Salesforce CRM Integration Guide

Yeastar P-Series Cloud Edition

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Contents

About This Guide

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

Requirements

Salesforce CRM

The integration with Salesforce CRM is supported on the following plans:

- Enterprise Edition
- Unlimited Edition
- Developer Edition
- Performance Edition

PBX server

Firmware: 84.6.0.24 or later

Key features

The integration of Yeastar P-Series Cloud Edition and Salesforce CRM provides the following key features:

Click to Call

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

Contact Synchronization

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

Automatic Contact or Lead Creation

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

Terminologies

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

Table 1.

Term	Description
System Administrator	The system administrator can access all the data and manage all the users in Salesforce CRM.
User	The corporate staff who can only access specific data based on assigned permissions (roles).
PBX Extension	The extension number for each staff. The staffs can register the extension on a phone or on Linkus clients, and use the extension to make and receive calls.
Lead	A new individual or business entity that has entered your database. A raw prospect that you haven't sold in the past, with which salespeople can follow up to search for new sales opportunities.
Contact	The Contact is an individual whose contact information is in your database and has been qualified. They could be a part of a business or organization you are attempting to sell to, they could also be a referral partner or even someone you know personally.
Account	The business entity or organization with which you have business dealings. You may have multiple contacts stored in the same account.

Related information

Integrate Yeastar P-Series Cloud Edition with Salesforce CRM
Set up Contact Synchronization from Salesforce CRM
Set up Automatic Lead or Contact Creation for Salesforce CRM
Use Salesforce CRM Integration
Disable Salesforce CRM Integration

Disconnect Salesforce CRM Integration

Set up Salesforce CRM Integration

Integrate Yeastar P-Series Cloud Edition with Salesforce CRM

This topic describes how to integrate Yeastar P-Series Cloud Edition with Salesforce CRM.

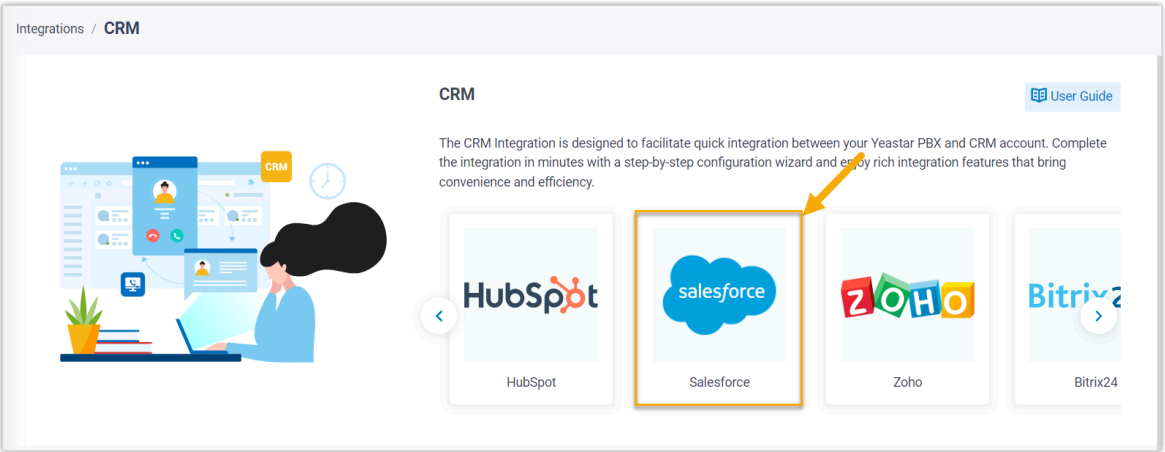
Prerequisites

- Only a system administrator of a Salesforce CRM account can enable the Salesforce CRM integration.

Procedure

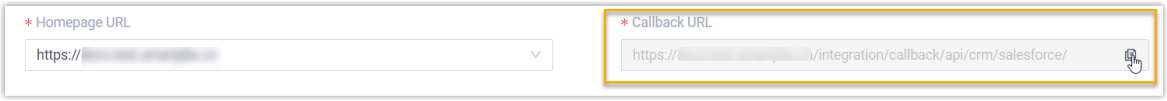
Step 1. Get PBX authentication information

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



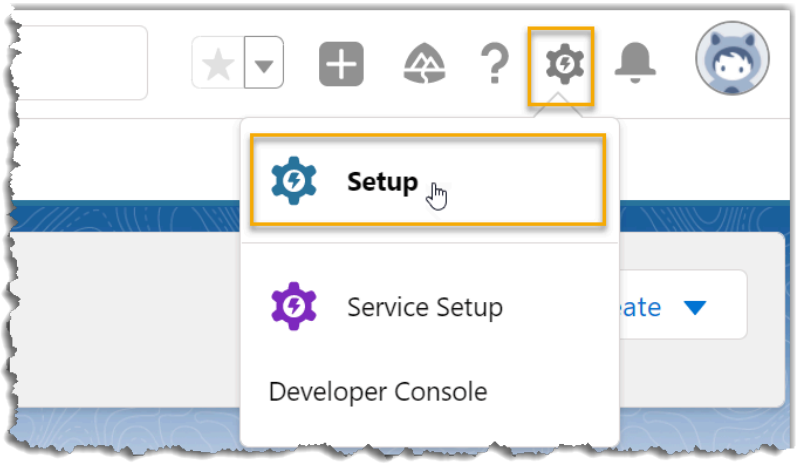
3. In the **Network** section, take note of the **Callback URL** as you will use it later on Salesforce CRM.

> **Note:**
> The **Homepage URL** displays the domain name of your PBX, which is used to compose the **Callback URL**.

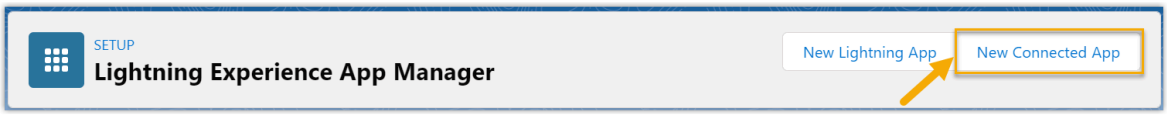


Step 2. Create and configure an application on Salesforce CRM

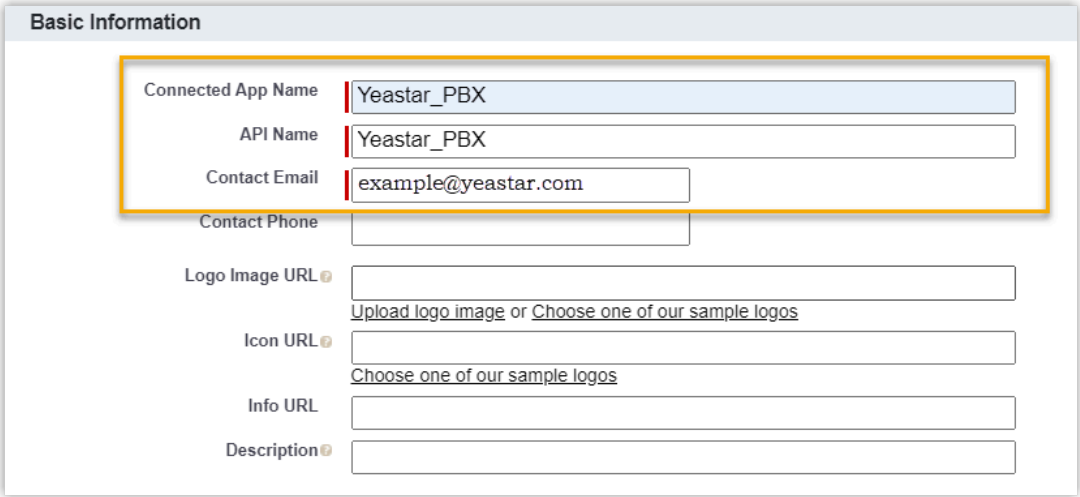
1. Log in to Salesforce CRM.
2. On the top-right corner of the Salesforce page, click , then click **Setup** to enter the **Setup Home** page.



3. On the left navigation bar, go to **PLATFORM TOOLS > Apps > App Manager**.
4. On the top-right corner of the **App Manager** page, click **New Connected App** to create a new application for integration.



   a. In the **Basic Information** section, complete the following settings.



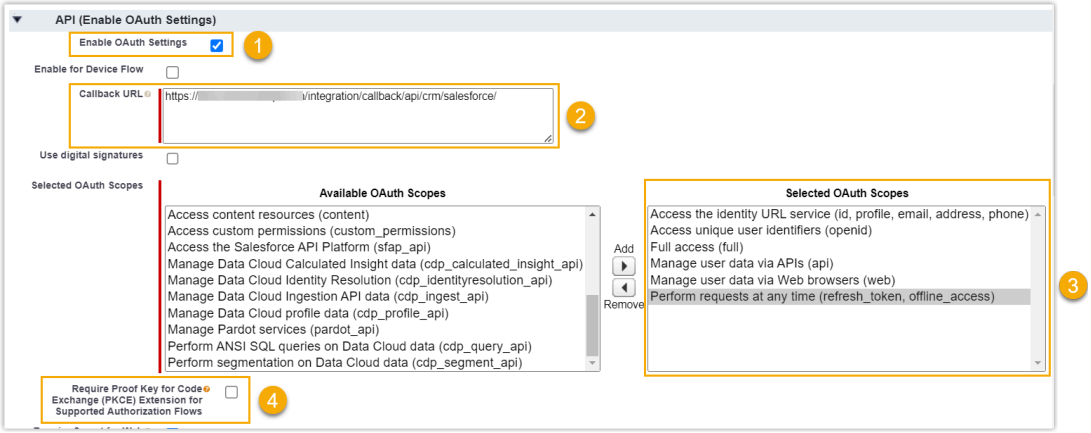
i. In the **Connected App Name** field, enter a name to help you identify the application.

The **API Name** is synchronized with the application name automatically.

ii. In the **Contact Email** field, enter a contact email address.

iii. Fill in other information as needed.

b. Scroll down to **API (Enable OAuth Settings)** section to complete the API configuration.



i. Select the checkbox beside the **Enable OAuth Settings**.

ii. In the **Callback URL** field, paste the Callback URL obtained from the PBX web portal.

iii. In the **Selected OAuth Scopes** section, select the following permission options from **Available OAuth Scopes** box to **Selected OAuth Scopes** box.

- Full access (full)
- Manage user data via APIs (api)

- Manage user data via Web browsers (web)
- Access unique user identifiers (openid)
- Access the identity URL service (id, profile, email, address, phone)
- Perform requests at any time (refresh_token, offline_access)

iv. Unselect the option of **Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows**.

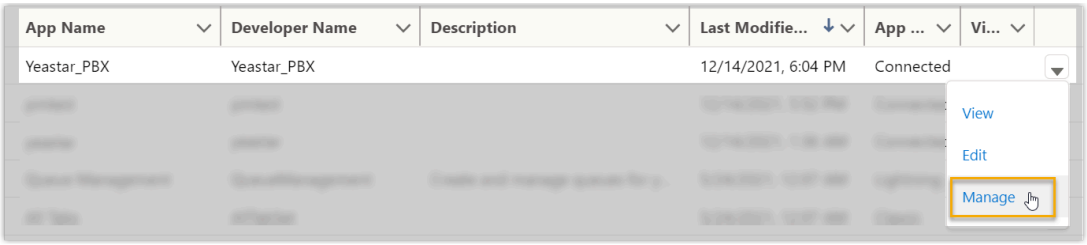
c. Scroll down to the bottom of the page, click **Save**.

The web page prompts that the change may take up to 10 minutes to take effect.

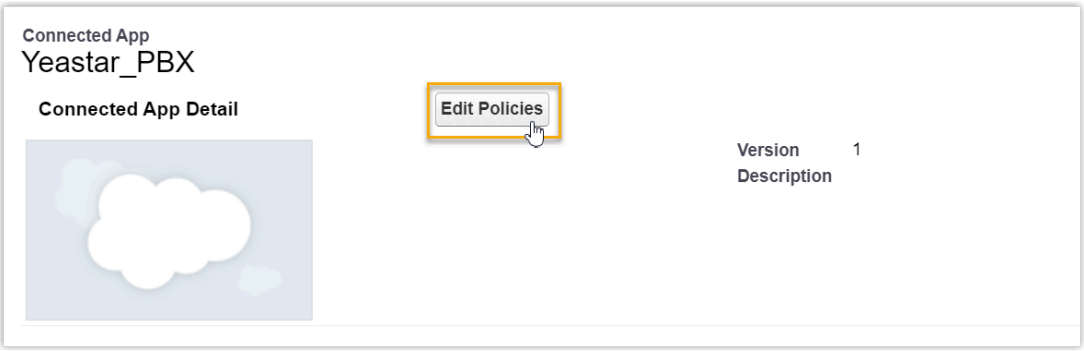
d. Click **Continue**.

5. Grant the application access permission for all Salesforce users related to this Salesforce organization.

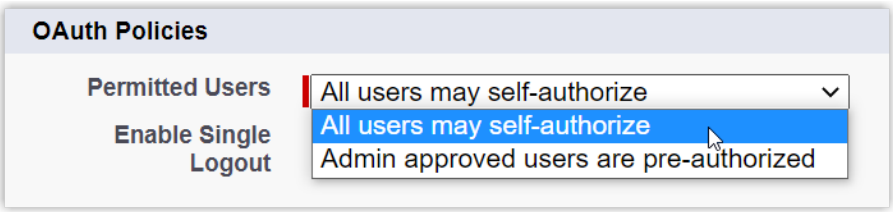
a. Go to **PLATFORM TOOLS > Apps > App Manager**, click beside the new connected application, then click **Manage**.



b. In the detail information page of the application, click **Edit Policies**.



c. Scroll down to the **OAuth Policies**, select **All users may self-authorize** from the drop-down list of **Permitted Users**.

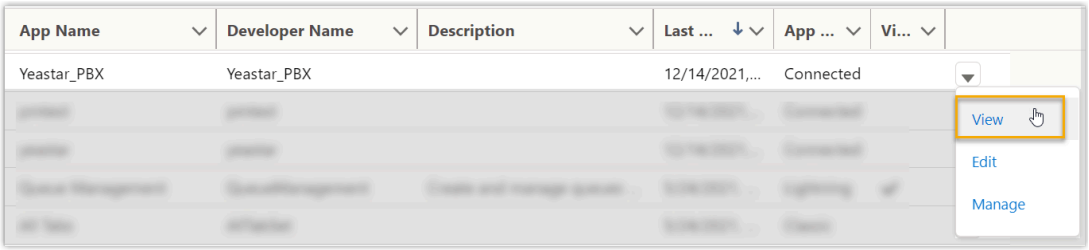


d. Click **Save**.

All Salesforce users related to this Salesforce organization can use the application.

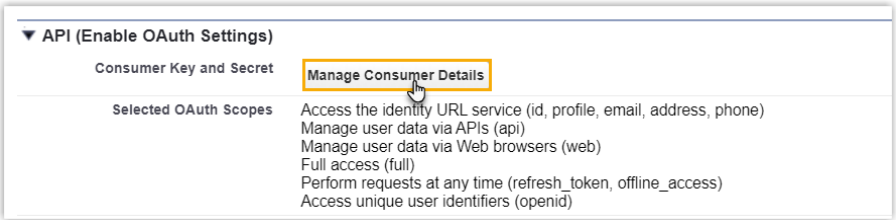
6. Obtain the Authorization information of Salesforce CRM as you will use it later on PBX.

a. Go to **PLATFORM TOOLS > Apps > App Manager**, click beside the new connected application, then click **View**.



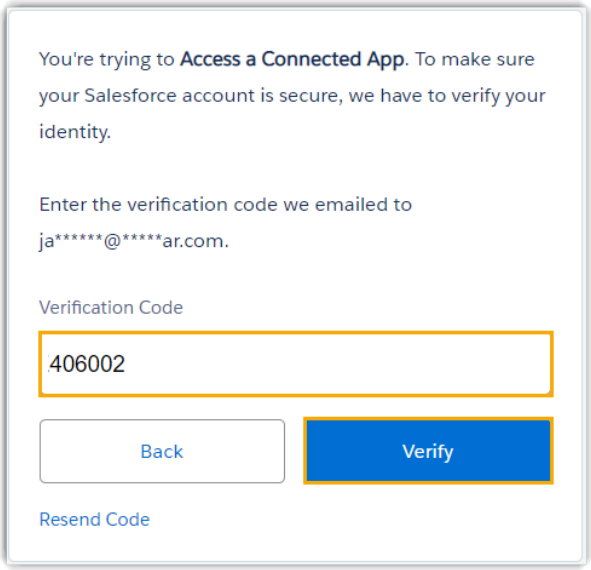
b. Scroll down to **API (Enable OAuth Settings)** section, obtain the API Authorization information.

i. In the **Consumer Key and Secret** field, click **Manage Consumer Details**.

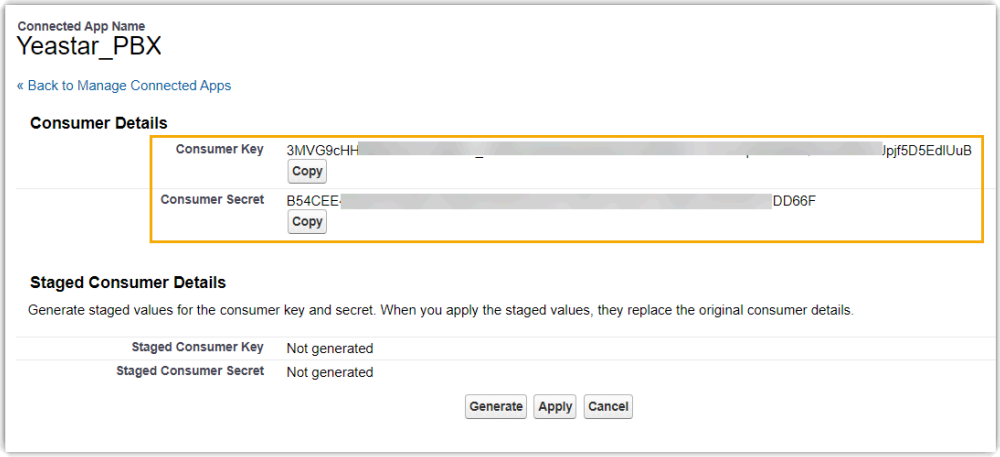


A verification code is sent to your mailbox.

ii. Enter the verification code, then click **Verify**.

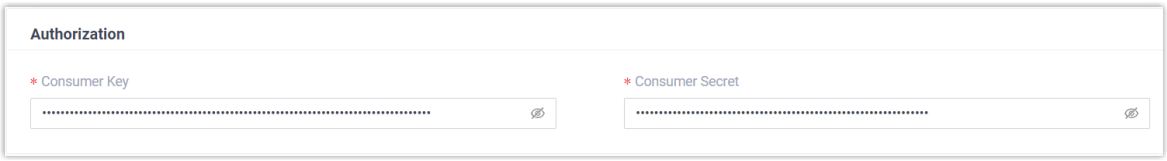


iii. In the **Consumer Details** section, note down the **Consumer Key** and **Consumer Secret**.



Step 3. Make Authorization Request to Salesforce CRM

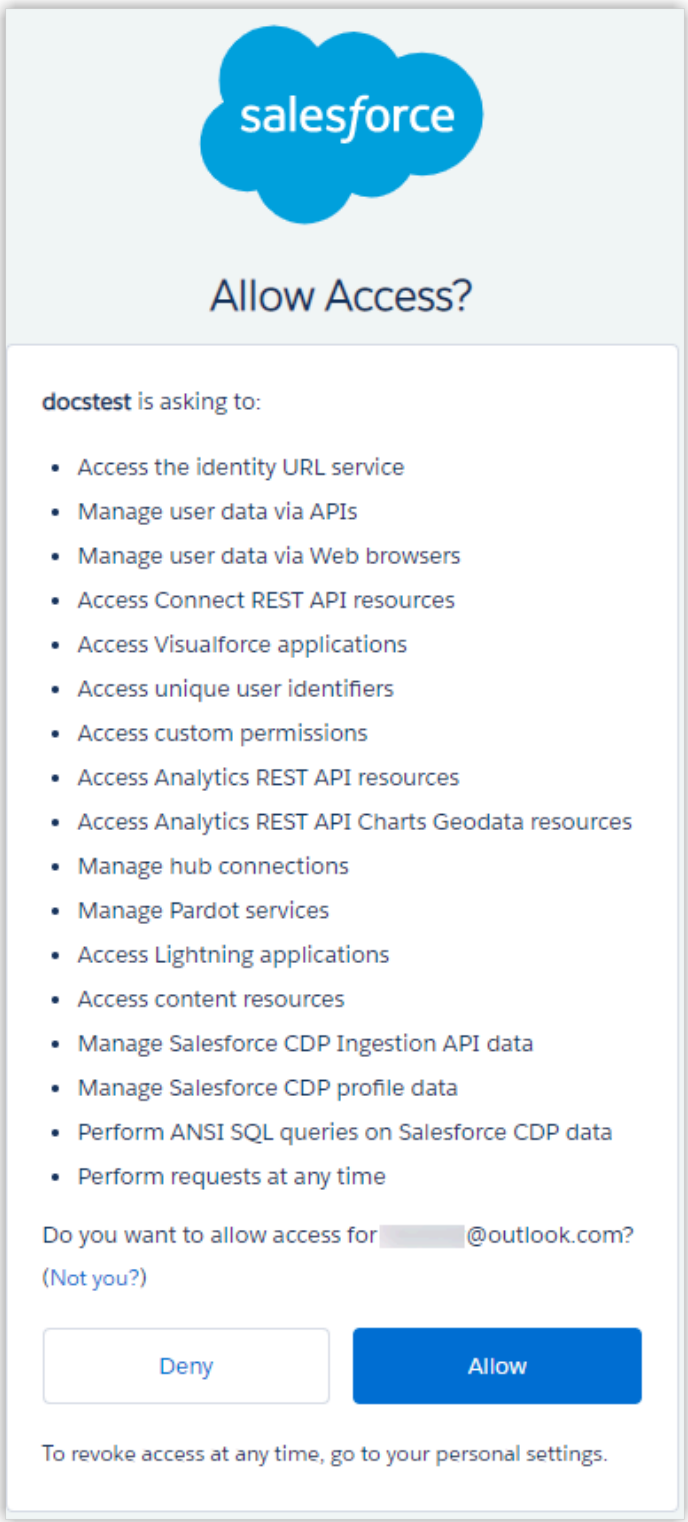
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. Click **Salesforce**.
3. In the **Authorization** section, enter the API authorization information.



- **Consumer Key**: Paste the Salesforce API Consumer Key.
- **Consumer Secret**: Paste the Salesforce API Consumer Secret.

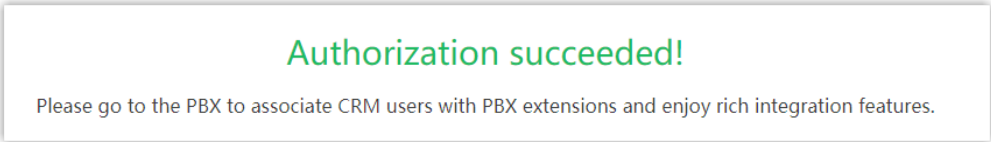
4. Click **Save**.

   A new browser page will be launched to request for Salesforce CRM data access permission.

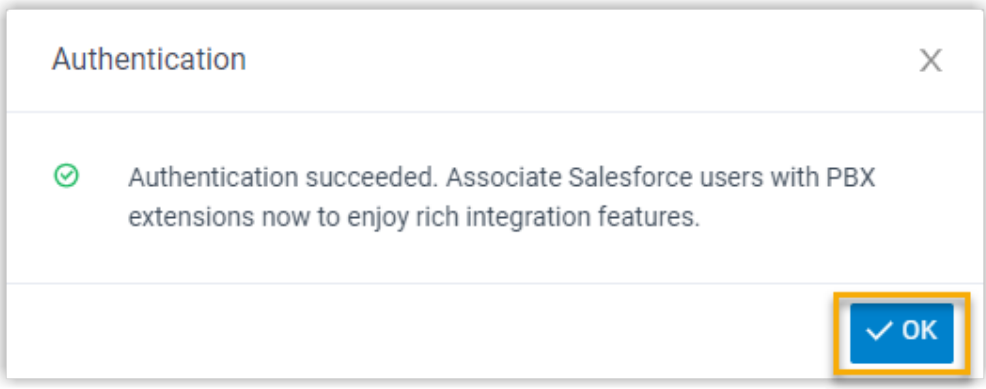


5. Click **Allow** to allow the PBX to access data in your CRM account.

   If the authorization succeeds, the web page will display **Authorization succeeded!**.



On the PBX configuration page, a pop-up window displays the authentication result.

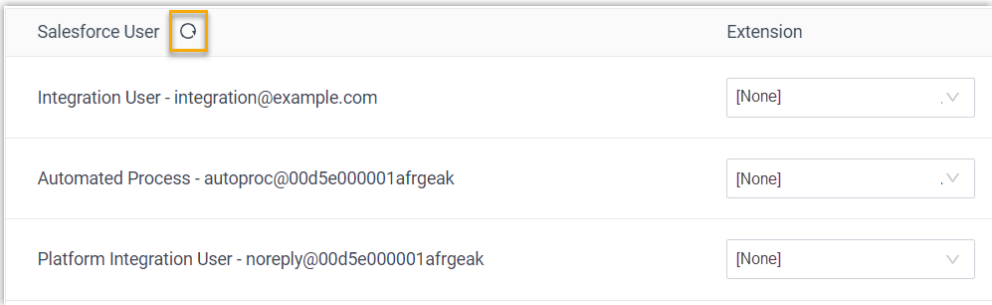


6. Click **OK** to confirm.

   The **Status** field displays **Connected**, indicating that the Salesforce CRM integration is successfully set up.

Step 4. Associate Salesforce CRM users with PBX extensions

1. On the CRM integration page, click beside the **Salesforce User** to synchronize the latest list of Salesforce CRM users.



2. Associate the Salesforce users with PBX extensions.

   ### Associate automatically

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

   a. Click the **Associate Automatically** button.

b. On the pop-up window, click **OK**.
c. Click **Save**.

Associate manually

If the user binds different email addresses to their Salesforce account and PBX extension, you need to manually associate the user's Salesforce user account and PBX extension.

a. In the **Extension** drop-down list beside the Salesforce user, select the desired user's extension.
b. Click **Save**.

Result

- The integration of Yeastar P-Series Cloud Edition and Salesforce CRM is set up.
- Salesforce users can make or receive calls with their PBX extensions.

What to do next

- Set up Contact Synchronization from Salesforce CRM
- Set up Automatic Lead or Contact Creation for Salesforce CRM
- Use Salesforce CRM Integration

Set up Contact Synchronization from Salesforce CRM

After integrate with Salesforce CRM, you can enable a one-way contact synchronization on PBX to sync the Salesforce CRM Contacts to a specific PBX phonebook.

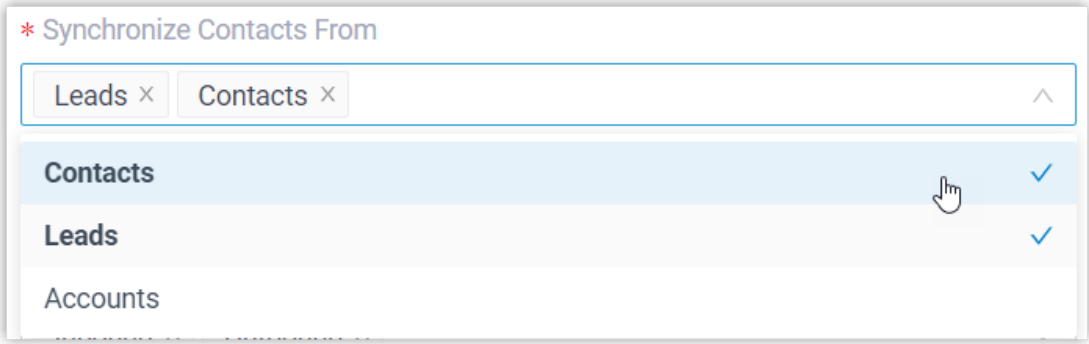
Prerequisites

The Salesforce CRM integration is completed.

Procedure

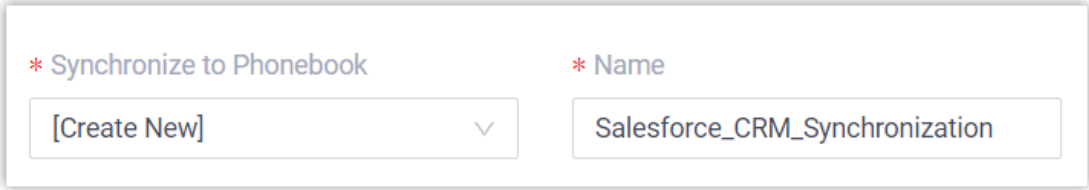
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, select the checkbox of **Synchronize Contacts Automatically**.

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



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 Salesforce CRM.

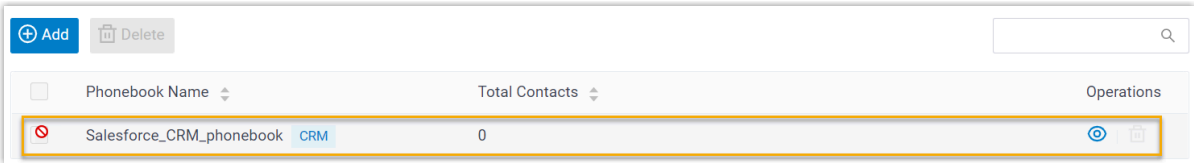
> **Note:**
> The contacts can only be synchronized to an empty phonebook.



5. Click **Save**.

Result

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



When users receive an inbound call from a specified type of Salesforce CRM contact, the contact information will be synchronized to the associated phonebook in Yeastar P-Series Cloud Edition automatically.

> **Note:**

This is a one-way sync to Yeastar P-Series Cloud Edition, therefore the associated phonebook and the synced contacts are read-only.

Troubleshooting:
Why does the PBX create a new contact on an inbound call when the contact already exists in Salesforce CRM?

Set up Automatic Lead or Contact Creation for Salesforce CRM

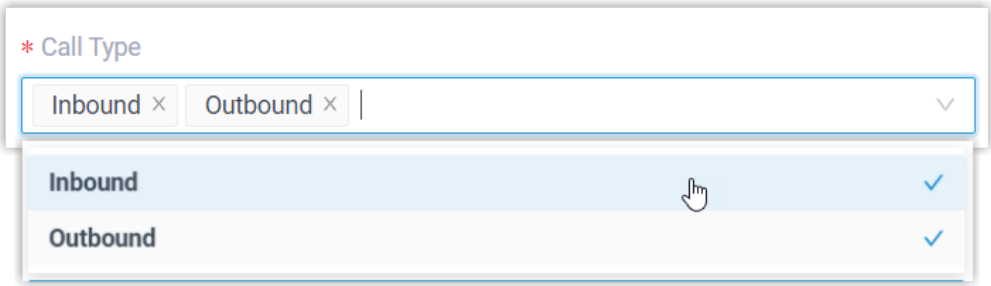
After the integration with Salesforce CRM, you can set up automatic lead or contact creation. If enabled, a new contact or lead will be created on the CRM when the user receives a call from an unknown number or places a call to an unknown number. This feature helps you to build your contact database efficiently and ensure all contact information is captured.

Prerequisites

The Salesforce CRM integration is completed.

Procedure

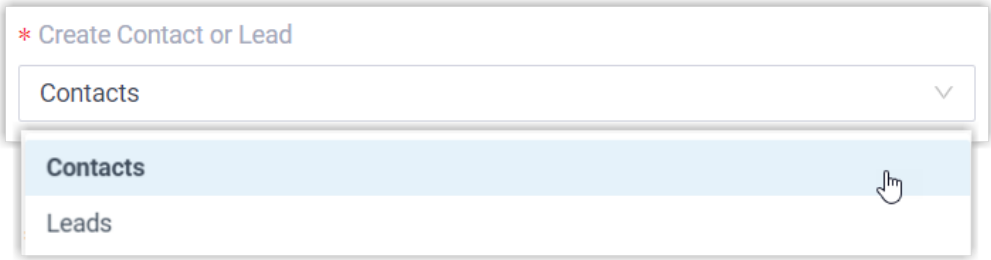
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, select the checkbox of the **Create New Contact Automatically**.
3. In the **Call Type** drop-down list, select when will a contact be automatically created on Salesforce CRM.



- **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.

4. In **Create Contact or Lead** drop-down list, select the type(s) of contacts to be created.

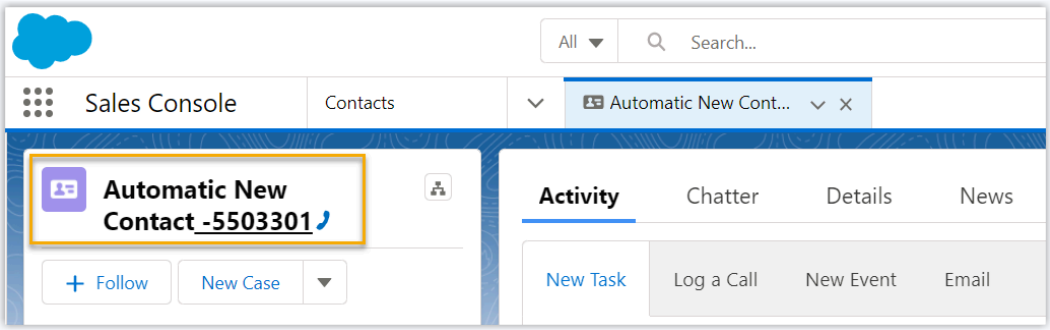


- **Contacts**: Save the unknown number as a Contact.
- **Leads**: Save the unknown number as a Lead.

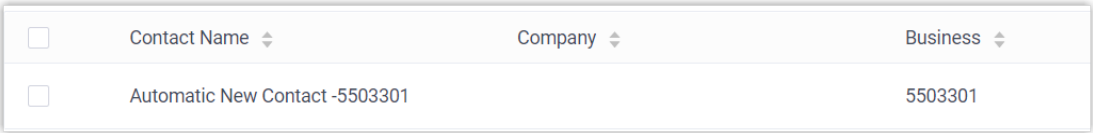
5. Click **Save**.

Result

- When a call is placed to an unknown number, or a call is received from an unknown number, a new contact or lead will be created on Salesforce CRM.

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

- If the Contact Synchronization feature is enabled, the new created contact or lead will also be synchronized automatically into the phonebook in Yeastar P-Series Cloud Edition.



Use Salesforce CRM Integration

The integration with Salesforce CRM supports various features for your business dealings, bringing great convenience and efficiency. This topic shows the usage of the key features.

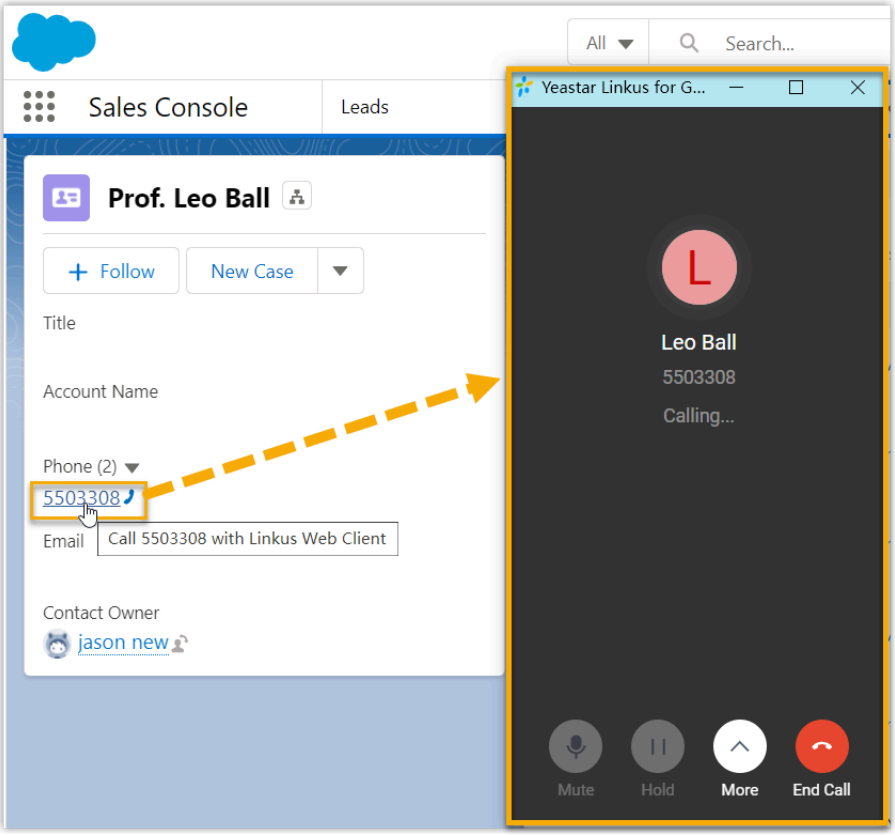
Click to Call

Prerequisites

Install 'Yeastar Linkus for Google' Chrome extension and set up Linkus Web Client with the Chrome extension.

Procedure

Users can click on the detected phone numbers on the Salesforce CRM web page, a call is then sent out directly via the associated PBX extension.



Call Popup

Prerequisites

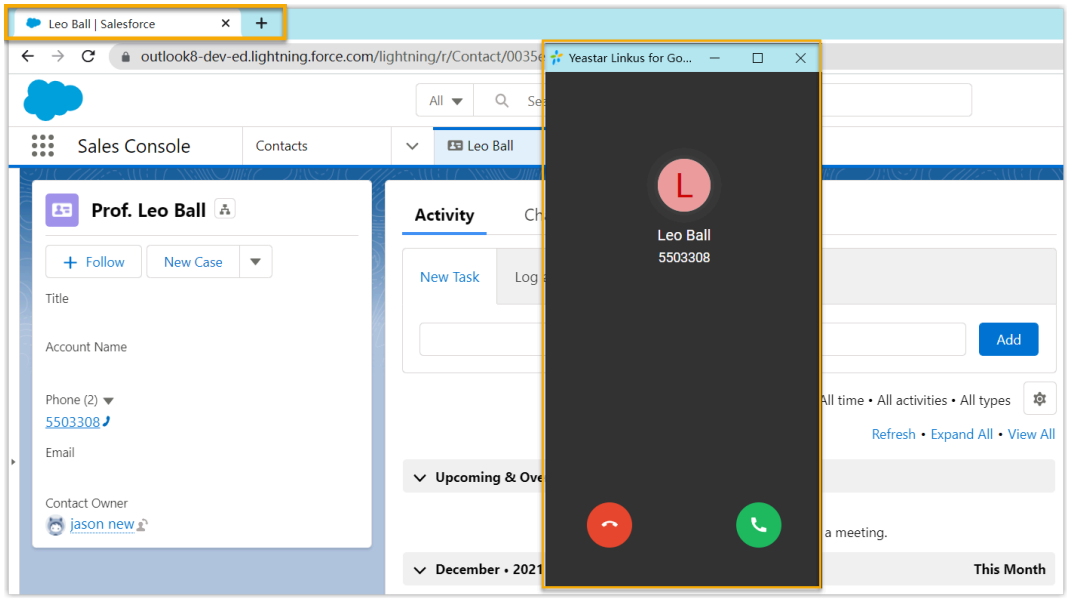
Keep at least one of the following clients logged in:

- Linkus Desktop Client
- Linkus Web Client

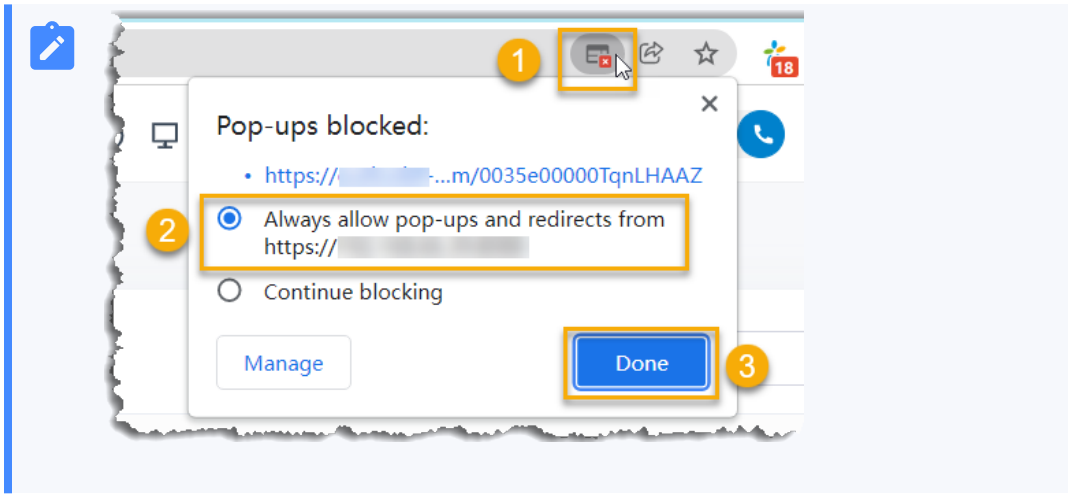
> **Note:**
> If users close web browser or Linkus Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension 'Yeastar Linkus for Google', which allows for the call pop-up browser tab even when web browser is closed.

Procedure

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



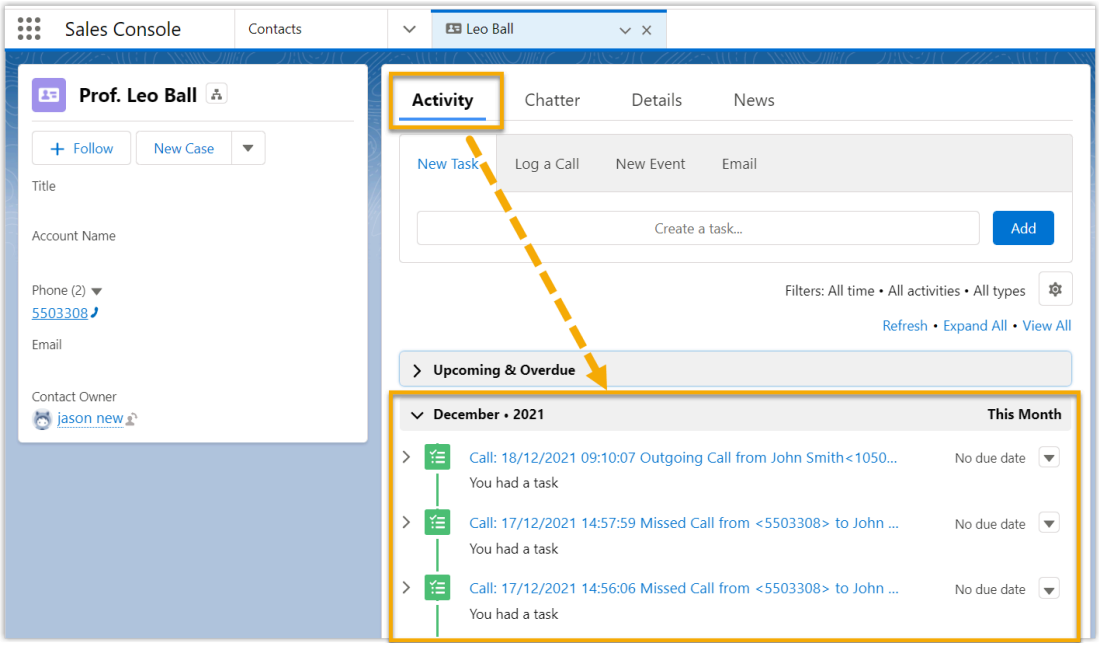
> **Note:**
> The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**.



Call Journal

After the Salesforce CRM integration, all outbound calls, incoming calls, and missed call records will be logged to CRM automatically, which helps users to keep track of every conversation.

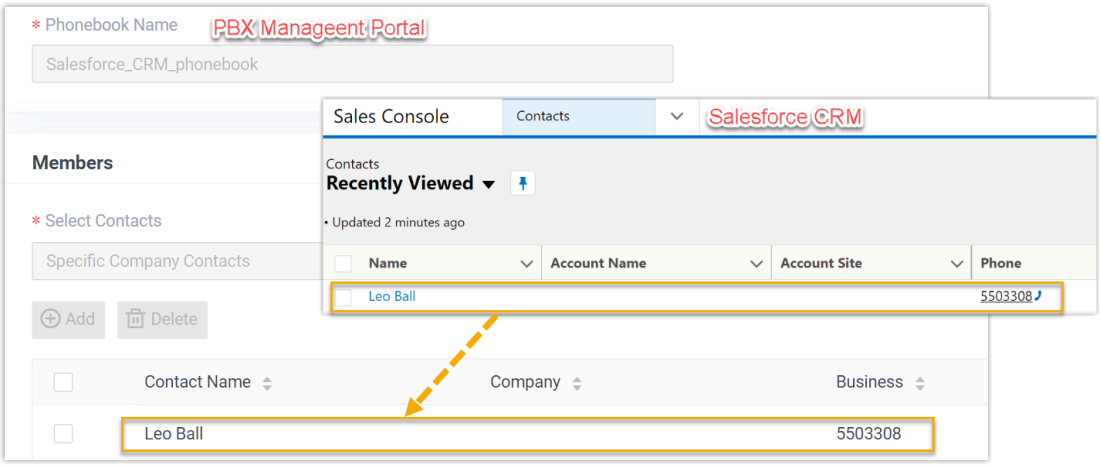
Users can log in to the Salesforce CRM, go to the **Activity** tab in a contact detail page to view the call logs.



Contact Synchronization

Inbound calls from Salesforce contacts trigger a CRM contact lookup. If there exists the same number in CRM, the matched Salesforce CRM contact will be synchronized to an associated PBX phonebook, and the synchronized contacts are read-only.

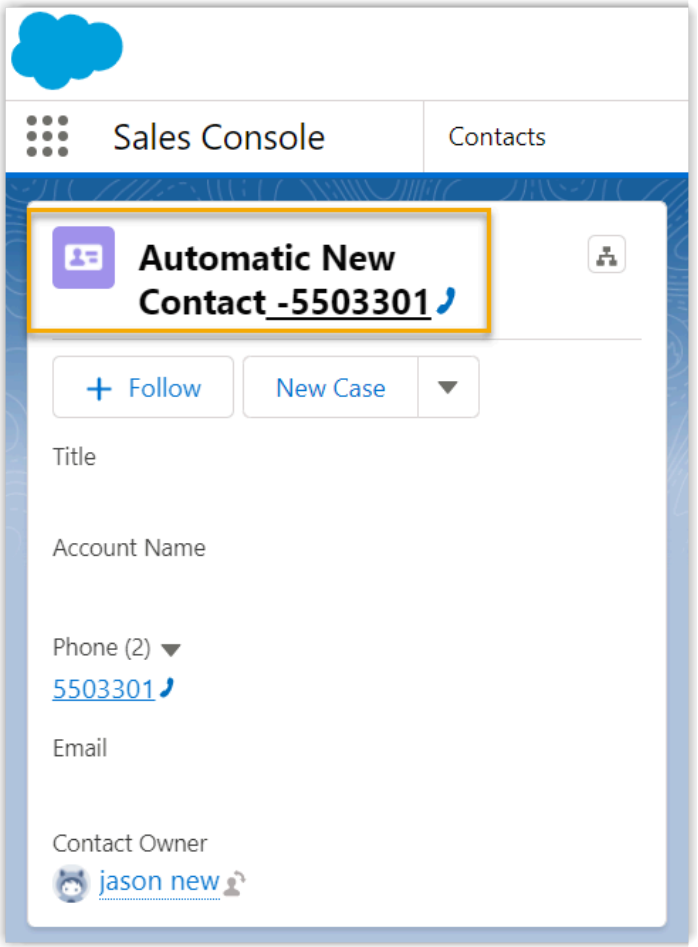
For more information, see Set up Contact Synchronization from Salesforce CRM.



Automatic Contact or Lead Creation

A new contact or lead will be created automatically in CRM when the Salesforce user receives a call from an unknown number, or when the user makes a call to an unknown number.

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

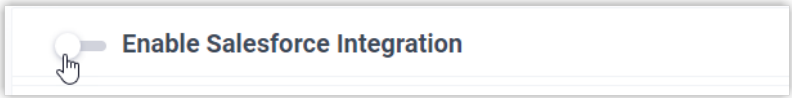

Sales Console
Contacts
Automatic New Contact -5503301
Follow
New Case
Title
Account Name
Phone (2)
5503301
Email
Contact Owner
jason new

Disable Salesforce CRM Integration

You can disable the Salesforce CRM integration on Yeastar P-Series Cloud Edition 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 Salesforce Integration** switch on the top.



3. Click **Save**.

Result

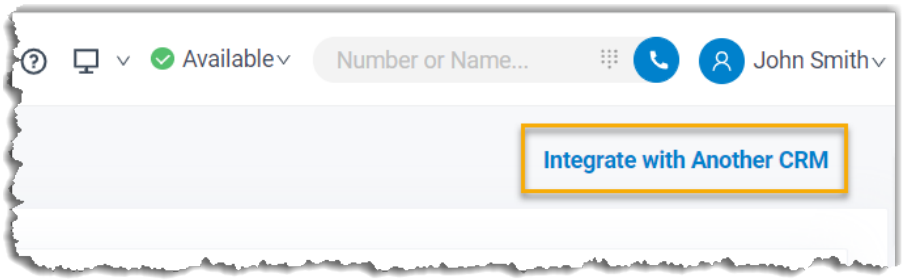
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time the integration is enabled again.

Disconnect Salesforce 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. Click **Integrate with Another CRM** in the top-right corner.



3. Click **OK** in the pop-up window.

Result

- The Salesforce 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.