Agent Training

NEXT GEN AGENT
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1 Introduction to Desk.com
Introduction to Desk.com

Desk.com is an all-in-one platform that allows you to respond to customer queries across multiple channels and provide online self-service content.

Using Desk.com, you can:

- Respond to customer queries across multiple channels
- Collaborate with colleagues to resolve cases
- Run reports on key metrics such as first contact resolution rate, average response time, average tickets to resolve, and customer satisfaction
- View and create public and private knowledge articles
Agent Console
Agent Console

**New Case Creation**
Create a new case by selecting an existing customer or creating a new customer record.

**Side Menu: The “Hamburger” Icon**
Access the Admin console, Knowledge Base, Business Insights, Classic Agent, and Desk.com’s support portal.

**Inbox Icon**
Clicking this icon will always bring you back to the Agent Console. You will land on the last filter you were viewing.

**Search Tab**
Search for cases, customers, and companies. Use the bulk update feature.

**Agent Menu**
Access a few Agent settings, reference Keyboard Shortcuts, or sign out of Desk.

**Knowledge Base**
Instant access to public-facing and internal support articles.

For training on Classic Agent, see this article.
Top Navigation Bar

Toggle between Admin and Agent consoles, view system updates, and access settings.

1 **Side Menu**
   - Click to toggle between the Classic Agent, Admin*, Next Gen Agent, and Business Insights*
     - Classic Agent: Legacy agent console
     - Next Gen Agent: Next generation of the agent console
     - Admin: Admin console used to configure settings and automate workflows
     - Business Insights: Reporting tool
     - Knowledge Base: Menu for viewing knowledge articles

   *You may not see Admin and/or New Business Insights if you do not have the required access level.

2 **Inbox Icon**
   - Clicking this icon will always bring you back to the Agent Console. You will land on the last filter you were viewing.

3 **Quick Search**
   - Perform a quick search by typing in a keyword, customer name, case ID, and more. Click in to access Advanced Search

4 **Working Cases**
   - Case tabs allow you to toggle between currently open cases

5 **New Case Creation**
   - Create a new case by selecting an existing customer or creating a new customer record

6 **Agent Menu**
   - This menu contains a variety of helpful tools for agents.
     - **Keyboard Shortcuts**: Helpful shortcuts to increase efficiency
     - **Settings**: Adjust signature, sounds, and more
     - **Desk.com Intro Tour**: Take a quick tour of the Next Gen Agent console. Learn how to navigate the Universal Inbox and handle a case
     - **Language**: Change the native language for the Desk console

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### Side Menu

- **Classic Agent**: Legacy agent console
- **Next Gen Agent**: Next generation of the agent console
- **Admin**: Admin console used to configure settings and automate workflows
- **Business Insights**: Reporting tool
- **Knowledge Base**: Menu for viewing knowledge articles

*You may not see Admin and/or New Business Insights if you do not have the required access level.

### Quick Search

- Perform a quick search by typing in a keyword, customer name, case ID, and more. Click in to access Advanced Search

### Working Cases

- Case tabs allow you to toggle between currently open cases

### New Case Creation

- Create a new case by selecting an existing customer or creating a new customer record

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**Agent Menu**

- **Keyboard Shortcuts**: Helpful shortcuts to increase efficiency
- **Settings**: Adjust signature, sounds, and more
- **Desk.com Intro Tour**: Take a quick tour of the Next Gen Agent console. Learn how to navigate the Universal Inbox and handle a case
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Case Tab

View and access cases.

Filters

Filters dynamically pull in cases that meet the condition(s) defined in the filter.

Common filters:

- **Inbox**: Shows cases that have not been resolved
- **My Cases**: Shows cases that are assigned to you with any case status
- **Unassigned Cases**: Any cases that do not have an Agent assignment
- **All Cases**: All cases that have been 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.

See this article for more information on filters.

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 set display density and select which headers you'd like to see in the case tab.

You can drag and drop header columns to create your desired view.

Case Labels

Visual cues to provide more context and information about a case. Some businesses allow agents to create new labels from the Case view. Check with your administrator to see how labels are created within your organization.

Case Status

Indicates whether a case is New, Open, Pending, or Resolved. See Case Lifecycle and Status section (p.9) for more information.
Display Density

Select a display density setting that will allow you to work most efficiently. Your personalized setting will not affect other agents working in Desk.

- **Compact**: The most compressed view that shows the least amount of Case information.

- **Cozy**: Each case is given two lines to display information. The Subject column will show a preview of the Case Description.

- **Comfortable**: The most expanded view. Each case is given up to three lines to display information with an additional line for labels.
Knowledge Base

Provides quick access to public, private, and internal articles.

Topics

Each knowledge 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 that says “Private.” Private articles are helpful for internal processes. Examples include: how to process a refund for a customer, things to remember before resolving a ticket, etc.

Creating Articles

Articles can only be created in the Admin console. If you are an agent and would like to create articles, ask your admin for Knowledge access level.

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 the clipboard.
Search Tab

Search for cases, customers, companies. Use the bulk update feature.

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.

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

Advanced Search
Use Advanced Search to find cases based on labels, custom fields, case status, or agents.

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

Search Object
Click for a dropdown to search by case, customer, or company records.
New Case Creation

Step 1: Click on the “Create Case” button
Active channels will appear in the list

Step 2: Select Channel
Available channels will appear

Step 3: Search and select customer
Select existing customer or click “Add new customer”
Then click on “Create Case”

New Case Creation is generally most helpful for logging phone cases.

Most of the time, cases will be automatically created through inbound channels such as email, Facebook, or Twitter.
3 Working Cases
Support tickets can come in through multiple channels. Your site admin will determine which channels are active.

**Phone**
Traditional phone channel. Select if call is inbound or outbound

**Email**
Customers can email your support address. Support tickets originating from the web portal will also come in as email

**Chat**
Customers can live chat with an agent through the web portal

**Q&A**
Customers can ask questions via the webportal. Agents or other customers can answer the question depending on the settings

**Facebook**
Facebook posts or direct messages can be logged as a support ticket

**Twitter**
Twitter mentions or direct messages can be logged as a support ticket
Case Lifecycle and Status

**New**
Status of a new support ticket that has not been opened by an agent
A ticket cannot be set to New once it has been opened

**Open**
A case is Open when the ticket has been opened or updated but a response has not been sent
Generally, the status of Open means that the agent or company needs to follow-up on the case

**Pending**
A case is set to Pending when a response has been sent to a customer
Generally, the status of Pending means that the customer needs to respond or provide additional information

**Resolved**
A case is Resolved when you have answered the question of the customer in full and no further action from either end is required
If a customer responds to a Resolved case, it will re-open the case

Closed and Deleted Case Statuses

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 instead use the status “Resolved” as the endpoint of their case lifecycle.

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. See [this article](#) to learn how an admin can enable case deletion. Deleted cases are permanently removed from your Desk site after 7 days.
Case Lifecycle and Status

Sample Email Case Flow

New

Customer emails in a new case, case appears in the Inbox

Open

Agent opens case and updates case information

Agent sends response to customer

Customer responds, case appears in the Inbox

Agent responds, provides all necessary information and sets the case status to Resolved

Note: When a customer responds to a resolved case, the case will move back to Open

Resolved

Open

Pending

Status Icons

Status icons help offer a quick visual indication of the current state, of both cases and opportunities, by associating shape and/or color.
Working a Case

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 customer's question, click Update, Send, & Resolve.

1. Customer and Company Information
   Click fields to update information in the customer and company records. All customer or company level custom fields will appear in these sections.

2. Open Case Tabs
   Quickly access cases you have opened. Hover over tab to see the Close “X” icon.

3. Case Forward
   Forward the case to any email address entered. Case notes will also be forwarded.

4. Case Related Information
   Update relevant information about the specific case record. You can assign the case to an agent and/or group, edit custom field values, or change the case status.

   If your business uses custom fields, understand your team’s process for filling them out.

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

5. Add Note
   Add notes to the case that are only visible to other agents in Desk. Agents have the ability to edit a note up to 15 minutes after posting it.

6. Reply and Note Area
   Type your response or note here.

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

8. Outbound Email
   Click to manually change the outbound email used.

9. Close Tab
   Check this box to close the case tab when the case is updated. Uncheck it to leave the case open when a case has been updated.

10. 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

- **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.

- **Custom Case Fields**
  Custom fields collect information specific to your business and can be created for a case, customer, or company. They are created by your admin and are often used to run reports.

  A custom field can be a text field, number field, dropdown list, date field, or true/false checkbox

  If your business uses custom fields, understand your team's process for filling them out

- **Linked Cases**
  Create relationships between cases that are related or similar to each other. View all cases that have been linked to the particular case you are viewing.

- **Attachments**
  View all attachments within the case

- **Case Timeline**
  View all events that have occurred within the history of a case. Documented events include users opening or viewing the case, applying macros, or triggering rules to be run by the rules engine.
Managing Customers

- **Standard Customer Fields**
  Edit standard customer information including their name, title, email address(es), phone number, street address, and language.

- **Custom Customer Fields**
  Custom fields collect information specific to your business and can be created for a case, customer, or company. They are created by your admin and are often used to run reports.

  - A custom field can be a text field, number field, dropdown list, date field, or true/false checkbox.
  - If your business uses custom fields, understand your team's process for filling them out.

- **Merge Customer Record**
  If this customer record is a duplicate because the customer uses multiple email addresses or has begun using a new email, you can merge the customer with an existing one.

- **Change Customer**
  If the customer that owns a particular case needs to be updated, you can change the customer here.
Managing Companies

Remove or Change Company

If the customer is associated with the incorrect company or should not be associated with a company at all, you can remove or change the company here.

Standard Company Fields

Edit standard company information including company name and associated email domains.

Custom Company Fields

Custom fields collect information specific to your business and can be created for a case, customer, or company. They are created by your admin and are often used to run reports.

A custom field can be a text field, number field, dropdown list, date field, or true/false checkbox.

If your business uses custom fields, understand your team's process for filling them out.
Merging Cases

Step 1
Start by opening a case and clicking into the Customer History.

Step 2
Find the case you wish to merge and hover over it to select the Case Actions menu icon. Click on the “Merge with Case” option.

Step 3
Make the selections required to merge two cases together.

Note that you can only merge cases that are associated with the same customer. Learn more about merging cases at the Desk Support Center.
Splitting Cases

Step 1
Select the menu icon for the interaction you would like to split out into a new case. Note that only the one interaction you select will be split out of the case. Subsequent interactions will remain in the original case.

Step 2
Click on “Create New Case” in the interaction menu.

Step 3
Make the selections required to create a new case with your selected interaction. Your new case will automatically be linked to the original case.

Splitting cases is helpful when a customer responds to a case or reopens a resolved case with a new unrelated request or inquiry.
Agents can leave notes on a case for other agents to see. Notes cannot be seen by the customer.

You will be able to edit your note for up to 15 minutes. After that period, the menu option will disappear.

A menu option will appear for 15 minutes after your note has been posted.