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

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

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

• 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

- 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

Need I	help with installation	
Send Chat Attach Address Fonts Co	olors Save As Draft Photo Browser Show Sta	thonery and the second s
To: support@acmewidgetco.co	om	requests via email, using
Cc:		
Bcc:		their mail clients
Reply To:		
Subject: Need help with installation		
	O O Gmail - Compose Mail - vio	torbaker10@gmail.com
Dear Support,	end Save Now Discard Draft autosaved	at 3:17 PM (13 minutes ago)
I just bought Product A and need help in set	To: feedback@acmewidgetco.com	
Could you let me know when this can be an		
Thanks a lot!	Add Cc Add Bcc	□ Untitled - Message (HTML) _ □ X
Regards, Sub	oject: Great customer service	Image Insert Options Format Text Image
John Doe	Attach a file	
अ	Г в I Ц Ј-тТ-Т, Т, 😨 😇 🔄 🗄	Paste J B Z U B Z A E E E E E E Address Check Book Names Do V Up V Spelling
=		Clipboard 🗟 Basic Text 🗟 Names Include 🗟 Options 🗟 Proofing
	li Guys!	To enquiries@acemwidgetco.com
		Send Subject: Pre-sales questions
	just wanted to let you know that I'm impressed with	Hello,
Y	our support team is top-notch. Keep up the good wo	I am interested in purchasing your software solution and have a few questions.
	Cheers	Could someone from your sales team please call me on 123 456 7890 as soon as possible?
V	lictor	
		Thank you.
		Jim Black

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus vel magna sem, ut aliquet felis. Proin fermentum nulla in sem fermentum varius. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Integer imperdiet auctor lacus, vitae posuere sapien ultrices nec. Aliquam ut ipsum eros, vel hendrerit velit. Aenean pulvinar turpis sit amet sem aliquet eu varius leo viverra. Praesent lobortis nulla id elit condimentum cursus. Sed diam nibh, tincidunt non pharetra at, dapibus id neque. Nam vulputate gravida pretium. Duis sed tellus nulla, eget condimentum justo. Proin pharetra porta tellus, tincidunt pretium ante rutrum in. Proin ac laoreet felis. Sed aliquar X um feugiat.

Phasellus nec eros quis felis eros, vel faucibus

Phasellus ac neque me amet facilisis sapien. M pellentesque. Curabitu fringilla non placerat e rutrum quis risus. Pelle vestibulum at metus. Q

ŝ	ec imperdiet fo
,	ccumsan dapi
Ę	a metus pelle
	inc mauris, co
5	ue. Curabitur
	nec porttitor
	,

Lorem ipsum dolor sit a
ante ipsum primis in fau
Integer imperdiet auctor
leo viverra. Praesent lot
sed tellus nulla, eget cor
Phasellus nec eros quis
felis eros, vel faucibus s

Phasellus ac neque meta amet facilisis sapien. Ma pellentesque. Curabitur fringilla non placerat eg rutrum quis risus. Peller vestibulum at metus. Cr

nentum justo. Proin pharetra p	orta tellus, tincidunt pretium ante rutrum in. Proin ac laoree	
Contact Customer Ca	are	ecenas non justo ni
Use this form to submit your supp	port request to our Customer Care Dept.	amus eu augue elit,
Full Name	Email Address	are lacinia nisi vitae
		. Nunc risus mauris
		euismod lobortis,
		el elit molestie rhon
Category		tae libero urna.
	\$	Duis semper, sapie
		is sem. Praesent ten
Subject		uere massa ornare q
		enas blandit luctus
		que egestas sollicit
		cursus volutpat.
Attach a File		
Message		m varius. Vestibulu
		s posuere cubilia Cu
		et sem aliquet eu va e gravida pretium. I
		pretium feugiat.
		idum. Suspendisse
		ecenas non justo ni
		amus eu augue elit,
		are lacinia nisi vitae
Create Ticket Reset		. Nunc risus mauris
Create Ticket Reset	customer support software	by Helpdesk Pilot euismod lobortis,
		el elit molestie rhon
		tae libero urna.

Donec imperdiet felis ut diam pulvinar in tincidunt tellus aliquam. Nullam risus tortor, tristique quis accumsan at, convallis pulvinar velit. Duis semper, sapien nec accumsan dapibus, magna erat tincidunt lacus, eget vehicula libero enim vitae purus. In pulvinar ornare ante id facilisis. Cras in iaculis sem. Praesent tempor enim a metus pellentesque non luctus diam scelerisque. Quisque fringilla cursus mi quis rhoncus. Vivamus pretium molestie leo, nec posuere massa ornare quis.

Embeddable request submission form on your website

happyfox

Create new ticket

Search Knowledge Base

Tenmiles Corporation	Tenmil	es	Cor	por	atio
----------------------	--------	----	-----	-----	------

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

P	2	c	c	v	 or	d	
	C	-	-			u	

Forgot password?

Remember me

Browse KnowledgeBase Helpdesk Pilot Knowledge Base Most Viewed Articles Top players are still in play at Wimbledon (7) testing this (4) Kershaw weaves a beauty (2) Instances of torture are still rampant in pockets of State: study (1) Free or open source for students? (1)

Login

Self-service end user interface

• •	0		Helpdes	sk Pilot – View Tickets			H ₂
ACM	E Widget Co	mpany			New Ticket My Settings	Jack Smith Logout	
Das	hboard Tic	<mark>kets</mark> Manage Con	tacts Reports	Knowledge Base			
My G	Queue Pendin	ng All New Open	On Hold Solved	I			
Tick	ets showing 1 - 6 of	f 6			Search Tickets	S	EARCH
	Actions	A V		Sort by	All Categories	1-6 ‡	D
	#HDPSUPP0000006 SOLVED			Customer Service has been	top-notch. You guys roc	last updated 06-jun-2011	U
4	s 🕲	assigned to ~	raised by John Doe	priority Normal	category Support Dept	due date: Not Set	•
0	#HDPSUPP0000006 NEW			(1) for renewal in a weeks time	e. Could you let me kn	last updated 28-mar-2011	
4	♠ 🖞 ☆	assigned to joesmith	raised by John Doe	priority Low	category Support Dept	due date: Not Set	•
0	#HDPSUPP0000004 SOLVED			oduct but would prefer to h	nave a demo first. Coul	last updated 25-feb-2011 [1 new]	
9	★ 	assigned to brian	raised by Jim Black	priority High	category Support Dept	due in: 17 days	•

Incoming requests converted into uniquely identifiable tickets

000	Helpdesk Pilot – Ticket Detail – #HDPSUPP00000194	R
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 Attachments None None	
Current Status		1
Current Status : NEW	Add Update Add Private Note Delete Ticket	
Add Update		
	Add CC Add BCC Attach a File Edit Subject Quote Reply	1
	Choose File Pricing.pdf Remove	l
	Thanks for getting in touch with us John.	l
	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,	l
		l
		l
	Insert link KnowledgeBase Article 💠	
	update customer : status : priority : assigned to : time spent: set due date : add new tags : Yes New Normal Ime (admitive) <	
	Update Ticket Reset Cancel	1

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		Now Stoff				
Add & edit client custom fields	Access integrations page	Add & edit canned action	s	New Staff Add new staff members. Click here	to add multiple staff users	at once.		
Add & edit SLAs	Create & access reports	Export reports		First Name		Last Name		
Ticket Level Permissions			Select all					
Add reply via email	Add reply via web form	Edit replies		Email Address		Role		
Delete replies	Delete tickets	Mark as completed				✓ Administrator		
Move tickets	Split tickets	Assign tickets				Staff		_
Set due date	Access All Tickets	Add related ticket						
Reassign Tickets	Act on closed tickets	Change ticket contact		Associate Categories				
Create tickets in unassociated categories	Move tickets to unassociated categories			Feedback	Enquiries		Support Dept	_
Save Settings Reset			Cancel	Save Settings Reset				

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	Priorities
ON HOLD	On Hold	pending	3	Setup and cu
SOLVED	Solved	completed	4	Priority N
Add a new status				Low

tup and customize priorities her	e. Add. Delete. Rename. Reorder.	
Priority Name	Order	
Low	1	
Normal (current default)	2	
High	3	
Critical	4	
Add a new priority.		

Custom statuses & priorities

00	Helpdesk Pilot – Ticke	et Detail – #HDPSUPP00000194
ACME Widget Con	npany	New Ticket My Settings Jack Smith Logout
Dashboard Tick	ets Manage Contacts Reports H	Knowledge Base
My Queue Pending	All New Open On Hold Solved	
« Back to tickets view		Jump to last response Next Ticket »
#HDPSUPP00000194 Re NEW Hel	llo,	st updated minutes ago
★ ¥ ☆ assi adr	Type of Request Hardware \$ Hardware Type PC	e date: it Set
Time Spent add 0 minutes	Update Info Reset	Cancel
Contact Information	edit	
Company Name ABC Enterprises	Support Contract Expiry Date 12/08/2011	Phone No 1234567
Additional Informatic	on <u>edit</u>	
Type of Request Hardware	Hardware Type PC	
Messages		Collapse All
John Doe Helle 3 minutes ago	0,	
	interested in signing up for your service.	
Cou	Id you provide me with more details on pricing?	

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

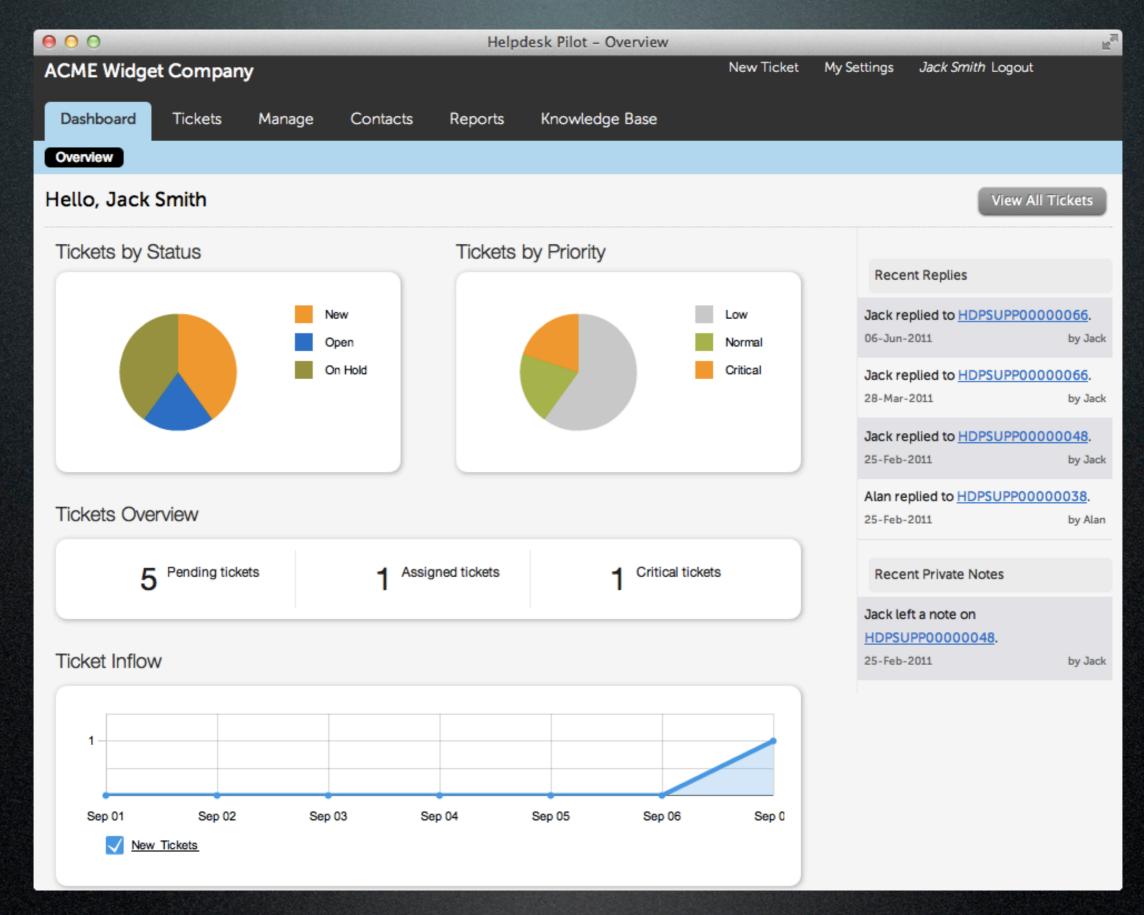
Enhanced productivity Aimed at benefiting every help desk staff

000	Helpdesk Pilot – Mass Reply	R _M
ACME Widget C	New Ticket My Settings	Jack Smith Logout
Dashboard	ickets Manage Contacts Reports Knowledge Base	
My Queue Pen	ding All New Open On Hold Solved	
« Back to tickets view		
Confirm Mass Reply to multiple tick		
#HDPSUPP00000041	Need clarification on pricing	last updated 25-feb-2011
€ #HDPSUPP00000048	Interested in a demo	last updated 25-feb-2011
#HDPSUPP00000194	Request for Information	last updated 4 minutes ago
	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 : status : priority : assigned to : time spent: set due d Yes ♦ Open ♦ Low ♦ me (admi ♦) □ □	ate : add new tags :
	Update Ticket Reset	Cancel

Multiple responses with a single reply

	#SD0000038 NEW)38	Great customer service Hi Guys! I just wanted to let you know that I'm impressed with the level of service you offer. Your			last updated 20 hours ago	
_	4	ÿ	ដ	assigned to admin	raised by Victor Baker	priority Normal	category Feedback	due date: Not Set
	W Re	nanks a e appre egards, iend Re	ciate th	e kind words! Cancel				

Rapid responses using Quick Reply



Individual staff dashboard with key statistics

Re: Great Customer Service #SD0000038		
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		
$\equiv \mathbf{v}$	Signature: None 🗘 ! 🗘	
Hi Victor,	A	
Thanks for the great feedback,		
We'll make sure we continue to improve on the level of service we offer!	iPad ≎ 12:56 PM	92 % 🖼
Regards,	Tenmiles Cancel Re : Great Customer Service #SD00000038 Send	◆ ☑
Alan	Q Search Inbox To: support@acmewidgetco.com	Hide
On 25-Feb-2011, at 10:20 AM, Feedback wrote:	Tenmiles S New request: A Cc/Bcc, From: alan@tenmiles.com	
### Reply above this line to append to the ticket ### Dear Alan Miller,	### Reply above ticket ### Dear Subject: Re : Great Customer Service #SD00000038	
You have a new ticket/reply waiting for you at	DHL Custor DHL Shipment Hi Victor,	Aark as Unread
http://support.acmewidgetco.com/staff/ticket/38	Notification for s "Customs cleara Thanks for the great feedback!	
Request Ticket Details:	Swarna Re Request for cu: Sent from my iPad	
Hi Guys,	I had with Naver	
I just wanted to let you know that I'm impressed with the level of service you offer.	New request: V	
Your support team is top-notch. Keep up the good work!	Dear Vikram Bh waiting for you a	
Cheers Victor	QWERTYUIOF	
Ticket number : SD00000038 Client Name: Victor Baker	Q W E R T Y U I O F	
Client's email: victorbaker10@gmail.com Priority: Medium		
Addressed to Eeedback	A S D F G H J K L	return
	.?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 Miller, our Sa	es 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 o	emo?				
PRIVATE NOTE	Those new brochures arrived yesterday, so you could make use of the new	v collateral beginning today.				
	Thanks!					
	Changed priority to high, changed due date to 2011-02-25, added time s	pent 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

0 0	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	
	Insert link KnowledgeBase Article 💠	
	update customer : status : priority : assigned to : time spent: set due date : add new tags : Yes New Normal me (admi \$ Ime (admi	
	Update Ticket Reset Cancel	1

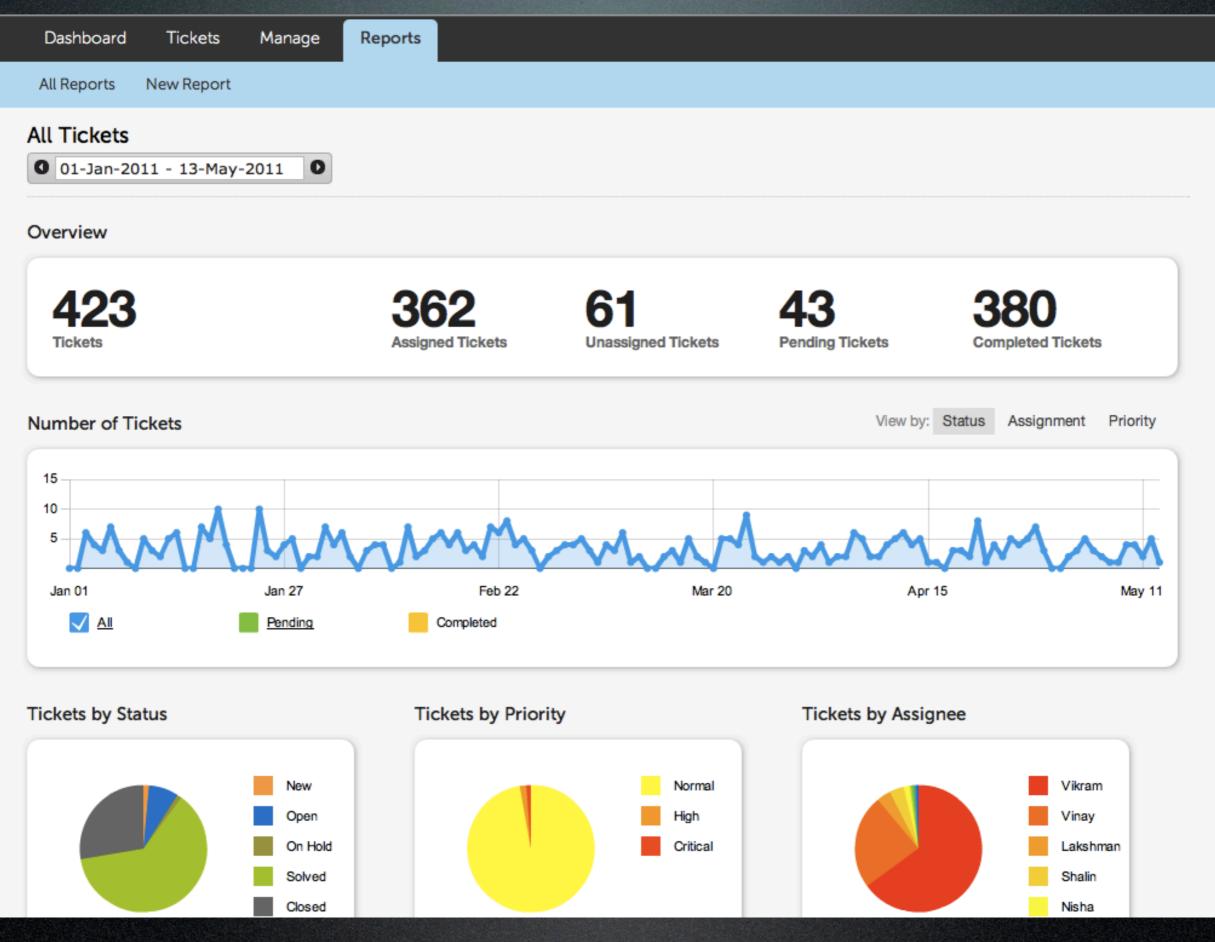
Insert pre-defined response templates and ticket level actions using Canned Actions

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

¥

00	Helpdesk Pilot – Report										
Response Stats View			12345	Re	esp	on	se	Sta	tis	tics	
4.22m Average First Response Time	80% responded within first 2 hours 20% responded within 24 hours 0% responded after 24 hours										
4.22 m Average Response Time	80% responded within first 2 hours 20% responded within 24 hours 0% responded after 24 hours										
1 responses Average no. of Replies	80% responded within first 2 hours 20% responded within 24 hours 0% responded after 24 hours										
1 responses Average # response to completed state	100% responded within first 2 hours 0% responded within 24 hours 0% responded after 24 hours										
		000			Helpdesk Pilo	ot – Report					
		Staff Activity View								1234	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	
Staff A	Letivity	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

00	Helpdesk	Pilot – Knowledge Base	M ²
ACME Widget Company			New Ticket My Settings Jack Smith Logout
Dashboard Tickets Manage (Contacts Reports	Knowledge Base	
Browse Sections Articles Settings			
Knowledge Base Online Support Reference for product and technical inform	mation		Search KnowledgeBase
Sections User Guide & How To's (6)	Change Log (0)	Add section	Search Knowledge Base SEARCH
Configuring Helpdesk Pilot (0)	Installing Helpdesk Pi	<u>lot (</u> 0)	
Sales & Billing (0)	Troubleshooting (0)		Knowledge Base
			Total Articles: 6
			Browse KnowledgeBase Home
			Choose Section 😫
			Most Viewed Articles
			Moving a ticket to another category (31)
			Send a Mass Reply (12)
			Adding a Private Note on a ticket (12)
			Customize notification templates (8)
			Creating a ticket on behalf of a contact (7)

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	Work Schedule	
Yes 🛊	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)						
Initia	al Work Schedu	le					
Description Time Zone Monday to Friday 9AM to 5PM GMT +00:00 \$							
Work	king Hours						
۷	Monday	09 \$ hours 00 \$ minutes	To 17 + hours 00 + minutes				
	Tuesday	09 \$ hours 00 \$ minutes	To 17 \$ hours 00 \$ minutes				
	Wednesday	09 \$ hours 00 \$ minutes	To 17 \$ hours 00 \$ minutes				
	Thursday	09 \$ hours 00 \$ minutes	To 17 \$ hours 00 \$ minutes				
	Friday	09 \$ hours 00 \$ minutes	To 17 \$ hours 00 \$ minutes				
	Saturday	09 \$ hours 00 \$ minutes	To 17 \$ hours 00 \$ minutes				
	Sunday	09 \$ hours 00 \$ minutes	To 17 \$ hours 00 \$ minutes				
Holiday List Add Ho							
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



• 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



Get the Helpdesk Pilot experience

www.helpdeskpilot.com/try