Automated Sync - Customer Administrator Guide

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1 Overview

The Customer's Administrator is responsible for authorising the Call2Teams service to run synchronisations, to ensure new users are added to the service, and to maintain existing users. By default this performed as a manual action, via the Call2Teams Admin portal.

In addition, where Call2Teams Go is offered, it is the responsibility of the Customer's Administrator to authorise and enable this.

1.1 Auto Sync overview

The Call2Teams Sync feature requires authorisation from the Customer's Administrator to modify the customer's Microsoft tenant. Once this is granted, the service can run automated syncs on a regular basis, bringing any changes in to the service without the need for manual intervention.

If the Call2Teams Go feature is enabled, this too requires authorisation and synchronisation as above, and then works as a native phone client within the Teams client.

1.2 Options

- Customers have the option to continue to run synchronisations manually, via the service portal, with additional steps to enable, authorise and sync Call2Teams Go (where offered). *This is the current default state*.
- If enabled, they can turn on the ***automated sync*** feature via the service portal, which will run a sync at regular intervals on their behalf. This option requires the Customer Administrator to log into the service portal once, to enable the feature.
- By integrating Zero Touch Provisioning (ZTP) elements into their service offering via the service API, the Partner can create their own offering - such as an Enable Sync button - within their own service; or:
- Create a fully automated workflow including authorisation and sync enablement, to remove the need for the customer administrator to be involved in the sync process.

The above applies to the Call2Teams Go feature as well.

> **Note**
>
> Any auto sync flow will have the constraint of a sync running **at regular intervals**.

2 Enabling Automated Sync via the Portal

Follow the steps in this guide to enable Automated Sync for your customers.

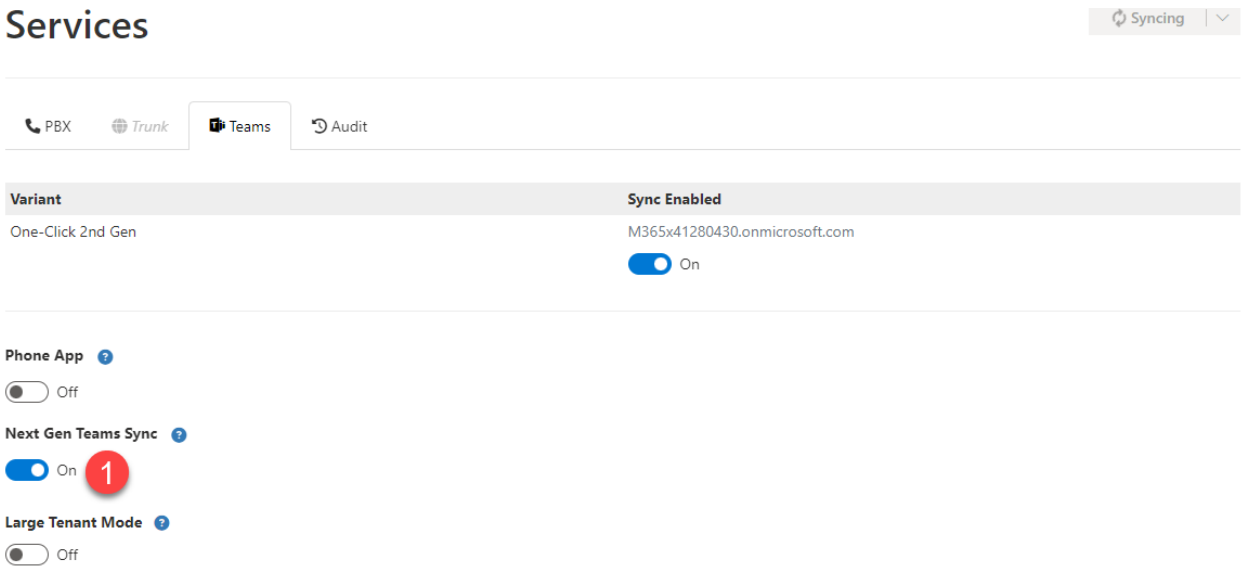
This is an account level change and so will need to be applied in each customer's portal, by someone with Customer Administrator level access.

We recommend performing these steps at an appropriate time so as to ensure you minimise the risk of service disruption.

Tip
Ensure that your browser is set to allow popups whilst performing the steps in this guide!

Log in to your Call2Teams Admin portal

1. Navigate to your **customer's Services** settings
2. Click on the Teams tab
3. Click the **Auto Sync** toggle **on** to *enable* Automated Sync

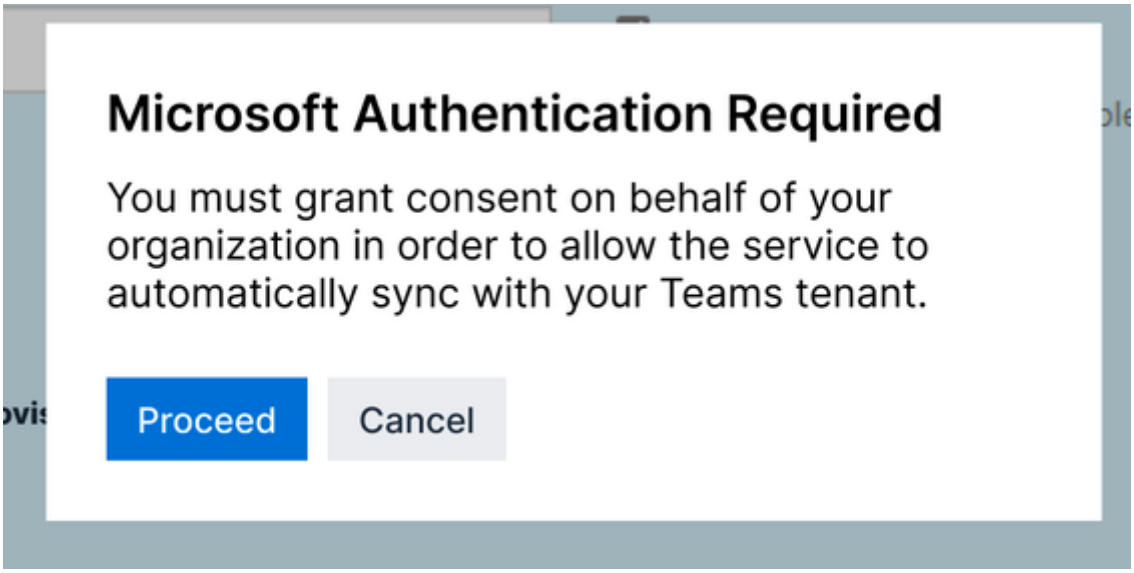




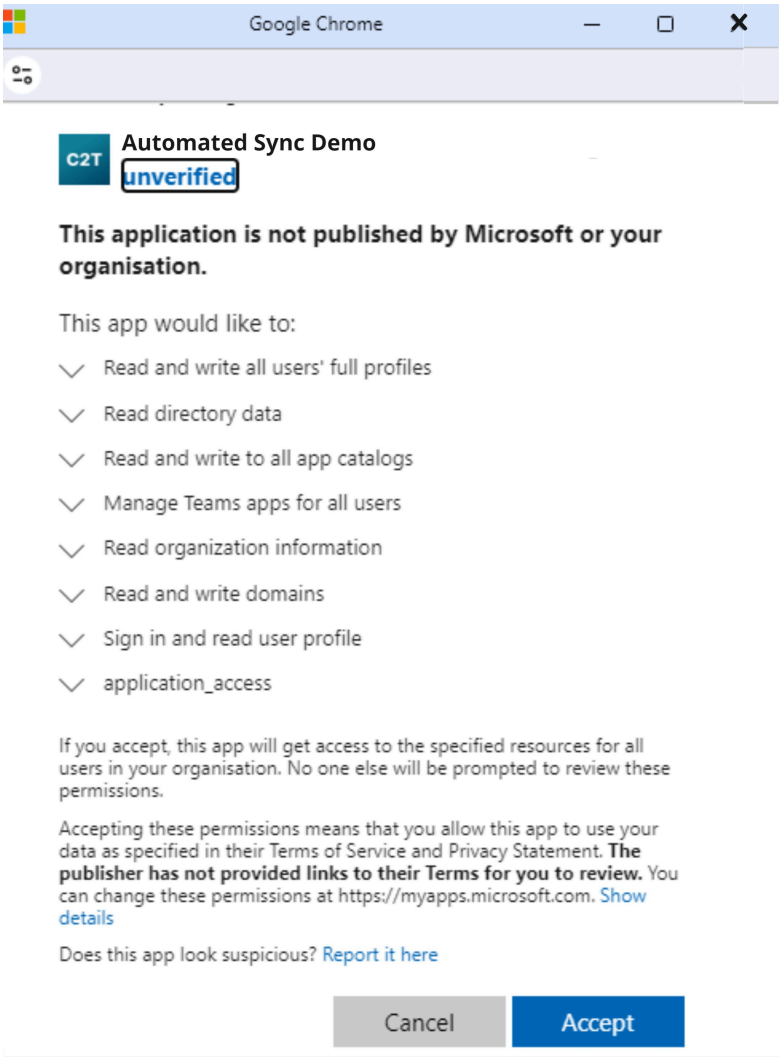
5. Click **Save** (in the bottom right corner of the screen)
6. Toggle **Auto Sync** to **on**



7. Click **Proceed** on the pop up modal:


Microsoft Authentication Required
You must grant consent on behalf of your organization in order to allow the service to automatically sync with your Teams tenant.
Proceed
Cancel

7. Grant consent on the Microsoft Authorization screen:



Note

By granting consent the service can then monitor for, and make necessary changes to, your users and numbers.

8. Run a manual sync - Click the **Sync Now** button and authenticate if required.

Your service will now automatically look for and synchronise changes at regular intervals.

Note

The **Sync Now** button is still available, even when Automated Sync is enabled.

It remains visible in the portal but will be **disabled when a sync is either queued or running**.

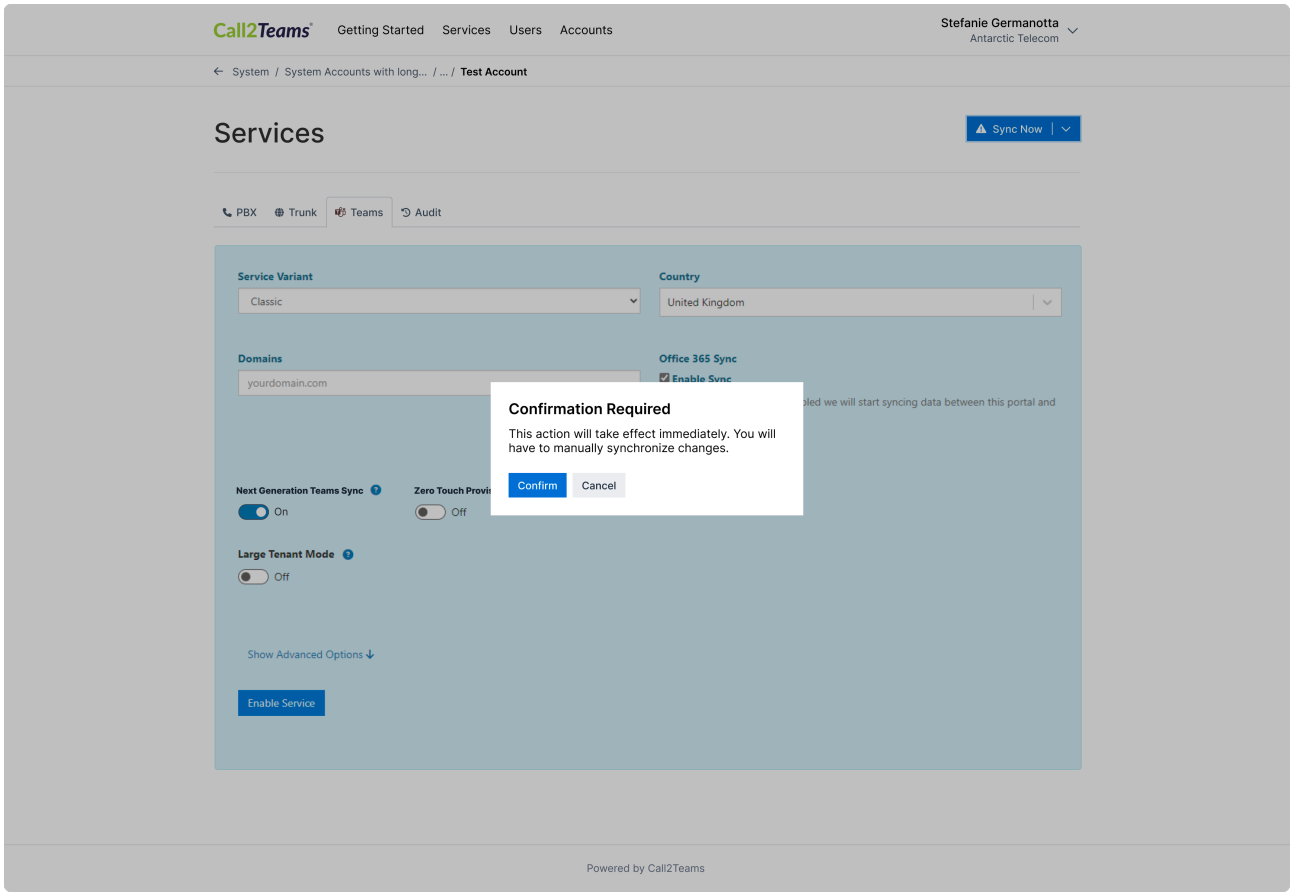
FAQ

Why might I want to run a manual sync if I have Automated Sync enabled?

- Some changes lie outside of the current scope of the feature and may need user intervention.
- In case you make a change to a tenant configuration that you wish to revert.
- For assisting with diagnostics.

3 Disabling Automated Sync via the Portal

1. Click the **Automated Sync** toggle **off** to *disable* Automated Sync
2. Click **Confirm** on the pop up modal:



Warning

By disabling **Automated Sync** you will need to **manually** synchronise any changes in future.