



Presented By:
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Agenda

- Introduction
- History
- Features
- User Interface
- Ticketing System
- Setup Module
- Zoho Desk APIs and SDKs



- Integration with Other Zoho Apps
- Customer Service Resources
- Zoho Desk Pricing & Editions
- Best - Practices
- Case Studies
- Comparison with other Help Desks
- Conclusion

Introduction

- Zoho Desk is a cloud-based help desk software that allows businesses to manage customer support interactions across multiple channels.



**Everything YOU
Need To Know About
Zoho Desk**

Z O H O

- Departments
- Ticket Management
- Knowledge Base
- Automation

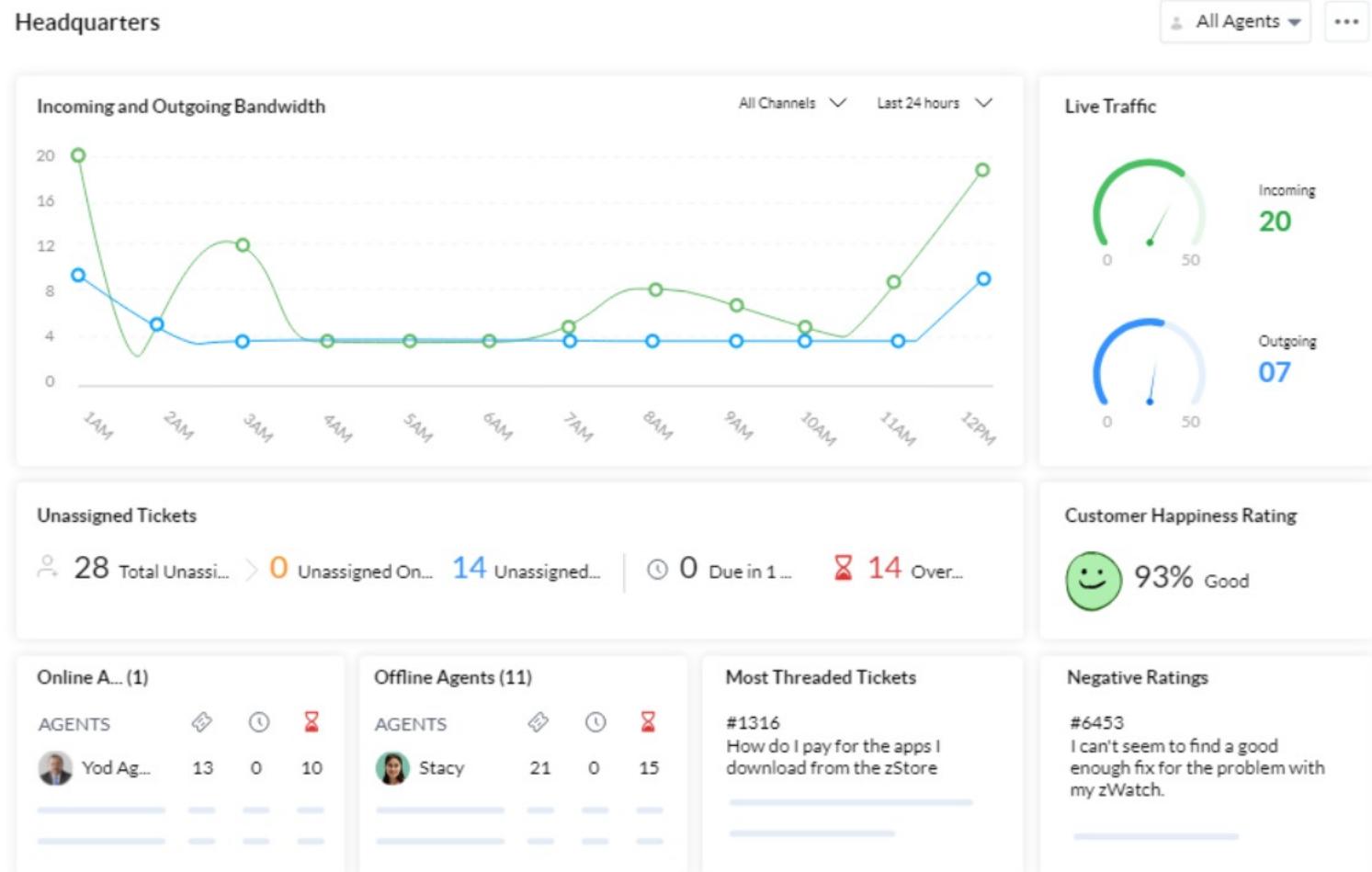


It consists of three parts:

1. Ticket Management
2. Automation Suite
3. Reporting and Optimization.



-
- 1. Ticket Management : Manage all your customer inquiries from various channels like email, phone, live chat, social media, and web forms in a single centralized platform.**



2. Automation Suite : Automate repetitive tasks like ticket routing, escalation, and follow-up emails to improve agent efficiency and ensure timely resolution.

< Direct Assignment Rule

Active

Execute Rule on

Ticket Create

Execute the rule immediately after the ticket is created.

Ticket Update

Execute the rule after the ticket undergoes a field update.

Ticket coming to

Abhyaz

Criteria

Email is hr@abhyaz.com

Move Ticket to

Talent Operations

Assign Ticket To

 Talent Ops

Talent Operations

To Address is hr-abhyaz@mtabte...

Talent Operations

 Talent Ops

Abhyaz

Subject contains internship (OR)

Subject contains leave application (OR)

Subject contains offer letter

Talent Operations

 Talent Ops

Abhyaz

Subject contains certificate,stipen... (OR)

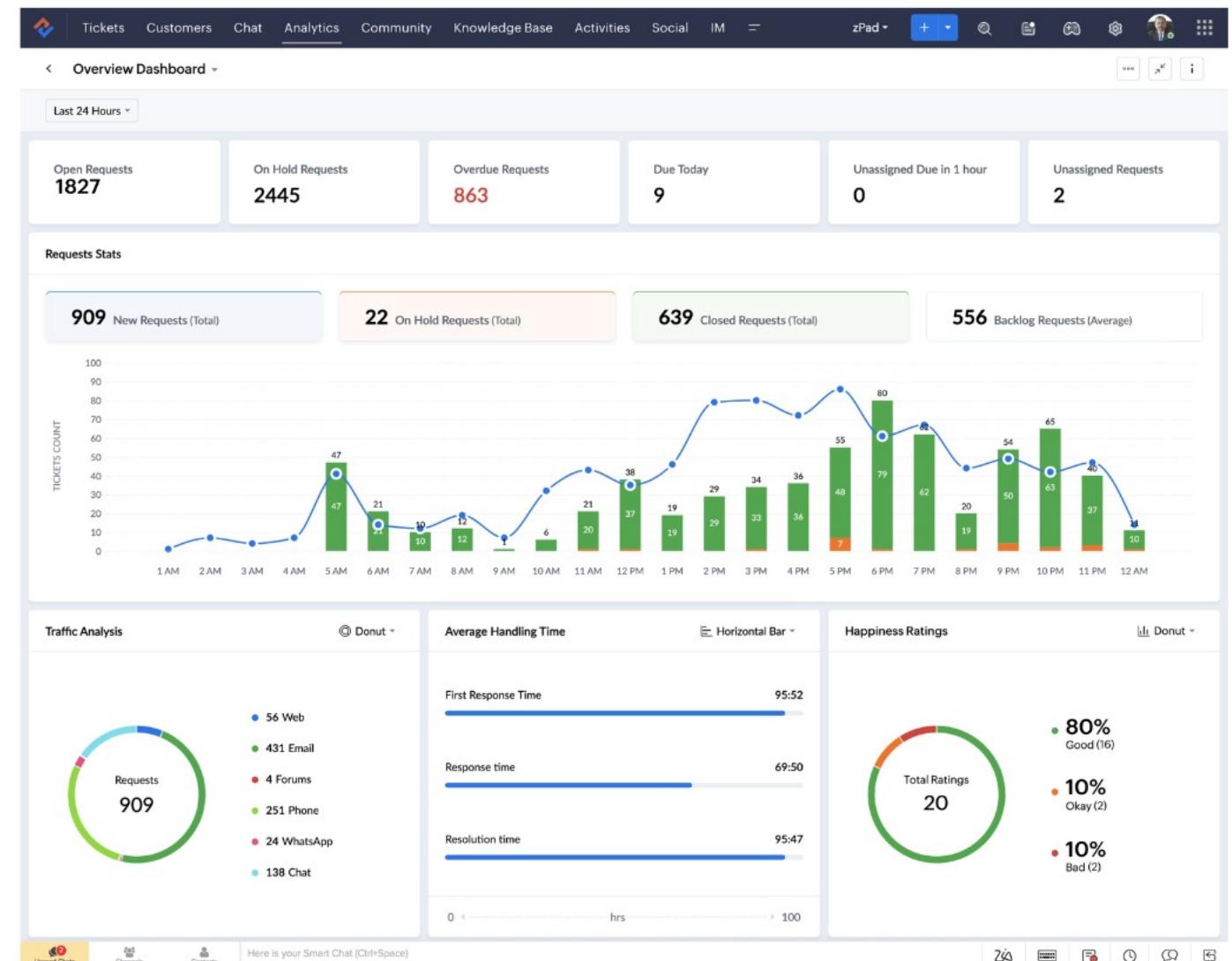
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Talent Operations

 Talent Ops

3. Reporting and Optimization :

Gain valuable insights into your customer service performance with comprehensive reports and dashboards.



History

- Zoho Corporation Private Limited is an Indian company that was founded in 1996 by Sridhar Vembu , Tony Thomas and Sreenivas Kanumuru in Chennai.
- It was initially named 'AdventNet', and the only service offered was Network Management. After it was renamed as Zoho Corporation in 2009.
- Zoho launched its help desk software, Zoho Desk, in 2016. It is used by more than 50K businesses worldwide.
- Additionally, it offers more than 55 products.



Ticket Management

Manage tickets and everything else in one place

Track customer requests across channels, brands, products, departments, and more.



Omnichannel

Be available for your customers, whatever channel of communication they choose.



Instant Messaging

Integrate your customer service with Popular Instant Messaging Channels.

New



Multi-brand Help Center

Create a distinct self-service portal for each brand's customers.



Social Media

Streamline your social media presence through your help desk.



Live Chat

Be available for your customers in an instant.

Very Popular



Web Forms

Gather vital information to deliver enhanced service experiences.



Multi-department

Organize your help desk to reflect your company's structure.



Email

Enable simple email communication, fuelled by context.

Unique to Zoho



Telephony

Here are good old phone conversations with a helping of context.

Great for large teams

Supercharge your team with contextual AI

Make your great support team even better with thoughtfully built AI.



KB Bot

Zia shares relevant solutions from your knowledge base directly with your customers.

 Very Popular



Auto-tag tickets

Zia identifies key aspects of a ticket and adds them as tags.



Sentiment Analysis

Zia dives into the feelings of every thread in a conversation.



Zia Notifications

Get notified every time there's unusual activity in your ticket stream.

 Very Popular



Zia Dashboard

Monitor vital Zia statistics from a unified screen.

 Great for large teams



Reply Assistant

Zia shows agents relevant solutions from the Knowledge Base to use in ticket responses.

 Unique to Zoho

Self-Service

Offer quick help for the DIY customer

Enable customers to find quick answers by themselves, wherever they are.



Guided Conversations

An easily configurable low code platform to build self-service experiences for customers and service teams.



Embeddable self-service

With the ASAP plugin, embed customer self-service capabilities into your websites and mobile apps.



Multi-brand help center

Create a distinct self-service portal for each brand's customers.



Community

Build and grow a community of customers, prospects, and visitors.



Knowledge Base

Create a repository of solutions for commonly asked questions.

Agent Productivity

Empower every agent to delight every customer

Here's everything your agents need to collaborate, communicate, and secure those customer relationships.



Work Modes

An award-winning system that automatically organizes open tickets to make agents more productive.

 Unique to Zoho



Reply Editor

Craft and send the best response using customer context, FAQs, templates, and more.



Teams

Make it easier for your employees to collaborate and work on customer tickets.



Ticketing efficiency

Use these small, handy tools to close more tickets faster.



Mobility

Manage tickets even when you're away from your desk.

 Very Popular



Accessibility Controls

Empower users of all abilities to work on tickets smoothly.



CRM integration

Zoho Desk + Zoho CRM: The most advanced customer management tools.

 Very Popular

Automation

Automate all your repetitive activities

Manage processes and automate repetitive activities to save time and effort.



Essentials

Manage all the little cogs and gears that make up the machine of your help desk.



Ticket Assignment

Ensure that every ticket is automatically assigned to an appropriate agent.



Notification rules

Inform customers and agents automatically about progress made on their tickets.



Blueprint

Manage complex cross-functional service processes efficiently.



Custom functions

Write custom code to connect modules and other software products.



SLAs & Escalations

Maintain service levels and escalate violations automatically.



Workflows

Write rules to update fields, send alerts, add tasks, and perform actions.



Layouts

Collect and store details related to service processes.



Very Popular



Great for large teams

Extensibility

Integrate customer service with the rest of your company

Get more out of Zoho Desk by connecting it with all the other software your team uses.



Extend

Customize and extend your help desk to suit the needs of your business.



Integrations

Connect Zoho Desk with other software your business uses.

 **Very Popular**



Custom functions

Use custom code to update details in other software based on updates in your tickets.



Blueprint

Manage complex cross-functional service processes efficiently.



APIs

Integrate Zoho Desk's modules with other services.



Marketplace and platform

Use extensions to embed interactive widgets into the Zoho Desk interface.



SDKs

Use Zoho Desk's powerful SDKs to build custom mobile apps.



Layouts

Collect and store details related to service processes.

Insights and Impact

Know what's working and what isn't

Get actionable insights into your team's performance through reports and dashboards.



Reports and Dashboards

Create reports and visualizations to monitor your team's performance.

 Very Popular



Time tracking

Keep track of time spent on every ticket and task.



Headquarters

A live dashboard that shows the big picture trends as well as finer details for managers.

 Unique to Zoho



Radar

A mobile app for the proactive, hands-on manager.

 Unique to Zoho

Customization

Set up Desk to fit your team perfectly

Customize not just how your help desk looks and feels, but also how it behaves.



Layouts

Collect and store details related to service processes.



Multi-brand help center

Create a distinct self-service portal for each brand's customers.



Status

Define every step a ticket takes, from creation to closure.



Templates

Create and use templates for ticket forms, emails, and notifications.



Rebranding

Get your help desk to match your brand personality.



Domain mapping

Make your help center an extension of your brand by mapping it to your own domain.

 Very Popular

 Very Popular

Security

Offer help securely

Protect your customers' data while giving your team the information they need.



Roles

Establish your organization's hierarchy for better data flow.

 Great for large teams



Profiles

Define what level of access different roles in your organization get.



Data sharing

Control who can access data within each module.



GDPR

Move one step closer to GDPR compliance with Zoho Desk.

 Very Popular

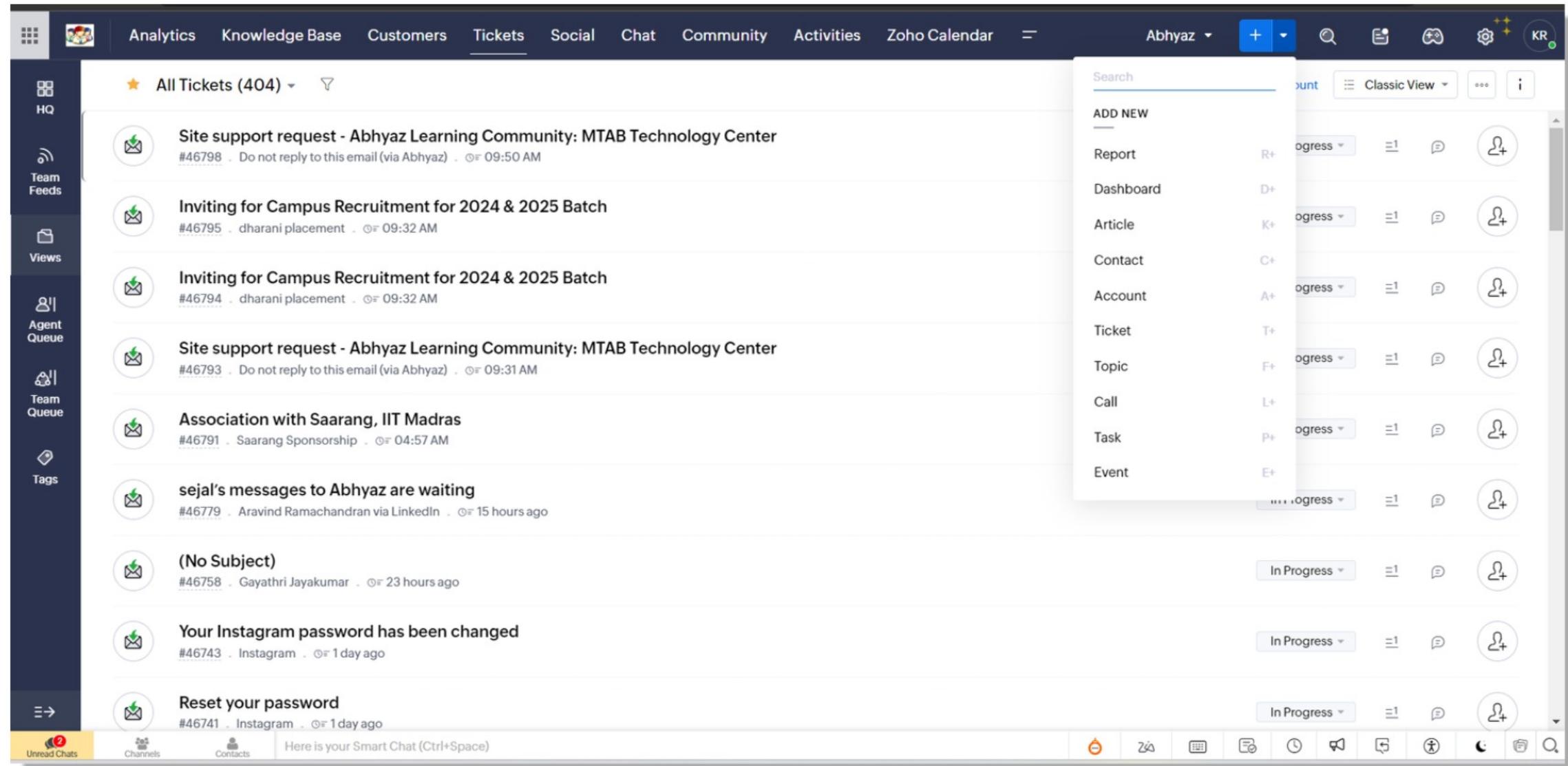


Field level security

Control who can view and modify the data in your help desk.

 Great for large teams

User Interface



The screenshot displays the Abhyaz user interface, specifically the Tickets module. The top navigation bar includes links for Analytics, Knowledge Base, Customers, Tickets (selected), Social, Chat, Community, Activities, Zoho Calendar, and a dropdown for 'Abhyaz'. The main content area shows a list of tickets under the heading 'All Tickets (404)'. The tickets listed are:

- Site support request - Abhyaz Learning Community: MTAB Technology Center #46798 . Do not reply to this email (via Abhyaz) . 09:50 AM
- Inviting for Campus Recruitment for 2024 & 2025 Batch #46795 . dharani placement . 09:32 AM
- Inviting for Campus Recruitment for 2024 & 2025 Batch #46794 . dharani placement . 09:32 AM
- Site support request - Abhyaz Learning Community: MTAB Technology Center #46793 . Do not reply to this email (via Abhyaz) . 09:31 AM
- Association with Saarang, IIT Madras #46791 . Saarang Sponsorship . 04:57 AM
- sejal's messages to Abhyaz are waiting #46779 . Aravind Ramachandran via LinkedIn . 15 hours ago
- (No Subject) #46758 . Gayathri Jayakumar . 23 hours ago
- Your Instagram password has been changed #46743 . Instagram . 1 day ago
- Reset your password #46741 . Instagram . 1 day ago

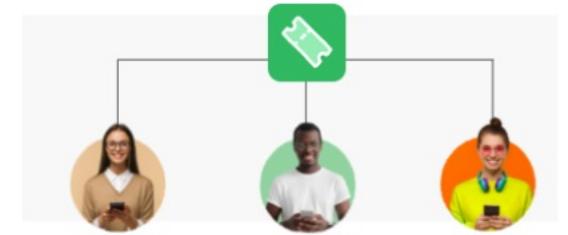
The right side of the screen features a sidebar with various options: Search, ADD NEW (Report, Dashboard, Article, Contact, Account, Ticket, Topic, Call, Task, Event), and a list of items in progress. The bottom navigation bar includes links for Channels, Contacts, and Smart Chat, along with a status message: 'Here is your Smart Chat (Ctrl+Space)'.

Ticketing System

Zoho Desk's ticketing system is designed to streamline the process of managing customer support inquiries and requests

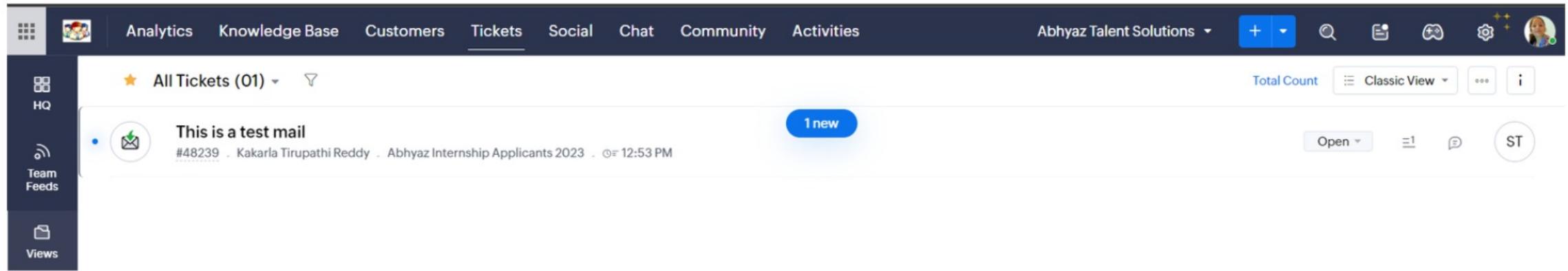
Here are some key features:

- **Multichannel Communication :** It accepts tickets from various channels, including email, web forms, phone calls, social media, and live chat.
- **Ticket Assignment:** You can automatically Assign tickets to the most qualified agents based on skills, workload, and other criteria.
- **User-Friendly Ticket Sorting.:** Ticketing software helps support agents decide which tickets to solve first. Automatic ticket views like [Work Modes](#) in Zoho Desk help sort tickets based on time due, priority, ticket status, and more. By this agents can respond to tickets faster and save a lot of time.



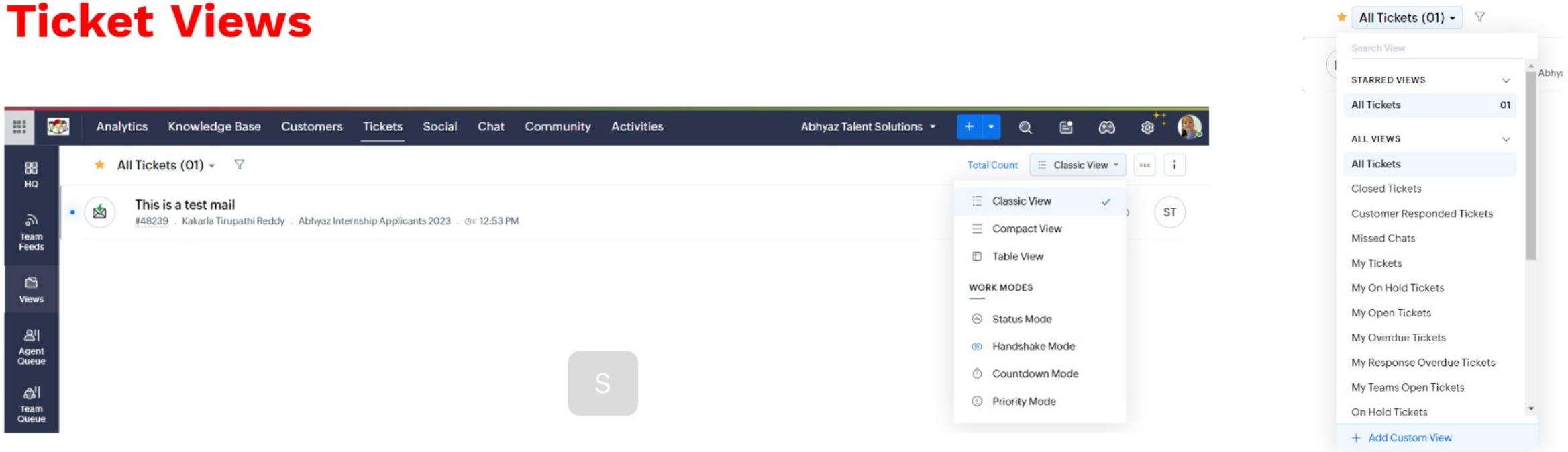
- **Knowledge Base and Community :** It allows you to set up a Help Center with a Knowledge Base and Community forums. This helps customers find answers to their questions without waiting for an agent to reply.
- **Reporting and Analytics:** It provides a variety of reports and analytics that can help you track your team's performance and identify areas for improvement.





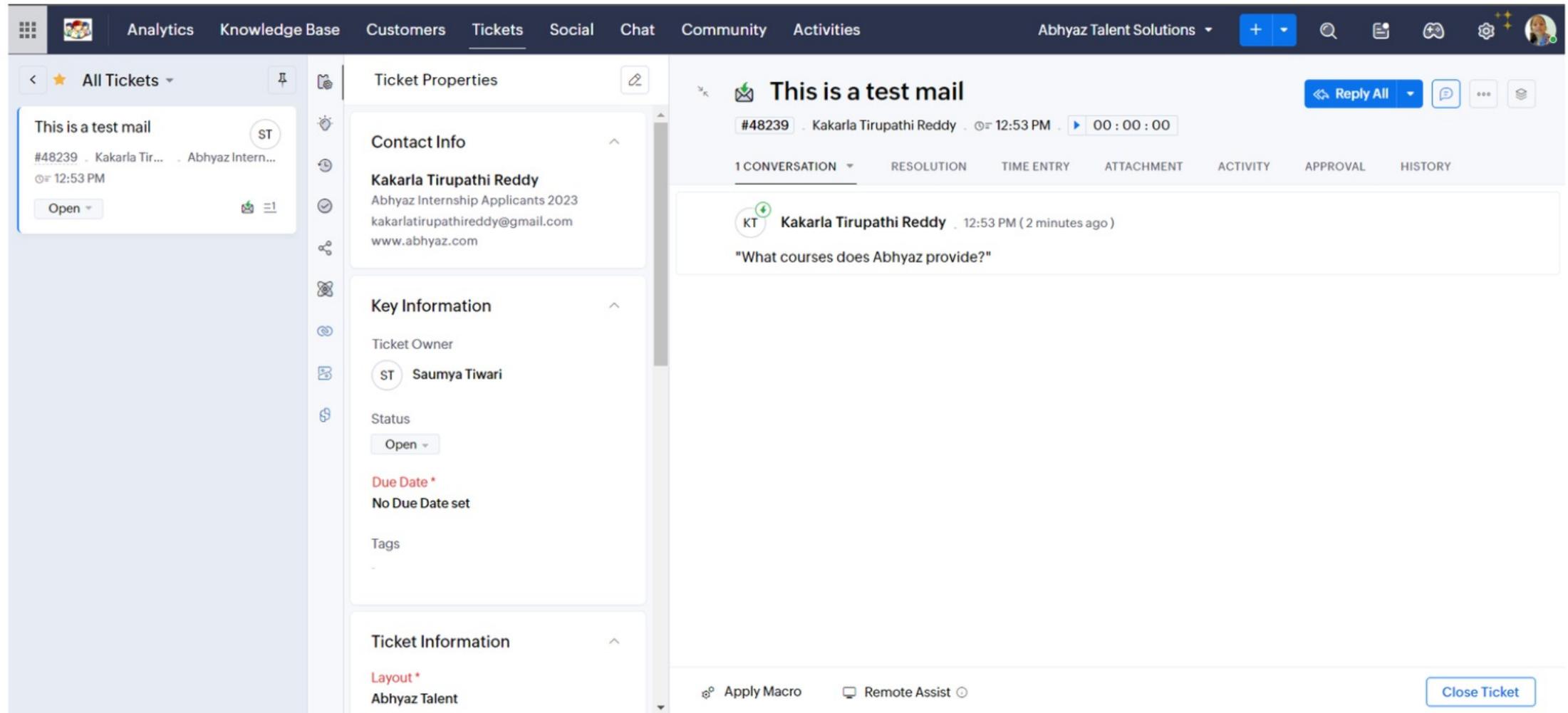
The screenshot shows the Abhyaz ticketing interface. The top navigation bar includes links for Analytics, Knowledge Base, Customers, Tickets (selected), Social, Chat, Community, Activities, and a dropdown for 'Abhyaz Talent Solutions'. The main content area displays a list of tickets under 'All Tickets (01)'. A single ticket is visible, titled 'This is a test mail' (Ticket #48239, Kakarla Tirupathi Reddy, Abhyaz Internship Applicants 2023, 12:53 PM). A blue button indicates '1 new'. On the far right of the ticket card are 'Open', 'ST', and other action buttons. The left sidebar features icons for HQ, Team Feeds, and Views.

Ticket Views



This screenshot shows the same interface as above, but with a detailed view of the 'Views' dropdown menu. The menu is open, revealing several options under 'STARRED VIEWS': 'All Tickets' (selected, count 01), 'All Tickets', 'Closed Tickets', 'Customer Responded Tickets', 'Missed Chats', 'My Tickets', 'My On Hold Tickets', 'My Open Tickets', 'My Overdue Tickets', 'My Response Overdue Tickets', 'My Teams Open Tickets', and 'On Hold Tickets'. Below these are sections for 'WORK MODES' containing 'Status Mode', 'Handshake Mode', 'Countdown Mode', and 'Priority Mode'. The top part of the interface remains consistent with the first screenshot, showing the ticket list and sidebar.

Demo Ticket



The screenshot shows the Abhyaz ticketing system interface. At the top, there is a navigation bar with links for Analytics, Knowledge Base, Customers, Tickets (which is the active tab), Social, Chat, Community, Activities, and a dropdown for Abhyaz Talent Solutions. To the right of the navigation bar are various icons for search, filters, and user management.

The main area is divided into two main sections. On the left, the "Ticket Properties" panel is open, showing the following details:

- Contact Info:** Kakarla Tirupathi Reddy, Abhyaz Internship Applicants 2023, kakarlatirupathireddy@gmail.com, www.abhyaz.com
- Key Information:** Ticket Owner: Saumya Tiwari, Status: Open, Due Date: No Due Date set.
- Ticket Information:** Layout: Abhyaz Talent.

On the right, the ticket details are displayed:

This is a test mail #48239 . Kakarla Tirupathi Reddy . 12:53 PM . 00 : 00 : 00

1 CONVERSATION RESOLUTION TIME ENTRY ATTACHMENT ACTIVITY APPROVAL HISTORY

Kakarla Tirupathi Reddy . 12:53 PM (2 minutes ago)
"What courses does Abhyaz provide?"

At the bottom of the screen, there are buttons for "Apply Macro", "Remote Assist", and "Close Ticket".

Setup Module

In this module it includes various features. They are:

- Channels
- General
- Customization
- Automation
- Users and Control
- Data Administration
- Marketplace
- Developer Space

Channels

Email

Help Center

Chat

Community

Social

Phone

Web Forms

ASAP

**Instant
Messaging**

General

Company

Rebranding

Business Hours

Products

Departments

Zia

**Zia Powered by
Chat**

**Guided
Conversations**

Gamescope

Customization

Ticket Status

Layouts and Fields

Time Tracking

Modules

Templates

General Settings

Languages

Personal Setting

Automation

Assignment Rules

Notify

Workflows

Skills

Blueprint

Macros

Escalate(SLA)

Supervise

Schedules

Users and Control

Agents

Teams

Permissions

Data Administration

Import / Export

**Bulk Actions
Log**

Recycle Bin

Zwitch

**Privacy
Settings**

Marketplace

Zoho

All

Microsoft

Others

Developer Space

API

Connections

Functions

Webhooks

Mobile SDK

**Build
Extensions**

Zoho Desk APIs and SDKs

APIs in Zoho Desk :

With Zoho Desk's APIs, your developers can programmatically integrate with other Zoho apps and third party apps. Our APIs adhere to REST principles so your integrations are simpler.

Here are some key points about Zoho Desk APIs :

- **API Root Endpoint :** desk.zoho.com/api/v1
- **Authorization :** All Zoho Desk APIs require two mandatory fields in the header
 - An authentication request token and
 - The ID of the organization to access.
- **HTTP Methods :** Zoho Desk APIs enable data manipulation and retrieval through different HTTP methods like GET, POST, PUT, PATCH, and DELETE.
- **Errors :** Zoho Desk uses HTTP status codes to indicate the success or failure of API calls.

Authentication(OAuth) :

Zoho Desk's APIs use the OAuth 2.0 protocol for authentication and authorization. This protocol delegates user authentication to the service that hosts the user account and authorizes third-party applications to access the user account.

Steps for Authentication process:

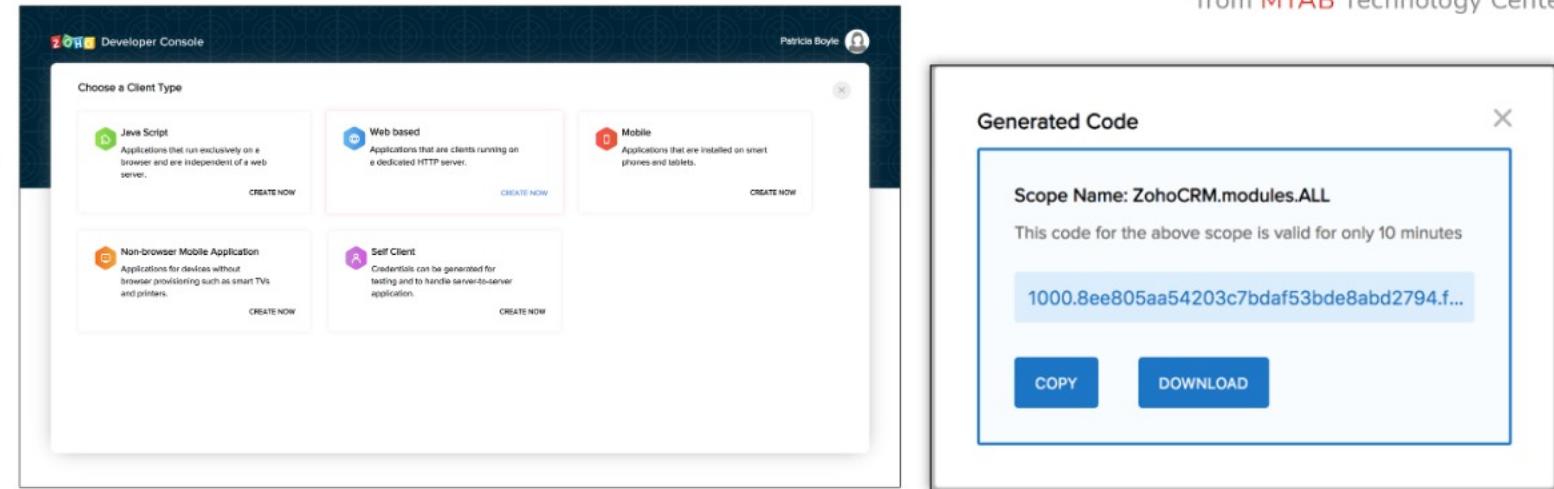
Step 1: Register your Application

Step 2: Making the Authorization Request

Step 3: Generating Tokens

Step 4: Refreshing your Access Tokens

Step 5: Revoking Tokens



SDK'S in Zoho Desk :

You can use Zoho Desk's powerful SDKs to build custom mobile apps, so you get access to all of Zoho Desk's modules and functionalities while having complete control over the app's UX.

Here are some of the SDKs available for Zoho Desk:

- Android SDK :** A toolkit for building custom Android apps with Zoho Desk features, allowing for module selection and custom UI design.
- iOS SDK :** The Zoho Desk Software Development Kit (SDK) for iOS is aimed at helping you build a custom iPhone/iPad app containing the features and functionalities of Zoho Desk.

Integration With Other Zoho Apps



CRM

Integrate your Zoho Desk and Zoho CRM accounts, for seamless coordination between sales and customer service teams.



Assist

Provide instant support by getting access to your customer's screen right from your ticket screen.



BugTracker

Add bugs for support tickets from within Zoho Desk, by integrating with Zoho BugTracker.



Analytics

Visually analyze customer support data and insightful reports by integrating with Zoho Analytics.



Books

Perform all payment related actions from within Zoho Desk.

[Read more](#)



SalesIQ

Instantly convert chat conversations with visitors from Zoho SalesIQ into tickets in Zoho Desk.

[Read more](#)



Projects

Include the voice of the customer in the development process.

[Read more](#)



Sprints

Bring your engineers closer to your customers needs, build a better product with valuable contextual information that your help desk receives.



Flow

Connect Zoho Desk with a diverse set of business apps and automate complex workflows with ease.



Cliq

Bring team collaboration, ticket assignment, and vital stats into a single chat window.



Invoice

Create and send estimates and invoices from within Zoho Desk.



Forms

Add form entries in Zoho Forms as tickets in Zoho Desk.

[Read more](#)



Inventory

Create sales orders and track shipments from tickets by keeping Zoho Desk in sync with Zoho Inventory.



Survey

Learn your customer support performance by sending out a survey to the customers.

Integration With Third Party Apps



G Suite

Collaborate, communicate and share information directly from Zoho Desk by integrating with GSuite.



Screen Magic

Zoho Desk enables you to notify your customers and support representatives using text messages (SMS).



Jira

Convert tickets raised in Zoho Desk to engineering issues in JIRA, easily.

[Read more](#)



Slack

Get real-time support updates, collaborate with your team and boost productivity from within Slack.



Salesforce

Pull in customer information and work in collaboration with your sales team.



Trello

Bring customer context into project management, and improve collaboration between teams.



Microsoft Teams

Collaborate, perform ticket actions, and get instant notifications from inside Microsoft Teams.



Zapier

With this integration, Zoho Desk can interact with other apps to share important data efficiently.



Asana

Quickly address customer issues by keeping your customer support and project management teams in sync.



Intercom

The right balance between having meaningful conversations with your customers and finding solutions.



Mailchimp

Support team members can easily get the full picture on which email campaigns are sent to customers.

pipedrive

Pipedrive

View existing customer details, manage contacts, deals and activities between Pipedrive and Zoho Desk.



HubSpot

With the HubSpot integration, understand customer information to prioritize and manage tickets in Zoho Desk.



Clearbit

With Clearbit integration, you can view your customer's information as soon as you open a ticket.



Customer Service Resources

It refers to the collection of resources within the platform that helps customers find answers to their questions and resolve issues without needing to contact support agents.

This documentation typically includes:

- Knowledge Base : It contains articles, FAQs, and other resources organized by topic, product, or other relevant categories.



For the knowledge base document, please refer to the link below :

<https://help.zoho.com/portal/en/kb/desk>



- eBooks : In Zoho Desk, eBooks are a collection of free digital books that provide insights and knowledge on various topics related to customer service and support.

For the eBooks, please refer to the link below :

<https://www.zoho.com/desk/resources/ebooks/>



- Release Notes: These documents outline changes and new features introduced in each Zoho Desk update.

For the Release Notes, please refer to the link below :

<https://www.zoho.com/desk/release-notes.html>



- **Videos :** These resources provide visual instructions and demonstrations on specific tasks and workflows within Zoho Desk

For additional videos, see the link below :

<https://www.zoho.com/desk/resources/videos/>



- **User Community :** This platform allows users to ask questions, share knowledge, and get help from the Zoho Desk users and experts. This can be a valuable resource for finding answers to specific questions or troubleshooting issues.

For the User Community, please refer to the link below :

<https://help.zoho.com/portal/en/community/zoho-desk>



Pricing & Editions

FREE PLAN :

Price: FREE up to 15 days only

Agents: Up to 3 agents

Features:

- Unlimited tickets and emails
- Multi-channel ticketing (email, phone, web)
- Self-service portal and knowledge base
- Basic reporting and analytics

STANDARD PLAN:

Price: ₹800/user/month (billed annually)

Agents: Unlimited agents

Additional features over Free:

- Self-service portal and knowledge base
- Basic reporting and analytics
- Automation rules and workflows
- Mobile app for agents

PROFESSIONAL PLAN :

Price: ₹1400/user/month (billed annually)

Agents: Unlimited agents

Additional features over Standard :

- Team collaboration tools
- Advanced reporting and analytics
- Custom branding and white-labeling
- Multi-language support

ENTERPRISE PLAN:

Price: ₹2400/user/month (billed annually)

Agents: Unlimited agents

Additional features over Professional :

- Advanced ticket routing and escalation
- SLA management and reporting
- Predictive analytics and insights
- Custom dashboards and reports

Best Practices

- **Customize Ticket Layouts and Fields:** Tailor ticket layouts and fields to capture specific information relevant to your support processes, ensuring that agents have the necessary details to address customer inquiries efficiently.
- **Automation Rules for Routine Tasks:** Implement automation rules to handle routine and repetitive tasks, saving time and allowing support agents to focus on more complex issues.
- **Prioritize and Categorize Tickets:** Establish clear prioritization and categorization for tickets to ensure that high-priority issues are addressed promptly, enhancing overall customer satisfaction.

- **Knowledge Base Maintenance :** Regularly update and maintain the knowledge base with relevant articles to empower customers to find solutions independently and reduce ticket volume.
- **Use Macros for Quick Responses :** Create macros for common responses, allowing support agents to respond quickly to repetitive inquiries while maintaining consistency in communication.

Real Time - Case Studies

Here are some real-world case studies of Zoho Desk implementation:



[With] our previous system when we received a user request, our answer 7 out of 10 times was, 'No', unfortunately, this is a limitation and cannot be achieved. With Zoho Desk, we have the capability of saying 'Yes', 9 out of 10 times... Zoho has offered more features and automations than what we experienced in the demo session.

[Detailed case study →](#)

Kunal Rijhsinghani
IT system administrator



The average response time for agents before Zoho Desk was seven hours, but with the process in place, the agents are now responding to each ticket within three hours.

[Detailed case study →](#)

Jim Francis
Systems Manager



Mercedes-Benz

We analysed other products in the market but Zoho Desk blended into our organization structure better than anything else.

[Detailed case study →](#)

Swaroop Naik
Senior Manager, Software Development



Zoho Desk is an awesome experience because we can gather all those complaints, along with addresses and other details, and communicate with the public, at large, in an efficient manner.

[Detailed case study →](#)

Wajahat Dewani
Founder/CEO of Clearwire

For additional case studies, see the link below: <https://www.zoho.com/desk/customers/>

	Zoho Desk	zendesk	Freshdesk
PRICING	AFFORTABLE	MODERATE	EXPENSIVE
EASE OF USE	HIGH	MODERATE	LOW
INTEGRATION	HIGH	HIGH	MODERATE
CUSTOMER SUPPORT	HIGH	HIGH	MODERATE
FEATURES	HIGH	HIGH	MODERATE
DEPLOYMENT SPEED	FAST	MODERATE	SLOW
ONBOARDING	SIMPLIFIED	MODERATE	COMPLEX
RESPONSE TIME	FAST	MODERATE	SLOW
CAST SCORE	HIGH	MODERATE	MODERATE
CUSTOMER CHURN RATE	LOW	MODERATE	HIGH

Comparison With Other Zoho Apps

Conclusion

Zoho Desk is designed to make life easier for both customers and customer service agents. It's a tool that helps businesses respond to customer queries quickly and efficiently. With its ability to integrate with other apps, it can fit seamlessly into your existing workflow. Plus, Zoho Desk is always getting better, with new features and improvements being added regularly. It's a smart investment for any business that values good customer service.

References



- 1) **Knowledge Base Document :**
 - <https://help.zoho.com/portal/en/kb/desk>
- 2) **Zoho Desk Document :**
 - <https://www.zoho.com/desk/>
- 3) **Google Bard :**
 - <https://bard.google.com/chat>
- 4) **Microsoft Bing :**
 - <https://www.bing.com/chat>

THANK YOU

