IT technicians · Zoho One optimization

Zoho Desk

User and Administrator Manual

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Index — English version

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho Desk features available to agents and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Express, Standard, Professional, Enterprise) and by your organization's configuration.

1.2 What is Zoho Desk?

Zoho Desk is Zoho's customer service software. It brings together, in one place, requests received by email, chat, phone, social media, messaging apps and web forms, as tickets. Agents handle them according to priorities and service level agreements (SLAs), rely on a knowledge base and on Zia AI, and managers track satisfaction and performance.

The help center also lets customers find answers themselves, and submit and track their requests.

1.3 Signing in

1. Go to https://desk.zoho.com (or https://desk.zohocloud.ca if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Desk.
4. Complete multi-factor authentication with Zoho OneAuth if required.
5. Choose the department you work in (selector at the top left).

> **Nuagix tip —** Set your availability status (online, away, offline) when you start your day: assignment rules take it into account.

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2. Interface and navigation

2.1 Interface elements

Element	Purpose
Tickets	List of requests, with views, filters and mass actions
Knowledge Base	Internal and public articles
Customers	Contacts and accounts, with their request history
Activities	Tasks, calls and events linked to tickets
Social	Posts and messages from connected social networks
Chat / IM	Chat and instant messaging conversations
Community	Discussion forums with customers
Analytics	Reports and dashboards
Setup	Settings, mostly reserved for administrators

2.2 Useful landmarks

- Department selector to switch between teams
- Global search (tickets, contacts, articles)
- Work Mode: handle tickets one by one by status, priority or due date
- Real-time notifications and @mentions of colleagues
- Ticket sidebar: customer information, CRM, history, suggested articles

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3. Tickets

3.1 Ticket lifecycle

Status	Meaning
Open	New request or request in progress
On Hold	Waiting for the customer or a third party; the SLA timer can be paused
Escalated	Deadline exceeded or passed to a higher level
Closed	Request resolved
Custom statuses	Added by the administrator (e.g., Waiting for Part)

3.2 Handling a ticket

1. Open the ticket from the My Open Tickets view.
2. Read the conversation and check the sidebar (customer, previous tickets, suggested articles).
3. Click Reply: insert a template, snippet or article as needed.
4. Add a private comment to communicate with colleagues without the customer seeing it.
5. Update the status, priority, category and required fields.
6. Close the ticket once the request is resolved.

> **Nuagix tip —** Use private comments and @mentions rather than internal emails: the whole history stays in the ticket.

3.3 Other actions

- Merge duplicate tickets from the same customer
- Split a ticket that contains several requests
- Transfer to another department or agent
- Add a follower or share the ticket with another department
- Log time spent (Time Entry), billable or not
- Create a task or schedule a reminder

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4. Communication channels

4.1 Supported channels

Channel	How it works
Email	Messages sent to the support address (e.g., support@yourcompany.ca) become tickets
Chat	Chat on your website, directly in Desk or through Zoho SalesIQ
Phone	Inbound and outbound calls through a telephony integration; ticket created automatically
Social media	Facebook, Instagram and X messages and mentions converted into tickets
Instant messaging	WhatsApp, Messenger, Telegram and more, depending on edition
Web forms	Form embedded in your site or the help center
Help center	The customer submits and tracks requests online

4.2 Replying by channel

- The originating channel is shown by an icon on the ticket
- The reply goes out through the same channel (email, social message, messaging app)
- Respect messaging reply windows (e.g., 24-hour window on WhatsApp)
- Calls can be logged with the recording and notes

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5. Views, filters and mass actions

5.1 Ticket views

- System views: My Open Tickets, Unassigned Tickets, Overdue Tickets, My Team's Tickets
- Custom views based on your criteria (status, priority, channel, tag, customer)
- List, table or Kanban display by status
- Sort by due date to handle urgent tickets first

5.2 Creating a custom view

1. Tickets > views menu > Create View.
2. Name the view and add criteria (e.g., Priority = High AND Status = Open).
3. Choose columns and sort order.
4. Share it with your team if you have permission.

5.3 Mass actions

- Assign several tickets to an agent or team
- Change status, priority or a field value
- Send a mass reply (e.g., known incident)
- Merge, mark as spam or delete

> **Caution —** Check your selection before a mass reply: the message goes out immediately to all affected customers.

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6. Macros, templates and snippets

6.1 Productivity tools

Tool	Use
Template	Complete prepared reply for a frequent situation
Snippet	Short block of text inserted into a reply, with variables (customer name, ticket number)
Macro	Series of actions in one click: reply, status change, assignment, tag
Knowledge base article	Article link or content inserted into the reply

6.2 Using a macro

1. Open the ticket.
2. Click the Macros menu (or the lightning icon).
3. Choose the macro (e.g., Request More Information).
4. Review the draft reply and changed fields, then send.

> **Nuagix tip —** Write your templates in French and English and name them clearly (e.g., EN — Password Reset) to find them quickly.

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7. Knowledge base

7.1 Writing an article

1. Knowledge Base > New Article.
2. Choose the category and section.
3. Write the title as a question or task (e.g., How do I reset my password?).
4. Add content, images and attachments.
5. Set visibility: public, registered users, specific groups or agents only.
6. Submit the article for review or publish it, depending on your rights.

7.2 Best practices

- Create an article from a resolved ticket when the question comes up often
- Publish French and English versions (translations) of the same article
- Add keywords to improve search and Zia suggestions
- Review the lowest-rated articles every quarter
- Use internal articles for agent-only procedures

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8. Help center and community

8.1 Help Center

- Branded self-service portal, accessible from your site
- Search of the public knowledge base
- Ticket submission by form and tracking by the customer
- Customer sign-in, including single sign-on, depending on edition
- ASAP widget: help embedded in your site or app

8.2 Community

- Forums where customers ask questions, share ideas and report problems
- Agents answer, mark best answers and convert a topic into a ticket
- Moderation of posts and users
- Gamification (badges, levels), depending on edition

> **Nuagix tip —** An active community reduces repetitive tickets: assign someone to answer there every day.

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9. Zia, the AI assistant

9.1 Zia features

Feature	Purpose
Answer Bot	Suggests articles to customers and agents to answer faster
Sentiment analysis	Detects the positive, neutral or negative tone of customer messages
Field prediction	Suggests the ticket's category, priority or department
Ticket summary	Summarizes a long conversation in a few lines
Reply assistant	Drafts or rephrases a reply, adjusts tone
Auto-tagging	Adds tags based on ticket content
Anomaly detection	Flags an unusual spike in tickets

> **Note —** Zia and generative AI features vary by edition, hosting region and administrator activation. Always review suggested replies before sending.

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10. Customer satisfaction

10.1 Satisfaction ratings

When a ticket is closed or a reply is sent, the customer can rate the service (Good, Okay, Bad) and leave a comment. Ratings appear on the ticket and in Customer Happiness reports.

10.2 Responding to a rating

- A “Bad” rating can automatically reopen the ticket or notify the manager, depending on configuration
- Contact the customer to understand and fix the situation
- Use feedback to improve articles and templates
- More detailed surveys can be sent with Zoho Survey

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11. Reports and dashboards

11.1 Predefined dashboards

- Tickets: incoming volume, open, closed, by channel and priority
- Agents: first response time, resolution time, tickets handled
- SLA: tickets meeting or breaching deadlines
- Satisfaction: ratings and trends

11.2 Creating a report

1. Analytics > Reports > New Report.
2. Choose the module (e.g., Tickets) and report type.
3. Select columns, groupings and filters (e.g., this month, Support department).
4. Add a chart, save it in a folder and share it.
5. Schedule email delivery as needed.

> **Nuagix tip —** Track two simple metrics every week: first response time and satisfaction rate. Together they summarize your service quality well.

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12. Mobile app

12.1 Features

- View, reply to and assign tickets
- Receive notifications of new tickets and mentions
- Browse knowledge base articles
- Use macros and templates
- Radar app for managers: real-time metrics

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13. Best practices

13.1 Nuagix recommendations

- Answer tickets with an approaching SLA deadline first
- Personalize every reply, even from a template
- Document your steps in private comments
- Close resolved tickets and use On Hold for follow-ups
- Create an article for any question asked more than three times
- Reply to Quebec customers in French and respect each contact's preferred language
- Never ask for sensitive information (passwords, card numbers) through a ticket

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Part 2 — Administrator Guide

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14. Agents, roles and profiles

14.1 Key concepts

Element	Controls
Profile	What an agent can do: Administrator, Support Manager, Agent, Newbie Agent, or a custom profile
Role	Which data they see: role hierarchy and access to subordinates' tickets
Department	Separate team or service (e.g., Technical Support, Billing), with its own channels and rules
Team	Group of agents within a department for assignment
Light Agent	Reduced-capacity user: view and comment, without replying to customers

14.2 Adding an agent

1. Setup > User Management > Agents > New Agent.
2. Enter the name and email address.
3. Assign the profile, role and departments.
4. Add the agent to the appropriate teams.
5. The agent receives an invitation; they use a license once active.

> **Note —** In Zoho One, first add the user in the Zoho One console and assign them the Desk app.

14.3 When an employee leaves

1. Reassign their open tickets and tasks to other agents.
2. Remove them from assignment rules, SLA escalations and workflows.
3. Transfer ownership of their articles and scheduled reports.
4. Deactivate the agent to free the license.

> **Caution —** A deactivated agent still named in an escalation rule can prevent important alerts from being received.

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15. Organization, departments and business hours

15.1 Organization settings

1. Setup > General > Company Profile: name, logo, time zone, language, currency (CAD).
2. Setup > Business Hours: opening hours by department.
3. Add Quebec holidays (Holiday List), such as Fête nationale and July 1.
4. Create departments and assign them an email address, agents and a help center.

15.2 Channels to configure

- Email: support addresses by department and forwarding from your mailbox to Desk
- Chat: widget embedded in your site, or Zoho SalesIQ
- Telephony: integration with your provider (e.g., 3CX, RingCentral, Twilio, depending on available integrations)
- Social and messaging: connect the company's pages and accounts
- Web forms: fields, destination department and embed code

> **Nuagix tip —** Check your domain authentication (SPF and DKIM) so replies sent from Desk do not land in spam.

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16. Customization

16.1 Fields and layouts

1. Setup > Customization > Layouts and Fields.
2. Choose the module (Tickets, Contacts, Accounts) and department.
3. Add custom fields (picklist, date, number, lookup, etc.).
4. Set mandatory fields, dependencies and layout rules.
5. Save and test with a dummy ticket.

16.2 Other options

- Custom ticket statuses
- Email and notification templates, in French and English
- Help center customization (theme, domain, languages)
- Custom tabs and modules, depending on edition
- Custom roles and profiles

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17. Automation, SLAs and Blueprint

17.1 Automation tools

Tool	Use
Assignment rules	Assign tickets directly, round robin, by load or by skills
SLAs (service level agreements)	First response and resolution deadlines by priority, with escalations
Workflows	Automatic actions on create or edit (alert, update, task, function)
Time-based automation	Time-driven actions (e.g., close tickets On Hold for 7 days)
Blueprint	Enforce a step-by-step process with fields and actions at each transition
Notifications	Alerts to customers and agents
Custom functions (Deluge)	Custom logic and API calls

17.2 Creating an SLA

1. Setup > Automation > SLAs > New SLA.
2. Choose the department and application criteria (e.g., Account = Gold Customer).
3. Set first response and resolution deadlines by priority, in business hours.
4. Add escalations: notify the agent, the manager, then reassign.
5. Save and place the SLA in the right execution order.

> **Nuagix tip —** Start with two or three simple SLAs (standard, priority, critical): too many rules make management difficult.

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18. Help center and self-service

18.1 Setting up the help center

1. Setup > Channels > Help Center.
2. Choose the theme, logo, colours and custom domain (e.g., help.yourcompany.ca).
3. Enable languages (French, English) and visible modules (knowledge base, community, tickets).
4. Define customer sign-up: open, by invitation or through single sign-on.
5. Configure the Answer Bot and the ASAP widget for your site.

18.2 Guided Conversations

Depending on edition, build automated chat flows with a visual builder: the bot asks questions, suggests articles, collects information and creates a ticket or hands off to an agent when needed.

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19. Integrations

19.1 Zoho integrations

Application	Typical use
Zoho CRM	Sync contacts and accounts; see deals and CRM history on the ticket
Zoho SalesIQ	Website chat and bots; convert chats into tickets
Zoho Projects	Create a task or bug in Projects from a ticket
Zoho Books / Billing	See the customer's invoices and subscriptions
Zoho Survey	Detailed satisfaction surveys
Zoho Analytics	Advanced customer service analytics
Zoho Cliq	Real-time notifications and collaboration

19.2 Other integrations

- Telephony: compatible providers through integrations and Zoho Marketplace
- Slack, Microsoft Teams, Jira and other Zoho Marketplace extensions
- Zoho Flow or Zapier for cross-app automations
- REST API (OAuth 2.0), webhooks and mobile SDK

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20. Security and compliance

20.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Access restriction by IP range
- Encryption of sensitive fields
- Agent idle timeout (automatic sign-out)
- Audit log: history of agent actions and configuration changes
- Data backup and sandbox, depending on edition
- Hosting in the Canadian data center (zohocloud.ca)

20.2 Privacy and Quebec Law 25

- Limit ticket access by department and role
- Mask or encrypt fields containing personal information
- Handle customers' access, correction and deletion requests
- Set a retention period for closed tickets
- Inform customers that calls and chats are recorded

> **Note —** This manual is not legal advice. Confirm your obligations with your legal advisor.

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21. Editions and licenses

21.1 Editions

Edition	For whom
Free	Very small teams: email, simple knowledge base
Express	Small teams: basic channels, simple rules
Standard	SMBs: social media, help center, workflows, SLAs, satisfaction
Professional	Growing teams: telephony, Blueprint, advanced assignment, multiple departments
Enterprise	Organizations: Zia, Guided Conversations, sandbox, advanced customization
Zoho One / CRM Plus	Desk included with the suite's other apps

21.2 Tracking usage

Setup > Subscription shows the edition, agent licenses used, light agents and credits (API, AI). Remove licenses from deactivated agents.

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22. Deployment checklist

22.1 Before going live

- ☐ Company profile, time zone, business hours and Quebec holidays configured
- ☐ Departments, teams, profiles and roles defined
- ☐ Agents added and trained
- ☐ Support email addresses connected and domain authenticated (SPF, DKIM)
- ☐ Channels configured: chat, telephony, social media, web forms
- ☐ Fields, statuses and layouts adapted
- ☐ Assignment rules, SLAs and workflows tested
- ☐ Bilingual templates, snippets and macros created
- ☐ Knowledge base and help center published (French and English)
- ☐ Satisfaction ratings enabled
- ☐ Integrations (CRM, SalesIQ, Projects) configured
- ☐ Privacy settings (Law 25) applied

> **Nuagix tip —** Nuagix can support your team with Zoho Desk setup, integration and training. Book a Zoom meeting: https://nuagix.zohobookings.com/#/andre-martin

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Ticket	Billet
Department	Département
Light Agent	Agent léger
On Hold	En attente
Escalated	Escaladé
Private Comment	Commentaire privé
Template	Modèle
Snippet	Extrait
Macro	Macro
Knowledge Base	Base de connaissances
Help Center	Centre d'aide
Community	Communauté
Assignment Rule	Règle d'assignation
SLA	Entente de niveau de service
Business Hours	Heures d'affaires
Answer Bot	Robot de réponses
Guided Conversation	Conversation guidée
Customer Happiness	Satisfaction des clients
Time Entry	Saisie du temps
Audit Log	Journal d'audit

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