Zoho Corporation

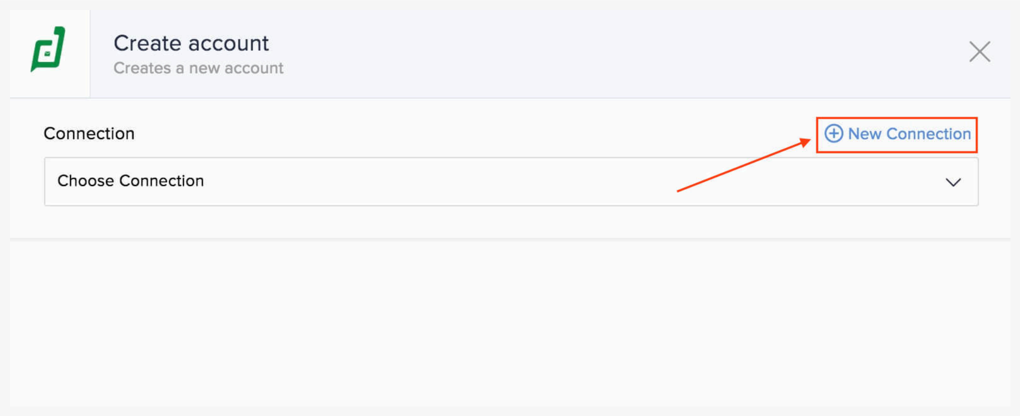
Zoho Desk

What is Zoho Desk?

Zoho Desk is context-aware help desk software for managing customer support activities. You can assign, track, and set up alerts on help desk tickets easily.

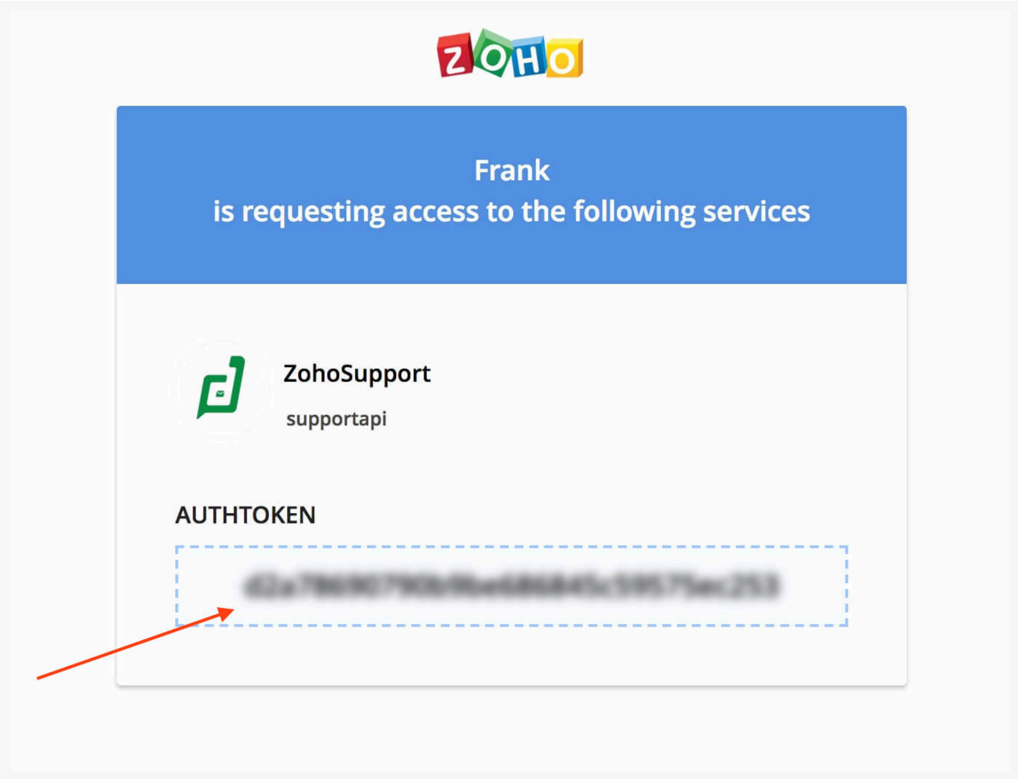
How to connect your Zoho Desk account to Zoho Flow

1. Select the trigger or action required. If you select a trigger, click **Next**.
2. If there are no existing Zoho Desk connections in your account, click **Connect**. Otherwise, click **New connection**.



3. Alternatively, you can create a new connection by navigating to **Settings**, then **Connections**. Click **Create connection** and choose **Zoho Desk**.
4. Enter a connection name and click **Generate authtoken**.

5. Copy and paste the authtoken from a new browser window.



6. Click **Authorize**.

API documentation

If you experience any Zoho Desk-related errors in your flows or if you wish to learn more about the Zoho Desk API, the API documentation can be found here.
Learn how to fix app-specific errors using API documentation

Triggers and actions available in Zoho Flow

Triggers

New account

Use this trigger to create new accounts based on accounts in your CRM, ecommerce, or subscription software.

New contact

Use this trigger to keep your Zoho Desk contacts in sync with your contact management tool.

New product

This trigger lets you add products in your inventory and notify your marketing team to announce on social media when a new product is added.

New task

Use this trigger when a new task is created to keep your team notified via email, add to your to-dos, or mark it in your calendar.

New ticket

Track tickets for the month in a spreadsheet, notify the assigned agent via chat, and remind your team via email if the ticket is still open 12 hours after it was created.

New ticket thread

This trigger keeps your team updated about ticket replies via chat or email.

New time entry in task

Use this trigger to calculate billing hours for each agent or task in your expense software.

Updated contact

Use this trigger to keep the contact details updated in your accounting and campaign management software.

Updated task

Use this trigger to update tasks in your project management software, send a chat message with the updated details, or record updates in notes.

Updated ticket

This trigger lets you keep both the customer and agent notified of any updates in the ticket.

Updated ticket status

Set up this trigger to record the details of tickets that are updated to a specific status, and email the team with ticket details.

Actions

Create account

Create accounts based on new accounts in your expense management or CRM tools.

Create contact

This action lets you create contacts when contact details come in from different sources such as emails, sign-up forms, or surveys.

Create product

Add products in your Desk when new products are added in your inventory, ecommerce, or accounting tools.

Create task

Use this action to create task when a lead is created in CRM, a quote is received, or when a task is created in your project.

Create ticket

Create tickets based on form entries, emails, or inventory orders.

Fetch account

Use this action to fetch all details about an account.

Fetch agent

This action lets you fetch the details of an agent to check if it exists.

Fetch contact

Fetch the details of a contact to send tailored emails when a ticket is closed.

Fetch product

Use this action to check if a product exists and notify your team.

Fetch ticket

This action lets you fetch all the details about a specific ticket.

Fetch ticket thread

When a ticket is escalated, this action can help you get all the details about the ticket thread.

Trash account

This action allows you to trash accounts based on emails or form submissions.

Trash contact

This action lets you trash contacts that have requested to unsubscribe from your campaigns.

Trash ticket

Use this action to trash tickets based on form entries.

Update account

Keep account details updated in Desk when the details are edited in your other business applications.

Update contact

Update the details of a contact when they are updated in your email campaign, ecommerce, or task-management applications.

Update product

When a product's price, name, or manufacturer is modified, this action can mirror those updates in your help desk.

Update ticket

This action allows you to modify the details of a ticket based on the task status in your project management tool, order status in your inventory application, or report status in your expense management software.

What is the difference between ticket number and ticket ID in Zoho Desk?

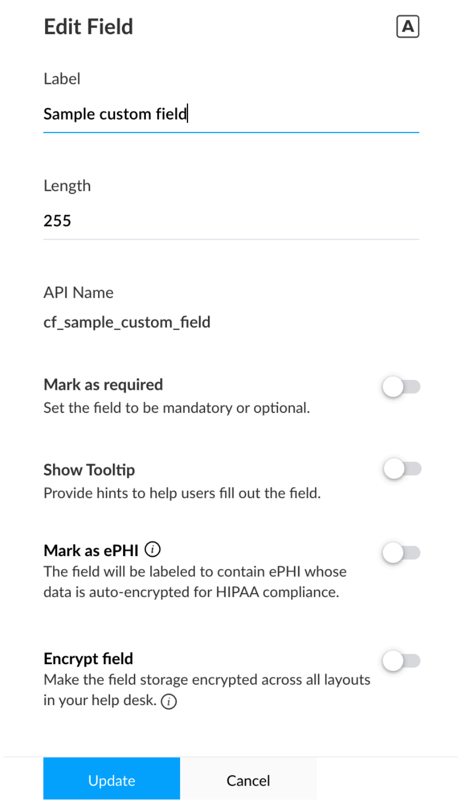
Ticket number is the index or serial number of a ticket. It is the number that is displayed with the ticket subject in your help desk.

Ticket ID is a unique identifier that is generated by Zoho Desk for each ticket.

Using custom values in Fetch actions

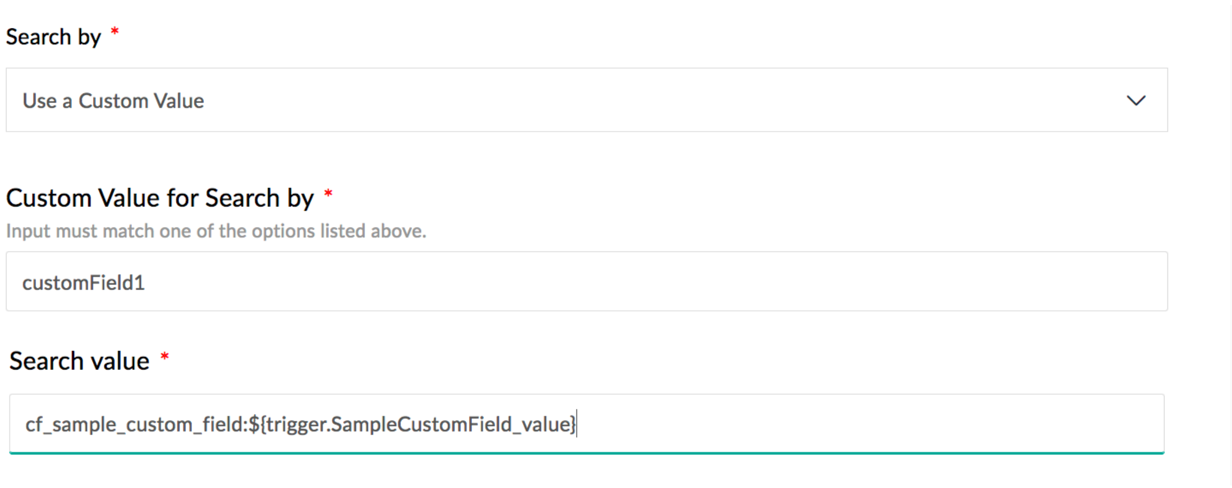
Some *Fetch* actions allow you to search for records using unique custom fields associated with records. To do so:

6. Navigate to **Edit properties** > **API name**. Copy the value.



7. Return to Zoho Flow and paste the copied value in the **Search value** field.

8. Use a colon (**:**) immediately after the value you pasted, then click on the variable from the trigger or an action with which you want to search for a record.
   The format will look like this:
   cf_sample_custom_field:${trigger.sampleCustomField_value}



Common problems

1. **When creating a ticket, how do I get the requested Contact ID?**
   Use the **Fetch contact** action before creating a ticket to fetch details of the contact. Map the contact ID from **Fetch contact** to the Contact ID field of the **Create ticket** action.

2. **I get the error message "Your Zoho Desk Edition does not support this feature/operation."**
   If you're seeing this message, verify that:

   - The connected account has permissions to create webhooks in Zoho Desk
   - Your webhook limit in Desk isn't exceeded

   You can check this link for more details.