Zoho Corporation

Manage Technicians

The manage technicians section allows you (Super Admin/Admin) to grant privileges to technicians to conduct remote support and/or unattended access sessions. All technicians added in your organization can access unattended computers by default. However, granting remote support privilege depends on the number of remote support technician licenses you've purchased. You can choose to change the privileges while sending an invite or even after the technician has joined the organization. Invites can be sent one by one or even to a group of technicians. You can also grant permissions for technicians belonging to specific groups under unattended access.

Steps

- 1. To Invite Technician(s).
- 2. Manage Technicians Custom Role
- 3. To assign roles or add a new custom role
- 4. To start monitoring a remote session

To invite technician(s)

- 1. Go to **Settings** in the top Menu bar.
- 2. Under Organization, select Manage Technicians.
- 3. Click on **INVITE TECHNICIAN**.

ZOHO	Assist Y Remote Support U	Jnattended Access Live Camera Assistance Reports	Settings	🔝 My Department	اي 🕹	*
Q Search	Manage Technicians Man Department	nage Technicians				
Organization	Rebranding Subscription	Users Role(s)			_	
General	Offers	Remote Support Live Camera Assi 4 / 6 Technician(s) 5 / 5 Technic	stance cian(s) Unatt	rended Access		
E Remote support		UPGRADE TECHNICIANS UPGRADE TECH	S/U	Jnlimited Technician(s)		
Durattended Access		Status Role All	~	Q INVITE TECHNICIAN		
Security & Compliance		Users	Role	Departments & Groups		
		Accepted (5)				
(1) Integrations		You (malcolm@zylker.com)	Super Admin	6 Departments & 5 Groups		
		frida@zylker.com	Admin ~	4 Departments & 5 Groups		
		jeff@zylker.com	Technician- Unattended \vee	2 Departments & 2 Groups		
		lisa@zylker.com	Technician \lor	1 Department & 4 Groups		
		jonathan@zylker.com	Technician - External \sim	1 Department & 1 Groups		

4. Choose the tab **Invite one by one** to send invites specifically to technicians.

ZOHO	Assist ~ Remot	te Support Unattended Access	Live Camera Assistance				اله، 🕹	*
Q Search	Manage Technicians Department	Manage Technicians	;					
Organization	Rebranding Subscription	Users Ro	e(s)					
General	Offers	Invite Technicians Invite one by one Bulk Invitat	on			×		
E Remote support		Email	Role	Departments	& Groups	UPGRADE PLAN		
Unattended Access		Add another email	Admin	1 Department	: & 4 Groups) INVITE TECHNICIAN		
Security & Compliance		Accepted (5)			INVITE TECHNICIA	N		

5. Choose the tab **Bulk Invitation** to invite a group of technicians.

ZOHO	Assist ~ Remote	e Support Unattended Access	Live Camera Assistance			🔝 My Department 🛛 📩 📢	a \ 2
Q Search	Manage Technicians Department	Manage Technicians					
Organization	Rebranding Subscription	Users Role(5)				
General	Offers	Invite Technicians	, , ,		×		
E Remote support		Email	Role	Departments & Groups		UPGRADE PLAN	
Dinattended Access		To separate each user, use a comma, a semicolon or press Enter	Admin	✓ 1 Department & 4 Groups	2	INVITE TECHNICIAN	
Security & Compliance							
(1) Integrations					INVITE TECHNICIAN		

- 6. Enter the email address of the technician.
- 7. Choose **Add another email** given below, to add another email address.

ZOHO	Assist ~ Remot	te Support Unattended Access	Live Camera Assistance					ᅶ	۱ <u>س</u> ا	•
Search	Manage Technicians Department	Manage Technicians								
Organization	Rebranding Subscription	Users Role	(s)			_				
General	Offers	Invite Technicians Invite one by one Bulk Invitation	n			×				
E Remote support		Email	Role		Departments & Groups		UPGRADE PLAN			
Durattended		jonathan@zyler.com	Technician	~	1 Department & 4 Groups					
Access		Add another email								
Compliance		Accepted (5)		_		INVITE TECHNICIAN				

8. You can grant access to a custom role by clicking on the Role drop-down box.

ZOHO	Assist 🗸 Remo	ote Support Unattended Access	Live Camera Assistance			🔝 My Department 🛛 🧉	± 🛋	•
Q Search	Manage Technicians Department	Manage Technicians						
Organization	Rebranding Subscription	Users Role(5)					
General	Offers	Invite Technicians Invite one by one Bulk Invitation	1		×			
E Remote support		Email	Role	Departments & Group	S	UPGRADE PLAN		
Durattended Access		jonathan@zyler.com	Technician	1 Department & 4 Gro	ups	2 INVITE TECHNICIAN		
Security &		Add another email			INVITE TECHNICIAN			
Compliance		Accepted (5)						

9. To grant access to all the groups, click **All Groups selected** under Departments & Groups.

ZOHO	Assist 🛛 Remo	te Support Unattended Access	Departments & Groups	×		🖺 My Department 🔥 🛋 💄
Q Search	Manage Technicians Department	Manage Technicians	1/6 Departments selected.	DONE		
Organization	Rebranding	Users Role	Search			
	Offers	Invite Technicians	My Department Groups	All Groups selected.	×	
General		Invite one by one Bulk Invitatio	 Development team 			
Remote support		Email	🗹 QA Team			
D Unattended		jonathan@zyler.com	 Marketing grp Location A 		ps	
Access		Add another email	Sales Team		2	
Security &			Marketing dpt		INVITE TECHNICIAN	
		Accepted (5)	Debugging dpt			
Integrations		You (Marketing		6 Departments & 5 Groups	

10. Or you can select the necessary groups and click **DONE**.

ZOHO	Assist ~ Remot	e Support Unattended Access	Departments & Groups	×		🗈 My Department 🛛 📩 🛋 💄
Q Search	Manage Technicians Department	Manage Technicians	1/6 Departments selected.	DONE		
Organization	Rebranding Subscription	Users Role	Search			
General	Offers	Invite Technicians	 My Department Groups 	All Groups selected. Automate Permissions ⑦	×	
E Remote		Invite one by one Bulk Invitatio	Development teamQA Team			
support		jonathan@zyler.com	Marketing grpLocation A		ps	
Unattended Access		Add another email	Sales Team			
Security & Compliance			Marketing dpt		INVITE TECHNICIAN	
(C) Integrations		Accepted (5) You (Debugging dpt Marketing 		Departments & 5 Groups	

11. Now click **INVITE TECHNICIAN** to send the email invite.

12. If the invited technician already has an account with Zoho, they can click on **ACCEPT** to be a part of the organization.

13. If not, the technician would be redirected to our homepage where they would have to signup with Zoho Assist to be a part of the organization.

Note : The email invitation sent to the technician will expire within 7 days of time.

Manage Technicians - Custom Role

The "Role" option under the manage technician section allows you to assign a designated role to your technicians based on your organizational preferences. You can assign roles such as Super Admin, Admin, and Technician to the members of your organization.

Super Admin - An administrator with access to all privileges.

Admin - An administrator with access to all privileges except that of Rebranding, Two-factor authentication, and Subscription.

Technician - A user with access to conduct Remote Support, Unattended Access, and Screen Sharing sessions.

Privileges	Super Admin	Admin	Technician
Billing	1	×	×
Enable Remote Support/Unattended access	•	•	×
Assign roles	v	v	×
Group Permissions (Unattended access groups)	•	•	×
Preferences	1	1	Limited
Rebranding	1	v	×
Email Templates	ſ	•	×
Integrations	ſ	•	×
Customer Widget	1	1	×
Contacts	1	1	×
Deployment	ſ	•	•
Session Confirmation	ſ	1	×
Wake on LAN	1	1	v

Privileges	Super Admin	Admin	Technician
Reports	•	J.	Self -conducted sessions only

To assign roles or add a new custom role

You can assign roles such as Super Admin, Admin and Technician to the members of your organization. The difference between the Super Admin and the Admin is that, only the Super Admin will have access to the rebranding, subscription and billing details of the account.

- 1. Go to **Settings** in the top Menu bar.
- 2. Under **Organization**, select **Manage Technicians**.
- 3. Select **Role**.
- 4. Click on New Role.

Assist ~ Remote Support	Unattended Access Live Ca	mera Assistance Reports	Settings		<u> My</u> Department	المير 🕹	•
Manage Technicians Mai	nage Technicians						
Rebranding Subscription	Users Role(s)						
Offers	Total: 3				() New Role	1	
	Role	Description		Created by	Actions		
	Super Admin	An administrator with access to	all privileges.	-	0		
	Admin	An administrator with access to Rebranding, Two-factor authen	all privileges except that of ication, and Subscription.		0		
	Technician	A user with access to conduct R Access, and Screen Sharing sess	emote Support, Unattended ions.		0		
	ASSIST V Remote Support Manage Technicians Department Rebranding Subscription Offers	ASSIST V Remote Support Unattended Access Live Ca Manage Technicians Department Rebranding Subscription Offers Users Role(s) Total: 3 Role Super Admin Admin Technician	Assist V Remote Support Unattended Access Live Camera Assistance Reports Manage Technicians Department Rebranding Subscription Offers Total: 3 Role Description Super Admin An administrator with access to Admin Rebranding, Two-factor authent Technician Auser with access to conduct Rebranding, Two-factor authent Technician Auser with access to conduct Rebranding, Two-factor authent Technician	Assist Remote Support Unattended Access Live Camera Assistance Reports Settings Manage Technicians Department Manage Technicians Users Role(s) Image Technicians Subscription Offers Users Role(s) Image Technicians Image Technicians Role Description Super Admin An administrator with access to all privileges. Image Technicians Admin An administrator with access to all privileges except that of Rebranding. Two-factor authentication, and Subscription. Technician A user with access to conduct Remote Support, Unattended Access, and Screen Sharing sessions.	Acsist Remote Support Unattended Access Live Camera Assistance Reports Settings Manage Technicians Department Manage Technicians Manage Technicians Manage Technicians Image Technici	ASSIST Renote Support Unattended Access Live Canera Assistance Reports Settings More Partment Manage Technicians Department Rebording Subscription Offers Offers If the settings <	AcSist Remote Support Unattended Access Live Camera Assistance Reports Settings Lit My Department Manage Technicians Manage Technicians Manage Technicians Users Role(s) Image Technicians <

5. In the new page that appears, fill in the required details such as the custom role name, description and select the permission(s) to be granted.

ZOHO	Assist ~ Remote Support	: Unattended Acce	ess Live Camera Assistance	Reports Se	ettings			🔝 My Department	🕹 🚅	۸ ۲
Q Search	Manage Technicians	Manage Technici	ans							
	Rebranding									1
Organization	Subscription	Users	Role(s)							
General	Offers	Edit role								
emote support		Role name	Remote Support Technician		75 characters left					
Durattended Access		Description	Remote Support Technician who	o can conduct Rem	ote Support sessions	alone				
Security &		Permissions		☑ Re	emote Support	Unattended Access	Screen Share			
compliance			File Transfer				0			
(1) Integrations			Chat			0		-		
			Voice Call				-	-		
			Voice & Video Call				-			
			Run As Service			-	-			
			Blacken Screen				-			
			Disable Remote Input				-			
			l	This will update the	e permissions for all us	ers who have been assigned to this role				

6. Click on **Save** to save your new custom role.

ZOHO	Assist 🗸 Remote Suppo	rt Unattended Acces	s Live Camera Assistance	Reports	Settings			📑 My Department	• ٹ	<u>a</u> \ 💄
Q Search	Manage Technicians Department	Manage Technicia	ins							
Organization	Rebranding Subscription	Users	Role(s)							
General	Offers	Edit role								
E Remote support		Role name	Remote Support Technician		75 chara	cters left				
Durattended Access		Description	Remote Support Technician wh	o can conduct	Remote Suppor	t sessions alone				
Security &		Permissions			Remote Supp	ort Output Unattended Access	Screen Share			
			File Transfer			0				
Integrations			Chat			0	D			
			Voice Call			0	-			
			Voice & Video Call				-			
			Run As Service			-	-			
			Blacken Screen			0	-			
			Disable Remote Input			Ο	-			
_				This will upda	ate the permission	ns for all users who have been assigned to this role	9			

To grant permission to conduct remote support and/or unattended access

- 1. Go to Settings in the top Menu bar.
- 2. Under Organization, select Manage Technicians.
- 3. Select **Role**.
- 4. Click on the edit option to edit/grant permission to conduct remote support and/or unattended access to a

custom role.

ZOHO	Assist ~ Remote Support	Unattended Access Live C	Camera Assistance Reports Settings		📑 My Department	ፊ 📢	1
Q Search	Manage Technicians	Manage Technicians					
Organization	Rebranding						
General	Offers	Total: 4			() New Role		
E Remote support		Role	Description	Created by	Actions		
		Super Admin	An administrator with access to all privileges.	-	0		
Unattended Access		Admin	An administrator with access to all privileges except that of Rebranding, Two-factor authentication, and Subscription.	-	0		
Security & Compliance		Technician	A user with access to conduct Remote Support, Unattended Access, and Screen Sharing sessions.	-	0		
(integrations)		Remote Support Technician	Remote Support Technician who can conduct Remote Support sessions alone	malcom@zylker.com On Jul 26, 2022 2:40 PM	© C 🖉 🗓		
_							

5. Click on **Save** to save your changes.

To define unattended group permissions to technicians

- 1. Go to **Settings** in the top Menu bar.
- 2. Under **Organization** , select **Manage Technicians**.
- 3. Under **Departments & Groups**, click **All** (By default, all groups will be selected).

ZOHO	Assist ~ Remote Support U	Unattended Access Live Camera Assistance Reports	Settings		🛅 My Department 🛛 🎍	· •	2
Q Search	Manage Technicians Department	nage Technicians					
Organization	Rebranding Subscription	Users Role(s)					
General	Offers	Remote Support Live Camera Ass 4 / 6 Technician(s) 5 / 5 Techni	istance cian(s) Unatte	ended Access			
E Remote support		UPGRADE TECHNICIANS UPGRADE TECH	5/U	Inlimited Technician(s)	UPGRADE PLAN		
Durattended Access		Status Role All	~	Q	INVITE TECHNICIAN		
Security & Compliance		Users	Role	Departments & Groups			
compnance		Accepted (5)					
(1) Integrations		You (malcolm@zylker.com)	Super Admin	6 Departments & 5 Groups			
		frida@zylker.com	Admin ~	4 Departments & 5 Groups			
		jeff@zylker.com	Technician- Unattended \vee	2 Departments & 2 Groups			
		lisa@zylker.com	Technician \lor	1 Department & 4 Groups			
		jonathan@zylker.com	Technician - External \sim	1 Department & 1 Groups			

4. Select the necessary groups and click **DONE**.

			Departments & Groups	×		🗈 My Department 🛛 📩 📢	*
Q Search	Manage Technicians Department	Manage Technicians	1/6 Departments selected.	DONE			
Organization	Rebranding Subscription	Users Role	My Department	All Groups selected.			
General	Offers	Invite one by one Bulk Invitation	GroupsDevelopment team	Automate Permissions 🕐 🛛 🚺	~		
Remote support		Email	QA TeamMarketing grp		_		
Unattended Access		jonathan@zyler.com Add another email	Location ASales Team		ρs		
Security & Compliance			Marketing dpt		INVITE TECHNICIAN		
(C) Integrations		You (Debugging dpt Marketing 		Departments & 5 Groups		

To assign session supervision access to a role

With Session Supervision in Assist, sessions can be monitored if the technician has access to the feature. The technician can monitor the scheduled or ongoing session in view-only mode.

1. Select **Role(s)** and click **New Role** to add a new role.

ZOHO	Assist ~ Remote Support	t Unattended Access Liv	e Camera Assistance Reports	Settings		🛅 My Department	اله 🛃 🕹
Q Search	Manage Technicians	Manage Technicians					
Organization	Rebranding Subscription	Users Role(s)					
General	Offers	Total: 3				() New Role	1
E Remote support		Role	Description		Created by	Actions	1
2		Super Admin	An administrator with access	to all privileges.	-	0	
Access		Admin	An administrator with access Rebranding, Two-factor authe	to all privileges except that of entication, and Subscription.	-	0	
Security & Compliance		Technician	A user with access to conduct Access, and Screen Sharing se	Remote Support, Unattended ssions.	-	0	
(1) Integrations							
_							

2. Enter the role name and description and select **Session Supervision** in the Permission field to assign supervision access to the role. Then, click **Save**.

ZOHO	Assist ~ Remote Sup	port Unattended Access	Live Camera Assistance	Reports	Settings				<u>]</u> My Department	ڈ «	_ \
Q Search	Manage Technicians	Manage Technicians									
Organization	Rebranding	c	lipboard sharing				0	-			
æ	Offers	A	nnotation		-		-				
General		Р	hone Call				-	-			
et Remote support			Remote Support Settings								
P		C	Contacts management					Enabled for Organization \smallsetminus			
Unattended Access		C	Self Service Portal - Announc	ement							
•		C	Inbound Request Delegation								
Compliance		C	Inbound Request Transfer								
(1) Integrations			Session Supervision								
		C	Organizational Reports								
		C	Remote Support - Session Co	unt							
		C	Remote Support - Session Du	ration							
				This will updat	te the permissio	ns for all us	sers who have been assigned to this ro	e			
					S	ave	Cancel				

To start monitoring a remote session

1. Log in to your Zoho Assist account and go to **Remote Support**.

2. Select **Monitor** to start supervising a remote session in view - only mode.

Email address Problem description OS Status + Duration Technician Department Image: Service	hitor
service Queue ryan.athanasius@aceadd.com VPN issue Initiated 00 min(s) Bran My dept	hitor
Queue	

Note:

- You cannot create or select unattended computer groups in Free Plan.
- The Super Admin can choose to receive notifications through email on changes made by the Admin by enabling Notify me on technician management alerts under Settings > Preferences.