Salesforce CRM Integration Guide

Yeastar P-Series Software Edition

Version: 1.0
Date: 2025-12-08

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Contents

About This Guide

Yeastar P-Series Software 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 Software 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: 83.21.0.66 or later

Key features

The integration of Yeastar P-Series Software 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 / 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 Salesforce CRM when a user ends calls with CRM contacts.

Call Recording Playback

Users can view and play call recordings stored on the PBX from the corresponding call log directly within the CRM system.

Contact Synchronization

Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from / or initiating outbound calls to Salesforce CRM contacts.

Contact or Lead Creation

A new contact or lead can be automatically or manually created in CRM for unknown inbound 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 Software Edition with Salesforce CRM
- Set up Contact Synchronization from Salesforce CRM
- Set up Lead or Contact Creation for Salesforce CRM
- Set up Call Popup
- Use Salesforce CRM Integration
- Disable Salesforce CRM Integration
- Disconnect Salesforce CRM Integration

Set up Salesforce CRM Integration

Integrate Yeastar P-Series Software Edition with Salesforce CRM

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

Prerequisites

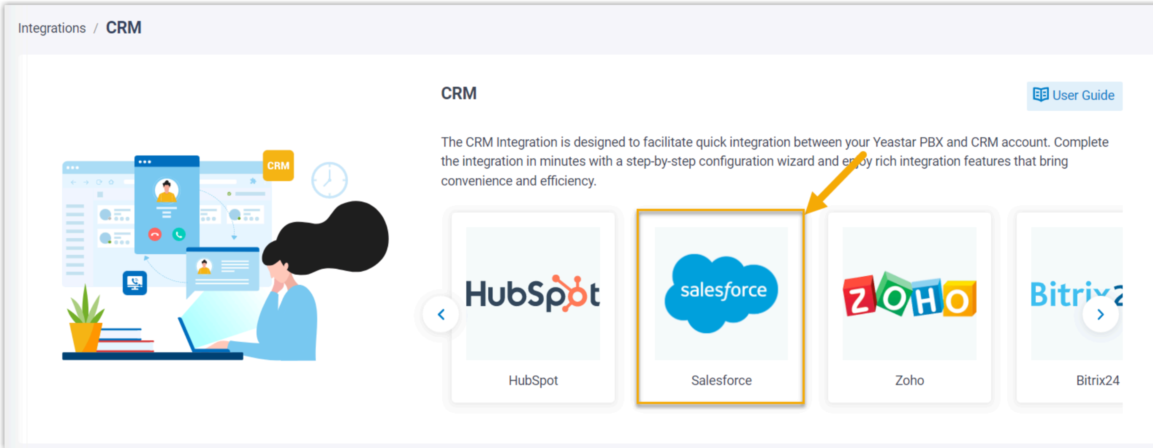
- Make sure that the PBX can be remotely accessed via domain name.
  For more information about the configuration, see the following topics:
    - Configure Network for Remote Access by a Yeastar FQDN
    - Configure Network for Remote Access by a Yeastar Domain Name
    - Configure Network for Remote Access by a Domain Name
- Only a system administrator of a Salesforce CRM account can enable the Salesforce CRM integration.

Procedure

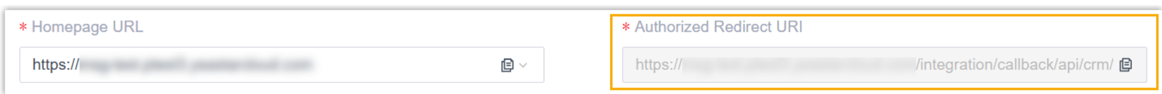
- Step 1. Get PBX authentication information
- Step 2. Create and configure an application on Salesforce CRM
- Step 3. Make Authorization Request to Salesforce CRM
- Step 4. Associate Salesforce CRM users with PBX extensions

Step 1. Get PBX authentication information

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

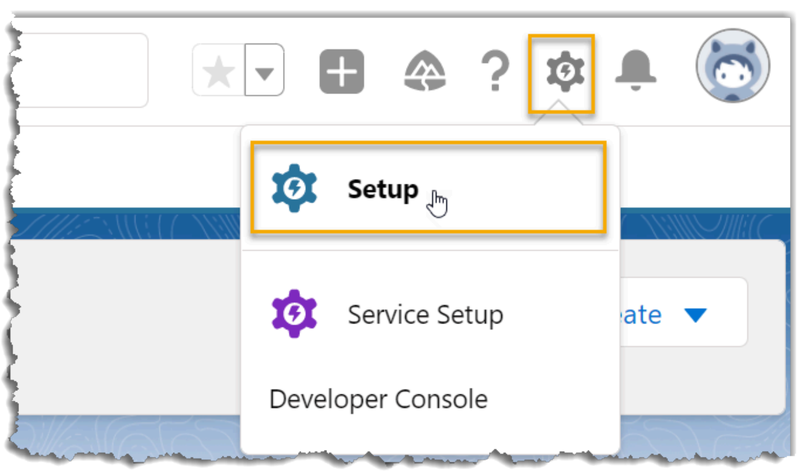


3. In the **Network** section, select the desired **Homepage URL** and note down the **Authorized Redirect URI** as you will use it later on Salesforce CRM.



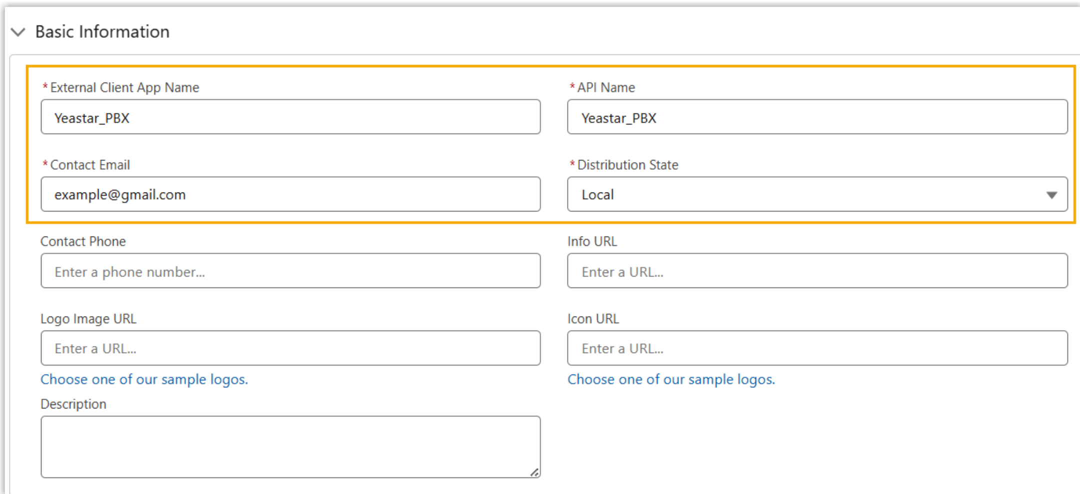
Step 2. Create and configure an application on Salesforce CRM

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 External Client App** to create a new application for integration.

a. In the **Basic Information** section, enter the required information, then complete the rest as needed.

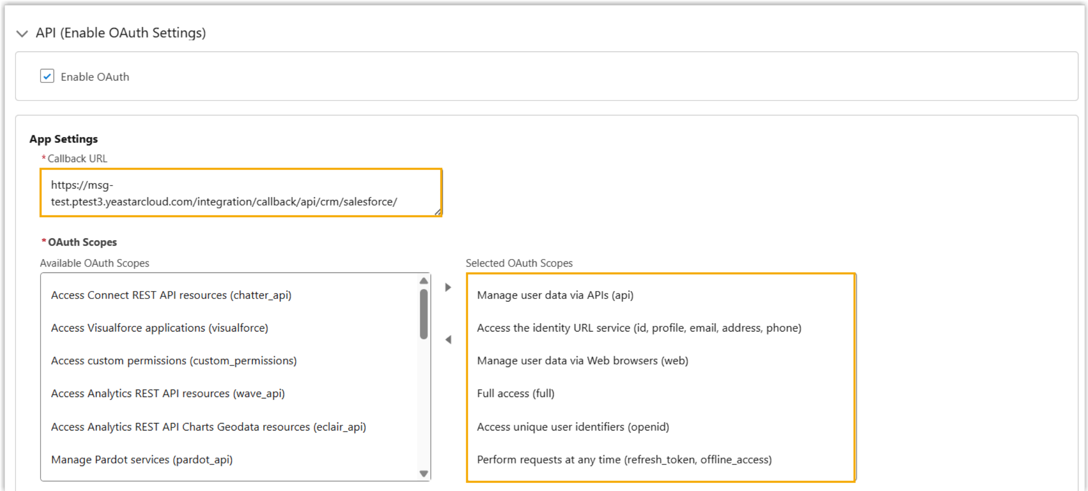


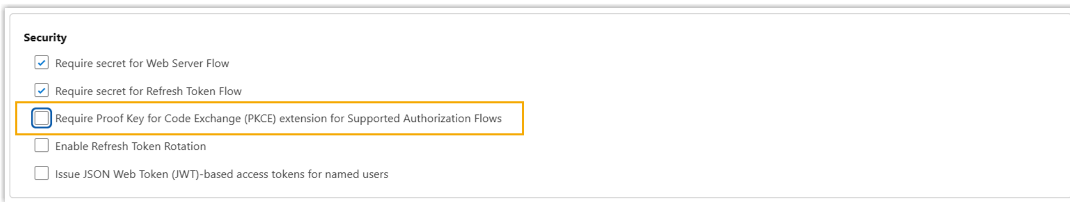
- **External Client App Name**: Enter a name to help you identify the application.

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

- **Contact Email**: Enter a contact email address.
- **Distribution State**: Retain the default setting.

b. In the **API (Enable OAuth Settings)** section, select the checkbox of **Enable OAuth**, and complete the API configuration.





Setting	Description
App Settings section	
Callback URL	Paste [the authorized redirect URI obtained from the PBX web portal]().
OAuth Scopes	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)
Security section	
Require Proof Key for Code Exchange (PKCE) extension for Supported Authorization Flows	Unselect the checkbox of this setting.

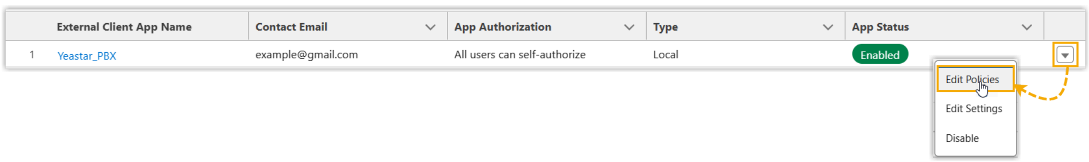
c. At the bottom of the page, click **Save**.

The webpage indicates that the application has been successfully created.

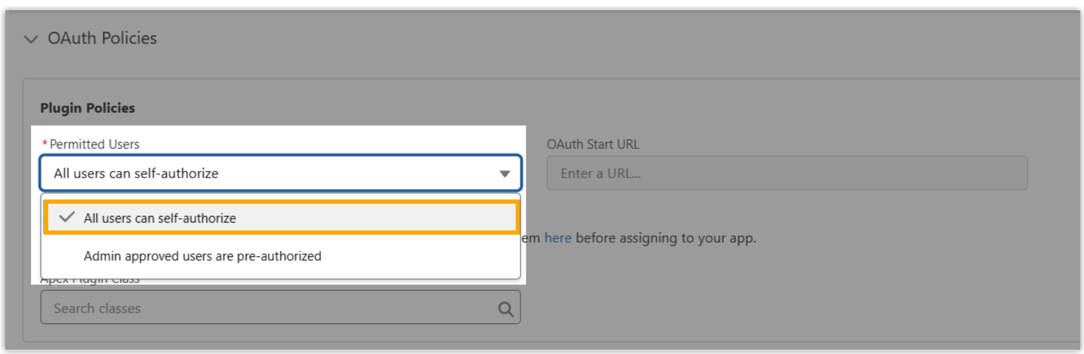
5. Modify the application's access permissions.

   By default, the permission of newly created applications are set to **All users can self-authorize**, granting access to all associated Salesforce users in the organization. If the current settings displayed in the application list differ from this, do as follows to modify the permission.

   a. Go to **Apps > External Client App > External Client App Manager**, click beside the new application, then click **Edit Policies**.

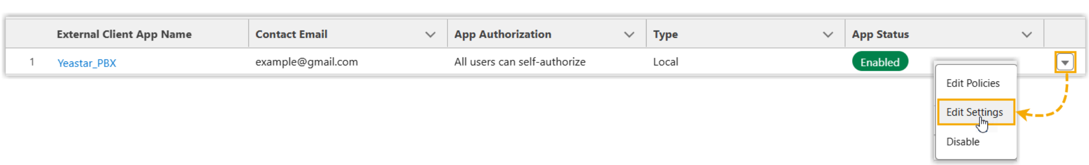
   b. Scroll down to the **OAuth Policies**, select **All users may self-authorize** from the drop-down list of **Permitted Users**.

   c. Click **Save**.

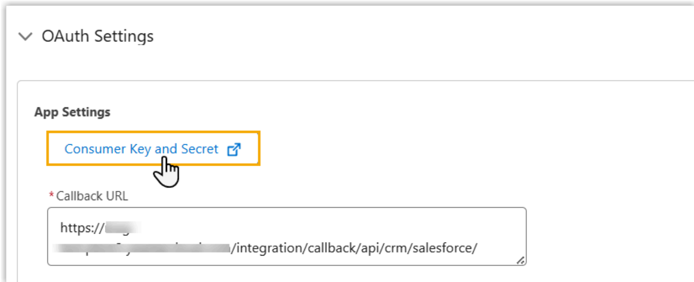
6. Obtain the Authorization information of Salesforce CRM as you will use it later on PBX.

   a. Go to **Apps > External Client App > External Client App Manager**, click beside the new application, then click **Edit Settings**.

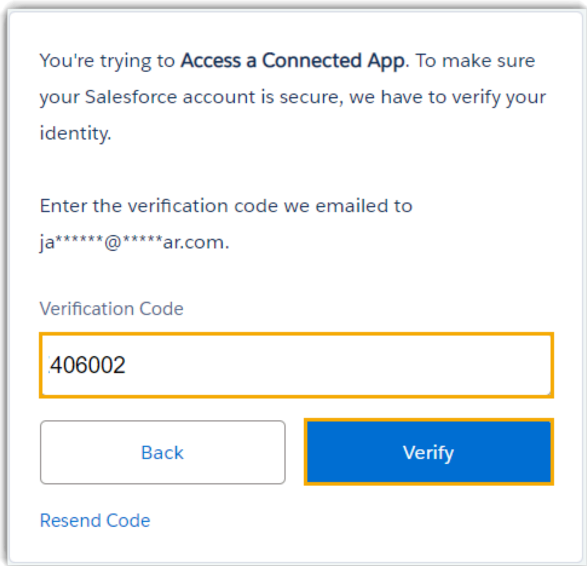
   b. In the **OAuth Settings** section, obtain the API Authorization information.

      i. Click **Consumer Key and Secret**.

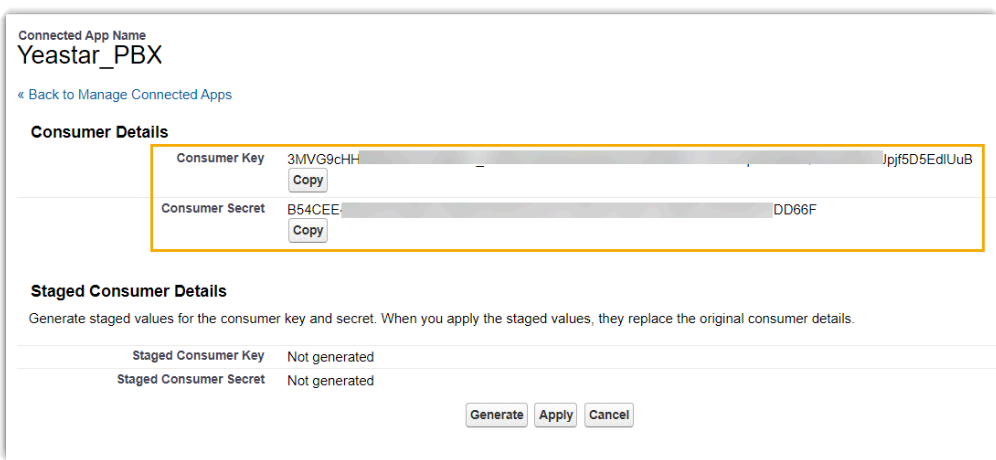


A verification code is sent to your mailbox.

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

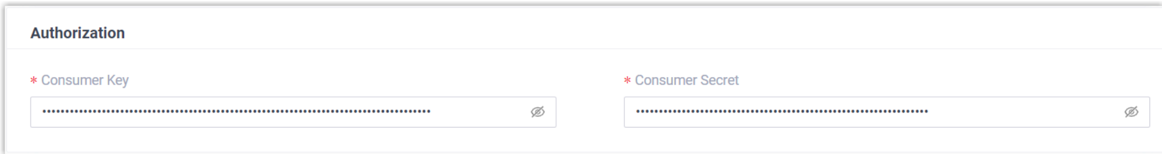


iii. In the **Consumer Details** section, note down the **Consumer Key** and **Consumer Secret**.



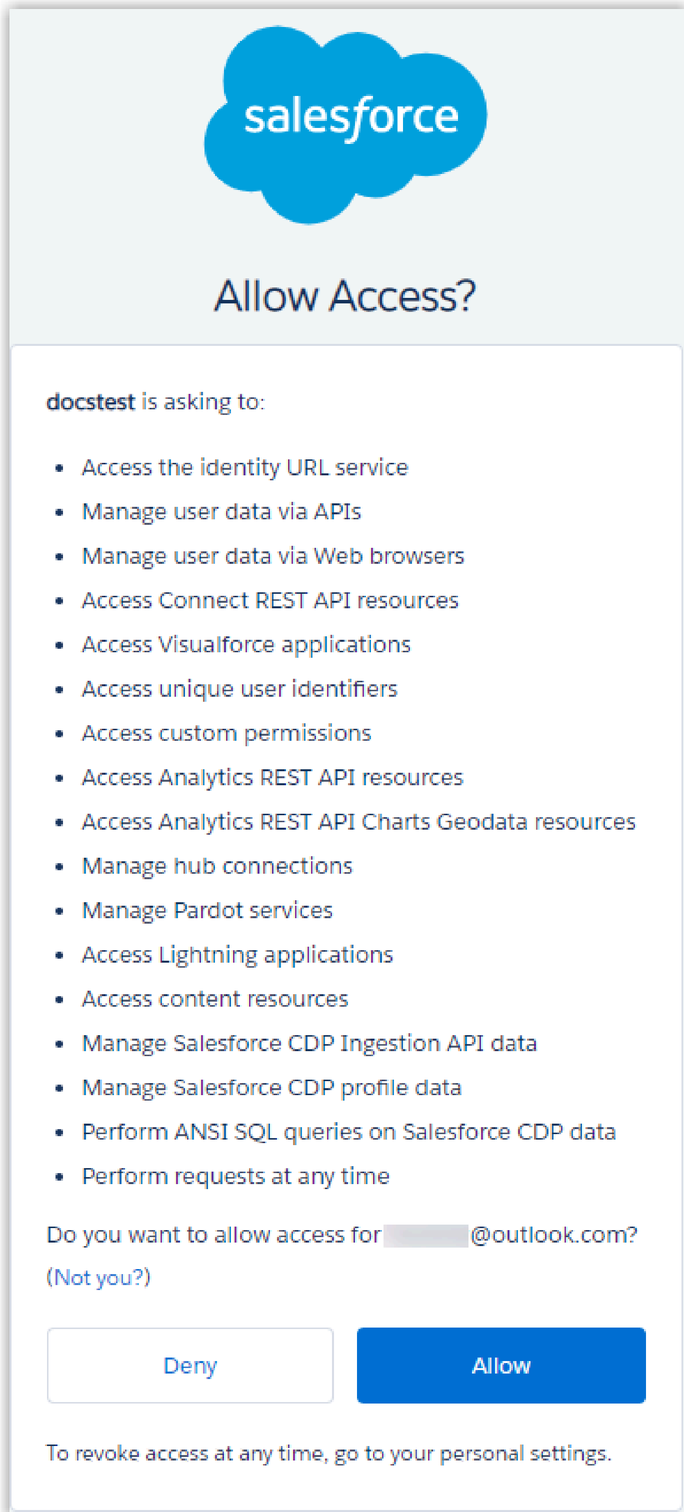
Step 3. Make Authorization Request to Salesforce CRM

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



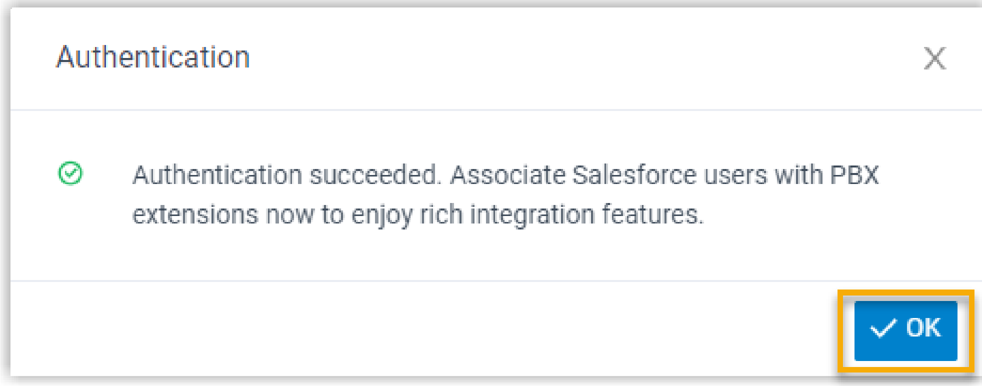
    - **Consumer Key**: Paste the Salesforce API Consumer Key.
    - **Consumer Secret**: Paste the Salesforce API Consumer Secret.
4. Click **Save**.

   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.

   You are redirected to the PBX configuration page, a pop-up window displays the authentication result.

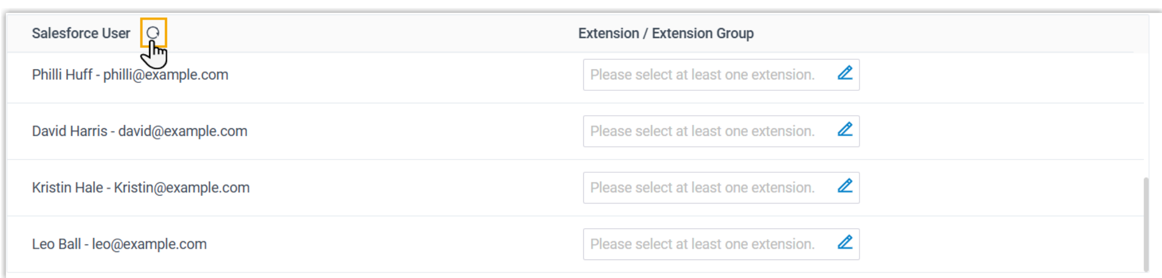


6. Click **OK** to confirm.

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

Step 4. Associate Salesforce CRM users with PBX extensions

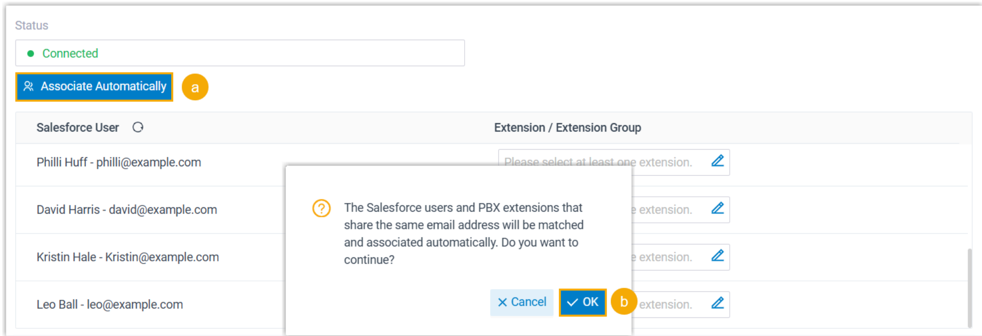
1. On the CRM integration page, click beside the **Salesforce User** to synchronize the latest list of Salesforce CRM users.



2. Associate the Salesforce users with PBX extensions.

   ### Associate automatically

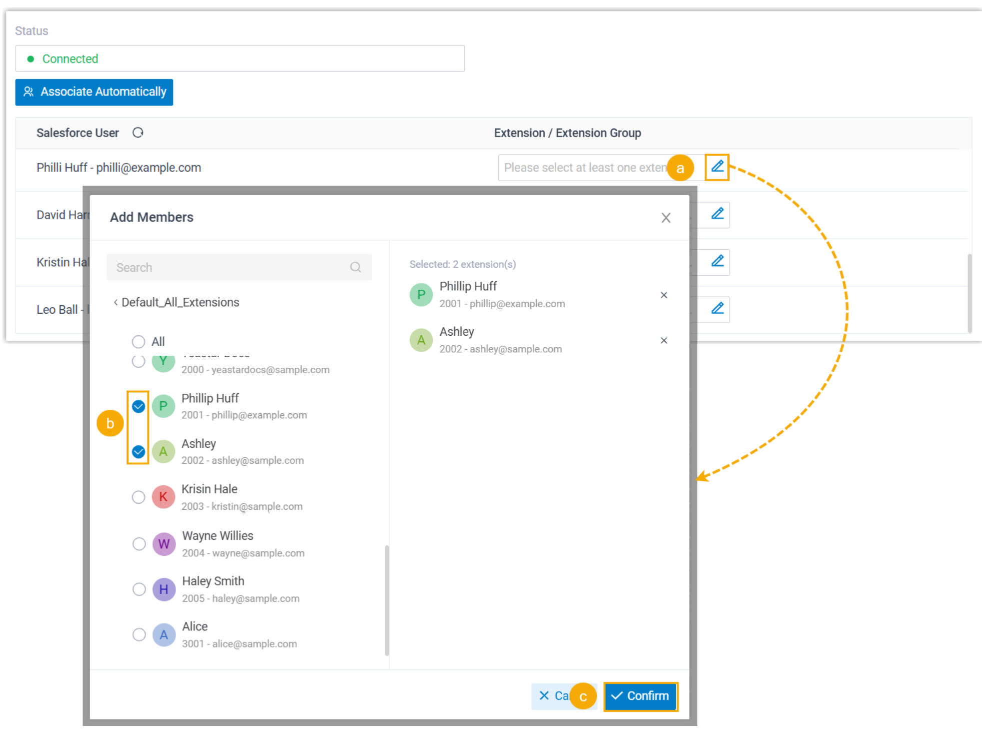
   If users bind the same email address to their Salesforce accounts and PBX extensions, you can implement automatic association of their Salesforce accounts and PBX extensions as follows:



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

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

3. Click **Save**.

Result

- The integration of Yeastar P-Series Software 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 Lead or Contact Creation for Salesforce CRM
- Set up Call Popup
- Use Salesforce CRM Integration

Set up Contact Synchronization from Salesforce CRM

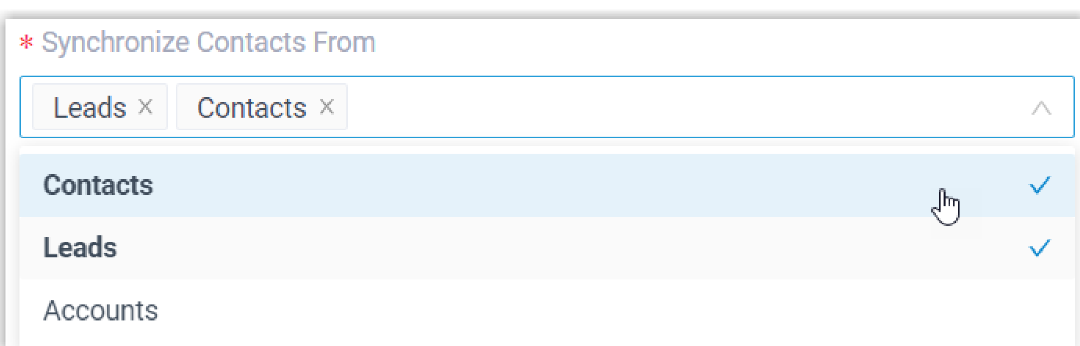
After integrate with Salesforce CRM, you can enable a one-way contact synchronization on PBX to sync the Salesforce CRM Contacts to a specific PBX phonebook.

Prerequisites

The Salesforce CRM integration is completed.

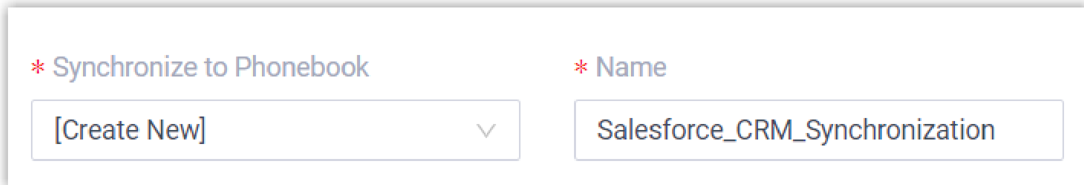
Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Synchronize Contacts Automatically**.
3. In the **Synchronize Contacts From** drop-down list, select the type(s) of contacts to be synchronized from Salesforce CRM.

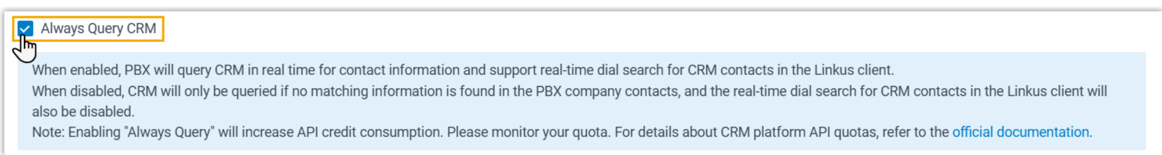


4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from Salesforce CRM.

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



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



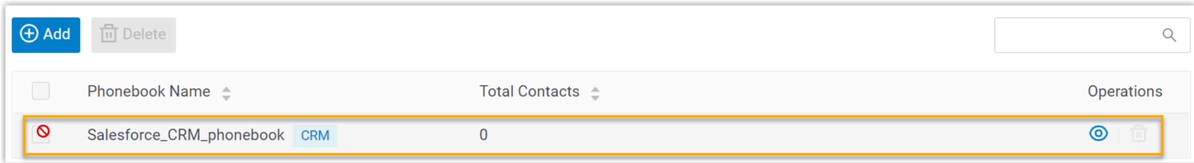
- If enabled, PBX will query CRM in real time for contact information, and support real-time dial search for CRM contacts in the Linkus clients of the associated extension users.
- If disabled, PBX will only query CRM when there is no matching information found in the PBX company contacts.

> **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 .



When users receive an inbound call from a specified type of Salesforce CRM contact, or place an outbound call to the contact, PBX will search for the contact's information, and automatically synchronize the matched contact's information from the CRM to the associated phonebook in Yeastar P-Series Software Edition.

> **Note:**
> This is a one-way sync to Yeastar P-Series Software 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 Lead or Contact Creation for Salesforce CRM

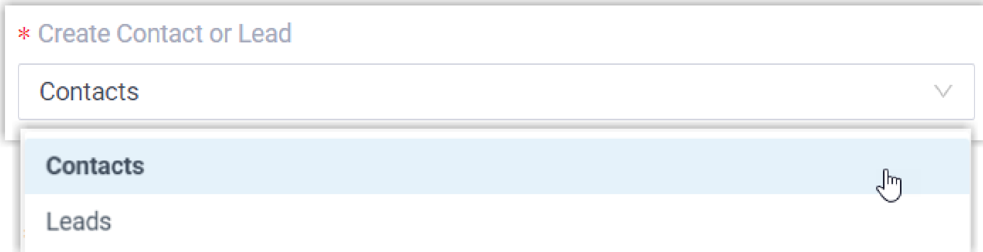
After the integration with Salesforce CRM, you can set up automatic or manual lead or contact creation. If enabled, a new contact or lead can be created on the CRM when the user receives a call from an unknown number or places a call to an unknown number. This feature helps you to build your contact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

Prerequisites

The Salesforce CRM integration is completed.

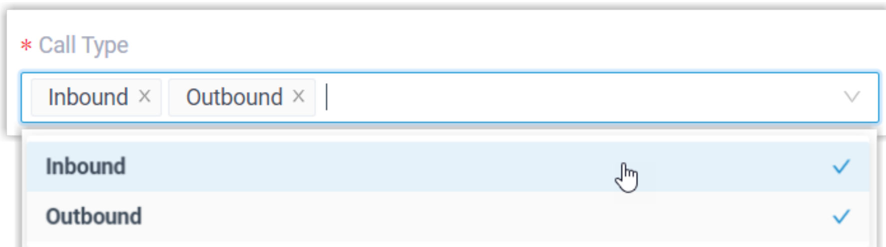
Procedure

1. Log in to PBX web portal, go to **Integrations > CRM**.
2. On the CRM integration page, turn on **Create New Contact**.
3. 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.

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 be automatically created in the CRM.



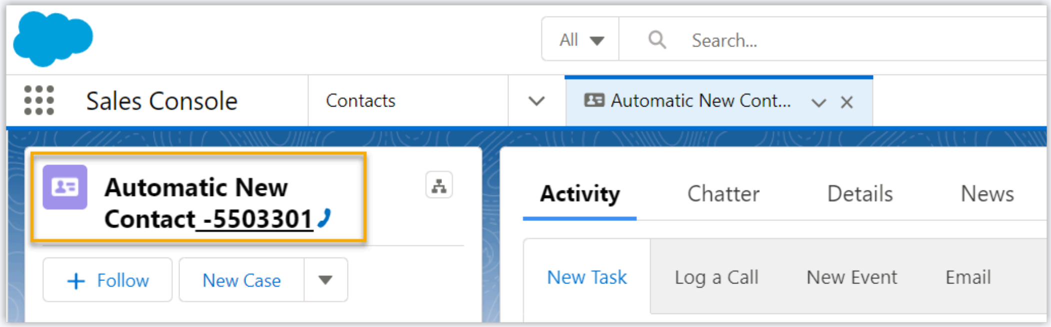
            - **Inbound**: Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
            - **Outbound**: Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
    - If you want to allow associated extension users to manually create contacts in the CRM during a call, select **Manually**.
5. Click **Save**.

Result

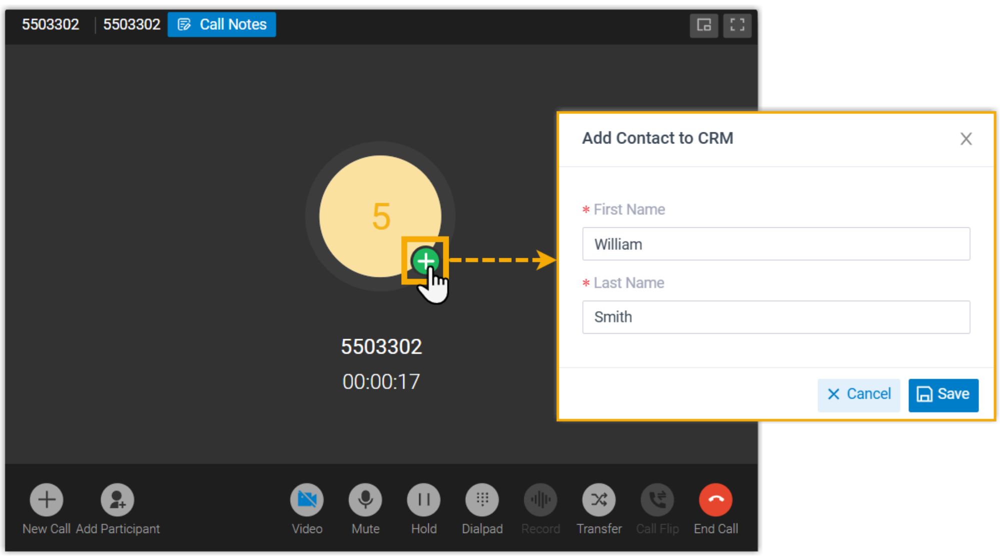
- If automatic creation is configured, when a call is placed to an unknown number, or a call is received from an unknown number, a new contact or lead will be created on Salesforce CRM.

> **Note:**

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



- If 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 synchronized automatically into the phonebook in Yeastar P-Series Software Edition.

Set up Call Popup

After the integration with Salesforce CRM, a web browser tab displaying CRM contact's information will be automatically launched when a CRM user receives an inbound call from a

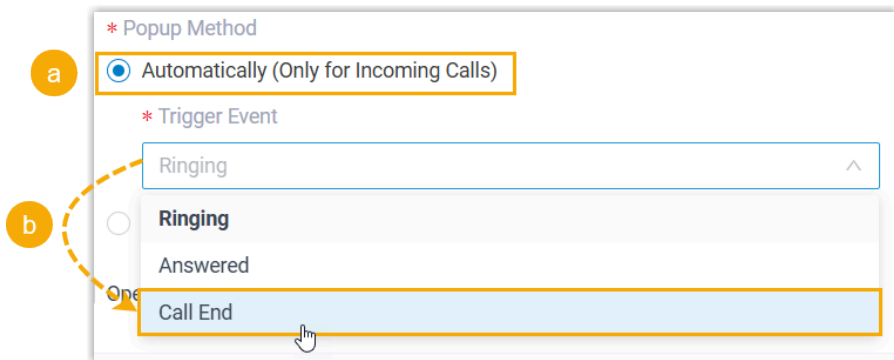
CRM contact by default. You can configure the call popup to be automatically triggered by a specified call event, or be manually opened during a call.

Prerequisites

The Salesforce CRM integration is completed.

Procedure

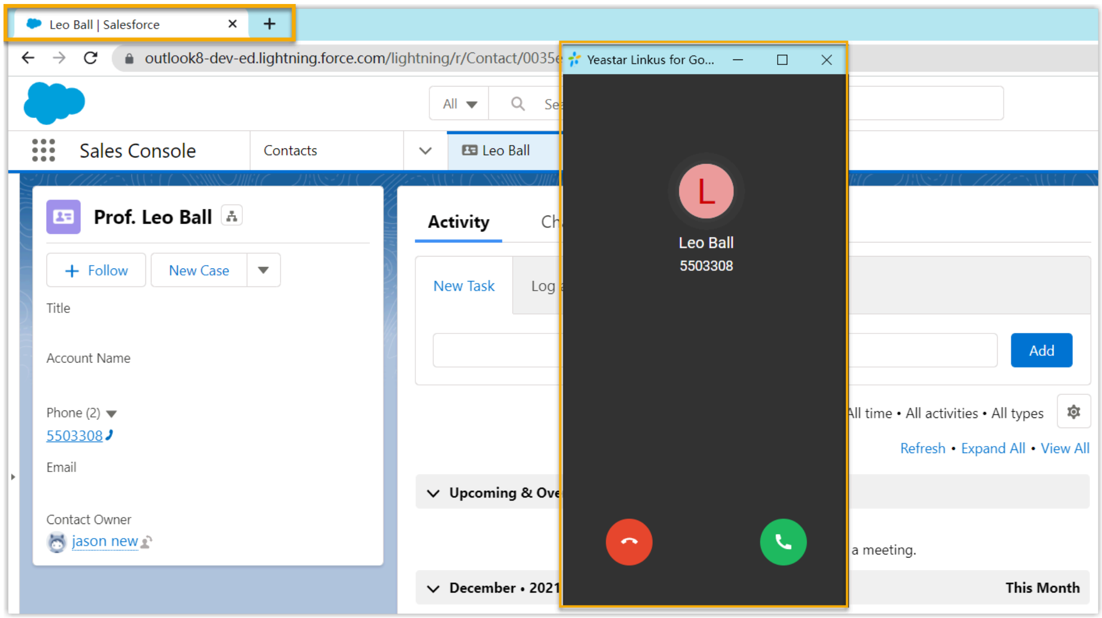
1. Log in to PBX web portal, go to **Extension and Trunk > Extension**.
2. Click to edit the extension associated with a CRM user.
3. In the **Linkus Clients** tab, scroll down to your desired Linkus client, then select the checkbox of **Open Contact URL Using System-Integrated CRM**.
4. In the **Popup Method** section, decide the method of call popup.
   - If you want the system to automatically open the CRM contact details page, do as follows:

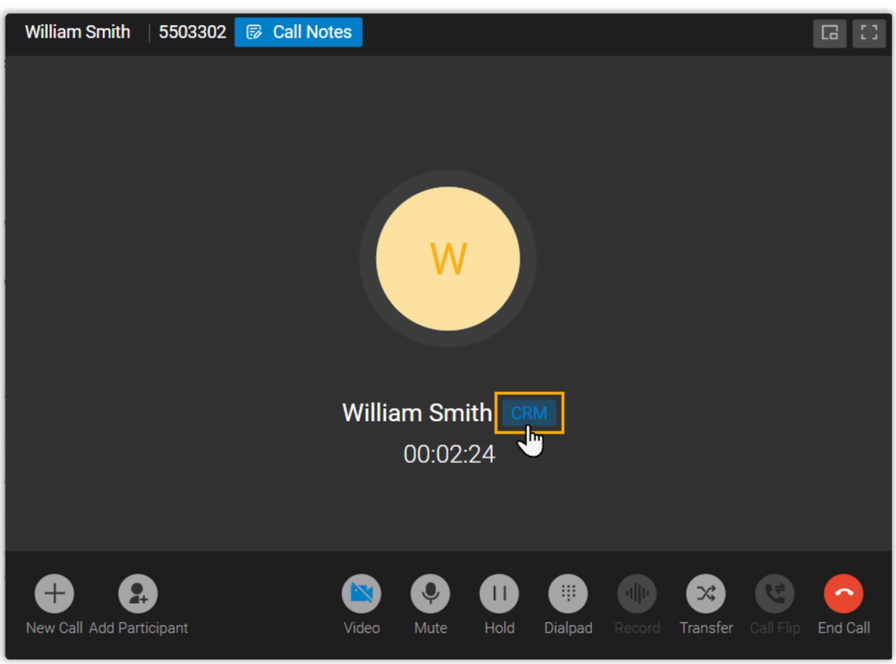
     a. Select **Automatically (Only for Incoming Calls)**.
     b. In the **Trigger Event** drop-down list, set when the call popup will be automatically triggered.
        - **Ringing**: A call popup will be triggered when a Salesforce user receives an inbound call from a CRM contact.
        - **Answered**: A call popup will be triggered when a Salesforce user answers an inbound call from a CRM contact.
        - **Call End**: A call popup will be triggered when a Salesforce 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**.
5. Click **Save**.

Result

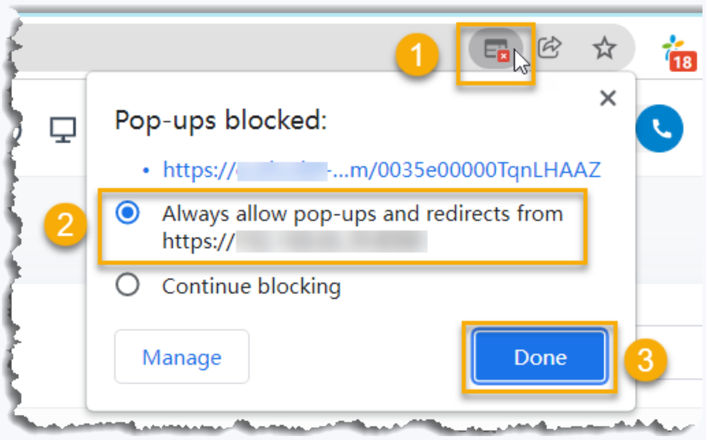
- If automatic call popup is configured, when the specified trigger event occurs on an inbound call from a CRM contact, a new browser tab will be launched to show the contact's information from the CRM.



- 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 Salesforce CRM

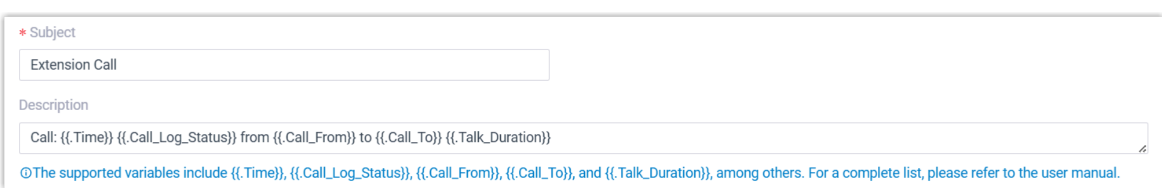
After the integration, you can set up call journal to automatically log all the call activities to Salesforce CRM when an associated user ends calls with CRM contacts.

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, turn on **Call Journal**.
3. Configure the following call log information according to your needs.



- **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 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.

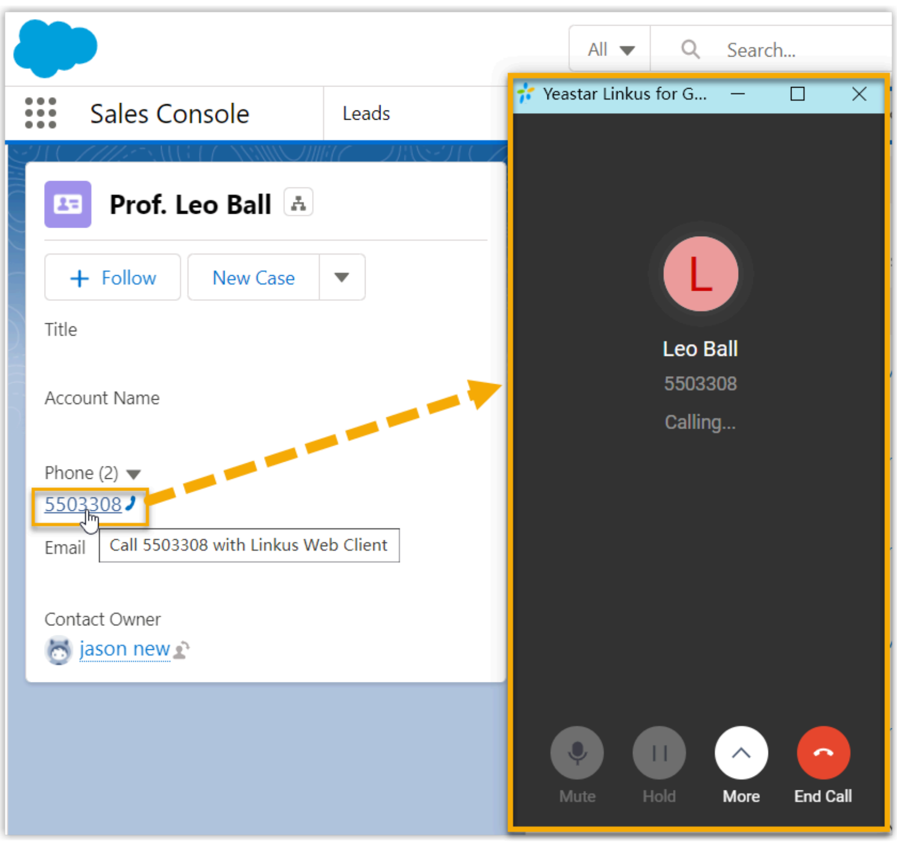
Click to Call

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:

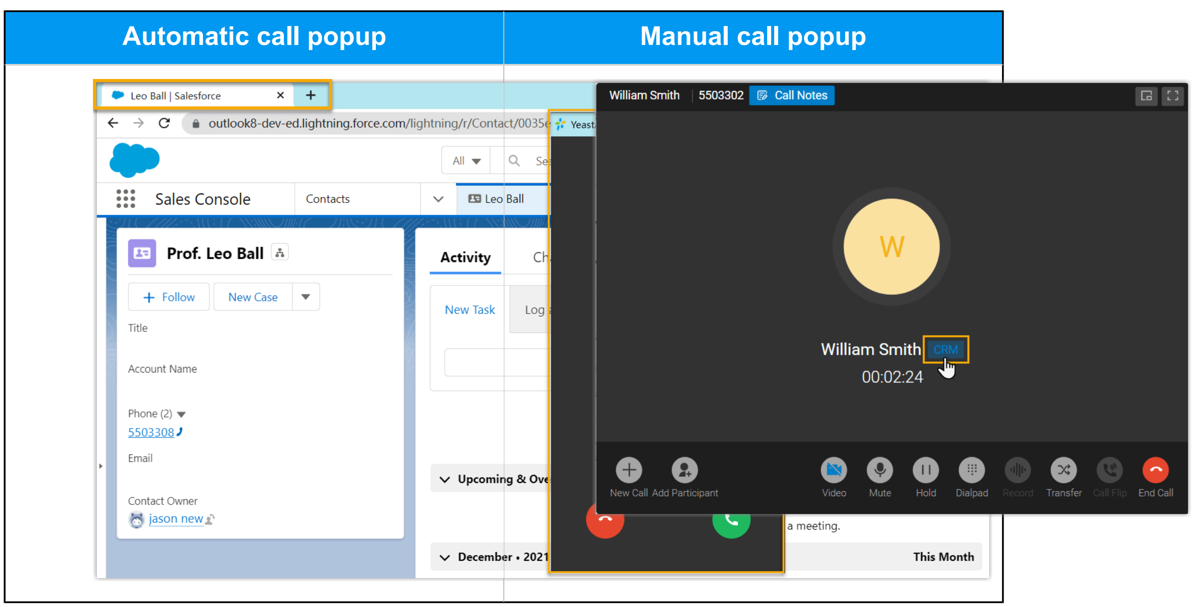
- Linkus Desktop Client
- Linkus Web Client

> **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

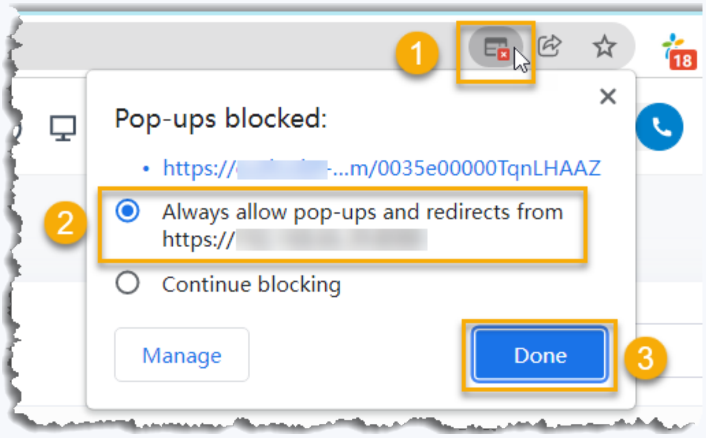
When Salesforce CRM users receive / answer an inbound call from a CRM contact, or finish a call with a CRM contact, a new browser tab will automatically be launched to show the CRM contact's information. Additionally, users can manually open the contact's information from the call window during the call.

> **Note:**
> For more information about the settings, see Set up Call Popup.



> **Note:**

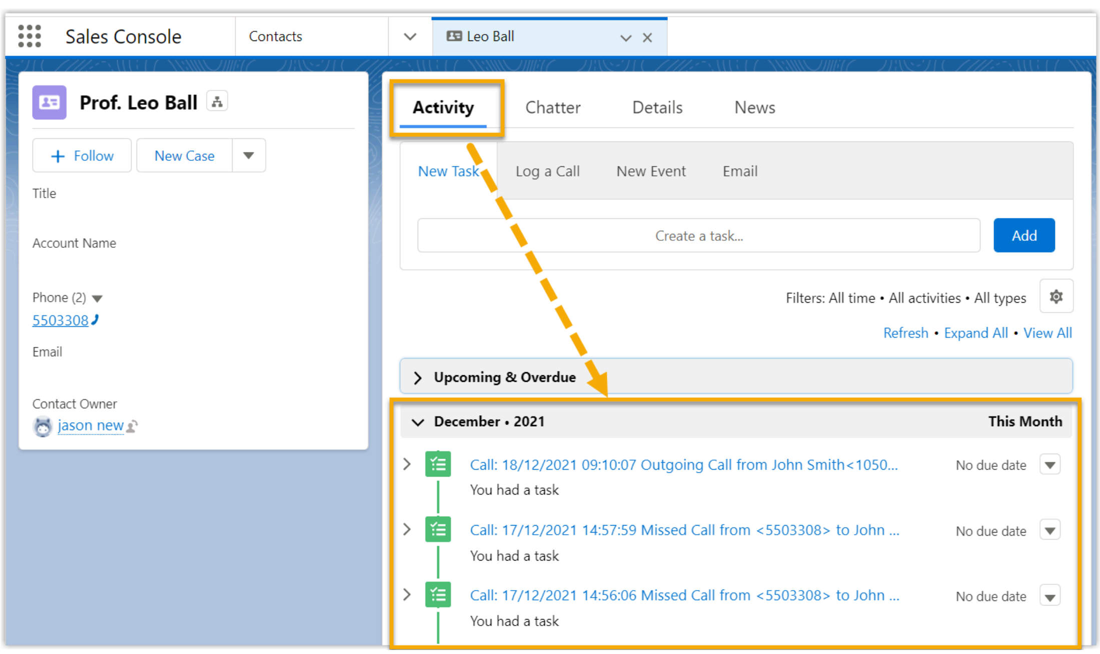
The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**.



Call Journal

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.

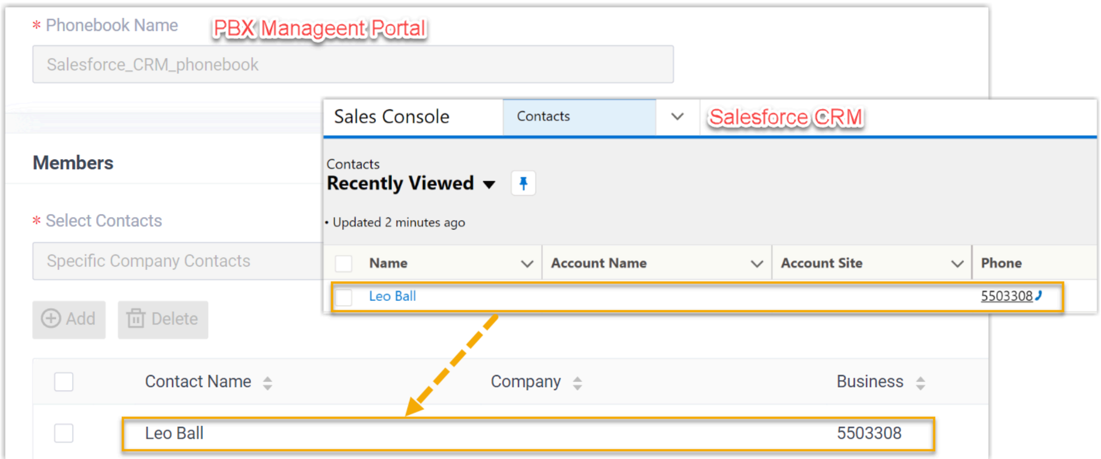
Users can log in to the Salesforce CRM, go to the **Activity** tab in a contact detail page to view the call logs.



Contact Synchronization

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 CRM, the matched Salesforce CRM contact will be synchronized to an associated PBX phonebook, and the synchronized contacts are read-only.

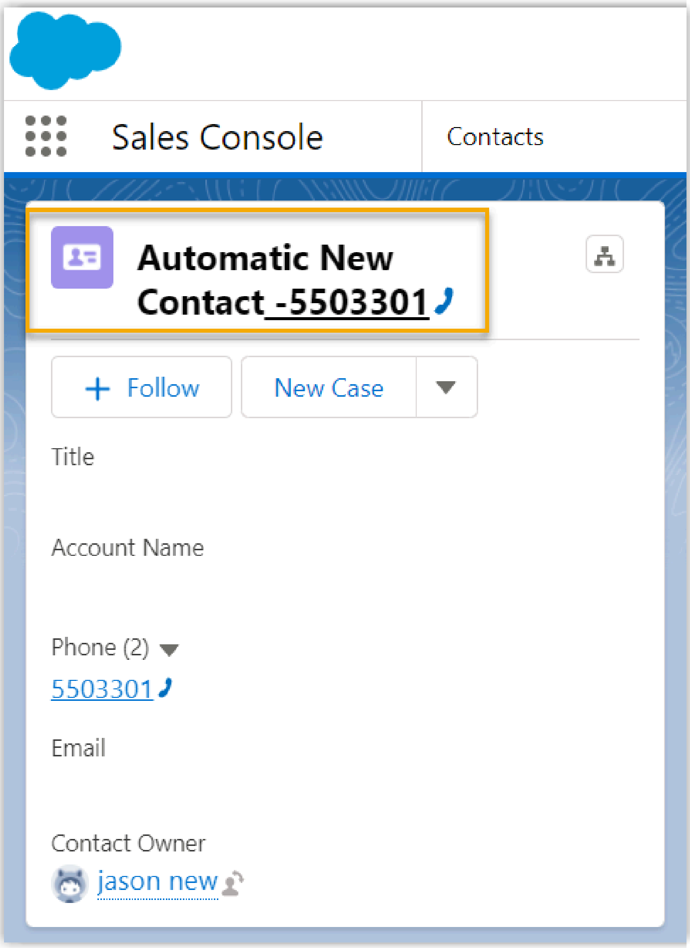
For more information about the synchronization settings, see Set up Contact Synchronization from Salesforce CRM.



Contact or Lead Creation

A new contact or lead can be created automatically or manually 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 about the auto-creation settings, see Set up Lead or Contact Creation for Salesforce CRM.

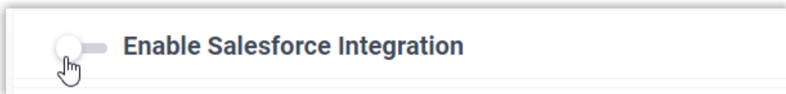

Sales Console
Contacts
Automatic New Contact -5503301
Follow
New Case
Title
Account Name
Phone (2)
5503301
Email
Contact Owner
jason new

Disable Salesforce CRM Integration

You can disable the Salesforce CRM integration on Yeastar P-Series Software 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

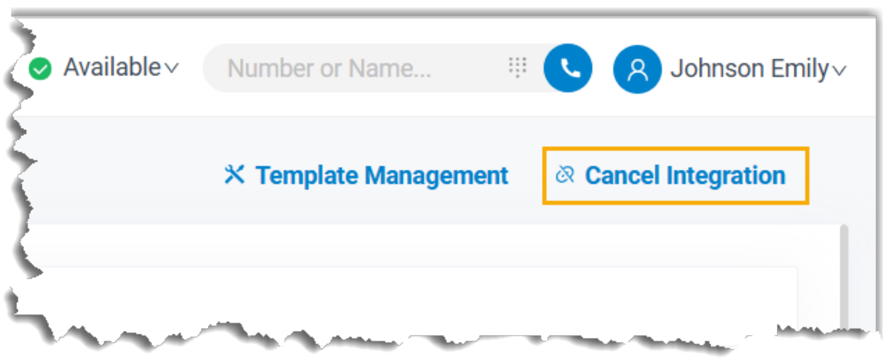
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time the integration is enabled again.

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. At the top-right corner, click **Cancel Integration**.



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.