

Zoho Desk Integration Guide

Yeastar P-Series Appliance Edition

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About This Guide

Yeastar P-Series PBX System supports to integrate with Zoho Desk platform, so as to combine phone system with customer support service. The integration allows Zoho Desk users to quickly get customers' profile and history call details on Zoho Desk while dealing with customer phone calls using their PBX extensions; it can also implement automatic ticket creation based on customer phone calls, so as to streamline the workflow of Zoho Desk users. This topic describes the requirements, key features, and terminologies related with the integration.

presented with the customer details and quick reference to the history of tickets raised for the customer

Requirements

Zoho Desk

- **Edition:** Free, Standard, Professional, or Enterprise

PBX server

- **Plan:** Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware:** Version 37.9.0.18 or later

Key features

The integration of Yeastar P-Series PBX System and Zoho Desk provides the following key features:

Click to Call

Users can launch calls by a single click on the detected numbers from Zoho Desk 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 Zoho Desk contact.

Call Journal

All the call activities get logged automatically to Zoho Desk when a user ends calls with Zoho Desk contacts.

Contact Synchronization

Synchronize Zoho Desk contacts to an associated PBX phonebook when a user receives calls from, or places calls to a Zoho Desk contact.

Automatic Contact or Account Creation

A new contact or account will automatically be created in Zoho Desk for unknown inbound calls or outbound calls.

Automatic Ticket Creation

A new ticket will automatically be created in Zoho Desk for inbound calls or outbound calls.

Terminologies

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

Table 1.

Term	Description
Zoho Desk administrator	An admin-level support user, including the super admin.
Zoho Desk user	The regular support users that are assigned tickets and interact with customers as needed to resolve support issues.
PBX extension	The extension number for Zoho Desk user. The users can register the extension on a phone or on Linkus Clients, and use the extension to make and receive calls.
Ticket	Tickets are the support issues that are raised by customers and need to be resolved.
Contact	Contacts, also known as end users, are individuals or customers who raise support tickets in Zoho Desk.
Account	Account is a company or an organization to which the contacts belong.

Related information

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

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

[Set up Automatic Contact or Account Creation for Zoho Desk](#)

[Set up Automatic Ticket Creation for Zoho Desk](#)

[Use Zoho Desk Integration](#)

[Disable Zoho Desk Integration](#)

[Disconnect Zoho Desk Integration](#)

Set up Zoho Desk Integration

Integrate Yeastar P-Series PBX System with Zoho Desk

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

Requirements

Zoho Desk

- **Edition:** Free, Standard, Professional, or Enterprise

PBX server

- **Plan:** Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware:** Version 37.9.0.18 or later

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](#).

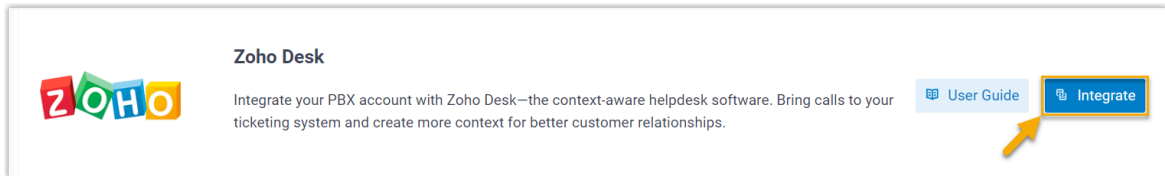
- Your Zoho account has administrator privileges in Zoho Desk.


Procedure

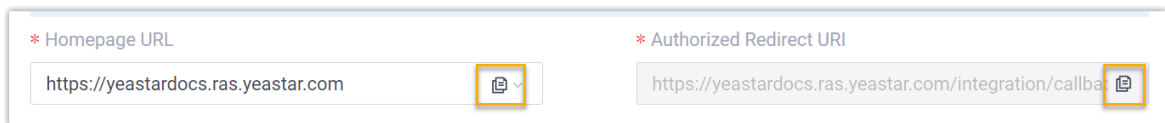
- [Step 1. Get authentication information from PBX](#)
- [Step 2. Register an application with Zoho](#)
- [Step 3. Make authorization request to Zoho Desk](#)
- [Step 4. Associate Zoho Desk users with PBX extensions](#)

Step 1. Get authentication information from PBX

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the right side of **Zoho Desk**, click **Integrate**.



3. In the **Network** section, click  to note down the following information, as you will use them when registering an application with Zoho.



- **Homepage URL:** The FQDN domain name of your PBX, which will be used to associate with a Zoho application.
- **Authorized Redirect URI:** The URI endpoint to which you will be redirected after successful authentication.

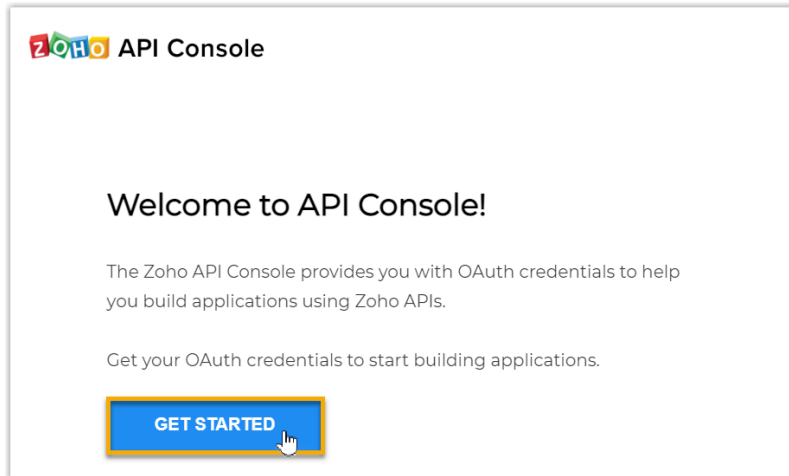
Step 2. Register an application with Zoho

1. Log in to [Zoho API Console](#), and click **GET STARTED** to add an application.

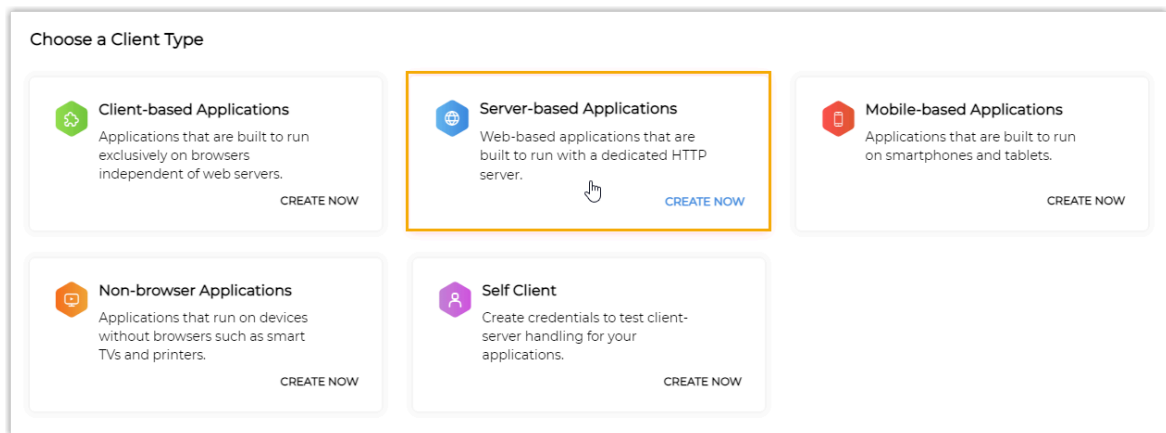


Tip:

If you already have applications in the API console, click **ADD CLIENT** on the top-right corner to add an application.



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



3. On the **Create New Client** page, complete the following settings.

Create New Client

Client Type
Server-based Applications

Client Name
Yeastar_P_Series_PBX

Homepage URL
https://yeastardocs.ras.yeastar.com

Authorized Redirect URIs
https://yeastardocs.ras.yeastar.com/integration...

CREATE

a. Fill in the following information.

- **Client Name:** Specify a name for the application.



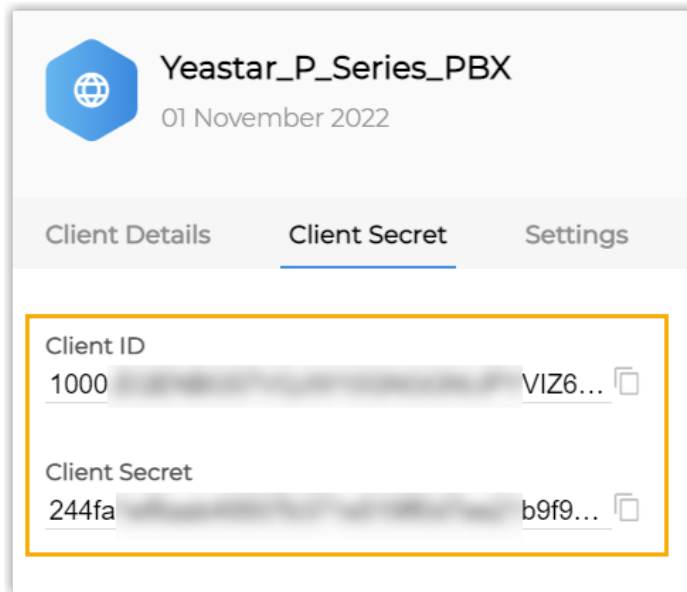
Note:

The name must not contain any special characters except `_` and `&`.

- **Homepage URL:** Paste the [PBX Homepage URL](#).
- **Authorized Redirect URIs:** Paste the [PBX authorized redirect URI](#).

b. Click **CREATE**.

A Client ID and a Client Secret are generated. Note down the Client ID and Client Secret, as you will need them later.



Yeastar_P_Series_PBX
01 November 2022

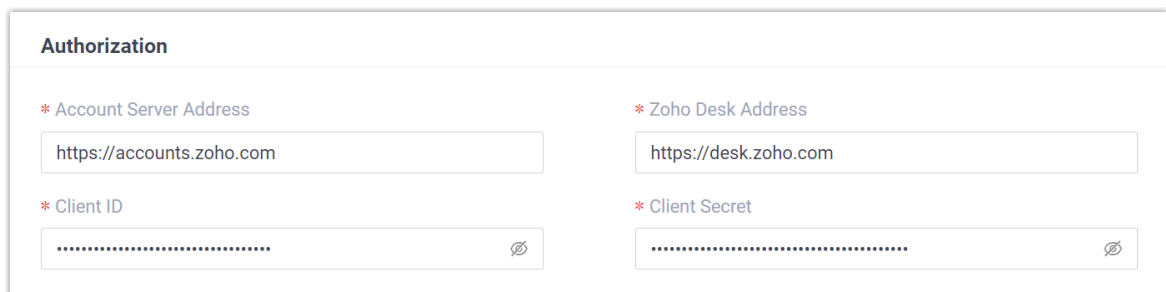
Client Details **Client Secret** Settings

Client ID
1000 VIZ6...

Client Secret
244fa b9f9...

Step 3. Make authorization request to Zoho Desk

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the right side of **Zoho Desk**, click **Integrate**.
3. In the **Authorization** section, fill in the following information.



Authorization

* Account Server Address

* Zoho Desk Address

* Client ID

* Client Secret

- **Account Server Address:** Enter the Zoho 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 Desk Address:** Enter the Zoho Desk URL.

**Note:**

The default URL `https://desk.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://desk.zoho.eu`.

- **Client ID:** Paste the Client ID of the Zoho application.
- **Client Secret:** Paste the Client Secret of the Zoho application.

4. Click **Save**.

A new browser web page is launched, indicating that the Zoho application requests to access data in your Zoho account.

ZOHO

Yeastar_P_Series_PBX

Yeastar_P_Series_PBX would like to access the following information.

Desk
 Yeastar_calling

- Search across data in your desk account.
- To create call activities
- To read, create, update and delete calls and its sub resources
- Read/Write contacts,accounts and their sub resources
- Full access to desk events
- Manage desk's all settings data such as customizations,automations,permissions,organization,license
- Read,Create,Update and Delete tasks in Zoho Connect
- To create activities such as tasks, calls and events
- Read/Write basic desk data such as organizations,agents,departments,roles,profiles
- Read/Write tickets and its sub resources

By clicking the "Accept" button you allow Yeastar_P_Series_PBX to access data in your Zoho account.

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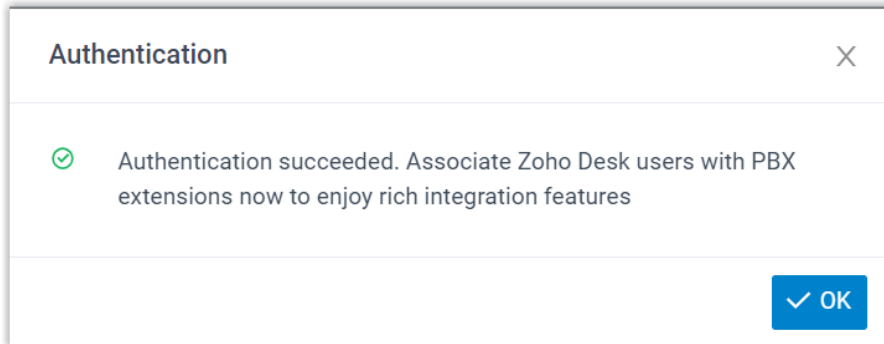
5. Click **Accept** to proceed.

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

Authorization succeeded!

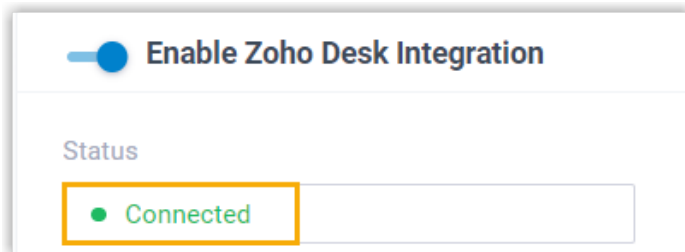
Please go to the PBX to associate Helpdesk users with PBX extensions and enjoy rich integration features.

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




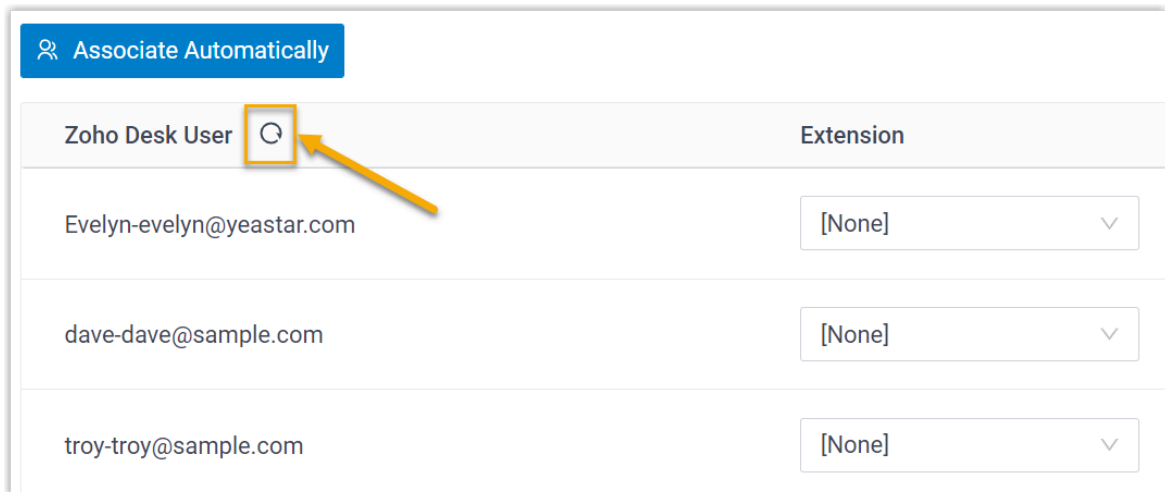
6. Click **OK** to confirm.

The **Status** field displays **Connected**, indicating that Yeastar P-Series PBX System is connected to Zoho Desk successfully.



Step 4. Associate Zoho Desk users with PBX extensions

1. On the Zoho Desk integration page of PBX, click  beside **Zoho Desk User** to obtain the latest list of Zoho Desk users.

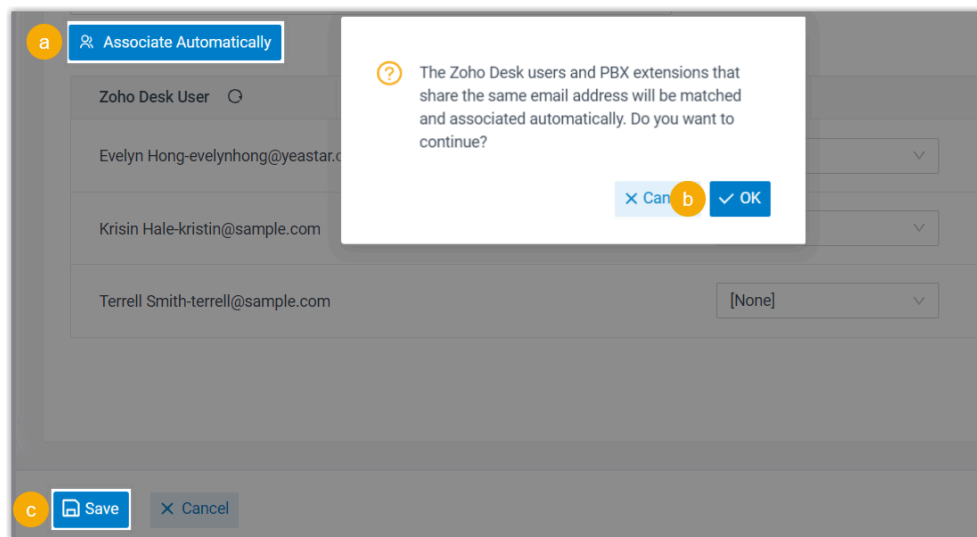


Zoho Desk User	Extension
Evelyn-evelyn@yeastar.com	[None] ▼
dave-dave@sample.com	[None] ▼
troy-troy@sample.com	[None] ▼

2. Associate Zoho Desk 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. Associate Automatically

?

The Zoho Desk users and PBX extensions that share the same email address will be matched and associated automatically. Do you want to continue?

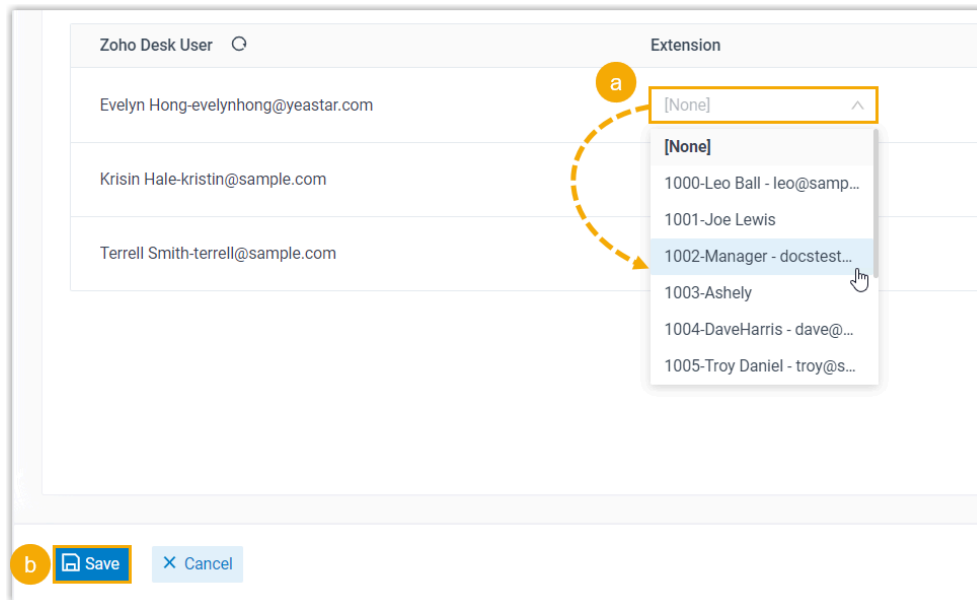
X Cancel b. OK

c. Save X Cancel

- Click **Associate Automatically**.
- On the pop-up window, click **OK**.
- Click **Save**.

Associate manually

If a user binds different email addresses to his or her 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 a desired Zoho Desk user, select the user's PBX extension.
- b. Click **Save**.

Result

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

What to do next

- [Set up Contact Synchronization from Zoho Desk](#)
- [Set up Automatic Contact or Account Creation for Zoho Desk](#)
- [Set up Automatic Ticket Creation for Zoho Desk](#)
- [Use Zoho Desk Integration](#)

Set up Contact Synchronization from Zoho Desk

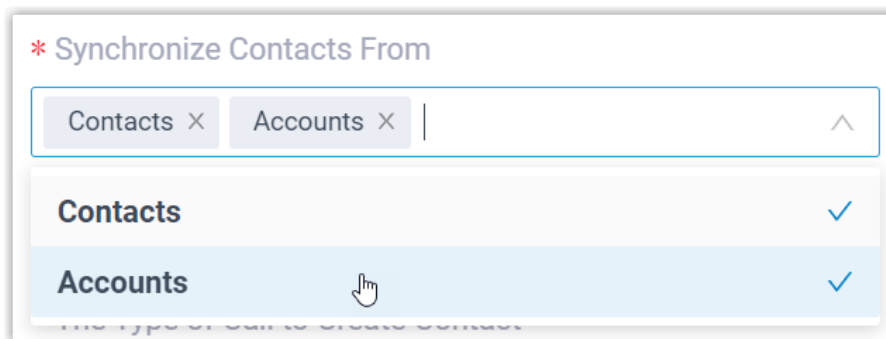
After integrating Yeastar P-Series PBX System and Zoho Desk, you can enable a one-way contact synchronization to synchronize the Zoho Desk contacts to a specific PBX phonebook.

Prerequisites

You have [integrated Yeastar P-Series PBX System with Zoho Desk](#).

Procedure

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



- **Contacts:** The individuals for whom Zoho Desk users provide support, which are stored in the Zoho Desk **Customers > Contact** module.
 - **Accounts:** The companies or organizations for which Zoho Desk users provide support, which are stored in the Zoho Desk **Customers > Account** module.
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 Desk.



Note:

The contacts can only be synchronized to an empty phonebook.

* Synchronize to Phonebook

[Create New]

[Create New]
Helpdesk_Synchronization

* Name

Helpdesk_Synchronization_new

5. Click **Save**.

Result

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

<input type="checkbox"/>	Phonebook Name	Total Contacts	Operations
<input type="checkbox"/>	All Company Contacts_Phonebook	4	
<input type="checkbox"/>	Helpdesk_Synchronization Helpdesk	0	

When the associated extensions receive an inbound call from or place an outbound call to a Zoho Desk contact, the matched contact information will be synchronized to the phonebook in Yeastar P-Series PBX System automatically.



Note:

This is a one-way sync from Zoho Desk to Yeastar P-Series PBX System, therefore the associated phonebook and the synced contacts are read-only.



Troubleshooting:

Fail to synchronize certain contacts?

Incomplete information of contacts can lead to synchronization failure. Make sure the following fields are filled in for the contacts, then perform the directory synchronization again:

- Either the **First name** or **Last name** field is filled in.
- At least one phone number-related field is filled in.

Set up Automatic Contact or Account Creation for Zoho Desk

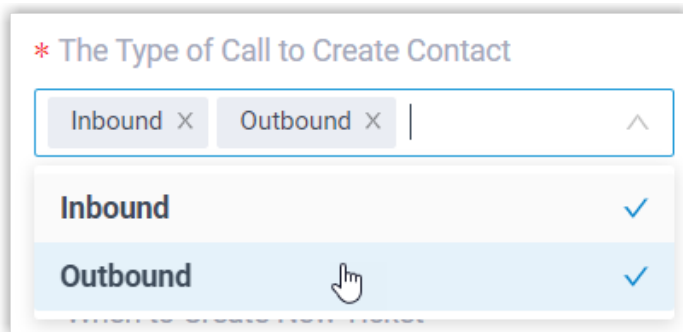
After integrating Yeastar P-Series PBX System with Zoho Desk, you can enable automatic contact or account creation. This feature helps Zoho Desk users build their contacts database, ensuring that all contacts are captured when unknown calls are received or placed in Zoho Desk.

Prerequisites

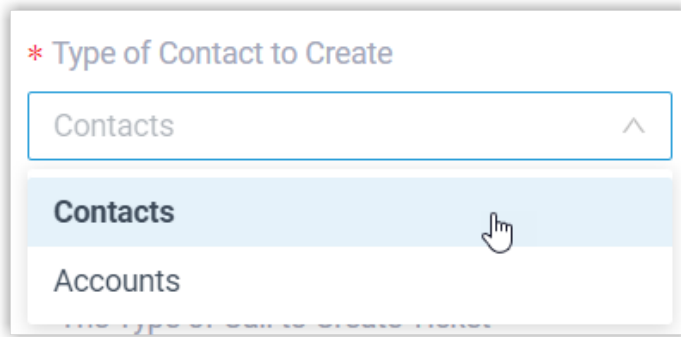
You have [integrated Yeastar P-Series PBX System with Zoho Desk](#).

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the Zoho Desk integration page, select the checkbox of **Create New Contact Automatically**.
3. In the **The Type of Call to Create Contact** drop-down list, select the desired call type(s).



- **Inbound:** Inbound call from an unknown number that doesn't match a Contact or Account already in the Zoho Desk.
 - **Outbound:** Outbound call to an unknown number that doesn't match a Contact or Account already in the Zoho Desk.
4. In the **Type of Contact to Create** drop-down list, select the type of contacts to be created.



- **Contacts:** Save the unknown number as a [Contact](#).
- **Accounts:** Save the unknown number as an [Account](#).

5. Click **Save**.

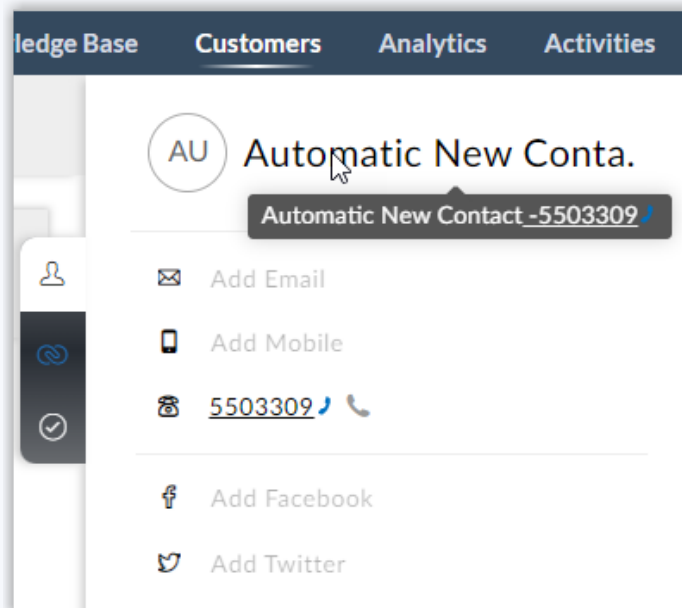
Result

- When a call is placed to an unknown number or a call is received from an unknown number, a new contact or account will be created in Zoho Desk.



Note:

The name of an auto-created contact or account has a prefix of `Automatic New Contact` OR `Automatic New Account`, followed by the phone number.



- If the [Contact Synchronization](#) feature is enabled, the new created contact or account will also be synchronized to the associated phonebook in Yeastar P-Series PBX System.

Add

Delete

<input type="checkbox"/>	Contact Name	Company	Email	Business	Mobile	Operations
<input type="checkbox"/>	Automatic New Contact...			5503309		
	Automatic New Contact -5503309					

Set up Automatic Ticket Creation for Zoho Desk

After integrating Yeastar P-Series PBX System with Zoho Desk, you can set up automatic ticket creation for Zoho Desk contacts, so as to automatically convert inbound calls and outbound calls into support tickets.



Note:

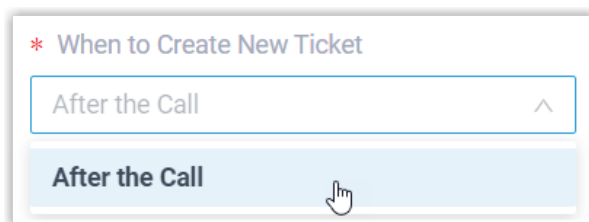
Due to limitations in Zoho Desk, the "Automatic Ticket Creation feature" is only available for **Contacts** and not for **Accounts**.

Prerequisites

You have [integrated Yeastar P-Series PBX System with Zoho Desk](#).

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the Zoho Desk integration page, select the checkbox of **Create New Ticket Automatically**.
3. In the **When to Create New Ticket** drop-down list, select the time point to create a new ticket.



- **After the Call:** A ticket will be created in Zoho Desk automatically when the Zoho Desk user ends the call with a contact.
4. In the **The Type of Call to Create Ticket** drop-down list, select specific call type(s) based on which a new ticket will be created.

* The Type of Call to Create Ticket

Inbound Answered × Inbound No Answer × Outbound Answered × ^

Outbound No Answer ×

Inbound Answered

Inbound No Answer

Outbound Answered

Outbound No Answer

- **Inbound Answered:** Inbound calls that are answered.
 - **Inbound No Answer:** Inbound calls that are missed.
 - **Outbound Answered:** Outbound calls that are answered.
 - **Outbound No Answer:** Outbound calls that are not answered.
5. Click **Save**.

Result

New tickets will be created for existing Zoho Desk **contacts** automatically based on the specified call types. Users can check the auto-created tickets on the details page of the Zoho Desk contacts.



Note:

If you have set up [automatically creating contacts for Zoho Desk](#), the system also creates new tickets for unknown inbound or outbound calls.

The screenshot displays the Zoho CRM interface for a contact named Phillip Huff (Yeastar-docs). The top navigation bar includes tabs for Customers, Analytics, Activities, Community, Social, and IM. The left sidebar shows contact details, including email, mobile, and social media links. The main area is divided into sections for ticket statistics and a list of tickets.

Overview Tab:

- Statistics:**
 - All Tickets: 1
 - Overdue Tickets: 0
 - Average Response Time: 00:00 hrs
 - Average Resolution Time: 00:00 hrs
- Tickets:** 1 Open

Ticket List:

Ticket ID	Status	From	To	Subject	Created Time	Resolution Time
#179	Inbound Completed	<5503301>	Evelynhong	<1000>	Nov 08 2022 09:09 PM	Open

A dashed orange arrow points from the 'OVERVIEW' tab to the ticket entry #179.

Use Zoho Desk Integration

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

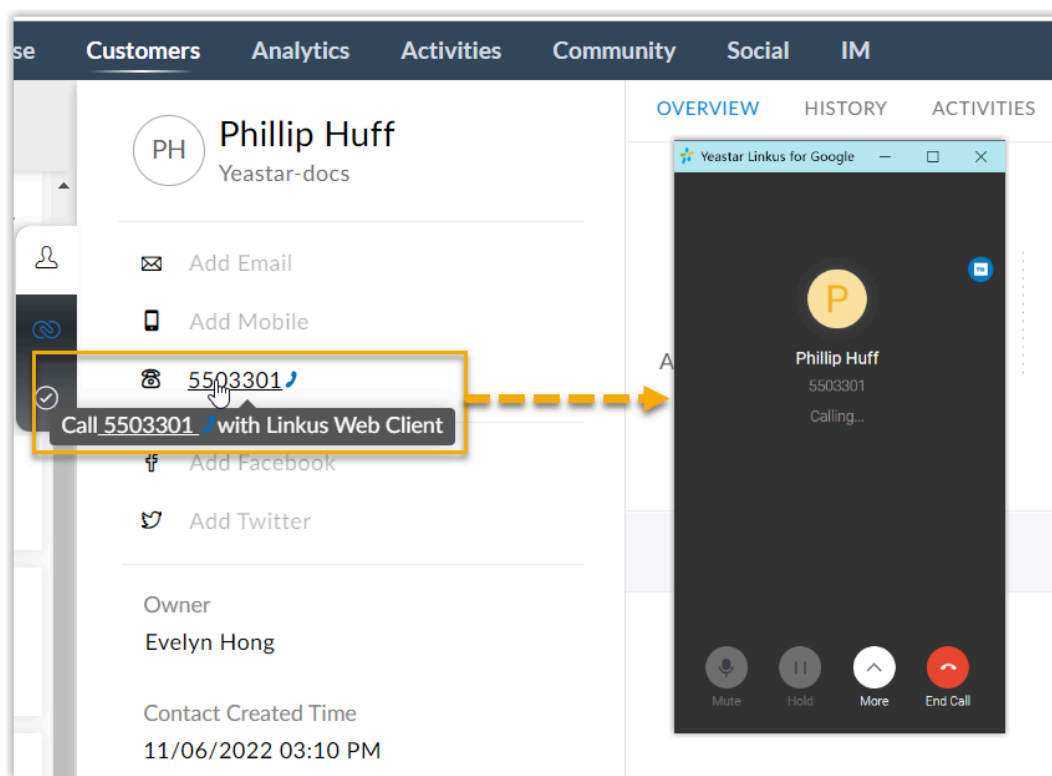
Click to Call

Prerequisites

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

Procedure

Users can click on any detected number on the Zoho Desk 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

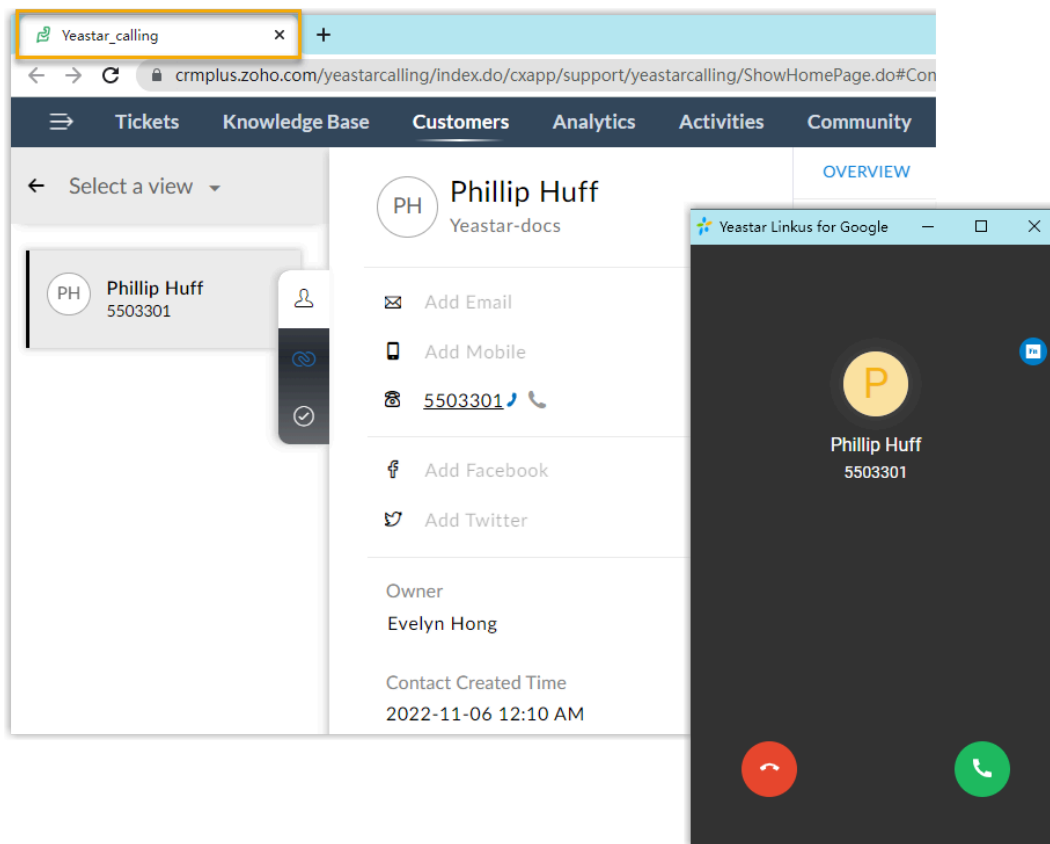


Note:

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.

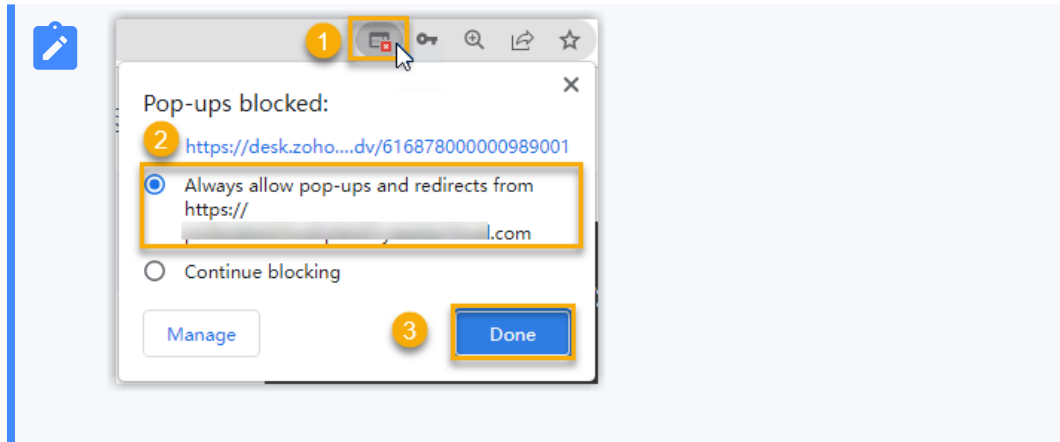
Procedure

When the extension associated with a Zoho Desk user receives an inbound call from a Zoho Desk contact, a new browser tab will be launched to show the 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

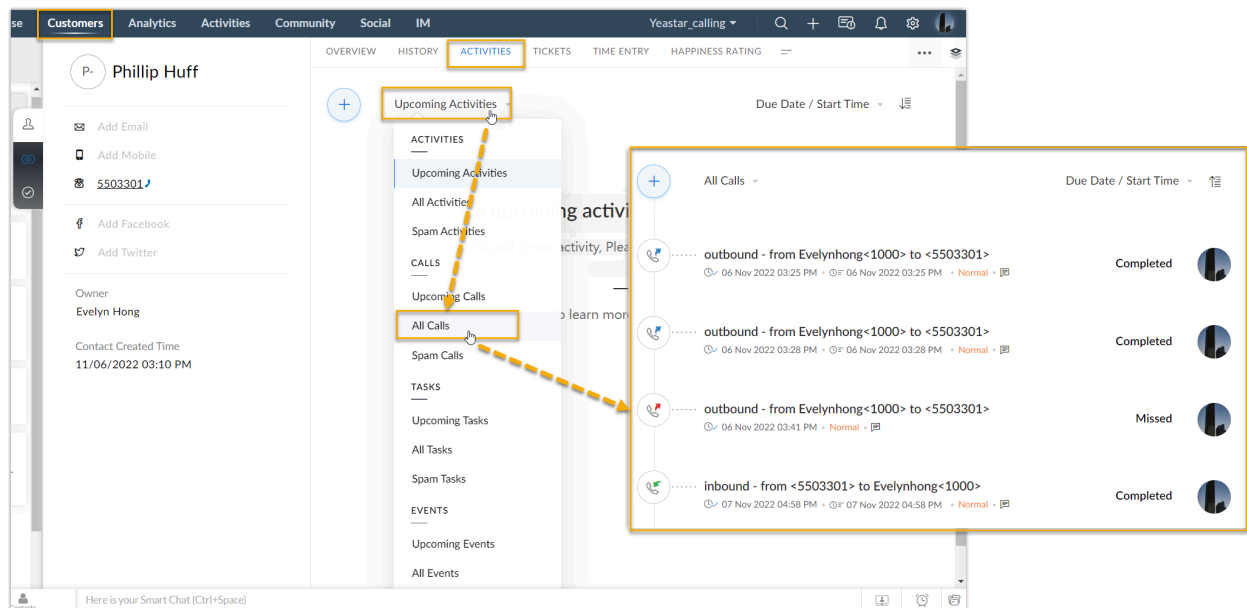


Note:

The feature is supported only if the edition of your Zoho Desk is **Standard, Professional, or Enterprise**.

All outbound calls, inbound calls, and missed call records will be logged to Zoho Desk automatically, which helps users to keep track of every conversation.

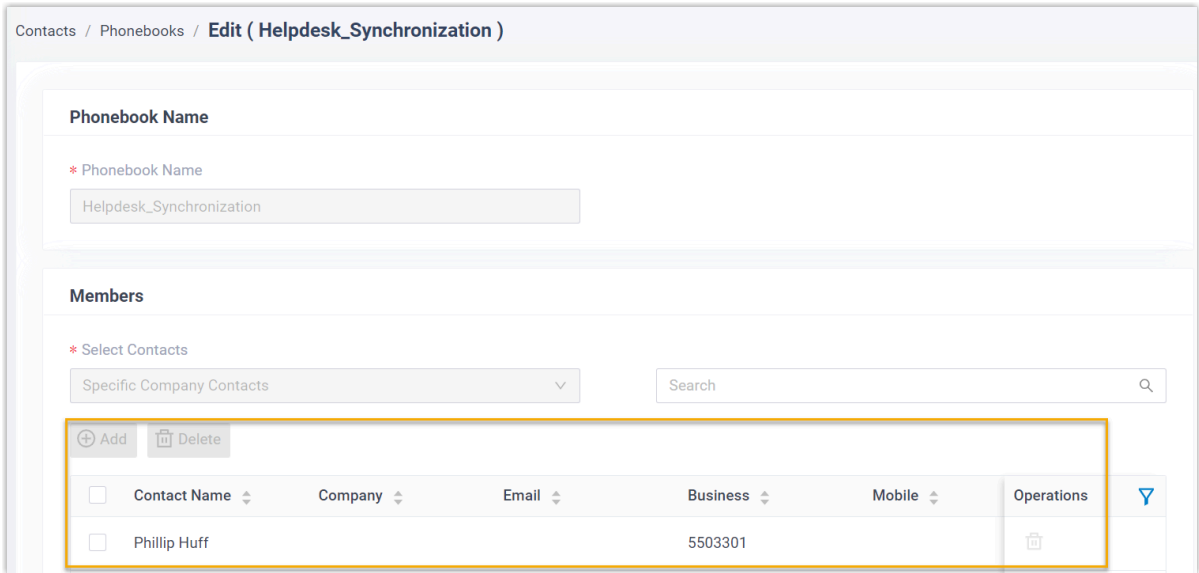
Users can check the call logs in the Zoho Desk contact's detail page on **ACTIVITIES > CALLS > All Calls**.



Contact Synchronization

Inbound calls and outbound calls will trigger a Zoho Desk contact lookup. If there exists the same number in Zoho Desk, the matched Zoho Desk contact will be synchronized to the associated PBX phonebook, and the synchronized contact is read-only.

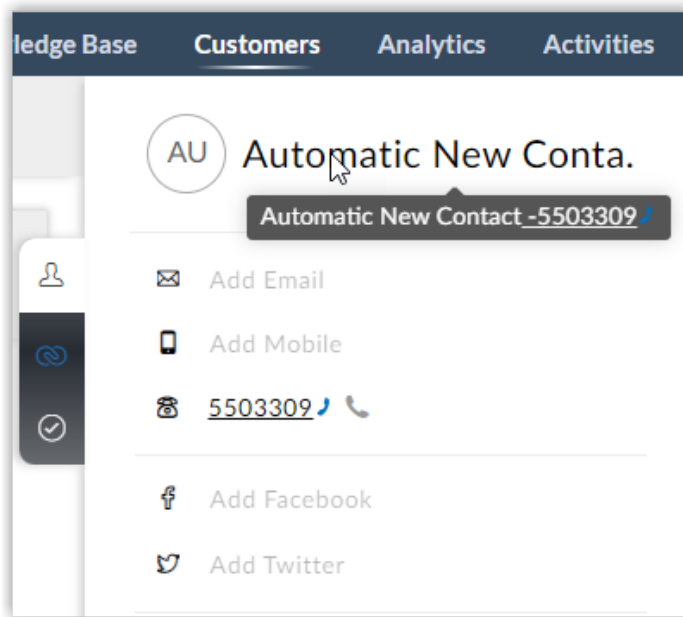
For more information, see [Set up Contact Synchronization from Zoho Desk](#).



Automatic Contact or Account Creation

A new contact or account will be created automatically in Zoho Desk when the associated extensions call or receive calls from an unknown number.

For more information, see [Set up Automatic Contact or Account Creation for Zoho Desk](#).



Automatic Ticket Creation

When the extension associated with a Zoho Desk user receives an inbound call from, or places an outbound call to a Zoho Desk contact, a new ticket will be created automatically in the contact's details page.



Note:

Due to limitations in Zoho Desk, the "Automatic Ticket Creation feature" is only available for **Contacts** and not for **Accounts**.

For more information, see [Set up Automatic Ticket Creation for Zoho Desk](#).

The screenshot displays the Yeastar CRM interface. The top navigation bar includes 'edge Base', 'Customers', 'Analytics', 'Activities', 'Community', 'Social', 'IM', and 'Yeastar_calling'. The left sidebar shows the contact profile for 'Phillip Huff' (Yeastar-docs) with options to add email, mobile, Facebook, and Twitter. The main area is divided into two sections. The top section, under the 'OVERVIEW' tab, shows statistics: 1 All Tickets, 0 Overdue Tickets, 00:00 hrs Average Response Time, and 00:00 hrs Average Resolution Time. The bottom section shows a list of tickets, with the first ticket highlighted: '#179 Inbound Completed - from <5503301> to Evelynhong<1000>'. A dashed orange arrow points from the 'OVERVIEW' tab to this ticket entry.

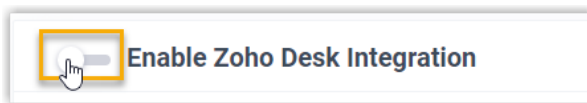
OVERVIEW	HISTORY	ACTIVITIES	TICKETS	TIME ENTRY	HAPPINESS RATING	PRODUCTS
<p>1 All Tickets</p> <p>0 Overdue Tickets</p> <p>00:00 hrs Average Response Time</p> <p>00:00 hrs Average Resolution Time</p> <p>1 Open</p> <p>#179 Inbound Completed - from <5503301> to Evelynhong<1000></p> <p>Yeastar-docs · Nov 08 2022 09:09 PM · Open</p>						

Disable Zoho Desk Integration

You can disable the Zoho Desk integration on Yeastar P-Series PBX System at any time when you want to pause the integration.

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the top of the Zoho Desk integration page, turn off the switch.



3. Click **Save**.

Result

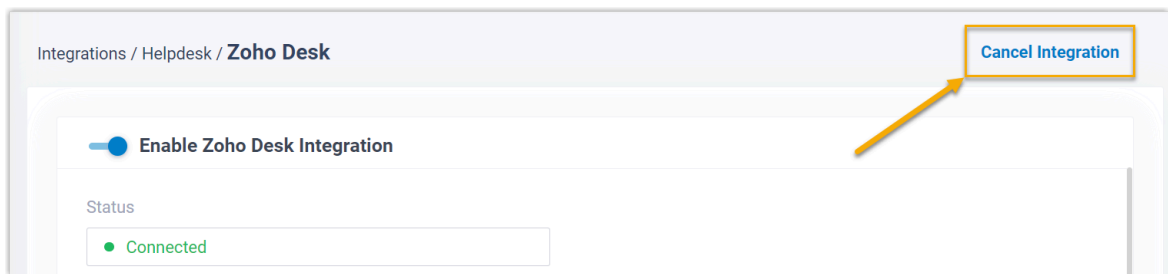
- The **Status** field displays **Disabled**.
- The Zoho Desk integration configurations are retained, and can be used directly the next time it is enabled.

Disconnect Zoho Desk Integration

When you want to integrate with another helpdesk service, you need to disconnect the current Zoho Desk integration first.

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the top-right corner of the Zoho Desk integration page, click **Cancel Integration**.



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

Result

- The Zoho Desk integration is disconnected.
- All the integration settings are cleared.
- The synchronized phonebook and contacts are retained on PBX, and can be edited now.