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 both version of ZOHO CRM with the UCM6XXX.

ZOHO V1 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**.

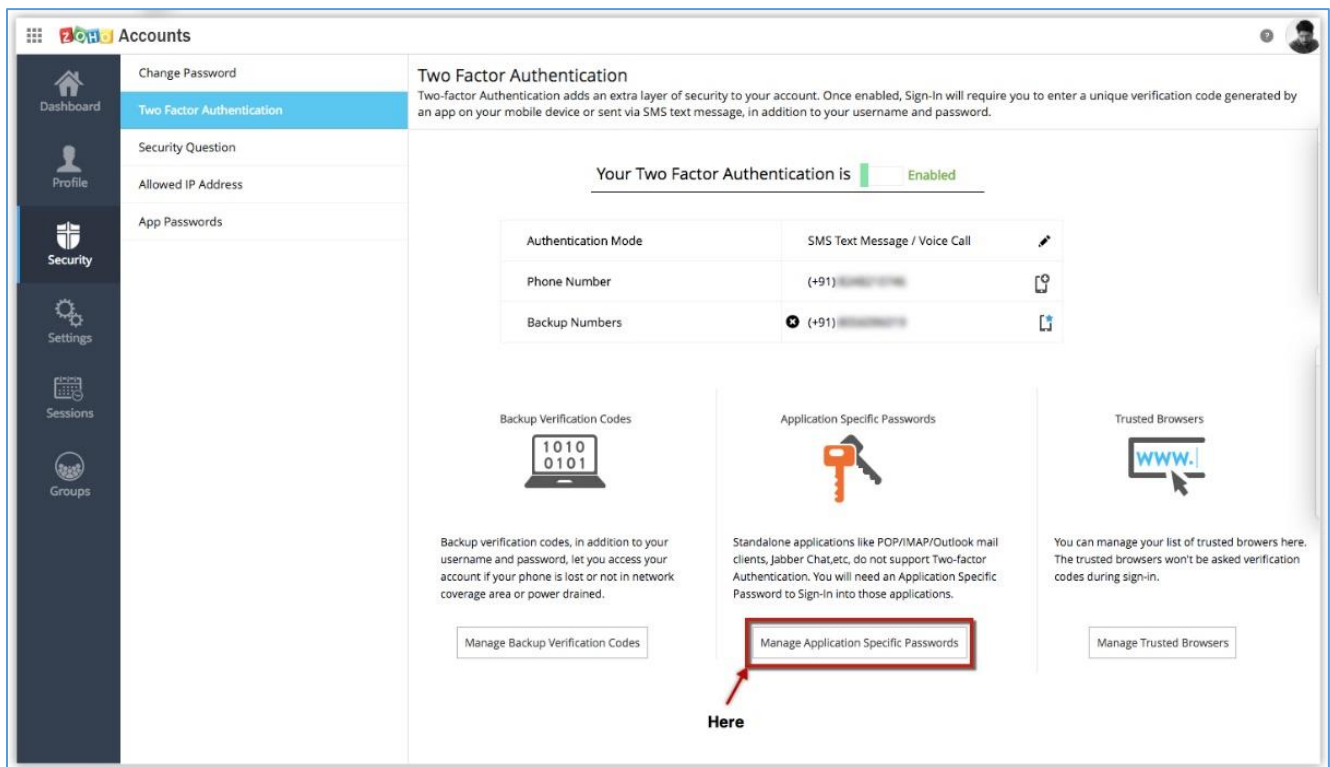**Figure 1: Two Factor Authentication**

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 [icon] → Channels → Telephony → PhoneBridge.
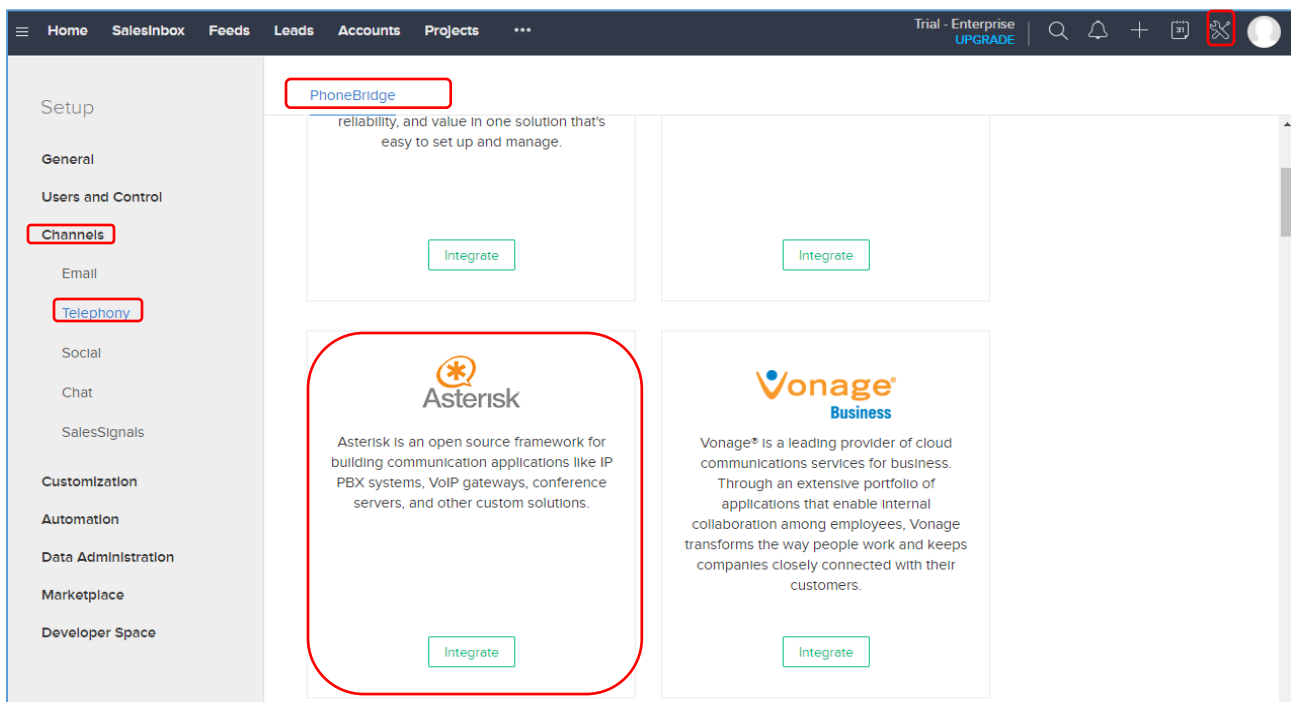
2. Locate **Asterisk** and click on **Integrate**.

Figure 2: ZOHO CRM PhoneBridge

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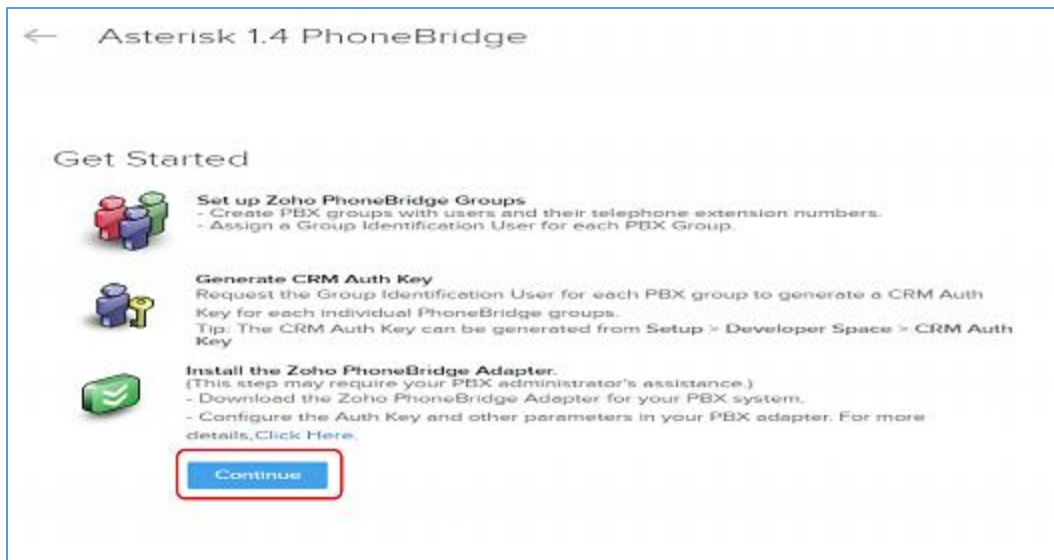
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Figure 3 : Asterisk PhoneBridge

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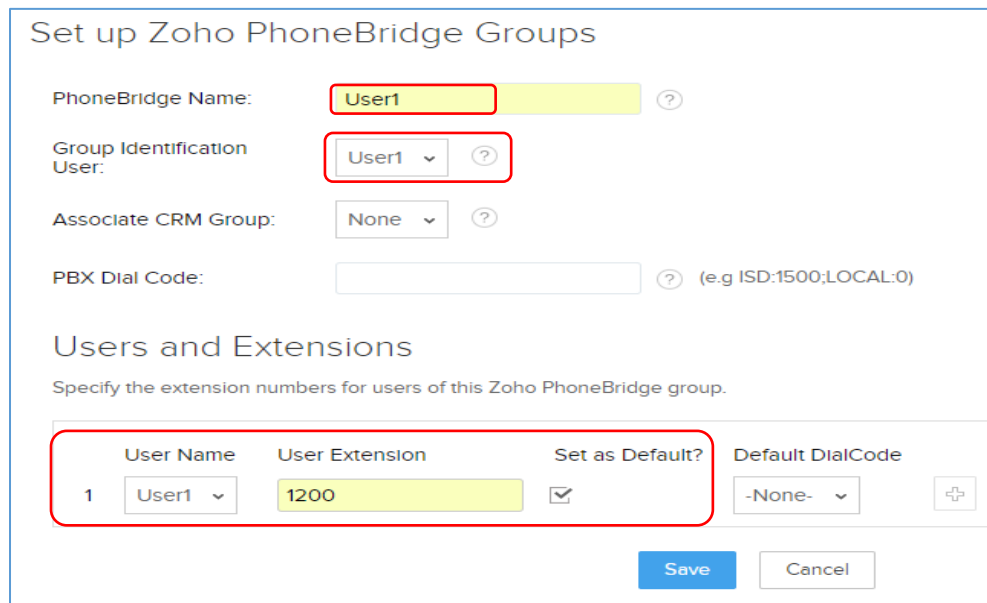

Figure 4: Setup PhoneBridge Group

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.

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UCM6XXX CONFIGURATION FOR ZOHO V1

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 .

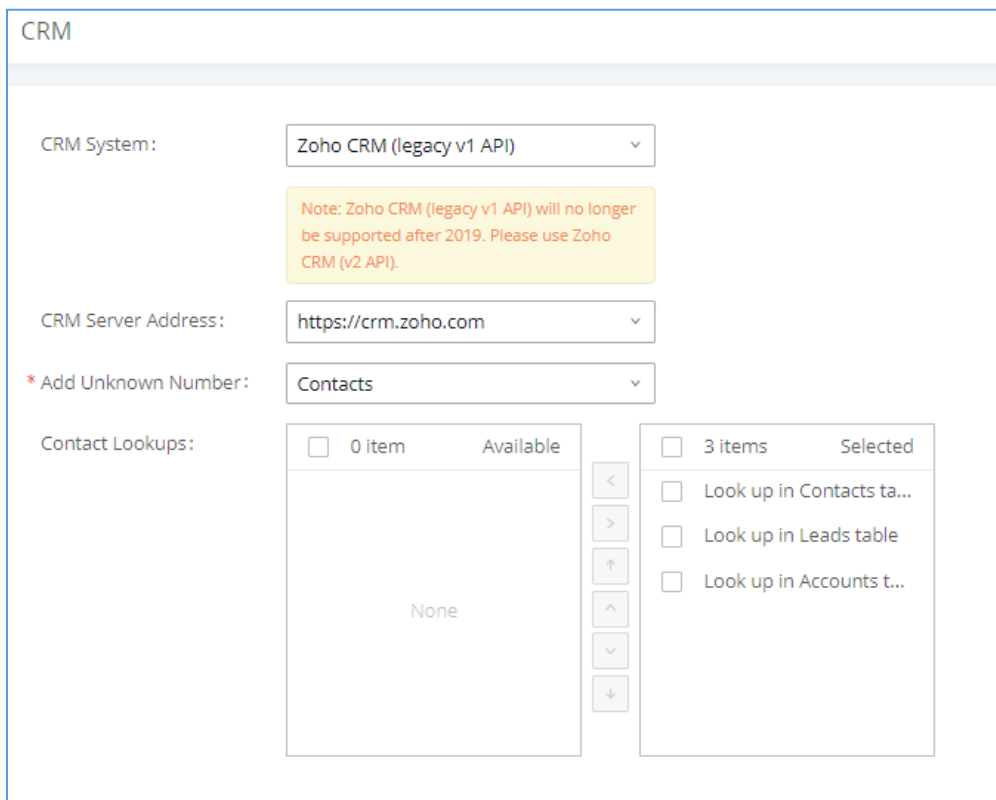ZOHO CRM configuration page can be accessed using admin login at "**Web GUI→Value-Added Features→CRM**".
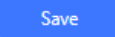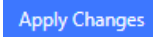

Figure 5: ZOHO CRM v1 Settings

1. Select **Zoho CRM (legacy v1 API)** from the "CRM System" dropdown list to use the ZOHO CRM and make similar configuration to the above, below are the details:

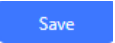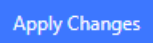| CRM System	Allows users to select a CRM system from the drop-down list, choose Zoho CRM (legacy v1 API) to use ZOHO CRM version 1.
CRM Server Address	Set the CRM Server to: https://crm.zoho.com or https://crm.zoho.com.cn if you are using UCM from China or https://crm.zoho.eu if you are using UCM from Europe.
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 **Save** and **Apply Changes**.
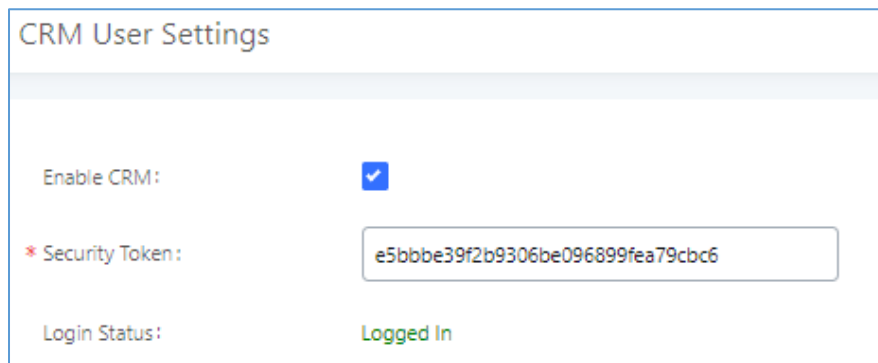
3. Logout from admin access.

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 **Save** and **Apply Changes**.

The status will change from "**Logged Out**" to "**Logged In**" and users can start using ZOHO CRM.

Figure 6: CRM User Settings

ZOHO V2 CRM CONFIGURATION

To integrate ZOHO v2 CRM with UCM6XXX, we need firstly to configure ZOHO CRM with following main steps:

1. **Generate Client ID and Client Secret**
2. **Generate Refresh Token**

Generate Client ID and Client Secret

To generate Client ID and Client Secret in API mode, do the following:

1. Log in to Zoho CRM.

2. Go to accounts.zoho.com/developerconsole.

3. Click Add **Client ID**.

4. Enter a valid Client Name and Client Domain.

5. Enter **Authorized redirect URIs**. It is the callback URL that should be given while registering your app with Zoho. This determines where the API server has to redirect the user after completing the authorization flow. The value of this parameter must exactly match with one of the **redirect_uri** values that is listed for your project in the Zoho's Developer Console.
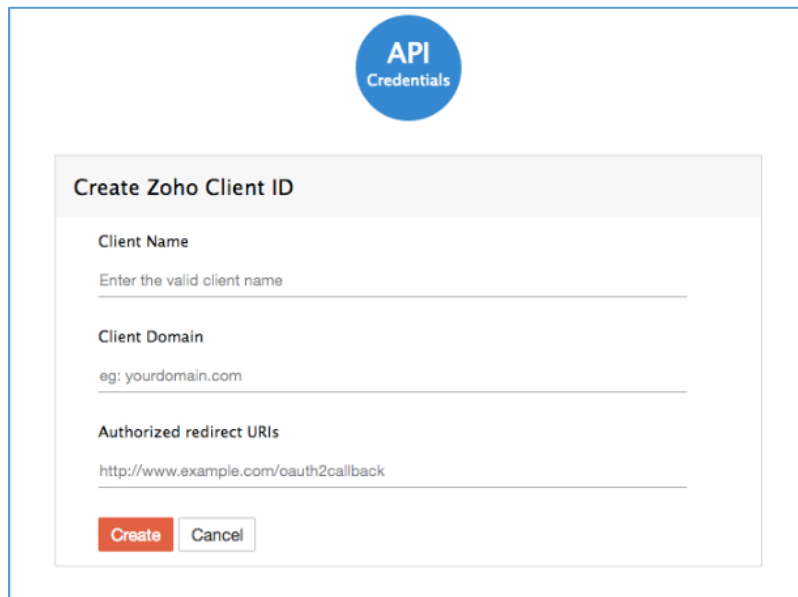
Figure 7: Create Zoho Client ID

Once your app is registered, you will receive the following details:

- **client_id**: It is the id generated from Zoho's Developer Console . For applications that use the OAuth 2.0 protocol to call Writer APIs, this client ID will be used to generate an **access_token**.

- **client_secret**: The client secret code that is generated from the Zoho's Developer Console.
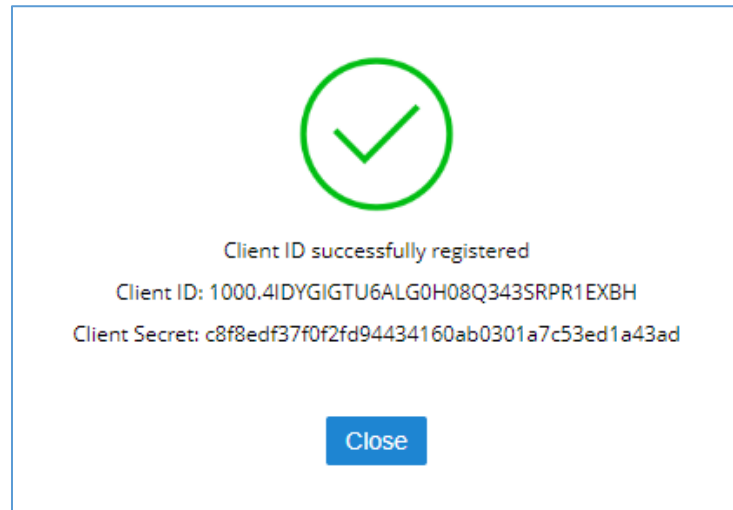
Figure 8: Client ID successfully registered

Note:

If you don't have a domain name and a redirect URL, you can use dummy values in their place and register your client.

Authorization Request

To authorize your application, you need to redirect the user of the client application to the suitable authorization endpoint. On successful login, Zoho CRM will call your redirect URI along with an authorization code.

You can obtain the grant token in one of the following ways:

- Redirection-based code generation
- Self-Client option

In this guide we will be using the Self-Client option since our application does not have a domain and a redirect URL.

Self-Client option

1. Click on the vertical-ellipsis on the client row and select Self-Client.
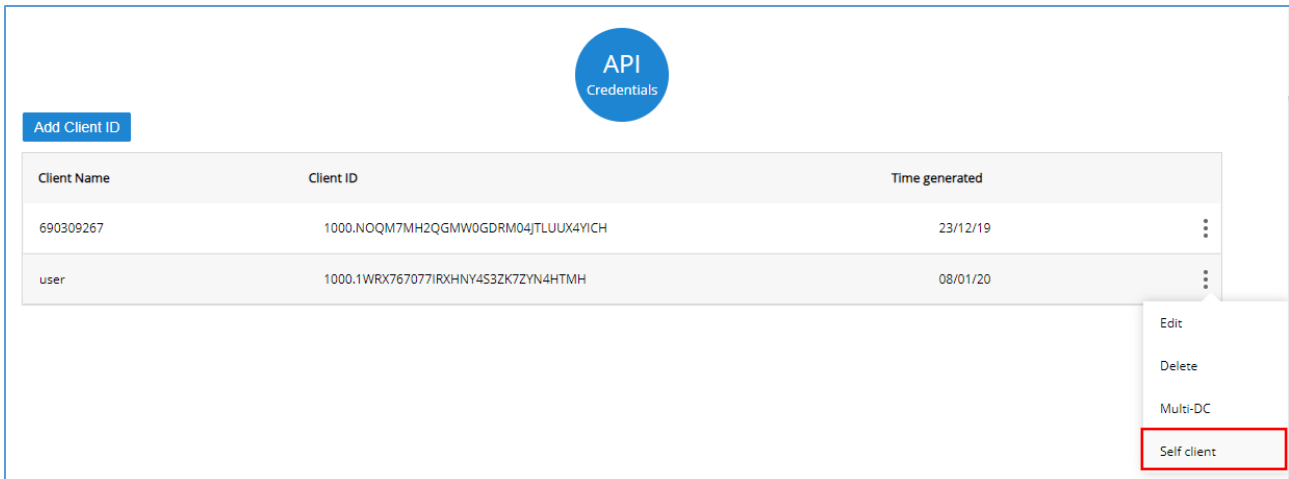
Figure 9: Self Client method

2. Enter valid scope for the client. You can enter multiples scope for a client at a time. In this guide we used the following Scope:

   ZohoCRM.modules.leads.ALL,ZohoCRM.modules.deals.ALL,ZohoCRM.settings.ALL

3. Choose the expiry time from the drop-down. This indicates the time the grant token(code) is valid for.
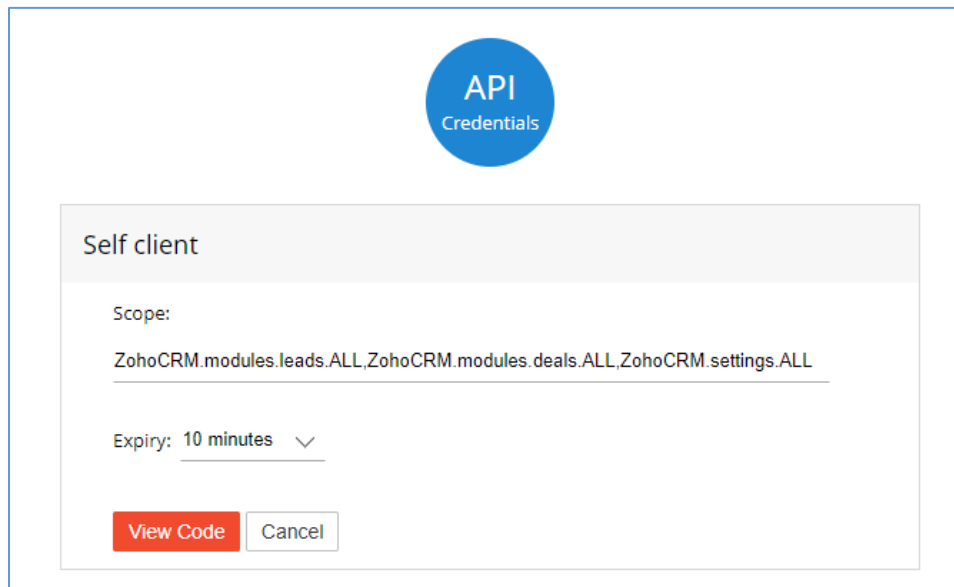

Figure 10: Get the grant token(code)

4. Click **View Code** to display the code. This is the Grant Token. Save this code and click **Close**.
5. Use this grant token to Generate Access and Refresh Tokens.

Generate Refresh Token

To generate the refresh token, user needs to make a POST request with the following URL: https://accounts.zoho.com/oauth/v2/token and the below parameters in the body of the request:

Table 3: URL parameters

Parameter	Description
grant_type	Enter the value as "**authorization_code**".
client_id	Specify client-id obtained from the connected app.
client_secret	Specify client-secret obtained from the connected app.
redirect_uri	Specify the Callback URL that you registered during the app registration.
code	Enter the grant token generated from previous step.

If the request is successful, you would receive the following:

```
{
    "access_token": "{access_token}",
    "refresh_token": "{refresh_token}",
    "api_domain": "https://www.zohoapis.com",
    "token_type": "Bearer",
    "expires_in": 3600
}
```

UCM6XXX CONFIGURATION FOR ZOHO V2

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 Lookup etc. 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".**
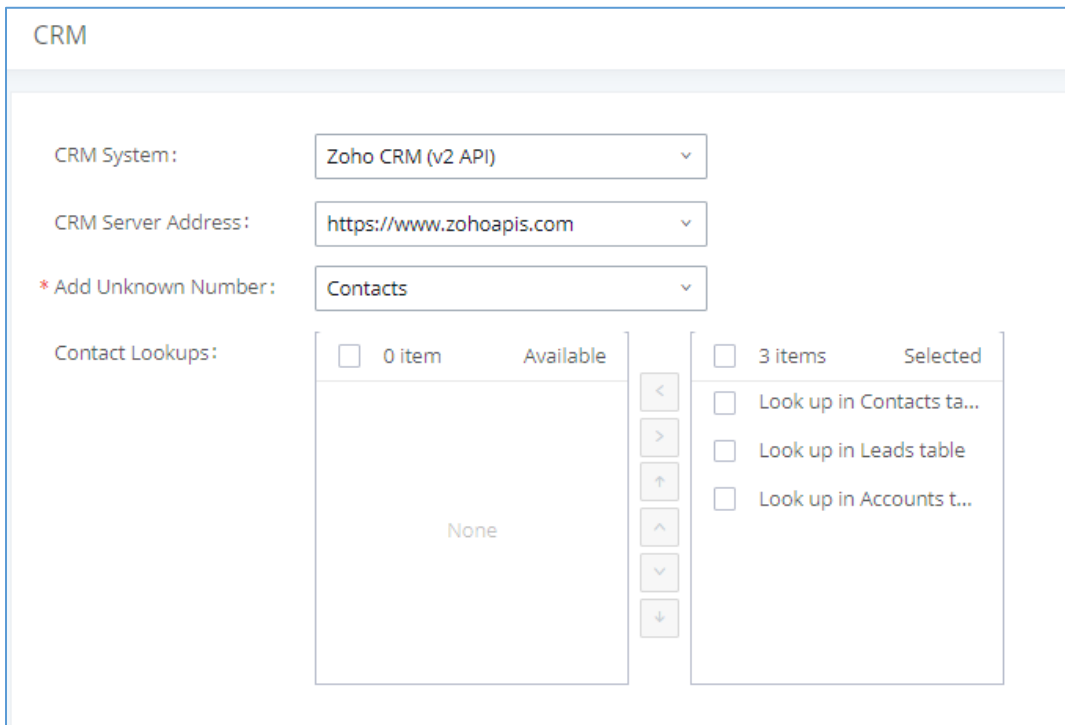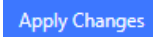

Figure 11: Zoho CRM v2 Settings

1. Select **Zoho CRM (v2 API)** from the "CRM System" dropdown list to use the ZOHO CRM and make similar configuration to the above, below are the details:

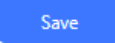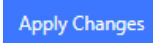| CRM System	Allows users to select a CRM system from the drop-down list, choose Zoho CRM (v2 API) to use ZOHO CRM version 2.
CRM Server Address	Set the CRM Server to: https://crm.zohoapis.com or https://crm.zohoapis.com.cn if you are using UCM from China or https://www.zohoapis.eu if you are using UCM from Europe.
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

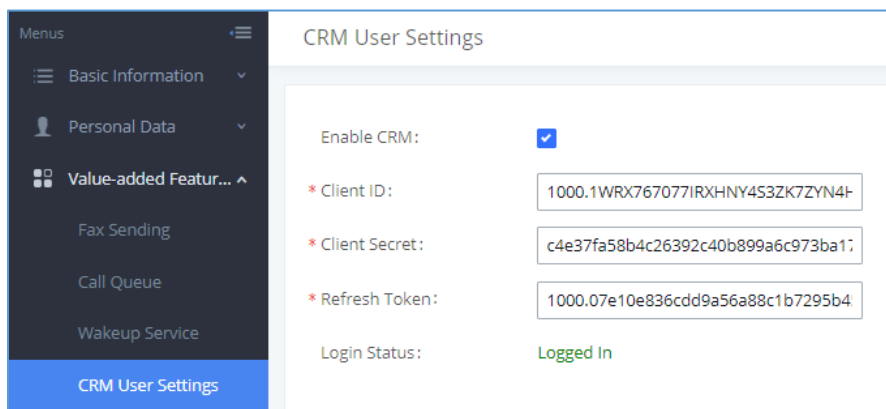Once users finish configuring above settings using admin access:

2. Click on **Save** and **Apply Changes**.
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 generated Client ID, Client Secret and Refresh Token with your ZOHO CRM account.
4. Click on **Save** and **Apply Changes**.
5. The status will change from "Logged Out" to "Logged In" and users can start using ZOHO CRM.

Figure 12: CRM User Settings

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.

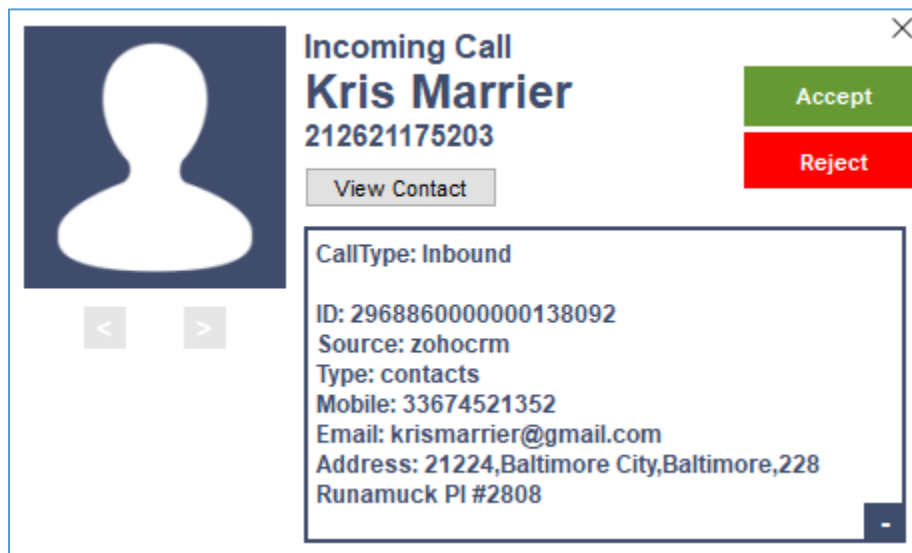The following figure shows an example of the result.

Figure 13: 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.

Figure 14: New Contact added to "Contacts" Table

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CALL REPORTING

Users can see reports of their calls on ZOHO CRM from Reports → Activity reports → Todays 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 15: Call Reporting on ZOHO CRM

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