

helpdeskpilot

Simplify your
help desk

Overview

- Web based help desk management is a pivotal aid to any business
- The ability to audit every conversation
- Efficient management of requests submitted via
 - Email, Web or over the phone

Use-cases

- Customer Service
 - Managing pre-sales and general enquiries, submitted via email or web
- Technical Support
 - Managing support requests from an international customer base

Use-cases

- Internal Request Tracking
 - Auditing and tracking email conversations within a business
- Software Bug Tracking
 - Managing bug reports, tracking development and fixes

Use-cases

- Online Knowledge Base
 - Self-help reference for customers, linked to ticketing system in case actual support is required
- IT Help Desk
 - Manage IT support requests from employees within the organization

Use-cases

- Ticketing System
 - Converting end user requests to identifiable tickets
 - Travel Agent bookings
 - Admin/Finance/Payroll request management
 - Warranty/Complaint Registration

Request submission

A help desk within easy reach

End Users can send requests via email, using their mail clients

Need help with installation

Send Chat Attach Address Fonts Colors Save As Draft Photo Browser Show Stationery

To: support@acmewidgetco.com

Cc:

Bcc:

Reply To:

Subject: Need help with installation

Gmail - Compose Mail - victorbaker10@gmail.com

Send Save Now Discard Draft autosaved at 3:17 PM (13 minutes ago)

To: feedback@acmewidgetco.com

Add Cc | Add Bcc

Subject: Great customer service

Attach a file

« Plain Text

Hi Guys!

I just wanted to let you know that I'm impressed with

Your support team is top-notch. Keep up the good work

Cheers
Victor

Untitled - Message (HTML)

Message Insert Options Format Text

Paste

Clipboard

Basic Text

Address Book Check Names Include Options Proofing

To... enquiries@acmewidgetco.com

Cc...

Subject: Pre-sales questions

Hello,

I am interested in purchasing your software solution and have a few questions.

Could someone from your sales team please call me on 123 456 7890 as soon as possible?

Thank you.

Jim Black

Contact Customer Care

Use this form to submit your support request to our Customer Care Dept.

Full Name

Email Address

Category

Subject

Attach a File

Message

Create Ticket Reset

customer support software by Helpdesk Pilot



Embeddable request submission form on your website

Login to your account

Login to track your existing support requests. If you haven't created a ticket yet then you would need to [register](#) or [create a new ticket](#) to begin

Email Address

Password

[Forgot password?](#)☒ Remember me

Login

Browse KnowledgeBase

Helpdesk Pilot Knowledge Base ▾

Most Viewed Articles

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Self-service end user interface

Helpdesk Pilot - View Tickets

ACME Widget Company

New Ticket My Settings Jack Smith Logout

Dashboard Tickets Manage Contacts Reports Knowledge Base

My Queue Pending All New Open On Hold Solved

Tickets showing 1 - 6 of 6

Search Tickets SEARCH

-- Actions -- --Sort by-- All Categories 1 - 6

| | | | | | | | |
|--------------------------|------------------|---|----------------------------------|---------------------|-----------------|-----------------------|-------------------|
| <input type="checkbox"/> | #HDPSUPP00000066 | Excellent Service (3) | last updated 06-jun-2011 | | | | |
| <input type="checkbox"/> | SOLVED | Hey there, I just wanted to let you know that the Customer Service has been top-notch. You guys roc | | | | | |
| | | | assigned to ~ | raised by John Doe | priority Normal | category Support Dept | due date: Not Set |
| <input type="checkbox"/> | #HDPSUPP00000068 | Renewing my maintenance contract (1) | last updated 28-mar-2011 | | | | |
| <input type="checkbox"/> | NEW | Hi guys, I just realized that my contract comes up for renewal in a weeks time. Could you let me kn | | | | | |
| | | | assigned to joesmith | raised by John Doe | priority Low | category Support Dept | due date: Not Set |
| <input type="checkbox"/> | #HDPSUPP00000048 | Interested in a demo (2) | last updated 25-feb-2011 [1 new] | | | | |
| <input type="checkbox"/> | SOLVED | Hello there, I am interested in purchasing your product but would prefer to have a demo first. Coul | | | | | |
| | | | assigned to brian | raised by Jim Black | priority High | category Support Dept | due in: 17 days |

Incoming requests converted into uniquely identifiable tickets

Helpdesk Pilot – Ticket Detail – #HDPSUPP00000194

John Doe
1 second ago



Hello,

I am interested in signing up for your service.

Could you provide me with more details on pricing?

Regards,

John



other recipients
None

attachments
None

Current Status :

NEW

Add Update


Add Private Note

Delete Ticket

Add Update

[Add CC](#) | [Add BCC](#) | [Attach a File](#) | [Edit Subject](#) | [Quote Reply](#)

Choose File

 Pricing.pdf

Remove

Thanks for getting in touch with us John.
I've enclosed a document that covers our pricing structure and will reach out to you shortly, over the phone.
Thanks once again for considering us.
Regards,

Insert link

-- KnowledgeBase Article --

update customer :
Yes

status :
New

priority :
Normal

assigned to :
me (admi

time spent:

set due date :

add new tags :

Update Ticket

Reset

Cancel

Intuitive & User friendly interface assists in achieving rapid turn around time

Flexibility

A help desk customized to your needs

New Role

Add new role by inputting their details

Name

Description

Set Permissions

Managerial Permissions

[Select all](#)

☐ Add & edit staff members

☐ Add & view all contacts

☐ Add & edit notification templates

☐ Add & edit KB sections and articles

☐ Add & edit smart rules

☐ Add & edit categories

☐ Add & edit priorities

☐ Add & edit statuses

☐ Add & edit ticket custom fields

☐ Add & edit client custom fields

☐ Access integrations page

☐ Add & edit canned actions

☐ Add & edit SLAs

☐ Create & access reports

☐ Export reports

Ticket Level Permissions

[Select all](#)

☐ Add reply via email

☐ Add reply via web form

☐ Edit replies

☐ Delete replies

☐ Delete tickets

☐ Mark as completed

☐ Move tickets

☐ Split tickets

☐ Assign tickets

☐ Set due date

☐ Access All Tickets

☐ Add related ticket

☐ Reassign Tickets

☐ Act on closed tickets

☐ Change ticket contact

☐ Create tickets in unassociated categories

☐ Move tickets to unassociated categories

Save Settings

Reset

Cancel

New Staff

Add new staff members. [Click here to add multiple staff users at once.](#)

First Name

Last Name

Email Address

Role

✓ Administrator

Staff

Associate Categories

☐ Feedback

☐ Enquiries

☐ Support Dept

Save Settings

Reset

Cancel

Role-based help desk staff

Statuses

Setup and customize statues here. Add. Delete. Rename. ReOrder.

| Status Color | Status Name | Behavior | Order |
|--------------|-----------------------|-----------|-------|
| NEW | New (current default) | pending | 1 |
| OPEN | Open | pending | 2 |
| ON HOLD | On Hold | pending | 3 |
| SOLVED | Solved | completed | 4 |



Add a new status.

Priorities

Setup and customize priorities here. Add. Delete. Rename. Reorder.

| Priority Name | Order |
|--------------------------|-------|
| Low | 1 |
| Normal (current default) | 2 |
| High | 3 |
| Critical | 4 |



Add a new priority.

Custom statuses & priorities

Helpdesk Pilot – Ticket Detail – #HDPSUPP00000194

ACME Widget Company

New TicketMy SettingsJack Smith Logout

DashboardTicketsManageContactsReportsKnowledge Base

My QueuePendingAllNewOpenOn HoldSolved

« Back to tickets viewJump to last responseDoneNext Ticket »

#HDPSUPP00000194

NEW

←

👤

★

assign admin

Time Spent [add](#)

0 minutes

Request

Hello,

last updated 3 minutes ago

Update InfoResetCancel

Edit Additional Information

Edit custom field values here.

Type of RequestHardware

Hardware TypePC

Contact Information

Company NameABC Enterprises

Support Contract Expiry Date12/08/2011

Phone No1234567

Additional Information

Type of RequestHardware

Hardware TypePC

Messages

John Doe3 minutes ago

Hello,

I am interested in signing up for your service.

Could you provide me with more details on pricing?

[Collapse All](#)

Create custom fields to collect specific information on every submitted request

Business Automation

- Automate ticket actions with the Smart Rules Engine
- Define automated escalation rules
 - Time based
 - L1,L2,L3 support
- Reduce dependency on manual processes

Enhanced productivity

Aimed at benefiting every help desk staff

Helpdesk Pilot – Mass Reply

ACME Widget Company

New TicketMy SettingsJack Smith Logout

DashboardTicketsManageContactsReportsKnowledge Base

My QueuePendingAllNewOpenOn HoldSolved

« Back to tickets view

Confirm Mass Reply

Reply to multiple tickets at once.

☒

Need clarification on pricing

last updated
25-feb-2011

#HDPSUPP00000041

☒

Interested in a demo

last updated
25-feb-2011

#HDPSUPP00000048

☒

Request for Information

last updated
4 minutes ago

#HDPSUPP00000194

[Add CC](#) | [Add BCC](#) | [Attach a File](#) | [Edit Subject](#) | [Quote Reply](#)

Thank you for contacting us.
Our Sales Team will be in touch with you shortly to provide you with necessary clarifications.
Regards,

update customer :
Yes

status :
Open

priority :
Low

assigned to :
me (admin)

time spent:

set due date :

add new tags :




Update TicketResetCancel

Multiple responses with a single reply

#SD00000038 **Great customer service** last updated 20 hours ago

NEW

Hi Guys! I just wanted to let you know that I'm impressed with the level of service you offer. Your




assigned to admin

raised by Victor Baker

priority Normal

category Feedback

due date: Not Set



Thanks a lot!

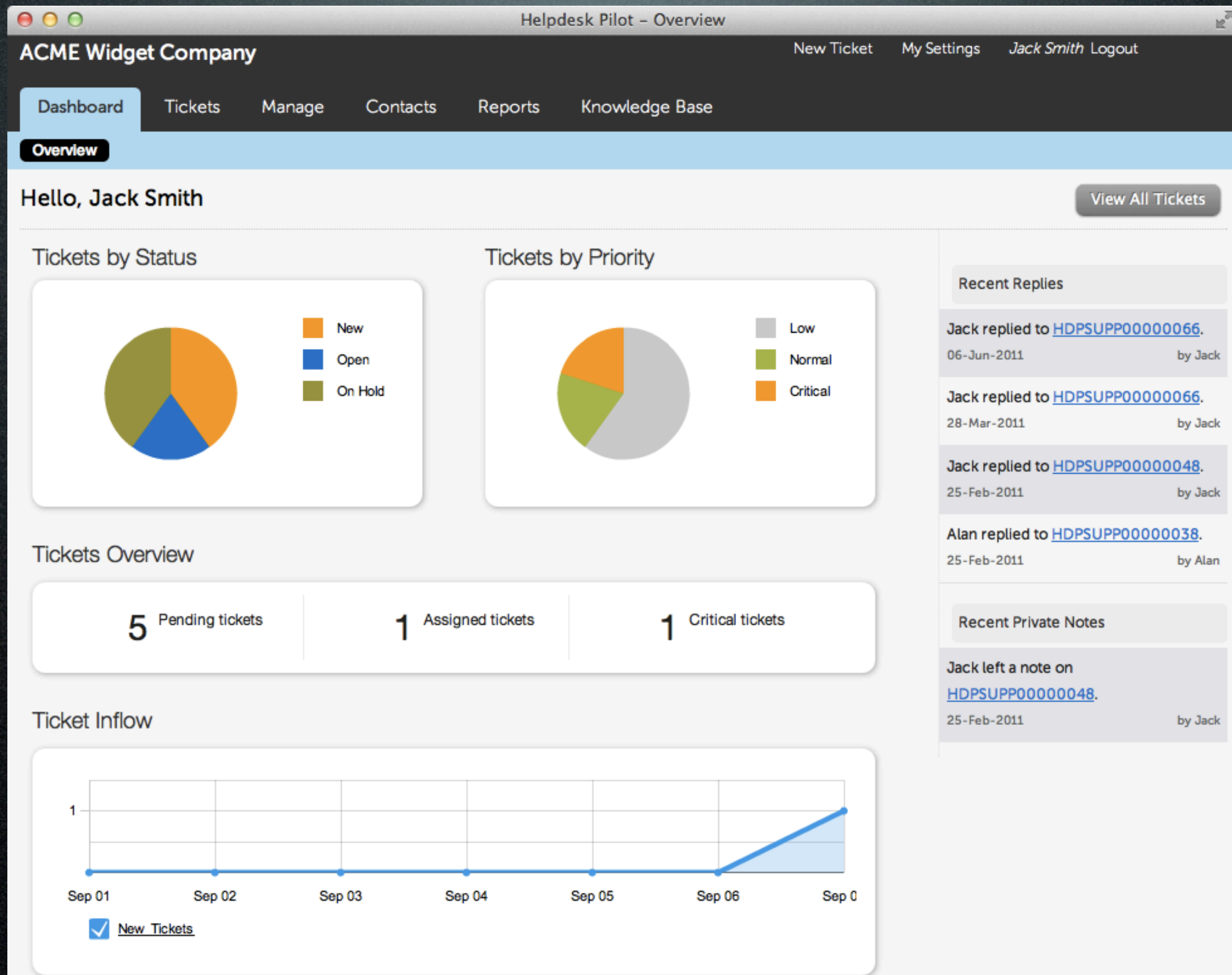
We appreciate the kind words!

Regards,|

Send Reply

Cancel

Rapid responses using Quick Reply



Individual staff dashboard with key statistics

Re: Great Customer Service #SD00000038

Send Reply All Chat Attach Address Fonts Colors Save As Draft Photo Browser

To: support@acmewidgetco.com

Cc:

Bcc:

Reply To:

Subject: Re: Great Customer Service #SD00000038

Signature: None

Hi Victor,

Thanks for the great feedback,

We'll make sure we continue to improve on the level of service we offer!

Regards,

Alan

On 25-Feb-2011, at 10:20 AM, Feedback wrote:

Reply above this line to append to the ticket

Dear Alan Miller,

You have a new ticket/reply waiting for you at <http://support.acmewidgetco.com/staff/ticket/38>

Request Ticket Details:

Hi Guys,

I just wanted to let you know that I'm impressed with the level of service you offer.

Your support team is top-notch. Keep up the good work!

Cheers
Victor
Ticket number : SD00000038
Client Name: Victor Baker
Client's email: victorbaker10@gmail.com
Priority: Medium
[Addressed to Feedback](#)

iPad 12:56 PM 92%

Tenmiles Cancel Re : Great Customer Service #SD00000038 Send

To: support@acmewidgetco.com

Cc/Bcc, From: alan@tenmiles.com

Subject: Re : Great Customer Service #SD00000038

Hi Victor,

Thanks for the great feedback!

Sent from my iPad

On 25-Feb-2011, at 10:20 AM, Feedback wrote:

Dear Alan Miller

Q W E R T Y U I O P

A S D F G H J K L return

↑ Z X C V B N M ! , ? .

.?123 .?123

Reply to end users via email

Messages

Expand All

Jim Black

11 minutes ago

Hello there,

Julia Smith

4 minutes ago

Assigned to **admin**

Julia Smith

3 minutes ago




Hi Jim,

Thank you for contacting us.

We'd be glad to arrange for a demo later this morning. Alan Milller, our Sales Director will get in touch with you shortly to schedule a time for the demo.

Regards,

Updated status to **open**, added time spent on ticket **5 minutes**



other recipients : None

attachments : None

Julia Smith

19 seconds ago

Alan - could you please liaise with Jim Black and schedule a time for the demo?

PRIVATE NOTE

Those new brochures arrived yesterday, so you could make use of the new collateral beginning today.




Thanks!

Changed priority to **high**, changed due date to **2011-02-25**, added time spent on ticket **5 minutes**

Julia Smith

9 seconds ago

Assigned to **alan**



other recipients : None

attachments : None

Internal collaboration through the use of
Private Notes

Helpdesk Pilot - Ticket Detail - #HDPSUPP00000194

John Doe
22 minutes ago

Hello,

Smart Rule
21 minutes ago

Assigned to admin, by the smartrule is new and unresponded for 1 min -> assign to staff #1

Jack Smith
15 minutes ago

Changed priority to critical

Current Status :

NEW

Add Update

Add Private Note

Delete Ticket

Add Update

Add CC | Add BCC | Attach a File | Edit Subject | Quote Reply

Thank you for renewing your maintenance contract.
The update will reflect on your customer account within the next 1 hour. If you need any further clarifications, feel free to get in touch with us!

Apply Canned Action

-- select an action --

Contract Renewal Response

-- KnowledgeBase Article --

Insert link

update customer :
Yes

status :
New

priority :
Normal

assigned to :
me (admi

time spent:

set due date :

add new tags :

Update Ticket

Reset

Cancel

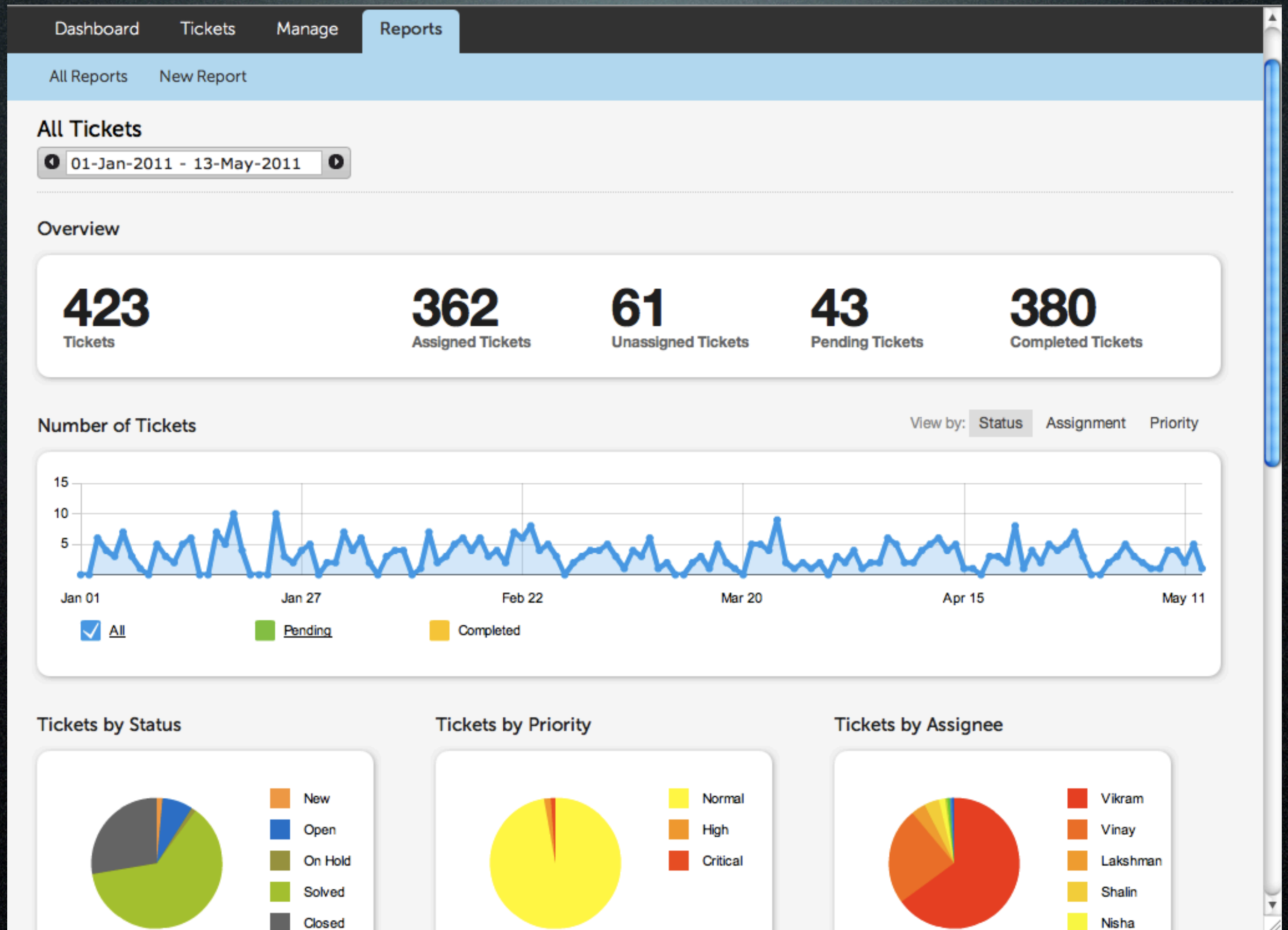
Insert pre-defined response templates and ticket level actions using Canned Actions

Managing Help desk activities

Additional capabilities to aid in the
management of your help desk

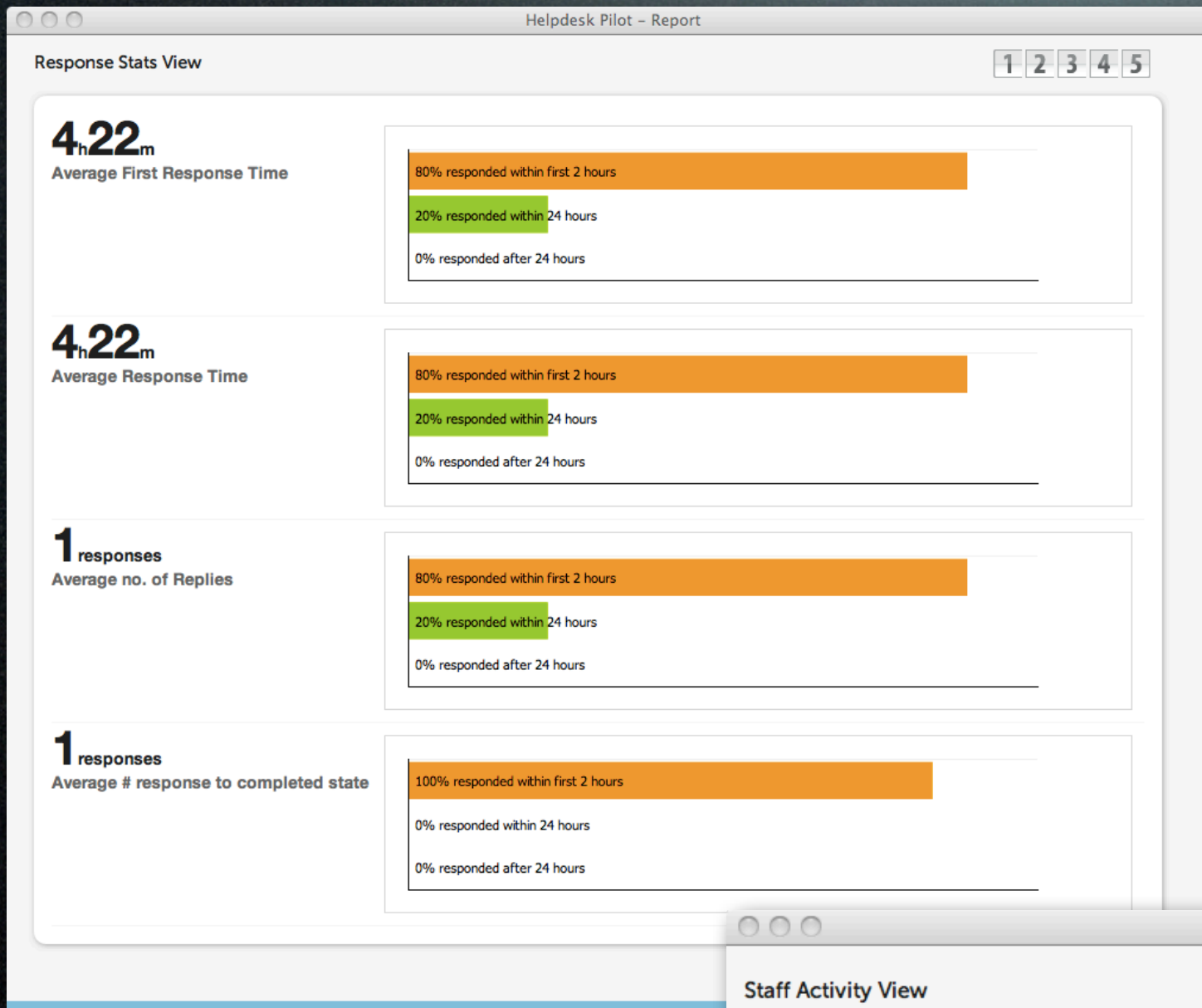
Powerful Reporting

- Insightful Statistics
- Build customized reports on the fly
- Intuitive interface to generate
 - Management reports
 - Incident tracking reports
- Assists decision making



Visual representation of key metrics

Response Statistics



Staff Activity

Helpdesk Pilot - Report

Staff Activity View

1 2 3 4 5

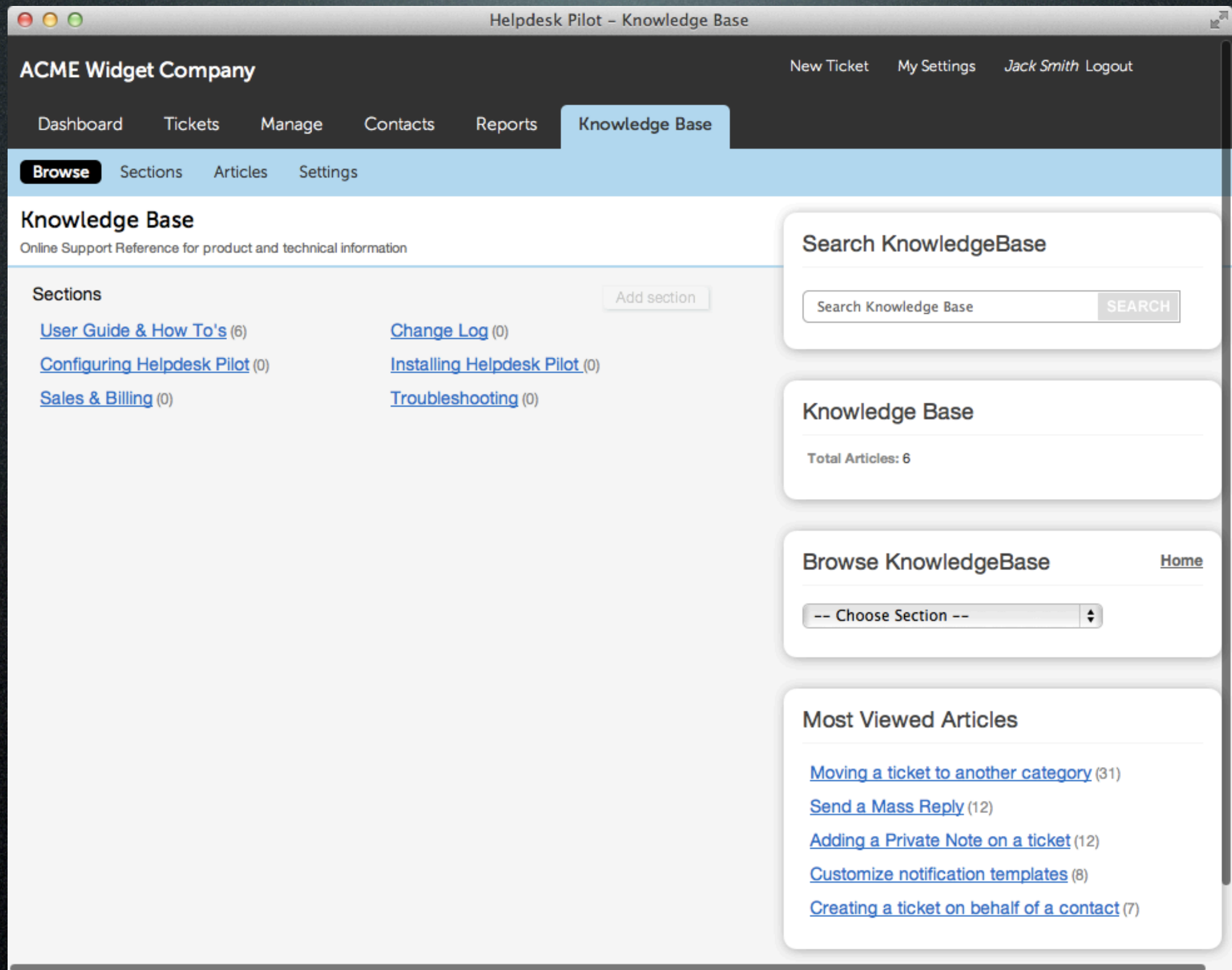
| Staff Name | Assigned | Participated | Pending | Completed | Time Spent | Private Notes | No. of replies |
|---------------|----------|--------------|---------|-----------|------------|---------------|----------------|
| Alan Miller | 1 | 2 | 1 | 0 | 0 | 0 | 2 |
| Julia Smith | 9 | 4 | 7 | 2 | 15 | 2 | 3 |
| Swarna Rethas | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Export: [CSV](#) [Excel](#)

showing 1 - 3 of 3

Knowledge Base

- An Online Reference Medium for your end users to access
- Ideal for Technical Documentation, Support & Troubleshooting Guides, FAQs
- Create articles with rich content
 - HTML, Images, Video
 - Upload files to articles



Intuitive Knowledge Base User Interface

SLA Management*

Manage and report on individual SLAs

* Available on the Enterprise Edition only

Name

Ticket Assignment SLA

Description

Active

Yes

Work Schedule

Default Work Schedule

SLA Objectives

Time taken to change a tick should be less than 1 Minutes

Match **all** of these conditions [Add another condition](#)

Status Is New - +

Match **any** of these conditions [Add another condition](#)

Should meet this SLA condition

100 %

Create SLAs with specific conditions and objectives,
selecting custom work schedules

Name

Initial Work Schedule

Description

Monday to Friday 9AM to 5PM


Time Zone

GMT +00:00

Working Hours

| | | | | |
|-------------------------------------|-----------|---------------------|----|---------------------|
| <input checked="" type="checkbox"/> | Monday | 09 hours 00 minutes | To | 17 hours 00 minutes |
| <input checked="" type="checkbox"/> | Tuesday | 09 hours 00 minutes | To | 17 hours 00 minutes |
| <input checked="" type="checkbox"/> | Wednesday | 09 hours 00 minutes | To | 17 hours 00 minutes |
| <input checked="" type="checkbox"/> | Thursday | 09 hours 00 minutes | To | 17 hours 00 minutes |
| <input checked="" type="checkbox"/> | Friday | 09 hours 00 minutes | To | 17 hours 00 minutes |
| <input type="checkbox"/> | Saturday | 09 hours 00 minutes | To | 17 hours 00 minutes |
| <input type="checkbox"/> | Sunday | 09 hours 00 minutes | To | 17 hours 00 minutes |

Holiday List [Add Holiday](#)

| Date | Holiday Name | |
|------------|--------------|---|
| 2011-12-25 | Christmas |  |

Define separate work schedules, including holidays
for accurate SLA timelines

| SLA Performance | | | | |
|-----------------------|-----------------|------------------|--------|----------|
| SLA | Tickets checked | Tickets breached | Target | Achieved |
| Ticket Assignment SLA | 3 | 2 | 100% | 33.33% |

Track Performance Goals with built-in
SLA Reporting

Application Programming Interface (API)*

Extend the capabilities of Helpdesk Pilot,
integrate with 3rd party applications

* Available on the Enterprise Edition only

API

- RESTful Web Service
 - Supports JSON, YAML, XML, Form Urlencoded and Multipart Form Data formats
- Create tickets from external applications
- Extract ticket details and data items from the help desk
- Full API documentation available on request

helpdeskpilot

Get the Helpdesk Pilot
experience

www.helpdeskpilot.com/try