



Zoho
Desk

Admin Training Agenda



Day 1 - 4 hours

Chapter 1: Introduction

- Welcome to Zoho Desk
- Benefits of Zoho Desk
- Creating an account on Zoho Desk
- Overview of Departments
- Introduction to modules

Chapter 2: Multi-Channel Support

- Importance of channels
- Need for channels

Email

- What is a "support email address" and how do you create one?
- How email forwarding helps create tickets
- What is a "from address" and how do you create one?
- Need for SMTP
- DKIM
- Spam handling
- Other email configurations for your account



Help Center

- What is a help center?
- Access settings of the help center
- Understanding contact and end user
- Invite your customers to access your help center
- Add your users to the self-service area portal
- Themes and advanced customizations
- Contacts and accounts
- Impacts of duplicate account and contacts
- Associating multiple accounts with a contact
- Labels and groups
- Optimize your customer search using SEO
- Track users with Page Sense and Google Analytics

Knowledge Base

- Building thorough knowledge base articles
- Access settings of knowledge base module
- Organize and manage knowledge base
- Dashboard and gallery
- Multi-lingual



User Community

- What is a user community and can it help your organization?
- How to create and manage a post and a forum
- Preferences for your posts
- How to moderate a post
- Convert topics and track as tickets
- How gamification can manage enthusiastic customers with badges and ranks

Social Brands

- Create social connections using your own brands
- Importing your brands from Zoho Social
- Managing Facebook posts
- Agent handling data from social
- Managing tweets
- Managing Facebook and Twitter direct messages



Voice Call Support

- Support your customers from anywhere via telephone service
- On-premise telephony support
- Use the phone bridge method to integrate with other providers
- Usage of calls in activity modules
- Agent call management

Web Forms

- Classification of web forms
- Allow customers to submit queries from your website via web forms
- Collect feedback on your content via feedback widgets

Instant Messaging for Your Business

- Integration of popular messaging apps
- Auto responses
- Monitoring metrics on the dashboard



Day 2 - 4 hours

Chapter 1

Advanced Channels

ASAP

- Importance of ASAP
- Cast your help center in your website or blog
- Zia bot with ASAP
- ASAP customizations
- User authentication in ASAP
- Creating tool tips and Chrome extensions
- Guided conversation bot with ASAP

Live Chat

- Configuration of instant chat support
- Embed live chat on your website
- Advanced chat settings



Guided Conversation - Self-Service Bot

- Blocks and variables
- Building your chat conversation flow
- Connecting with other services - webhooks

Chapter 2 - Tickets

- Overview of the tickets module
- How to help your agents handle your customer queries
- Using ticket work modes for effective customer support
- Help agents organize their tickets using views
- Pick on-demand tickets from the queue
- Managing comments and resolutions
- Approval process
- Difference between move, share, and split tickets
- Manage your team via feeds and notifications
- Follow your important customers
- Monitor your agents via headquarters



User Preferences and Accessibilities

- Selecting your preferred theme
- Switch to night mode
- Set your display layout
- Default editor font
- Accessibility controls

Activities

- Importance of the Activities module
- Create and manage tasks
- Create and manage calls
- Create and manage events



Chapter 3 - General Settings

- Significance of the primary contact in a company

Rebranding

- Significance of branding Zoho Desk
- Impacts or areas where your branding will appear
- Customize the company logo and fav icon
- Map your own domain
- Significance of multi branding and its functions
- Customize the portal name

Account Setup

- Setting up business hours and holiday list
- Configure customer happiness and the effects of it

Departments

- Significance of departments
- Structuring and configuration of departments
- Private vs. public departments

Products

- Need for products
- Create and manage products
- Association of products



Day 3 - 4 hours

Chapter 1 - Customization

Ticket status

- What is a ticket status?
- Types of statuses
- Options for ticket status

Customize and Improve

- Need for customization
- Explanation of layouts
- Field customization
- Types of field and field counts
- Options of fields
- Managing field permissions
- Managing sections and rearranging fields
- Profile-based permissions
- Module layouts
- Multi-layouts
- Layout cloning



Automation via fields

- Layout rules
- Field dependencies
- Validation rules

Handling Modules

- Renaming modules
- Handling modules

Templates

- Importance of email and ticket templates
- How to build and restrict email templates
- Building ticket templates
- Use of ticket template

Time Tracking

- Using the time tracking feature
- Automating time tracking
- Manual vs automatic time tracking
- Billing for customer support



General and Personal Settings

- Associating multiple accounts to contact
- Agent idle time out settings
- Managing CCs on tickets
- Handling spam

Chapter 2 - Automation

- Assignment rules
- Understanding the round robin pattern
- Configure the round robin rule
- Tracking status from Headquarters
- Direct assignment vs round robin
- Email and SMS notifications
- Schedules and its uses
- Significance of SLA
- SLA and support contracts
- Time-based actions
- Skills and its usage in automation



Chapter 3 - Support Pillars

- Agents
- Agents and their permissions
- Significance of anonymizing agents
- Managing teams
- Managing roles and profiles
- Light agent
- Rewarding agents using game scope



Day 4 - 4 hours

Chapter 1 - Advanced Automation

- Significance of workflows
- Configuration of workflows
- Custom action - quick automation through workflows
- Significance of custom functions
- Macros
- Difference between workflows and macros
- Phenomenon of blueprints
- Understanding transitions and the need for request cycles
- Configuration of blueprint

Chapter 2 - Managing Data

- Importing and exporting data
- Recycle data
- Data migration
- Zwitch
- Use of the bulk actions log
- Data backup
- Data subject requests (DSR)



Connect with Applications

- Integrations with in-house applications
- Integrations with Microsoft
- Extensions
- External applications

Chapter 3 - Developer Console

- Webhooks
- Mobile SDK
- API
- Connections
- Build your own extensions

Chapter 4 - Zia

- How Zia can help administrators
- Understanding the pulse of the customer
- Adding auto tags
- Reply assistant for agents
- Forecast your volume of data
- Zia translator
- Zia custom predictor
- Automation using Zia



Chapter 5 - Analytics

- Monitor the statistics using overview
- Default and static reports
- Cross module reports
- Cross departmental reports
- Creating custom reports
- Create charts for custom reports
- Helping agents track their performances using dashboards
- Use multiple dashboards for team statistics
- Customer happiness analytics dashboard
- Ticket status dashboard
- SLA dashboard
- Blueprint dashboard
- Telephony dashboard
- Zia dashboard
- Creating custom dashboards and adding components
- Schedule and send data to management
- Radar - real time analytics on the go

