



Zoho Desk Work Flow Guide

STAGE	WHAT TO DO
Email received	Email sent to compliance@nkwalicompliance.co.za creates a Ticket automatically.
Ticket created	Office allocates ticket based on experience, responsibility, and workload.
Agent works ticket	Agent acknowledges within 3 hours using template: Contact Notification → First Response to Client , then actions the work.
Status decision	Choose the correct status: On Hold (waiting), Escalated (needs higher level), or continue working.
Work completed?	If support task finished → Close Ticket . If formal submission or tracked outcome required → Create Case and log handover in ticket notes.
Survey stage	Ticket Closed → Customer Happiness Survey. Case Completed → Case Survey Link.
Performance tracking	Response time, resolution time, and survey scores feed into Teamflect performance tracking.