

# swDesk

## Online Support System

Customer Relationship Management Software  
Features Overview

Edition 2.1.3 (English)

## Introduction

This document details the functionality and features of the swDesk Online Support System version 2.1. If you require any assistance or would like a sales representative to contact you, please visit [www.swdesk.com/contact](http://www.swdesk.com/contact).

## Tickets Submission

swDesk provides two submission methods to ensure that ticket submission is convenient for your customers:

- **Web Based Ticket Submission**

Using the client area in swDesk, your customers may easily and quickly submit tickets with or without registering (configurable).

- **Direct Email Submission**

Customers may submit tickets via a regular email. The email will be converted to a ticket, assigned to specific department, given a tracking number, and the customer will receive a confirmation email (configurable). For further convenience, and depending upon your admin settings, the customer may also reply to this ticket via email only, rather than logging into the web-interface.

## swDesk Areas

<b>Clients Area</b>	<b>Technicians Area</b>	<b>Administrator Area</b>
The web based area where your customers submit and track tickets, browse the Knowledge Base and use the other client features of swDesk.	Secure area designed for your company's support technicians. This is where your staff members login and respond to customer requests and utilize other help desk and productivity tools available.	For the site administrator to configure the system and assign permissions to staff members. The administration also has the same functionality as the technicians area.

## Technician Features

### Ticket Management

swDesk provides advanced tickets management features to increase your staff's productivity. Staff members have ability to lock and unlock tickets, which prevents staff members from duplicating responses. Technicians may also create new tickets to accommodate for telephone requests and other forms of contact not processed via swDesk.

Technicians may assign ticket ownership to themselves or others, moves tickets to different departments and may add private comments to tickets, which are only visible only to other staff members.

### Tasks Management

Technicians have access to the swDesk Tasks Tool. This organizational tool helps your staff with time management and tasks management. This feature also includes the ability to add repeating tasks, add reminders and assign task execution to one or more staff members.

### Knowledge Base Management

Technicians have ability to add, remove, edit and organize categories and articles in the Knowledge Base. swDesk supports unlimited category levels, unlimited sub category levels and an unlimited number of articles and categories. The technician's interface also includes the ability to track and review user feedback and ratings posted in the client area.

## Knowledge Base

This powerful swDesk component provides a self-service option for your customers to acquire immediate service. Customers may browse articles by department or search via keywords. This informational database can store support articles and answers to frequently asked questions. It is easy for your staff to manage and simple for your customers to use.

## Multi-Level Categorization

Technicians and administrators may create an unlimited number of categories and sub categories, creating a nested category structure for better organization of articles. Also, swDesk provides the ability to create an unlimited number of links between related categories and articles. There are no limitations on an article's length, and they may contain text or HTML code.

## Users Feedback and Ratings

Customers may leave feedback and submit ratings on articles to inform you how useful the article is in resolving their issue. Staff members or administrators may review these comments and ratings in the staff area.

## Administrative Tools

### Categories (Departments) Management

This tool allows the administrator to create an unlimited number of categories (departments). Options include personal email settings and permission settings. Permissions allow the administrator to control a technician access to the categories, so that they will be able to access only selected categories.

### Technicians Management

The administrator may create an unlimited number of technicians and configure their access levels to all swDesk modules, as well as grant or deny access to individual categories. The administrator may create account expiration dates for technicians and also has the ability to block / suspend any technician.

### Ban Email Addresses

swDesk allows the administrator to ban a user's email address so that the user will not be able to submit new tickets. This is useful to prevent robot submissions, spam, etc.

### Escalations

swDesk can automatically escalate tickets to assigned staff members after a ticket has gone unanswered for a predetermined amount of time. This feature reduces the chance of tickets being overlooked or ignored. The administrator has the ability to configure this tool by setting the number of days since a ticket has been opened or since a technician has replied to it.

swDesk also has the ability to close open tickets that are waiting on customer's response for a XX days (configurable parameter). This is useful if the user has not replied because they found the solution manually or just did not close the ticket.

## User Features

The swDesk Online Support System offers many features to assist your customer. Many of these features are customizable to help you cater to your customer base as effectively as possible. It has been designed to provide your customers an easy to use and elegant user interface, which allows them to conveniently submit their support requests, perform self service using the Knowledge Base and track support progress.

The front page of the client's area contains links to submit new requests, track requests using their email address and ticket ID, search or browse the Knowledge Base or register and log into an account. In addition, registered users can view a list of their most recent ticket submissions, manage their Knowledge Base subscriptions and track their ticket's status.

## Additional Features

swDesk has a number of additional features designed to improve the quality of your company's customer service. One of the most powerful additional swDesk features is the Canned Responses Tool. This is a list of pre-defined response templates conveniently organized into categories, which technicians may use while responding to tickets. Using this tool ensures a more professional answer, decreases response times and improves overall accuracy.