FreshDesk for managing Digital queries

Introduction

If a rebel has a technical query, problem or suggestion, they can ask in the Mattermost channel **Tech Reception**.

If you don't use Mattermost send an email to **tech@rebellion.earth**. This generates a ticket on **Freshdesk** and an agent will deal with the enquiry. Some queries first raised in **Tech Reception**, e.g. for GDPR are passed on to Freshdesk.

For a general, non technical enquiry, instead send an email to **enquiries@extinctionrebellion.uk** which will also generate a Freshdesk ticket which is dealt with by the Reactive team.

Freshdesk is a help desk customer support system supplied by Freshworks and described by them as “a cloud-based customer support software that is both feature-rich and easy to use. With multiple support channels available, including live chat, email, phone, and social media, you can help customers through their preferred communication method”.

XR has the free version with only basic functionality.

The product owner of all instances of Freshdesk is still to be agreed, likely to be a Digital IC.

There are other instances (separately installed copies of the software) of Freshdesk not covered here used by the Reactive team and the Pathways team. The Reactive team may pass on tickets to Digital if they believe they are best managed here.

Tickets created in Freshdesk can only be managed by Freshdesk agents, one of whom should own a ticket until it is closed. There are 4 levels of access for agents and this guide only covers the lowest.

1 agent should act as triage to read and assign each new ticket to an agent with appropriate skills but they may in turn reassign it if agreed. An agent may seek help from a non agent, i.e. someone else in XR if they have the skills to resolve it.

Source of tickets

Rebels use Digital's instance of Freshdesk by sending an email to **tech@rebellion.earth**. This email address is advertised in RT, Telegram, email responses to new Hub users and in some external news websites such as BBC.

Krystal (**is this software embedded in the mail server?**) redirects this to **xrsupport@freshdesk.com** which creates a ticket on Digital's **FreshDesk** instance **xruk.freshdesk.com** with the email message.

If anyone ticks Unsubscribe on an XR message, a notification goes to the GDPR team (I don't know how) and they create a ticket via an email to **tech@rebellion.earth.**

Freshdesk cannot distinguish between email traffic and feeds to Freshdesk via the link email address **support@xruk.freshdesk.com**. (**Please explain.** Are there simply 2 email addresses linking to Freshdesk?)

The email address of the originator of the query is passed through this process such that when an Agent replies to the FreshDesk ticket the reply is sent to the originator, not back to tech@rebellion.earth.
Our FreshDesk instance allows us to track responses to these queries and provide feedback to both the original enquiring rebel and the various support functions within XR UK.

When an email is received, it triggers an automatic reply back to the requester :

Dear "Requestor",
Thank you for your email. We have received your request and a ticket has been created (**explain what is a ticket?**). We are staffed by part time volunteers, so please be patient with us - we will get to your request as soon as possible.

There is growing collection of useful articles on our knowledge base - this is limited at the moment but we aim to grow it as quickly as possible. Have a look and see if it helps.

To view the status of the ticket or add comments, please visit
https://xruk.freshdesk.com/helpdesk/tickets/123456789

Love and rage, XR Tech

The above **Knowledge Base** link takes the requester to links telling them how to use Action Network, Freshdesk etc. There is little there which should be removed and a link created to Rebel Toolkit, as our single surce of knowledge.

Levels of access by agents

There are 4 agent roles below in increasing order of privileges. (**This is best shown n a matrix**).

(**who can create / change other agents' access?**)

(**Only the agent role is described here and someone with higher access should describe their functions.**)
Agent Can view, respond to and assign tickets, as well as modify ticket properties.
Supervisor As Agent and can also enable automatic ticket assignment of the member groups under the Admin tab.
Admin As Supervisor and can edit configurations under the Admin tab, Can update the dropdowns in the Group and Type properties.
Account Admin As Admin and can edit billing and account management.

How to use Views

The left menu column is to choose what you want to view :

Dashboard : summary stats on tickets and recent agent activity. (**how are totals for Unresolved, Open and On hold calculated?**)
(2nd icon does not function for my basic agent access)
All tickets : for the triage and agents to manage tickets. This list has filters in the right column on several ticket properties and more filters in icon at top left (not sure if the 2 filters can be in conflict). **Why are there lots of Unresolved tickets here?**
The **More** link (3 vertical dots) has Edit ticket, Print and Spam reporting.
Top right has buttons for New, Search, Help and support.
Click a ticket to see an indidual **Ticket details.**
Ticket details show the email trail, its properties, the requester's contact details and a timeline (?)
Contacts and Companies : What contacts and what companies are shown? Should they be deleted for GDPR if not needed?
Reports & Analytics can't see this with my access
Admin (list of Agents, etc). Only for admin agents.
Knowledge Base (mouse over shows "Solutions")

Triage process

At any time, there must be 1 agent nominated as the triage who decides to whom a new ticket is assigned.
They access FreshDesk daily.

Analyse content of a new ticket

1. **Technical problem or query** - **TTA** responds or passes to the relevant agent (simplist is Tech Reception).
2. **Unsubscribe request** : Send PN to a member of the DDAT team (Tech Receptio?), who will find them up on the Hub and remove as necessary. Reply to requestor when UnSubscribe completed.

3. **Requests for removal of user information : (is un-subscribe different from data erasure?)** these tickets should be owned by an agent from the GDPR team and resolution must comply with GDPR. Other Digital teams help with the data erasure
4. **Subscribe Request - "add me to the Hub"** Send PN to a member of DDAT (Tech Reception) who will work out what sort of Hub Invite to send.(**where does the ticket originate?**)
5. **Action Network :** email database and Data Team enquiries. Send PN to Action Network Data Team Reception.
6. **General Tech Problem**
   If you know the answer, then reply directly.
   If not, establish which team is most likely to resolve the issue and contact them or Tech Reception if a Digital team. If it looks like the team is not in Digital, find their MM Reception.
7. **Website query on content or design**
   Send it to the reception channel for the XR team owning website content - Media & Messaging.
8. **Volunteers Website**
   Send the query to Pathways Reception.
9. **Foundation Programme**
   Send the query to Pathways Reception.
10. **XR email address requests or issues**
    Send email to Adrian P at Action Network Data team at adrian.xrsl@protonmail.com (is it better to use AN Data Team Reception?)
11. **Spam** : If it looks like spam, there is a drop down menu from **More** (3 vertical dots) on the Ticket screen that allows you to mark that individual ticket as spam. When you do you get the option to mark everything from that address as Spam. Freshdesk does not appear to have any native spam filter. For any egregious "unblockable" spam, go to the linked email account and set up a filter there.
12. **Other** if issue not covered by above, Agent can ask for more info from Requestor and/or research within XR to find potential resolution. The **TTA** should, therefore, have a reasonable working knowledge of the XR organisation, both UK and Global, or know whom to ask.

How an agent works on tickets

This is the dashboard

Freshdesk_Doc_01_Dashboard_24Mar22.jpg
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View all tickets and then use a filter to find those you wish to work on

Freshdesk_Doc_02_Current_Ticket_List_24Mar22.jpg
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New Queries are flagged (none in above screenshot). You then select a Query to see original request and any replies.

A typical query thread:

Freshdesk_Doc_03_Select_Ticket_List_24Mar22.jpg
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Resolving Tickets

Use the **Status** property when working a ticket to track its progress :

Open : initial value
Pending : help or advice is being sought by the agent. Set back to Open when response received.
Resolved : useful for problem resolution, but not needed.
Closed : after whatever action was needed has been taken and the requester has said it is ok. The requester may never respond, especially for a data erasure. Allow a reasonable time before closing. If there is a late response, the ticket can be re-opened.

Actions on a ticket

Reply to the requester giving further info or if questions needed. They will have had an inital email acknowledging the ticket.
Add note Allows you to pass the query on to another FreshDesk Agent. In addition, you can forward the email thread to non Agents using their own email. This is useful when responding to rebel's requests for support outside Digital e.g. Local Group Coordinators.

The Notes thread acts as an audit trail defining how the request is handled. If any TTAs go down a path likely to be repeated, or answer a question likely to be asked again, then they should contribute to more notes for other TTAs (destination for note / knowledge base yet to be determined) or they update info (FAQs?) on Rebel Toolkit if the information can be shared publicly.
Forward to another agent (same as Add note?)
Close sets Status
Merge ?
Delete

Properties of a ticket

To the right of the email thread are properties of the ticket.
Status : current status
Tags ?
Type : a drop list of types of query. Not sure if or how it is used.

Status : can be changed, see **Resolving Tickets** above.
Priority : seldom used
Group : only ever set to "Tech & infrastructure. (It could be used to show the team helping to resolve the ticket, if ever needed.)
Agent : (how does this work? Drop down is blank.

Requests from groups or teams to use Freshdesk

To start using FreshDesk for your XR Subgroup, you must have the following :

An email address that you are currently using to take on feedback/requests/tasks
A group of people (agents) who are willing to share out the tasks in the emails amongst them

Please send an email to support@xruk.freshdesk.com with the following information:

1. The subgroup your team is a part of
2. A list of agents emails you wish to initially onboard to that group and the workload
3. The email address you'll be forwarding from while using FreshDesk

END OF INSTRUCTIONS

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