Reporting in Desk.com
Extracting Metrics & Insights

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Today's Agenda

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➢ Customer Experience
➢ Service Industry Metrics
➢ Business Insights
➢ Exports
➢ API
➢ Resources
➢ Q&A

Reminder: Today’s webinar will be recorded & emailed to registered attendees
The Customer Experience
Salesforce Research

Service teams are focused on improving brand experiences, generating new sales opportunities, and proactive customer outreach as a means of competitive differentiation.

71% of service professionals have implemented more customer-oriented KPIs to measure performance.

61% of service teams say their strategic vision has become more focused on understanding a customer’s full history with their company.

Source: State of Service 2017, Salesforce
Service Industry Metrics

Here are some of the industry’s top reportable metrics:

- First Contact Resolution
- Time to First Response
- Average Handle Time
- Case Volume
- Customer Satisfaction

Desk.com Metrics Glossary
# Reporting in Desk.com Summary

## 3 Ways To Extract Data

<table>
<thead>
<tr>
<th>BUSINESS INSIGHTS</th>
<th>CASE EXPORT</th>
<th>API</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-the-box</td>
<td>CSV downloaded from Desk.com Classic Agent</td>
<td>API scripts (documented at dev.desk.com)</td>
</tr>
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<td>Reports standard service industry metrics on cases within Desk.com</td>
<td>Export cases from a Filter or Search results</td>
<td>Query case endpoints to harvest information</td>
</tr>
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<td>Use to report on overall case and team stats and to save regularly needed reporting views</td>
<td>Use to generate a consolidated table of case data for further analysis (e.g. pivot tables, charts, etc.)</td>
<td>Use to integrate data with existing reporting solution or control how and where the data is displayed</td>
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Business Insights
Native reporting tool in Desk.com

Access to Business Insights
Reporting Agent
Workflow Manager
Knowledge Base Manager
Content Manager
Business Manager
Administrative Manager
Administrator
Billing Administrator
Case Export Demonstration
Case Exports
Available in Classic Agent

- Company
- First & Last Name
- Email Address
- City, Region, Location
- Twitter ID
- Facebook URL
- Priority
- Channel
- Case Status
- Assigned Agent & Group
- Macros Applied
- First Macro
- Last Macro
- Created At
- Modified At
- First Opened At
- Time of First Response
- First Resolved At
- Resolved At
- Handle Time
- Inbound Messages
- Outbound Messages
- Last In
- Last Out
- Last Message Direction
- Labels
- Browser
- OS
- IP
- Language
- Body
- CSAT Rating
- CSAT Comment
- CSAT Rating Scale
- Company Custom Fields
- Customer Custom Fields
- Case Custom Fields
## API: Using the API: General

### General

**Requests**

All requests must be made over HTTPS. All data is sent and received as JSON.

When making requests, you receive data as JSON by properly setting the `Accept` header to `application/json`, as shown in the example below:

```
$ curl https://yoursite.desk.com/api/v2/cases/sid \
  -u email:password \n  -H 'Accept: application/json'
```

When creating or modifying resources, you need to send the data as JSON by properly setting the `Content-Type` header to `application/json`, as shown below:

```
$ curl https://yoursite.desk.com/api/v2/cases \
  -u email:password \n  -X POST \n  -H 'Content-Type: application/json' \n  -H 'Accept: application/json' \n  -d '{"subject":"Test"}'
```
USE [DataWarehouse]

/*------ Object: Table [dbo].[DeskDotComCasesDataset] Script Date: 6/6/2017 12:49:00 PM ------*/

SET ANSI_NULLS ON
GO
SET QUOTED_IDENTIFIER ON
GO

CREATE TABLE [dbo].[DeskDotComCasesDataset](
    [id] [char](18) NOT NULL,
    [external_id] [char](18) NULL,
    [blurb] [varchar](max) NULL,
    [priority] [char](10) NULL,
    [locked_until] [char](30) NULL,
    [active_at] [char](30) NULL,
    [changed_at] [char](30) NULL,
    [created_at] [char](30) NULL,
    [updated_at] [char](30) NULL,
    [first_opened_at] [char](30) NULL,
    [opened_at] [char](30) NULL,
    [first_resolved_at] [char](30) NULL,
    [resolved_at] [char](30) NULL,
    [status] [char](18) NULL,
    [active_notes_count] [char](18) NULL,
    [active_attachments_count] [char](18) NULL,
    [has_pending_interactions] [char](18) NULL,
    [has_failed_interactions] [char](18) NULL,
    [description] [varchar](max) NULL,
    [language] [char](20) NULL,
    [received_at] [char](30) NULL,
    [type] [char](30) NULL,
    [labels] [char](500) NULL,
    [subject] [varchar](max) NULL,
    [route_status] [char](30) NULL,
    [order_number] [char](30) NULL,
    [web_order_number] [char](30) NULL,
    [contact_reason] [char](500) NULL,
    [sub_reasons] [char](500) NULL,
    [DateInserted] [datetime] NOT NULL,
)

PRIMARY KEY CLUSTERED
(
    [id]
)
WITH (PAD_INDEX = OFF, STATISTICS_NORECOMPUTE = OFF, IGNORE_DUP_KEY = OFF, ALLOW_ROW_LOCKS = ON, ALLOW_PAGE_LOCKS = ON) ON [PRIMARY]
GO

ALTER TABLE [dbo].[DeskDotComCasesDataset] ADD DEFAULT (getdate()) FOR [DateInserted]
GO
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- Use to generate a consolidated table of case data for further analysis (e.g. pivot tables, charts, etc.)

**API**

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Resources

support.desk.com
trailhead.salesforce.com
www.desk.com/webinars-events
support@desk.com
status.desk.com
Business Insights