

Zoho Desk Online Training for Administrator

OEM: Zoho Corporation • Code: ZOHO_DESK_ONLINE_TRAINING_FOR_ADMINISTRA

COURSE DESCRIPTION

This program will help you oversee all the important functions of an admin in Zoho Desk. This course offers fundamental and advanced configuration training for new Zoho Desk Admins. Learn how to set up processes, data security settings, and automation. Gain a deep understanding of the customization and integration options available to customize Zoho Desk to meet your requirements.

AUDIENCE PROFILE

- In Zoho Desk, Admin have all the permissions to set up the process flow, enable permission for the agents, and automate functionalities for your organization. Individuals or members who are responsible for the setup, configuration, and maintenance of their organization's Zoho Desk software should take this course.

PREREQUISITES

- This section doesn't contain any content.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- This section doesn't contain any content.

COURSE OUTLINE

Module 1: Day One - 4 Hours

Introduction

- Welcome to Zoho Desk
- Benefits of Zoho Desk
- Creating an account in Zoho Desk
- Overview of Departments
- Introduction to modules

Multi-Channel Support

- Importance of channels
- Channel limits based on edition

Emails

- What is a "Support Email Address" and how you can create one
- How email forwarding helps create tickets
- What is "From Address" and how you create one
- Need for SMTP
- DKIM
- Spam handling
- Other email configurations for your account

Help Center

- What is a Help Center?
- What is a contact?
- Invite your customers to access your Help Center
- Add your users to the self-service portal
- What is an Account?
- Impacts of duplicate Account and Contacts
- Provide solutions without an agent intervention
- Organize your Articles
- Customize your Portal
- Labels and groups
- Optimize your customer search using SEO
- Track users with Page Sense and Google Analytics

Knowledge Base

- Building thorough knowledge base articles
- Access settings of knowledge base module
- Organize and manage knowledge base
- Dashboard and gallery
- Multi-lingual

User Community

- What is a user community and can it help your organization?
- How to create and manage a post and a forum.
- Preferences for your posts
- How to moderate a post
- Convert topics and track as tickets
- How gamification can manage enthusiastic customers with badges and ranks

Social Brands

- Create social connections using your own brands
- Importing your brands from Zoho Social

- Managing Facebook posts
- Agent handling data from social
- Managing tweets
- Managing Facebook and Twitter direct messages

Voice Call Support

- Support your customers from anywhere via telephone service
- On-premise telephony support
- Use the phone bridge method to integrate with other providers
- Usage of calls in activity modules
- Agent call management

Web Forms

- Classification of web forms
- Allow customers to submit queries from your website via web forms
- Collect feedback on your content via feedback widgets

Instant Messaging for Your Business

- Integration of popular messaging apps
- Auto responses
- Monitoring metrics on the dashboard

Module 2: Day Two - 4 Hours

Advanced Channels

- ASAP
 - Importance of ASAP
 - Cast your help center in your website or blog
 - Zia bot with ASAP
 - ASAP customizations
 - User authentication in ASAP
 - Creating tool tips and Chrome extensions
 - Guided conversation bot with ASAP

Live Chat

- Configuration of instant chat support
- Embed live chat on your website
- Advanced chat settings

Guided Conversation - Self-Service Bot

- Blocks and variables
- Building your chat conversation flow
- Connecting with other services - webhooks

Tickets

- Overview of the tickets module
- How to help your agents handle your customer queries
- Using ticket work modes for effective customer support
- Help agents organize their tickets using views Pick on-demand tickets from the queue
- Managing comments and resolutions
- Approval process
- Difference between move, share, and split tickets
- Manage your team via feeds and notifications
- Follow your important customers
- Monitor your agents via headquarters

User Preferences and Accessibilities

- Selecting your preferred theme
- Switch to night mode
- Set your display layout
- Default editor font
- Accessibility controls

General Settings

- Significance of the primary contact in a company

Rebranding

- Significance of branding Zoho Desk
- Impacts or areas where your branding will appear
- Customize the company logo and fav icon
- Map your own domain
- Significance of multi branding and its functions
- Customize the portal name

Account Setup

- Setting up business hours and holiday list
- Configure customer happiness and the effects of it

Departments

- Significance of departments
- Structuring and configuration of departments
- Private vs. public departments

Products

- Need for products
- Create and manage products
- Association of products

Module 3: Day Three - 4 Hours

Customization

- Ticket status
 - What is a ticket status?
 - Types of statuses
 - Options for ticket status

Customize and Improve

- Need for customization
- Explanation of layouts
- Field customization
- Types of field and field counts
- Options of fields
- Managing field permissions
- Managing sections and rearranging fields
- Profile-based permissions
- Module layouts
- Multi-layouts
- Layout cloning

Automation via fields

- Layout rules
- Field dependencies
- Validation rules

Handling Modules

- Renaming modules
- Handling modules

Templates

- Importance of email and ticket templates
- How to build and restrict email templates
- Building ticket templates
- Use of ticket template

Time Tracking

- Using the time tracking feature
- Automating time tracking
- Manual vs automatic time tracking
- Billing for customer support

General and Personal Settings

- Associating multiple accounts to contact

- Agent idle time out settings
- Managing CCs on tickets
- Handling spam

Automation

- Assignment rules
- Understanding the round robin pattern
- Configure the round robin rule
- Tracking status from Headquarters
- Direct assignment vs round robin Email and SMS notifications
- Schedules and its uses Significance of SLA
- SLA and support contracts
- Time-based actions
- Skills and its usage in automation

Support Pillars

- Agents Agents and their permissions
- Significance of anonymizing agents
- Managing teams
- Managing roles and profiles
- Light agent
- Rewarding agents using game scope
- Handling spam

Module 4: Day 4 - 4 Hours

Advanced Automation

- Significance of workflows
- Configuration of workflows
- Custom action - quick automation through workflows
- Significance of custom functions
- Macros
- Difference between workflows and macros
- Phenomenon of blueprints
- Understanding transitions and the need for request cycles
- Configuration of blueprint

Managing Data

- Importing and exporting data
- Recycle data Data migration
- Zwitch
- Use of the bulk actions log
- Data backup
- Data subject requests (DSR)

Connect with Applications

- Integrations with in-house applications
- Integrations with Microsoft Extensions
- External applications

Developer Console

- Webhooks
- Mobile SDK
- API Connections
- Build your own extensions

Zia

- How Zia can help administrators
- Understanding the pulse of the customer
- Adding auto tags
- Reply assistant for agents
- Forecast your volume of data Zia translator
- Zia custom predictor
- Automation using Zia

Analytics

- Monitor the statistics using overview
- Default and static reports
- Cross module reports
- Cross departmental reports
- Creating custom reports
- Create charts for custom reports
- Helping agents track their performances using dashboards
- Use multiple dashboards for team statistics
- Customer happiness analytics dashboard
- Ticket status dashboard SLA dashboard
- Blueprint dashboard Telephony dashboard
- Zia dashboard
- Creating custom dashboards and adding components
- Schedule and send data to management
- Radar - real time analytics on the go