Getting started with Desk.com
Wouldn’t it be great if you could deploy a solution to let your agents manage all support inquiries in one place? And get to know your customers better at the same time?

Good news: You can.

Shipping issues. Customer complaints. Simple questions. Customer service can be so overwhelming — and as a small business, you have so many other things you need to focus on.

Desk.com is the all-in-one customer support app designed specifically to help fast-growing businesses respond to customer inquiries across multiple channels and offer online self-service support. Desk.com helps you jumpstart your customer service so you can:

- Help customers faster: Use out-of-the-box productivity tools to let agents collaborate and manage cases in record time.
- Make better decisions: Bring all your data together and get the insights you need to make faster, smarter decisions.
- Help customers help themselves: Share your knowledge on a self-service site so your customers can find their own answers.
- Scale as you grow: Integrate with the systems that power your business, then easily upgrade to Service Cloud when you need more capabilities and customization.

Read on to see how easy it is to for agents to make every customer experience exceptional with Desk.com.
The Desk.com agent console

When your agents use Desk.com, they can easily view and access cases from every channel, all in one place. They can also access your knowledge base or create new cases in just seconds.
Agent Settings Menu
Access a variety of helpful tools for agents

• Get Help: Desk.com’s support portal. Find the answers to commonly asked questions or find our contact information
• Keyboard Shortcuts: Helpful shortcuts to increase efficiency
• Settings: Adjust signature, sounds, and more
• Language: Change the native language for the Desk.com console

Quick Search
Perform a quick search by typing in a keyword, customer name, case ID, and more

Working Cases
Click to quickly access cases you are working on

New Case Creation
Click to quickly create a new case

Case Tab
Inbox where agents can view, select, and update cases

Side Menu
Click to toggle between the Classic Agent, Admin, Next Gen Agent, and Business Insights

• Next Gen Agent: Next generation of the agent console
• Classic Agent: Standard agent console used to work on support tickets
• Admin: Admin console used to configure settings and automate workflows
• Business Insights: Reporting tool
• Knowledge Base: Menu for viewing knowledge articles

Top navigation bar
Agents use Desk.com’s top navigation bar to quickly toggle between admin and agent consoles, view system updates, or access settings so they can get to what they need in seconds.
Inside Desk.com’s case tab, agents can see which cases have been assigned to them, check statuses, and quickly get case contexts. They can also use the “bulk update” feature to help several customers at once.

### Filters
Dynamically pull in cases that correspond to a certain criteria defined in the filter.

**Common filters:**
- **Inbox:** Shows cases that are not resolved
- **My Cases:** Shows cases that are assigned to you with any case status
- **All Cases:** All cases that are in the system

Filters do not store cases permanently and are different from folders. You can always ask your administrator to change a filter or create a new one.

### Select Multiple Cases
Use this to select all or no cases. When all or multiple cases are selected, the bulk update function is enabled.

### Header Selection
Use this menu to select which headers you’d like to see in the case tab.
You can re-organize headers by dragging and dropping.

### Case Status
See whether a case is New, Open, Pending, or Resolved. See Case Lifecycle and Status section for more information.

### Case Labels
Use cues to get more context and information about a case. Some companies allow agents to create labels. Check with your administrator to see how labels are created within your organization.
Topics
Each knowledgeable article belongs to a corresponding topic.
Public topics contain articles that can be viewed by or shared with customers.
Private topics are viewable only by internal agents. Articles in a private topic are identified by a label. Private articles are helpful for internal processes. For example, how to process a refund for a customer, things to remember before resolving a ticket, etc.

Knowledge tab
Agents use Desk.com’s knowledge tab to quickly access public, private, and internal knowledge articles. The information they need is always at their fingertips, so they can help customers faster than ever.

Article Search
Search single or multiple fields.

Filter
Select filters for the types of articles you’d like to view.

Article View
Click on an article to view full content.

Hyperlink and Copy Text
Click to copy link or text to clipboard.
When agents use Desk.com’s search tab, it’s easy to find information by case, customer, company, or even keyword. And they can quickly perform a bulk update when they need to make a bunch of changes at once.

**Performing Searches**
Searches can be performed on a number of parameters including case, customer, or company information. Additionally, you can search keywords that include labels, custom fields, and case ID.

**Search Results**
Open, view, or delete cases directly within search results. Select multiple cases to use bulk update or export cases.

**Saved Searches**
Provides quick access to saved searches. To save a search, enter the search parameters and click “Save Search” in the top right corner.

**Advanced Search**
Use advanced search to find cases based on labels, custom fields, case status, agent, and more.

**Search Toggle**
Click for a dropdown to search by case, customer, or company.
New case creation

Cases are automatically created in Desk.com for inquiries through email, Facebook, Twitter, and web forms. When an agent takes a phone call from a customer, he or she can create a new case in three easy steps.

1. **Click on Case Creation Button**
   Click and active channels will appear in the list.

2. **Select Channel**
   Choose one of the available channels in the list that appears.

3. **Search and Select Customer**
   Select existing customer or click “Add new customer”.
   Then click on “Create Case”.

New case creation is generally helpful for phone cases.

The majority of cases will be automatically created through email, Facebook, Twitter, etc.
Case lifecycle and status

When agents are working in Desk.com, they’ll see cases marked with one of these four statuses which flow from new to resolved.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Status of a new support ticket that has not been opened by an agent</td>
</tr>
<tr>
<td></td>
<td>A ticket cannot be set to new once it has been opened</td>
</tr>
<tr>
<td>Open</td>
<td>A case is open when the ticket has been opened or updated but a response has not been sent</td>
</tr>
<tr>
<td></td>
<td>Generally if a case is open, the agent or company needs to follow-up on the case</td>
</tr>
<tr>
<td>Pending</td>
<td>A case is set to pending when a response has been sent to a customer</td>
</tr>
<tr>
<td></td>
<td>Generally, pending means that the customer needs to respond or provide additional information</td>
</tr>
<tr>
<td>Resolved</td>
<td>A case is resolved when you believe that you have answered the question of the customer in full and no further action from either end is required</td>
</tr>
</tbody>
</table>

If a customer responds to a resolved case, it will re-open the case.

Closed and Deleted Case Status

There are two additional case statuses – closed and deleted.

Closed cases cannot be edited or updated and cases can only be closed using a time rule—they cannot be closed manually. We recommend that customers do not activate the rule that closes cases and to have “Resolved” be the endpoint.

Cases that have been deleted show “Deleted” as the status. Depending on the admin, agents may or may not have the ability to delete cases.

Sample Email Case Flow

1. Customer emails in a new case, case appears in the Inbox
2. Agent opens case and updates case information
3. Agent sends response to customer
4. Customer responds, case appears in the Inbox
5. Agent responds and provides all necessary information and sets case to resolve.
Responding to or Updating a Case

Update the case related information and/or enter a response in the Reply Area. Then click Update Case button. If you've answered all of the customers question, click Update, Send, & Resolve.

Customer and Company Information
Click fields to update information. Scroll down to view/update company information.

Open Case Tabs
Quickly access active cases if the “Close Tab” box is unchecked (see #9). Close as needed.

Case Forward
Click to enter email address of recipient. Note that case notes will also be sent.

Case Related Information
Update relevant information about the case, customer, or company. You can assign cases to another agent or group, edit customer information, and more.

If your company uses custom fields, make sure to fill them out.

*See next slide for more information on Case Related Information.

Add Note
Add notes to the case that are visible only by other agents in Desk.com.

Reply and Note Area
Type your response or note here.

Macros
Use a macro to apply a canned response or perform an automated task.

Outbound Email
Click to manually change the outbound email used.

Close Tab
Check to close tab when case is updated. Uncheck to leave case open in tabs when case is updated.

Update, Send, and Resolve
When you're ready to send a response or update the info on a case, click on the corresponding button.

Working a case

Your agents will spend most of their time working cases in Desk.com. It's easy to find case-related information, and they can add notes and forward cases as needed. Macros let them apply a pre-configured response and automated tasks.

*See next slide for more information on Case Related Information.
Case fields

Desk.com captures standard case information but also lets agents capture custom information. Agents can view attachments and a timeline of all case-related activities. It’s that easy.

1. Standard Case Fields
   Depending on the workflow of your team, you can directly update standard case fields. In many cases, updating is automated. Check with your admin to see what the best practices are for your team.

2. Custom Case Fields
   Custom fields collect information specific for your company and can be created for a case, customer, or company. They are created by your admin and are often used to run reports.
   - Custom fields can be text, number, list, date, and true/false.
   - If your company uses custom fields, make sure to fill them out.

3. Attachments
   View all attachments within the case.

4. Case Timeline
   View all events that have occurred related to a case. This can include who’s opened or viewed the case, rules that have been triggered on the case, and more.
Start with a free trial and take Desk.com for a test drive today. It's easy to get up and running on your own — but if you need help, we'll be there for you.

TRY DESK.COM FOR FREE

Follow Desk.com and stay up-to-date on customer service solutions for fast-growing companies.