

Zoho Zia Agents Online Training for Administrators

OEM: Zoho Corporation • Code: ZOHO_ZIA_AGENTS_ONLINE_TRAINING_FOR_ADMIN

COURSE DESCRIPTION

This program prepares administrators to set up Zia Agents for their organization, build and govern agents in Agent Studio, and roll them out through the right deployment surface. It covers the full admin-relevant workflow: workspace and user setup, the four agent types, knowledge base, tools, connections, guardrails, testing, deployment, and observability — with hands-on labs throughout. Sessions are delivered in English with general examples from sales, support, and operations. Sessions provide a broad overview with industry examples — they are not tailored to specific business requirements. Trainers will not customize agents for individual business needs. 2 days | 7–8 hours per day (inclusive of breaks)

AUDIENCE PROFILE

- Open to Zoho customers adopting Zia Agents. Especially relevant for admins responsible for configuring agents, managing connections and credits, governing access, and overseeing rollout across teams. No coding experience required, but familiarity with Zoho CRM/Desk concepts helps.

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: Setup, Studio & Building Your First Agent

Introduction to Zia Agents

- What Zia Agents is and how it differs from bots and traditional automations
- How Zia Agents relates to Zia, Ask Zia, and Zia Skills
- Platform layout: Home, Agent Studio, Agents, Multi-Agents, Knowledge Base, Tools, Connections, Store, Settings

Workspace Setup (Settings)

- Profile and organization details
- Users, Roles, and Teams
- Vendor Configuration: Zoho Key System (ZKS) - Zoho hosted LLM and OpenAI
- Available models
- BYOK keys
- Credits and consumption tracking
- Instant Messaging setup (WhatsApp via Meta Business)

Choosing the Right Agent Type

- Agent without tools or knowledge base
- Agent with knowledge base only
- Agent with tools only
- Agent with tools and knowledge base
- When to use multi-agent workflows instead

Agent Studio

- Create From Scratch (four-step flow)
- Create with Zia AI (prompt-based)
- Role tags and prompt bar shortcuts on Home

Step 1 — Basic Information

- Name, description, icon
- Vendor and model selection
- Role and instructions

Step 2 — Knowledge Base

- Adding files (PDF, Word, etc.)
- URL and website sources
- WorkDrive sync
- Sync frequency for dynamic documents

Hands-on

- Setting up a workspace from Settings
- Building an FAQ agent end-to-end (Steps 1–2)

Module 2: Day Two: Tools, Guardrails, Deployment & Governance

Step 3 — Tools and Connections

- Pre-built tool catalog
- Tool groups and reusability across agents
- Connections: setup from Settings, from tool testing, or during agent configuration
- Scopes: using the Required Scopes guide in the Test APIs dialog

- Deluge authorization for connections

Step 4 — Configuring Guardrails

- Built-in fairness checks
- Built-in toxicity checks
- Custom do's and don'ts for your use case
- Permissions: who can create, edit, and deploy agents

Testing Agents

- Configuring test parameters
- Validating tool calls and connections
- Reviewing responses before deployment

Deploying Agents

- Standalone agents vs. Digital Employee Agents
- Deploy via Connection
- Deploy as Digital Employee (in supported Zoho services)
- Version management after going live

Integrating Deployed Agents

- ChatKit
- Cliq Chatbot (Create Bot)
- WhatsApp
- Agent API

Observability

- Session-level monitoring
- Execution metrics
- Step-by-step run breakdowns
- Consumption by agent

Agent Store for Admins

- Discovering pre-built agents
- Installing and configuring for your org
- Industry-specific pre-built agents

Hands-on

- Configuring a tool group with CRM data
- Setting guardrails for the FAQ agent
- Testing and deploying it via Cliq
- Reviewing observability data after a few test runs