



# Session Notes

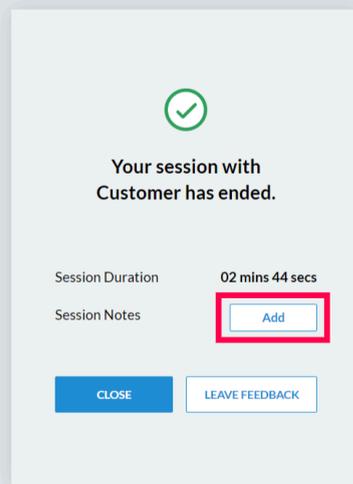
Session Notes enables the technician to store crucial information, case history and comments at the end of every remote support or unattended access session. It can be used by both technicians and Administrator for auditing purposes and future reference. You can edit the notes anytime and download them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

## Feature Highlights

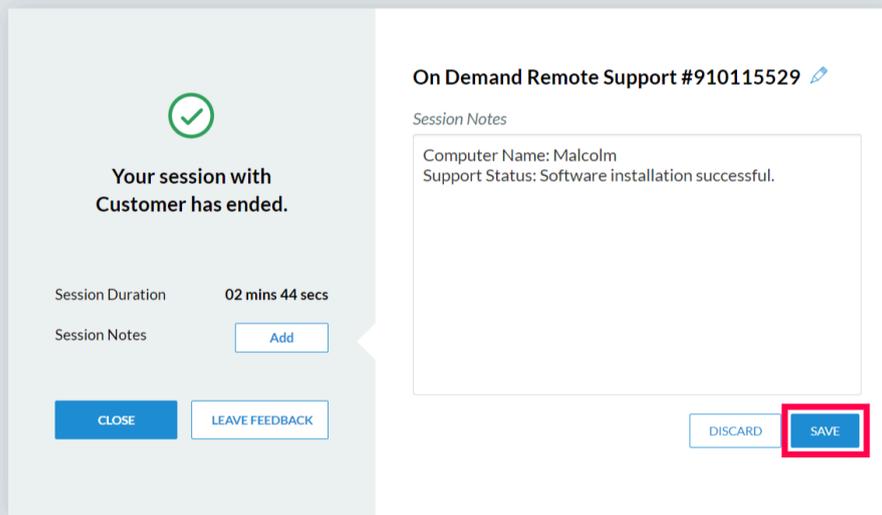
- Create, edit and update the notes whenever you want to.
- View and download the session notes as .csv file.

## 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

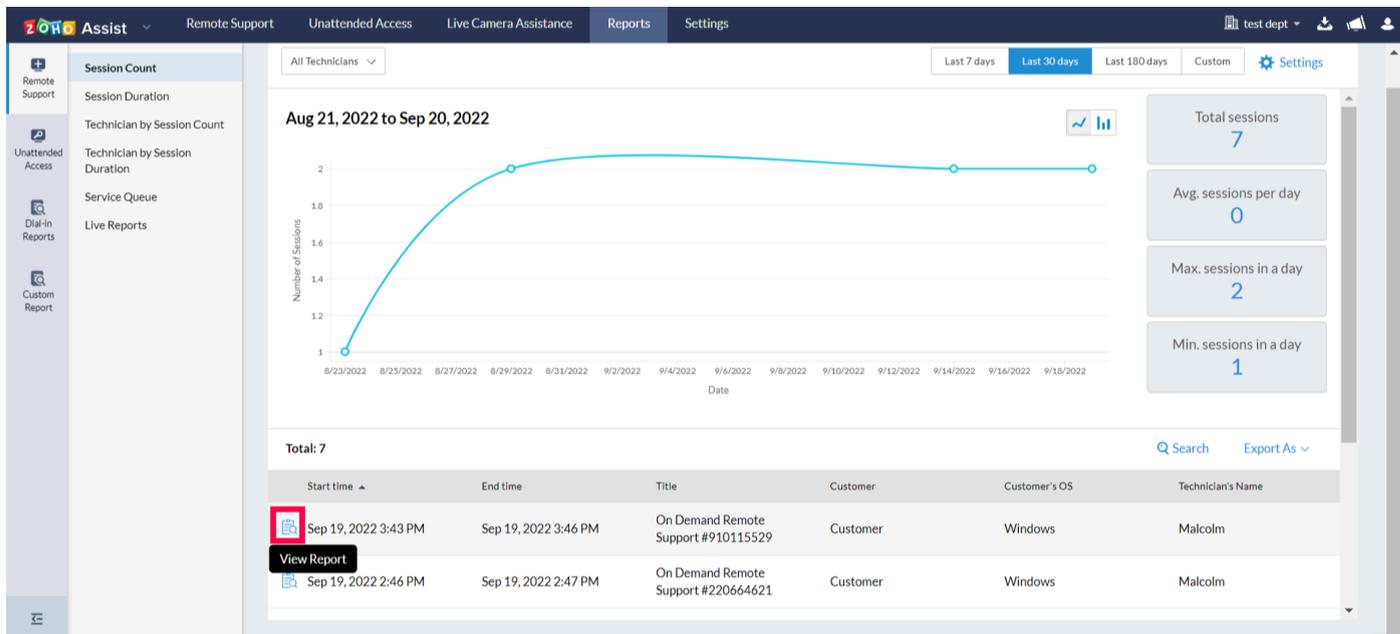
1. Select **Reports** in the top pane of the window
2. Click **Custom Reports** in the left side of the screen.
3. Click **View Notes** given beside the respective session and edit/add the content.

Start time	Title	Resources	Duration	Customer's IP Address	Customer	Customer's OS	Technician's Name
Sep 19, 2022 3:43 PM	On Demand Remote Support #910115529		3 minutes	182.74.243.49	Customer	Windows	Malcolm
Sep 19, 2022 2:46 PM	On Demand Remote Support #220664621		a minute	182.74.243.49	Customer	Windows	Malcolm
Sep 14, 2022 11:21 AM	On Demand Remote Support #848041271		7 minutes	121.244.91.20	Customer	Windows	Malcolm
Sep 14, 2022 11:18 AM	On Demand Remote Support #790666451		a few seconds	121.244.91.20	Customer	Windows	Malcolm
Aug 29, 2022 1:13 PM	On Demand Remote Support #834271268		3 minutes	182.74.243.49	Customer	Windows	Malcolm
Aug 29, 2022 1:09 PM	On Demand Remote Support #248907685		a minute	182.74.243.49	Customer	Windows	Malcolm
Aug 23, 2022 11:18 AM	On Demand Remote Support #903829876		a few seconds	182.74.243.49	Customer	Windows	Malcolm

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.

The screenshot shows the 'Session Audit Report' interface. At the top right, there is an 'Export' button. Below the header, a table lists participant details:

Participant Email	Role	OS	IP Address	Region	Country	Duration
Customer	Customer	Windows	182.74.243.49	TAMIL NADU	INDIA	2m 44s
malcolm@zylker.com	Primary Technician	Windows	182.74.243.49	TAMIL NADU	INDIA	3m 25s

Below the table is the 'Records' section. On the left, there is a sidebar with options: 'Session Notes', 'Session Recording', 'Chat Transcript', and 'Screenshots'. The 'Session Notes' option is selected. The main content area displays the following information:

Session Notes  
 Computer Name: Malcolm  
 Session Status: Software installation successful

At the bottom right of the main content area, there is a 'File Size: 71.00 B' label and a blue 'DOWNLOAD' button, which is highlighted with a red box. Below this, it says 'Updated by You 3 minutes ago' with an 'Edit' button.