

This document describes how to integrate Zoho CRM Service with Aeonix Unified Communication and Collaboration system.

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1 General

This guide goes through the necessary steps to integrate the Zoho CRM Service with Aeonix.

2 Aeonix Server Setup

Open the Aeonix Admin portal.

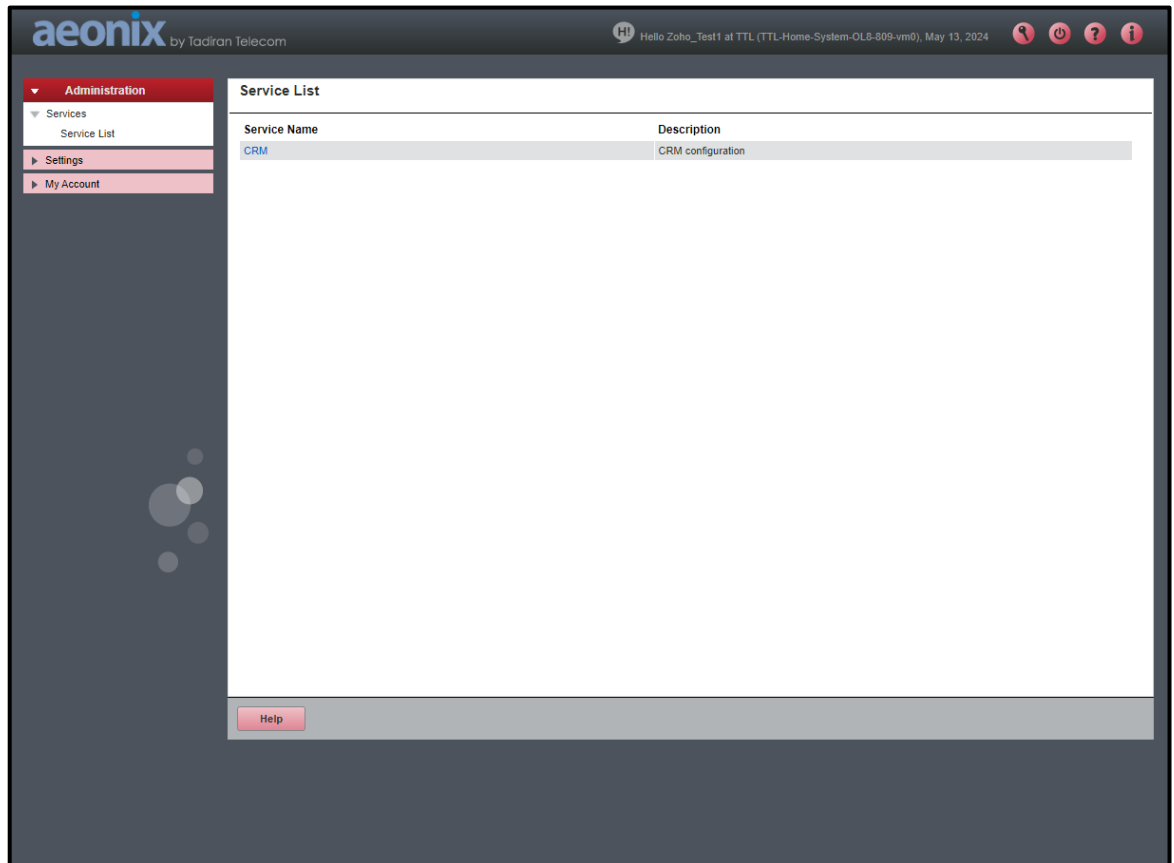
The image shows the Aeonix Admin portal login interface. At the top, the 'aeonix' logo is displayed in a light blue font, with a small blue dot above the 'i'. Below the logo, the text 'by Tadiran Telecom' is visible in a smaller, lighter font. The login form consists of four input fields: 'User', 'Password', 'Security code', and 'Language'. The 'Security code' field is a CAPTCHA field showing the code 'Fn6E' with a refresh icon to its right. The 'Language' field is a dropdown menu currently set to 'Use my default language'. A 'Login' button is located at the bottom right of the form area. The background is dark grey with some faint circular patterns on the right side.

Please use your Aeonix Administrator credentials to sign in

2.1 Create User's Zoho CRM Service

After logging in, navigate to **Administration->Services->Service List**. A list of services is displayed.

Click on **CRM** service to add the service to the logged-in user.

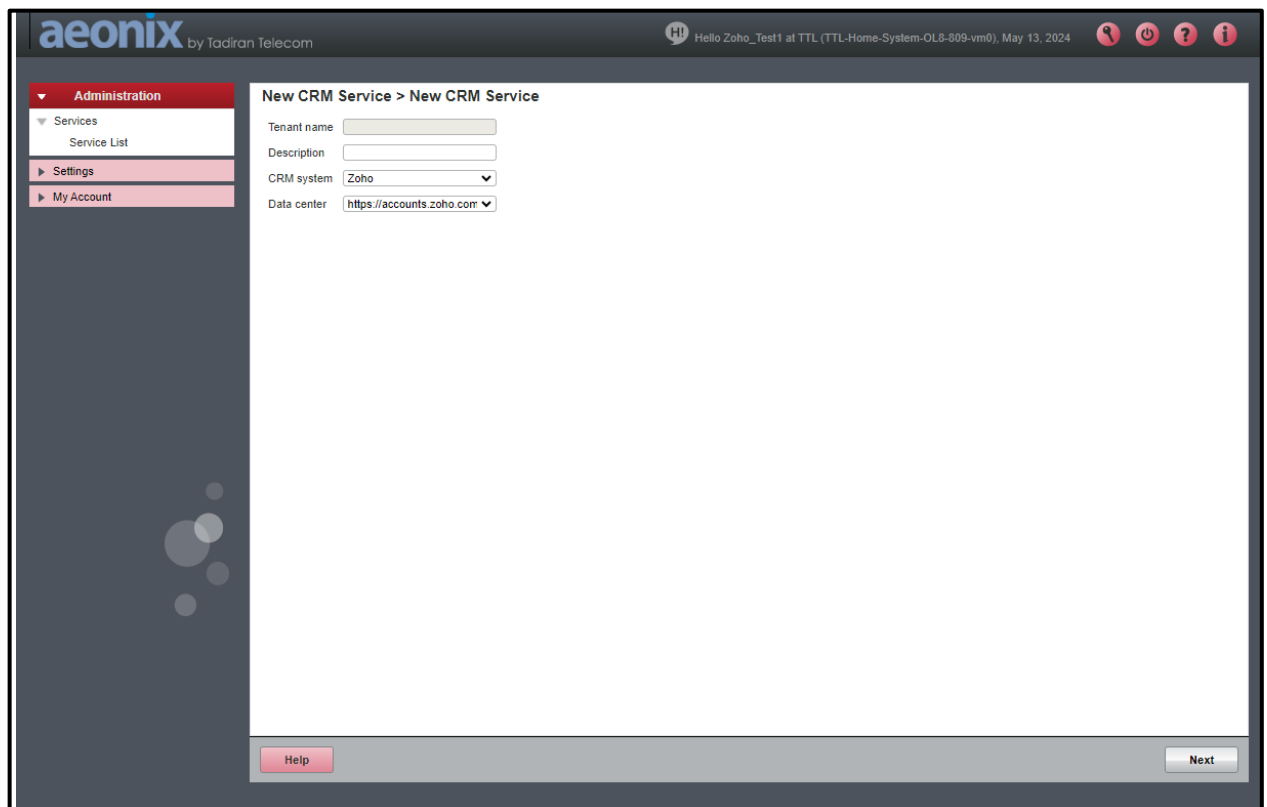


The list of CRM service enabled for the user is displayed.



Click **Add**.

The editable details of the new service are displayed as shown.



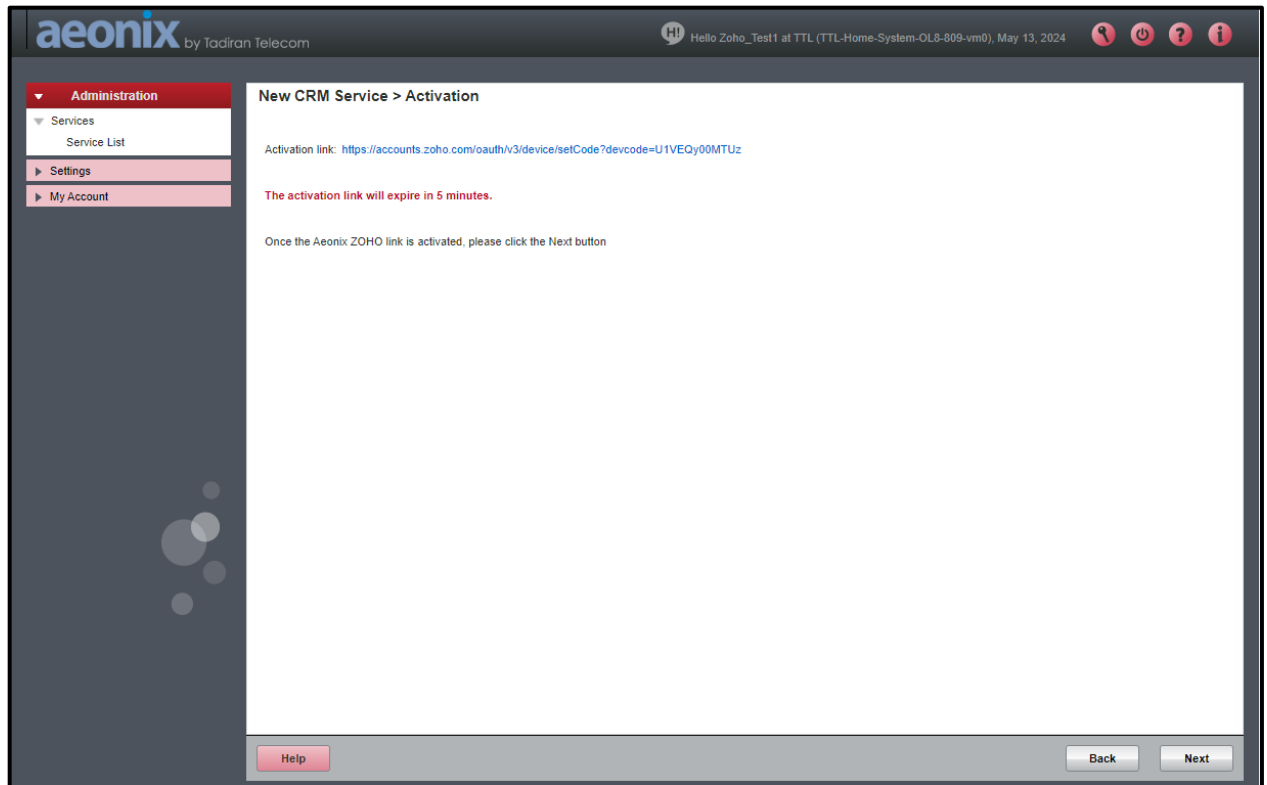
The screenshot displays the Aeonix web interface. The top header shows the 'aeonix by Tadiran Telecom' logo on the left and a user greeting 'Hello Zoho_Test1 at TTL (TTL-Home-System-OL8-809-vm0), May 13, 2024' on the right, along with several status icons. A left-hand navigation menu is visible with options: 'Administration' (expanded), 'Services' (with a sub-option 'Service List'), 'Settings', and 'My Account'. The main content area is titled 'New CRM Service > New CRM Service'. It contains four form fields: 'Tenant name' (text input), 'Description' (text input), 'CRM system' (a dropdown menu currently showing 'Zoho'), and 'Data center' (a dropdown menu currently showing 'https://accounts.zoho.com'). At the bottom of the form area, there are two buttons: 'Help' on the left and 'Next' on the right.

Enter a description of the user's CRM instance, and choose the type of CRM and the Data Center.

Click **Next**.

2.1.1 Connecting between the user Logged into Aeonix and Zoho

Aeonix will provide a link as shown. You **must** click on the link within 5 minutes.



The link will take you to the Zoho site, and you will be asked to login to your Zoho account (if you are not already logged in). A Zoho dialog will ask you to approve the PhoneBridge-Aeonix PBX integration. Click **Accept**



After clicking on **Accept**, continue in Aeonix, and press **Next** to proceed to the final screen for adding users.

2.2 Adding Users

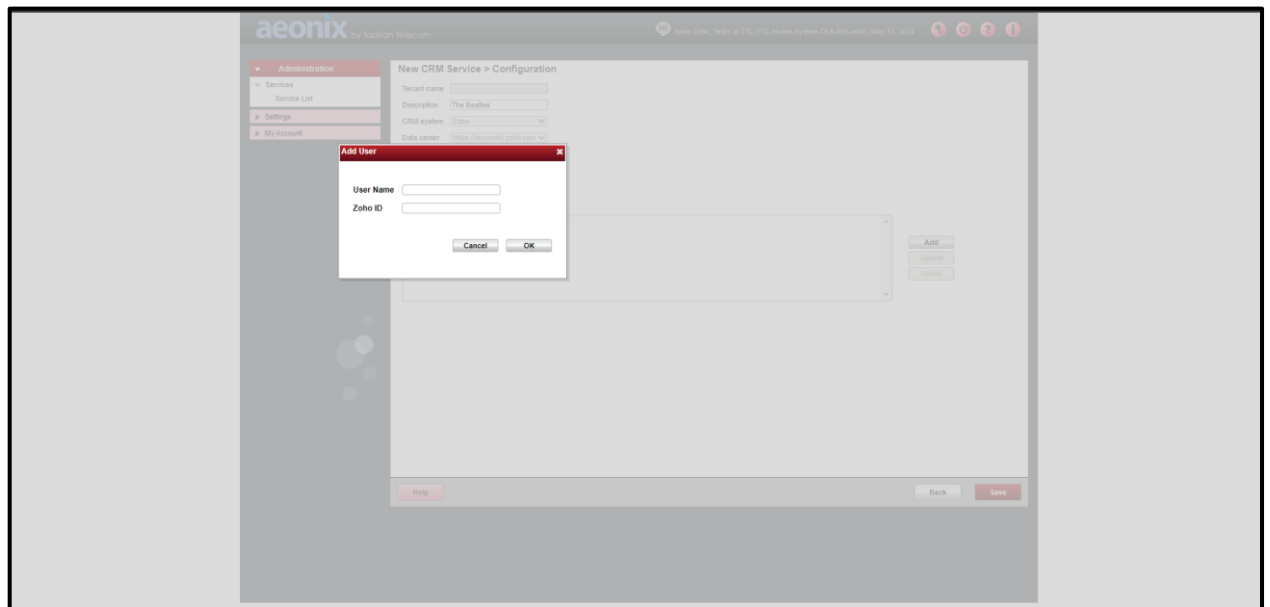
On this screen, you can add and remove users. When adding a user, you need to enter the username in Aeonix and the user in Zoho according to the Zoho ID.

The screenshot shows the Aeonix web interface. The top header includes the Aeonix logo and the text "by Tadiran Telecom". The right header shows a user profile "Hello Zoho_Test1 at TTL (TTL-Home-System-OL8-809-vm0), May 13, 2024" and several status icons. The left sidebar has a menu with "Administration" (selected), "Services", "Settings", and "My Account". The main content area is titled "New CRM Service > Configuration". It contains the following fields and options:

- Tenant name:
- Description:
- CRM system:
- Data center:
- ☒ Enable
- ☐ Calls are notified by Contact Center

Below these fields is a section titled "Zoho CRM Users" with a large empty table. To the right of the table are three buttons: "Add", "Update", and "Delete". At the bottom of the page are three buttons: "Help", "Back", and "Save".

- Click **Add**



Enter user details and click **OK**.

Once you added all users, press the **Save** button.

If you have any questions regarding this note, please contact our **Support team** at:

<http://www.tadirantele.com/en/contact/support/>

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