

ZENDESK HELPDESK USER GUIDE



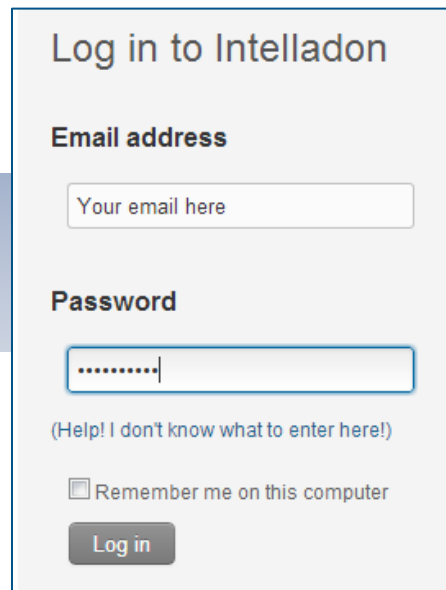
Technical Support

ACCESS THE ZENDESK HELPDESK

The Zendesk Helpdesk provides Intelladon clients with improved access to the technical support process. Clients are encouraged to actively participate and track the progress of their support issues, which further enhances Intelladon's quality of service.

If Intelladon has assigned you with an account, you should be able to login to the site. Please use the address below to access Intelladon's technical support system:

<https://intelladon.zendesk.com>

A screenshot of a web login form titled "Log in to Intelladon". The form is light gray with a thin blue border. It contains two main input sections: "Email address" with a text box containing the placeholder "Your email here", and "Password" with a text box showing masked characters ".....". Below the password field is a link that says "(Help! I don't know what to enter here!)". At the bottom of the form is a checkbox labeled "Remember me on this computer" and a dark gray "Log in" button.

Log in to Intelladon

Email address

Your email here

Password

.....

(Help! I don't know what to enter here!)

☐ Remember me on this computer

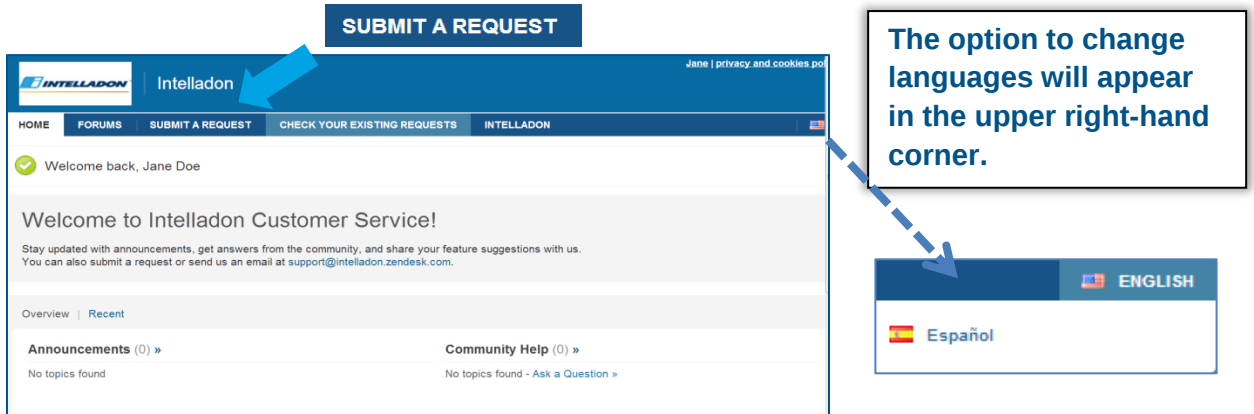
Log in

If you do not have a user account, please contact
Intelladon

HOW TO: SUBMIT A NEW TICKET

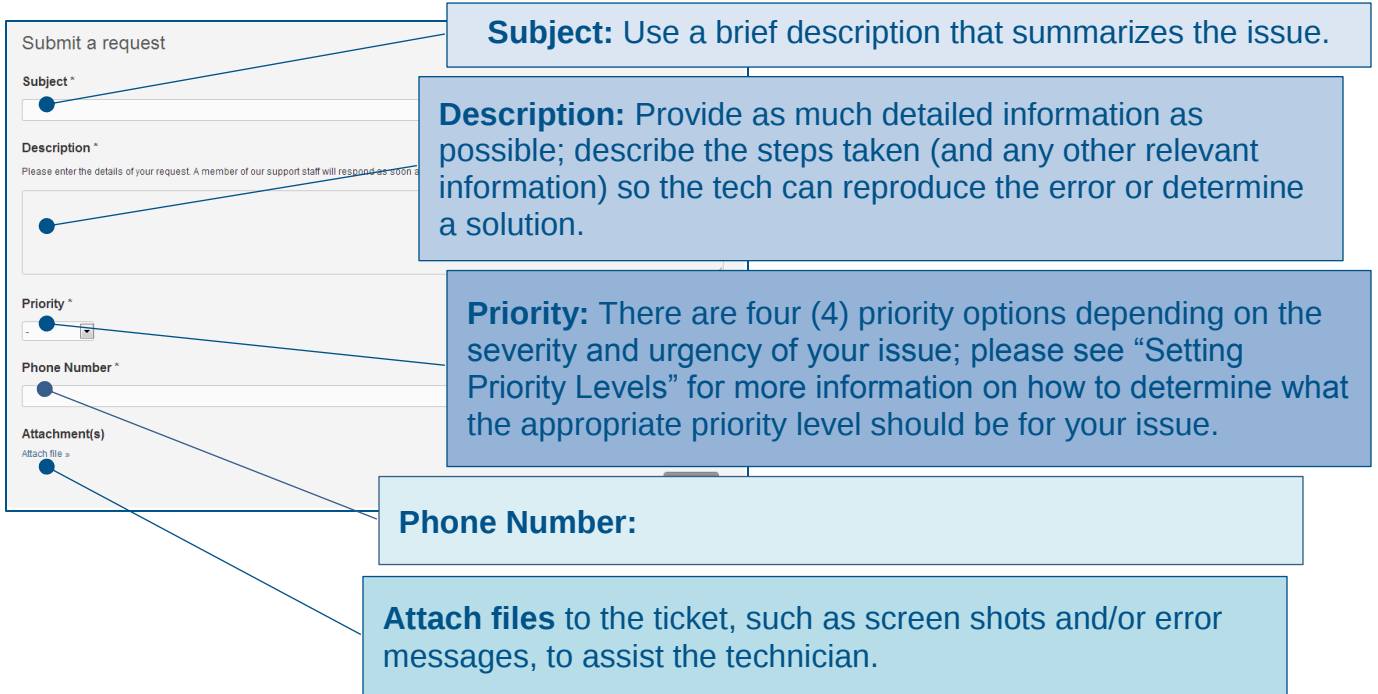
Once you login to the site, you will see the existing tickets for the users at your company.

1) Click on the Submit a Request link in the upper, left corner of the screen.



The screenshot shows the Intelladon website interface. At the top, there is a navigation bar with the Intelladon logo, a user profile 'Jane | privacy and cookies pol', and a 'SUBMIT A REQUEST' button. Below the navigation bar, there is a welcome message 'Welcome back, Jane Doe' and a 'Welcome to Intelladon Customer Service!' section. The language selection menu is visible in the upper right-hand corner, showing 'ENGLISH' and 'Español' options. A callout box points to the language selection menu with the text: 'The option to change languages will appear in the upper right-hand corner.'

2) Complete all of the required information in the five fields provided on the ticket form; attach any files that should be included.



The screenshot shows the 'Submit a request' form with five required fields: Subject, Description, Priority, Phone Number, and Attachment(s). Each field has a callout box explaining its purpose:

- Subject:** Use a brief description that summarizes the issue.
- Description:** Provide as much detailed information as possible; describe the steps taken (and any other relevant information) so the tech can reproduce the error or determine a solution.
- Priority:** There are four (4) priority options depending on the severity and urgency of your issue; please see "Setting Priority Levels" for more information on how to determine what the appropriate priority level should be for your issue.
- Phone Number:**
- Attach files:** Attach files to the ticket, such as screen shots and/or error messages, to assist the technician.

3) Once you have completed the information, click the "Submit" button. You will be taken back to your current ticket screen.

SETTING PRIORITY LEVELS

Please remember...

When submitting your ticket, gauge the priority level in accordance to the guidelines provided below.

Your assistance in helping us manage your tickets by priority level is appreciated; it is difficult to efficiently manage a process if every ticket is submitted at an “urgent” priority level.

EMERGENCY	Emergency issues should only be used when you are unable to access your site. These issues will probably start as a telephone call to Intelladon, which we will then turn into a ticket in Zendesk. If your site is live and you can access it, the issue should not be classified as an emergency.
URGENT	Urgent issues should be those pertaining to an immediate business requirement, or those that you need addressed within 24 hours, if not sooner.
NORMAL	Most issues should be the Normal priority, which is the default setting for a new ticket. If your issue does not meet one of the other options, select Normal. If you have a deadline by which you need the issue resolved, be sure to indicate this in your Description.
LOW	Low priority issues would be those that do not need to be resolved, but would improve your site use. For example, a low priority issue would be an idea to make the site better, an “enhancement” request so to speak. Other issues may include developing procedures to better meet your needs.

Intelladon may reprioritize your ticket based on the information you

SAMPLE TICKET

In the example below, a ticket is submitted for a problem associated with the automatic assignment of courses to users within the Enterprise Knowledge Platform (EKP) Software.

- 1) Notice the Subject of the ticket: Courses are not auto-enrolling users. The subject clearly states the issue; it is also a useful way to identify the ticket for future reference if necessary.
- 2) In the Description field, include as much detailed information as possible about the issue. Describe the steps taken to reproduce the error, and include any other relevant information that will aid the technician in determining a solution.
- 3) There are four options for Priority. We understand that all issues are important, but we ask you to assist in gauging how critical the issue is in your ability to access your site.
- 4) Include a phone number where you can be reached.
- 5) If you need to attach a file, click on the attach files link. Browse and attach the file. This is a great way to include a Word document of Screen Shots of the problem.
- 6) Once you have completed the information, click the “Submit” button. You will be taken back to your current ticket screen.

1

2

3

4

5

Submit a request

Subject *

Description *
Please enter the details of your request. A member of our support staff will respond as soon as possible.

We have set our "New Employee Orientation" course to automatically enroll new users. However, when we add users to the system, they are not being enrolled in the course. One example is Jane Doe - she was added last Monday, but when she logs in she doesn't have the course.

Priority *

Normal ▾

Phone Number *

Attachment(s)
[Attach file »](#)

6

Submit

AUTOMATED EMAIL

As we work on your issue, you will receive various automatic e-mails from the system.

Your request (#106) has been received and is being reviewed by our support staff.

To add additional comments, reply to this email or click the link below:

<http://intelladon.zendesk.com/requests/106>

Please do not send a reply back to the automated email; instead, just click on the link to log back into the Zendesk Helpdesk site.

Sample Customer

May 17 13:22 (EDT)

We have set our "New Employee Orientation" course to automatically enroll new users. However, when we add users to the system, they are not being enrolled in the course. One example is Jane Doe – she was added last Monday, but when she logs in she doesn't have the course.

Your request (#106) has been updated. Reply to this email or click the link below:

<http://intelladon.zendesk.com/requests/106>

The ticket status has changed; the technician is requesting additional information.

Click on the link to take you back to the Zendesk site.

Technician Intelladon)

May 17 13:25 (EDT)

Please review the Auto-Enroll Console to make sure you have set it to every log in.

Technician

Sample Customer

May 17 13:22 (EDT)

We have set our "New Employee Orientation" course to automatically enroll new users. However, when we add users to the system, they are not being enrolled in the course. One example is Jane Doe – she was added last Monday, but when she logs in she doesn't have the course.

UPDATING A TICKET

When you log back into Zendesk, click on the 'Check Your Existing Requests' link (at the top) to see your tickets.

First, you may need to review the discussion on the ticket.

Intelladon

HOME FORUMS SUBMIT A REQUEST CHECK YOUR EXISTING REQUESTS INTELLADON

Request #106 "Courses are not auto-enroll..." updated

Open requests

Detailed list | Compact list

#106 Courses are not auto-enrolling users

We have set our "New Employee Orientation" course to automatically enroll new users. However, when we add users to the system, they are not being enrolled in the course. One example is Jane Doe - she was added last Monday, but when she logs in she doesn't have the course.

Submitted 9 minutes ago

Being processed. View request history »

Scroll to the bottom and read the 'Comments' section. This will be in reverse order, with the oldest comments at the bottom.

Intelladon

HOME FORUMS SUBMIT A REQUEST CHECK YOUR EXISTING REQUESTS INTELLADON

Request #106

Courses are not auto-enrolling users

Sample Customer
May 17 13:22

We have set our "New Employee Orientation" course to automatically enroll new users. However, when we add users to the system, they are not being enrolled in the course. One example is Jane Doe - she was added last Monday, but when she logs in she doesn't have the course.

Comments

Please review the Auto-Enroll Console to make sure you have set it to every log in.

Technician
May 17, 2013 13:25

Add a comment to this request

I have verified the settings

Sample Customer
Intelladon

Attach file »

Comments

Please review the Auto-Enroll Console to make sure you have set it to every log in.

Technician

May 17, 2013 13:25

UPDATING A TICKET

The screenshot shows the Intelladon user interface. At the top is a navigation bar with links: HOME, FORUMS, SUBMIT A REQUEST, CHECK YOUR EXISTING REQUESTS, and INTELLADON. Below this, the 'Request #106' section displays the title 'Courses are not auto-enrolling users', a user profile for 'Sample Customer' (May 17, 13:22), and a description of the issue. A 'Comments' section follows, showing a technician's response from May 17, 2013. At the bottom, there is a 'Add a comment to this request' section with a text input field containing 'I have verified the settings.', an 'Attach file »' link, and a 'Submit' button. A blue arrow points from the 'Attach file »' link to a callout box, and another blue arrow points from the 'Submit' button to another callout box.

In this case, the technician is asking the client to confirm a setting in the EKP software.

The response should be detailed, and based on the last comment.

Attach files here by clicking the link.

Once you have entered the information, click the 'Submit' button.

Some issues may require multiple updates and exchanges between you and Intelladon; usually updates will include requests for additional information and/or for certain tasks to be performed-- like checking settings or verifying information.

For every status update, you will receive an automated email. Each time, you will log into Zendesk to update the ticket.

SOLVED TICKETS

Once Intelladon has resolved the issue, the ticket status will be updated (as noted in the email below), you will then need to login to Zendesk to view the solved status and confirm the solution.

Your request (#106) has been updated. Reply to this email or click the link below:
<http://intelladon.zendesk.com/requests/106>

Lorraine Harbert (Intelladon)

May 17 15:11 (EDT)

Okay. I checked your course, and the organization was not set correctly. Please change to include the correct organization.

Lorraine Harbert

Please do not send a reply back to the automated email; instead, just click on the link to log back into the Zendesk Helpdesk site.

To learn more about providing feedback, please see the “Closing the Ticket” section on page 10.

✓ Welcome back, Sample Customer

The technician has verified that a setting within EKP was incorrect. The proposed solution is to change the organization setting. The ticket status has been updated to solved.



Sample Customer
May 17 13:22

We have set our "New Employee Orientation" course to automatically enroll new users. However, when we add users to the system, they are not being enrolled in the course. One example is Jane Doe - she was added last Monday, but when she logs in she doesn't have the course.

Comments

Please review the Auto-Enroll Console to make sure you have set it to every log in.
Technician

May 17, 2013 13:25



I have verified the settings.

May 17, 2013 13:30

You can reopen this request by adding a comment.

Once logged into Zendesk, you can view the 'solved' status (on the right).

CLOSING TICKETS

When your issue has been resolved and the ticket status has been updated to solved, please provide your technician with some feedback.

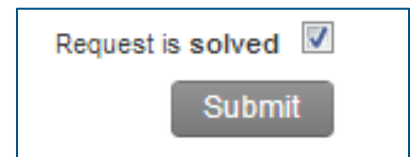
HOW DID WE DO?

When rating the quality of service that you received from Intelladon, please consider the following:

- Often times, the solution is based on the capabilities—or limitations – of the software.
- Some issues require Intelladon to work directly with the software publisher – this can cause a delay in our ability to resolve the issue quickly.
- Rate the *quality of service* you received from the technician versus rating the solution.

1) Click on 'Request is solved' checkbox.

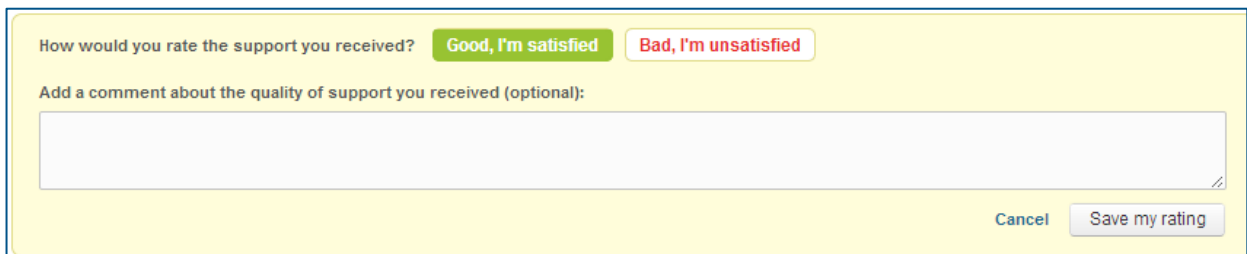
After you close the ticket, you will still be able to view the ticket, should the same issue recur in the future.



A screenshot of a user interface element. It features a label "Request is solved" followed by a checked checkbox. Below this is a grey button with the text "Submit".

2) Rate the quality of service.

Add a comment about the quality of support you received. Click 'Save my rating' once complete.



A screenshot of a feedback form. At the top, it asks "How would you rate the support you received?" with two buttons: "Good, I'm satisfied" (green) and "Bad, I'm unsatisfied" (red). Below this is a text input field with the placeholder "Add a comment about the quality of support you received (optional):". At the bottom right, there are two buttons: "Cancel" and "Save my rating".

FORUMS

Click the 'Forums' link to view announcements, learn tips and tricks on navigating the system, join a community of users and customer service pros, and suggest ideas on feature upgrades or changes.

The screenshot shows the Intelladon website's forum section. At the top is a blue navigation bar with the Intelladon logo and the text 'Intelladon'. Below this is a secondary bar with links: 'FORUMS' (highlighted with a blue arrow), 'SUBMIT A REQUEST', 'CHECK YOUR EXISTING REQUESTS', and 'INTELLADON'. The main content area is titled 'Forums' and includes a search bar with a magnifying glass icon and a 'Search' button. Below the search bar are four categories: 'Announcements (0) »', 'Community Help (0) »', 'Tips & Tricks (0) »', and 'Feature Requests (0) »'. Each category has a sub-link: 'No topics found', 'No topics found - Ask a Question »', 'No topics found - Add Article »', and 'No topics found - Suggest an Idea »' respectively. Four callout boxes with blue arrows point to these sub-links: 'Click 'Ask a Question' to ask a community of users and experts detailed questions.' points to 'Ask a Question'; 'Click 'Add Article' to suggest Tips & Tricks to other users.' points to 'Add Article'; 'Click 'Suggest an Idea' to request feature upgrades or changes.' points to 'Suggest an Idea'; and 'Click 'Ask a Question' to ask a community of users and experts detailed questions.' points to 'Ask a Question'.

Intelladon

FORUMS SUBMIT A REQUEST CHECK YOUR EXISTING REQUESTS INTELLADON

Forums

Overview | Recent

Announcements (0) »
No topics found

Community Help (0) »
No topics found - Ask a Question »

Tips & Tricks (0) »
No topics found - Add Article »

Feature Requests (0) »
No topics found - Suggest an Idea »

Click 'Ask a Question' to ask a community of users and experts detailed questions.

Click 'Add Article' to suggest Tips & Tricks to other users.

Click 'Suggest an Idea' to request feature upgrades or changes.

If you have any questions about this guide, please feel free to contact our technical support team by sending an email to: techs@intelladon.com