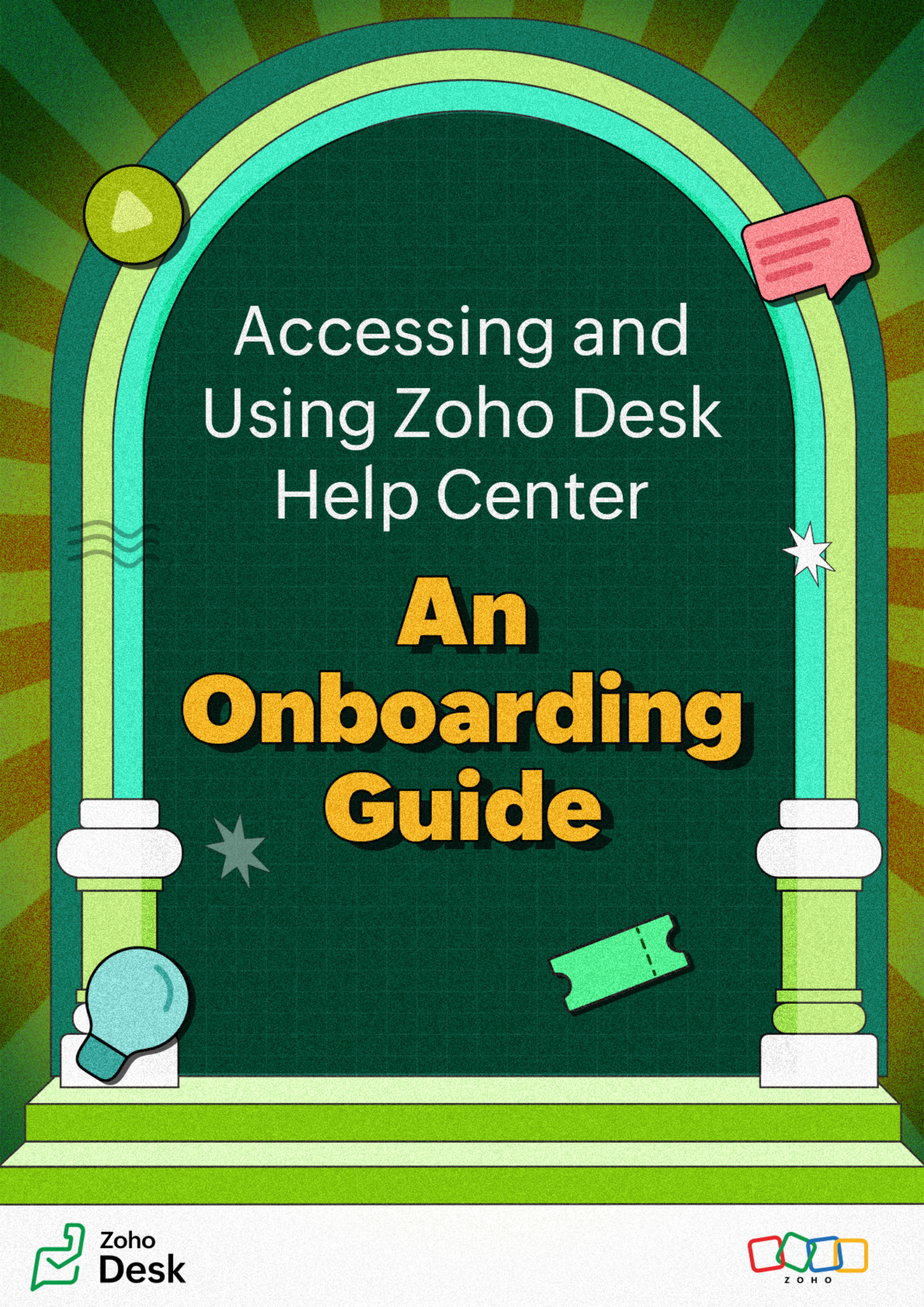




Accessing and
Using Zoho Desk
Help Center

**An
Onboarding
Guide**

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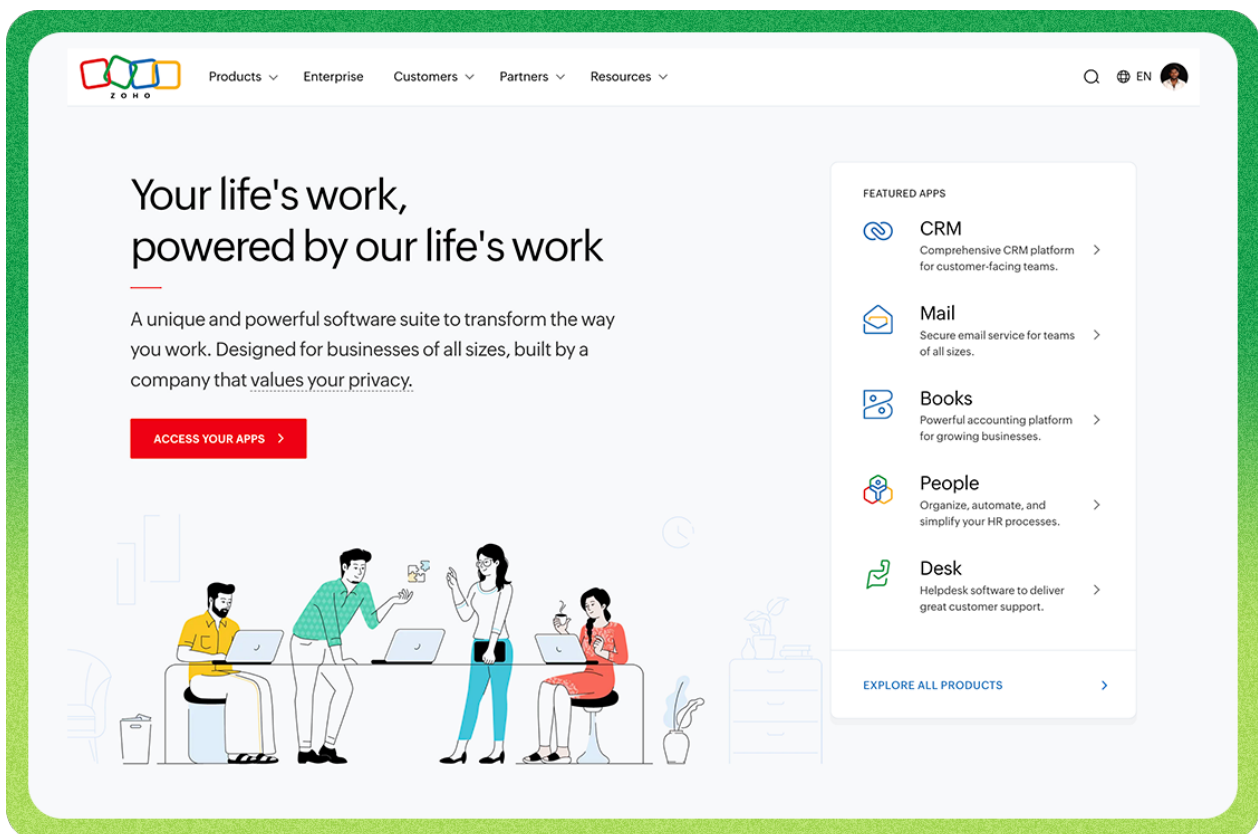
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Introduction

A help center is a self-help and learning platform built by the company, service, or a business provider for its customers. It empowers the customers to resolve their inquiries by referring to the knowledge base resources and also by engaging with other customers.

Customers can find the link to the help center from the company's webpages.

Below is an image of Zoho's help center on its webpage for reference.



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Company

[About Us](#)
[Our Story](#)
[Press](#)
[Events](#)
[Branding Assets](#)
[Zoho Schools](#)
[Service Status](#)
[Careers](#)

Contact Sales

Phone

[1800 103 1123](#)

[1800 572 3535](#)

Email

sales@zohocorp.com

[Support >](#)



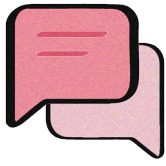
[Home](#) [Knowledge Base](#) [Community](#) [Sign In](#) [English](#) [v](#)

Welcome to Zoho Cares

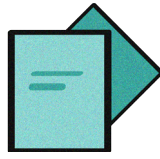
[Product Help](#)

[Support Services](#)

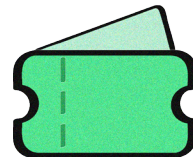
A help center generally gives access to:



Community forums



Knowledge base

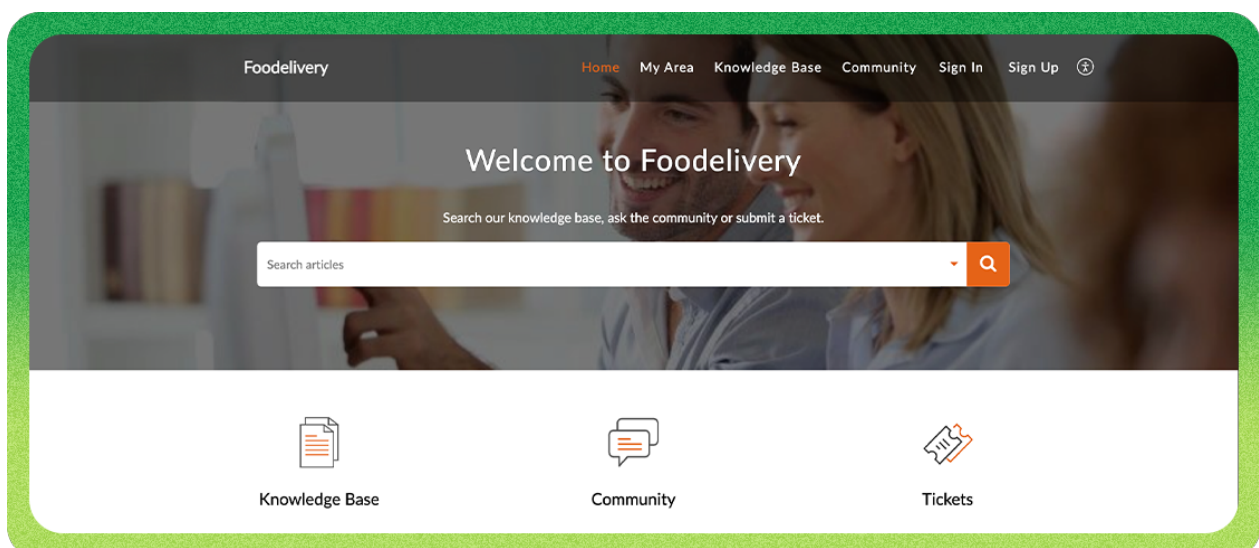


Tickets

This onboarding guide will demonstrate how customers can access and use any help center powered by Zoho Desk.

Business scenario

Zylker's Foodelivery, a food delivering chain, set up their help center using Zoho Desk. They have a knowledge base, a community forum, a live chat, and a tickets module where their customers can reach out for help.



Who should be able to access the help center?

Any customer should have access to the help center either through their desktop or mobile. The customers who sign up for the help center can perform certain actions, while an unregistered user will have limited actions.

The table below lists the actions customers can perform if they sign up for the help center, along with the actions anonymous (unregistered) users can perform.

Actions	Signing Up (Registered user)	Anonymous User (Unregistered user)
Knowledge Base		
Read articles	✓	✓
Follow categories, sections, and articles	✓	✗
Like or dislike the articles	✓	✓
Like or dislike the articles	✓	✓

Actions	Signing Up (Registered user)	Anonymous User (Unregistered user)
Knowledge Base		
Share the articles as posts on Facebook, LinkedIn, and X	✓	✓
Comment on the articles	✓	✗
Print articles	✓	✓
Download articles as PDFs	✓	✓
Community		
Read community posts	✓	✓
Follow community posts	✓	✗
Post a question, idea, or problem	✓	✗
Like or dislike the posts	✓	✗
Comment on the post	✓	✗
Share the posts on Facebook, LinkedIn, and X	✓	✓

Actions	Signing Up (Registered user)	Anonymous User (Unregistered user)
Knowledge Base		
Print posts	✓	✓
Download posts as PDFs	✓	✓
My Area		
Access my area	✓	✗
Add tickets through My Area	✓	✗
View ticket status	✓	✗
Access ticket views	✓	✗
Search tickets	✓	✗
Sort and filter tickets	✓	✗

Actions	Signing Up (Registered user)	Anonymous User (Unregistered user)
Adding Tickets		
From the homepage	✓	✓
From My Area	✓	✗
Customizing the help center	✓	✗
Managing user profile	✓	✗

The actions users can perform on their desktop can also be done through their mobile.

How to sign up for the help center?

To sign up for the help center:

1. Click the **help center's link** from the company's website.
2. Click **Sign Up**.
3. Enter your Name, Email Address, and the text in the CAPTCHA image and click **Sign Up**. A confirmation email will be sent to your registered email address.

4. Open the email and click **Accept the Invitation***. You will be redirected to the help center.
5. Enter your password and confirm it.
6. Click **Register**. You will be redirected to the Manage Profile page.
7. Enter your **Personal details** and click **Save**.

***Note:** The “Accept the Invitation” email will be valid for only 30 days.

How to sign in to the help center?

Users who have already signed up for the help center can sign into their accounts when needed.

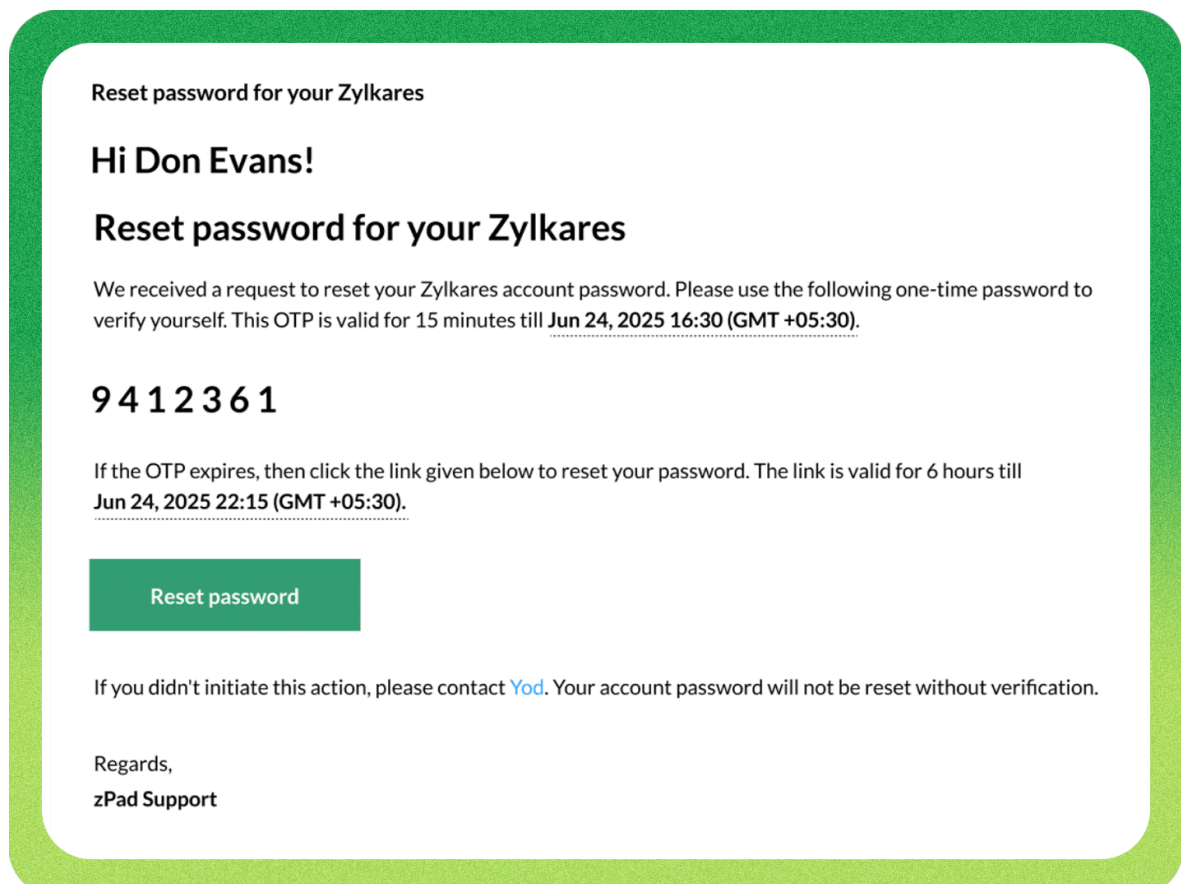
To sign in to the help center:

1. Click the **help center's link** from the company's website. You will either be redirected to the *Sign In* page or the *Homepage*.
2. If you land on the *homepage*, click **Sign In** in the top-right corner of the page.
3. Enter your registered email address and password.
4. Click **Sign In**.

How to sign in if you forget your password?

To sign in if you forget your password:

1. Click the **Help center link** from the company's website. You will be redirected to the Sign In page.
2. Click **Forgot Password**.
3. Enter your username or registered email address and the text in the CAPTCHA image.
4. Click **Submit**. An email will be sent to your registered email address with an OTP and a hyperlink to reset the password. The OTP is valid for 15 minutes. If you miss the time window, you can click on the hyperlink to reset your password. The hyperlink will be valid for 6 hours.



To change password using the OTP

5. Enter the given OTP and click **Verify**.
6. Enter your **New password** and re-enter password to confirm.
7. Click **Change Password**.

To change password using the hyperlink

5. Open the email and **click Reset password**. You will be redirected to the Zoho Accounts page.
6. Enter your **New password** and **Confirm**.
7. Click **Reset Password**.

What can users do from the help center?

Users can access Zoho Desk's help center to access the community forums, browse the knowledge base, submit tickets, and chat with agents.

Access community forums

A platform that allows help center users to engage with other customers by sharing ideas, answering their questions, and starting a discussion.

The customers can post their inquiries in the community with the company's staff like customer support executives, sales agents, or support agents who will respond.

To add a question, idea, or problem:

1. Go to the **Help Center > Community > Add Topic**.
2. Select the topic **type** and **category**. Write a title and fill in the description and tags. You can also attach files if needed.
3. Click **Post**.

The screenshot shows the 'Add Topic' interface in Zoho Desk. At the top, there's a breadcrumb 'Community / Add Topic' and a search bar. The main heading is 'Add Topic'. On the right, there's a 'Draft (1)' section showing a draft titled 'Payment page glitch'. The form fields include: 'Topic Type' (a dropdown menu currently showing 'Question'), 'Title' (a text input field with placeholder 'Topic Title...'), 'Description' (a rich text editor with a toolbar containing bold, italic, underline, link, unlink, list, and image icons, and a font size dropdown set to 12), 'Category' (a dropdown menu with placeholder 'Select Category'), 'Tags' (a text input field with placeholder 'Type and press enter to add tag.'), and a checkbox for 'Follow this topic'. At the bottom, there's a file attachment section with a paperclip icon and the text 'Attach a file (Up to 20 MB)'. Below the form are four buttons: 'Post' (orange), 'Save as draft' (orange), 'Preview' (orange), and 'Discard' (grey). In the bottom right corner, there's a status indicator 'We're offline' with a 'Leave a message' button and a chat icon.

To subscribe to community posts:

1. Go to the **Help Center > Community > Follow**. The customers will receive notifications whenever any activity takes place in the community.

Access the knowledge base

The knowledge base is a vast database of information in the form of blog posts, user manuals, ebooks, newsletters, product updates, FAQs, and more to help users learn more about the business or product they are interested. These resources are a self-service offering users can access to solve smaller issues on their own.

A company can split their knowledge base into categories, sections, and articles based on their organization.

Users can choose to follow specific knowledge base articles to receive notifications regarding the article. For example, if a user adds a comment to the article or replies to a comment, a notification will go out to all users following the article.

To follow a category, article, or section in the knowledge base:

- Click the **follow** icon to get email notifications when:
 - A new article is added.
 - An article is modified or updated by the agent.
 - A public comment is added by a customer or agent.
 - Agent posts a public comment.
 - Other actions that can be done in the knowledge base are:

- Like or dislike an article.
- Share the article as posts on Facebook, X, and LinkedIn.
- Post comments (questions or feedback) for the article. The company's agents can post a comment as a response. These comments are visible to the public, so they can benefit other customers with similar questions.
- Convert the articles to a PDF and also print them if needed.

The screenshot shows a web page for Foodelivery's Knowledge Base. The article is titled "How to Register for a Refund in Foodelivery App". The page includes a navigation bar with links to Home, My Area, Knowledge Base, Community, Sign In, and Sign Up. The article content explains the refund process and provides a step-by-step guide. The first step is "1. Identify the Issue Quickly", which lists common issues like missing items or incorrect dish delivery. The page also features a "Helpful?" section with thumbs up/down icons, social media sharing options, and a comment section with a rich text editor and file upload button. On the right, there is a "On this page" table of contents and a "Follow" button to subscribe to notifications. A "General" section lists related articles, including the current one. A "We're offline" message bubble is visible in the bottom right corner.

Foodelivery Home My Area Knowledge Base Community Sign In Sign Up

Knowledge Base / sahana / General Search articles

How to Register for a Refund in Foodelivery App

Ordering food online has become an everyday convenience, but sometimes things don't go as planned. Wrong items, missing dishes, late deliveries, or food quality issues can all lead customers to request a refund. Thankfully, Foodelivery has built-in refund processes to handle these situations.

Here's a step-by-step guide on how to register for a refund in any food delivery app:

1. Identify the Issue Quickly

Before raising a refund request, make sure you have a valid reason. Common issues include:

- Missing items in the order
- Wrong or incorrect dish delivered

Updated: 1 month ago

Helpful?

Comment

Attach a file (Up to 20 MB)

Add Comment Cancel

On this page

1. Identify the Issue Quickly
2. Open the App and Navigate to Your Order History
3. Select "Help" or "Support"
4. Choose the Relevant Issue
5. Request a Refund or Alternative Resolution
6. Track Your Refund Status
7. Contact Customer Support (If Needed)

Pro Tips for Hassle-Free Refunds

Follow

Subscribe to receive notifications from this article.

General

- How to Register for a Refund in Foodelivery App

We're offline
Leave a message

Adding tickets

A support ticket is a record submitted by the user to either report an issue or seek help from a company's support team, thus ensuring the customer questions and concerns are handled quickly and efficiently. A company can split their knowledge base into categories, sections, and articles based on their organization.

To add tickets

1. Go to **Help Center > Tickets > Add a Ticket (or) Help Center > Submit a Ticket**.
2. Fill out the required fields.
3. Click **Submit**.

Note: Customers can also add tickets without signing up, but they won't be able to keep track of the status.

The users can also:

- Filter the tickets based on department, status, and channel.
- View tickets under standard views: My Tickets, My Open Tickets, My closed tickets, My On Hold tickets, My Overdue Tickets (displayed only for the registered users).

Live chat

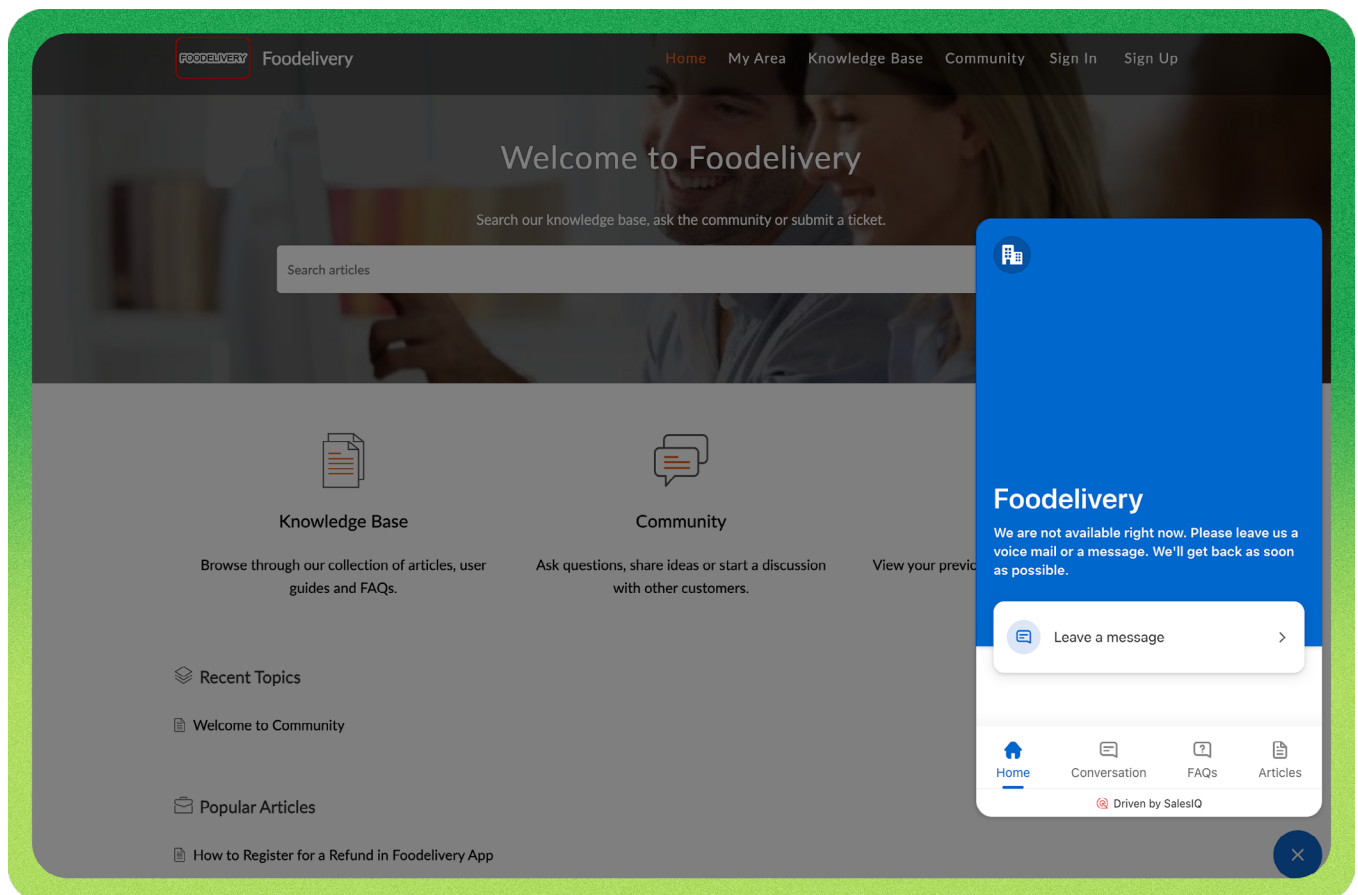
Customers can also contact the live chat to talk to agents directly.

To access live chat

Go to the **help center** > **live chat**



> **Chat with us now.**



Profile management in the help center

In the help center, click the **profile** icon and go to **View Profile** to see the following:

- **Dashboard** - Overview of the posts, comments, and replies they've made.
- **Activity** - Topics and replies they've added to the help center.
- **Watchlist** - Articles, categories, community posts, and users they are following.
- **Manage Profile** - Options to edit their profile, change their password, and delete their account.

Editing their profile

The customers can edit their username, display name, email address, phone number, social media details, and location details under the Manage Profile section of their profile. They can also change their password and delete their account permanently if necessary through the Manage Profile section.

Contact Us

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support@zohodesk.com | www.zoho.com/desk