HOW TO ADD ZOHO VIEW OR READER ACCOUNT
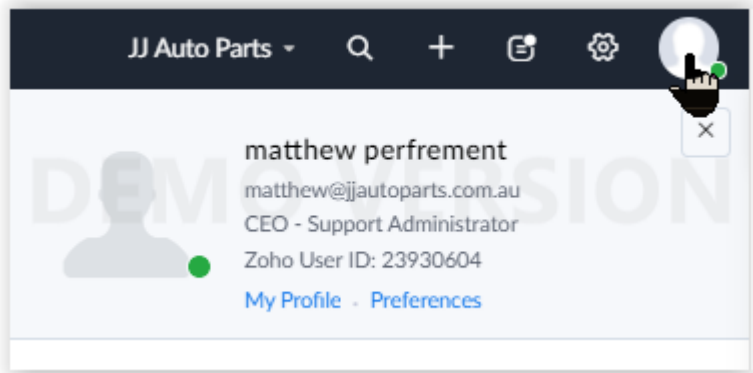
-UPDATED CHARLES 05/12/23

LINK TO ZOHO LOOP

We do this because we still have guides that are on zoho and new staff will required log ins to access zoho docs

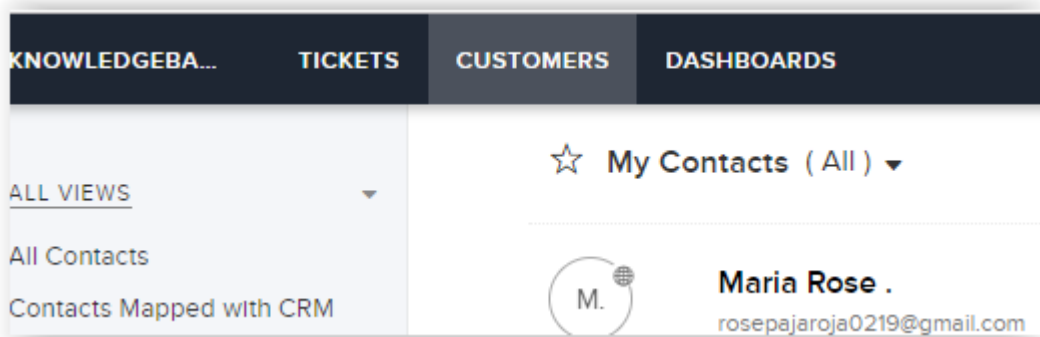==============================

SETUP -

**-HAVE ACCESS TO ZOHO EDIT,
WRITE ACCOUNT AS MATTHEW@ JJAUTOPARTS.COM.AU
SEE SEPERATE GUIDE - HOW TO GET ACCESS**

—-------------------

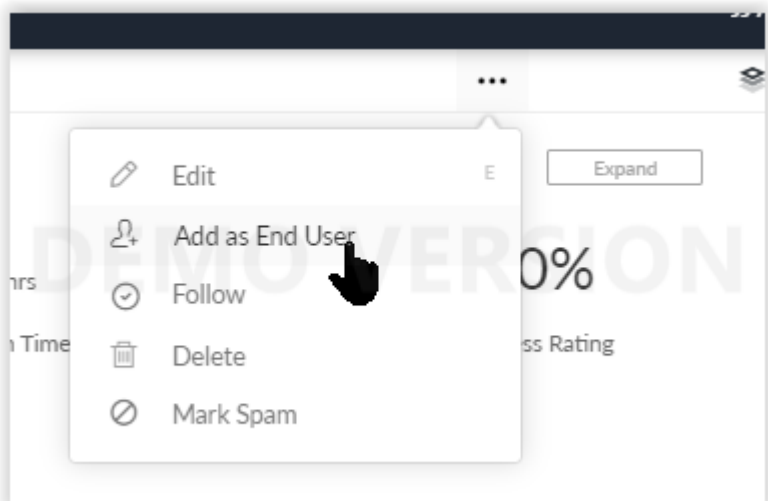## STEPS-

GO TO CUSTOMER TAB

PLUS SIGN ON TOP BAR
ENTER IN FIRST AND LATE NAME AND EMAIL ADDRESS
SELECT SUBMIT

ADD AS A USER WITH EMAIL ADDRESS THEN GO BACK AND INVITE TO HELP CENTRE

Inviting Customers to Help Center

Although your customers can submit their tickets through various channels, they can track their status only when they have access to your Help Center. There are two ways, for your customers to access your Help Center:

- Create their own user account by self-registration
- Agents can invite customers from the Contacts module

While the customer self sign-up is a feature which needs to be enabled by your support manager. You have two options for inviting contacts to become Help Center users: you can send a bulk invite to all contacts, or you can select contacts individually.

To invite contact individually:

1. Click the **Customers** module.
2.
3. In the **Contacts** module, **open** a contact to view its details.
4.
5. Click **More Actions** icon (● ● ●) from the top pane.
6. Click **Add as End User** from the menu.
7. Click **Continue** on the dialog box, to invite the contact.

==

Email email might have to be sent again

Email looks like this below

===

From: jjautoparts [mailto:matthew@jjautoparts.com.au]
Sent: Tuesday, 30 October 2018 4:04 PM
To: Buyer <buyer@jjautoparts.com.au>
Subject: JJ Auto Parts Portal Invitation

Dear trainer jj,

Welcome to JJ Auto Parts!

You are invited to access JJ Auto Parts's Customer Self Service Portal. By accessing this portal you can now access the knowledge base and send in support tickets.

Your User Name: buyer@jjautoparts.com.au

Please click here to accept invitation.

If you are not the intended recipient of this invite, please contact the JJ Auto Parts Administrator.

Once you have successfully created your account on the Portal, the first step to take is sign in and view the tutorial on how to use the Knowledgebase:

Click here to view the tutorial.

Thank you,

JJ Auto Parts

====================
Deactivating Help Center Users

You can revoke access to the Help Center by deactivating users in Zoho Desk. Once deactivated, the user will not be able to log in to your Help Center.

To deactivate user:

1. Click the **Setup** icon ( ) in the top bar.
2.
3. In the *Setup Landing* page, click **Help Center** under **Channels**.
4.
5. In the *Access Settings* page, click **Users** from the left panel.
6.
7. Switch to **Active** View at the top of the page.
8.

9. Hover your mouse pointer and click the **Edit** icon ( ) corresponding to the user.
10. You can use the *search box* to locate the user quickly.
11. In the *Customer Information* page, uncheck the **Active** option.
12.
13. Click **Save**.
14.

The user will be deactivated, and a notification email about the deactivation is sent. You can re-activate users when required.