Work Sample: Setting Up Custom SMTP in Zoho Desk

Objective:

Configure and verify a custom SMTP setup for a Gmail server in Zoho Desk to ensure seamless email communication.

Steps Taken:

1. **Navigating to Email Settings:**

   o Accessed the **Email** section in Zoho Desk.

   o Selected **From Address** and created a new custom email address.

2. **SMTP Server Configuration:**
   Configured the following settings for Gmail:

- **SMTP Username:** Same as the "From" address.

- **SMTP Server Address:** smtp.gmail.com.

- **Port:** 587.

- **Encryption:** TLS.

3. **Generating SMTP Password in Gmail:**

• Enabled **Two-Step Verification** in the Gmail account for added security.

• Generated an **App Password** under Gmail security settings.

• Used the generated 16-digit password in the SMTP configuration within Zoho Desk.
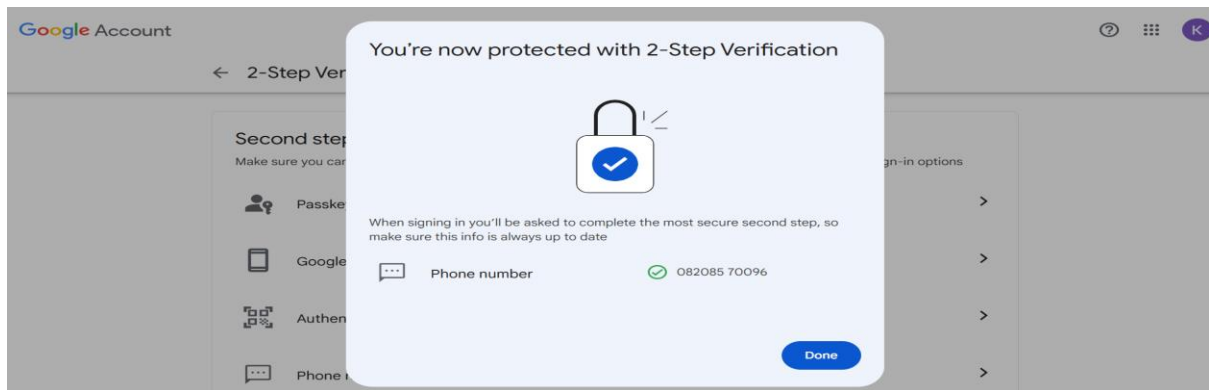
Enable two-step verification.
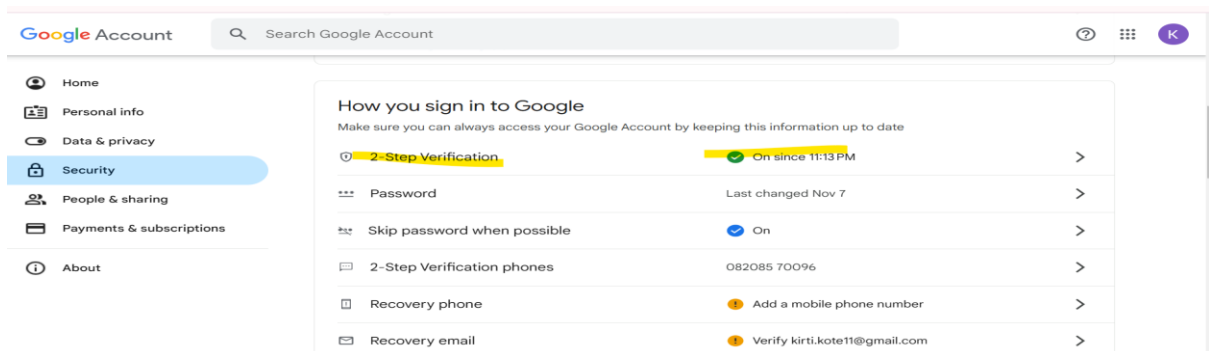
Generate a password using **'App Passwords'** option.
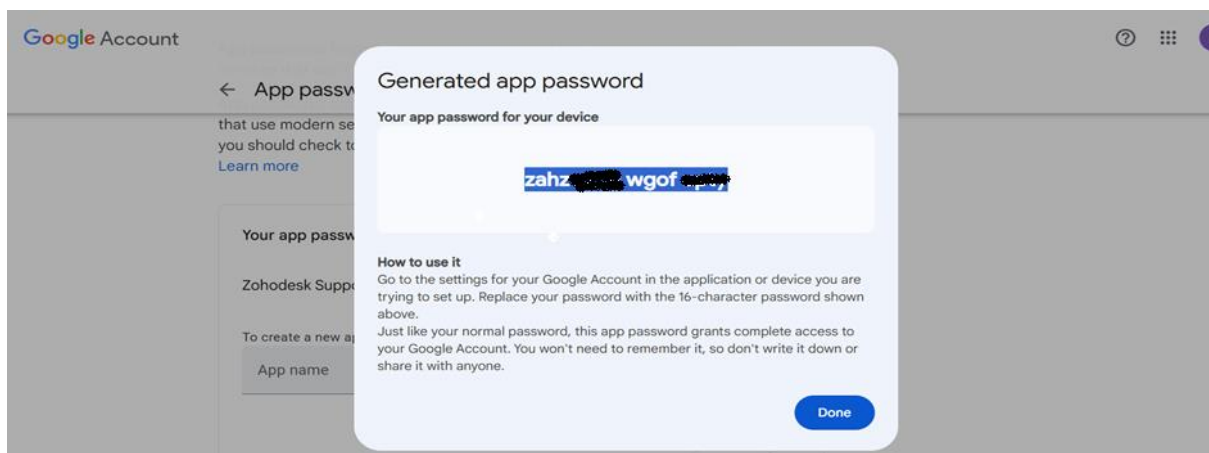
Enter this password in Zoho Desk in the **SMTP Password** field. (16-digit password)

After entering the password and email address, the **custom SMTP** is reflecting successfully.
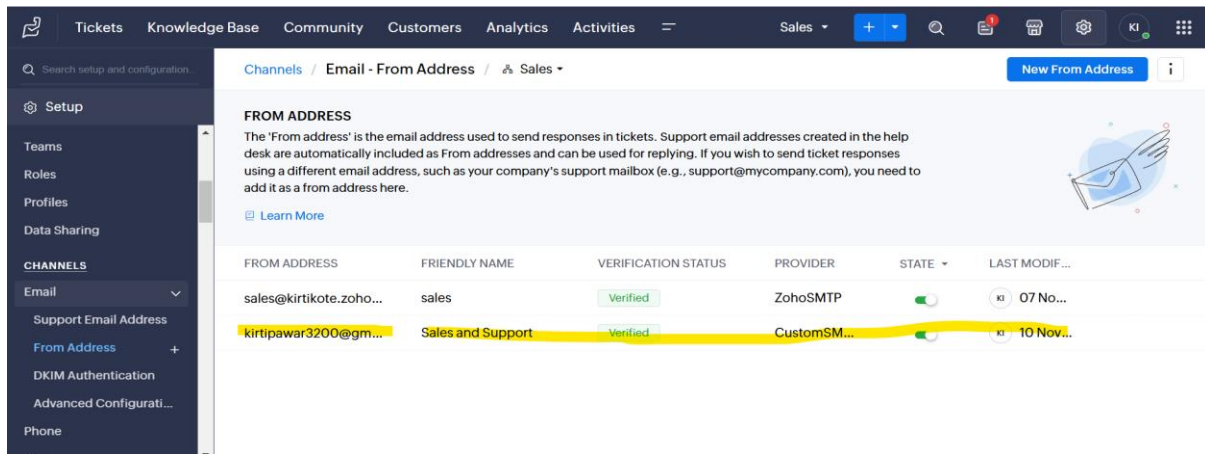
4. **Verification of Custom SMTP Setup:**

   o **Sent a test email using Zoho Desk.**

   o **Verified the email was sent via the configured Gmail account and reflected in both Zoho Desk and Gmail.**

Test Email Confirmation:

For example, I have the following ticket from the customer (kirti.kote11@gmail.com) in Zoho, with a copy in Gmail as shown below:
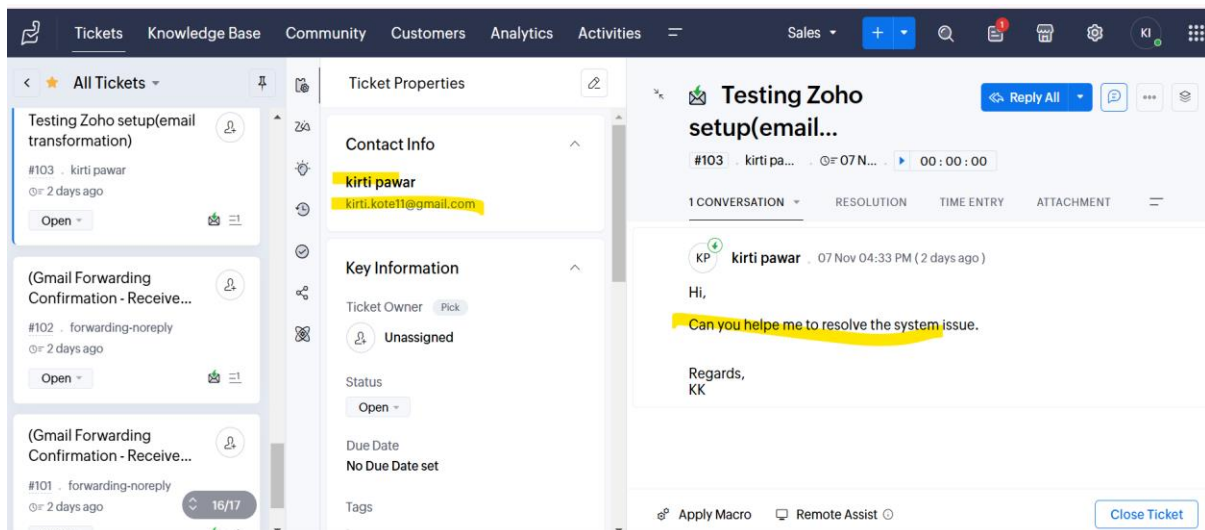
Gmail Copy:
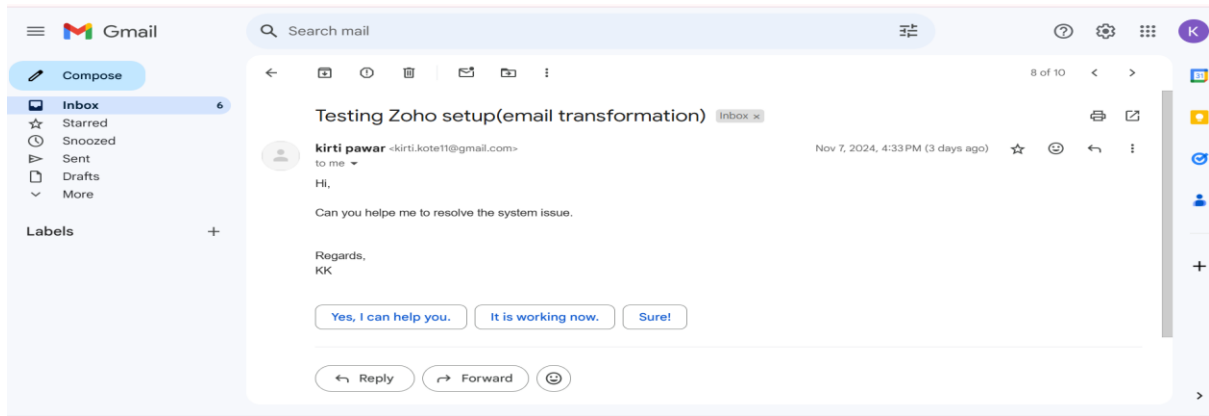
For example, I am sending this response to the customer through the Zoho account. (Type the response and send)
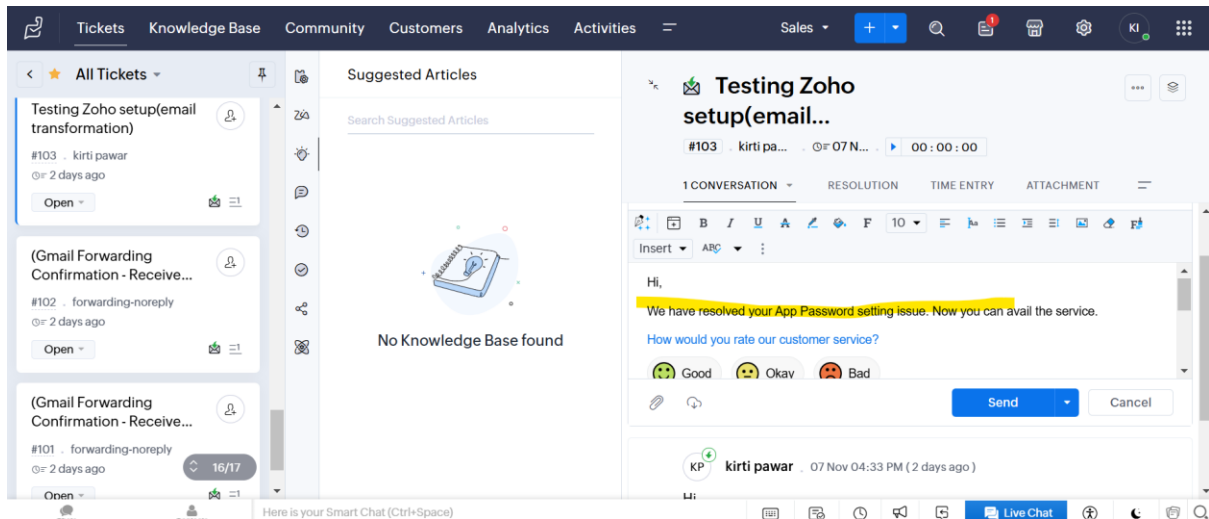
I can see the same mail has gone through my Gmail account also (As an Agent).

Gmail Copy:
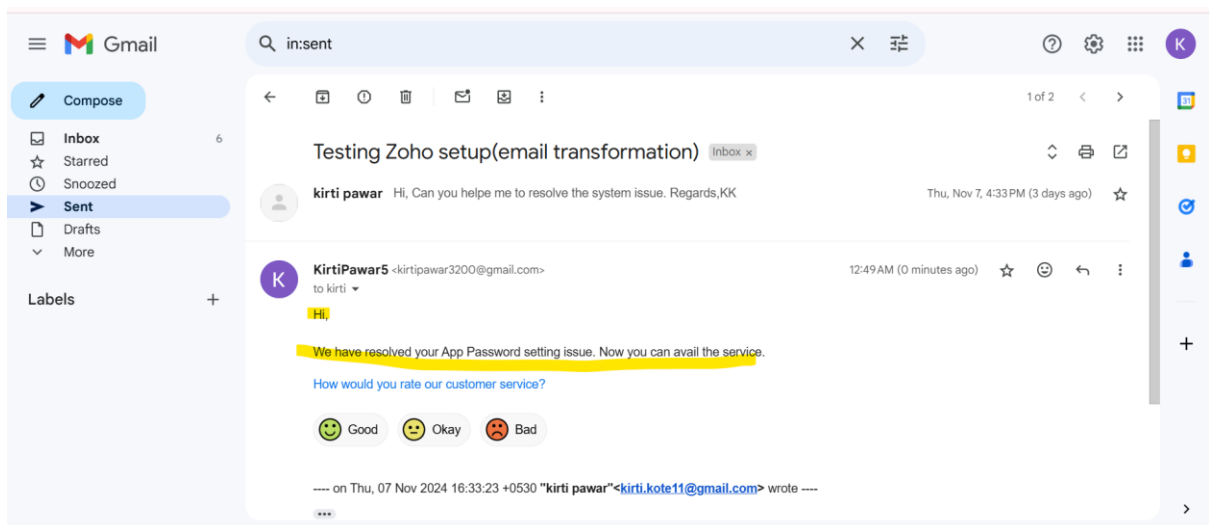
Now verifying, how the customer is receiving responses (logged in as a customer). Although we sent a reply through Zoho Desk, the customer received it through Gmail(kirtipawar3200@gmail.com).
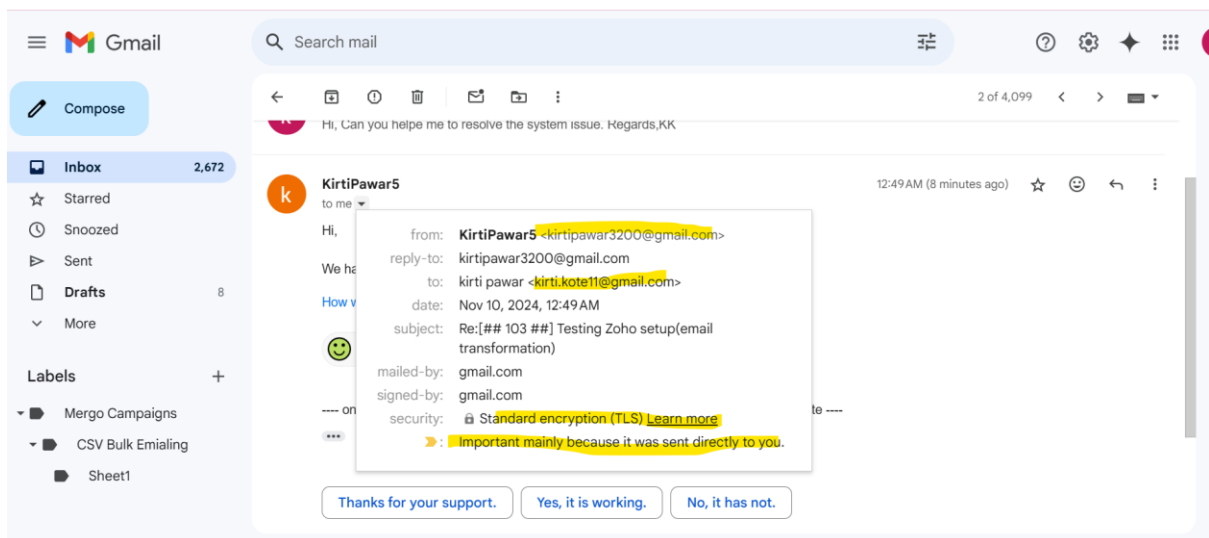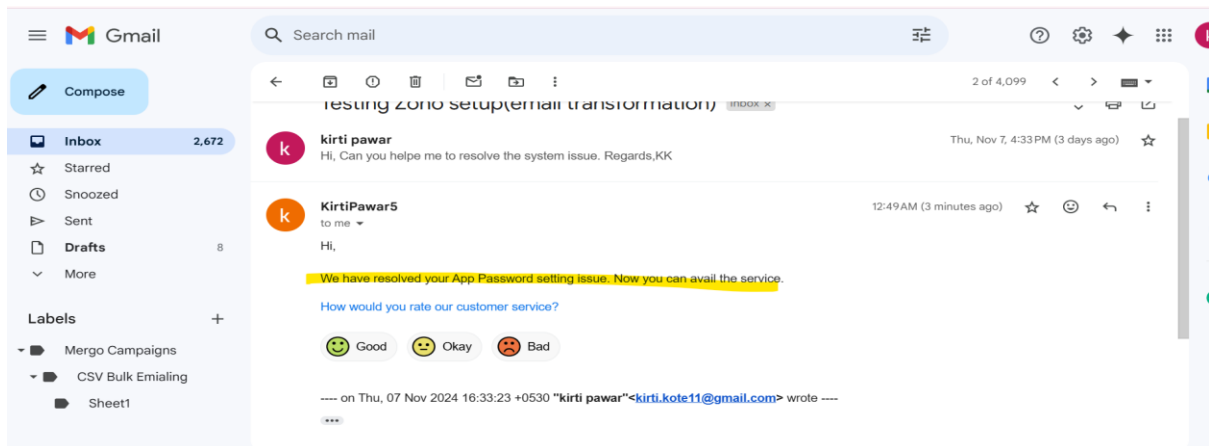
I have a sample ticket available to demonstrate how tickets are sent to customers through Zoho Desk prior to configuring these settings. It was going through Zoho desk mail id as below.

Results:

The test email was successfully sent, confirming that the SMTP server configuration and Gmail security settings were correctly set up. No errors were encountered during the process, and the email configuration has been verified as successful based on the test email and screenshots.

Work Sample: Sharing Tickets Across Departments in Zoho Desk

Objective:

Demonstrate the process of sharing tickets between departments with specific access permissions to streamline collaboration**.**
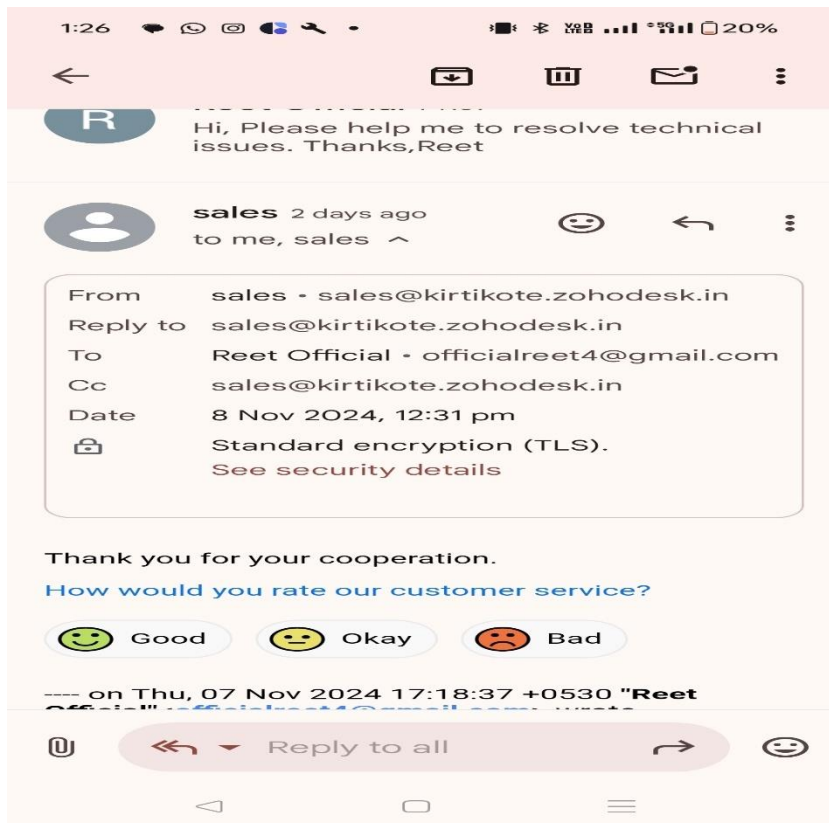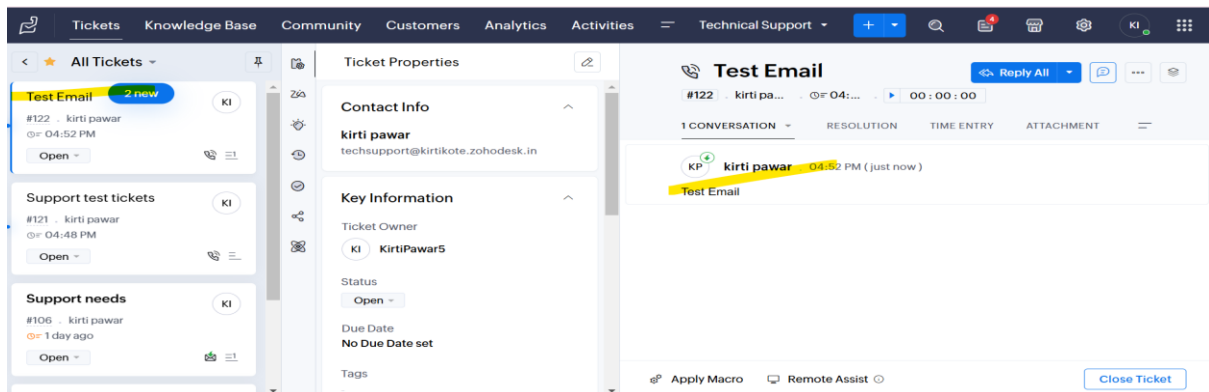
Scenario:

The Support Department needs to share a ticket with the Finance Department while controlling the level of access.

Steps Taken:

1. **Creating a Test Ticket:**

o   A test ticket was created under the Technical Support Department.

A **test emai**l was created under the **Technical Support** Department.

2. **Sharing the Ticket:**

•   Clicked on the Share icon within the ticket.

•   Selected the Finance Department as the recipient.

To share tickets with the **Finance** department, click on the **Share icon** and **select the desired department.**
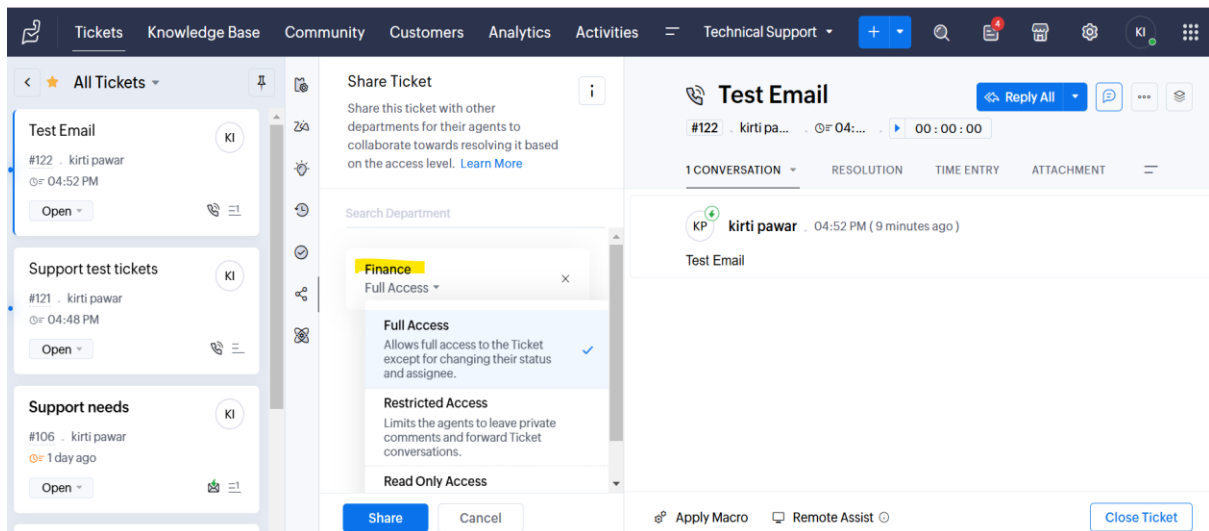
3. **Granting Read-Only Access:**

•   Assigned Read-Only Access, allowing the Finance department to view the ticket without making edits.

•   Clicked Share to finalize.

After selecting the department, **grant read-only access** so the Finance department can view the ticket without editing it. Then, **click on Share**.
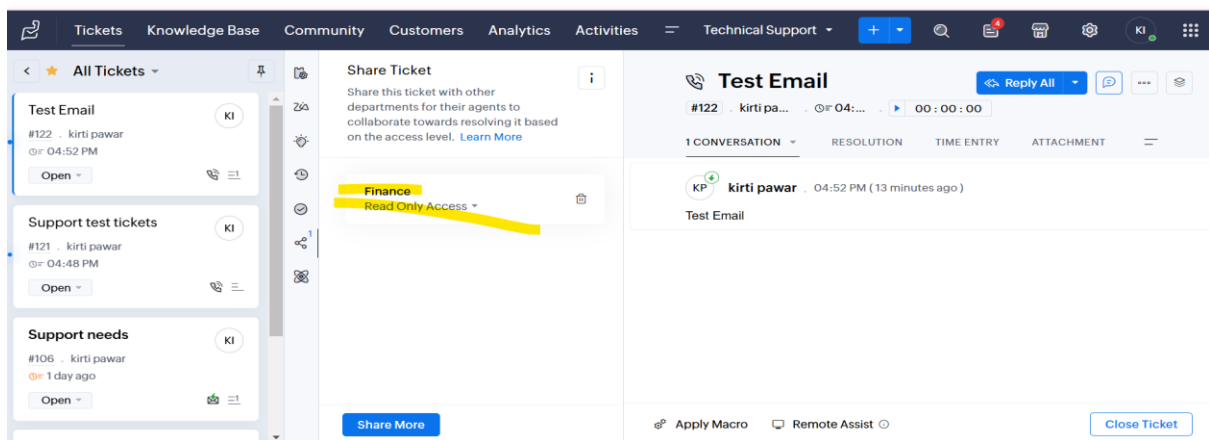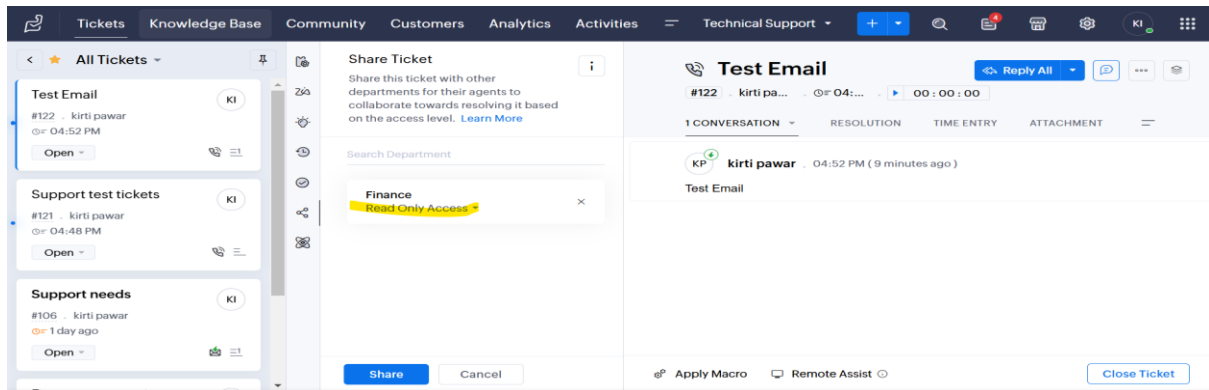

4. **Testing in the Finance Department:**

- Log into the Finance Department to verify the configuration.

- Observed that the ticket was visible with "Read-Only" permissions:

  o Able to view ticket details and comments.

  o Unable to edit any ticket information.

(Now, go to the **Finance** department to test the **configuration** and verify the access.)
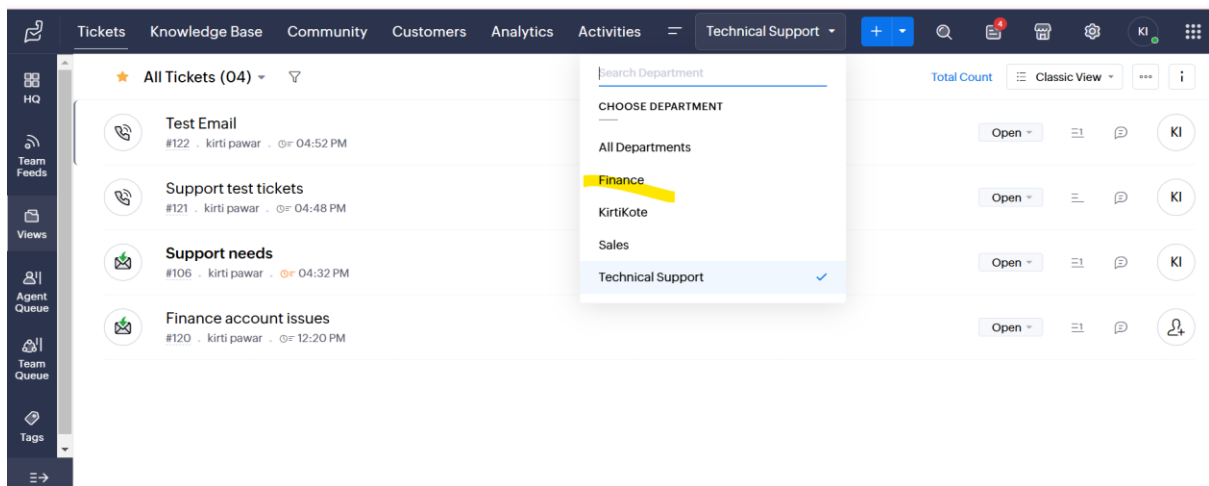
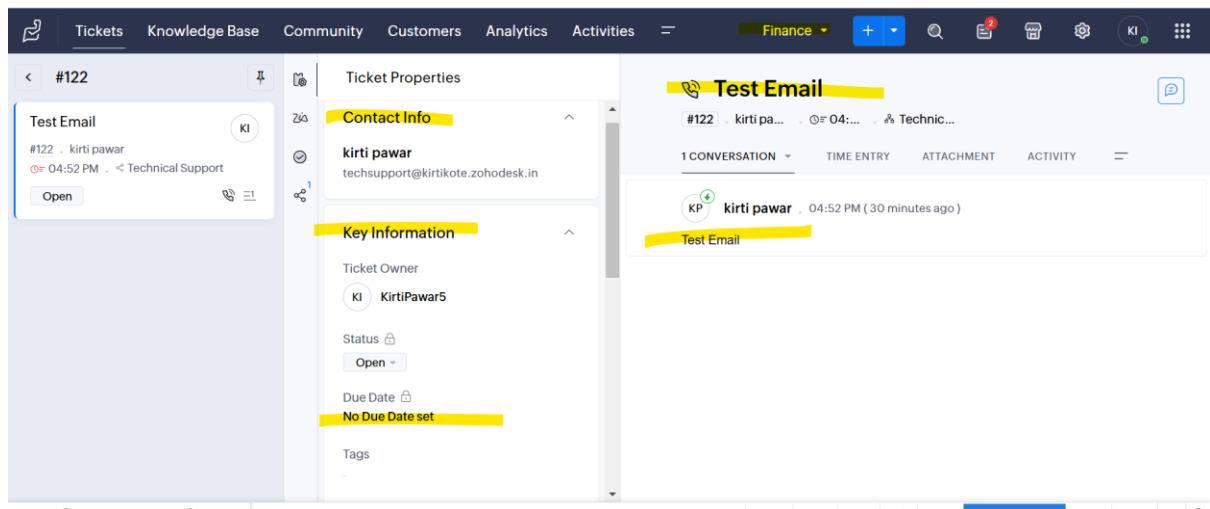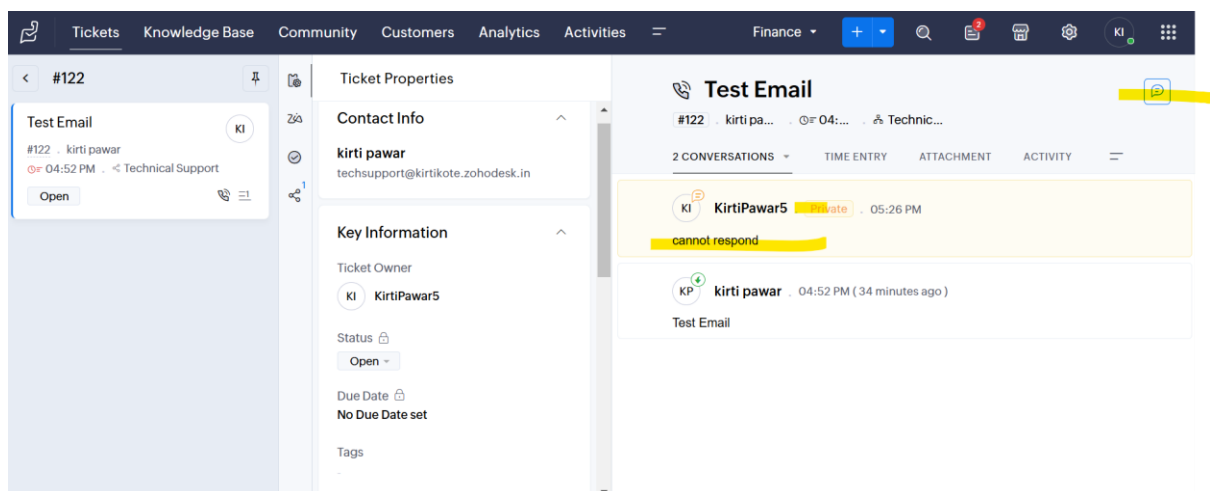In the Finance department, we received a ticket with all access **disabled** except for "**Read Only**." We can **view** the ticket information and leave comments, but we are **unable to edit any details** due to the "Read Only" access permissions.

Comments can be added and saved.

Observations on Access Types:

1. **Read-Only Access:**

   o Agents can view ticket details but cannot make changes or add comments.

2. **Restricted Access:**

   o Agents can view and add comments but cannot leave private notes or forward conversations.

3. **Full Access:**

   o Agents can manage most ticket details, except for changing the status or assignee.

Benefits of Ticket Sharing:

- **Enhanced Collaboration:**
  Departments can work together seamlessly by viewing shared ticket information.

- **Controlled Access:**
  Assigning appropriate access types ensures data security while enabling effective teamwork.

Why Access Type Matters:

Choosing the correct access type helps maintain ticket integrity and ensures that agents only perform actions necessary for their role. This prevents unauthorized changes while fostering efficient collaboration.