Zoho Service Management by Zoho One

Presented by… AQUAORANGE SOFTWARE CO., LTD. (HEAD OFFICE)

Zoho Desk (Customer Service)

Great customer service can be your competitive advantage Zoho Desk helps you stay on top of every aspect of your customer service effort.

Happier customers

Deliver happiness to your customers and get them to adore you! Desk helps you be more accessible to your customers, provide them with quick resolutions, and make doing business with you convenient.
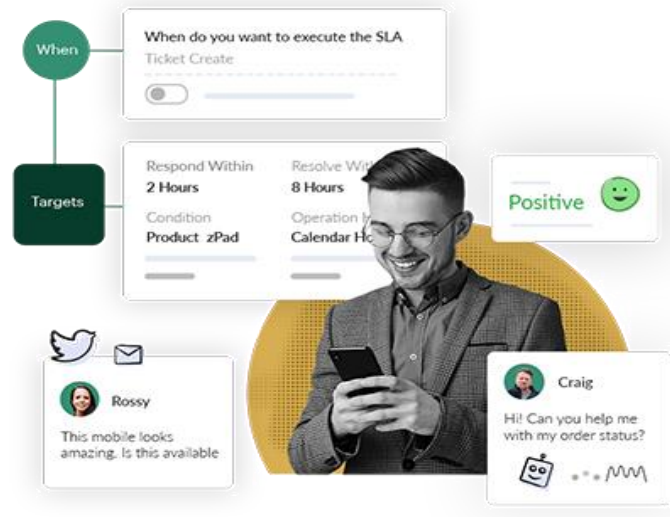
Omnichannel

TICKET MANAGEMENT

What is a ticketing system? A ticketing system is software that helps you streamline customer support tickets. Ticketing system software provides all the context you need to resolve issues and also allows you to prioritize, track, and automate routine support tasks.

**Why do you need a ticketing system?**

If your customer support team has the following troubles, it's probably time to implement a trouble ticketing system.

- ✓ Struggling to handle customer conversations across multiple platforms.
- ✓ Having trouble keeping up with everyday repetitive tasks.
- ✓ Frequently missing high priority issues and failing to meet deadlines.
- ✓ Struggling to organize all of the relevant data for a ticket.
- ✓ Disappointing customers because of slow response time.
- ✓ Receiving poor customer feedback about your customer service.

- **Manage tickets and everything else in one place** Track customer requests across channels, brands, products, departments, and more.

Omnichannel Support Ticketing System
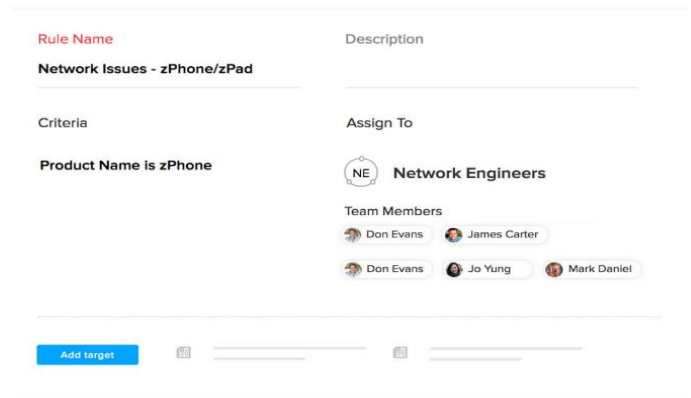Easy and user-friendly features set Zoho Desk apart as one of the best online ticketing systems available.

- ▪ **Omnichannel ticketing, done right** An omnichannel ticketing system collects support tickets from different channels and organizes them in a single interface, so agents can stay organized and reply faster. These channels include:
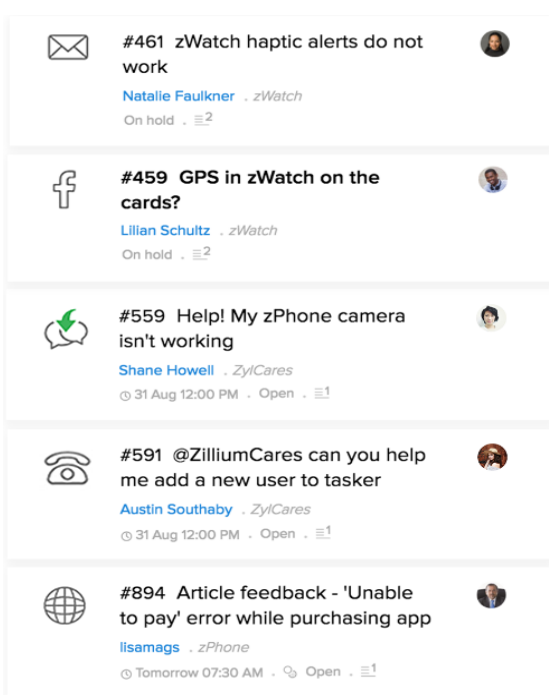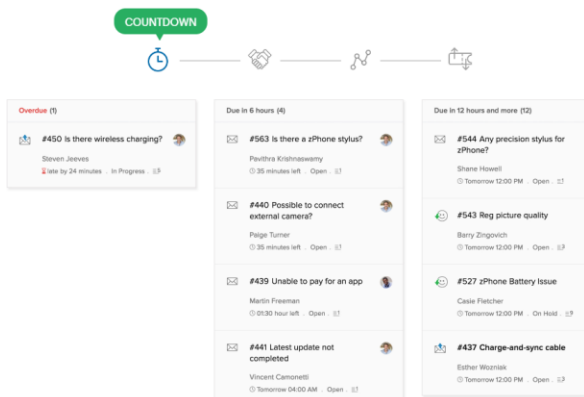
✉ **#461 zWatch haptic alerts do not work** Natalie Faulkner . zWatch On hold . ≡²	• **Email:** All of your customer emails are pulled into a convenient interface inside your ticketing tool, making it easier to respond. It makes a ticketing system instantly valuable to handle customer service emails across multiple email addresses.
f **#459 GPS in zWatch on the cards?** Lilian Schultz . zWatch On hold . ≡²	• **Social media:** You can view and manage customer communication via social media, like Facebook, Instagram, and Twitter. You can reply to tweets and posts from your ticketing system and even set keyword alerts, so you never miss a post.
💬 **#559 Help! My zPhone camera isn't working** Shane Howell . ZylCares 🕐 31 Aug 12:00 PM . Open . ≡¹	• **Live chat:** Chatting with customers can help you understand their concerns better, and provide more timely, personalized help. The support ticket system makes it easy to convert live chats into tickets if the issue needs more detailed attention.
☎ **#591 @ZilliumCares can you help me add a new user to tasker** Austin Southaby . ZylCares 🕐 31 Aug 12:00 PM . Open . ≡¹	• **Telephony:** Our omnichannel ticketing system allows you to use cloud telephony, which means you can receive and make phone calls from within the help desk. You can also log, record, and monitor these calls, then convert them into tickets or associate them with existing tickets.
🌐 **#894 Article feedback - 'Unable to pay' error while purchasing app** lisamags . zPhone 🕐 Tomorrow 07:30 AM . 🔗 Open . ≡¹	• **Webform:** You should make it as easy for customers to reach you as possible, which is why Zoho Desk lets you embed a customizable web form widget on your website. That way, your customers can fill out a form with the details you need and submit their questions, which will be automatically turned into support tickets inside your ticketing software.

Start problem-solving, right away Sorting, prioritizing, and searching for the right context can take up most of your support time before you step in to give actual answers. An efficient support ticket software does it all at the push of a button.
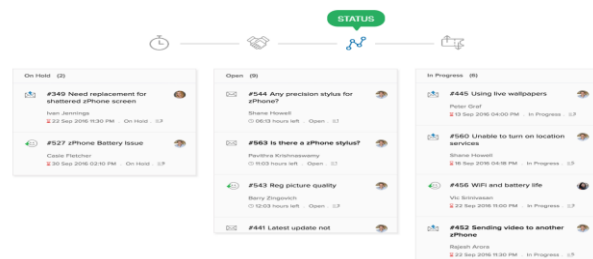
- • **Ticket assignment** With the right help desk software, you don't have to spend time on manual ticket assignments anymore. You can quickly set up Assignment rules to send the tickets to the right department and agent automatically. Direct assignment and round-robin automations in Zoho Desk save managers time and energy, so they can focus on critical tasks.

Rule Name — Network Issues - zPhone/zPad — Description

Criteria — Assign To

Product Name is zPhone — NE Network Engineers

Team Members: Don Evans, James Carter, Don Evans, Jo Yung, Mark Daniel

Add target

Pick your Work Mode

COUNTDOWN

Overdue (1) — #450 Is there wireless charging? Steven Jeeves — late by 24 minutes . In Progress

Due in 6 hours (4) — #563 Is there a zPhone stylus? Pavithra Krishnaswamy — 35 minutes left . In Progress; #440 Possible to connect external camera? Paige Turner — 35 minutes left . Open; #439 Unable to pay for an app Martin Freeman — 01:30 hour left . Open; #441 Latest update not completed Vincent Camonetti — Tomorrow 04:00 AM . Open

Due in 12 hours and more (12) — #544 Any precision stylus for zPhone? Shane Howell — Tomorrow 12:00 PM . Open; #543 Reg picture quality Barry Zingovich — Tomorrow 12:00 PM . Open; #527 zPhone Battery Issue Casle Fletcher — Tomorrow 12:00 PM . On Hold; #437 Charge-and-sync cable Esther Wozniak — Tomorrow 12:00 PM . Open

- • **Work Modes** You can sort tickets with a mouse click when you use ticketing software. Zoho Desk makes it easy to use filters like urgency, priority, type of customer, or ticket status. The tickets in Work Modes will automatically move to their appropriate column, so your team can prioritize what to work on.

STATUS

On Hold (2) — #349 Need replacement for shattered zPhone screen Ivan Jennings — 22 Sep 2016 11:30 PM . On Hold; #527 zPhone Battery Issue Casle Fletcher — 30 Sep 2016 02:10 PM . On Hold

Open (8) — #544 Any precision stylus for zPhone? Shane Howell — 11:03 hours left . Open; #563 Is there a zPhone stylus? Pavithra Krishnaswamy — 11:03 hours left . Open; #543 Reg picture quality Barry Zingovich — Tomorrow 12:00 PM . Open; #441 Latest update not

In Progress (6) — #445 Using live wallpapers Peter Graf — 12 Sep 2016 04:00 PM . In Progress; #560 Unable to turn on location services Shane Howell — 16 Sep 2016 04:18 PM . In Progress; #456 WiFi and battery life Vic Srinivasan — 22 Sep 2016 11:00 PM . In Progress; #452 Sending video to another zPhone Rajesh Arora — 22 Sep 2016 11:30 PM . In Progress

At the end of the day, an agent's goal is to get tickets from 'Open' to 'Closed', delivering great customer service in the process. For this, there's Status Mode, where tickets are ordered by status, for agents who like to focus on moving tickets to the next step.

- **Get to the specifics**. The all-new Work Modes give you what, when, where, who and how of every ticket.
- **Say "Hello" to context**. While working on a ticket, view detailed customer information, courtesy of Zoho CRM. This puts the conversation in context so you know exactly how to respond. For well-informed customer service, use Zoho Desk's advanced response editor.
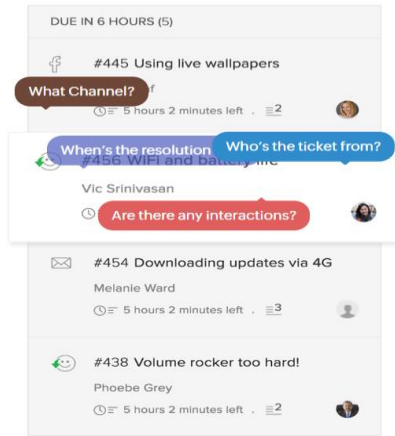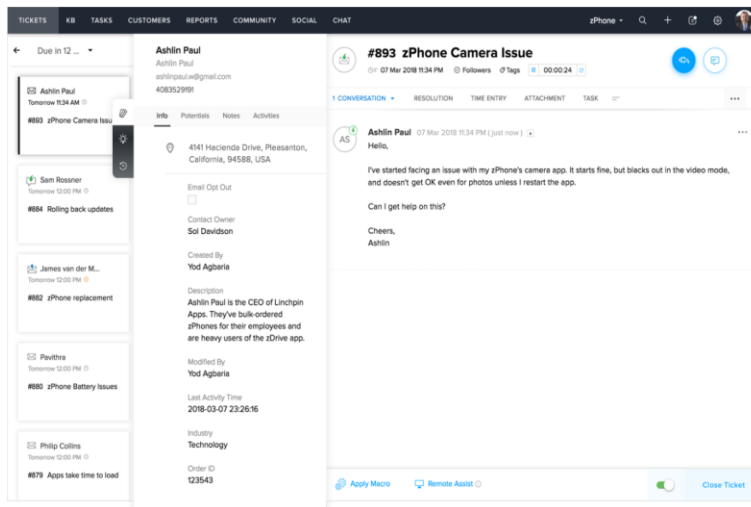

- **Completing Your Sentences** Tired of typing out the steps to reset a password? Or have you always wanted a quicker way to tell customers why their product isn't switching on? Zoho Desk automatically suggests solutions from your Help Center, letting you close straightforward tickets like these within seconds. Add them to your response in a single click.

Ex. Screenshot Call Center open ticket from Customer – Inbound Call
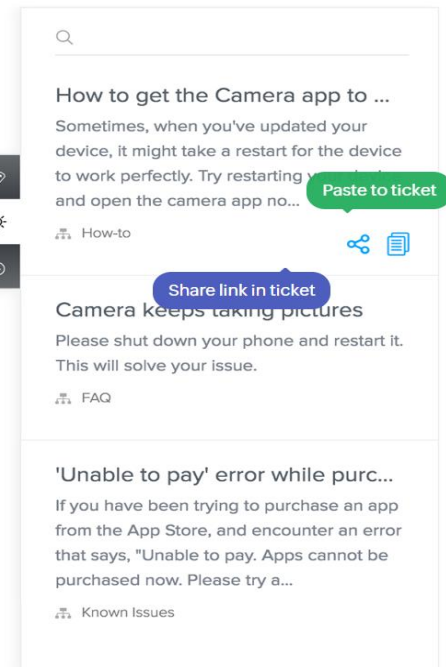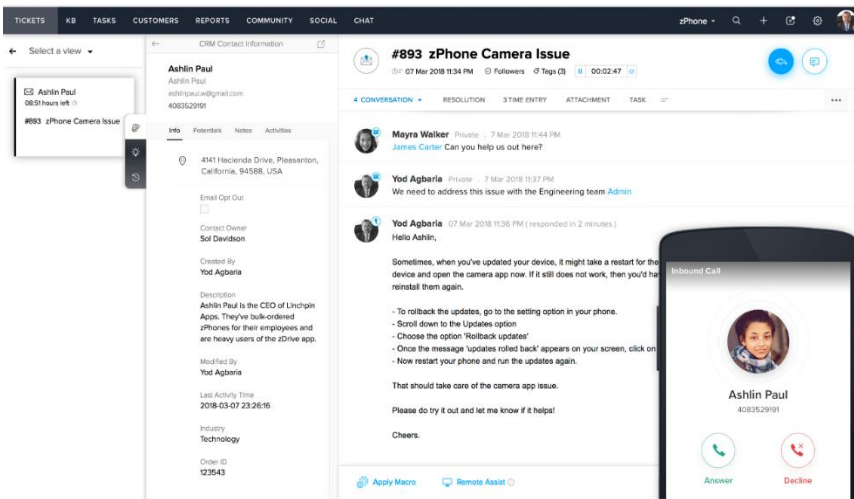
- **A Mobile App in the Hands of Agents**

The Zoho Desk mobile app allows you to get instant notifications about the tickets you follow, including accounts and contacts. The full details of responses and internal comments are available here, too. The app automatically organizes your tickets, prioritizing those that need your attention most. And you have CRM customer information available within, as well, so you can reference those contact details and past interaction details.
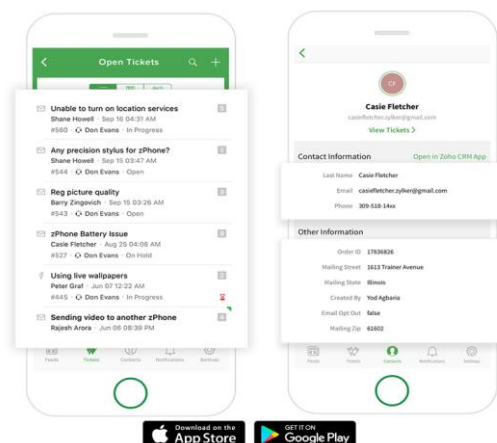
The latest overhauled Ticket Queue view
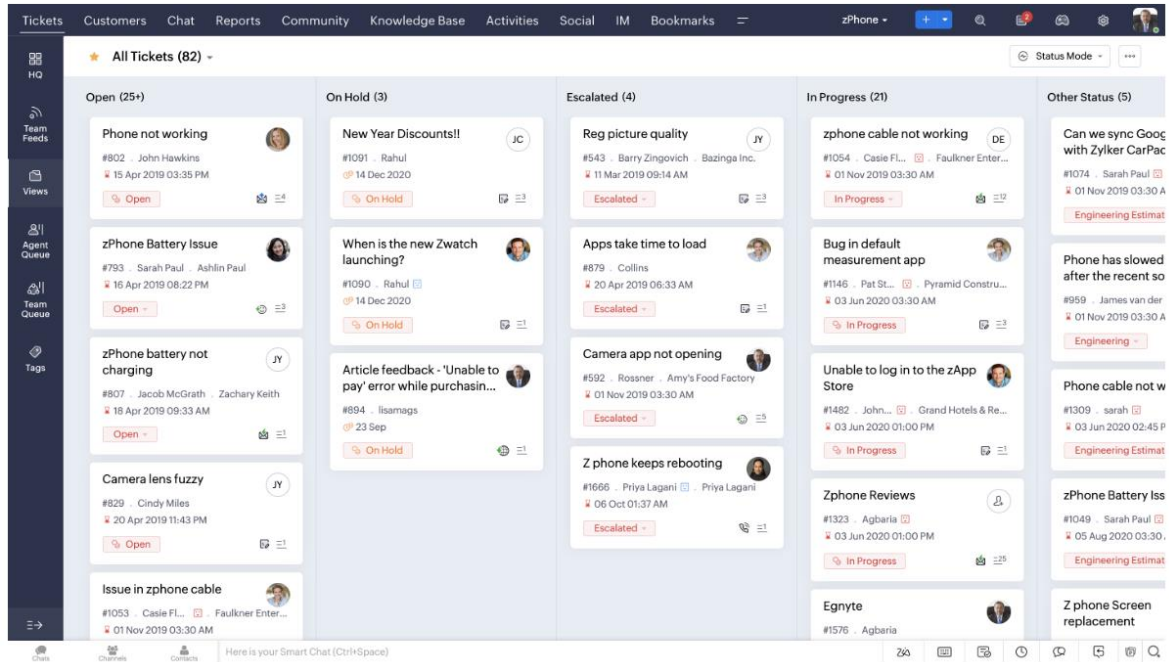
SLAs & ESCALATIONS

Keep your promises, automatically. Zoho Desk is armed with intelligent automations and SLA rules to help you run your help desk more efficiently.

- **Don't let tickets fall through the cracks.** Service Level Agreements help you automatically set a due time for tickets based on criteria like the channel the ticket came from, the customer who raised the ticket, and the status of the ticket. This helps your agents decide which tickets need their attention immediately and which tickets can be solved later.

- **Handle mistakes quickly.** When SLA violations arise, Zoho Desk automatically escalates the overdue tickets to the relevant manager or agent. You can customize a simple set of rules to govern these actions and manage tickets more efficiently.

- **Manage tickets proactively.** Managers and supervisors can create a custom view to see a list of all SLA-Violated tickets. They can then step in and manage these tickets either directly or by assigning them to another team member to ensure timely resolution.

- **Monitor progress.** Track the progress of the entire customer service effort, such as number of overdue tickets, SLA breaches, and average response times. These are important indicators of how well your team is functioning. Track them using custom reports, that can be easily generated and delivered to your inbox, automatically.

SELF-SERVICE

Offer quick help for the DIY customer Enable customers to find quick answers by themselves, wherever they are.

Knowledge Base
Browse your Knowledge Base for informative articles and FAQs.

Community
Post to and interact with your user community.

**Tickets**
Raise a support ticket right from within the app.

Ask Zia
Chat with Zia, an AI-powered conversation assistant.

- **Every brand gets its own space.** Distinguish the identity of your brands by providing each brand its own Help Center. Change how your Help Center looks, and give your customers different service channels, SLAs, notifications, and Knowledge Base articles for each brand you support.
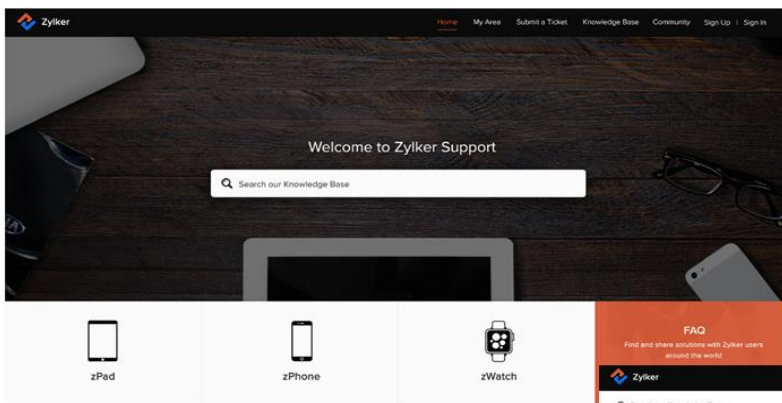

• **Portal Customization**
Customize your portal to mimic the look and feel of your website using HTML and CSS.

• **Domain Mapping**
Make your Help Center an extension of your brand by mapping it to your own domain.

• **Secure Access**
Decide who can access your Help Center by allowing public access or by requiring visitors to set up accounts.

• **Integration with Google Analytics**
Observe your customers' self-service behaviour and engagement levels.
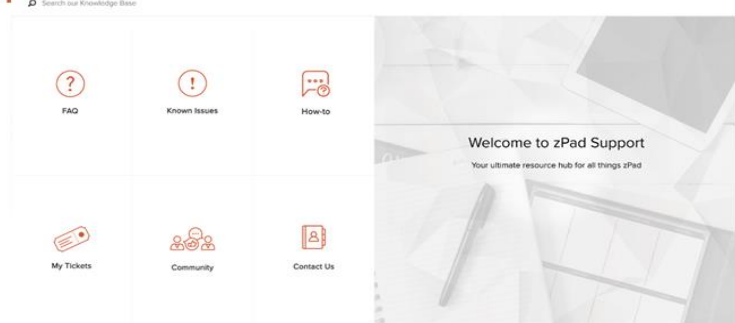
- **A Knowledge Base that's searchable**. Create Knowledge Base Articles to answer your customers' frequently asked questions. Use the Knowledge Base to save your team the work of responding to simple questions, so you'll have more time to help customers with tricky problems.
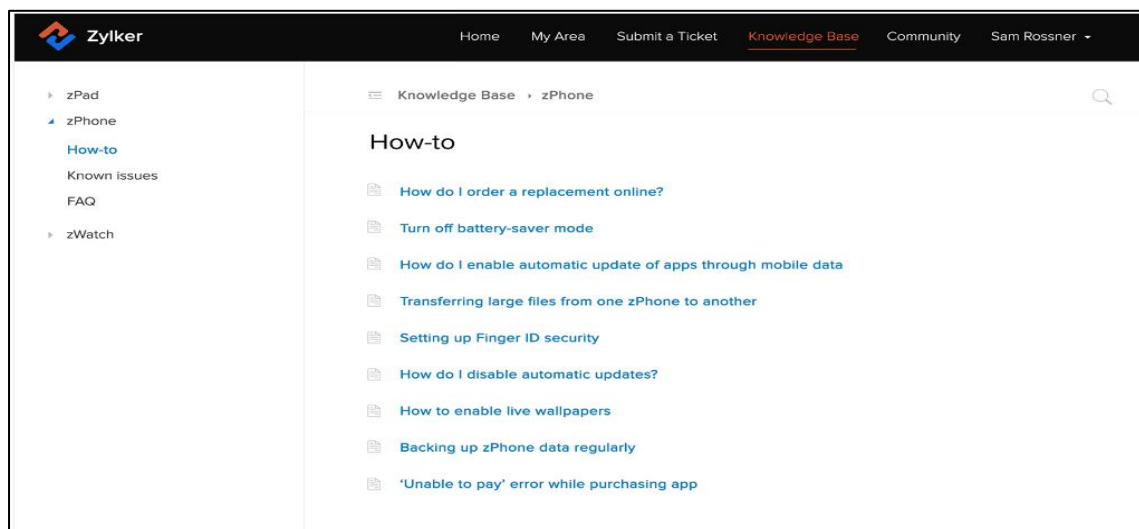
- **Build your own community**. Desk lets customers engage in discussions with your team and with each other. They can ask and answer questions, suggest and comment on ideas, file and solve problems, all on a common platform.
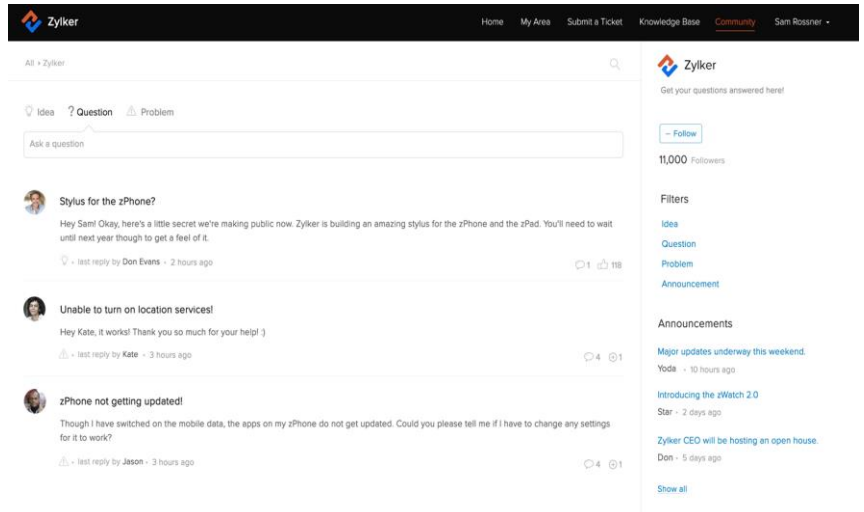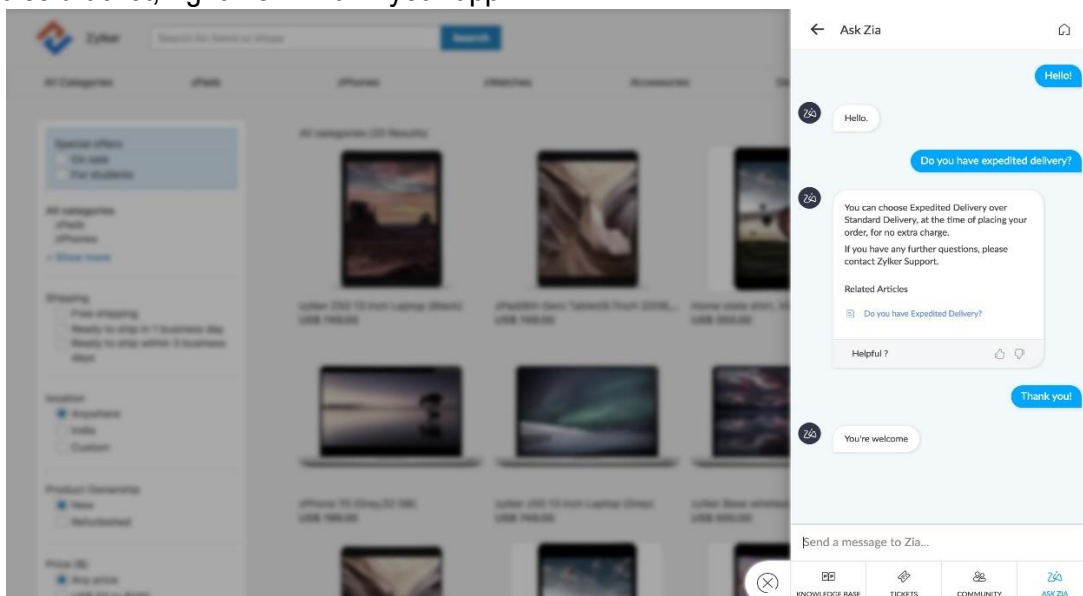

- **SEO Friendly** Make your support page easy for search engines to locate, with meta titles, key words and descriptions.

- **Article Rating** Desk lets customers rate your Knowledge Base articles so you can find where you need to improve.

- **Offer personalized interaction.** For questions that need personal attention, customers can submit tickets from the Help Center. They can also track their tickets' statuses or respond to your team's comments from the same interface.
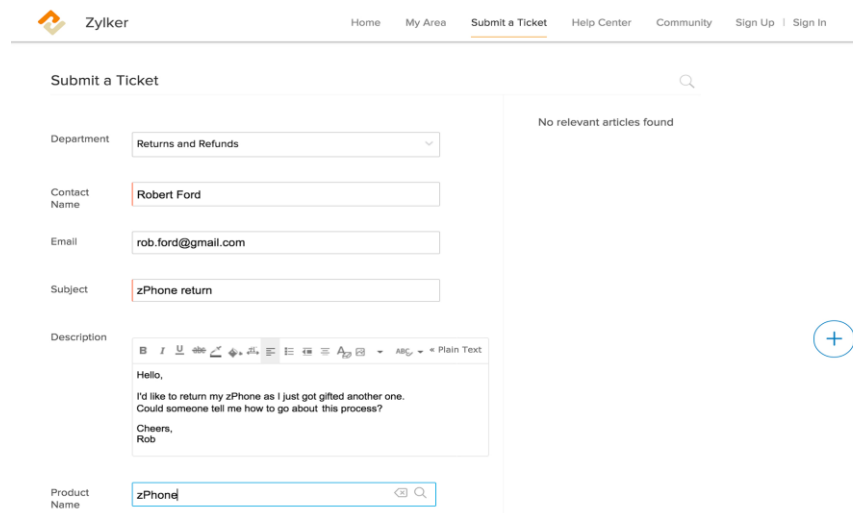
- **Take the solution to the problem.** Embed your entire help desk in your app, so your customers never have to run around looking for answers. They can browse your knowledge base, engage with your community, chat with your conversational assistant, or raise a ticket, right from within your app.

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Workflows

Zoho Desk provides intelligent workflow automations for your team to deploy so that they can respond faster and make every customer happier.

Respond to customers in the nick of time

In customer service, time is everything.

Quick response and resolution can set your customer service apart from the competition. That means you can't afford to lose track of pending tickets or responses. With time-based ticketing system workflows, you can configure the rules to be triggered when a timed event occurs.

For example, agents are notified when a ticket is pending for more than a specified number of hours, or when a response has been left unread for a certain amount of time. Similarly, an email can be sent to supervisors if a ticket remains unassigned for a set period, or when an agent spends more than a certain number of hours resolving it. You set this up as a single ticketing system process flow inside Zoho Desk to optimize your support efforts.

Ticketing system process flow improves first contact response time and customer happiness ratings.

- **Don't keep going around in circles**

Exemplary results come through innovation, not repetition.

When you're dealing with customer tickets every day, there are certain activities that you need to perform regularly and repetitively to keep things going. As your customer base expands, these day-to-day tasks become a routine and take up a major chunk of your support time. You run the risk of your agents prioritizing these routine tasks over responding to a customer's request on time.

With the ticketing system workflow automation from Zoho Desk, you can set up a set of rules that are executed when specified conditions are met. Using these help desk workflow rules, you can automate email notifications, assign tasks to different users, and automatically update the specified field values.

This improves agent productivity by taking care of routine manual activities.

- **Drop tickets where they belong**

Automation is nothing new but finding the right automation tool can be a game-changer.
By structuring a ticketing system process workflow, you can manage the tickets as they come in. Zoho Desk's help desk workflow is widely customizable. You can configure ticketing system workflow rules for assigning a ticket to a particular agent or department based on certain properties or keywords. When a ticket meets the set criteria, it triggers alerts to notify the stakeholders, and the specified tasks are carried out.
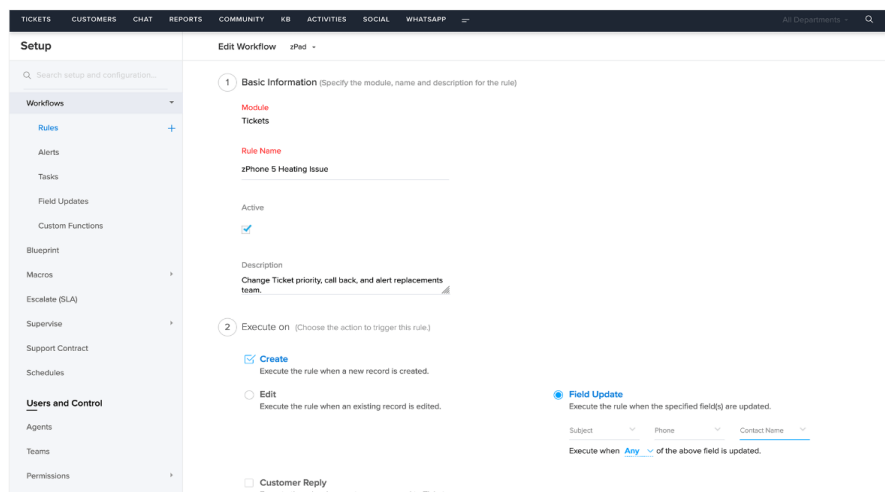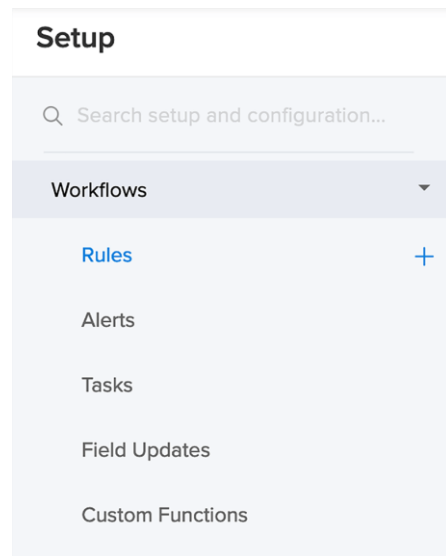
- You can set your help desk workflow to change the priority of the ticket or to escalate it to the decision-makers. All without any manual effort. Workflow automations in customer support help agents stay on track with SLAs and increase the transparency of the ticketing system process.
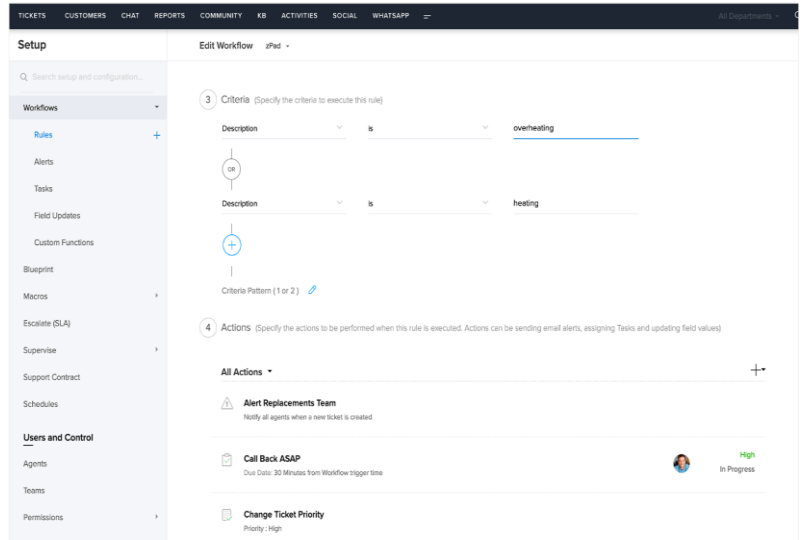
TIME TRACKING

Why watch the time?

Your team's customer service efforts require so many tasks, that it can get hard to keep track of where exactly time is spent. With Insights from Zoho Desk, you can measure how much time is spent on every ticket based on selected departments, agents, and modules. Calls and events are also supported for activity-enabled portals.
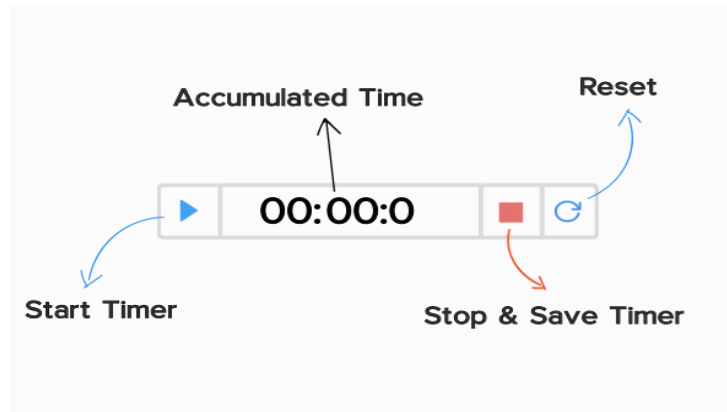
Time Tracking for Tickets and Activities
Configuring Time Tracking

Zoho lets you configure time tracking separately for each department. Your team can clock in working time manually for every ticket, or set it to automatically track the time they spend. You can even choose which actions to track, such as sending a reply, drafting a response, or leaving a comment.
Before you star, make sure you read the different tracking methods and associated settings listed below.

For Tickets
You can track the time spent on **tickets** in one of the following ways:
-Manual

-Auto

Actions to be timed
Zoho Desk gives you the ability to track the time spent on all or specific activities on tickets so that you can monitor just about anything your agents do. You can choose to track the following ticket actions:
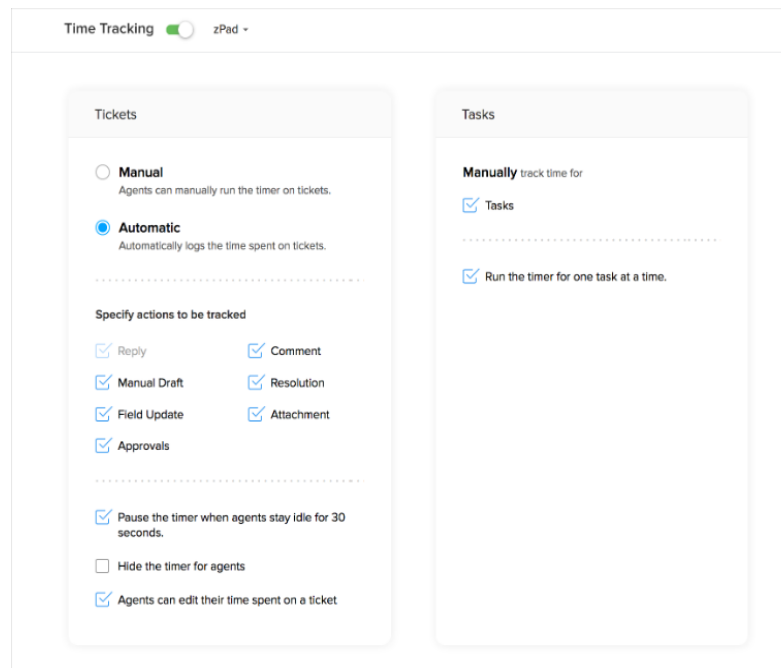
- **Reply** It tracks the time spent on performing a reply, reply all or forward action on a ticket. This option is selected by default, and you cannot deselect it.
- **Manual Draft** It tracks the time spent on drafting a response for a ticket. Agents must click "Save Draft" within the editor to submit their time.
- **Field Update** It tracks the time spent on updating a field without editing the ticket.
- **Approvals** It tracks the time spent on creating, editing and deleting an approval request.
- **Comment** It tracks the time spent on adding and editing a comment from the ticket's detail page.
- **Resolution** It tracks the time spent on adding, editing and deleting a resolution on the ticket's detail page.
- **Attachment** It tracks the time spent on adding and deleting files under the Attachment sub-tab on a ticket.
- **Remote Assist** It tracks the time spent on providing remote assistance to customers on their tickets. This feature is only available if you have enabled the Zoho Assist add-on.
- **Auto-pause timer** This option can be enabled to automatically pause the timer when the agent stays idle for 30 seconds. The timer resumes automatically when the agent navigates back to the ticket. It comes handy to avoid miscalculation of actual time spent on tickets.
- **Hiding timer from agents** When a ticket is opened, the timer is displayed at the top of the page allowing your agents to pause or reset it. You can choose to hide this timer from all agents, while Zoho Desk still tracks their time. Agents can, however, view a log of time spent on their tickets under the Time Entry tab.
- **Agents can edit their time spent** On completing a predefined ticket action, the timer saves and auto-submits the spent time. When you enable this setting, a pop-up window appears with the choice to submit or ignore the spent time. Agents will have 10 seconds to review their time before it gets auto submitted. This setting can be enabled only when you've displayed the timer for agents.

My Active Timers When you have a lot going on, paying attention to a timer is the last thing on your mind. That's why Zoho Desk has My Active Timers, a view that lists all of your active timers in the department. With this view, you can quickly plan what to finish and what to pause, among your current work items.
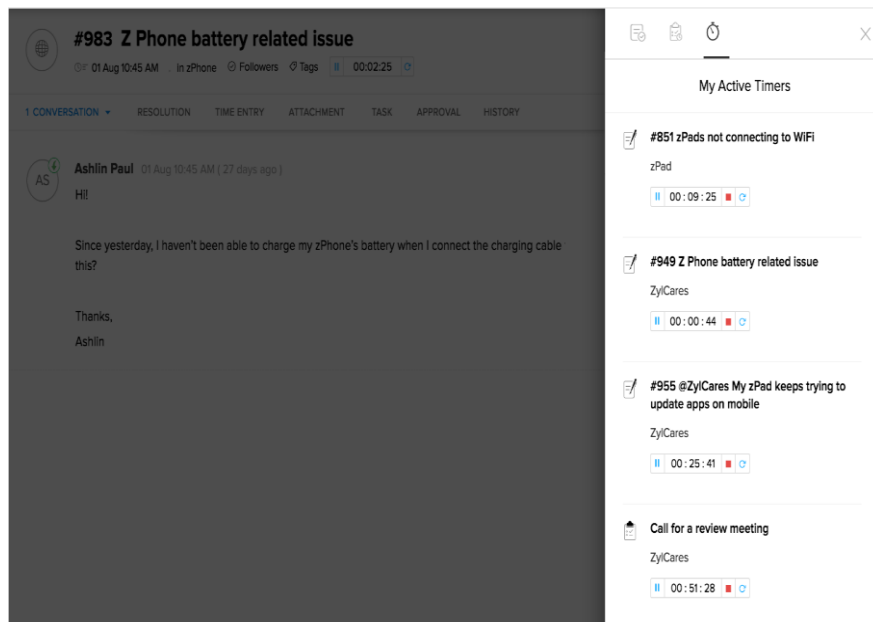

Setting up Billing Preferences

reating billable time entries is essential if you're going to charge your customers on the basis of time. Zoho Desk offers the ability to not only track time but also apply the correct billing rate in the time entries. All you need to do is set hourly billing rates by agent, by profile, or by ticket. The billable value for the time entries is then calculated based on the chosen hourly rates.

- **Billing for agents** Zoho Desk also lets you apply your billing rate to each time entry. All you need to do is set hourly billing rates by agent, profile, or ticket. All the math is automatic. With Zoho Desk's integration with Zoho Books add on and Zoho Invoice add on, time entries can also be added to estimates and agents can create invoices right from the ticket.
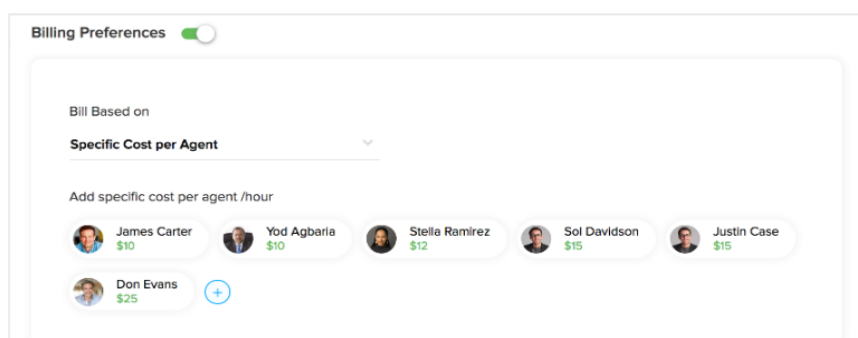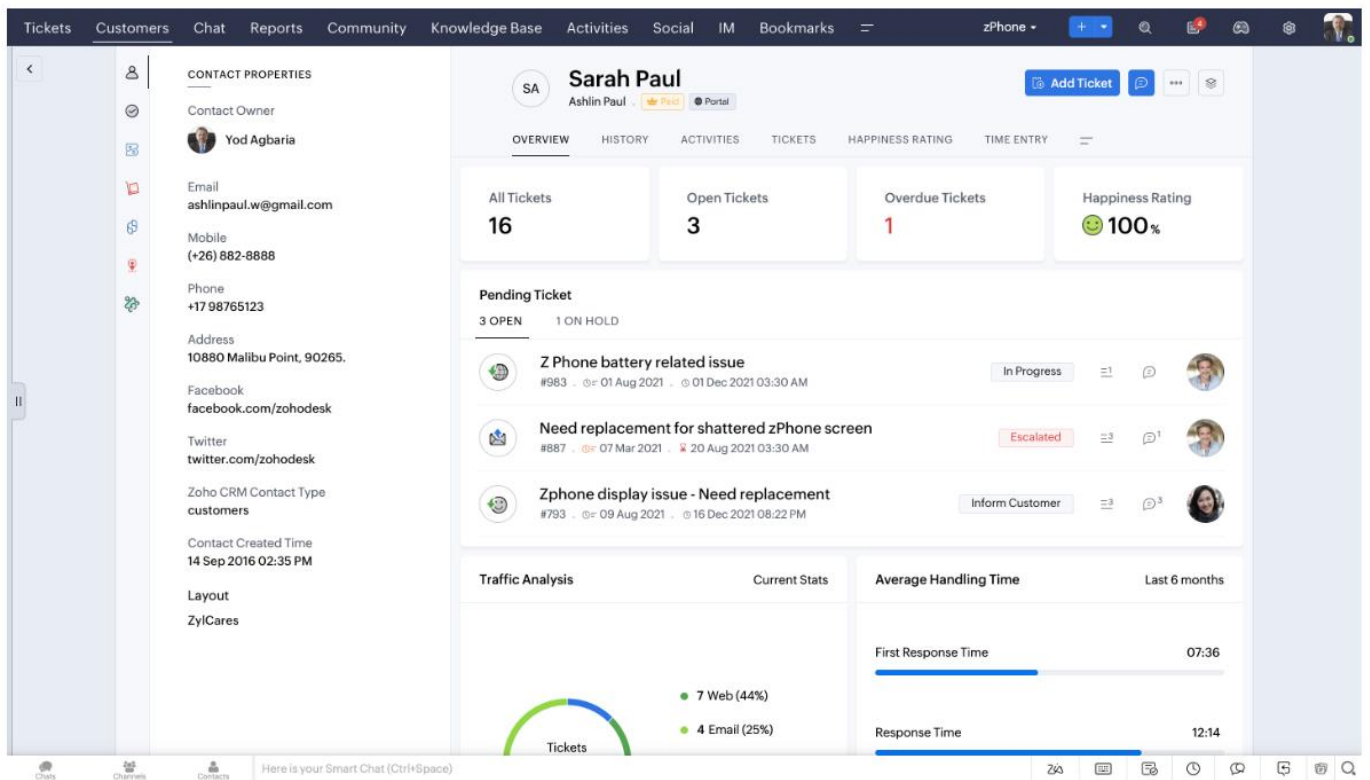
Billing History

Want to see when you added the cost for an agent? Need to know when and who last updated your billing preferences? Zoho Desk provides a complete history of all actions performed under billing preferences, from the time it was first enabled.
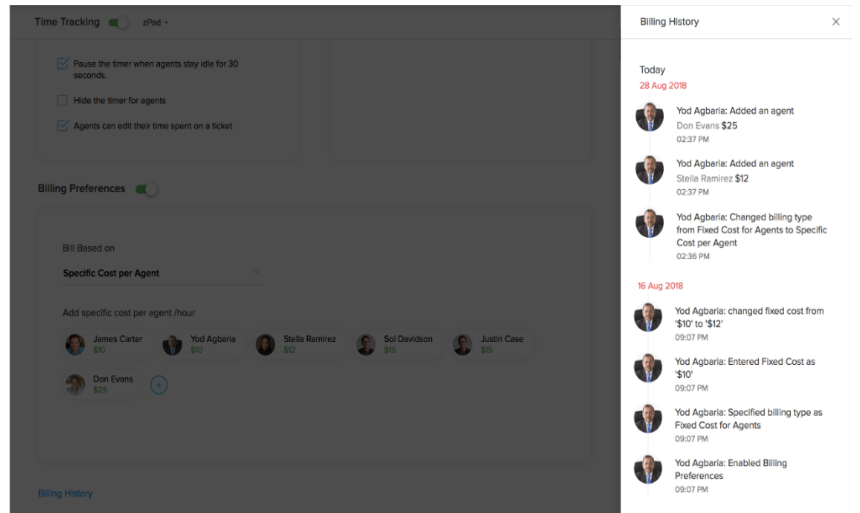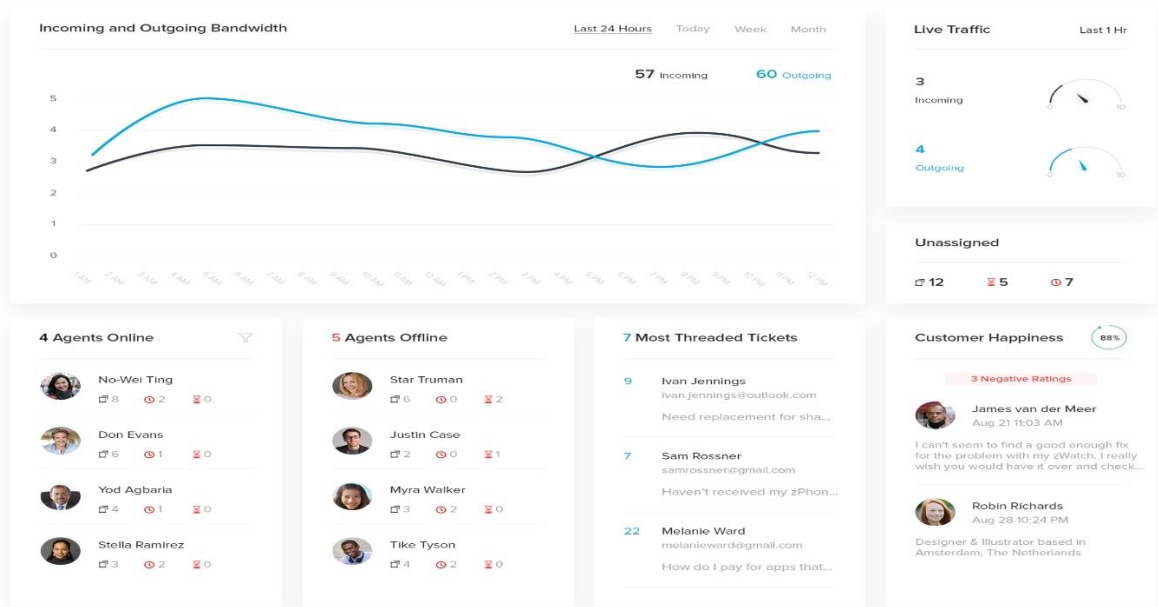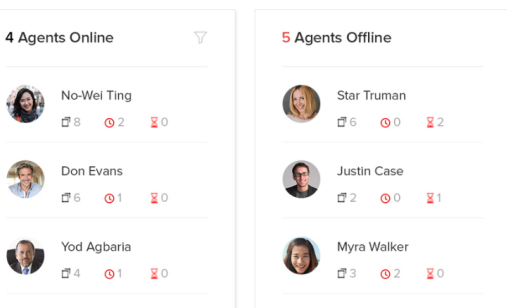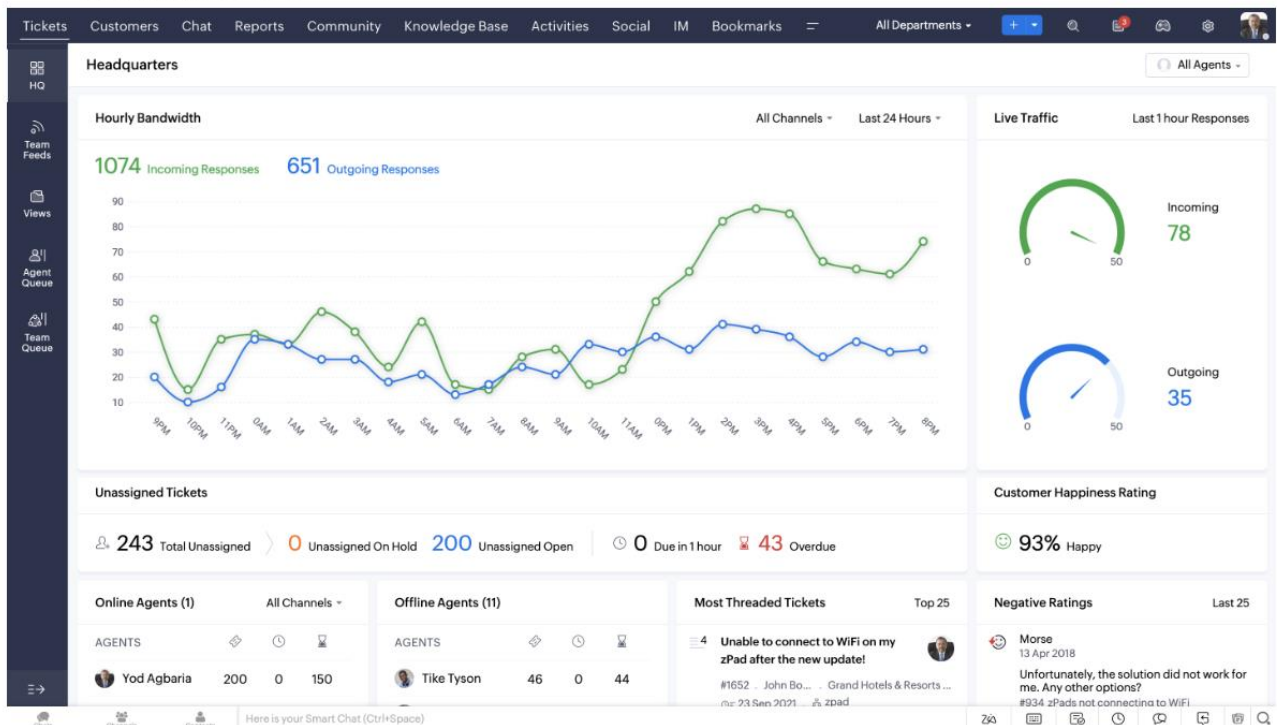

Detailed Contact View

Welcome to your Headquarters.

- **From metric big to small, the HQ has it all.** Pulling individual reports, finding patterns, scoping out improvements and making decisions—a manager's daily routine can be exhausting. The HQ simplifies all of this by bringing vital parameters to the forefront.

Headquarters view

- **Check on agent activity.** Get live updates on your agents' availability. See who's offline, check on their most urgent tickets, and assign those tickets to other agents who are online.

- **Monitor negative feedback and customer happiness**. When a ticket remains unresolved after a lot of interactions, customers are bound to get frustrated. Track these conversations and go that extra mile to turn that frown upside down. Dig deeper into negative feedback, understand what went wrong, fix the situation, and win back your customer.

- **Study your team's ticket traffic**. Keep a watch on ticket traffic and response rates to see if your resources are being used right at different points of the day. These figures will help you identify activity patterns and optimize your team's customer service efforts.

Detailed Contact View

Zoho Assist

Zoho Assist is a one-stop solution for remote support, screen sharing and remote access that helps users access remote desktop of customers or share screen and manage unattended computers.

Zoho Assist empowers business across the globe with secure cloud-based remote support and remote access software to deliver top-notch customer support experience. Establish secure web-based, on-demand connections with remote PCs, laptops, mobile devices, and servers with ease. Elevate your remote support experience with the industry's best remote support solution.

Zoho Assist Features:

Remote Administration Features

- ✓ Screen sharing
- ✓ Instant message
- ✓ Over-the-Internet remote session
- ✓ Remote management of service & workstations
- ✓ Session record
- ✓ Multi-platform remote control
- ✓ File transfer
- ✓ Access to sleeping / powered-off computers
- ✓ Initiate remote control from mobile
- ✓ Centralized management dashboard
- ✓ Annotations

Why use Zoho Assist?

- Enterprise-grade security: TLS 1.2 and AES 256-bit encryption
- Faster implementation and deployment
- Quick adoption and simple to use
- No prior downloads needed for on-demand remote sessions
- No installation needed for technicians to start remote sessions
- Technicians can log in to their accounts from any device to conduct remote sessions
- Privacy-focused
- Cross-platform support

Remote Support On-demand or instant remote support sessions are essential when your remote customers prefer attended sessions, or you support customers regularly across different networks.

- o **File Transfer** Transfer files securely from your computer to your customer's computer or vice versa. File Transfer helps you send installation files to your customer's computer or receive files that require troubleshooting from your customer's computer during an instant remote support session via the remote support software for IT.
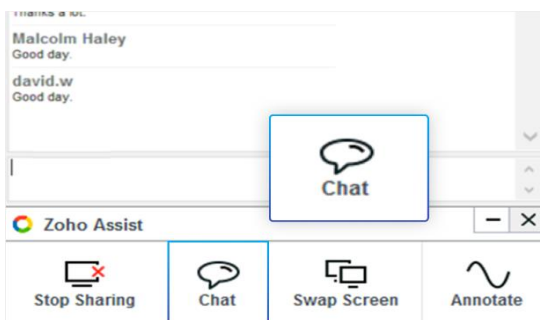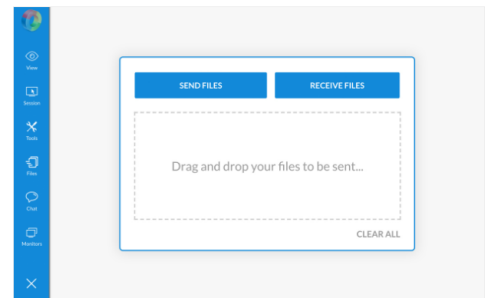
- o **Instant Chat** You and your customer can stay connected throughout an instant remote access session through a chat window. Enjoy the ease of built-in chat rather than juggling external messaging services.
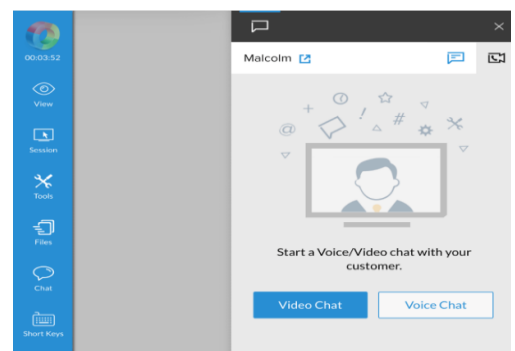
- o **Voice and Video Chat** Interactive remote support sessions help you to resolve issues faster. Connect with your customers on a voice or video chat during a remote support session to troubleshoot issues in a jiffy.

o **Multi-monitor-navigation** There is no doubt that working with multiple monitors boosts productivity. With our hassle-free system for multi-monitor navigation, you can move between monitors of the remote desktop with just a click.
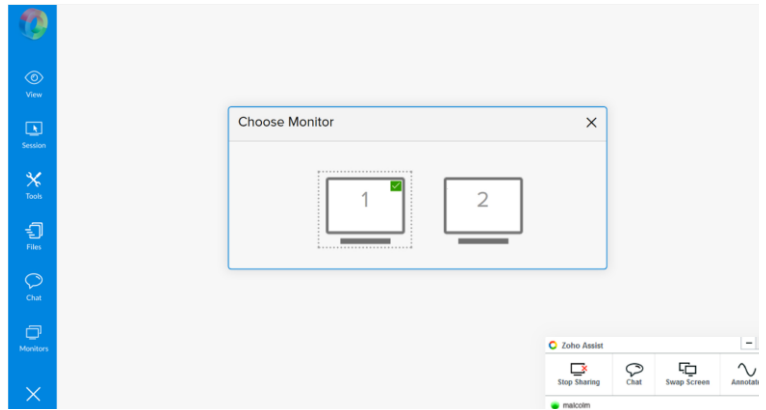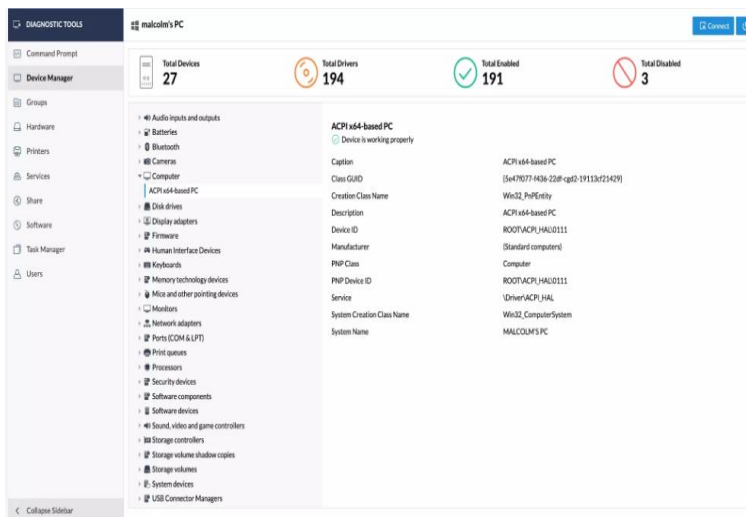
What is a remote desktop?

Remote desktop software can be used to access, control, and share your system from a remote location, almost like you're operating it sitting in front of the device. Zoho Assist is a simple and efficient lightweight remote desktop software that enables a secure and instant remote connection.

o **Simplify your Remote Desktop experience** Remote desktop software should be easy to understand, while ensuring smooth connectivity. Zoho Assist is one of the best remote desktop software that offers secure, cloud-based access to remote desktops through an intuitive user interface. With Assist's cross-platform compatibility, you can connect with remote desktops running any major operating
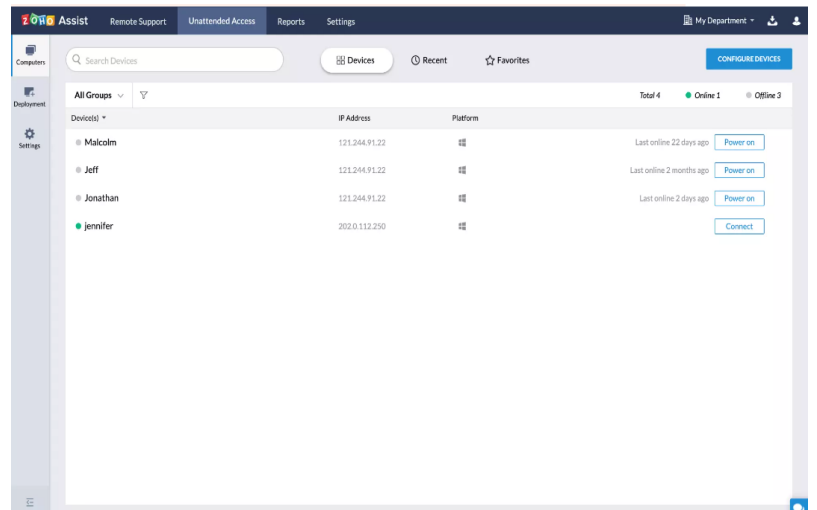
system(Windows/ Mac/ Linux/ Android/ iOS), regardless of which one you're using on your end to connect to remote desktop. With Assist, you don't have to worry about compatibility issues, so you can get right to work, every time.

o **Improve your workplace efficiency with a remote desktop tool.** Zoho Assist, remote desktop connection software allows you to access, control, and manage individual remote workstations in an instant with seamless connectivity. However, when it comes to internal asset management in large corporations, it would be time-consuming to manage and troubleshoot devices individually. To tackle this issue, Zoho Assist, remote desktop app offers mass deployment facilities in which users can configure a large number of devices grouped under a single entity, such as a domain or a workgroup, and troubleshoot devices in a jiffy.

o **Establish a secure remote desktop connection.** Zoho Assist, remote access software runs on state-of-the-art, industrial standards SSL and AES (256-bit) encryption to establish a secure connection with your remote desktops. We also take necessary steps to ensure that all remote connections, along with data transfers, are secured with end-to-end encryption. Moreover, we provide users with the option to blacken the screen on the remote desktop to ensure privacy while accessing your workstation located in an open environment. You can enable our inactive session time-out to end idle remote sessions after a set amount of time.

Schedule Sessions Is your remote customer pressed for time? Schedule a remote support session via the instant remote access software at their preferred time and resolve issues easily. The reminders can help you as well as your customer at the right moment. You can even re-schedule or cancel the session if you need to.
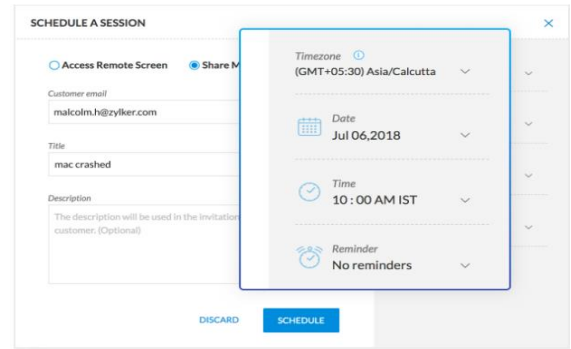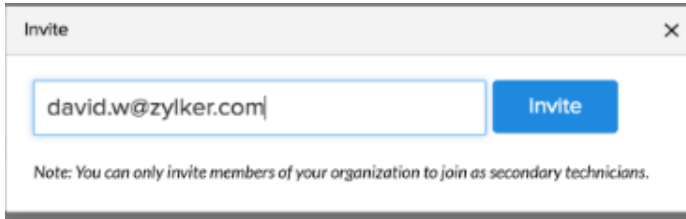
Swap Screen You can view and control the remote screen shared by your customer as well as share your own screen during a live session. This feature will come in handy when you want to train your customers on troubleshooting or any installation process.

- **Screen mirroring** Connect, access, and assist: Use screen mirroring to provide ideal remote support to your customers.
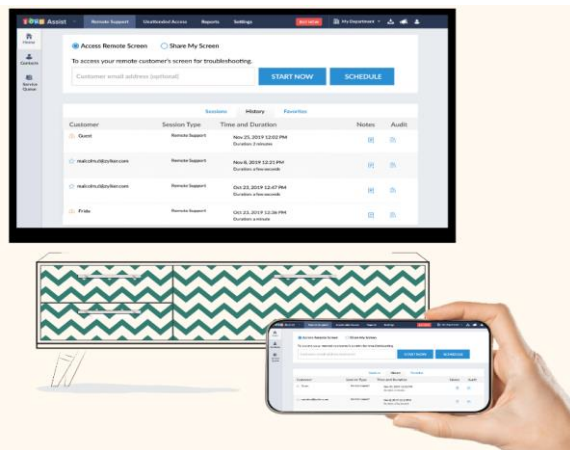
Reboot and Reconnect Reboot remote computers and reconnect to the ongoing remote support session, without losing control. You even have the option to reboot the remote computer in safe mode for debugging if the remote computer is on Windows.

- **Reboot and reconnect to a remote computer in a single session.**

Rebooting a remote computer gives system administrators, MSPs, and technical support technicians greater leeway to resolve issues, fix memory leaks, and terminate malware. Even though rebooting might not always address issues then and there, it resettles your computer to a known state, from which you can start resolving your issues.
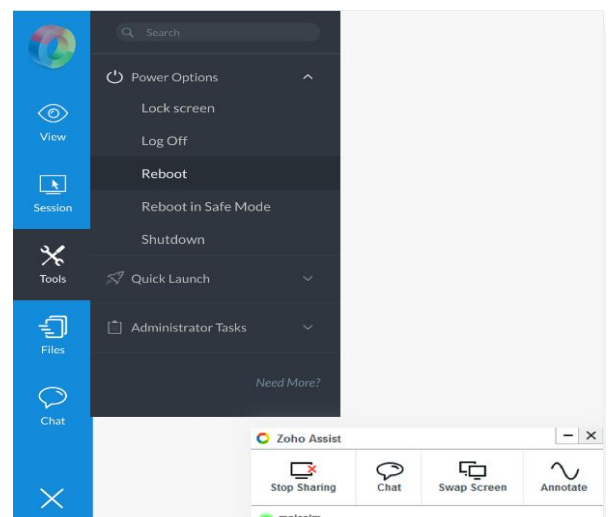
Most software installations, patch installations, and antivirus updates also require system reboot in regular or safe mode. Zoho Assist allows you to reboot and reconnect to a remote computer during on-demand remote support and unattended access sessions without losing control.

- **One support session is all you need to troubleshoot multiple issues.**

Technicians initiate remote support sessions to resolve many issues which might require multiple rebooting. If rebooting a remote computer was to disconnect you from the session, you are forced to initiate multiple sessions for the same set of issues. This takes more of your technicians' time and affects your audit statistics. Zoho Assist helps you to avoid this by helping you to reboot and reconnect to the same session without losing control.

- **Reboot unattended computers without starting a session.**

Updating patches, installing antivirus software, and troubleshooting unattended computers is a day-to-day activity for system administrators. Many of these operations require a reboot and starting a session each time, you want to reboot a remote computer makes all these operations cumbersome. Zoho Assist allows system administrators to put all these problems to rest by helping them to carry out these operations on a large network of unattended computers with ease. You can reboot unattended computers right from the unattended access window without even starting a session.

Ctrl+Alt+Del The crucial Ctrl+Alt+Del of your remote Windows computer is available at a single click. It'll help you to log on, switch users, change the Windows password, and check the task manager.

Invite Technician Need help from another technician to resolve an issue? Zoho Assist, instant remote access software allows you to invite any number of technicians to help you troubleshoot quickly. You can even exit the session and let the invited technician continue supporting the customer.
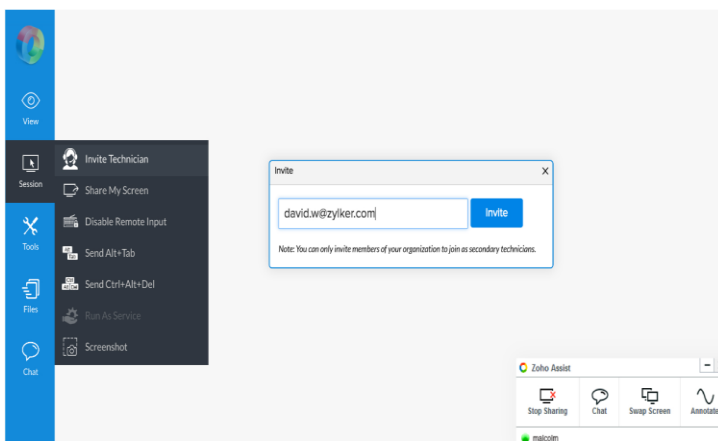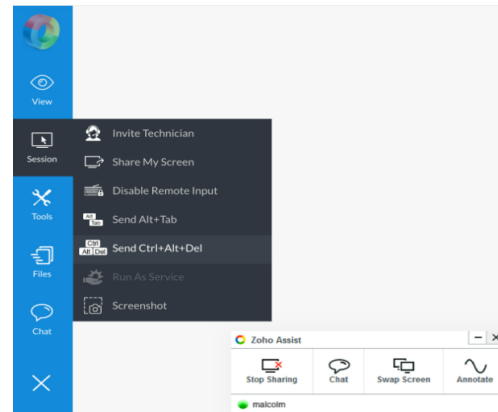
Add Notes Capture the key information of a remote support session as Session Notes that can be referenced later. You can edit and download the saved notes anytime along with the session details.
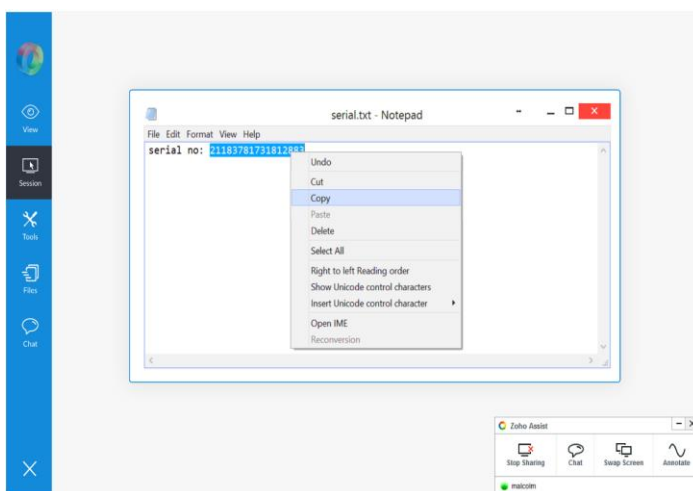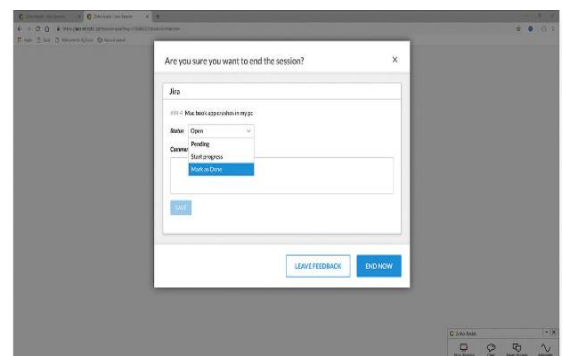
Clipboard Sharing and Security. Your computer's clipboard is shared with the remote computer, helping you to copy anything in your computer and paste it on any file on the remote computer. You can disable clipboard sharing by denying permission to the technician or customer to access each other's clipboards while working with the remote desktop software.

Support anyone remotely on the go. You need not remain tied up your workstation anymore. Simply tap your mobile and start supporting your remote customers and manage unattended computers anytime.
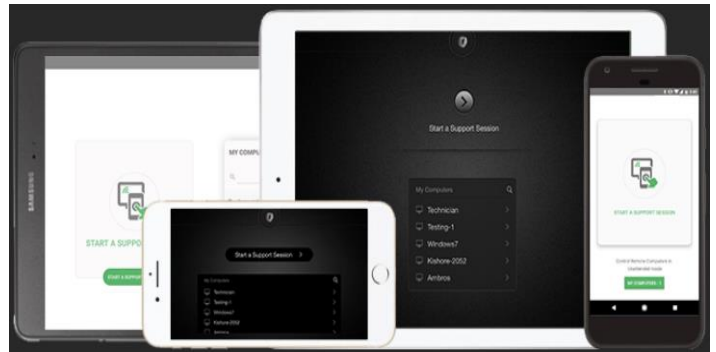
Deliver support from your Android or iOS device

Imagine your PC's touchpad right on your Android or iOS device. Start a remote support session or take control of computers in unattended mode right from your mobile device. Achieve multi-touch gestures like scrolling and zooming. Use your Android/iOS keyboard to type characters to appear on the remote screen.

Features

- Seamless live support that works beyond all major firewalls

- Intuitive touch and gesture controls

- Highly secure remote sessions with 128 bit AES encryption

- Share files across devices

- In-app chat support

- Multi-monitor navigation

- High-resolution screen capturing

- Instant File transfer
- Reboot and reconnect without termination of session
- Wake on LAN to quickly wake up a remote system
- Self-service portal to allow customers to raise requests

- Live Audio and video chat

- Two-factor authentication to protect your account

- Quick Screen sharing with customers

Deliver support to Android or iOS device

Our cross-platform app allows your customers to share their Android or iOS screen with you on iOS, Mac OS, Windows, or Android. Your customer just needs to enter the session key to join the session to start Android or iOS screen sharing sessions.

Features

- View the device as if it's right in front of you

- Take remote control of Samsung devices

- Chat with the technician directly from the app

- Swap screen with the technician

- Pause and resume screen sharing anytime

- Session recording to store complete session
- Annotation to highlight a particular part of the screen
- Customization and rebranding
- Multi-monitor navigation to view multiple monitors

- In-app Diagnostic tools

- Scheduled sessions based on customer availability

- Multiple integrations with service desk and help desk software
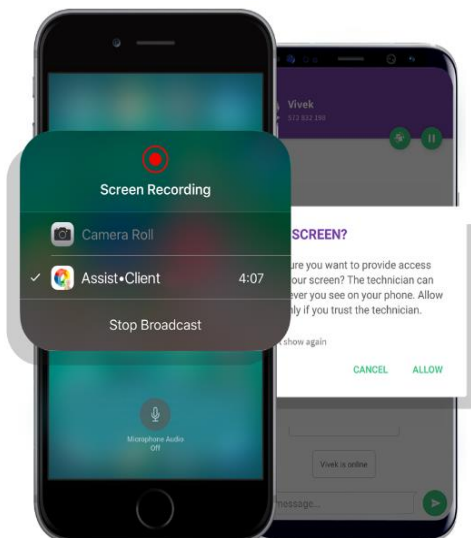
Enable customers to share their screens

Customers could always share the screens of their android devices with you through the Zoho Assist - Customer android app. But with the release of iOS 11, it is possible for your customers to share the screens of their iPhones as well. Now you can clearly understand the issue and offer the right resolution for Android as well as iPhone users.
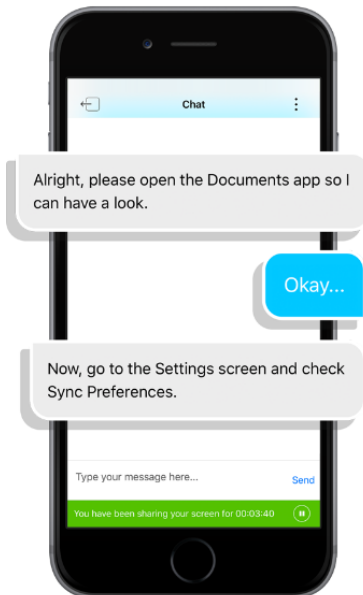
Communicate through instant chat

Use the in-app chat to provide instructions or get more clarity about the issue. Have quick, contextual discussions with the customer and troubleshoot effectively.
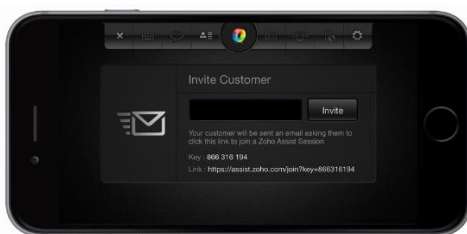
Control Samsung devices remotely

If your customer is using a Samsung device (running Android), you can take remote control of the device and start troubleshooting instantly.

How it works

1. Ask your customers to download the Zoho Assist - Customer app from the App Store or the Play Store.

2. Invite the customer to a remote support session. You can do this either from the web app or the native Zoho Assist app available for the iPhone, iPad, and Android devices. Or, you can directly send the session key to the customer.

4. Now, customers can share their screens or allow you to take control of their device if it's Samsung.

3. The customer accepts the invitation or enters the session key in the Zoho Assist - Customer app.
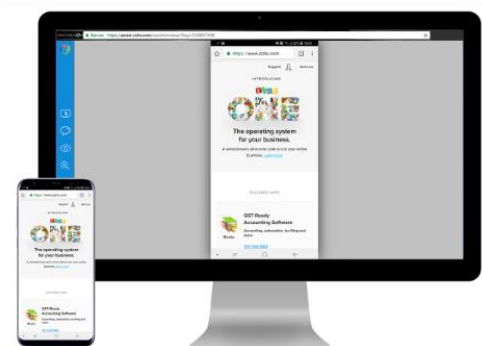
5. Instantly chat with the customer right inside the app anytime during the session.
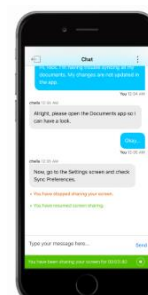
Zoho Lens

Augmented Reality Remote Assistance Software

With Zoho Lens, our augmented reality-based remote assistance software you can take a look at problems in equipment—ranging from plant machinery to servers—at any moment, right from your desk, by accessing a user's smartphone camera at the remote location.

Provide real-time assistance by accessing a smartphone or smart glass camera
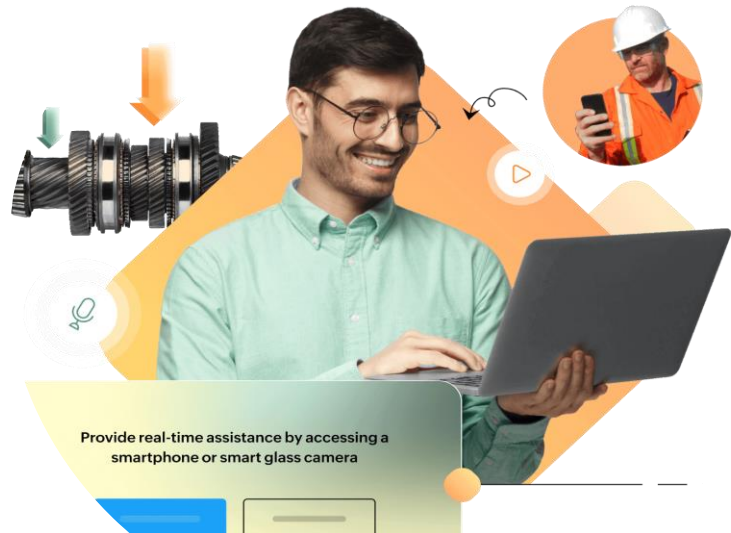
Live Camera Streaming
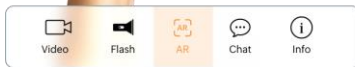
You can offer more valuable advice for solving issues if you can see the problem. With Zoho Lens, experts can view the camera stream of the smartphone or a smart glass at the remote location and lay out work instructions right from their desk.
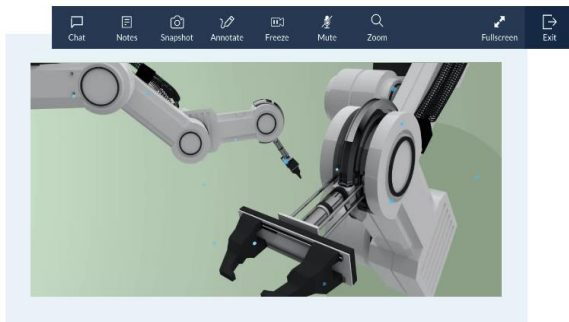
Annotate on 3D Objects

Adding extra information to the incoming stream will enhance communication between an expert and an end user. AR annotations in Zoho Lens allow users to place arrows to mark specific locations on the screen. Experts and technicians at the remote end can also draw on the screen using a pencil tool, and rectangular and elliptical drawing tools, as well as erase and start over using the clear screen option.

Smart Glass Support

At certain times, working with a smartphone limits the work you can do. Our integration with major smart glass vendors allows technicians to receive guidance even while working hands-free. The camera in the smart glass allows the wearer to broadcast the live streaming to the expert, and the wearable headsets provide the perfect platform to communicate verbally.
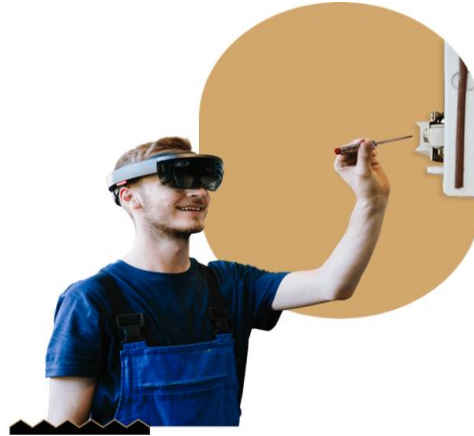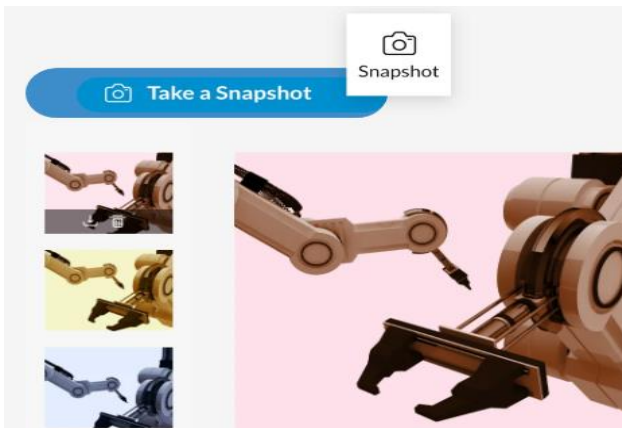

VoIP and Text Chat

You can rely on an interactive visual assistance session through VoIP and text chat. Our built-in chat eliminates the need for external messaging applications during the resolution process.

Freeze Camera Stream

Sometimes you need to observe an issue closely to provide an insightful solution. In Lens, experts can explore, analyze, and discuss technical details of a particular scenario in greater depth by freezing the incoming camera stream while viewing a still image.

Snapshots

Capture snapshots of the camera stream to document specific events during the session, or to analyze an issue further. The snapshots will automatically be saved in the cloud, and can be downloaded at any time during a session.
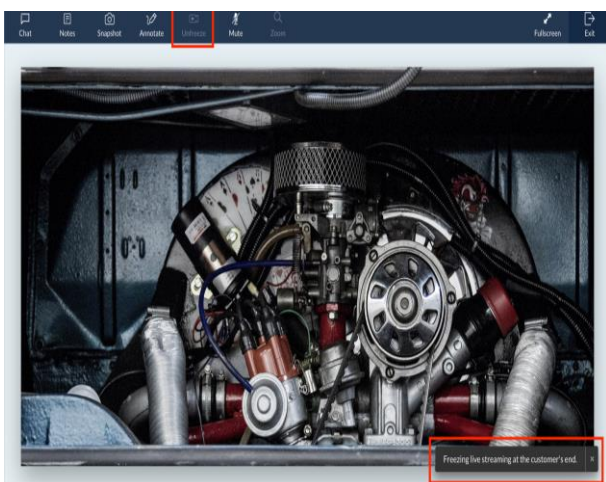
Session Recording

A remote session involves a lot of intricate operations that might not go as planned or sometimes you would want to learn from past challenges. With session recording you can record all sessions initiated in your organization to look back on session proceedings, create comprehensive trails, and document all your sessions to create a knowledge base.

On Demand Lens session #379046171

File Name	File Size	File Type
▶ 379046171.mp4	1.32 MB	Recording
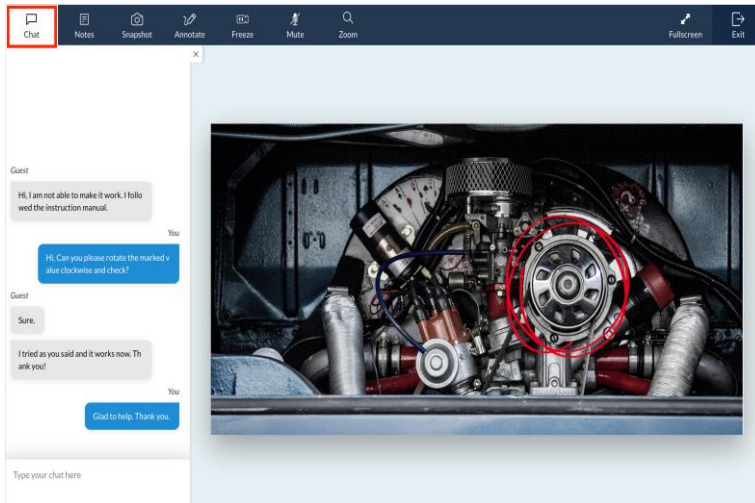
Text Chat

Text chat allows you to interact with the person at the remote end during a session. You will be able to provide work instructions or collaborate to resolve an issue at the remote end.

Notes

The *Notes* option in the technician console allows you to store crucial information during a session. You can also edit the session notes of previously conducted sessions, which is helpful for documentation and auditing purposes. Click here to check out how to edit session notes for previously conducted sessions.
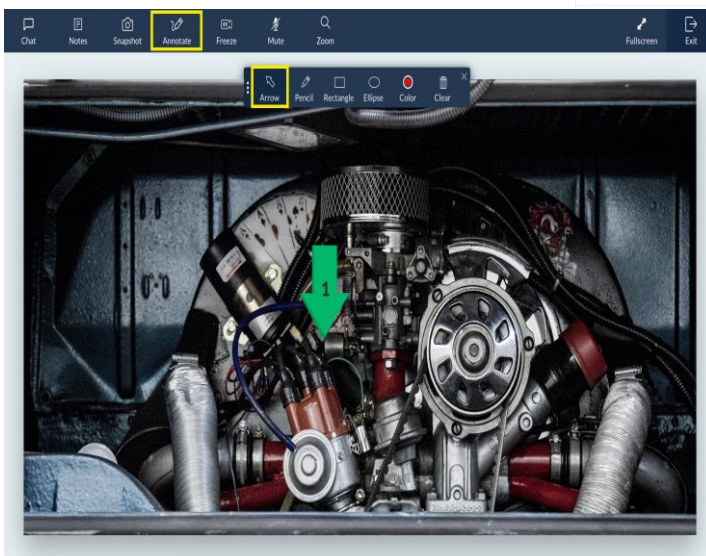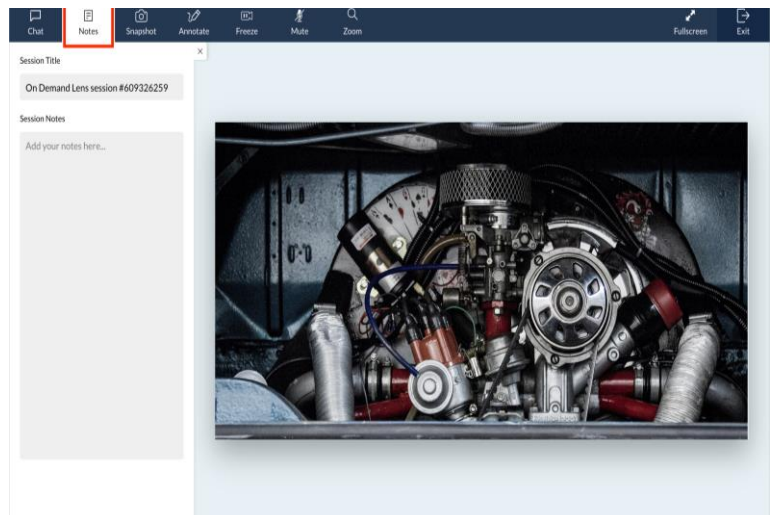
3D Annotation

You can use our 3D annotation to highlight objects in the real world. To make an annotation, tap on a spatial point you want to annotate on any real object. The annotation placed on an object will remain even if the smartphone camera is pointed away from the object. You can currently place 3D arrows on objects. During the session, you'll be able to place up to 20 arrows at any time.

Note: Arrows placed by the technician and

customer will be differentiated based on color.
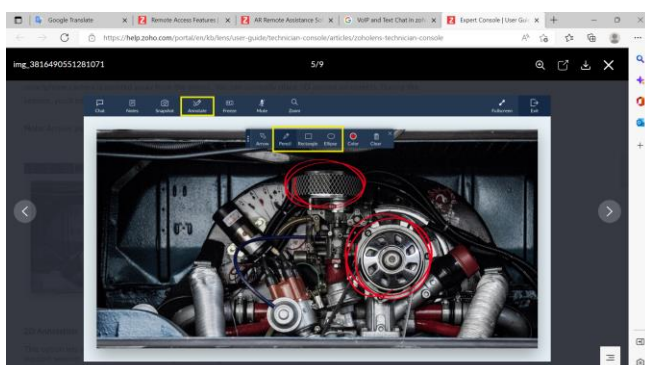
2D Annotation This option lets you to mark up and highlight the remote user's screen while in a screen sharing or remote support session. This feature has a drawing tool, rectangular marquee tool, elliptical marquee tool, an eraser, and a clear screen option.

Mute

You can use the Mute option in the console to turn off your microphone during a session.
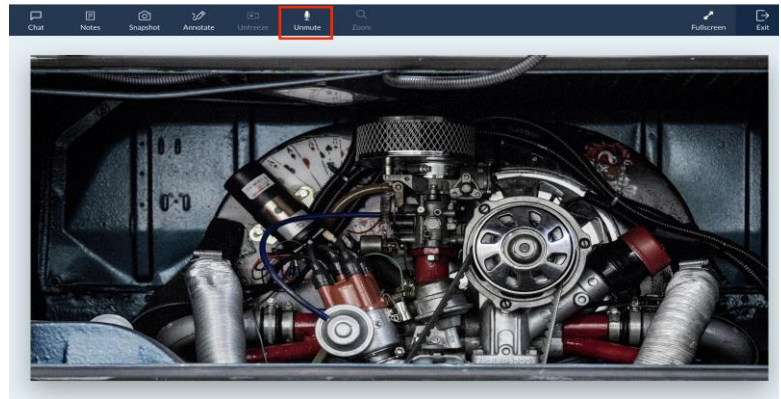
Zoom

The Zoom option allows you to zoom the view of the incoming camera stream in or out. This can be used to see a situation in greater detail.

Invite Technician
Copy the below invitation link and send to another technician

https://lens.zoho.com/secondary-technician/496066784
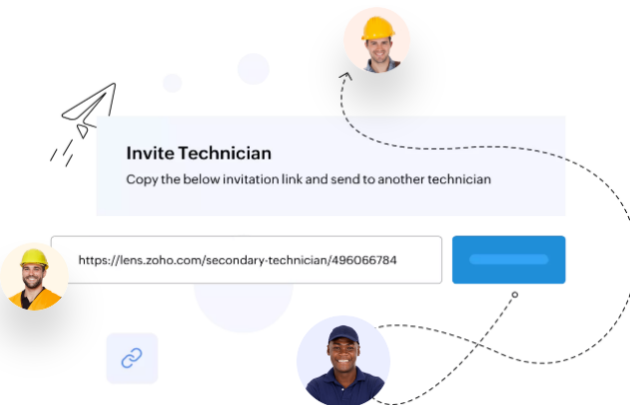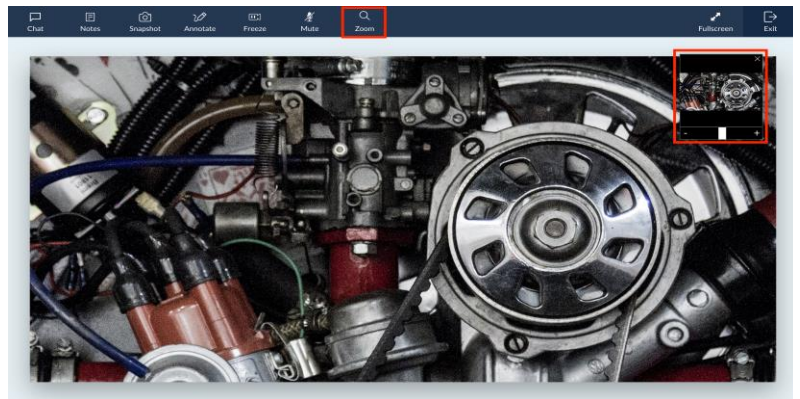
Invite Multiple Participants

Some issues require you to involve people with specialized skillsets. Zoho Lens allows you to collaborate with multiple people in real time on a problem. Call upon colleagues during a remote assistance session by sending email or SMS invites. All invited participants will be able to use AR tools to arrive at a solution at a faster pace.

Provide remote assistance right on the go with the Zoho Lens technician app
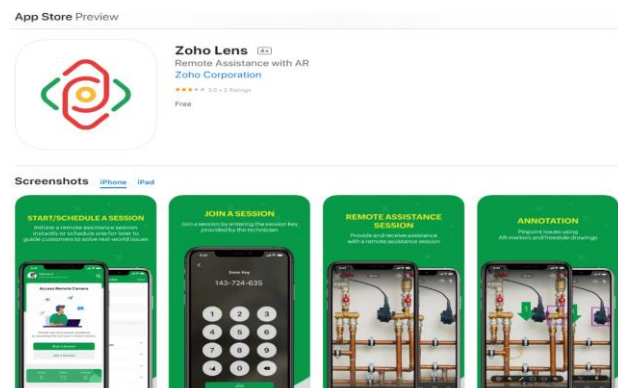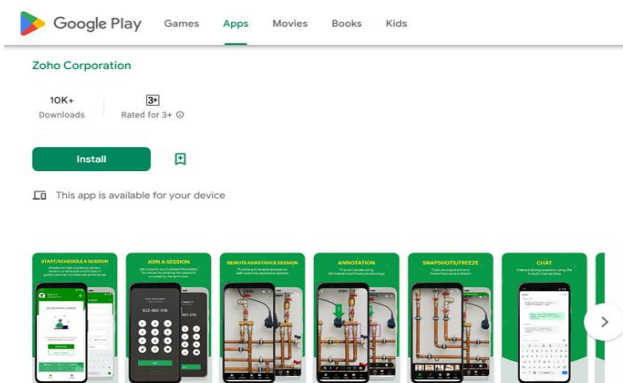
Zoho Lens for Business Solutions:

Field Service การบริการภาคสนาม	**Maintenance and Repair** การซ่อมบำรุงรักษาและซ่อมแซม	**Manufacturing** การผลิต	**ZOHO Lens**
Automotive ยานยนต์	**Health Care** การดูแลสุขภาพลูกค้า	**Insurance** การประกัน	**Customer Service** การบริการลูกค้า

Augmented Reality Software for Insurance Claims

An insurance life cycle usually has a long waiting and processing period. In most cases, this is due to site visits and getting the right data for validating claims. Zoho Lens, our visual assistance software with augmented reality, allows you to reduce your life cycle time by cutting adjuster visits and allowing experts to

Visual remote assistance software for healthcare professionals

Zoho Lens allows healthcare professionals and medical device manufacturers to share timely medical information with patients and nursing staff and assist them in the repair or use of medical devices.

Maintenance (Field Services) Making remote medical devices serving possible

Manufacturing, maintenance, and repair of medical devices requires a high degree of specialization and is highly regulated. Zoho Lens allows device manufacturers to provide health care professionals with remote assistance for usage and remote maintenance. It also allows them to carry out basic repairs through augmented reality. This significantly boosts operational efficiency and increases machine uptime.
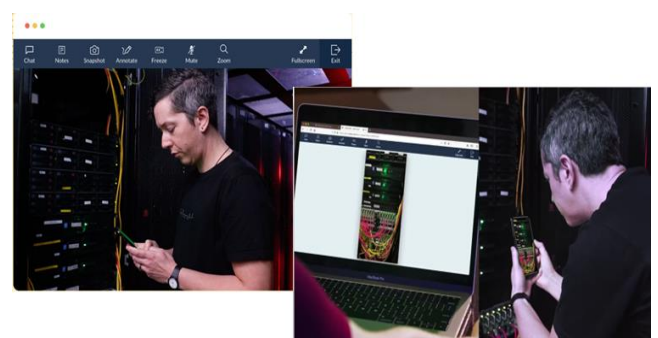
Call Center
Zoho Voice

Deliver superior customer service. Launch a world-class contact center and empower your organization to meet the evolving customer and prospect expectations.

What is a contact center?

A contact center acts as a primary contact point for businesses, and it provides customers and prospects with access to information, expertise, and resources in real time through multiple communication channels. A cloud-based contact center software like Zoho Voice allows you to manage customer communication from anywhere and on any device through the internet.

Bringing the power of cloud innovation to your communication platform

- ✓ Advance call routing
- ✓ Seamless integrations Zoho CRM/Zoho Desk
- ✓ Mobile contact center solution
- ✓ Two-way SMS services
- ✓ Holistic reporting and analytics
- ✓ Improved flexibility and scalability
- ✓ Assured call quality
- ✓ Round-the-clock availability
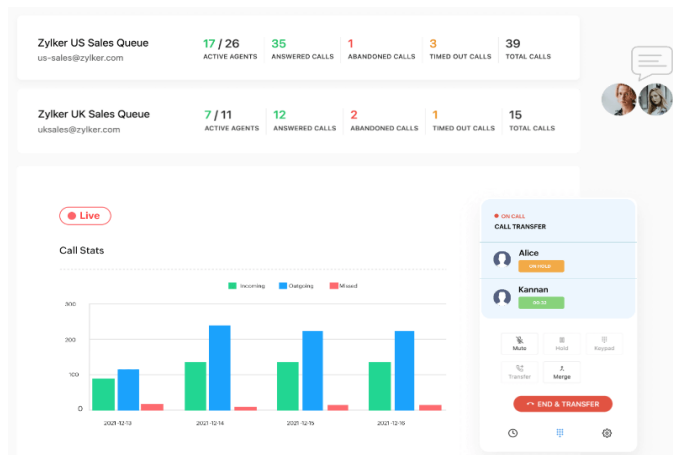- ✓ Regulatory compliance

Explore our popular features

- ✓ Virtual phone numbers
- ✓ Interactive Voice Response (IVR)
- ✓ Call queues
- ✓ Queue performance
- ✓ Call listening, whispering, and barging
- ✓ Call transfer
- ✓ Voicemails and call back
- ✓ Power dialer
- ✓ Post-interaction CSAT rating
- ✓ Call disposition
- ✓ Call notes
- ✓ Call analytics

Virtual phone numbers

Get personal, local, and toll-free numbers from 100+ countries. Allow your customers to call you at standard local rates or free of cost.

Call queues Organize your agents into teams and easily route calls to the relevant group. Choose whether they'll receive calls simultaneously or in sequential order.

Call listening, whispering, and barging Quietly tune in to calls and monitor them in real time. Interact with your agents behind the scenes or intervene on live calls to ensure call quality and elevate customer satisfaction.

Interactive Voice Response (IVR) Configure multilevel IVR trees to help your callers reach the right team or agent. Welcome your callers with custom messages by setting up a text-to-speech recording or uploading an audio file.

Queue performance Closely monitor the performance of various agent teams by tracking special KPIs, such as average call duration, maximum waiting time, and longest call.

Call transfer Transfer a call to another agent or queue if you need help handling a caller's request or if the caller wants to reach out to a different agent. Merge the calls to enable three-way interactions.

Voicemails and call back Allow your customers to leave a voicemail when you're unavailable to pick their calls. Reach out to them swiftly with easy call back capabilities.

Power dialer Automate your outbound calls with outbound campaigns and improve agent productivity by refining the wait time between calls to leads and prospects.

Call disposition Easily identify call outcomes and categorize them accordingly. Track the call trends to identify areas for improvement.

Post-interaction CSAT rating Measure customer satisfaction by allowing callers to rate the quality of service offered by your agents.

Call notes Record the key points of your conversations during a live call and easily access them later for regular follow-ups.

Call analytics Make data-driven decisions with KPIs to measure productivity, detect any gaps in your customer interactions, and improve efficiency.

Features

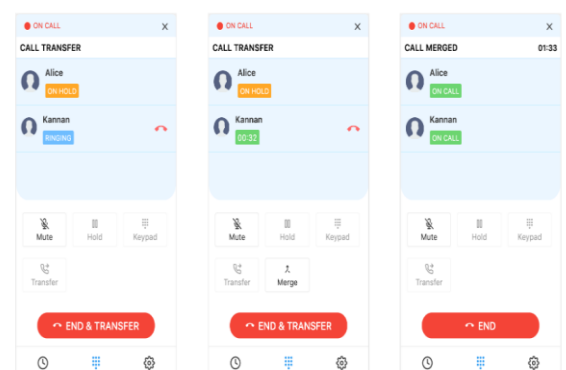Everything you need to make your business communication seamless.

Contact Center

- **Local land toll-free numbers** Make it easy for your customers to reach you. Get local and toll-free numbers in your country, or any country in which your business operates. Toll-free numbers are free of charge for all callers.
- **Personal numbers** Provide individual users with a personal number in the local area code you want. Get unlimited free incoming calls worldwide.
- **Contacts module** Import contacts in bulk, Centralize and seamlessly manage company-wide contacts. View call logs of specific contacts to track call records, gain insights, trace trends, and identify gaps and strengths in your customer interactions.
- **Inbound service** Receive calls from your customers all over the world, from both mobile and landline numbers. Receive calls directly or configure IVRs to direct your customers to the right team.
- **Outbound service** Initiate cost-effective outbound calls to both mobile and landline numbers around the globe. And if inbound service is all you need, we've got you covered. Just disable the outbound service, and you're good to go.
- **Two-way SMS** Send and receive SMS with voice and SMS-enabled numbers. Strike up a quick conversation with your customers or effortlessly send promotional messages to multiple customers at once.
- **Interactive Voice Response (IVR)** Set up IVRs and automatically guide your customers to the desired team, so you can save time while handling requests. Welcome your callers with custom messages to give your business a professional touch.

Transferring a call is easy. Once you receive the call, click the Transfer button in the dial pad. Now, search for the agent you want to transfer the call to and click Call.
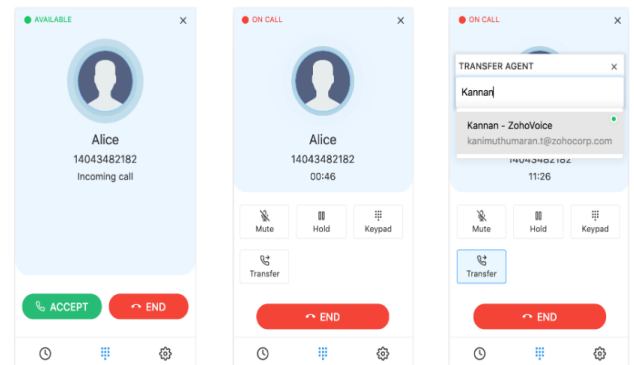
Explain the caller's request to the agent and click the Merge button to merge the calls. Finally, click the End button to completely transfer the call to the other agent. You can check out the details of all your transferred calls in the Logs page.

- **Call queues** Organize your agents into teams to easily route calls to the relevant group. Choose whether they'll receive calls simultaneously or in sequential order.
- **Queue performance** Closely monitor the performance of various agent teams by tracking special KPIs.
- **Live-call status** Keep track of the status of all live calls, and check on who handled particular calls, as well their duration.
- **Call listening, whispering, and barging** Quietly tune in to calls and monitor them in real time. Interact with your agents behind the scenes or intervene on live calls to ensure call quality and elevate customer satisfaction.
- **Number blocking** Blick spam numbers to avoid unwanted calls. Keep your phone system ready for calls that really matter.
- **Power dialer** Automate your outbound calls with outbound campaigns and improve agent productivity by refining the wait time between calls to leads and prospects.

- **Call disposition** Easily identify call outcomes and categorize them accordingly. Track the call trends to identify areas for improvement.
- **Call notes** Record the key points of your conversations during a live call and easily access them later for regular follow-ups.
- **Direct extension dialing** Make your agents instantly accessible with dedicated extension numbers. Save your customers' time and energy by providing them with direct dial-in extensions to access the appropriate line.
- **Call forwarding** Easily reroute your calls to a number of your choice. Support customers outside your business hours by forwarding calls to active agents.
- **Call transfer** Transfer calls to agents or queues and get the right person on the line. Transfer a call to a colleague if you need help handling a caller's request or if the caller wants to reach out to a different agent.
- **Call recording** Record your calls and analyze them later to keep the quality of your service in check.
- **Business hours** Define time zone-specific working hours for each phone number and route calls only during business hours. Request callers to leave a voicemail through text or audio message when they call you after working hours.
- **Holidays** Specify all your holiday dates and direct callers to your voicemail when they call you on them. Configure holidays manually or select from predefined lists such as US holidays. UK holidays, and so on.
- **Voicemail** Enable voicemail and swiftly get back to your customers when you miss their calls.
- **Voicemail transcription** Instantly transcribe your voicemails to text so you can quickly absorb the information while handling back-to-back calls.
- **Voicemail drop** Effortlessly leave pre-recorded voicemails for different prospects. Save time by eliminating the need to record separate voicemails for every lead you contact.
- **Call action handler** Don't keep your customers waiting. Predefine what needs to be done when an agent is busy, and assign subagents to answer calls or divert them to voicemail.
- **Call wrap-up time** Set a window of time for your agents to finish up all after-call activities. Ensure agents have time to refresh and prepare for the next call.
- **Feedback** rating Allow callers to rate the quality of service offered by your agents. Check the ratings offered by your agents. Check the ratings in the call logs. Ratings rang from 1 to 5.
- **Agent-to-agent calling** Reach a colleague instantly using extension dialing in the app, and stay connected with remote teams at a moment's notice.
- **Multilanguage messages** Configure text-to -speech in 16 languages including English, German, French, Spanish, Chinese, Japanese, Dutch, and Russian. Play IVR and Other messages in the language of your choice.
- **Voice selection** Select a female or male voice to play text-to-speech messages and deliver a personalized caller experience.
- **Call logs and reports** Get deeper insights into your call history, and generate reports based on your needs.

Ex. Zoho Voice Report
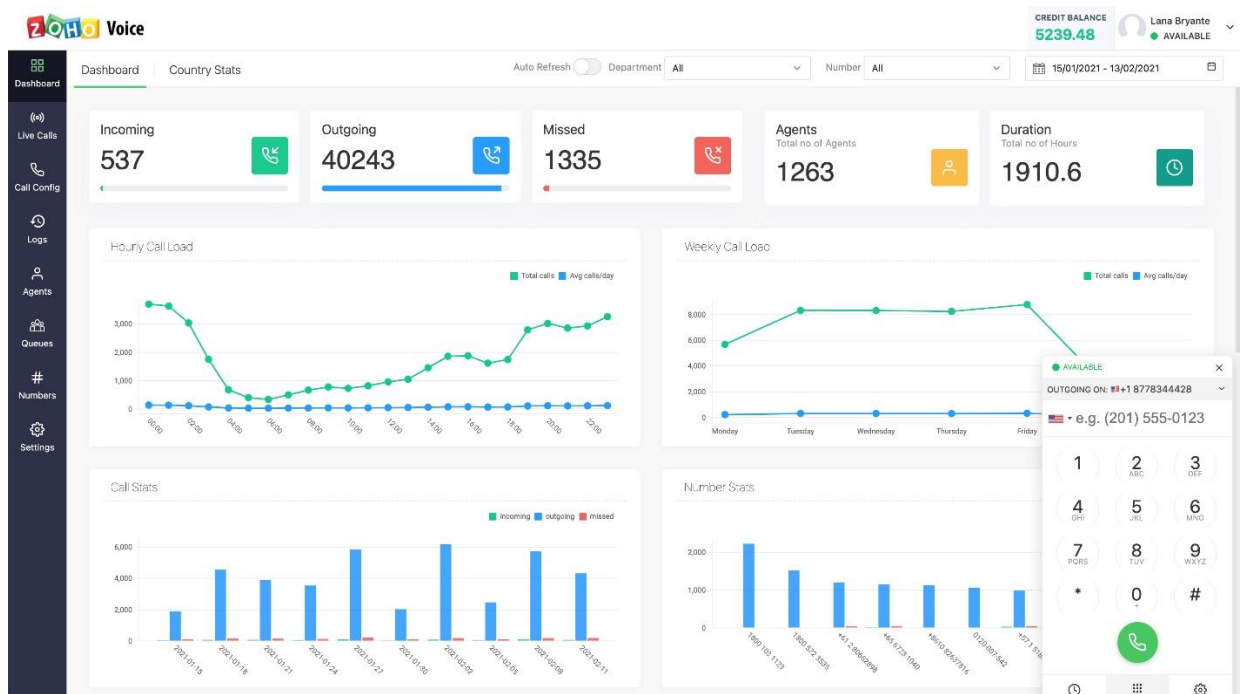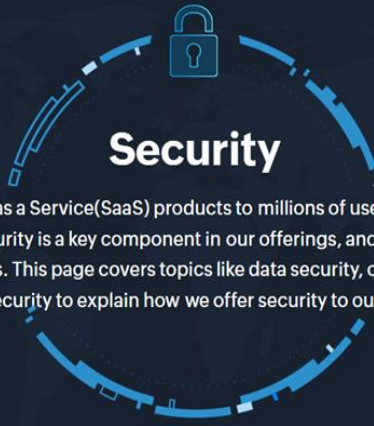
Security

Zoho provides Software as a Service(SaaS) products to millions of users worldwide to solve their business problems. Security is a key component in our offerings, and is reflected in our people, process, and products. This page covers topics like data security, operational security, and physical security to explain how we offer security to our customers.

Our security strategy involves the following components

- Organizational security
- Physical security
- Infrastructure security
- Data security
- Identity and access control
- Operational security
- Incident management
- Responsible disclosures
- Vendor management
- Customer controls for security

ZOHO recognized as a leader in the Nucleus Research CRM Technology Value Matrix 2022.

NUCLEUS RESEARCH

CRM
Value Matrix | April 2022

NUCLEUS RESEARCH

FACILITATOR — LEADER

Greater Usability ▲

- Acumatica
- Zoho
- Zendesk
- SugarCRM
- HubSpot
- Oracle CX Cloud
- Keap
- Microsoft Dynamics 365
- X2CRM
- Pegasystems
- Creatio
- Salesforce
- Maximizer Software
- NexJ
- SAP

CORE PROVIDER — EXPERT

Better Functionality ▶

"Zoho earns the top spot in usability in the 2022 CRM Value Matrix, highlighted by its breadth of functionality, out-of-box customizability, and exceptionally intuitive UI. Over the last few years, Nucleus has continued to see Zoho move upmarket."