Session Notes

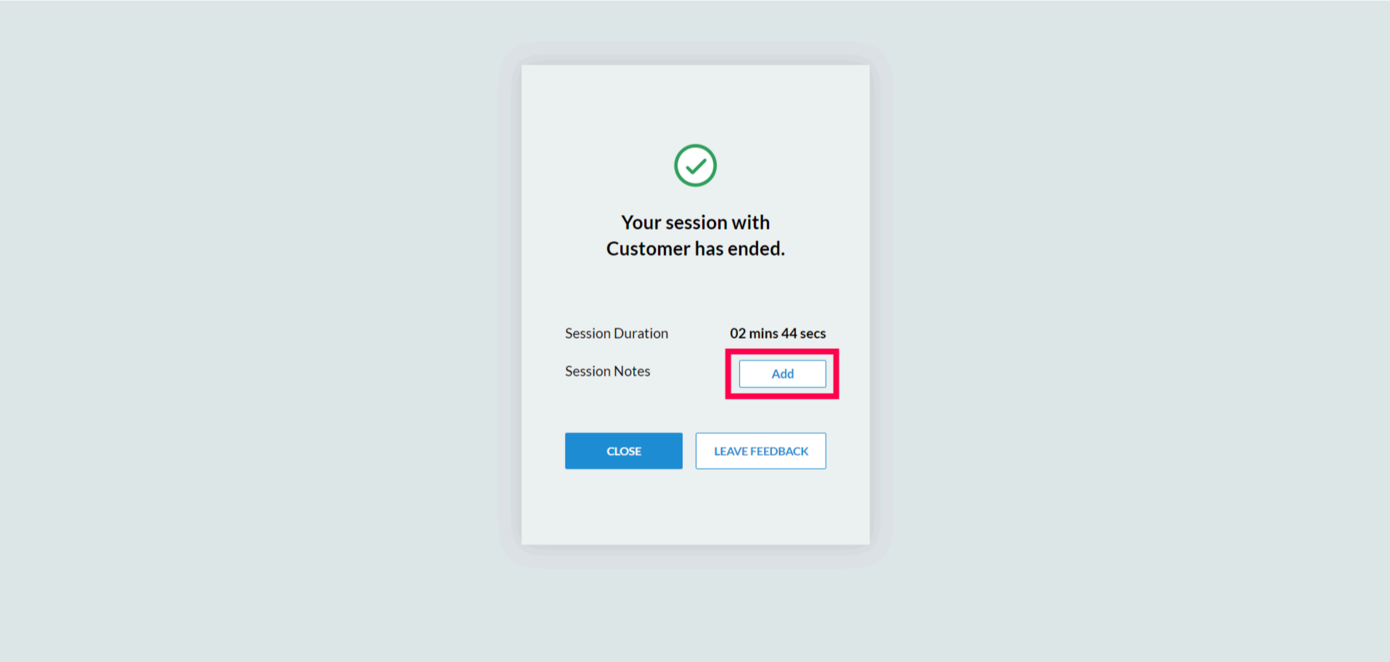
Session Notes enables the technician to store crucial information, case history and comments at the end of every remote support or unattended access session. It can be used by both technicians and Administrator for auditing purposes and future reference. You can edit the notes anytime and download them when required.

Feature Highlights

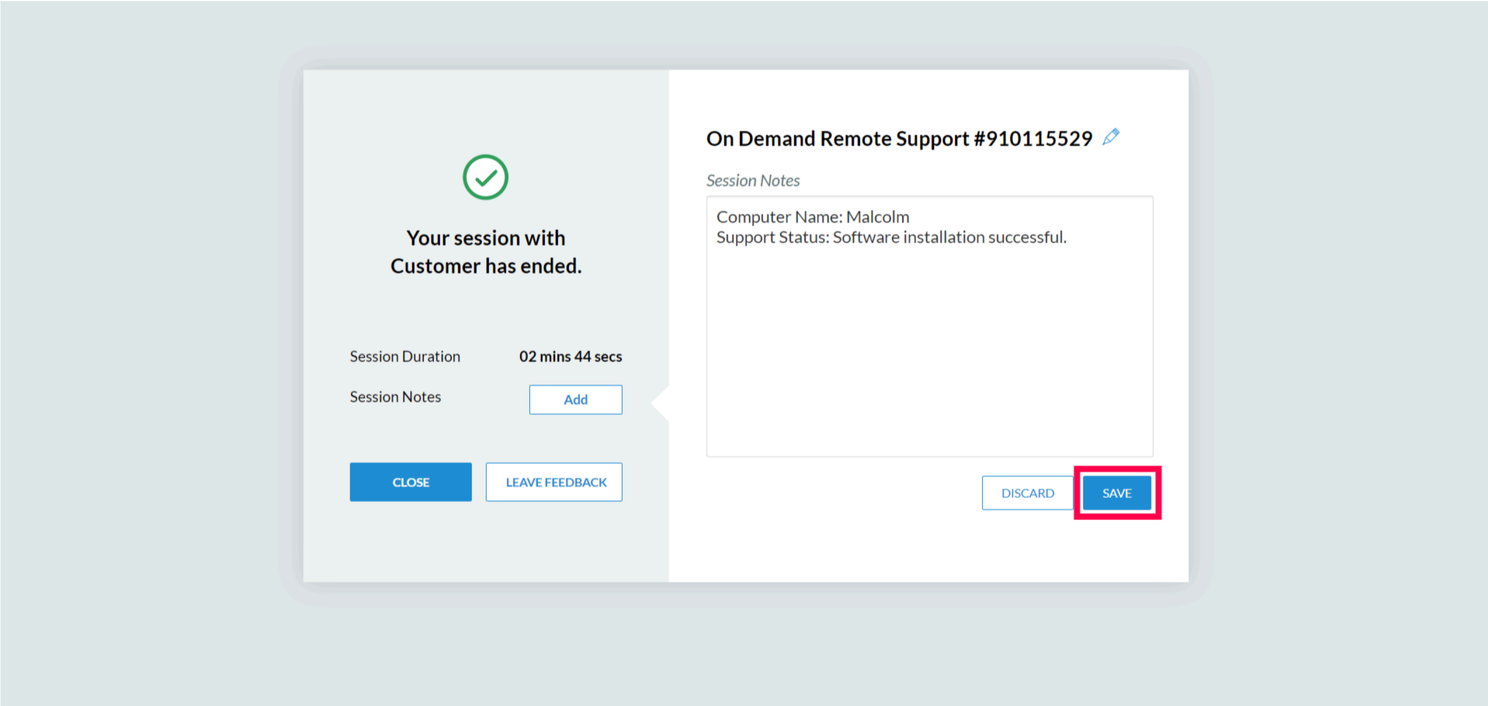
- Create, edit and update the notes whenever you want to.
- View and download the session notes as .csv file.

How to add a session note

1. Once the session is over, an end session dialog will open up.
2. Choose **Add Session Note**.

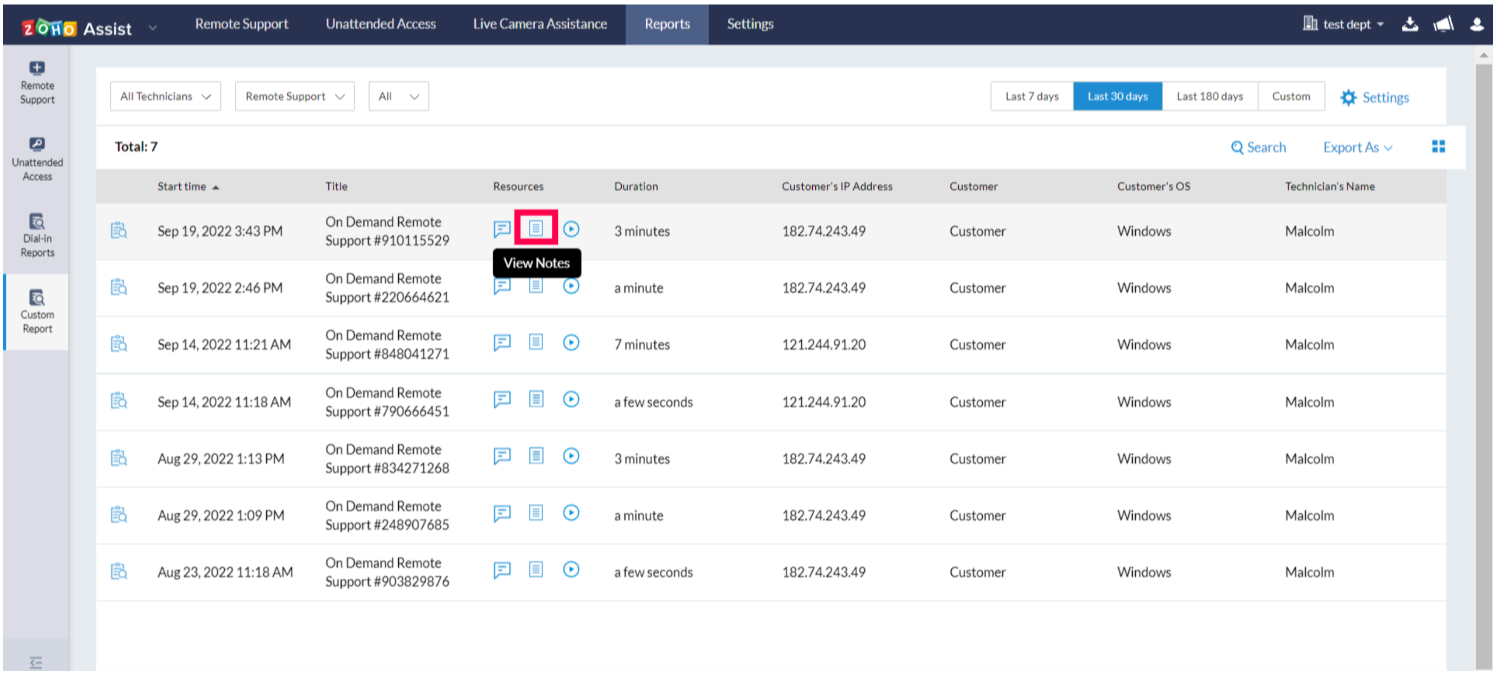


3. Enter the Session name.
4. Enter the necessary text and click **SAVE**.



How to add/edit session notes for a closed session

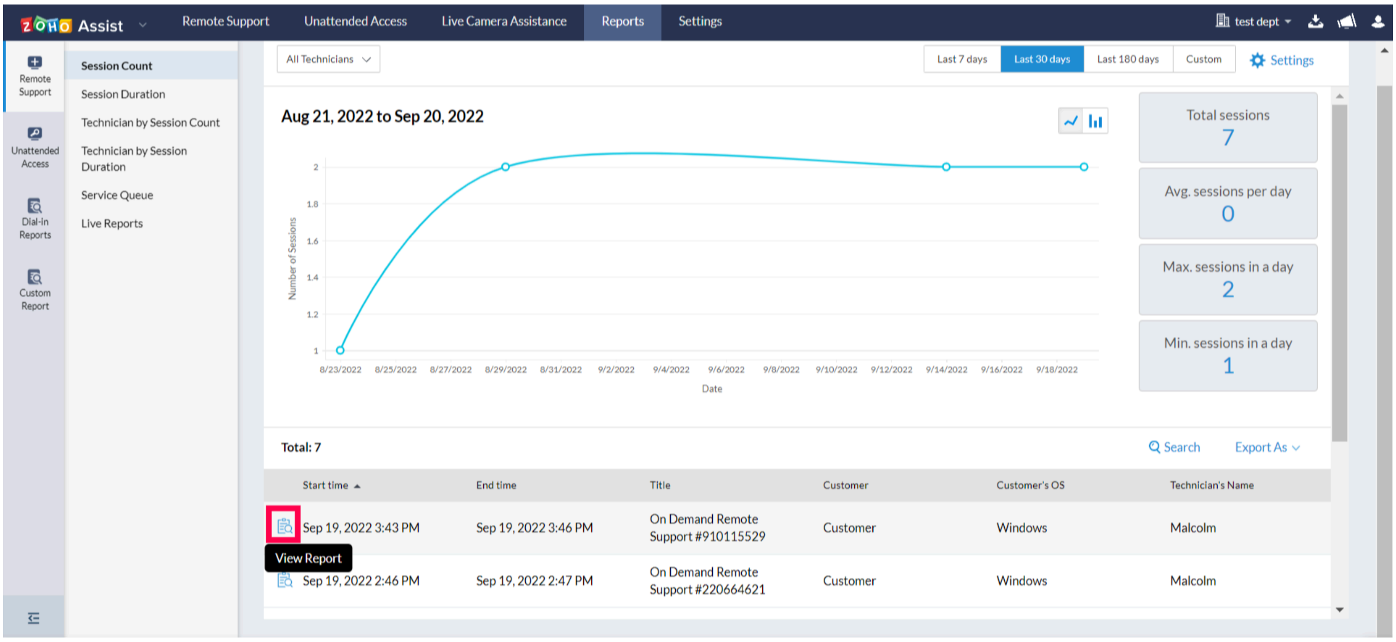
1. Select **Reports** in the top pane of the window
2. Click **Custom Reports** in the left side of he screen.
3. Click **View Notes** given beside the respective session and edit/add the content.



4. Click **SAVE** to update the session note.

How to download the session notes

1. Navigate to **Reports** in Zoho Assist home page.
2. Click **View Report** given besides the respective session.



3. Select **Session Notes** given besides Records on the left side of the screen.
4. Click **DOWNLOAD** to download the Session Note for that particular session.