swDesk

Online Support System

Customer Relationship Management Software
Technician Manual

Edition 2.1.5 (English)

Contents

Introduction

The swDesk Online Support System is an innovative customer relationship management (CRM) software solution that utilizes Help Desk Software designed to help manage customer requests with greater efficiency and accuracy. swDesk is an advanced application with a wide range of features. This manual provides documentation of the many features available in the swDesk technician area.

1. Getting Started

After logging into swDesk, you are redirected to the technicians start page[1]. This page displays your most recent tickets and tasks. To view a ticket or a task, simply select it and click the ‘Go’ button.

> **Note:**
> Before your initial login, your account will need to be created by the administrator. If you do not know your username or password, contact your swDesk administrator.

The technicians start page displays unanswered tickets, which typically require an immediate response. Answered tickets with a status level of open are not displayed on the technicians start page.

You may return to the technician start page at any time by clicking the ‘Control Panel Home’ button on the top navigation bar.

[1] Your control panel homepage is set to the technicians start page by default. However, the swDesk administrator may assign a different internal page as your start page.

2. Tickets Management

To view the main Tickets Management module, select ‘Tickets Management’ from the top navigation bar and then select ‘Tickets’. All tickets available to your technician account are displayed here. Ticket sorting and filtering options are available.

Sorting and Viewing Tickets

The tickets management module contains several options to simplify ticket management. Clicking the column headers will sort the tickets by the column field. Click the column header to sort in ascending order, or click it again to sort in descending order. The ticket filter options are located directly above the tickets list. After setting the filter options, you must click the 'Apply Filter Options' button to view the tickets based on your chosen criteria. Details for each tickets filter option are described below:

View

This option enables you to view 'Online Tickets', 'Offline Tickets', or both. 'Online Tickets' are tickets submitted via email or the web interface. 'Offline Tickets' are tickets submitted via technicians to accommodate for support requests that originate via telephone, postal or other offline methods.

Status

This option enables you to choose which tickets to view based on their status. By default, this option is set to display tickets with a status of 'Waiting for tech reply'. This ensures that you will immediately view tickets requiring a reply. If you set this option to 'Opened', all opened tickets, regardless of whether they require a response or not will be displayed. Select 'Closed' to view tickets that have been closed either by technicians or by clients.

Department

This field displays the list of departments that your technician account has access to view. Selecting a department here allows you to view only tickets within that particular department.

User (ID/Email/Name)

With this option, you may view tickets belonging only to a specific user or users. To do this you must enter user's personal ID number, name or email address.

Owner

By setting this option, you may select to view only un-owned tickets, tickets owned by you or tickets owned by all other technicians.

Searching for Tickets

To quickly search all tickets for a particular ticket or a set of tickets, you may use the search option that is always displayed on the left navigation bar when working with the tickets. You may search by: ticket number, subject or one or more keywords from the description. Once entered, click the ‘Find’ button.

Working with Tickets

While working in the main tickets module, you may view the details for a particular ticket by clicking the ticket ID, the ticket subject or on the ‘View’ link. To answer a ticket, enter your response in the message field and click the ‘Reply’ button. If you prefer to answer and close the ticket with one action, check the option labeled ‘Answer and close ticket’. After submitting your response, your message will be added to the ticket, in chronological order with other replies, if any. The client will then receive the response notification via email.

Private Messages

Private messages are designed to improve communication and collaboration between staff members regarding specific support requests. To add a private message, enter your message, check the option labeled ‘Private message only’ and click the ‘Reply’ button. Private messages are visible only by technicians and administrators. Private message will not be sent to the client via email or be visible in the client area of swDesk.

Locking a Ticket

Tickets may be locked to prevent other technicians from answering the same ticket that you are currently viewing. This feature prevents duplicate responses from multiple technicians. If several technicians are working with tickets, it is recommended that you lock a ticket before answering it. After you lock a ticket, only you will have the ability to answer the ticket. Other technicians may only view the ticket and submit private messages. The ticket will unlock automatically once you submit your response.

Closing a Ticket

When a support request is resolved, you may close the ticket by clicking the ‘Close Ticket’ button in the main tickets module or by checking the option labeled ‘Answer and close ticket’ while answering the ticket. Note that you will not be able to close the ticket if it is locked by another technician.

Transferring Tickets

This function is useful if you determine that a client submitted the ticket to an incorrect department. To transfer the ticket to another department, select the new department from the ‘Transfer To’ dropdown list, enter a reason for transferring in the ‘Reason’ field and click the ‘Transfer’ button.

Response Templates Tool

The Response Templates Tool is a list of pre-defined response templates conveniently organized into categories, which technicians may use while responding to tickets. This tool helps to ensure a more professional answer, decreases response times, and improves overall accuracy.

The administrator configures which template categories are available to each technician. Each response is to be used as a template to answer frequently asked questions. To use this tool, select ‘Tickets Management’ from the top navigation bar and then select ‘Response Templates’. Then click the link labeled ‘Launch Response Templates’ on the left navigation bar. The list of the templates with answers will open in a new window. To view the templates, click on the template title on the left side.

Manual Ticket Entry

In addition to the web interface and email ticket submission methods, you may also submit tickets manually. This function is useful if your company receives offline support requests such as telephone or postal inquires. To add a new ticket, click on the 'Start a Ticket' link on the left navigation bar. The required fields to submit a ticket are described below:

General information

Department

Select the most appropriate department for the ticket.

Subject

Enter a short description of the support request.

Ticket Details

Enter a detailed description of the support request.

User Account Information

You may enter information to create a new user, or you may assign the ticket to an existing user. If you prefer to create new user account, choose the option 'I want to create a new user' and fill in the user's information. To link it to an existing user, choose the option 'I want to link this ticket to an existing user' and enter user's unique identifier (ID) or email address. To check the entry accuracy, click the 'Verify User' button.

3. Planning and Organization

As a technician, you have access to the swDesk Tasks Management Tool. To open the Tasks Management Tool, select 'Planning & Organizing' from the top navigation bar and then select 'Tasks'.

Add a Task

To add a new task, click on the link ‘Add a Task’ on the left navigation bar. For quick task entry, you may enter only three fields: subject, complete by date and details. Additional options available for each task are described below:

Priority and Status

In this area you may set priority, status and also the percentage of progress completed.

Email Reminders

For important tasks, you may set an email reminder. To do this, open the area labeled ‘Email Reminders’, enable the reminder and choose the number of days before the complete by date to send the reminder.

> **Note**
> This function is only available when enabled by the administrator. If it is not available to you, consult your swDesk administrator.

Assigned Technicians

If a task requires teamwork to complete it, you may assign the necessary technicians to the task. To do this, open the area ‘Assigned Technicians’ and choose the technicians responsible for the completing the task. You may set the task completion criteria to one of the following: – «The task is solved when all the users solved the task» or «The task is solved when at least one user solved the task».

Repeat Task Options

For setting the repeat tasks option, open the area ‘Repeat Options’, and set the period and repetition of the task.

4. Content Management

A technician may be responsible for adding news articles to be published in the client area of swDesk. This could be used for company news or for events relevant to the company's support department. For news editing, select 'Content Management' from the top navigation bar and then select 'News'. To add a news entry, click on the link 'Add News Entry' on the left navigation bar.

5. Knowledge Base Management

The swDesk Knowledge Base feature provides a self-service option for clients to acquire immediate service. Clients may browse articles by category or search via keywords. This informational database can store support articles and answers to frequently asked questions.

Technicians have the ability to add, remove, edit and organize categories and articles in the Knowledge Base. The technician's interface also includes the ability to track and review user feedback and ratings posted in the client area.

To view/add/edit articles select 'Knowledge Base' from the top navigation bar and then select 'Articles'. To view/add/edit categories select 'Knowledge Base' from the top navigation bar and then select 'Categories'.

5.1. Adding an Article

To add a new article, click on the link 'Add an Article' on the left navigation bar. Details of each article option are described below:

Category

Article location.

Article Title

Short title for the article.

Approved

If the option status is 'No', this article will not be displayed in the client area of swDesk. This option is useful if your company requires site content to be approved by an editor before being published. Once the article is ready for publishing, set the 'Approved' status to 'Yes'.

Question

Frequently asked question.

Answer

Answer to the frequently asked question.

Keywords

Keywords that users can search to locate this solution. The keywords must be separated by commas. For example: html, table.

Upload Attachment

You may also attach a file to the article. Clients are able to access this file in the client area of swDesk.

Related Articles

You may assign a list of the related articles. This list will be displayed when viewing the article in the client area of swDesk.

Article Validation

This tool is designed for the site editor to review Knowledge Base articles that are waiting to be validated and determine if they should be published or not. This list will include articles created by technicians that are waiting to be validated by the site editor. To open the list of un-reviewed articles, click on the 'Validate Articles' link on the left navigation bar.