

# What is this course about?

1-minute lesson

Okdesk is a cloud Helpdesk system.

The market has a lot of Helpdesk systems to offer. How is Okdesk different from the rest of them? We could mention unique competitive advantages, professional approach, and quality support. But these are just some overused words that any software developer can write about itself. So, how can you sort through the variety of ticket registration systems and choose exactly what your company needs?



Instead of advertising ourselves and offering catchy slogans, we have prepared a short course on the capabilities of the Okdesk system. We are sure that this approach will allow you to make the right decision when choosing an automation tool for your business.

Let's begin!

# What tasks can be solved with Okdesk?

1-minute lesson

In fact, what differs Okdesk from other Helpdesk solutions is that it focuses on the needs of service companies and is evolving in accordance with these needs. Thus, Okdesk is a specialized Helpdesk system for the service business focused on service automation.

If your company's clients are other businesses that you work with under a contract, and if the contract contains service levels and standards (SLA), we expect you to be among our clients :)

Among Okdesk clients are several hundred companies from the following industries:

- Automated sorting centers and technical service centers for cash and retail equipment;
- Maintenance services for commercial real properties (business centers, office centers, shopping centers, warehouse complexes, industrial facilities);
- Maintenance services for cafes, restaurants and food service companies;
- IT service companies (IT outsourcing) and 1C franchising;
- Implementation and maintenance of navigation and transport monitoring systems;
- And many others.

It should be noted that Okdesk users are not just service companies, but also internal service departments (IT, administration and maintenance, operation) of companies with geographically distributed points of presence: retail, chain restaurants and cafes, manufacturing enterprises.



Owing to Okdesk focus on the needs of the service business, it has features that help raise the level of service profitability, increase the ‘average bill’ and reduce client outflow.

In the next lessons, we will talk about the main Okdesk functions and tasks that Okdesk helps to solve.

[Next lesson](#)

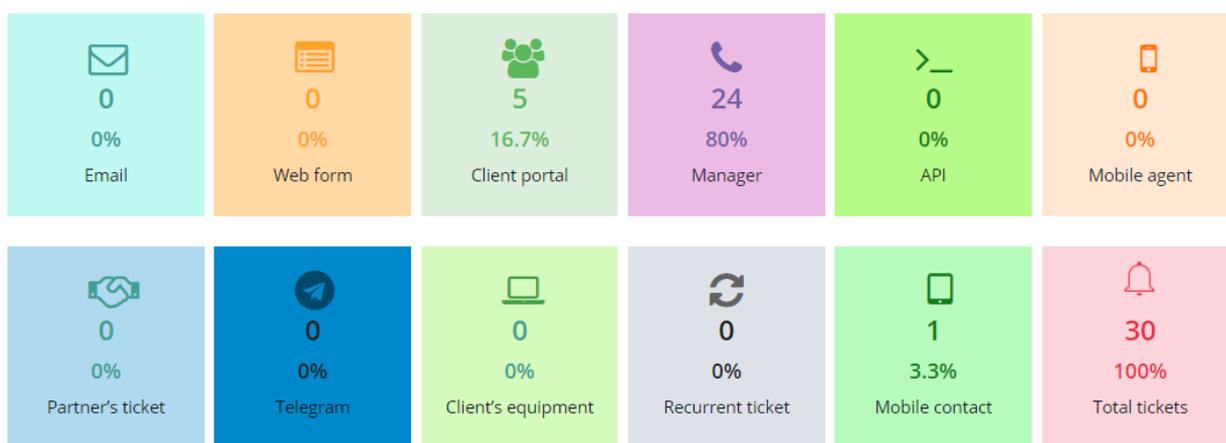
*Lesson 3 of 10*

# Registration and Resolution of Client Tickets

3-minute lesson

Service companies deal with client requests: incidents, service requests, and consultation requests. Therefore, the main item in Okdesk is the client ticket. Tickets are created in Okdesk for all client requests, processed by responsible agents and followed by relevant reports. In this lesson, we will look at the main features of Okdesk relating to ticket processing.

In the provision of services, it is important to ensure that interaction with the service department is convenient for the client. Therefore, a ticket can be received in Okdesk via a variety of convenient channels (phone call to an operator, email, client portal, web form on the website, Telegram bot, and many others):



Once a ticket is in Okdesk, it is immediately assigned to a responsible agent or a group/team of agents. All actions taken on the ticket are logged in the event history, which means that in the case of a conflict situation, you can view the history and figure out who is right and who is wrong.

In the process of providing services, agents of the service company can leave comments on tickets: responding to inquiries, asking clarifying questions or making notes hidden from clients. When an agent responds to a client ticket, the response is sent to the client. The client can respond to the notification, and their response will be automatically 'attached' to the ticket. Furthermore, the entire history of communication with the service department, including tickets and related correspondence, is stored in Okdesk and available on the client portal.

The screenshot displays a ticket management interface. At the top left, there is a '+ New ticket' button. A search bar is located at the top right. The main content area shows a ticket titled 'Accounting documents for 2nd quarter are needing'. The ticket details include: Client: Agro Alliance, Contract: SRV-12-3/N, Service aim: John DERR 989 A11 +87789123791, and Equipment: [not specified]. The request resolution is 'documents were sent'. The description field contains a 'Checklist' tab. Below the description, there are tabs for 'Comments (1)', 'Files (0)', 'Embedded tickets (0)', 'Quantities (0)', and 'Printed forms (1)'. A comment from Paulson Robert is visible, dated 22 July 2019, 11:13, with the text 'Take it in attachment'. On the right side, a sidebar shows the ticket's status as 'Closed 25 July 2019, 10:54' and provides a summary of key dates and times: Registration date (22 July 2019, 11:13), Resolution date (25 July 2019, 10:54), Planned resolution date (26 July 2019, 15:13), Planned response time (22 July 2019, 13:13), and Response time (22 July 2019, 11:13). It also lists the ticket type as 'Requests to accounting dep...', priority as 'High', and registration method as 'Manager'. The responsible agent is identified as Paulson Robert from the Service Desk, and the number of viewers is listed as '[not specified]'.

For prompt ticket resolution (including independent resolution by the client), Okdesk has a Knowledge Base. This can be used to store instructions, descriptions of ways to resolve typical incidents, and internal documentation. Access to certain sections of the Knowledge Base can also be granted to clients.

For agents of the service company, the system offers a convenient and fast search for answers in the Knowledge Base when resolving tickets. If the desired solution is found, the agent may paste the answer in their comment 'in a few clicks'.

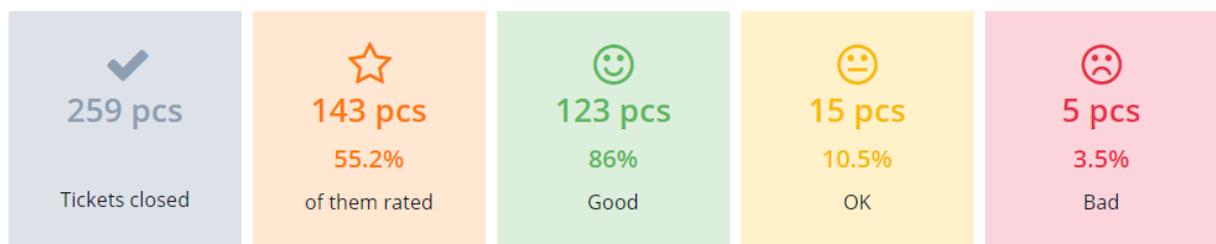
The screenshot shows the Knowledge Base interface. At the top left, there is a '+ New ticket' button. A search bar is located at the top right. The main content area displays 'Instructions for clients'. Below this, there are sections for 'Sections (0)', 'Articles (0)', and 'Files (0)'. A red '+ Add an article' button is visible next to the 'Articles (0)' section. Below the 'Files (0)' section, there is a text prompt: 'You can just drag the required files from your desktop and drop them on the page', followed by a red '+ Add' button. On the left side, there is a vertical navigation menu with icons for Tickets, Clients, Contracts, Aims, Equipment, Knowledge Base (which is currently selected), Agents, Benchmarking, and Reports.

A special module (SLA module) is implemented to monitor compliance with the requirements for solving tickets: depending on

the ticket parameters, it is automatically assigned a standard resolution time and a service schedule. For example, you can implement a rule where first-priority incidents from VIP clients will be processed around the clock within 2 hours, and requests for consultations will only be processed on business days from 9:00 am to 6:00 pm during 8 business hours. The logic for defining standards is configured individually for each service company, based on the accepted service standards. To monitor compliance with the regulations, Okdesk provides a report that allows to analyze regulatory metrics in different dimensions:



To control the quality of client service, after the ticket resolution clients are offered to rate the service. Thanks to this function, you will be able to control the quality of service in a ‘real time mode’, all the way down to each particular ticket:



Lesson 4 of 10

# Paid Tickets and Scheduled and Preventive Maintenance

2-minute lesson

Resolving incident or consultation requests is not the only task of a service company. In addition to works included in the contract, there may be tickets that are paid additionally. For this purpose, Okdesk

provides a ‘Price List’ module, which allows you to store the company’s assortment of products, services and works.

General services, works and materials price list of the company + Add

Search:  × View: All ▾

Section:	Code:	Name:	Unit of measure:	Unit price:	Including VAT (%)	Description:	
Services	sensor_diag	Sensor diagnostic (without a visit)	unit	100	0		<input checked="" type="checkbox"/> <a href="#">✕</a>
	study	Studying to work in Wialon (Base level)	course	250	0		<input checked="" type="checkbox"/> <a href="#">✕</a>
	tank_calibration	Tank calibration	tank	150	0		<input checked="" type="checkbox"/> <a href="#">✕</a>
	timerateservice	Sensor installation (without a visit)	unit	100	0		<input checked="" type="checkbox"/> <a href="#">✕</a>
	visit_not_warranty	Service engineer visit (not warranty)	visit	75	0		<input checked="" type="checkbox"/> <a href="#">✕</a>
	visit_warranty	Service engineer visit (warranty)	visit	50	0		<input checked="" type="checkbox"/> <a href="#">✕</a>

Let us consider an example. Say, a service company provides comprehensive maintenance services for restaurants. In this case, incident tickets are served ‘without limit’. But tickets for any changes and improvements (socket installation, lock change) are paid separately. Using the ‘Price list’ module, you can include standard operations (‘Socket installation’, ‘Lock fitting and change’, etc.) into the system. If a relevant ticket is received from the client, you can prepare a work specification for this ticket. Then, you can upload an invoice and send it to the client. At the end of the period, you can get a report on paid works performed and consumables spent.

Ticket quantities summary

Company: Not specified × Responsible: Not specified × Add fields to the summary: Not specified ×

Resolved during the period:  × —  × Status: Selected (2) × Price list section: Selected (3) ×

Registered during the period:  × —  ×  Service aims breakdown

[Download](#) [Show](#)

Company	Ticket	Status	Responsible	Name	Quantity	Unit of measure	Cost	Incl. VAT
Agro Alliance	8	Closed	Paulson Robert	Sensor diagnostic (without a visit)	1	unit	100	0
	21	Closed	Joseph Kobsoon	Sensor installation (without a visit)	1	unit	100	0
Fleet Logistic Ltd.	4	Closed	Paulson Robert	Studying to work in Wialon (Base level)	1	course	250	0
	9	Closed	Joseph Kobsoon	Sensor diagnostic (without a visit)	1	unit	100	0
	14	Closed	Wishes Sid	Service engineer visit (not warranty)	1	visit	75	0

But this is not all! :) Many service companies perform routine maintenance for the client’s equipment or infrastructure. For example,

regular scales calibration or scheduled maintenance for HVAC systems. In order not to forget to perform regular routine tasks on schedule, Okdesk has a function of recurring tickets. When creating a ticket, you can specify a recurrence period, and Okdesk will automatically repeat this ticket after a specified period of time (once a week, once a month, once a quarter, and so on).

The screenshot shows the 'New ticket' form in Okdesk. The form is divided into several sections:

- Subject:** A text input field containing 'Regular service'.
- Ticket type:** A dropdown menu with 'Service visit' selected.
- Priority:** A dropdown menu with 'Low' selected.
- Desirable start date:** A date picker field.
- Desirable end date:** A date picker field.
- Description:** A rich text editor with a toolbar containing icons for source, bold, italic, underline, list, link, image, table, and text color. The font is set to 'Tahoma' and size to '13px'.
- Client:** A dropdown menu with 'Agro Alliance' selected.
- Contract:** A dropdown menu with 'Not specified' selected.
- Service aim:** A dropdown menu with 'John DERR 989 A11 +87789123791' selected.
- Equipment:** A dropdown menu with 'Selected (1)' selected.
- Responsible agent:** A dropdown menu with 'Accounting Department \ Paulson Robert' selected.
- Planned resolution date:** A date and time picker showing '2020/06/08 12 : 12'. Below it is a 'Specify manually' button.
- Recurrent ticket:** A section highlighted with a red box, containing:
  - A toggle switch labeled 'Recurrent ticket' which is turned on.
  - A field for '\* Next recurrence' with a date and time picker set to '00 : 00'.
  - A field for '\* Repeat after' with a dropdown menu set to 'days' and options for 'weeks' and 'months'.

At the bottom left, there is a red '+ Add files' button. At the bottom center, there is a red 'Create' button. At the bottom right, there is a note: '\* — mandatory field'.

In addition to recurring tickets for the client infrastructure, you can create internal recurring tickets. For example, tasks for issuing invoices or making regular calls to clients to maintain a good relationship.

*Lesson 5 of 10*

## Printed forms

1-minute lesson

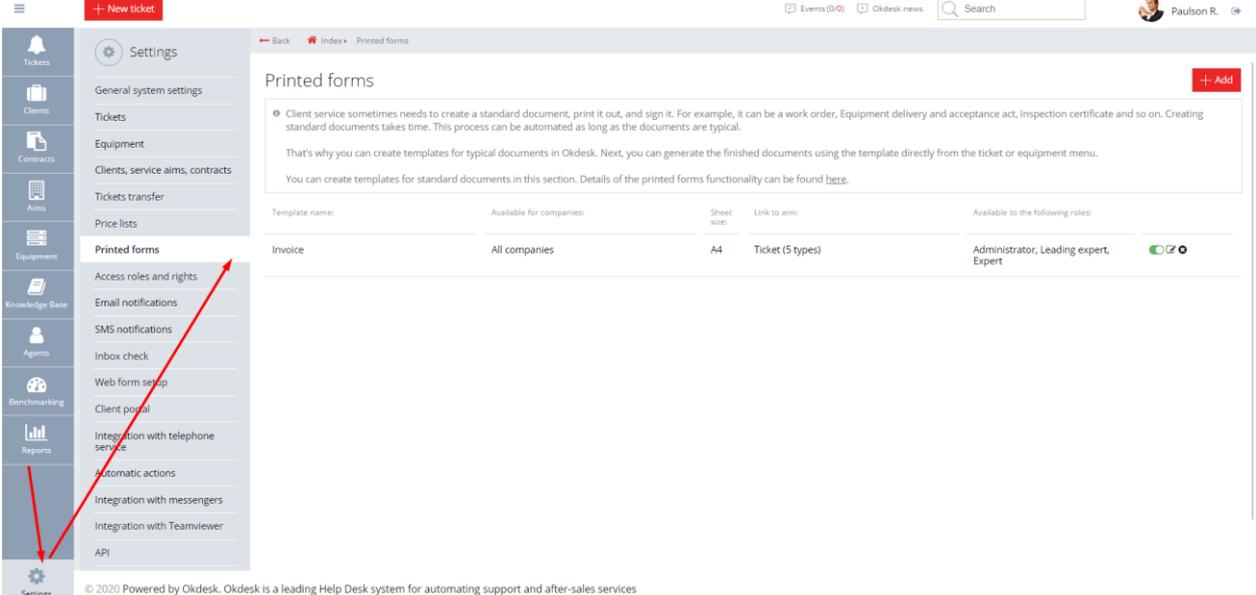
We live in an age of digital communication: messengers, emails, and legally significant document flow — these terms and phrases have become part of our everyday life. However, paper documents are still ‘in use’ and it is hard to predict how long the good old ‘paper’ will be used for document storage purposes.

How often do we have to print out documents when providing service to clients? In fact, it is not infrequent at all. For example, when an engineer goes on a field assignment to the client’s office, they often have to take a printed work order with them. The engineer must have this work order signed by the client upon resolution of the ticket as a confirmation of the work completion.

Another example is acceptance of the client’s equipment for repair (or routine maintenance). In this case, you must print and sign several paper documents: the equipment acceptance certificate, the equipment inspection report, the work order for equipment repair, etc.

It appears that in the provision of services to clients, we regularly need to create a standard document, print it out and have it signed (or email the document to a contact). The creation of standard documents takes time. But as templates are often used, this process can be automated.

For these tasks, Okdesk has a ‘Print forms’ module, which allows to create a standard template-cased document for a ticket or for an equipment card ‘in a few clicks’:



The screenshot shows the Okdesk 'Printed forms' module. The sidebar on the left contains various navigation options, with 'Printed forms' highlighted. The main content area displays the 'Printed forms' section, which includes a table listing templates. The table has columns for 'Template name', 'Available for companies', 'Sheet size', 'Link to aim', and 'Available to the following roles'. The 'Invoice' template is listed with 'All companies' as the available companies, 'A4' as the sheet size, and 'Ticket (5 types)' as the link to aim. The roles available for this template are 'Administrator, Leading expert, Expert'.

Template name	Available for companies	Sheet size	Link to aim	Available to the following roles
Invoice	All companies	A4	Ticket (5 types)	Administrator, Leading expert, Expert

You can use context variables while making printed forms templates. If you generate document using template from the certain ticker or equipment, context variables will be changed by the value of the certain attribute of the ticket. Context variables have to be surrounded by {{{ (left) and }}} (right). For example, if you want to use ticket client name in a template, write {{{ISSUE.COMPANY.NAME}}} in a template. The full list of context variables is here

[https://okdesk.com/email\\_data](https://okdesk.com/email_data)

*Lesson 6 of 10*

# CRM Module: Directories of All Clients and Contracts in One Place

*2-minute lesson*

Okdesk is a Helpdesk system specializing in providing services to b2b clients (i.e. other companies). Therefore, we could not but implement a CRM module in the system, which allows us to keep track of clients and service contracts concluded with them.

The system stores detailed contact information and a list of contacts for each client. In addition, responsible agents from your company can be assigned to each client.

The screenshot shows the Okdesk interface for a client named 'Agro Alliance'. The top navigation bar includes a '+ New ticket' button, 'Events (0/0)', 'Okdesk news', a search bar, and the user profile 'Paulson R.'. The breadcrumb trail is 'Back > Index > Clients > Agro Alliance'. The client details section includes:
 

- Additional names: Agro+
- Website: agroalliancedemo.okdesk.com
- Email: info@agroalliancedemo.okdesk.com
- Phone number: +19789448910418
- Viewers by default: Service Desk
- Responsible manager: Paulson Robert
- Accounting Department
- Address: Moscow, Red Square, b. 1
- Account name in Wialon: Clen\_name

 Below the details are tabs for 'Tickets (18)', 'Contacts (3)', 'Service aims (2)', 'Equipment (2)', and 'Files (0)'. A filter section shows 'Recurrent' (unchecked), 'Sort by: the time registered', 'Show on the page: 20 lines', and 'Automatic list update: disabled'. The main table lists tickets with columns for Ticket No, Subject, Client, Responsible, Registration date, Service aim, and Status.

Ticket No	Subject	Client	Responsible	Registration date	Service aim	Status
000030	Sensor installation	Agro Alliance	Paulson R.	04 September 2019, 15:58	John DERR 989 A11 +8778912375	Wait to sch...
000029	Something doesn't work	Agro Alliance	Service Desk \ Paulson R.	04 September 2019, 15:19	John DERR 989 A11 +8778912375	Wait to sch...
000028	Something doesn't work	Agro Alliance	Accounting Dep... \ Pauls...	04 September 2019, 15:16	John DERR 989 A11 +8778912375	Closed
000027	New task	Agro Alliance	Service Engine... \ Joseph ...	16 August 2019, 14:25	John DERR 989 A11 +8778912375	Opened

Okdesk maintains a register of concluded service contracts for all clients. Contract storage in Okdesk has a special feature allowing to take into account service periods. Why is this necessary? For example, a service contract may be concluded for a year, but within the year, payments are made on a monthly or quarterly basis. This is why Okdesk has the following special feature for service companies: you can create the required number of service periods for each contract, specify the cost of each period, the start date, the end date, and record the payment (once the money is received):

The screenshot shows the Okdesk interface for a specific contract 'SRV-12-1/N'. The top navigation bar is identical to the previous screenshot. The breadcrumb trail is 'Back > Index > Clients > Agro Alliance > SRV-12-1/N'. The contract details section includes:
 

- Companies: Agro Alliance
- Start date: 01 July 2018
- Completion date: 31 October 2020
- Cost: 10 000

 Below the details are tabs for 'Service terms (4)', 'Files (0)', and 'Tickets (1)'. A table lists the service terms with columns for Start date, End date, Comment, Completion reminder, Cost, Postpaid, and Paid.

Start date	End date	Comment	Completion reminder	Cost	Postpaid	Paid
01 August 2020	31 October 2020	Infrastructure maintenance (3-month plan)		2 500		No
01 May 2020	31 July 2020	Infrastructure maintenance (3-month plan)		2 500		Yes
01 October 2018	31 December 2018	Infrastructure maintenance (3-month plan)		2 500		Yes
01 July 2018	30 September 2018	Infrastructure maintenance (3-month plan)		2 500		Yes

Okdesk will automatically track the date of the next payment and notify the manager about the need to issue an invoice when that date is coming up. And if the client does not make the next payment, Okdesk

will notify operators when they create tickets that this client has an overdue payment:

New ticket

\* Subject  
Ticket subject

Ticket type <sup>i</sup> Priority <sup>i</sup>  
Service visit Low

Desirable start date Desirable end date

Description

Source **B** **I** **U**

Font Size

+ Add files

Client Create  
● Agro Alliance

Contract Create  
SRV-12-3/N  
Warning! The contract has no valid service term as of today

Service aim <sup>i</sup>  
Not specified

Equipment <sup>i</sup> Create  
Not specified

Responsible agent  
Accounting Department \ Paulson Robert

Planned resolution date <sup>i</sup>  
2020/06/08 12 : 18  
Specify manually

Recurrent ticket <sup>i</sup>

✓ Create \* — mandatory field

All tickets received from clients are linked to the relevant companies, contacts, and contracts of the CRM module. This means that you can always view the service history of a specific client for a specific contract.

But this is not all :) The service company may be servicing client equipment located in different buildings (stores, points of sale, and other locations). This is why Okdesk includes a module for accounting buildings (service aims) and client equipment. We will discuss this module in more detail in the next lesson.

# Buildings and Equipment: Inventory Count of Serviced Infrastructure

2-minute lesson

In the previous lesson, we mentioned that service companies accept for servicing various client locations (stores, points of sale, additional offices, etc.) and equipment installed in those locations. As Okdesk is a specialized Helpdesk system for service companies, we could not but provide a module for accounting for client service aims and equipment.

For each client, you can store an unlimited number of client locations in Okdesk: buildings, supplementary offices, stores, cafes, outlets, etc. For each service aim, you can specify its address and client's contacts working at this facility. It is important to note that a single contact can be linked to multiple service aims. For example, it can be the administrator of several points of sale in the same area.

The screenshot displays the Okdesk user interface for a service aim. At the top, there is a navigation bar with a '+ New ticket' button, 'Events (0/0)', 'Okdesk news', and a search bar. The user profile 'Paulson R.' is visible in the top right corner. The main content area shows the details for a service aim titled 'Omega business center'. The form includes fields for 'Address' (Market Street, San Francisco), 'Company' (Agro Alliance), 'Service schedule' (On weekdays, 9 a.m. to 6 p...), 'Responsible' (Paulson Robert, Accounting Department), 'Unit unique ID in Wialon' (not specified), 'Unit phone number' (not specified), 'Device type' (not specified), 'Unit name' (not specified), and 'Unit ID in Wialon' (not specified). A map of the area is shown below the form, with a red pin indicating the location. At the bottom, there are tabs for 'Tickets (0)', 'Contacts (0)', 'Equipment (0)', and 'Files (0)'. On the right side, there is a 'Tickets by aim' section with a 'Delete aim' button.

For each client facility, you can keep a list of equipment stored on the facility. In addition, the equipment may be linked not to a specific

service aim, but to the client (for example, if you don't want to keep record of locations, but want to keep record of client equipment).

All equipment is classified by type, manufacturer, and model. You can set your own 'attribute model' for each type of equipment, i.e. you can set additional attributes that are unique to this equipment type. For example, for the equipment type 'Cash register' you can add the 'Fiscal drive expiration date': this will allow you to get a statement on all cash registers with the date of fiscal memory device replacement in the following month in order to plan your work with the client.

The screenshot displays the Okdesk web interface for a specific ticket. At the top, there is a '+ New ticket' button and a search bar. The breadcrumb trail shows: Back > Index > Clients > Fleet Logistic Ltd. > Sensor INV Fuel consumption sensor. The main content area is titled 'Sensor INV Fuel consumption sensor' and contains the following details:

- Type, manufacturer, model: Sensor
- Inventory number: Fuel consumption sensor
- Serial number: [not specified]
- Company and service aim: Fleet Logistic Ltd.NSCANIA H884JH 4a Visi...
- Sensor type: absolute fuel consumption
- Sensor ID: 1
- Comment: (empty)

Below the details, there are tabs for 'Files (0)' and 'Tickets (1)'. The 'Tickets (1)' tab is active, showing a table with one ticket:

Recurrent	Sort by:	Show on the page:	Automatic list update:	Ticket No	Subject	Client	Responsible	Status
<input type="checkbox"/>	the time registered	20 lines	disabled	000009	Sensor data is not sent to the server	Fleet Logistic Ltd.	Service Desk \ Paulson R.	Closed

At the bottom, it says 'Total tickets: 1'. On the right side, there are buttons for 'Tickets by equipment', 'Delete equipment', and 'History'.

When creating client tickets, you can specify on which facility and equipment service works will be performed. This means that the entire service history stored will be linked to the client's infrastructure.

In this lesson, we covered the topic of client locations. For resolution of such tickets, 'field work' is often necessary. This is why the next lesson focuses on the Okdesk mobile app, which helps field agents resolve client tickets more efficiently.

*Lesson 8 of 10*

# 'Field' Work: Engineer's Mobile Workplace and Displaying Tickets on the Map

If a service company provides services involving field visits to the client's facilities, effective communication between clients, operators and field agents is essential. For this purpose, we have developed the Okdesk mobile app — a mobile workplace for field engineers.

The Okdesk mobile app features a function for creating new tickets (with incident photographs). Field agents can view tickets assigned to them and their content, discuss the tickets in comments, and close the tickets (with photo proof of the fact of work completion). We have also implemented a number of 'perks' that make the work of field engineers more convenient. For example, if you click on the address of a field ticket in the mobile app, a map showing the client's address will open.

For all ticket events, including the assignment of new tickets, field engineers will receive instant push notifications on their smartphones. This means that the agents will be informed of all changes and the operator will not have to spend time to call and report new information.

For places where there is no Internet connection, the mobile app has an offline mode that allows to view saved tickets.

For effective distribution of field tickets, operators can use a map showing the current position of agents and tickets on the map — this means that they can assign a ticket to the nearest agent, thereby reducing logistics costs.

In this lesson, you were made familiar with the Okdesk mobile app, which allows to organize field work. However, for effective planning of field tickets for specialists you will also need other tools. And Okdesk has them! In the next lesson, we will talk about a calendar for planning agent workload that shows the current load and allows for quick distribution of tasks that have not yet been assigned.

# Planning Agent Workload: Calendar

6-minute lesson

For effective distribution of tickets among agents, you need the following:

- To see the current workload of agents for a few days ahead;
- To see the list of undistributed tickets;
- To have a tool for quick redistribution of tickets by days and agents.

And Okdesk can proudly offer such a tool — workload planning calendar. The calendar works in 2 modes: monthly planning and weekly planning.

The monthly planning mode is necessary to balance the load by the days of the month. When you open the monthly planning mode, the operator sees the number of tickets evaluated for each day of the month. Okdesk highlights the ‘busiest’ days in red, and the ‘lowest’ in green. The operator’s task is to distribute field tickets uniformly by days of the month:

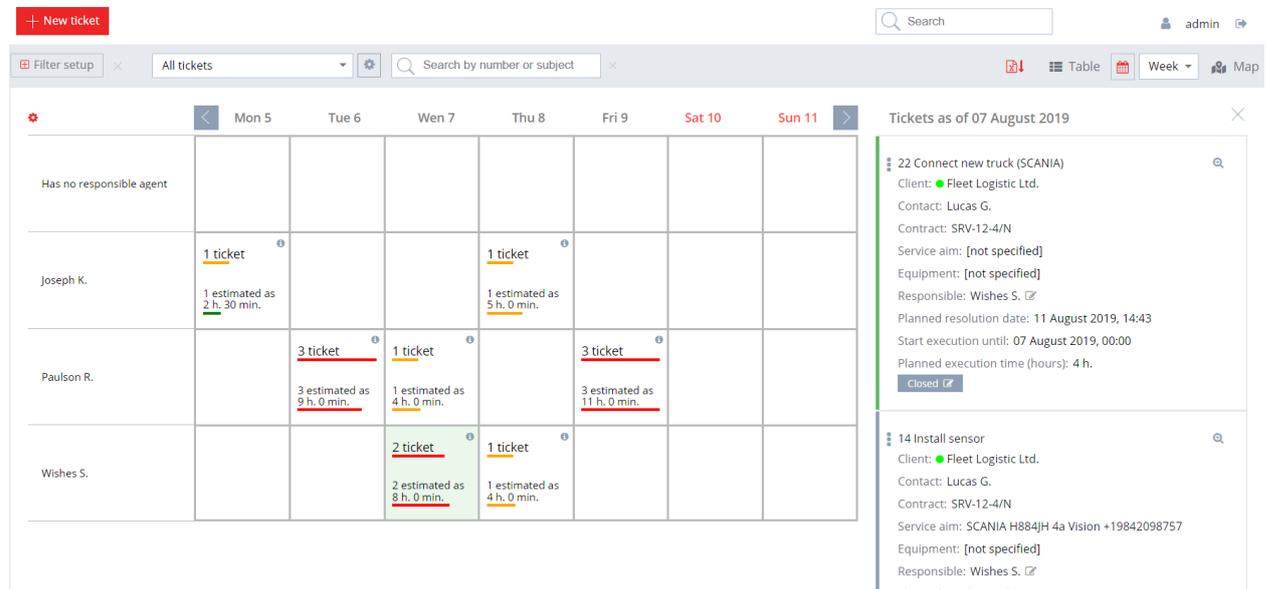
The screenshot displays the Okdesk workload planning calendar interface. At the top, there is a search bar and a user profile icon for 'admin'. Below the search bar, there are filters for 'All tickets' and a search option 'Search by number or subject'. The main area is a calendar grid for the month of July 2019, showing days from Monday to Sunday. The number of tickets for each day is displayed, with the most tickets highlighted in red and the fewest in green. A tooltip is visible over the 25th, showing ticket details for 'Sensor data is not sent to the server'.

Mon	Tue	Wen	Thu	Fri	Sat	Sun
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18 1 ticket 1 estimated as 3 h, 24 min.	19	20	
22	23 2 ticket 0 estimated as 0 h, 0 min.	24 2 ticket 1 estimated as 1 h, 0 min.	25 3 ticket 2 estimated as 5 h, 30 min.	26 3 ticket 2 estimated as 2 h, 30 min.	27	
29	30	31 1 ticket 0 estimated as 0 h, 0 min.	01 1 ticket 0 estimated as 0 h, 0 min.	02	03	

8 URGENT!!! Fuel theft was probably detec...  
Client: Agro Alliance  
Contact: Spielberg S.  
Contract: SRV-12-3/N  
Service aim: John DERR 989 A11 +87789123791  
Equipment: [not specified]

9 Sensor data is not sent to the server  
Client: Fleet Logistic Ltd.  
Contact: [not specified]  
Contract: SRV-12-4/N  
Service aim: SCANIA H884JH 4a Vision +19842098757  
Equipment: Sensor INV Fuel consumption sensor  
Responsible: Service Desk \ Paulson R.  
Planned resolution date: 25 July 2019, 15:07  
Start execution until: 25 July 2019, 00:00  
Planned execution time (hours): [not specified]

The weekly planning mode shows workload by tickets by responsible agents for each day of the week. Thus, the operator can see the workload not only by days, but also by agents. This means that they can quickly redistribute the tickets between the agents to ensure a more balanced load:



For more information about the agent workload calendar, please, watch this video:

In the next, and final, lesson, we will briefly discuss other Okdesk features, including analytical reports on the operation of the maintenance service and integration.

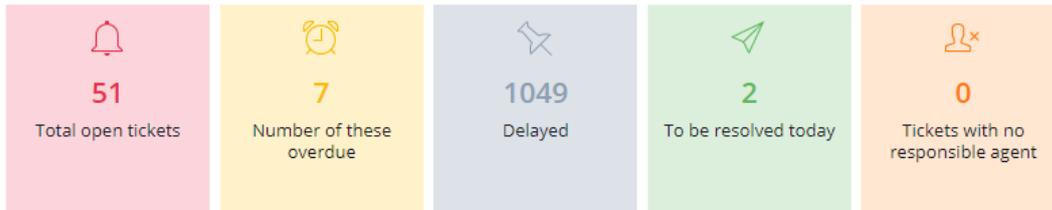
*Lesson 10 of 10*

# Final Lesson. More Capabilities!

2-minute lesson

No business process automation system can be fully useful unless it helps the manager make decisions. This requires reports on key performance metrics. Okdesk, as a specialized Helpdesk system for service businesses, offers a wide range of reports on service metrics. For example, you can view an operational snapshot of the current state:

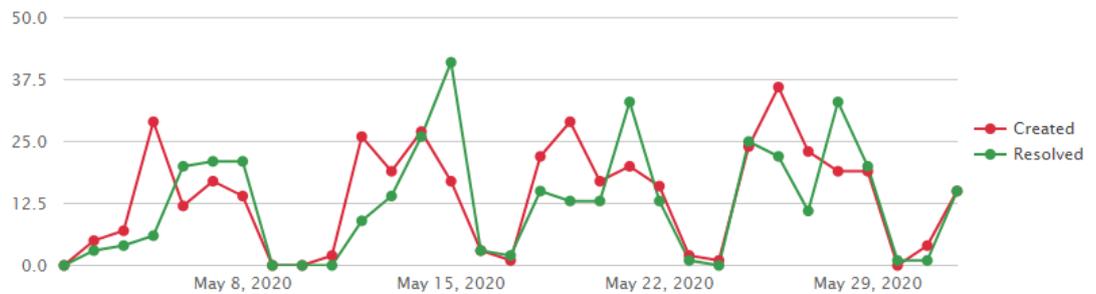
## Real time info



## Registered and resolved tickets over time

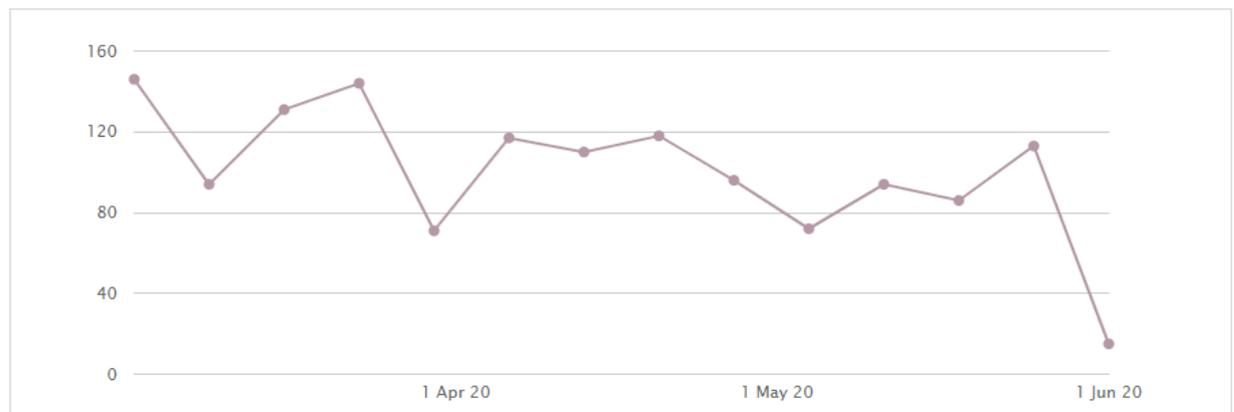
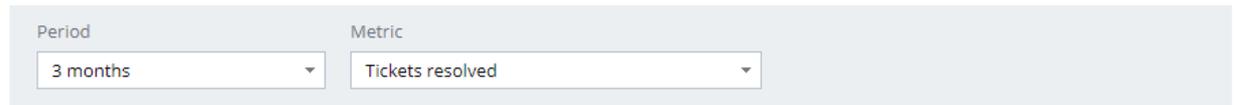
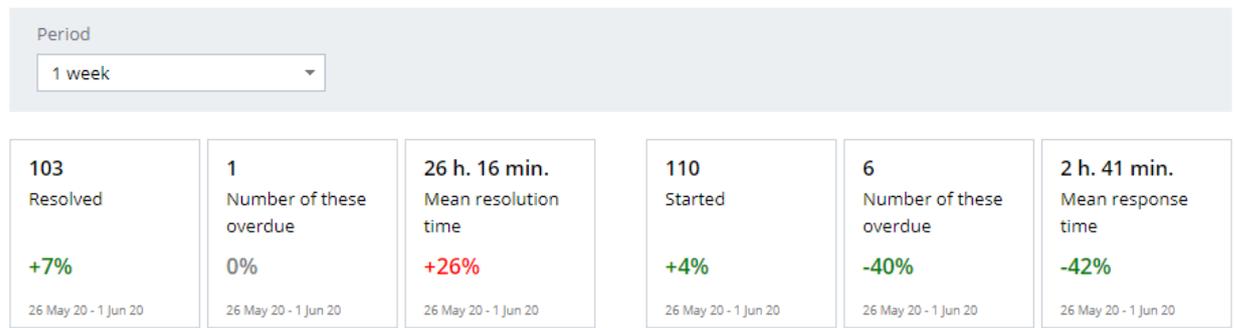
Company:  × Ticket types:  × Priority:  ×

Client category:  × From:  To:



You can analyze the quality of client service metrics in different dimensions:

## Performance levels (SLA)



We have not forgotten about financial reports either. Accounting for labor costs, agent performance, revenue from paid work performed for the client — all these and many other metrics are available to the manager ‘in a few clicks’:

Output by responsible agent

Responsible: Not specified × Resolved during the period: × — ×

Status: Selected (2) × Price list section: Selected (3) ×  Price list breakdown

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Agent	Work/service type	Quantity	Price (aggregated)	Including VAT (aggregated)
Paulson Robert	Sensor diagnostic (without a visit)	1	100	0
	Sensor installation (without a visit)	4	400	0
	Service engineer visit (not warranty)	1	75	0
	Studying to work in Wialon (Base level)	1	250	0
	<b>Total:</b>	<b>7</b>	<b>825</b>	<b>0</b>
Wishes Sid	Sensor diagnostic (without a visit)	1	100	0
	Sensor installation (without a visit)	4	400	0
	Service engineer visit (not warranty)	1	75	0

And, of course, we have thought of integrations. Any information system performs its own range of tasks. But many business processes intersect, and at the intersection points, there is a need for data exchange between the information systems. For this purpose, Okdesk implements an API, a special interface that allows you to connect Okdesk with other systems.

In addition, we have implemented 'out-of-the-box' integrations with more than 30 IP telephony systems, integration with Teamviewer (remote support system that operates via remote desktop access); developed connectors to 3 popular SMS gateways for sending text messages in case of ticket events; created a connector (bot) for Telegram so that clients could submit tickets via their favorite messenger, and much more!

But Okdesk does not stay in one place. We continue active development of the system, adding new features on a weekly basis. And we will continue developing Okdesk as a specialized system for service companies. This means that by choosing Okdesk for your service business, you can be sure that you are on the right track! :)

Join us!