

# 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.

	Change Password	Two Factor Authentication		
Dashboard	Two Factor Authentication	Two-factor Authentication adds an extra layer of secu an app on your mobile device or sent via SMS text mo	rity to your account. Once enabled, Sign-In will requir essage, in addition to your username and password.	e you to enter a unique verification code generated by
1	Security Question			
Profile	Allowed IP Address	Your Two Facto	or Authentication is Enabled	
#	App Passwords	Authentication Mode	SMS Text Message / Voice Call	1
Security		Phone Number	(+91)	C
O <sub>0</sub>		Backup Numbers	(+91)	1
Sessions		Backup Verification Codes	Application Specific Passwords	Trusted Browsers
Groups			<b>f</b>	www.i
		Backup verification codes, in addition to your username and password, let you access your account if your phone is lost or not in network coverage area or power drained.	Standalone applications like POP/IMAP/Outlook mail clients, Jabber Chat,etc, do not support Two-factor Authentication. You will need an Application Specific Password to Sign-In into those applications.	You can manage your list of trusted browers hen The trusted browsers won't be asked verification codes during sign-in.
		Manage Backup Verification Codes	Manage Application Specific Passwords	Manage Trusted Browsers
			/	

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=[Usern ame/EmailID]&PASSWORD=[Password]&DISPLAY\_NAME=[ApplicationName]

### Set up ZOHO CRM PhoneBridge Groups

On the ZOHO CRM web page:

- 1. Access settings  $\rightarrow$  Channels  $\rightarrow$  Telephony  $\rightarrow$  PhoneBridge.
- 2. Locate Asterisk and click on Integrate.

$\equiv$ Home SalesInbox Feeds	Leads Accounts Projects •••	Trial - Enterp UPGR	ргізе   Q Д + 🗉 🔀 🕕
Setup	PhoneBridge reliability, and value in one solution that's		
General	easy to set up and manage.		
Users and Control			
Channels	Integrate	Integrate	
Telephony			
Social			
Chat	Asterisk	Vonage <sup>®</sup> Business	
SalesSignals	Asterisk is an open source framework for building communication applications like IP	Vonage® is a leading provider of cloud communications services for business.	
Customization	PBX systems, VoIP gateways, conference servers, and other custom solutions.	Through an extensive portfolio of applications that enable internal	
Automation		collaboration among employees, Vonage	
Data Administration		companies closely connected with their	
Marketplace		customers.	
Developer Space	Integrate	Integrate	

Figure 2: ZOHO CRM PhoneBridge

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





← Aste	erisk 1.4 PhoneBridge
Get Sta	arted
÷	Set up Zoho PhoneBridge Groups - Create PBX groups with users and their telephone extension numbers. - Assign a Group Identification User for each PBX Group.
8	Generate CRM Auth Key Request the Group Identification User for each PBX group to generate a CRM Auth Key for each individual PhoneBridge groups. Tip: The CRM Auth Key can be generated from Setup > Developer Space > CRM Auth Key
	Install the Zoho PhoneBridge Adapter. (This step may require your PBX administrator's assistance.) - Download the Zoho PhoneBridge Adapter for your PBX system. - Configure the Auth Key and other parameters in your PBX adapter. For more details, Click Here

Figure 3 : Asterisk PhoneBridge

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

Set up Zoho PhoneBridge G	roups
PhoneBridge Name: User1	0
Group Identification User1 • ?	)
Associate CRM Group: None 🗸 ?	
PBX Dial Code:	(e.g ISD:1500;LOCAL:0)
Users and Extensions Specify the extension numbers for users of this Z	oho PhoneBridge group.
User Name User Extension	Set as Default? Default DialCode
1 User1 - 1200	-None- ▼
	Save Cancel

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 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".

CRM			
CRM System:	Zoho CRM (legacy v1 API)	×	]
	Note: Zoho CRM (legacy v1 API) will n be supported after 2019. Please use Z CRM (v2 API).	o longer Zoho	
CRM Server Address:	https://crm.zoho.com	~	]
* Add Unknown Number:	Contacts	~	]
Contact Lookups:	0 item Available	< < < < < < < < < < < <	3 items Selected   Look up in Contacts ta   Look up in Leads table   Look up in Accounts t
		J L	

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:





#### Table 2: ZOHO v1 CRM Settings

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: <u>https://crm.zoho.com</u> or <u>https://crm.zoho.com.cn</u> if you are using UCM from China or <u>https://crm.zoho.eu</u> 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.

<b>~</b>	Enable CRM:
	Enable 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.

	<b>API</b> Credentials	
Create	Zoho Client ID	
Client	Name	
Enter th	ne valid client name	_
Client	Domain	
eg: you	rdomain.com	_
Author	ized redirect URIs	
http://w	/ww.example.com/oauth2callback	
Creat	e Cancel	

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.





Add Client ID						
Client Name	Client ID	Time generated				
690309267	1000.NOQM7MH2QGMW0GDRM04JTLUUX4YICH	23/12/19				
user	1000.1WRX767077IRXHNY4S3ZK7ZYN4HTMH	08/01/20	:			
			Edit			
			Delete			
			Multi-DC			
			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.

6-1	
Sel	rclient
-	cope: ZohoCRM.modules.leads.ALL,ZohoCRM.modules.deals.ALL,ZohoCRM.settings.ALL
	soning 10 minutes

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: <u>https://accounts.zoho.com/oauth/v2/token</u> 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".

CRM			
CRM System:	Zoho CRM (v2 API)	~	]
CRM Server Address:	https://www.zohoapis.com	~	]
* Add Unknown Number :	Contacts	~	]
Contact Lookups:	0 item Available	<	3 items Selected   Look up in Contacts ta   Look up in Leads table   Look up in Accounts t

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:





#### Table 4: Zoho v2 CRM Settings

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: <u>https://crm.zohoapis.com</u> or <u>https://crm.zohoapis.com.cn</u> if you are using UCM from China or <u>https://www.zohoapis.eu</u> 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.

- 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.

Menus 🗲	CRM User Settings	
😑 Basic Information 🕞		
👤 Personal Data 🗸 🗸	Enable CRM :	
📲 Value-added Featur 🔺	* Client ID:	1000.1WRX767077IRXHNY4S3ZK7ZYN4F
Fax Sending	* Client Secret :	c4e37fa58b4c26392c40b899a6c973ba1;
Call Queue	* Refresh Token :	1000.07e10e836cdd9a56a88c1b7295b4
Wakeup Service	Login Status:	Logged In
CRM User Settings		

#### 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.

		Incoming Call Kris Marrier	× Accept
		View Contact	Reject
<	2	CallType: Inbound ID: 296886000000138092 Source: zohocrm Type: contacts	
		Mobile: 33674521352 Email: krismarrier@gmail.com Address: 21224,Baltimore City,Baltimor Runamuck PI #2808	re,228

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.

□.	CONTACT NAME	ACCOUNT NAME	EMAIL	PHONE	CONTACT OWNER
	0673173040			(067) 317-3040 🕓	User1
	Kris Marrier	Grandstream	krismarrier@gmail.com	212621175203 🕓	User1

Figure 14: New Contact added to "Contacts" Table





# **CALL REPORTING**

Users can see reports of their calls on ZOHO CRM from Reports  $\rightarrow$  Activity reports  $\rightarrow$  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		1			

Figure 15: Call Reporting on ZOHO CRM

