Zoho Corporation

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**.

Your session with Customer has ended. Session Duration Session Notes Idd	
Your session with Customer has ended. Session Duration 02 mins 44 secs Session Notes Image: Customer has CLOSE LEAVE FEEDBACK	\bigcirc
Session Duration 02 mins 44 secs Session Notes Add LEAVE FEEDBACK	Your session with Customer has ended.
CLOSE LEAVE FEEDBACK	Session Duration 02 mins 44 secs Session Notes Add
	CLOSE LEAVE FEEDBACK

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

Your session with Customer has ended.	On Demand Remote Support #910115529 🖉 Session Notes Computer Name: Malcolm Support Status: Software installation successful.
Session Duration 02 mins 44 secs Session Notes Add	
CLOSE LEAVE FEEDBACK	DISCARD

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.

ZOHO	Assist	 Remote Support 	Unattended Access	Live Camera Assistance	Reports	Settings			🏥 test dept 👻 📩 📣 💄
et Remote Support	All	ïechnicians ∨ Remote Supp	port 🗸 🛛 All 🗸				Last 7 days	Last 30 days Last 180 days	Custom 🌣 Settings
2 Unattended	Tota	l: 7						Q Sea	arch Export As 🗸 👪
Access		Start time 🔺	Title	Resources	Duration	Customer's IP Address	Customer	Customer's OS	Technician's Name
Dial-in Reports	ß	Sep 19, 2022 3:43 PM	On Demand Remote Support #910115529		3 minutes	182.74.243.49	Customer	Windows	Malcolm
Q	ß	Sep 19, 2022 2:46 PM	On Demand Remote Support #220664621	View Notes	a minute	182.74.243.49	Customer	Windows	Malcolm
Report	ß	Sep 14, 2022 11:21 AM	On Demand Remote Support #848041271	F 🗉 💿	7 minutes	121.244.91.20	Customer	Windows	Malcolm
	ß	Sep 14, 2022 11:18 AM	On Demand Remote Support #790666451	F 🗉 💿	a few seconds	121.244.91.20	Customer	Windows	Malcolm
	ß	Aug 29, 2022 1:13 PM	On Demand Remote Support #834271268	F 🗉 💿	3 minutes	182.74.243.49	Customer	Windows	Malcolm
	ß	Aug 29, 2022 1:09 PM	On Demand Remote Support #248907685	F 🗉 💿	a minute	182.74.243.49	Customer	Windows	Malcolm
	ß	Aug 23, 2022 11:18 AM	On Demand Remote Support #903829876	F 🗉 💿	a few seconds	182.74.243.49	Customer	Windows	Malcolm
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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.

ZOHO	Assist ~ Remote Support	Unattended Access	Live Camera Assistance	Reports	Settings				🏛 t	est dept 👻 📩	<u>ال</u> ، ر	\$
Ð	Session Count	All Technicians 🗸					Last 7 days Last 30 days	Last 180 days	Custom	🗱 Settings		*
Support	Session Duration										*	
Unattended Access	Technician by Session Count Technician by Session Duration Service Queue	Aug 21, 2022 to Sep 20	0, 2022				~0	Lil A	Total ses 7 vg. session	sions s per day	l	l
Dial-in Reports	Live Reports	of Sessions 1.6							0		L	1
Custom Report		1.4 1.2						M	lax. session 2	s in a day	L	1
		1 8/23/2022 8/25/2022 8/	27/2022 8/29/2022 8/31/2022 9	9/2/2022 9/4	4/2022 9/6/2022 9/8/2022 Date	9/10/2022 9/12/2022 9	//14/2022 9/16/2022 9/18/2022	Ν	1in. session 1	s in a day	l	l
		Total: 7						Q S	earch E	Export As \vee		
		Start time 🔺	End time	Tit	le	Customer	Customer's OS		lechnician's Na	ime		
		E Sep 19, 2022 3:43 PM	Sep 19, 2022 3:46 PM	Or Su	n Demand Remote Ipport #910115529	Customer	Windows	I	Malcolm			1
		Sep 19, 2022 2:46 PM	Sep 19, 2022 2:47 PM	Or Su	n Demand Remote Ipport #220664621	Customer	Windows	I	Malcolm			
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- 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.

Sessio	on Audit Report						Export	×
F	Participant Email Customer	Role Customer	OS	IP Address 182.74.243.49	Region TAMIL NADU	Country INDIA	Duration 2m 44s	^
n	malcolm@zylker.com	Primary Technician		182.74.243.49	TAMIL NADU	INDIA	3m 25s	
Red	cords							
	Session Notes Session Notes Computer Name: Malcolm Session Status: Software installation successful							
	Session Recording						File Size :71.00 B	
	Chat Transcript							
	Screenshots	Updated by You 3 minutes ago				Edit		