Grandstream Networks, Inc.
UCM6xxx IP PBX Series
ZOHO CRM Integration Guide
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INTRODUCTION

Customer relationship management (CRM) is a set of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers.

The UCM6XXX series support four CRM API, SugarCRM, Salesforce CRM, ZOHO CRM and vTiger CRM, allowing users to get full information about their contacts, customers and leads, and save call information details to specific table history for further usage.

This guide contains a step-by-step configuration needed to set up ZOHO CRM with the UCM6XXX.
ZOHO CRM CONFIGURATION

To integrate ZOHO CRM with UCM6XXX, we need firstly to configure ZOHO CRM with following 2 main steps:

1. Generate Authentication Token
2. Set up ZOHO CRM PhoneBridge

Generate Authentication Token

To generate Auth Token in API mode, do the following:

1. Log in to Zoho CRM.
3. In the Zoho Accounts Home page, click Two Factor Authentication.
4. In the Two Factor Authentication page, click on the Manage Application Specific Passwords.

![Figure 1: Two Factor Authentication](image)

5. In the Application Specific Passwords pop-up, do the following:
   a. Enter the Device or App Name
   b. Enter the current password
   c. Click Generate. You will receive the new application-specific password with spaces.
Remove the spaces in password and include in the following API mode URL to generate the Auth Token.


Set up ZOHO CRM PhoneBridge Groups

On the ZOHO CRM web page:

1.  Access settings → Channels → Telephony → PhoneBridge.

2.  Locate Asterisk and click on Integrate.

![Figure 2: ZOHO CRM PhoneBridge](image)

3.  A new page will be displayed listing the integration steps. Click on Continue.
4. Configure PhoneBridge Group with UCM extension as shown on figure below.

The following table lists PhoneBridge settings:

<table>
<thead>
<tr>
<th>PhoneBridge Name</th>
<th>Set a name for the phonebridge.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Identification User</td>
<td>Choose a user from your ZOHO CRM users list.</td>
</tr>
<tr>
<td>User Name</td>
<td>Choose the same user from ZOHO CRM users list.</td>
</tr>
<tr>
<td>User Extension</td>
<td>Set the extension of the user.</td>
</tr>
</tbody>
</table>

**Note:** Step 4 needs to be repeated for each UCM extension that will be used with ZOHO CRM.
UCM6XXX CONFIGURATION

The UCM6XXX series allow the following features using ZOHO CRM:

- Querying
- Updating
- Adding CDR records through ZOHO CRM APIs

Two steps are required to configure UCM6xxx with ZOHO CRM:

1. Admin Configuration.
2. User Configuration.

Admin Configuration

This step is required to configure received calls, add contact phone number, Contact Lookups… These settings will apply to all UCM6XXX users that will be using ZOHO CRM.

ZOHO CRM configuration page can be accessed using admin login at "Web GUI→Value-Added Features→CRM".

![Figure 5: ZOHO CRM Settings](image)

1. Select ZohoCRM from the “CRM System” dropdown list to use the ZOHO CRM and make similar configuration to the above, below are the details:

<table>
<thead>
<tr>
<th>CRM System</th>
<th>Allows users to select a CRM system from the drop-down list, choose ZOHO CRM to use ZOHO CRM.</th>
</tr>
</thead>
</table>

ZOHO CRM Integration Guide
CRM Server Address

Set the CRM Server to: https://crm.zoho.com or https://crm.zoho.com.cn if you are using UCM from China.

Add Unknown Number

Allows to automatically save received calls from numbers not previously logged in ZOHO CRM and add contact phone number to specific table (Contacts, Leads…).

Contact Lookups

Selects CRM tables that will be used to lookup for contact details when making/receiving calls. Press to select where the UCM can perform the lookups on the CRM tables.

Once users finish configuring above settings using admin access:

1. Click on and
2. Click on
3. Logout from admin access.

**User Configuration**

This configuration is per user, it will allow users to authenticate and sync up with ZOHO CRM platform.

*Note:* Admin Configuration needs to be set before enabling CRM for users.

1. Access to the UCM web GUI as user and go to “User Portal→Value-added Features→CRM User Settings”.
2. Click on “Enable CRM”.
3. Enter the Security Token associated with your ZOHO CRM account. Refer to [Generate Authentication Token].
4. Click on and

The status will change from “Logged Out” to “Logged In” and users can start using ZOHO CRM.
CONTACTS LOOKUP

Using Grandstream Affinity software, users can receive incoming calls to their GXP IP Phones in their PC as well, the following link explains how to install and configure Grandstream Affinity software.


When receiving an incoming call from an existing contact on ZOHO CRM, the contact’s name will be displayed on the phone’s LCD and more data will be shown on GrandstreamAffinity application.

The following figure shows an example of the result.

![Call popup on GrandstreamAffinity](image)

**Figure 7: Call popup on GrandstreamAffinity**

Users can click on the **View Contact** button to be redirected to contact’s page for more details about the contact or to edit specific data.

New contacts will be automatically added to the CRM and it’s up to the user to update their Data.

![New Contact added to “Contacts” Table](image)

**Figure 8: New Contact added to “Contacts” Table**
CALL REPORTING

Users can see reports of their calls on ZOHO CRM from Reports → Activity reports → Todays Calls:

<table>
<thead>
<tr>
<th>SUBJECT</th>
<th>CALL TYPE</th>
<th>CALL PURPOSE</th>
<th>CALL START TIME</th>
<th>CALL DURATION</th>
<th>FULL NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created Inbound Call from 212621175203 to 1200</td>
<td>Inbound</td>
<td></td>
<td>01/04/2018 03:53 AM</td>
<td>00:00</td>
<td></td>
</tr>
<tr>
<td>Created Inbound Call from 0673173040 to 1200</td>
<td>Inbound</td>
<td></td>
<td>01/04/2018 04:00 AM</td>
<td>00:02</td>
<td></td>
</tr>
<tr>
<td>Created Inbound Call from 212621175203 to 1200</td>
<td>Inbound</td>
<td></td>
<td>01/04/2018 03:49 AM</td>
<td>00:00</td>
<td></td>
</tr>
<tr>
<td>Created Inbound Call from 212621175203 to 1200</td>
<td>Inbound</td>
<td></td>
<td>01/04/2018 03:57 AM</td>
<td>00:00</td>
<td></td>
</tr>
</tbody>
</table>

TOTAL RECORDS IN THIS PAGE: 4 RECORDS

Figure 9: Call Reporting on ZOHO CRM