Getting Started With Freshdesk

Check out the all-inclusive guide for your way inside Freshdesk
Chapter _ 01

The First Step

• Email and notifications
• Agent and group creation
Email and notifications

Any email sent to the primary support address gets automatically converted into a Freshdesk ticket. You can categorize, prioritize and assign every email to support agents. To stay updated when working on other tabs, you can enable notifications where you can hand pick the actions you want to be notified of.

Agent and group creation

Once the helpdesk is set up, you can add support agents and create separate groups for each team. This helps assign the tickets to respective groups without any confusion. Plus, you get to determine which actions the agents can perform within the helpdesk. Right from ticket access to shift hours, every factor can be customized on both group and individual basis.
Chapter 02

Adding Support Channels

- Chat support
- Phone support
- Twitter support
- Facebook support
- Website support
Chat support

By integrating Freshchat with Freshdesk, you can enable chat in your customer portal. The conversations can be converted into tickets, mapped to different teams and followed up proactively. Apart from this, Freshchat can be synced with your knowledge base, incorporated in all of your channels and integrated with external apps to obtain customer information.

Read More →

Phone support

You can make/receive calls using Freshdesk by integrating with Freshcaller, the cloud-based phone system. Whenever a customer calls, you get notified whereas the missed calls get listed as tickets. You can also use Freshcaller to route calls, based on agent availability, and also take notes while attending.

Read More →

Twitter support

Logging into Twitter to check if there have been any tweets or DMs can get exhausting. Here’s where adding your brand’s Twitter handle to Freshdesk can be of great help. The tweets, DMs, and even brand mentions get displayed as tickets.

Read More →
**Facebook support**

Adding your brand’s Facebook page to Freshdesk enables you to respond to your visitor’s posts and comments. While DMs become tickets by default, you can decide which posts or comments need to be converted into tickets through keyword filters. There’s also ticket threading interval that puts multiple messages from the customer under a single ticket during the specified period of time.

Read More →

**Website support**

You can obtain customer feedback by placing ticket forms either as a pop-up widget or by embedding it in your website. You can customize the ticket form and add capabilities like file attachment, search option, mobile view in both types of widgets. This form acts as the first line of deflection and enables proactive reach out when customers are frustrated.

Read More →
By default, Freshdesk logo and favicon will be reflected on the helpdesk portal. You can rebrand these by updating your brand’s logo and favicon. Freshdesk also lets you customize almost every element right from portal color to font style. This will make it easier for customers to identify when they log into the portal.
Chapter _ 04

Productivity Hacks

• Tags
• Dispatch’r
• Canned responses
Dispatch’r empowers you to create rules on incoming tickets and thus automate your support workflow. For example, you can set a rule that every incoming email ticket with the word ‘problem’ should be replied with ‘we have received your request’. This way, you can use Freshdesk to set various conditions and minimize the repetitive tasks that affect agent productivity.

Canned responses
Typing out the same response, over and over again, affects your productivity. With Freshdesk, you can overcome this problem using canned responses. You can create any number of reply templates for various situations and categorize them into folders. Whenever a repetitive issue comes up, all you need to do is click the canned response icon and attach a suitable response. You can also find the required template or article with the help of keyboard using quick actions.

Tags
While groups are a great way to categorize teams, there might be different responsibilities within each team. For example, your billing team might have different agents to handle refund and payment failure issues, respectively. Here’s where you can use tags to classify the tickets so that agents can find the issue type at a glance.

Read More ➔
Chapter 05

Smart Helpdesk Management

• Public and private notes in tickets
• Ticket activities
• Merge tickets
• To-dos
• Freshconnect collaboration
Public and private notes in tickets

A complex issue will require multiple teams to work together. Adding private notes to the ticket lets you highlight complications to concerned agents or teams, as and when they arise. Similarly, you can add public notes if you want to inform the customer.

Read More

Ticket activities

Getting the context of an issue gets difficult especially when the ticket is moved between different teams. A briefing is required every time the ticket goes to another team thereby leading to endless loops. This is where ticket activities allows you to view the history of a ticket right from its creation.

Read More

Merge tickets

Every now and then, a customer might contact you through different channels for the same issue. Or sometimes, many people might report the same issue. In both cases, a lot of tickets are created, leading to chaos. Freshdesk gives you the option to merge all these tickets in chronological order. You can add/remove tickets from the merge, include private notes, and notify the customers.

Read More
To-dos

With Freshdesk, you can maintain a to-do list right within the helpdesk. You can either add a to-do task within the ticket, which can be seen by all agents, or add it to your own dashboard. You can mark the checkbox accompanying the to-do task when it’s done.

Read More →

Freshconnect collaboration

When you need the help of another agent or team to resolve an issue, you can collaborate right inside Freshdesk using Freshconnect. All you need to do is start a discussion from the ticket page you want to collaborate on. This way, the collaborator will be able to view the ticket and won’t need any briefing. You can also invite non-agent members outside your organization for collaboration. Nevertheless, your helpdesk will stay safe as they will be able to see only the ticket you’ve shared.

Read More →
Chapter 06

Self Service

- Knowledge base
- Email to knowledge base
When there’s a constant flow of basic questions like how to log in or how long the delivery will take, your agents won’t be able to focus on the serious issues. Which is why creating a knowledge base with all the FAQs and policies will reduce the number of repetitive questions. This way, your customers won’t have to wait for a long time. They can visit the knowledge base and get their doubts clarified instantly. Plus, with Freshdesk, you can categorize the knowledge base articles, control their visibility on an individual level and customize meta information for better ranking.

You can update your knowledge base as and when you’re replying to customers. Your Freshdesk account will have a knowledge base email ID to which you can send a copy of your reply. It will be saved in the drafts folder which can be modified and published as a solution article any time. You can also send the older replies to the knowledge base by forwarding them.
Chapter _ 07

Reporting

- Default dashboard
- Ticket volume trends
The dashboard lets you know what's happening inside the helpdesk. Be it ticket trends, recent activities, or to-do list, you can view them all in one place. In higher plans, you will be able to see available agents, arcade, forums, and more.

Freshdesk helps you analyze the ticket flow and derive insights to stay organized. Using ticket volume trends, you can check the number of received, resolved, and unresolved tickets over any time period. There's load analysis which gives the ticket volume in comparison with total load. You can also find out the day and time when most tickets were received and resolved in your helpdesk.
Chapter 08

Security

- Single sign on & SSL certificate
- DKIM configuration
When you enable single sign on, your customers won’t have to create a separate account to access your support portal. They will be able to log in using Twitter/Facebook/Google credentials. Apart from this, Freshdesk offers a default SSL certificate that enables data encryption and secure connection.

Read More ➔

Many a time, the email sent from your portal might end up in the customer’s spam folder. To avoid this, you can set up DKIM (DomainKeys Identified Mail) which generates a digital signature for your domain name. This way, whenever a message is sent from your side, it is identified as an authentic source. In addition, it also prevents others from duplicating your organization.

Read More ➔
Looking for a helpdesk software that’s a right fit for your business?

TRY FRESHDESK