Zoho CRM Integration Guide

Yeastar P-Series Appliance Edition

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Contents

About This Guide

Yeastar P-Series PBX System supports to integrate with Zoho CRM, which allows your Zoho CRM users to get all the call details right in their CRM entries while keeping the voice traffic in Yeastar P-Series PBX System. Yeastar provides 2 flexible options, with integration settings and features available determined by your Zoho CRM edition. This topic is intended to provide you with the requirements, key features, and terminologies related with the integrations.

CRM API integration (Zoho Free Edition)

This method is designed for Zoho CRM free edition users, enabling integration with PBX systems. It ensures seamless interconnection and interaction between Zoho CRM and the PBX to support features listed in the Zoho CRM Integration Guide (via API). When integrating via API, all calls initiated from Zoho CRM must be handled via Linkus UC Clients, which is required for managing specific processes to ensure the proper functioning of all supported telephony features.

Requirements

Item	Requirement
Zoho CRM	Free, Standard, Professional, Enterprise, or Ultimate edition **Note:** The integration is ONLY supported for Zoho CRM application, and is NOT supported for other related Zoho applications, such as Zoho One, Zoho Mail, Zoho Recruit, etc.
PBX Server	• **Plan**: Yeastar P-Series 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 with Zoho CRM via API provides the following key features:

- **Click to Call**: Users can launch calls by a single click on the detected numbers from Zoho 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 Zoho CRM when a user ends calls with CRM contacts.
- **Contact Synchronization**: Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from / or initiating outbound calls to Zoho CRM contacts.
- **Contact or Lead Creation**: A new contact or lead can automatically or manually be created in CRM for unknown inbound calls or outbound calls.
- **Call Recording Playback**: Zoho users can see and play recordings stored in the PBX from corresponding call log in Zoho interface.

Terminologies

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

Term	Description
Zoho Administrator	The master that can access all the data and manage all the users in Zoho CRM, such as CEO, senior executive, senior administrator, etc.
Zoho User	The corporate staff who can only access specific data based on assigned permissions (roles), such as sales manager, FAE, etc.
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.
Zoho Account	The companies or departments within a company with which you have business dealings. Single or multiple contacts can be associated with an account.

Term	Description
Zoho Contact	The people in an organization with whom your company has business communications in pursuit of business opportunities.
Zoho Lead	Leads are the unqualified contacts or sales opportunities in your business. They are the raw details gathered about individuals or representatives of organizations collected from various campaigns.

PhoneBridge integration (Zoho Paid Edition)

This method is designed for Zoho CRM paid edition users, utilizing Zoho PhoneBridge to integrate with Yeastar P-Series PBX System. It ensures seamless interaction between Zoho CRM and the PBX, enabling all the features outlined in the Zoho CRM Integration Guide (via PhoneBridge). All user operations are managed directly within the Zoho interface, eliminating the need to switch to third-party platforms. This integration offers an intuitive and unified user experience.

Requirements

Item	Requirement
Zoho CRM	• **CRM Edition**: Standard, Professional, Enterprise, or Ultimate edition • **CRM Plus** **Note:** The integration is ONLY supported for Zoho CRM application, and is NOT supported for other related Zoho applications, such as Zoho Mail, Zoho Recruit, etc.
PBX Server	• **Plan**: Yeastar P-Series Enterprise Plan (EP) or Ultimate Plan (UP) • **Firmware**: Version 37.18.0.102 or later

Key features

The integration of Yeastar P-Series PBX System with Zoho CRM via PhoneBridge provides the following key features:

- **Click to Call**: Users can launch calls directly with the call button on Zoho CRM interface, without having to jump to other platforms.

- **Call Popup**: Automatically bring up the contact's profile on the pop-up window when users 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 Zoho CRM when a user ends calls with CRM contacts.

- **Contact Synchronization**: Synchronize CRM contacts to an associated PBX phonebook when receiving inbound calls from / or initiating outbound calls to Zoho CRM contacts.
- **Automatic Contact or Lead Creation**: A new contact or lead can automatically or manually be created in CRM for unknown inbound calls or outbound calls.
- **Play Call Recording**: Zoho users can see and play recordings stored in the PBX from corresponding call log in Zoho interface.

Terminologies

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

Term	Description
Zoho Administrator	The master that can access all the data and manage all the users in Zoho CRM, such as CEO, senior executive, senior administrator, etc.
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Zoho Account	The companies or departments within a company with which you have business dealings. Single or multiple contacts can be associated with an account.
Zoho Contact	The people in an organization with whom your company has business communications in pursuit of business opportunities.
Zoho Lead	Leads are the unqualified contacts or sales opportunities in your business. They are the raw details gathered about individuals or representatives of organizations collected from various campaigns.

Zoho CRM Integration (via CRM API)

Integrate Yeastar P-Series PBX System with Zoho CRM

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

Prerequisites

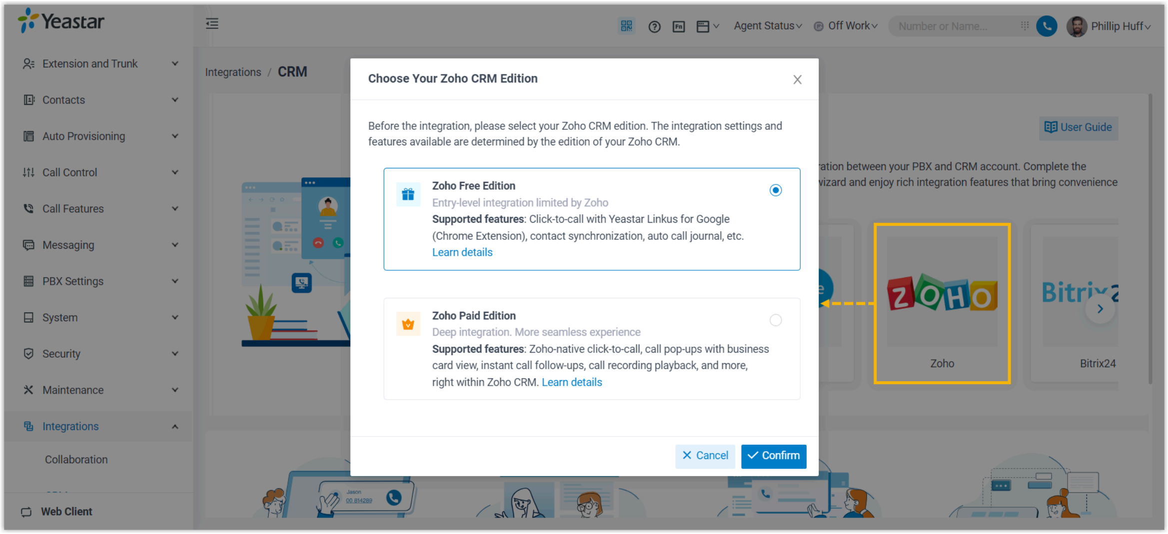
- Make sure that the PBX can be remotely accessed via domain name.
  For more information about the configuration, see the following topics:
    - Configure Network for Remote Access by a Yeastar FQDN
    - Configure Network for Remote Access by a Yeastar Domain Name
    - Configure Network for Remote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

Procedure

- Step 1. Get the PBX authentication information
- Step 2. Register the PBX with Zoho CRM
- Step 3. Make Authorization Request to Zoho CRM
- Step 4. Associate Zoho CRM users with PBX extensions

Step 1. Get the PBX authentication information

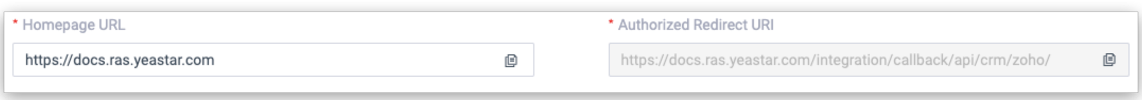
1. Log in to PBX web portal, go to **Integrations > CRM**.
2. Click **Zoho**, then select your Zoho CRM edition.



3. In **Network** section, select the URL from the **Homepage URL** drop-down list.

> **Note:**
> The **Homepage URL** is the web page URL of your PBX, Zoho CRM will communicate with the PBX with the selected URL.

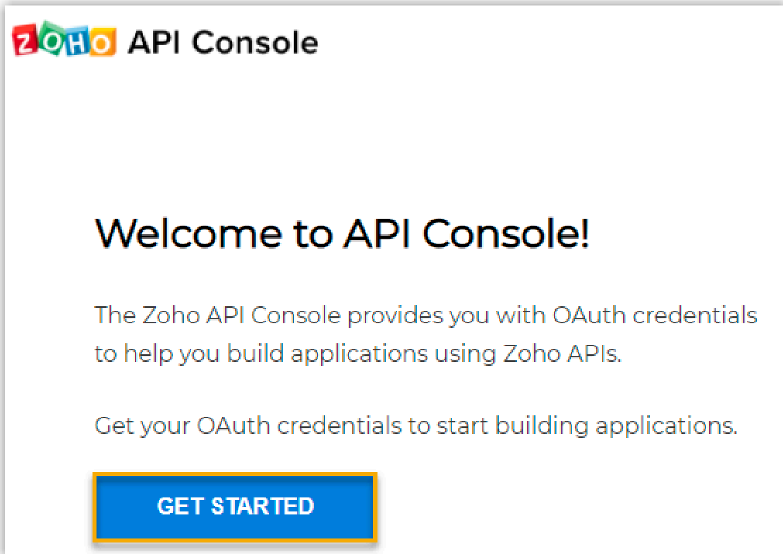
A redirect URI according to the selected Homepage URL is automatically generated in the **Authorized Redirect URI** field.



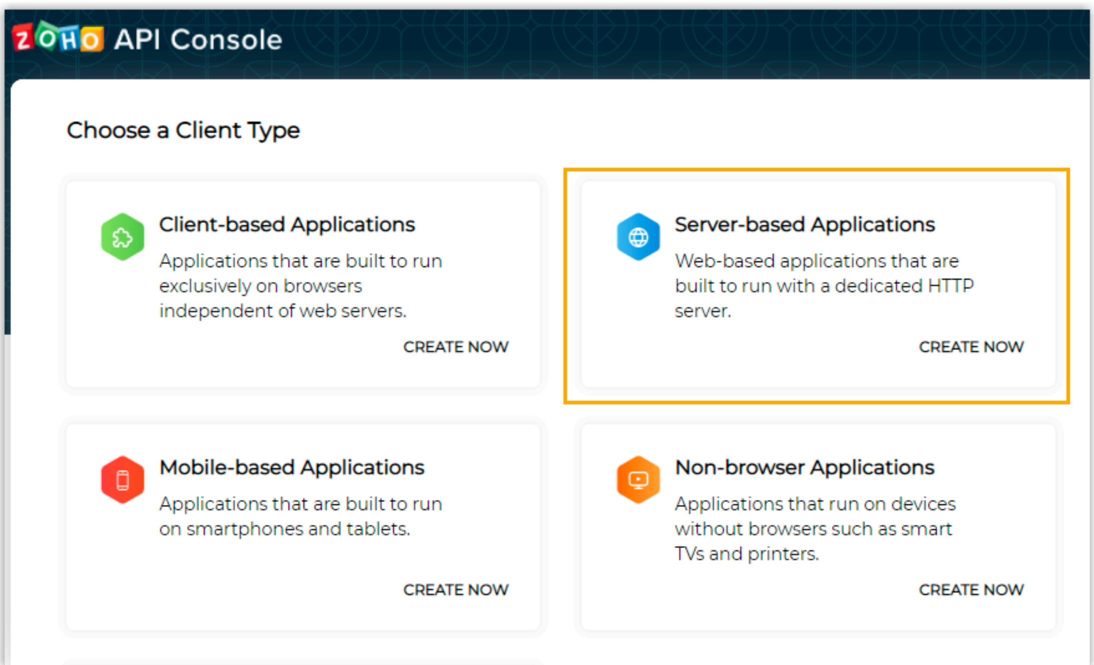
4. Take note of the Homepage URL and the redirect URI as you will use them later on Zoho CRM.

Step 2. Register the PBX with Zoho CRM

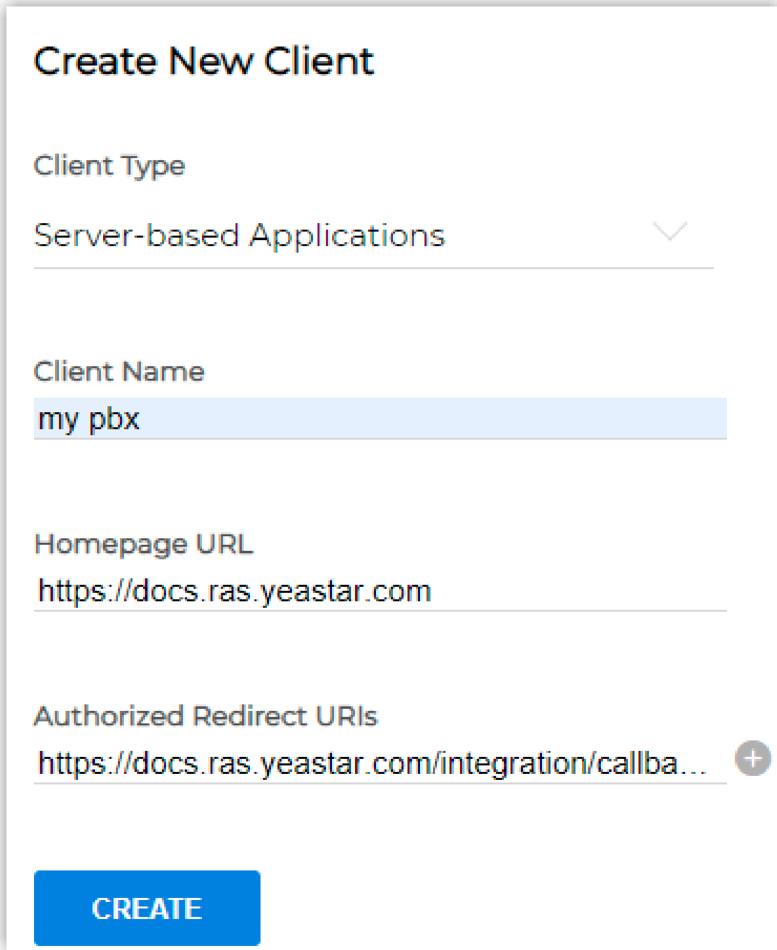
1. Log in to the [Zoho API Console](), click **GET STARTED**.



2. On the **Choose a Client Type** page, select **Server-based Applications**.



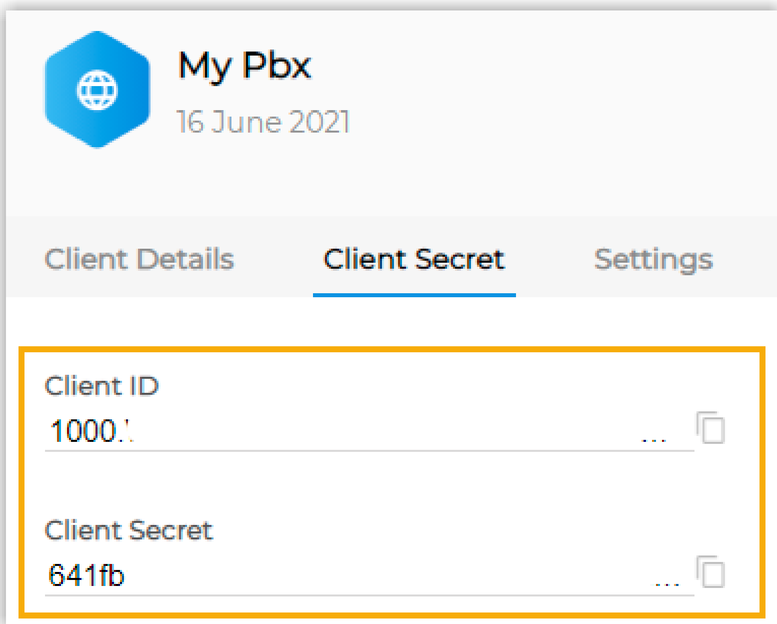
3. On the **Create New Client** page, enter the PBX information to register as a Zoho CRM client.



- **Client Name**: Set a client name.
- **Homepage URL**: Paste the PBX Homepage URL.
- **Authorized Redirect URI**: Paste the PBX authorized redirect URI.

4. Click **CREATE**.

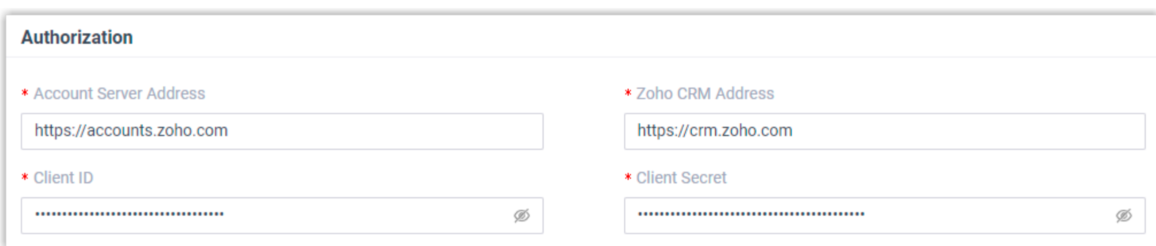
   A Client ID and a Client Secret are generated.



5. Take note of the Client ID and Client Secret, as you will need them later.

Step 3. Make Authorization Request to Zoho CRM

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



- **Account Server Address**: Enter the CRM Account Server URL.

> **Note:**
> The default URL `https://accounts.zoho.com` applies in many cases, but you may need to change the domain URL according to the location where you signed up your Zoho account. For example, if your Zoho account is signed up in Europe, you need to change the URL to `https://accounts.zoho.eu`.

- **Zoho CRM Address**: Enter the Zoho CRM URL.

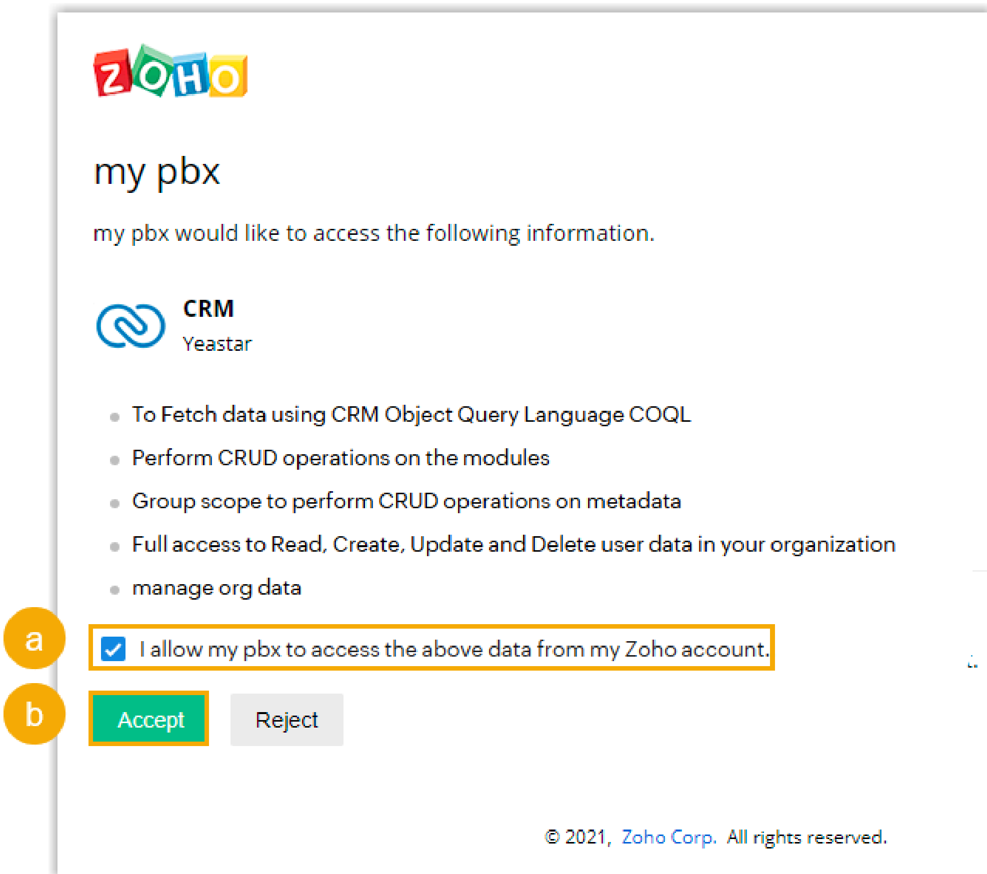
> **Note:**
> The default URL `https://crm.zoho.com` applies in many cases, but you may need to change the domain URL [according to the location] where you signed up your Zoho account. For example, if your Zoho account is signed up in Europe, you need to change the URL to `https://crm.zoho.eu`.

- **Client ID**: Paste the Zoho API Client ID.
- **Client Secret**: Paste the Zoho API Client secret.

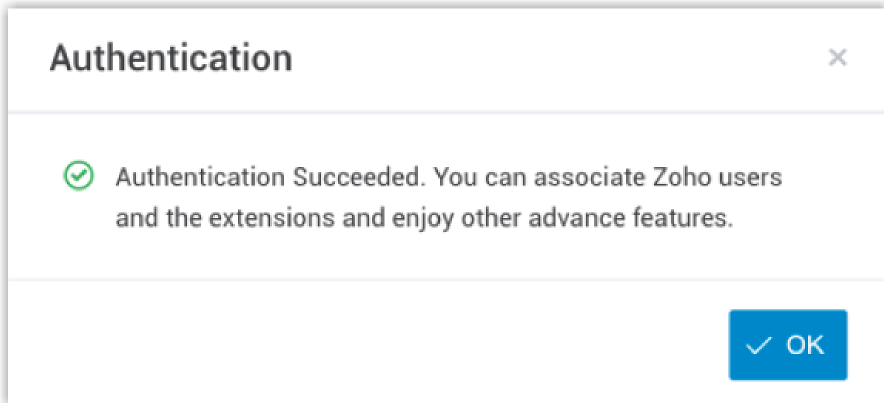
4. Click **Save**.

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

5. In the authorization page, select the checkbox of the disclaimer, then click **Accept** to allow the PBX to access data in your Zoho account.

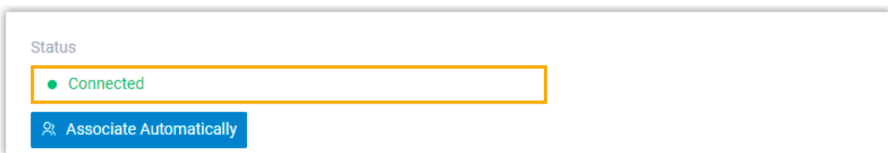


You are redirected to the PBX configuration page, a pop-up window displays the authentication result.



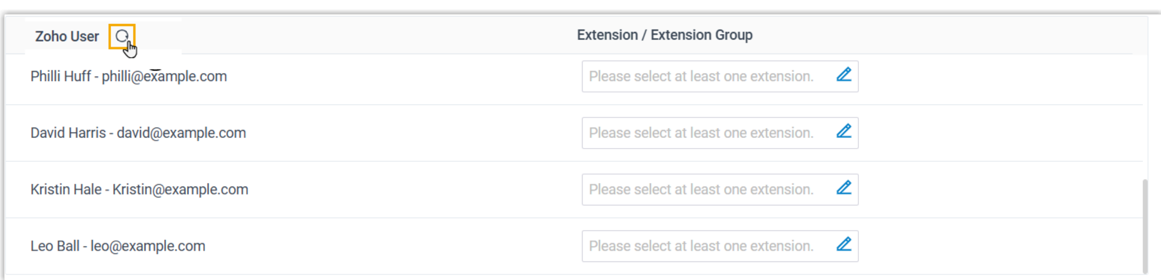
6. Click **OK** to confirm.

   The **Status** field will display **Connected**, indicating that the Zoho CRM integration is successfully set up.



Step 4. Associate Zoho CRM users with PBX extensions

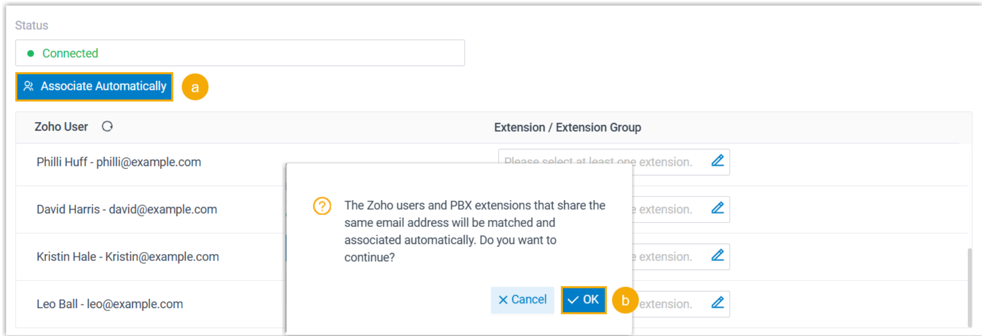
1. On the CRM integration page, click besides **Zoho User** to obtain the latest Zoho CRM user list.



2. Associate the Zoho users with PBX extensions.

   Associate automatically

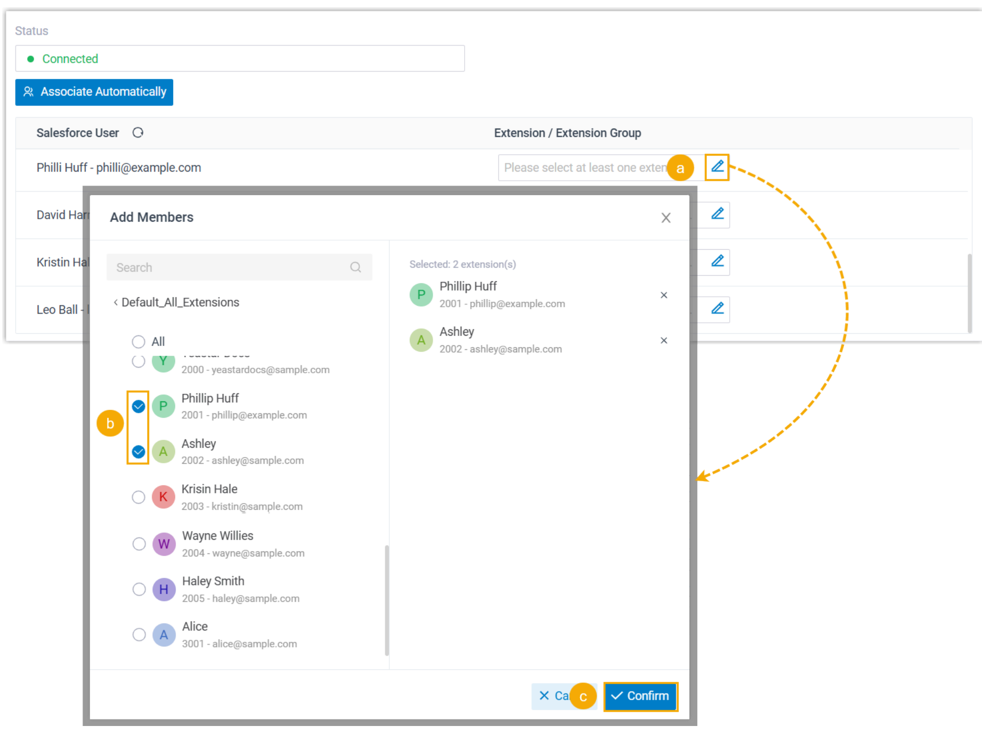
   If users bind the same email address to their Zoho accounts and PBX extensions, you can implement automatic association of their Zoho accounts and PBX extensions.



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

Associate manually

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



a. In the **Extension / Extension Group** field beside the Zoho 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 PBX System and Zoho CRM is set up.
- Associated Zoho CRM users can make or receive calls with their PBX extensions.

What to do next

- Set up Contact Synchronization from Zoho CRM
- Set up Lead or Contact Creation for Zoho CRM
- Set up Call Popup
- Use Zoho CRM Integration

Set up Contact Synchronization from Zoho CRM

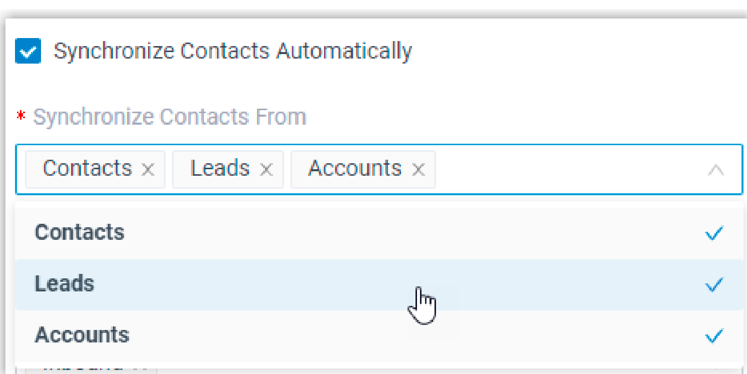
After integrate with Zoho CRM, you can enable a one-way contact synchronization on PBX to sync the Zoho CRM Contacts to a specific PBX phonebook.

Prerequisites

The Zoho CRM integration is completed.

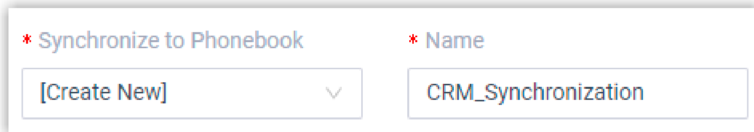
Procedure

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 types of contacts to be synchronized from Zoho CRM.

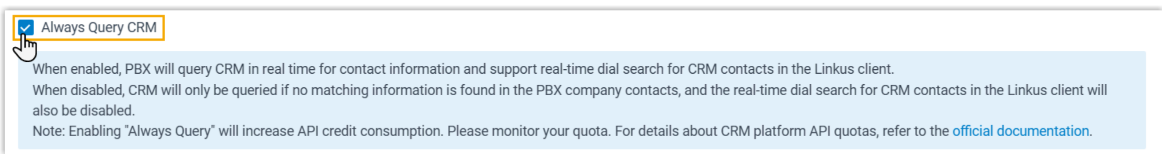


4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from Zoho CRM.

> **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.



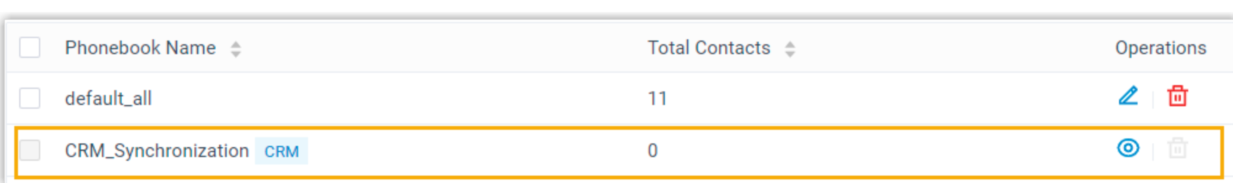
- If enabled, PBX will query CRM in real time for contact information, and support real-time dial search for CRM contacts in the Linkus clients of the associated extension users.
- If disabled, PBX will only query CRM when there is no matching information found in the PBX company contacts.

> **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 the specified type of Zoho 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 PBX System.

Note:

- This is a one-way sync to Yeastar P-Series PBX System, therefore the associated phonebook and the synced contacts are read-only.
- If the information of synchronized contacts is updated in Zoho CRM, the change will be automatically synchronized to PBX in 30 minutes.

Troubleshooting:
Why did PBX fail to synchronize the existing contacts in Zoho CRM?

Set up Lead or Contact Creation for Zoho CRM

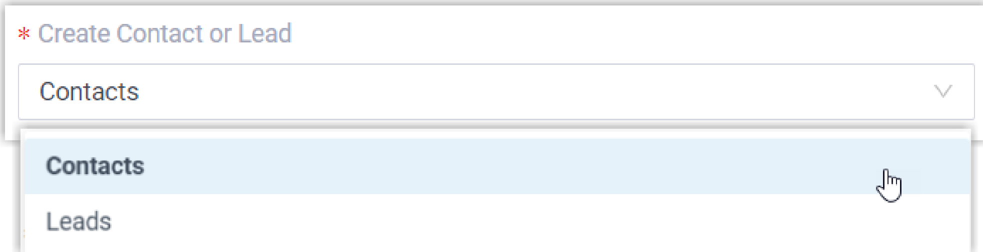
After integrate with Zoho CRM, you can set up automatic or manual lead or contact creation. If enabled, a new contact or lead can be created on the CRM when the user receives a call from an unknown number or places a call to an unknown number. This feature helps you to build your contact database efficiently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

Prerequisites

The Zoho CRM integration is completed.

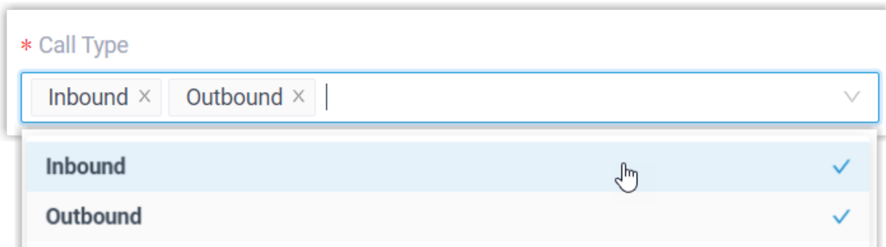
Procedure

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.

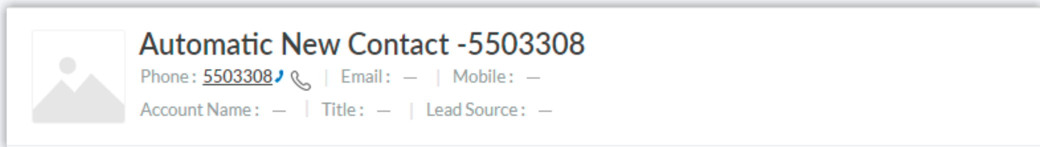
    - If you want to allow associated extension users to manually create contacts in the CRM during a call, select **Manually**.
5. Click **Save**.

Result

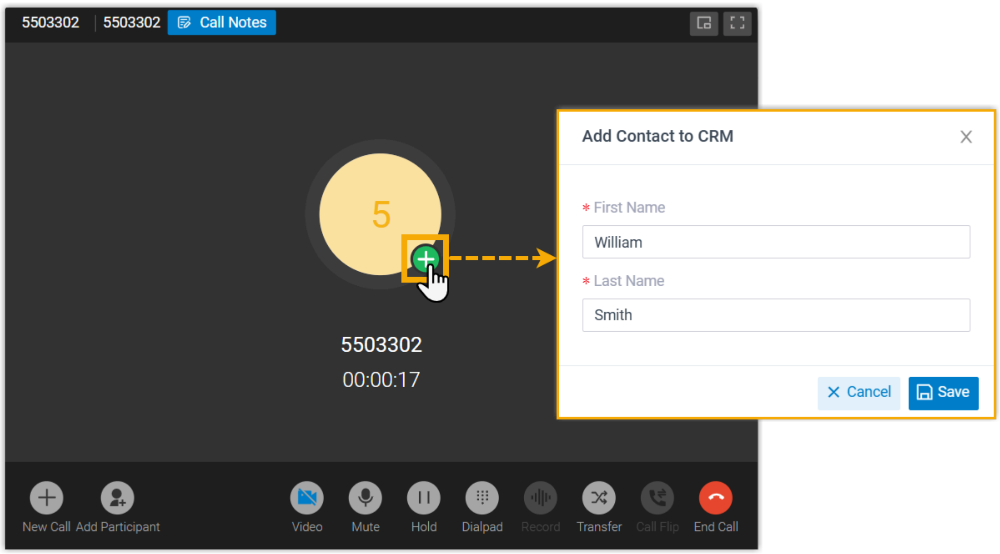
- If automatic creation is configured, when a call is placed to a unknown number or a call is received from a unknown number, a new contact or lead will be created in Zoho CRM.

> **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 PBX System.

Set up Call Popup

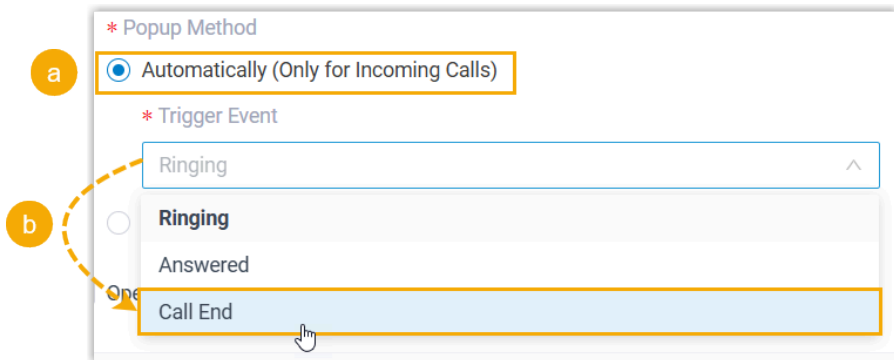
After the integration with Zoho CRM, a web browser tab displaying CRM contact's information will be automatically launched when a CRM user receives an inbound call from a CRM contact by default. You can configure the call popup to be automatically triggered by a specified call event, or be manually opened during a call.

Prerequisites

The [Zoho CRM integration]() is completed.

Procedure

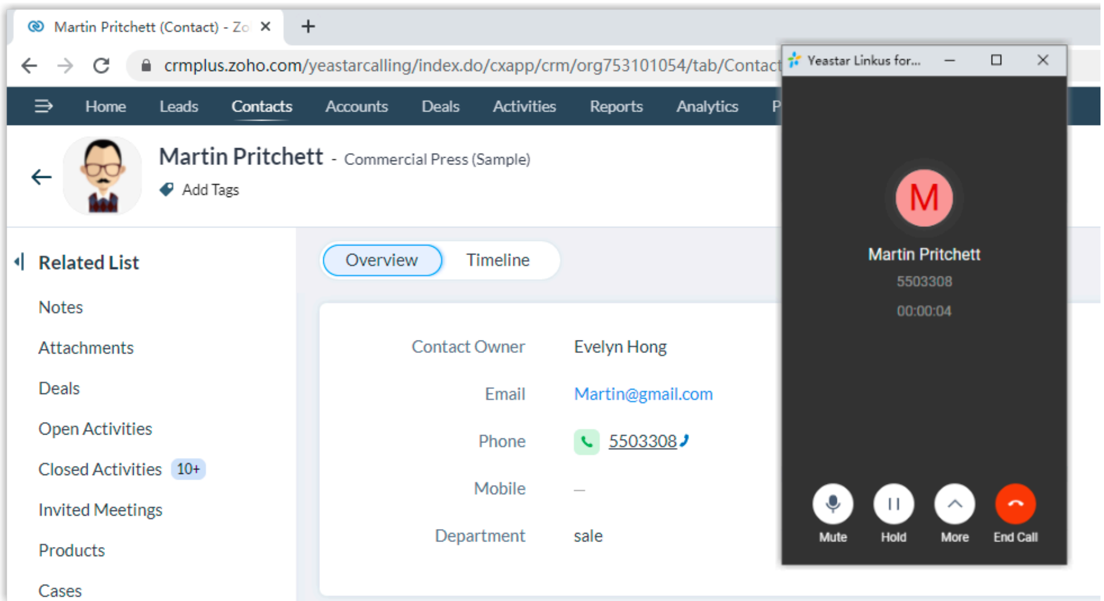
1. Log in to PBX web portal, go to **Extension and Trunk > Extension**.
2. Click to edit the extension associated with a CRM user.
3. In the **Linkus Clients** tab, scroll down to your desired Linkus client, then select the checkbox of **Open Contact URL Using System-Integrated CRM**.
4. In the **Popup 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 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**.
5. Click **Save**.

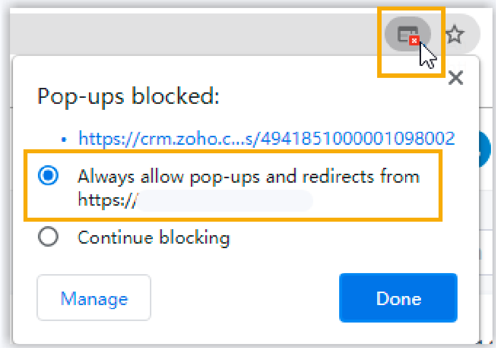
Result

- 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 Zoho CRM

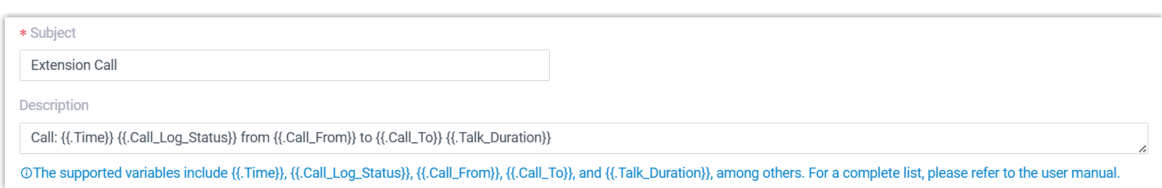
After the integration, you can set up call journal to automatically log all the call activities to Zoho CRM when an associated user ends calls with CRM contacts.

Prerequisites

The Zoho CRM integration is completed.

Procedure

1. Log in to PBX web portal, go to **Integration > CRM**.
2. On the CRM integration page, turn on **Call Journal**.
3. Configure the 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](#).

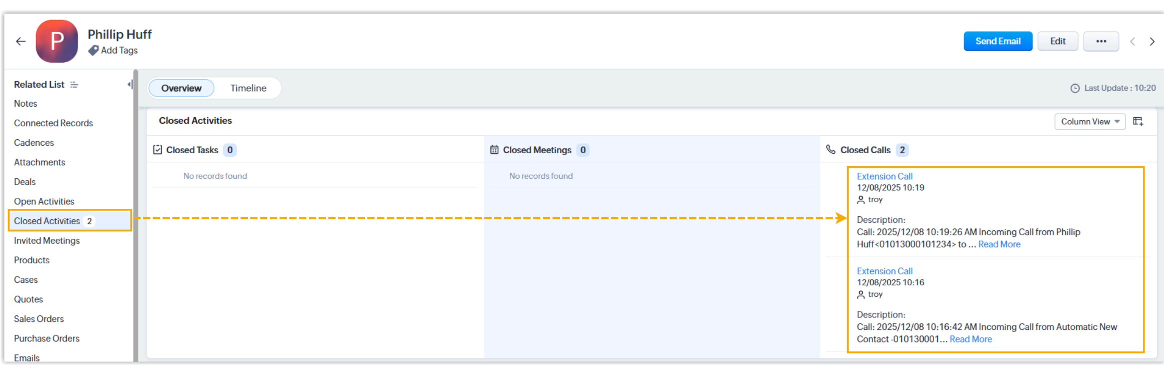
4. Configure the following settings according to your needs.

Setting	Description
Play Call Recording	If enabled, the CRM users who associated with extensions on PBX can directly view and play call recordings stored on the PBX within the CRM system. **Note:** When users click to play call recording in the CRM, the system will request recording file from the PBX. For details on how the CRM platform protects the privacy of recording data, please contact CRM provider.
Disable Display Missed Call Records in Unanswered Agents	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.

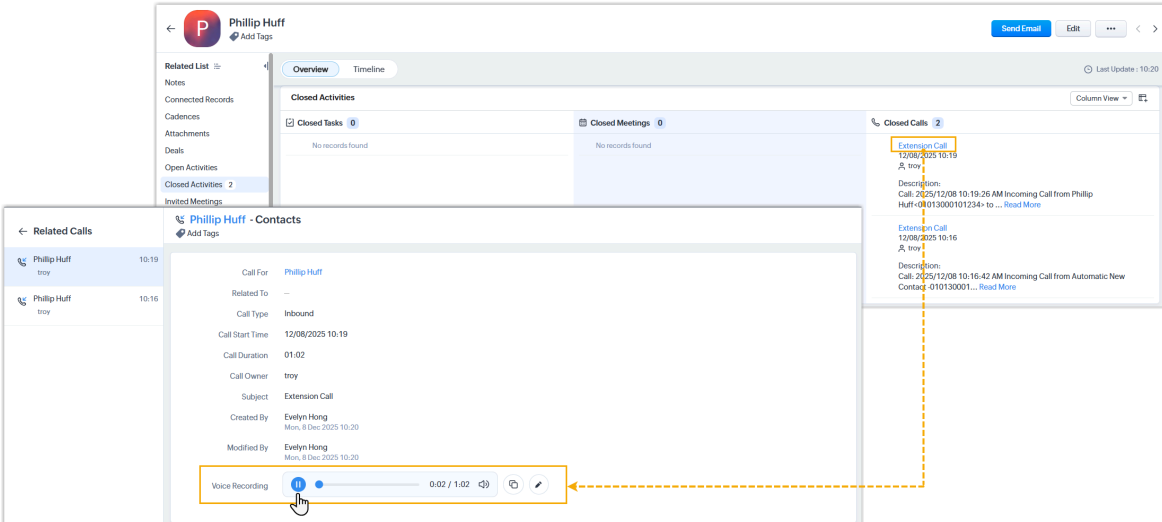
5. Click **Save**.

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.



- If you have enabled the call recording playback feature, Zoho CRM users can view and play the corresponding call recordings within the CRM.



Use Zoho CRM Integration

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

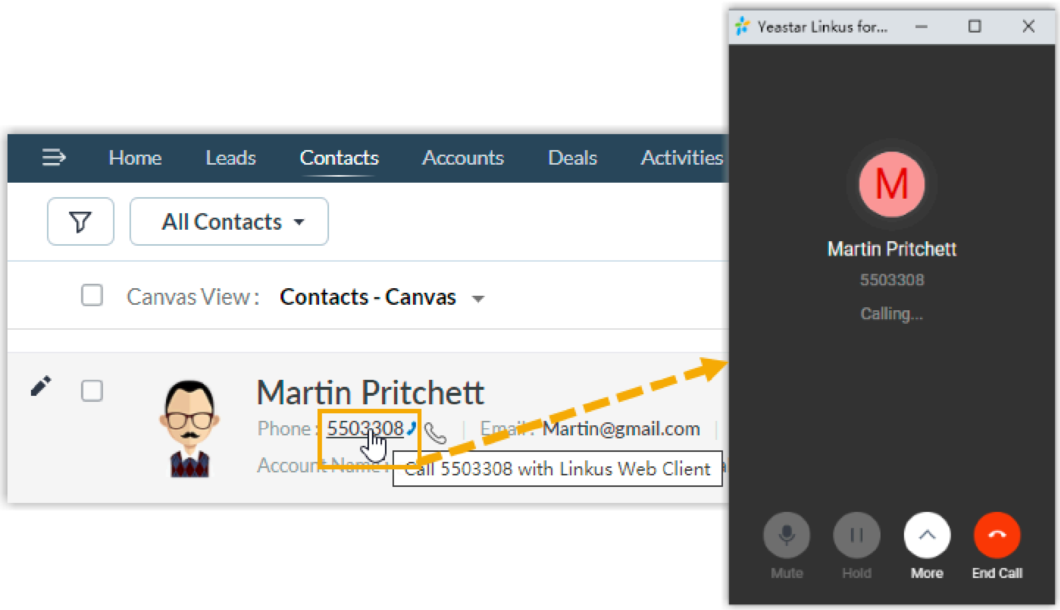
Click to Call

Prerequisites

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

Procedure

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



Call Popup

Prerequisites

Keep at least one of the following clients logged in:

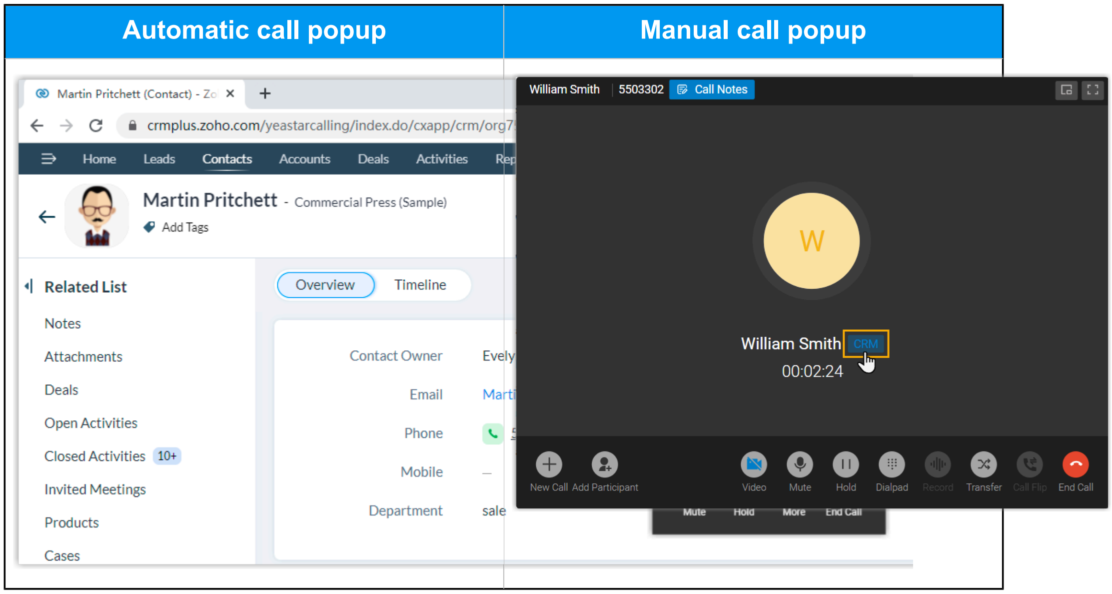
- Linkus Desktop Client
- Linkus Web Client

> **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.

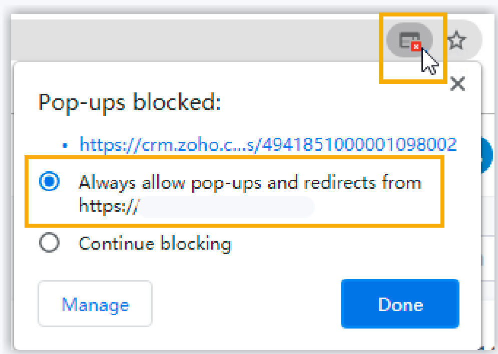
Procedure

When Zoho 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.



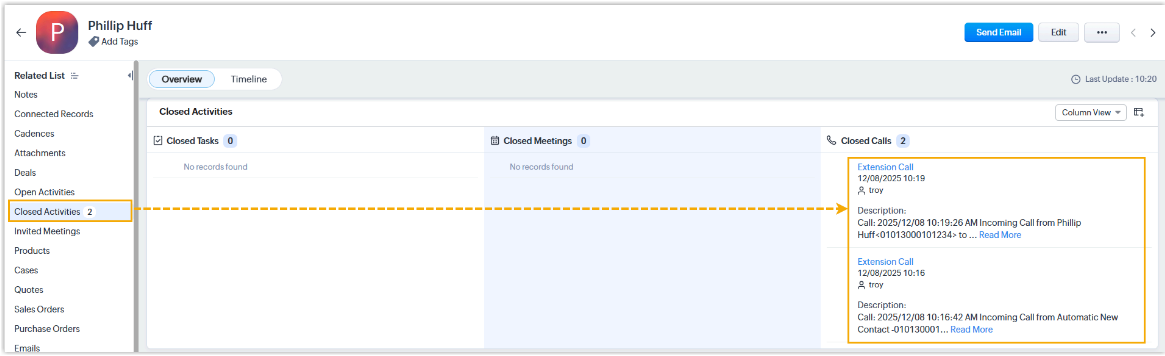
Note:
The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



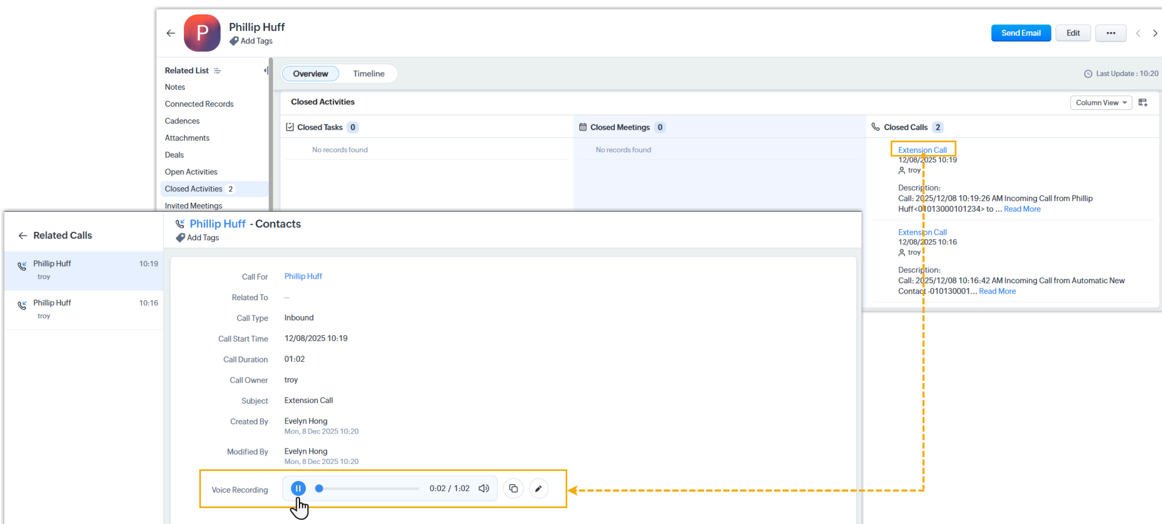
Call Journal

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

- Users can log in to the Zoho CRM, go to the **Closed Activities** section in a contact detail page to view the call logs.



- If you have enabled the call recording playback feature, Zoho CRM users can view and play the corresponding call recordings within the CRM.

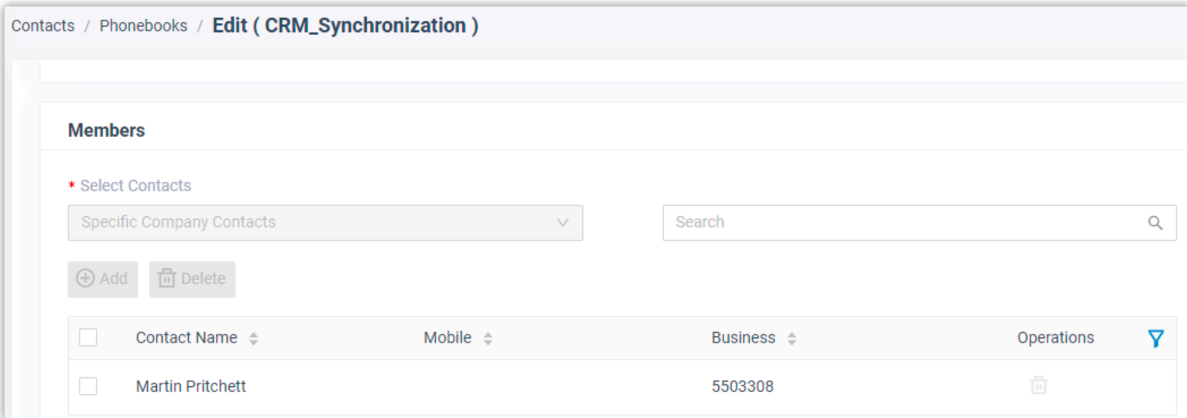


For more information, see [Set up Call Journal to Zoho CRM].

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 Zoho CRM contact will be synchronize to an associated PBX phonebook, and the synchronized contact is read-only.

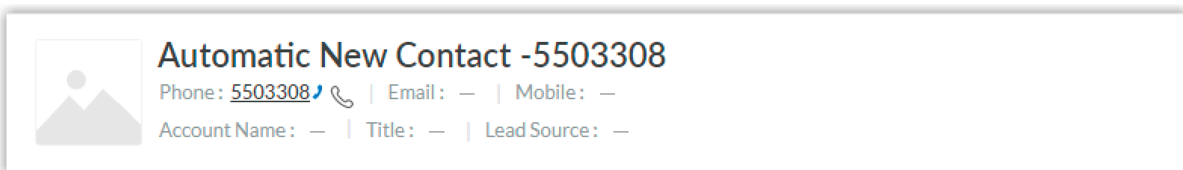
For more information, see [Set up Contact Synchronization from Zoho CRM].



Contact or Lead Creation

A new contact or lead can be created automatically or manually in CRM when the Zoho 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 Lead or Contact Creation for Zoho CRM.

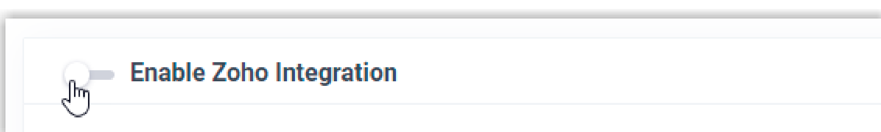


Disable Zoho CRM Integration

You can disable the Zoho 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 Zoho Integration** switch on the top.



3. Click **Save**.

Result

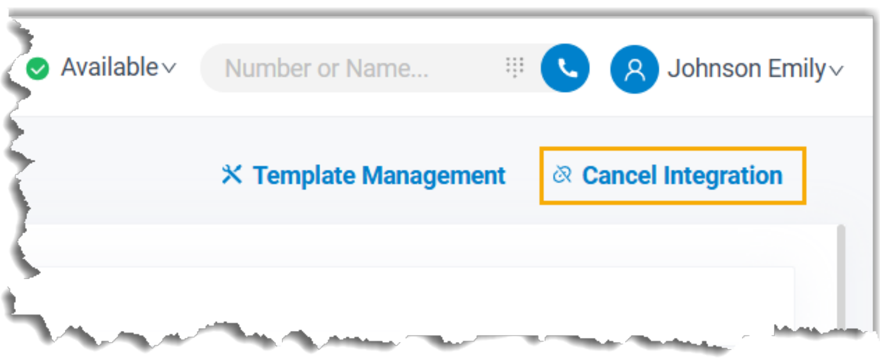
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

Disconnect Zoho CRM Integration

When 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 Zoho 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.

Zoho CRM Integration (via PhoneBridge)

Integrate Yeastar P-Series PBX System with Zoho CRM via PhoneBridge

This topic describes how to integrate Yeastar P-Series PBX System with Zoho CRM via PhoneBridge.

Requirements

PBX Server

- **Plan**: Yeastar P-Series Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 37.18.0.102or later

Zoho CRM

- **CRM Edition**: Standard, Professional, Enterprise, or Ultimate edition
- **CRM Plus**

> **Note:**
> The integration is ONLY supported for Zoho CRM application, and is NOT supported for other related Zoho applications, such as Zoho Mail, Zoho Recruit, etc.

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
- Make sure that your Zoho account has administrative privilege.
- Make sure that your Zoho account is registered with one of the following Zoho data centers:

- US: https://accounts.zoho.com/
- Europe: https://accounts.zoho.eu/
- India: https://accounts.zoho.in/
- Australia: https://accounts.zoho.com.au/
- China: https://accounts.zoho.com.cn

Note:

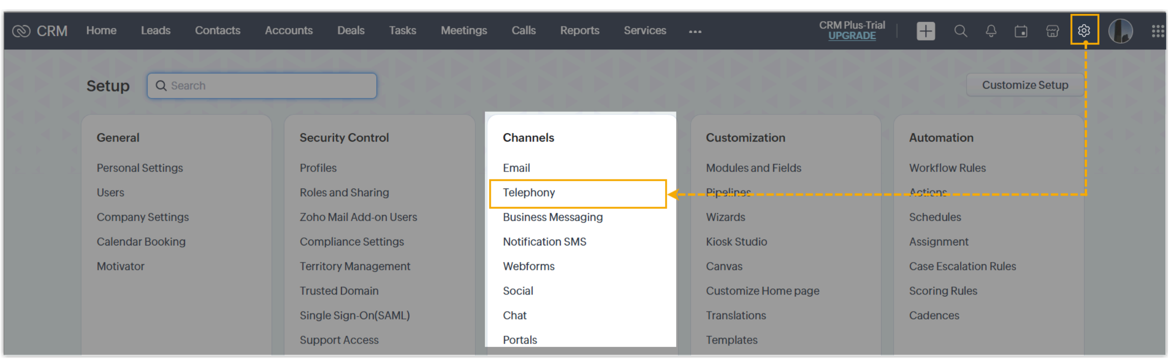
- To confirm your data center location, please visit Zoho: Know Your Datacenter.
- If your account is registered with a different data center, you can opt for Zoho CRM integration via API instead.

Procedure

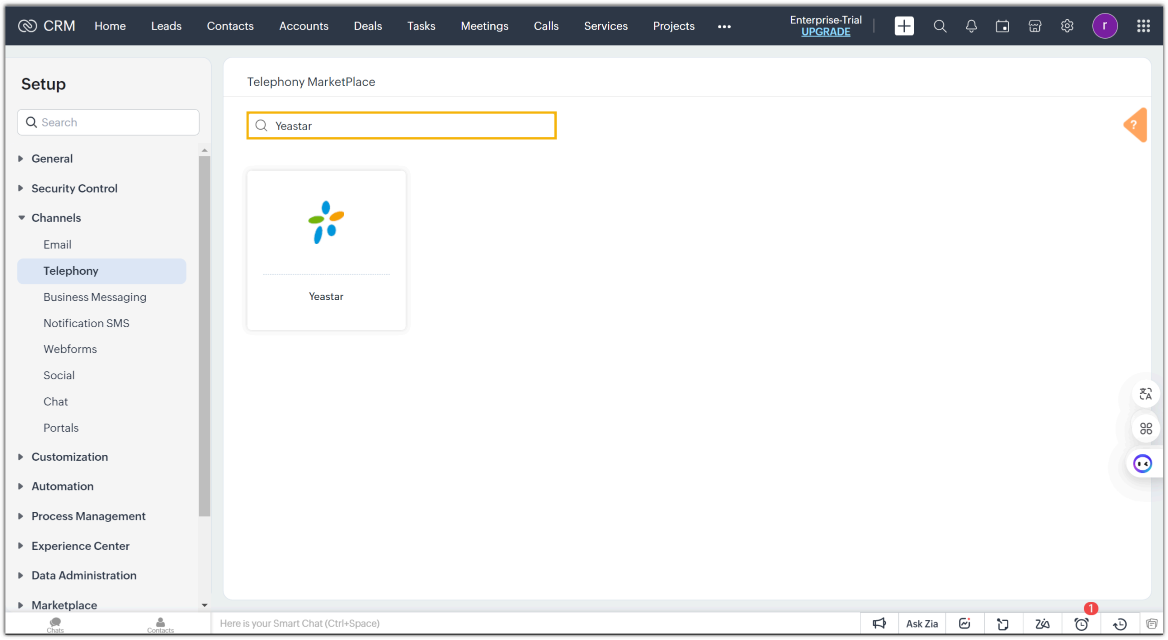
- Step 1. Install Yeastar App from Zoho Telephony Marketplace
- Step 2. Authenticate the integration on Yeastar PBX
- Step 3. Associate extensions with Zoho Users

Step 1. Install Yeastar App from Zoho Telephony Marketplace

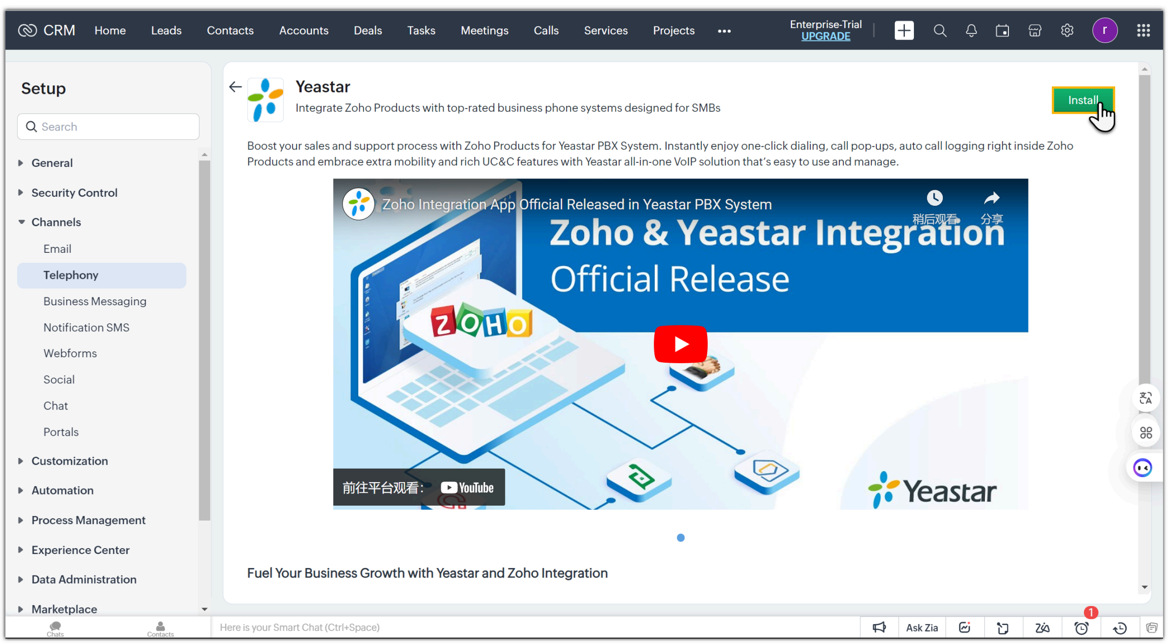
1. Log in to your Zoho account with administrative privilege, go to **Setup > Channels > Telephony**.



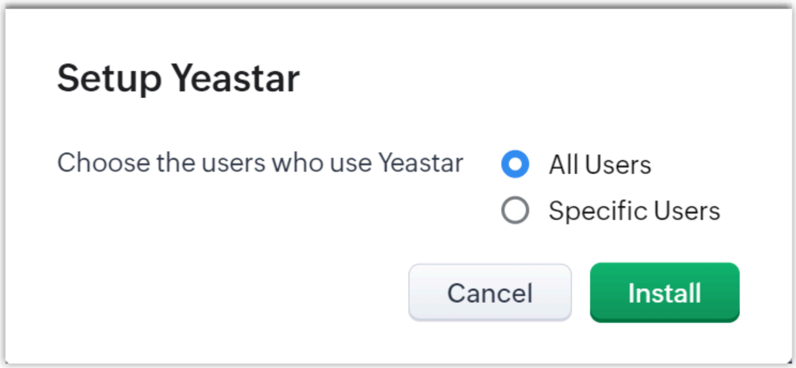
2. On the **Telephony MarketPlace** page, search for **Yeastar**.



3. Select the app, then click **Install**.

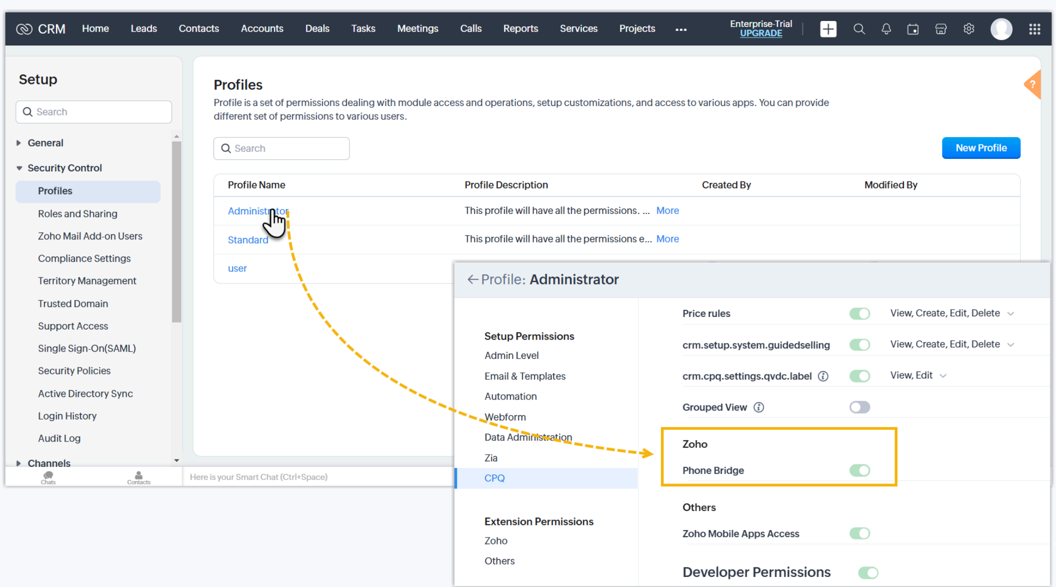


4. In the pop-up window, choose Zoho users to associate with PBX extensions, then click **Install**.



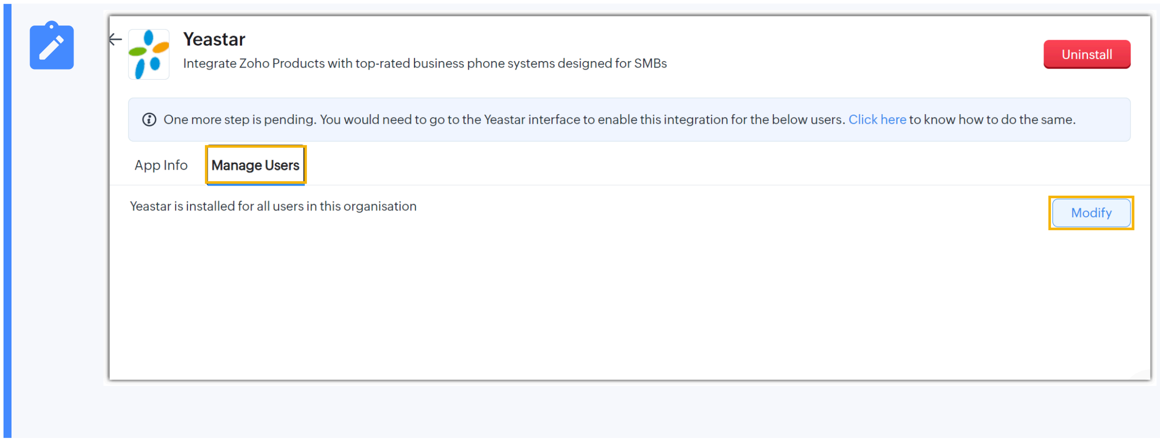
- **All Users**: Grant all Zoho users to access [integration features].
- **Specific Users**: Manually choose which Zoho users are allowed to access [integration features].

Note:
Only activated users with permission for Zoho PhoneBridge can be associated with PBX. You can go to **Setup > Security Control > Profiles** to view or edit profile permissions as needed.



The Yeastar App is successfully installed.

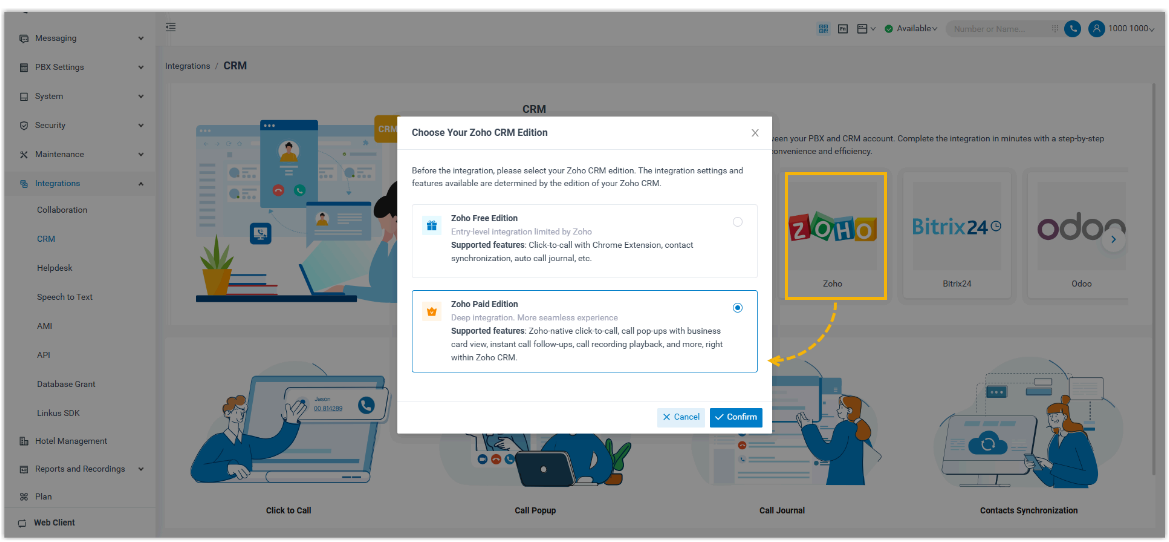
Note:
If you want to change the Zoho users allowed for accessing integration features, go to the Yeastar App and clicking on **Modify**.



Step 2. Authenticate the integration on Yeastar PBX

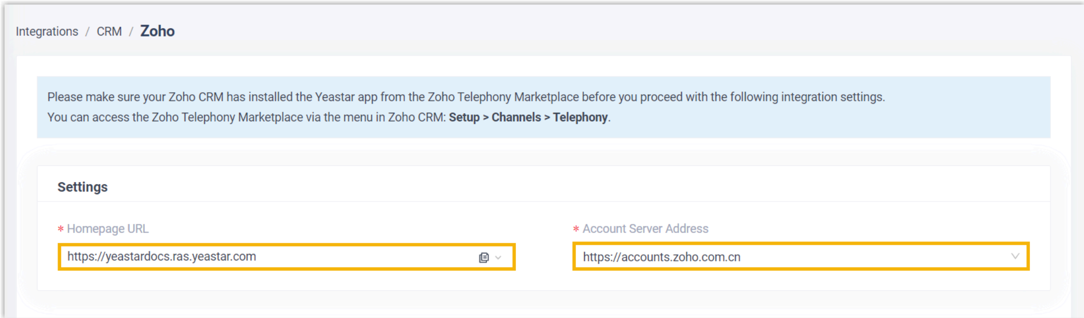
Important:
During this step, please DO NOT log out of your Zoho account.

1. Log in to PBX web portal, go to **Integrations > CRM > Zoho**, then select **Zoho Paid Edition**.



2. On Zoho integration page, complete the following settings.

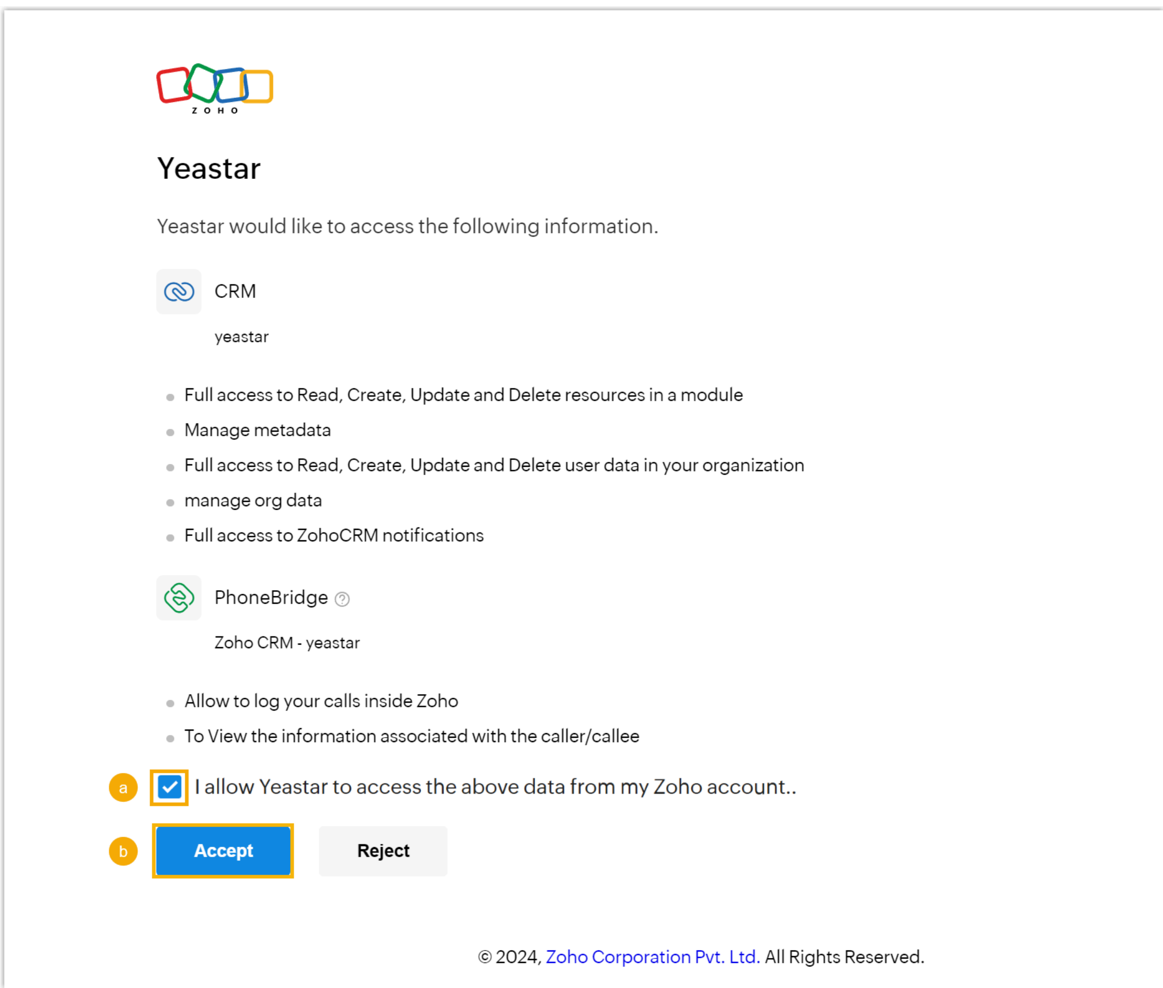
   a. In the **Settings** section, do as follows:



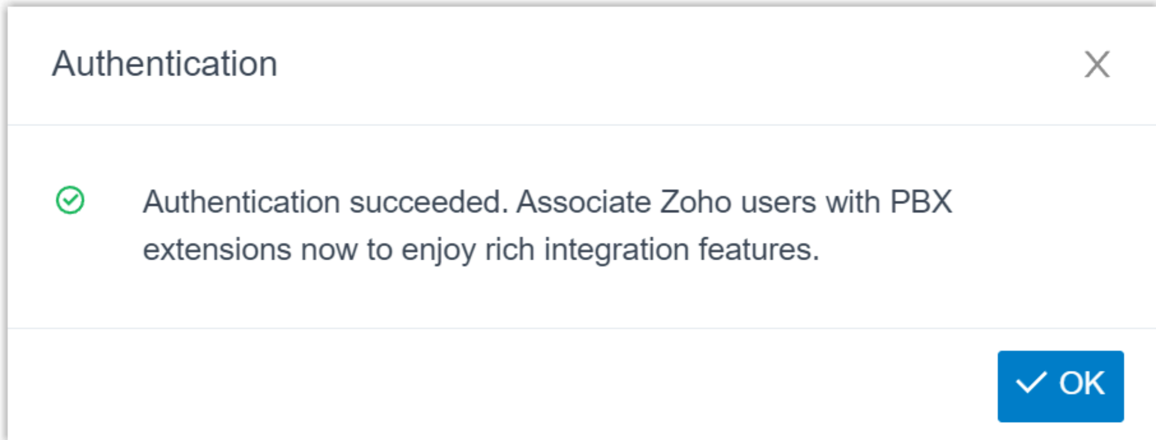
- **Homepage URL**: Confirm the FQDN of your PBX.
- **Account Server Address**: Select the Zoho Data Center URL corresponding to the region where your account is registered.

b. Click **Save**.

3. On the authorization page, review the access to be granted to the App, select the checkbox of the disclaimer, then click **Accept**.

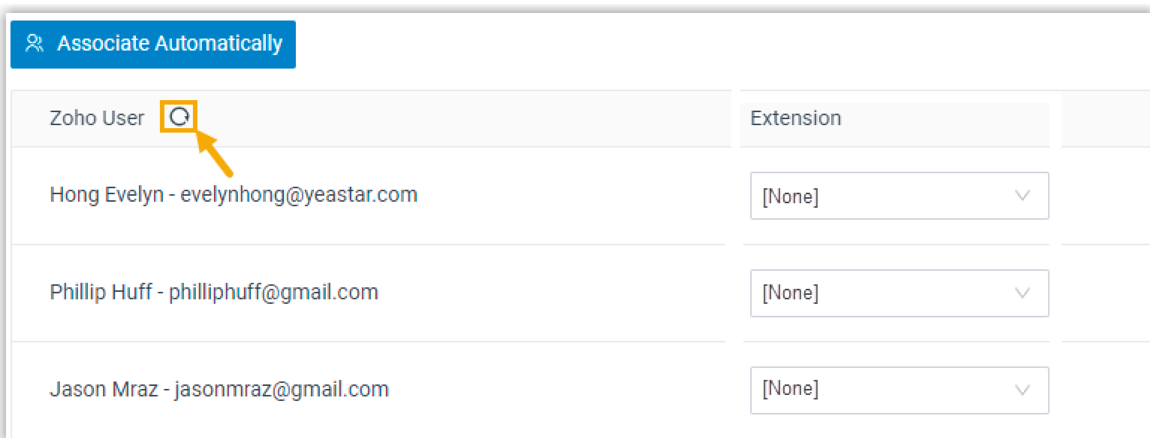


The system will automatically complete the authentication process. Once finished, a window pops up to indicate the authentication result, as shown below.



Step 3. Associate extensions with Zoho Users

1. On the CRM integration page, click beside **Zoho User** to obtain the latest Zoho CRM user list.



2. Associate Zoho users with PBX extensions.

Associate automatically

If users bind the same email address to their Zoho accounts and PBX extensions, you can implement automatic association of their Zoho accounts and PBX extensions.

a. Click **Associate Automatically**.

b. In the pop-up window, click **OK**.

c. Click **Save**.

Associate manually

If users bind different email addresses to their Zoho account and PBX extension, you need to manually associate users' Zoho account and PBX extension.

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

Result

- The integration of Yeastar P-Series PBX System and Zoho CRM is set up.
- The associated Zoho users can make or receive calls with their PBX extensions.

What to do next

- Set up Contact Synchronization from Zoho CRM
- Set up Lead or Contact Creation for Zoho CRM
- Set up Call Journal to Zoho CRM

Set up Contact Synchronization from Zoho CRM

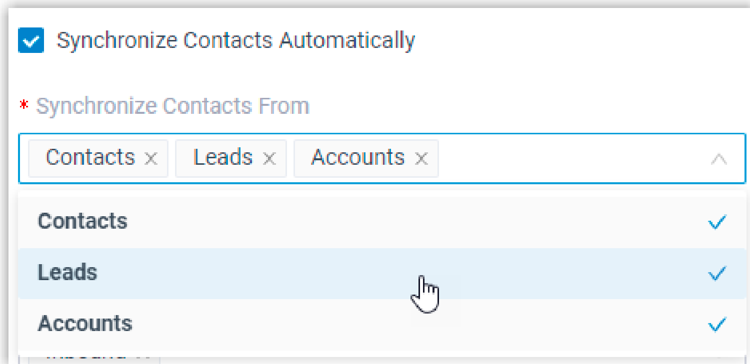
After integrate with Zoho CRM, you can enable a one-way contact synchronization on PBX to sync the Zoho CRM Contacts to a specific PBX phonebook.

Prerequisites

The Zoho CRM integration is completed.

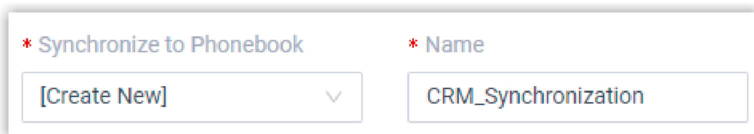
Procedure

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 types of contacts to be synchronized from Zoho CRM.

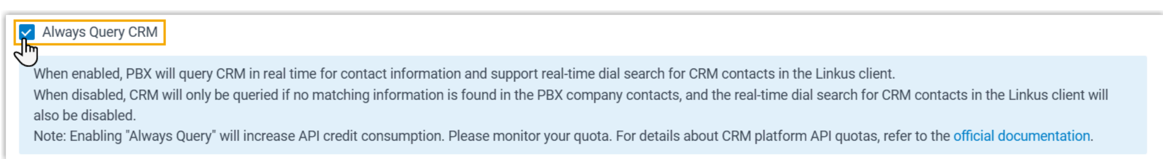


4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from Zoho CRM.

> **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.



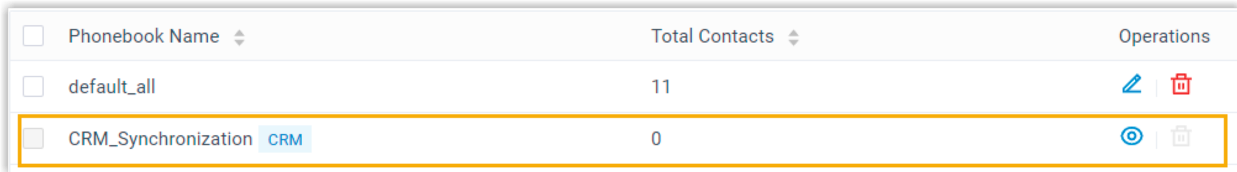
- If enabled, PBX will query CRM in real time for contact information, and support real-time dial search for CRM contacts in the Linkus clients of the associated extension users.
- If disabled, PBX will only query CRM when there is no matching information found in the PBX company contacts.

> **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 the specified type of Zoho 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 PBX System.

Note:

- This is a one-way sync to Yeastar P-Series PBX System, therefore the associated phonebook and the synced contacts are read-only.
- If the information of synchronized contacts is updated in Zoho CRM, the change will be automatically synchronized to PBX in 30 minutes.

Troubleshooting:
[Why did PBX fail to synchronize the existing contacts in Zoho CRM?]

Set up Lead or Contact Creation for Zoho CRM

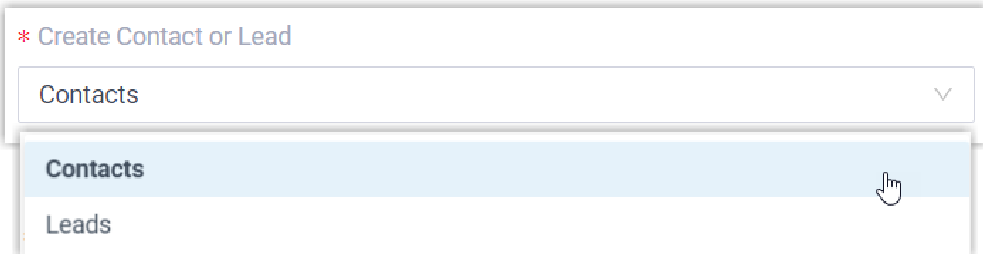
After integrate with Zoho CRM, you can set up automatic or manual lead or contact creation. If enabled, a new contact or lead can be created on the CRM when the user receives a call from an unknown number or places a call to an unknown number. This feature helps you to build your contact database efficiently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

Prerequisites

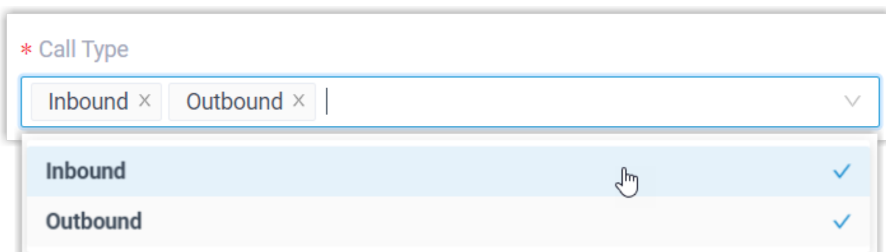
The Zoho CRM integration is completed.

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.

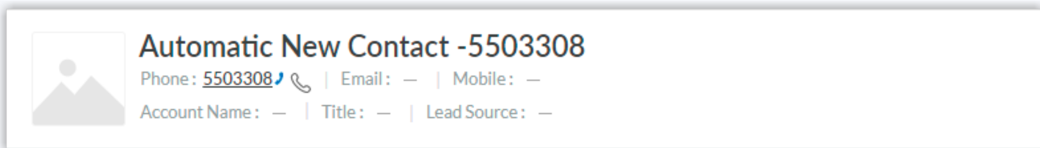
        

        - **Inbound**: Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
        - **Outbound**: Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
   - If you want to allow associated extension users to manually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

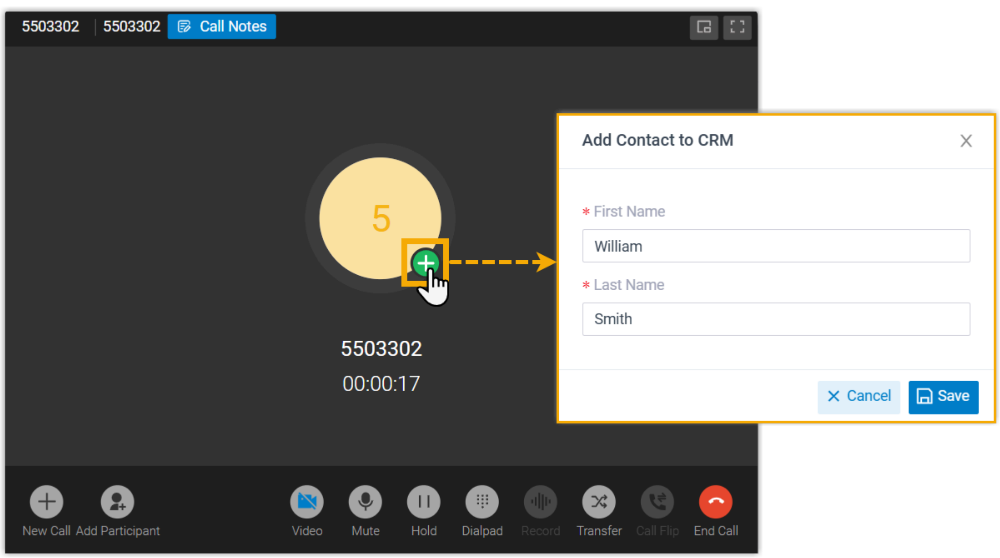
Result

- If automatic creation is configured, when a call is placed to a unknown number or a call is received from a unknown number, a new contact or lead will be created in Zoho 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 PBX System.

Enable Call Recording Playback in Zoho CRM

After the integration, call logs can be automatically synchronized to Zoho CRM when an associated user ends calls with Zoho CRM contacts. You can set up to enable playing the call recordings of the corresponding call logs directly within Zoho CRM.

Prerequisites

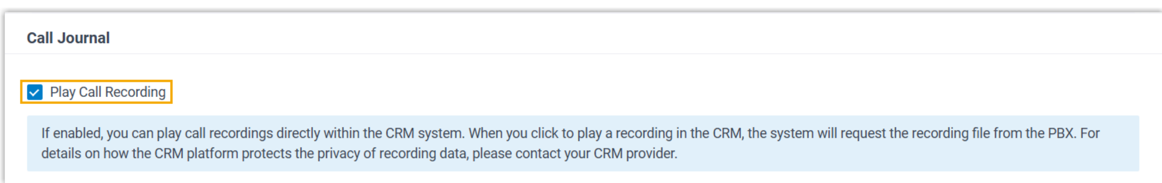
The Zoho CRM integration is completed.

Procedure

1. Log in to PBX web portal, go to **Integration > CRM**.
2. In the **Call Journal** section, select the checkbox of **Play Call Recording**.

   When users click to play call recording in the CRM, the system will request recording file from the PBX.

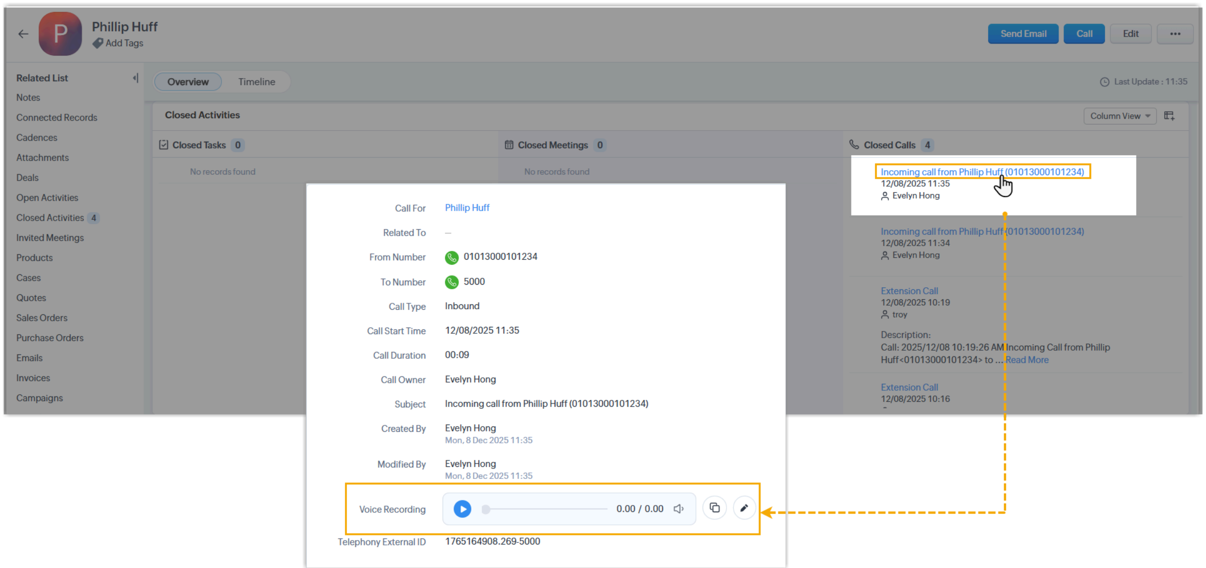
   > **Note:**
   > For details on how the CRM platform protects the privacy of recording data, please contact CRM provider.

3. Click **Save**.

Result

The Zoho CRM users who associated with extensions on PBX can directly view and play call recordings stored on the PBX within the CRM system.

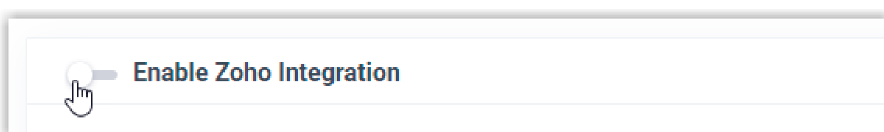


Disable Zoho CRM Integration

You can disable the Zoho 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 Zoho Integration** switch on the top.



3. Click **Save**.

Result

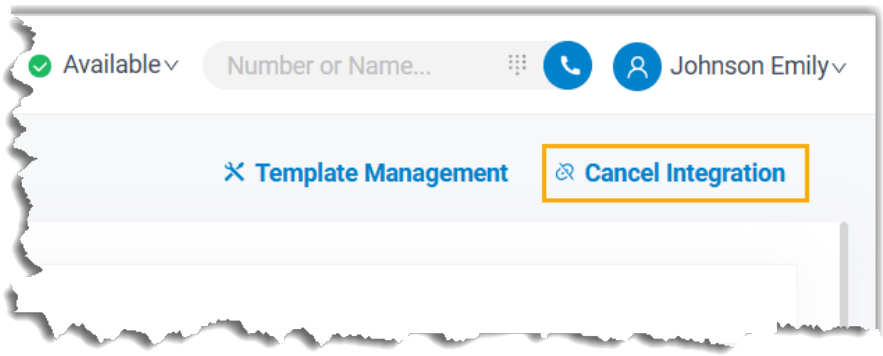
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

Disconnect Zoho CRM Integration

When 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 Zoho 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.