



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.
2. Open <https://accounts.zoho.com> .
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**.

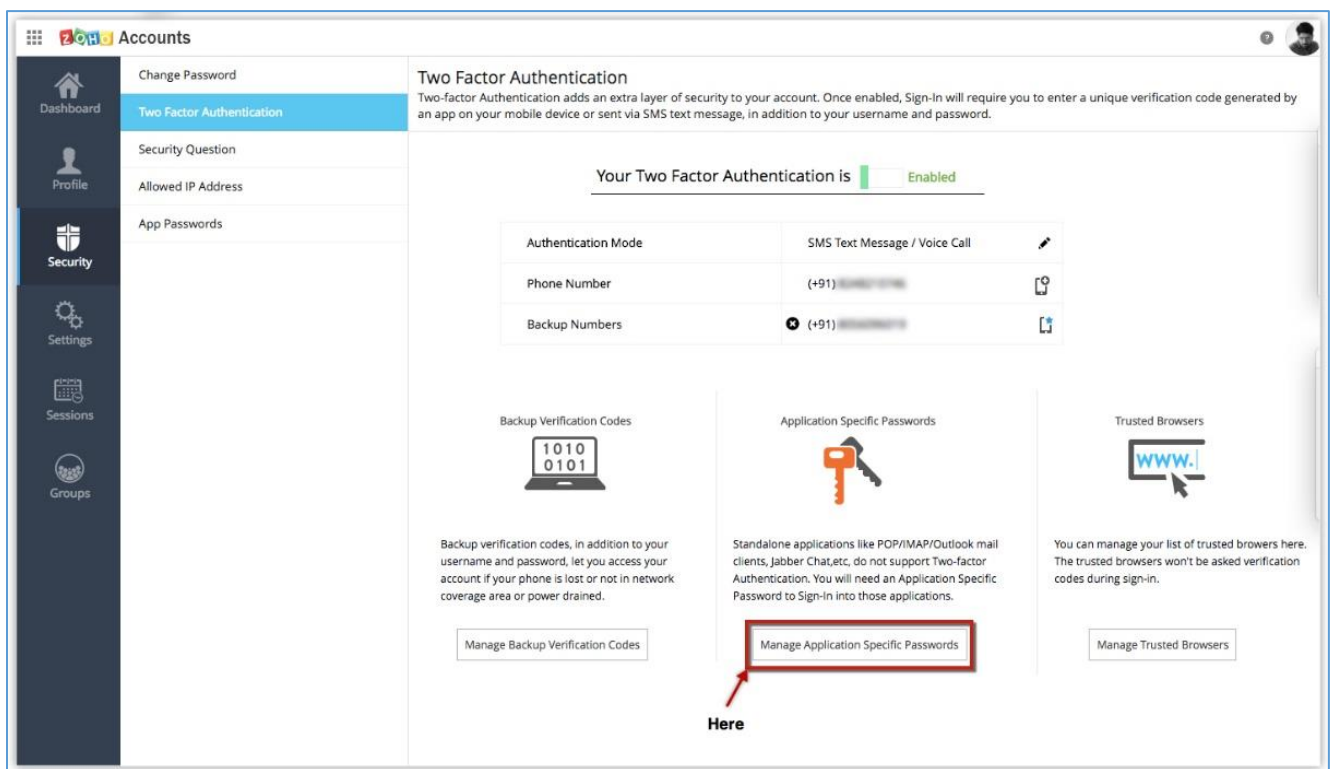


Figure 1: Two Factor Authentication

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.

- d. `https://accounts.zoho.com/apiauthtoken/nb/create?SCOPE=ZohoCRM/crmapi&EMAIL_ID=[Username/EmailID]&PASSWORD=[Password]&DISPLAY_NAME=[ApplicationName]`

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**.

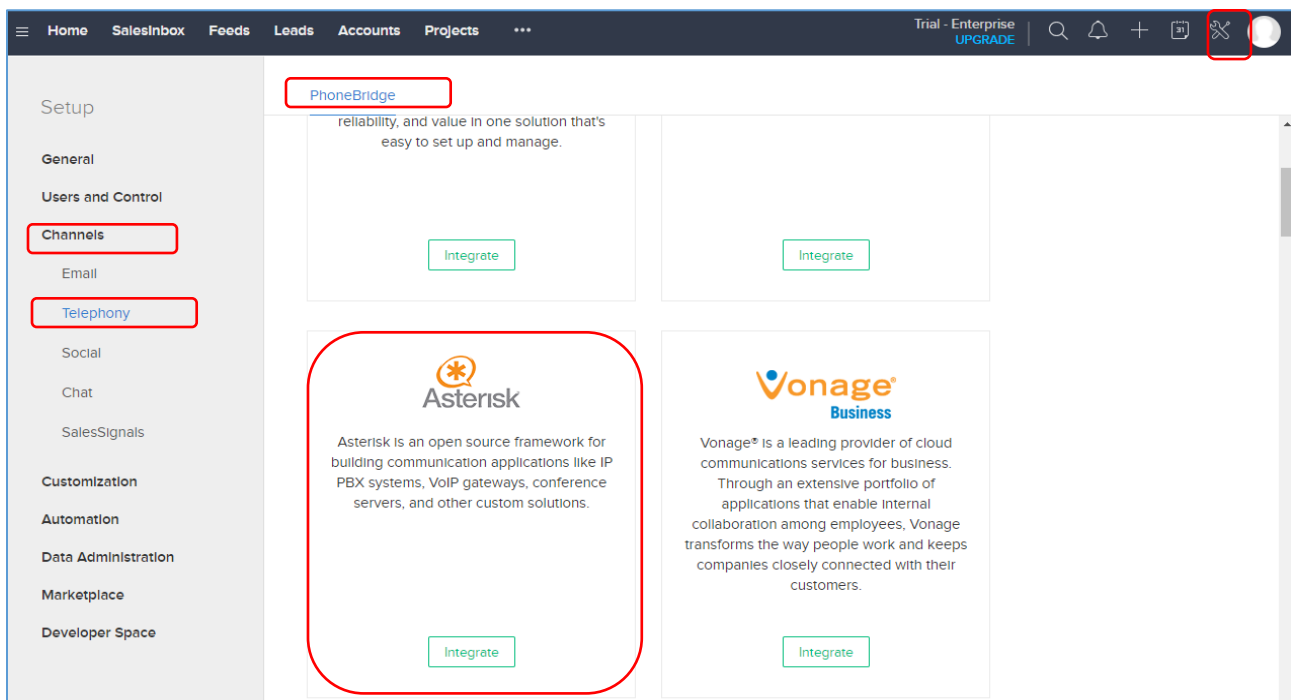


Figure 2: ZOHO CRM PhoneBridge

3. A new page will be displayed listing the integration steps. Click on **Continue**.



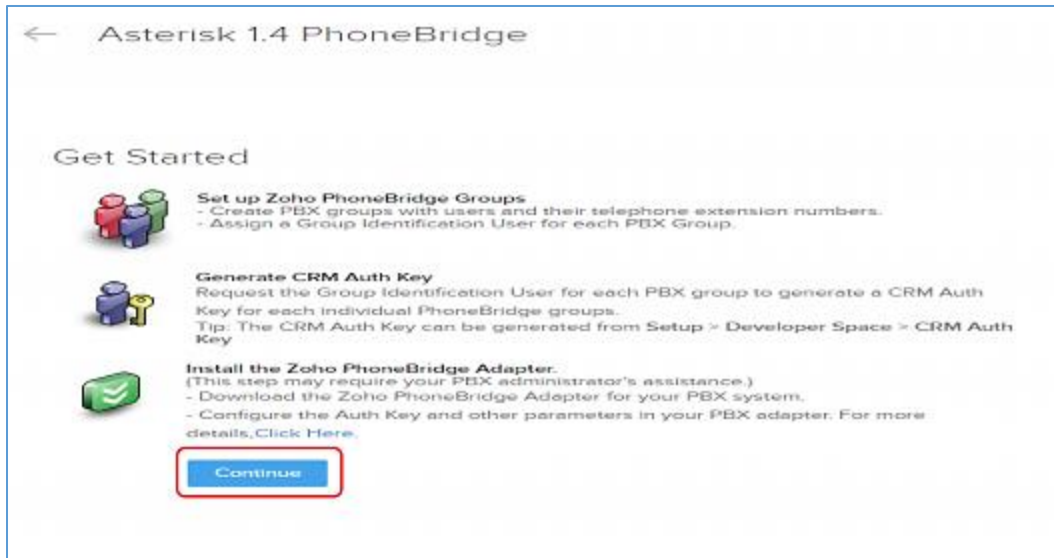


Figure 3 : Asterisk PhoneBridge

4. Configure PhoneBridge Group with UCM extension as shown on figure below.

Figure 4: Setup PhoneBridge Group

The following table lists PhoneBridge settings:

Table 1: PhoneBridge settings

PhoneBridge Name	Set a name for the phonebridge.
Group Identification User	Choose a user from your ZOHO CRM users list.
User Name	Choose the same user from ZOHO CRM users list.
User Extension	Set the extension of the user.

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”**.

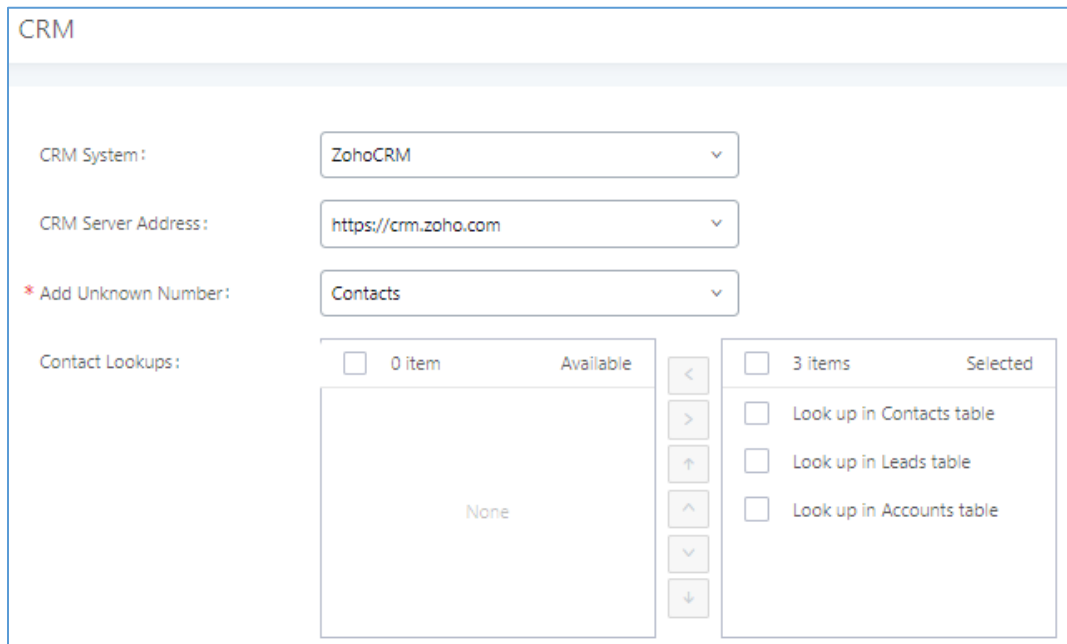



Figure 5: ZOHO CRM Settings

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:


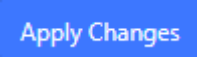
Table 2: ZOHO CRM Settings

CRM System	Allows users to select a CRM system from the drop-down list, choose ZOHOCRM to use ZOHO CRM.
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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

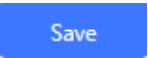
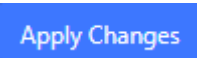
Once users finish configuring above settings using admin access:

2. Click on  and .
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.

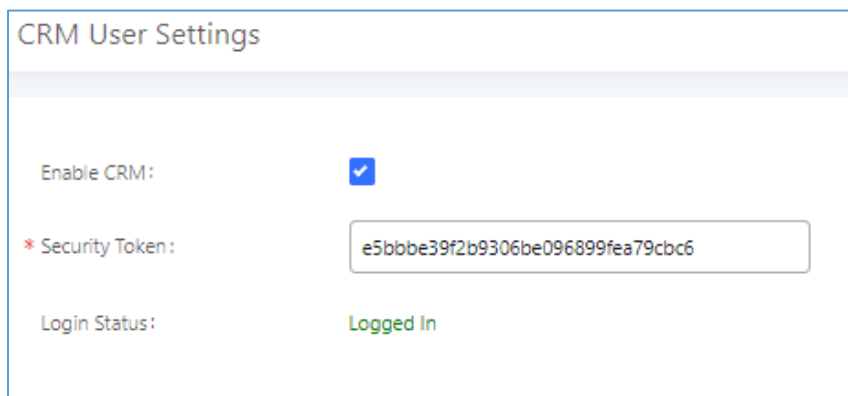


Figure 6: CRM User Settings

Table 3: CRM User Settings

Enable CRM	Enable CRM for the user account.
Security Token	Enter security token of your Zoho CRM account.



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.

http://www.grandstream.com/sites/default/files/Resources/GS_Affinity_Guide.pdf

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.

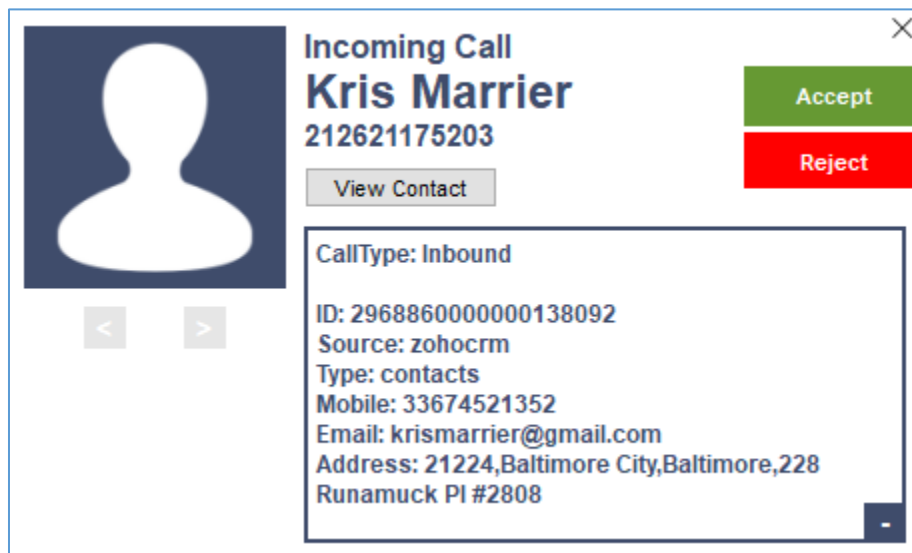


Figure 7: Call popup on GrandstreamAffinity

Users can click on the 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.



	CONTACT NAME	ACCOUNT NAME	EMAIL	PHONE	CONTACT OWNER
<input type="checkbox"/>	0673173040			(067) 317-3040 	User1
<input type="checkbox"/>	Kris Marrier	Grandstream	krismarrier@gmail.com	212621175203 	User1

Figure 8: New Contact added to "Contacts" Table



CALL REPORTING

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

SUBJECT	CALL TYPE	CALL PURPOSE	CALL START TIME	CALL DURATION	FULL NAME
Created Inbound Call from 212621175203 to 1200	Inbound		01/04/2018 03:53 AM	00:00	
Created Inbound Call from 0673173040 to 1200	Inbound		01/04/2018 04:00 AM	00:02	
Created Inbound Call from 212621175203 to 1200	Inbound		01/04/2018 03:49 AM	00:00	
Created Inbound Call from 212621175203 to 1200	Inbound		01/04/2018 03:57 AM	00:00	
TOTAL RECORDS IN THIS PAGE : 4 RECORDS					

Figure 9: Call Reporting on ZOHO CRM

