

# Salesforce CRM Integration Guide

**Yeastar P-Series Cloud Edition** 

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# 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 <u>'Yeastar Linkus for Google</u>' 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.

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 re- ceive 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 fol- low 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 deal- ings. You may have multiple contacts stored in the same account.

#### Table 1.

#### **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
- Step 2. Create and configure an application on Salesforce CRM
- Step 3. Make Authorization Request to Salesforce CRM
- <u>Step 4. Associate Salesforce CRM users with PBX extensions</u>

#### Step 1. Get PBX authentication information

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

ntegrations / CRM				
	CRM			User Guide
	The CRM Integration is designed to the integration in minutes with a siconvenience and efficiency.	o facilitate quick integration bet tep-by-step configuration wizar	ween your Yeastar PBX and CRM. d and exply rich integration feature	account. Complete s that bring
	HubSpot	Salesforce	Zobo	Ditriv24

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



# Step 2. Create and configure an application on Salesforce CRM

- 1. Log in to <u>Salesforce CRM</u>.
- 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.

formation	
Connected App Name	Yeastar_PBX
API Name	Yeastar_PBX
Contact Email	example@yeastar.com
Contact Phone	
Logo Image URL 😡	
Icon URL®	Upload logo image or Choose one of our sample logos
	Choose one of our sample logos
Info URL	
Description ©	

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.

Enable OAuth Se				
Callback URL ®	https:/// vintegration/caliback/api/crm/salesforce/	2		
elected OAuth Scopes	Available OAuth Scopes			Selected OAuth Scopes
	Access content resources (content)	*		Access the identity URL service (id, profile, email, address, phone) + Access unique user identifiers (openid)
	Access the Salesforce API Platform (sfap_api)		Add	Full access (full)
	Manage Data Cloud Calculated Insight data (cdp_calculated_insight_a	api)		Manage user data via APIs (api)
	Manage Data Cloud Identity Resolution (cdp_identityresolution_api)			Manage user data via Web browsers (web)
	Manage Data Cloud Ingestion API data (cdp_ingest_api)		Remove	Perform requests at any time (refresh_token, offline_access)
	Manage Data Cloud profile data (cdp_profile_api)			
	Perform ANSI SOL queries on Data Cloud data (cdp. query, api)			
	Perform segmentation on Data Cloud data (cdp_qdcfy_dp)	*		
	Perform segmentation on Data Cloud data (cdp_query_api)	*		

- 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**.

App Name 🗸	Developer Name 🗸 🗸	Description $\checkmark$	Last Modifie ↓∨	App 🗸 Vi 🗸
Yeastar_PBX	Yeastar_PBX		12/14/2021, 6:04 PM	Connected
				View
				Edit
				Manage J

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 seide 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 De-tails**.

▼ API (Enable OAuth Settings)	
Consumer Key and Secret	Manage Consumer Details
Selected OAuth Scopes	Access the identity URL service (id, profile, email, address, phone) Manage user data via APIs (api) Manage user data via Web browsers (web) Full access (full) Perform requests at any time (refresh_token, offline_access) Access unique user identifiers (openid)

A verification code is sent to your mailbox.

ii. Enter the verification code, then click Verify.

Verder to the Area of Comm	ated Ann. To solve some			
You're trying to Access a Conne	ected App. To make sure			
your Salesforce account is secu	re, we have to verify your			
identity.				
Enter the verification code we	emailed to			
ja*****@*****ar.com.				
Verification Code				
406002				
Back	Verify			
	,			
Resend Code				
RESELUCIONE -				

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

Connected App Name Yeastar_PB	х			
« Back to Manage Co	onnected Apps			
Consumer Deta	ails			
	Consumer Key	3MVG9cHH Copy		Jpjf5D5EdlUuB
	Consumer Secret	B54CEE Copy	DD66F	
Staged Consun	ner Details			
Generate staged va	lues for the consume	r key and secret. When you	apply the staged values, they replace the original consumer details.	
Sta	aged Consumer Key	Not generated		
Stage	ed Consumer Secret	Not generated	Generate Apply Cancel	

# 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.

Authorization			
* Consumer Key		* Consumer Secret	
	Ø		ø

- 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!.

# Authorization succeeded!

Please go to the PBX to associate CRM users with PBX extensions and enjoy rich integration features.

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  ${f C}$  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

- <u>Set up Contact Synchronization from Salesforce CRM</u>
- <u>Set up Automatic Lead or Contact Creation for Salesforce CRM</u>
- 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.

* Synchronize Contacts From		
Leads × Contacts ×		~
Contacts	լով	~
Leads	U	$\checkmark$
Accounts		

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 synchi	ronized to an empty phonebook.
* Synchronize to Phonebook [Create New]	* Name Salesforce_CRM_Synchronization

5. Click Save.

# Result

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

Œ	Add			Q		
		Phonebook Name 🍦	Total Contacts 🍦	Operations		
	0	Salesforce_CRM_phonebook CRM	0	<b>◎</b>   茴		

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.



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 Auto**matically.
- 3. In the **Call Type** drop-down list, select when will a contact be automatically created on Salesforce CRM.

* Call Type						
Inbound × Outbound ×		$\sim$				
Inbound	ζ <sup>h</sup> ŋ	~				
Outbound	Ũ	~				

• **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.

* Create Contact or Lead						
Contacts	~					
Contacts	լիդ					
Leads	U					

- **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.

-		All ▼   Q   Search     ✓   Image: Automatic New Cont   ✓				
Sales Console	Contacts	~	🖪 Auto	omatic New Cont.	v x	
Automatic New	,	A	ctivity	Chatter	Details	News
+ Follow New Case	•	N	lew Task	Log a Call	New Event	Email

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

Contact Name 👙	Company 🌲	Business 🌲
Automatic New Contact -5503301		5503301

# **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 <u>'Yeastar Linkus for Google'</u> 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 <u>'Yeastar Linkus for Google</u>', which allows for the call popup 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:

ľ

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**.

2 🖵	Pop-ups blocked:
	https://m/0035e00000TqnLHAAZ
2	Always allow pop-ups and redirects from https://
-7	O Continue blocking
ł	Manage Done 3
Sam	and a second the same of the second

# **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.

Salesforce_CRM_phonebook						
	Sales Console	Contacts	~	Salesforce CRM		
Members	Contacts Recently Viewed					
Select Contacts	• Updated 2 minutes ago					
Specific Company Contacts	Name	✓ Account Name		✓ Account Site	$\sim$	Phone
🕀 Add 🛅 Delete	Leo Ball					5503308
Contact Name 🌲		Company 🌲		Business 🌲		

# **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	Cor	ntacts	
Automatic New Contact <u>-5503301</u>	<u></u> ,		A
+ Follow New Case	•		
Account Name Phone (2) 💌			
5503301			
Contact Owner			

# **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.