

# Zoho CRM Integration Guide

Yeastar P-Series Appliance Edition

Version: 1.0

Date: 2023-10-11



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# 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. This topic is intended to provide you with the requirements, key features, and terminologies related with the integration.

## Requirements

- **Zoho CRM editions:** 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 37.4.0.17 or later

## Key features

The integration of Yeastar P-Series PBX System with Zoho CRM 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 an inbound call from 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 Zoho 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 Zoho CRM integration.

**Table 1.**

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.
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.

## Related information

[Integrate Yeastar P-Series PBX System with Zoho CRM](#)

[Set up Contact Synchronization from Zoho CRM](#)

[Set up Automatic Lead or Contact Creation for Zoho CRM](#)

[Use Zoho CRM Integration](#)

[Disable Zoho CRM Integration](#)

[Disconnect Zoho CRM Integration](#)

# Set up Zoho CRM Integration

## 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 accessed via Yeastar FQDN.

For more information about the configuration, see [Configure Network for Remote Access by a Yeastar FQDN](#).

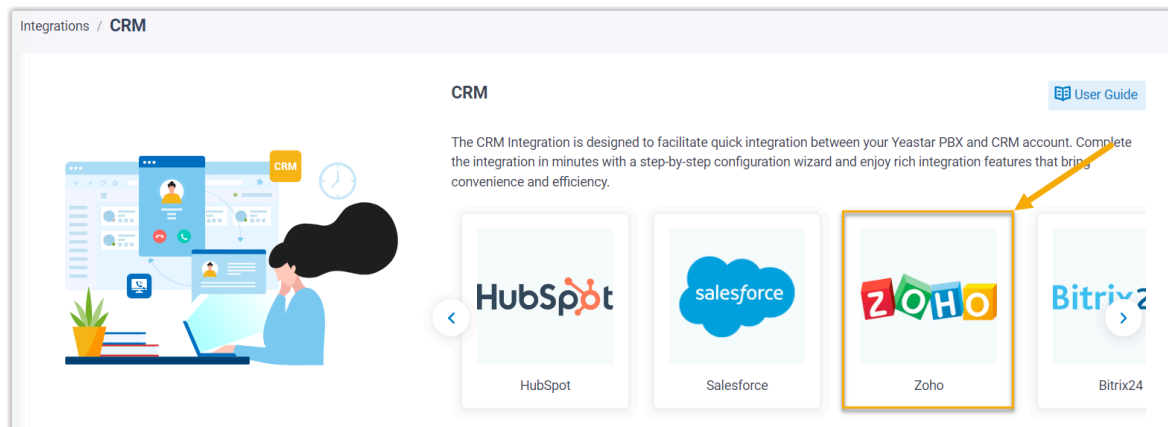
- Only an Administrator of a Zoho CRM account can enable the Zoho CRM integration.

### 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**.



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.

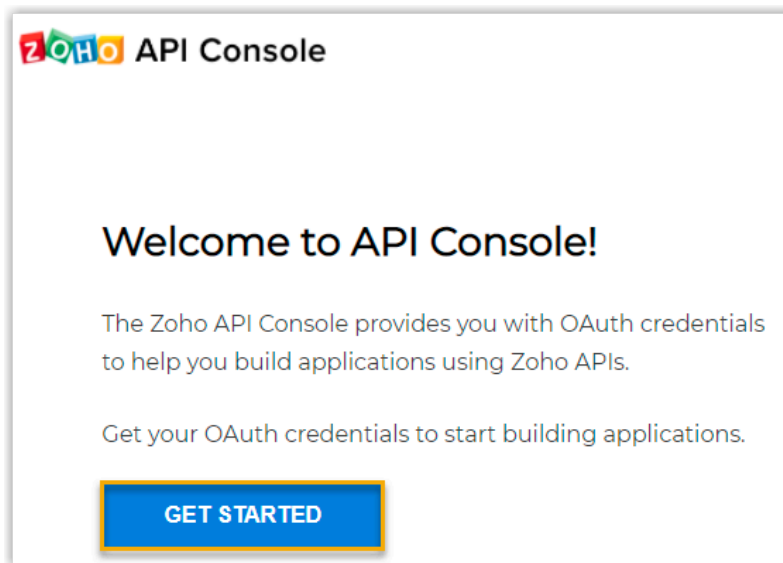
A redirect URI according to the selected Homepage URL is automatically generated in the **Authorized Redirect URI** field.

<b>* Homepage URL</b> <input type="text" value="https://docs.ras.yeastar.com"/>	<b>* Authorized Redirect URI</b> <input type="text" value="https://docs.ras.yeastar.com/integration/callback/api/crm/zoho/"/>
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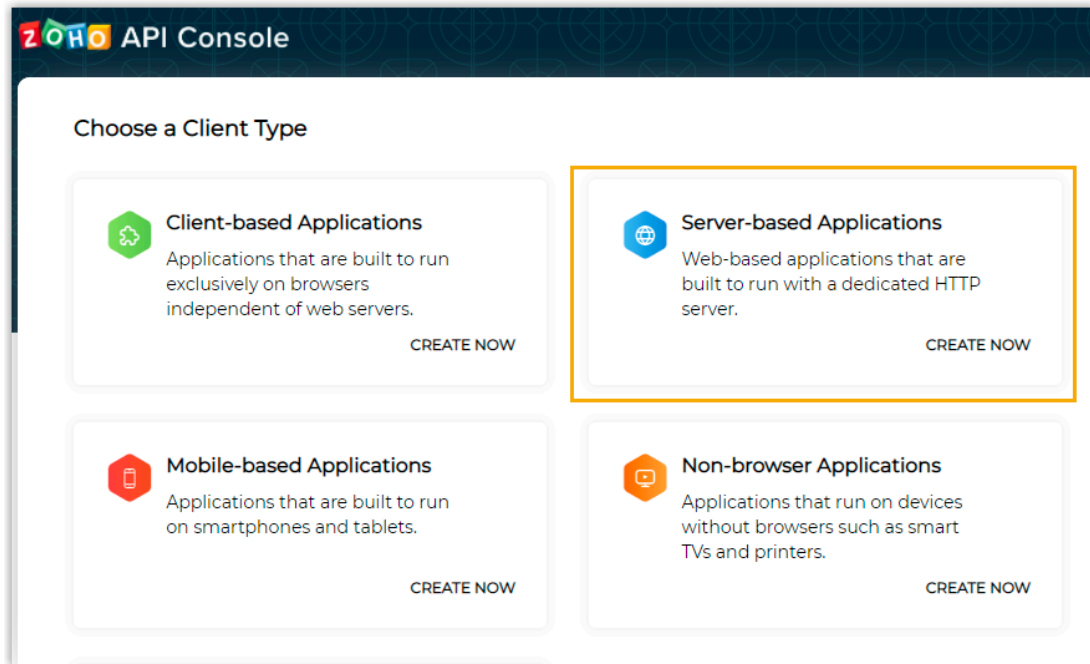
4. Take note of the Homepage URL and the redirect URI as you will use them later on Zoho CRM.

## 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.



## Create New Client

Client Type

Server-based Applications

Client Name

my pbx

Homepage URL

https://docs.ras.yeastar.com

Authorized Redirect URIs

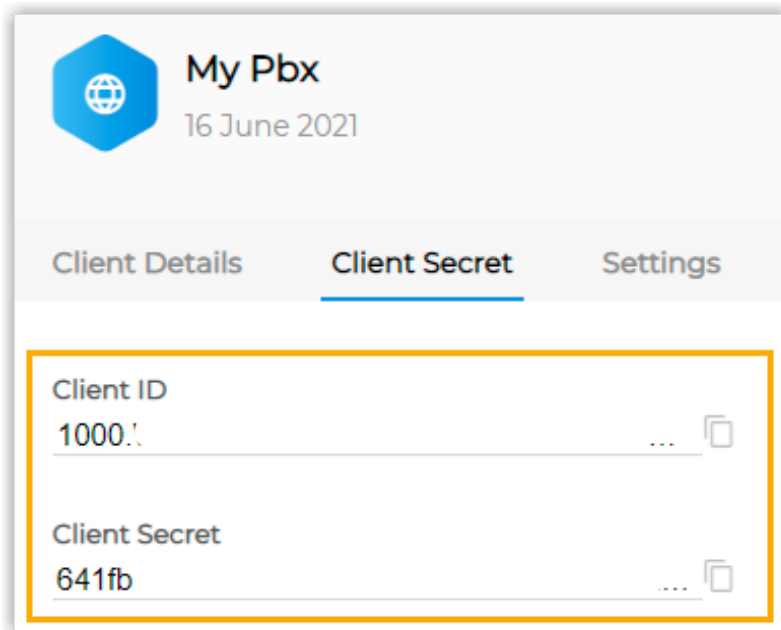
https://docs.ras.yeastar.com/integration/callba...

+

CREATE

- **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.



**My Pbx**  
16 June 2021

Client Details   **Client Secret**   Settings

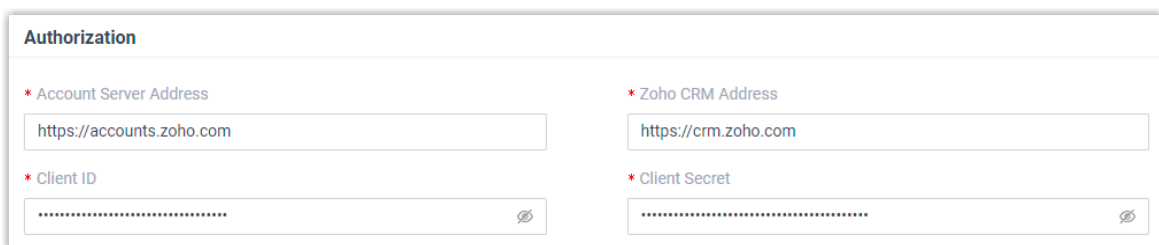
Client ID  
1000.1

Client Secret  
641fb

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.



**Authorization**

\* Account Server Address  
https://accounts.zoho.com

\* Zoho CRM Address  
https://crm.zoho.com

\* Client ID  
.....

\* Client Secret  
.....

- **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.



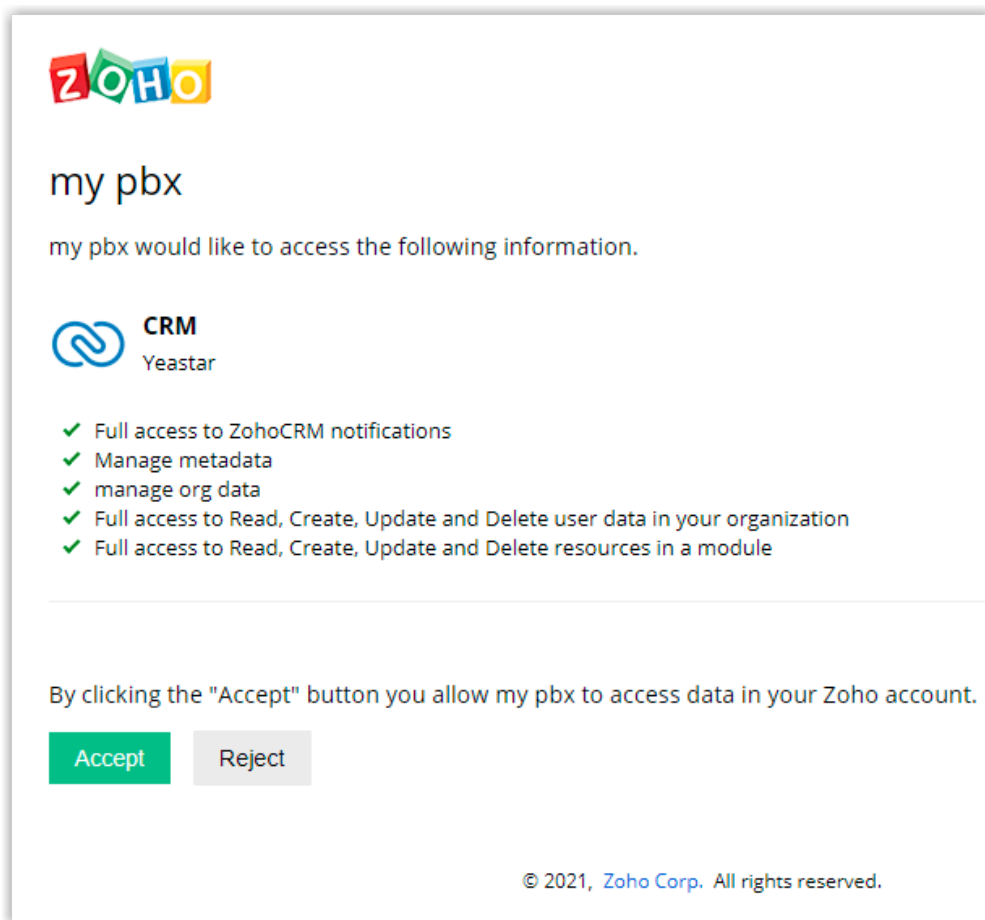
**Note:**

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.



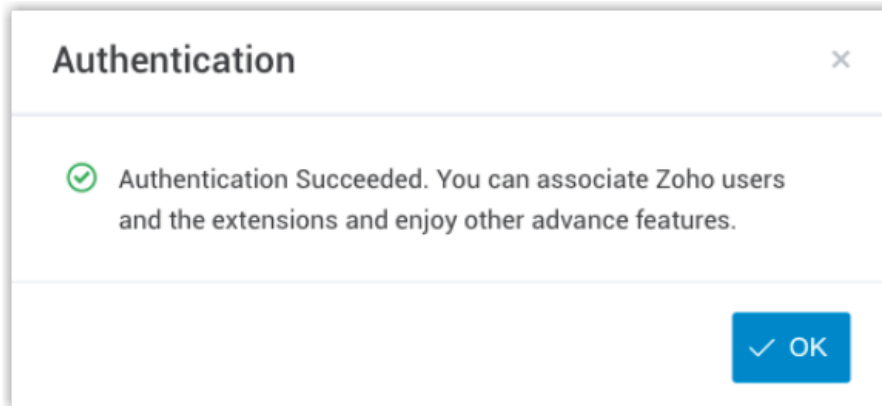
5. Click **Accept** to allow the PBX to access data in your Zoho account.

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

## Authorization succeeded!

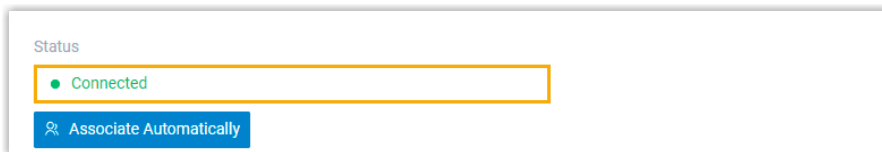
Please go to the PBX to associate CRM users with PBX extensions and enjoy rich integration features.

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

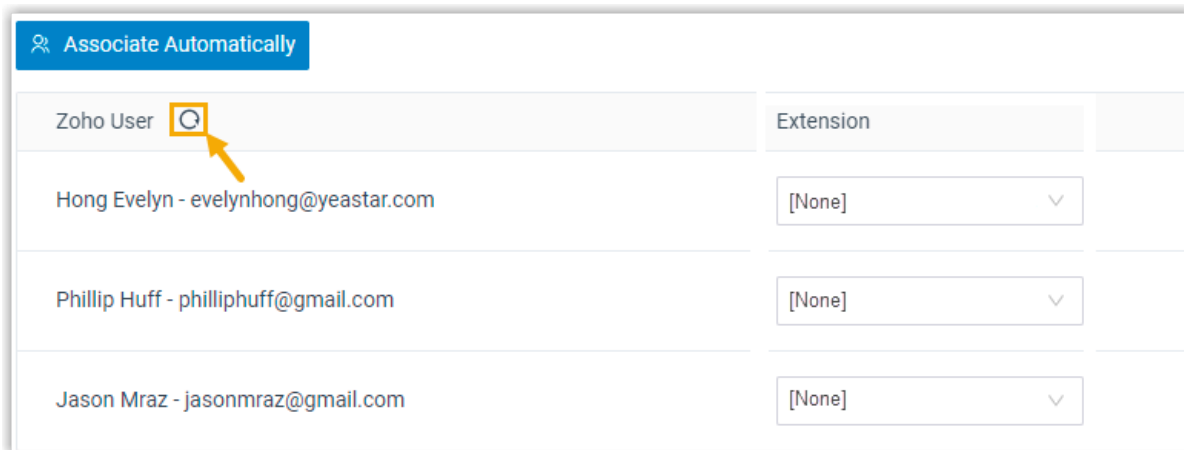



6. Click **OK** to confirm.

The **Status** field 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**.
- c. Click **Save**.

### 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** 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.
- 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 Automatic Lead or Contact Creation for Zoho CRM](#)
- [Use Zoho CRM Integration](#)

## Set up Contact Synchronization from Zoho CRM

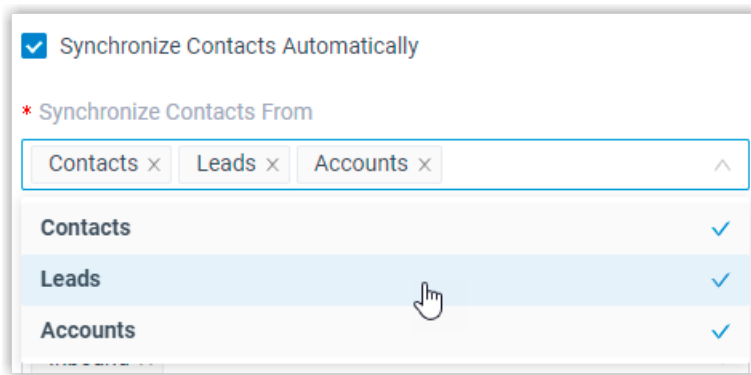
After integrate with Zoho CRM, you can enable a one-way contact synchronization on PBX to sync the Zoho CRM Contacts to a specific PBX phonebook.

## 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, select the checkbox of **Synchronize Contacts Automatically**.
3. In the **Synchronize Contacts From** drop-down list, select the types of contacts to be synchronized from Zoho CRM.

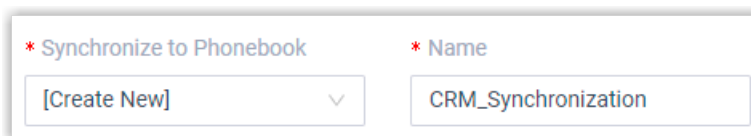


4. In the **Synchronize to Phonebook** drop-down list, select an existing empty phonebook or create a new phonebook to store the contacts that will be synchronized from Zoho CRM.



### Note:





The contacts can only be synchronized to an empty phonebook.



5. Click **Save**.

## Result

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

<input type="checkbox"/> Phonebook Name ▾	Total Contacts ▾	Operations
<input type="checkbox"/> default_all	11	 
<input type="checkbox"/> CRM_Synchronization CRM	0	 

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



#### 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 Automatic Lead or Contact Creation for Zoho CRM

After integrate with Zoho 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 ensures all contact information is captured.

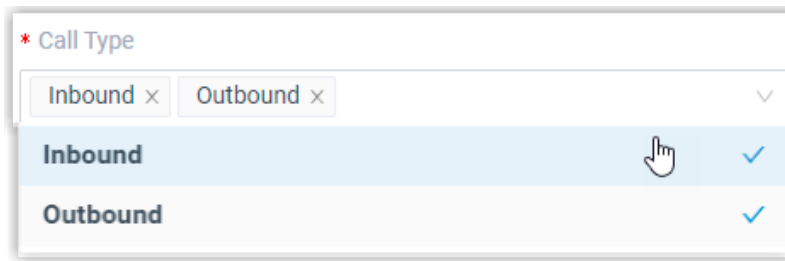
### Prerequisites

The [Zoho CRM integration](#) is completed.

### Procedure

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

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



- **Inbound:** Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
  - **Outbound:** Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
4. In the **Create Contact or Lead** drop-down list, select the information type to be created.
    - **Contact:** Save the unknown number as a Contact.
    - **Leads:** Save the unknown number as a Lead.
  5. Click **Save**.

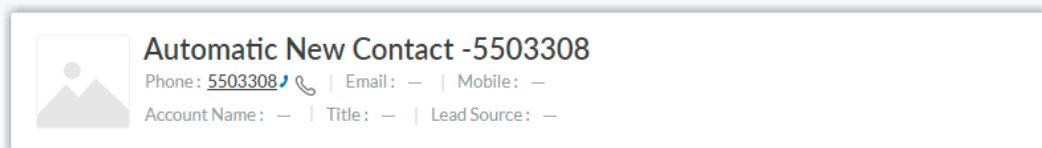
## Result

- When a call is placed to 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 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.





# 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.

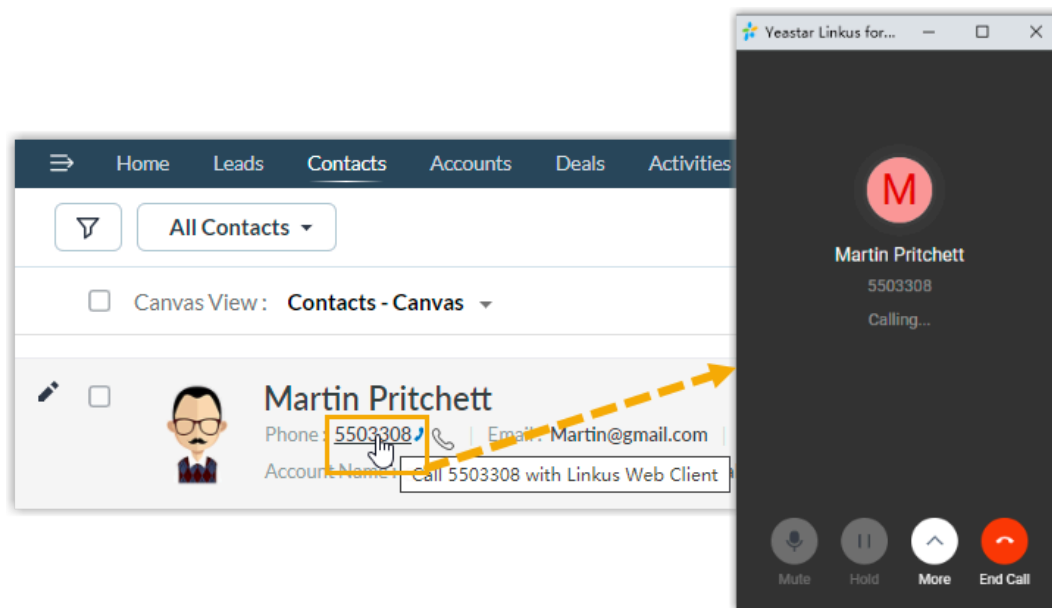
## Click to Call

### 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



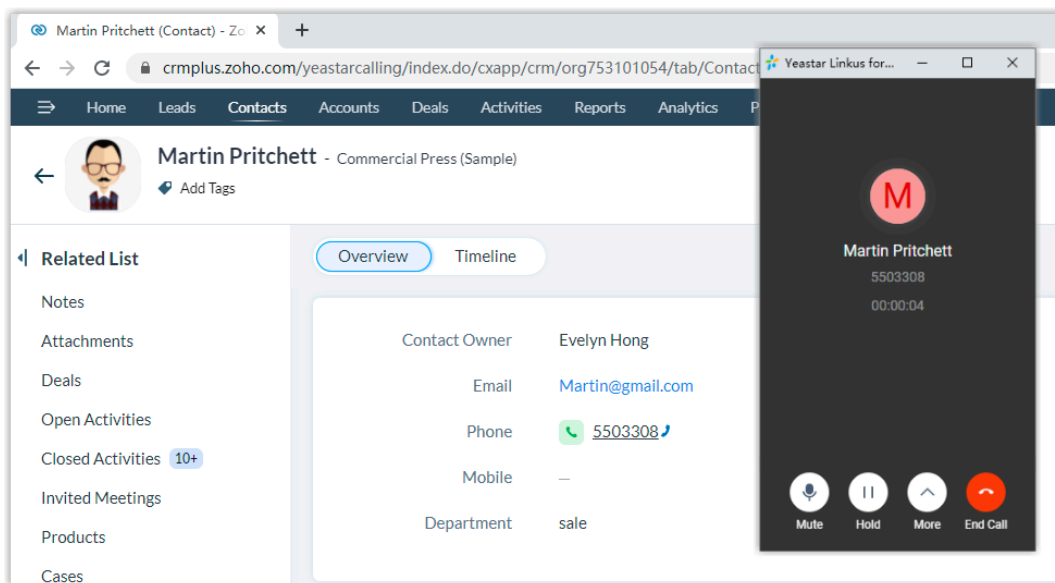
**Note:**



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.

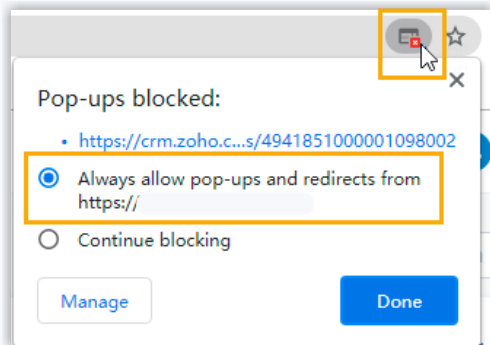
## Procedure

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



### Note:

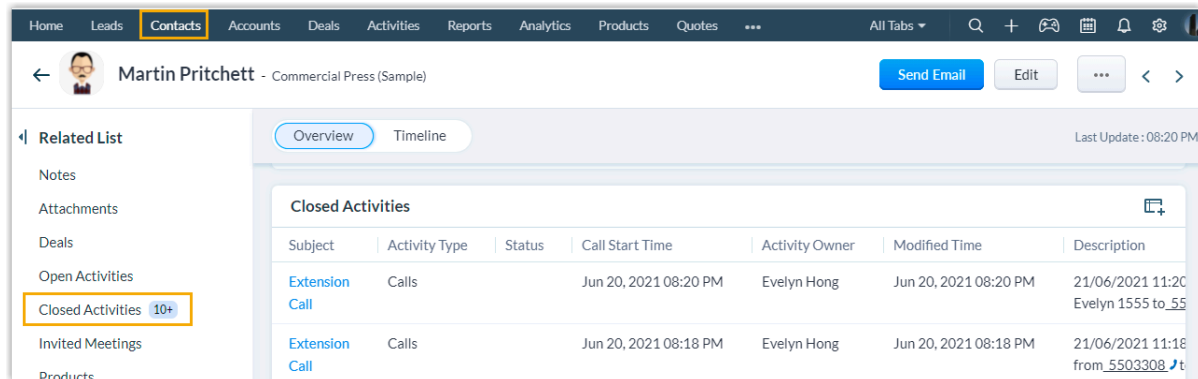
The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



## 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.

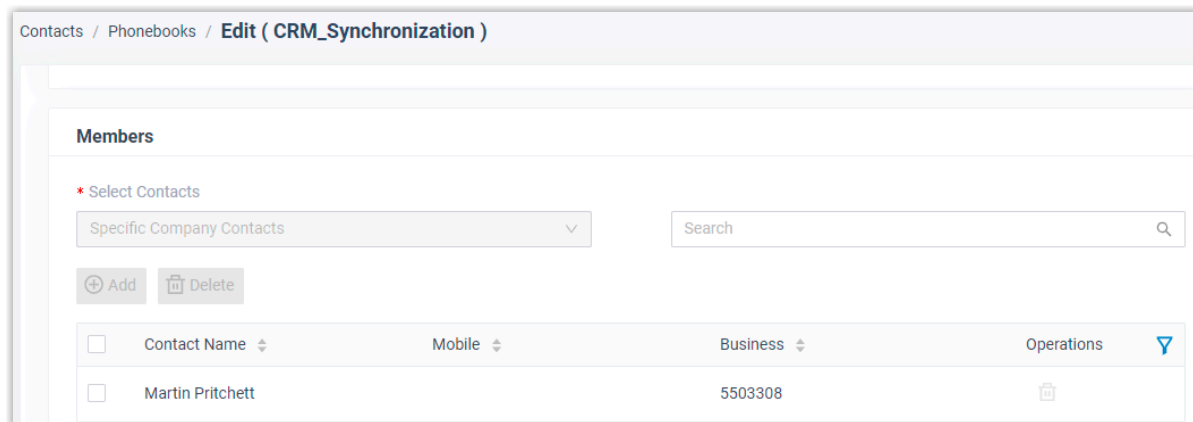
Users can log in to the Zoho CRM, go to the **Closed Activities** section in a contact detail page to view the call logs.



## Contact Synchronization

Inbound calls from Zoho contacts 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](#).




## Automatic Contact or Lead Creation

A new contact or lead will be created automatically 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 Automatic Lead or Contact Creation for Zoho CRM](#).



**Automatic New Contact -5503308**

Phone: [5503308](tel:5503308) 

Email: — | Mobile: —

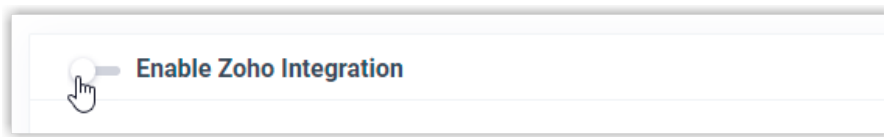
Account Name: — | Title: — | Lead Source: —

# 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

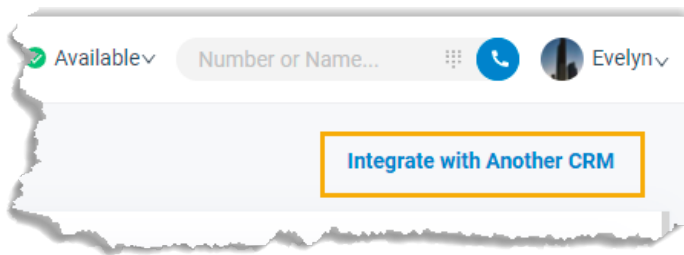
- The **Status** field displays **Disabled**.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

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



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.