Dapper Desk Feature Set

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Dapper Desk Feature Set & How It Improves The Efficiency Of A Support Department

Most of the advanced features are included in the base version!

If you are reading this, then you are probably tasked with finding a suitable software product to help you improve your ability to support your customer base. Undoubtedly, before your search is over, you will have reviewed dozens of help desk/CRM products with a myriad of different features. You will probably notice that most of the products you review do not have all of the features that you require. In short, it is difficult to find the one piece of software that will do everything you need it to do.

Dapper Desk is different. We are always willing to listen to our customers. Almost every feature that you will find in our software has come about as a direct result of a customer's request. It is not uncommon for a customer to purchase a current version of our help desk, request a new feature, then find that the new feature is implemented in an upgraded version a few weeks later. What matters to our customers, matters to us. Dapper Desk's feature set is a testament to this fact.

It is our goal to make Dapper Desk simple to use, even as the software continues to grow in complexity of its features. We consider how our customers will use Dapper Desk, and we then program the Dapper Desk interfaces so that our customers can understand clearly how things work.

We therefore invite you to review our list of features in Dapper Desk. After you are done reading this white paper, be sure to visit http://www.dapperdesk.com/ for a free online demo.

Customer Features (Access Level 1)

Creating Tickets

- Customers can create a help desk account, which will contain their name, company name, telephone, email, etc. This info is associated with each of their tickets so the customer service rep is always aware of whom each ticket belongs to.
- Customers can create a help desk ticket by logging into the help desk or they can send an email to your support email address, and the help desk will turn the email into a help desk ticket.
- Customers who have logged into the help desk to create a ticket will follow the course of their tickets by logging into the help desk.

- Customers who have sent an email to open a ticket will receive replies to their emails in their email inbox. They do not need to login to the help desk, unless they choose to.
- Customers can update their tickets at anytime to add new information or to respond to a CSR.
- Each ticket the customer opens receives a unique tracking number, which allows the help desk to keep track of the ticket.
- Each ticket is timed so the customer and the CSR is aware of how long the ticket has been opened.
- Tickets, which are opened longer than a pre-set time, receive special attention by being "escalated". Escalation means that the help desk manager will receive an email noting that the ticket has been open too long. A special icon will be visible to the CSRs noting the ticket has been escalated.
- A customer can close their own ticket at any time, relieving the CSR crew from closing the ticket for them. This is useful when the customer opens a ticket, but later solves their own issue.
- When a customer service rep finalizes a ticket, the customer has the opportunity to grade the performance of the support staff concerning each ticket.

Statistical Reporting

- Customers can view the amount of time each of their tickets is open. A running total is displayed and also, when a ticket is closed, the final total is displayed to the customer.
- Customers can see the name of the CSR who first responds to their ticket. They can also view the amount of time each ticket is open before the first response is made.
- If enabled by the help desk administrator, the customer can view the "pace of support" in their interface. The pace of support averages the first response time of the previous 25 tickets, giving the customer an idea of how long it will take for them to receive a response.
- The customer can view their closed tickets at any time.

Other Features

- If enabled by the help desk manager, urgent customer service alerts will be displayed to the customer/end user upon login to the help desk.
- Latest news topics are displayed to the customer upon login.
- If enabled by the help desk manager, the customer can change their help desk theme/color scheme.
- The customer can view frequently asked questions and answers, which the help desk administrator has added to the included FAQ software.
- If enabled by the help desk manager, the customer will be shown a list of relevant FAQ topics when they create a new ticket based on their subject or category of their ticket. This helps the customer to solve his or her own issue before entering a ticket.

- Customer is shown a display of which CSRs are online when they login (May be disabled or enabled by help desk manager).
- If enabled by the help desk manager, the customer will be displayed a link for a pop-up live help system (Pop-up live help is an add-on feature).

Customer Service Rep Features (Access Level 2)

CSR Access and Permissions

- The Customer Service Rep (CSR) can be given regular or administrative access. Administrative access will give them additional permissions such as the ability to add/edit CSR permissions, viewing help desk statistics, and editing help desk settings.
- The administrator can decide which categories of tickets each CSR can view and answer, or they can allow them to answer any and all tickets. This is helpful, for example, if you have a CSR that needs to answer only billing questions. You can give them access only to billing tickets and they will only see those tickets and nothing else.
- CSRs can update their password, email address, etc.
- CSRs can choose how they want to view tickets in their interface. For example, they can view tickets in the default view, where the ticket is displayed in 1 column, or they can view the tickets in the "succinct" view, which displays tickets in dual columns.

CSR Responding/Editing Tickets

- CSRs can respond to customer tickets according to the permissions given to them by the help desk manager.
- CSRs can create tickets on behalf of a customer. This is helpful if your customer service reps take telephone support calls. While taking the call, they can create a ticket for the customer in order to document the call.
- CSRs can view current open tickets and tickets that are closed.
- CSRs can search for tickets via username, customer name, company name, ticket number, customer text and CSR text.
- CSRs can search customer information via name, company name, username and email address.
- CSRs can assign tickets to other CSRs. This is helpful if you have CSRs that specialize in certain areas.
- When a ticket has been assigned to you by another CSR, it is displayed apart from the regular queue so you will realize it needs attention.
- When a CSR responds to a ticket, the customer will receive a courtesy, automated email to let them know that their ticket has been updated.

- CSR may add a start date for a ticket if desired. This is helpful if the help desk manager uses the help desk to assign work to the CSR crew.
- CSR can view a customer's previous tickets from within the ticket view. This is helpful if a customer refers to a previous ticket #. The CSR can then click a link that pops up a list of their previous tickets so the CSR can view them in detail, without having to close the original ticket.
- CSR Notes. Any CSR can add private notes to a ticket to help others who may be working on a ticket. Private notes are not visible to the customer.
- There is a field to add additional email addresses to receive results of a ticket response by a CSR.

CSR Miscellaneous Features

- CSR task manager allows the CSR to add notes to themselves by creating and editing tasks in their private task manager interface. They can reassign their own tasks to other CSRs when necessary.
- General Ticket Summary. The CSR can view a brief summary of open tickets including the number of tickets in Open, New, Updated and Emergency status.
- CSR 30-Day Stats. Each CSR is shown a graphical analysis of their 30-day ticket stats. This includes the number of tickets they have answered in the previous 30 days, the number of tickets they have been the first responder on, and the number of tickets which customers have graded them as excellent or unsatisfactory.
- CSR can view latest news topics from the help desk manager.

Help Desk Manager and Administrative Features (Access Level 3)

- Help Desk Manager can add/edit/delete Customer Service Rep accounts.
- Give CSRs access to tickets in all categories, or give them access to specific categories.
- Add/edit/delete customer accounts.
- Choose default theme
- Allow/disallow customers to change their theme or use the default theme.
- Edit help desk settings
- Add news items displayed to customers and CSRs.
- Customize auto-response emails sent by help desk.
- Customize how tickets are displayed to customers and CSRs.
- Turn system sound default on or off.
- Turn live-help on or off. Requires purchase of the Dapper Desk live help module or a third party live help software. When on, the customer will see a link to use Live Chat to contact customer service.

- Add special notes to customer's create ticket interface to prompt customer to add additional info to their ticket. This is helpful if you need to remind your customer to include specifics such as username, location, etc., or other things that are essential in order for your CSRs to respond properly to the customer.
- Add custom status codes.
- Add custom ticket categories.
- Add/Edit/Delete customized auto responses. For example, let's say that your CSRs commonly must ask your customers for their username and password. You can create an auto response that asks them to provide this info. Then, instead of typing it, you simply use a drop down menu in the ticket view to choose this auto response by title. Then, when your CSR updates the ticket, the text of the auto response is inserted into the ticket, just as if the CSR had typed it themselves.
- Turn latest news feature on or off.
- Turn CSR task manager on or off.
- Turn graphical statistics on or off.
- Turn new ticket FAQ display on or off.
- Turn "Display CSRs when online" feature on or off.
- Turn billing module on or off (Add-on feature).
- View help desk logs

Other Miscellaneous Help Desk Features

- Three (3) levels of access.
- Unlimited CSRs and Help Desk Managers.
- Unlimited customers/end users.
- Graphical statistics of CSR performance, categories of tickets, date range search for statistics and much more. Exportable via CSV.
- Email verification. (Anti-Spam). When a customer sends an email to your support email for the first time, they will receive an automated response from the help desk to click the link in the ticket to verify that they want to open a ticket. When they do this, the help desk adds their email address as a verified address and will accept future emails from them without further verification. This keeps spam email from filling up the support queue as spammers are lazy and will not usually take the time to verify an email address.
- Power Menu. CSRs and help desk managers can use a power menu when they login. A power menu is a setup customizable links set in a right side frame next to the main help desk. It is useful if your CSRs have a custom set of links they will use to provide support to your customers. The power menu can be turned on or off.
- Email Promo Message. Add a custom message to the bottom of all help desk automated emails sent to customers.
- PDA Module. Do you use a PDA such as the HipTop, Palm Pilot, or Treo? We have an add-on module that customizes the Dapper

Desk interface so that it fits neatly on the smaller screens. (Add-on module).

- Live Help Module. Offer live chat to your customers. Integrates into the customer screens and displays an online status icon to show whether your CSRs are available for live chat or not.
- Frequently Asked Questions. We include FAQ software. All you need to do is add topics and answers. The FAQ topics and answers are displayed to your customers when they need them.
- Billing module. Add time estimates and actual time spent on each ticket. Gives running total based per CSR, per customer and other parameters. Database export feature allows you to export data from Dapper Desk via CSV into other billing programs. (Add-on Module).

Summary

Though we hope to give you a good idea of the incredible amount of useful features contained within Dapper Desk in this white paper, it is not easy to conceptualize just how easy Dapper Desk is to use unless you try it for yourself. Please take the time to visit our site at http://www.dapperdesk.com and try our online demo today. It will be well worth your time.

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