

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

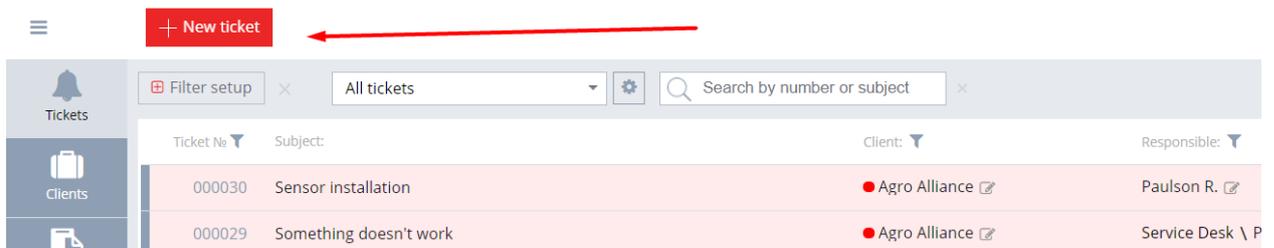
4-minute lesson

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:

New ticket

* Subject
Ticket subject

Ticket type: Service visit | Priority: Low

Desirable start date: | Desirable end date: |

Description: [Rich text editor]

Client: Not specified | Contract: Not specified | Service aim: Not specified | Equipment: Not specified | Responsible agent: Has no responsible agent | Planned resolution date: 2020/06/08 12:49 | Recurrent ticket: [Off]

+ Add files

✓ Create

* — mandatory field

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:

The screenshot displays a ticket management interface. At the top left, there is a '+ New ticket' button. The main header shows 'Events (0/0)', 'Okdesk news', a search bar, and the user profile 'Paulson R.'. The ticket title is '16 How to export current sensor metrics?' with a '1' next to it. The status is 'Closed 23 July 2019, 10:37' with a '2' next to it. The client is 'Agro Allian... Q\ Spielberg Stiv...' and the contract is 'SRV-12-3/N'. The service aim is '[not specified]'. The equipment is '[not specified]'. The request resolution is 'instruction was sent'. The description is 'I need it ASAP!!!' with a '1' next to it. Below the description are tabs for 'Comments (2)', 'Files (0)', 'Embedded tickets (0)', 'Quantities (0)', and 'Printed forms (1)'. The comments section shows two entries: one from 'Spielberg Stiven' dated '23 July 2019, 10:39' with a '4' next to it, and one from 'Paulson Robert' dated '23 July 2019, 10:37' with a '3' next to it. The right-hand sidebar contains various fields: 'Registration date: 23 July 2019, 10:36', 'Resolution date: 23 July 2019, 10:37', 'Planned resolution date: 29 July 2019, 14:36', 'Planned response time: 23 July 2019, 12:36', 'Response time: 23 July 2019, 10:37', 'Start execution until: [not specified]', 'Planned execution time (hours): [not specified]', 'Ticket type: Question \ consultation', 'Priority: Low', 'Registration method: Manager', and 'Responsible agent: Paulson Robert Service Desk' with a '3' next to it.

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:

16 How to export current sensor metrics? 

Client:  Agro Allian...  Spielberg Stiv...  Contract: SRV-12-3/N  Service aim:  [not specified] 

Equipment:  [not specified]  

Request resolution instruction was sent 

Description: I need it ASAP!!! 

Comments (2) Files (0) Embedded tickets (0)  Quantities (0)  Printed forms (1)

Public   Add a file   Send (ctrl + Enter)

Source  **B** *I* U            Tahoma 13px

body

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.

16 How to export current sensor metrics? 

Client: ● Agro Allian...  Q\ Spielberg Stiv...   Contract: SRV-12-3/N   Service aim: [?] [not specified] 

Equipment: [?] [not specified]  + 

Request resolution instruction was sent 

Description: I need it ASAP!!! 

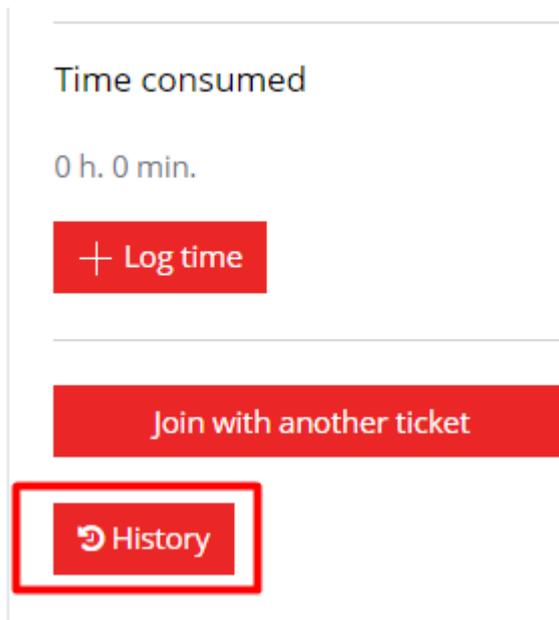
Comments (2) Files (1) Embedded tickets (0) [?] Quantities (0) [?] Printed forms (1)

You can just drag the required files from your desktop and drop them on the page  Download files  Add

 Okdesk_introduction.pdf 1.7 MB  01 June 2020, 17:54 

Has no description

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:

The screenshot shows the CRM interface with the 'Clients' section active. The left sidebar has 'Clients' highlighted. The main area displays a list of clients with columns for Name, Phone number, Email, Responsible manager, Viewers by default, and Date created. Two clients are listed: Agro Alliance and Fleet Logistic Ltd. A '+ Add' button is visible in the top right of the list area.

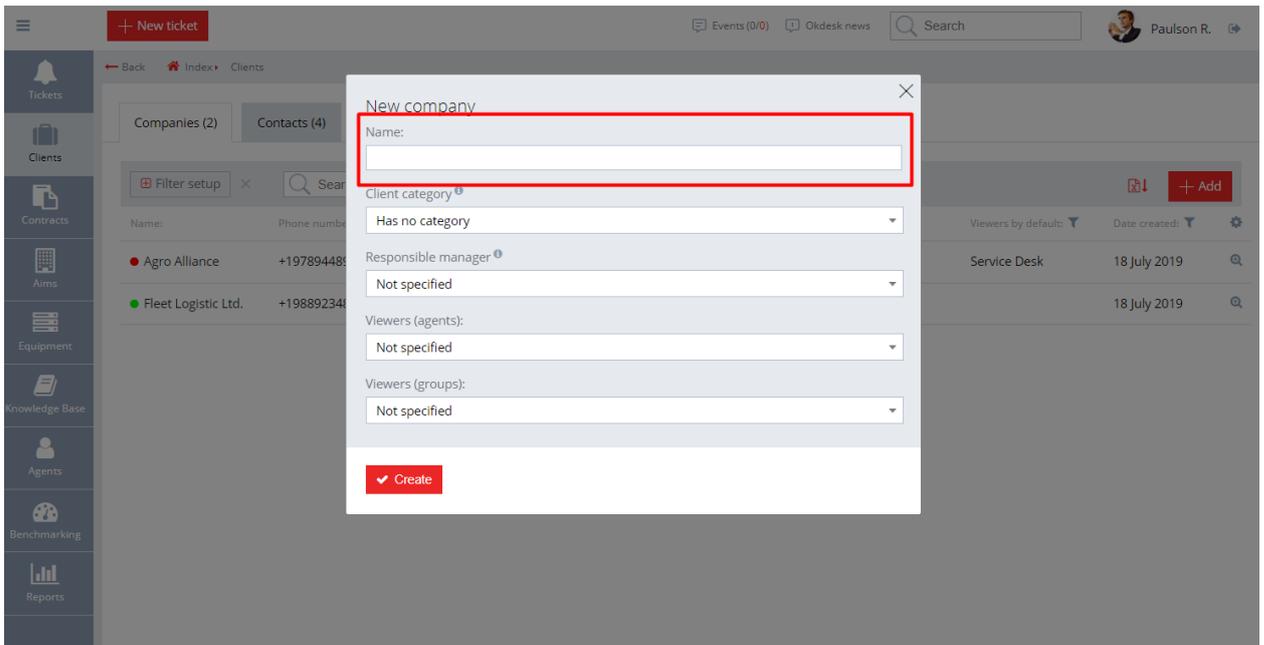
Name	Phone number	Email	Responsible manager	Viewers by default	Date created
Agro Alliance	+19789448910418	info@agroalliancedemo.okdesk.com	Accounting Department \ Paulson Robert	Service Desk	18 July 2019
Fleet Logistic Ltd.	+1988923489024	info@fleet-logistic-demo.okdesk.com			18 July 2019

Total: 2

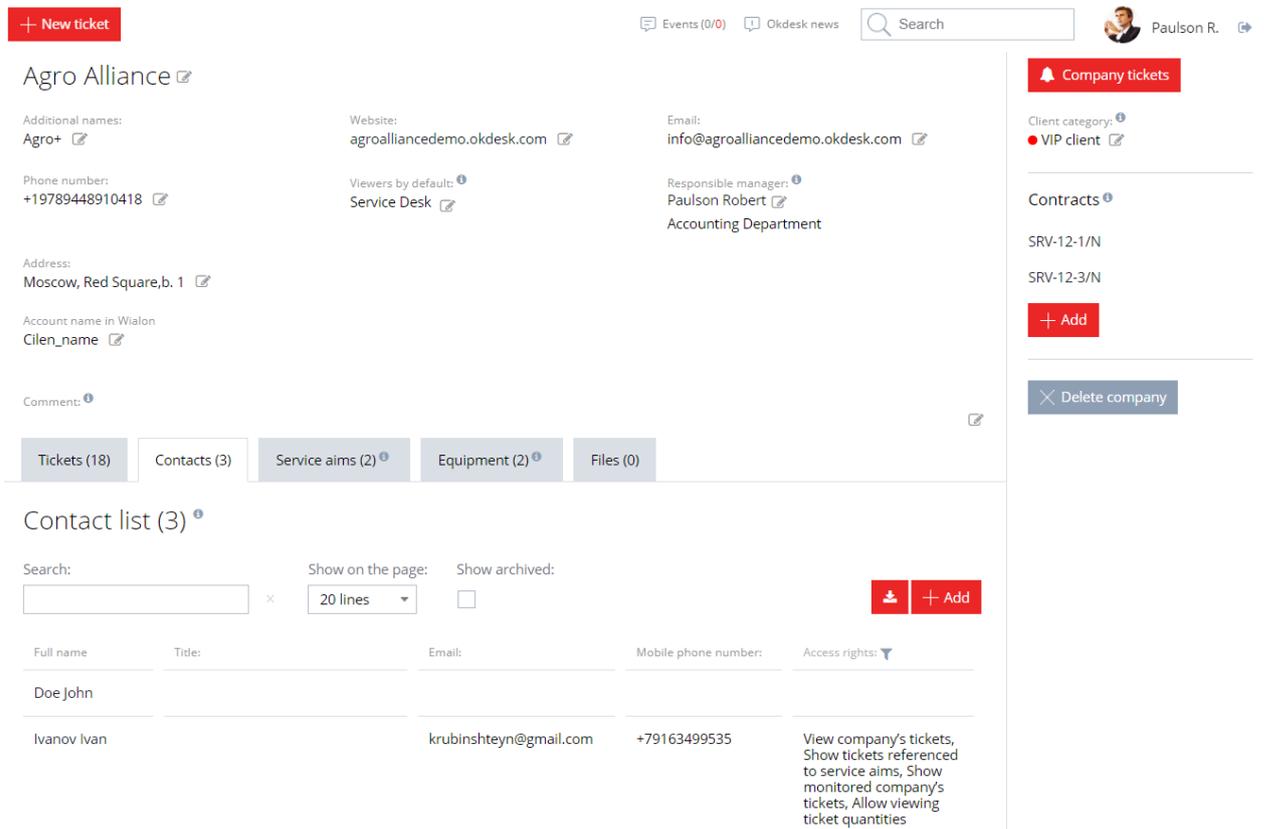
To add a new company to the directory, click on the '+ Add' button in the list of clients:

This screenshot is identical to the previous one, but with a red box highlighting the '+ Add' button in the top right corner of the client list area.

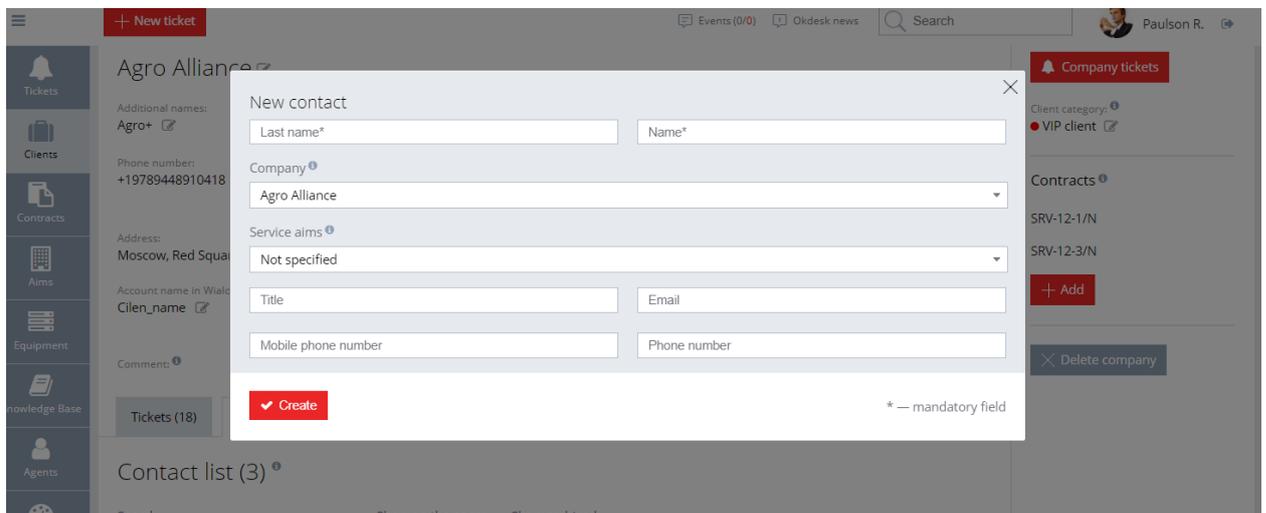
The form for adding a new client will open. When creating a client, the only mandatory field is 'Name' (the purpose of other parameters will not be discussed in this lesson):



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:



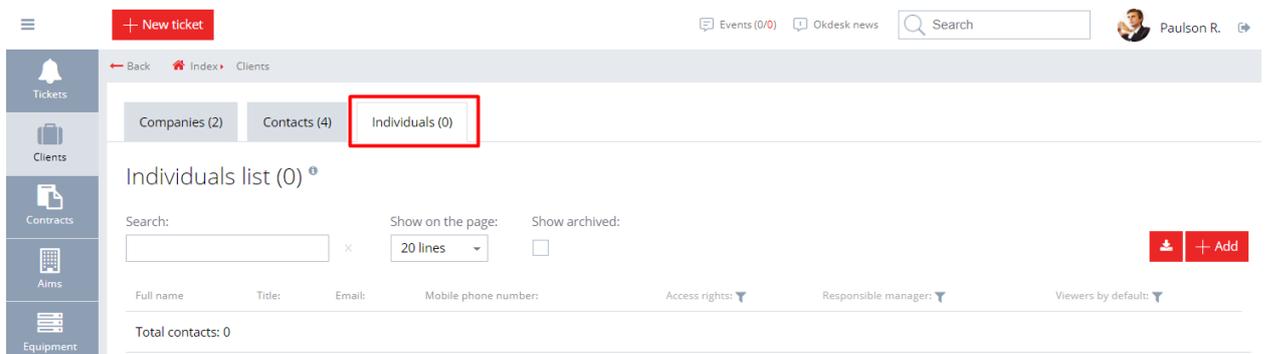
The screenshot shows a 'New contact' modal form overlaid on a dashboard. The form contains the following fields:

- Last name* (mandatory)
- Name* (mandatory)
- Company (dropdown menu, currently showing 'Agro Alliance')
- Service aims (dropdown menu, currently showing 'Not specified')
- Title
- Email
- Mobile phone number
- Phone number

At the bottom of the form is a red 'Create' button and a note: '* — mandatory field'. The background dashboard shows a sidebar with navigation options like Tickets, Clients, Contracts, Aims, Equipment, and Agents. The main content area shows details for a contact named 'Agro Alliance' and a 'Contact list (3)'.

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:



The screenshot shows the 'Individuals' tab selected in the 'Clients' section. The interface includes:

- Navigation tabs: Companies (2), Contacts (4), and Individuals (0) (highlighted with a red box).
- Search bar and filters: 'Search on the page' (set to 20 lines) and 'Show archived' (checkbox).
- Table header: Full name, Title, Email, Mobile phone number, Access rights, Responsible manager, Viewers by default.
- Summary: Total contacts: 0.
- Buttons: '+ Add' (red) and '+ Add' (white).

The background dashboard shows the 'New ticket' button and user profile 'Paulson R.'.

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:

The screenshot shows the 'Agents' section of the Okdesk interface. The top navigation bar includes a '+ New ticket' button, 'Events (0/0)', 'Okdesk news', a search bar, and the user profile 'Paulson R.'. The left sidebar contains various modules, with 'Agents' highlighted in red. The main content area is divided into two tabs: 'Agent list' and 'Agent map'. The 'Agent list' tab is active, showing a table of agents with columns for Full name, Title, Role, Email, Phone number, and Active status. There are also filters for 'Agents (3)', 'View: All', and 'Role: Not specified'. An '+ Add' button is visible in the top right of the table. Below the table, the 'Agent groups' section is visible, showing a table of agent groups with columns for Name, The agents included in the group, and Description. An '+ Add' button is also present in the top right of this section.

Full name	Title	Role	Email	Phone number	Active	
Joseph Kobsoon	Senior Service Engineer	Leading expert	kobsoon_j@fmi-eng-demo.okdesk.ru	+177766622534281	Yes	○
Paulson Robert	Chief Service Officer	Administrator	robert_p@fmi-eng-demo.okdesk.ru	+19992223338764	Yes	○
Wishes Sid	Service Engineer	Expert	wishes_s@fmi-eng-demo.okdesk.ru	+199988877766655	Yes	○

Name	The agents included in the group	Description	
Service Desk	Paulson R.		○🔗🔗
Service Engineers	Wishes S., Joseph K.		○🔗🔗
Accounting Department	Paulson R.		○🔗🔗

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).

Full name	Title	Active
Joseph Kobsoon	Senior	Yes
Paulson Robert	Chief S	Yes
Wishes Sid	Service	Yes

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):

Joseph Kobsoon

Last name: Joseph
Name: Kobsoon
Middle name: [not specified]
Title: Senior Service Engineer
Extension number: 102

Username: kobsoon_j
Email: kobsoon_j@fmi-eng-demo.okdesk.ru
Phone number: +177766622534281
Role: Leading expert

Active

Change password

Change username

Delete agent

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:

Agent groups

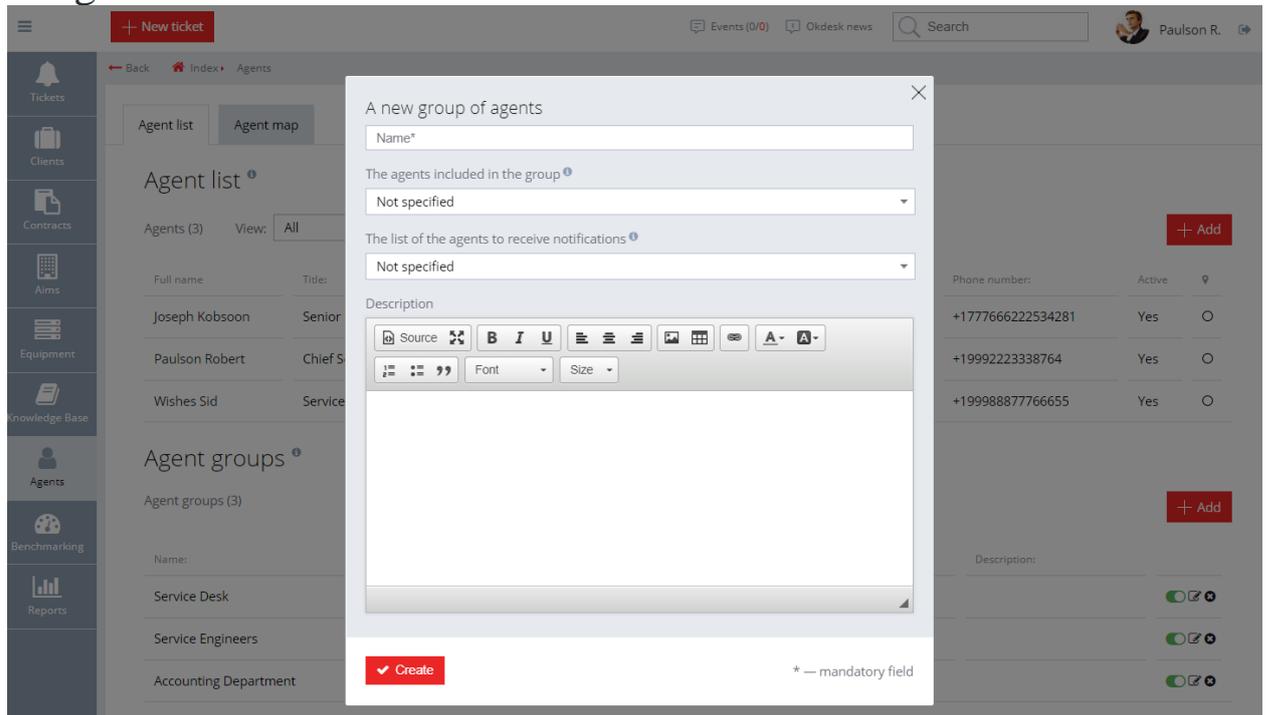
Agent groups (3)

Name:	The agents included in the group	Description:	
Service Desk	Paulson R.		🟢🔗🗑️
Service Engineers	Wishes S., Joseph K.		🟢🔗🗑️
Accounting Department	Paulson R.		🟢🔗🗑️

+ Add

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.

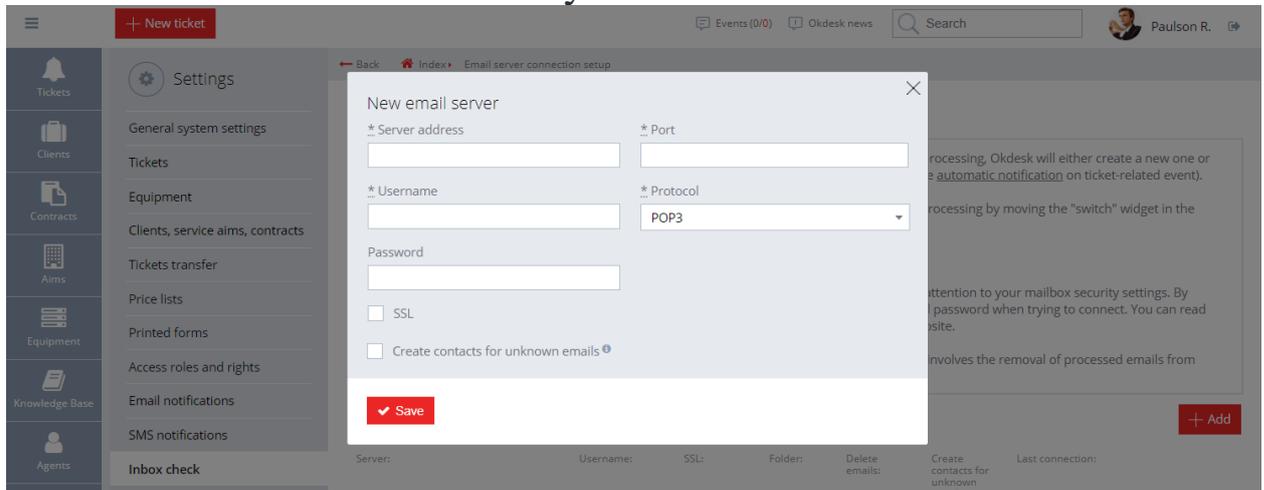
This is why Okdesk features an email processing module that automatically registers tickets for incoming emails. This allows clients to communicate with the support using their usual email program, and support agents to work with tickets through the Okdesk interface. This solves all of the above problems.

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

The screenshot shows the Okdesk interface. On the left is a sidebar with a 'Settings' menu. The 'Inbox check' option is highlighted with a red arrow. The main content area is titled 'Email server connection setup'. It contains a warning about POP3 and a table with columns: Server, Username, SSL, Folder, Delete emails, Create contacts for unknown emails, and Last connection. A red arrow points from the '+ Add' button in the table back to the 'Inbox check' menu item.

Server	Username	SSL	Folder	Delete emails	Create contacts for unknown emails	Last connection:
POP3: fleet-int.com:993	robert_p			✓	✓	🔗 🔄 🗑️

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.



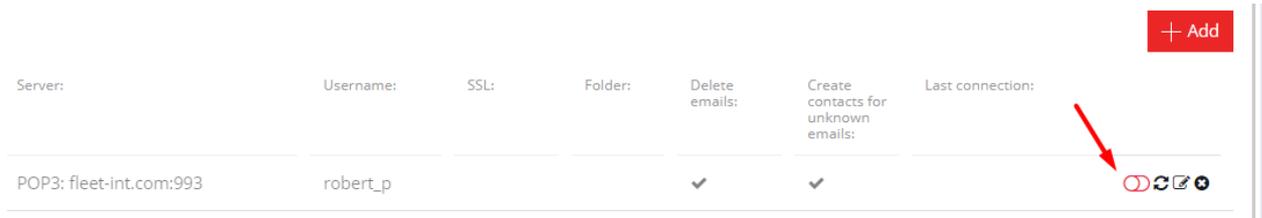
The form also contains the ‘Create contacts for unknown emails’ parameter. You may enable it if you want new contacts to be created when you receive an email from an unknown sender. Otherwise, if the ticket comes from an unknown email address, it will be created without a link to the company and contact.

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

Server:	Username:	SSL:	Folder:	Delete emails:	Create contacts for unknown emails:	Last connection:
POP3: fleet-int.com:993	robert_p			✓	✓	

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:



Server:	Username:	SSL:	Folder:	Delete emails:	Create contacts for unknown emails:	Last connection:
POP3: fleet-int.com:993	robert_p			✓	✓	

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

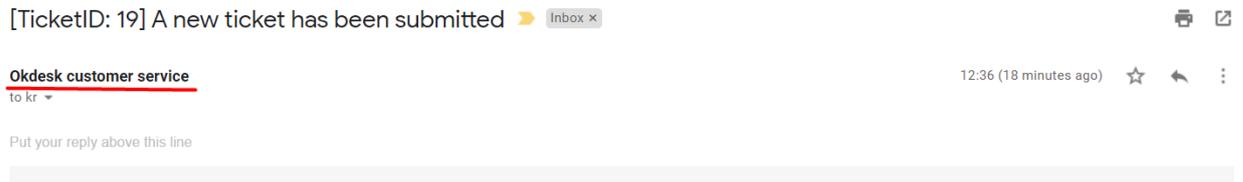
Configuring Ticket Notifications

2-minute lesson

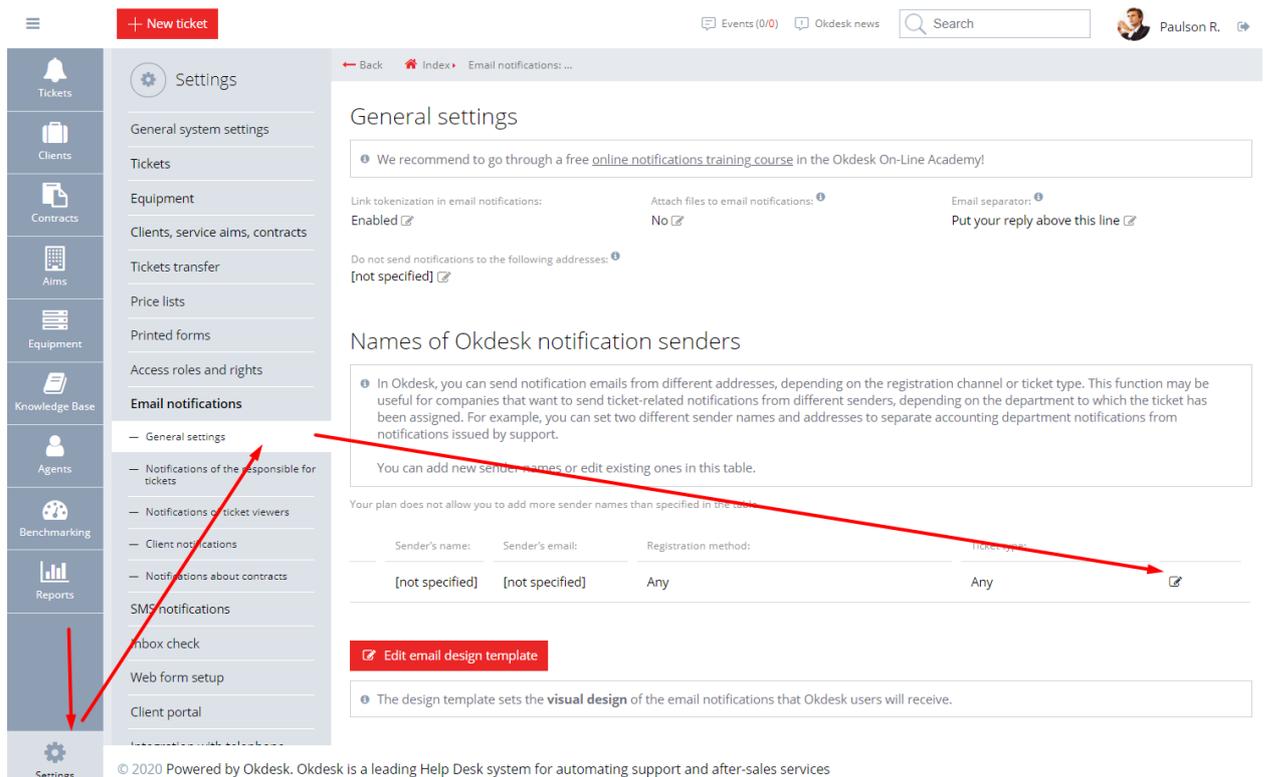
In the previous lessons, we discussed the basic actions taken on the tickets. To ensure that responsible agents and clients are always aware of what is happening, Okdesk has a module for sending email notifications, for example, when a ticket is created, a comment is added, a status is changed, or any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

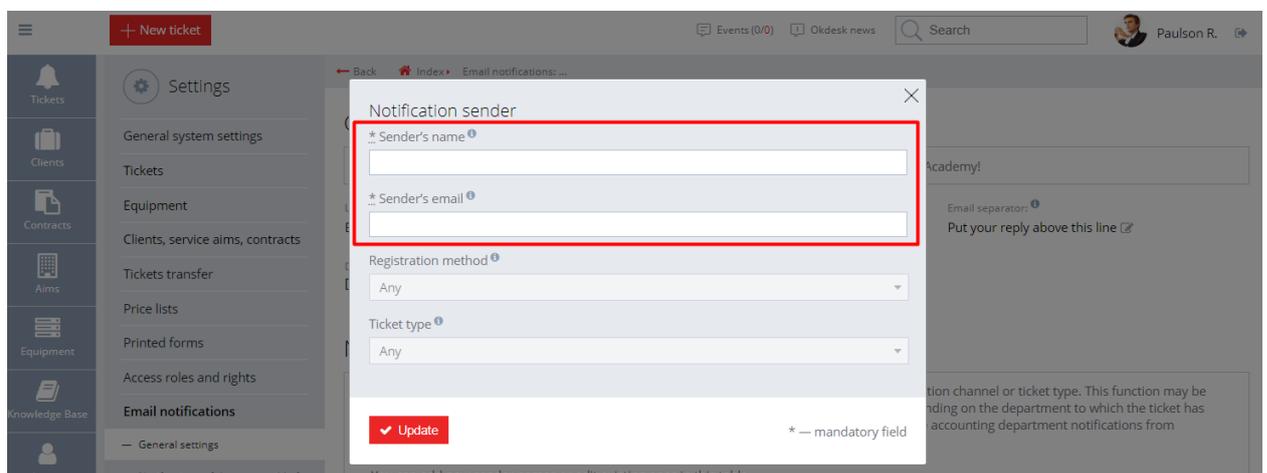
understand that they get these emails from your company's support service:



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

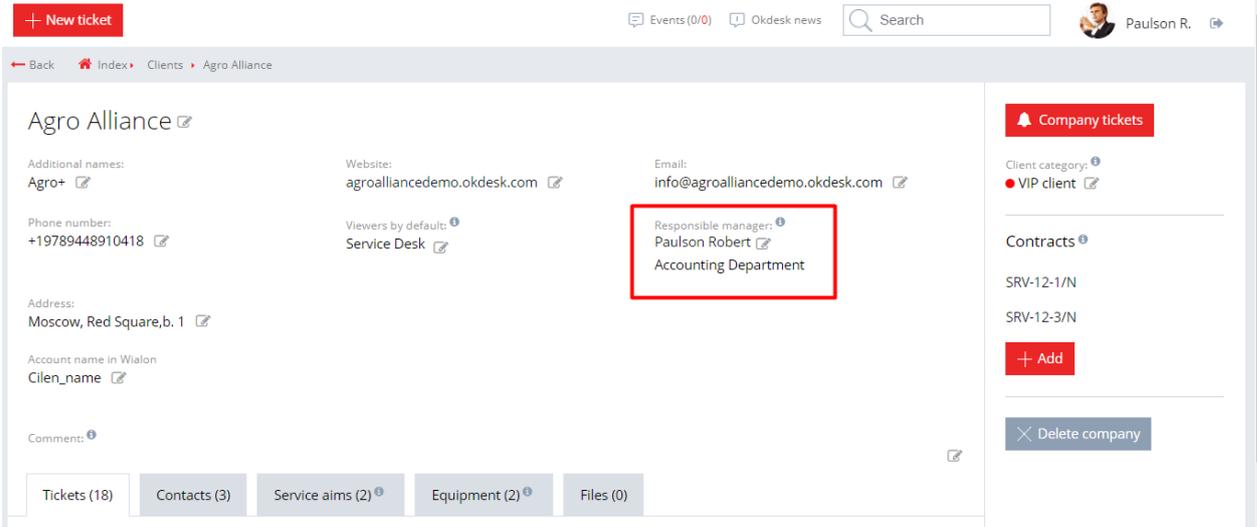
Automatic Assignment of Tickets to Responsible Agents (Routing)

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.

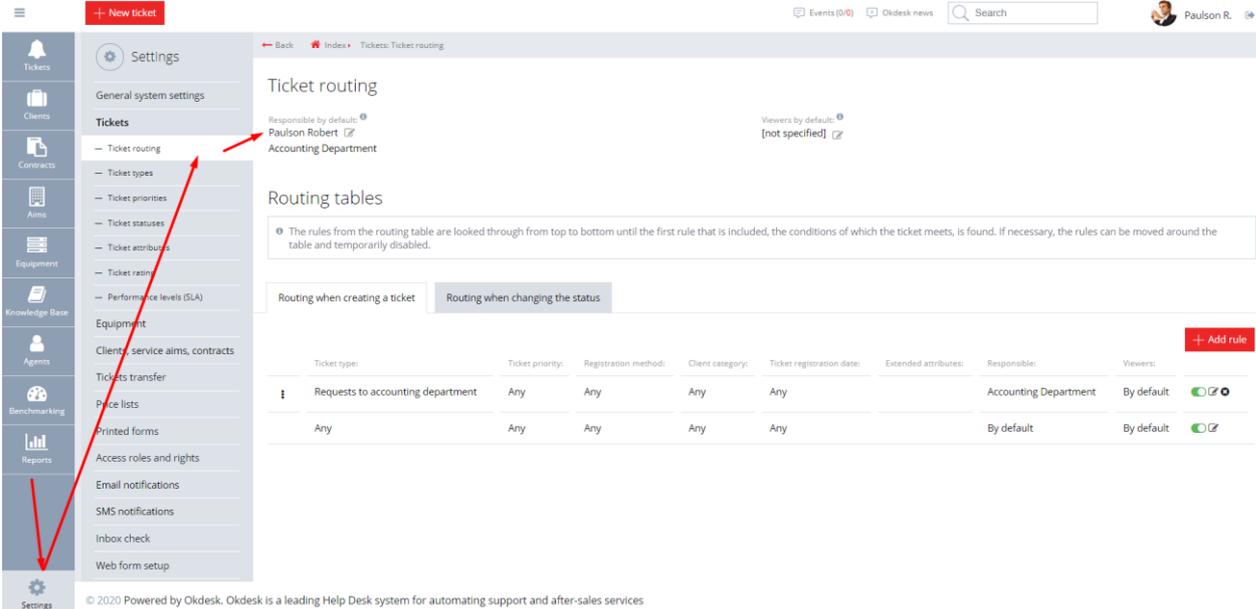
Okdesk has a powerful tool for automatic routing of tickets. In this course, we will not discuss all the features of this tool in detail, but will focus on its basic aspects: routing by client and routing by default.

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:



The screenshot displays the Okdesk user interface for a company profile. At the top, there is a navigation bar with a '+ New ticket' button, a search bar, and the user's name 'Paulson R.'. The main content area shows the profile for 'Agro Alliance'. The profile includes fields for 'Additional names' (Agro+), 'Website' (agroalliancedemo.okdesk.com), 'Email' (info@agroalliancedemo.okdesk.com), 'Phone numbers' (+19789448910418), 'Viewers by default' (Service Desk), 'Address' (Moscow, Red Square, b. 1), and 'Account name in Wialon' (Cilen_name). The 'Responsible manager' field is highlighted with a red box and contains the text 'Paulson Robert' and 'Accounting Department'. On the right side, there is a 'Company tickets' section with a 'VIP client' category, 'Contracts' (SRV-12-1/N, SRV-12-3/N), and buttons for '+ Add' and 'Delete company'. At the bottom, there are tabs for 'Tickets (18)', 'Contacts (3)', 'Service aims (2)', 'Equipment (2)', and 'Files (0)'.

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’:



The screenshot displays the 'Ticket routing' configuration page in Okdesk. The left sidebar contains a navigation menu with 'Settings' selected. The main content area shows the 'Ticket routing' settings, including 'Responsible by default' set to 'Paulson Robert' and 'Viewers by default' set to '[not specified]'. Below this is a 'Routing tables' section with a table of rules for routing tickets.

Ticket type:	Ticket priority:	Registration method:	Client category:	Ticket registration date:	Extended attributes:	Responsible:	Viewers:	
Requests to accounting department	Any	Any	Any	Any		Accounting Department	By default	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Any	Any	Any	Any	Any		By default	By default	<input checked="" type="checkbox"/> <input type="checkbox"/>

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.