

SalesIQ Integration

The integration with Zoho SalesIQ allows you to initiate an instant remote assistance session directly from your chat console. During a session, you can guide your customers by viewing their live camera feed and utilizing annotation tools for better assistance. This integration enables seamless customer support without the need for phone calls.

Enabling Zoho Lens for SalesIQ

Follow these steps to integrate Zoho Lens with Zoho SalesIQ:

- 1. Log in to your Zoho SalesIQ account.
- 2. Navigate to **Settings > Integration > Zoho Lens**.

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Company Profile	Global Settings	Telegram	Visitor Routing	Block IP	Answer Bot	Webhooks	
Operators	Email Templates	Instagram	Chat Routing	Do Not Track		Widgets	
Departments	Profanity Library	WhatsApp	Call Routing	Import		Form Controllers	
Usage Statistics	Tags	LINE 📌	Lead Scoring	Roles & Permissions BETA	X	Plugs	
Recycle Bin	TV App	WeChat 📌	Company Scoring				
Conversation Layout 📌			Schedule Report				



3. Click Add and connect with your Zoho Lens account.

 $\leftarrow \quad \text{Settings} \ > \ \text{Integrations} \ > \ \textbf{Zoho Lens}$



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Integrate SalesIQ with Zoho Lens

Key features

- Operators can view the incoming camera stream and provide instructions to resolve issues quickly.
- Lens offers various annotation tools to draw and highlight elements on the visitor's screen for clear instructions and guidance.
- Sessions can be recorded for internal audits, session analysis, and training purposes.

How it works

- Operators can initiate a remote session via Zoho Lens from the SalesIQ operator chat window.
- The visitor accepts the session request to grant mobile camera access.
- Operators can provide assistance by viewing the incoming camera stream and providing instructions to resolve issues.

4. You can view your organization details in the integration window.

← Settings > Integrations > Zoho Lens > Connect with your Zoho Lens account

CONNECT WITH YOUR ZOHO LENS ACCOUNT Zoho Lens integrated account Malcolm (malcolm.d@zylker.com)

Zoho Lens org ID 12345678

- 5. You can also add technicians based on your Zoho Lens subscription.
 - ✓ Settings > Integrations > Zoho Lens = Zoho Lens

6. Navigate to **Settings > Personalize > Global Settings > Operator Interface** and enable the **Remote Access** toggle to allow technicians to request remote access session. ← Settings > Global Settings > Operator Interface ▼ ③

Choose the chat channel for internal communication Pick your preferred chat platform to communicate with your team. Please reload the page after specifying an option for the changes to reflect. • Zoho Cliq SalesIQ - Internal Chat	
Remote access powered by Zoho Lens After integrating with Zoho Lens, enable this option to allow operators to send remote session requests to visitors for swift support.	
Preview visitor message Enabling this feature lets you view visitor messages as they're being typed in real-time, allowing you to stay ahead of the query and have more time to answer.	
Profile enrichment powered by Zia Add more information about the visitor's company in the operator chat window, as well as in company and contact modules.	
Al tools for operators Enhance your operators' productivity by incorporating artificial intelligence into your customer service and	

Note:

Only super admins can integrate a Zoho Lens account with Zoho SalesIQ.

Only technicians within the same organization can be granted access to handle remote assistance sessions in SalesIQ.

Once configured, you can enable or disable the integration as needed.

Updating Zoho Lens Org Details

If a Zoho Lens account is linked to multiple organizations, users can update the linked organization in Zoho SalesIQ by navigating to **Integration Settings** and clicking **Change**.

 $\leftarrow \quad \mathsf{Settings} \ > \ \mathsf{Integrations} \ > \ \mathsf{Zoho} \ \mathsf{Lens} \ > \ \mathsf{Connect} \ \mathsf{with} \ \mathsf{your} \ \mathsf{Zoho} \ \mathsf{Lens} \ \mathsf{account}$

CONNECT WITH YOUR ZOHO LENS ACCOUNT Zoho Lens integrated account Malcolm (malcolm.d@zylker.com)

Zoho Lens org ID 12345678 Change

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Initiating a Remote Assistance Session

To start a remote assistance session from Zoho SalesIQ:

- 1. Open **Zoho SalesIQ** and go to **My Chats**.
- 2. Select the visitor's chat for which you want to initiate remote assistance.
- 3. Click the **Remote Assistance** icon at the bottom of the chat window.

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4. Alternatively, click the three-dot menu and select **Start Remote Assistance**.

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- 5. The session invitation will appear in the conversation. Click **Join Now** to initiate the session.
- 6. A new tab will open for the session. Share the **Join ID** with the customer via email or SMS to allow them to join the session.

INVITE YOUR CUSTOMER
Ask your customer to download the <mark>Zoho Lens</mark> app from Play Store or App Store and enter the session ID.
123-456-789
(OR)
Share the below link with your customer
https://lens.zoho.com/join/123456789
Share via Mail Share via SMS
Note: Please assure that you cand out cassion invites after acting your sustament assessed. Use Plainted messaging could be also find as SPAN 1
NVIE: Frease drisure that you send out session invites arter getting your customer is consent. Unsolicited messaging could be classified as SFAM, Learn more.