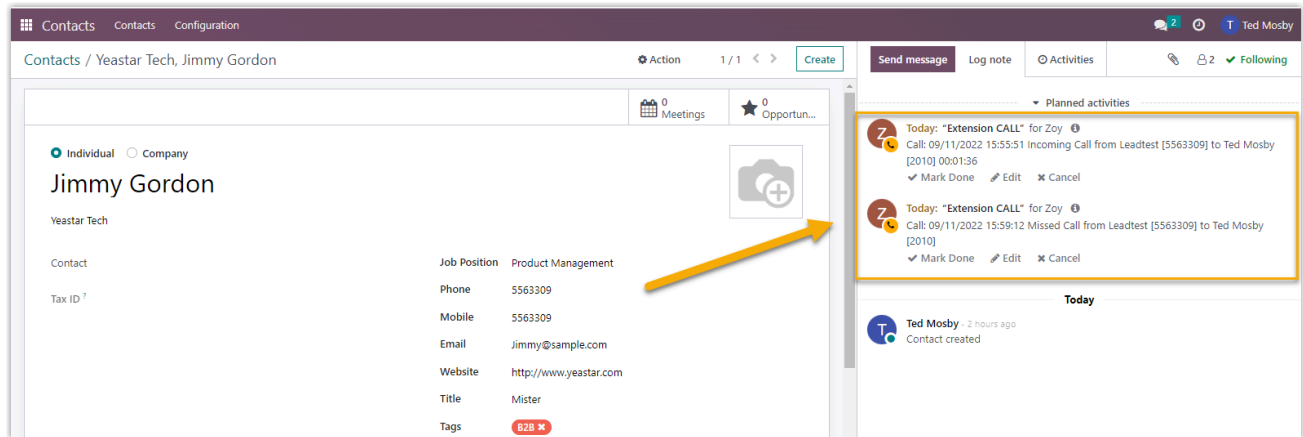
The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**.



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.

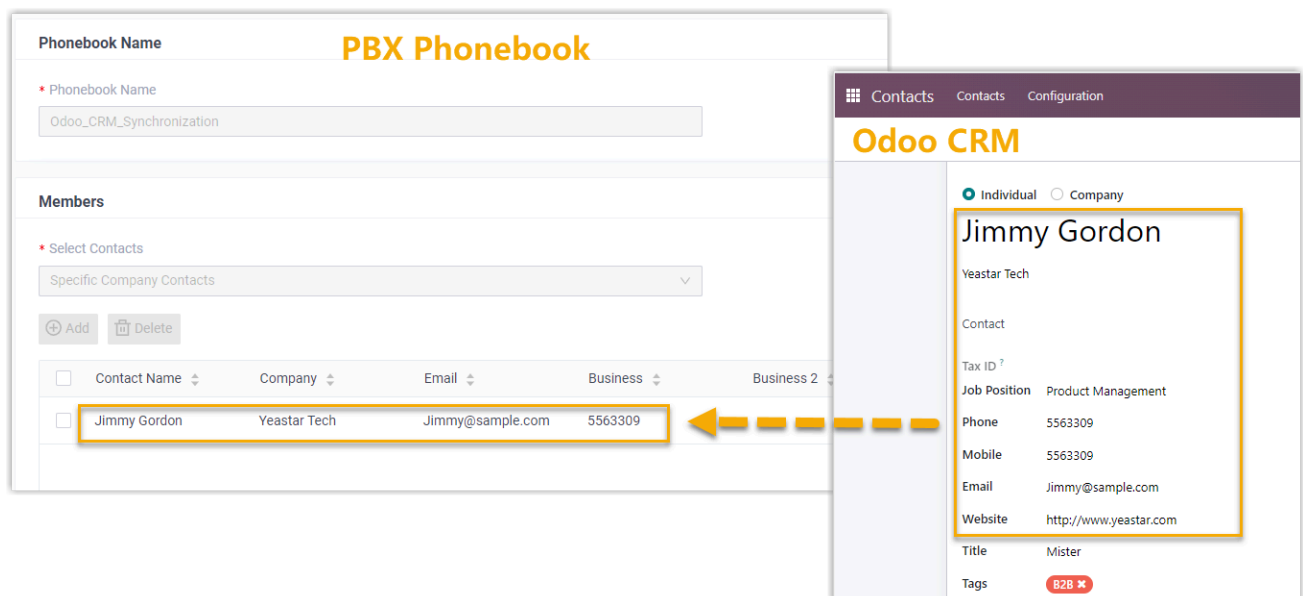
Users can log in to the Odoo CRM, go to the **Activity** tab in a contact detail page to view the call logs.



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 Odoo CRM, the matched Odoo contact will be synchronized to the associated PBX phonebook, and the synchronized contact is read-only.

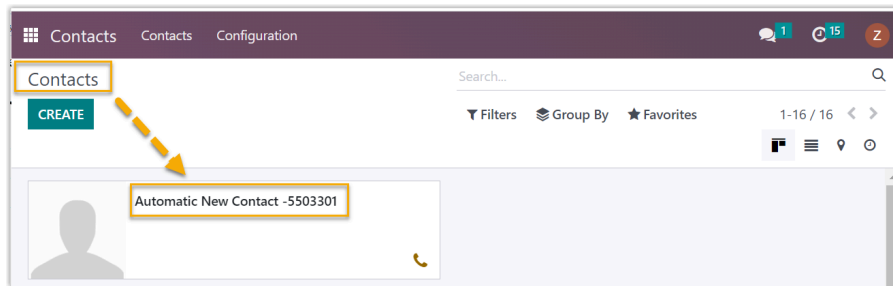
For more information, see [Set up Contact Synchronization with Odoo CRM](#).



Contact or Lead Creation

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

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

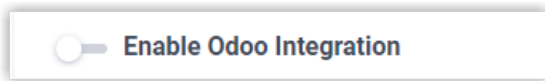


Disable Odoo CRM Integration

You can disable the Odoo 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. Turn off the **Enable Odoo Integration** switch on the top.



3. Click **Save**.

Result

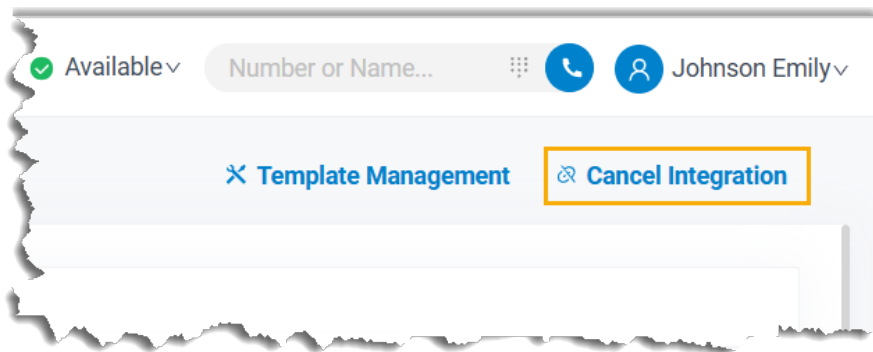
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

Disconnect Odoo CRM Integration

If 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 Odoo 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.