Introduction to Zoho Desk

Help Desk is a department in an organization that is in charge of providing the support needed by customers while using the company's product or a service. Customers contact the help desk when they have a question or a problem and a product expert addresses the question and resolves the problem.

Help desk is managed by the product experts from the customer support department who address customers' queries or issues. Most companies give out an email address or a toll-free number to contact these experts. Nowadays, companies have opened various channels like chat, SMS, social media, webforms, and community forums to help customers reach the help desk anytime, anywhere.

Help desk software organizes customers' requests and helps to resolve them in the quickest way possible. It automates most of the steps in this process as possible. Help desk software consists of three parts: Ticket Management, Automation Suite, and Reporting and Optimization.

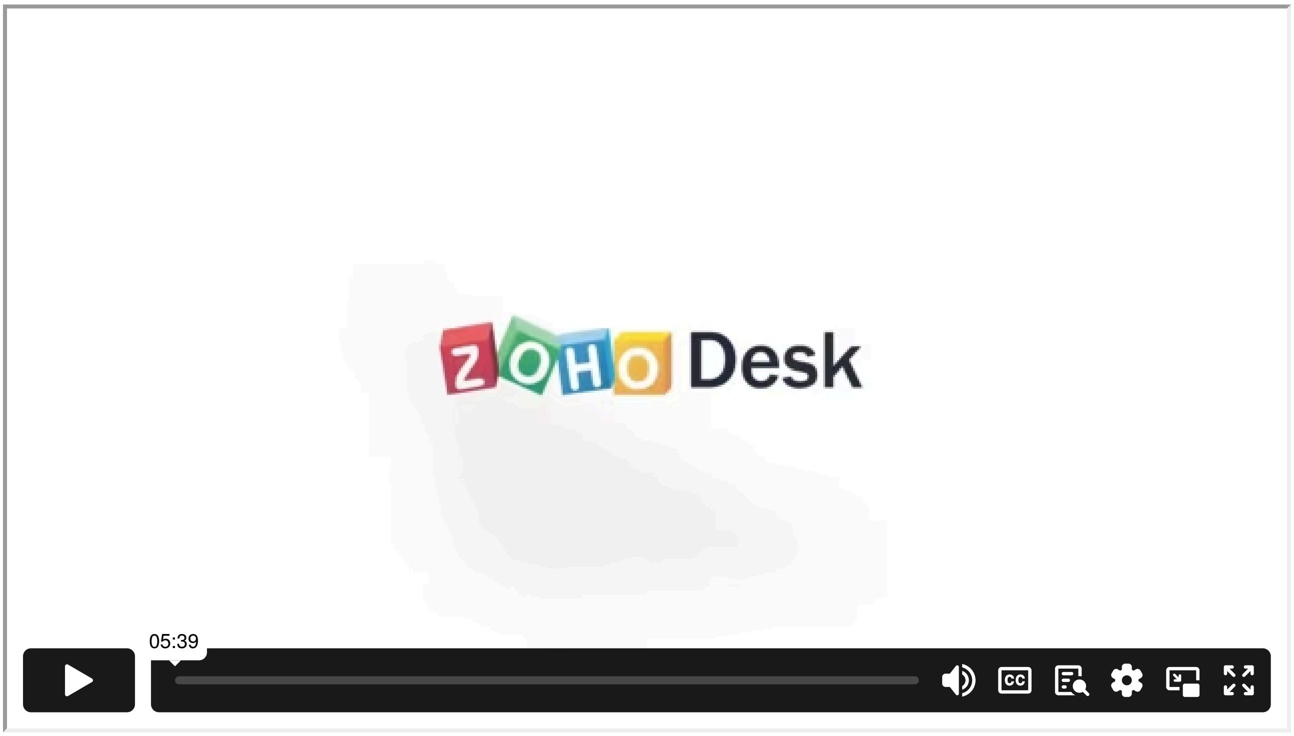
Ticket Management: The software pulls customer emails from an email address and lists them in a single place. It allows a help desk executive to easily answer and log calls from customers. It enables customer support executives to listen and respond to customer feedback on social media, such as Facebook and Twitter.

Automation Suite: The Automation Suite allows a help desk coordinator to ensure that questions from customers are redirected to employees who can answer them satisfactorily. It enables the coordinator to monitor when a support executive hasn't responded to a ticket, when a ticket is taking too long to get resolved, or one of the several other possible cases.

Reporting and Optimization: This is the most important function of customer service. It pulls pertinent information about the critical aspects of the help desk. Managers can understand parameters such as load on the help desk team, turnaround time, and resolution rate of each executive from these data. Metrics like these give managers a quick perspective on how things are faring and let them make amends for the better.

Why Zoho Desk?

A web-based help desk software like Zoho Desk can give you the ability to manage your customer support activities efficiently. In addition to the key functionalities to manage tickets, offer multiple channels for support and service, provide easy branding and customization and essential automations like SLA and workflows, there is quite a lot more in Zoho Desk. All these put together ensures that you give great customer support experience.



Essential Functionalities of Zoho Desk

Connecting with your customers via multiple touch points

Collect customer requests via phone, email, social channels or web form and set priority to the incoming tickets. Additionally, the community forums provide your customers a platform for discussion with the ability to convert a forum post into a ticket.

Making use of various tools for agent's productivity

Improve the resolution time and customer service by creating an internal repository of solutions and articles that agents can refer to. This Help Desk Solution for your support teams will allow your support staff to provide appropriate solutions for customer tickets effectively and save valuable time otherwise spent drafting the same solutions repeatedly.

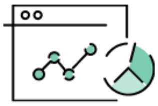
Providing a Help Center

Help your customers proactively before they contact your support team by building a self-service customer portal. This portal can be totally customized according to your brand's needs and includes the essential components with a comprehensive knowledge base, a community platform and a portal to submit, view, and track ones own tickets.

Automating essential and repeated tasks

Send acknowledgment emails on receiving tickets from your customers, assign tickets to agents based on various criteria and notify customers and agents sending notifications via email or SMS. Additionally, you can create SLAs to define ticket due dates and escalate them to multiple levels when they fall overdue.

Create Standard and Customized Reports



Take stock of your help desk activities and important facts about your support center's performance using in-built reports. Measure specific aspects of your ticketing process by generating custom reports effortlessly. You can determine the average resolution time, the number of tickets closed per agent per day, the number of tickets opened and more.

Maintaining a secure database

Do you receive sensitive information from your customers? Take charge by defining profiles, roles, and groups in Zoho Desk. Configure data-sharing rules and field-level security to ensure your proprietary information stays protected.

Accessing contextual information from Zoho CRM

Close your customer loop from sales to support by integrating with Zoho CRM, an industry-leading customer relationship management application. You can import your contacts and accounts information from Zoho CRM for contextual support service and view support tickets raised by your leads, contacts, and accounts from within Zoho CRM.

Another important point that you should be aware of before getting started with your Zoho Desk account is the browsers and the versions that support Zoho Desk.

Browsers Supporting Zoho Desk

Zoho Desk is a web-based help desk software that only requires an operating system that can run the latest compat
that you keep your computer up to date with the latest browser versions. By running an older browser you'll probat
Desk features that newer browsers support.

As of **June 2019**, we support the following versions of web browsers for the agent and administrator interface:

- **Google Chrome** | Version 60 and above
- **Mozilla Firefox** | Version 44 and above
- **Microsoft Edge** | Version 12 and above
- **Safari** | Version 9 and above
- **Opera** | Version 45 and above

Note

- Zoho Desk withdrew support and compatibility testing of all versions of Internet Explorer (including I
- Communication between Zoho Desk and the web browser must be secured by using the Transport Lay
browser doesn't support TLS 1.2 we will send across a warning banner requesting to update your brow
- Make sure you enable third-party cookies (especially on Safari) to have a trouble-free experience on y

First 10 things to get started with Zoho Desk

As you begin using your Zoho Desk account and start getting familiar with its features, you can refer to the checklist below for help setting up and onboarding your team effortlessly.

#1 Rebrand the account to reflect your company's identity with logo, custom portal name, and domain mapping.

You can also enable multi-branding if you need to maintain separate Help Centers for different brands or products of your organization.
Your portal name is a unique identifier for each Zoho Desk account. It's usually the company name that was entered during the signup. However, you can customize it at this point. The default support email address will also use the portal name. For example, if the portal name is 'zylkerdesigns', then the support email address would be support@zylkerdesigns.zohodesk.com. Similarly, your default Help Center will also have the portal name: www.zylkerdesigns.zohodesk.com/portal. This URL can also be customized by mapping the organization's domain to it, such as www.support.zylkerdesigns.com.

- Logo
- Domain Mapping
- Portal Name
- Multi-branding

#2 Plan and create departments based on teams, products, or even geographical locations.

Every department can have its own identity with a separate set of automations, workflows, agent access, multiple channels to collect tickets, and much more.

- Departments

#3 Add the organization's work hours and mark the holidays so that the system knows when an agent is available to take up tickets and tasks.

It also helps to automatically assign tickets to the available agents, escalate tickets, or calculate the due time.

- Business Hours
- Holiday Lists

#4 Setting up the email channel is one of the first things you need to complete, as emails are the most widely used means of communication in business.

You can set up other channels later, including community, chat, web form, and social media.

- Email
- Community
- Chat
- Web Form

- Social

#5 Setting up the Help Center requires you to customize it according to your brand and organization's theme.

First, choose one from the list of available themes and start with some basic customizations. You can perform advanced customizations according to the brand's choice by using the HTML and CSS options. You can also add default and custom widgets to display more information to users who browse through your help center.

- Help Center
- Customizations for Help Center
- Widgets

#6 Customize the fields and modules as soon as possible.

Once you make a list of the data that you collect and store, you can add new fields, edit the existing fields, mark them mandatory where required, or place them under relevant sections. When you import your data, you will have the layout ready to which the data needs to be added.

- Fields
- Modules
- Layouts

#7 Defining roles and profiles is essential before onboarding your agents as users in your company's Desk account.

Roles define the data that one can access, while profiles define the feature access for individuals. Similarly, data-sharing rules add an extra layer of security if you set the org-wide default permissions for the various modules. Once this is set up, onboard your teams and agents. As you add individuals, assign them the relevant role and profile that you already created. Furthermore, the offline support teams can be replicated in your Desk account by grouping them into Teams, which are useful in ticket assignment automations, workflow configurations and more.

- Roles
- Profiles
- Data Sharing
- User Management
- Teams

#8 Enabling the notification rules that Desk provides can help you stay on top of all your tasks.

It can be quite handy to get notified of the new responses to a ticket, or be informed of any calls and tasks that are assigned via email or text message. Your contacts can also receive specific notifications if you enable them, such as when a comment is added to their ticket, when it is edited, or when a ticket is closed. Similarly, you also need to keep track of what your customers think of the support they receive. Enabling customer ratings in Desk is a great way to collect the feedback and take action accordingly to improve your service.

- Notification Rules
- Customer Happiness Ratings

#9 Configuring some basic and essential automations can make sure things are in place right from the beginning.

You can begin with the assignment rules, which are important to automate assignment of tickets to agents and teams. You can also set up the round robin model, if that works for your organization. Service Level Agreements, or SLAs, are also quite useful when set up in the beginning, as this will define the process that you follow for response time, resolution time, escalations, and ticket reassignment. Building customer support workflow could be your next step. From the many processes that your organization has, you can identify the important ones that can be best followed when implemented as an automated workflow rule. For example, when a customer responds to your email with feedback, or when you have certain steps to be followed for a high priority support service.

- Ticket Assignment Rules
- Round Robin Assignment
- Service Level Agreements
- Workflow Rules

#10 Importing your data is the final step when your Desk account is all set up.

Start supporting your customers right away by importing support tickets, contacts, customer accounts, knowledge base articles, products, calls, events, and tasks.

- Data Import

> There is much more for you to discover in your Desk account, as we have a whole array of features for customer service and support. Based on the edition that you have subscribed to, you can implement them as you go.

SEE ALSO
Setting up the Organization
Setting up Data Security and Compliance