




Zoho CRM Integration Guide

Yeastar P-Series Appliance Edition

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Contents

Zoho CRM Integration Overview.....	1
Zoho CRM Integration.....	3
Integrate Yeastar P-Series PBX System with Zoho CRM.....	3
Set up Contact Synchronization with Zoho CRM.....	9
Set up Automatic Lead or Contact Creation for Zoho CRM.....	11
Use Zoho CRM Integration.....	13
Disable Zoho CRM Integration.....	16
Disconnect Zoho CRM Integration.....	17

Zoho CRM Integration Overview

Zoho CRM is a full-featured customer relationship management (CRM) system. The integration of Yeastar P-Series PBX System with Zoho CRM can bring great advantages of the company that will help boost sales and improve business relationships. This topic gives an overview of the integration and describes terminologies of Zoho CRM to help you better understand 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
 - Firmware: Version 37.4.0.17 or later
 - Plan: Yeastar P-Series Enterprise Plan (EP) or Ultimate Plan (UP)

Key features

The Zoho CRM integration provides the following key features:

Click to Call

Coordinated with the ['Yeastar Linkus for Google'](#) Chrome extension, users can launch calls by a single click on the phone numbers from Zoho CRM via Yeastar Linkus Web Client or Desktop Client.

Call Popup

Auto bring up the contact's profile on the web browser when the user receives an inbound call from CRM contacts. This allows users to quickly access to the previous interactions and customer demographics of the caller and get more prepared to answer the call.

Call Journal

All the call activities get logged automatically to Zoho CRM when the user ends calls with CRM contacts, which helps users track conversations easier than ever.

Contact Synchronization

Synchronize your CRM contacts to an associated PBX phonebook when receiving inbound calls from Zoho CRM contacts. After that, the caller name is automatically shown on the Linkus clients or IP phone when receiving the call.

Automatic Contact Creation

A new contact or lead will automatically be created in CRM for unknown inbound calls or outbound calls.

Terminologies

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 to each staff. The staffs can register the extension on a phone or log in to the 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 to 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 with Zoho CRM](#)

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

[Use Zoho CRM Integration](#)

[Disable Zoho CRM Integration](#)

[Disconnect Zoho CRM Integration](#)

Zoho CRM Integration

Integrate Yeastar P-Series PBX System with Zoho CRM

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

Prerequisites

- You need to [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 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 management portal, go to Integrations > CRM.
2. Beside Zoho CRM, click Integration.
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.

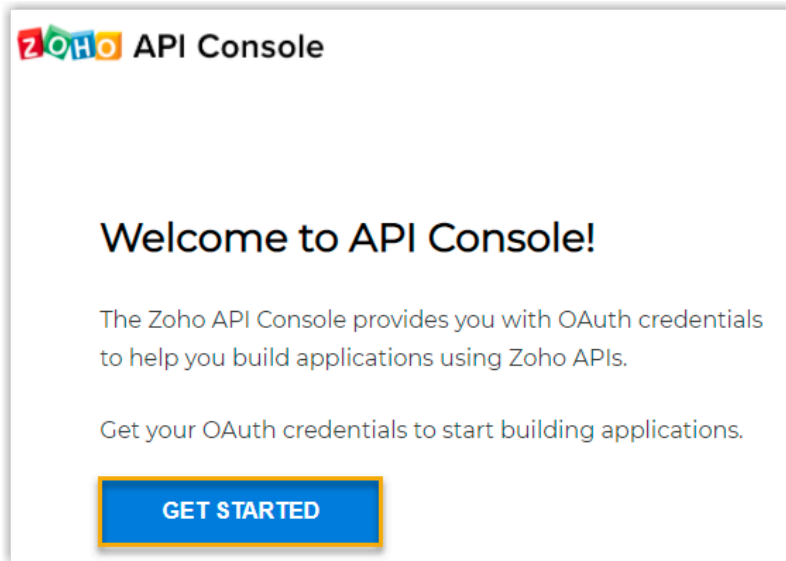
A redirect URI according to the selected Homepage URL is automatically generated in the Authorized Redirect URI field.

Homepage URL https://docs.ras.yeastar.com	Authorized Redirect URI https://docs.ras.yeastar.com/integration/callback/api/crm/zoho/
---	---

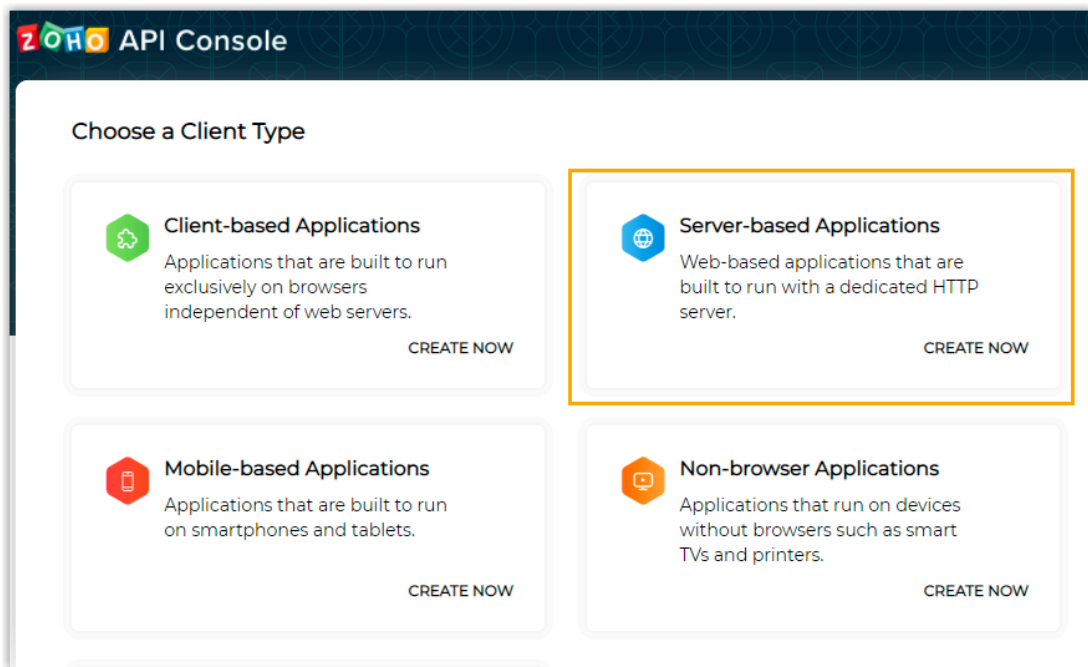
4. Take note of the Homepage URL and the redirect URI as you will use them later on Zoho CRM.

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

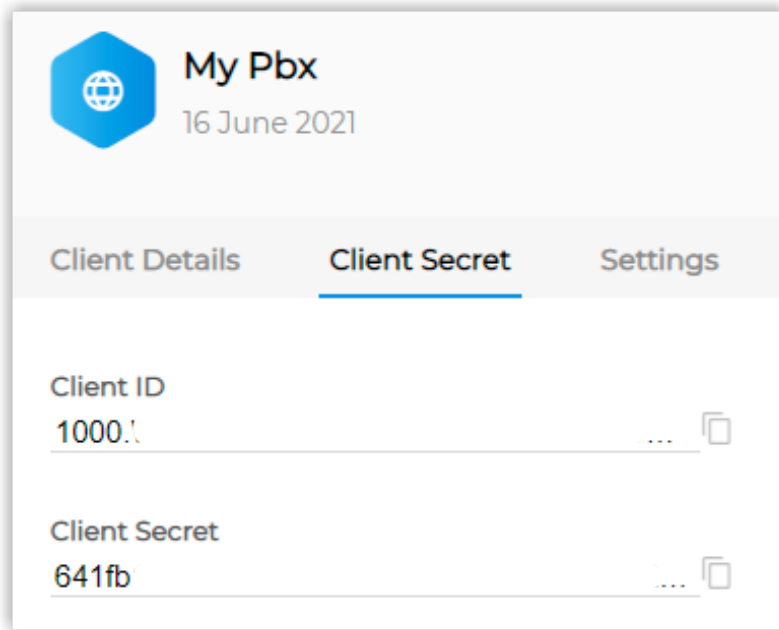
Homepage URL
<https://docs.ras.yeastar.com>

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.




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. Go back to the CRM integration page on the PBX management portal.
2. In Authorization section, fill in the following API authorization information.

The screenshot shows an 'Authorization' form with four input fields arranged in a 2x2 grid. The top-left field is labeled '* Account Server Address' and contains 'https://accounts.zoho.com'. The top-right field is labeled '* Zoho CRM Address' and contains 'https://crm.zoho.com'. The bottom-left field is labeled '* Client ID' and contains a series of dots. The bottom-right field is labeled '* Client Secret' and also contains a series of dots. Each field has a copy icon to its right.

- 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 it. For example, if your CRM account is based in Europe, you need change the value to `https://accounts.zoho.eu`.

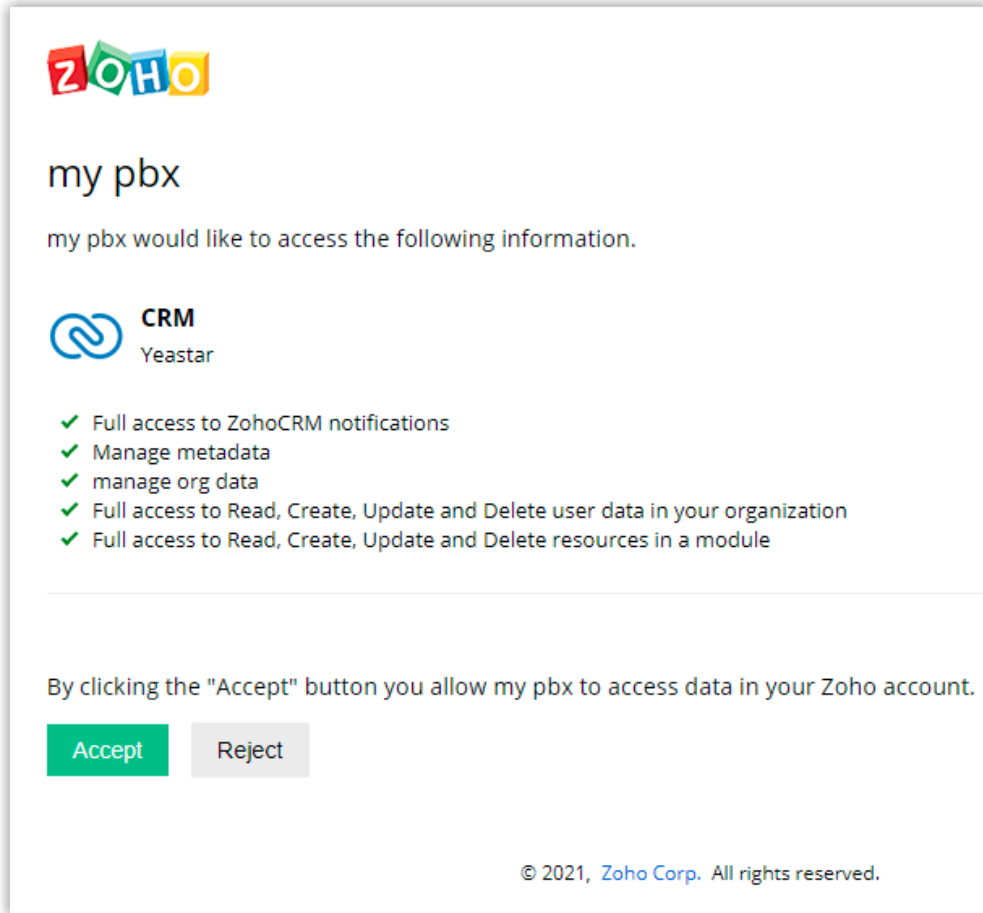
- Zoho CRM Address: Enter the Zoho CRM URL.

 **Note:**
 The default URL <https://crm.zoho.com> applies in many cases, but you may need to change it. For example, if your CRM account is based in Europe, you need change the value to `https://crm.zoho.eu`.

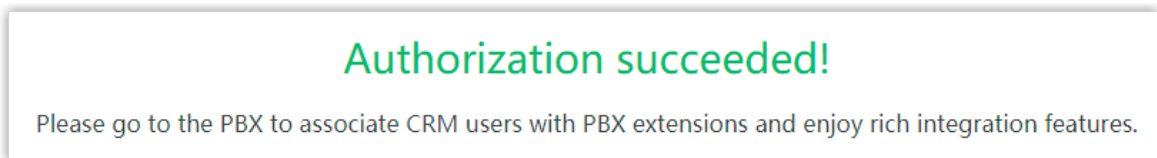
- Client ID: Paste the Zoho API Client ID.

- Client Secret: Paste the Zoho API Client secret.
3. Click Save.

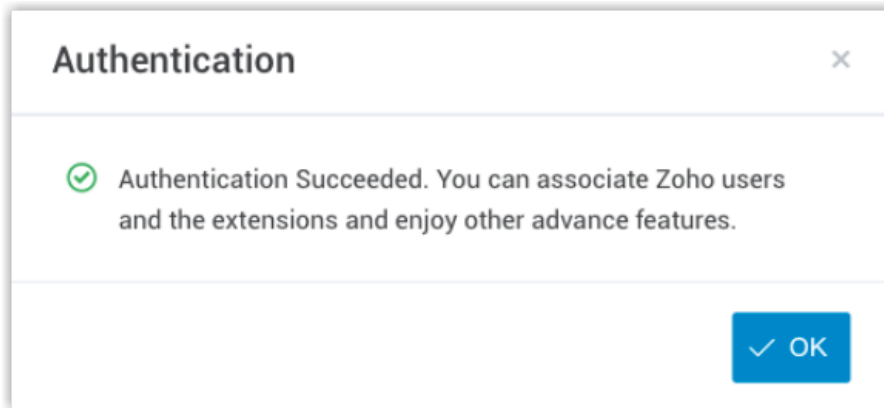
A new browser page will be launched to request for Zoho CRM data access permission.



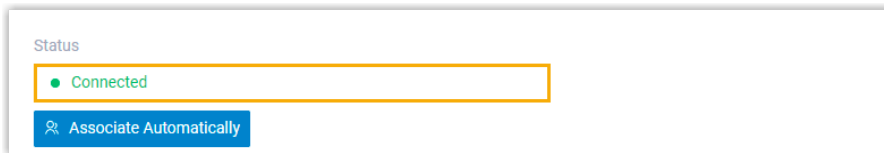
4. Click Accept to allow the PBX to access data in your Zoho account.
If the authorization succeeds, the web page will display "Authorization succeeded!".



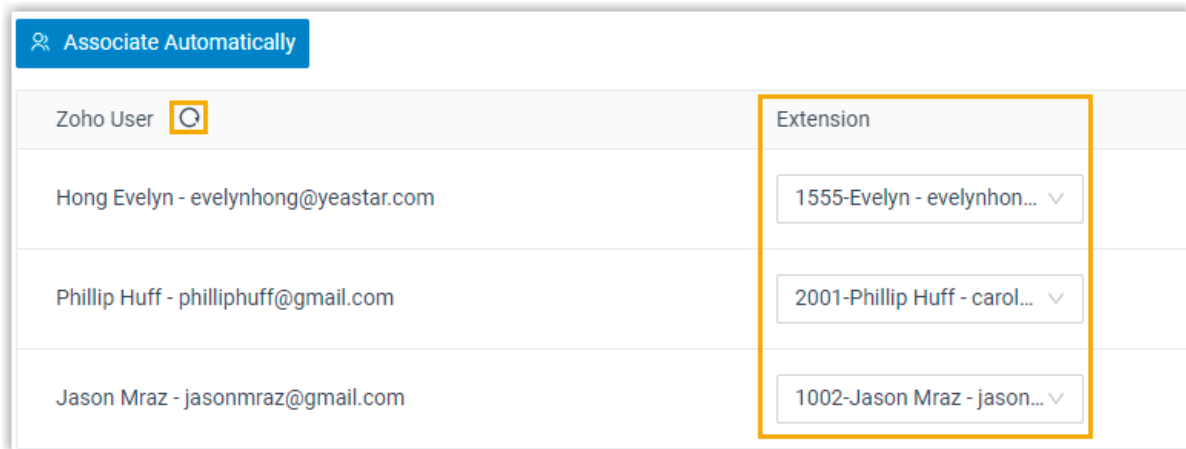
5. Go back to the PBX configuration page, a pop-up window also displays the authorization result. Click OK to confirm.




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 synchronize Zoho CRM users.
2. Associate the Zoho users with PBX extensions.

Associate automatically

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


The Zoho users and PBX extensions that share the same email address will be matched and associated with each other automatically.

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 User account and PBX extension.

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

Note:

If users in the organization have been changed, click  to refresh the Zoho user list, and re-assign extensions.

Result

Once integration is enabled by the Zoho administrator, the integration is activated for all users.

What to do next

- [Set up Contact Synchronization with Zoho CRM](#)
- [Set up Automatic Lead or Contact Creation for Zoho CRM](#)
- [Use Zoho CRM Integration](#)

Set up Contact Synchronization with Zoho CRM

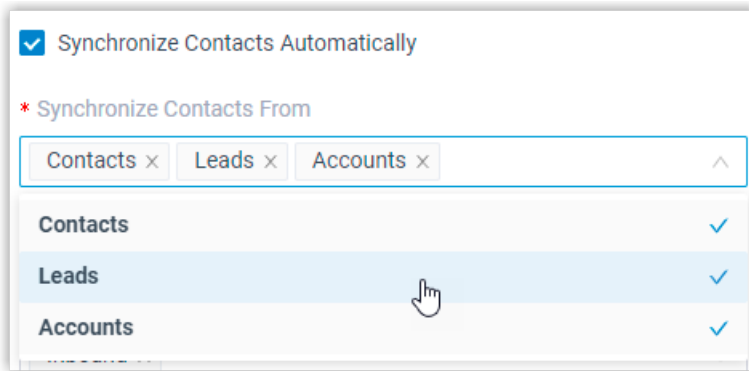
After the integration with Zoho CRM, you can enable a one-way contact synchronization on PBX to sync the Zoho CRM Contacts to a PBX phonebook.

Prerequisites

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

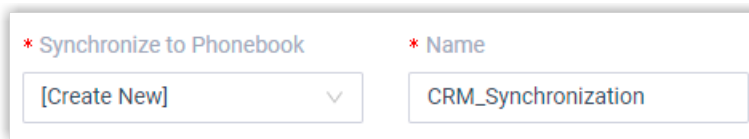
Procedure

1. Log in to PBX management 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: [Contacts](#), [Leads](#), [Accounts](#).



- In the Synchronize to Phonebook drop-down list, select an empty phonebook or create a new phonebook.

Note:
The Contacts can only be synchronized to an empty phonebook.



- Click Save.

Result

- The associated phonebook comes with a label of "CRM", and there are no synchronized contacts in the phonebook yet.

This is a one-way sync to Yeastar P-Series PBX System, so you cannot add, edit, or delete the synchronized contact information on the PBX.

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

- Only when users receive an inbound call from a Zoho CRM contact will the matched contact information be synchronized to the Phonebook in Yeastar P-Series PBX System automatically.

Note:
If the information of synchronized contacts is updated on Zoho CRM, the change will be automatically synchronized to PBX in 30 minutes.

- After the CRM contact is synchronized to PBX, users can get the caller information on their Linkus Clients or IP phone when receiving the call, and be more prepared to answer the call.

Note:

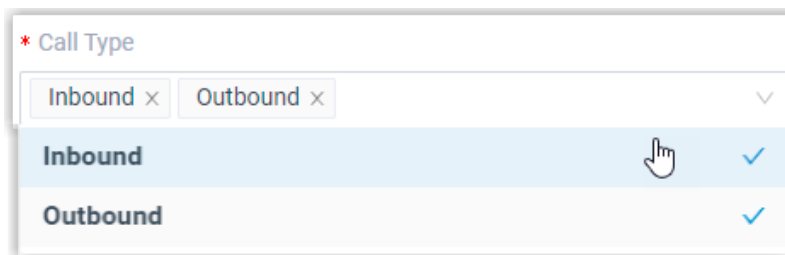
To achieve this feature, you need to enable the phonebook viewing permission for extension users. For more information about the permission configurations, see [Grant Company Contacts Permissions](#).

Set up Automatic Lead or Contact Creation for Zoho CRM

After the integration with Zoho CRM, you can set up automatic lead or contact creation. This feature helps you to build your contact database efficiently and ensures all contact information is captured.

Procedure


1. Log in to PBX management 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.



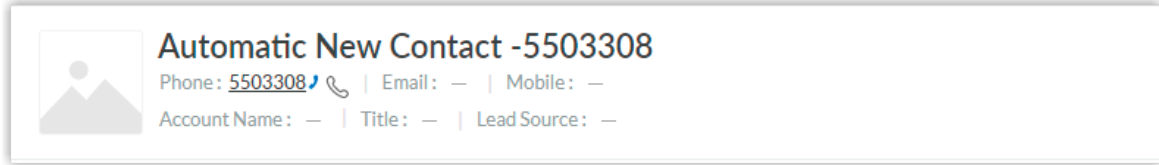
- Inbound: Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
 - Outbound: Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the CRM.
4. In the Create Contact or Lead drop-down list, select the information 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 is 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.



Automatic New Contact -5503308
Phone: [5503308](tel:5503308) | Email: — | Mobile: —
Account Name: — | Title: — | Lead Source: —

- 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.

<input type="checkbox"/>	Contact Name	Mobile	Business	Operations
<input type="checkbox"/>	Automatic New Contact -5503308		5503308	

Use Zoho CRM Integration

The integration with Zoho CRM supports various features for your business dealings, bringing great convenience and efficiency. This topic shows the usage of the key features.

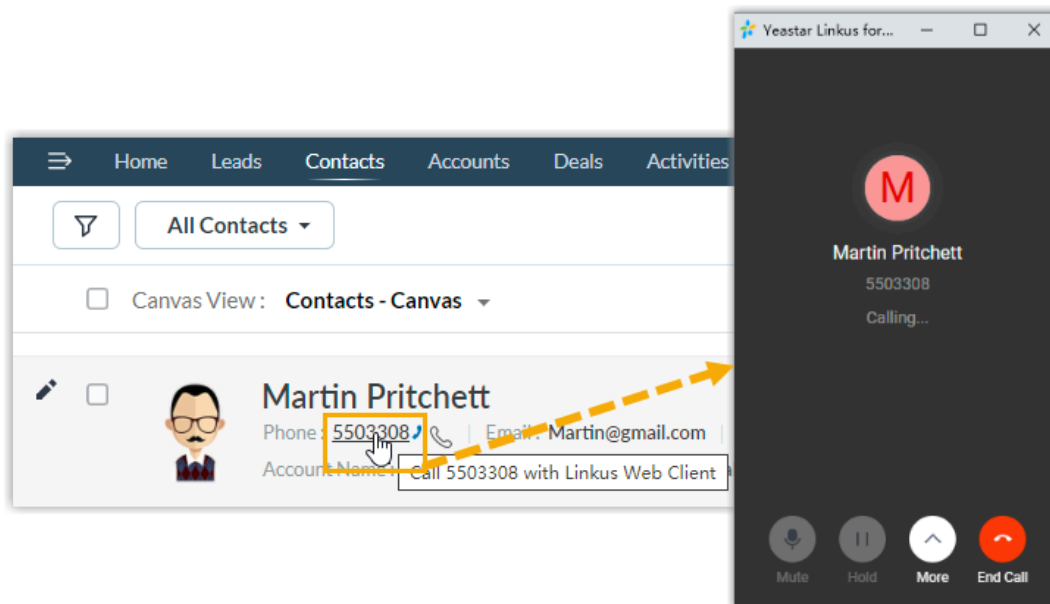
Click to Call

Prerequisites

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

Procedure

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



Call Popup

Prerequisites

Keep the Linkus Web Client logged in.

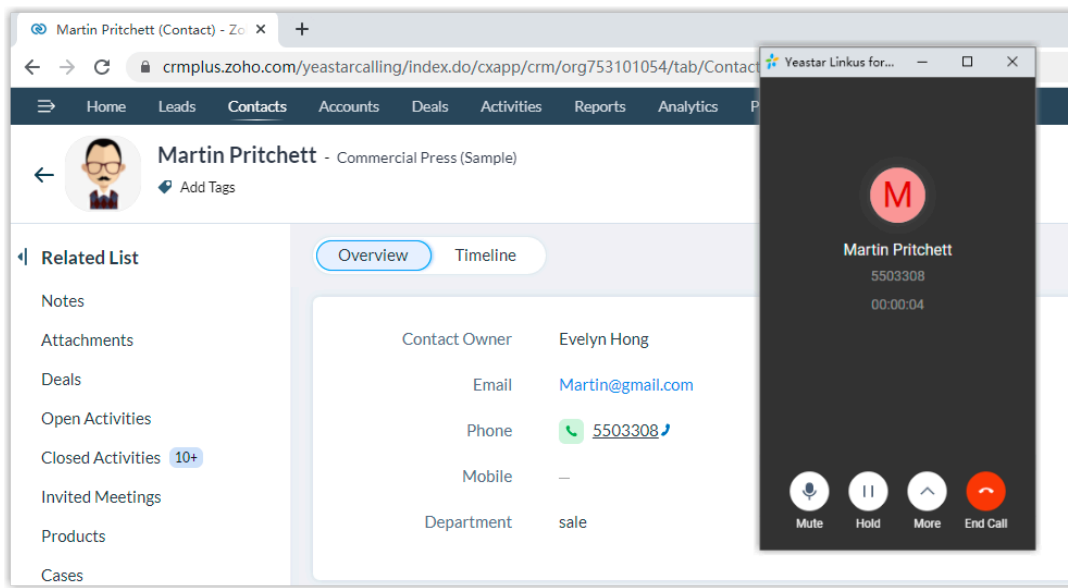
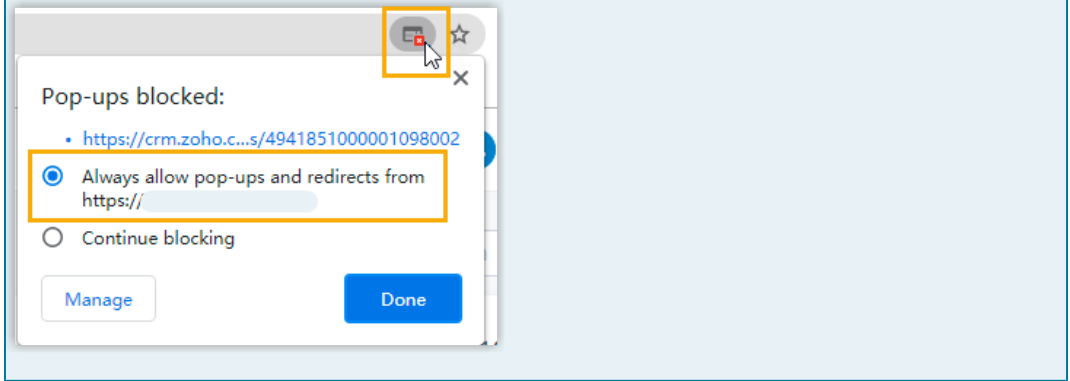
Note:
If you close web browser or Linkus Web Client tab, you can NOT receive calls. To avoid this, you can install Chrome extension '[Yeastar Linkus for Google](#)', which allows you to receive a call popup even when web browser is closed.

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:

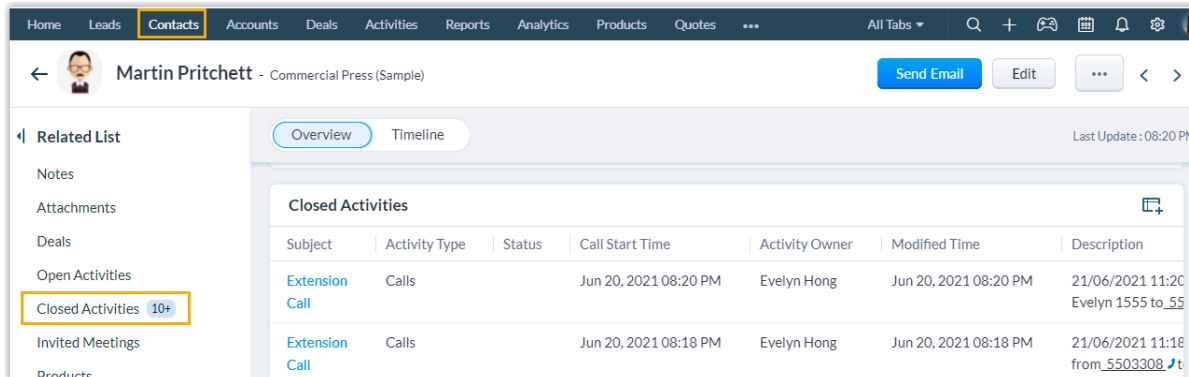
The pop-up window might be blocked by the browser. In this case, you need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click Done.



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 .

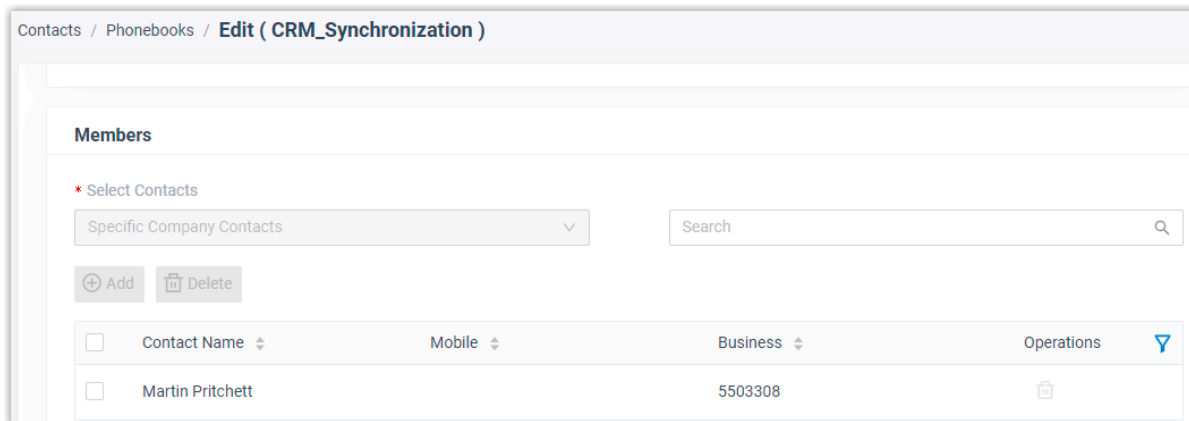


Contact Synchronization

Inbound calls from Zoho contacts trigger a CRM contact lookup to synchronize to a PBX phonebook, and the synchronized contacts are read-only.

After synchronization, the caller name is automatically shown on your phone or Linkus Clients when receiving the call.

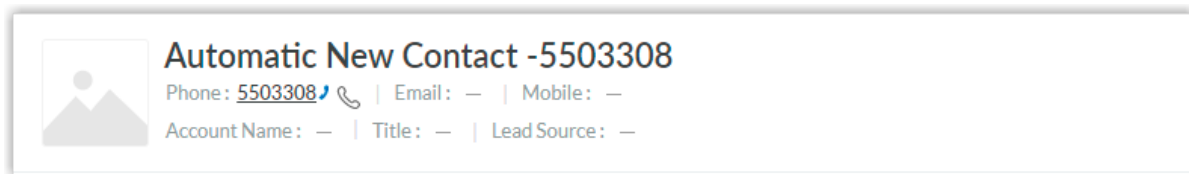
For more information, see [Set up Contact Synchronization with Zoho CRM](#).



Automatic Contact 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](#).

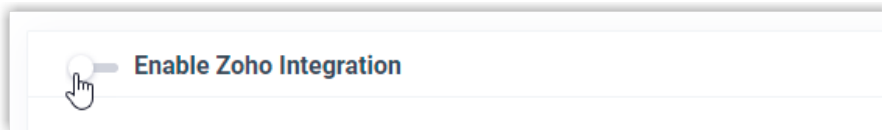


Disable Zoho CRM Integration

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 management portal, go to Integrations > CRM.
2. Turn off the Enable Zoho Integration switch on the top.



3. Click Save.

Result

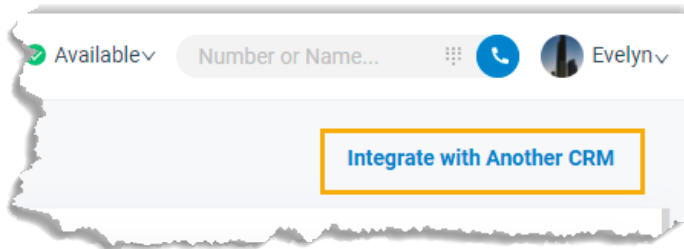
- The Status field displays Disabled.
- The CRM integration configurations are retained and can be used directly the next time it is enabled.

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 management 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.