

Scope of Work: Zoho Desk Implementation



System Configuration and Setup

- **Portal Setup:** Configure the main support **portal** (including branding, logo, and custom domains, if applicable).
- **Organizational Settings:** Set up business hours, time zones, and global system preferences.
- **User and Role Management:** Create and configure **user profiles, roles, and permissions** for all support agents and managers.
- **Department Setup:** Define and configure up to **3** departments within Zoho Desk.
- **Assignment Rules:** Implement rules for automatically assigning incoming tickets to the correct agent or team (e.g., Round Robin, Load Balancing).
- **Channels:** Set up the primary support channel(s):
 - **Email Integration:** Connect up to **5** support email addresses (e.g., support@client.com).

Help Center Setup: Configure 1 customer-facing Help Center Base portal.

Training Session: Agent Training: 1 Hour and **Admin Training:** 1 Hour

Out-of-Scope Items

The following items are **excluded** from this Scope of Work and would require a separate change request and fee:

- Any custom **coding (Deluge)**, custom functions, or advanced integrations (e.g., ERP, custom databases).
- Integration with third-party applications (except for the standard email integration).
- Complex customization of the Help Center via CSS/HTML.
- Creation or writing of Knowledge Base articles or customer-facing content.
- AI Chatbot Configuration
- Additional departments/channels/Help center portals setup
- Other channels like Line OA, Zoho Website Chat, Telephone (Zoho Voice), Facebook messenger and Instagram chat are considered out-of-scope unless explicitly added as an optional service.
- Additional Training Sessions
- **Service Level Agreements (SLAs):** Configure standard SLA policies for response and resolution times.
- **Workflows/Blueprint:** Configuring **workflows** (e.g., for ticket closure, escalation, or status change) to automate routine tasks.