ZOHO DESK TICKET MANAGEMENT MANUAL

Internal Operations Manual | Zoho Desk (Tickets Module)

Nkwali Compliance Consultants

Version 2.0 | New Employee User Manual (Branded)

SECTION 1 — Orientation & Standards

This manual is the official training reference for how Nkwali Compliance Consultants receives, allocates, works, escalates, and closes support requests using Zoho Desk. It is an operational control manual.

1.1 Why Zoho Desk matters

- Ensures every client request is captured and traceable.
- Protects SLA compliance by tracking response and resolution times.
- Standardises communication using approved templates.
- Provides performance data that links to Teamflect (response time, resolution time, and satisfaction).

1.2 The Golden Rule

If it’s not in Zoho Desk (or in a Case when required), it didn’t happen.

Always work from the Ticket record so communication and evidence are logged automatically.

1.3 Ticket vs Case

Use this decision rule every time you receive a request:

	TICKET (Zoho Desk)	**CASE (Zoho CRM)**
What it is	Support conversation / query / service request	Formal work that must be completed, evidenced, and tracked
Typical outcome	Action → resolve → close ticket	Submission / filing / tracked work → follow-up → close case
Key test	No one will later audit "was it done?"	If someone could ask "Was this done, when, and by whom?" — it's a Case
Survey	Customer Happiness survey on ticket closure	Case survey on case completion

Note: A request can start as a Ticket. If you identify that formal tracked work is required, you must create a Case.

SECTION 2 — System Overview (What you see in Zoho Desk)

2.1 Key areas in Zoho Desk

- Tickets: the main work queue (New, Open/In Progress, On Hold, Escalated, Closed).
- Views: filtered lists used for triage and prioritisation (Unassigned, Due Today, Breaching Soon).
- Conversation tab: where replies and inbound emails appear.

- Resolution tab: where closure summary is recorded (if used in your setup).
- Time Entry tab: where time spent can be logged (if enabled).
- Attachments tab: where documents and evidence are stored.

2.2 Roles & responsibilities

Role	Primary responsibility
Office Allocator / Duty Officer	Monitors new tickets; allocates tickets based on experience, responsibility and workload.
Assigned Agent	Owns the ticket once allocated; acknowledges within 3 hours; completes work; updates status correctly.
Manager / Supervisor (Escalation Level 1)	Oversees ticket and case progress; resolves escalations; prevents SLA breaches.
Level 2 Escalation (Final)	Handles critical/high-risk escalations and unresolved matters.

SECTION 3 — Ticket Entry (Email → Ticket)

3.1 Automatic ticket creation from mailbox

When an email is sent to: compliance@nkwalicompliance.co.za, Zoho Desk automatically creates a Ticket.

- The Ticket includes the sender's details, subject line, and message body.
- Replies to the same email thread continue inside the same Ticket.

3.2 Manual ticket creation (when required)

Create a Ticket manually when the request is received via phone, Teams/WhatsApp, walk-in, or internal verbal instruction.

1. Click Add Ticket.
2. Select the correct Department (if applicable).
3. Complete Requester (contact), Subject, and Description (include source, deadline, and what 'done' looks like).
4. Set Priority correctly so the SLA due date is assigned.
5. Save the Ticket and notify the requester with the Ticket number.

SECTION 4 — Allocation & First Response

4.1 Ticket allocation rules

Someone in the office allocates tickets based on: experience, task responsibility, and workload.

- Do not self-assign tickets unless you are authorised to allocate.
- If you are over capacity, notify the allocator/manager immediately so work can be redistributed.

4.2 First response within 3 hours (MANDATORY)

Once a ticket is allocated to you, you must acknowledge it within 3 hours.

Use Reply (not Reply All) and send the approved template: Contact Notification → First Response to Client.

6. Open the Ticket.
7. Click Reply (NOT Reply All).
8. Click the Insert Template button (the + icon in the reply editor).
9. Select Contact Notification.
10. Select First Response to Client.

11. Review the email for accuracy (name, details, attachments if any).
12. Click Send.

This first response is measured and feeds into Teamflect performance tracking.

SECTION 5 — Working Tickets (How to Manage Your Queue)

5.1 Prioritisation guidelines

Agents must prioritise work using: Priority → Due date → Business impact → People affected.

- Never work strictly 'oldest first' if a higher priority ticket is approaching breach.
- If you cannot meet the due date, escalate early (before breach).

5.2 Status usage during work

Status	Use when	Mandatory action
Open / In Progress	You are actively working the ticket	Keep internal notes updated; send progress updates if needed.
On Hold	You cannot proceed (waiting for client/internal/third party)	Document the blocker and what is needed. Use public reply if waiting on client.
Escalated	SLA risk / high impact / approval needed / specialist help required	Add private note; reassign or notify escalation level.
Closed	Work complete and communicated	Send final message before closing; survey triggers immediately.

5.3 Replying rules (public vs internal)

- Reply (Public): customer-facing communication only.
- Private Note: internal communication (handover notes, decisions, escalation reasons).
- Never place internal commentary inside a customer reply.

SECTION 6 — SLA, Due Dates & Performance (Teamflect)

6.1 What is measured

- First Response Time (must acknowledge within 3 hours after allocation).
- Resolution Time (time to complete and close the ticket).
- SLA Compliance (breaches are tracked).
- Customer Happiness score (sent automatically on ticket closure).

6.2 Practical SLA rules for agents

13. Check Priority and Due Date immediately when you receive the ticket.
14. If you need input from the client, request it early and set status to On Hold.
15. If you need internal approval/support, document the blocker and escalate before breach.
16. Never close without a final message (survey triggers instantly).

SECTION 7 — Escalation Rules (Level 1 and Level 2)

7.1 When to escalate

- SLA breach risk (cannot meet due date).

- High priority / major business impact.
- Compliance risk or potential regulatory exposure.
- Client dissatisfaction, repeated follow-ups, or reputational risk.
- You require approval or specialist access/decision.

7.2 How to escalate correctly

17. Add a Private Note: summary, impact, due date, what you have done, and what you need.
18. Change status to Escalated.
19. Reassign or notify Manager/Supervisor (Escalation Level 1).
20. If unresolved or critical, escalate to Level 2.

SECTION 8 — Closing Tickets & Customer Happiness

8.1 When a ticket may be closed

- The request is completed and communicated to the client.
- The client confirmed resolution (or the task is complete and you have advised clearly).
- If the client does not respond after follow-ups: close per office policy and document attempts in a Private Note.

8.2 Close ticket procedure (mandatory)

21. Send final message summarising what was done and confirming completion.
22. Confirm any evidence/attachments are uploaded (if relevant).
23. Set Status to Closed.
24. Confirm the Customer Happiness survey is triggered automatically on closure (system-controlled).

SECTION 9 — Case Creation from a Ticket (When formal tracked work is needed)

If the ticket requires a formal submission or tracked outcome (e.g., FSCA filing, regulator follow-up, licence maintenance), you must create a Case.

25. Create the Case in Zoho CRM using your Case logging rules.
26. Link the Case reference in the Ticket (Private Note) so handover is clear.
27. Once the Case exists and handover is documented, you may close the Ticket if no further support conversation is required.

SECTION 10 — Quick Reference: Status Mini Matrix

Situation	**Status**	**Action**
Waiting for client info/documents	On Hold	Send public request + note what is outstanding
Waiting for internal/third party	On Hold	Add private note + owner + follow-up date
SLA risk / high impact	Escalated	Private note + notify/reassign to Level 1
Critical/unresolved	Escalated (L2)	Escalate to Level 2 with full context
Work complete	Closed	Final message then close (survey triggers)
Formal tracked work required	Create Case	Create Case + document handover in ticket

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Zoho Desk Work Flow Guide

EMAIL RECEIVED	Email sent to compliance@nkwalicompliance.co.za crea
TICKET CREATED	Office allocates ticket based on experience, responsibility, and workload
AGENT WORKS TICKET	Agent acknowledges within 3 hours using 'First Response to Client' template a
STATUS DECISION	Choose: On Hold (waiting), Escalated (needs higher level), or Continue Workin
WORK COMPLETED?	If support task finished → Close Ticket If formal submission or tracked outcome required → Create Case
SURVEY STAGE	Ticket Closed → Customer Happiness Survey Case Completed → Case Survey Link
PERFORMANCE TRACKING	Response time, resolution time, and survey scores feed into Teamflect perform

SECTION 11 — Troubleshooting & FAQs

11.1 Common issues and what to do

- Template not showing: confirm you clicked the Insert Template (+) icon inside Reply.
- Ticket has no due date: confirm Priority is selected; notify allocator/admin if SLA did not apply.
- Wrong requester/contact: update the contact record (or notify admin) and ensure replies go to correct recipient.
- Customer is upset: acknowledge, give a clear next update time, and escalate if risk or reputational impact.

Appendix A — Training checklist (new employee)

- Open tickets view and identify Unassigned vs My Tickets.

- Practice allocation awareness (do not self-assign unless authorised).
- Send First Response to Client template from Reply using the Insert Template (+) icon.
- Place a ticket On Hold with correct public request for information.
- Escalate a ticket with a proper Private Note and reassignment.
- Close a ticket with a final message and confirm survey trigger understanding.
- Explain Ticket vs Case decision rule to a supervisor.