

# Odoo CRM Integration Guide

Yeastar P-Series Appliance Edition

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# 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 37.9.0.18 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 an inbound call from 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 Odoo CRM contacts.

### Automatic Contact Creation

A new contact or lead will 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 Automatic Lead or Contact Creation for Odoo CRM](#)

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

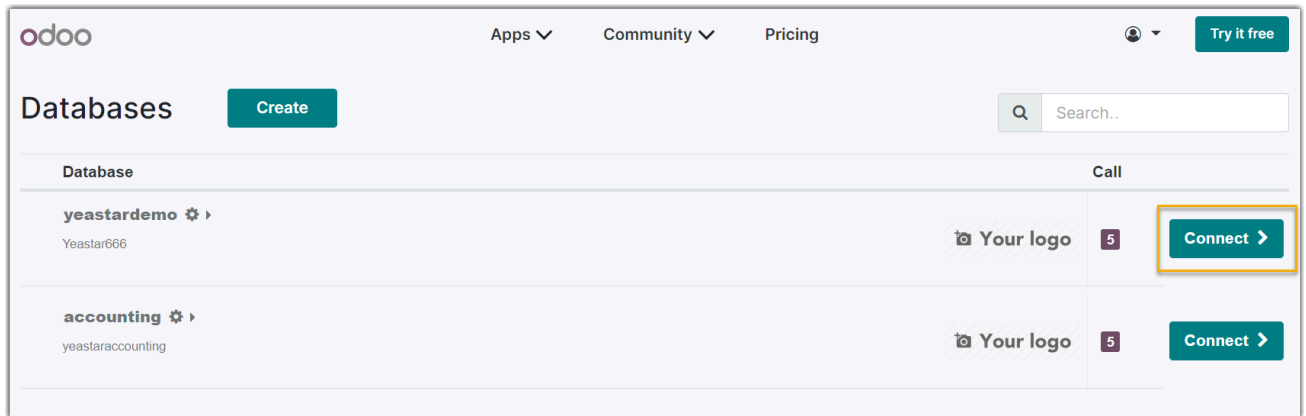
### Procedure

- [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](#)

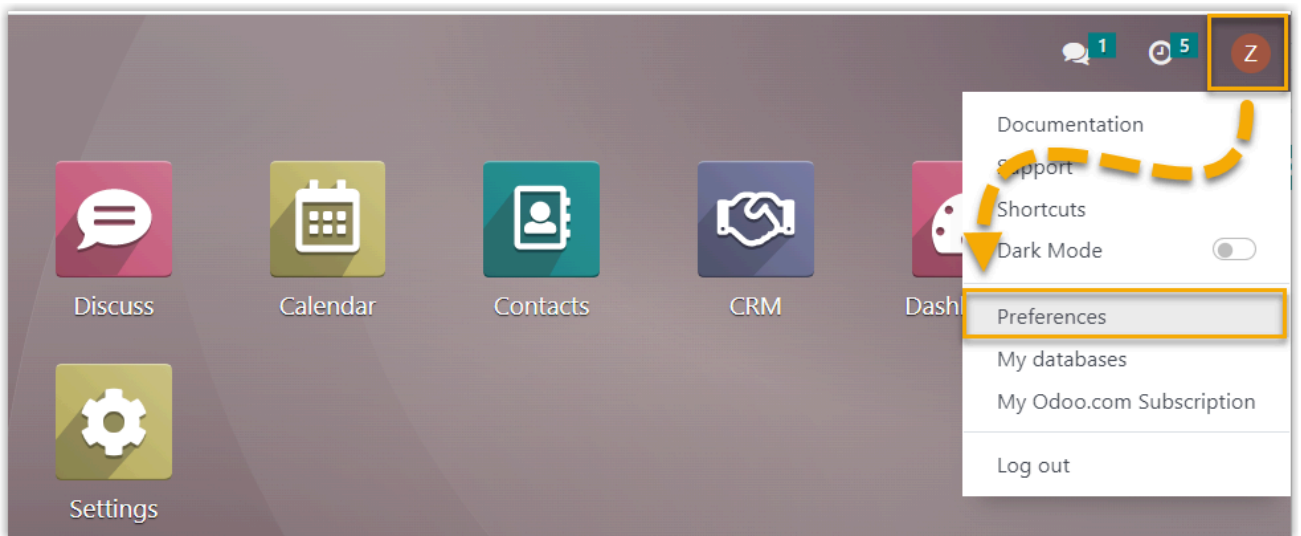
#### Step 1. Generate an API Key on Odoo

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**.

Preferences **Account Security**

**PASSWORD MANAGEMENT**

[CHANGE PASSWORD](#)

Two-factor Authentication ☐

Two-factor Authentication ("2FA") is a system of double authentication. The first one is done with your password and the second one with a code you get from a dedicated mobile app. Popular ones include Authy, Google Authenticator or the Microsoft Authenticator. [Learn More](#)

**API KEYS**

API Keys are used to connect to Odoo from external tools without the need for a password or Two-factor Authentication. [Learn more](#)

Description	Scope	Creation Date

**NEW API KEY**

**SAVE** **CANCEL**

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

**New API Key**

**Name your key**  
Enter a description of and purpose for the key.

**Integration with Yeastar PBX**

It is very important that this description be clear and complete, it will be the only way to identify the key once created.

**GENERATE KEY** **CANCEL**

- 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.

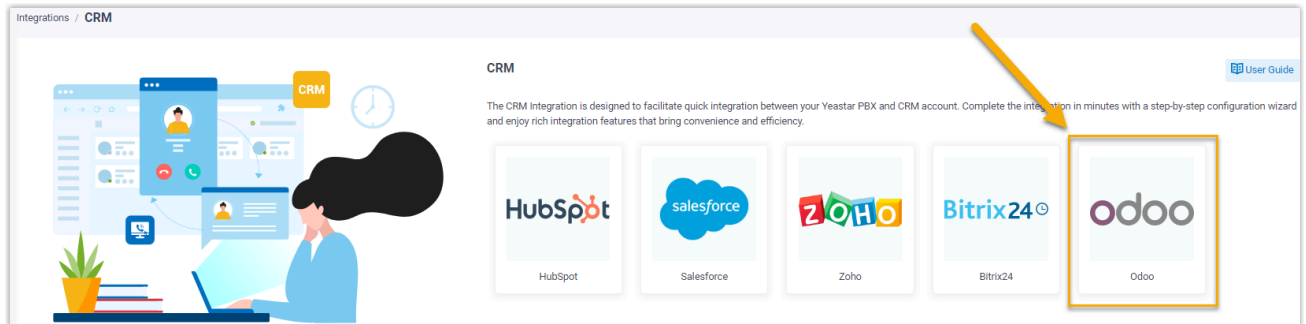


**Note:**

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**.

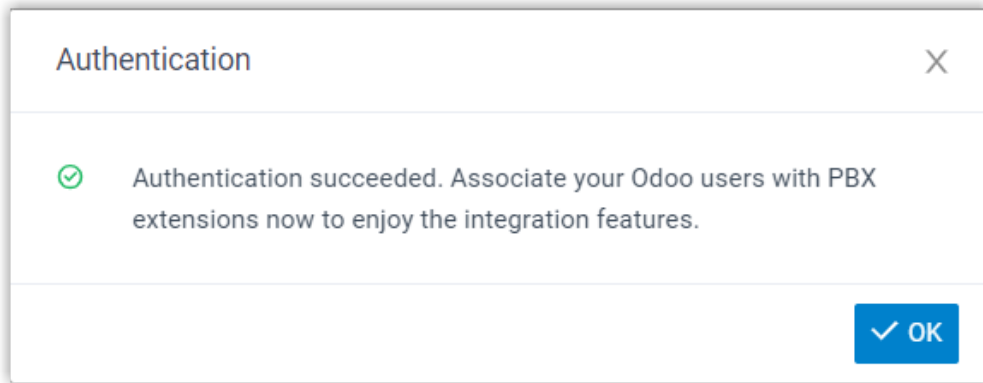


2. Fill in the authentication information collected from Odoo.

* Your Odoo Address	* Database Name
<input type="text" value="https://yeastardemo.odoo.com"/>	<input type="text" value="yeastardemo"/>
* Administrator Login Name	* API Key
<input type="password" value="....."/>	<input type="password" value="....."/>

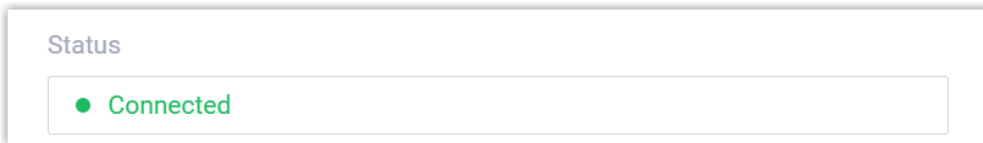
- **Your Odoo Address:** Enter the domain name of the database where Odoo CRM is installed.
  - **Database Name:** Enter the name of the database where Odoo CRM is installed.
  - **Administrator Login Name:** Enter the login email address of the Odoo administrator account.
  - **API Key:** Paste the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










- 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

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

Odoo User 	Extension
Naomi Nichols - naomi@sample.com	[None] 
Ashley Gardner - ashley@sample.com	[None] 
Anna Simmons - anna@sample.com	[None] 

- Associate the Odoo users with PBX extensions.

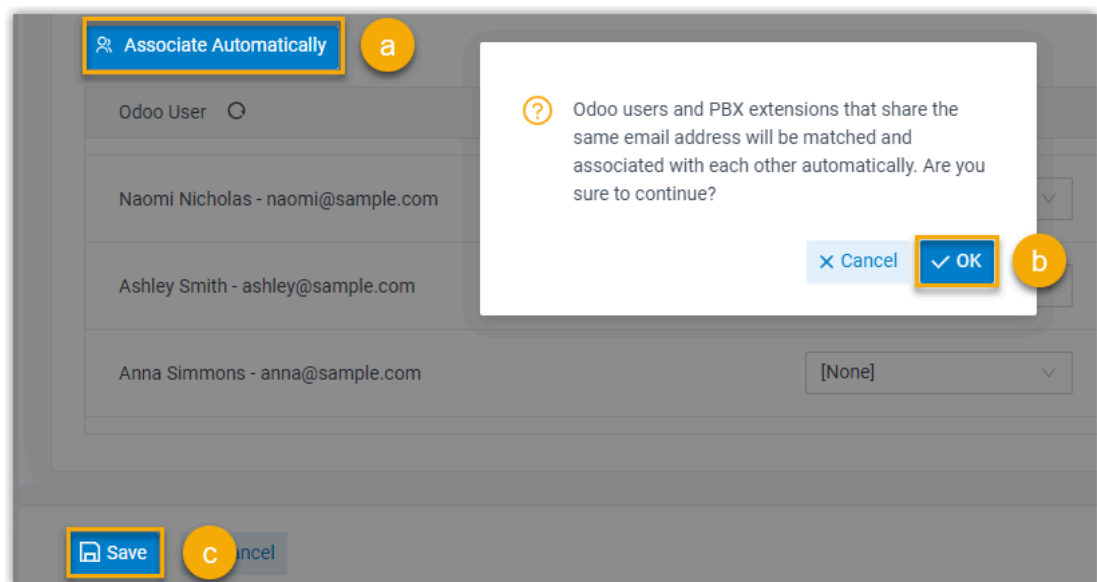




PBX automatically retrieves Odoo users of all types (Internal, Portal, and Public Users). You only need to associate PBX extensions with the Odoo users who require it.

### Associate automatically

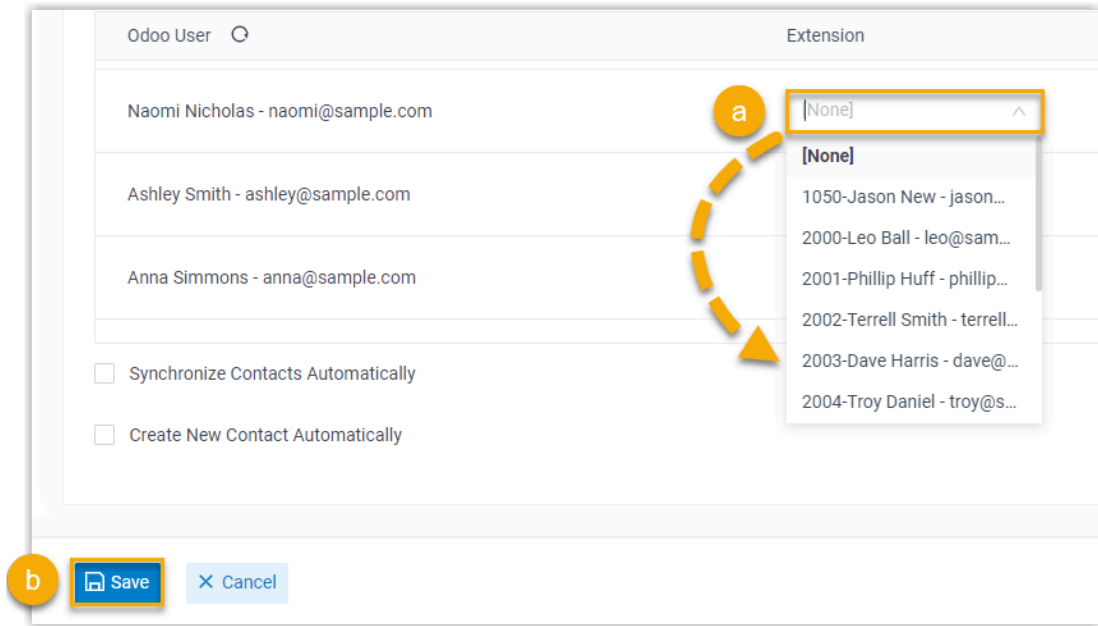
If users bind the same email address to their Odoo accounts and PBX extensions, you can implement automatic association of their Odoo accounts and PBX extensions as follows:



- 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.



- a. In the **Extension** drop-down list beside the desired Odoo user, select the user's extension.
- b. 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 Automatic Lead or Contact Creation for Odoo CRM](#)
- [Use Odoo CRM Integration](#)

## Set up Contact Synchronization with Odoo CRM

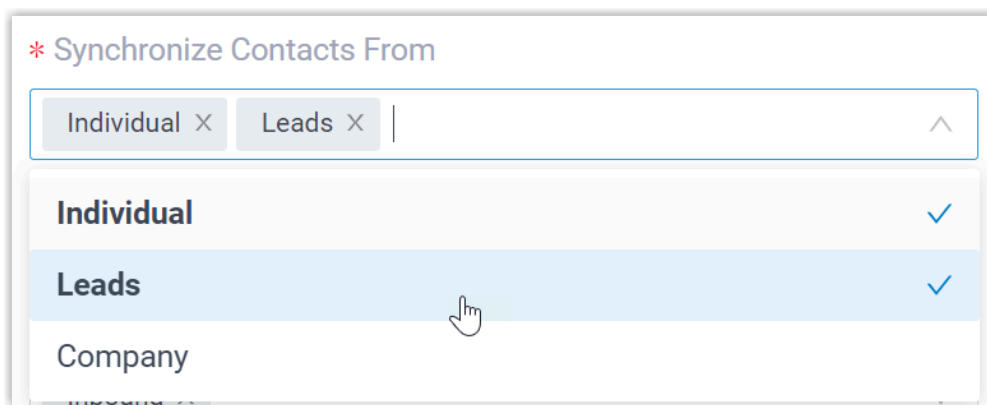
After integrating Yeastar P-Series PBX System and Odoo CRM, you can enable a one-way contact synchronization to sync the Odoo CRM external Contacts to a specific PBX phonebook.

## 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, 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 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. Click **Save**.

## Result

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

Contacts / Phonebooks

+ Add Delete Search

Phonebook Name	Total Contacts	Operations
Odoo_CRM_Synchronization CRM	0	

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



### 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 Automatic Lead or Contact Creation for Odoo CRM

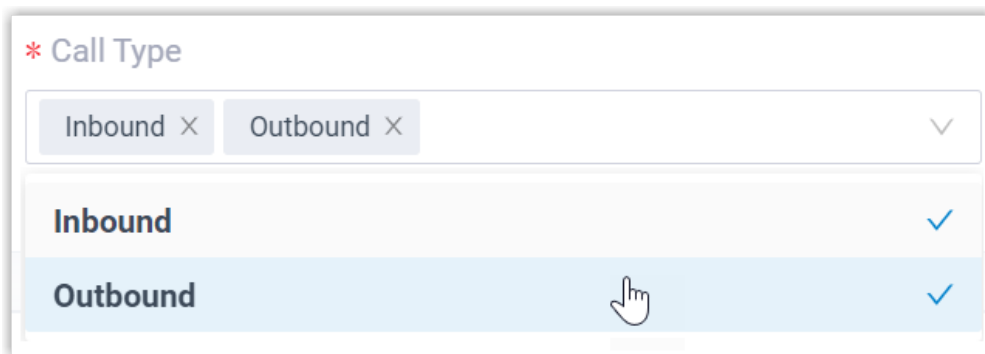
After integrating Yeastar P-Series PBX System and Odoo CRM, you can enable automatic lead or contact creation. This feature helps Odoo users build their contacts database, ensuring that all leads and contacts are captured when unknown calls are received or placed by the CRM users.

## 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, select the checkbox of **Create New Contact Automatically**.
3. In the **Call Type** drop-down list, select when will a contact or a lead be automatically created on Odoo CRM.

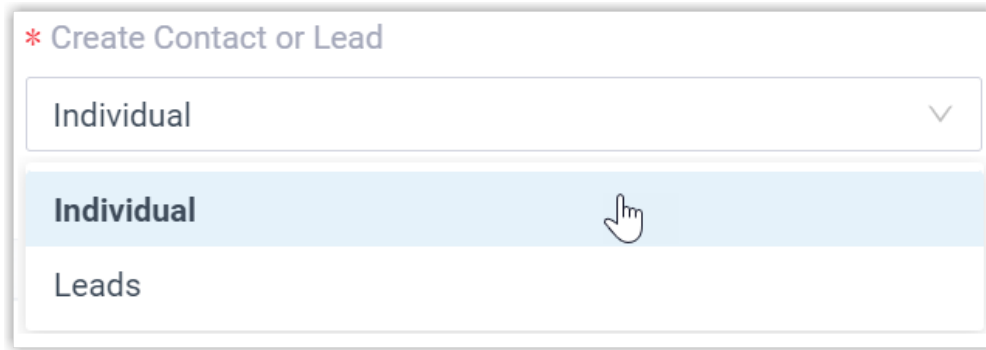


\* Call Type

Inbound × Outbound ×

Inbound	✓
Outbound	✓

- **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.
4. 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](#).
5. Click **Save**.

## Result

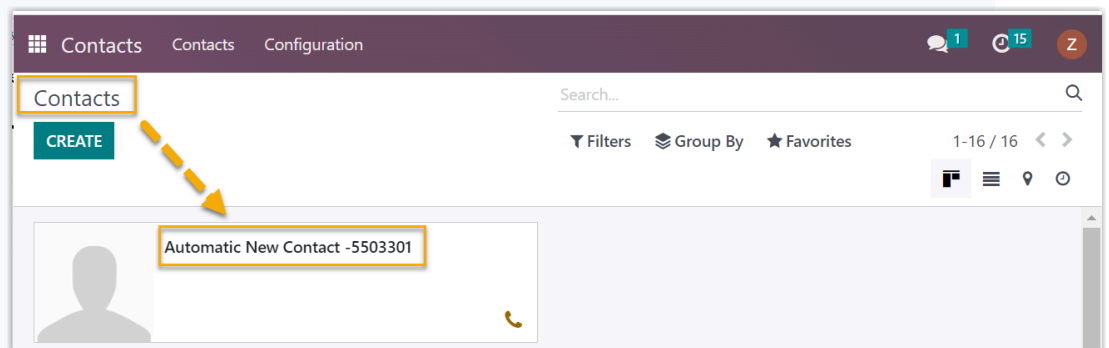
- When the associated extensions call or receive calls from an unknown number, a new contact or lead will be created on Odoo CRM.



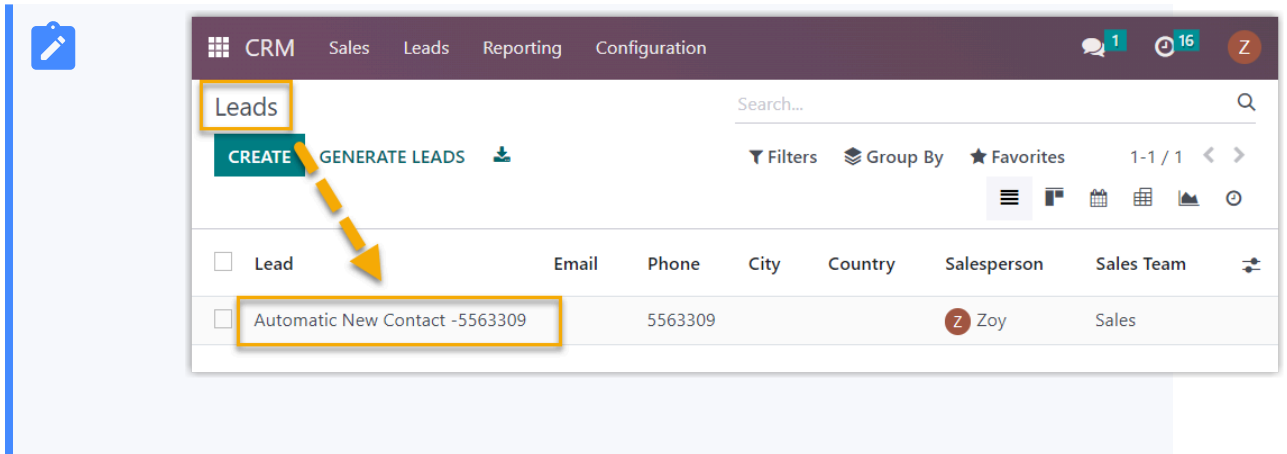
### Note:

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 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.

<input type="checkbox"/>	Contact Name ▾	Company ▾	Business ▾
<input type="checkbox"/>	Automatic New Contact -5503301		5503301



# 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.

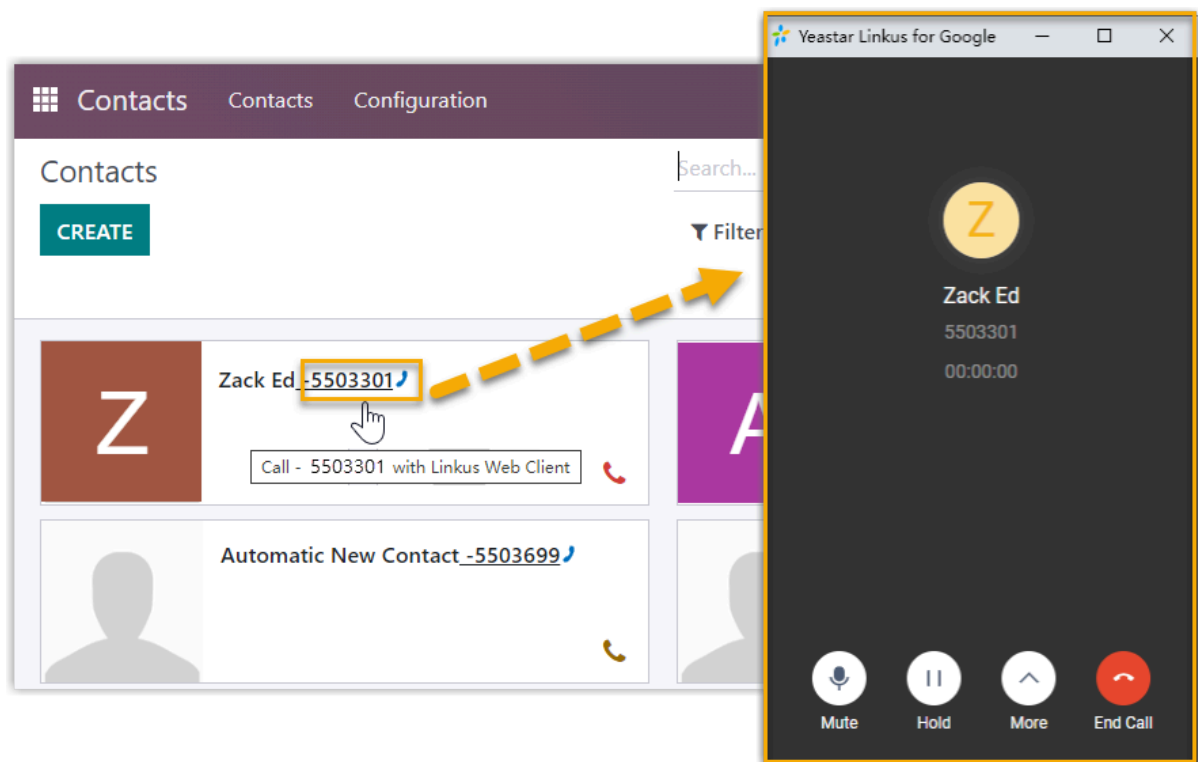
## Click to Call

### 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

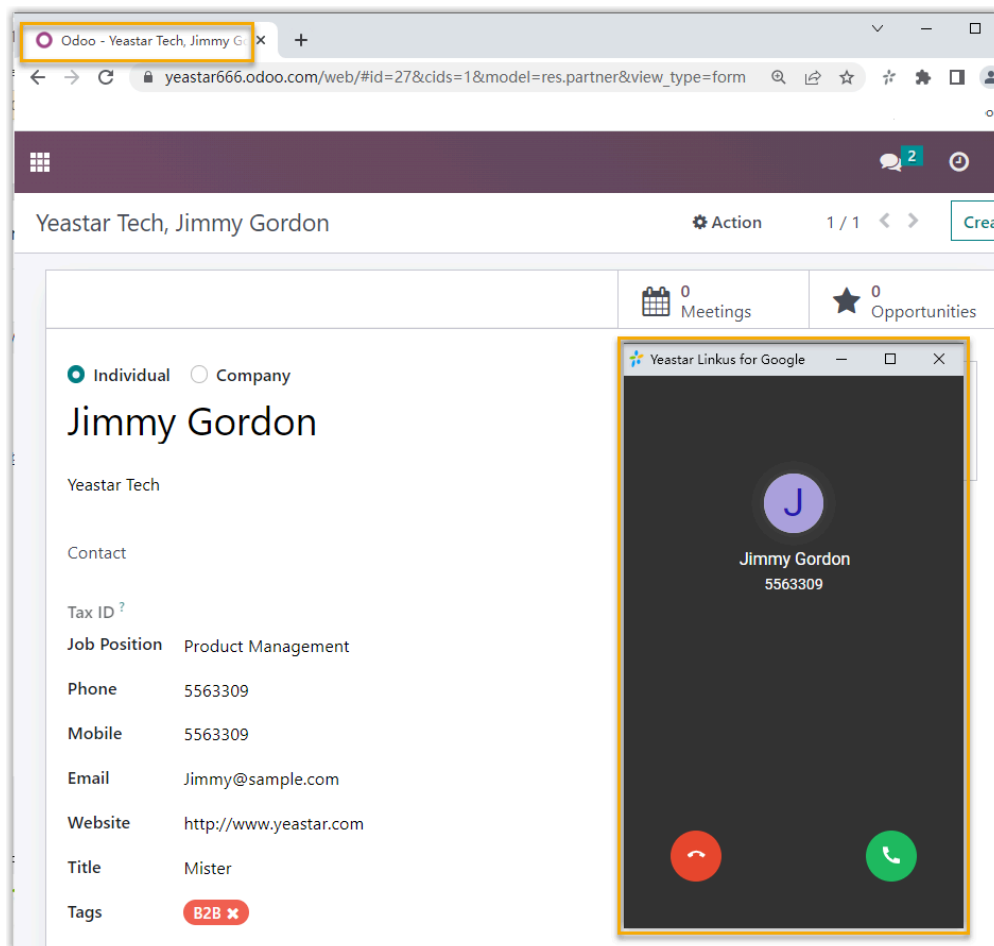


**Note:**

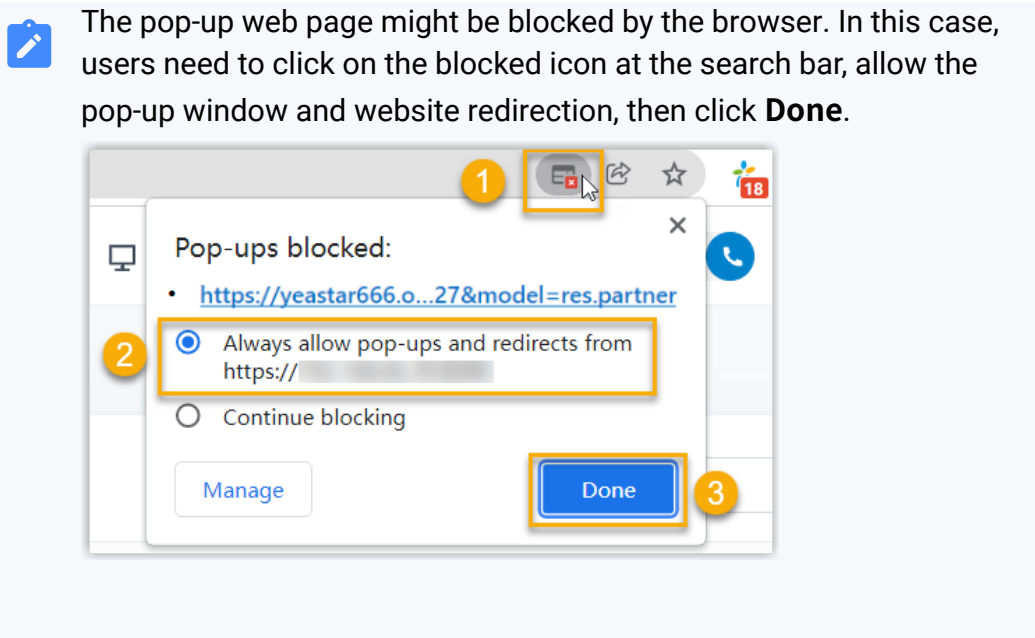
If users close web browser or Linkus Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension '[Yeastar Linkus for Google](#)', which allows for the call pop-up browser tab even when web browser is closed.

## Procedure

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



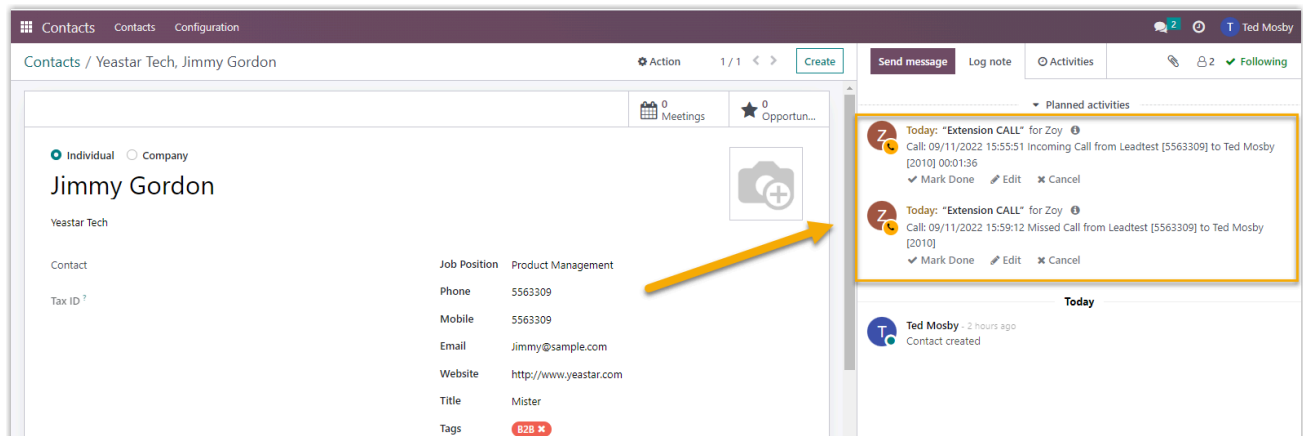
**Note:**



## 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.

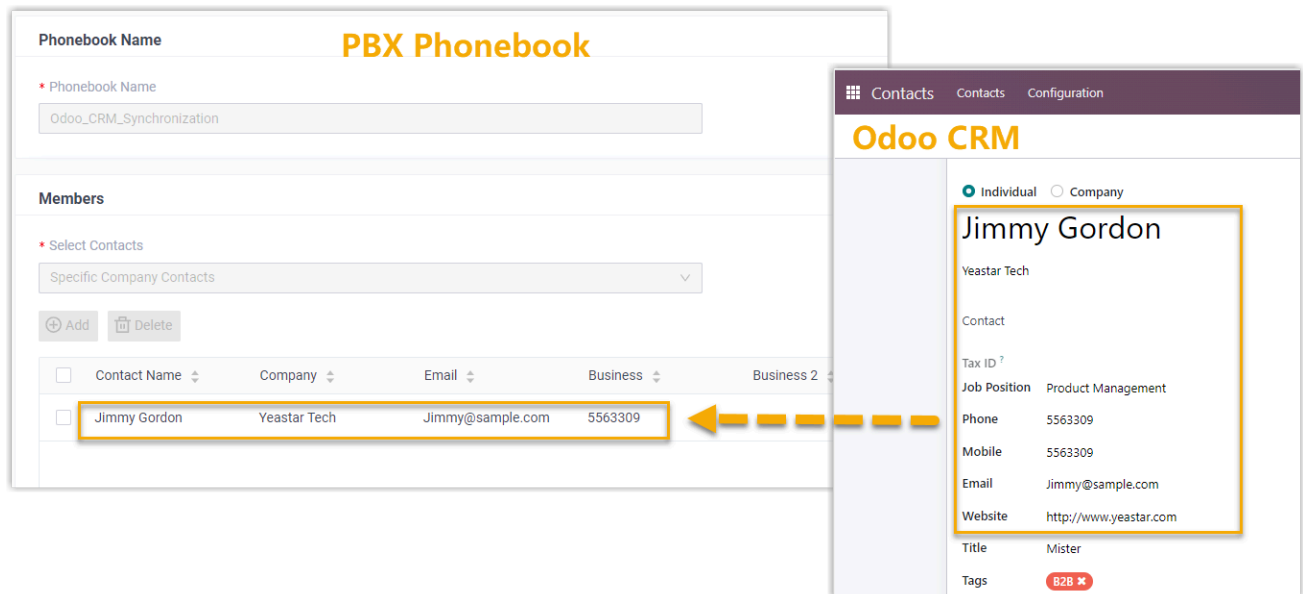
Users can log in to the Odoo CRM, go to the **Activity** tab in a contact detail page to view the call logs.



## Contact Synchronization

Inbound calls will trigger a Odoo CRM contact lookup. If there exists the same number in Odoo CRM, the matched Odoo contact will be synchronized to the associated PBX phone-book, and the synchronized contact is read-only.

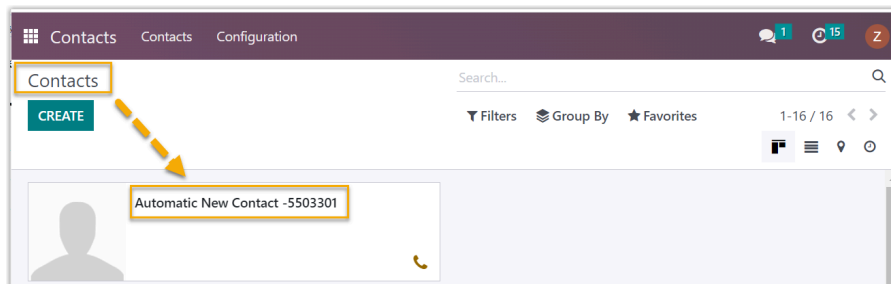
For more information, see [Set up Contact Synchronization with Odoo CRM](#).



## Automatic Contact or Lead Creation

A new individual (contact) or lead will be created automatically in 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 Odoo CRM](#).

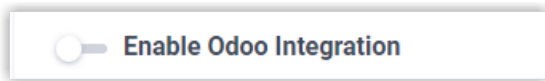


# Disable Odoo CRM Integration

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

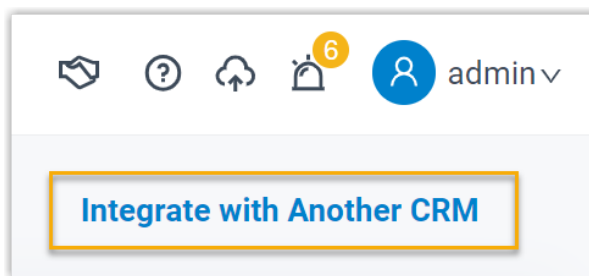
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

# 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 **Integrate with Another CRM**.



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.