

Work Sample: Configuring Business Hours in Zoho Desk

Defining Business Hours

Business Hours in Zoho Desk are the working hours during which the support team is actively available to handle tickets. This ensures that ticket response and resolution times align with operational hours, providing accurate metrics.

- **Example:** If a ticket is received at 8:00 AM and business hours begin at 9:00 AM, the response time calculation starts at 9:00 AM.
-

Difference Between Business Hours and Calendar Hours

Aspect	Business Hours	Calendar Hours
Coverage	Limited to specific working hours, such as Mon–Fri, 9 AM–6 PM.	Tracks time continuously, 24/7, without regard to team availability.
Ticket Tracking	Tickets are tracked only during defined working hours.	Tickets are tracked across all hours, including nights and weekends.
Applicability	Ideal for teams with fixed schedules and non-24/7 availability.	Suitable for 24/7 operations or global support teams.
Impact on SLA Metrics	Ensures realistic tracking of response/resolution times.	Can result in unrealistic SLA breaches for non-working hours.

Task: Configure Business Hours for Mon–Fri, 9 AM–6 PM

1. **Access Zoho Desk Setup**
Log in to Zoho Desk and navigate to **Setup > Business Hours**.
2. **Define Custom Hours**
 - Add or edit business hours.
 - Set working hours as **Monday to Friday, 9 AM–6 PM**.
 - Ensure weekends (Saturday and Sunday) are left blank.
3. **Save and Apply**
Save the configuration to align ticket tracking with operational hours.

This setup optimizes ticket tracking and ensures service metrics are measured accurately within working hours.

Business Hour Name
Sales

Time Zone
(GMT -12:00) GMT-12:00 (Etc/GMT+12)

Specify the Operational Hours
Specify the operational hours of your organization so you can create SLA policies, Blueprints, and time-based automation based on them.

☐ Always (24x7) ☒ Specific Hours ☐ Custom Hours

GMT	MONDAY 09:00 Hrs	TUESDAY 09:00 Hrs	WEDNESDAY 09:00 Hrs	THURSDAY 09:00 Hrs	FRIDAY 09:00 Hrs	SATURDAY 00:00 Hrs	SUNDAY 00:00 Hrs
12 AM							

Save **Cancel**

Business Hour Name
Sales

Time Zone
(GMT -12:00) GMT-12:00 (Etc/GMT+12)

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12 AM							

Save **Cancel**

Here is your Smart Chat (Ctrl+Space)

Live Chat

Work Sample: SLA Compliance Based on Business Hours

Scenario:

A ticket was raised on Friday at 5 PM. Will it breach a 24-hour SLA by Monday at 10 AM if business hours are Monday–Friday, 9 AM–6 PM?

Analysis:

- Ticket Submission:** Friday at 5 PM.
- Remaining Hours on Friday:** Only 1 business hour remains (until 6 PM).
- Weekend Pause:** SLA clock pauses on Saturday and Sunday (non-business days).
- Clock Resumes:** SLA countdown continues at 9 AM on Monday.
- Final Calculation:**
 - 1 hour counted on Friday.
 - 23 hours remain, starting from Monday at 9 AM.

- By Monday at 10 AM, the SLA has not been breached, as 23 hours are still within the SLA limit.

Conclusion:

The 24-hour SLA is based on active business hours. Since weekends are excluded, the SLA remains compliant by Monday at 10 AM.

Work Sample: Configuring Assignment Rules in Zoho Desk

Definition

Assignment Rules in Zoho Desk automate ticket routing to ensure efficient distribution among agents. They streamline operations by assigning tickets based on predefined criteria, enhancing response time and accuracy.

Direct Assignment

This rule assigns specific types of tickets directly to designated agents, bypassing other distribution methods like round-robin.

Best Use Case:

When certain agents specialize in specific issues, such as technical support or billing queries. For example, a rule named "Support" ensures all support-related tickets are routed directly to the support team.

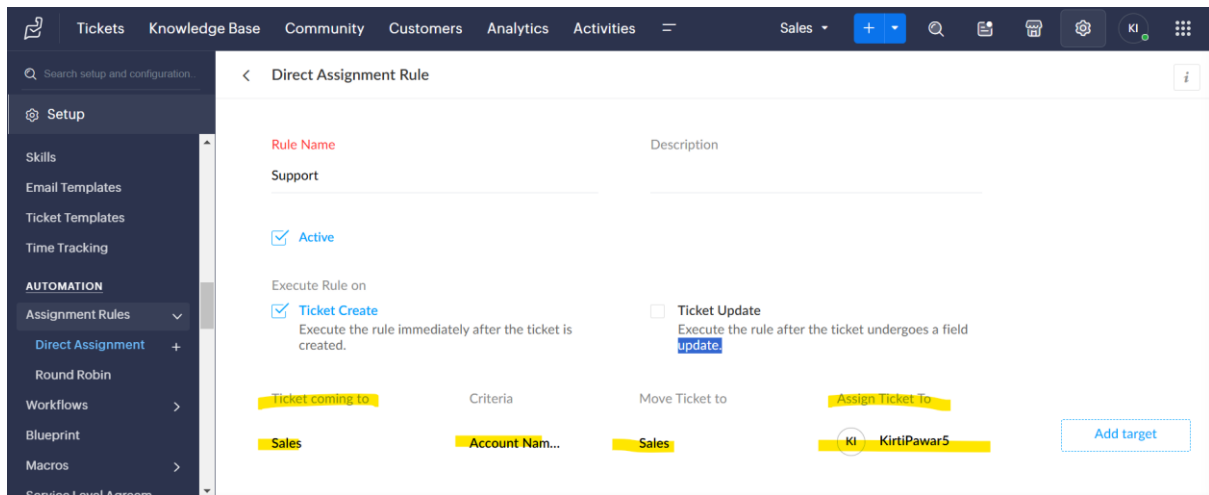
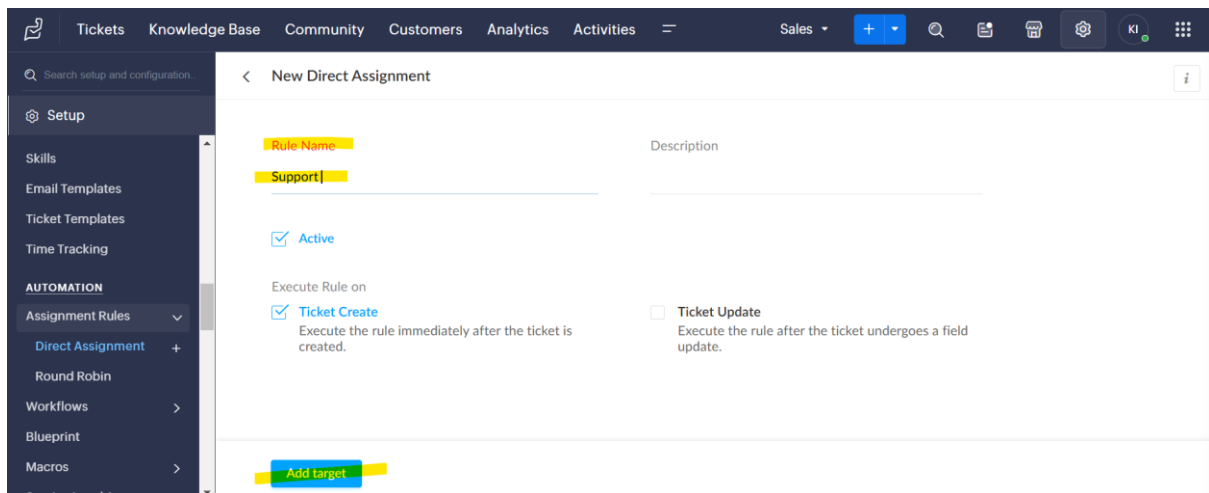
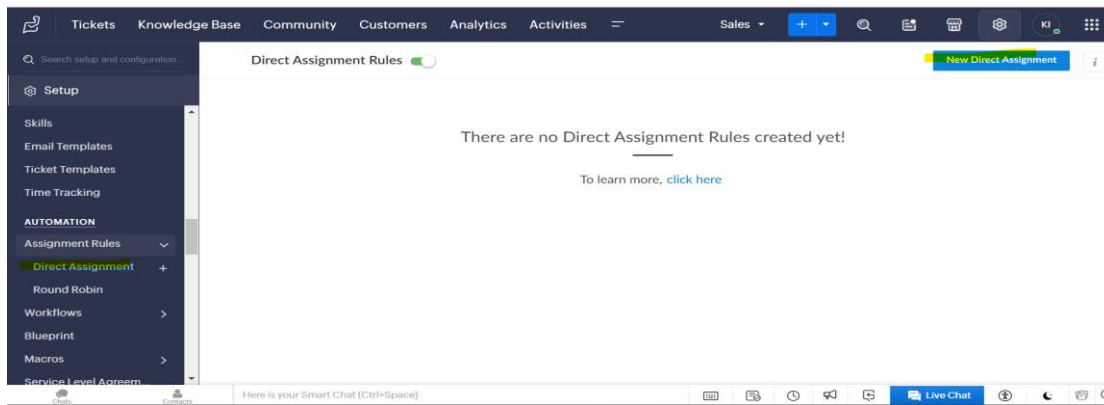
Advantages:

- Ensures tickets are handled by the most qualified agents.
- Reduces delays in ticket resolution.

Steps to Configure:

1. Navigate to **Automation > Assignment Rules**.
2. Select **New Direct Assignment**.
3. Define criteria (e.g., ticket type: "Support").
4. Assign tickets to a specific agent or team.
5. Save and activate the rule.

This setup ensures specialized queries are addressed efficiently by the right agents.



Configuring Round-Robin Assignment in Zoho Desk

Overview

Round-robin assignment ensures efficient ticket distribution across agents, balancing workload and leveraging expertise. It offers three modes tailored to various scenarios:

1. Load-Based Assignment

Tickets are distributed based on a maximum limit per agent.

Use Case: Prevent agents from being overloaded. Example: If the limit is 10 tickets, the first agent to log in gets 10 tickets. Remaining tickets stay unassigned until others log in.

2. Sequential Assignment

Tickets are distributed in a repeating order among agents.

Use Case: Ensures balanced workload distribution. Example: Tickets are assigned to Agent 1, Agent 2, Agent 3, and Agent 4 sequentially, cycling back to Agent 1 once all agents have received a ticket.

3. Skill-Based Assignment

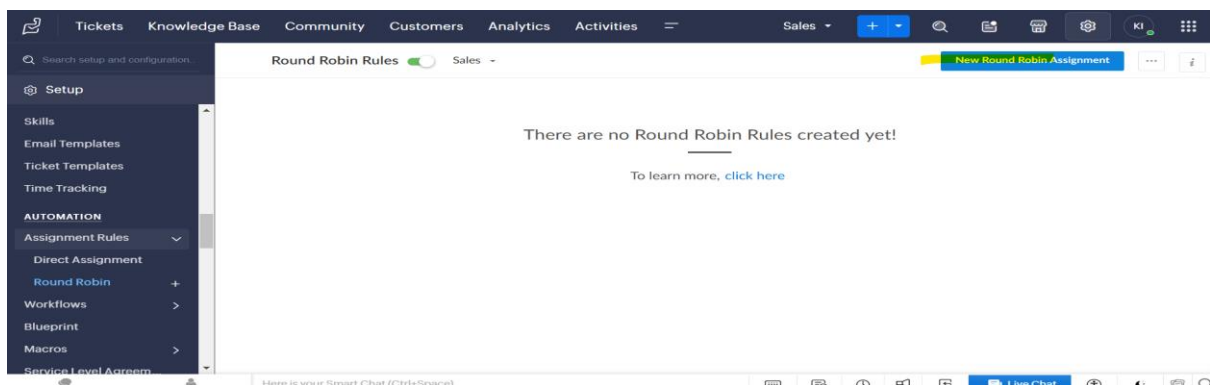
Tickets are routed based on agent expertise.

Use Case: Matches tickets to the most qualified agent. Example: "Refund" tickets go to agents with refund expertise, while "Technical Support" tickets are assigned to agents skilled in tech support.

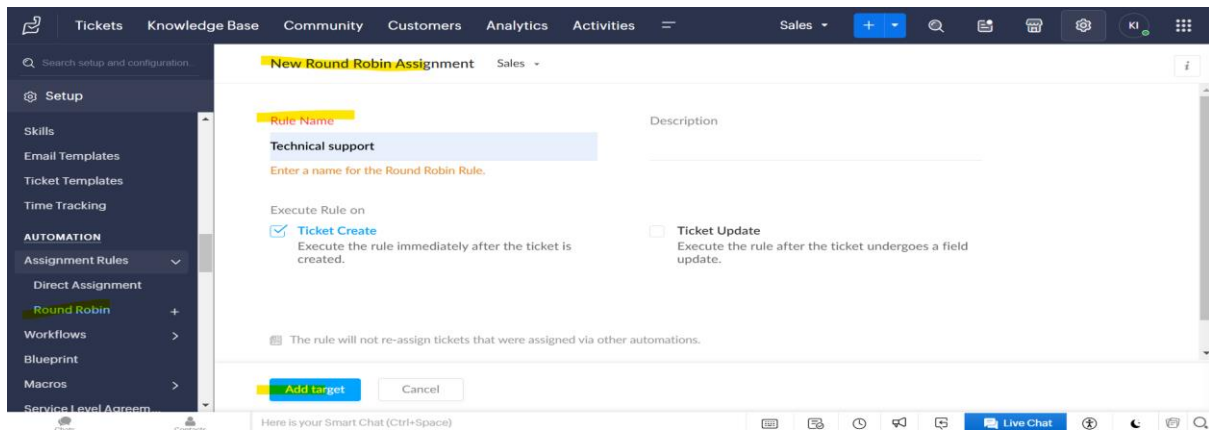
Steps to Configure Round-Robin Assignment

1. Navigate to **Automation > Assignment Rules**.
2. Select **New Round-Robin Assignment**.
3. Choose a mode (Load-Based, Sequential, or Skill-Based).
4. Define criteria and assign tickets accordingly.
5. Save and activate the rule.

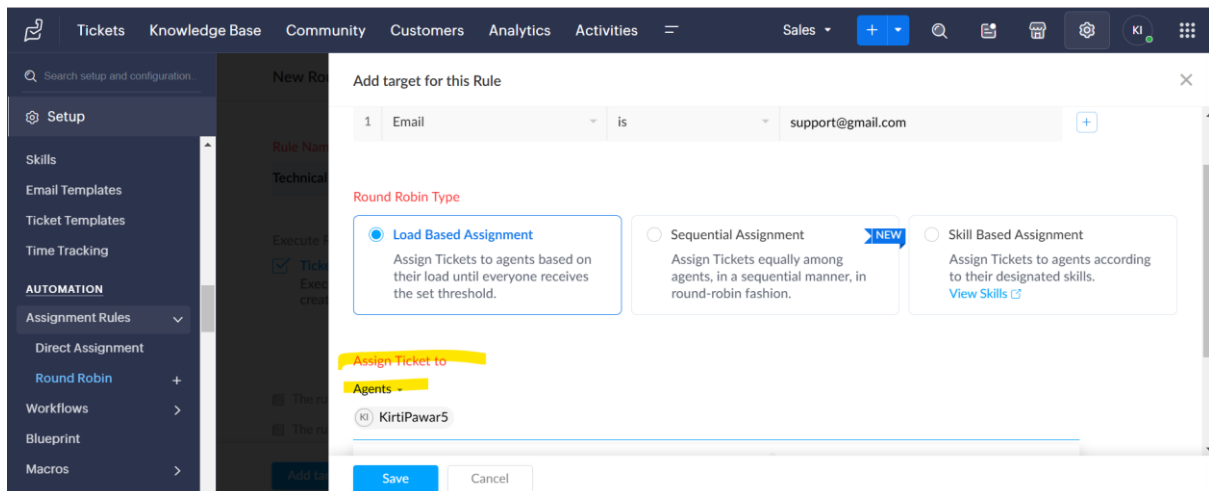
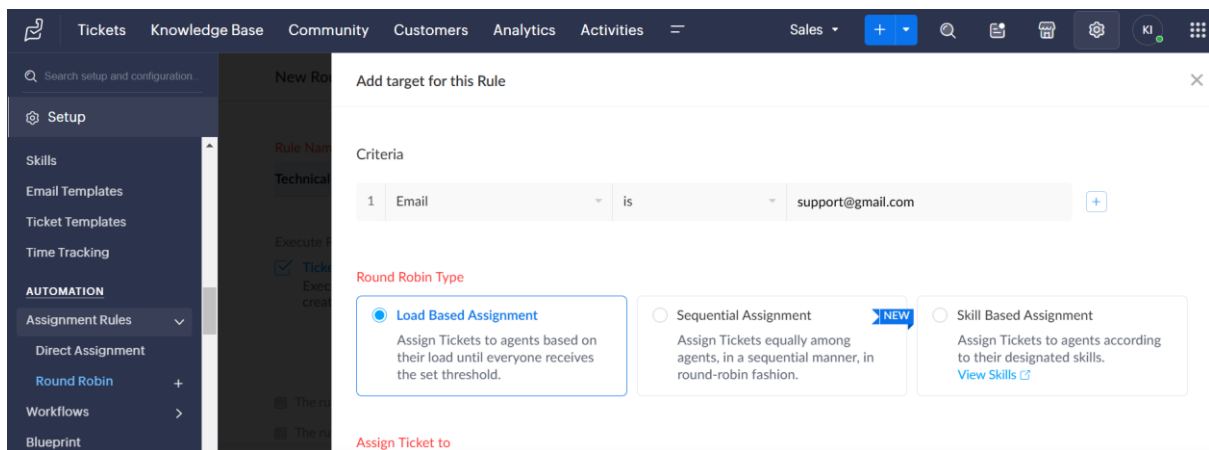
This ensures tickets are routed efficiently, optimizing agent productivity and customer satisfaction.

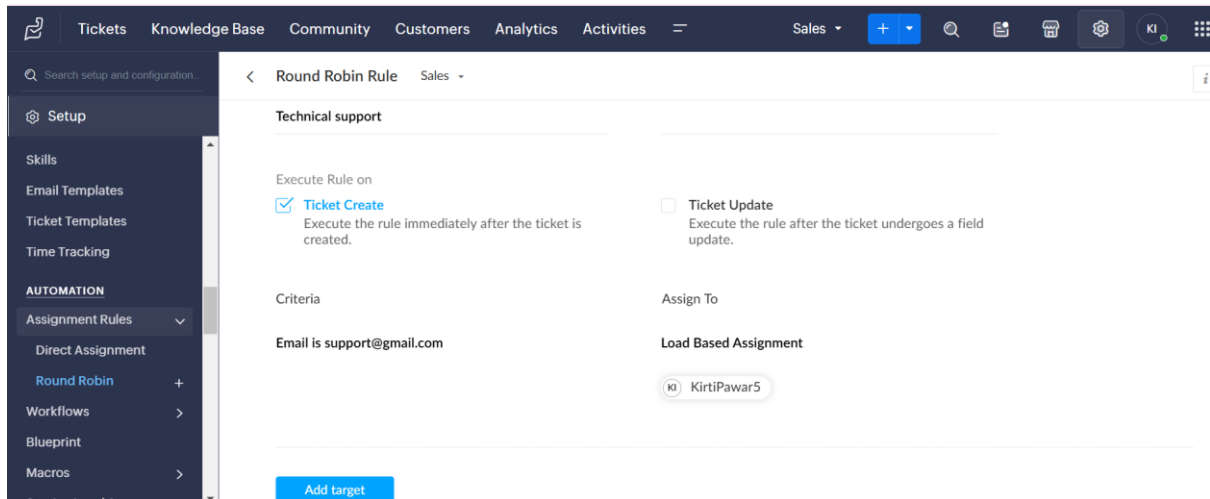


Add Rule Name-> Click on Add Target->



Select Criteria-> Select type e.g. Load Based Assignment-> Assign ticket to agent as shown below and save changes.





Work Sample: Configuring and Comparing Assignment Rules in Zoho Desk

Understanding Assignment Methods

1. Round-Robin Assignment:

Tickets are distributed evenly among agents based on predefined patterns:

- **Load-Based:** Limits the maximum tickets per agent.
Example: If the limit is 10 tickets, Agent 1 receives 10 tickets upon logging in. If there are 15 tickets, 5 remain unassigned until another agent logs in.
- **Sequential:** Assigns tickets in a repeating order across agents.
Example: For 4 agents, Ticket 1 goes to Agent 1, Ticket 2 to Agent 2, and so on. The fifth ticket circles back to Agent 1.
- **Skill-Based:** Matches tickets to agents with specific expertise.
Example: Refund-related tickets are routed to agents specializing in "Refunds," while technical issues are assigned to "Tech Support" specialists.

2. Direct Assignment:

Assigns specific tickets directly to designated agents, bypassing round-robin methods.

Example: All tickets tagged "Support" are routed to a specialist, ensuring priority handling.

Practical Configuration: Assigning Tickets to Technical Support

Scenario: Assign tickets for "Technical Support" to the agent with the least load.

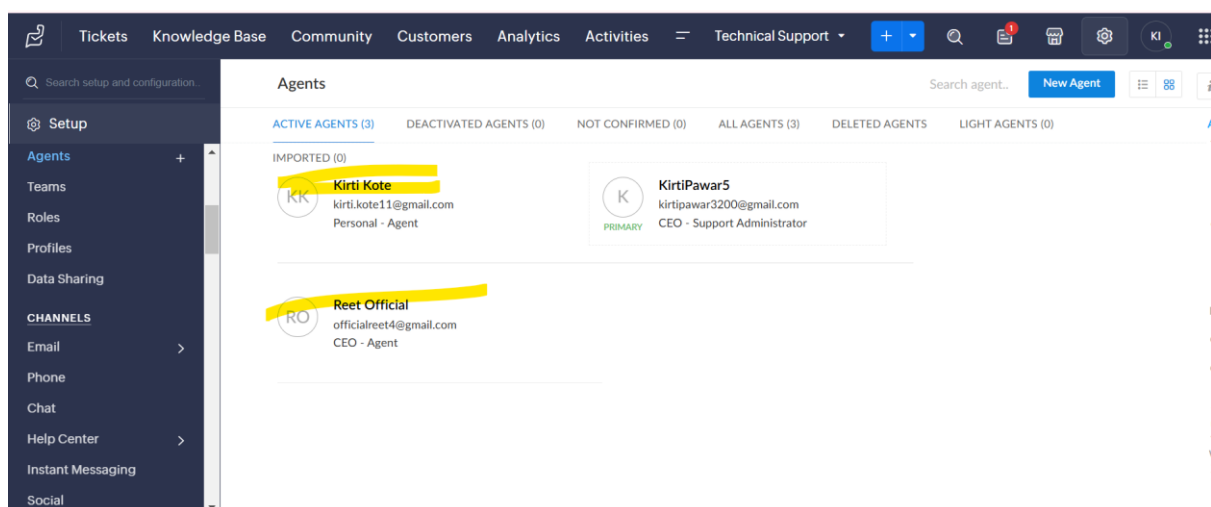
Steps to Implement:

1. Navigate to Setup > Automation > Assignment Rules.
2. Select New Assignment Rule and choose Load-Based Assignment.
3. Add Criteria: Ticket type = "Technical Support".
4. Assign tickets to the email ID: techsupport@kirtikote.zohodesk.in.
5. Activate the rule.

Department Setup:

- Created the "Technical Support" department.
- Added and activated two agents, assigning one as the Primary Agent.

This configuration ensures tickets are distributed efficiently, balancing workloads and leveraging expertise for optimal response times.



Edit Agent Information

Agent Information

First Name: Kirti

Last Name*: Kote

Email*: kirti.kote11@gmail.com

Status: Active

Department*: Click to select

TS - Technical Support

Save Cancel

Edit Agent Information

Agent Information

First Name: Reet

Last Name*: Official

Email*: officialreet4@gmail.com

Status: Active

Department*: Click to select

TS - Technical Support

Save Cancel

2. Pre-Configuration Settings

- Set the **Threshold per Agent** to '1'.
- Enabled the **Offline Agent** settings to handle agent availability.

Round Robin Rules Technical Support

Email Support
Email Support required

Round Robin Preferences

Round Robin auto assign tickets to agents who are Online for the Mail channel

Include Offline Agents: ☒

Ticket Threshold: ☒

Threshold Per Agent: 1

Assign Backlogs: ☒

Backlog Limit: ☐

Configuring Round Robin Assignment Rule

- Set up a **Round Robin Rule** for the "Technical Support" department to distribute workload evenly among agents.
- Defined the load-based assignment criteria:
 - **Description:** Contains "Email support required."
 - **Subject:** Contains "Email support."
- Configured the rule to assign tickets based on agent load.

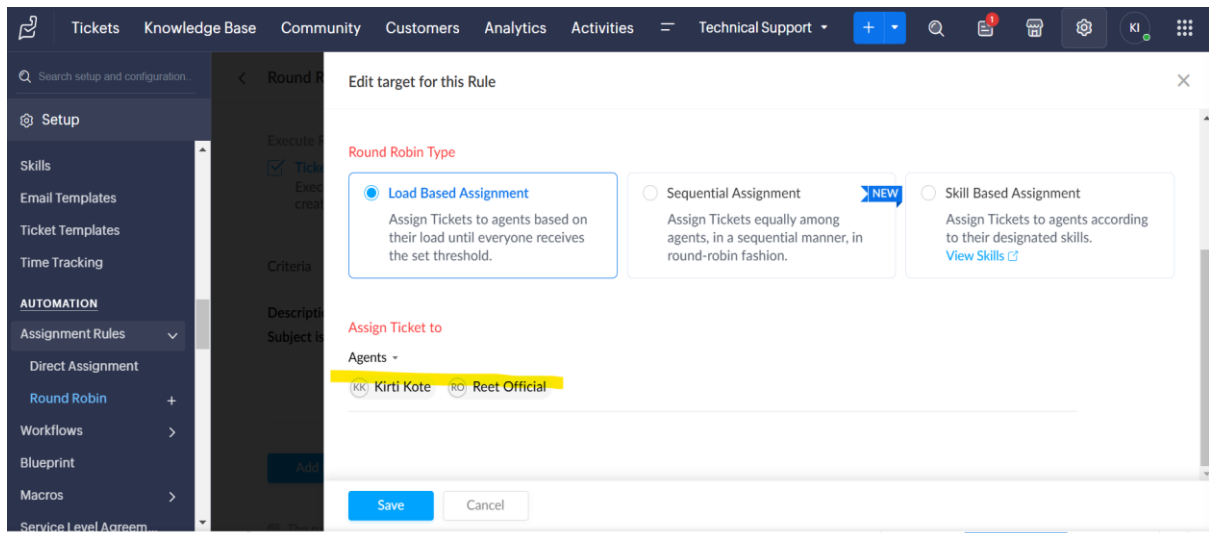
The screenshot shows the 'Round Robin Rule' configuration page for the 'Technical Support' department. The left sidebar contains navigation options: Setup, Skills, Email Templates, Ticket Templates, Time Tracking, and AUTOMATION. Under AUTOMATION, 'Assignment Rules' is expanded, showing 'Direct Assignment' and 'Round Robin' (highlighted). The main content area is titled 'Round Robin Rule' and includes the following fields:

- Rule Name:** Email Support
- Description:** Email Support required
- Execute Rule on:** ☒ Ticket Create (Execute the rule immediately after the ticket is created.) and ☐ Ticket Update (Execute the rule after the ticket undergoes a field update.)
- Criteria:** Description is Email support required (OR) Subject is Email support
- Assign To:** Load Based Assignment (with buttons for Kirti Kote and Reet Official)

The screenshot shows the 'Edit target for this Rule' dialog box. It contains the following information:

- Criteria:** A table with two rows: 1. Description is Email support required, 2. Subject is Email support. The criteria are connected by an OR operator.
- Criteria Pattern:** (1or2) Edit
- Round Robin Type:** ☒ Load Based Assignment (Assign Tickets to agents based on their load until everyone receives the set threshold.), ☐ Sequential Assignment (Assign Tickets equally among agents, in a sequential manner, in round-robin fashion.), and ☐ Skill Based Assignment (Assign Tickets to agents according to their designated skills. View Skills).
- Buttons:** Save and Cancel.

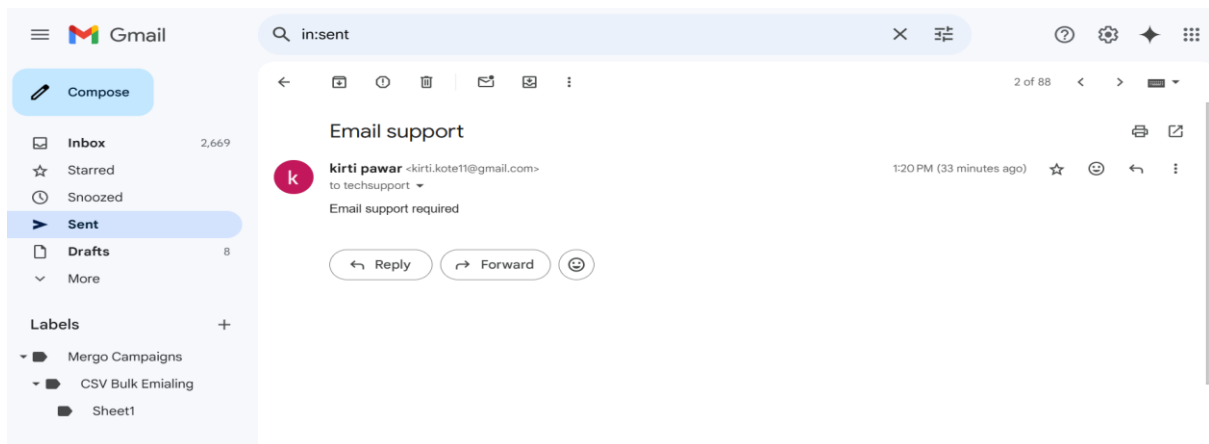
Applied the assignment rule and allocated tickets to **both agents** within the "Technical Support" department.



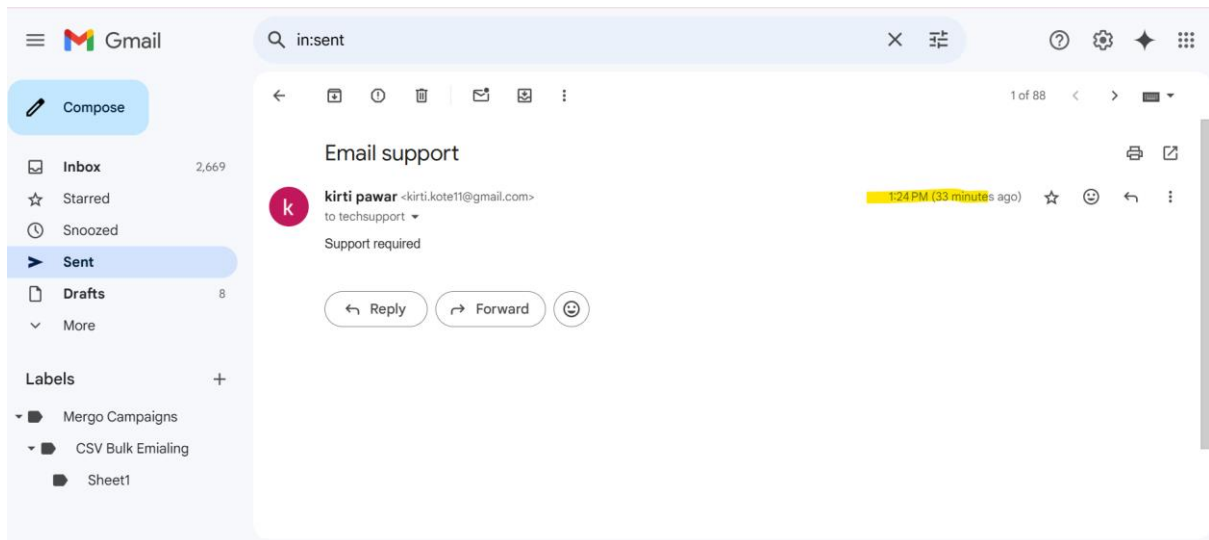
Testing the Assignment Rule

- Tested the rule by sending tickets from Gmail:
 - Sent test tickets to ensure each agent received **one ticket** as per the defined threshold.
 - Verified the ticket distribution:
 - **First Ticket:** Assigned to one Agent.
 - **Second Ticket:** Automatically assigned to the next agent in the department (Means as per load).

Gmail Copies:

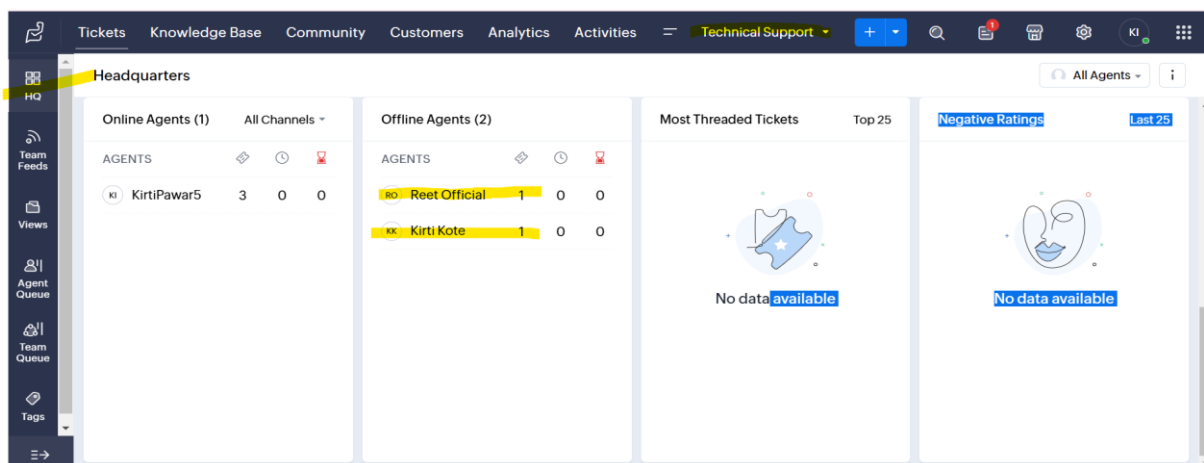


Sending another ticket to test.



Navigate to **Technical Support > Tickets > Headquarters**.

Verify that each agent has received one ticket as per the configured settings.



Outcome Analysis: Efficient Ticket Distribution in Zoho Desk

Summary:

The implemented assignment rule successfully distributed tickets using the Round Robin method with load-based criteria. The configuration demonstrated balanced workload distribution and ease of execution.

Key Outcomes:

- Tickets were evenly distributed among agents, adhering to the set threshold (1 ticket per agent).
- The rule proved effective, time-saving, and simple to implement.
- Load balancing was achieved, enhancing agent productivity and operational efficiency.

Steps Documented

1. **Agent Setup:**
 - Added agents to the "Technical Support" department and activated their accounts.
2. **Pre-Configuration:**
 - Set ticket threshold per agent to **1**.
 - Enabled offline agent functionality.
3. **Rule Creation and Application:**
 - Configured a Round Robin Rule with load-based criteria.
4. **Testing and Verification:**
 - Sent sample tickets via email to test functionality.
 - Verified ticket assignment under **Technical Support > Tickets > Headquarters**.

Final Outcome:

The rule worked seamlessly, ensuring even distribution of tickets among agents based on workload, leading to an efficient and optimized ticket assignment process.