# PROCESS DOCUMENT : SETTING UP ZOHO DESK

## **OBJECTIVE**

This document outlines the step-by-step process for Setting up Zoho Desk. The objective of setting up Zoho Desk is to streamline customer service operations and improve agent productivity, ultimately leading to enhanced customer experiences.

## Overview of the Use Case

### Use Case Description:

Zoho Desk is a powerful cloud-based help desk software that empowers businesses to deliver exceptional customer service. Setting it up correctly is crucial for optimizing your workflow and providing a smooth experience for your team and customers.

### Input:

* It requires business information like company name, contact information and number of users.
* Agent details: This includes each agent's name, email address, and role (e.g., administrator, agent, supervisor).
* Permissions and access levels: This defines what actions each agent can perform within Zoho Desk.
* Availability and working hours: This ensures your customers can receive timely support.
* Email address: This will be used to convert emails into tickets.
* Social media channels: Connect your social media accounts to Zoho Desk to manage customer interactions directly.
* Knowledge base: Upload helpful articles and resources to empower customers to self-service and find answers to their questions.
* Branding elements: Customize your Zoho Desk portal with your company logo, colors, and fonts for a consistent brand experience.
* Workflows and automation rules: Define automated actions based on specific conditions to streamline your support processes.
* SLAs: Set Service Level Agreements to define response and resolution time expectations for different ticket types.
* Custom fields: Create additional fields to capture specific information relevant to your business operations.

### Output (Outcome):

At the end of this process, the following outputs are obtained:

Setting up Zoho Desk doesn't directly produce an output in the usual sense. However, it enables you to start using a powerful help desk system that can provide various outputs depending on how you use it. Here are some key outputs you can expect:

Improved Customer Support:

Enhanced Team Productivity:

* Automated Workflows
* Performance Tracking
* Collaboration Tools

Data-driven Insights:

* Comprehensive Reports.
* Customizable Dashboards
* Improved Customer Segmentation

Additional Outputs:

* Knowledge Base
* Self-service Portal
* Improved Communication

## Use Case Implementation Stages

### Implementation Stage 1: Sign up for a trail account

**Description:** This stage involves creating an account and activating your free trial of Zoho Desk.

**Input:**

* Your email address, desired password, and any optional information required by the signup form.

**Output:**

* A Zoho Desk account with access to the platform for the duration of the free trial period.

### Implementation Stage 2: Choose Your Plan

**Description:** In this stage, select a Zoho Desk plan that best fits your needs and budget. Free and paid plans are available with varying features and limitations.

**Input:**

* Information about your business size, number of users, and desired features.

**Output:**

* A selected Zoho Desk plan with specific features and functionalities.

### Implementation Stage 3: Organize your help desk with departments

**Description:** Each department in your organization works towards a specific goal. Therefore, it's important that you manage these departments separately in your help desk. Creating departments in Zoho Desk is as simple as this.

**Input:**

* Department names, Description, logo, Agent names, Description, channels.

**Output:**

### A designated department structure created for managing support tickets efficiently.

# Implementation Stage 4: Onboard your agents

**Description:** Now that you've created departments and set up the email channel, the next step is to ensure your team is on Zoho Desk to respond to these customer tickets.

**Input:**

* First Name, Last Name, Email, Roles and Permissions, Select Departments.

**Output:**

* A list of authorized agents and their respective teams within Zoho Desk.

### Implementation Stage 5: Set Up the Email Channel

**Description:** In this stage, you need to set up a channel through which your help desk can receive tickets. Despite the adoption of many new conversational channels like social media and live chat, email continues to be the most popular way for customers to reach businesses.

**Input:**

* Department name, Support Email address, Friendly Name, From Address.

**Output:**

* Zoho Desk receiving and responding to email support inquiries automatically.

**Implementation Stage 6: Check out your first ticket**

**Description:** In this stage,To give you a better understanding of the process and features, Zoho Desk has already created a sample ticket for you. You can check it out in the Tickets Module of your portal  
The ticket interface has two panes, and it provides you with the context you need before responding to a ticket. You can also pin the Ticket View Modes to this screen and open any other ticket without having to switch between screens.

**Implementation Stage 7: Enable Customer Happiness Ratings**

**Description:** In the final stage, we Ask for feedback from your customers and analyse the performance of your support program. That’s the only way to understand if you're meeting your customers' expectations and strengthen your relationships with them.

**Input:**

* Enabling various questions, and ratings.

**Output:**

* Getting customer happiness report.

# **Implementation Stage 8:** Create and respond to a ticket

**Description:** In this stage, Tailor the platform to your specific needs by adjusting various settings, such as automation rules, ticket workflows, and branding elements.

**Input:**

* Send an email to your from address.

**Output:**

* Within seconds, your email server will forward that email to Zoho Desk, where it will appear as a new ticket.You can click on the ticket and get into the response editor.
* Responding to this ticket is as simple as responding to an email on your email tool.

## Additional Stages :

# Implementation Stage 9: Create Layouts and Fields

**Description:** In this stage, Zoho Desk’s Layouts feature allows you to customize fields for each department, streamlining the customer support process. It includes both standard and custom fields, capturing essential information about Tickets, Customers, Organizations, Products, etc

**Input:**

* Enter the layout's name, display name in the Help Center, and description.
* Under Ticket Information, add department name, contact name, account name, email, phone, subject, description, status, ticket owner, and skills.
* Under Product Information, add product category, product name, service type, technology/function, and solutions.
* Under Additional Information, add language, layout, due date, priority, channel, classifications, and resolution.

**Output:**

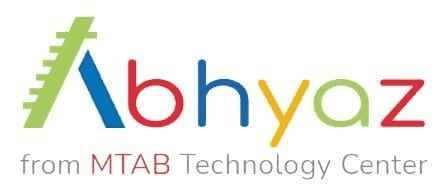
* Got the Customized ticket views.

# Implementation Stage 10: Create Assignment Rules

**Description:** In this stage, Assignment rules in Zoho Desk help automatically assign tickets based on specified conditions, routing them to the appropriate department and assigning ownership. These rules can be triggered for new tickets or when tickets are updated.

**Input:**

* Specify the rule name, description, and activation option. Then, define conditions such as ticket creation or update events.
* Define criteria based on ticket details and specify the department and agent to whom the ticket should be assigned.



**Output:**

* Automated assignment of tickets to the relevant department and agent based on the predefined conditions and criteria.

# Implementation Stage 11: Create Workflows

**Description:** In this stage, Workflows in Zoho Desk automate and streamline customer service processes by executing a set of rules when specified conditions are met. They can automate tasks like email notifications, ticket assignments, field updates, and more, improving efficiency and reducing manual work.

**Input:**

* You need to specify the module type for which the rule applies, rule name, description, and option to activate the rule.
* Choose the action to trigger this rule., such as when records are created, edited, specific fields are updated, receiving customer reply, responding to tickets, sending/receiving private email threads, receiving happiness ratings, or deleting tickets
* Specify the criteria to execute this rule
* Specify the actions to be performed when this rule is executed. Actions can be sending email alerts, assigning Tasks and updating field values

**Output:**

* The outputs of a Workflow in Zoho Desk are the actions that are executed when the specified conditions are met. These actions can include sending email alerts (Workflow Alerts), assigning tasks (Workflow Tasks), updating certain fields of a record (Workflow Field Updates), and executing custom functions.

# Implementation Stage 12 : Create the templates

**Description:** In this stage, Templates in Zoho Desk are preset layouts that help streamline communication and ticket creation. They include email templates for notifications1 and ticket templates for pre-filling values in support requests,

**Input:**

* Specify the module type to which the rule applies. Provide the name and select the folder. Include details such as from email, reply to, subject, and message.

**Output:**

* Template created

## Data Required

* Request for a customer data.
* Input from customers about the issues.
* Need Agent data to whom need to assign the tickets.
* Must have information about tickets.

## Tool Permissions Required

* Access to tickets and data.
* Need advance permissions for creating automations.

**FLOWCHART**

* **<https://www.canva.com/design/DAF3m5LC9aA/0k6gAVSK4wcogr6y-9WfOA/edit?utm_content=DAF3m5LC9aA&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton>**