# Table of Contents

**Introduction** 4

**Teamwork Products Quick Menu** 4

**Chapter 1 - Dashboard** 5
- Inboxes, Activity, Metrics 5
  - Inboxes 6
  - Activity 7
  - Metrics 8

**Chapter 2 - Tickets** 11
- Selecting Multiple Tickets 12
- Ticket Status 13
- Smart Inboxes 14
- Creating a Smart Inbox 14
- Viewing a Ticket 16
- Ticket Trash Can 17
- Creating a New Ticket 19
  - Replying Options 20
  - Ticket Information and Options. 21
  - Thread view 22
  - Message Forwarding Icons 25
- Right hand panel 26
  - Customer Info 26
  - Ticket Options 27
  - Followers 27
  - Time Tracking 27

**Chapter 3 - Help Docs** 28
- Creating a New Help Doc Site 29
- Creating Your First Help Doc Article. 29
  - Formatting Options 31

**Chapter 4 - Customers** 35
- Customer Profile - Edit 35
- Customer profile - History 37
- Create New Customer 38
- Upload Customers 38
- Customer Search 39

**Chapter 5 - Reports** 40
- Dates 40
Help and Support  61
Webinar Signup  62
What's New?  62
Settings  62
  Company Settings  63
    Edit Company:  63
    Spam control  65
    Custom Fields  66
    Ticket Sources  68
    Ticket Types  68
    Ticket Statuses  69
    Import data  69
    Import history  69
    Export Data  70
    Webhooks  70
    Time Tracking  70
User Settings  71
  Inviting or Creating Users  71
  Editing a User  73
  Permissions  74
Customer Portal Settings  74
  General Settings  75
  Appearance  77
Inbox settings  77
  Edit Inbox  77
  Inbox Permissions  82
  Auto Reply  83
  Canned Response  83
  Triggers  84
Help Doc Settings  85
  General Settings  86
  Site Information  88
  Contact Form  89
  Appearance Settings  89
    Colors  90
    Templates  90
    Custom code  91
  Categories  91
  Comments  93
  Tag Settings  94
  Sort Tags  95
To view the tickets listed under a tag:
To change the colour of a tag: 95
To merge tags: 95
To delete a tag: 96

Apps 96
Billing Settings 98
Usage 99
Billing History 101
Billing settings 101
VAT details 101

Log out 102
Introduction

Welcome to the Teamwork Desk user guide.

Teamwork Desk provides the option to handle all of your customer emails in one shared collaborative space. Desk has been built on our own experience of dealing with customer support queries and allows you to measure customer happiness, team productivity as well as the channels contacts are received on.

This guide has been created to help you familiarise yourself with Desk and the six main areas within it. Each section is fully explored and covers all settings and options available within them.

Further information can be found on the Teamwork.com Help Docs.

Teamwork Products Quick Menu

On the top right of any Teamwork product page you will see the Product Switcher icon. Clicking on this allows you to quickly navigate between Teamwork Projects, Desk and Chat.
Chapter 1 - Dashboard

When Desk is first launched you will be brought to the ‘Dashboard’ page. At top center you will see options for ‘Inboxes’, ‘Activity’ and ‘Metrics’. Below you will see the various inboxes you are subscribed to along with your unified inbox.

From the top right corner of the view you can access the Notifications, Product Switcher and your Avatar. The right sidebar includes an overview of performance metrics for the last seven days.

Inboxes, Activity, Metrics
There are three tabs at the top of your dashboard that will allow you to navigate quickly between sections.
Inboxes

The Inboxes section allows you to see an overview of all the inboxes you have access to within Teamwork Desk. You can navigate directly to a specific inbox by clicking on its name. You can see the following information for each inbox:

- **New**: Unassigned tickets that have not been answered.
- **Assigned**: Active tickets assigned to all users.
- **Mine**: Active tickets assigned to you.
- **Waiting**: Tickets in ‘Waiting on customer’ status.
- **On-Hold**: Tickets marked as ‘On-Hold’.
- **Spam**: Tickets that have been marked as spam.

If a unified inbox has been created it will show highlighted in green across the top of the inboxes. Information here will include a unified total of all selected inboxes.

To edit the inboxes on your personal unified inbox simply tick or untick the arrow next to the inbox image near the left-hand side.
Activity

In the activity section you can see a timeline of the most recent activity on tickets. You will be able to see if a ticket was assigned, resolved, replied to, put on hold etc.

Each action provides the following information:

- Who took the action.
- The ticket number and name.
- Time of activity (hover over this for exact time information).

The icons to the right of each action relates to the type of action that was taken:

- Indicates a change in status
- Wrote a reply
- Assigned the ticket to this person
- Wrote a note.
- Viewed the ticket
**Metrics**

The metrics page shows a visual representation of the data from your Teamwork desk site.

The date range of information shown can be changed to include the last 7, 14 or 31 days.

An option to ‘refresh stats’ can also be found directly across from the date range selection near the top right side.

The information shown within metrics include:

- Number of unique customers who have contacted you.
- Amount of unique tickets received.
- Average reply per ticket.
- Average time until the first response.
- Average resolution time.

The center of the page includes the main graph. This includes ‘Volume and first response times’. The nodes on the graph give more information on a specific date when hovered over.
Located below the ‘Volume and first response times’ graph are both ‘Tickets by Channel’ and ‘Top Agents’.

**Tickets by channel** provides a breakdown of which channel tickets came in from. This is determined by what you have set up on your account.

![Tickets by Channels](image)

**Top agents** provides a quick rundown of the top 5 agents by solved tickets and includes the following information:

- Name of agent and % of solved tickets.
- Number of replies.
- Number of solved tickets

<table>
<thead>
<tr>
<th>Top Agents</th>
<th>700 Replies</th>
<th>207 solved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shona Kelemen</td>
<td>11%</td>
<td>700</td>
</tr>
<tr>
<td>Aiden Kelly</td>
<td>10%</td>
<td>847</td>
</tr>
<tr>
<td>Seamus O'Kelly</td>
<td>10%</td>
<td>574</td>
</tr>
<tr>
<td>Steven Byrne</td>
<td>8%</td>
<td>607</td>
</tr>
<tr>
<td>Patrick O'Leary</td>
<td>7%</td>
<td>532</td>
</tr>
</tbody>
</table>

![Top Agents Table](image)
On the right-hand panel of the screen you will see your happiness rating.

You can see a breakdown of rating below.

Below the happiness rating you can see the list of inboxes you have access to. You can click on any of these to be brought to that specific inbox.

A condensed view of metrics can also be found within both the ‘Inboxes’ and ‘Activity’ tabs, on the right-hand side.

This view will show you:

- The Happiness rating of the date range you select.
- The number of unique customers who contacted you.
- The amount of unique tickets received.
- The amount of replies sent out.
- The Response time on all your tickets from all inboxes.
- The Response time on all your tickets from all inboxes.
Chapter 2 - Tickets

The ticket view within Teamwork Desk is the area where agents will spend most of their time. You can navigate to this by selecting the ‘Tickets’ tab from the top navigation bar. The inbox that will load will be your last viewed.

On the left of the ticket page you will see a list of inboxes you have access to, your unified inbox and any smart inboxes you have set up.

You can customize the column settings, by selecting the Customize Columns icon from the right corner of the column headings.

- **Customer**: The customer name, if using the unified inbox, this will also show the inbox that the ticket is housed in.

- **Assigned**: Whom the ticket is assigned to (Agent or Admin on the Desk site).

- **Status**: The current state the ticket is in.
ID: The Ticket ID assigned to the ticket.

Created: When the ticket was created.

Updated: The last time the ticket was updated, this can be a reply, a note, reassigning, moving or anything that changes the ticket

Priority: The priority that has been added to the ticket.

Spam score: This displays the spam score of the sender.

Type: The type of ticket.

Source: Where the ticket was created from.

Subject: The subject of the email that the customer has entered, it will also show a snippet of the text the customer has entered in the body of the ticket sent.

Selecting Multiple Tickets

Next to each ticket there is a checkbox, by selecting multiple tickets (or a single ticket) a popup will appear where you can quickly change the following:

Assign: Quickly assign the ticket or multiple tickets to a person.

Apply trigger: Apply a manual trigger to the ticket or to multiple tickets at once. If there is more than one trigger for that inbox you will be given the option of choosing one.

Status: Update the status of the ticket or tickets.
- **Set Tags**: Tag the selected ticket to tickets.
- **Move**: Move the ticket or tickets to another inbox.
- **Delete**: Delete the ticket or multiple tickets. If you delete a ticket you will be asked to confirm the deletion, please note that at this time this is final and cannot be retrieved so please be careful when deleting.

**Ticket Status**

Within each inbox there are various ticket status’ including:

- **New**: New tickets is the area where you can view the tickets that are unassigned. In general, these are the new untouched tickets sent to the inbox.

- **Mine**: The mine section is the area to view the tickets that are assigned to the person logged in and that are active.

- **Assigned**: The assigned section holds all the tickets that are active and assigned to all agents who have access to the inbox.

- **Custom status**: Within the settings section there is the option to create custom statuses, if you have these created they will show in the left-hand panel, within the customer statuses section you will see the tickets that are active and marked with that status.

- **Waiting on customer**: With the waiting on customer section you will see the tickets that have been marked by an agent as waiting on customer, there is a setting in the company settings that will auto close these tickets after 72 hours. Once a customer replies to one of these tickets they will be moved to the assigned section for the agent who replied.

- **On-hold**: This will show all the tickets that have been marked as on hold for all users who have access to the inbox.

- **Solved**: The solved section displays all the tickets that have been marked as solved, solving a ticket sends a happiness rating to the customer once per ticket, this section shows the solved tickets for all users on that inbox.
- **Closed**: The closed section displays all the tickets that have been marked as closed by agents on that inbox.

- **Spam**: The spam section will show any email that has been marked as spam by an agent or has been identified as spam based on the spam rating set in the setting section for that inbox.

**Smart Inboxes**

Smart inboxes are listed in the left column on the tickets screen, above your selected inboxes.

A smart inbox allows you to view a list of tickets based on conditions you have set.

The smart inbox ticket list is updated dynamically as soon as a ticket that matches the conditions comes in. This can apply even if it isn't a new ticket. For example, a smart inbox set up to view all your high priority tickets with a specific tag, or from a particular email address. If an existing ticket is updated to match these conditions, it will now show within the smart inbox.

**Creating a Smart Inbox**

You can create a Smart Inbox that is private to you or share them so other people can view them too.

**To create a new smart inbox** from the left-hand panel, select the smart inboxes option, this will expand and show and option for New Smart inbox. Select this option and you will be presented with a screen asking you to name the smart inbox.
Name: Enter the name for the smart inbox.

Description: Add a description for your smart inbox.

Is shared? This allows you to decide if it is just for you or to be shared with other people on your Teamwork Desk account.

Once you select the Next the step option you will be brought to stage 2. This is where you set the condition for the smart inbox and the grouping options.

Choose to add condition the conditions you select are what you are basing your smart inbox on, the options that can be selected from are:
Once selected you will be prompted depending on the option selected to enter the rest of the details.

Once you have selected and entered your details you can choose to add a secondary condition.

Finally choose your grouping option and select the next Step.

The final stage in setting this up is simply to review what you have entered and simply save the smart inbox, this will also show you how many tickets will be added to this smart inbox and also give you the preview option.

Once the smart inbox is created it will show in the left-hand panel under the Smart inboxes option.

**Viewing a Ticket**

When you select a ticket from an inbox the main purpose is to respond. There is a number of tools here to help with this, when responding you have the option to choose from 3 options:
**Reply:** The reply option is used to get back to the person who sent the ticket, enter in the field the text you wish to respond to your customer.

**Note:** The note option is used to add some details to the ticket either for yourself or your team, if you wish to notify someone of the ticket you can use @personsname in the body of the mail and an email notification will be sent to that person. The notes will only be visible to people who have access to the inbox, customers will never see the notes on the ticket.

**Forward:** This allows you to forward the ticket to a 3rd party, once you select this option you will be asked to enter the email address of the person you want to get involved, once the 3rd party respond it will be added to the ticket as a note, again this will not be visible to the customer.

**Ticket Trash Can**

Within Teamwork Desk you can delete tickets from any of your inboxes and they will be moved to the trash can.

**Note:** Tickets that are deleted and moved to the trash can will be automatically deleted after 30 days.

You can find the trash can by selecting the 'Tickets' option to the top of your Teamwork Desk page:

Within the left pane, to the bottom you will see the 'Trash' option:
When you select the trash option you can then view all deleted tickets in a similar way to how you would view one of your inboxes.

When you select a deleted ticket it will be displayed in a right pop out modal as a read only version, meaning you will not be able to reply to the ticket, change its status or change who it is assigned to.

To restore a ticket, first select the ticket you wish to restore from the trash which will then open in a modal to the right of the screen. Then select the restore option to the top right:

If you choose to delete multiple tickets at once, you will first need to select the tickets. Once you have more than one ticket selected a restore option will appear to the right of the trash can view:

**Note:** When a ticket is restored, it will return to its original inbox. If a user wishes to edit the ticket in anyway it will have to be restored first.

If a customer or inbox is deleted their tickets will not display within the trash can.
Creating a New Ticket

A new ticket can be created from under the inbox view in the left-hand panel. Selecting this option will bring you to a new ticket creation screen. The options on this screen are:

- **Customer Name**: The Customer’s name.
- **Customer email**: This allows you to specify from where the contact initiated.
- **Cc/Bcc**: Choose to add people to the cc/bcc sections.
- **Body**: The details you want to share with the customer.
- **Type**: This allows you to specify from where the contact initiated.
- **Source**: This allows you to specify from where the contact initiated.
- **Status**: Choose to set the status of the ticket.
- **Assigned to**: Choose to assign the ticket to an agent or yourself.
- **Tags**: Add any tags as necessary.
- **Send Message**: Save the ticket to add it as a ticket.

* Items marked with an asterisk are mandatory to fill, all others are optional.

Reparing Options

Within the ticket/note/forward option there is an editor available.
The options available within the editor are as follows:

- **Source code**: View the source code for the ticket you have written.
- **Undo/redo**: Choose to undo/redo.
- **Formats**: Select the format, options here are Headings, Inline, Blocks and Alignment.
- **Bold**: Gives the option to make the text bold when enabled.
- **Italic**: Gives the option to make the text Italic when enabled.
- **Align options**: Choose how you wish to align the text in your reply.
- **Bullet**: Choose to add bullet points to your reply.
- **Numbering**: Choose to add numbering to your reply.
- **Indents**: Choose the indent for your ticket.
- **Horizontal line**: Choose to enter a horizontal line into the ticket.
- **Link**: Insert a link into the ticket.
- **Images**: Embed an image into the ticket.
- **Canned responses**: Choose to add from a canned response that you have added to the inbox settings.
- **Adding a cc/bcc to the ticket**: Choose this option to add people to the ticket as either a cc or a bcc.
- **Formats**: Select the format, options here are Headings, Inline, Blocks and Alignment.
- **Save**: Save a draft of your response to return to later.
• **Attach a file:** Choose to attach a file, you can either drag and drop the file onto the ticket reply or choose the option to navigate to the ticket from your desktop

• **Status:** When replying change the status of the ticket.

• **Assign to:** Choose to assign the ticket to you or to assign it to another agent.

• **Send message:** To the right of the send message option there is a drop down, this allows you to select what happens when you send the ticket, choose from:

  Send and back to folder. Send and stay on the page. Send and next active.

**Ticket Information and Options.**

Within the ticket/note/forward option there is an editor available.

• **Back Arrow:** This takes you back to Inbox you were last in.

• **Status:** See and change the status of the ticket.

• **Assigned:** Change who the ticket is assigned to or unassign the ticket.

• **Priority:** Change the priority of the ticket.

• **Time tracking:** Change the priority of the ticket

• **Tag:** Add a tag to the ticket.

• **Manual Trigger:** Tickets that meet the criteria for the trigger will have actions run against them.

• **Settings:**
Add task: Choose to add a task within Teamwork Projects, the task will be linked directly to the ticket, if the ticket status is marked as on hold once the task is completed the ticket will be updated to be active.

Merge Tickets: If there are multiple tickets from the same emails address you can merge those tickets from this section.

Delete: If you delete a ticket you will be asked to confirm the deletion, please note that at this time this is final and cannot be retrieved so please be careful when deleting.

View shortcuts: Choose to view the shortcuts that are available.

Thread view

**Messages** Shows the thread of messages between you and the customer, this will show updates like the content of the messages sent and received, notes, updates on the ticket like being moved to another inbox, agent change, logged time, any triggers added, as well as status changes.

**Attachments** Shows all attachments associated with the ticket and allows you to view attachments, view attachment details and download the attachments.
Tasks Shows all tasks associated with the ticket and allows you to add new tasks, the task will be linked directly to the ticket, if the ticket status is marked as on hold once the task is completed the ticket will be updated to an active status. If there are no tasks on the ticket when selecting 'Add Task' you will be prompted to create a new task. (You can always press T whilst in the body of a ticket to attach a task to the ticket as a shortcut).

You can attach an existing task or create a new one.
When you attach a ticket and it is active, the task will look like the image below, showing you the person it is assigned to, name and date of the task, as well as the project and the Task list that it is on.

When completed the task will have a strikethrough through the title as well as a green check.

When a task is completed in Teamwork Projects and you have the associated ticket on-hold status in Teamwork Desk then the ticket gets assigned to the active status.

**View ticket history:** View the customer’s email history, see any previous tickets the customer has submitted.
Message Forwarding Icons

- **Quote Message**: Quote the message in your response.

- **Permalink**: This creates a link to this exact message in the thread that you can then paste elsewhere.

- **Forward**: Forward the message to a 3rd party

- **Edit message**: This opens an edit screen where you can edit the message either you have sent or that has been sent by the customer

- **Create New Ticket**: This option will only appear if there is multiple messages in the thread, in case you need to create a new ticket from one of replies.

- **Show original**:
  - **Preview**: Preview how the ticket looks in its original formatting
  - **Headers**: View the headers for the ticket.

- **Delete thread**: This option will only appear if there is a thread to delete (more than the initial query). You will be prompted to confirm the deletion but again this is permanent so please be careful with this.
Right hand panel

There is a series of collapsible windows that you can use to give you more information on the current ticket or customise it more. The system will remember your settings from ticket to ticket so if you expand one section it will remain expanded from ticket to ticket until you contract it again.

Customer Info

This will display the customer information that is on the system. You can see all their information or make changes:

- **Edit customer:** Choose to edit the customer details - this will take you out of the ticket to the Customer section of Desk so please save any draft you are writing before using this.

- **Change customer:** Choose to change the customer, this will not affect the ticket.

- **View ticket history:** View the customer’s email history with you in a popup.

- **Last ‘X’ tickets:** This will show you the last X amount of tickets that the customer sent in and you can click on anyone to open it in a side window, it will limit to the last 25 sent in, but you can always use the search functionality to check for more or View ticket history in the Customer info. This will only show up if there has been any previous contact from the email address.
Ticket Options

- **Inbox**: Change the inbox that the ticket is in
- **Type**: Change the type of ticket
- **Priority**: Change the priority of the ticket
- **Source**: Change the source of the ticket

Making any of these changes will be reflected in the ticket itself as an update.

Followers

Add yourself or others as a follower to the ticket, once added as a follower you will get email notifications about this ticket. This will also be reflected in the ticket as an update.

Time Tracking

This feature is only available on the Pro-Plan.

- **View logged time**: View the time spent on the ticket. This will be broken down by response and who logged the time, as well as giving a total.
- **Billable**: Select the pencil icon to log time to Teamwork Projects.
Chapter 3 - Help Docs

Help docs within Teamwork Desk are the perfect tool to help your client’s find the answers they need at any time.

You can navigate to this by selecting the ‘Help docs’ option from the top navigation bar on your site. Once in the Help docs section the grey panel to the right of this menu will list all your Help docs sites.

In the left panel click on a site name to show an expanded list of the categories in your Help Doc site. At the top of the list is an “All Articles” button. Click this to see all articles on this site irrespective of what category they are in. Click on a category name to see just the articles in that category.

Within the left sidebar you will be presented with a list of site names. When you hover over the site name a setting cog will appear. Once selected you will be presented with the ‘General Settings’, ‘Appearance’, ‘Categories’, ‘Comments’ and ‘Article’ settings.
Creating a New Help Doc Site

To create a new Help docs site simply hit the ‘+ New Site’ icon at the bottom of the left sidebar. Once selected a pop-up will appear asking you to enter details such as:

- Site name
- Subdomain
- Description

Creating Your First Help Doc Article.

Click into your Teamwork Desk site and click on the ‘Article’ settings option, under the site name. Select the New Article button in the upper right corner.
You will see the following fields and options:

- **Article title**: This will be the title of your article.

- **Slug**: A Slug is the part of the URL which identifies a page using human readable keywords. It is usually the end part of the URL.

- **Edit article**: This tab is where you will write and edit your article's content.

- **Related articles**: You will see a list of your past article's here. Select any articles you think relate to the current article you are writing and save. There is also a drop-down menu to select different categories.

- **Keywords**: Keywords allow clients to find this document based on the keywords you add to it. For example, if you find that clients are searching “gnatt” instead of “Gantt” frequently, you can add a keyword called “Gantt” to any docs we think are relevant to Gantt Charts and they will come up for users who are searching the incorrect spelling.

- **Save and publish**: Save and go live.

- **Save**: This will save what you have written but the article will not be published yet.

**Example article and edit components**

Categories allow you to organize all your support Docs in easy to find locations. Individual Categories may be named whatever you want.

Categories are listed on the main panel with the number of articles in each category displayed to the far right of the category. Click on the drag icon to the left of the category name to rearrange its ordering.

- **Article title**: This will be the title of your article.
**Slug:** A Slug is the part of the URL which identifies a page using human readable keywords. It is usually the end part of the URL.

**Edit article:** This tab is where you will write and edit your article’s content.

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### Formatting Options

Teamwork desk help docs has multiple formatting options including Out / In Dents, Bold Italic, Ordered and Unordered Lists and much more.

#### Images

Insert images into your docs so your users know exactly what you’re referencing. To add an image click You can then either choose a file or drag and drop a file right into the Insert image window.

Resize Images:

You can resize any image that you upload by clicking on it and resize it by dragging the resize icon at the bottom of the image.

#### Videos

Having video examples is incredibly helpful and you can embed them directly into help docs articles. Select the video icon and paste the link to your video.

#### Files

Maybe you want to offer your users an opportunity to download a file. You can insert any file into your doc by clicking the file icon. You can then either choose a file or drag and drop a file right into the Insert File window.

#### Links

To insert a link, click the link icon.
You can search for an existing article in your help docs site from here and the URL and title of that article will automatically be added. The article title will be prefilled in the Text field, and you can replace it if you prefer. If you already have a URL that you’d like to add manually, you can leave the Search field empty, paste the URL directly into the Link field and add the link text to the Text field, then click on the Insert Link button to add it to the article.

**Related articles**

If a user is reading one article, say on passwords, then they might also want to read about security. This is where the related articles feature come in.

From the dropdown, select the articles that you want to relate to the current article, and click save.
Keywords

Keywords allow clients to find this document based on the keywords you add to it. For example, if we find that clients are searching “gnatt” instead of “Gantt” frequently, we can add a keyword called “gnatt” to any docs we think are relevant to Gantt Charts and they will come up for users who are searching the incorrect spelling.

Revisions

Revisions allow you to see each change that has been made to a doc, from the very first change right up to the most recent.

Save and publish

If you look to the right hand of the page you will see the following options:
- **Status:** This field lets you know whether you have selected Unpublished, Published or Draft.

- **Display order (relevance):** The higher the number here the higher up the list the article will be in All Articles on your live website.

- **Preview:** This is to preview your published document.

- **Advanced:** Advanced allows you to place an old link which will direct any older articles to this new page.

- **Delete:** Does as you would expect.

- **Comments:** To enable comments you must integrate Disqus. Instructions on how to set Disqus up here.

- **Categories:** Choose from one in the list or create a new category.

- **Text editor:** Choose from HTML or Markdown.
Chapter 4 - Customers

In the customers section you can view all the customers who have contacted you or you have set up on Teamwork Desk.

It will show the number of customers you have, and it will show customer names in alphabetical order:

- **Customer**: The Name of the customer, you can also click on this to pull up the customer profile.
- **Email address**
- **Tickets sent**: the amount of tickets that person has been involved with in Teamwork Desk - does not include being CC'd or Bcc'd in a ticket.
- **Last ticket**: this is the date of the last ticket sent in by the customer.
- **Inboxes**: on the right-hand panel you can also restrict or expand your searches to include other or all mailboxes, depending on what you have selected.

Customer Profile - Edit

By clicking on the customer name or email address you will have the option to edit individual customer details.
There are a variety of entry options:

- First Name *
- Last Name *
- Company
- Job Title
- Email *
- Phone
- Mobile
- Twitter
- Facebook
- LinkedIn
- Address
- Notes
- Photo- you can add/ edit a photo of the customer here.

The fields marked with an asterisk are mandatory, they are also automatically filled out when the customer makes contact the Teamwork desk or when you create the customer.

Don't forget to click on save profile if any changes have been made.
Customer profile - History

In the second tab of the customer profile you can view the History of the customer.

Here you can see a variety of information, you can select what information you wish to have displayed using the filter setting in the upper right corner of the view.

- **Assigned**: which agent within the company the ticket was assigned to.
- **ID**: The ticket ID assigned to the ticket
- **The number of tickets**: the amount of contacts in total made by the customer.
- **Created**: The date the ticket was created.
- **Updated**: The date the ticket was updated.
- **Status**: The current status of the ticket (active, waiting on customer, closed).
- **Priority**: If a priority was assigned to the ticket then it will show here
- **Spam Score**: The spam score associated with the ticket
- **How the customer contacted you**: was it chat or e-mail, indicated by the icon under- the tickets.
- **A brief overview of the ticket**: you can click into this and you can view the entire ticket.
- **Type**: The type of ticket
Source: Where the ticket came from.

Create New Customer

By clicking on the ‘Create new customer‘ button this will allow you to create a new customer.

All three fields are mandatory and must be filled in before clicking on Add Customer. This will then save the customer to the database.

Upload Customers

By clicking on the ‘Upload Customers‘ button near the top right, you can upload a CSV file of your existing customers. If required we supply a sample CSV file that you can use, please note that the format needs to be followed exactly.
Customer Search

You can use the search function to find customers, tickets or help documents.

The search results are shown categorised into ‘Tickets’, ‘Customers’ and ‘Help docs’.
Chapter 5 - Reports

The reports section can be located by clicking on the reports button on the left-hand panel. This option is only available to Pro plan users.

There are several areas within reports which can be explored for a deeper look into the reporting for Desk.

Dates

On each page you select within reports, two options will always show:

Date Range for the reports, you can edit it by clicking the top right drop down menu, here you will be given the option to change the start and
end date, you can also choose from a set time period as well if you so wish, by default it is set to the last 7 days.

Filters

You can also click on the filters tab to apply the filters to each report, by:

- Inbox*
- Tags*
- Agent*
- Priority - Low, medium or high.
- Status - What status the ticket is in i.e. Active, solved, spam.
- Source - email, phone, docs etc
- Type - the nature of the ticket, Problem, Question, Marketing.
- These have a search function due to the high number of entries that can be in here.
Overview

Here you can see quick overviews for the following reports, all in one page.

Customer Happiness

This graphic will give you a snapshot of the performance of your agents. Adjust the filter options in the upper right-hand corner to display specific data views.

My Performance

A comparison between users. This displays the top five agents, it will be based on the filters set in the upper right. If there are no filters set, it will show the top performers.
Volume and First Response Times

The average response time on all your tickets from all inboxes.

Tickets by channels

This shows where your tickets have come from, based on the email addresses you have set you can choose to see the volume of tickets coming from that area. For example, if you use Teamwork Desk Docs section you can see all contacts coming from that section.
**Tickets by status**

View the status of the tickets, see how many tickets are ‘active’, ‘closed’, ‘solved’, or ‘waiting on customer’.

In each of these panels you have the option to click on ‘more insights’. More insights will bring you to the associated tab for the report.

**Activity**

In the activity section you can see a timeline of the most recent activity on tickets. You will be able to see if a ticket was assigned, resolved, replied to, put on hold etc.

Each action provides the following information.

- Who took the action.
- The ticket number and name.
- Time of activity (hover over this for exact time information).
The icons to the right of each action relates to the type of action that was taken:

- 🔄 Indicates a change in status
- 🔥 Wrote a reply
- 👤 Assigned the ticket to this person
- 📝 Wrote a note.
- 🌐 Viewed the ticket

**Tickets**

There are seven fields being reported within the tickets section.

**Tickets Activity**

View the status of the tickets, see how many tickets are ‘active’, ‘closed’, ‘solved’, or ‘waiting on customer’. This is based on the sort options selected in the upper right.

There are also stats for:

- Total tickets.
- New tickets.
- Tickets per day.
- Customers.
Busiest Time of Day

Get an indication as to the busiest times of the day, calculated based on the time tickets arrive to your Teamwork Desk account.

Popular Tags

Tags that have been added to tickets, this will give an indication as to the most widely used tags. By selecting the name of the tag, you will be brought to a view showing all those tickets.
Tags Timeseries

A graphical display of the most popular tags displayed based on the sorting options selected.

Resolution Time

The amount of time between the ticket arriving and the status being set to solved or closed.

<table>
<thead>
<tr>
<th>Time</th>
<th>Tickets</th>
<th>Versus Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-15 min</td>
<td>1,475</td>
<td>0%</td>
</tr>
<tr>
<td>15-30 min</td>
<td>383</td>
<td>0%</td>
</tr>
<tr>
<td>30-60 min</td>
<td>331</td>
<td>0%</td>
</tr>
<tr>
<td>1-3 hours</td>
<td>419</td>
<td>0%</td>
</tr>
<tr>
<td>3-6 hours</td>
<td>287</td>
<td>0%</td>
</tr>
<tr>
<td>6-12 hours</td>
<td>167</td>
<td>0%</td>
</tr>
<tr>
<td>12-24 hours</td>
<td>514</td>
<td>0%</td>
</tr>
<tr>
<td>1-2 days</td>
<td>272</td>
<td>0%</td>
</tr>
<tr>
<td>2+ days</td>
<td>1,502</td>
<td>0%</td>
</tr>
</tbody>
</table>
First Response Time

The amount of time between the ticket arriving in Desk and the first message being sent to the customer (note: we do not currently have the option to base this on a working day).

![First Response Time Graph]

<table>
<thead>
<tr>
<th>Time</th>
<th>Tickets</th>
<th>Versus Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-15 min</td>
<td>1,925</td>
<td>0%</td>
</tr>
<tr>
<td>15-30 min</td>
<td>745</td>
<td>0%</td>
</tr>
<tr>
<td>30-60 min</td>
<td>354</td>
<td>0%</td>
</tr>
<tr>
<td>1-3 hour</td>
<td>265</td>
<td>0%</td>
</tr>
<tr>
<td>3-4 hours</td>
<td>148</td>
<td>0%</td>
</tr>
<tr>
<td>6-12 hours</td>
<td>128</td>
<td>0%</td>
</tr>
<tr>
<td>12-24 hours</td>
<td>103</td>
<td>0%</td>
</tr>
<tr>
<td>1-2 days</td>
<td>113</td>
<td>0%</td>
</tr>
<tr>
<td>2+ days</td>
<td>330</td>
<td>0%</td>
</tr>
</tbody>
</table>

Most Expensive Tickets

This is to give you a guide as to the most time and effort that has been spent on tickets. It is calculated based on the number of responses and the number of agents involved. Here, you can toggle between tickets and customers.
Team

Within ‘Team’ there are four areas of information available.

Customers Helped
A graphical representation detailing all the tickets answered by your team. Also available under ‘Your team’. There are also stats for:

- Number of Customers helped
- Average Resolution time
- Avg happiness
- Tickets solved

Team Average Threads
This shows a line graph for the amount of tread per ticket for each agent (each agent can be toggled on / off).
Your Team
A full list of all agents on your Teamwork Desk account. This details over the date range selected the replies, tickets solved, customers helped, handle time, and the happiness rating.

Time
There are three fields being reported within the ‘Team’ section.

Time Log Activity
This will show a graph of time logged. There are also stats for:
- Total logged time.
- Total tickets.
- Average time logged per day.
- Total agents.

Most Expensive Tickets
This is to give you a guide as to the most time and effort that has been spent on tickets. It is calculated based on the number of responses and the number of agents involved. Here, you can toggle between tickets and customers.

- Ticket number
- Customers name.
- Time spent on all the contacts.
- Number of agents involved with resolving the ticket.
Most Expensive Customer

Calculation is made using the same information as most expensive tickets.

- Customers name.
- Time spent on all the contacts.
- Number of agents involved with resolving the ticket.

Help Docs

This is a series of five reports showing you various search results in your Help docs and information on how to improve them.

Help Docs Usage Insights

Designed to give you an insight into the usage of your Help docs. Here you can see the unique visits, Articles viewed per visit, emails sent from the Docs, new visitors, mobile users, and average length of time people spent on the page.

<table>
<thead>
<tr>
<th>Help Docs Usage Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Chart Image]</td>
</tr>
</tbody>
</table>

Top Articles

The most viewed articles. There is an option to expand the chart list by clicking on ‘Show More’.

- Name of article
- View count - this can be toggled to show smallest to highest and vice versa
- Requests on the page
- Percentage difference in traffic to that page from the previous time period.

<table>
<thead>
<tr>
<th>Top Articles</th>
<th>Views</th>
<th>Support Requests</th>
<th>Versus Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting started guide</td>
<td>1343</td>
<td>5</td>
<td>3%</td>
</tr>
<tr>
<td>Users &amp; Collaborators (License Types)</td>
<td>378</td>
<td>0</td>
<td>3%</td>
</tr>
<tr>
<td>Creating task list templates</td>
<td>374</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Adding tasks via email</td>
<td>507</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>Task Incidents</td>
<td>555</td>
<td>0</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Top Categories**

The top categories people have selected when viewing the Help docs. There is an option to expand the chart list by clicking on 'Show More'.

- Name of the category
- Articles in that category - this show the number of articles in the category
- Unique number of views - this can be toggled to show smallest to highest and vice versa
- Percentage difference in traffic to that category from the previous time period.

<table>
<thead>
<tr>
<th>Category</th>
<th>Articles</th>
<th>Unique views</th>
<th>Versus Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasks</td>
<td>60</td>
<td>6,585</td>
<td>0%</td>
</tr>
<tr>
<td>Just signed up</td>
<td>5</td>
<td>4,670</td>
<td>0%</td>
</tr>
<tr>
<td>Features and tips to save you time</td>
<td>34</td>
<td>4,294</td>
<td>0%</td>
</tr>
<tr>
<td>Glossary</td>
<td>22</td>
<td>3,452</td>
<td>0%</td>
</tr>
<tr>
<td>Using Teamwork Projects</td>
<td>58</td>
<td>2,785</td>
<td>0%</td>
</tr>
</tbody>
</table>

SHOW MORE •
Failed Searches

Searches that users have attempted and not returned an answer, gives a great insight to improvements that need to be made. There is an option to expand the chart list by clicking on ‘Show More’.

- Name of the search.
- Site it was done on.
- Count (How many times this has happened) - this can be toggled to show smallest to highest and vice versa.
- Percentage difference in traffic to that search from the previous time period.

<table>
<thead>
<tr>
<th>Failed Searches</th>
<th>Site</th>
<th>Count</th>
<th>Versus Previous</th>
</tr>
</thead>
<tbody>
<tr>
<td>todaytasks</td>
<td>Teamwork P... 🌐</td>
<td>145</td>
<td>0%</td>
</tr>
<tr>
<td>create?sudo=1</td>
<td>Teamwork P... 🌐</td>
<td>101</td>
<td>0%</td>
</tr>
<tr>
<td>upcomingtasks</td>
<td>Teamwork P... 🌐</td>
<td>89</td>
<td>0%</td>
</tr>
<tr>
<td>task-templates</td>
<td>Teamwork P... 🌐</td>
<td>64</td>
<td>0%</td>
</tr>
</tbody>
</table>

Top searches

The areas that have been searched the most within your Docs account. There is an option to expand the chart list by clicking on ‘Show More’.

- Name of the search.
- Site the search was done on.
- Count (The amount of times this was looked up) - this can be toggled to show smallest to highest and visa versa.
- Percentage difference in traffic to that search from the previous time period.
Happiness

Here you can find the happiness rating reports. The happiness rating has three different statuses:

- Great
- Ok
- Bad

There are two fields being reported in here.

Customer Happiness

A graphical representation of how happy your customers are. Displaying the total percentage happiness based on ratings received.

Recent Ratings

Displays a list of all the ratings received and a link back to the ticket itself. A great way for an agent or an admin to view the ticket and identify whether the ticket rating was justified. Toggle here to view All, Great, OK, or Bad. The percentage is calculated as the sum of the total gotten score / possible score.
Clicking on any of the following fields marked with an * will open a quick view of the ticket. - to return to your happiness page and quit quick view you can click on the “X” button on the top right of Quick view or click away from the quick view.

The user filter marked with ** directs you to the Team report tab to give a further breakdown for the user as follows:

- **Customer:** clicking on a customer's name will automatically filter that customer's email address and all ratings from the customer in the time period.

- **Subject of Ticket**.

- **Ticket number**.

- **User**: clicking on a user will filter all ratings completed for the user for the time period.

- **Date**.

- **Rating**: clicking on a user will filter all ratings completed for the user for the time period.

- **Comment**.

**Remove a Rating**

An administrator can remove a rating by selecting the ticket and the drop down to the upper right of the happiness rating. From here they can select the option to delete, you will then be prompted to enter a note detailing why you are deleting the rating.
Chapter 6 - Search, Notifications, Product Switch, My Avatar

Within Teamwork desk there are options located on the top right-hand corner of the page. These options are available from any page you are viewing within Desk, and can be used to access the search functionality, notifications the product switcher, your avatar.

Search

You can find the search ability on the right-hand corner of the navigation bar. From here you can search for tickets, customers or help docs.

You can apply a series of filters or restrict the search to a combination of your choosing and apply a filter to search by time for all three areas.
Notifications

You can find the Notification bell on the right-hand corner of the navigation bar. This area will provide you with a notification history. Notifications can be easily searched and filtered. Users can also mark all notifications as ‘Read’ from here. You can also individual notifications as read from this area.

Product Switcher

You can find the Product Switcher in this area also. From here you can easily access Teamwork Projects and Teamwork Chat.

Your User Avatar

Available from the top right corner of the navigation bar, selecting this icon will present you with a drop down menu contain; View Profile, Help & Support, Webinar Signup, What’s New, Settings, Log Out.
View Profile

You can access the profile options by selecting 'View Profile', from the drop-down list that is presented when you select your user avatar.

When in the View Profile view you will have access to a sidebar on the left-hand side of the screen. This area will present you with the options to update information relation to Your Profile, Permissions, Notifications and API Keys.

Profile
Within your profile you can update any personal details you have on the account.

Permissions
You can access the permissions options from the left-hand side bar when in the View Profile area.

In the permissions tab, which is accessible by admins only, you will see what inboxes you have access to, and you can turn them on and off as well. As an admin you have access to all inboxes. Selecting inboxes here, will add them to your default list.
To do this simply click on the inbox itself and there will be a small green outline and a tick symbol on the inbox. If you do not have the inbox in your default list, then it will appear greyed out.

Notifications

You can access the notification options from the left-hand side bar when in the View Profile area.

In the notifications tab you can edit what notifications you receive for each inbox you are a part of. You can set them on a general level for all inboxes or you can set the on a per inbox level, simply tick the ‘Customize notifications for each inbox’ to allow this setting.

You are given several options to toggle on or off to receive emails:
- Turn on all.
- There is a new ticket.
- A ticket is assigned to me.
- A ticket is assigned to someone else.
- A happiness rating is added.
- I am added as a follower to a ticket.
- I am removed as a follower to a ticket.
- Someone else follows one of my tickets.
- Someone else unfollows one of my tickets.
- Someone else follows a ticket owned by someone else.
- Someone else unfollows a ticket owned by someone else.
- A customer replies to:
  - A new ticket.
  - One of my tickets.
    - A ticket owned by someone else.

Another user replies or adds a note.
- A new ticket.
- One of my tickets.
- A ticket owned by someone else.

**Note:** As an Admin you can choose not to show all inboxes in your default list. If you’re assigned a ticket in an inbox you don’t follow, you’ll still receive a notification. This is a safety feature designed to keep you from missing important tickets.
API Keys

You can access the API key options from the left-hand side bar when in the View Profile area.

An application programming interface key (API key) is a code passed in by computer programs calling an API (application programming interface) to identify the calling program, its developer, or its user to the web site.

When you create a new API key you get given the option to give it a name, the system will default to calling it Key 0, Key 1 etc. but this can be manually changed. You are then given the option to Save, Regenerate or Revoke the API Key.

You can also view all previously created keys as well. You can see when it was created, as well as the editing options to Save, Regenerate or Revoke the API Key.

Help and Support

You can access the ‘Help & support’ options by clicking on the avatar at the top right-hand corner of the screen. From here a drop-down list will be presented, from which you can select Help & Support.

Selecting this will bring you to our external support pages.
**Webinar Signup**

You can access the ‘Webinar Signup’ options by clicking on the avatar at the top right-hand corner of the screen. From here a drop-down list will be presented, from which you can select ‘Webinar Signup’. Selecting this option will bring you directly to a signup page for an ‘Introduction to Teamwork Desk’ tutorial session.

**What’s New?**

You can access the ‘What’s New?’ options by clicking on the avatar at the top right-hand corner of the screen. From here a drop-down list will be presented, from which you can select ‘What’s New?’. Here you can find any updates to Desk and stay up to date with any new or enhanced features.

**Settings**

You can access the ‘Settings’ options by selecting your avatar at the top right-hand corner of the screen. From here a drop-down list will be presented, from which you can select ‘Settings’.
Company Settings

From the left sidebar you will be presented with a list of options under the company tab. The first option on this list is ‘Edit Company’;

**Edit Company:**
The edit company option is the central area where you can control the following options:

- **Site name:** Choose what name you wish to see on the customer portal if no company logo is added.
- **Site address:** the address that you use to login to the site, you can choose to change this by selecting the change option, here you can also choose to add a custom domain.
- **User permissions:** These permissions affect all agents on the site:
  - **Agents are allowed to delete notes/threads:** toggle to choose whether your agents have the option to delete notes/threads on tickets.
  - **Agents are allowed to edit notes/threads:** toggle to choose whether your agents have the option to edit notes/threads on tickets.
  - **Agents are allowed to manage canned responses:** toggle to choose whether your agents are allowed to manage canned responses. If this is not enabled, agents will not be able to save responses as canned responses.
• **Agents are allowed to manage tags**: toggle to choose whether your agents can create new tags to add to items. If this is not enabled, then they will only be able to add existing tags to tickets.

• **Allow “On-hold” status**: toggle to choose whether your agents have the option to mark a ticket as on hold, if this is not enabled there will be no on-hold status available.

• **Auto Close Old Tickets**: toggle to choose whether if tickets that have been marked as “waiting on customer” will auto close after 72 hours, if this is not enabled tickets will continue to keep the status “waiting on customer” until it is manually changed.

• **Default Customer Avatar**: select the default avatar shown for customers, you can choose from animal, person or their initials.

• **Company Time zone**: select the time zone for your site.

**Message Settings**

• **Trust Customer Images**: toggle to choose if images from untrusted customers will be disabled.

• **Quote Previous Message**: toggle to choose if previous message will be quoted in your response.

• **Open Tracking**: toggle to choose whether to have open tracking enabled on replies to customers. If it is enabled there is a timestamp showing when the reply was viewed by the customer, under the reply content area.

• **Include Ticket ID**: toggle to choose whether to include ticket ID in email subject line.

• **Show Teamwork Branding**: toggle to choose whether to have Teamwork Desk branding removed. This removes the text “Powered by Teamwork“ on replies sent to customers, and references to Teamwork Desk
in the embeddable contact form. (Please note this option is only available in the Pro subscription)

- **Detect Manual Forwards:** toggle to choose whether Desk should try to detect the original sender from emails manually forwarded by Agents.

### Default Settings

- **Time Format:** choose the time format, select between 12 or 24-hour format.
- **Text Editor:** HTML or Markdown

When any of these settings have been updated, please be sure to save them using the button at the bottom of the screen. If you do not save the settings, they will not be applied.

### Spam control

Here you will find the options available to help control your spam.

Teamwork desk makes use of a spam detection and filtering server, but on occasion you may want to set your own rules to either ensure that mail from certain senders is always or never marked as spam. Whitelisting enables you to ensure tickets fitting certain criteria will be added to the system bypassing spam control. Blacklisting blocks tickets based on specific criteria.
The criteria that you can use for both whitelists and blacklists are:

- Specific email address (for example, spammers@spam.com)
- Email domain (spam.com)
- Subject (Want to buy some spam?)
- IP Address of original sender (127.0.0.1)
- Match all senders, ensuring that no email is ever automatically marked as spam (*)

Ensure you apply updates by using ‘Save Settings’, if you do not save then the changes will not be applied.

**Custom Fields**

Administrators can create custom fields to display on tickets and/or contact forms. These fields prompt end users to submit additional details such as a serial number or installation ID, as well as reminding agents to collect required data before closing a ticket.
To get started click “Add Field”. You will now have the option to choose a field type.

Users can add up to six different types of custom fields by clicking “Add Field”;

- **Text field**
  Agents (and optionally customers) can enter single line text
- **Multiline Text field**
  Agents (and optionally customers) can enter multiple lines of text
- **Dropdown**
  Allow agents (and optionally customers) to choose exactly 1 option from your pre-defined list
- **Numbers**
  Accept numeric input from agents (and optionally customers)
- **Checkbox**
  Allow agents (and optionally customers) to choose 0 or more options from your pre-defined list
- **Date**
  Allow agents (and optionally customers) to select a date from a date picker

More information on setting up the custom field can be found on our Help Docs.
**Ticket Sources**

Choose to set your own ticket sources.

The ticket sources will in turn show when creating a ticket, or when a ticket has arrived it will be listed in the ‘Ticket Options’ area of the ticket details screen. There are 4 standard sources that cannot be removed, these are Docs, Email, Email (manual) and Phone.

**Ticket Types**

Choose to specify your own ticket types, ticket types can be used when creating a new ticket manually or can be edited in the ticket details screen in the ‘Ticket Options’ area.

You can choose to create your own by adding one to the text box and clicking ‘Add’. There are 4 standard types that cannot be removed, these are Problem, Question, Request and Unspecified.
**Ticket Statuses**

The ticket statuses that are available allow you to choose the status of the tickets.

You can choose from the defaults or choose to add your own. The standard options cannot be deleted, these are Active, Waiting on Customer, On-hold, Solved (when selecting this option, a happiness rating can be sent to your customer), Closed or Spam.

You can also choose to create your own by adding a name for your new status to the text field and then selecting the ‘Add’ option.

**Import data**

If you are importing from other help desk options you can choose to import from the settings - company - Import data, at this time the options available are to import from Zendesk or Freshdesk.

The tickets imported will all be marked as closed, as available for reference.

**Import history**

Here you can see the details of previous imports.

Details available are the ID, type of ticket, the status and the message.
Export Data

Here you can select to export data from your site. Your options here will include to export information relation to; all, customers, docs, ticket statuses, ticket types, tickets and users. This information will be exported to a .json file.

Webhooks

Webhooks allow external services to be notified when certain events happen within your helpdesk. You can configure this to send notifications of new and updated tickets, customer creations, and other information on the site.

Time Tracking

Once you have enabled time tracking in the Apps area within Settings, you will be able see options relating to time tracking on tickets

You can customise the tracking for each inbox or choose settings to be applied to all inboxes.
User Settings

Only administrators can access the ‘Users’ area from the settings menu. This is available from the lower navigation bar, when in the Settings view.

Inviting or Creating Users

In the top right, select ‘Invite users’, then you can choose to add the details for each new user, or select from existing people on your Teamwork Projects site. Choose whether they should be an agent or administrator and if they are a Part-time agent.

Select the inboxes you wish to give them access to and click save.
An email invitation will be sent to the users you've added, once they click the link in that email they will be prompted to choose a password and log into the site.

Views

When viewing users, choose either a list or a grid format. This is controlled from the icons to the left of the ‘Invite Users’ option.

Different Types of Users

Admin
An admin user has full access to everything on your Teamwork Desk site. They can access the settings section and manage users, they will also see all the inboxes that have been created even if they are not added to those inboxes.

Agent
An agent can access the inboxes they have been added to, they can see tickets that are unassigned, assigned to them, assigned to others in those inboxes.

Part-time agent
A part time agent can log in, view tickets within inboxes that they have access to, and they can also respond to tickets however they are limited to replying to 10 tickets each month.
Editing a User

To edit a user, you must be in the Settings > Users area, here you can select the user’s name and you edit the person’s profile and permissions.

- **Profile:**
  - **First name:** The user’s first name.
  - **Last name:** The user’s surname.
  - **Email:** The user’s primary email.
  - **Role:** Select whether the person is an Admin, Agent or Part-time agent.
  - **Part Time:** Toggle in or off whether an agent is a Part Time user. Part time agents can send 10 replies per month. You will not be charged for any part time agents on the site.
  - **Alternative emails:** you can add two alternate emails for the user, the reason for these is to allow you to signature forward emails to the site, when forwarding from one of these alternate emails the system will recognize those email addresses and show the mail as coming from the original person who sent the mail.
  - **Job Title:** Enter the job title of the user.
  - **Office phone:** Enter the user’s office number.
  - **Cell phone:** Enter the user’s Cell phone number.
  - **Home phone:** Enter the user’s Home phone number.
  - **Time zone:** Choose the time format for the user, the options here are 12hr, 24hr.
  - **Photo:** Choose to add a profile picture for the user.
  - **Time Format:** Choose to display time using the 12 hour or 24 hour format.
  - **Send web notifications:** Toggle to send notifications to your browser, these notifications will show updates on the tickets.
  - **Text Editor:** Choose preferred text editor for user (HTML or Markdown).
  - **Save profile:** After any change has been made to the user’s profile ensure that you select the save profile option, if you do not select these changes will not be saved.
- **Reset password**: You cannot change the user’s password manually, however this generates an email with a link they can use to update their profile details.
- **Delete user**: select this option if you wish to delete the user, the tickets associated with this user will not be deleted.

**Permissions**

The permissions section is the area where you can select what inboxes the user has the permission to see, it’s important to remember that if a user is an admin they will by default have permission to see all inboxes.

To add an inbox for that user, select the checkbox in the lower left of the inbox you wish to add them to.

**Customer Portal Settings**

The customer portal is available from the lower navigation bar, when in the Settings view. You can choose to enable or disable as necessary.
The customer portal will allow your clients to login and see the tickets that they have sent. They can see all the tickets and the replies to those tickets, the agents involved and the status of the tickets.

**General Settings**

- **Enabled**: Choose whether the customer portal is enabled or disabled. If enabled your clients will be able to login to the customer portal and see their tickets.

- **Language**: By default, the language of the Customer portal will be set by the user’s browser. You can however lock it to another language if you so wish, just use the drop-down menu to select this.

- **Custom domain**: Choose to add a custom domain to the customer portal. If you do not have a custom domain, the URL for your customer portal will be visible underneath the custom domain option.

- **Customer permissions**:
  - **View/Edit priority**: Choose to allow your clients to update the priority of a ticket. When enabled customers can specify the ticket priority (high, medium, low) of their tickets.
  - **View/Edit type**: Choose to allow your clients to update the type of a ticket, when enabled customers can specify the ticket type (questions, problem, request, etc.)
  - **View/Edit tags**: When enabled clients will be able to see what you have tagged the ticket with.
  - **See agent**: Choose whether the client can see who the ticket is assigned to, they will always see the person who has already responded to the ticket.
• **Close tickets:** Choose whether to allow your customers to close tickets if they deem the ticket to be closed.

• **Help docs:** Include your help doc sites and articles to allow customers to find answers to their questions quickly and easily before opening new tickets. Select which sites you would like to include.

• **Inboxes:** Choose which inboxes you would like to allow your clients submit tickets to. There must be at least one inbox selected. Here you can also set an inbox alias, this allows you to customise the form field that will be displayed when choosing an inbox.

• **Notifications:** Choose when a customer submits their first ticket should we send them an email with information on logging into their account? Here you can add an email notification subject and an email notification body.

• **Save changes:** With any changes made please ensure to save the changes, any changes made and not saved will not hold.
Appearance

This area allows you to customise the portal, you can choose to update the style and colours. You can also upload your logo and stylesheet for the customer portal here as well.

Inbox settings

The inbox settings allow you to modify various areas relating to your inboxes. Upon selecting this option, you will be presented with an option to choose which inbox you wish to edit.

Edit Inbox

You can edit various inbox information within the edit inbox section.
**General**

The options available can be found below:

**Inbox name:** Create a new inbox name.

**Email address:** Address used to receive email to this inbox.

**Email language:** Select a language for the inbox.

**Inbox image:** Upload an image for the inbox.

**Public icon:** Choose the icon that the public will view.

**Aliases:** Choose to add a custom domain to the customer portal. If you do not have a custom domain, the URL for your customer portal will be visible underneath the custom domain option.

**Email ‘From’ name:** Use this to receive emails from alias email addresses added here.

**Default status:** Choose whether you want to see the agent name or mailbox name in from the ‘from’ field of the email.

**Spam Threshold:** Choose the spam threshold for the inbox. This can vary from strict, normal, relaxed and off.
**Auto Email Inclusion**

Any email addresses added as CC or BCC within auto email inclusion will be automatically added to agent replies sent from within Teamwork Desk (notes will not be sent).

**Happiness Rating**

You can enable happiness ratings on your tickets. If you enable this an email will be sent to your customer when a ticket is ‘solved’. You can save the automated happiness message from this area.

**Email Signature**

You can set an email signature that will be included with every email sent from this specific inbox.

The option to save changes or delete the inbox is also available.
Email Settings

We cannot send emails from Desk to your customers using your email address without your permission. If we did, it would have a high chance of either being marked as spam or our servers being blacklisted by the major email providers.

Without setting this up, your emails will go out with a message saying they are sent via teamworkdesk.com, from a different address. That address will be support=company@teamworkdesk.com (based on an inbox email address of the format support@company.com).

More information on setting up the screens below can be found on our help docs.

Incoming Email
Sending Email

Teamwork will send my email:

Send email with custom outgoing (SMTP) settings:
**Inbox Permissions**

This area will show which users have access to this inbox.

You have the option of viewing all, none or adding a new user.

If you choose to add a new user you can invite them to the inbox via email:
You can also add a new user through Teamwork Projects by choosing ‘Select from Teamwork Projects’ and adding from the list.

![Add users from Teamwork Projects](image)

**Auto Reply**

If this is enabled, the reply email you enter here will be sent as soon as an email is received to this inbox.

![Auto Reply](image)

**Canned Response**

You can create new canned responses here which you can quickly enter in your responses to customers. This is a great time saving option. To create a new canned response, click on the green ‘New canned response’ near the top right. This will give you an option to name the canned response and enter the required text.
Triggers

An automatic trigger allows for selected actions to automatically take place whenever a ticket is created or updated. When a ticket is created or updated, we will run any triggers whose conditions to run match the ticket. Note: each trigger will only run once on a ticket.

A manual trigger is one that you can be applied by an agent inside of the Desk user interface on one or more selected tickets. Tickets that meet the criteria for the trigger will have the actions run against them. Administrators can choose if a manual trigger will be available to agents.
Help Doc Settings

The Help docs are a great option to help your clients to find answers anytime. You can access your Help docs from the Help docs tab in the top navigation bar on your Desk site. You can directly access your Help docs site settings from the settings cog in the drop-down list of options presented when you select your avatar in the top right corner of the screen. From here you will be able to select the Help Doc tab, from the lower navigation bar.

Help Doc settings are broken down into five areas.

- General Settings.
- Appearance.
- Categories.
- Comments.
- Articles
General Settings

### BASICS

**Site name**: Teamwork Desk Support

**Published site**: 
- **Visit site**

**Show Social Icons**: 
- On

**Sub-domain**: teamworkdesk

**Custom Domain**: support.teamwork.com/desk

**Authentication Options**: None

**Default edit method**: HTML

- **Site Name**: is where you name your Help docs site.

- **Public site**: If this is turned on, then your site is live on the internet via the sub domain (or the custom domain you've selected)

- **Show Social Icons**: You can choose to show or hide social media icons. If you choose to show them then the reader can use these buttons to share your article through those social media channels.

- **Sub-domain**: This will be your URL for your docs site. It will always be yourdomain.helpdocs.com and you can change this 'yourdomain' to whatever you wish.

- **Custom Domain**: If you wish to use a custom domain, such as docs. yoursite.com this is where you enter that address. Please note that changing a CNAME is done through your domain provider. The process is easy enough if you have some DNS experience. Generally, the steps are:

  - Create the CName record.
• Simply create a CName record and point it to your Teamwork desk site (eg. docs.yourdomain.com). (You usually do this with the company you registered your domain name with eg.Godaddy.com)

• Verify the CName record is working.

• Once you have created the CName record and you have verified it is now pointing to your site, enter the custom domain into the above section.

**Authentication options**: You can choose to make the site public or private and add authentication options. The following authentication options are available:

• None (everyone can view your site. This is the default).

• Desk admins and agents (only those who can log in to your Teamwork Desk account can see the Help Docs).

• Global/Shared password (we encrypt the password using industry standard methods).

• To further enhance the security, any time you change the password to the Help docs all users are required to re-authenticate to continue browsing.

• IP Address Whitelist (only whitelisted IP addresses can view your site).

• IP Address Blacklist (everyone not in your blacklisted IP addresses can view your site).

In order to set up security for your Help docs site, click the Settings icon (the cog) on the lower left of the screen, then choose “Help docs”. Now select the site that you wish to modify the security settings on and select “General Settings” in the left-hand navigation. Once on the General Settings page you can set the security under “Authentication Options”.

• When using the IP Address Whitelist/Blacklist options an IP address range is inclusive of the “From Address” to the “To
Address” for example 127.0.0.1 -127.0.0.3 contains 3 IP addresses 127.0.0.1, 127.0.0.2 and 127.0.0.3. You can also specify a single IP address by omitting the “To Address”.

- **Default edit method**: Here you can select to have either HTML or Markdown as your default edit method.

### Site Information

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Page URL</td>
<td>A link to your main website’s home page.</td>
</tr>
<tr>
<td>Home Page URL Text</td>
<td>What the link should appear as</td>
</tr>
<tr>
<td>Site Description</td>
<td>Optional. Your internal description of the site.</td>
</tr>
<tr>
<td>Meta Description</td>
<td>Optional but highly recommended. This is the description of the site that Google will see if you publish your site.</td>
</tr>
<tr>
<td>Show on Home Page</td>
<td>Categories</td>
</tr>
<tr>
<td>Site Language</td>
<td>English</td>
</tr>
</tbody>
</table>

- **Home page URL**: Add a link to your website’s home page
- **Home page URL Text**: The text contained in your home page URL.
- **Site description**: A description of your site goes here
- **Meta description**: Search engine's love Meta descriptions, make sure you put yours in here
- **Show on home page**: Select what you want to show on your docs home page. Categories? Most Popular Articles? You decide.
**Site language:** Select the language for your site.

**Contact Form**

This is an optional form that allows your customers to submit queries directly from your Help docs site. Switch off or on and select which inbox the queries should be sent to.

**Appearance Settings**

You don't need to use the default look help docs. We have lots of appearance options, so you can customize your very own look. From logos, colors, templates, and even style sheets, there are lots of ways to put your own unique stamp on your brand-new Docs Site.

**BRANDING**

Upload logo

![Logo](teamworkdesk.png)

Remove logo

Upload logo

Will be resized to 300x300 pixels; JPEG, PNG, and GIF are accepted.

Upload favicon

Remove favicon

Upload favicon

Recommended size is 32x32 pixels; ICO and PNG are accepted.

Upload touch icon

Upload touch icon

Will be resized to 152x152 pixels; JPEG, PNG, and GIF are accepted.
To upload a Logo, favicon, or even a Touch icon, click the relevant upload button.

Browse to the file that you wish to upload and click upload

Logos will be resized to 300x80 and JPG, GIF and PNG formats are accepted. Favicons should be 32x32 and ICO and PNG formats are accepted. Touch Icons will be resized to 152x152 and JPG, GIF and PNG formats are accepted.

Colors

Customise the colors within your docs site from the Page Background, to the color of the Links, you can either enter the HEX code or select from an extensive color palette by clicking on the current color.

COLORS

- Page background: #ffffff
- Header background: #ffffff
- Nav text color: #333333
- Nav 'active' color: #b5b5b5
- Link color: #4d79f9
- Article text color: #333333

Templates

Help docs also offers a number of options for templates including the Header, Footer, Article, Category, Home and Search.
Download a sample to see what the code looks like, and when you're ready to go, just copy and paste your code into the available box. Finally click Save Changes.

Custom code

To upload a style sheet, click and browse to your style sheet and select upload.

You can also insert HEAD code to your docs site which can be good for custom JavaScript or something like Google Analytics

Categories

Categories allow you to organize all your support Docs in easy to find locations. Individual Categories may be named whatever you want.

Categories are listed on the main panel with the number of articles in each category displayed to the far right of the category. Click on the drag icon to the left of the category name to rearrange its ordering.

Adding a new category

To create a new category, click on the Green New Category button in the top right corner. Then type your new category name and then select Add.
**Editing an existing category**

To edit an existing category, hover your cursor on the category. Two grey icons will appear to the right:

- The first allows you to create sub categories under the main category. The second is the option to open the category details for editing.

To edit an existing Category, click the pencil icon. This brings up the Edit Category box from here you can:

- Edit category name.
- Choose to nest the category under another (or make it a top-level category).
- You can also give the category a slug, which will make up the final part of the page URL. So, if the slug is “passwords” then the page URL might be yoursite.teamwork.com/passwords.
- Switching on, “On homepage” will allow that category to be on the front page of your docs site.
- Old URL: If moving from another system to Teamwork Desk, you can input the old URL of a specific category (you can also do this for individual docs) and Teamwork Desk will automatically redirect them to the new version.
Comments

Disqus allows you to embed a comment system into your Help docs site. To enable Disqus on your Teamwork Help docs site, please follow these steps:

Go to https://disqus.com/admin/create/ and set up an account.

Once your account is set up, go to the Disqus admin panel > Settings > and get your shortname.

Go to your Teamwork desk account > Your Avatar > Settings > Help docs > Help Doc Site > Comments > and add your shortname.
On the editing screen of each article, you can check the box on the right in the Comments section to enable Disqus on that article.

Disqus will now be shown on your article.

**Tag Settings**

Tag settings can be accessed from the lower navigation bar, when in the Settings view.

From here you can see:

- The tags already on your desk account
- The names of the tags
- The number of tickets with that tag on it.
- Inactive tags are just tags that have not been associated with any ticket. Once they are on one ticket they are no longer inactive.
Sort Tags
You can sort by:

- When last updated.
- Inbox.
- By count/name/date last updated.

To view the tickets listed under a tag:

- Click on the tag you want to view tickets for.
- Click the view tickets icon.

To change the colour of a tag:

- Click on the tag you want to change.
- Choose the colour you want the tag to be and it will change.

To merge tags:
• Click on the first of the tags you want to merge.

• Click “edit tag”.

• Click on the next desired tag.

• Click on the merge icon.

• Name the new tag as required.

• You can merge as many tags as you wish.

To delete a tag:

• Click on tag/tags. Then click the “rubbish bin” icon.

Apps

The Apps settings is a central area to review what apps Teamwork have available to users. This section is available from the ‘Apps’ tab in the lower navigation bar when in the Settings view. This area will display Apps that can be integrated with Teamwork Desk.

There are three apps available:

• **Teamwork Projects**: Projects are enabled by default. You can access Projects by clicking the product switcher icon next to your user avatar.

• **Teamwork Chat**: Teamwork Chat is a completely free chat client from Teamwork.com. It uses the same login details and integrates fully with Teamwork Desk.

• **Time tracking**: Time tracking for Teamwork Desk enables your team to understand precisely how much time you are spending answering tickets. With automatic and manual entry modes tracking time in Desk is painless and effective.
Time tracking is only available on the Pro Plan.

**Access Contact Form**

Here you can see your widget information. The existing widgets you have are displayed at the front, what date they updated and the ability to delete them. Just click on them to edit an existing one, and you can create new ones by clicking on ‘Create New Form’

To create or customize a widget you are given the same options.

**Step 1:**

- **Name:** Name the widget
- **Position:** Where you want the widget to appear on the site.
- **Theme:** If you want it light or dark coloured.
- **Colours:** Choose your colours.
- **Inboxes:** Which inboxes would you like to allow customers to submit tickets to? (At least one is required.)
- **Help docs:** Include your help doc sites and articles to allow customers to find answers to their questions quickly and easily before opening new tickets. Select which public sites you would like to include.
Step 2: Copy the embed code to your page.

Based on what you selected in step one we have customized your embed code in a way that will allow you to copy it and the paste into your own site. Copy this code onto your web page where you would like the widget to appear. Once you click save in Step one the changes will be made live in step two.

Billing Settings

Billing settings can be accessed from the Billing tab in the lower navigation bar, when in the Settings view.

Subscription

On this page you can see what price plan you are on and the prices of each plan and if it is annual or monthly and you can switch plans or from monthly to annual, and vice versa.

At the bottom of the page you can cancel your subscription. Your account (and all functionality) will remain active until the end of your billing cycle.
A few things you need to know once you select to cancel the account:

- Mail forwarded to your account will be rejected
- Your customers will no longer be able to log in to the portal
- Any embedded contact forms will no longer be displayed
- We will keep your account and all data available for 60 days should you choose to come back.

Usage

Here you can view this periods billing, this will show either annual or monthly depending on your payment plan request and the cost associated with it.

- **Billing plan**: Which subscription plan you are on - Startup, Basic or Pro and Monthly or Annual.
- **Billing period**: The date range you are currently paying for.
- **Full time agents**: These are the agents that you pay for and this will show you the total cost which is based on the amount of full time agents multiplied by the time period (annual or monthly) by the subscription plan that you are on. This will also show the calculation.
- **Part time agents**: The number of part time agents you have on your account. This is only relevant for Pro Plan users as they are included for free.
- **Help doc sites**: Any Help Doc beyond the initial one that comes with your Teamwork Desk account will be charged for.
- **Next payment date**: The date your next payment is due by.
- **Total cost**
This shows the **Credit card details**
current payment card details on the system. Information included is:

- Name on card.
- Card number - last 4 digits.
- Expiration date.
- Card type.

You can also change the credit card details on file and input your VAT number here too and if you are within the EU you can enter in your business VAT number here as well.
Billing History
Here you can view your payment history.

- **Type**: payment, sign up etc.
- **Date**: date of payment.
- **Subscription ID**: Either your payment ID from Stripe for payment cards, or your PayPal transaction ID.
- **Status**: Completed or Failed (if the payment has failed).
- **Amount**: Amount paid.
- **View invoice**: click on this to see the relevant invoice - you can download a PDF copy on the pop up window as well.

![Billing History Table]

Billing settings
Here you can see where the invoices are emailed to and you can update the email address if required.

![Billing Settings]

VAT details
If you are a business customer within the EU, you can enter your VAT number or see which one is already on the system.
Log out

You can access the help options by clicking on the avatar at the top right-hand corner of the screen. From here a drop-down list will be presented, from which you can select Log Out.

Selecting 'Log out' will log you out of your Teamwork Desk.