



Guide for configuring the integration of Bitrix24 and the Yeastar P-series IP PBX

Instruction version 1.0 as of 09/16/2022

Integration allows you to:

1. Use smart routing functionality (incoming call will be automatically directed to the employee assigned to this client in CRM)
2. Use the Bitrix24 CallTracking functionality (the name of the line is transmitted during an incoming call)
3. Reduce the time for outgoing calls: optionally, for each internal number, you can enable automatic pick-up when calling from CRM
4. Control the parameter for creating leads by new numbers

To configure integration, you need to have:

- **Cloud or box Bitrix24** of any edition
- A valid **SSL certificate** is required for a box Bitrix24

Important notes:

- The integration module supports **internal numbers up to 4 digits inclusive**
- The PBX must be configured to work with **international phone number format**

How integration works:

The application implements the connection of the Yeastar P-series IP PBX API with the Bitrix24 REST API, and also converts audio conversation recordings from wav format on the external server side (conversation recordings are created on the Yeastar IP PBX only in wav format) to mp3 format (Bitrix24 accepts conversation recordings only in mp3 format). This implementation allows you to remove a significant load from the IP PBX processor.

PLEASE NOTE that voice SIP traffic does not go anywhere beyond your PBX. In Bitrix24, it transmits only the following: a REST API request to raise a call card, a phone number and a conversation recording.

CONTENTS

| | |
|--|----------|
| 1. Configuration of the Yeastar P-series IP PBX | 3 |
| 1.1 Enabling the API | 3 |
| 1.2 Connection security | 4 |
| 1.3 Enabling the API Monitor | 4 |
| 2. Configuration of Bitrix24 | 6 |
| 2.1 The module installation | 6 |
| 2.2 Configuration of the outgoing line in Bitrix24 | 6 |
| 2.3 Configuration of internal users numbers | 8 |
| 3. Configuration of the integration module | 9 |
| 3.1 Basic Settings | 9 |
| 3.2 Users | 11 |
| 3.3 Configuring the processing of incoming lines | 11 |
| 3.4 Working time settings | 12 |
| 3.5 Technical support | 13 |
| 3.6 Payment for the application | 13 |

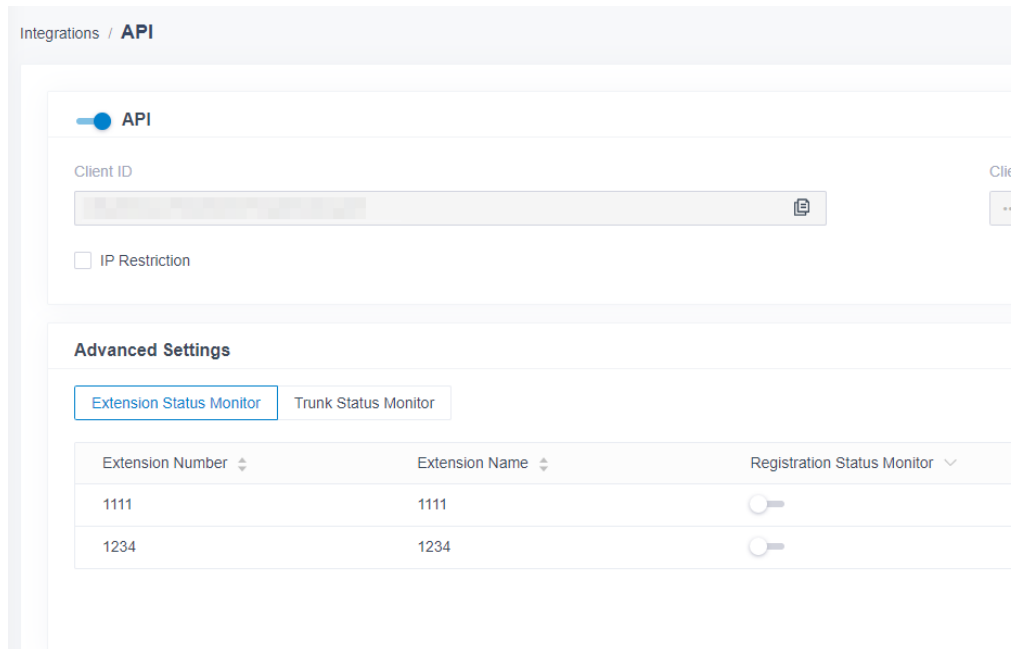
1. Configuration of the Yeastar P-series IP PBX

1.1 Enabling the API

To enable the API, open the Yeastar P-series PBX administration interface and go to the **Integrations** section on the **API** tab:

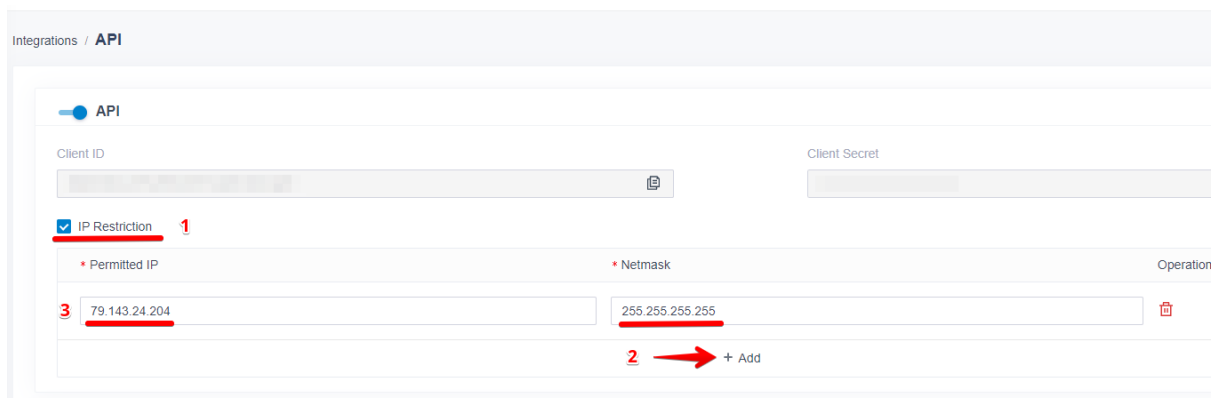
The screenshot displays the Yeastar PBX administration interface. On the left is a navigation sidebar with the Yeastar logo at the top. Below the logo, the sidebar contains a list of menu items: Dashboard, Extension and Trunk, Contacts, Auto Provisioning, Call Control, Call Features, PBX Settings, System, Security, Maintenance, Integrations, CRM, Speech to Text, AMI, API, and Database Grant. The 'Integrations' menu item is highlighted with a red underline, and a red arrow points to the 'API' sub-item. The main content area on the right shows a 'Dashboard' with a 'Active Calls' widget displaying '0/10' and a line graph. Below that is a 'Registered Extensions' widget showing '1/2' with a circular progress indicator. At the bottom, an 'Event Trend' widget shows a count of '12'.

Enable the API by moving the checkbox next to the corresponding item in the interface. The data specified in the **Client ID** and **Client Secret** fields are the login and password for API connection and will be required when configuring the application in Bitrix24



1.2 Connection security

After enabling the API interface, the settings will become available. For security reasons, we recommend restricting API access by specifying which hosts can use it. For this, enable the **IP Restriction** option and specify the integration application server address in the permitted list: **79.143.24.204** with a mask of 255.255.255.255



1.3 Enabling the API monitor

For the API to work, enable the monitor for internal numbers and trunks by following these steps:

On the **Extension Status Monitor** tab, enable monitoring for internal employee numbers that need to be integrated with Bitrix24

Advanced Settings

Extension Status Monitor Trunk Status Monitor

| Extension Number | Extension Name | Registration Status Monitor | Call Status Monitor | Presence Status Monitor |
|------------------|----------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 1111 | 1111 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1234 | 1234 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Total :2 < 1 > 20 / page

After enabling monitoring of internal numbers, go to the **Trunk Status Monitor** tab and enable monitoring for lines that need to be integrated with Bitrix24.

Confirm the changes by clicking **Save**

Integrations / API

API

Client ID Client Secret

IP Restriction

| * Permitted IP | * Netmask | Operations |
|--|--|----------------------------------|
| <input type="text" value="79.143.24.204"/> | <input type="text" value="255.255.255.255"/> | <input type="button" value="🗑"/> |
| + Add | | |

Advanced Settings

Extension Status Monitor Trunk Status Monitor

| Extension Number | Extension Name | Registration Status Monitor | Call Status Monitor | Presence Status Monitor |
|------------------|----------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 1111 | 1111 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 1234 | 1234 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Total :2 < 1 > 20 / page

2. Configuration of Bitrix24

2.1 The module installation

The module is installed from the Bitrix24 application catalog

<https://www.bitrix24.com/apps/app/atevi.yeastarp/>

After installation, the module can be tested for free for 30 days.

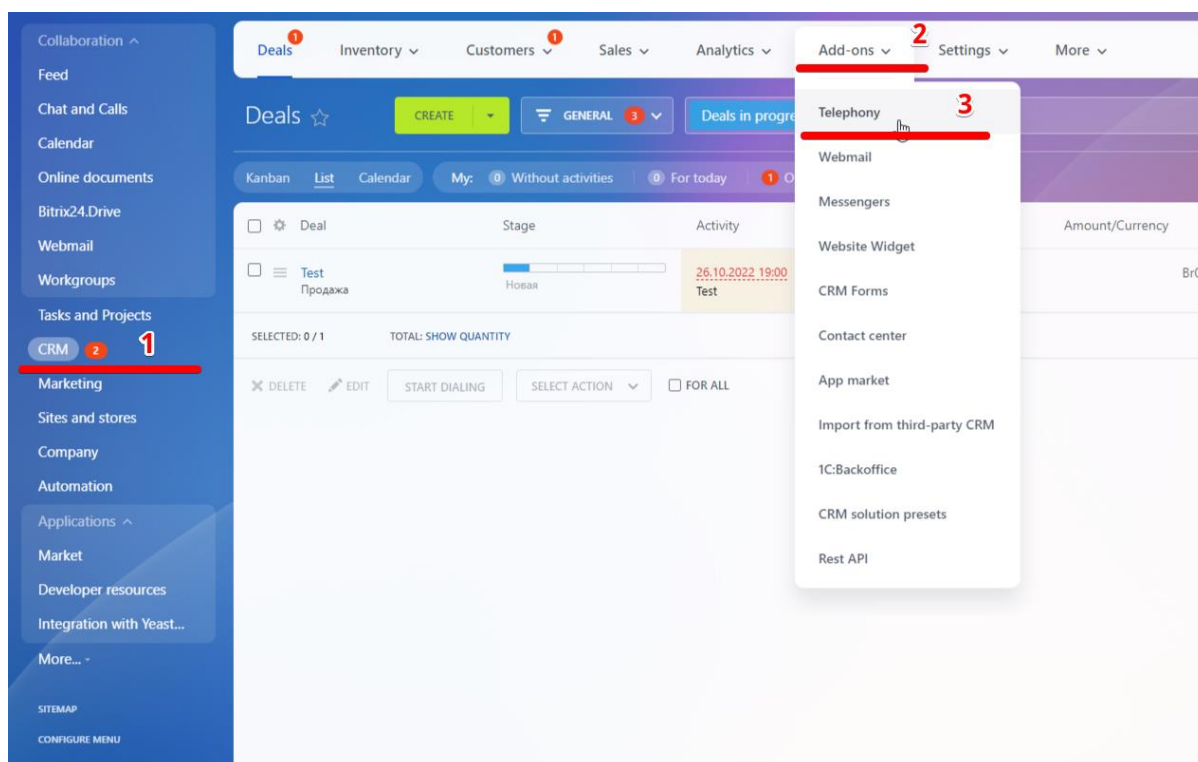
Payment for the application is made through the services <https://my.atevi.by/en/>.

If no payment is made through the services after 30 days, the module will be completely blocked.

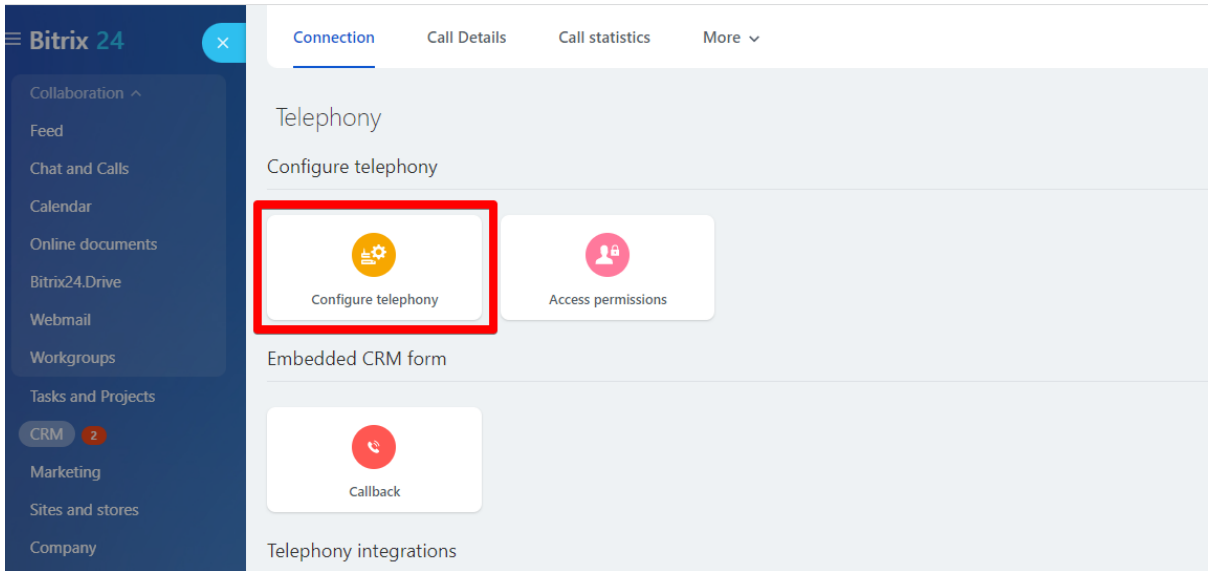
2.2 Configuration of the outgoing line in Bitrix24

For outgoing calls from your Bitrix24, after installing the application, go to the Bitrix24 telephony settings and select the application "Integration with Yeastar P-series" as the main direction for outgoing calls.

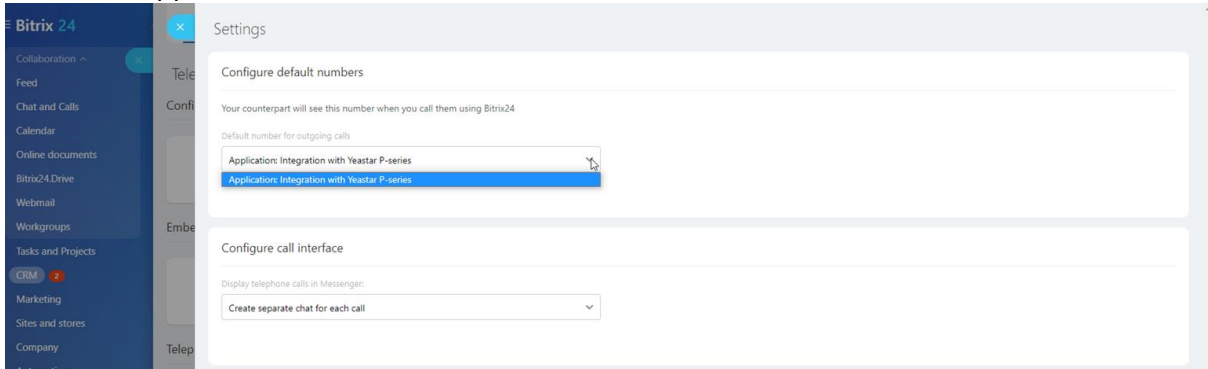
CRM->Integrations->Telephony



Telephony configuration



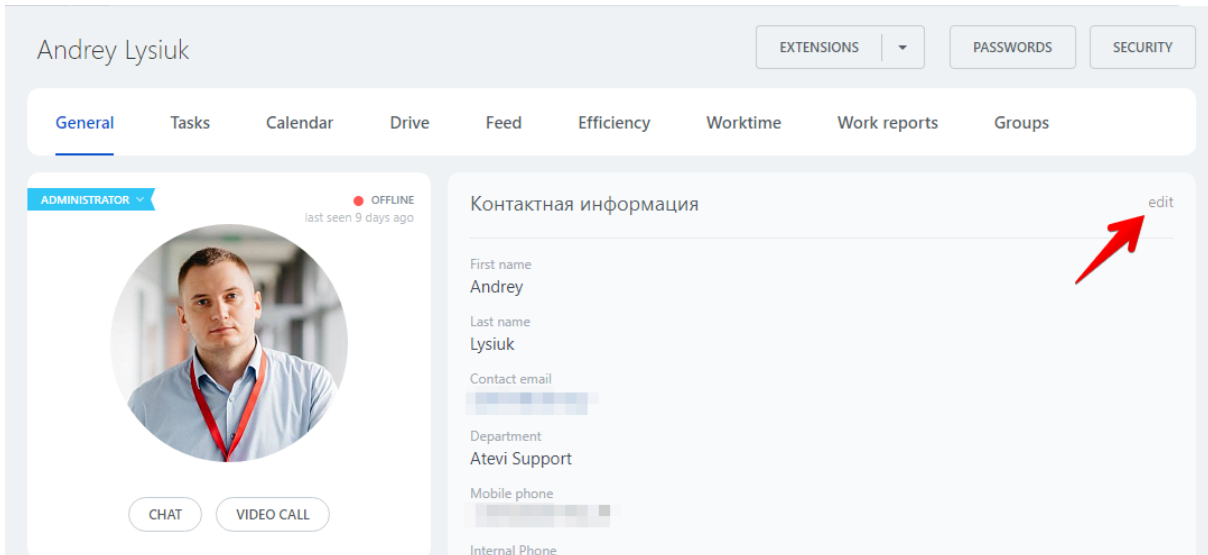
Select the application:



2.3 Configuration of internal users numbers

The next step in configuration is to specify in the **profile of each employee in your Bitrix24 who will use telephony**, their personal internal number on your IP PBX.

Open the employee profile, and in the "Contact information" section, click "Edit"



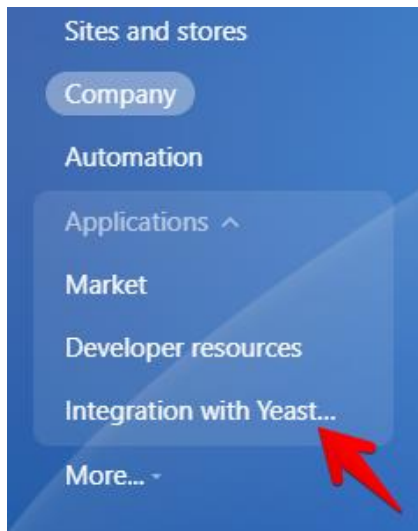
Find the "Internal phone" field and enter the employee's internal number and click "Save"



Do the same for each employee in your Bitrix24 who will use telephony and CRM Bitrix24.

3. Configuration of the integration module

To configure the integration application, find the "Integration with Yeastar P-series" item in the left menu of your Bitrix24 in the "Applications" section.



In the "Integration with Yeastar P-series" application, go to the "Settings" tab and fill in the settings blocks described below.

3.1 Basic settings

At the first launch of the application, only the basic settings block and the user settings block are available. To get the rest, a connection to the PBX is required.

The screenshot shows the settings page for 'Интеграция с Yeastar P-series'. The top navigation bar includes 'Marketplace', 'Installed', 'Developer resources', 'Интеграция с Yeastar P-series', and 'More ^'. Below the navigation bar, there are tabs for 'DESCRIPTION', 'SETTINGS', 'STATISTICS', 'SUPPORT', and 'DEVELOPER'. The 'SETTINGS' tab is active.

Main

Application IP address: 79.143.24.204

PBX address:

API login:

API password:

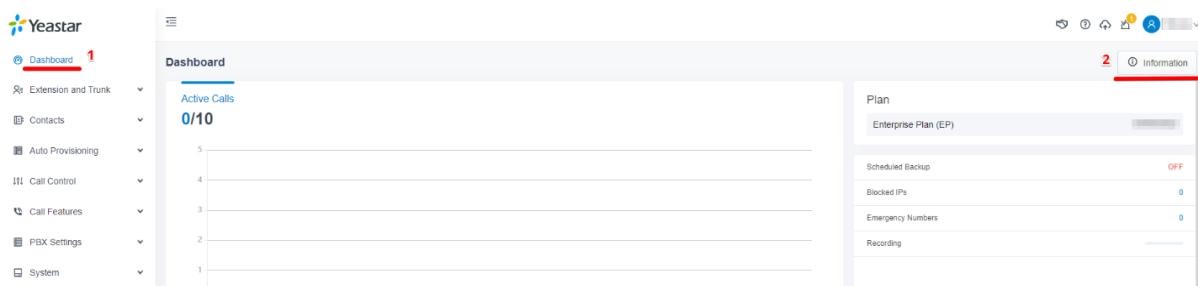
PBX serial number:

Users

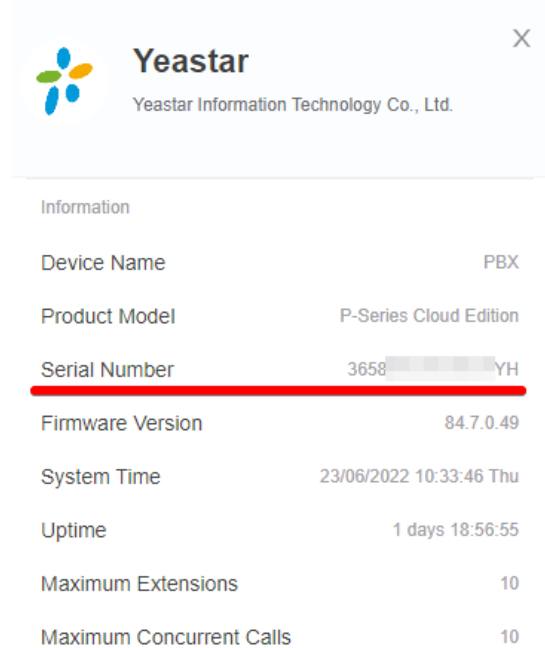
| | Employee | Create a lead for an unknown number | Automatic call answer |
|---|-------------------------------|-------------------------------------|--------------------------|
| 1 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | <input type="text" value=""/> | <input type="checkbox"/> | <input type="checkbox"/> |

- **Application IP address:** this field contains the address of the application server to add to the API access permissions.
- **PBX address:** the address of your PBX.
- **API login:** Client ID from the PBX API settings (see clause 1.1)
- **API password:** Client Secret from the PBX API settings (see clause 1.1)
- **PBX serial number:** the serial number of your PBX is necessary for security, as an additional tool of control.

To find the serial number of the PBX, go to the **Dashboard** tab in the administration interface and click on the **Information** button.



After clicking, a slider will open with information about the PBX, copy the serial number.



See below the correct example of the basic settings block:

Main

Application IP address: 79.143.24.204

PBX address: sw[redacted]rcloud.com

API login: dB[redacted]g8E

API password: [redacted]

PBX serial number: 36[redacted]H

3.2 Users

In this section, you can select and configure for those employees who will use the telephony integration. Please note, the integration will only work for the specified numbers.

- **Employee:** the user of your Bitrix24 for whom integration is enabled.
- **Create a Lead** for an unknown number: if the box is not checked, leads for this number will not be created.
- **Automatic call answering:** this checkbox enables or disables the mechanism of automatic call answering when an outgoing call is made.

The standard version of the application allows you to integrate up to 30 internal numbers.

See below the example of a filled section:

Users

| | Employee | Create a lead for an unknown number | Automatic call answer |
|---|-------------------------|-------------------------------------|-------------------------------------|
| 1 | [1234] Aliaksandr Misko | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 2 | [1235] Integrator | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 3 | [redacted] | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | [redacted] | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 | [redacted] | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | [redacted] | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | [redacted] | <input type="checkbox"/> | <input type="checkbox"/> |

3.3 Configuration of the processing of incoming lines

In this section, all active incoming lines that are on the PBX are displayed for configuration.

Trunks

| Trunk activity | Trunk name | Transfer to the appropriate employee | Appropriate | Adapt Caller ID | | |
|-------------------------------------|-------------|--------------------------------------|-------------------------|----------------------|----------------------|----------------------|
| <input checked="" type="checkbox"/> | 74993808954 | <input type="checkbox"/> | [1234] Aliaksandr Misko | Template | Delete | Add |
| | | | | <input type="text"/> | <input type="text"/> | <input type="text"/> |

[Add a rule](#) x

- **Trunk Activity:** the option enables or disables trunk integration with your Bitrix24.
- **Transfer to the appropriate employee:** the option enables the transfer of the call to the appropriate employee if the caller's number is associated with any entity in the CRM/
- **Appropriate:**the user responsible for the new lead calling from an unknown number.
- **Adapt Caller ID:** the block of incoming number conversion settings. There are cases when incoming numbers are not transmitted in an international format, for example 8029 instead of +37529. Adapt Caller ID allows you to convert a number. The configuration is performed similarly to the PBX settings. For details visit: https://help.yeastar.com/en/s-series/topic/adapt_caller_id.html

3.4 Working time settings

The working time settings block. Calls received during working hours will be forwarded to the IVR or the group for working hours. Similarly, routing will be performed for non-working hours.

Working Hours Settings

Time zone

Start and end of working hours

Start and end of the break

Working days Monday Tuesday Wednesday Thursday Friday Saturday Sunday

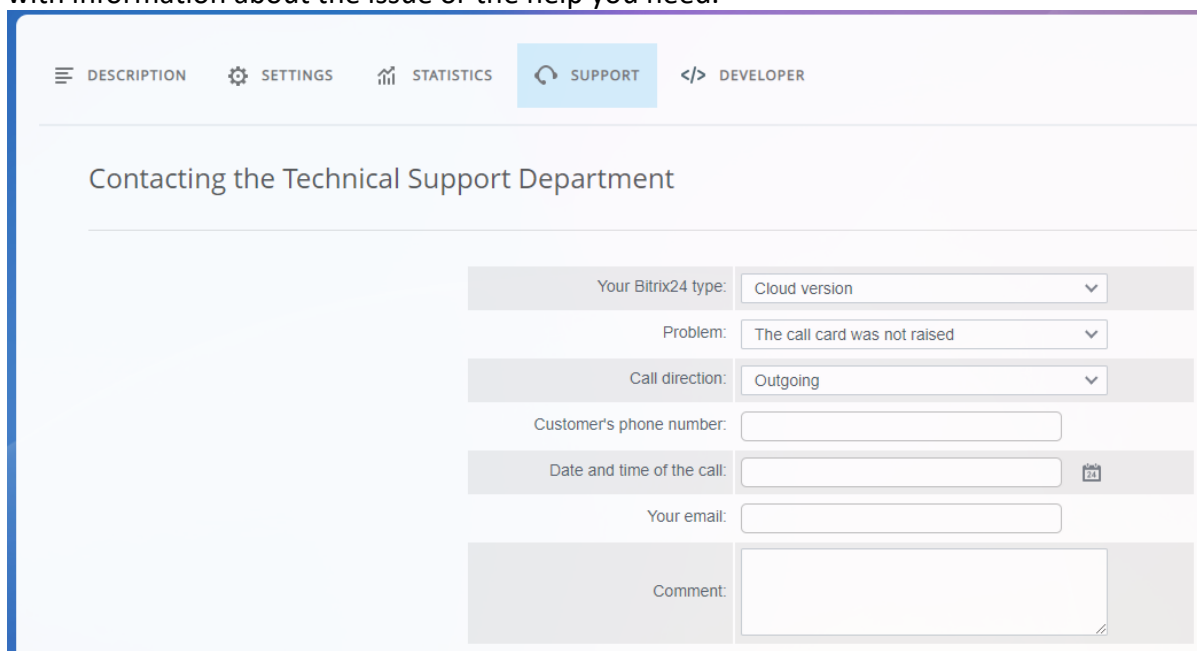
Additional working days
enter comma-separated values in the format day.month,
for example: 01.02,14.05,22.12

Additional days off
enter comma-separated values in the format day.month,
for example: 01.02,14.05,22.12

- **Time zone:** your time zone, for the correct working time settings.
- **Start and end of working hours:** the start and end time of the working day.
- **Start and end of the break:** the time of the start and end of the break during the working day.
- **Working days:** check the days that are considered working days.
- **Additional working days:** this option allows you to specify additional working days in case of postponements.
- **Additional days off:** this option allows you to specify additional days off in case of postponements.

3.5 Technical support

To get technical support for the module, or help with configuration, find the "Applications" item in the left menu of your Bitrix24 and click "Integration with Yeastar P-series". On the opening page, go to the "Technical Support" section in the top menu and fill in the fields with information about the issue or the help you need.



The screenshot shows a web interface for contacting technical support. At the top, there is a navigation bar with tabs: DESCRIPTION, SETTINGS, STATISTICS, SUPPORT (highlighted), and DEVELOPER. Below the navigation bar, the title 'Contacting the Technical Support Department' is displayed. The form consists of several fields:

- 'Your Bitrix24 type:' with a dropdown menu showing 'Cloud version'.
- 'Problem:' with a dropdown menu showing 'The call card was not raised'.
- 'Call direction:' with a dropdown menu showing 'Outgoing'.
- 'Customer's phone number:' with a text input field.
- 'Date and time of the call:' with a text input field and a calendar icon.
- 'Your email:' with a text input field.
- 'Comment:' with a large text area for entering details.

Please note that you can make a request for technical support only through the form in the "Tech. support" in the app. Support on the application configuration is not done on the phone.

Answers to the most frequently asked questions about setting up and working with the application can be found at this link <https://atevi.by/help/faq/>

3.6 Payment for the application

All summary information about the type of your license, its validity period and the history of renewals can be found in the application in the "Payment" tab.

In Belarus, payment is accepted through our online service <https://my.atevi.by/en/> based on a public offer. The exchange of closing documents is done via the email specified when placing the order.