



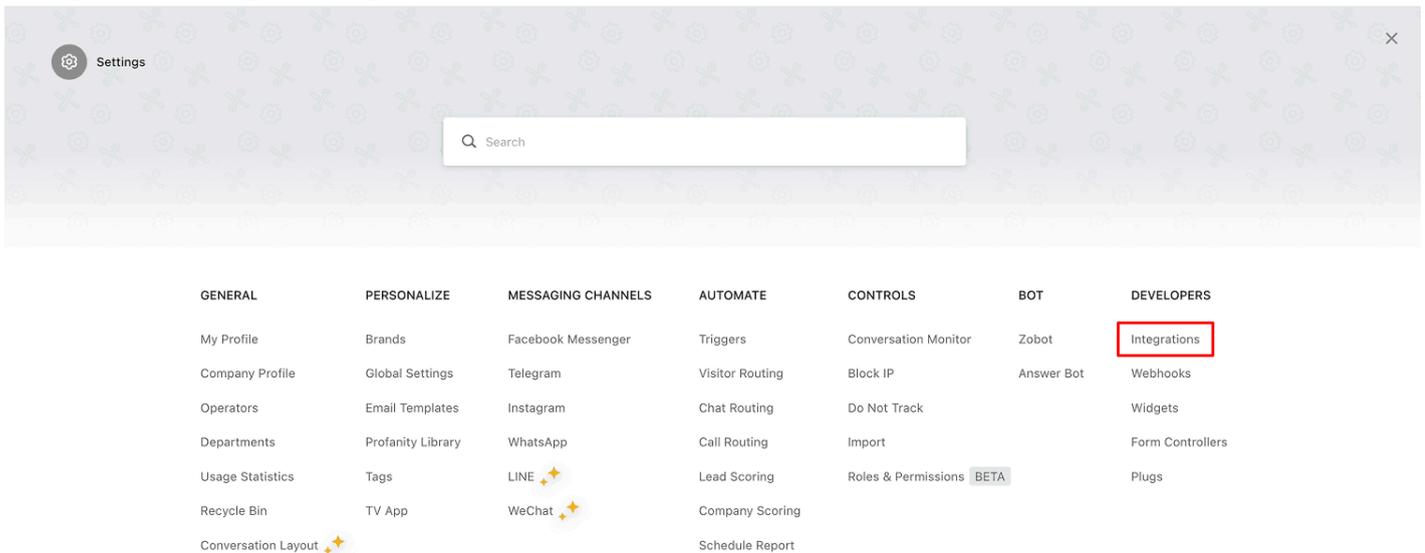
SalesIQ Integration

The integration with Zoho SalesIQ allows you to initiate an instant remote assistance session directly from your chat console. During a session, you can guide your customers by viewing their live camera feed and utilizing annotation tools for better assistance. This integration enables seamless customer support without the need for phone calls.

Enabling Zoho Lens for SalesIQ

Follow these steps to integrate Zoho Lens with Zoho SalesIQ:

1. Log in to your Zoho SalesIQ account.
2. Navigate to **Settings > Integration > Zoho Lens**.



← Integrations

My Apps

Marketplace

- Zoho Apps
- Telephony
- Analytics
- Appointment
- Data Provider
- CRM
- Data and Enrichment
- Email Marketing
- Help Desk
- Payments
- Translate
- Artificial Intelligence



Zoho Assist
Remote support software that helps you assist customers through web-based, on-demand remote support sessions.
Inactive



Zoho Desk
View all the tickets raised by your visitors and convert chats into help desk tickets right from the SalesIQ dashboard
Active



Zoho Lens
Offer real-time support to customers with the Zoho Lens remote assistance feature within the operator chat window. Troubleshoot customer problems by viewing the incoming camera stream from a smartphone or smart glass and providing quick resolutions.
Active

3. Click **Add** and connect with your Zoho Lens account.

← Settings > Integrations > Zoho Lens ×



Zoho Lens

Add

Integrate SalesIQ with Zoho Lens

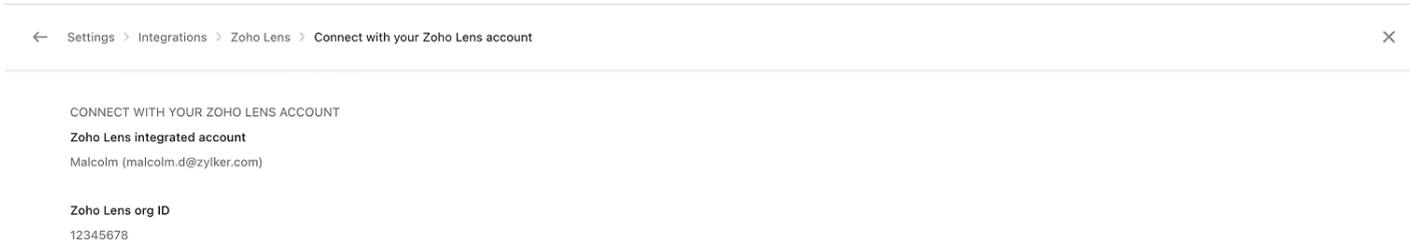
Key features

- Operators can view the incoming camera stream and provide instructions to resolve issues quickly.
- Lens offers various annotation tools to draw and highlight elements on the visitor's screen for clear instructions and guidance.
- Sessions can be recorded for internal audits, session analysis, and training purposes.

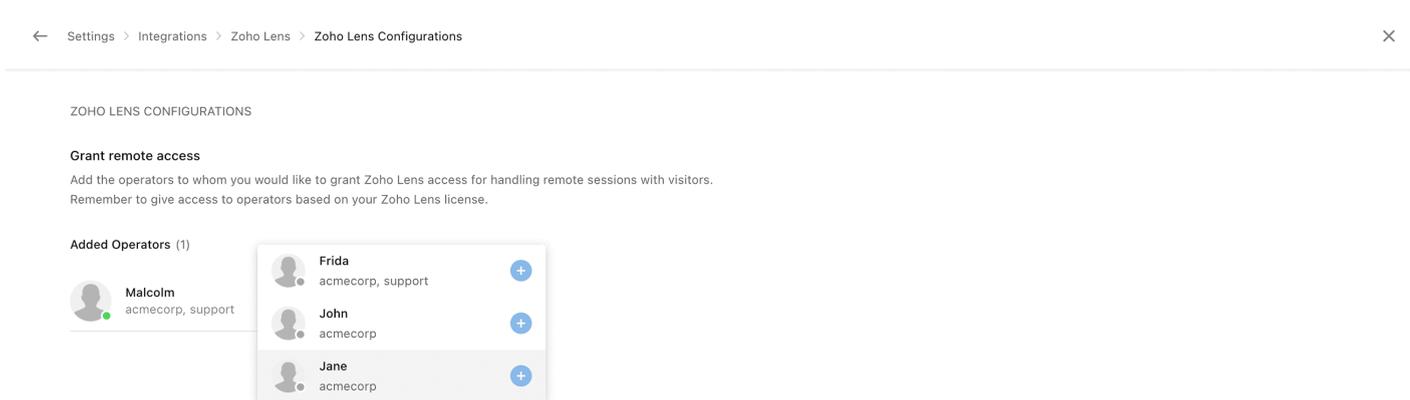
How it works

- Operators can initiate a remote session via Zoho Lens from the SalesIQ operator chat window.
- The visitor accepts the session request to grant mobile camera access.
- Operators can provide assistance by viewing the incoming camera stream and providing instructions to resolve issues.

4. You can view your organization details in the integration window.



5. You can also add technicians based on your Zoho Lens subscription.



6. Navigate to **Settings > Personalize > Global Settings > Operator Interface** and enable the **Remote Access** toggle to allow technicians to request remote access session.

Choose the chat channel for internal communication
 Pick your preferred chat platform to communicate with your team. Please reload the page after specifying an option for the changes to reflect.

Zoho Cliq
 SalesIQ - Internal Chat

Remote access powered by Zoho Lens
 After integrating with Zoho Lens, enable this option to allow operators to send remote session requests to visitors for swift support. 🔴

Preview visitor message
 Enabling this feature lets you view visitor messages as they're being typed in real-time, allowing you to stay ahead of the query and have more time to answer. 🟢

Profile enrichment powered by Zia
 Add more information about the visitor's company in the operator chat window, as well as in company and contact modules. 🟢

AI tools for operators
 Enhance your operators' productivity by incorporating artificial intelligence into your customer service and

Note:

Only super admins can integrate a Zoho Lens account with Zoho SalesIQ.
 Only technicians within the same organization can be granted access to handle remote assistance sessions in SalesIQ.
 Once configured, you can enable or disable the integration as needed.

Updating Zoho Lens Org Details

If a Zoho Lens account is linked to multiple organizations, users can update the linked organization in Zoho SalesIQ by navigating to **Integration Settings** and clicking **Change**.

CONNECT WITH YOUR ZOHO LENS ACCOUNT

Zoho Lens integrated account

Malcolm (malcolm.d@zylker.com)

[Change](#)

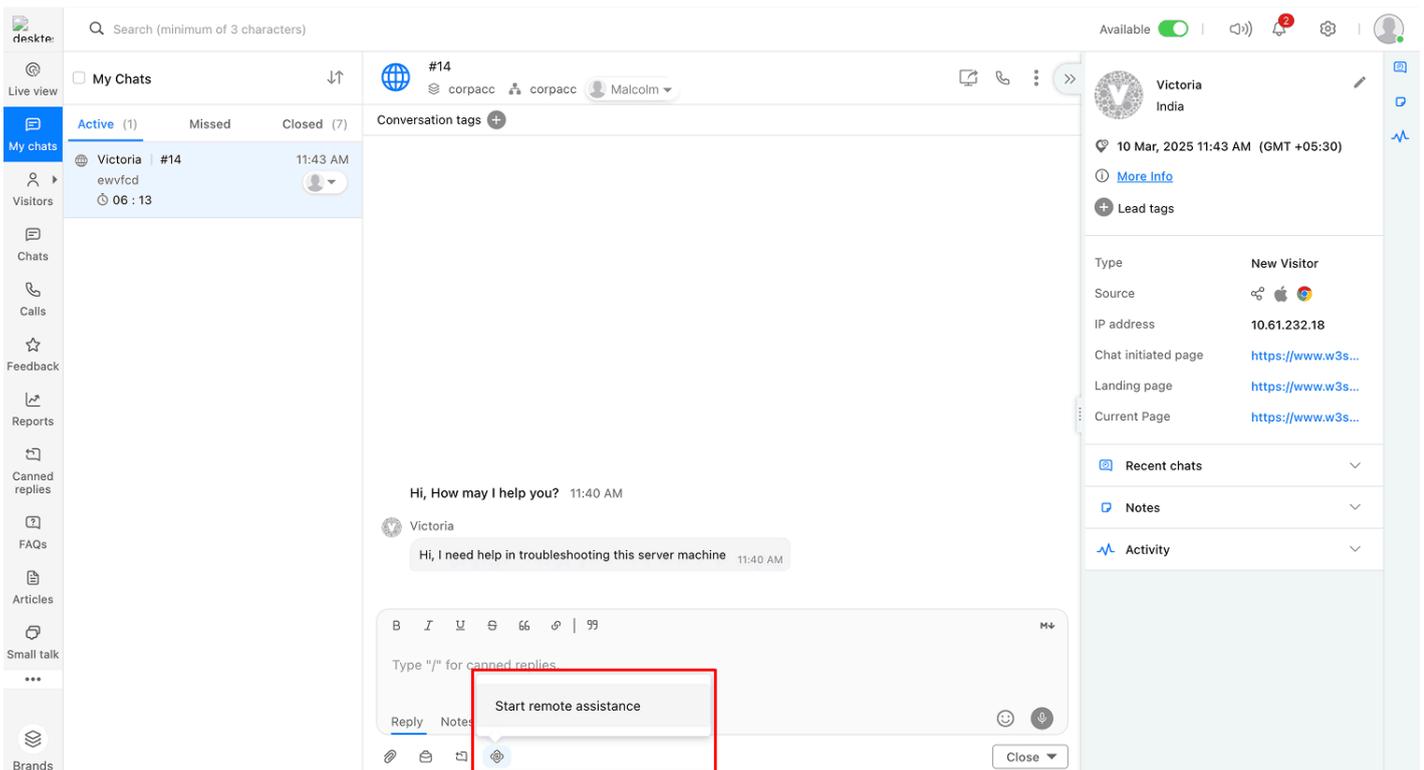
Zoho Lens org ID

12345678

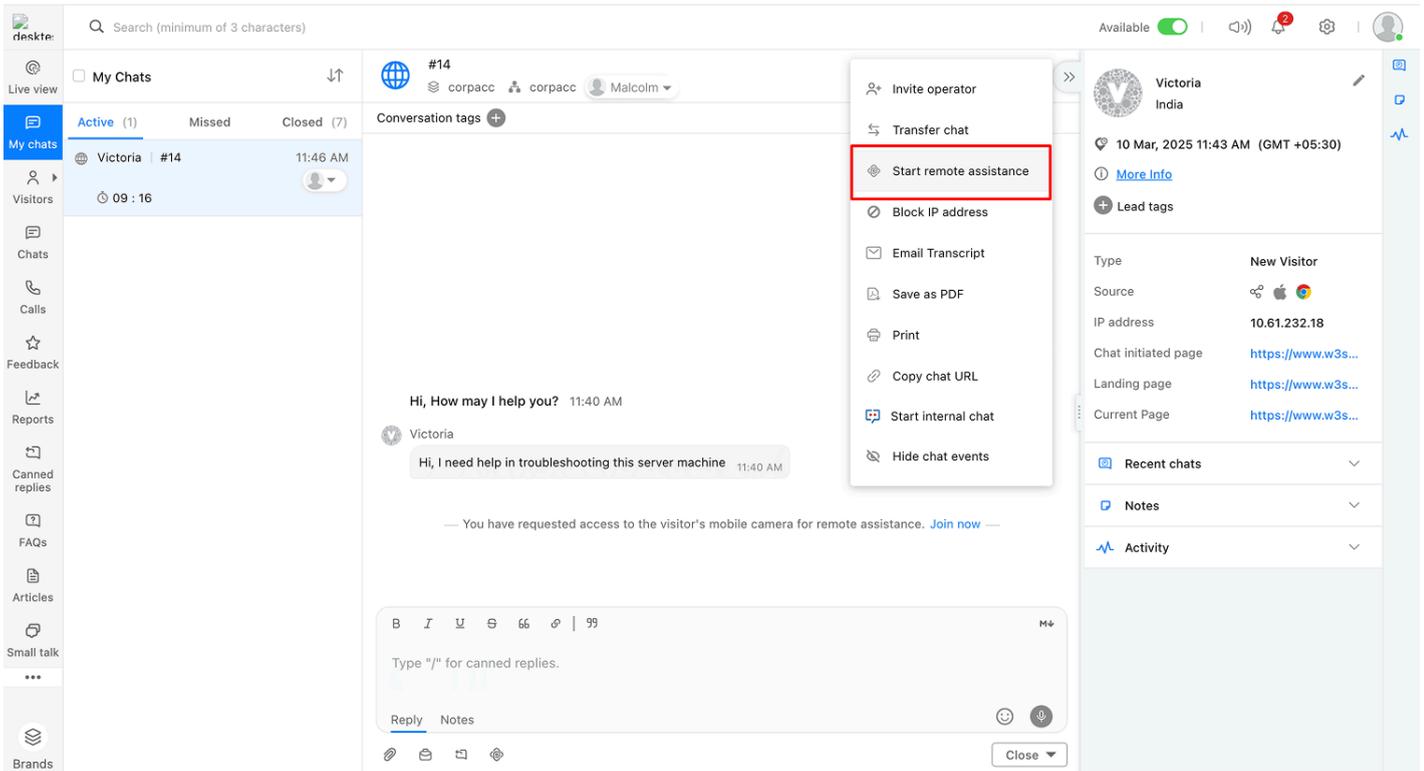
Initiating a Remote Assistance Session

To start a remote assistance session from Zoho SalesIQ:

1. Open **Zoho SalesIQ** and go to **My Chats**.
2. Select the visitor's chat for which you want to initiate remote assistance.
3. Click the **Remote Assistance** icon at the bottom of the chat window.



4. Alternatively, click the three-dot menu and select **Start Remote Assistance**.



5. The session invitation will appear in the conversation. Click **Join Now** to initiate the session.

6. A new tab will open for the session. Share the **Join ID** with the customer via email or SMS to allow them to join the session.

