



The Integration of MyPBX and Salesforce CRM

Version 1.0

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1. Overview

Salesforce CRM solutions help ensure that your sales, marketing, and support efforts are all working toward a common goal, so you can take your business success to a whole new level. Streamline and automate business processes, give everyone in your company a complete view of the customer, provide deeper analysis and insight into critical sales and customer metrics, and keep everyone focused on getting new customers while keeping the ones you already have happy.

MyPBX could work perfectly with Salesforce CRM and help you to achieve the following features:

- Click to call.
- Incoming and outgoing call popup.
- Take a note during a call.
- Check call log in Salesforce CRM.

Note:

In this integration we need use third party software “Callinize” which is a SaaS solution that bridges MyPBX and Salesforce CRM. The Callinize is an extension of Chrome, therefore you need to install Chrome firstly. In this guide both Salesforce and Callinize are trial version.

This guide refers to the following links:

<https://callinize.zendesk.com/hc/en-us/articles/205033515>

<https://callinize.zendesk.com/hc/en-us/categories/200221529-Users-Agents>

<https://callinize.zendesk.com/hc/en-us/articles/203269815-Asterisk-Integration>

<https://callinize.zendesk.com/hc/en-us/articles/204547935-How-Does-it-Work-in-Salesforce->

For any problem occurred during the Callinize installation, please contact Callinize support.

2. Install Callinize

2.1 Sign up for Callinize

Log in the Callinize official website <https://www.callinize.com>, then sign up a account. Please choose the correct CRM and Phone system.

COMPANY:

Yeastar

Company already signed up.

PHONE NUMBER:

+861383883883

WHICH CRM DO YOU USE?

Salesforce

WHICH PHONE SYSTEM DO YOU HAVE?

Asterisk

By signing up for Callinize you agree to our [terms of use](#) and [privacy policy](#).

- **CRM**
Salesforce
- **PHONE SYSTEM**
Asterisk

Figure 2-1 Sign up a Callinize

2.2 Connect Salesforce CRM to Callinize

Click “connect with production” and input the user name and password of the Salesforce, then Salesforce and Callinize are connected.



Salesforce

connect with production
works for active, trial or developer orgs (live data)

connect in sandbox
test with a copy of your production org

Figure 2-2 Connect Callinize with Salesforce

2.3 Connect MyPBX with Callinize

At Asterisk option chose asterisk and in the Host filed please fill in the public IP address or domain of MyPBX.

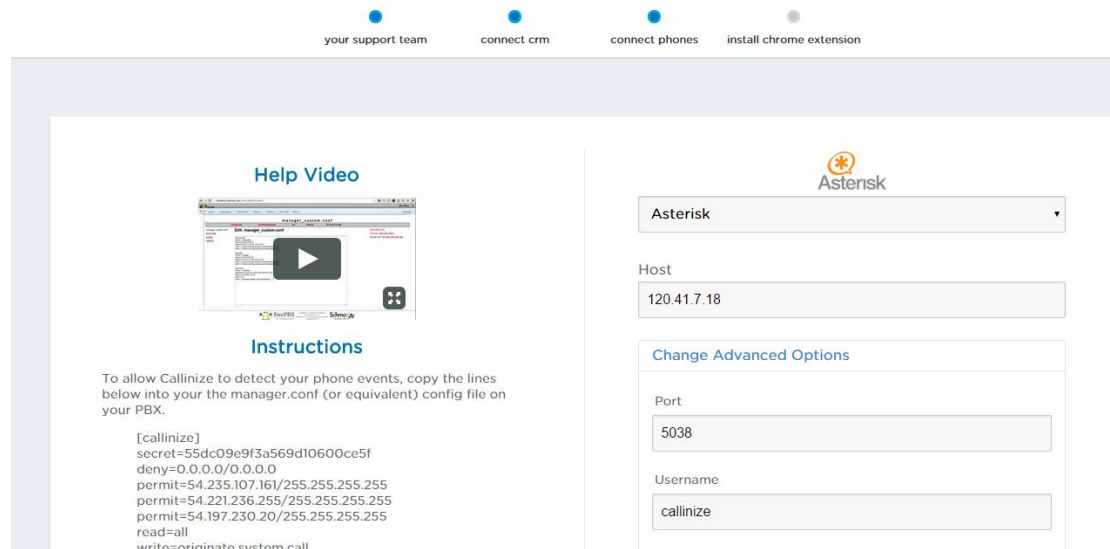


Figure 2-3 Connect MyPBX with Callinize

2.4 Install Callinize extension

After connecting phones it will goes to install Callinize extension page automatically. When you click the install button it is a popup click add button then it will display success connected.

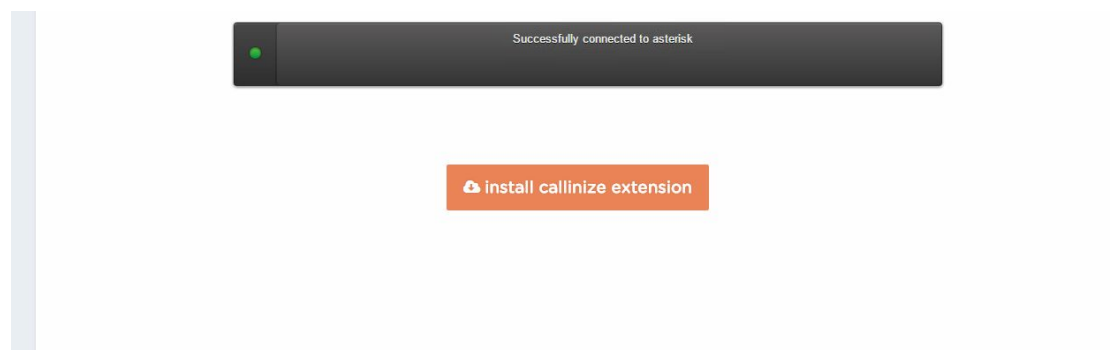


Figure 2-4 Install Callinize Extension

If it is doesn't work when you click the install button, you can install it here <https://chrome.google.com/webstore/detail/callinize/ibgkfepjabgnmpjojcncbcjfggeoklfdk?hl=en>

3 Configuring Callinize

The Users Panel is where you connect a registered phone of MyPBX and CRM user with each Callinize user. To assign a phone extension to a Callinize user, either use the big orange Assign button or use the dropdown list shown when you click the plus sign next to the user. You can assign multiple extensions to the same user and the same extension to multiple users.

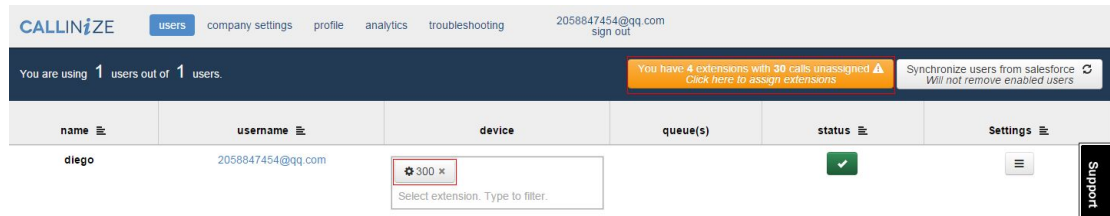



Figure 3-1 Linking a CRM User with a Phone Extension

With an Asterisk based system, to get your click-to-dial to work, you need to have the correct context set. This is configured by the admin user in the Callinize dashboard under Company Settings --> Phone->Click change advanced options and in the context column input the extension 300's dial plan "DLPN_DialPlan300".



Instructions

To allow Callinize to detect your phone events, copy the lines below into your the manager.conf (or equivalent) config file on your PBX.

```
[callinize]
secret=55cb00cf97d044312800af54
deny=0.0.0.0/0.0.0.0
permit=54.235.107.161/255.255.255.255
permit=54.221.236.255/255.255.255.255
permit=54.197.230.20/255.255.255.255
read=all
write=originate,system.call
```

You can set a different username and secret using the advanced settings to the right. If click to dial doesn't work, you may need to set a [custom context](#).

120.41.7.18

Change Advanced Options

Port

Username

Secret

Click to dial outbound channel

Context

Figure 3-2 Set context for Callinize

For some Phone Systems, "Advanced Settings" allow you to set a dial out prefix. If your phone system requires you to dial 9 to get an external line, you would indicate that in this area. If you do not enter the dial out prefix information, the "Click to Dial" feature will not work properly.

Instructions

To allow Callinize to detect your phone events, copy the lines below into your the manager.conf (or equivalent) config file on your PBX.

```
[callinize]
secret=55cb00cf97d044312800af54
deny=0.0.0.0/0.0.0.0
permit=54.235.107.161/255.255.255.255
permit=54.221.236.255/255.255.255.255
permit=54.197.230.20/255.255.255.255
read=all
write=originate,system,call
```

You can set a different username and secret using the advanced settings to the right. If click to dial doesn't work, you may need to set a [custom context](#).

Change Advanced Options

Port

Username

Secret

Click to dial outbound channel

Context

Dial out prefix


Figure 3-3 Set a Dial Out Prefix

4 Configuring MyPBX

4.1 Copy the Configuration File in Callinize

Please copy the file marked in the lower-left corner.

[Help Video](#)




Instructions

To allow Callinize to detect your phone events, copy the lines below into your the manager.conf (or equivalent) config file on your PBX.

```
[callinize]
secret=55dc09e9f3a569d10600ce5f
deny=0.0.0.0/0.0.0.0
permit=54.235.107.161/255.255.255.255
permit=54.221.236.255/255.255.255.255
permit=54.197.230.20/255.255.255.255
read=all
write=originate,system,call
```

You can set a different username and secret using the advanced settings to the right. If click to dial doesn't work, you may need to set a [custom context](#).

 Asterisk





Asterisk ▼

Host

[Change Advanced Options](#)

[Click to Dial Settings](#)

Click to Dial Country Codes

 US ×
 GB ×
 IR ×
 AU ×

US, GB, AU, DE

Figure 4-1 Copy the config File

4.2 Input the File in MyPBX via SSH

Type the command “`vi /persistent/custom-cfg/manager_custom.conf`” then hit letter “i” and paste the information in it via right click the mouse. Then type command “`:wq`” to save the changes.

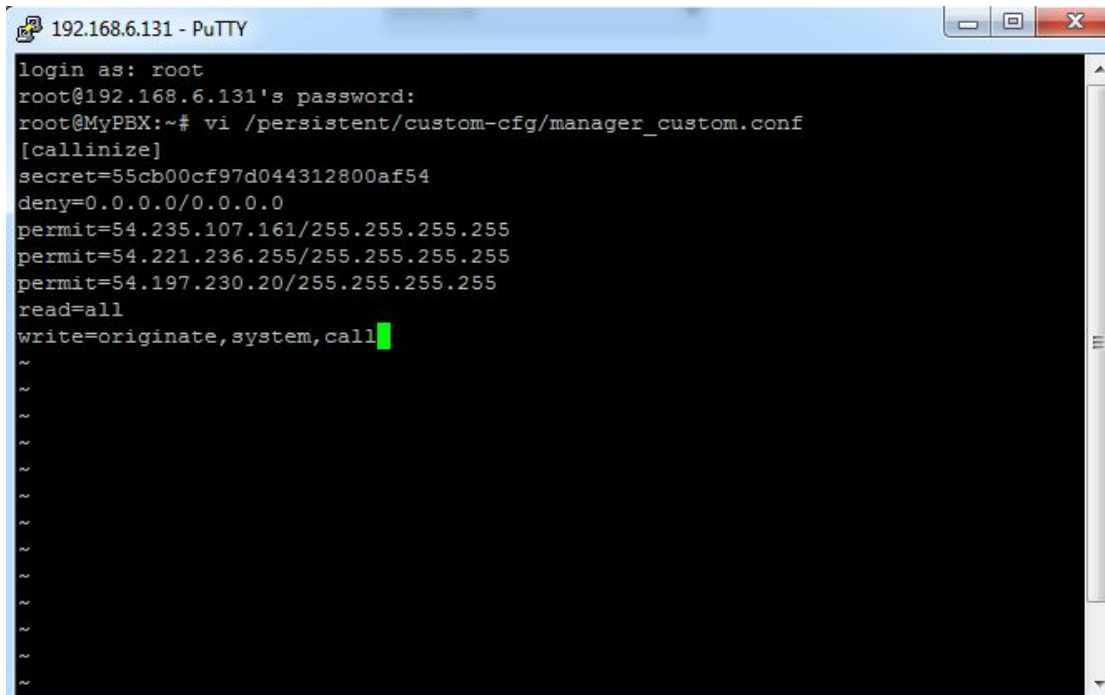


Figure 4-2 Input the config File in MyPBX

Note: please make sure the firewall will allow the IP address 54.235.107.161, 54.221.236.255 and 54.197.230.20 to connect to port 5038. It means you have to make sure the firewall in the router allow the above IP addresses and map port 5038. To get more detailed information, you can watch the help video.

5 Handing Calls on Salesforce CRM

5.1 Click to Call

Go to the page sales->contact. Select one contact and click the phone number.

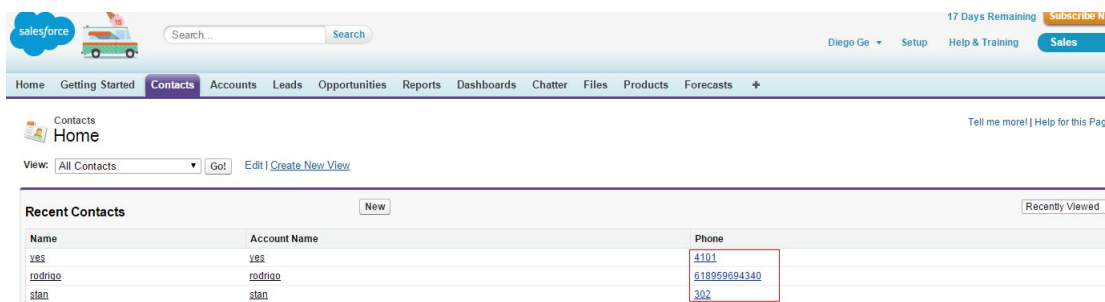


Figure 5-1 Click to Call

The screenshot shows the CALLINIZE dashboard. At the top, there are navigation links: users, company settings, profile, analytics, troubleshooting, and a user profile for 2058847454@qq.com. A yellow banner indicates 'Your Trial is almost up (1 days remain)! - Upgrade Today'. Below this, a status bar shows 'You are using 1 users out of 1 users.' and 'You have 2 extensions with 74 calls unassigned'. A table lists users with columns: name, username, device, queue(s), status, and Settings. The user 'diego' is listed with username '2058847454@qq.com'. A dropdown menu is open under the 'device' column, showing '300' and a prompt 'Select extension. Type to filter.'

name	username	device	queue(s)	status	Settings
diego	2058847454@qq.com	300		✓	

To make an outgoing call, please click the phone number (the phone number should add prefix match the outbound dial pattern in MyPBX). Your phone which is selected in device extension 300 will ring first. Pick up your phone, then a call to the contact will be established.

5.2 Inbound and Outbound Call Pop Up

The Call Popup window is part of the Chrome Extension. When an incoming or outgoing call is detected by the system, this popup appears in the bottom right corner of every open Chrome tab.

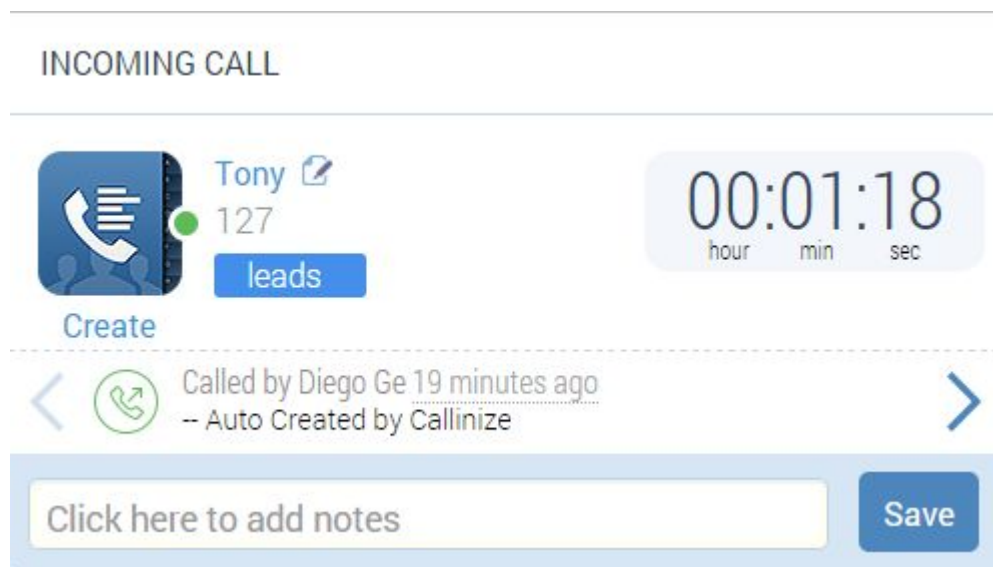


Figure 5-2 Incoming Call Pop Up

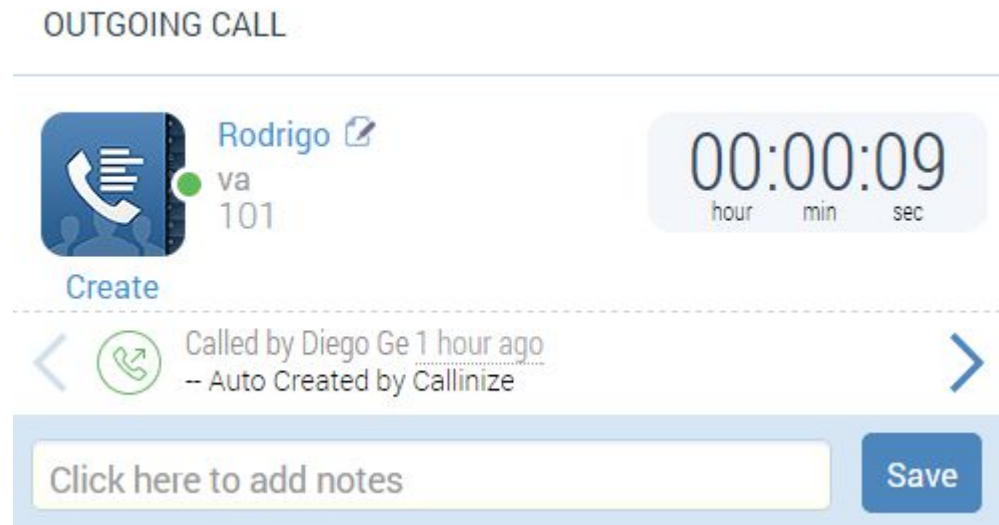


Figure 5-2-1 Outgoing Call Pop Up

5.3 Take a Note during the Call

Add call notes: use the notes box to save information about your current call. You can create follow-up tasks and send call notes to colleagues. Keep in mind that these notes can be seen by anyone else that dials this lead at your organization. Click on the arrows shown below to scroll through previous notes and activities saved for this contact.

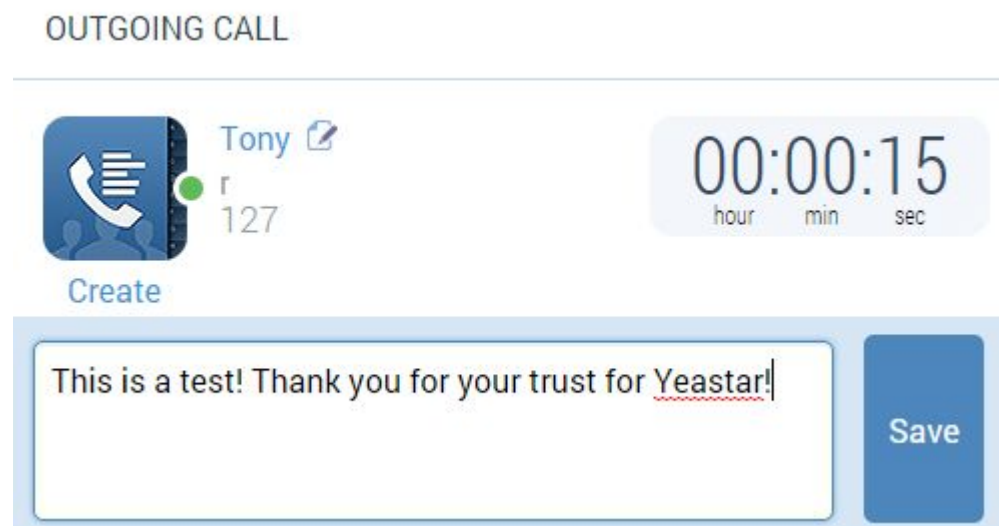


Figure 5-3 Take a Note during a Call

Next time you dial this number again it will display the note.

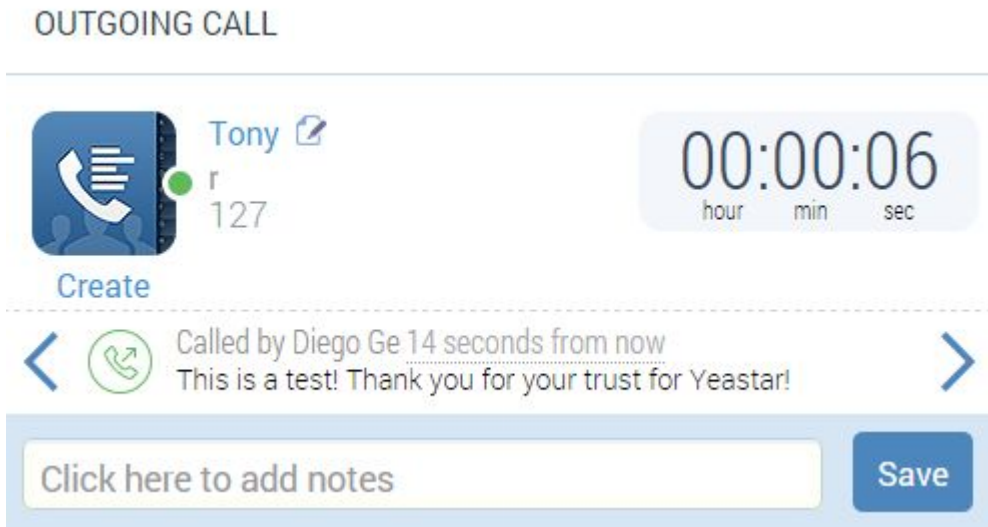


Figure 5-3-1 Read the Note before Making a Call

[The End]