

# Contacts

Zoho Assist enables Admins to import their customer contacts into the Zoho Assist console, allowing technicians to easily invite customers to remote sessions either using their email addresses or by selecting their names in the console. Users can also select a contact to look up reports of their previous sessions for auditing and billing purposes. Admins can import contacts from their Google account, Zoho CRM account, or as .csv or .vcf files.

Note : Contacts, whether imported or created by Super Admins and Admins, can be modified or removed by any member within the organization.

## **Feature highlights**

- Import any number of contacts
- Sync multiple Google accounts with Zoho Assist
- Contact list automatically updated when a new email address is added

#### **Import contacts**

Go to https://assist.zoho.com/app/home

- 1. Select **Remote Support** and then **Contacts**.
- 2. Click Import Contact.



You can import contacts from a Google account, Zoho CRM account, or as .csv or .vcf files.

#### Import Contacts

Import contacts from your Google account, Zoho CRM, or from any .csv/xcf files. Once the contacts are imported, the email addresses will be prompted whenever you invite your customers for a remote support session.





Import contacts from your Zoho CRM account.





Supports .csv & .vcf only. File size should be less than 1MB.

### **Importing Google contacts**

- 1. Click Google Import.
- 2. Select the consent check box to import your Google contacts.



3. Select **Allow** to give Zoho local access to your Google accounts.

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						Make sure that you trust Zoho Local You may be sharing sensitive info with this site or app. You		
						can always see or remove access in your Google Account. Learn how Google helps you share data safely.		
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4. Sign in to your Google account to import your contacts.

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(1) Integrations								Forgot email?		
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Your Google contact list has now been imported to Zoho Assist.

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# Importing Zoho CRM contacts

# Click Zoho CRM Import.

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# The Zoho CRM contacts are imported automatically.

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## Importing contacts from .csv or .vcf files

## 1. Click **Contact Import**.

2. Check the consent check box to allow access to your contacts on the desktop.



3. Choose the file to import contacts from.

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When importing contacts, please ensure that your **.csv file** organizes your contact info only using the following **supported headers.** 

Email			
Name			
Mobile			
Work Phone			
Company			
Street			
City			
State			
Country			
Zip Code			

Your contact list has now been imported to Zoho Assist.

## To access your contacts

# Select **Remote Support** and then **Contacts** to display a list of all your contacts.

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Home	All Co	ontacts				Q Search Total: 11 NEW CONTACT V	
Contacts		Name -		Phone	Company		
Service Queue	A	Malcolm D malcolm.d@zylker.com		-			
	С	Frida M frida.m@zylker.com		555-555-5555	Feltz Printing Service (Sample)		
	D	Jonathan jonathan@zylker.com		555-555-5555	Printing Dimensions (Sample)		
	J	James Ijames-venere@chemel.org		555-555-5555	Chemel (Sample)		
	J	John john-buttbenton@gmail.com		555-555-5555	Benton (Sample)		
	J	Josephine joesphine-darakjy@chanay.com		555-555-5555	Chanay (Sample)		
	К	Kris krismarrier@gmail.com		555-555-5555	King (Sample)		
	L	Leota leota-dilliard@hotmail.com		555-555-5555	Commercial Press (Sample)		
	м	Mitsue tollner-morlong@gmail.com		555-555-5555	Morlong Associates (Sample)		
	S	Sage sage-wieser@truhlar.uk		555-555-5555	Truhlar And Truhlar (Sample)		
	S	Simon simonm@chapman.com		555-555-5555	Chapman (Sample)		