Zoho Desk

Agent Training Agenda

Overview

This program will cover how an agent can work efficiently in Zoho Desk.

You will learn how to take ownership of questions asked by your customers and manage your queue.

Who it is for:

This is for the person who will be collaborating with your customers. Any individual who wishes to contribute to their organization with effective customer support can take this course.

Chapter 1 - Ticket Handling

- Ticket channels

- Ticket options

- Organizing daily tickets using views

- Table view

- Custom views

- Picking the best ticket using views

- Team queue

- Understanding work modes

- Significance of statuses

- Ticket self assignment

- Templates for quick creation

Response options

- Direct responses

- Use snippets to offer solutions quickly

- Difference between snippets and email templates

- Suggested articles

- Zia reply assistant

- Formatting bar

Advanced ticket options

- Mass actions

- Ticket read/unread

- Tag your tickets

- Keep track: Use ticket following

- Move, share tickets across departments

- Merge tickets

- Split and clone tickets

- Ticket deletion

- Compact ibar for quick view/action

- Quick view through ticket peek

- Search and advanced search

Ticket views

- Default and custom views
- Starred and archived views
- Agent and team queues
- Tags view
- Spam view: Identify malicious attacks
- Display preferences

Working with tickets

- Differentiate threads and comments
- Track time spent on tickets
- Audit log
- Approval
- Create and manage your activities
- Collaborate with your team via comments
- Ticket attachment
- Understanding the importance of resolution
- Handling blueprints in tickets
- Understanding the usage of timelines
- Activity tracker
- Agent collision
- Notification alerts

Collaborate

- Track flow using headquarters

- Team feeds: The new way to collaborate

- Get instant notifications

- Chat with internal users

- Follow your customers

- Mentioning colleagues in comments

How may I assist you?

- Handling email tickets

- Public and private response

- Handling social media

- Assisting queries via chat

- Managing forums

- Instant assistance using IM

User preferences:
Enhance your user experience

- Switching to night mode

- Choosing a preferred theme

- Font preferences

- Accessibility controls

- Create a signature

- Ticket preference settings

Other modules

- Know your customers

- Difference between Accounts and Contacts modules

- Knowledge base

- Reports and dashboards