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User Guide Portal Mangement Zoho – Digital Centrex



Gateway Centrex Conecta Zoho

Orange

Project: SAT20203770

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orange™

SATEC. Sistemas Avanzados de Tecnología SA

Company certified according to the standards ISO 9001: 2008, ISO 14001: 2004, ISO / IEC 20000: 2011 and ISO / IEC 27001: 2013 according to the scopes included in the respective certificates

Change Log

Version	Date	Reviewer	Summary of the changes produced
1.0	05/14/2021	Satec SA	Initial release.

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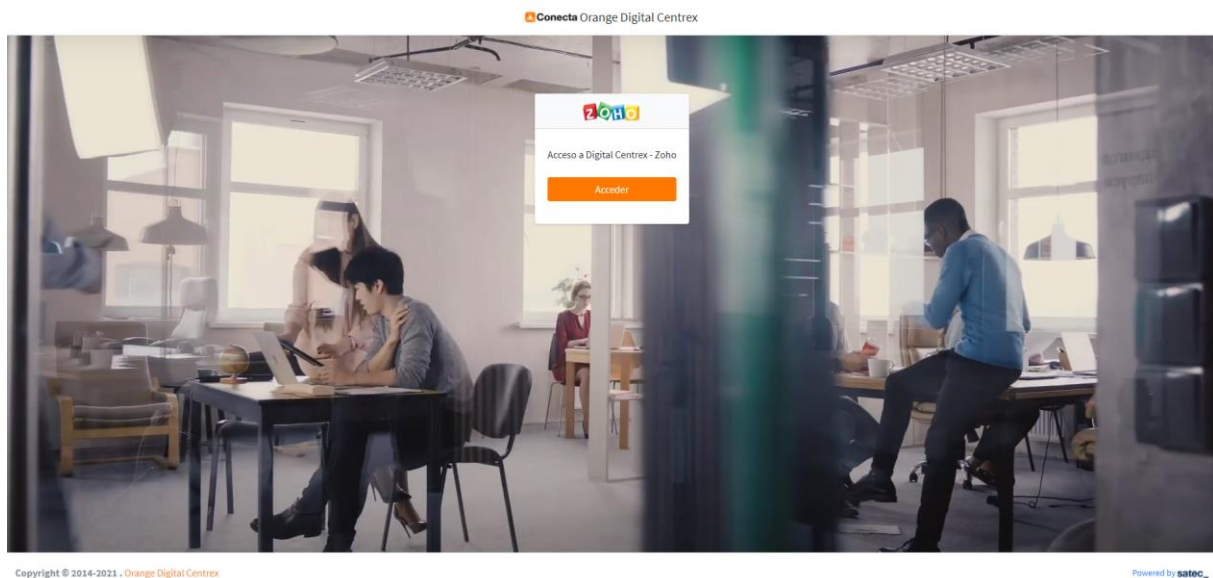
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1_ Introduction

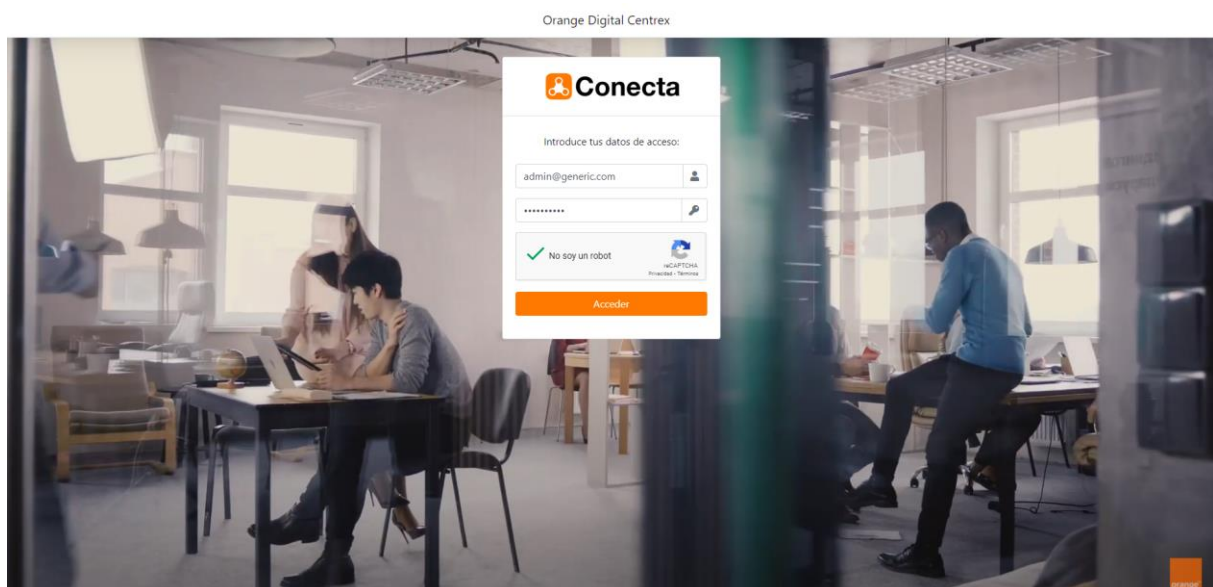
This document corresponds to the user guide for the User Administration web portal of the Zoho system and the Orange Conecta users (Digital Centrex SoftPhone).

2_ Portal access

Access to the portal is restricted to a single administrator user per company. After entering the access URL or clicking on the activation link in Zoho, the following welcome screen will open.



We press the button [], and it will redirect us to the Login screen.



We will enter the credentials, press the captcha, and if they are valid, we will access the main Zoho administration screen -Connect.

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3_ Enable Zoho PhoneBridge integration

After accessing the portal, the administrator user of the Orange client company will be able to press the menu

option, [ Integración Zoho], in order to enable Zoho's PhoneBridge if it is disabled.



After pressing the option, it will show us the following window:



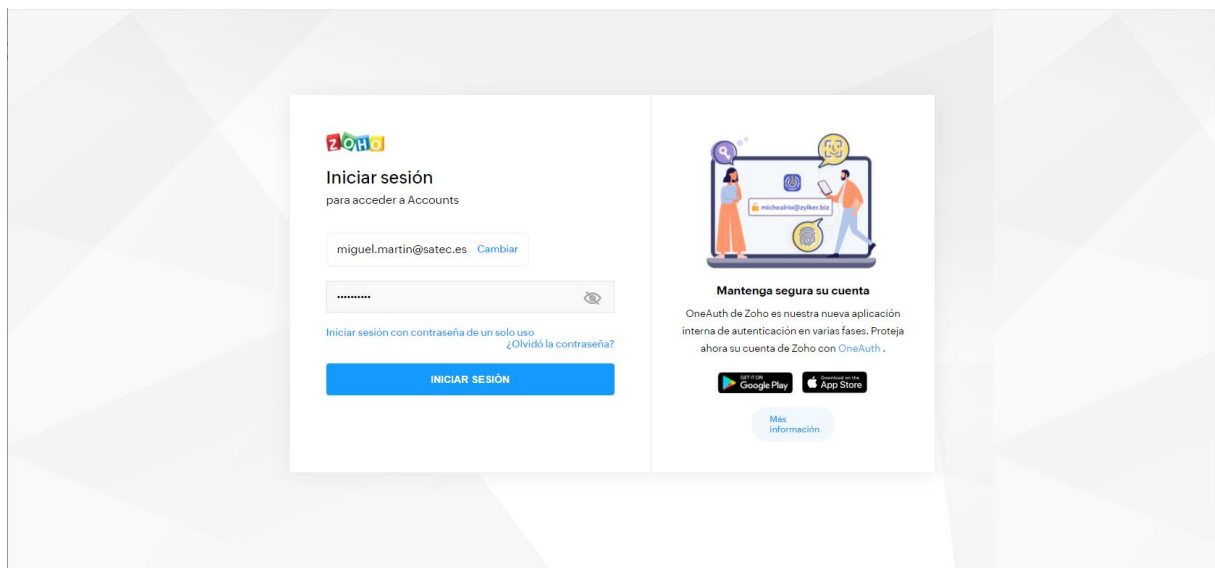
As the integration with Zoho is disabled, the portal will show us the option to enable it, as shown in the previous image.

Pressing the button , it will open a confirmation Popup window, requesting the Zoho account of the user with which it will be accessed later in the activation process within Zoho.

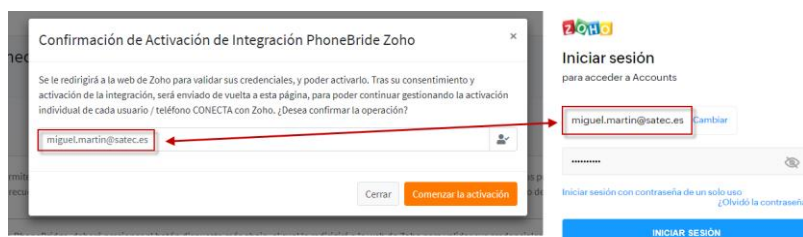


It is very important that the user who is filled in in this window is the same one with which he / she proceeds to identify himself in the Zoho application. If you type it wrong or do it with a different user, the integration activation process will end unsatisfactorily.

After pressing the **Comenzar la activación** button, we will be redirected to the Zoho website, where we will have to identify ourselves to proceed with the activation, as shown in the following image.

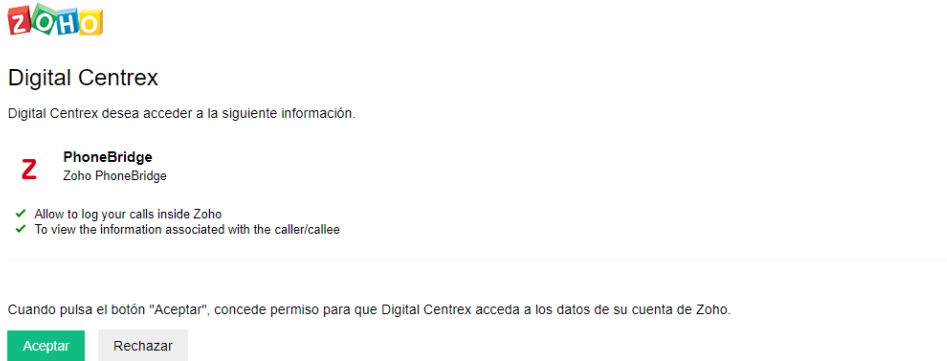


As you can see, we must identify ourselves in Zoho, with the same account that we had filled in in the confirmation window.



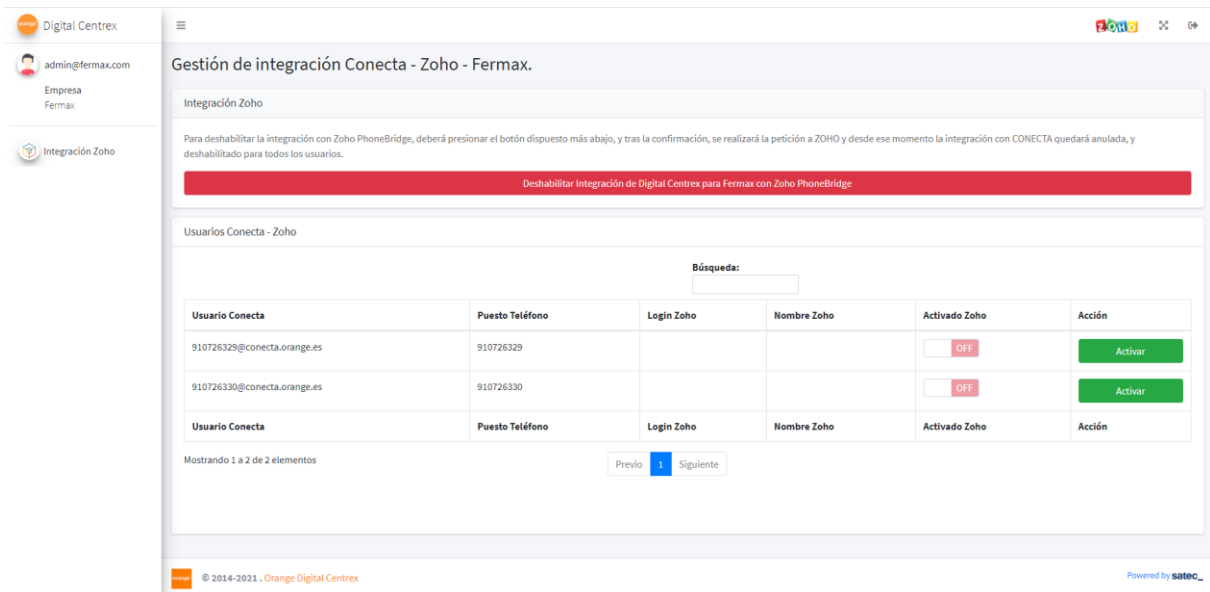
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After identifying ourselves, Zoho will show us the following window, so that the user gives their consent to activate Phonebridge with Digital Centrex.



Cuando pulsa el botón "Aceptar", concede permiso para que Digital Centrex acceda a los datos de su cuenta de Zoho.

Pressing button [**Aceptar**], after which it will redirect us to the Administration Web again, where if the operation had been processed satisfactorily, the following window will appear, to be able to manage from now on the phone links with Zoho users, as shown then.



4_ Activation / Deactivation of zoho users with connect seats

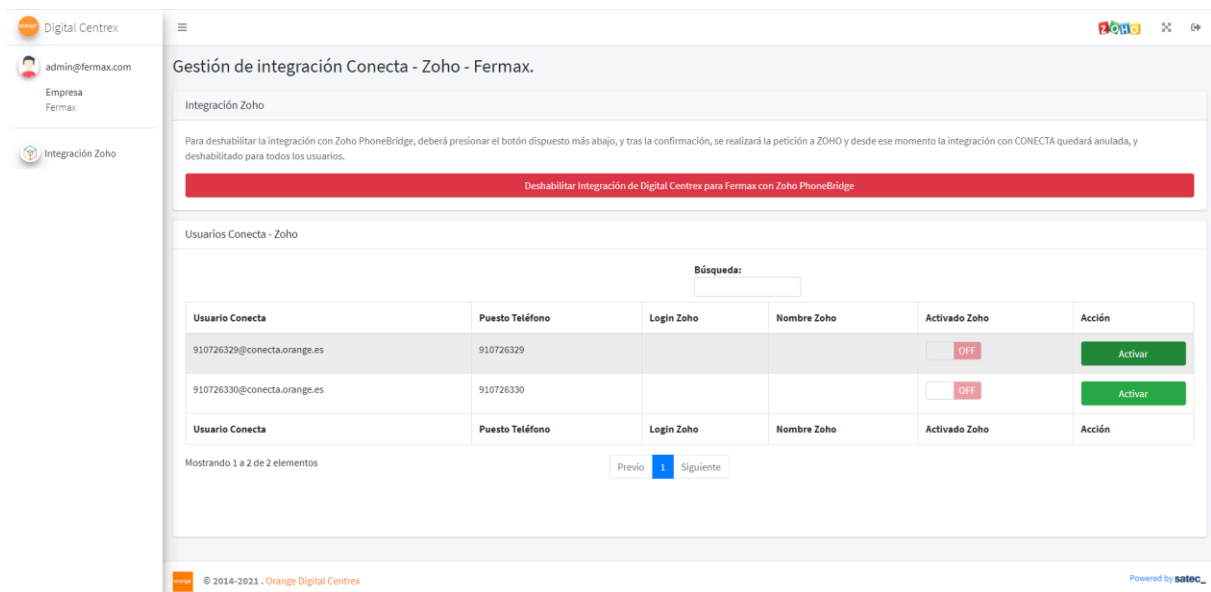
Once the integration with Zoho's PhoneBridge has been enabled, we will be able to manage the links between the CONECTA users and Zoho users, to in turn activate the **ClickToDial** and CallControl **feature** in your system.

To do this, once the portal is accessed, the administrator user of the Orange client company will be able to press

the menu option, [ Integración Zoho], to manage activations or deactivations.



After pressing the option, it will show us the following window:



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As can be seen, the system will present us with a list of the Conecta Telephones that were within the company's plan.

Usuarios Conecta - Zoho

Búsqueda:

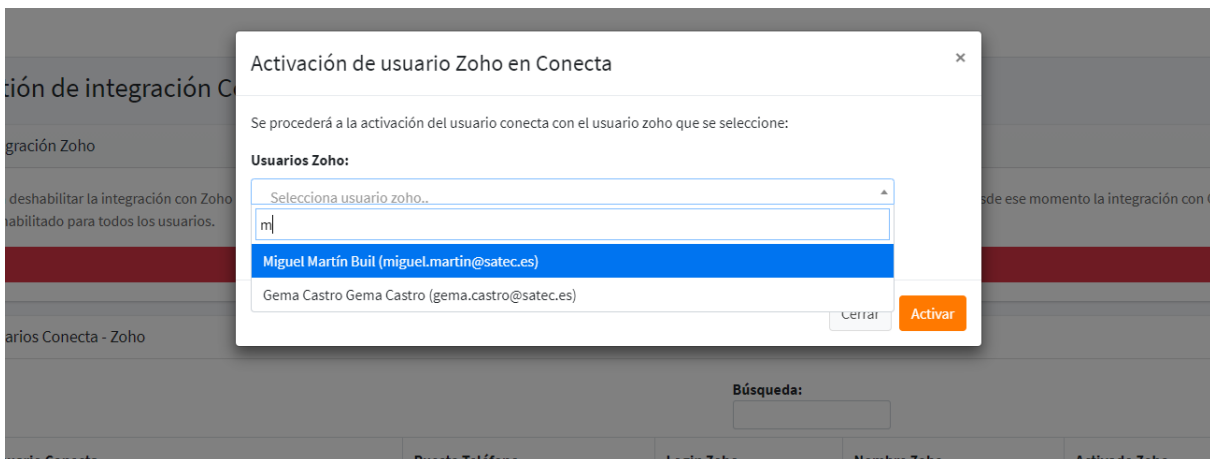
Usuario Conecta	Puesto Teléfono	Login Zoho	Nombre Zoho	Activado Zoho	Acción
910726329@conecta.orange.es	910726329			<input type="checkbox"/> OFF	<input type="button" value="Activar"/>
910726330@conecta.orange.es	910726330			<input type="checkbox"/> OFF	<input type="button" value="Activar"/>
Usuario Conecta	Puesto Teléfono	Login Zoho	Nombre Zoho	Activado Zoho	Acción

Mostrando 1 a 2 de 2 elementos

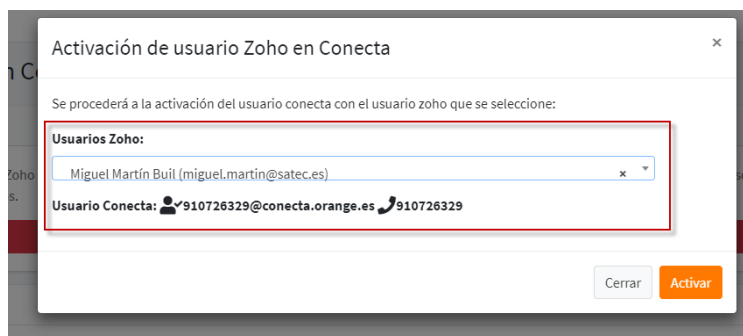
Previo **1** Siguiente

4.1. Activate

Those that were not linked or activated in Zoho, will appear with an OFF Status and with the green ACTIVATE button. If we wanted to activate and link them, we would press the [], and the following Popup window will open.



In the new pop-up sale, we will have a drop-down menu, where we can search and select the Zoho user to link to with Conecta user and the phone number, and in turn ClickToDial and CallControl will be activated. Once the user has been selected, we can press the [], to proceed with the operation.



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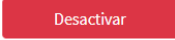
If the activation operation was successful, when we return to the list, the registry will have changed its state, and this time with the red Deactivate button.

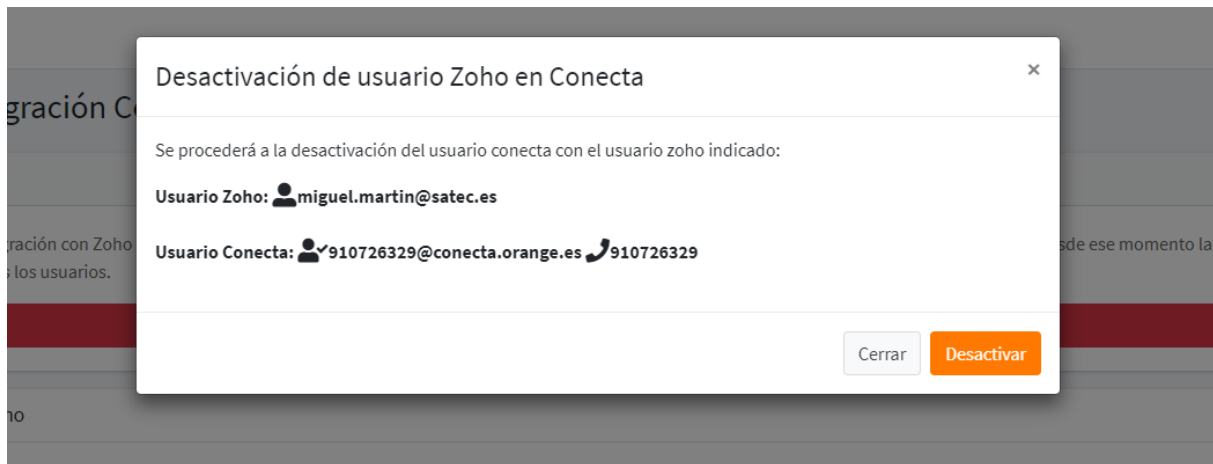
Usuario Conecta	Puesto Teléfono	Login Zoho	Nombre Zoho	Activado Zoho	Acción
910726329@conecta.orange.es	910726329	miguel.martin@satec.es	miguel.martin@satec.es	ON <input type="checkbox"/>	Desactivar
910726330@conecta.orange.es	910726330			OFF <input type="checkbox"/>	Activar
Usuario Conecta	Puesto Teléfono	Login Zoho	Nombre Zoho	Activado Zoho	Acción


After activation, we can enter the Zoho application, and in those parts of the application where a phone number appears, it will give us the option to launch the call.


By clicking on the icon , will launch the ClickToDial, and launch the call.

4.2. Deactivate

Those that were linked and activated in Zoho, will appear with a Status to ON and with the green DEACTIVATE button. If we wanted to deactivate and unlink them, we would press the [], and the following Popup window will open, where it will ask us for confirmation of the user and telephone number involved.

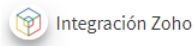


By pressing the [], the operation will proceed and if it were satisfactory, upon returning to the list, the record will have changed its status, and this time with the green Activate button, as shown in the image.

Usuario Conecta	Puesto Teléfono	Login Zoho	Nombre Zoho	Activado Zoho	Acción
910726329@conecta.orange.es	910726329			<input type="checkbox"/> OFF	
910726330@conecta.orange.es	910726330			<input type="checkbox"/> OFF	
Usuario Conecta	Puesto Teléfono	Login Zoho	Nombre Zoho	Activado Zoho	Acción

5_ Disable Zoho PhoneBridge integration

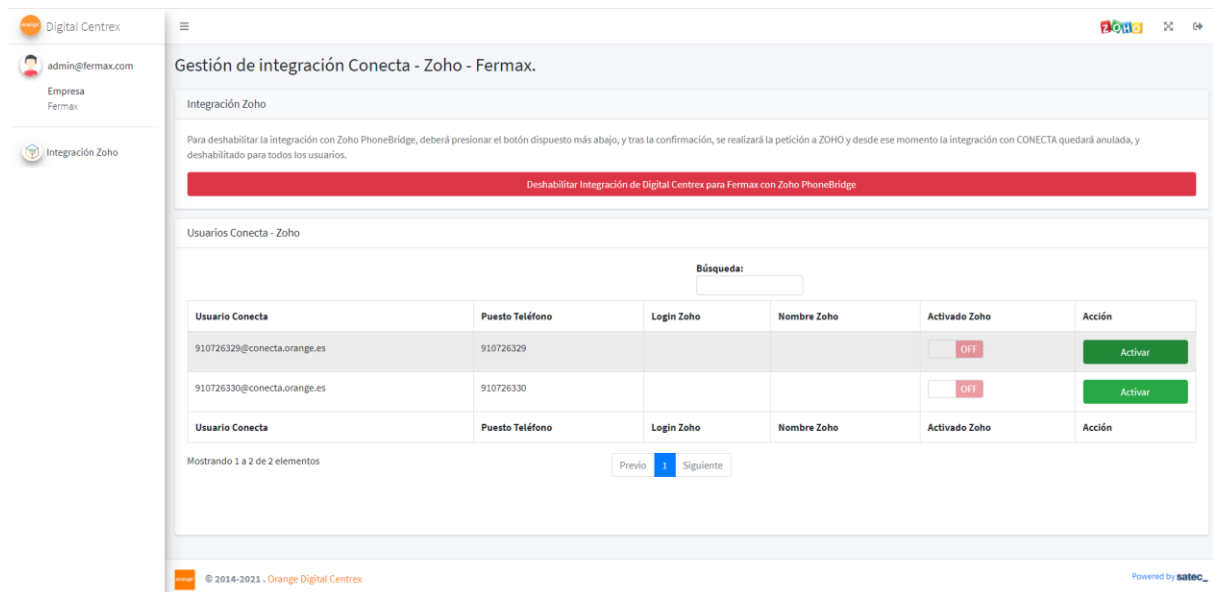
Once the portal is accessed, the administrator user of the Orange client company can press the menu option, [



], in order to disable Zoho PhoneBridge, if it was previously enabled.



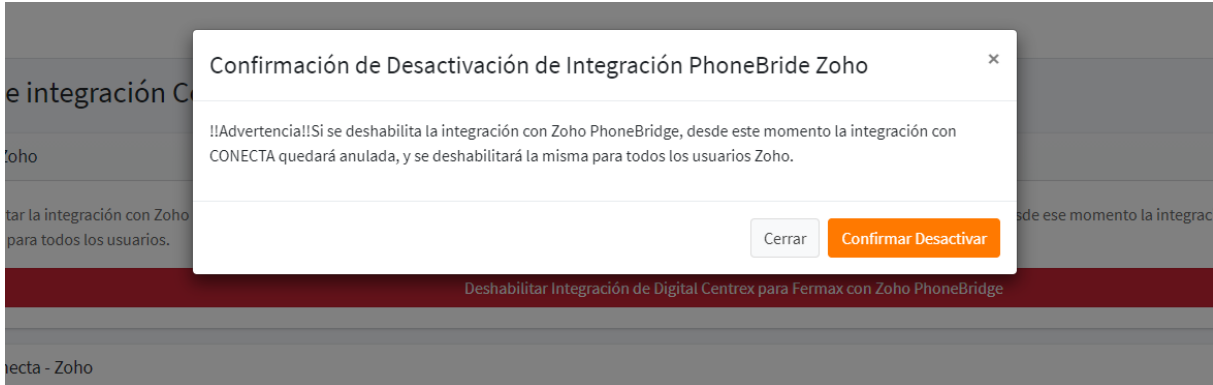
After pressing the option, it will show us the following window:



As the integration with Zoho is disabled, the portal will show us the option to disable it, as can be seen in the previous image.

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Pressing the button **Deshabilitar Integración de Digital Centrex para Fermax con Zoho PhoneBridge**, a confirmation Popup window will open for us to proceed with the deactivation.



After pressing the **Confirmar Desactivar**, we will proceed with the request to deactivate the integration with Zoho's PhoneBridge, and if this is satisfactory, we will be presented again with the screen to start the activation, as shown in the following window.

