Zoho Integration

Yeastar Cloud PBX

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Contents

Zoho Integration Guide

About this guide

This guide introduces how to integrate Yeastar Cloud PBX with Zoho Applications and gives brief instructions of how to use the Zoho integrations features.

Audience

This guide is for administrators who need to integrate Yeastar Cloud PBX with Zoho One, Zoho CRM, Zoho Mail, and Zoho Recruit.

Requirements

- **Zoho editions**: Starter, Standard, Professional, and Enterprise.
-

Zoho Integration Introduction

Zoho Integration App is designed to facilitate quick integration between your Yeastar Cloud PBX and multiple Zoho applications.

Supported Zoho applications and features

The Zoho Integration App is applicable to the following Zoho applications:

- **Zoho One**: An all-in-one suite of Zoho applications designed to meet user's every business need.
- **Zoho CRM**: Online CRM customer relationship management system and sales management software.
- **Zoho Mail**: Enterprise cloud mailbox designed for corporate users especially.
- **Zoho Recruit**: Online intelligent recruitment management software for corporate human resources.

The Zoho Integration App enables the following features and benefits in the above Zoho applications:

- **One-for-all Integration**: Integrate multiple Zoho applications at one time in one simple integration process.
- **Click-to-call**: Click on any phone number to make an outbound call right straight from Zoho.
- **Call Pop-ups**: Automatically display the caller information as a screen pop-up upon an inbound call.

- **Call Journals**: All call details will be automatically logged in Zoho to help you keep track of every conversation.

	Zoho One	Zoho CRM	Zoho Mail	Zoho Recruit
One for all Integration	#	#	#	#
Click to Call	#	#	#	#
Call Pop-ups	#	#	#	#
Call Journals	#	#	-	-

Terminologies

- **Zoho super administrator**: The master that can access all the data and manage all the users in Zoho applications, 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 and use the extension to make 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.

Install Zoho Integration App

1. Log in PBX web interface, go to **App Center**.
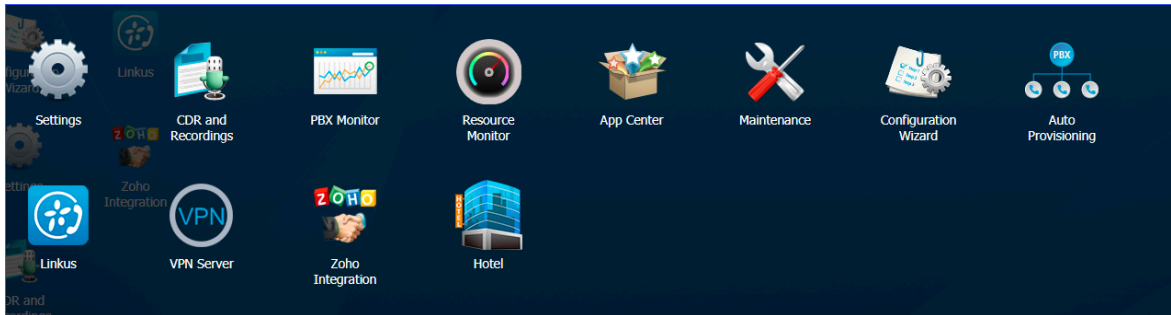2. Find the **Zoho Integration**, click **install**.

Refresh the page after the installation is complete, click the main menu, the Zoho Integration icon appears.

Zoho Integration

Integrate Yeastar Cloud PBX and Zoho Applications

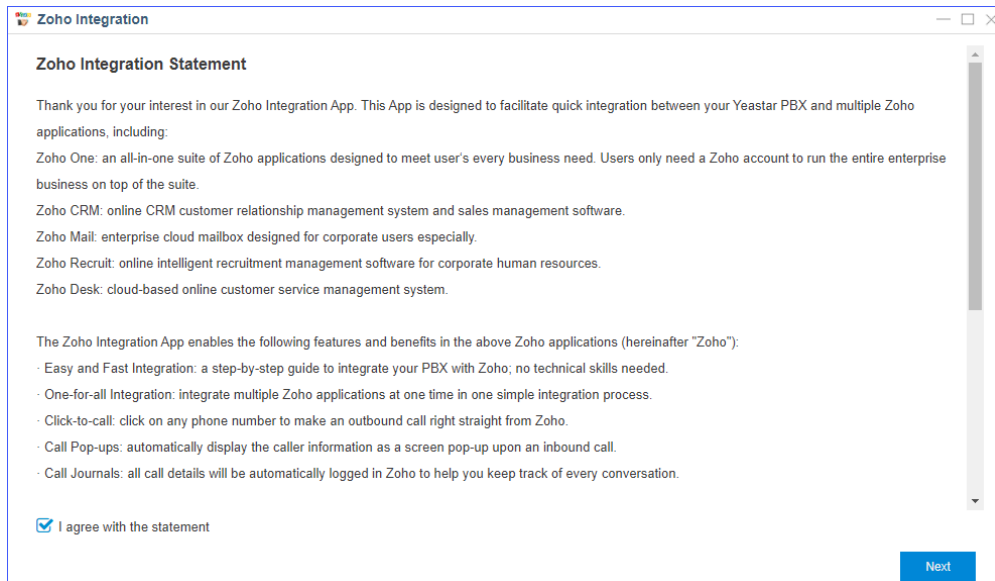This topic introduces how to integrate Yeastar Cloud PBX and Zoho applications.

Log in the PBX web interface, open **Zoho Integration**, follow the steps below to complete integration.

> **Note:**
>
> • Only an super administrator can enable the integration.
> • Once integration enabled by the super administrator, the integration is activated for all users.

Prerequisite steps

1. Agree with integration statement.
2. Read the integration statement, and select the check-box of I agree with the statement.
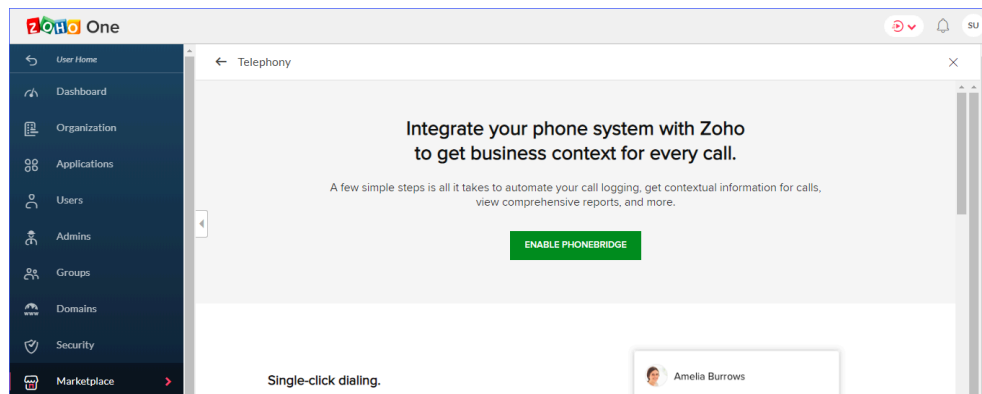3. Click **Next**.

Step 1. Enable Phonebridge on Zoho

The procedures are different on Zoho One and Zoho applications:

- [Enable Phonebridge on Zoho One](#)
- [Enable Phonebridge on Zoho CRM, Zoho Mail or Zoho Recruit](#)

### Enable Phonebridge on Zoho One

1. Log in the Zoho One with super administrator account.
2. Go to **Marketplace > Telephone**.
3. Click **Learn More** button.
4. Click **ENABLE PHONEBRIDGE**.

5. Back to PBX web interface, click **Next** in the **Zoho Integration** page, [get Zoho user consent](#).

Enable Phonebridge on Zoho CRM, Zoho Mail or Zoho Recruit

1. Log in your Zoho application with super administrator account.
2. Go to **Setup > Channels > Telephone**.
3. Click **ENABLE PHONEBRIDGE** button.
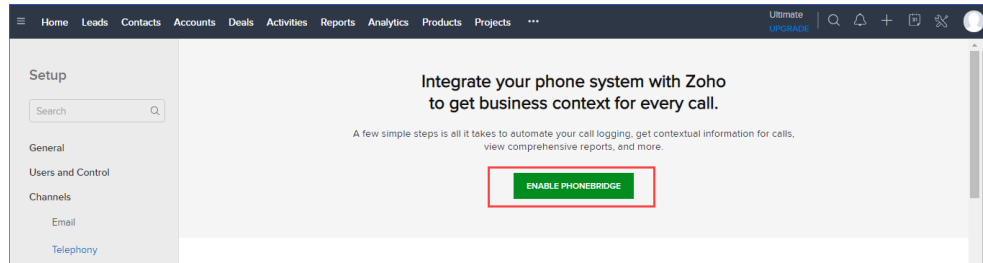
4. Back to PBX web interface, click **Next** in the **Zoho Integration** page, get Zoho user consent.

Step 2. Get Zoho User consent

Note: Do NOT integrate your Zoho with multiple PBXs, or you cannot make calls and receive calls in Zoho.

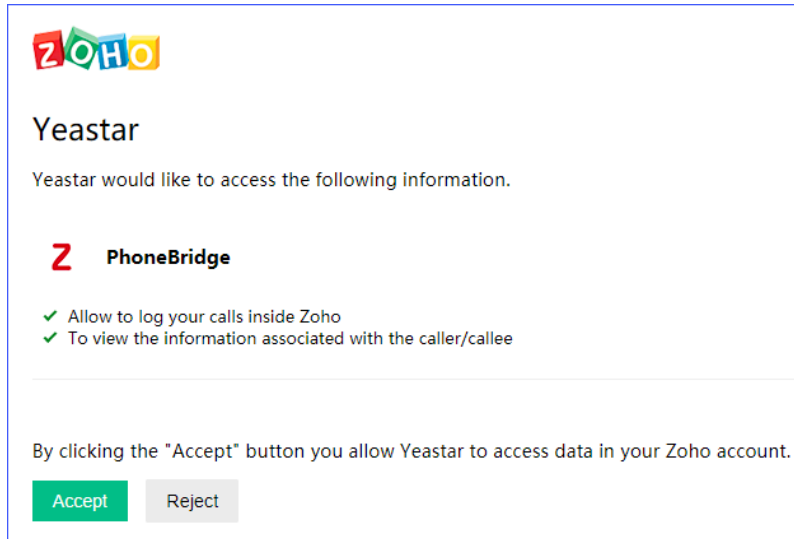1. In the **Zoho Login Address** drop-down list, select your Zoho application address.
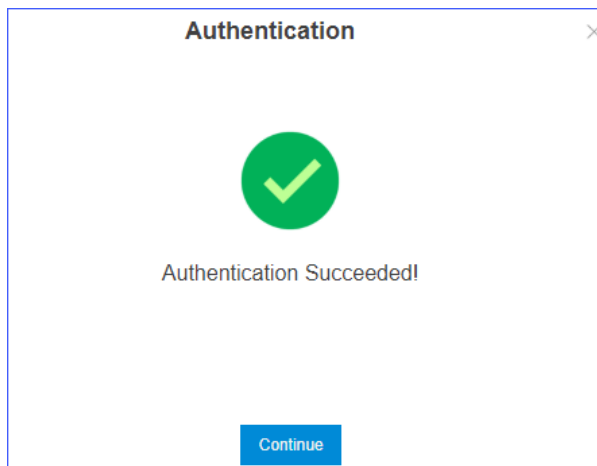

2. Click **Authorize**, the browser automatically opens the Zoho authentication page.

3. In the Zoho authentication page, click **Accept**, and allow the PBX to access data in Zoho account.
4. Back to PBX **Zoho Integration** page.

   If authorization success, the following page will appear, click **Continue**, and associate Zoho user with PBX extension.

Step 3. Associate Zoho users with PBX extensions

To allow Zoho users make calls on Zoho applications, you need to associate their Zoho accounts and extensions.

1. In the **Zoho Integration** page, click ↻ to refresh the user list.
2. Associate Zoho users with PBX extensions:
   - **Associate Automatically**: Zoho users and the extensions with the same email address will be associated directly.
      a. Click **Associate Automatically**.
      b. Click **Yes**.
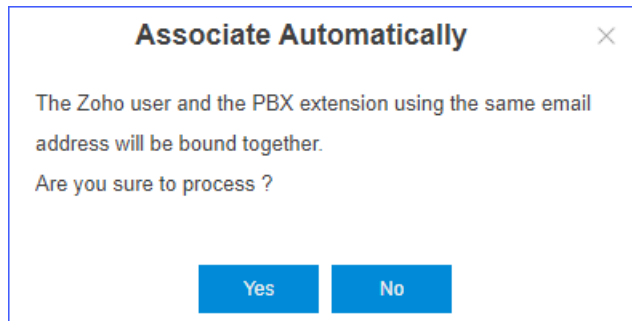
- **Associate Manually**: If a user binds different email addresses to his/her Zoho account and PBX extension, you need to manually associate the user's Zoho User account and PBX extension.
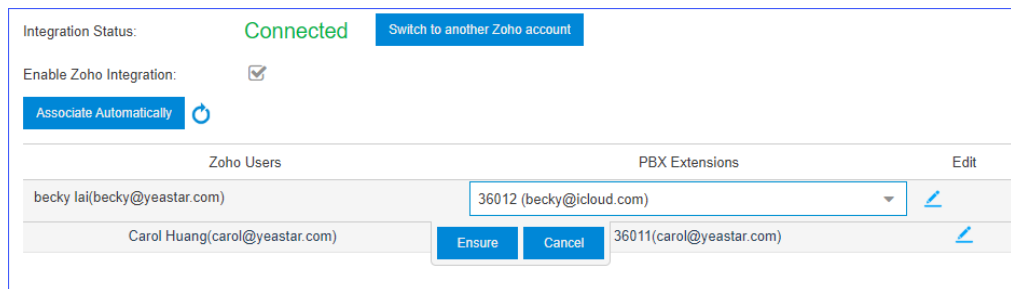
    a. Beside the Zoho user, click ✎, select an extension.
    b. Click **Ensure**.

Use Zoho Integration

After integrating Yeastar Cloud PBX and Zoho applications, the Zoho users can manage calls in Zoho applications.

⚠️ **Important:** Make sure that Zoho users' extensions are registered on IP phones or softphones, otherwise, they cannot handle calls on Zoho applications.

Incoming call pop-ups

When the Zoho user receives an incoming call from Zoho contact via PBX, the user's phone rings, and a Contact Card pop-up in Zoho application.

The Zoho user can quick glance at the essential details and answer call on the phone.

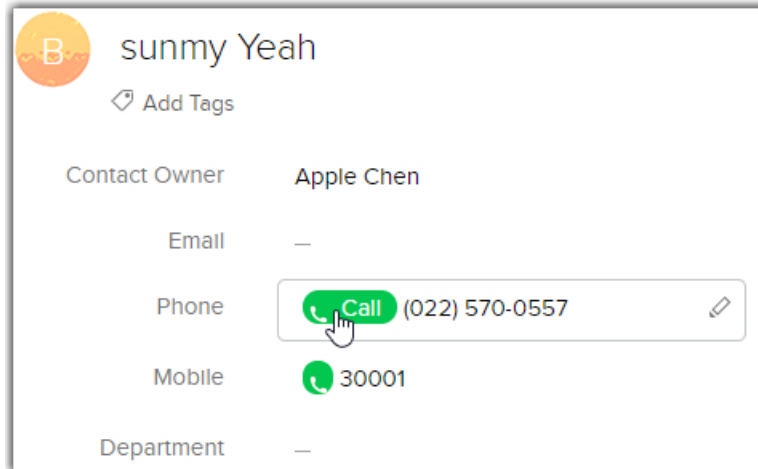## Click-to-Call

A Zoho user can initial a call to Zoho contact in Zoho application.

1. In the contact's detail page, click the green **Call** icon beside the phone number.
    .

   The Zoho user's phone will ring first.

2. The Zoho user answers the call, then the PBX starts to call the contact.

Call control

During a call, the Zoho user can end the call, hold the call, or mute the call.
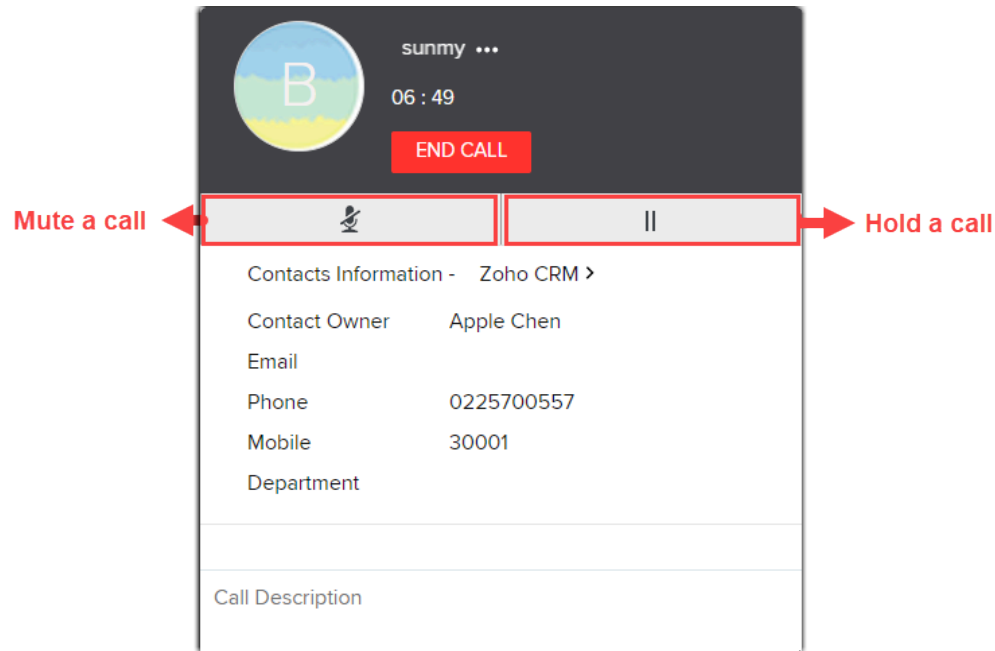
Follow-up activity

After the end of call, Zoho user can do any of the following activities from the Call End window in Zoho application, for subsequent follow-up visits.

- Click **Call** to add a follow-up call.

  Set up reminders for the calls so that you do not miss the opportunity to call the customer.

Create Call

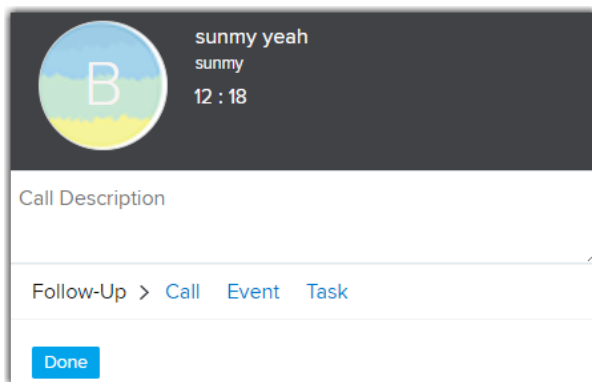|	
Contact Name	Contact bibabo 🔍
Subject	
Call Purpose	None
Related To	Account 🔍
Call Type	Outbound

Schedule Call

Call Start Time

11/21/2019   02:16AM

Description

Done   Cancel

• Click **Task** to create a task.

Task refers to a specific piece of work required to be done within a given time frame. In Zoho CRM, you can create recurring tasks and set reminders to your tasks.

Create Task

Subject

Due Date   MM/DD/YYYY

Priority   High

Owner   Apple Chen ▾

Reminder   ◯

Repeat   ◯

More Fields   ›

Cancel   Save

- Click **Event** to create a event.

  Event refers to an activity that happens at a given place and time. In Zoho CRM, you can create recurring events, set reminders, and add invitees to the event.

View the call log

All outgoing calls, incoming calls, and missed call records on the PBX will be logged on the Zoho application. You can view the call log in **Activities** page.
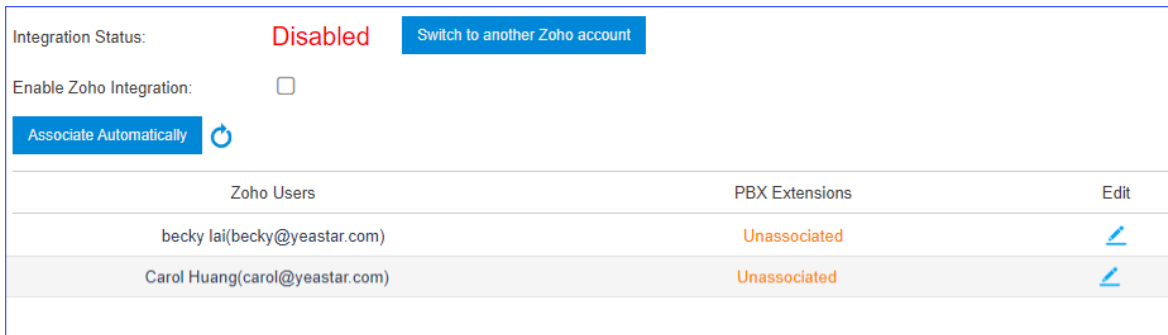

Disable Zoho Integration

You can disable Zoho integration at any time.

📒 **Note:**

- After disabling the Zoho Integration, all the Zoho users can not handle calls in Zoho applications via PBX.
- Call logged before the integration was disabled remain intact.

1. Log in PBX web interface, go to **Zoho Integration**.
2. Unselect the check box of **Enable Zoho Integration**.
   The **Integration Status** displays **Disabled**.

Integration Status:	Disabled	Switch to another Zoho account	
Enable Zoho Integration:	☐		
Associate Automatically	↻		
Zoho Users		PBX Extensions	Edit
becky lai(becky@yeastar.com)		Unassociated	∠
Carol Huang(carol@yeastar.com)		Unassociated	∠

Zoho Integration - FAQ

- [The integration status shows "Error"](#)
- [There is no click-to-call phone icon beside the phone number in the Lead/Contact Details page](#)
- [There is no call pop-up in Zoho CRM when a call comes](#)
- [PBX doesn't display all the Zoho accounts on the Zoho CRM Integration page](#)
- [Failed to integrate the PBX and Zoho application](#)

The integration status shows "Error"

1. Click **Refresh**, the status will be changed to **Connected**.
2. If the integration is still disconnected, do the followings:
   - Check if PBX can access to the Internet or not.
   - Check if the Yeastar Integration is enabled or not on the Zoho applications.
3. If the integration status is still abnormal, contact Yeastar support.

There is no click-to-call phone icon beside the phone number in the Lead/Contact Details page

Check if the Zoho account is associated with the PBX extension.

If fail to associate, you can [associate them manually](#).

There is no call pop-up in Zoho CRM when a call comes

- Check if the Zoho account is associated with the PBX extension.
- Check if the **Caller ID** of PBX extension is consistent with the **Extension**. If not, there is no call pop-up when a call comes.
- Check the Zoho Integration status on the PBX. If the status shows "Error", click **Refresh** to refresh the status.

PBX doesn't display all the Zoho accounts on the Zoho CRM Integration page

- Check if the Zoho accounts are activated on Zoho CRM.

Failed to integrate the PBX and Zoho application

Zoho uses `appcenter.yeastar.com` to interact with Yeastar Cloud PBX. If the PBX is behind the firewall, add `appcenter.yeastar.com` to the firewall allowlist.