Zoho Desk Integration Guide

Yeastar P-Series Cloud Edition

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Contents

About This Guide

Yeastar P-Series Cloud Edition 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.

Requirements

Zoho Desk

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

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 84.21.0.66 or later

Key features

The integration of Yeastar P-Series Cloud Edition 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 / answer an inbound call from a Zoho Desk contact, or finish a call with a Zoho

Desk contact. In addition, users are able to manually open the contact's profile from the call window during a call with a Helpdesk 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.

Contact or Account Creation

A new contact or account can automatically or manually 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 Cloud Edition with Zoho Desk](#)
[Set up Contact Synchronization from Zoho Desk](#)

Set up Zoho Desk Integration

Integrate Yeastar P-Series Cloud Edition with Zoho Desk

This topic describes how to integrate Yeastar P-Series Cloud Edition with Zoho Desk.

Requirements

Zoho Desk

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

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 84.21.0.66 or later

Prerequisites

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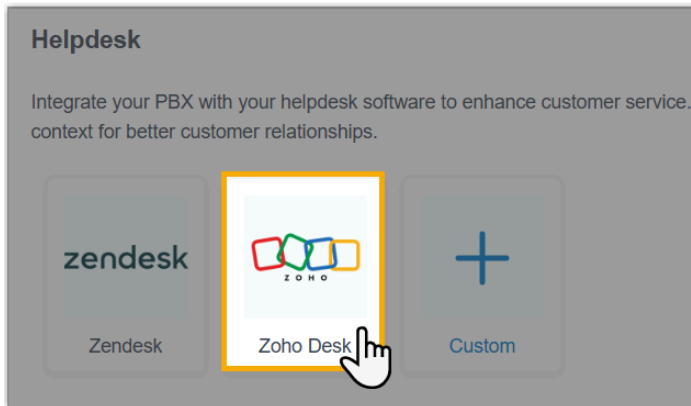
3. In the **Network** section, click 🗐 to note down the following information, as you will use them when registering an application with Zoho.

- **Homepage URL**: The 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.
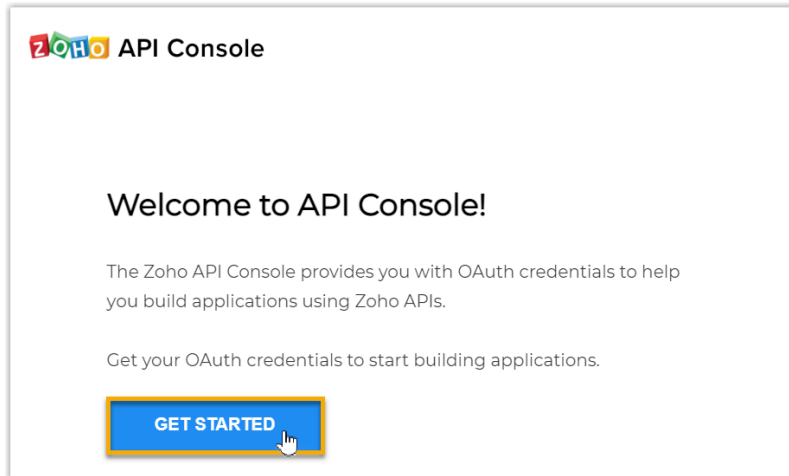
Step 2. Register an application with Zoho

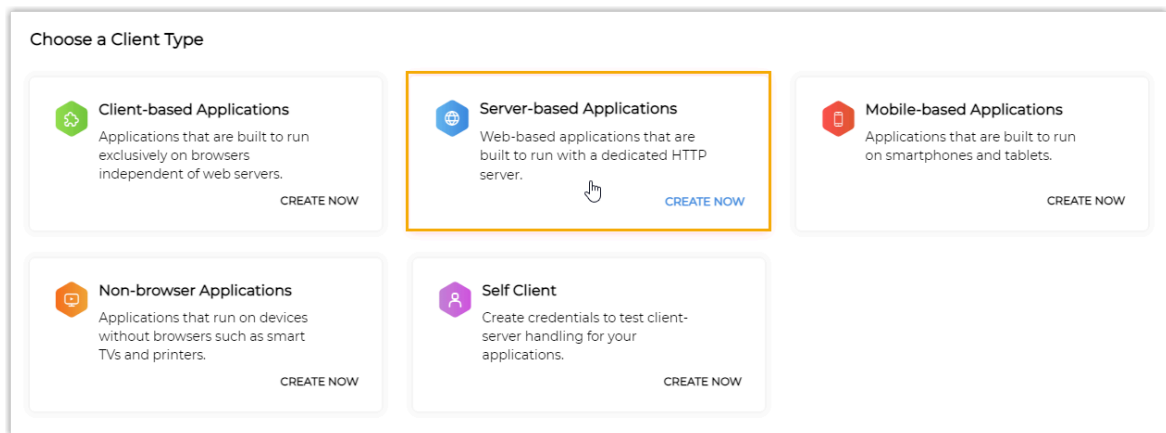1. Log in to [Zoho API Console](#), and click **GET STARTED** to add an application.

> ℹ️ **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.

a. Fill in the following information.

- **Client Name**: Specify a name for the application.
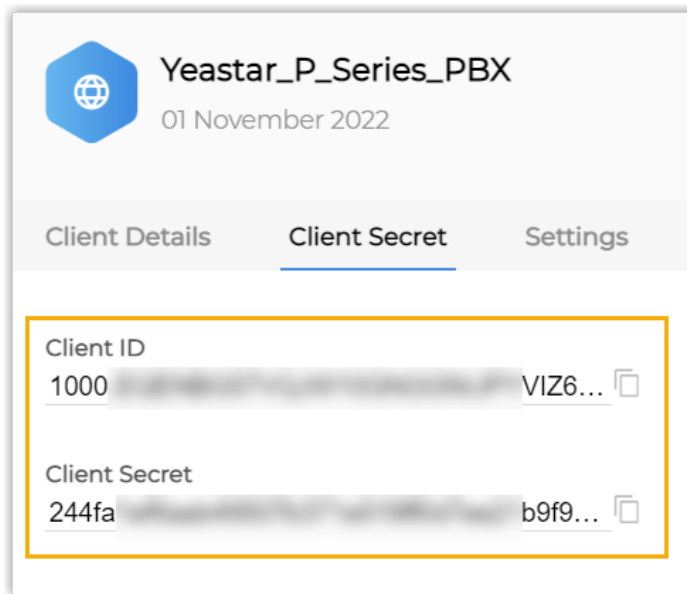
    > ✏️ **Note:**
    > The name must not contain any special characters except _ and &.

- **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.
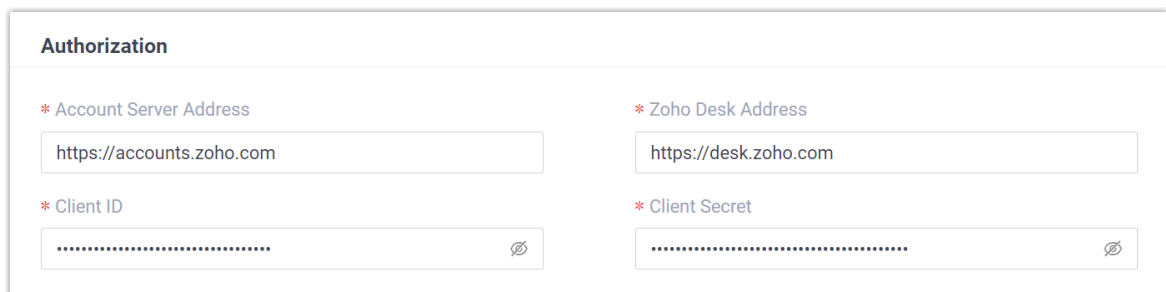
Step 3. Make authorization request to Zoho Desk

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.

- **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.

5. In the authorization page, select the checkbox of the disclaimer, and click **Accept** to proceed.

You are redirected to the PBX configuration page, a pop-up window displays the integration authentication result.
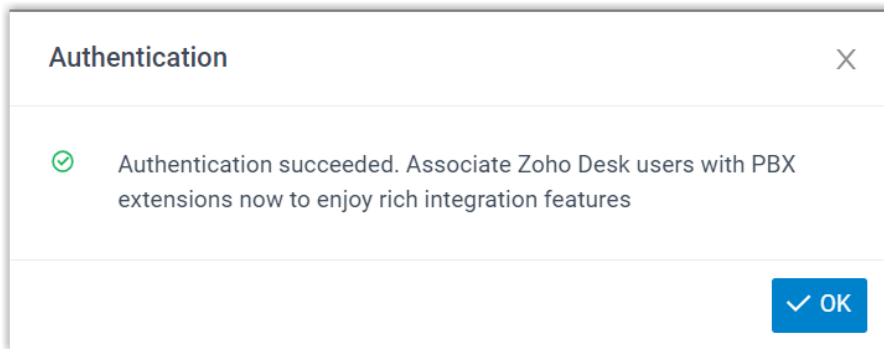
6. Click **OK** to confirm.

The **Status** field displays **Connected**, indicating that Yeastar P-Series Cloud Edition is connected to Zoho Desk successfully.
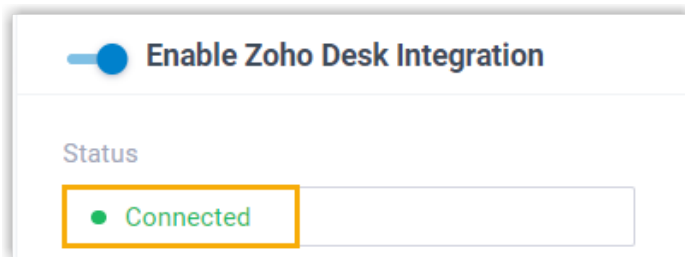
Step 4. Associate Zoho Desk users with PBX extensions

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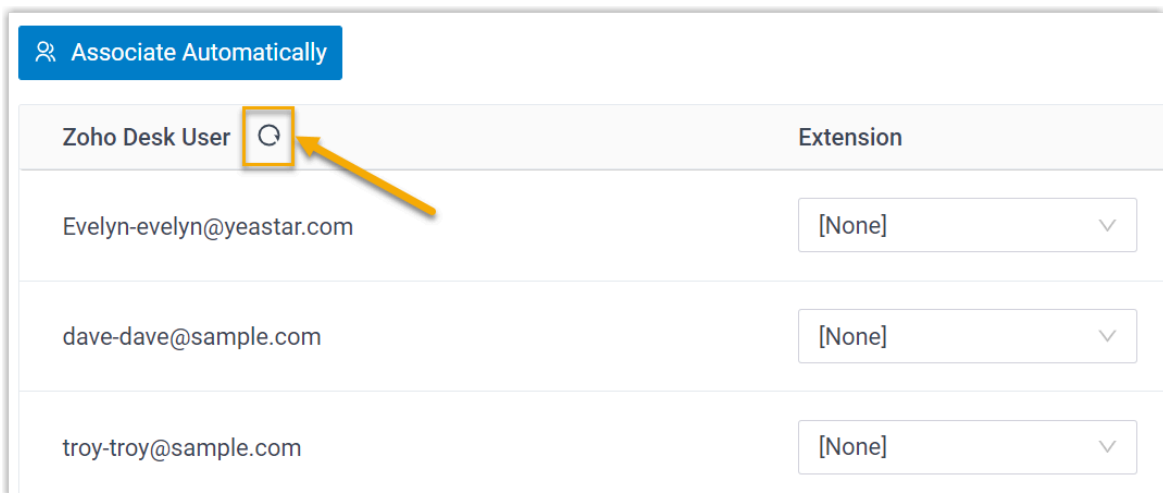
2. Associate Zoho Desk users with PBX extensions.

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.
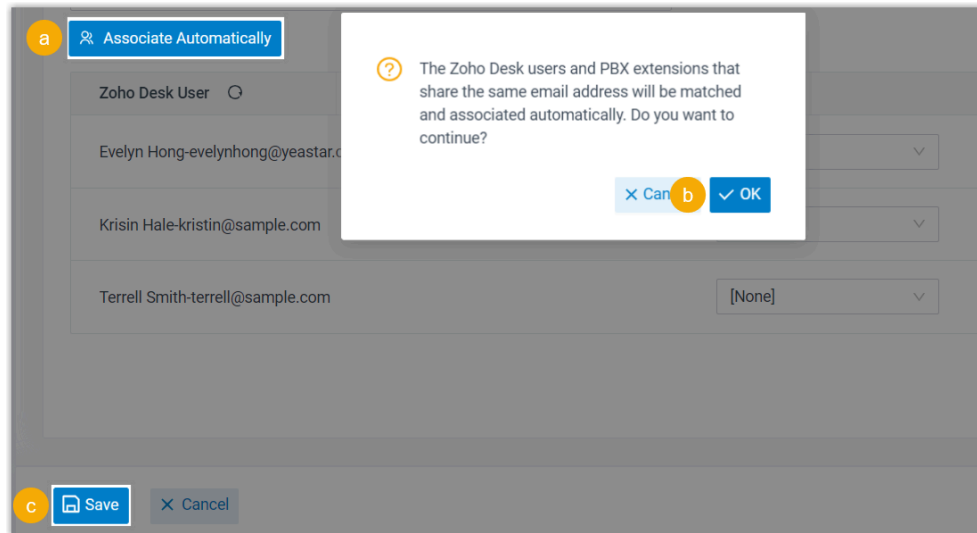
a. Click **Associate Automatically**.

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

c. 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.
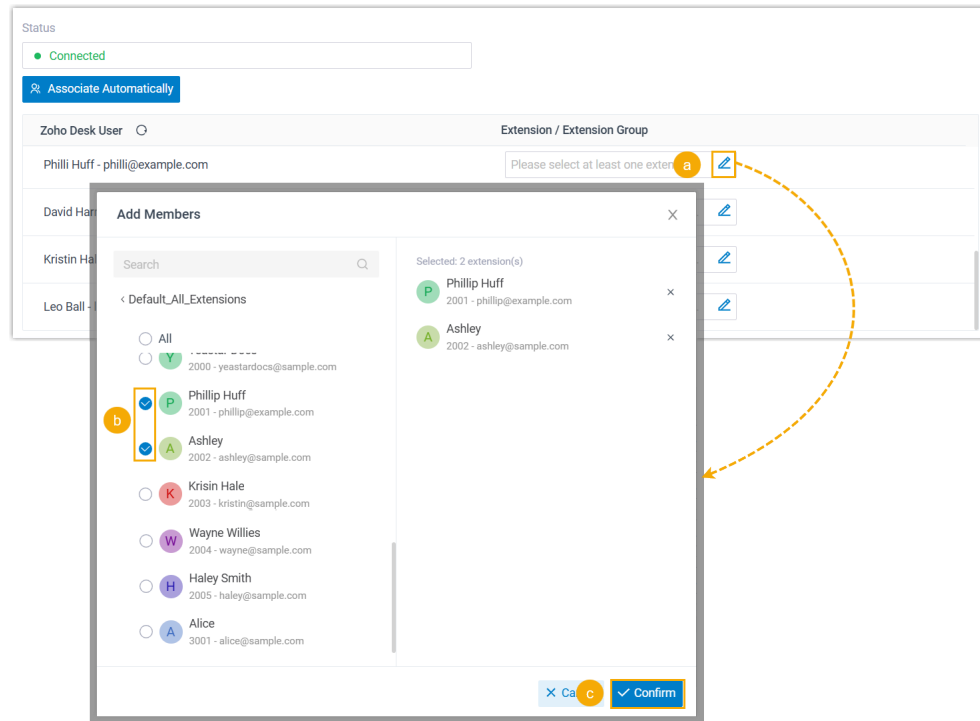
a. In the **Extension / Extension Group** field beside the Zoho user,

click ✎.

b. In the pop-up window, select the desired user's extension(s).

c. Click **Confirm**.

d. Click **Save**.

Result

- The integration of Yeastar P-Series Cloud Edition 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 Contact or Account Creation for Zoho Desk
- Set up Automatic Ticket Creation for Zoho Desk
- Set up Call Popup
- Use Zoho Desk Integration

Set up Contact Synchronization from Zoho Desk

After integrating Yeastar P-Series Cloud Edition 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 Cloud Edition with Zoho Desk](#).

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the Zoho Desk integration page, turn on **Synchronize Contacts Automatically**.
3. In the **Synchronize Contacts From** drop-down list, select the type(s) of contacts to be synchronized from Zoho Desk:
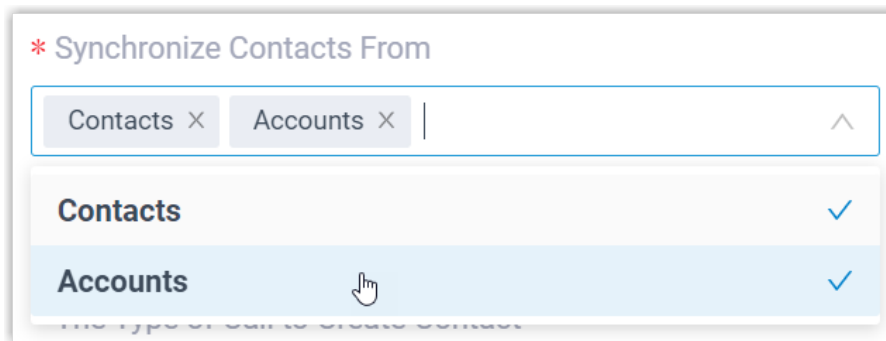
   - **Contacts**: The individuals for whom Zoho Desk users provide support, which are stored in the Zoho Desk **Customers > Contact** module.
   - **Accounts**: The companies or organizations for which Zoho Desk users provide support, which are stored in the Zoho Desk **Customers > Account** module.
4. 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.

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

☑ Always Query Helpdesk

When enabled, PBX will query Helpdesk in real time for contact information and support real-time dial search for Helpdesk contacts in the Linkus client.
When disabled, Helpdesk will only be queried if no matching information is found in the PBX company contacts, and the real-time dial search for Helpdesk contacts in the Linkus client will also be disabled.
Note: Enabling "Always Query" will increase API credit consumption. Please monitor your quota. For details about Helpdesk platform API quotas, refer to the official documentation.

- If enabled, PBX will query Helpdesk in real time for contact information, and support real-time dial search for Helpdesk contacts in the Linkus clients of the associated extension users.
- If disabled, PBX will only query Helpdesk 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 Helpdesk .

	Phonebook Name	Total Contacts	Operations
☐	All Company Contacts_Phonebook	4	✏️ 🗑️
☐	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 Cloud Edition automatically.

> **Note:**
> This is a one-way sync from Zoho Desk to Yeastar P-Series Cloud Edition, 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.
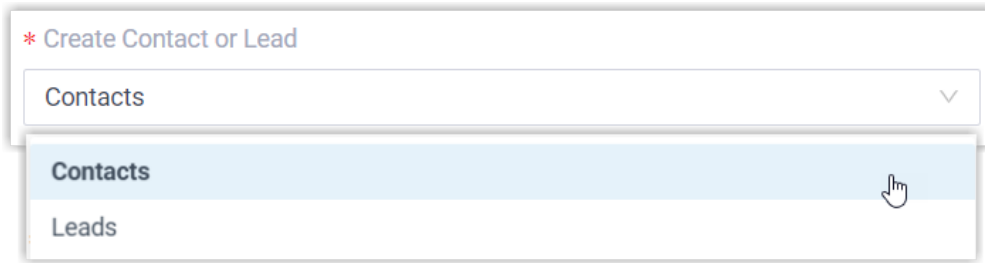
Set up Contact or Account Creation for Zoho Desk

After integrating Yeastar P-Series Cloud Edition with Zoho Desk, you can enable automatic or manual 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 Cloud Edition with Zoho Desk.

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the Zoho Desk 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.
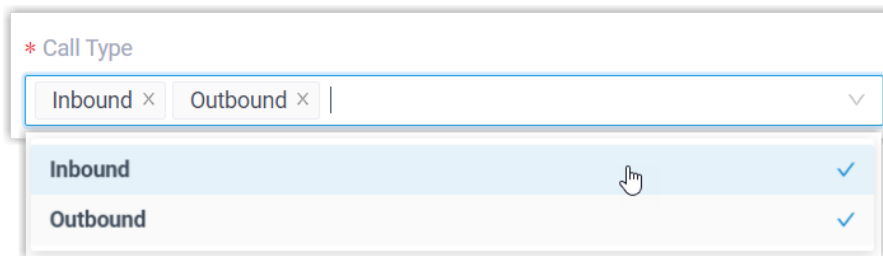
- **Contacts**: Save the unknown number as a Contact.
- **Leads**: Save the unknown number as a Lead.

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 Helpdesk 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 Helpdesk.

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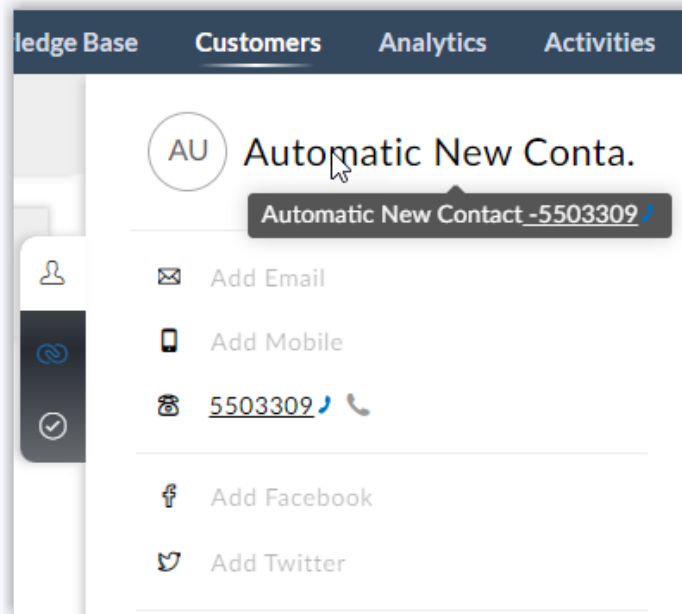
5. Click **Save**.

Result

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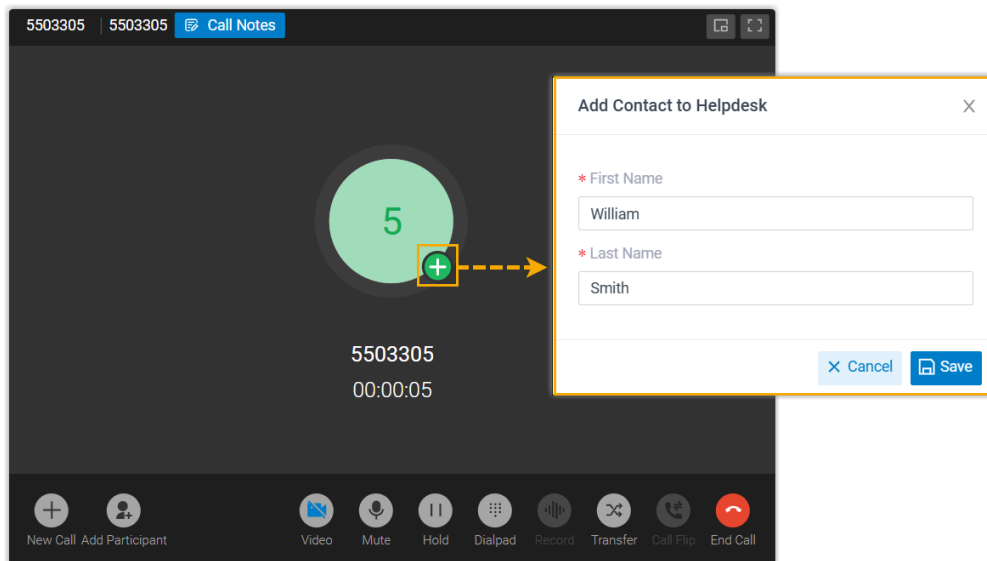

Note:

> 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 manual creation is configured, the associated extension users can manually add an unknown number as a new contact or lead on the Helpdesk.

Note:

> ✏️ 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 Cloud Edition.

Set up Automatic Ticket Creation for Zoho Desk

After integrating Yeastar P-Series Cloud Edition 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 Cloud Edition with Zoho Desk](#).

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the Zoho Desk integration page, turn on **Create New Ticket Automatically**.
3. Set up the time point and call type(s) of automatic ticket creation.

When to Create New Ticket	Description
Before the Call	A ticket will be created in Zoho Desk when the Zoho Desk user receives an inbound call from, or places an outbound call to a Zoho Desk contact. > ✏️ **Note:** > Due to the limitation of Zoho Desk, after creating a new ticket before the call, the contact details in the call popup may not immediately display the newly created ticket. If the ticket does not appear, please wait a moment and refresh the webpage again. 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.

When to Create New Ticket	Description
	• **Inbound**: Inbound calls. • **Outbound**: Outbound calls.
After the Call	A ticket will be created in Zoho Desk when the user ends the call with a Zoho Desk contact. 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. • **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.

4. Configure the following ticket information according to your needs.

> * Subject
>
> {{.Communication_Type}} {{.Call_Status}} - from {{.Call_Fror
>
> Description
>
> {{.Communication_Type}} {{.Call_Status}} - from {{.Call_From}} to {{.Call_To}}
>
> ⓘThe supported variables include {{.Time}}, {{.Call_Log_Status}}, {{.Call_From}}, {{.Call_To}}, and {{.Talk_Duration}}, among others. For a complete list, please refer to the user manual.

- **Subject**: The subject of the ticket.
- **Description**: The description of the ticket.

> 📝 **Note:**
> The contents can be composed of variables. For the supported variables, see [XML Descriptions for Integration Template - New Ticket Creation Scenario Variables](#).
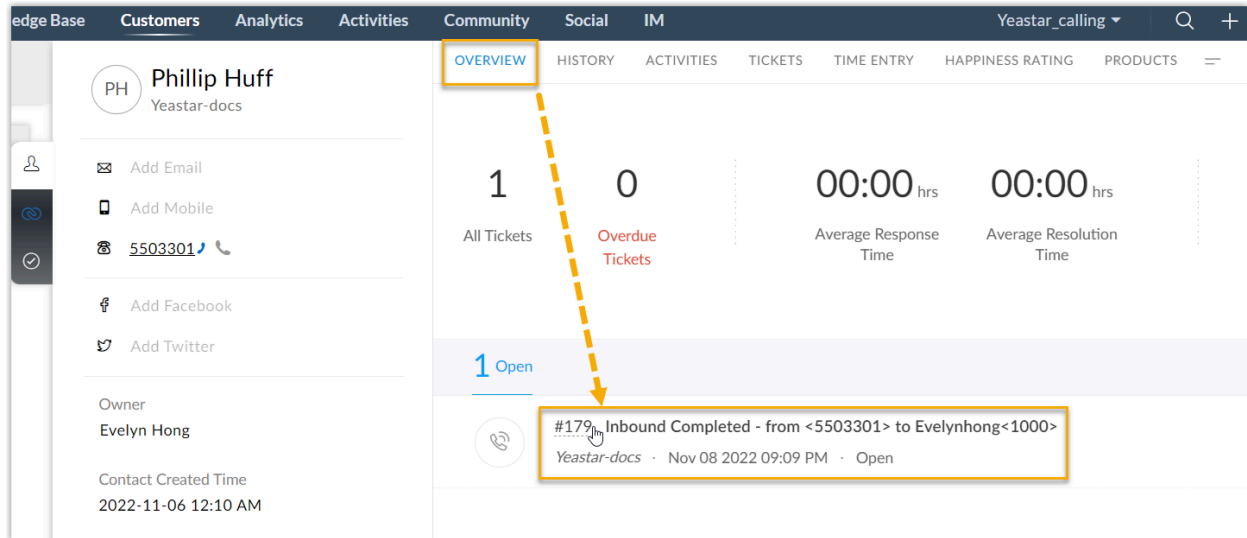
5. Click **Save**.

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.


Set up Call Popup

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

You have integrated Yeastar P-Series Cloud Edition with Zoho Desk.

Procedure

1. Log in to PBX web portal, go to **Extension and Trunk > Extension**.

2. Click ✎ to edit the extension associated with a Helpdesk 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 Helpdesk**.

4. In the **Popup Method** section, decide the method of call popup.
   • If you want the system to automatically open the Helpdesk contact details page, do as follows:
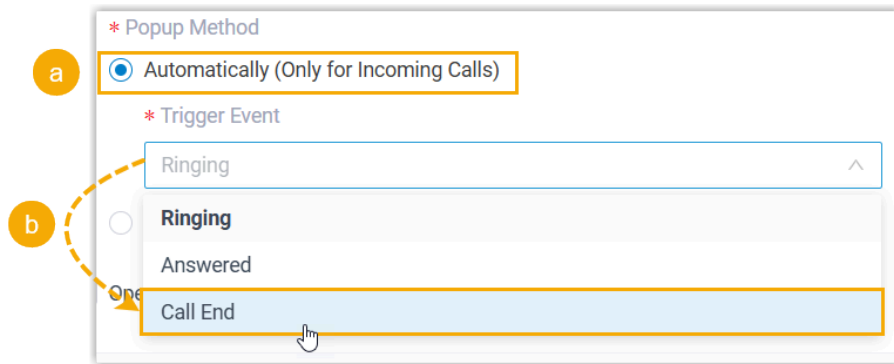
a. Select **Automatically (Only for Incoming Calls)**.

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 Helpdesk contact.
- **Answered**: A call popup will be triggered when a user answers an inbound call from a Helpdesk contact.
- **Call End**: A call popup will be triggered when a user finishes a call with a Helpdesk 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 Zoho Desk contact, a new browser tab will be launched to show the contact's information from the Zoho Desk.
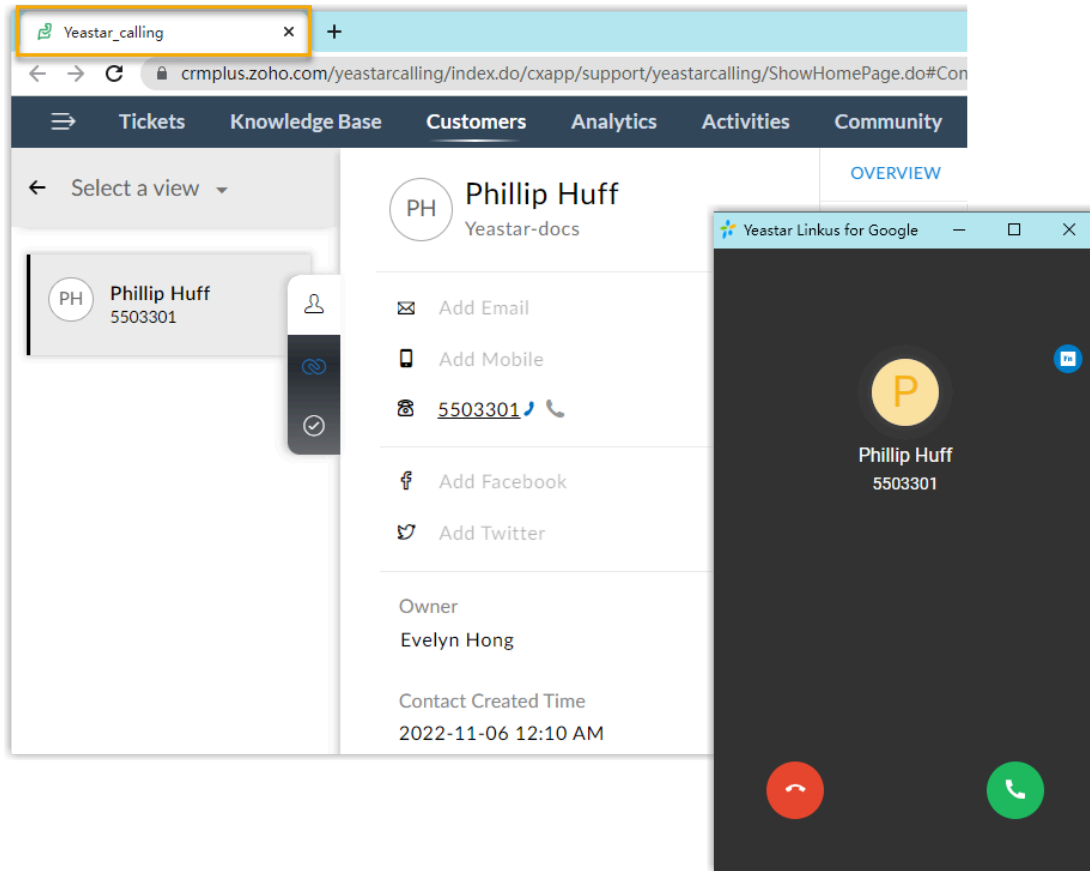
- If manual call popup is configured, the associated extension users can click the `CRM` label on the call window to manually open the contact's details page during a call with the CRM contact.
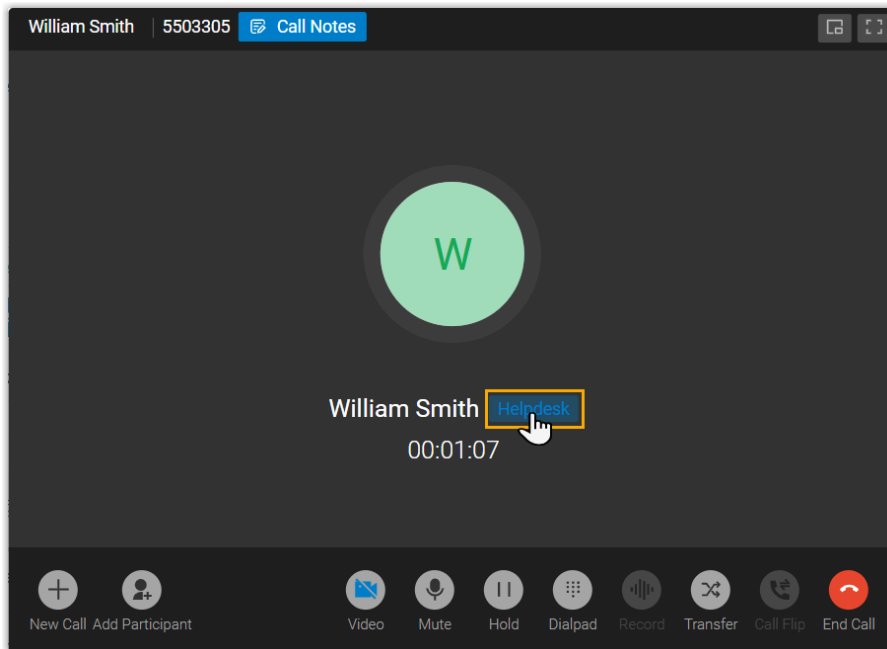
> **Note:**
> The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**.
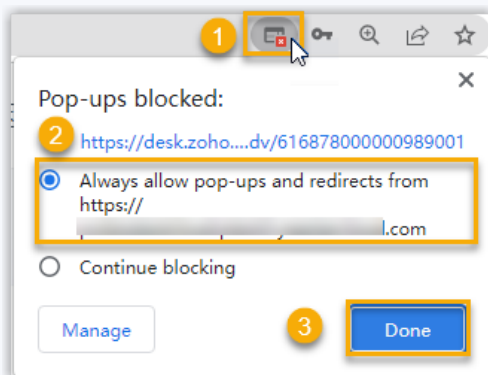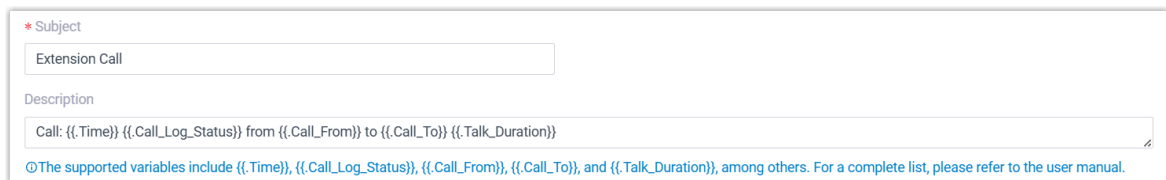

Set up Call Journal to Zoho Desk

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

Prerequisites

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

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the Zoho Desk integration page, turn on **Call Journal**.
3. Configure the following call log information according to your needs.

   - **Subject**: The subject of the call log.
   - **Description**: The description of the call log.

   > ✎ **Note:**
   > The contents can be composed of variables. For the supported variables, see [XML Descriptions for Integration Template - Call Journal Scenario Variables](#).

4. **Optional:** Select the checkbox of **Disable Display Missed Call Records in Unanswered Agents** as needed.

   If enabled, for queue and ring group calls, the PBX will only synchronize the call logs to the Zoho Desk of the agent who answers the call, while missed call logs for the same call are not synchronized to the Zoho Desk of agents who did not answer.
5. Click **Save**.

Result

When the associated users ends a call with a Zoho Desk contact, the PBX will automatically synchronize the call log to Zoho Desk with the pre-defined subject and description.

Use Zoho Desk Integration

This topic shows the usage of the key features that can be achieved after integrating Yeastar P-Series Cloud Edition with Zoho Desk.
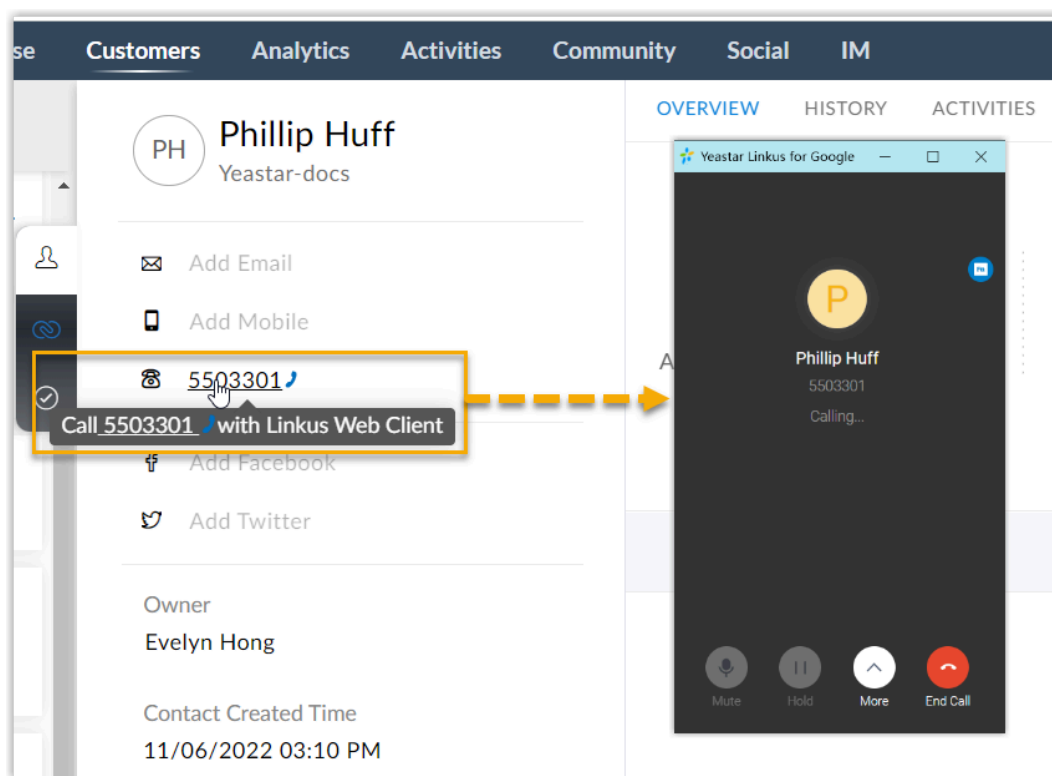
Click to Call

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 Zoho Desk users receive / answer an inbound call from a Zoho Desk contact, or finish a call with a Zoho Desk contact, a new browser tab will automatically be launched to show the Zoho Desk contact's information. Additionally, users can manually open the contact's information from the call window during the call.
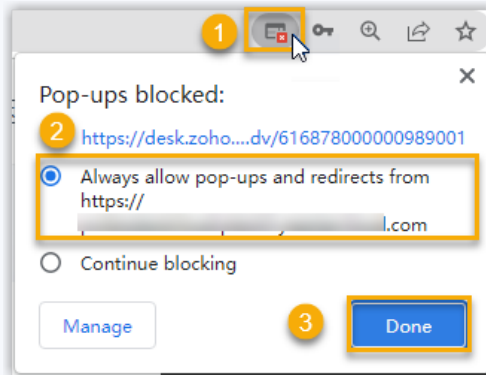
> **Note:**
> For more information about the settings, see [Set up Call Popup](#).
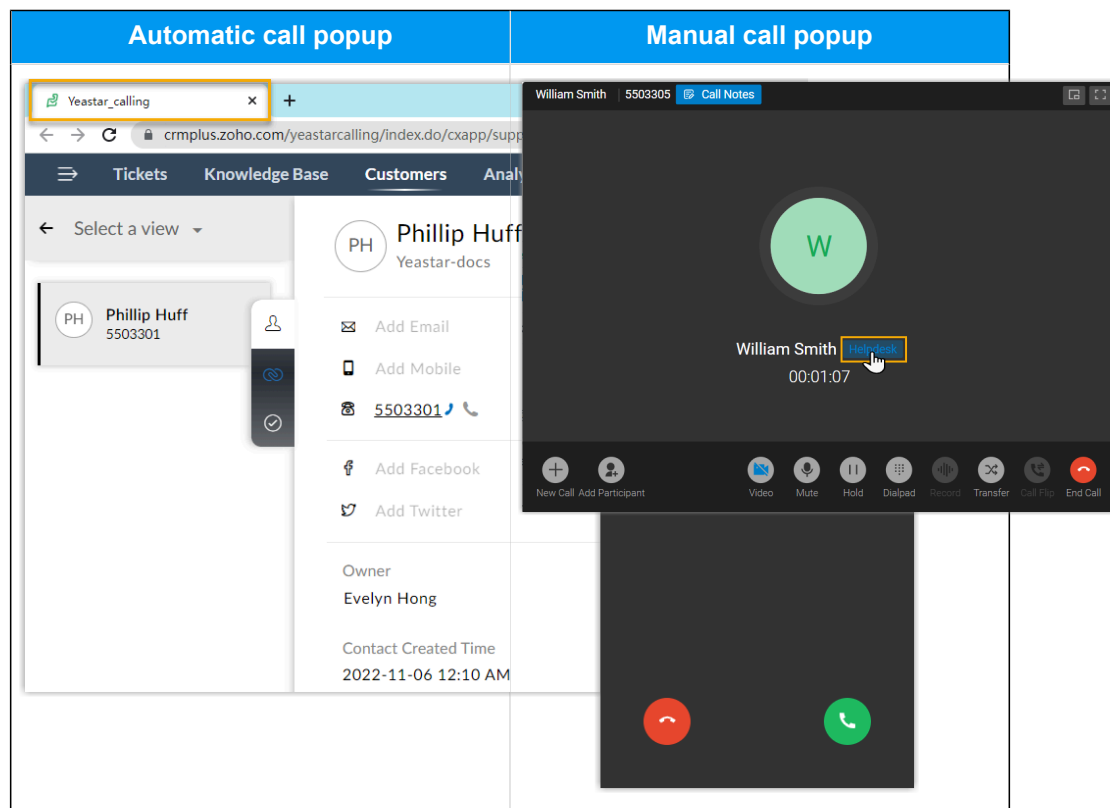
Note:

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

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**.
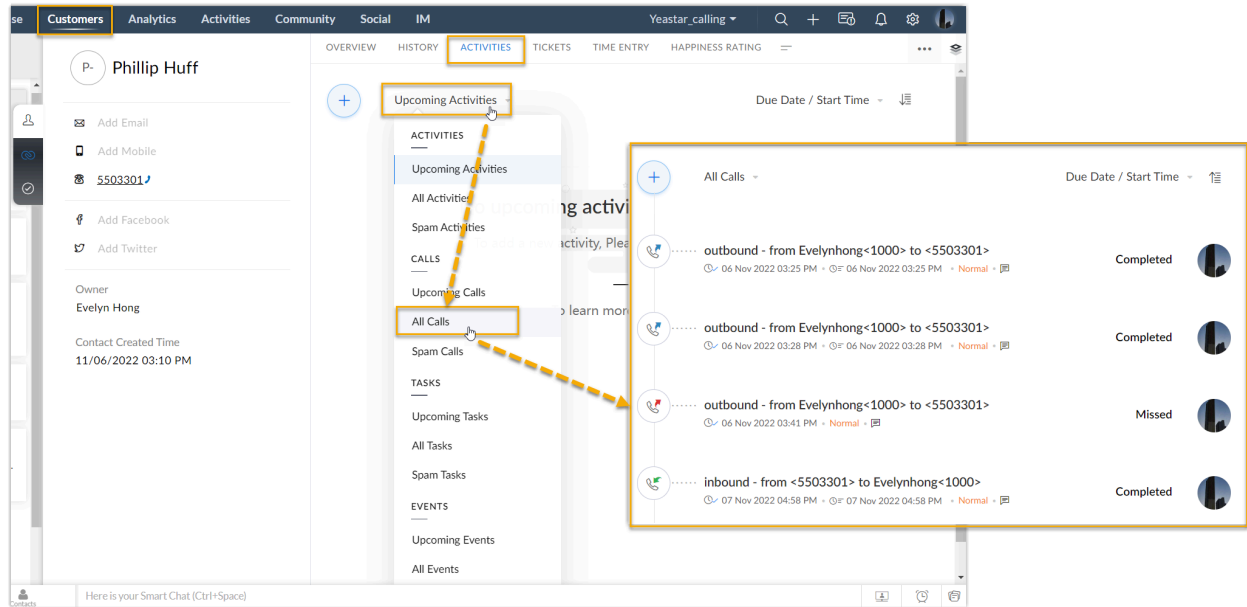
Contact Synchronization

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.
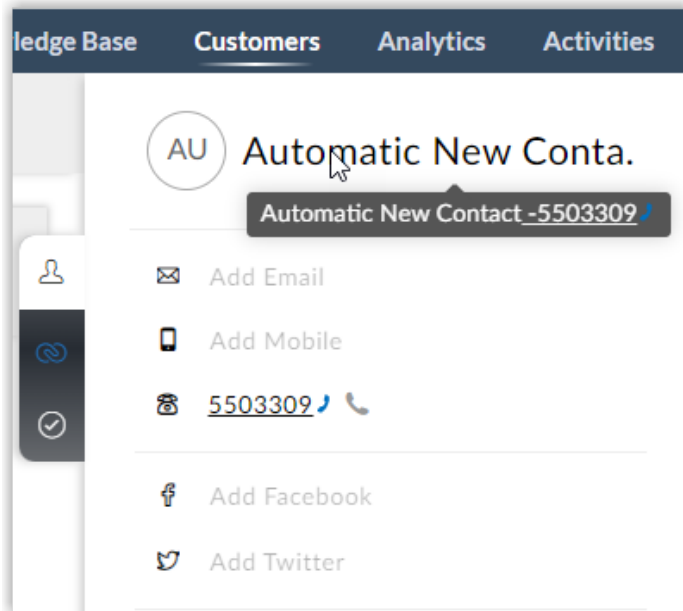
For more information, see Set up Contact Synchronization from Zoho Desk.
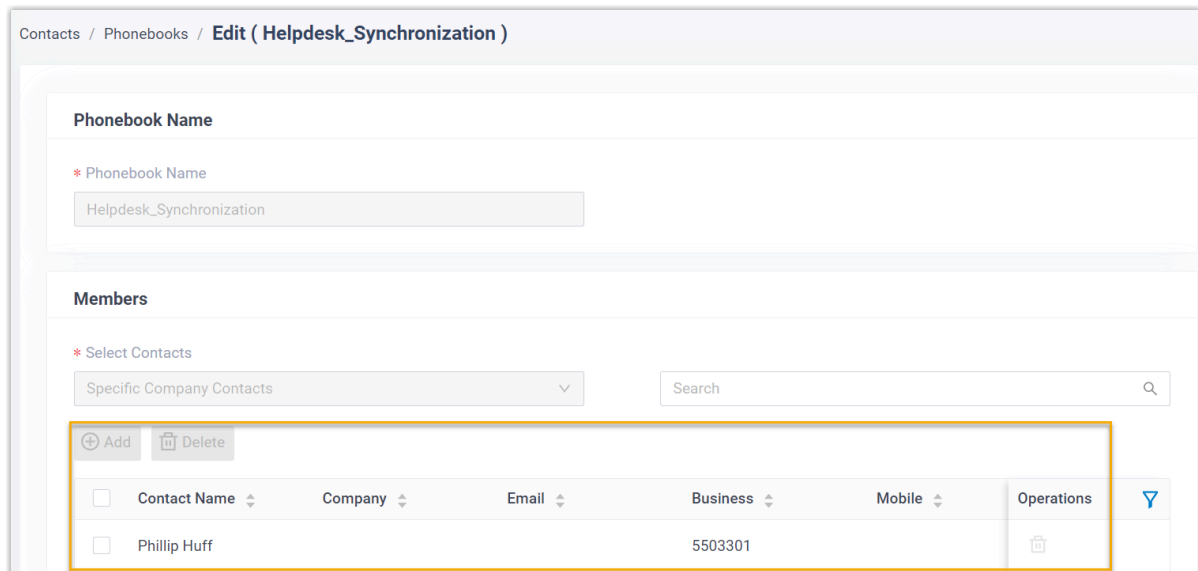
Contact or Account Creation

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

For more information, see [Set up 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](#).

Disable Zoho Desk Integration

You can disable the Zoho Desk integration on Yeastar P-Series Cloud Edition 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.
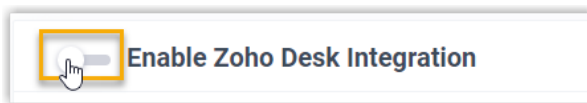

3. Click **Save**.

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. At the top-right corner, click **Cancel Integration**.
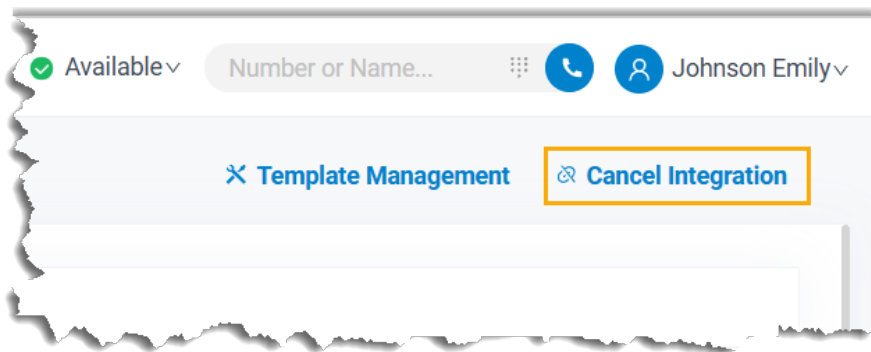
3. In the pop-up window, click **OK**.

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.