What is this course about?

2-minute lesson

Okdesk is a powerful automation system that covers many aspects of service and technical support activities. But trying to automate everything in one go is not the best idea. Therefore, we suggest ‘to eat the elephant one bite at a time’, i.e. to implement Okdesk on a stage-by-stage basis.

Introduction of new tools requires changes to the company’s business processes. It is one thing when operating procedures are changing gradually, step by step. But transition to a new life in one day is another story. We are supporters of smooth transition :)

The objective of this course is to take the first step towards a new life with Okdesk. After completing the course, you will be able to benefit from implementing Okdesk on the very first day. You will learn how to create clients and contacts, to build a support structure, to set up email notifications of new tickets, and to connect email accounts to Okdesk for automatic ticket creation.

Upon completion of this course, you will start recording and tracking in Okdesk all client tickets received by email or phone. This will allow you to prevent loss of client tickets, and to store all correspondence with the client in a single place. You will take the first, and confident, step to a new level of service.

Implementing the Okdesk functions discussed in this course will allow you receive regularly the following information:

- How many tickets have been received today? How many of those are being processed? How many have been resolved? Which client tickets have been left without reply?
- What are the agents up to? Who is resolving which tickets? Who is the fastest in resolving tickets and who is behind?
- Which client most often sends tickets to the support? Which client creates the biggest load, and does this load correspond to the amount of money the client pays for the services?

This course covers only a small part of Okdesk features. But even this small part will enable your company to achieve a new level of client service.

Let’s go!

Lesson 2 of 7

New Ticket Registration

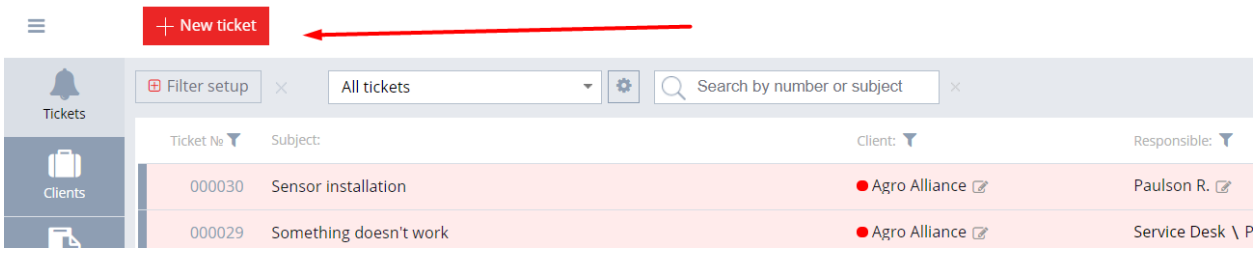
4-minute lesson

Service companies work with client tickets: incidents, maintenance requests and consultations. This creates a need to register client tickets in some way to prevent their loss and ensure that they are resolved within the allocated time.

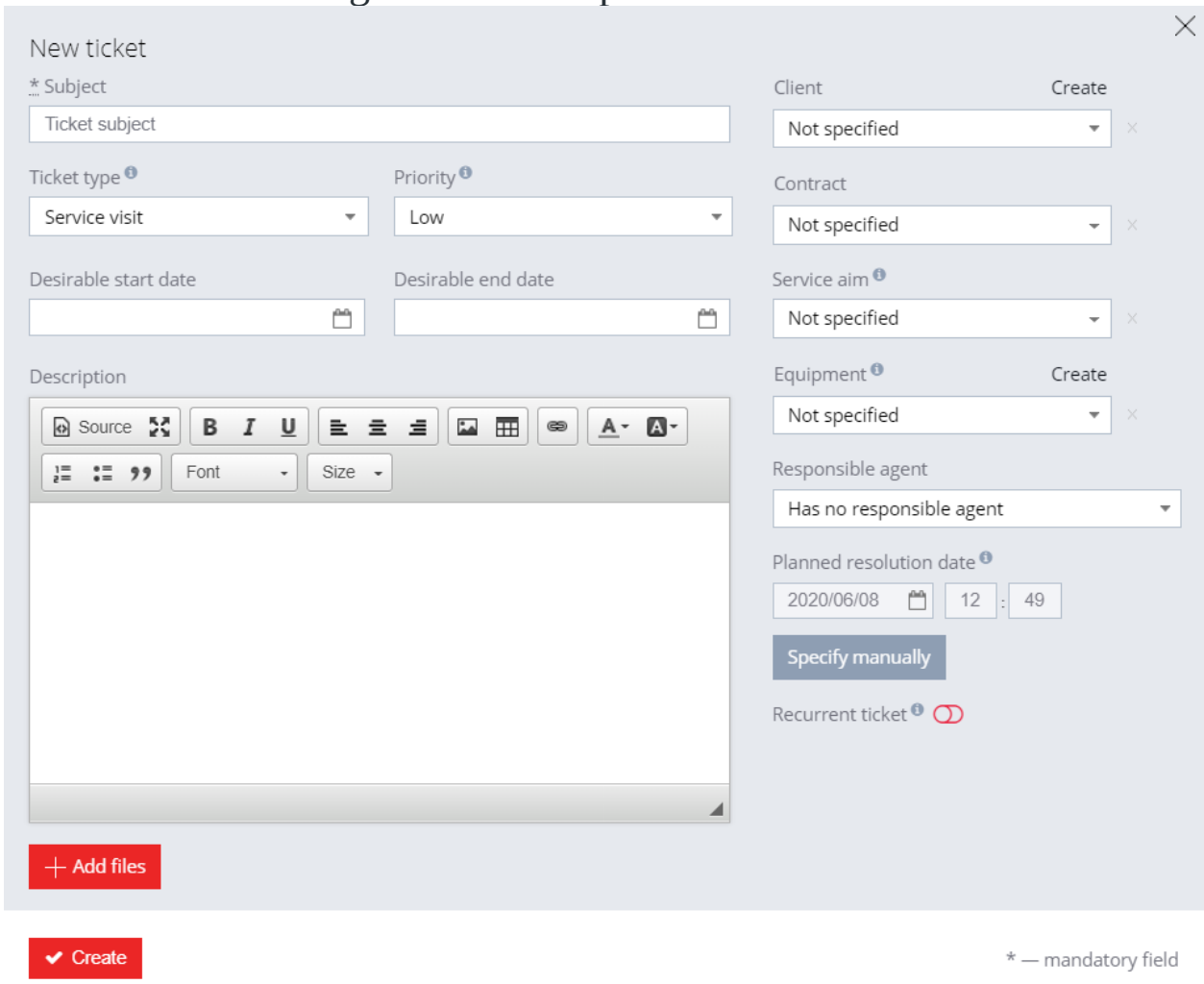
This is exactly why the client ticket is the main item in Okdesk. Tickets are registered in Okdesk on all client calls. As different clients prefer different ways to contact the support, for their convenience tickets can be registered in Okdesk via a wide range of channels: telephone call to an operator, email, Telegram bot, web form on the website, client portal, and others.

In this lesson, we will discuss the easiest way to register tickets, which is registration from the system interface by an operator or an agent.

So, a client made a phone call. To record the call, create a new ticket in Okdesk. To do this, click on the ‘+ New ticket’ button.



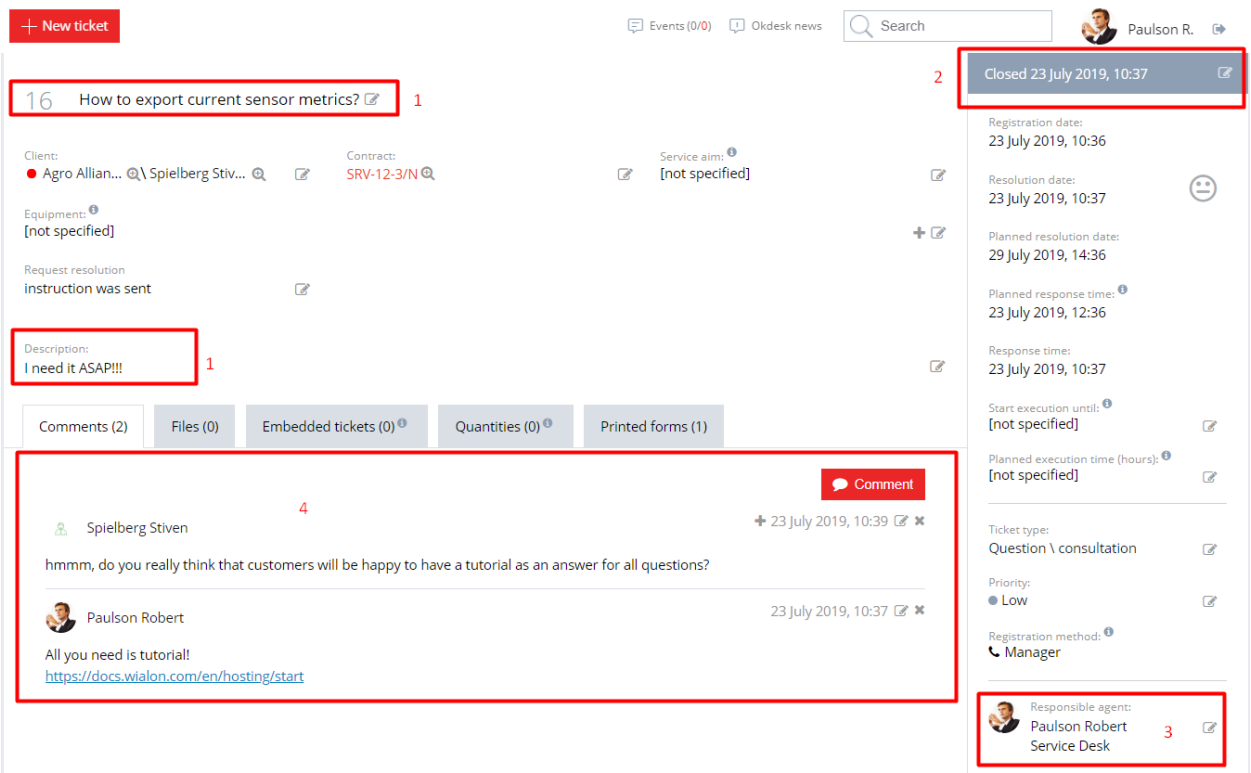
The form for creating tickets will open:



To create a ticket you need only to fill in the ‘Subject’ box, which is used for short description of the issue.

However, where necessary, you can also enter any additional information, including link to the client, contract, service aim, and equipment — we will look at these parameters in more detail later.

Clicking the ‘Create’ button will take you to the created ticket card where its parameters are displayed. The following screenshot lists the main parameters of the ticket. Let us look at them in more detail:



Block 1 — subject and description. The subject field contains a brief summary of the ticket, while more detailed information about the nature of the client's call can be added to the description field.

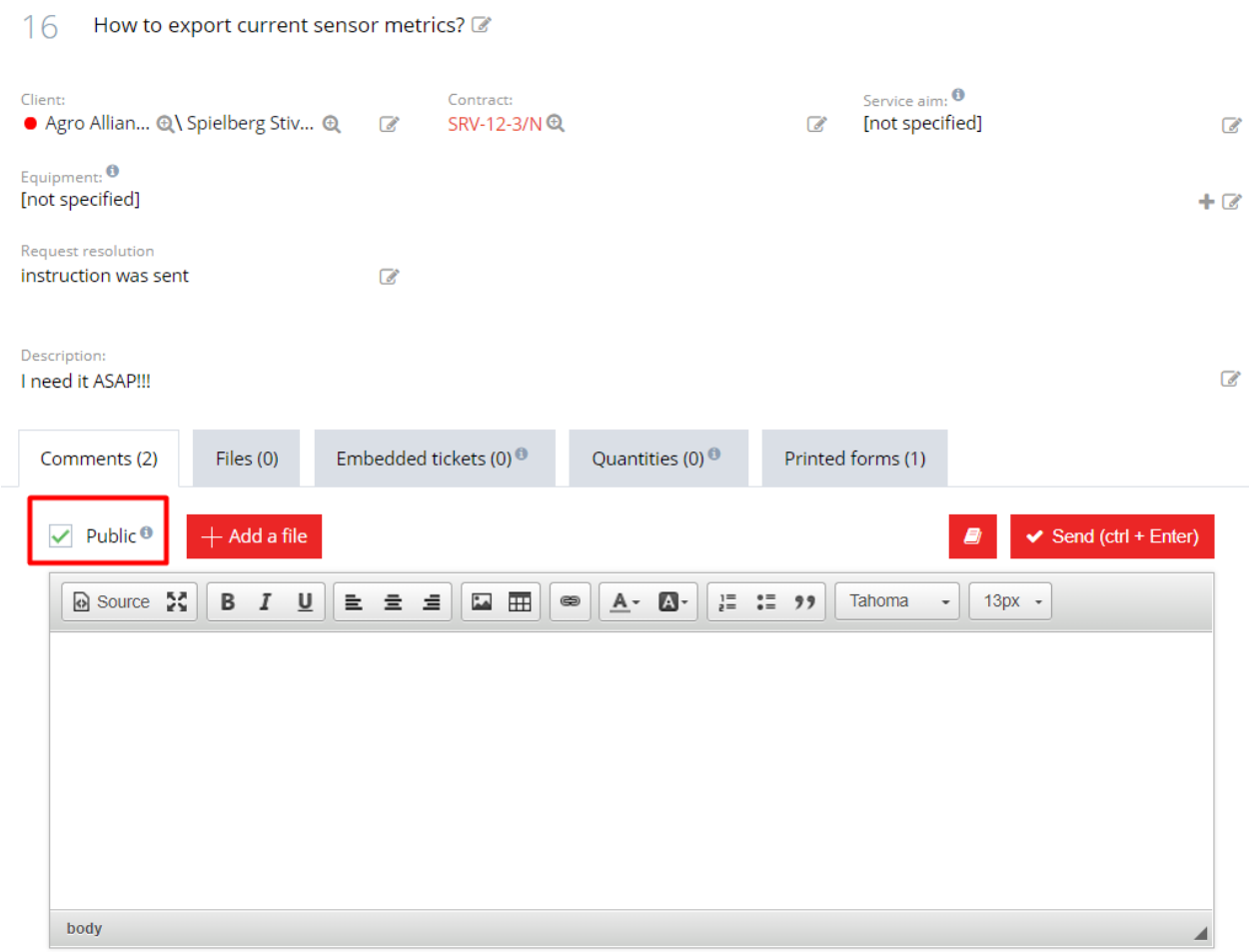
Block 2 — status. The status shows the stage of resolution at which the ticket is at the time. The standard resolution process consists of the status sequence 'Opened-Resolved-Closed'. If for some reason you need to postpone the ticket resolution (for example, at the client's request or in a situation where resolution requires certain components that are not currently available), you can move the ticket to the 'Delayed' status, specifying the date to which the resolution is postponed. On the specified date, the system will automatically move the ticket from the 'Delayed' status to the previous status.

If your business process involves a different sequence of steps for resolving client tickets,you can configure the set that you need. These features will be discussed later in other courses.

Block 3 — responsible agent or group. A responsible person is a service agent responsible for ticket resolution, i.e. for executing the ticket. It can be either a single agent or a group or team of agents.

Block 4 — comments. In the resolution process, the service agents can leave ticket comments. The agent's reply to the client ticket is sent to the client by email. The client can reply to the notification email, and their reply will automatically be 'attached' to the ticket. This way, you can have a dialogue with the client: ask them clarifying questions, explain the sequence of actions for resolving the issue on their end, inform about progress in solving the client's issue, and more.

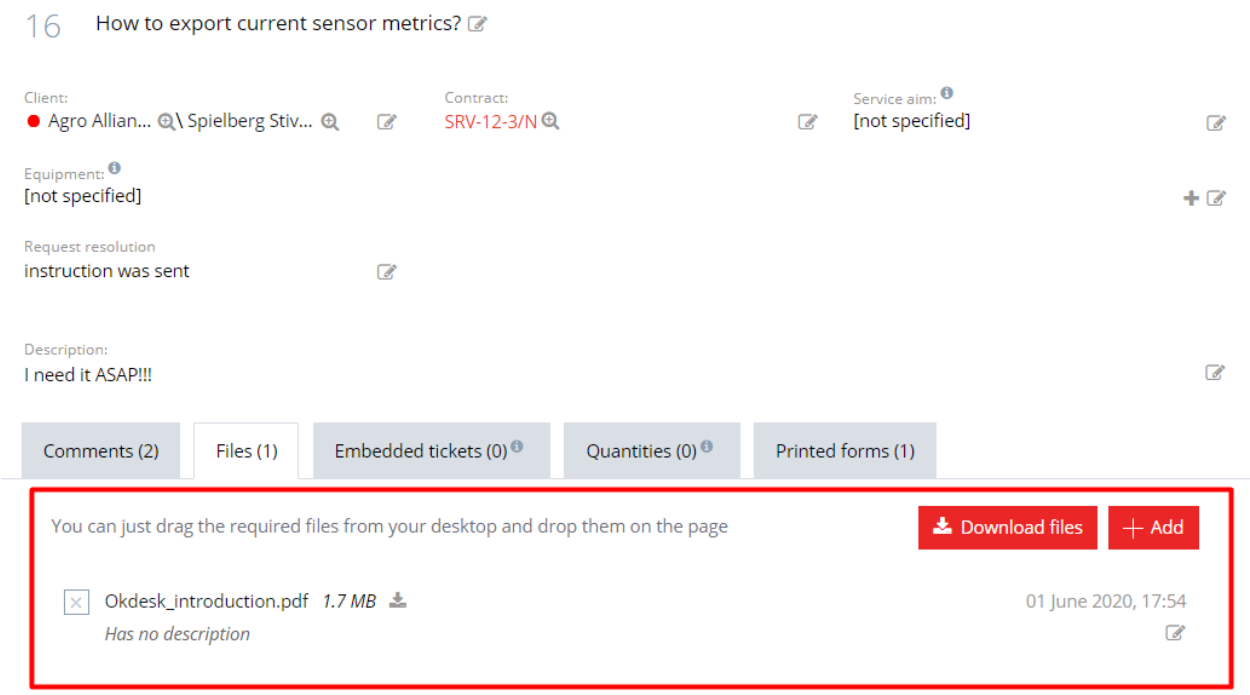
Agents' comments can be public or private. Private comments can only be seen by the company's agents and not by the client:



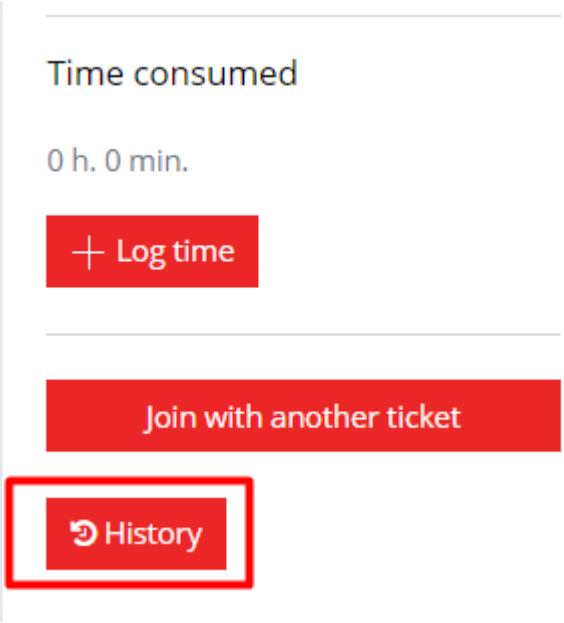
By the way, you can configure 'timeouts' for adding comments. If you enable the 'timeout' option, comments will be published only after expiration of the 'timeout' period. And before the comment has been published, the comment's author can remove it from publication if they see an error. You can set timeout at Settings \ General system settings page in parameter 'Add comment timeout (min)'.

You can attach files to a ticket card. For example, the client can attach a screenshot of the error so that you can diagnose the problem faster and more accurately.

You can attach files using the ‘Add’ button. Or you can just drag the file from its location to the required page. Where necessary, you can add descriptions to the files. Same as comments, files can be public or private (only available to company agents). Clients can only access public files.



All ticket events are logged in the event history. To view the event history, you need to click on the ‘History’ button on the ticket card:



The event log displays information about the main actions taken on the ticket during its lifecycle: creation, status change, change of the responsible agent or team, adding and deleting files, subject change, etc. In the case of conflict situations, it is the history of events that will help you figure out who is right and who is wrong.

In this lesson, we discussed the basic actions taken on the tickets: creation, status change, commenting, assignment to a responsible agent or team, and adding files. As mentioned earlier, tickets are linked with clients. In the next lesson, we will talk about the client directory in Okdesk.

Lesson 3 of 7

Fill the client base

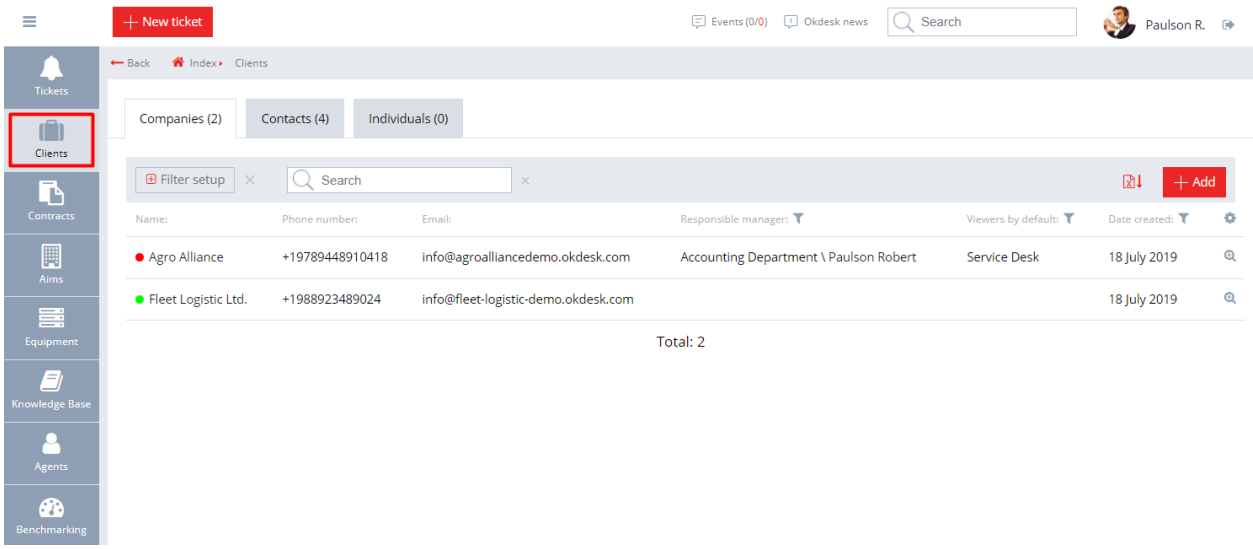
3-minute lesson

In the previous lesson, we discussed the basic capabilities relating to processing client tickets. We would like to remind you that the ticket is the main item in Okdesk. The ticket reflects the core of the client's problem, and it is the ticket that the service agents work with.

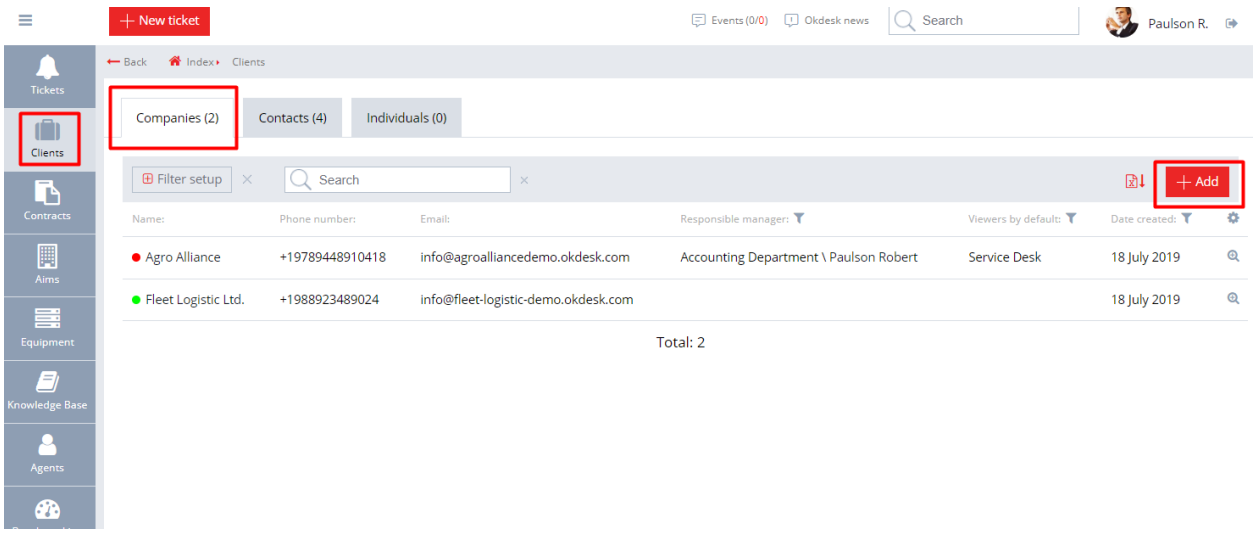
As tickets are received from clients, it is important to link tickets to clients. For this, Okdesk features a module for registering the client base (CRM) that allows to store information about client companies, their contacts and contracts.

In this lesson, we will discuss the basic features of the CRM module: creation of a client company profile and creation of client contact profile.

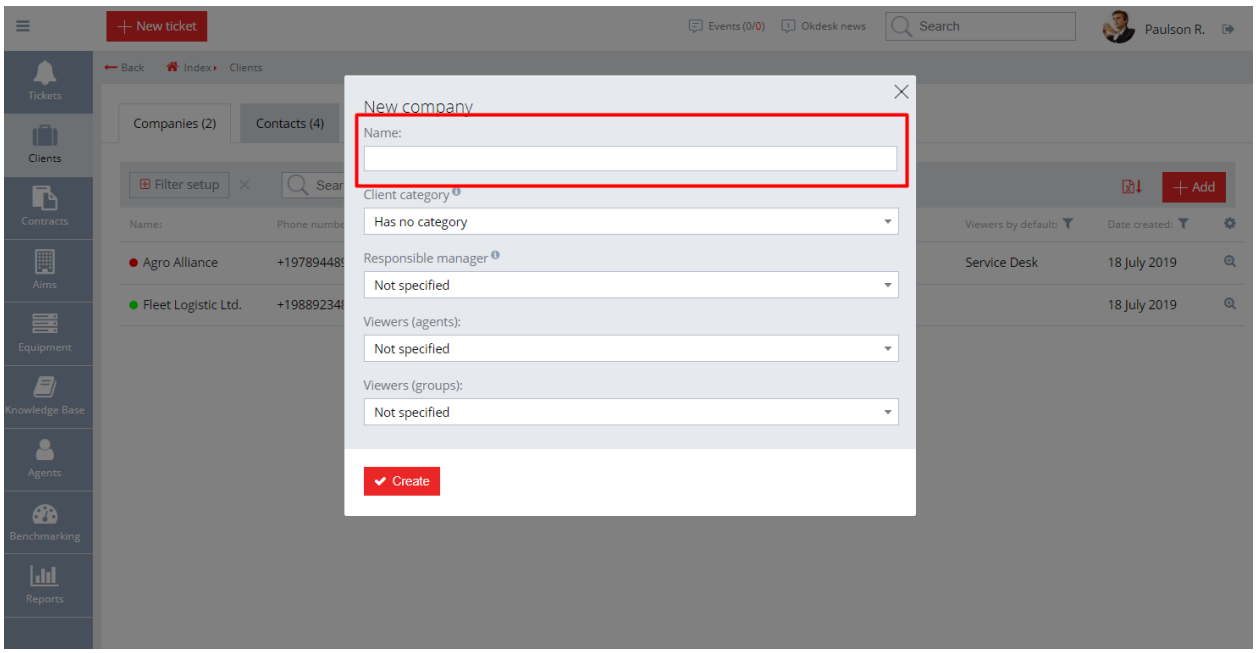
Let us start with client company profile. So, your company provides technical support and maintenance services to legal entities. A list of all client companies is displayed in the ‘Clients’ section:



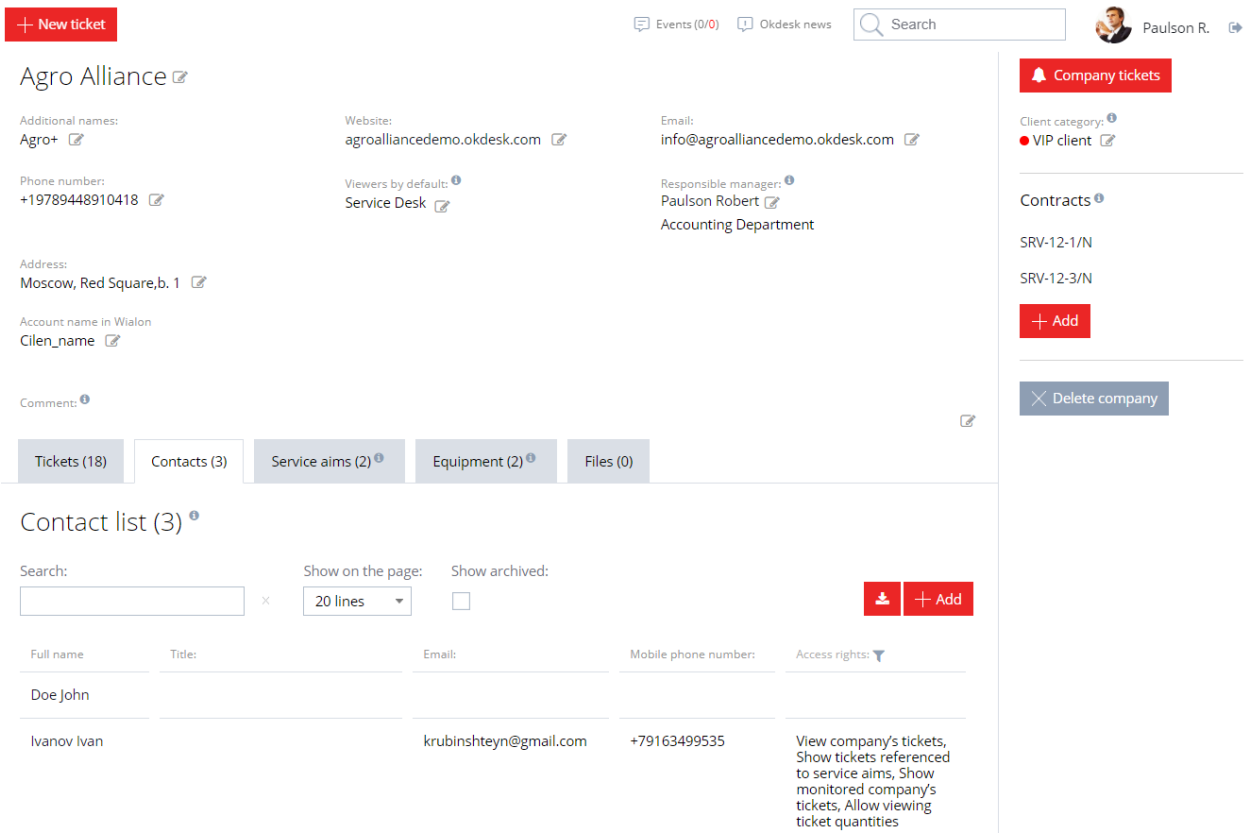
To add a new company to the directory, click on the ‘+ Add’ button in the list of clients:



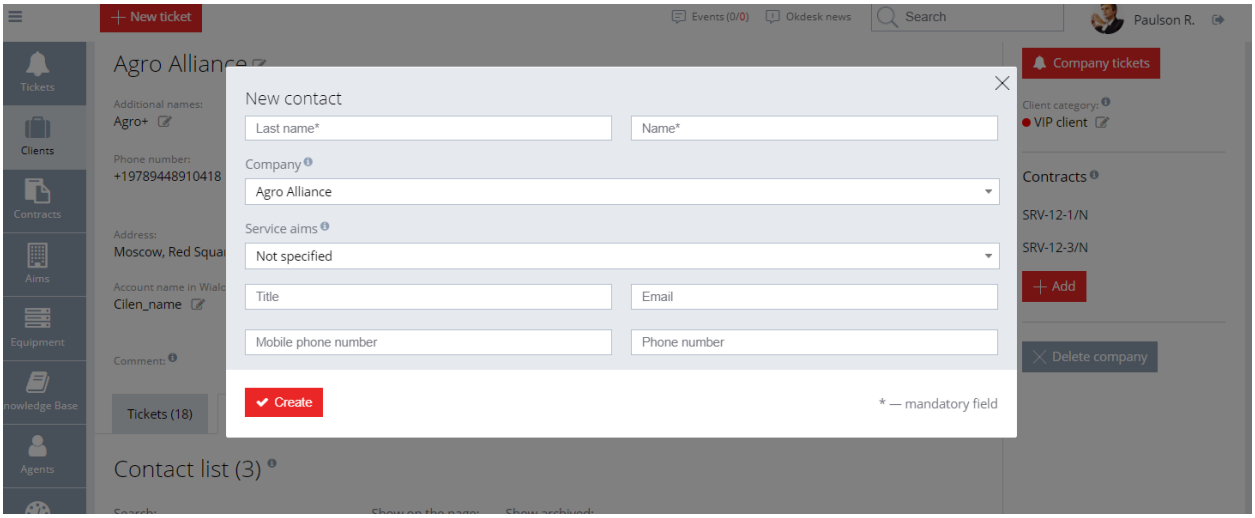
The form for adding a new client will open. When creating a client, the only mandatory field is ‘Name’ (the purpose of other parameters will not be discussed in this lesson):



After adding a new client company, a client profile will open, which displays contact information, lists of contracts, contacts, and service aims (restaurants, cafes, points of sale, distributed offices, etc.), as well as a list of the client's equipment. In this lesson, we will discuss only the list of contacts, i.e. the client's employees who contact your company for services.

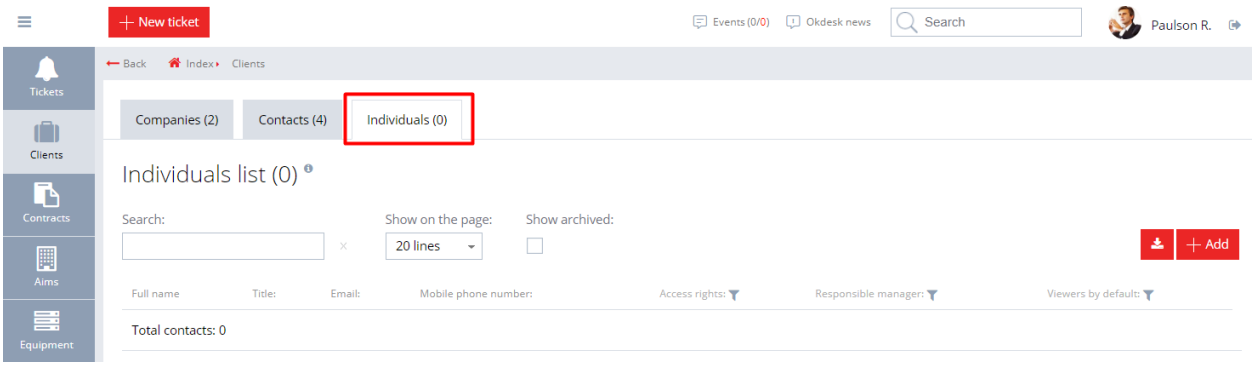


To add a contact, click on the '+ Add' button. In the form that opens, enter the first and last name of the contact, and, where necessary, their contact information:



After clicking the 'Create' button, a new client contact profile will be added.

By the way, if your company provides services not only to legal entities, but also to individuals, Okdesk has a directory of individual clients. The list of individuals is located in the 'Clients' section on the 'Individuals' tab:



You can create a new individual by clicking the '+ Add' button in the list of individuals. An individual has the same parameters as the contact, except that the 'Company' field for an individual has an empty value.

So, in this lesson we discussed the directories of client companies and contacts and learned how to add new company and contact profiles to the directory. In addition, we made a passing mention that Okdesk

allows you to keep records of client locations (service aims) and serviced equipment — but we will talk about this in other courses.

The next step that will bring you closer to getting started with Okdesk is adding accounts of the agents who will process tickets. We will talk about this in the next lesson.

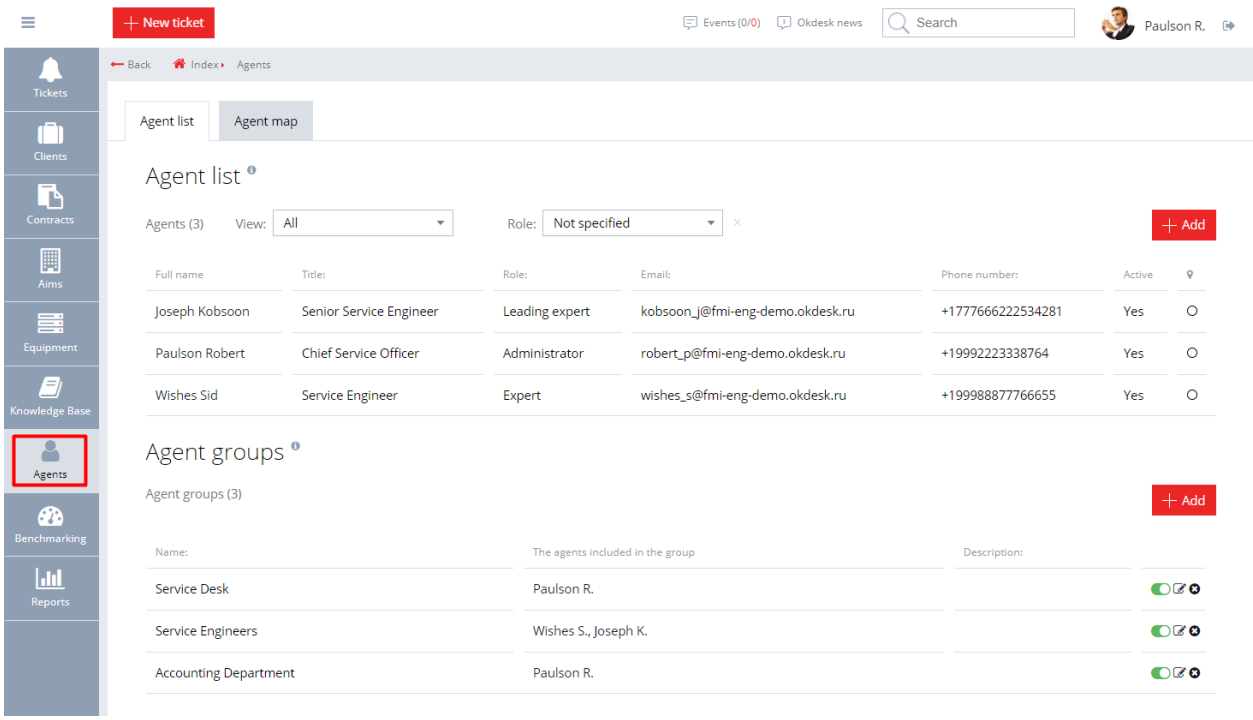
Lesson 4 of 7

Engage Agents

4-minute lesson

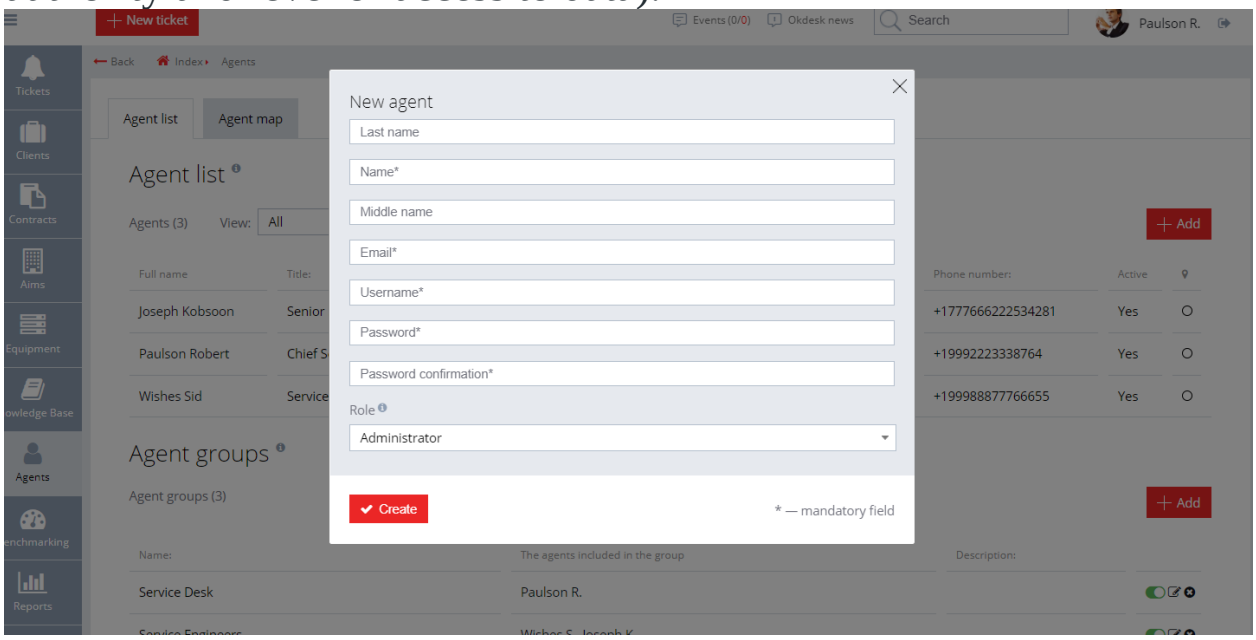
In the previous lessons we familiarized ourselves with the basic features of the CRM module (client and contact base) and learned how to create new tickets. Now, to process tickets in Okdesk, you need to create agent accounts in the system — those of the agents who will work with client tickets.

The list of agents of the service department is displayed in the ‘Agents’ section:



To add a new agent account, click on the ‘+ Add’ button. It will open the form for creating a new agent. The mandatory fields in the form are Last Name, First Name, Email, Username and Password (notifications will be sent to the specified Email address for events

relating to the assigned tickets, and the specified Username and Password will be used by the agent to log in). In this form you can also specify the agent's role in Okdesk (the role will determine their authority and level of access to data).



Once a new agent account is created, Okdesk will offer to activate the agent (the agent will not be able to log in until activated, but at the same time they will not occupy a license).

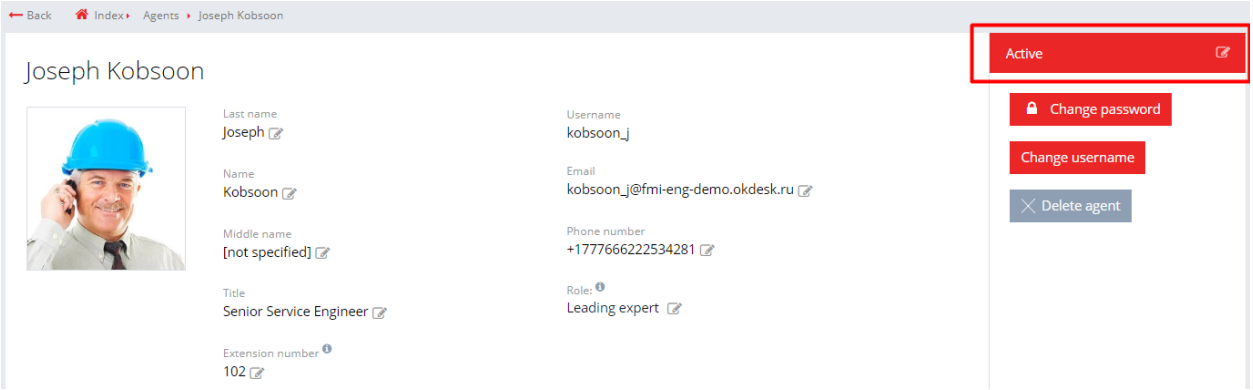
Let us say a few words about the roles. There are only 3 of those:

- Administrator — has access to all functions of the system;
- Leading expert — has the same rights as the Administrator except for the settings section and can optionally have access to the 'Reports' section. Furthermore, 'Leading expert' cannot create new agents, change their username and password, and cannot change the planned deadline for resolving tickets at their own discretion;
- Expert — the 'lowest' role in Okdesk. Experts can only see the tickets that are assigned to them or to the team they belong to. Experts can also see tickets in which they are the author, an observer, or tagged in comments.

Once the agent account is created, you can add a photo to it. It is important to note that Okdesk has two agent statuses: active and inactive. The conversion of an agent's account from one status to the

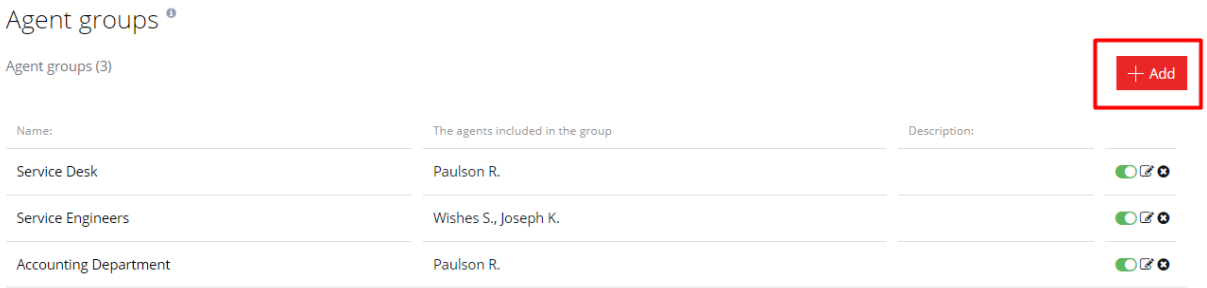
other can be done by Administrators. What is the purpose of agent statuses?

Active agents can work in the system using all of its functions and, accordingly, they occupy a license. Inactive agents cannot log in to Okdesk and cannot be appointed responsible for tickets. At the same time, inactive agents do not occupy a license. The mechanism for activating/deactivating agents is needed in a situation where agents leave the company — in this case, they can be deactivated (the entire work history will be saved, but the license that the agent occupies will be vacated):



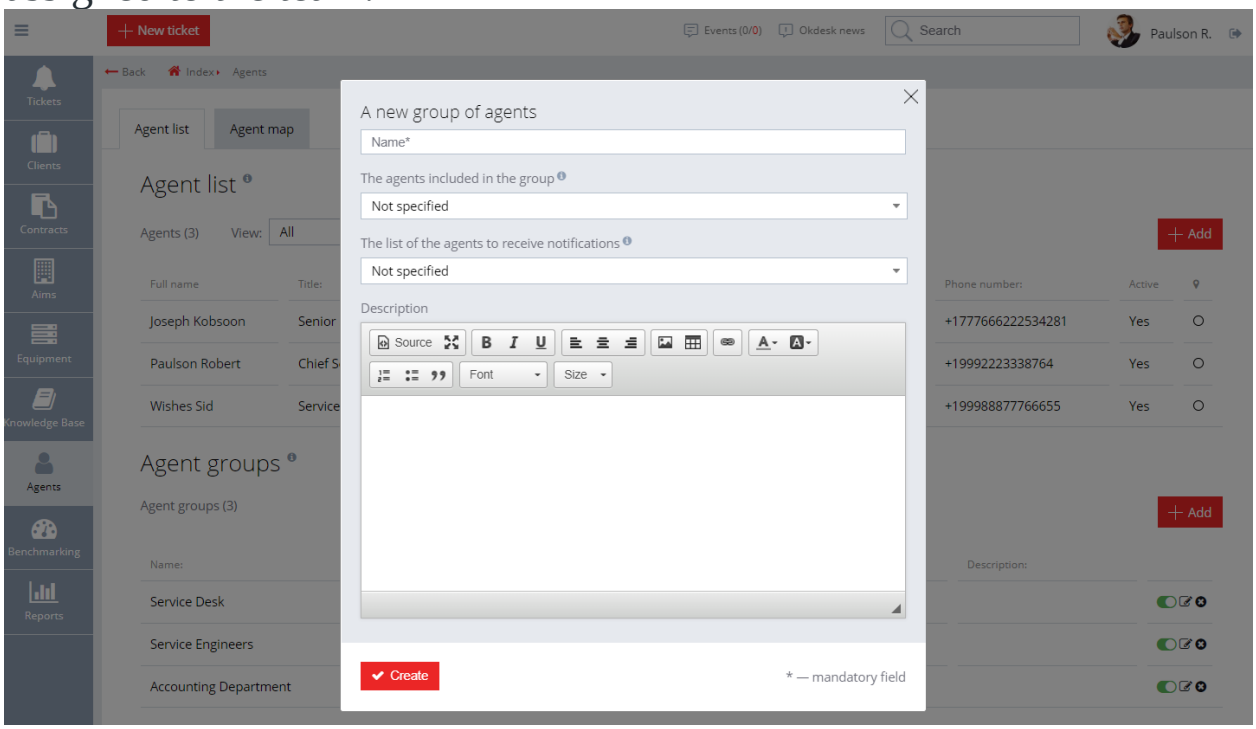
As the service department expands, agents stop being ‘multitaskers’. They start having specialization: some administer the server farm, others do field work or act as a operator. This is why large service departments need to combine agents into functional teams — and we have implemented this feature in Okdesk. The list of functional teams is below the list of agents.

To add a new team, click on the ‘+ Add’ button in the list:



Clicking on this button opens a window for adding a new team. The only mandatory parameter in this form is ‘Name’. In addition, in the form for creating a team you must list agents included in the team (by

the way, one agent can belong to several groups) and specify which of the team agents will receive notifications when new tickets are assigned to the team:



Agents can be organized in teams not only by function, but also by geography. For example, if your company has branches in different cities, you can create separate teams of specialists for each branch.

In the previous lessons we have learned the minimum set of functions required to process client tickets. However, we have considered only one of the ways to receive tickets in the system: when a service department agent manually creates a ticket (this is by far not the only way). Another important way to register tickets is to create them automatically based on client emails. We will talk about this in the next lesson.

Lesson 5 of 7

Configure Client Emails check

3-minute lesson

It is often more convenient for clients to contact the support via email. They send emails with requests, complaints and inquiries to a single support email address and expect a reply containing answers and

recommendations. However, if agents reply to clients directly from email programs, serious problems will arise.

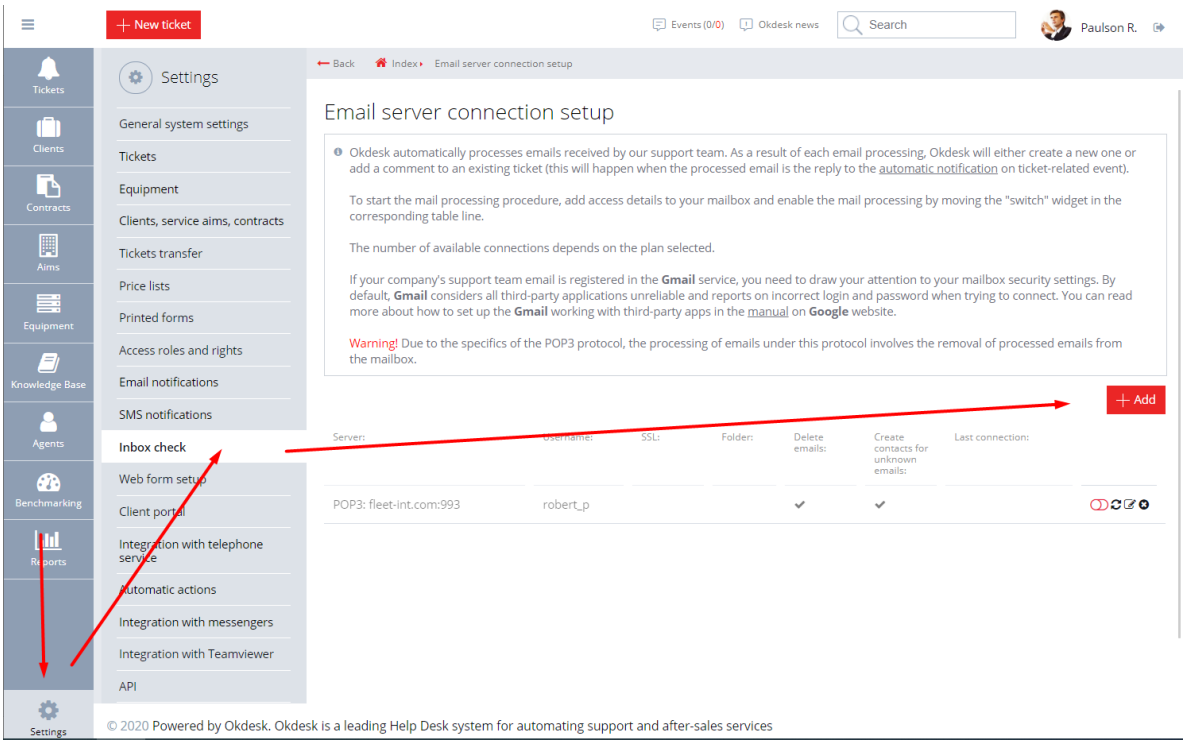
First, it is easy to get mixed up in the email chain and lose the client's request. Plus, lost and unanswered tickets reduce the loyalty level (affecting the client's decision to renew the service contract).

Second, an email program does not accumulate statistics or perform analysis on client emails (so you have no information on who wrote most often, on what problem, etc.).

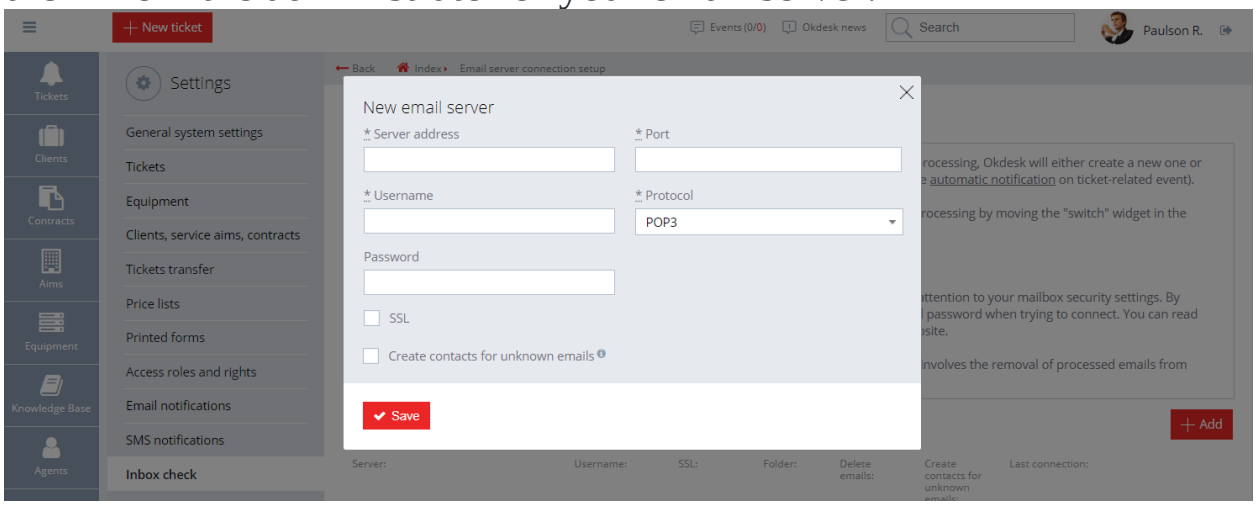
And third, if the correspondence is done via email programs, it is not easy to review the history of communication with the client — and in the case of any problems, it will be impossible to figure out who was right and who was wrong.

This is why Okdesk features an email processing module that automatically registers tickets for incoming emails. This allows clients to communicate with the support using their usual email program, and support agents to work with tickets through the Okdesk interface. This solves all of the above problems.

To connect an email account to Okdesk, go to the 'Settings/Inbox check' section and click on the '+ Add' button:

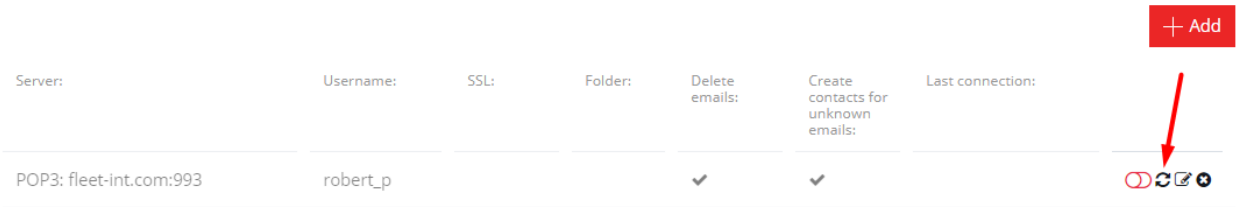


The form for creating a new connection to an email account will open. In the form for creating a new connection, specify the details for accessing the email account. If you do not know the details, request them from the administrator of your email server.



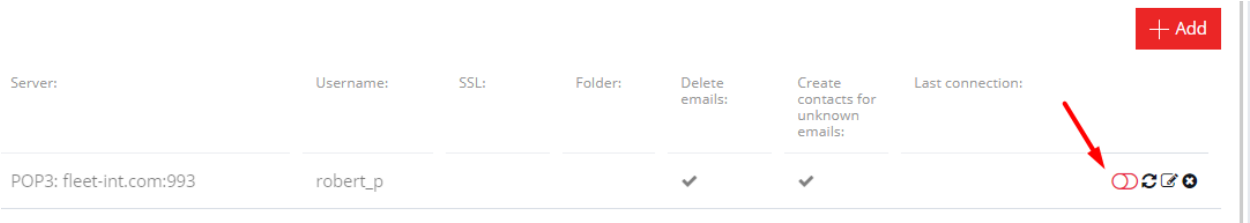
The form also contains the ‘Create contacts for unknown emails’ parameter. You may enable it if you want new contacts to be created when you receive an email from an unknown sender. Otherwise, if the ticket comes from an unknown email address, it will be created without a link to the company and contact.

Once you add a new connection, check if Okdesk is able to receive emails using the relevant details:



The results will be displayed on the screen. This way you can check whether the connection data has been entered accurately and whether the connection to the email server is correct.

After checking the connection, don’t forget to enable email processing by switching the enable/disable widget in the corresponding row of the table:



You can connect one or more email accounts depending on your pricing plan.

Done! You have configured incoming mail processing. Now when a client sends an email, Okdesk will automatically create a ticket that agents can handle. When agents reply to tickets in the Okdesk interface, the reply text will be emailed to clients. And when the client replies to the received email, their message will be displayed in Okdesk as a comment to the ticket.

In this lesson we discussed the incoming email processing for automatic creation of tickers in Okdesk. In the next lesson, we will consider email notifications to agents and clients.

Lesson 6 of 7

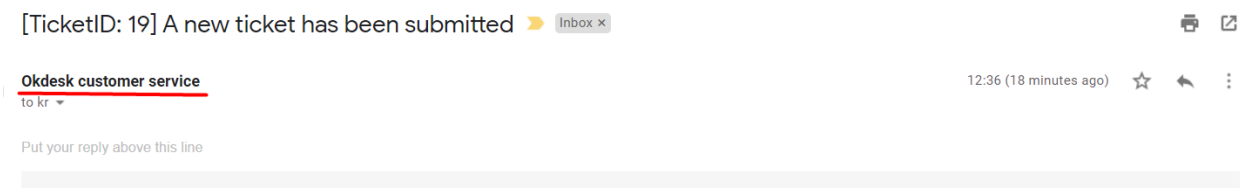
Configuring Ticket Notifications

2-minute lesson

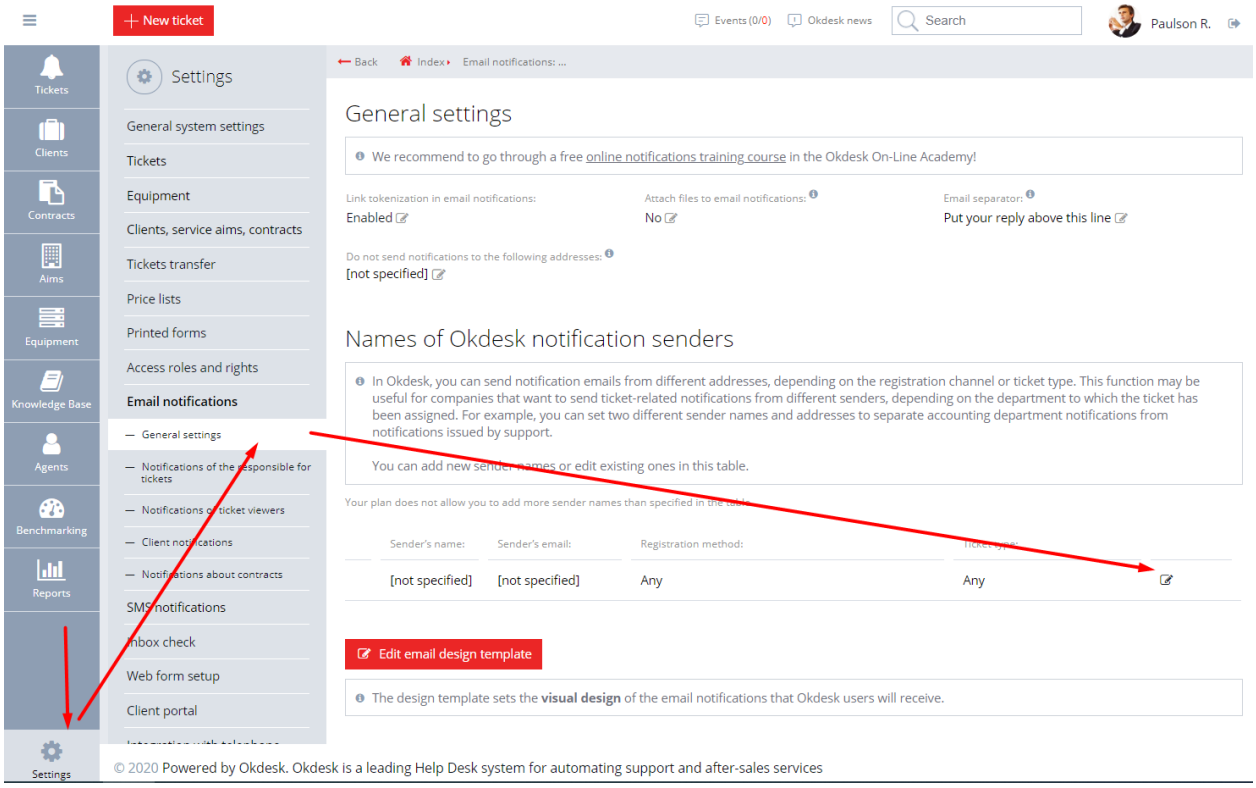
In the previous lessons, we discussed the basic actions taken on the tickets. To ensure that responsible agents and clients are always aware of what is happening, Okdesk has a module for sending email notifications, for example, when a ticket is created, a comment is added, a status is changed, or any other actions taken. Email notifications are sent to the email addresses specified by the agent and the client.

In this lesson, we will not go into detail about configuring the content and appearance of email notifications, but will discuss only the following two aspects: how to set sender’s email address and sender’s name. You need to set the sender’s name to make sure clients

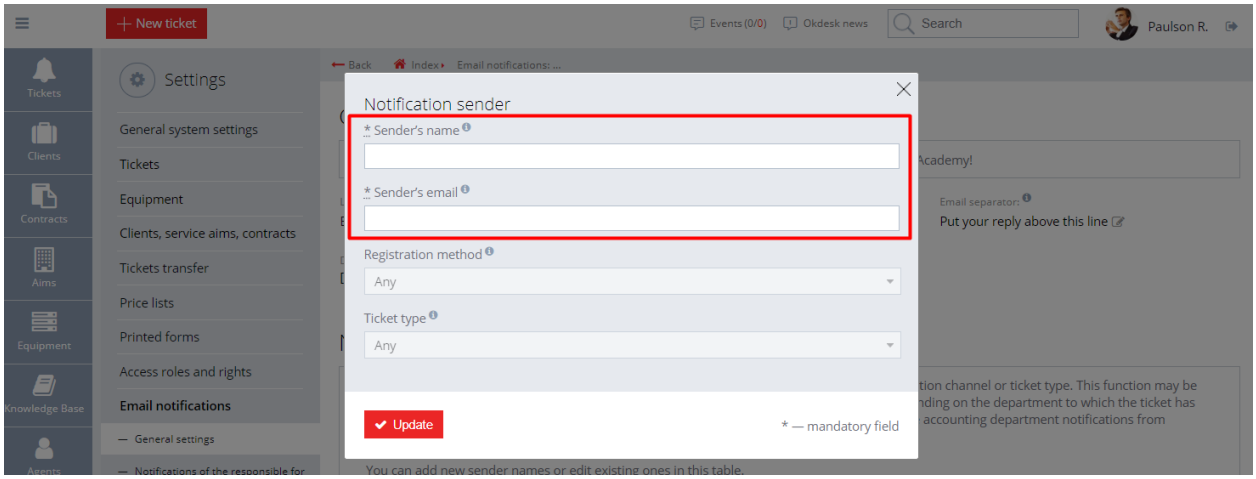
understand that they get these emails from your company's support service:



To set the sender's email address and name, open 'Settings\Email notifications\Okdesk notification sender name' and click on the edit icon in the row:



Use this screen to specify the sender's name and email address that will appear on ticket event notifications:



In this lesson we looked at the mechanism for email notifications sent to agents and clients. In the next one, we will discuss a mechanism for automatic assigning tickets to responsible agents.

Lesson 7 of 7

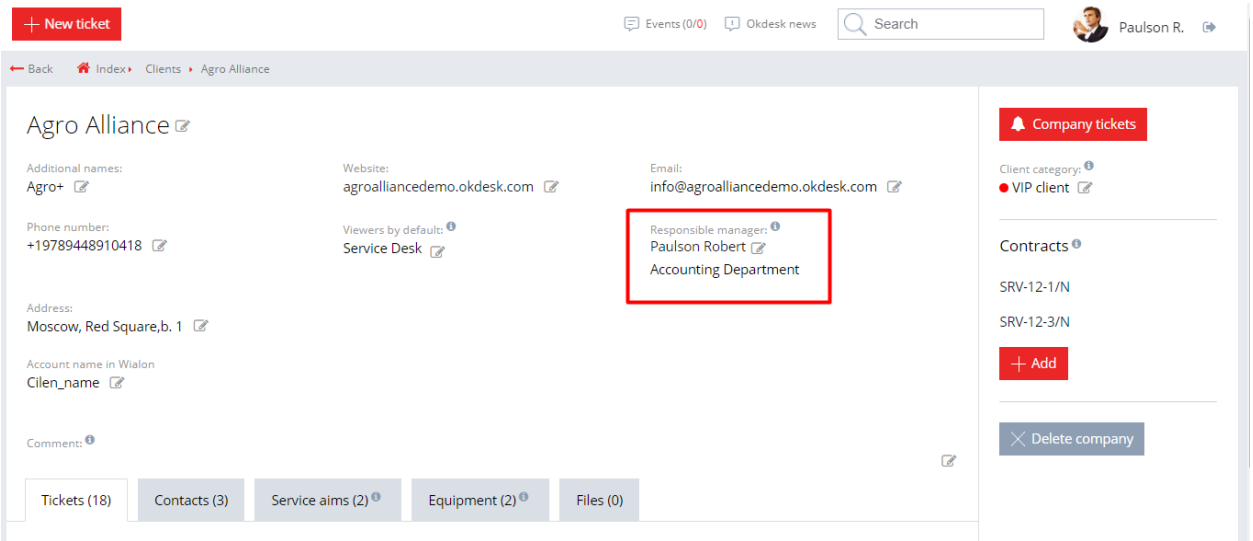
Automatic Assignment of Tickets to Responsible Agents (Routing)

2-minute lesson

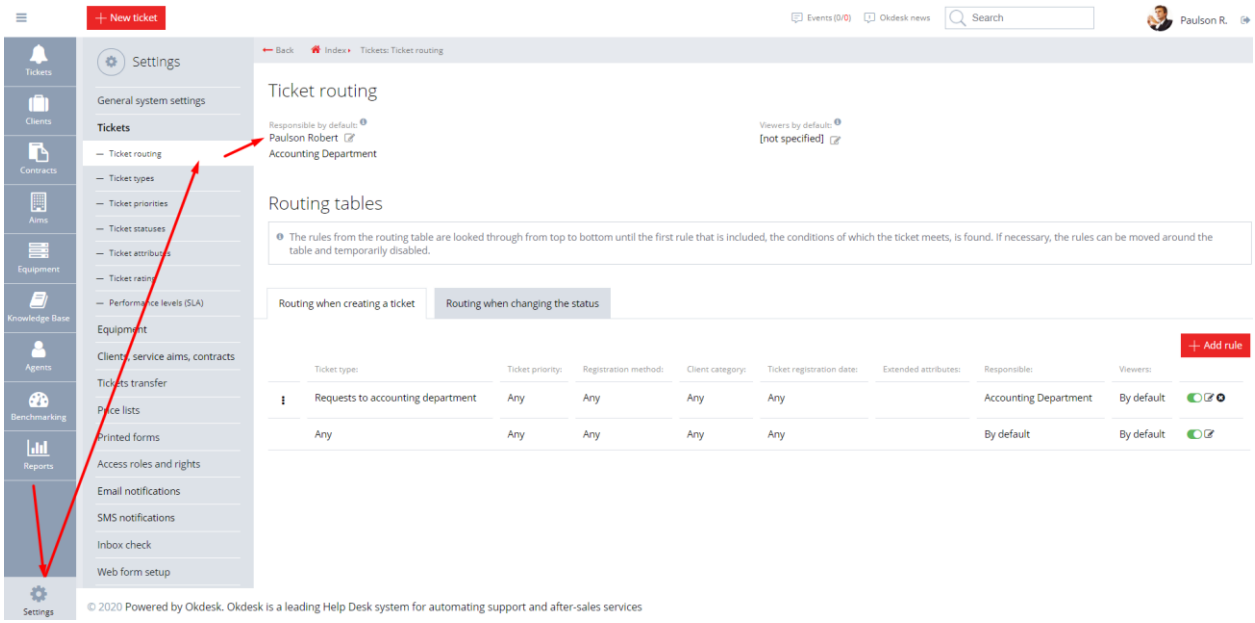
When a new ticket is received from a client, it is necessary to determine who will be responsible for its resolution. There are two options: you can engage an operator who will assign tickets manually, or you can configure automatic assignment of tickets.

Okdesk has a powerful tool for automatic routing of tickets. In this course, we will not discuss all the features of this tool in detail, but will focus on its basic aspects: routing by client and routing by default.

The company profile has the ‘Responsible manager’ parameter. You can specify an agent or a team of agents that will be responsible for tickets received from this company:



In addition, you can specify an agent (or a team) who will be responsible for all tickets by default. This parameter can be configured in ‘Settings/Tickets/Ticket routing’:



Thus, when creating a new ticket, the following logic is implemented: if the ticket is linked to the company and the company profile specifies the responsible agent, this agent (or a team) will be responsible for the ticket. If not, the responsible user will be appointed from the ‘Responsible by default’ parameter on the ticket routing settings page. If the agent responsible by default is not specified, the ticket will be created without a responsible agent.

In the previous lessons, we discussed the basic actions for processing tickets in Okdesk. The next lesson focuses on the features of the most popular tool in Okdesk: the ticket list.