User Centered Solutions

HelpSpot

USER MANUAL v2.6

A comprehensive review of functionality and usage principles for Help Desk Staff

UserScape

USERSCAPE.COM

HelpSpot 2.6 User Manual

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1 Welcome

If you're reading this manual you've realized that email folders, sticky notes, or even your current help desk tool are no longer the way to handle Customer inquiries. You're looking for an improved experience for Staff and Customers with more advanced capabilities to manage your support operation…**Welcome to HelpSpot!**

1.1 The Big Picture

HelpSpot's core function can be summed up as:

"HelpSpot is a web-based application that empowers companies to effectively manage Customer inquiries."

To create a product that is optimized to support this core function, we kept a few guiding principles top-of-mind:

Accommodate many support channels

Customer inquiries come at you from every direction. HelpSpot accounts for this by supporting the channels you need:

- Email (your current support email account)—**HelpSpot is optimized for email-based exchanges**,
- Web-form (using the portal),
- Phone/walk-up/fax/IM (via User creation), and
- API (covered in API Manual, available online)

Create structured flexibility

The needs of every company differ; some require elaborate issue categorization and meta-data collection capability, while others only loosely categorize issues. To accommodate all types of companies, we provide a structured framework of data collection/categorization that is fully customizable yet still easy to report against.

Require request ownership

Individual ownership is required in HelpSpot. Requests cannot be assigned to a nebulous workgroup or department. Individual ownership is the cornerstone of driving processing efficiency and ultimately Customer satisfaction.

Create a clear, concise, request history

Every request has a complete log of all actions taken and messages sent. This allows any User, at anytime, to become current with a request.

1.2 Using This Guide

This guide attempts to follow the logical flow of the interface to explain both functionality and conceptual principles. Beyond just the simple 'click this, click that' found in a basic 'how to' guide, we aimed to provide context and practical application as Users move through the interface.

Reading through the guide, Users will find each chapter corresponds to the major areas of the system. Each section within a chapter focuses on specific functionality within an area, allowing readers to move continuously or skip around; whichever they prefer.

Where appropriate, there are call outs for:

- Usages tips—suggestions for maximizing a feature can be found in yellow boxes.
- Key concepts—principles on HelpSpot functionality, tagged with a key icon.
- Cross-references—links to related topics within the guide.

1.2.1 Targeted Audience

This manual is intended for all HelpSpot Users, those new to help desk software as well as those migrating from another product.

Administrator-specific settings and configuration options are not covered in-depth in this manual; however, section 1.3 covers the basics for getting Administrators up and running.

1.2.2 Common Terms

It's important to be familiar with the terms regularly used throughout the guide.

- **User**—Anyone with a HelpSpot account.
- **Staff**—Generically refers to any help desk staff member.
- **Staff level**—User with Help Desk Staff level permission to HelpSpot.
- **Administrator**—User with Administrator level of access to HelpSpot.
- **Editors**—Users with capability to create knowledge book content.
- **Moderators**— Users with ability to manage interactions in forums.
- **Customer**—Refers to a support desk's Customers (internal or external): the individuals submitting requests.
- **Request**—The Customer inquiry in HelpSpot.
- **Installation**—The instance of HelpSpot used by a company.

1.3 Getting Up and Running—Administrators

While this guide doesn't specifically cover Administrator configuration, the following provides Administrators with a quick look at the most important steps for getting the installation up and running.

More detailed Information on configuration can be found in the HelpSpot Administrator area of the UserScape site (http://www.userscape.com/helpdesk/index.php?pg=kb.book&id=1).

> The initial password for Administrators is *start*. This should be changed after initial login.

1.3.1 Configure System Settings Page

(*Location: Admin>Settings*) The settings page includes several system-wide configuration options that range from creating status types to defining the layout of the Customer portal. Administrators should review and become familiar with each as an initial step in the set-up process.

> Status types are most useful for defining the resolution for each request.

1.3.2 Create Support Staff Accounts

(*Location: Admin>Staff*) User accounts must be created and assigned access to the system. The following provides a high-level look at each permission level.

Table 1.2.3a: User Permissions Levels

Permission Level	*Global and System Settings*	*Inbox (new & unassigned requests)*	*Access to requests in assigned categories*	*Access to assigned requests*
Administrators	√	√	√	√
Help Desk Staff		√	√	√
Level 2 Support			√	√
Guest				√

1.3.3 Create Request Categories

(*Location: Admin>Categories*) To effectively route requests and allow for concise request reporting, Administrators will need to define request categories. Permissions for default ownership, accessibility by assigned Staff, and visibility on Customer portal must also be set for each category created. Reporting tags for each category are an optional way that further classifies individual requests.

1.3.4 Create Support Mailboxes

(*Location: Admin>Mailboxes*) HelpSpot mailboxes serve as a way to seamlessly integrate email exchanges. By adding individual mailboxes, HelpSpot can pull all messages sent to existing support email account and create new requests or append notes to existing requests. Through additional configuration, Administrators can opt to route requests resulting from emails into specific categories or auto-assign to selected Staff.

1.3.5 Define Custom Request Fields

(*Location: Admin>Tools*) Custom fields are a means to create User-defined fields for the collection of meta data. With 11 different types available Administrators have a robust, structured framework for collecting the information specific to their product/service or organization.

1.4 Logging in and Getting Started

When an account is created, the User receives via email his/her account login information. Upon login Users are brought to the workspace and it is from here that we'll begin...

2 The Workspace

The workspace, or the initial landing page, can be thought of as the hub of all request management within HelpSpot. It is from here that Users can access individual request management functions: creating, viewing, and updating. This chapter looks at the basic structure, layout, and function of each of the areas within the workspace.

Unique to HelpSpot is the concept of required, individual ownership of requests. Required request ownership drives accountability, efficiency, and ultimately Customer satisfaction.

2.1 Getting the Lay of the Land

For the purposes of understanding the overall structure, let's break the workspace out into three areas. These areas are briefly introduced below and covered in-depth in subsequent sections.

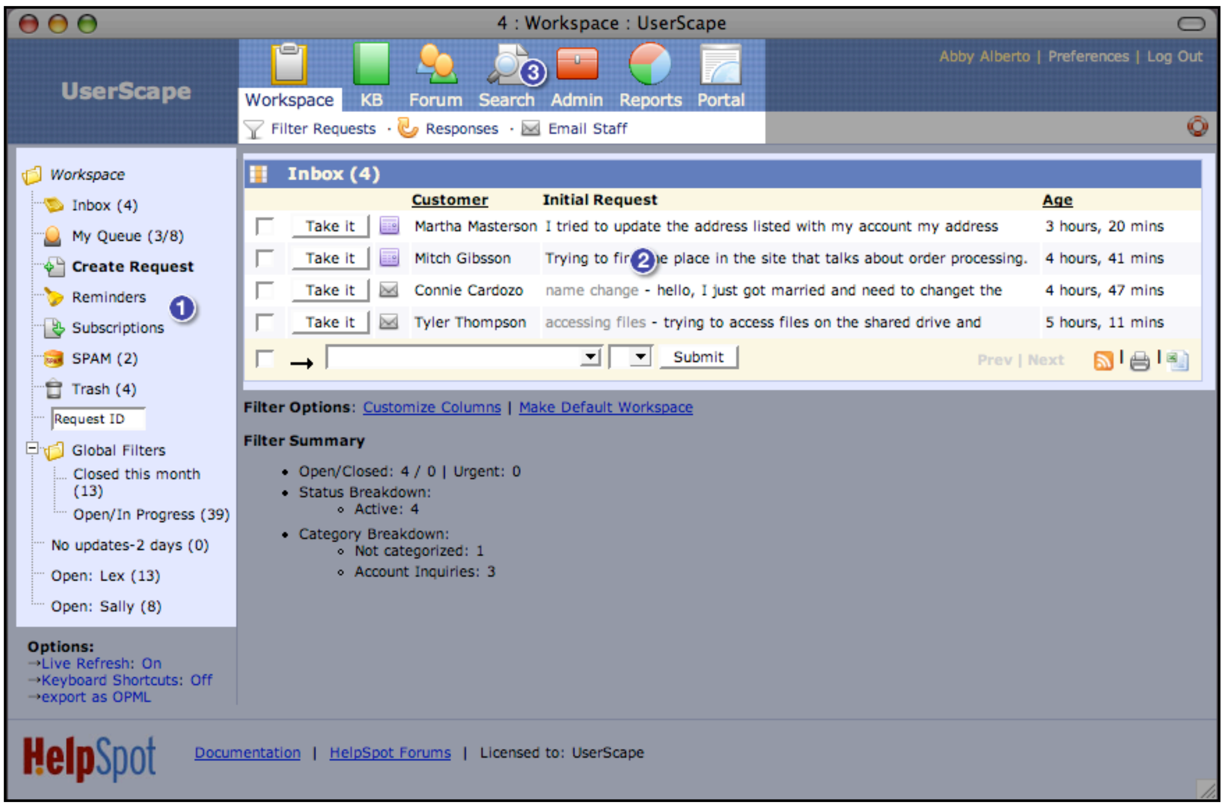


Figure 2.1: Getting the Lay of the Land—The Workspace

1. Left Navigation. This area includes all of the links running along the left side of the screen. These links provide access to varying request views and related actions. Once a User moves to another area of HelpSpot (for example: Admin or Forums), this navigation is no longer present.

2. Request grid. Conceptually, the request grid is the display area for requests meeting specified criteria. Criteria will vary depending on the filtered view a User is in. The criteria used to determine the requests displayed in the request grid (for any given filtered view) are defined by:

- Users or Administrators; through filter creation,
- System default views: the Inbox and My Queue.

Functionally, it provides both a quick look at multiple requests as well as a means to access individual requests.

3. Top Navigation. Within the Workspace tab there are a few sub-navigation items for features specific to the workspace.

Requests live in one of two states, assigned or unassigned, the basic criteria for many system-default views and actions.

2.2 Left Navigation Links

Within the left navigation of the workspace, Users will find links to the functions and request views available in the workspace.

All left navigation request views load within the center, or request grid, area.

2.2.1 Inbox

On a very broad level the Inbox is home to all unassigned requests. As such, its primary function is to serve as the entry point for new requests (submitted via email, portal or other channel).

Users can take a request from the Inbox by simply clicking on the *Take It* button to the far left within the request grid. Upon doing so, Users will immediately be taken to the request page for that request.

See section 2.3 for more on the request grid

Ownership begins as soon as a User takes a request out of the Inbox; it is no longer shown in the Inbox and will instead show in that User's My Queue.

Requests information can be reviewed without entering the request simply by ***hovering*** over the Take It button (or Request ID) and using the menu as shown in Figure 2.2. This is available in all request grid views, not only the Inbox.

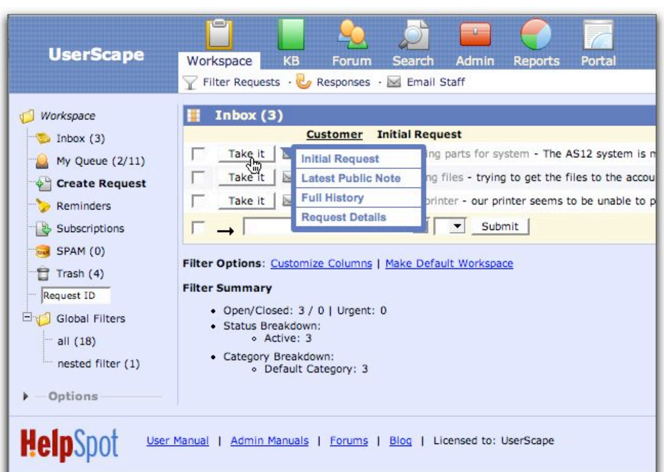


Figure 2.2: Request Preview in Action

2.2.2 My Queue

As mentioned in the previous section, once a request is assigned to a User it is no longer available through the Inbox and can be found in the User's My Queue.

> Request assignment can occur in several ways: User takes a request from Inbox, one User assigns a request to another User, or an automated process handles the request.

Once a User clicks My Queue, the request grid in the center of the screen will load all the open requests assigned to that User.

The list of requests shown here will vary between Users because it reflects the requests assigned to the person logged-in. Additional views, or filters, can be created and saved for viewing requests assigned to others. See section 2.2.8 for creating/managing filters.

HelpSpot uses My Queue as the default view when Users login and click the Workspace tab. However, this is customizable, allowing Users to select any filtered view as the default.

2.2.3 Create a Request

Unlike the Inbox and My Queue areas, the request grid will not appear when clicking Create a Request. Instead, Users are brought directly to the request page for the purpose of creating a new request in the system.

The Create a Request ability allows for the support of channels not directly integrated into HelpSpot (such as phone, IM, walk-in, or staff initiated). This allows inquiries arising from these channels to be captured in the form of a request, keeping it consistent with email and the portal web-form.

2.2.4 Reminders

From the request page of an individual request, Users can set a reminder. Reminders are emailed at the designated date/time to selected Users and are listed under the Reminders area of the workspace.
To access all of their reminders, Users should click the Reminders link. Similar to My Queue, only reminders that include the logged-in User will be shown—not all reminders created within the system.

Once in the reminders list, Users can click the request ID to go directly into an individual request.

See section 3.8.3 for creating reminders

2.2.5 Subscriptions

Users can follow changes made to requests that aren't assigned to them by opting to subscribe to a request.

The Subscriptions link on the workspace allows a User to access all requests for which they are subscribed. It is from the subscription list that Users can view the individual requests or delete the subscription.

See section 3.8.6 for creating subscriptions

2.2.6 SPAM

SPAM (overt advertising, typically created via an automated process) is a common problem for support centers that openly publish support email addresses or web-forms. To prevent it from interfering with true Customer inquiries or incorrectly skewing reporting, HelpSpot has integrated a trainable SPAM tool.

Training the SPAM Tool

HelpSpot will initially depend on Users to flag requests that are SPAM. Over time, while this flagging is being done, HelpSpot will learn to recognize the SPAM specific to the installation and automatically flag it accordingly.

> Users can flag requests as SPAM in either the request grid or the request itself.

All requests flagged as SPAM are available via the SPAM link in the left navigation. From here, Users can use the request grid to click into the request or select and delete it.

Removing the SPAM Flag

If either a User or the SPAM tool incorrectly flags a request as SPAM, check the box next to the request and use the drop-down at the bottom of the request grid to select *Mark as Not SPAM*. After hitting *submit* the request will move into the Inbox where it can be taken by any User.

Administrators are the only User level that can remove SPAM flag.

Deleting SPAM

SPAM must be deleted to reinforce the systems learning process. To delete, check the box next to each request and use the drop-down at the bottom of the request grid to select *Delete SPAM*. Hit *submit* and the SPAM will be completely removed from HelpSpot.

2.2.7 Trash

Requests that aren't necessarily SPAM but don't need to be worked or counted towards reporting can be flagged for the Trash. Using the Trash is a means for handling email bounces, training/test requests, and duplicate requests.

2.2.8 Filters

Filters are custom-created views of requests. Each filter has a set of criteria, defined by the creator, which each request must meet to be returned in the result set. Filtered views can be created and saved on the User or global level.

> Global-level items are those that can be created and managed only by Administrators but viewed by all Users.

Filters are created via the Filter Requests link within the sub-navigation of the workspace tab.

To access these custom views, Users can look at the bottom of the left navigation as highlighted in Figure 2.3. All global filters will be located within the global filters folder. User-created filters can be organized within a User-defined folder structure, in which case the left navigation would reflect the individual User's folder structure.

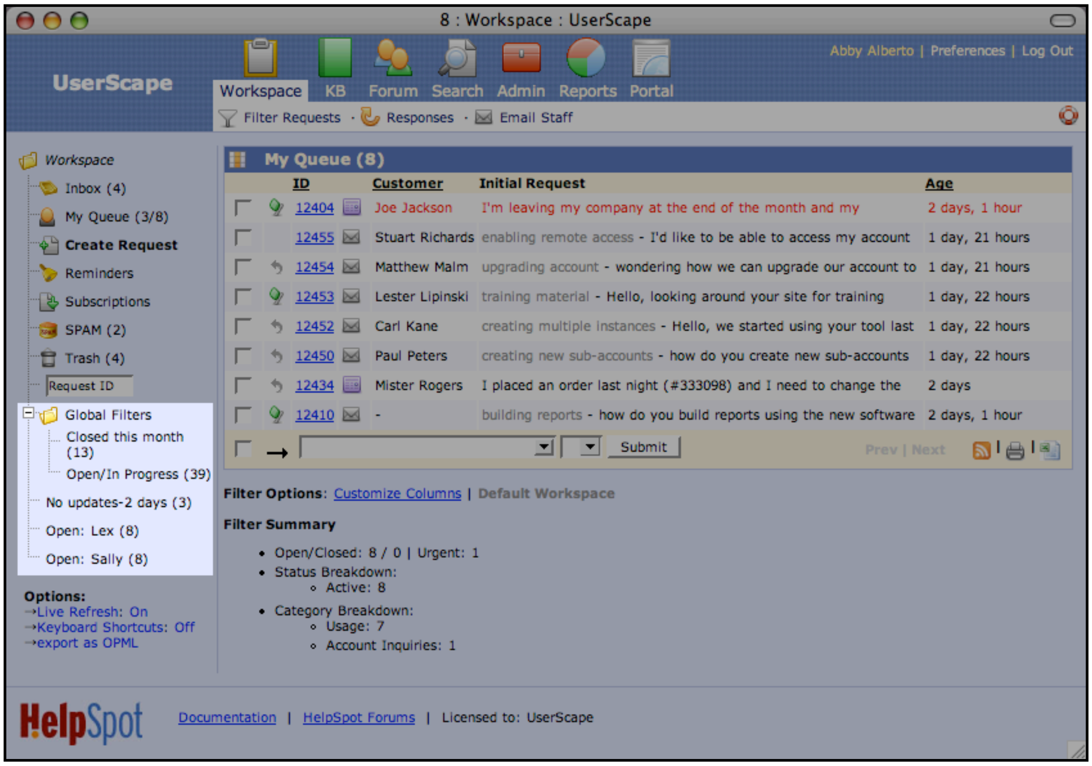


Figure 2.3: Filters in the Left Navigation

See section 2.4.1 for creating filtered views

2.2.9 Options

The bottom of the left navigation contains several options for within the workspace.

- *Live Refresh*. HelpSpot checks for new requests or updates every 30 seconds. Counts listed beside each filtered view are updated and the current view is refreshed. This feature is defaulted to Off. Click the On link next to the label to enable.

- *Keyboard Shortcuts*. Allow Users to navigate between, and within, views in the workspace without using the mouse. For example, with shortcuts enabled a User can use the "1" key to go to the workspace default from any view. A guide to available shortcuts can be found by clicking the Keyboard Shortcuts label. To enable this feature, click Off just after the label.

- *Export as OPML*. Users can export a file that contains information for all RSS feeds available in HelpSpot.

2.3 The Request Grid

The request grid is the display area for requests meeting specified criteria. The criteria will vary depending on the filtered view (Inbox, My Queue, or custom-filtered view) the User is in.

Within this section we'll take an in-depth look at the request grid layout as well as the actions that can be performed.

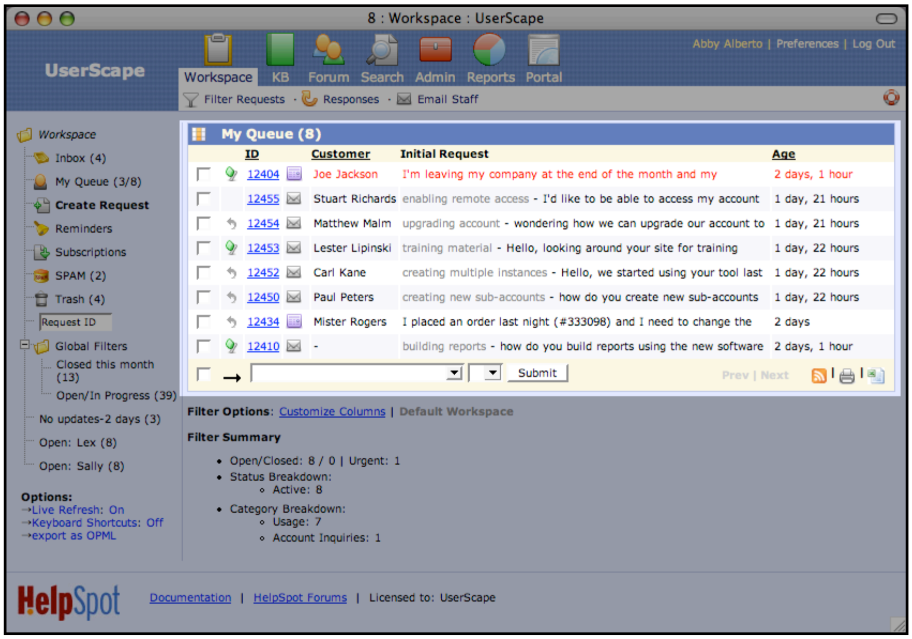


Figure 2.4: Request Grid

2.3.1 View Heading

At the top of every request grid is the name of the view, as shown in Figure 2.4. For those views that are system created, it will be the names designated by HelpSpot; Inbox and My Queue. For those views created by Administrators or Users, via filters, it will be the name designated during filter creation.

Just after the view name, Users will find a request count in parentheses. This count reflects the number of requests that match the defined conditions.

2.3.2 Request Lists

The request grid returns specific information, or columns, for each request that is included in the results set for the view.

Each request listed has a check box to the far left. This allows you to quickly select the individual request(s) for use with the *Quick Actions* drop-down.

See section 2.3.3 for more on using quick actions

The Inbox and My Queue have a default set of columns that are returned. Working left to right in the request grid, each is outlined below.

> The request results for filtered views (created by Users and/or Administrators) return the columns as specified at time of creation. See section 2.4.1 for information on columns specific to filtered views.

- *Take It (**Inbox only**)*. Allows Users to take a request to work. Once clicked, Users will be brought to the request page. At this point the request is assigned and will no longer be visible in the Inbox.

- *Read/Reply Indicator*. A graphical indicator of the most recent action taken on the request.

- Green Flag (***My Queue only***). The most recent update to the request that is unread by the assigned User.
- Circular Arrow. A Staff member was the last to reply.
- Empty, or no graphic. User has read the update but a Staff member has yet to reply.

- *Request ID*. This is the ID auto-assigned to each request when it enters the system. To enter the request page for the request, Users must click the hyperlinked Request ID. Within the Inbox, there is no request ID but rather the Take It button.

- *Contacted Via*. This column provides a graphical representation of how the help desk was initially contacted by the Customer.

- *Customer Name*. First and last are shown, if provided.

- *Initial Request*. Shows the first few sentences of the initial request sent by the Customer. The text can be clicked to preview the body of the message.

- *Age*. Shows the length of time that has passed since the initial request was created.

Sorting

Clicking on any column heading (exception: initial request), Users can sort the results in the request grid by high/low or low/high.

Preview

Whether in the request results of a filtered or system-generated view, Users can click the text in the initial request column to preview a request prior to entering the request. Figure 2.2 shows the preview in action.

2.3.3 Quick Actions

The *Quick Actions* drop-down allows Users to perform actions on groups of requests directly from the request grid page, which saves Users from entering the request page for each individual request. The quick action drop-down can be found at the bottom of the request grid for all request views.

Once the action is selected (some require selections to be made in multiple drop-down menus), Users must click *Submit* to apply the selected change. The workspace page will reload so Users can continue working within the request grid for the current view.

The actions available within the quick action drop-down will vary depending on the User's access level, but include:

- *Moving Categories*. Users can opt to assign selected requests to a category and owner.

  Just below the *Change Category & Assign* heading in the drop-down, Users will see all categories currently active within the system. Once a category is selected, a secondary drop-down will populate to the right with all Users authorized to work requests for the category. Next to each User is the number of open requests currently assigned to him/her. The default User will be indicated as well.

The User list for all categories includes the Inbox. If this is selected, the request(s) will be assigned to the designated category and returned to the Inbox. When used in conjunction with category auto-assignment (if enabled), it can serve as a means to manage workflow based on issue types.

- *Move to Inbox*. Users can elect to move a request, or groups of requests, directly to the Inbox without being required to assign to a category. However, any previous category assignment will remain.

- *Merge Requests*. (***Administrator and Help Desk Staff Levels only***). Allows for the request history of one, or more requests, to be forced into another. Users must select the requests they wish to include in the merge and use the secondary drop-down to specify the receiving request. This functionality is also available via the request page. To see how it's used there, see section 3.8.4

- *Mark as SPAM* (***Staff and Administrator Levels only***). Will flag all selected requests as SPAM and move to the SPAM filtered view for deletion.

- *Change Status*. Users can quickly change the status for a group of requests. Similar to changing categories, a secondary drop-down will populate to the right listing all available status types.

- *Close Requests*. When a group of requests do not require any further action they can be closed directly from the request grid. When *Close Request* is selected from the quick action drop-down a secondary drop-down will appear to the right, listing all active status types.

HelpSpot requires that a status type be selected every time a request is closed.

- *Batch Respond/Edit Requests* (***Administrator Level only***). This action allows Administrators to, in one step, update multiple requests.

  Batch responding is best shown with a real world example: Within a 20-minute period a support desk receives dozens of requests about connectivity issues that is determined to stem from a server outage.

  Using Batch Response/Edit, Administrators can send a message to all applicable requests explaining the situation.

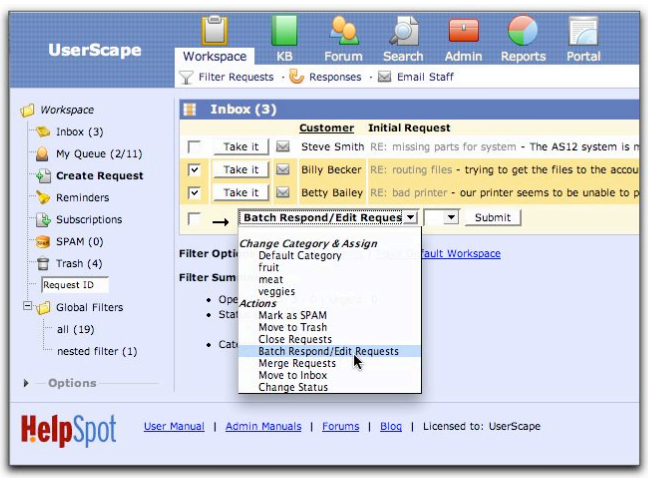


Figure 2.5: Selecting Requests For Batching

Administrators can also choose to update the status, category/assignment, or reporting tags. Individual requests can also be removed from the process by clicking the red X to the right of the request, as shown in Figure 2.6.

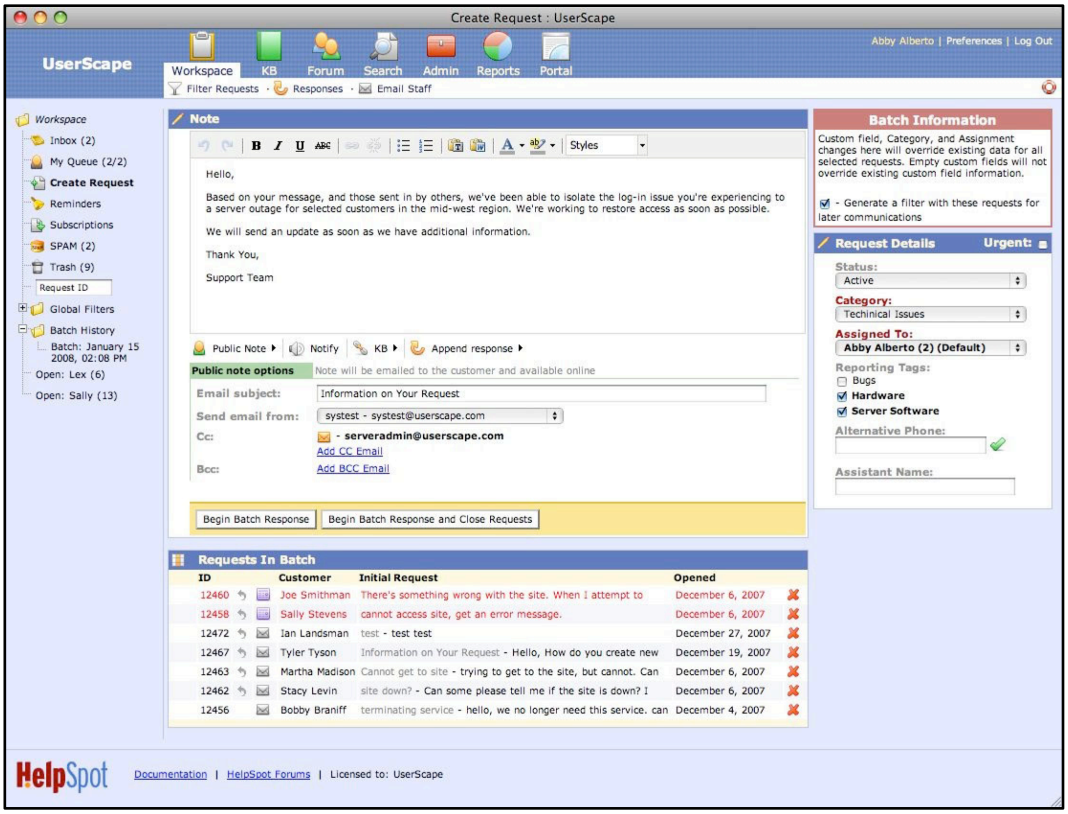


Figure 2.6: Creating a Message and Setting Request Details Using Batching

When Batch Respond/Edit is used, the User can opt to have a link to the results added to the Batch History folder on the left navigation, below the Global Filters folder, if applicable.

Using the results set in the batch histories folder, Administrators can batch again with subsequent messages, if needed.

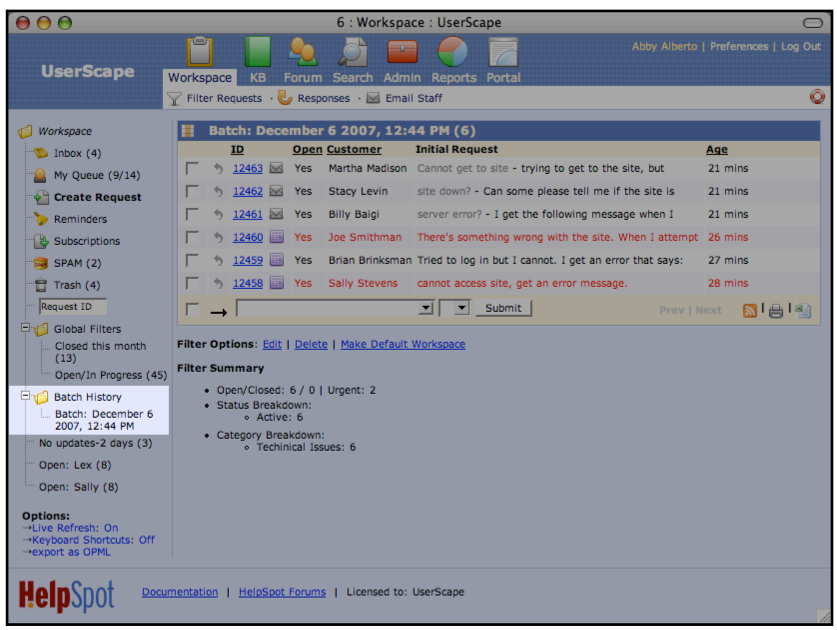


Figure 2.7: Batching Folder in Left Navigation

- *Move to Trash* (***Administrator level only***). The trash provides Administrators with a means to remove testing/training requests, duplicate requests, or any other requests that do not require action or should be removed from the system for reporting purposes.

2.3.4 Request Grid Navigation

At the bottom right of the request grid is the Pre|Next page navigation. Each page of the request grid displays 500 requests by default. When the number of requests within a view exceeds 500 it will paginate, and the navigation will become active.

2.3.5 Request Grid Options

HelpSpot provides three options for outputting request grid results.

1. *RSS*. Any view can be tracked via RSS and viewed outside of HelpSpot by any RSS reader.
2. *Print*. The request grid can be printed as seen on the screen.
3. *Export to Excel*. The request grid can be exported into Excel for further manipulation.

2.3.6 Filter Options

All filter options are just below the request grid.

Customizing Columns: Inbox and My Queue

At the bottom of the request grid in the Inbox and My Queue views is a link to Customize Columns. Clicking this link will bring Users to a page where they can use the drop-down to select and add columns. The X mark and double-headed arrows can be used to remove and drag-and-drop columns to the desired place in the display.

See Appendix A for a complete list, with descriptions, of columns.

Edit: Filtered Views

Request grids for filtered views created by the User, for their personal use, can be modified through the Edit link found at the bottom of the request grid. Once clicked, Users are brought to the filter create/edit page.

The same is true for global filters, however only Administrators can modify these filters.

See section 2.2.8 for more on creating/editing filters.

> Save time. New filters can be based on existing ones simply by editing and using Save As.

Setting Default Workspace

As mentioned in previous sections, HelpSpot makes My Queue the default view in the workspace. However, this can be modified to any view available to the User simply by clicking the Make Default Workspace link below the request grid.

2.3.7 Filter Summary

For every view there is a quick summary available below the request grid and filter options. When a view has 500+ requests each page will include an individual page summary, and not a summary for the entire view.

Summary points include:

- A count of open, closed and urgent requests
- A breakout by status, with a count for each
- A breakout by category, with a count for each

2.4 Top Navigation

Just under the Workspace tab there is a sub-navigation of workspace specific functions.

> Unlike left navigation links, top sub-navigation items load within the entire workspace and not just within the request grid area.

These actions are briefly summarized below and discussed in-depth in subsequent sections.

- Filter Requests. As described in previous sections of this chapter, filters are custom-created request views. These views can be created by individual Users, for personal use, or by Administrators for all Users (global).
  - Only Administrators can create global filters.
  - Guest level accounts cannot create or view filters.

- Responses. Responses are predefined messages that are available to Users when updating requests and/or responding to forum posts. Responses can be created to contain placeholder information that is auto-inserted (such assigned Staffs name or request ID) as well as formatted text. They allow Users to save time and more quickly respond to common inquiries without the hassle of retyping information. Responses can be User or globally available.
  - Only Administrators can create global responses.
  - All account levels have the ability to create and use responses.

- Email Staff. Users can email all or selected Staff using the Emailing Staff feature. These are for messages to other account holders (Users) that aren't related to a specific request.

2.4.1 Filter Requests: Creating Filtered Views

Filters are custom-created views of requests. Each filter has a set of criteria, defined by the creator using specific conditions that requests must meet to be returned in the results set. Filtered views can be created and saved on the User or global level.

Clicking the Filter Requests link within the Workspace tab will bring Users to the filter creation page as shown in Figure 2.8.

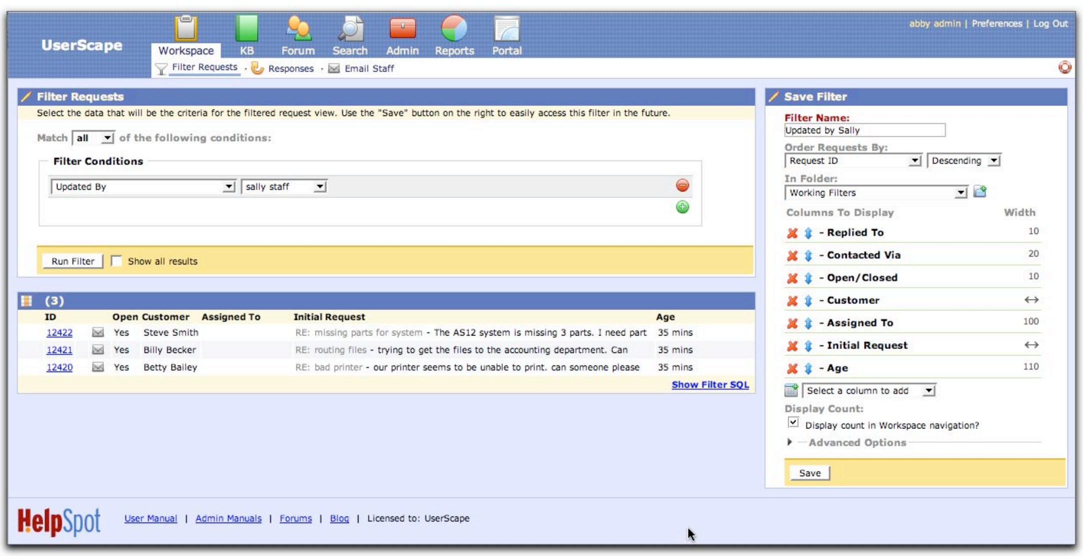


Figure 2.8: Overview of Filter Creation Page

Filter creation can be broken down into three basic steps: 1) defining conditions, 2) testing and 3) setting preferences. Let's first look at the components of each step, than put them together to work through a few examples.

Defining Conditions

When creating a filter, Users can define an infinite number of conditions, and combination of conditions, that requests must meet to be included within that view. Conditions are based on individual elements of the request, Customer, or actions taken on a request. Users must define if the requests should match *any* or *all* conditions provided for the filter.

For each condition there is a means to define the value, via either a drop-down or text field. Each condition provides an additional drop-down for selecting the operator(s) to define how the specified value is applied.

Sample operators include:

- greater than,
- less than,
- is not,
- is.

Using category and email as an example in Figure 2.9, it can be seen how Users would work through defining these conditions. Note that conditions are added and removed by using the plus and minus signs to the right of the condition definition.

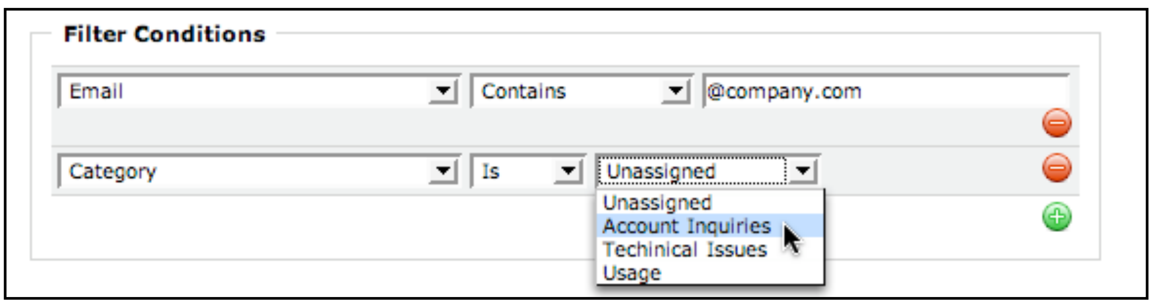


Figure 2.9: Setting Filter Conditions

For more advanced filter creation, sub- or nested groups of conditions can be created using the advanced condition of ALL/ANY of the following are true. When either is used, nested drop-downs will appear where the sub-condition group is created.

Table 2.4.1a: Filter Conditions Defined

Condition	*Definition*
Customer Information	
Customer ID	Specify by Customer ID (as entered by Staff/inserted by Live lookup)
Email	Based on Customer email address, can do partial or whole matches.
First Name	Whole or partial match based on Customer first name.
Last Name	Whole or partial match based on Customer last name.
Phone	Whole or partial match based on Customer phone number.
Request Details	

Request ID	Specify by auto-assigned ID given to each request.
Contacted Via	Select among the list of system-generated contact methods.
Status	Select among the list of status types defined by an Administrator.
Open/Closed	Filter based on whether a request is open or closed.
Is Urgent	Select requests flagged as urgent.
Category	Select from all categories (active and inactive), or requests that are not yet assigned to a category.
Portal	Select from which portal a request entered the system. Only applicable for those installations supporting multiple portals.
Reporting Tags	Select from all reporting tags.
Opened by	When looking among requests entered manually, specify the Staffer who opened them.
Assigned to	Filter based on current Staff assignment.
Updated by	See all requests ever updated by selected Staff.
Email subject	Whole or partial match for email subject based on text provided by User.
Mailbox	Select the mailbox by which the Customer inquiry initially entered. Mailboxes listed reflect those created in the Administrators area.
Custom Fields	
	All Custom fields in the installation are listed as a filter Condition. The type of Custom field determines the type of operators that follow.
Search	
Request history search for	Whole or partial match against all notes within a request (public and private; Customer and Staff) based on text provided by User.
Date and Time	
Minutes since opened	Requests that are either new or older than a specific time, relative to the current day/time.
Minutes since closed	Closed either before or after a specific time, relative to the current day/time.
Minutes since last update	Update (public or private; Customer or Staff) before or after a specific time, relative to the current day/time.
Minutes since last public update	Last public update (Customer or Staff) before or after a specific time, relative to the current day/time.
Minutes since last Customer update	Customer update done before or after a specific time (relative to the current day/time).
Relative Date Since Opened	Relative time frame it was opened. Options include: today, yesterday, this week, this month, this year, last week, last month, last year.
Relative Date Since Closed	Relative time frame it was closed. Options include: today, yesterday, this week, this month, this year, last week, last month, last year.
Request Updated	Relative time frame of the last updated (public or private; Customer or Staff). Options include: today, yesterday, this week, this month, this year, last week, last month, last year.

Publicly Updated	Relative time frame of the last public update (Customer or Staff). Options include: today, yesterday, this week, this month, this year, last week, last month, last year.
Customer Updated	Relative time frame when last updated by the Customer. Options include: today, yesterday, this week, this month, this year, last week, last month, last year.
Opened Before Date	Opened before a specified date.
Opened After Date	Opened after a specified date.
Closed Before Date	Closed before a specified date.
Closed After Date	Closed after a specified date.
Other	
Number of public updates	Specify by the number of public updates (Customer and Staff) within the request.
Last public reply from	Specify who created the last public update. Options include: Customer, any Staffer, and individual Staffers.
Advanced	
ALL of the following are true	Used when creating nested (subgroups of) conditions when a filter. Requires ALL the specified conditions within the subgroup be met in addition to those specified outside the subgroup.
ANY of the following are true	Used when creating nested (subgroups of) conditions when a filter. Requires ANY the specified conditions within the subgroup be met in addition to those specified outside the subgroup.
Custom "where" clause (SQL)	User defined WHERE clause against HelpSpot database. For advanced Users with an understanding of the HelpSpot database and SQL.

Testing Conditions

To test the condition(s), Users can hit the *Run filter* button just below the conditions box. The results will truncate to show only the first 30 requests in the results set. However, the top of the results set shows the number of requests that match the condition(s) set. To see all requests, check the *Show all Results* box prior to running.

> The results will return based on the preferences set in the Save filter box to the right of the screen. To see the results set, with the desired preferences (such as columns and sort) included, set preferences before running the test.

To view an individual request within the results set, simply click the Request ID number and a new window will open to the request page for that request.

Once a User is satisfied with the conditions set, as demonstrated through the results presented in the testing, they can move to the final steps of setting preferences and saving.

Setting Preferences

Display preferences are set for each filtered view using the Save Filter box on the right side of the screen.

- *Filter Name*. Every filter must have a name. This is the name that will be used within the left workspace navigation as well as at the top of the request grid.

- *Order Requests by*. This applies to how the requests are displayed in the request grid. Users can select a specific element within the request to sort by as well as whether the result set is returned ascending or descending.

- *In Folder*. By selecting Global Filters (only Administrators have this option), the filter will be available to all Users. Selecting My Filters will allow only the creator to view the filter. The folder icon to the right of the drop-down is used to create additional folders for organizing personal filters.

- *Set Columns to Display*. By default, HelpSpot lists seven of the commonly used columns for display in the request grid of the filter. These can be removed by clicking the red X next to each. To reorder the list, simply grab the double-headed arrow and drag up or down.

  To add columns, use the drop-down below the list to select the desired column. Once selected, it will appear at the bottom of the list and can be reordered using the double-headed arrow.

  Column width (size) can also be adjusted for display in the Workspace. HelpSpot defaults to most logical sizes based on standard, modern displays. However clicking on the value will allow you to enter the pixel size preference for the column. This is often changed for those installations wishing to see great amount of data for the column (for example, Initial Request). Those with the double-headed arrow will dynamically size correctly to fill the remaining screen space.

- HelpSpot defaults to showing the request count in the left navigation of the workspace, however this can be unchecked if desired.

- *Advanced Options*.
  - *Show Urgent Requests*. Users can select whether urgent requests are moved to the top of the request grid, regardless of how *Order Request by* is set, or if they will appear inline.

  - *Group Requests by*. Another way to change the display of requests in the request grid is to select an element for grouping by. Elements available for grouping including time (today, yesterday, hour, day, month), custom fields, assignment, and status.

  - *Key Board Shortcuts*. A shortcut key will allow Users to move from any page within the workspace directly to the request grid for that filter. The drop-down provided within the preferences allows the creator to specify which key is the shortcut for the filter.

  - Users can opt to disable this and/or limit the RSS feed to include only public notes.

  - If the filter is intended to be a work queue or alternative Inbox, Users should select to *Never cache workspace display count*.

With conditions and preferences set, and tested, the filter can be saved. Hitting the *Save* button will bring the User back to the workspace and in the results grid for the filter.

Filters in Use: Working Examples

Now that we've looked at the nuts and bolts of creating a filter, let's build views to address common business needs.

These examples show the most direct way of fulfilling the need however, because of the flexibility of filters, there may be more than one way to combine conditions and preferences to achieve the same result.

Case 1: All open requests

An Administrator needs to create a filter, only for themselves, to see all open requests and to whom they are assigned.

Conditions:

1. *Open/Close* drop-down, set to *Open*.

Preferences:

- The following column is removed from the list: *Open/Closed*
- In the Group Request by drop-down select: *Assigned To*

Filter is run and saved.

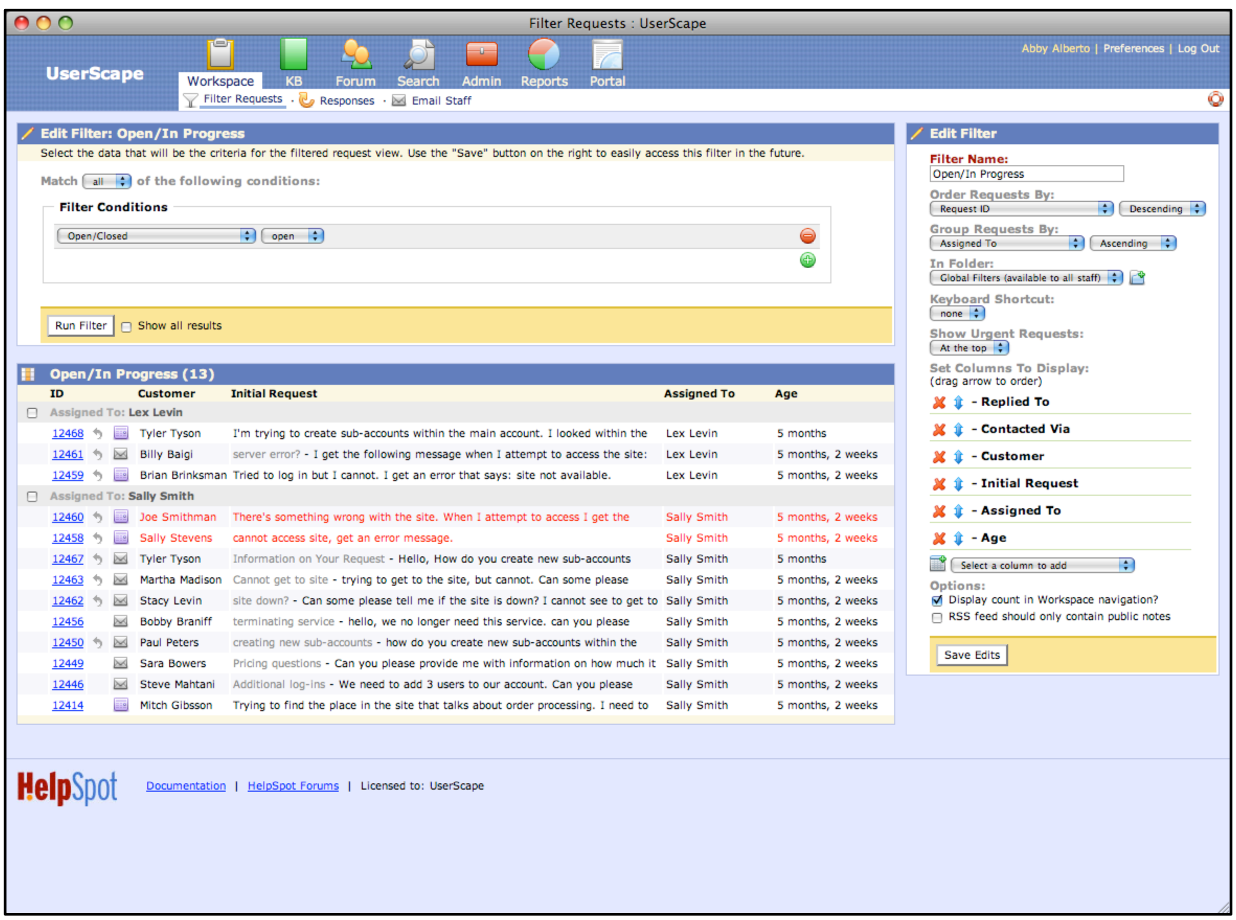


Figure 2.10: Creating a Filter—All Open Request

Case 2: Requests worked by specific Users

To access all completed and closed requests, a User builds a filter to see all of the requests they've worked and closed. As part of this filter they also want to see at a glance why the request was closed.

Conditions:

1. *Open/Close* drop-down, set to *Closed*.
2. *Assigned to* set to the Users name.

Preferences:

- *Order Request by* is changed to *Date Closed*, descending order
- *Is Urgent*, is select to inline
- The following column is removed from the list: *Open/Closed*
- The following column is added to the list: *Date Closed*
- In the Group Request by drop-down select: *Status*

Filter is run and saved.

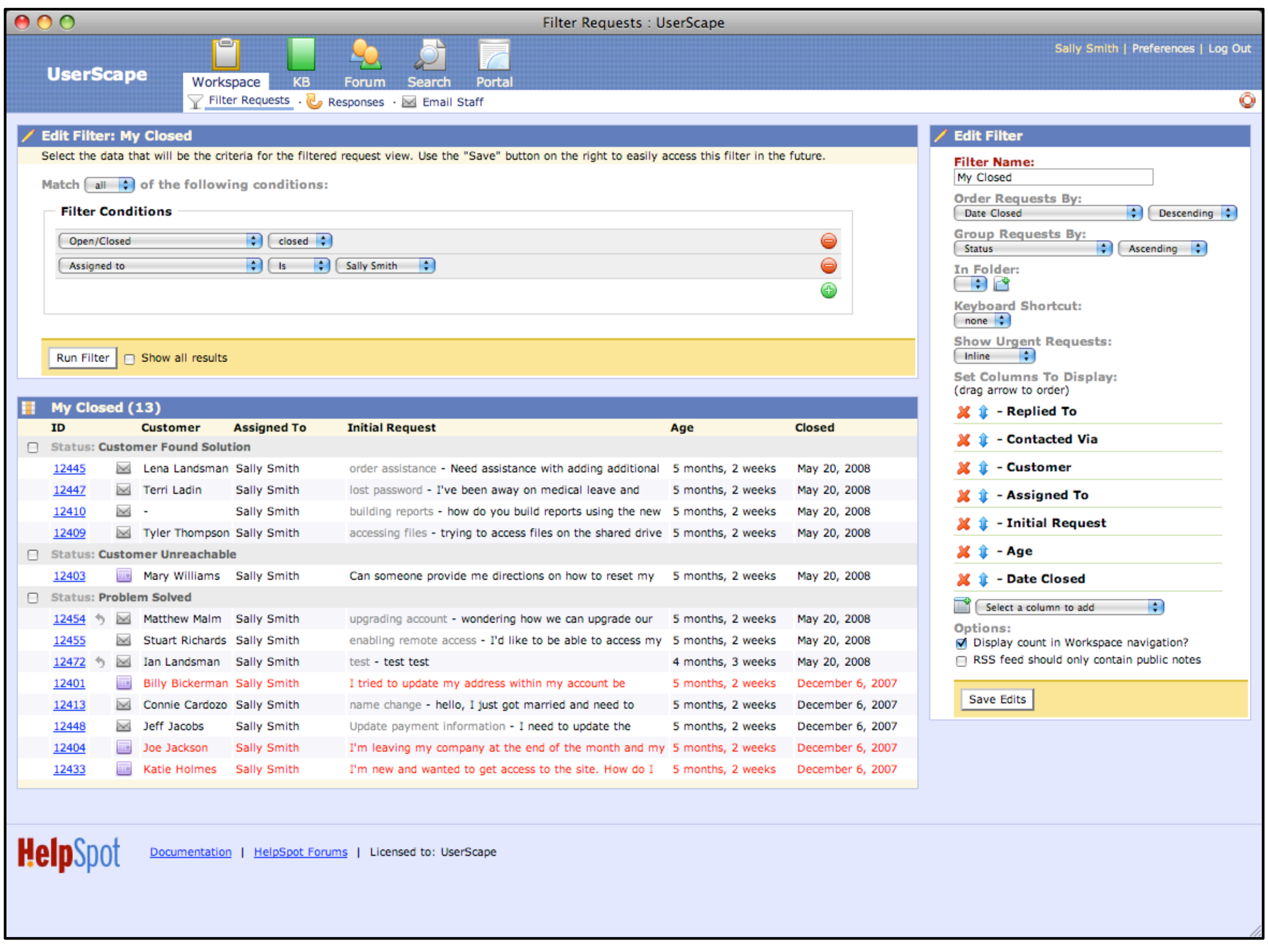


Figure 2.11: Creating a Filter—Requests Closed by Specific User

Case 3: Creating department inbox

An Administrator wants to create an alternative inbox for all requests sent in via the sales email account so three people in the Sales and Accounts department can work these requests.

Conditions:

1. *Open/Close* drop-down, set to *Open*
2. *Assigned to is set to Unassigned*
3. *Mailbox is set to the sales account email*

Preferences:

- *In Folder*, set to *Global Filters* because this filter needs to be accessible to all
- The following column is added to the list: *Take it*
- *Is Urgent*, is select to the top

Filter is run and saved.

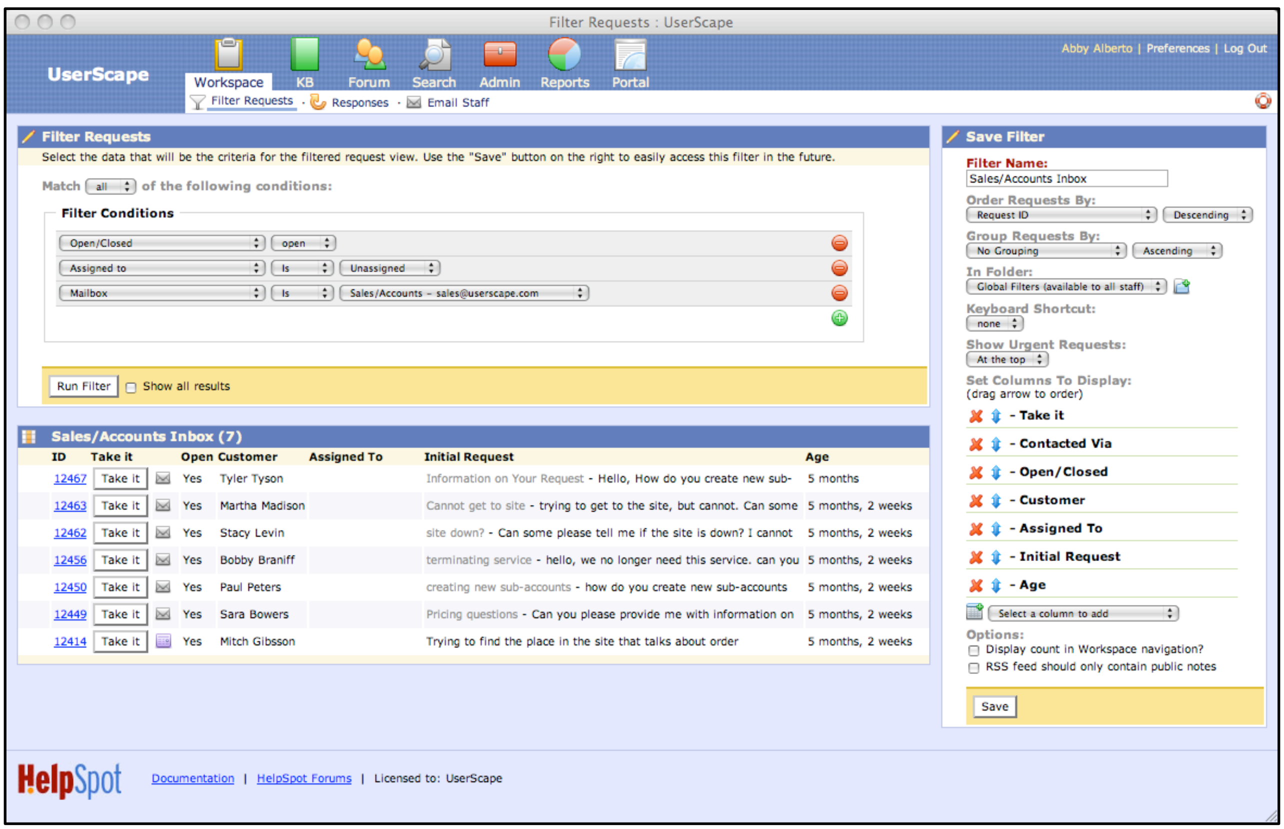


Figure 2.12: Creating a Filter—Secondary Queues by Department

Administrators Note:

Administrators must first add the mailbox (in this example, the sales email) prior to implementing this filter. This is done via the Admin/Mailboxes area of HelpSpot.

Case 4: Monitoring response timeliness

Company policy dictates all Customers must be responded to within 24 hours. An Administrator wants to create a secondary work queue for all Users to be able to see/work requests not updated within 24 hours of a Customer update.

Conditions:

1. *Open/Close* drop-down, set to *Open*
2. *Minutes since last public update* is greater than 24 hours

Preferences:

- *In Folder*, set to *Global Filters* because this filter needs to be accessible to all
- *Order Request by* is changed to *Last Public Update*, descending order
- *Is Urgent*, at the top
- The following column is removed: *Open/Closed*
- The following column is added and moved to the top: *Last Public Note By*

Filter is run and saved.

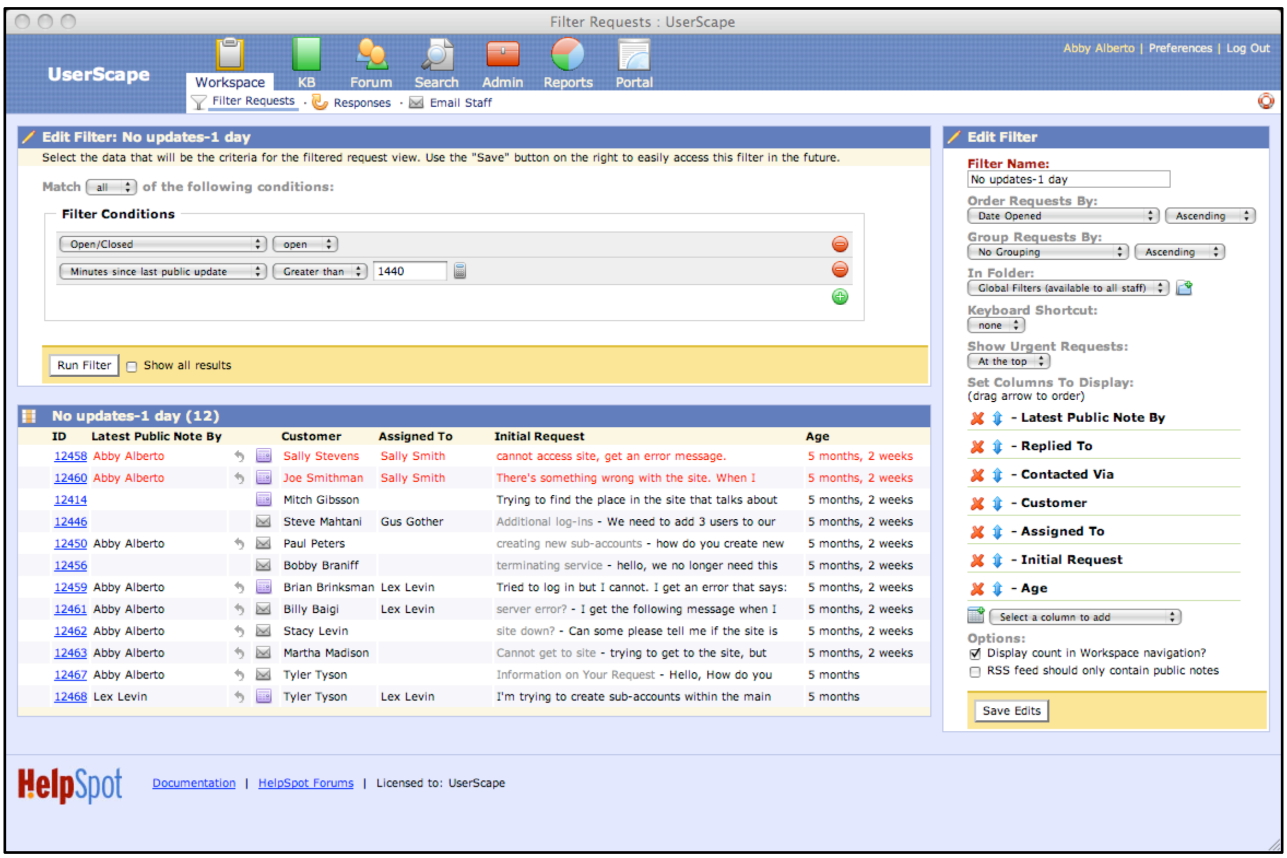


Figure 2.13: Creating a Filter—Monitoring Response Time

Usage Note:

Indicator of those that need a reply:

- The *Reply to* column, using the circular arrow, or
- *Last Public Note by*. When blank, without a Staff name listed, than the Customer was last to respond.

2.4.2 Responses

Responses are predefined messages, available to Users when updating requests and/or responding to forum posts. All account levels have the ability to create and view responses however; only Administrators can create/modify global responses.

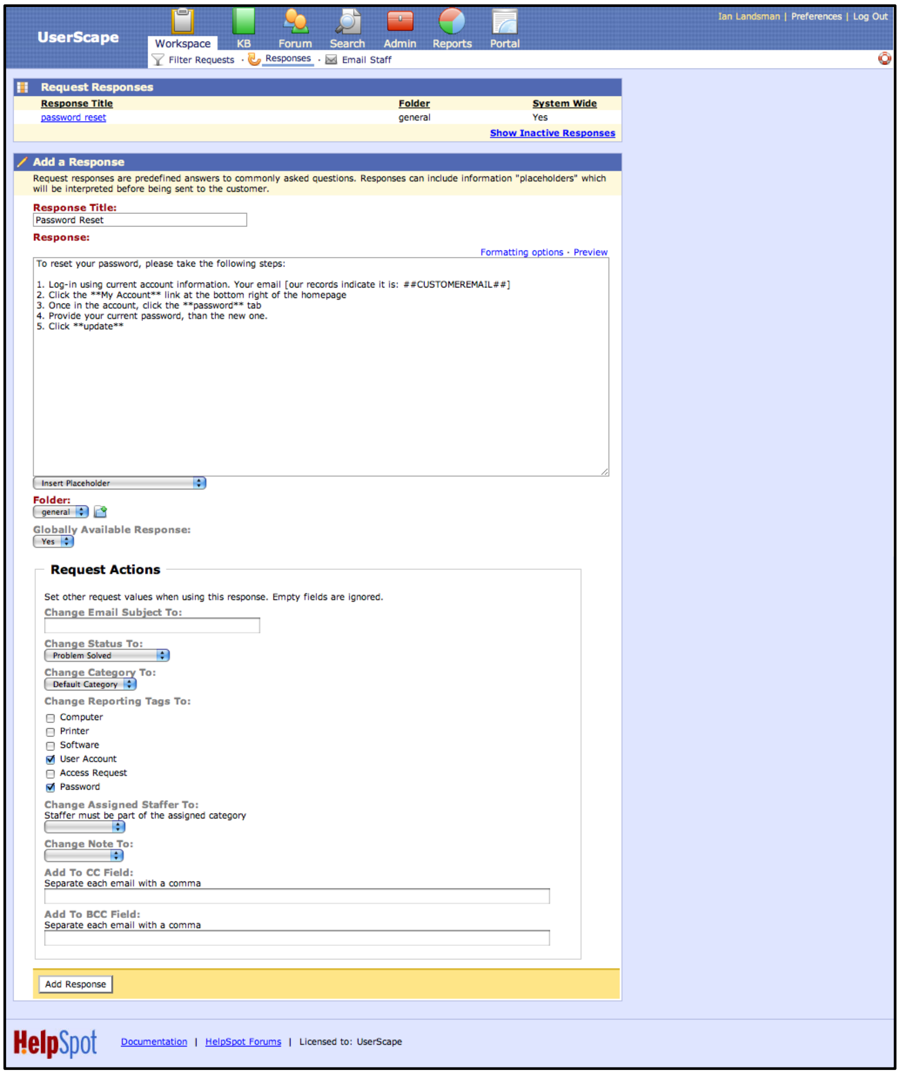


Figure 2.14: Overview of Response Creation/List Page

Responses can be created with stylized text (bolding, bulleted lists, etc.) and contain placeholder information, such as assigned Staff members' email addresses or request IDs.

Additionally, specific actions can be tied to the use of a response (ie: changing categories, status, or assignment). As with the use of the response itself, the associated actions can be a huge time saver for Staff.

Using the Responses link within the sub-navigation brings Users to the response management page. The page is divided into two sections the request response list and the *Add a response* form, as shown.

Pre-defined responses don't necessarily have to be complete responses to requests. They can be used to create a partial answer with basic information for a response (such as a link to a form) and/or for setting the corresponding action(s) (such as categories and status).

Request Response List

This section lists all active and inactive, as shown at the top of Figure 2.14. All User levels see the responses created for their own use; Administrators are the only Users that can manage system-wide (global) responses. Clicking the linked name of the response allows Users to modify it. To the right of the linked response name, the folder location and the system-wide indicator (Administrators only) are provided.

For Users that heavily depend on responses, folders can create a logical grouping of responses—preventing Users from having to navigate an unwieldy list.

Adding a Response

Let's take a look at each of the fields available, shown in Figure 2.14, when creating a response. Once the fields are completed, hitting *Add Response* will save the response and immediately make it available for use.

- *Response Title*. The name, as it will appear in the interface in both the response management page as well as on the request and forum pages.

- *Response*. Where the actual message is entered, as it will appear to the Customers in forums and/or requests. Along the top of the text box, Users will find:

  - Spell Checker (must be configured during installation)—once clicked it will check the contents of the box and highlight those words that are misspelled/not recognized.

    Clicking on the highlighted word will bring up a list of suggested changes; simply click to insert.

  - Formatting Options. In selected areas, HelpSpot uses a formatting text mark-up to modify how text is displayed to end Users. The Formatting Options link opens a window listing the characters used to format text.

    Sample Usage:
    Enter the following in the text box: **special** would display to Customers as **special**.

  - Preview. If Users wish to preview a message as they type, clicking the Preview link will load a box that shows the response, as it will appear to Customers.

Formatting Options and Preview applies for only those keeping HTML email default.

- *Insert Placeholder* dropdown. Users can included a number of auto-text placeholders in a response. HelpSpot automatically replaces placeholders with the appropriate information prior to sending.

Users include placeholders for assigned staffer first name and phone number. This will insert the first name and phone number, as listed in the Staffers preferences. Since a prepared response can sometimes feel auto-generated, staff-related placeholders are often used to reassure Customers of inquiry ownership.

See Appendix B for placeholders

- *Folder*. Responses can be grouped into folders to keep like responses together.

  To create a folder, click the new folder icon. Type the folder name and hit *save*. Once this is done it will immediately be available for use in the folder drop-down.

- *Global Indicator*. Using this drop-down, the creator can specify if the response should be available to all Users or only themselves.

- *Request Actions*. As mentioned, specific actions can be tied to the use of a response (not applicable when used in forums). One or multiple actions can be set. Available actions include changes to:
    - Email subject
    - Status
    - Category and/or selection of reporting tags
    - Staff assignment (***the staff person must be allow to work the category***)
    - Note type
    - CC field
    - Custom fields—All custom fields are available for setting.

Sample Usage:
In a response about resetting a password, Users will include the following actions: Status change to 'problem solved' and category change to 'account inquiry' and select the 'password' reporting tag.

In this example, the User is not only creating a standardized response to what is a common inquiry, but is applying actions that will categorize it correctly and change the status so the User can simply hit *Update and Close*.

Save time. New responses can be based on existing ones simply by editing and using Save As.

2.4.3 Email Staff

The email staff function allows Users to send messages to other HelpSpot account holders. These messages are not associated with a specific request and therefore are not logged in HelpSpot.

To access the email staff page, click the Email Staff link within the sub-navigation of the workspace.

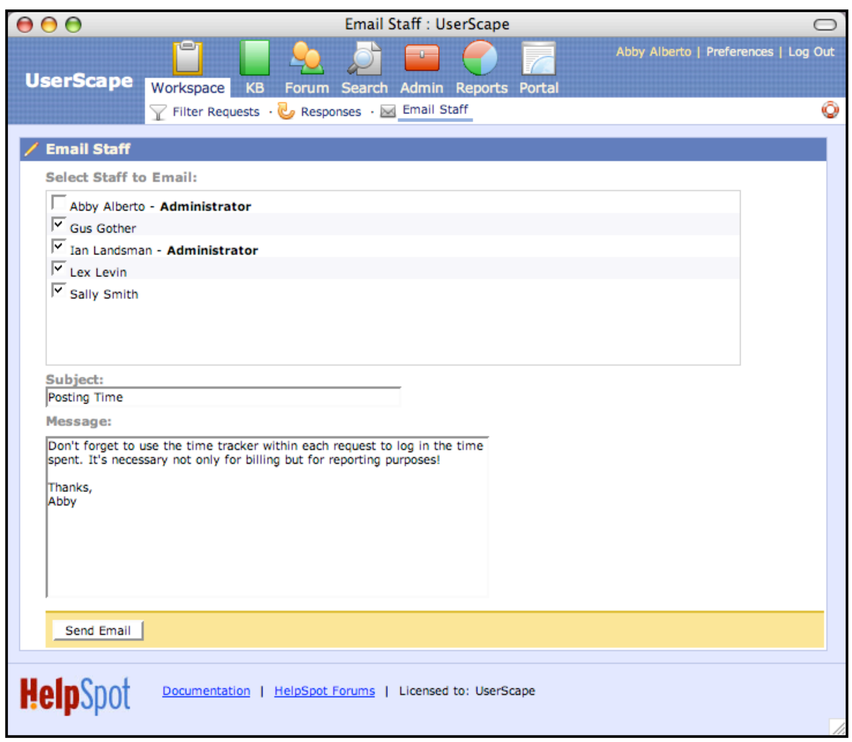


Figure 2.15: Email Staff Page

Once on the page, Users will see a very simple form. The top lists all Users with checkboxes next to each. Users should use these boxes to select those for whom they wish to receive the message. The text boxes that follow are for the subject and message. Unlike request notes and responses, there are no formatting options for staff messages. Once all fields are completed, hitting *Email Staff* to send the message.

Receiving and Responding

Messages sent via the email staff page go only to the main email address provided (email provided at log-in) and not to alternative email/SMS accounts from the User preferences.

HelpSpot uses the email address of the User sending the message as the 'From' and 'Reply to' address with all Staff recipients listed in the 'To'. Replies go directly to the email account of the sender and the conversation would be continued outside of HelpSpot, through the User’s mail client.

3 The Request Page

The request page is the Customer email, portal form submission, or phoned-in inquiry translated into a request; it's the core of individual inquiry/request management. From here, Staff can reply to the Customer, add meta-data, categorize, and assign the request. This chapter will review the actions available through the request page for the management of individual Customer inquiries.

The request page is accessible only for those with a HelpSpot account. The primary ways Users will access the request page include:

- Clicking the *Take It* button from the Inbox
- Clicking the request ID from the request grid of any view
- Clicking Create a Request in the left navigation of the workspace
- From a link in an Update email

For the purposes of understanding functionality, the request page can be divided into six main areas.

1. Time Tracker (if enabled)
2. Customer Information
3. Request Note
4. Request History
5. Request Details
6. Options
7. In-request Navigation

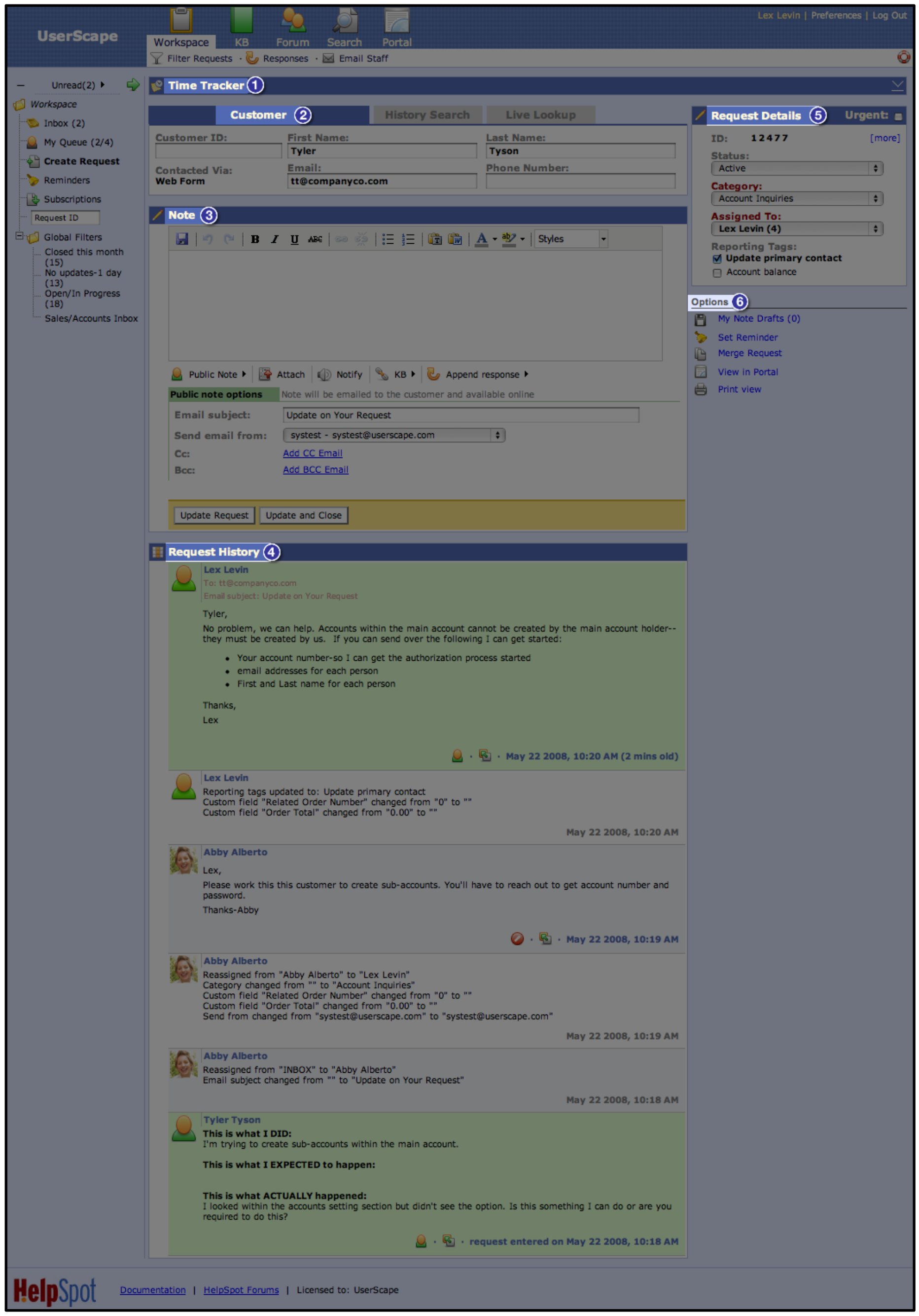


Figure 3.1: Overview of Request Page

3.1 Time Tracker

For installations with this enabled, the time tracker will be across the top of the request page. It allows each User to log the time spent on a request. Time tracking is primarily used by organizations for billing purposes.

To open, click the header and time logging fields will be displayed.

Figure 3.2: Time Tracker—Fields for Logging Time

The date and User will be pre-populated by HelpSpot, but can be modified if needed. Time is entered manually or through the use of the stop-clock. When manually entering time, decimal or standard time format (for example: 2.5 or 2:30) is accepted in the hours/minutes box. When using the stop-clock, click the arrow when work starts on the request and click it again when work is complete. The time lapsed will be logged for the entry. A field is provided to provide a brief description of the work completed during that logged session. Once Users click the *Log Time* button the time will be listed as part of the aggregate time spent on the request.

To report time logged across all requests, Administrators can run time tracking reports via the Reports tab.

3.2 Customer Information

For every request, HelpSpot provides fields for logging Customer-specific information, as shown at the top of Figure 3.3.

HelpSpot will automatically populate as much information as possible for requests initiated via the portal form or an email. For requests manually entered by Staff, the Staff member must enter the Customer information as part of the request creation process.

All Customer fields can be edited/entered at anytime; the only exception is the *Contacted Via* drop-down. This is done at initial request creation and cannot be modified at any point there after.

HelpSpot does not generate the Customer ID field. However, Users can input a Customer-specific ID (from a CRM or HRM system) for the purposes of aggregation and reporting based on Customer. This field is often used in conjunction with live lookup. See section 3.2.2 for more on using live lookup.

The email address within the Customer email field will be used for sending all public updates to the Customer.

HelpSpot also provides clickable count of all open requests for that customer (defaults to using General Search), allowing Users to quickly access other in-progress requests for this customer.

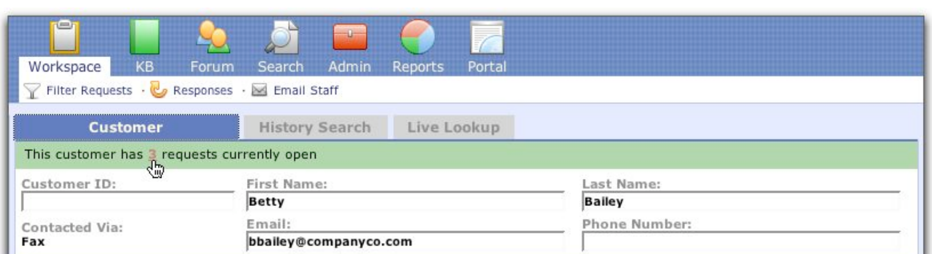


Figure 3.2a: Customer History Search

3.2.1 Searching Requests

The History Search tab in the Customer Information box allows Users quickly look-up all requests submitted by that Customer. Results are returned in an embedded window (loads in the page).

HelpSpot defaults to general search, an exact match against all Customer information (except phone), however Users have the option to change the search type to be:

- Email address
- Customer ID
- Full name
- Last name
- Email domain match (useful for finding requests submitted by Customers from the same company)

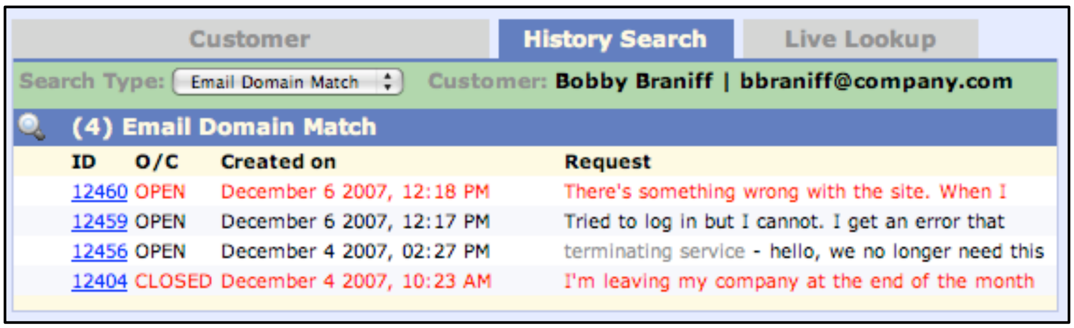


Figure 3.2.1: Customer History Search

Clicking the ID of any of the requests in the results set will load the request within the results window. From here Users can opt to insert the Customer information into the current request or simply go back to the results set. To go back into the current request to continue working, Users simply click the Customer tab.

3.2.2 Live Lookup

Live lookup allows HelpSpot to communicate with an external database (or other system that stores Customer data, pertinent to the support staff desk). Its power is it provides real-time display of data from external systems within HelpSpot, ensuring Customer information and custom field data is always accurate.

Sample uses include looking up/inserting: contract status, Customer locations, or passwords.

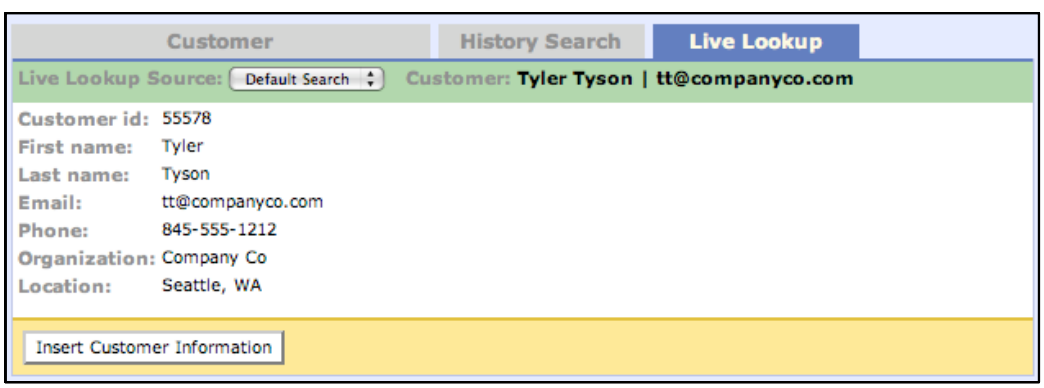


Figure 3.3: Live Lookup in Action

Functionally, the following reflects the basic workflow once a User clicks the circular arrow icon:

- ↓ HelpSpot sends all Customer information and custom field values to a script written by an Administrator (or other technical support person within the company).
- ↓ The script will look up the Customer information and compare it to what they have stored in the pre-defined system/database. (Example: Active Directory).
- ↓ Customer information is returned and HelpSpot displays the results in an embedded window. If multiple matches are found, a list will be returned to the User for selecting the correct one.
- ↓ With the correct Customer selected, their information (and any specified custom fields) can be inserted into HelpSpot.

3.3 Request Note

The request note area is where all the communication around a request occurs: with Customers, between Staff, as well as with outside resources. Users have formatting capability and options to create clear and detailed messages for the intended reader.

All notes are logged and shown as part of the request history so any User can become apprised of the work completed on an inquiry.

See section 3.6 for more on the request history

HelpSpot offers two formats for creating/sending updates via email: HTML (via visual editor or formatted text) or plain text.

3.3.1 HTML Formatting

HTML formatting can be done in one of two ways—via a visual editor or formatted text. Both provide the same end-result yet require Users to apply style in different ways.

Visual Editor (WYSIWYG)

HelpSpot defaults to sending/receiving HTML emails; so 'out of the box' Users will see a formatting tool bar across the top of the note box to support the sending of HTML emails. This tool bar functions similar to formatting tool bars in Microsoft Word and includes a spell checker to the far left (if enabled during installation). To format text, type in the box, highlight and click the desired formatting option.

Formatted Text

For installations with formatted text enabled, HelpSpot uses a formatting text mark-up to modify how text is displayed. Formatting covers the basics most Users would need for a note such as bolding, underlining, linking, and bulleted lists. HelpSpot converts the mark-up into HTML once the User submits the update.

To apply the formatted style, Users must type the designated characters. For example, to bold the word **PASSWORD** a User would have to type the following in the note box: **PASSWORD**.

The Formatting Options link, shown in Figure 3.4, opens a window listing the characters that must be used to achieve the various formatting effects and serves as a reference when applying styles.

Using the Preview link at the top right of the note box, Users can preview the message, as it will appear in the email.

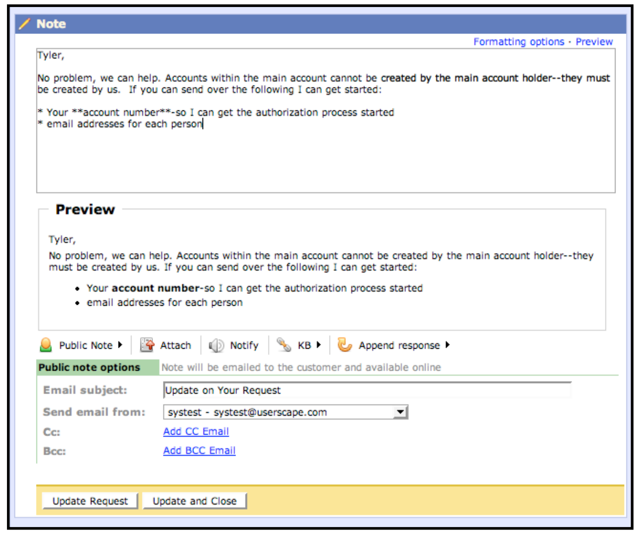


Figure 3.4: Using Preview with Formatted Text

Administrators that want the benefits of being able to send stylized messages but are concerned about the potential complications of using a visual editor typically opt for the formatted text mode.

3.3.2 Plain Text

Administrators can opt to prohibit any formatting and only allow plain text notes to be created/displayed. In which case none of the text formatting options described above will exist and Users will be dependent on only what can be done via the keyboard.

The balance of the request page chapter will be reviewed assuming the default, HTML/visual editor mode.

3.4 Note Types and Options

Users can opt to create different note types depending on the targeted audience.

As we review the note types, keep these key HelpSpot principles in mind:

- Customers receive email notices only when a public note is used.
- All note types are logged within the request history.
- The assigned Staff person receives an email when other Staff person updates the request.
- HelpSpot appends the request ID to every outgoing message for the logging replies in the request history.

HelpSpot auto-saves notes every 30 seconds and allows Users to apply saved drafts prior to submitting. See section 3.8.1 for more information.

3.4.1 Public Notes

These notes are used to provide the Customer an update on their inquiry. Public notes are:

- available to Customers via the portal, and
- are emailed to the Customer (via the email in the Customer information box).

CC/BCC Options

Others, outside of the Customer or Users, can also receive a public note. Those individuals should be listed within the public notes options area as a CC or BCC.

Figure 3.5: Using CC/BCC Options with Public Notes

To add a recipient, click the Add a CC Email or Add a BCC Email, type the recipients email address and click Add.

When an email address is added, the recipient will continue to be included on all public updates until the address is removed. To remove the email address, simply click on the email icon next to the address.

As part of the public note options there are fields to modify the email subject and change the *sent from* email address. Users may find modifying the subject is an easy way for recipients that aren't familiar with the issue to understand the contents of the message they received.

Modifying the email subject doesn't mean you lose the interaction in HelpSpot. Because HelpSpot auto-appends the request ID to all subjects of outgoing emails, any responses will be correctly logged within the request history.

3.4.2 Private Notes

Staff may want to make a note on an action they took toward addressing a request, such as: making a phone call or leaving a note to the assigned staff member. In such cases, the private note should be used. These notes are logged within the request history however, no email is sent to the Customer (nor is there an option to send the note via CC or BCC).

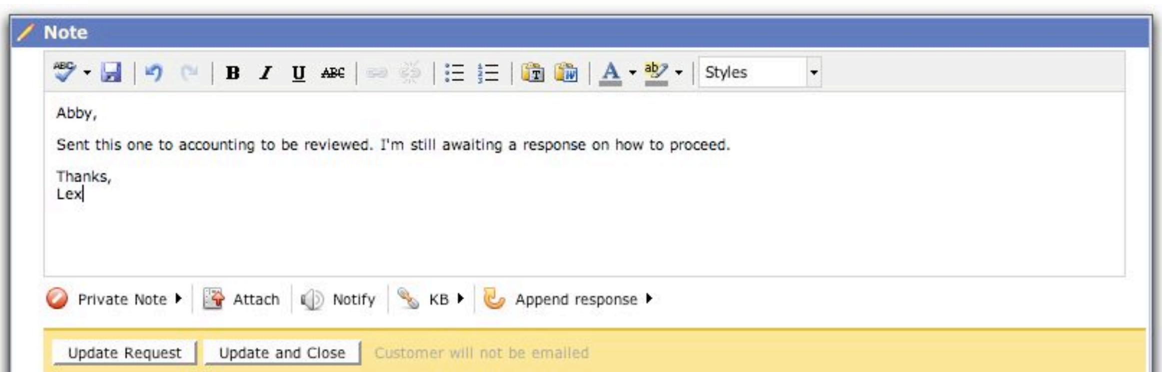


Figure 3.6: Creating a Private Note

An email will be sent to the assigned Staffer when another User adds a private note.

The Saving Draft message in the top right of the Notes area shown in Figure 3.6 indicates a draft of the note is being saved. For more on using saved drafts, see section 3.8.1.

3.4.3 External Notes

When working through a Customer inquiry, Staff may have the need to reach out to resources that do not have HelpSpot accounts. For example, a Staff member may need to contact an external vendor to further research a specific Customer issue.

The external note capability allows Staff to work with the necessary resources while still having the entire interaction logged within the request history. Customers do not receive email updates when an external note is used; only the specified recipients will receive the message when an external note is created.

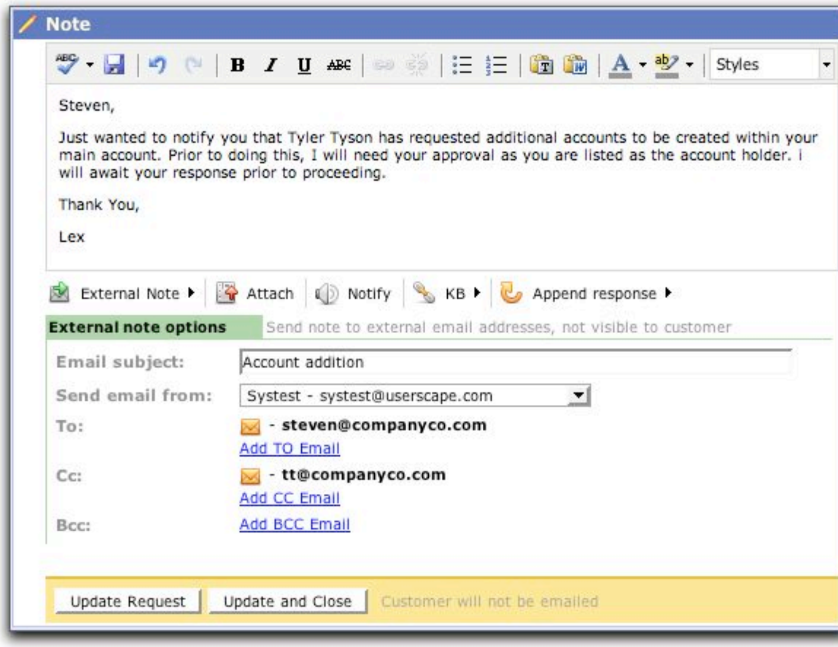


Figure 3.7: Creating an External Note

If the assigned Staffer didn't create a note, they will receive an email notification.

To/CC/BCC Options

The external note options are the same as the public note options. However, there is an inclusion of a *To* field where Staff provide the recipient(s) email. Optionally, they can provide CC or BCC email address in addition to modifying the *sent from* email address. As with public notes, the subject can be modified to be more appropriate for the targeted reader(s).

3.5 Global Note Options

A few options can be used for all note types. These options are listed after the note type drop-down and include:

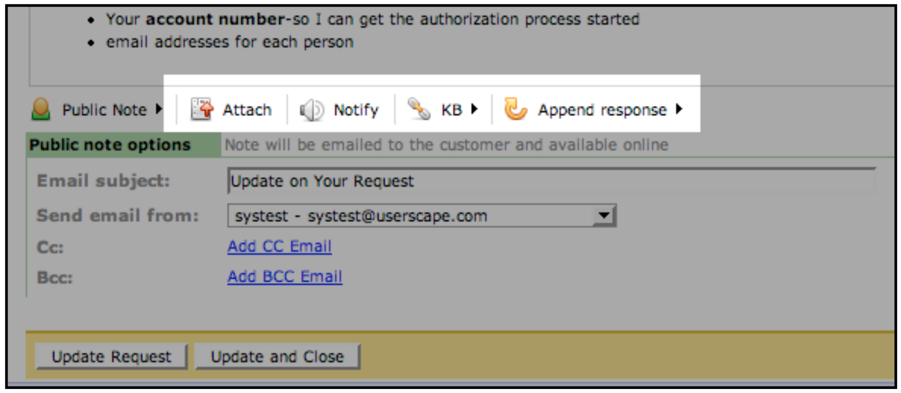


Figure 3.8: Note Options Menu

- *Attach*. Attach a file to send with any note. File types and sizes are not limited by HelpSpot.

- *Notify*. Include any HelpSpot User as a recipient to a note. The message will be sent via the preferred communication method set in User's preference.

See chapter 0 for setting user preferences

- *KB*. Insert a link to a knowledge book page in a note. When Users click the KB link they will see a list of all public knowledge books. Once the desired book is selected, an outline of all chapters and pages will be shown. From here a User can opt to preview the page prior to inserting the link or simply click the page name to insert a link to the page.

- *Append Response*. As covered in section 2.4.2 , Users can create prepared responses for quick use by Staff when responding to the more common inquires. To apply these responses, Users can click the Append Response link to see a list of response, than click the response title to insert the response text as well as apply any related actions.

3.6 Request History

Every action completed on a request is logged within the request history, shown in Figure 3.9. Actions can range from a note to the Customer to the logging of request detail changes.

Logging all interactions enables any User, at any time, to become current on the happenings within a Customer request.

Figure 3.9: Request History

Clicking the **Showing** menu at the top of the Request History allows Users the option to filter history by: Full History, Only Notes, Public Notes, or Files.

3.6.1 Individual Entries Up-Close

While the actions that create the entry may vary, the basic look and feel of all entries remains the same.

HelpSpot includes the following in every entry type:

- Time/Date Stamp of action
- Clear label of entry type (ie: Public/Private/External Note or Event Log)
- User name and photo, if available, for all User-generated actions
- Message recipients, when applicable
- Message, when applicable
- Description of request detail change, when applicable

The following actions can be taken on each history entry via the Menu link:

- Quote a previous entry in a new note
- Change note status to public or private (excluding system-generated entries)
- Convert an individual entry into it's own request
- Generate a direct link to this entry. Handy for sending to another User for quick review.

Across all entry types, images attachment are embedded within the request history for ease of viewing. For all other file types, there will be a link for downloading.

3.7 Request Details

The request details area contains the information necessary to manage the working of the request as well as the data to classify the request for reporting or automated processes.

Figure 3.10: Request Details Area

Requests can be marked as Urgent. Within the request details header is an Urgent checkbox. Once selected, the header color will change to being red, as shown in Figure 3.10.

HelpSpot defaults urgent requests to the top of all request grids.

Below the header Users will find the request ID and a link for the access key and customer portal password. The request ID is what Users will use to look up requests within HelpSpot. This differs from Customers, who will look up the individual request in the portal using the access key. When customers wish to access all their requests, on one screen, they must login using their email and password.

See section 8.2.1 for more on the Customer Portal

3.7.1 Status

Users have the ability to assign a status to a request. A status assignment can reflect a milestone in the resolution process, including what led to the closure of the issue. For example, HelpSpot provides the following by default: active, problem solved, Customer found solution, Customer unreachable, and software bug.

To close a request, Users must select a status type other than Active.

HelpSpot comes by default with a few status types to get Users started however; Administrators can customize the list of status types.

3.7.2 Category

On a very basic level, categories are used in HelpSpot to group-like requests together. This grouping can range from defining the nature of the inquiry to specifying the work group/department responsible for resolution. HelpSpot's flexibility allows organizations to best define the function that the category assignment serves.

Beyond just a simple label, each category defines the types of meta-data collected for a request by tying request assignment, reporting tags, and custom fields directly to the category.

Appropriate category application, in conjunction with the meta-data collected, can provides help desks with a framework for workflow management.

Assigned To

Administrators must define the Users that have access to work requests within a specific category. Once this is done, Users will see on the request page a list of Staff to which a request can be assigned. This list will always contain:

- The default contact for the category,
- The Inbox as an assignment option. This means it will go to the Inbox and be available for anyone to take, and
- A count next to each Users name of how many requests are currently opened and assigned to them.

To select a Staff member, Users should use the dropdown to navigate available Staffers. Assignment is immediately applied as soon as the request is updated (via the *Update Request* or *Update and Close* buttons).

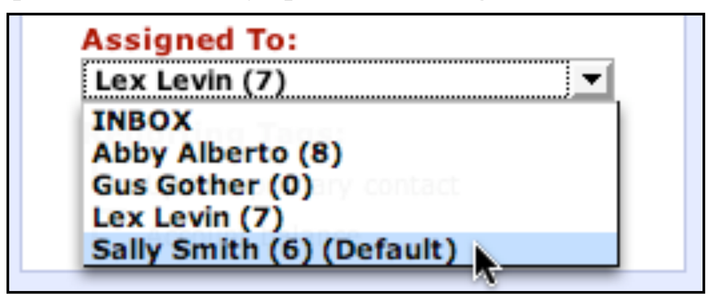


Figure 3.11: Assignment Drop Down

Uses for Assigned To

Assignment is the cornerstone of creating a request workflow. Once assignment is selected and submitted, the request will move to that User's My Queue and be flagged as unread for them to work.

> More advanced workflows may incorporate automation rules to move the request through various Users based on specified milestones/criteria.

Assignment can also be the basis for generating:

- Reports—monitor activity by User.
- Filtered Views—quickly navigate to requests based on assignment.
- Automation Rules—perform various actions based on request assignment.

Reporting Tags

Within each category an additional level of classification is available via the reporting tags. The selection of a value within the category drop-down will determine the reporting tags displayed.

Users can select as many reporting tags as applicable for the request by click the checkbox next to the tag. When the *Update* or *Update and Close* buttons are clicked, the tags will be applied to the request and logged within the request history.

At anytime reporting tags can be un-checked when no longer applicable.

> Because HelpSpot ties reporting tags to the categories, when a category changes, any reporting tags selected under the previous category will no longer apply and new tags must be selected.

Uses for Reporting Tags

Because they are collected in a consistent fashion for each request, reporting tags can be used to create:

- Reports—monitor requests by an additional level of classification.
- Filtered Views—quickly navigate to requests that contain specific reporting tags.
- Automation Rules—perform actions based on an additional level of classification within the request.

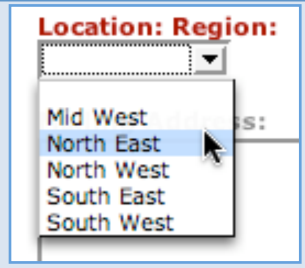
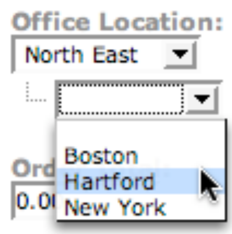
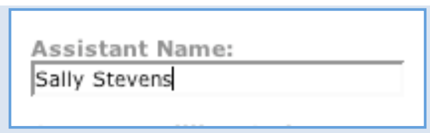
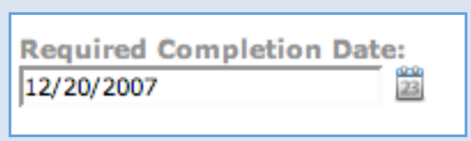
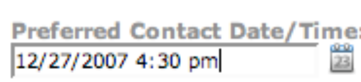
Custom Fields

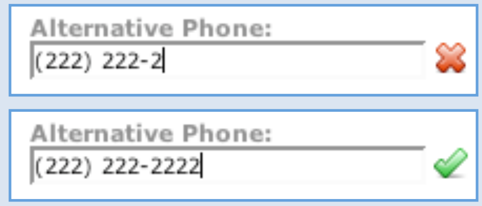
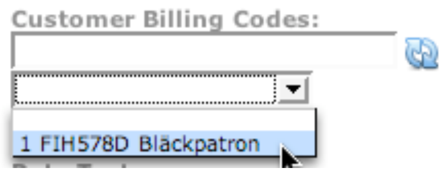
Custom fields represent custom meta-data that can be collected for a request. There are 11 types of custom fields available to Administrators for creation. These data field types can be used in a various combinations to collect the information necessary for meeting specific business requirements.

In addition to showing custom fields on the request pages for Users, Administrators can also make selected fields available to Customers via the portal web form (note: not all are available in the portal). In these cases, a custom field that is populated by the Customer will be displayed to the User on the request page.

The following table defines all the types of custom fields available to Administrators and a sample of how each would appear to Users on the request page.

Table 3.7.2 a: Custom Field Types Defined

Field Name	*Description*	*Sample on Request Page*
Drop-down	Provides a drop-down list of Administrator defined items.	
Drill-down list	Provides multi-tiered drop downs.	
Text	Best used to capture short text. Character limit is 255.	
Large Text	Best used to capture longer chunks of text.	
Date	Calendar look-up allows for the capture of a specific date.	
Date and Time	Calendar look-up allows for the capture of a specific date and time.	

Regular Expression	Administrators can use Regular Expressions to verify text input.	
AJAX Selection	Drop down list populated from a server-side script	
Checkbox	Create simple yes/no field.	
Numeric	Capture numeric values.	
Decimal	Capture numeric values that include decimal points.	

Custom field values are applied to the request as soon as the *Update Request* or *Update and Close* buttons are clicked. Custom field changes/updates are logged in the request history.

If a category changes, any custom fields selected under the previous category will no longer apply unless included as part of the new category.

Uses for Custom Fields

Because they are consistently collected for each request, custom fields can be used to create:

- Reports—monitor requests by key indicators as defined by Administrators, not HelpSpot.
- Filtered Views—quickly navigate to requests that meet values specified in custom fields.
- Automation Rules—perform actions on requests based on organization-specific information.

3.8 Request Options

This area, shown in Figure 3.12, contains all actions that support the management and working of Customer requests.

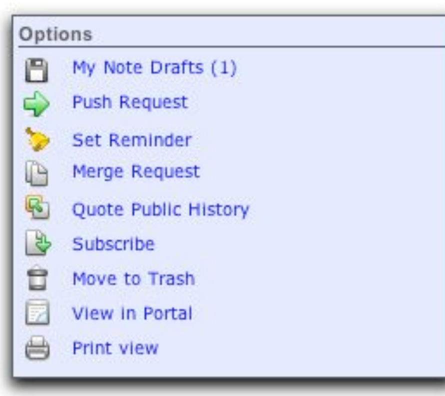


Figure 3.12: Request Options

3.8.1 My Note Drafts

Every 30 seconds Helpspot auto-saves the message in the note box with a date/time stamped draft. Users can opt to manually save at any point as well by using the save button/link in the top of the notes box. Using the drop-down as shown below, Users can easily revert to any prior version of the message.

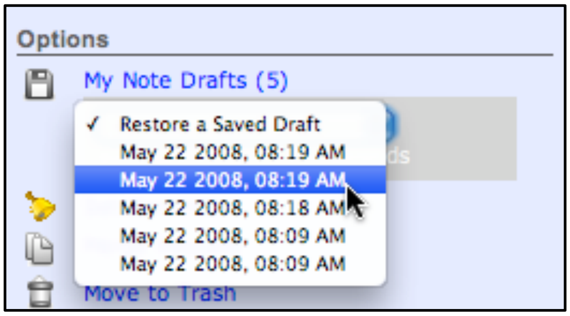


Figure 3.8.1: Applying Saved Note Drafts

Once the request is updated and/or closed all User drafts are deleted and no longer available.

3.8.2 Push Request (must be enabled)

HelpSpot has an extensive API that allows Users to push individual requests to other applications such as a CRM, bug tracker or Intranet. For Users, this is simply done by pushing the Push Request link, as shown in Figure 3.13.

The ability to use the function is dependent on configuration by an Administrator.

Figure 3.13: Push Request in Action

3.8.3 Set Reminder

For every request, a reminder can be set for future follow-up. By clicking the Set Reminder link a window will open showing the following:

- Text box for writing a reminder note,
- Calendar for selecting the date/time the reminder will be sent.
- List of all active Users with checkboxes next to each for selecting those included.

Once set, Reminders are emailed and found under the Reminders area of the workspace for included Users.

See section 2.2.4 for more on reminders in the workspace

Reminders are never sent to a Customer and are not logged within the request history.

3.8.4 Merge Requests (Administrator and Help Desk Levels Only)

Only Administrators and Help Desk Level Users will see the Merge Requests link, giving them the capability to force the request history of one request into another. This is often used when multiple requests are created for the same Customer regarding the same inquiry.

Clicking the Merge Request link will open a box where the request ID of the receiving request is entered. Once entered a window will confirm the merge.

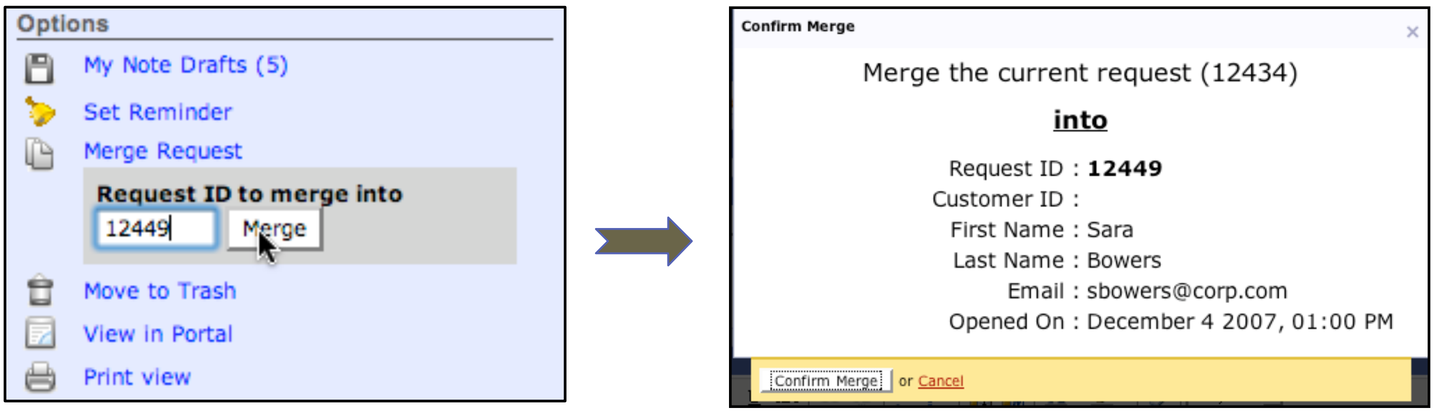


Figure 3.14: Request Merge in Action

Once the merge is complete, the User will be brought to the request page for the receiving request. The individual request histories of the merged request are inserted in chronological order within the receiving request. All merged histories are clearly identified, allowing you to retain an accurate account of all interactions.

Any responses to the original request are automatically routed to the newly created, merged, request.

3.8.5 Quote Public History

There maybe times when working with an external note where there's need to see the entire public history (the log of all interactions with the Customer). Using the Quote Public History link will insert only the public history entries into the Note box.

3.8.6 Subscribe

Users can follow changes made to requests that aren't assigned to them by opting to subscribe to a request.

To subscribe to a request, simply click the Subscribe link. Once clicked, the page will reload with an Unsubscribe link, as shown below. Unsubscribe can be used at any point to stop receiving update notifications.

When subscribing to a request, Users will receive an email notification for every update made to the request. The subscriptions area of the workspace is where Users will find a list of subscribed requests for viewing/management.

See section 2.2.5 for more on subscriptions in the workspace

3.8.7 Move to Trash (Administrator Level Only)

Only Administrators see the Move to Trash link, giving them the ability to trash a request from the request page. Most commonly used for testing/training requests, it can be used to address any request that does not require action and should be removed from the system.

Once moved into the trash from the request page a message will appear at the top of the request page notifying you the request is current in the trash and the trash link under options will be updated to Remove from Trash.

See section 2.2.7 for more on trash

3.8.8 View in Portal

This link will open another browser window to show how the request appears to the Customer via the portal. Remember, the portal will only show Customers public notes and notes they created.

3.8.9 Print View

The Print View link will provide Users with a printer-friendly view of the request in another browser window. The print command within the browser tool bar can be used to print.

3.9 In-request Navigation

When a filtered view (including inbox and workspace) has more than one request, Users can easily navigate between requests through the use of the arrows at the top of the left navigation area. This eliminates the need to go back to the workspace to enter the next request.

While the green arrows allow Users to move through a filtered view, in a linear fashion, the Unread link brings up a list to move directly to a specific request.

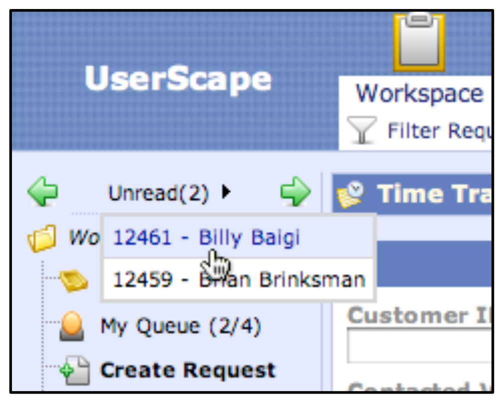


Figure 3.15 In-Request Navigation

4 Searching

HelpSpot provides Users with a several different ways to find requests within the system. Each method is optimized to find the single-specific request, or group of requests, a User is looking for.

4.1 Within the Workspace

There are two search methods available in the workspace:

- *Search field in left navigation*. Simply type in the request ID and hit return to be brought directly to the request page for that request.

- *Filters*. While filters are primarily created and saved for repeated use, they can be used for a quick one-time search to locate a particular request that meets a specific set of criteria.

See section 2.4.1 for creating and managing filters

4.2 From the Search Tab

User can additional conduct searches from the Search tab, located along the top navigation.

Within the Search tab there are two search types available:

- *Data*. Search within all requests, knowledge books and forums for a particular word or phrase.
- *Customer History*. Search all requests for ones that contain specific customer information.

4.2.1 Data Search Tips

The syntax used in the example applies to MySQL. Other databases vary; so check the syntax of your database within the data search tips on the Search page.

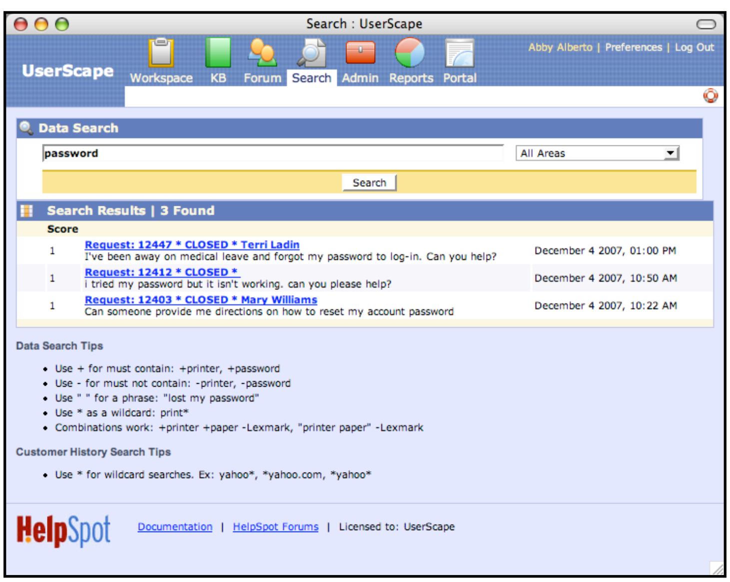


Figure 4.1: Data Search—Sample Results Set

- When doing full text searches Users can specify whether a particular word should be included or omitted.

Sample:
To find all mentions of printers, but not Lexmark, the following would be entered into the search box: +printer, -lexmark.

- Wildcard searches can be used. Wildcard searching is when an * is used preceding or following a word to return results that match the word, despite having varying text around it.

Sample:
pric* will return requests, forums, or knowledge book pages containing all forms of the word price (price/pricing/prices, etc).

4.2.2 Customer History Searches: Using Wildcards

To maximize search capability, remember to use wildcards.

For example, to find all requests submitted from a particular domain (ex: abccorp.com). In the email address search field, simply type *@company.com, and all requests from that domain will be returned.

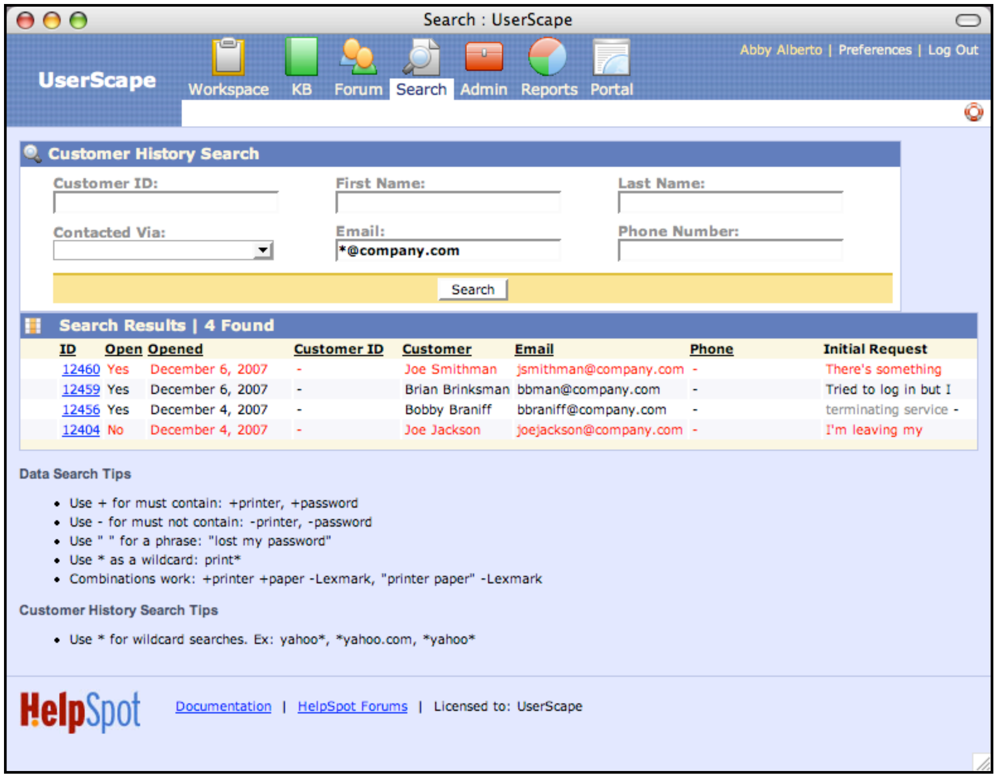


Figure 4.2: Customer History Search—Sample Results Set

5 Forums

HelpSpot's forums allow you to create an engaging, self-service community where Customers and Staff can contribute to the collective knowledge of your products/services.

Forums have a hierarchical structure. At the lowest level there are posts, where readers will put their questions and/or comments and other readers will respond/comment. Posts can be thought of as individual thoughts submitted by readers, which collectively roll-up into a topic. These grouped thoughts, or topics, in turn roll-up into the larger structure of the forum.

Throughout this section reference will be made to both public and private forums; the differences are highlighted below.

- **Public**. Intended for Customers and/or Staff interaction. These forums are available via the portal and through the Forums tab within HelpSpot (by Staff only).

See section 8.4 for more on forums and the portal

- **Private**. Intended for Staff only. These forums are accessible only via the Forums tab within HelpSpot.

With a basic understanding of forums, let's look at how forums are viewed and managed in HelpSpot.

5.1 Navigating the Forums Area

Users logged into HelpSpot can access all forums and forums management options via the Forums tab.

As shown in Figure 5.1, the landing page within the forums area is broken into 4 sections.

- The top of the page shows Users the newest 15 posts as well as topics in both public and private forums.
- The bottom of the page lists all forums allowing Users to click any forum for a complete list of topics.

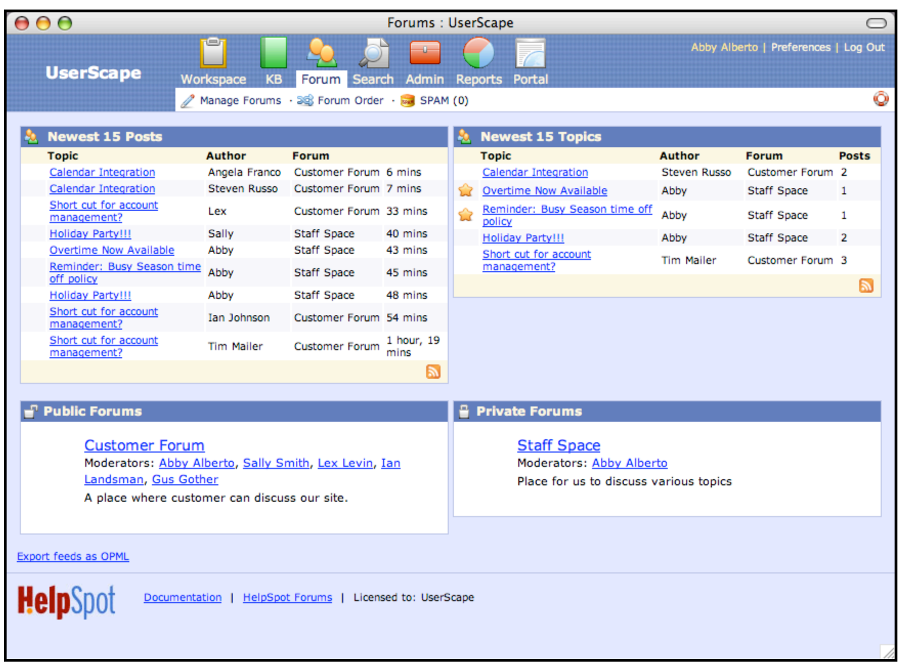


Figure 5.1: Accessing Forums in HelpSpot

Clicking through either section will bring Users to the topic page that lists all posts within the topic. From here Users can opt to reply, manage the post, and/or turn an individual post into a request.

5.2 Forum Management and Creation

Forums are managed and created through the Manage Forums link in the sub-navigation of the Forums tab. The top of the page lists all pubic and private forums that an Administrator can manage. Just below that is the *Add a Forum* form.

Administrators are the only User level that can create and manage forums.

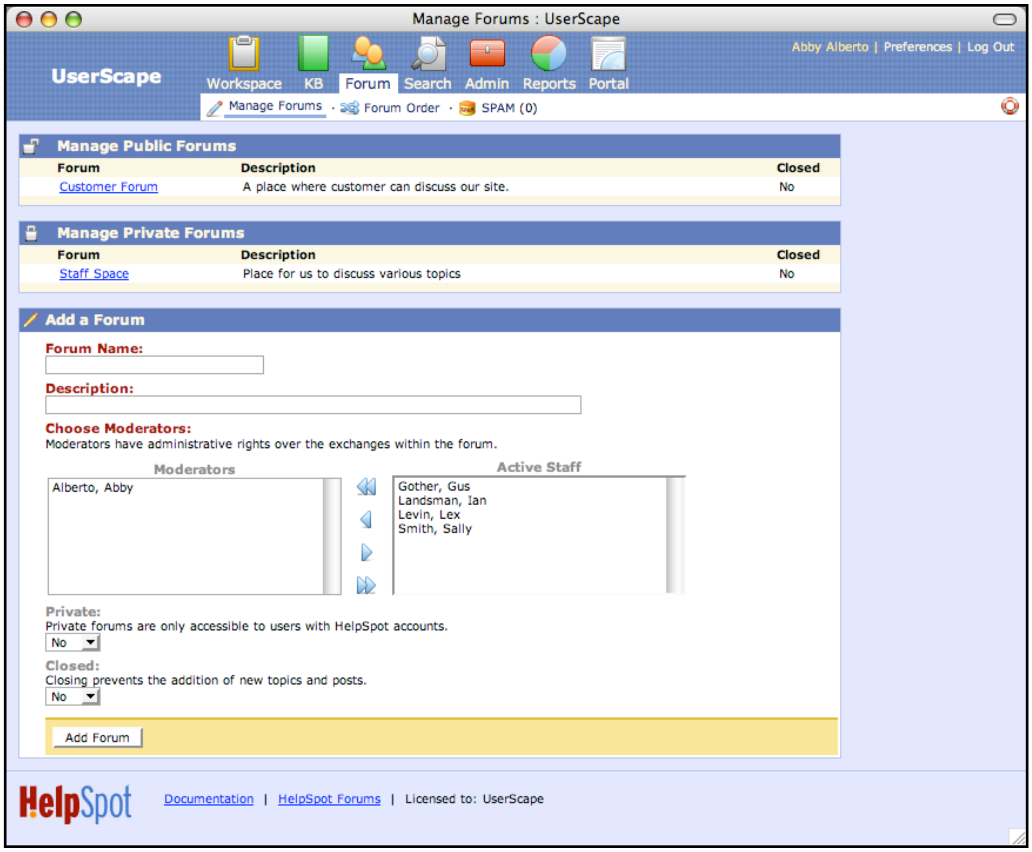


Figure 5.2: Forums Management Area in HelpSpot

5.2.1 Creation

Using the *Add a Forum* form, Administrators can designate the proprieties of a newly created forum. Each property within the form is outlined below.

- *Forum Name*. Required.
- *Forum Description*. Required; provides readers with an understanding of the topics for discussion.
- *Choose Moderators*. Required; all User levels are listed and available to be selected using the right/left arrows.

See section 5.8 for Moderator capabilities

- *Private*. Allows Administrators to indicate if a forum is open to Customers, via the portal, or only available to those with HelpSpot accounts (private). HelpSpot defaults to *no*, meaning the forum will be public.

- *Closed*. This drop-down allows Administrators to close a forum, preventing any posts from being added. As part of the creation process, this is defaulted to *No;* however, can easily be changed via the drop-down if so desired.

5.2.2 Forum Management

Forum properties are easily accessible by clicking on the Forum title from the Manage Forums page. The properties listed are the same as those completed during the creation process.

> ***Hiding forums from the Portal***. If you wish to remove a forum from the portal, without losing the discussion by deleting, set it to private (by selecting *Yes* in the Private drop-down as part of the forum properties). This will remove it from the portal and make it accessible only through the Forum area of HelpSpot.

When a Forum has served the desired purpose and the discussion is no longer valid, Administrators can opt to delete the entire Forum by simply clicking the *Delete Forum* button. This will remove it from both the portal and Forums area of HelpSpot.

5.3 Ordering Forums

Forums, both public and private, can be ordered through the Forum Order link within the sub-navigation of the Forums tab. Type the desired number order and hit the *Save Order* button.

5.4 Create a New Topic

From the Forums tab, clicking the forum name will bring Users to a list of all topics within the forum. Below the list of linked topics there is a form for adding a topic, as shown in Figure 5.3.

When adding a topic, Users must complete the following fields:

- *Topic Name*. Required. This name will show in both HelpSpot and the portal.
- *Message*. Required. For Users to type the initial post within the topic. Spell checking is available if enabled in the installation.
- *KB/Append Response*. Links to knowledge book pages and/or predefined responses can be added to the message of a topic.

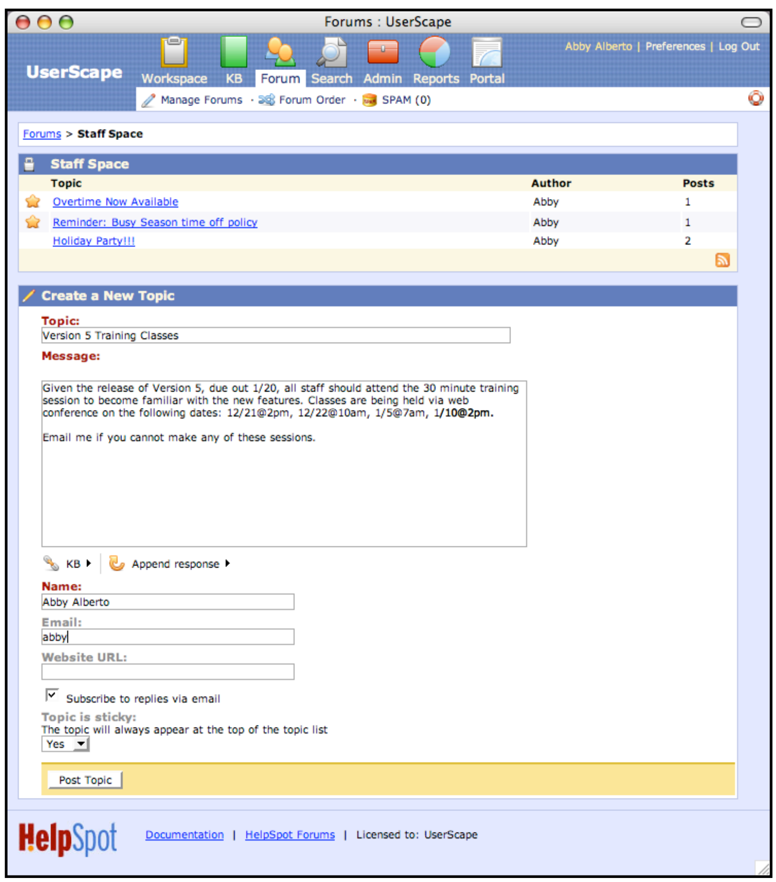


Figure 5.3: Topic List and Topic Creation Form

- *Name*. Required. This is pulled from the name on the preferences page for the logged in User.
- *Email*. As with name, this is pulled from the email on the preferences page for the logged in User.
- *W*ebsite URL. Not required, but can be optionally added by User.
- *Subscribe to replies*. Checking this box will notify the User via email of any replies to the topic.
- *Topic is Sticky*. This is defaulted to *No*, meaning any subsequent topics will be listed above this topic within the display. Selecting *Yes* will keep this topic at the top of the display.

Once a topic is posted it will immediately be live within the forum. The steps for creating a topic are the same for both public and private forums.

5.5 Post Reply

Replies are posted within forum topics using the *Post Reply* form. This form can be accessed in a number of ways from the Forums tab:

- Click the forum name, from either the Public or Private Forums areas. Once in the forum, select the desired topic to post within.
- From either the Newest 15 Posts or Newest 15 Topics areas, click the linked posts/topics.

The reply capabilities within HelpSpot are similar to those within the portal. Users are required to provide a message and name. Email address, website URL, and subscription to replies are optional. If enabled, spell checking is available. Once a User posts a reply it is immediately available within the forum.

5.5.1 Advanced Reply Capabilities

Beyond simply adding a message in posts, Users have the added ability to insert links to knowledge book pages and include prepared responses.

Adding Knowledge Book Links

Users can elect to include links to public knowledge book pages in any posts created from within the Forums tab of HelpSpot. Adding these links can provide readers with further clarification regarding a process and procedure in a way that is quick and easy for Staff.

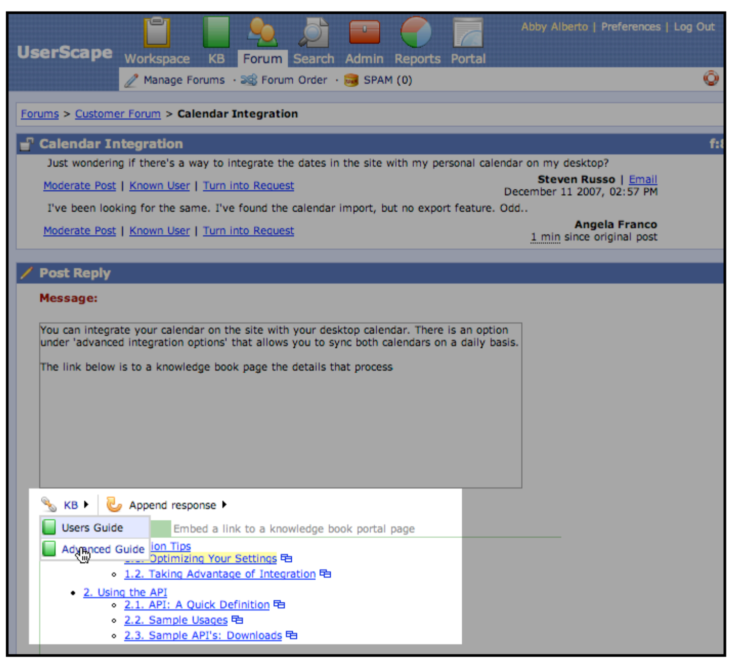


Figure 5.4: Inserting Knowledge Books Links in Posts

Within the *Post Rely* form on the topic page, Users will see a *KB* button with an arrow. When the button is clicked, a list of all public knowledge books are listed. Click the desired book and an embedded window will open a list of all pages within that book.

Only published pages of public knowledge books are available for linking.

See chapter 6 for more on knowledge books

Using Prepared Responses

Using a prepared response in forums is a quick way to reply to posts that reflect a common inquiry.

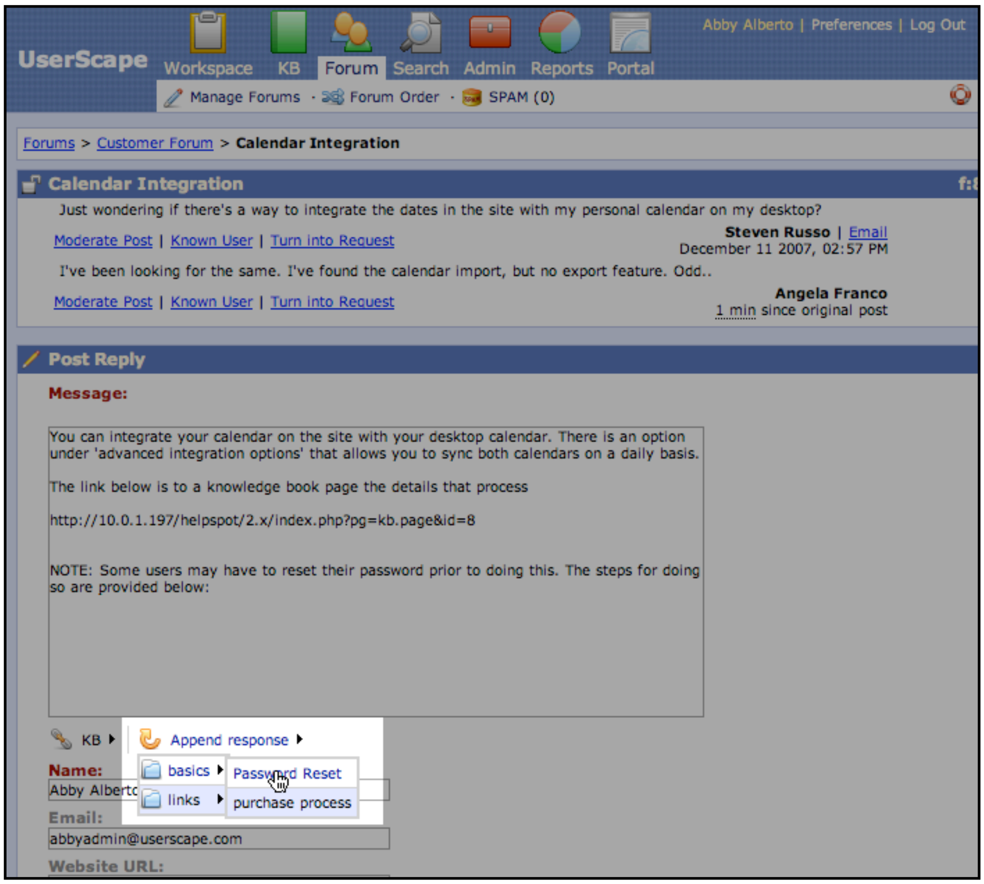


Figure 5.5: Using Prepared Responses in Posts

In the *Post Reply* form, Users will see the Append Response link; clicking this link will show all responses (both personal and global). To append a response to the post, simply click on response and it will be inserted in the message box where it can be used in its entirety or modified prior to submitting.

See section 2.4.2 for more on responses

5.6 Turning Posts Into Requests

Users have the capability to turn posts that reflect an issue or inquiry into requests by clicking the Turn into Request link just under the individual post. From there, Users will be brought to the request page where the request can be managed as they would any other.

When a post is turned into a request, a link will appear within the message to bring readers directly to the forum thread on the portal.

5.7 Flagging Known Users

HelpSpot provides the capability to flag posters (readers that create posts within a forum) with a text-based label. This is useful to indicate those that are 'expert users' or a Staff person. The label can help add creditability to the post(s) or put the appropriate context around a comment. Figure 5.6 shows how labels will appear within a post.

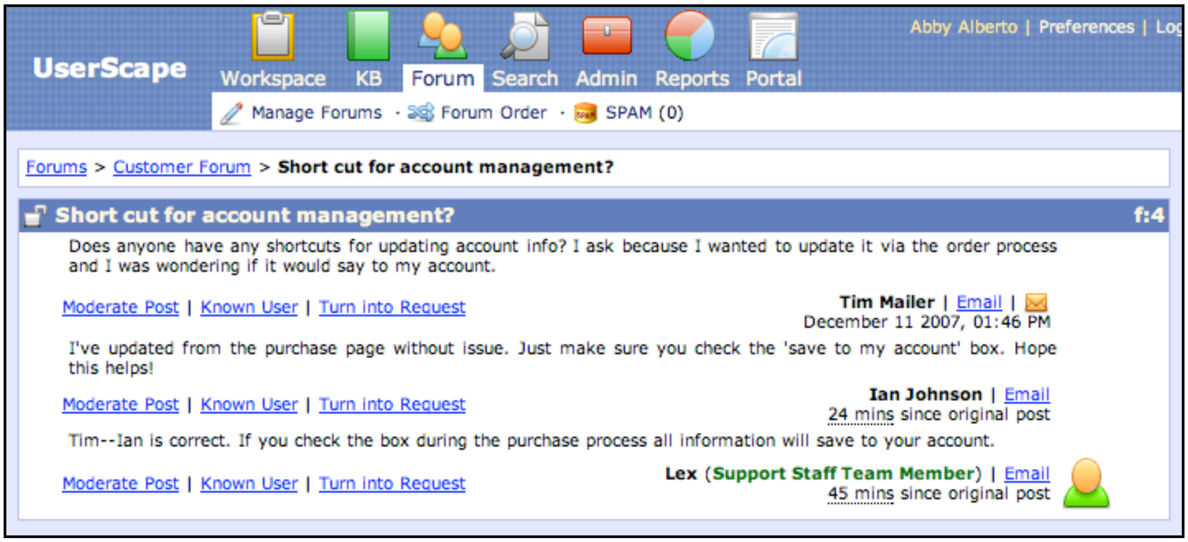


Figure 5.6: Labeling Known Users in Forums

Labels are added by clicking the Known User link just under the individual post. Once on the label page, you can opt to use an existing label or create a new one using the text box below the drop-down.

Labels are applied to all forum posts created by the designated reader and are displayed in both the portal and the forums area within HelpSpot.

> The label is tied to an individual via a browser cookie; if cookies are cleared or another browser is used the label will not be applied to subsequent posts.

5.8 Topic Moderation

All topic moderation occurs within the Forums tab of HelpSpot at the topic level. The moderation options for the topic-level are displayed in the Moderator Topic Controls box, just below all posts within the topic, as shown in Figure 5.7.

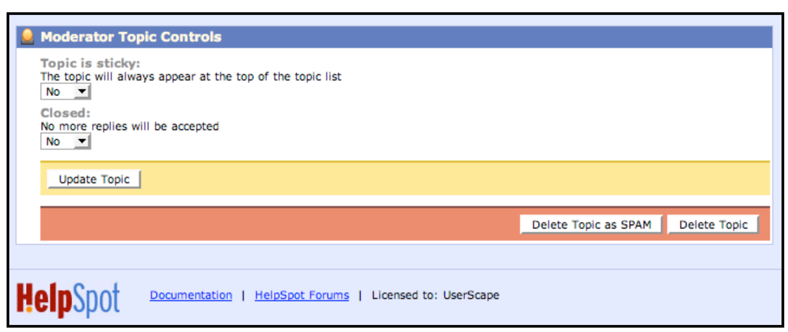


Figure 5.7: Moderator Topic Controls

> Moderator capability is limited to those who have been given permission by an Administrator.

5.8.1 Creating Sticky Topics

If Moderators wish to draw attention to a specific discussion or topic, within a forum they can do so by selecting *'Yes'* to the *Topic is Sticky* question within the Moderator Topic Controls box.

Sticky topics will always appear at the top of the topics list within a forum, both public and private.

> Creating sticky topics that are closed can serve as means to creating a prominent area within a forum for posting Forum guidelines (rules) or announcements to readers.

5.8.2 Closing Topics

When a discussion has run its course, or if Moderators need to reign in a discussion that has wandered from the original topic, clicking '*Yes'* in the *Closed* dropdown will close a topic—preventing additional posts from being added.

5.8.3 SPAM Topics

If a topic seems to be automated, overt advertising or inappropriate for a discussion of your product/service, it can be flagged as SPAM and deleted by clicking the *Delete Topic as SPAM* button (just below the Moderator Topic Controls box on the topic page).

As with other areas of HelpSpot, flagging SPAM appropriately is necessary to facilitate the learning of the auto-SPAM filtering. Over time, with appropriate flagging, HelpSpot will learn the characteristics of the SPAM the site receives and auto-flag it as such.

> Staff can check posts that were automatically marked as SPAM by going to the SPAM sub-navigation within the forums tab. From here you can delete or *Mark as Not SPAM* for those labeled incorrectly.

HelpSpot has a security word (captcha) on the Add a Topic form on the portal that helps limit the number of SPAM forum posts.

5.8.4 Deleting Topics

If a topic isn't necessarily SPAM but is inappropriate and needs to be removed, Moderators can do so simply by clicking the *Delete Topic* button (just below the Moderator Topic Controls box on the topic page).

> Once it's gone, it's gone! Deleting permanently removes items from HelpSpot.

5.9 Moderating Posts

Clicking the Moderate Post link for an individual post within a topic, as shown below, will bring Moderators to the post-level moderation options.

5.9.1 SPAM Posts

If a post seems to be automated or overt advertising, it can be flagged as SPAM and deleted by clicking the *Delete Post as SPAM* button.

As with other areas of HelpSpot, flagging SPAM appropriately is necessary to facilitate the learning of the auto-SPAM filtering. Over time, with appropriate flagging, HelpSpot will learn the characteristics of the SPAM your site receives and auto-flags it as such.

Staff can check posts that where automatically marked as SPAM by going to the SPAM sub-navigation within the forums tab. From here you can delete or *Mark as Not SPAM* for those labeled incorrectly.

HelpSpot has a security word (captcha) on the Add a Post form on the portal, which will helps limit the number of SPAM forum posts.

5.9.2 Deleting Posts

If a post isn't necessarily SPAM but is inappropriate and needs to be removed, Staff can do so simply by clicking the *Delete Post* button on the moderating post page.

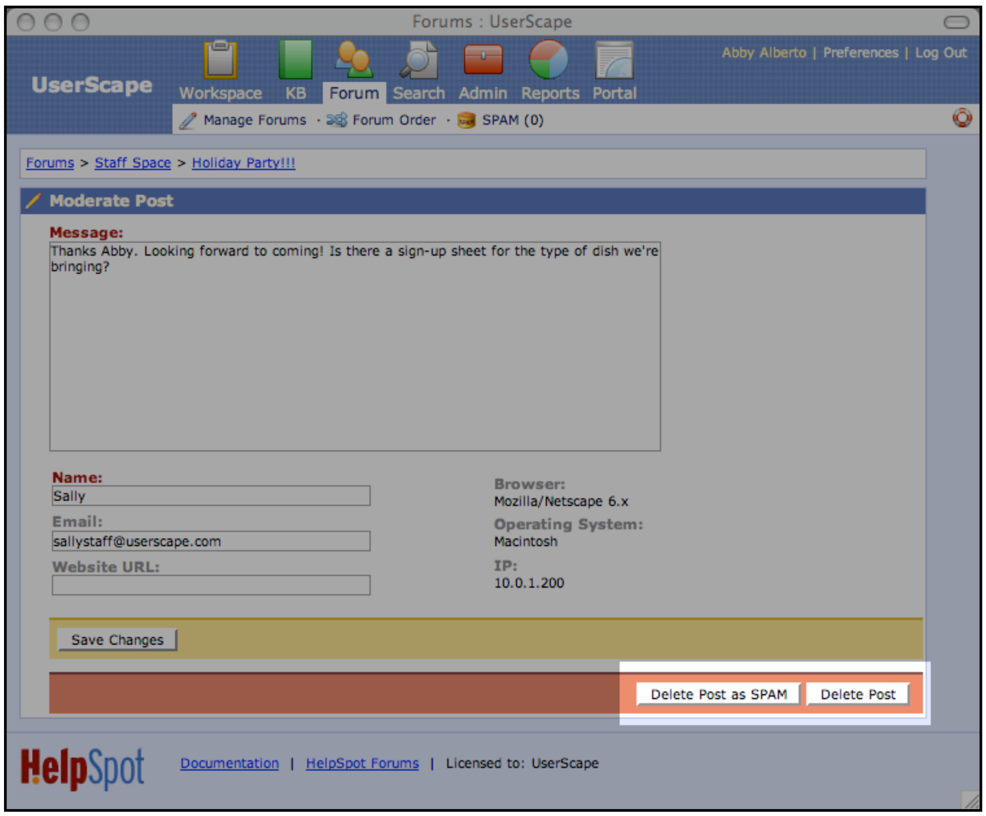


Figure 5.7: Deleting a Post

Once it's gone, it's gone! Deleting permanently removes items from HelpSpot.

5.10 Accessing Auto-flagged SPAM

Posts and topics flagged by HelpSpot as SPAM are accessible via the SPAM link in the sub-navigation of the Forums tab. Periodically, Staff should check this area to ensure no legitimate topics/posts were mistakenly flagged. From here Staff can delete or *Mark as Not SPAM* for those labeled incorrectly.

HelpSpot has a security word (captcha) on the Add a Post and Add a Topic form on the portal, which will helps limit the number of SPAM forum posts.

5.11 RSS

Both public and private forums have RSS capability that will allow readers to follow discussions from within any RSS reader.

6 Knowledge Books

Knowledge books allow an organization to create documentation for their products/services. Books are organized with chapters and pages—providing a familiar structure for ease of navigation.

Throughout this section reference will be made to public and private knowledge books, the differences are:

- **Public**. Intended for Customers. These knowledge books are available via the portal and through the KB area within HelpSpot (by Staff only).

- **Private**. Intended for Staff only. These knowledge books are accessible only via the KB area within HelpSpot.

6.1 Navigating the Knowledge Book Area

Books intended for Staff access only are called private and are accessible only within the KB area of HelpSpot. However, Staff can opt to view public knowledge books through either the KB area of HelpSpot or the portal.

See section 8.3 for more on knowledge books and the portal

From the workspace, click the KB tab to go to the knowledge book viewing/management area.

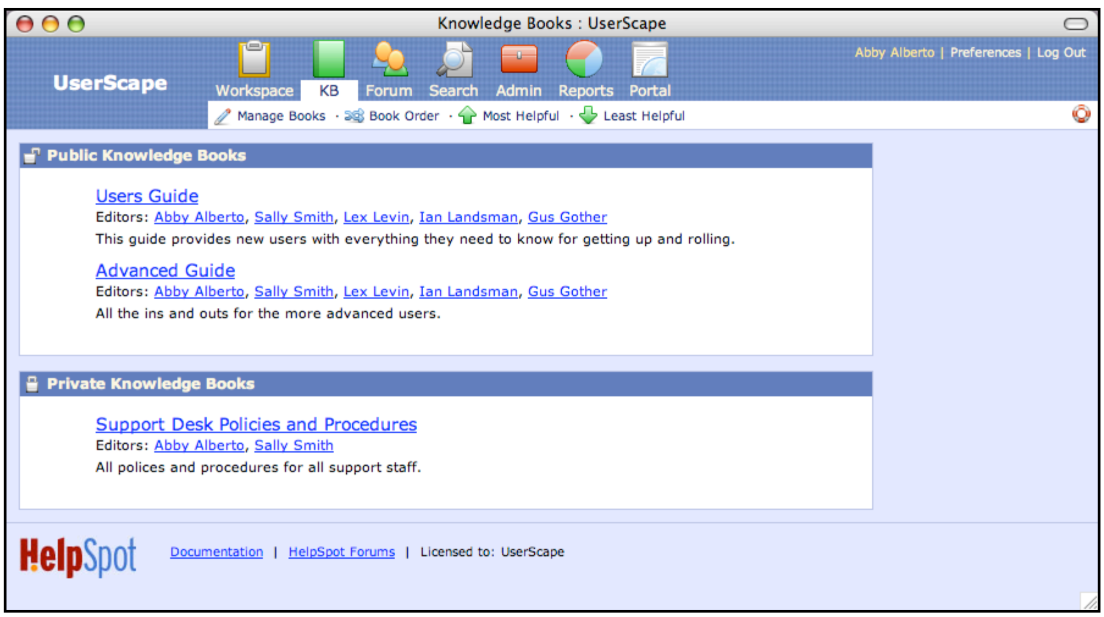


Figure 6.1: Accessing Knowledge Books in HelpSpot

The sub-navigation within the knowledge book area allows for the creation and management of knowledge books. Below is a quick look at the function of each sub-navigation item.

- Manage Books link brings Users to the knowledge book creation page and provides a list of existing books to modify book-level properties.

- Book Order allows for the sorting of public and private books.

- Most/Least Helpful provides a quick look at those pages that were ranked by Customers as the most and least helpful.

Public/Private Book Listings

The center of the page contains a listing of the public and private knowledge books, with the brief description and list of Editors.

> Books listed within the private section are available for viewing by only those with a HelpSpot account. Books that are listed as public can be viewed by anyone via the portal.

All Users must use this area to access private books while public books can be read here or via the portal. Clicking on a book title will allow Editors to add and modify chapters/pages.

6.2 Knowledge Book Creation

To create a knowledge book, click the Manage Book sub-navigation item. Using the *add a knowledge book* form, specify the book-level properties. Each field in the form is described below.

> Only those with Administrator level access can create knowledge books.

- *Book Name*. Specify the book title, as every book must be named.

- *Description*. Administrators may wish to include a brief description to provide readers context around the book's content. This description will be displayed within HelpSpot and the portal.

- *Book Editors*. An editor can be any User with a HelpSpot account, regardless of their access level, allowing for the most flexibility and ensuring that the appropriate people can manage documentation. Editors can add/edit chapters and pages as well as book-level properties.

- *Private*. Defaulted to *No* (book is available via the portal for anyone to see). Selecting *Yes* will make the book private and available for viewing by Users via HelpSpot.

> Keep in mind that as soon as a public knowledge book is added it will be live on the portal. To prevent Customers from seeing partial books, select *Yes* to making your books private until you're ready to have them go live.

6.3 Knowledge Book Editing: Book-Level Properties

From within the Manage Books area, existing books are listed above the *Add a Knowledge Book* form. Books are broken out by public and private.

To modify any of the book-level properties, simply click the title to be brought to a page that contains the existing properties for modification and a way to delete a book.

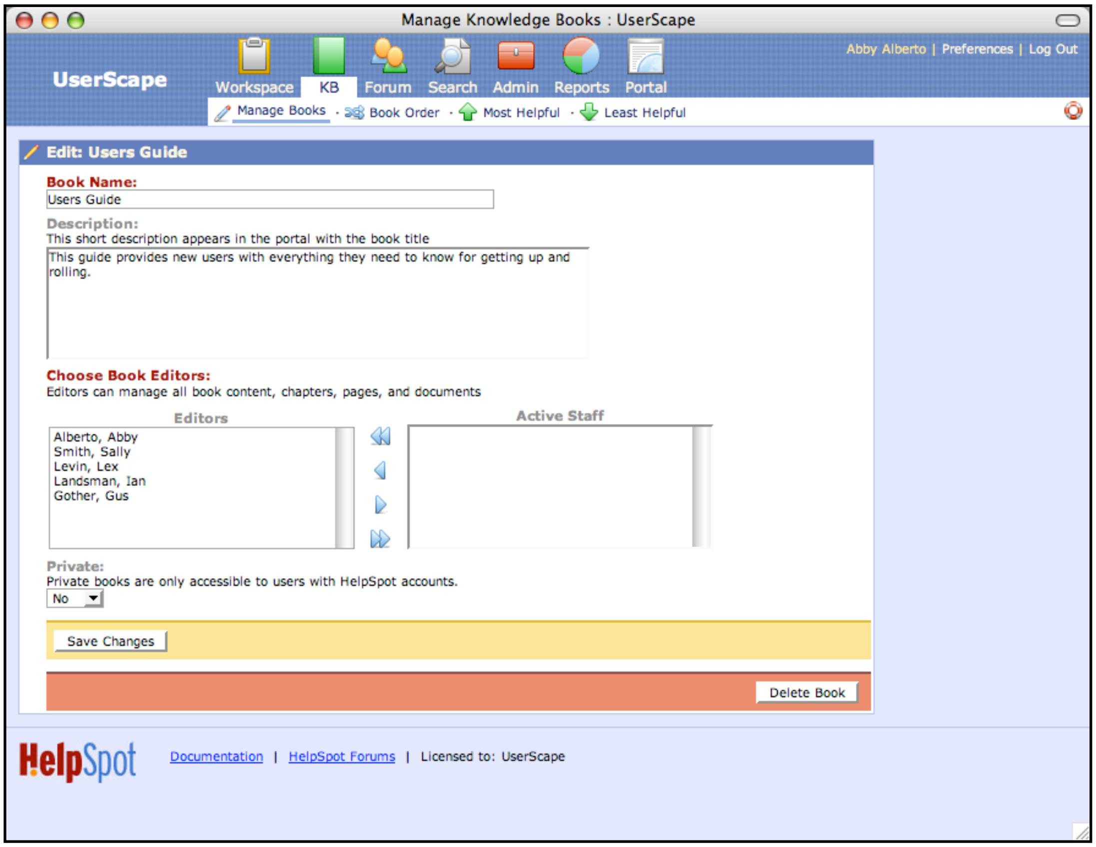


Figure: 6.2: Editing Book-Level Properties

Sections 6.4-6.9 are applicable only to those that have been designated as an editor.

6.4 Adding Chapters

From the KB tab, select the book to add chapters to. Once on the book's table of contents page, there's a link at the top to Add Chapter, as shown below. This link will be above existing chapters, if any.

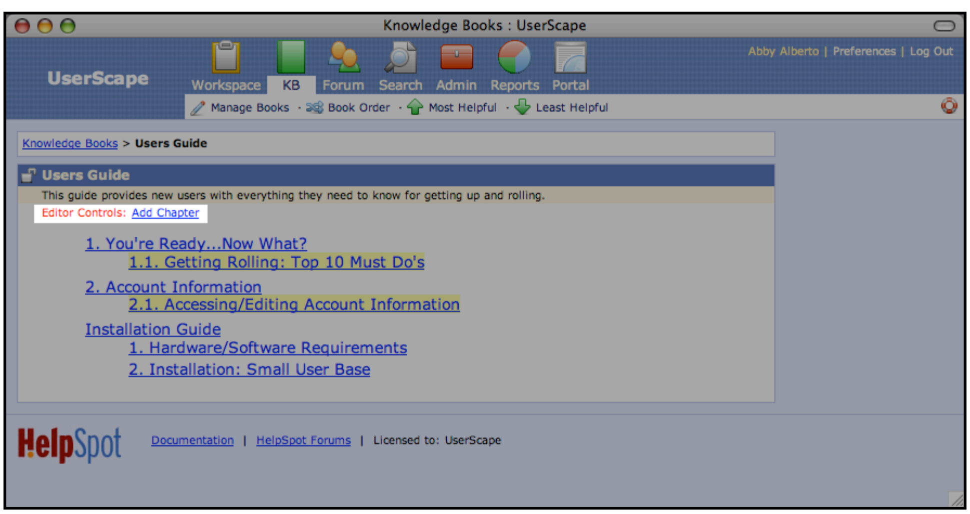


Figure: 6.3: Adding A Chapter to a Book

The Add Chapter link brings Editors to the *Add Chapter* form, as in Figure 6.4.

- *Chapter Title*. Required.
- *Order in Book*. Indicates where in the book the chapter will fall, relative to any existing chapters. This is especially helpful to have when chapters are being created out of sequence.

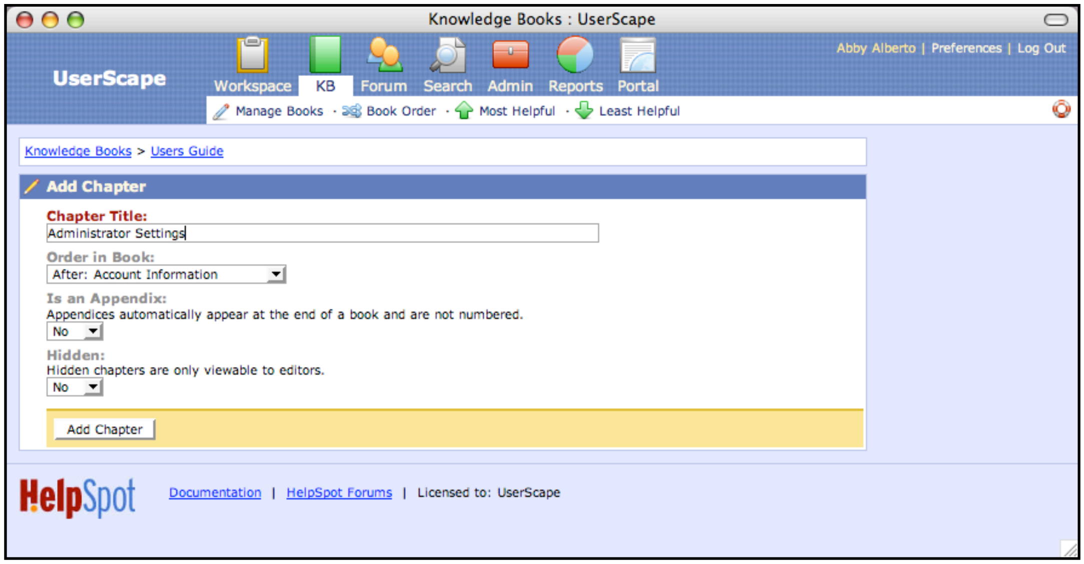


Figure: 6.4: Add a Chapter Form

- *Is an Appendix*. If so, HelpSpot will default the placement of the chapter after all existing chapters.
- *Hidden*. While chapters are in progress they can be hidden from view to everyone except Editors. Selecting 'no' will make them live.

Save time during initial public book creation and make the entire book private until you're ready to go live—rather than hiding individual chapters. Hiding chapters is best used when adding chapters to an already live public or private books.

6.5 Editing/Deleting Chapters

From the book's table of contents page click the chapter title to edit. Once in the chapter, there is an option to Edit Chapter. This link allows Editors to modify any of the chapter level properties or delete that chapter from the book.

6.6 Adding Pages to Chapters

From the book's table of contents page click the title for the chapter where pages need to be added. All existing pages are listed within the center box. Just below the title of the chapter, there is a link to Add Page. Clicking this will begin the page creation process.

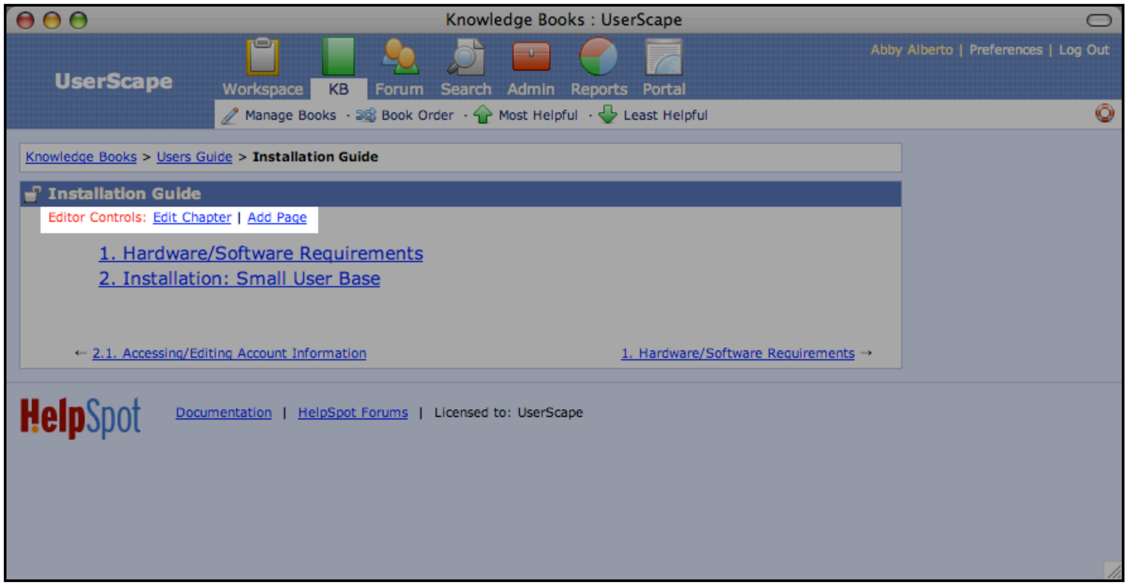


Figure: 6.5: Adding a Page to a Chapter

Adding pages is a two-step process. First, page title and order within the chapter must be specified.

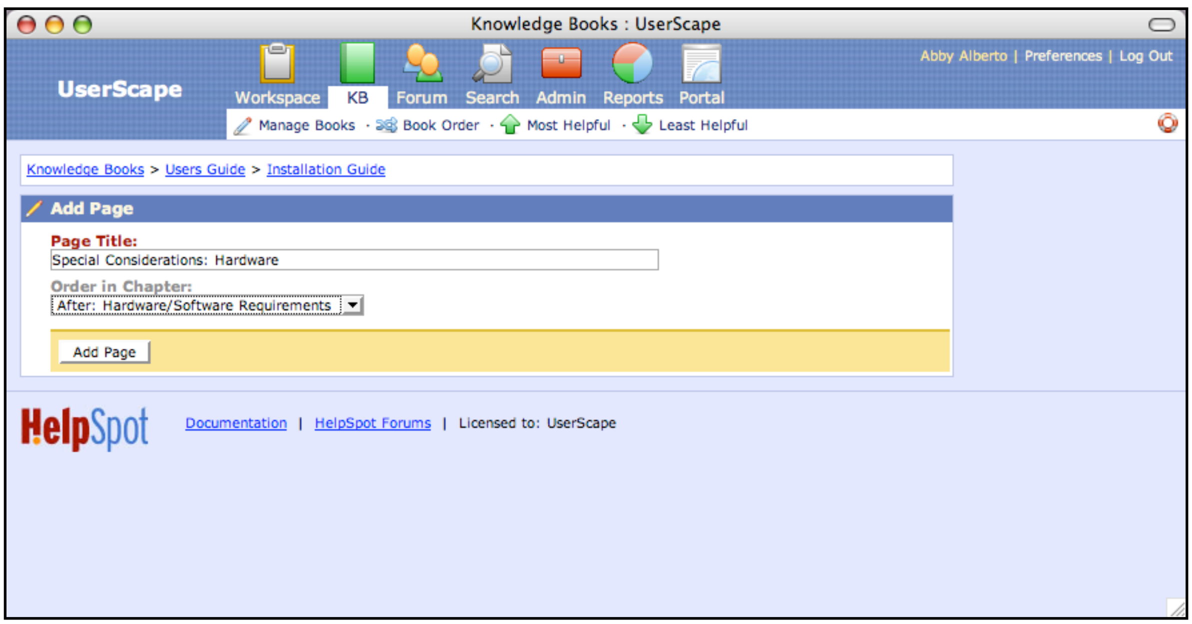


Figure: 6.6: Add a Page—First Step

6.6.1 Page Editor

In the second step of page creation, Editors will be brought to the page editor.

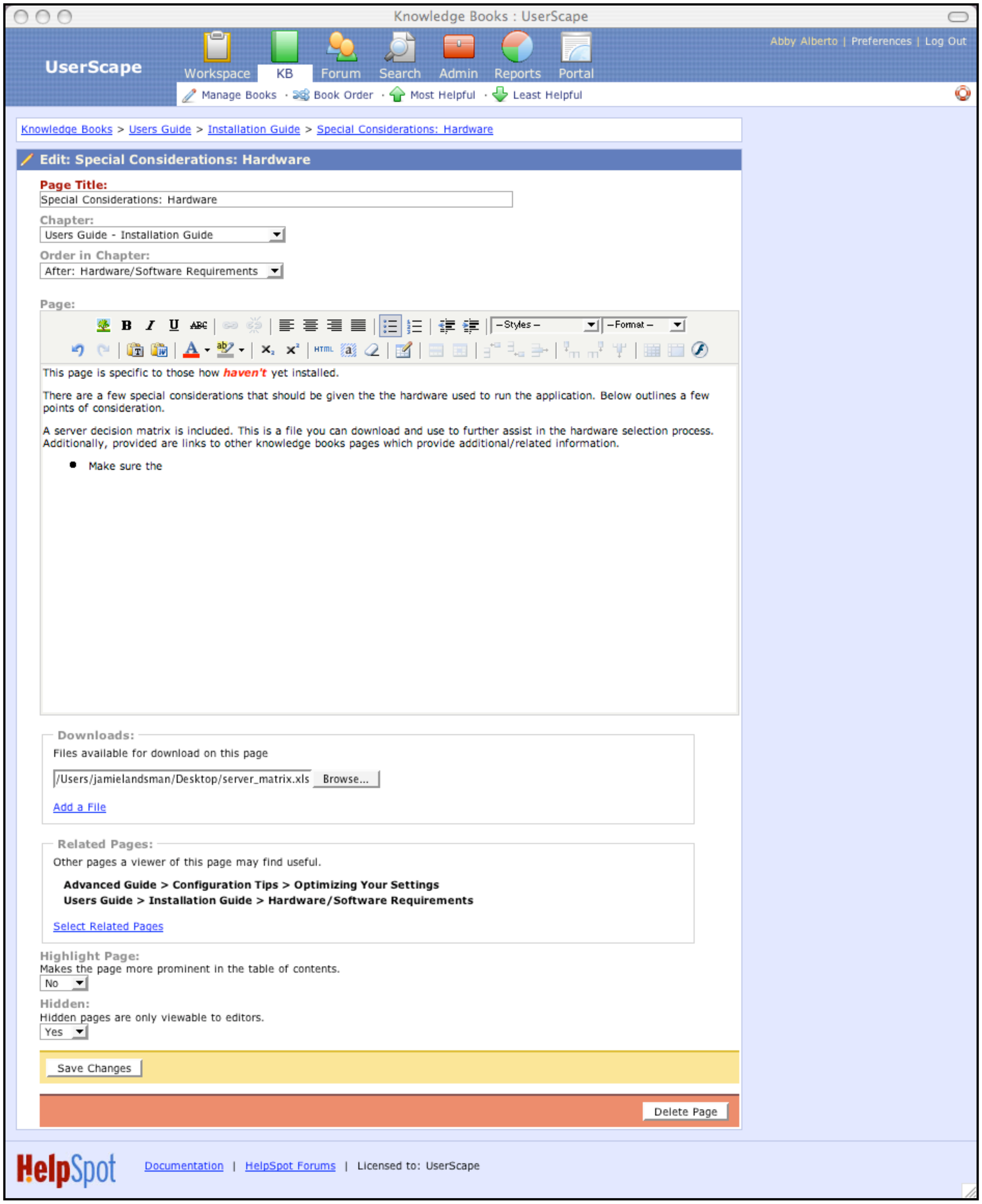


Figure: 6.7: Add a Page—Second Step

- *Page Title*, *Chapter*, and *Order in Chapter* are all carried over from the first-step in the process, but can be modified at this point if needed.

- *Page Content Editor*. The built in visual editor, similar to Microsoft Word, allows Editors to stylize and format the content without the hassle of hand coding the necessary web mark-up. Type the desired content into the text box, highlight, and select the desired action from the tool bar.

  The visual editor is not supported in Safari browser.

Holding formatting with copy/paste. Editors can copy/paste documentation already existing in Microsoft Word format into the visual editor to make page creation go quicker. However, the documents must first be saved as HTML (outlined below). This will hold most of the original formatting for moving into the knowledge book page.

1. Open the document in Microsoft Word.
2. In Word, go to *File>Save As* in the top menu.
3. In the file dialog box, select a location, modify file name, and change file type to *save as html*.
4. Open the saved HTML file of your documentation in your web browser.
5. Highlight desired text. Copy and paste into Page Editor in HelpSpot.

- *Downloads*. Editors can attach related files, such as forms or program files, to page for easy downloading by readers. HelpSpot does not limit the number of download files or file types. To the reader, these files will appear as links within a box, at the bottom of the page, labeled Downloads.

- *Related Pages*. Often a topic may cover multiple pages or a topic on one page may be related to another page. These connections can be highlighted for readers so they can easily locate any related material.

  Pages can be flagged for both public and private knowledge and will be displayed to the reader as a link in a box, labeled Related Page, after the page content.

- *Highlight Page*. Editors can draw prominence to pages in the table of contents by highlighting them. Those that are flagged for highlighting will display in the table of contents with a yellow band of color behind the page title.

- *Hidden Page*. For those pages that are in-progress but not ready to be published, Editors can hide for Editor's view only until they are ready to go live.

When looking at books via the KB tab, note that hidden pages will display in the book table of contents with red titles.

6.7 Editing Pages in Chapters

From the book's table of contents page, click the title of the page for editing. Once on the page Editors will see the page as it is displayed to the reader.

The bottom of the page contains an option to clear all most/least votes for a page.
Above the page contents, Editors will see a link to the Edit Page. Click it to be brought to the page editor.

When making significant changes to a live page, consider clearing all votes. This will allow Editors to assess the usefulness to your readers of the new page content.

You can quickly navigate to other chapters within a book by using either the breadcrumb navigation just above the page title, or the forward/backward navigation just below the page content.

6.8 Book Order

To modify the order of books, both public and private, use the Book Order sub-navigation link within the KB tab, as shown below.

On the ordering page, simply type in the number to set the desired order. Changes take effect immediately.

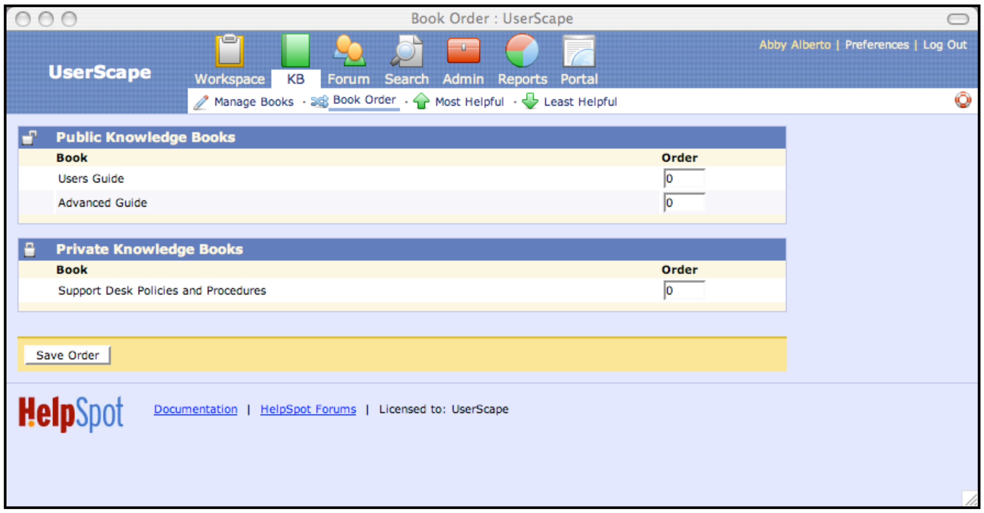


Figure 6.8: Setting Book Order

When books are flagged as private during creation and later changed to public for display in the portal, they will default to being last in the book list.

6.9 Most/Least Helpful

In the portal, readers are given the option at the bottom of each page to vote on whether the page was helpful. These votes are tallied and those pages with the most and least votes can be viewed by using the Most Helpful and/or Least Helpful sub-navigation items under the KB tab.

7 Mobile and iPhone Interfaces

HelpSpot has a powerful mobile and iPhone interface that allows Users to monitor Customer inquiries, even when on the go.

7.1 Mobile Interface

To access the mobile interface, click the mobile icon on the login screen. The mobile username and password are the same as those used for the standard web-interface of HelpSpot.

HelpSpot mobile is HelpSpot, so any actions performed in the mobile version will be reflected in the standard HelpSpot interface.

Figure 7.1: Accessing Mobile HelpSpot

Once logged-in, Users will find that the mobile interface is a slimmed down version of their HelpSpot installation.

7.1.1 The Workspace

This is the landing page once logged in. This area contains the Inbox, My Queue, as well as all personal and global filters. The name of each filtered view is linked, once clicked Users will be brought to a list of all requests within that view.

Figure 7.2: Mobile Workspace Page

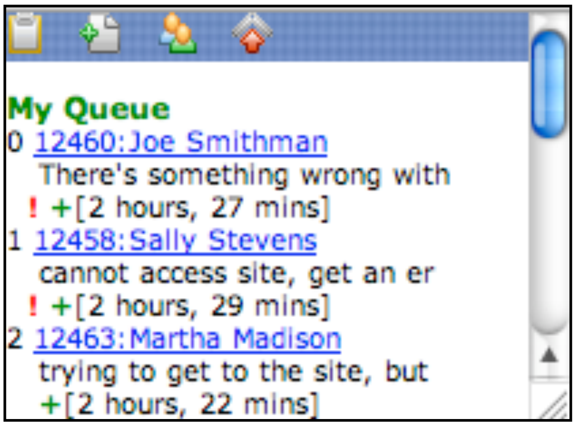


Figure 7.3: Filtered Views in HelpSpot Mobile

The following information is provided for each request listed:

- Request ID
- Customer Name
- First few words of initial request
- Request Age
- Urgent indicator, if applicable

7.1.2 The Request Page

It is from the list of requests that Users can click the request ID/Customer name to be brought to the mobile version of the request page for the individual request.

The layout of the mobile request page differs from the standard web-interface of HelpSpot however; the core of the request page functionally is available within the mobile version.

See chapter 3 to learn more about the request page

Important differences in the mobile version of the request page are as follows:

- The request history is at the top of the page, starting with most recent entry first.
- Category and assignment selection are on one drop-down to save on clicks.
- Notes are either public or private (there is no external note option).
- Notes are defaulted to public. To make notes private, uncheck the public box just below the note box.
- The time tracker, if enabled, is available through the Time link at the top of the page.
- Responses must be used **prior** to any other updates. The application of a response causes the page to reload—losing any data that hasn't yet been saved.
- To set reporting tags and custom fields, Users must first select the category, click *update*, than go back and add the reporting tag and/or custom field.

7.1.3 Forums

Using the forums icon on the top navigation, Users can access all the latest posts and topics for both public and private forums. Clicking on a post title will bring the Users directly to the thread to post a reply.

There is no moderation capability via the mobile version of HelpSpot.

See chapter 5 to learn more about forums

7.1.4 Log Out

The last top navigation icon is for logging out when the session is completed. Once logged out, Users will be returned to the mobile login screen.

7.2 iPhone Interface

Click the iPhone icon on the login screen as shown in Figure 7.4. The iPhone username and password are the same as those used for the standard web-interface of HelpSpot.

Once in the iPhone version of Helpspot, Users will be on the homepage.

Figure 7.4: Accessing HelpSpot for the iPhone

Add access to HelpSpot to the iPhone home screen by selecting the plus (+) sign in the browser and opting to Add to Home Screen.

7.2.1 Home

As shown in Figure 7.5, the homepage (screen just after log-in) contains the areas that can be accessed via the iPhone interface.

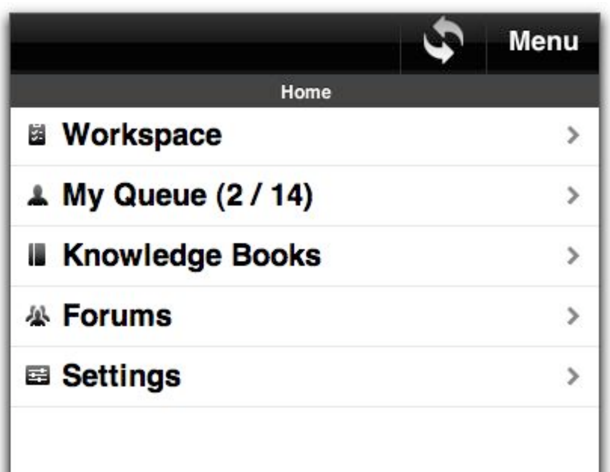


Figure 7.5: iPhone Home

The Menu link at the top right contains the same items listed within the homepage and is always accessible from any page.

7.2.2 Workspace

From the iPhone Workspace, Users can:

- Create new requests
- Access Inbox (dependant on permissions level)
- Access My Queue (short cut on landing page)
- Access personal/global filters (dependant on permissions level)

When creating new requests, Users should be aware that the following is required:

- At least one piece of customer data
- A note (only public and private note types are available)
- Category selection and assignment

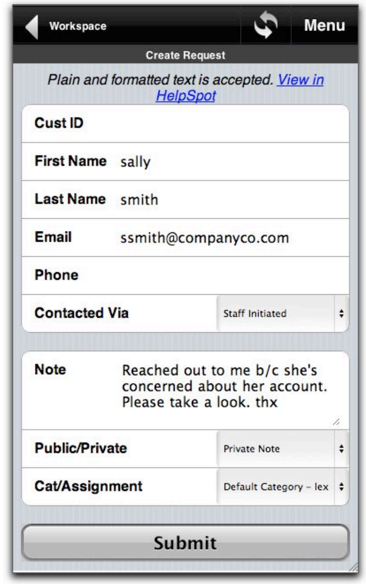


Figure 7.6: Creating a Request via iPhone

When viewing/updating existing requests, keep in mind that:

- Custom fields cannot be updated via the iPhone
- The More link shows Customer and request details (exception: custom field data)
- Complete request history can be accessed through the Show log items and notes link.

Navigation is simple. From any page use the arrow at the top left or the Menu at the top right.

7.2.3 Knowledge Books

Knowledge books are available via the iPhone only for the purpose of reviewing existing chapters and pages; Users cannot add/edit content. Editors (those with permission to edit books) must access the books via standard HelpSpot to make any changes.

Figure 7.6: Knowledge Books—iPhone

7.2.4 Forums

When accessing forums via the iPhone, Users have the ability to:

- View the latest posts and topics
- Create posts
- Delete posts, as needed
- Reply to posts

The more advanced moderation, such as flagging known users or using responses in posts, can only be done via standard HelpSpot.

7.2.5 Settings

This page houses a Users iPhone specific settings/preferences. Currently, only defaulting to My Queue is offered however settings will be added in the future.

8 The Customer Portal

The portal is the Customer-facing site for HelpSpot. It's designed to enable self-service and provide Customers with a centralize location for all support-related information/activities. From the portal Customers can:

- use the web form to submit an inquiry,
- check the status of an inquiry (or login to check status of multiple inquiries),
- view and participate in the forums, and
- look through knowledge books to find solutions.

While this manual uses the default portal style, it's important to note that HelpSpot's portal can be fully customized to be consistent with the look of any company's website/intranet.

HelpSpot can support multiple (secondary) portals. This is used when separate customer facing support areas are needed. Configuration is done through the Administration area of the installation.

Given portal functionality is consistent across primary and secondary portals, the balance of this chapter will focus on the use of one, the primary, portal only.

8.1 Portal Homepage

When Customers enter the portal they'll see three distinct areas on the homepage:

- *The left navigation*. Links for submitting/checking/updating requests as well as links to any knowledge books and forums (if public).

- *Center list of items*. Grouped lists of links to items that were highlighted by editors (knowledge books), newly created (forums), or flagged by readers as most helpful (knowledge books).

- *Search*. At the bottom of the screen it allows Customers to search forums or knowledge books.

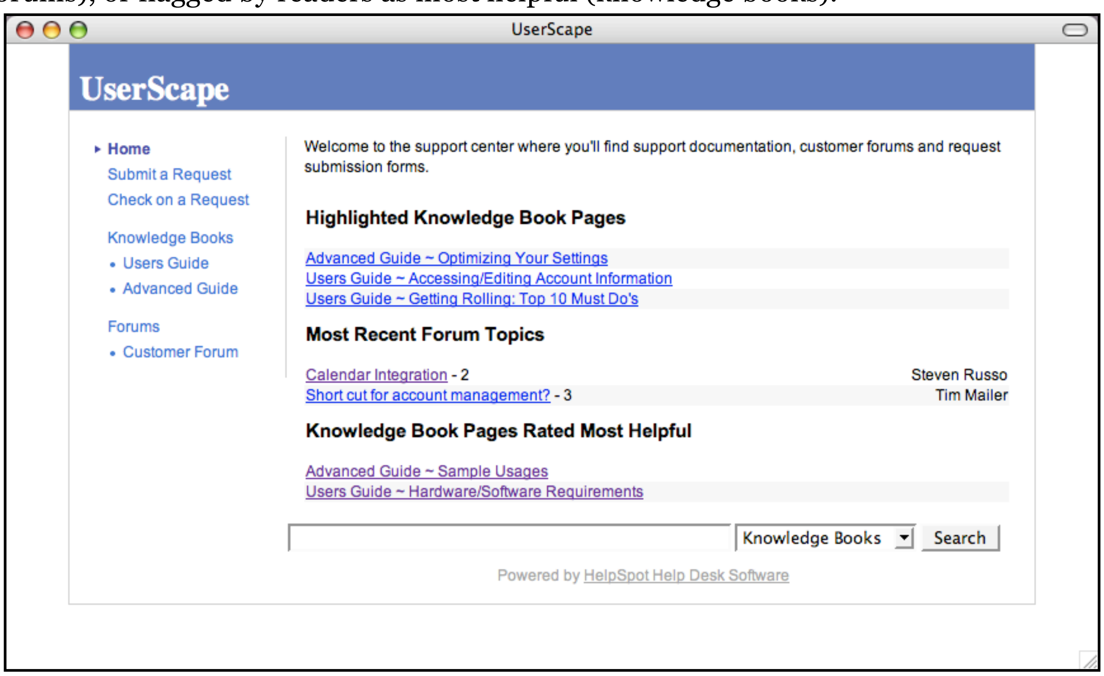


Figure 8.1: Portal Homepage

8.2 Submitting Requests

Clicking the Submit a Request link will bring Customers to the request submission form, as shown in Figure 8.2.

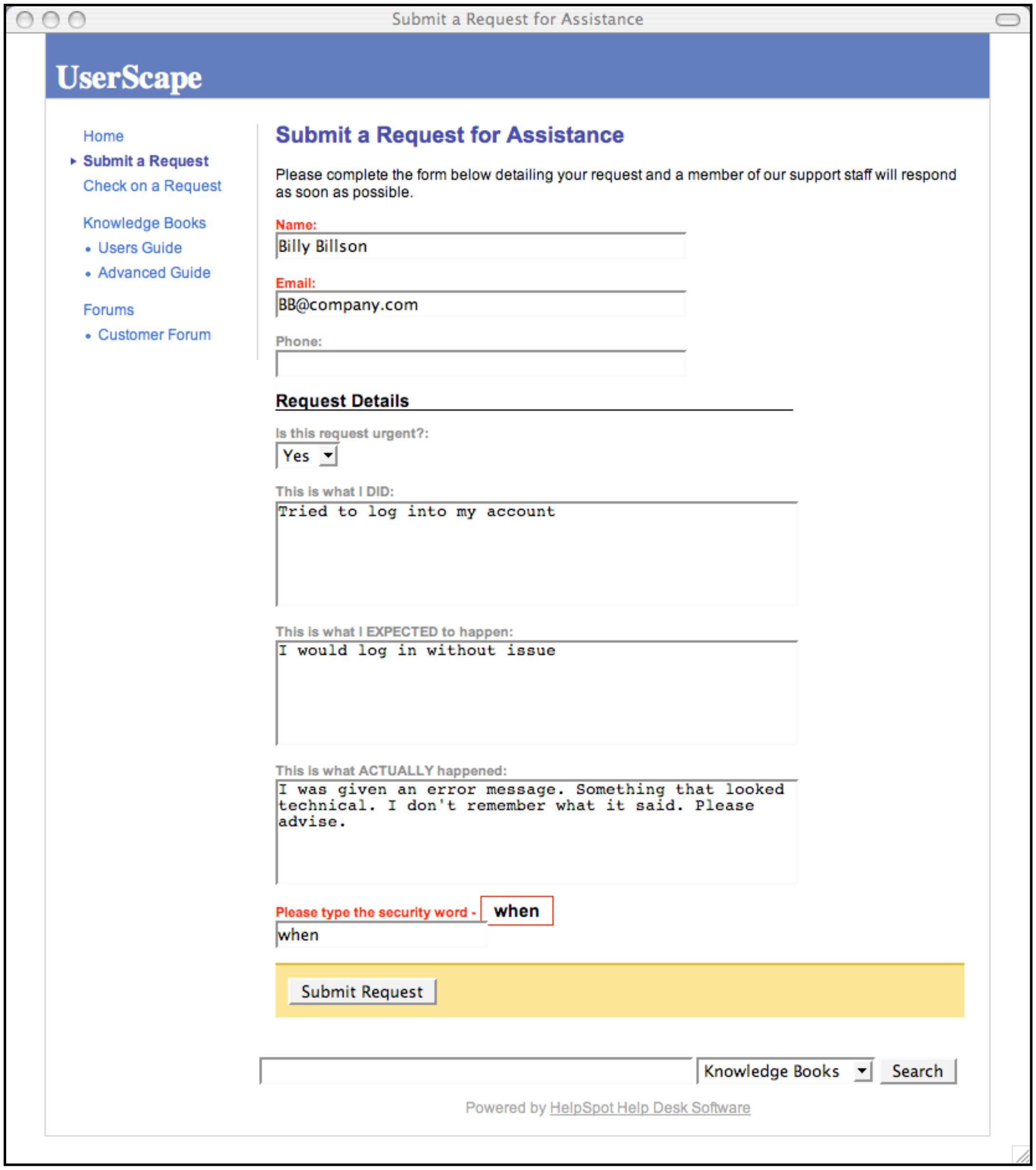


Figure 8.2: Basic Request Submission Form

The default fields on the form include:

- Name. Required
- Email. Required
- Phone.

- Urgent/not urgent option.
- Request description boxes. These boxes break down the issue into: what I did, what I expected to happen, and what actually happened. Administrators can change the request description boxes to a single, open text box.
- Security word. Required. Use of the captcha greatly reduces the amount of SPAM requests.
- File attachment (if enabled). Customers can upload files related to the inquiry.

Some installations may create custom fields and/or categories that they wish to make public to enable request workflow or capture additional information directly from the Customer. These additional fields would be listed between the urgent and request description fields on the form, as shown in Figure 8.3.

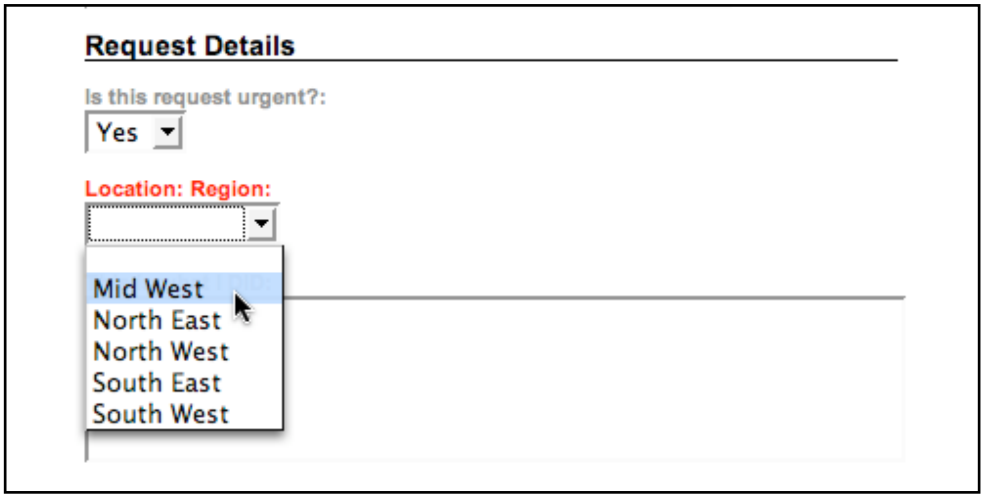


Figure 8.3: Request Submission Form with Custom Fields

See section 3.7.2 for more on custom fields and categories

8.2.1 Check and Update

Customers can use the Check on a Request link, within the left navigation, to check on and update requests. Customers must provide the request access key, which is provided by default in the emails Customers receive, to see a specific request.

> Checking a request isn't limited to those submitted via the portal. Customers can check on requests submitted via email or created by Staff as the result of a phone call or face-to-face interaction.

Customer Portal Login

For the quickest and easiest access to *all* their requests, Customers should login into the portal using their email address (one provided when submitting requests) and password. Passwords can be retrieved via the retrieve my password link.

Once logged in, Customers will see a list of all requests they have (opened and closed) as well as the option to change their password for future login.

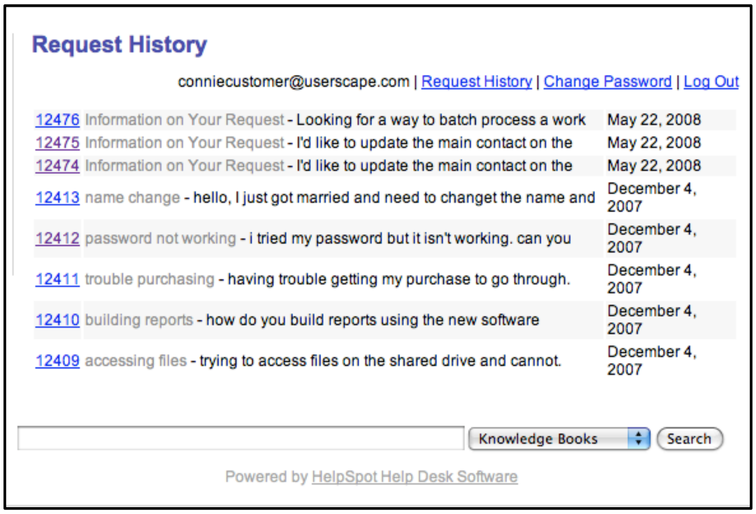


Figure 8.2.1: Request list when logged into portal

Updating a Request

Entering the access key, or click the request ID when logged in, will bring Customers to a screen showing all the public updates made on the request, including the initial request.

See section 3.4 for more on Staff creating public updates

Just below all public update entries and the initial request, Customers will find an open text field where additional updates or attachments can be provided (if enabled).

> Customer updates via the portal are shown within the request history of HelpSpot as a public update. For more on Staff views of Customer updates, see section 3.6.

8.3 Knowledge Books

Public books are highlighted in four areas within the portal:

- The portal homepage lists the knowledge book pages editors highlighted during the creation process.
- On the portal homepage, those pages voted most helpful.
- The left navigation will list all public knowledge books.
- Searching can be done within knowledge books.

Once a knowledge book title has been clicked, readers are brought to the table of contents, which includes all live chapters/pages with editor-specified pages highlighted for the reader, if applicable.

Chapters and pages are numbered sequentially with the chapter number preceding the page number, as shown in Figure 8.4.

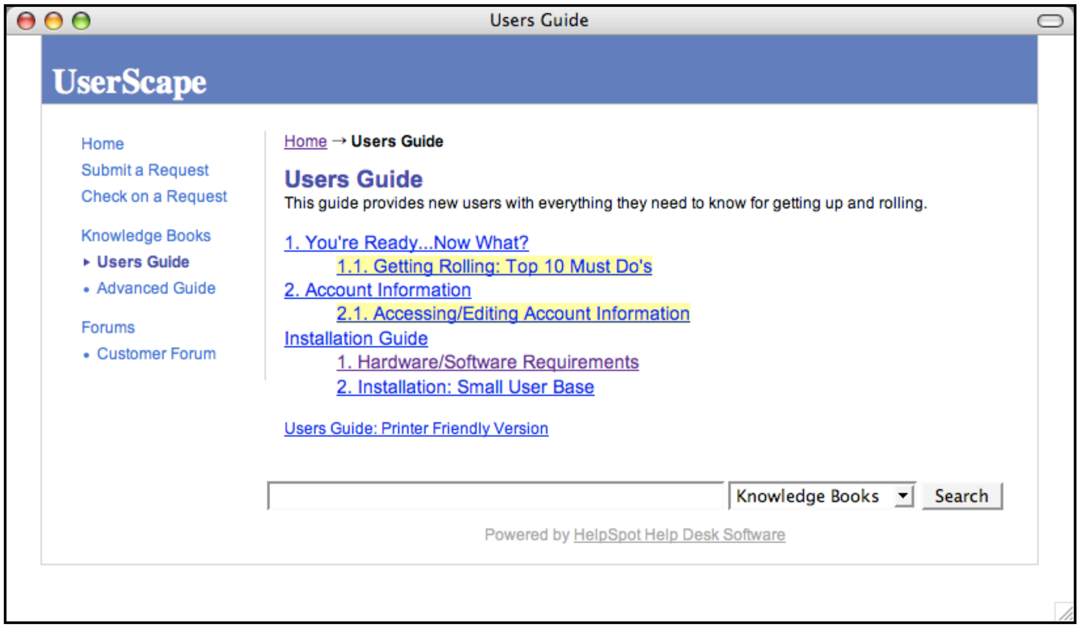


Figure 8.4: Knowledge Book Chapter List

Clicking on a page title will bring readers directly to the page content. Readers can vote on the helpfulness of a page. An aggregation of the most helpful pages from all public books is listed on the homepage.

See chapter 6 for more on creating/managing knowledge books

8.4 Forums

Public forums are highlighted in three areas within the portal:

- The portal homepage includes a list of the most recent topics (public forums).
- The left navigation lists all public forums.
- Searching can be done within forums.

8.4.1 Forum Topics

Clicking on a forum title from the homepage will bring readers to the list of topics within that forum.

From the forum's topic list, readers can click into any of the existing topics to read/reply or opt to create a new topic.

After the initial post by a reader, the name, email and website they provide is remembered to allow subsequent posts to go quickly.

You can navigate all public forums by using the left navigation on the portal homepage.

8.4.2 Forum Posts

Clicking the topic title will bring readers to the list of posts on the topic.

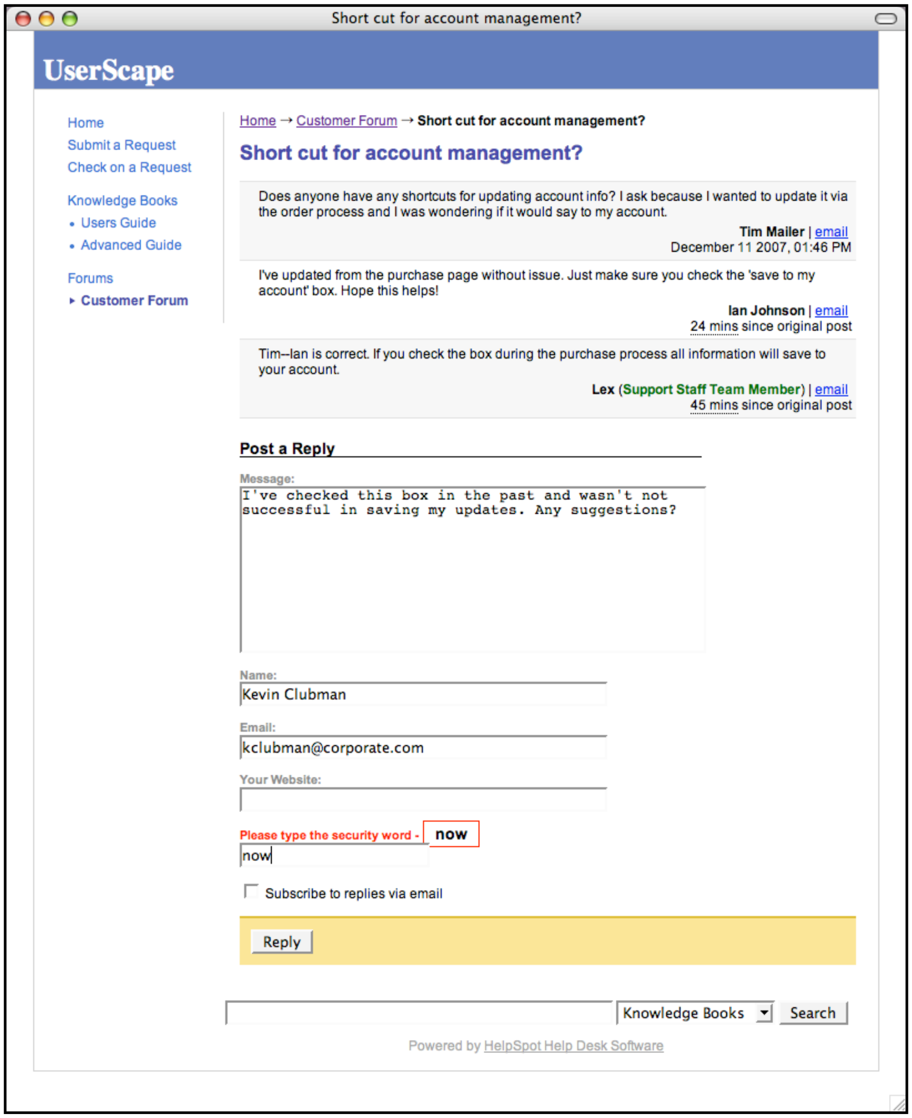


Figure 8.6: Forum Post with Replies

From here, readers can do the following:

- Read the initial post and replies
- Email those that posted
- Post a response
- Opt to subscribe to replies

When replying to a post, the only required fields are message and name. The exception is when a reader opts to subscribe to replies; in these instances an email address must be provided.

See chapter 5 for more on creating/managing forums

9 User Preferences

Once an account is created, each User has the ability to set/edit preferences for their account via the Preferences link in the top right corner of the screen, as shown in Figure 9.1.

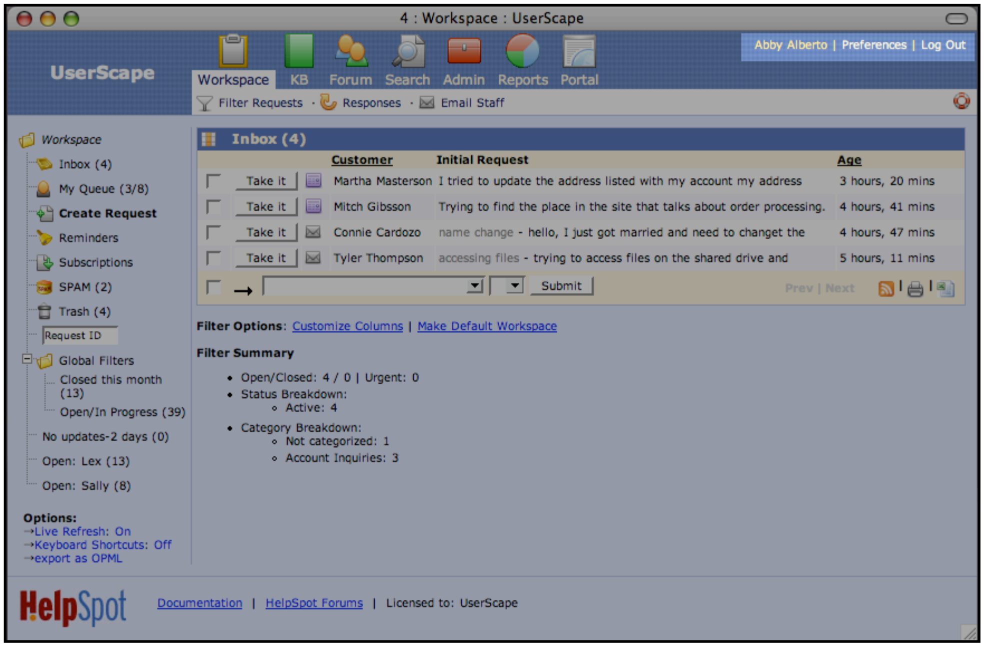


Figure 9.1: Accessing User Preferences

The preferences page covers everything from password changes to signature creation and allows Users to personalize their HelpSpot experience.

Make sure you hit *Save* at the bottom of the page to ensure all changes are applied.

9.1 Email and Password

The name, email, and password are displayed, at the top of the preference page, to the User as entered by the administrator during account creation. Users have the ability to update this information.

The email address listed here for Users is the default address HelpSpot uses for sending notifications.

9.1.1 Black Box Username

This is only required for Users in installations that are running alternative authentication with an external source (such as Active Directory).

9.2 Photo/Icon

Users can select from the stock images provided or opt to upload their own photo. The selected photo is used as part of the request history when the User creates an update, serving as a quick means to identify individual Users.

Users should resize images to 32x32 (pixels) prior to uploading to achieve the best results.

9.3 Communication

The communication area defines alternative contact information, out of office manager, as well as signatures for outgoing messages.

9.3.1 Alternative Contact Information

HelpSpot provides Users with a means for providing an alternative email, phone number, and SMS number. Options in the notification area, covered in section 10.4, allow Users to configure when messages/updates are sent via these alternative channels.

9.3.2 Out of Office Manager

If a User is going to be out of the office for an extended period of time, such as vacation or medical leave, all requests that would have been assigned to them can be assigned to an alternative User.

All Users are defaulted to being available. However, by using the drop-down Users can change their status and select whom their requests should go, as shown in Figure 9.2.

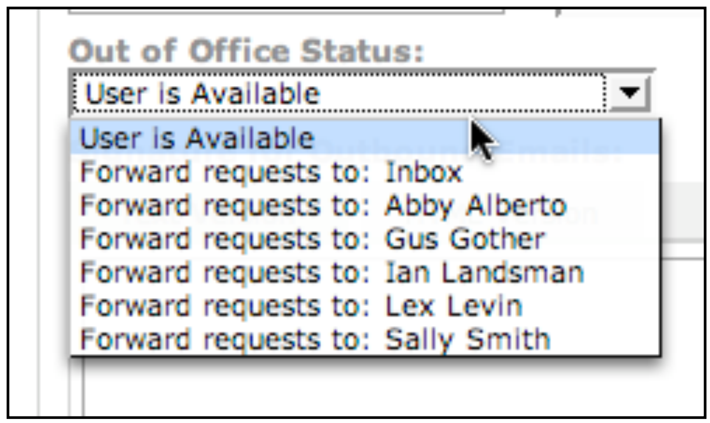


Figure 9.2: Setting Out of Office

A visual indicator of out of office status appears in the assignment drop-down on the request page.

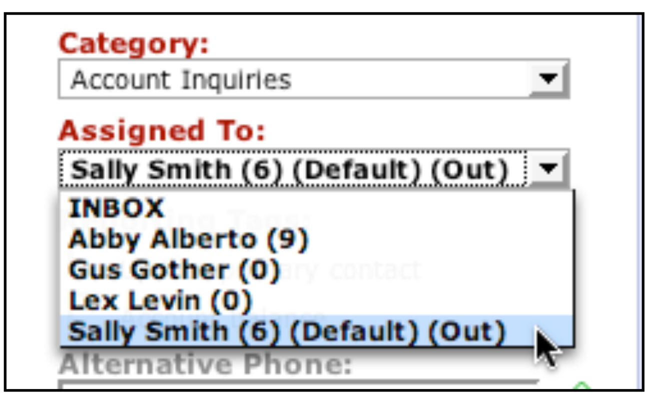


Figure 9.3: Out of Office—Assignment Drop-down on Request Page

9.3.3 Creating a Signature

Similar to any mail client, Users can create a signature block that is appended to every outgoing message/update (public and external notes).

HelpSpot offers both a text and HTML signature format to account for varying system configurations. As such, it is recommended that Users complete *both* text and HTML to ensure the signature is included.

When creating the HTML version of the signature, Users must use formatted text mark-up.

See section 3.3.1 for more on formatted text.

There's a third tab within the signature creation area for creating a mobile-specific signature. This signature will be used only when a User creates a note using HelpSpot mobile. Often a varying signature is used to inform the reader the note was created on a mobile device.

9.4 Notification

The notification area allows Users to configure where and under what conditions they receive a notification. The list below outlines each of the notifications options.

- *Send notification via email*. Checked by default, so any system notification and request updates will generate an email.

- *Alternative email notification*. Unchecked by default, this option sends all notifications to the alternative email address, as described in section 10.3.1.

- *SMS notification options*. HelpSpot allows Users to send all notification (that would typically go to an email account) to an SMS enabled device. Users can opt to select to send all notifications or only urgent ones. All SMS options are uncheck by default.

- *Notification for unassigned new requests*. User can opt to receive a notification for every unassigned request that enters HelpSpot. The notification method will follow the channel specified within the options described above. This is unchecked by default.

9.5 General Preferences

These general preferences help Users personalize their experience by defining specific aspects of the look and feel to match their personal work style.

- *Default to public note*. Selecting this will default the note type to public each time the User enters the request page.

- *Default time tracker to open*. For installations that utilize the time tracker, Users can opt have the time tracker open each time they enter the request page, saving Users the click of opening the time tracker.

- *Disable WYSIWYG in the knowledge books*. For Users that prefer to hand code HMTL they can opt to disable the visual editor (aka: WYSIWYG editor) for knowledge book creation.

- *Do not embed images in request history*. Selecting this option will treat images as other attachments and create a link at the bottom of the request history entry containing the image. By default, this is not enabled and all images are embedded within the request history entry.

- *Return to request after closing*. By default, when a User closes a request HelpSpot will return the User to the filtered view they were in prior to entering a request. Selecting this option will bring Users to a request summary page once a request is closed. Enabling this option will give Users an opportunity to double-check a request after closing but before moving to the next request.

- *Show Getting Started Menu in Workspace*. By default, HelpSpot will show all Administrators the Getting Started menu as a quick reference. This can be turned off, or on for other permission levels, simply by checking the box.

- *Number of request history entries shown by default*. Users can enter the desired number of request notes seen within the request history. HelpSpot defaults to showing 10 request history entries.

  Regardless of the number set in the preference, Users can see all request history entries simply by clicking the Show All link at the bottom of the request history list on the request page.

- *Default Request History View*. Users can specify if they wish to see Full Histories or Only Notes for every request they view.

- *HTML editor for HTML notes*. For systems with HTML notes enabled (system default), Users can opt to create HTML notes via the visual editor, formatted text, or use the system default (which could be either method; system default is the visual editor). Use of either the visual editor or formatted text will result in an HTML email being generated.

  HelpSpot defaults Users to the system default: the note creation method as defined by the Administrator.

10 Help!?—Additional Support Resources

Didn't find what you were looking for in the manual? Have questions on what you've read? Want more information on optimizing HelpSpot?

Below are the support-related resources available for HelpSpot.

- Getting started tool bar in workspace. The getting started menu provides direct access to specific resources to get Users up and running, while the Question link provides direct access to UserScape's support desk.

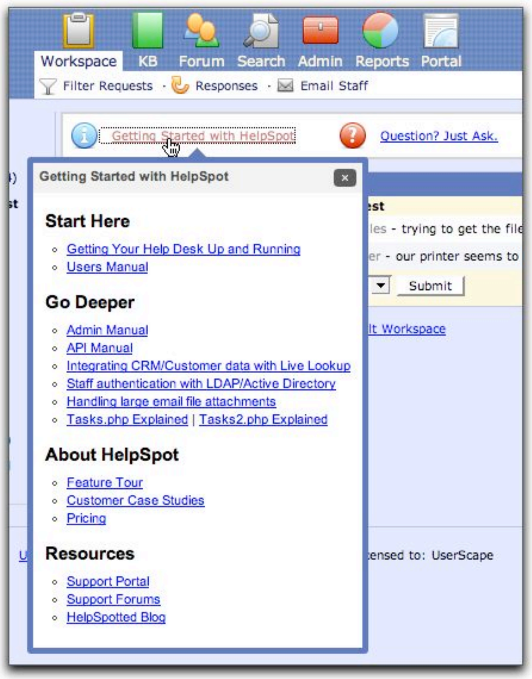


Figure 10.1: Getting started tool bar

- HelpSpot's Knowledge Books and Forums (http://www.userscape.com/helpdesk/) provide more specific information around setting up and optimizing HelpSpot.

- Submit a request for assistance via the request submission form (http://www.userscape.com/helpdesk/index.php?pg=request).

- Email questions/inquiries to customer.service@userscape.com.

- HelpSpot provides integrated support for each page of the site. Clicking the lifesaver icon provides Users with an overview of the key features on the page with some basic tips on usage. These tips are highlights of the more detailed information found in this manual.

Figure 10.2: Integrated Help Center

Appendix A: Request Grid Columns with Descriptions

The ability to add/remove columns in the request grid allows Users to fully customize any filtered view, including the Inbox and My Queue.

Because a column represents request-specific information once added to a filtered view Users can do quick sorts within the request grid based on columns to find specific requests.

For more on the request grid and working with filtered views, see sections 2.3 and 2.4.1 , respectively.

Below is a list of available columns with a brief description for each.

Table A: Columns and Descriptions

Columns	*Description*	*Usage Tip*
Age	Shows how long since the initial request was opened.	
Assigned To	Lists the User to whom the request is currently assigned.	
Category	Displays the current category assignment.	
Contacted Via	Graphical representation of how the Customer inquiry was initiated.	Graphics correspond to contact methods as listed in the drop-down on the Create a Request page.
Custom Fields	Each custom field within the installation will be listed in the drop-down and available for adding as a display column. Each is listed by the name of the custom field as given during the creation process.	Data will be displayed for the custom field as currently listed in the request.
Customer ID	Displays Customer ID.	Remember, HelpSpot doesn't assign Customer IDs. Live Look-up allows Customer IDs to be pulled from an external system.
Customer Name	Displays Customer first and last name.	
Date Closed	Displays the date a request was closed.	
Date Opened	Displays the date a request was opened.	
Email	Displays Customer email address.	
Email Subject	Displays the subject of the original Customer email.	
Initial Request	Displays the first few lines of the initial inquiry as sent by the customer.	Clicking for an individual request in the request grid will allow Users to preview the message.
Last Customer Update	Date/time stamp for the last Customer update made on the request.	
Last Name	Displays Customer last name.	
Last Public Update	Date/time stamp for the last public update made on the request.	
Last Update	Date/time stamp for the last update made on the request.	For any update made to the request: public, private, and external.

Latest Public Note	Displays the first few words of the last public note (created by either User or Customer).	Clicking for an individual request in the request grid will allow Users to preview the note.
Latest Public Note by	Lists the User that created the last public note.	When a Customer creates the last public note, this column will be blank for the request.
Mailbox	Displays account name of the email address the received the Customer inquiry.	Mailbox name as provided by Administrators during mailbox configuration in HelpSpot.
Opened by	Lists the name of the User that opened the request.	
Phone	Displays Customer phone number.	
Public Update Count	Provides a count of all public updates made on a request.	Includes all Customer updates as part of public update count.
Replied To	Graphical indicator of action taken on a request.	Can be in one of three states: 1. *Green Flag (**My Queue only**)*. The most recent update to the request is unread by the assigned User. 2. *Circular Arrow*. A Staff member was the last to reply. 3. *Empty or no graphic*. User has read the update but however a Staff member has yet to reply.
Request ID	Displays request ID.	
Status	Displays the current status.	
Take It	Displays Take It button.	Used most often in creating filtered views that are acting as a secondary Inbox.
Time Tracker Total	Displays current total of time spent on a request.	Time tracker must be enabled in the installation.

If data is not available for an added column, it will be left blank in the request grid for the request.

Appendix B: Placeholders with Description

Placeholders are variables that represent request/installation specific information in standardized response templates, such as auto-reply email or prepared response. Appropriate use of placeholders can make an otherwise canned reply feel customized to the reader.

For more on using placeholders in prepared responses, see section 2.4.2 . Below is a list of all available placeholders accompanied by a brief description.

Placeholders are inserted into messages/updates only when the data is available. Instances where information is not available, no reference to the placeholder will appear in the message/update.

Table B: Placeholders with Descriptions

Placeholders	*Description*
Request ID	Inserts request ID for the customer inquiry.
Access Key	Inserts the request access for quick look-up on the customer portal.
Portal login email	Provides Customer with their email address for logging into the portal to view all requests.
Portal login password	Provides Customer with their password for logging into the portal to view all requests.
Customer first name	Inserts Customer first name.
Customer last name	Inserts Customer last name.
Customer ID	Inserts company's unique identifier for Customer.
Customer email	Inserts the Customer email, as provided in the Customer area of the request.
Customer phone	Inserts Customer phone number.
Status	Inserts current assigned status.
Category	Inserts current assigned category.
Urgent	Inserts indicator of urgency, if applicable.
Open/Closed	Tells readers if the request is currently opened or closed.
Date Opened	Inserts the date the request was initially created.
Date Now	Inserts current date/time.
Assigned staff member: first name	Inserts first name of current staff member assigned to request.
Assigned staff member: last name	Inserts last name of current staff member assigned to request.
Assigned staff member: email	Inserts email of current staff member assigned to request.
Assigned staff member: phone	Inserts phone number of current staff member assigned to request.
Original mail subject line	Inserts subject line from original message from Customer.
Initial Request Note	Inserts the original message that created the request.
Custom fields: NAME	*Each custom field is listed in the placeholder dropdown as an option. Each is listed as: Custom Field: NAME OF FIELD.*
Note: The placeholders below are listed for each secondary portal created.	
Organization Name	Inserts name of company, as defined in installation.
Help Desk URL	Inserts a link to the Customer portal.
Request Form URL	Inserts a link directly to the *submit a request* form on the Customer portal.
Request Check URL	Inserts a link directly to the *check request* form on the Customer portal.

Knowledge Book URL	Inserts a link directly to the knowledge book area of the Customer portal.
Forum URL	Inserts a link directly to the forums area of the Customer portal.

Appendix C: Tables and Figures