

pitney bowes



USER GUIDE

Freshdesk Companion



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INTRODUCTION

Manage and update all Customer Support tickets on Freshdesk with automatic ticket creation for failed and delayed deliveries.

The Freshdesk Companion App is an easy way to integrate your Freshdesk account on to your SendPro Device. Now you can close your customer support tickets faster with the Freshdesk Companion app.

APPLICATION FLOW

1. ONBOARDING – Login to your Freshdesk account
2. GETTING STARTED – Information on the basic functionalities of the app
3. CREATE TICKET – Creating a new ticket on Freshdesk
4. VIEW STATISTICS OF THE TICKETS- View the volume of tickets in each category
5. VIEW ALL THE TICKETS- View the information about all the tickets
6. REPLY TO A TICKET- Send a reply to the ticket

STEP 1: FIRST TIME USERS

1.1. FRESHDESK ACCOUNT SETUP

To get started click on Freshdesk Companion plug-in icon from your App Dashboard. You will receive an email from Pitney Bowes Support Team regarding your Freshdesk account credentials. We recommend you to change the password when you will login to Freshdesk Companion application for the first time.

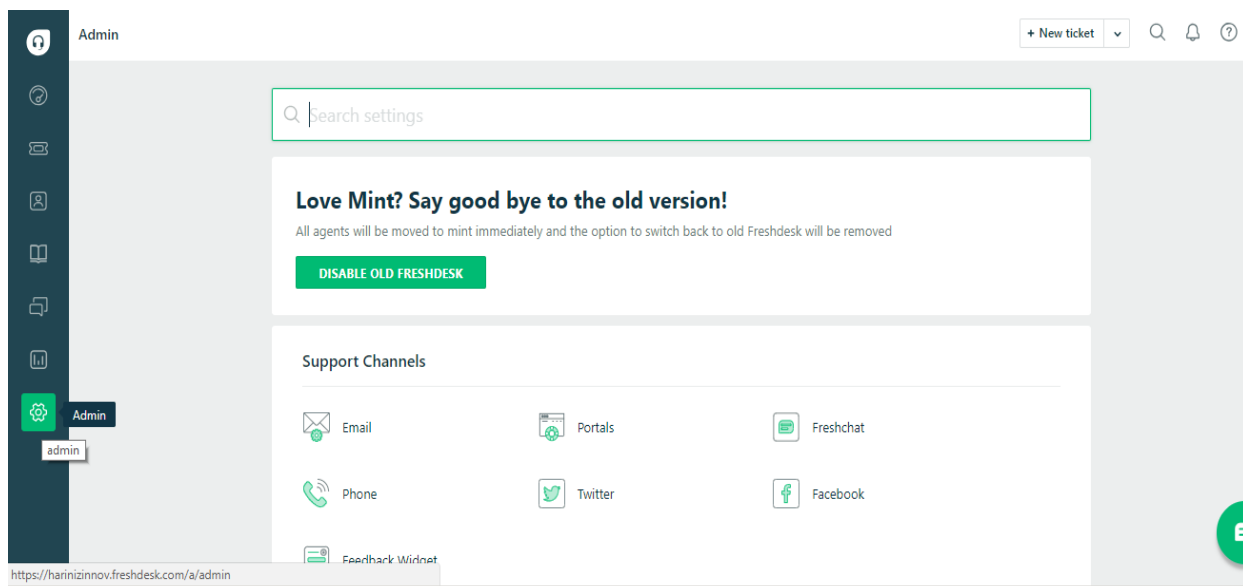
In case of an existing account, you can use your existing login credentials to directly login to the application (you can directly move to '1.5 Login to Freshdesk Companion App').

1.2. COMPLETE PROFILE ON FRESHDESK.com

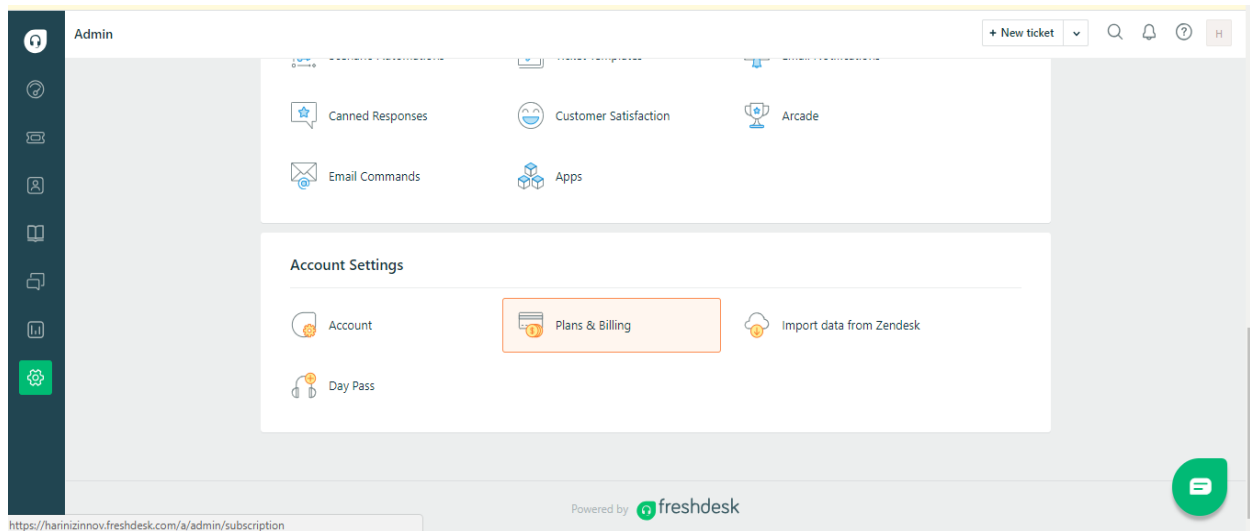
After receiving your credentials, you can go to freshdesk.com to complete your profile.

1.3. PAYMENT AND UPGRADING OPTIONS

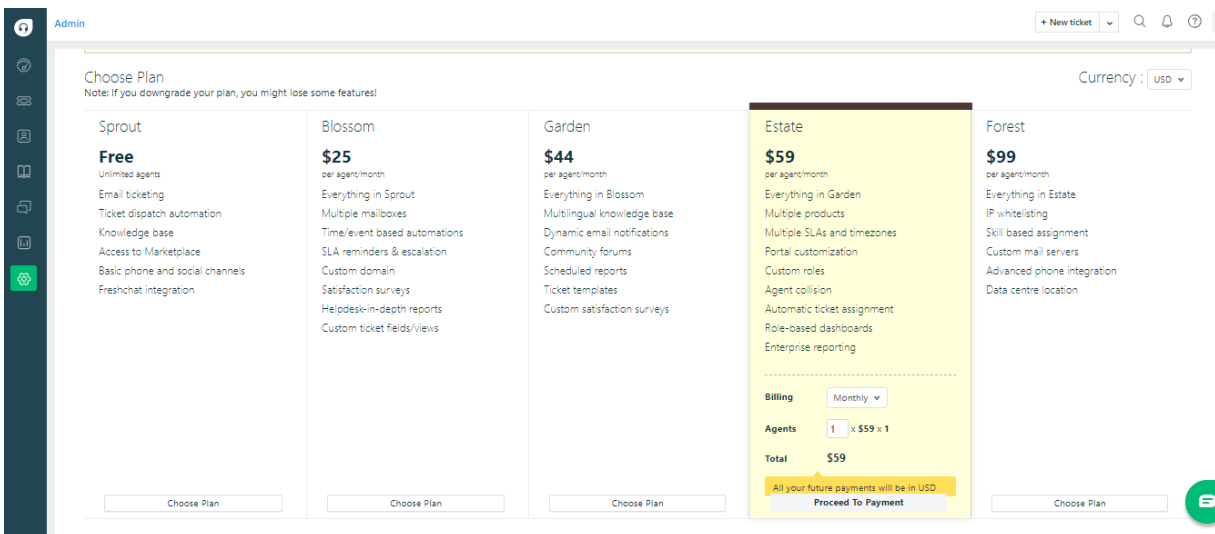
To opt for an advanced plan, select 'Admin' tab on the toolbar given on the left side of the home screen (as shown below).



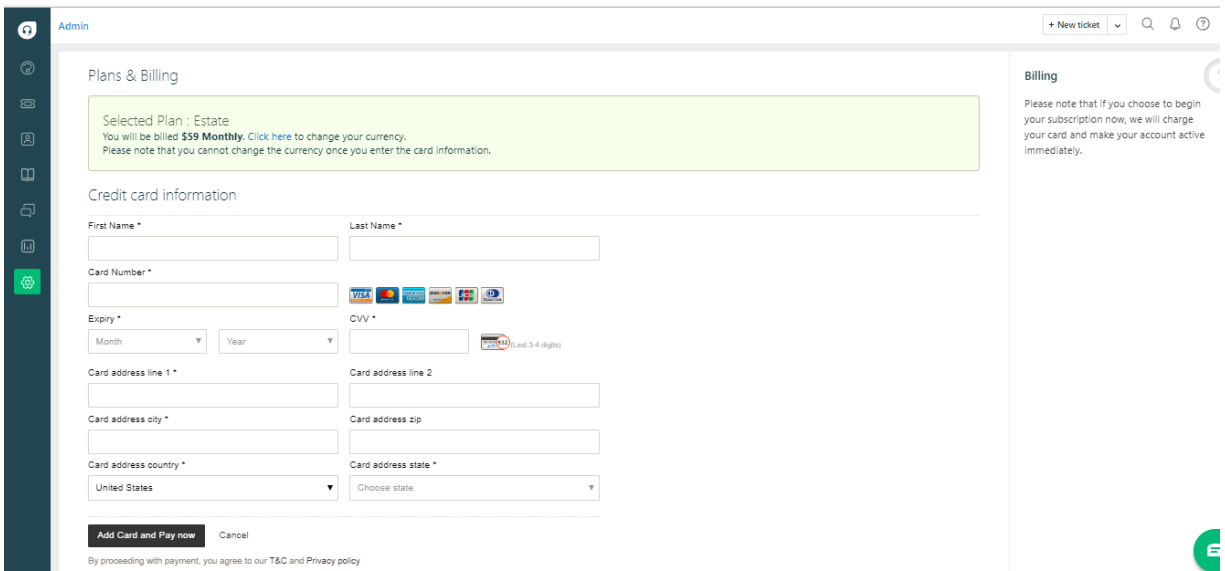
Select 'Plans and Billing' under 'Account Settings' to upgrade your plan (as shown below).



Select the plan by clicking on 'Choose Plan'. Enter the number of users and the billing schedule and click on 'Proceed to Payment'.

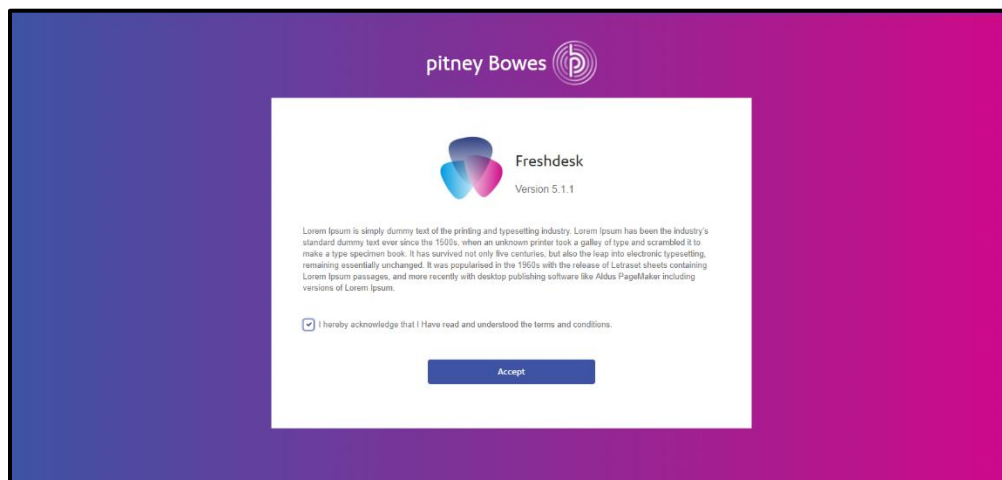


Enter your credit card details and click on 'Add Card and Pay now' to upgrade your plan.



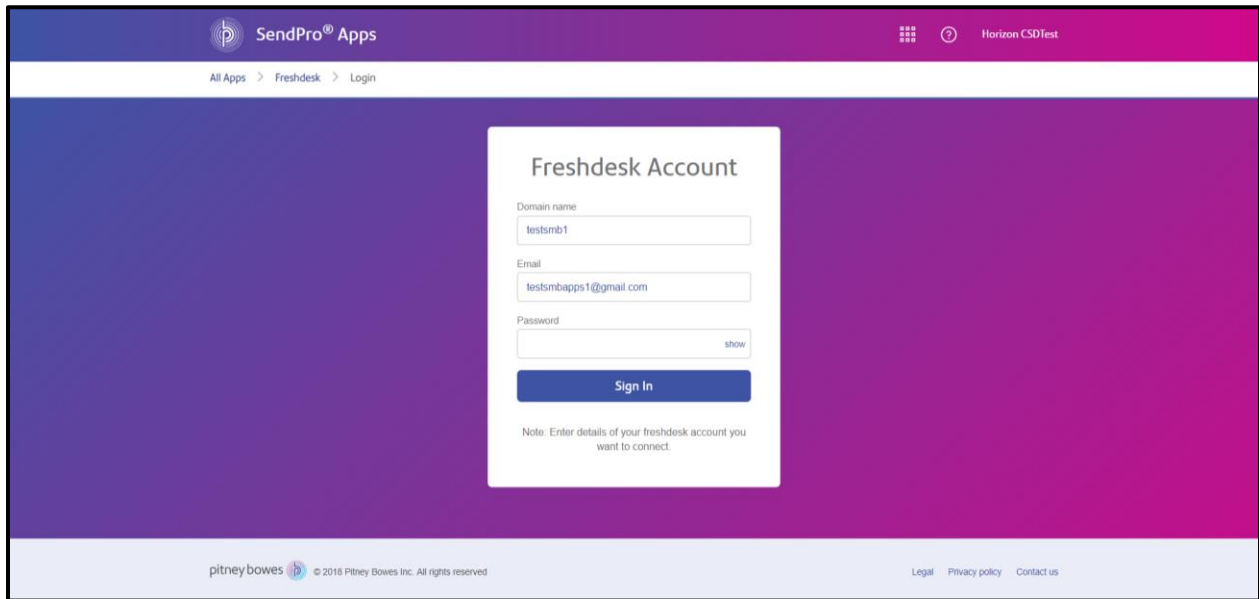
1.4. LAUNCHING THE FRESHDESK COMPANION APP FOR THE FIRST TIME

Click on the Freshdesk Companion app icon on the app Dashboard. You will be directed to the Terms & Conditions screen. Scroll through the Terms and Conditions. Once you have read and understood them, select the check box provided and click on 'Accept' to proceed. Please note the 'Accept' button will not be activated until you have scrolled down completely.



1.5. LOGIN TO FRESHDESK

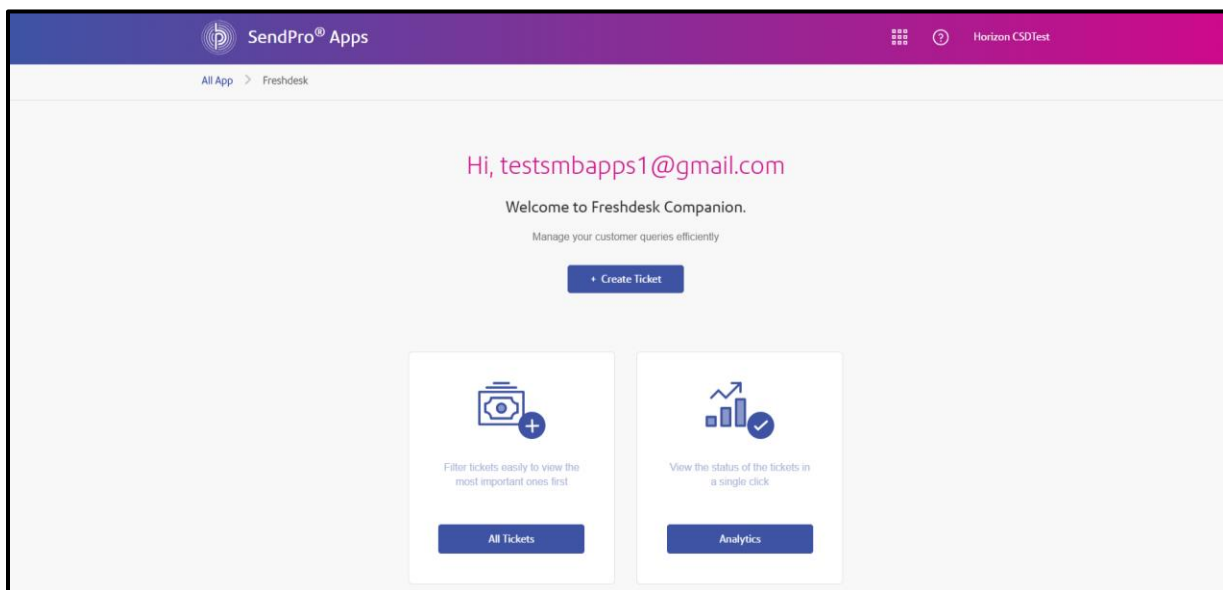
On clicking the 'Accept' button, you will be directed to the 'Sign-in' page where you will need to enter the domain name, email address and password to sign-in to the Freshdesk Companion app. The app automatically syncs all support tickets and customer data from Freshdesk directly. You will get the domain name, email address and password via email from the Pitney Bowes Support team.



STEP 2: DASHBOARD FOR REGULAR USERS

Upon launching the app, you will be directed to the Dashboard as shown below.

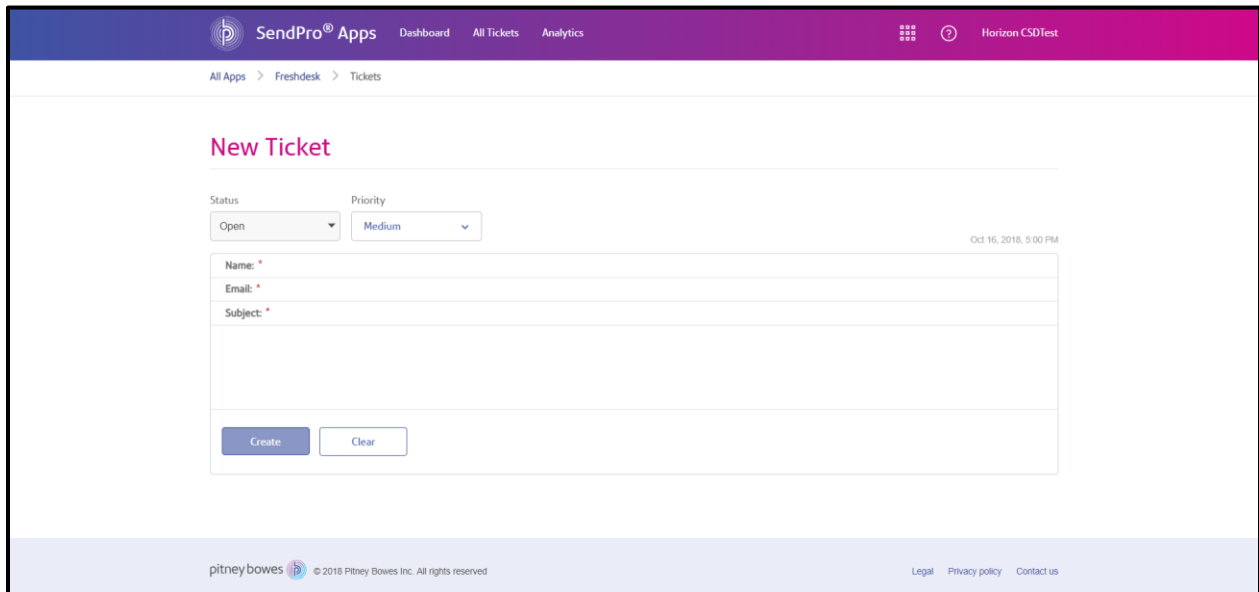
You can view all tickets by clicking on the 'All Tickets' option. Clicking the 'Analytics' option will display the volume of tickets that are open, pending, closed and resolved. To create a new ticket, click on the 'Create Ticket' button provided on the screen.



STEP 3: CREATING A NEW TICKET

To create a new ticket, click on 'Create Ticket' button on the dashboard screen and you will be directed to the below screen.

Enter your name, email address, subject and the description for the customer query in the fields provided. Assign a priority to the ticket using the 'Priority' drop down list. Once you have entered the ticket information click on 'Create' to submit the information and record the ticket.



The screenshot shows the 'New Ticket' form in the Freshdesk Companion app. The form is titled 'New Ticket' and is located in the 'Tickets' section of the 'Freshdesk' app. The form includes the following fields and options:

- Status:** A dropdown menu with 'Open' selected.
- Priority:** A dropdown menu with 'Medium' selected.
- Name:** A text input field with a red asterisk indicating it is required.
- Email:** A text input field with a red asterisk indicating it is required.
- Subject:** A text input field with a red asterisk indicating it is required.
- Buttons:** 'Create' and 'Clear' buttons are located at the bottom left of the form area.

The form is displayed on a mobile device screen, with a navigation bar at the top showing 'SendPro® Apps', 'Dashboard', 'All Tickets', and 'Analytics'. The user's name 'Horizon CSDTest' is visible in the top right corner of the navigation bar. The bottom of the screen shows the 'pitney bowes' logo and copyright information: '© 2018 Pitney Bowes Inc. All rights reserved.' and links for 'Legal', 'Privacy policy', and 'Contact us'.

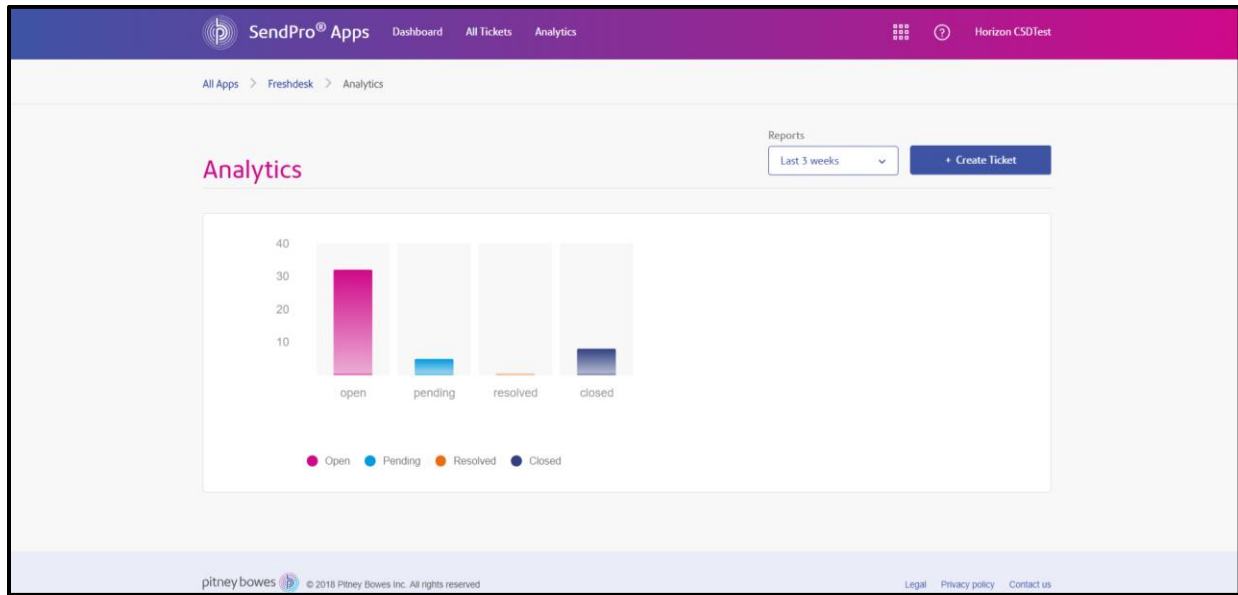
STEP 4: AUTOMATIC CREATION OF TICKETS

The Shipping Alerts & Reports app provides notifications in case of failed and delayed deliveries or incorrect addresses. These notifications are recorded by Freshdesk and are converted to tickets.

These tickets can be viewed and edited through the Freshdesk Companion app.

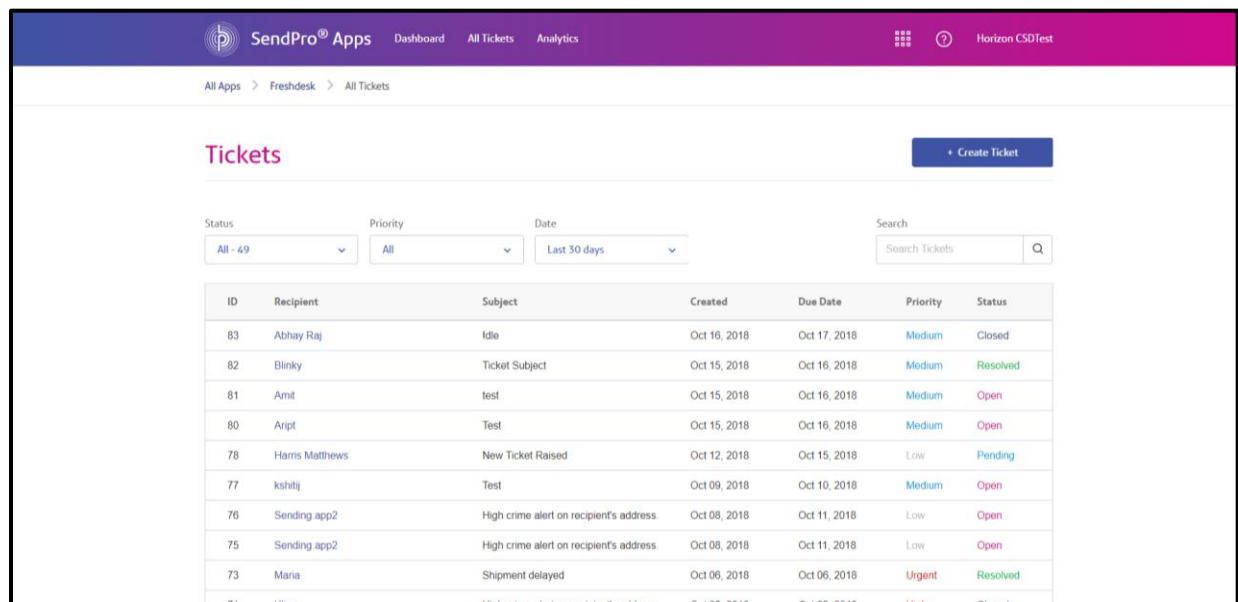
STEP 5: VIEW ANALYTICS OF THE CUSTOMER SUPPORT TICKETS

Select the 'Analytics' option from the Dashboard to view the volume of open tickets, pending tickets, resolved tickets and closed tickets. Hovering the cursor over each ticket category will highlight the details and display the volume of tickets under that category. You can also select the time duration for which you want to see the statistics of the tickets by choosing the option from the 'Reports' drop-down menu. You can also create a new ticket by clicking on the icon at the right hand side of the screen.



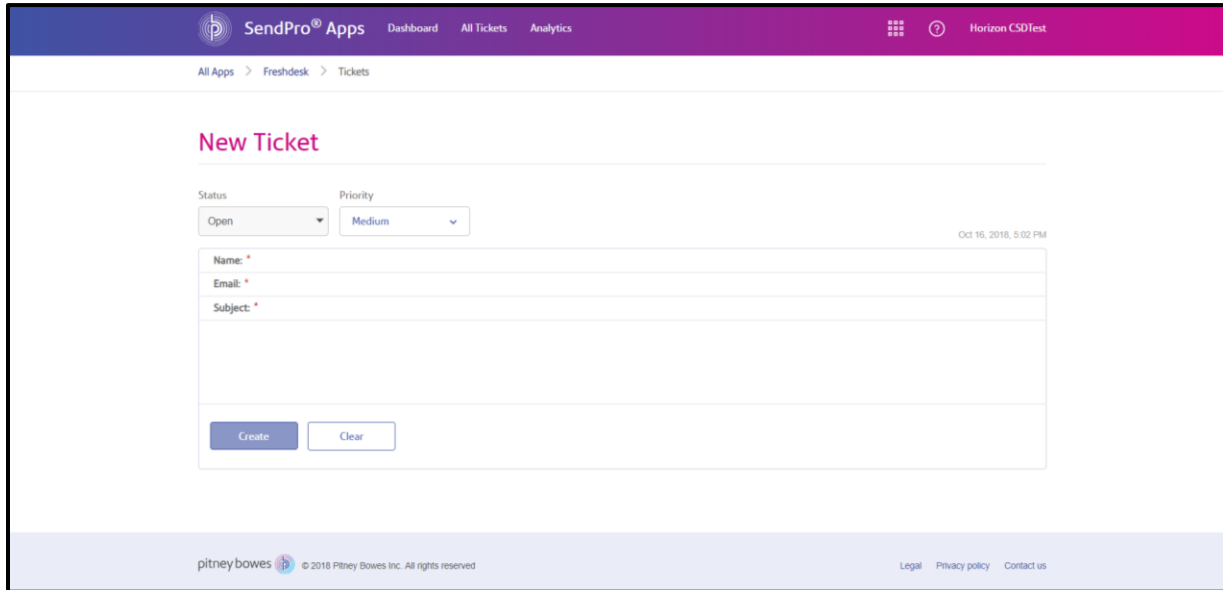
STEP 6: VIEW ALL TICKETS

Select the 'All Tickets' option from the Dashboard to view the entire list of tickets. The tickets details are displayed along with their priority, status, due date and created date (as shown below). You can use the Search Bar to search for specific tickets. You can also filter the tickets as per preference by selecting an option from the drop-down menu.



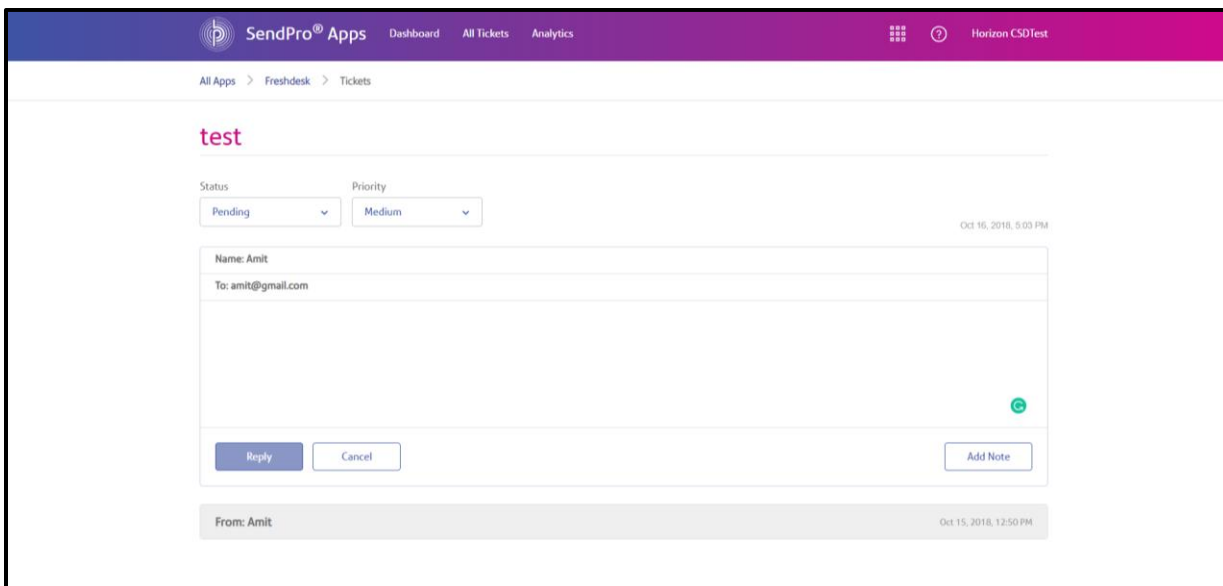
ID	Recipient	Subject	Created	Due Date	Priority	Status
83	Abhay Raj	Idle	Oct 16, 2018	Oct 17, 2018	Medium	Closed
82	Blinky	Ticket Subject	Oct 15, 2018	Oct 16, 2018	Medium	Resolved
81	Amit	test	Oct 15, 2018	Oct 16, 2018	Medium	Open
80	Aript	Test	Oct 15, 2018	Oct 16, 2018	Medium	Open
78	Harris Matthews	New Ticket Raised	Oct 12, 2018	Oct 15, 2018	Low	Pending
77	kshltj	Test	Oct 09, 2018	Oct 10, 2018	Medium	Open
76	Sending app2	High crime alert on recipient's address.	Oct 08, 2018	Oct 11, 2018	Low	Open
75	Sending app2	High crime alert on recipient's address.	Oct 08, 2018	Oct 11, 2018	Low	Open
73	Maria	Shipment delayed	Oct 06, 2018	Oct 06, 2018	Urgent	Resolved

Click on a specific ticket to view further details. The ticket details screen displays the customer name, subject of the ticket, description, date. To change the priority or status of individual tickets, you can select the desired options by clicking on the icon beside the current priority or status. Select the desired option from the drop-down menu. Submit your reply by clicking on the 'Reply' button at the bottom of the ticket.

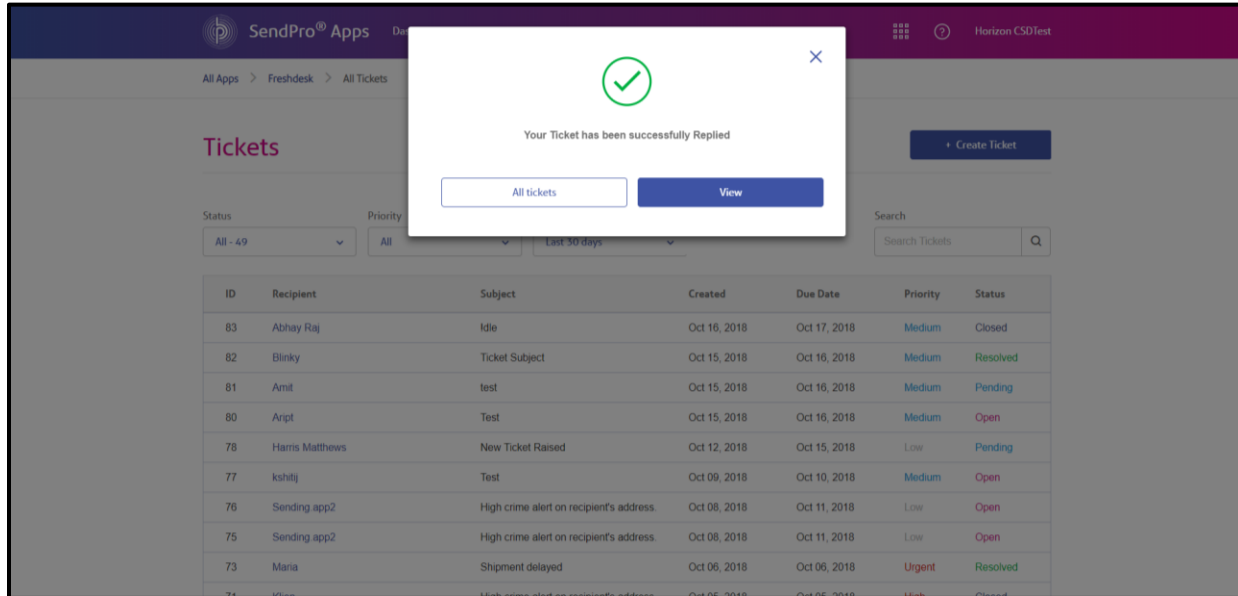


STEP 7: REPLYING TO A TICKET

To respond to the tickets, go to the 'Ticket Details' screen and click on the 'Reply' button. You can then enter your response based on the ticket and reply to the customer.

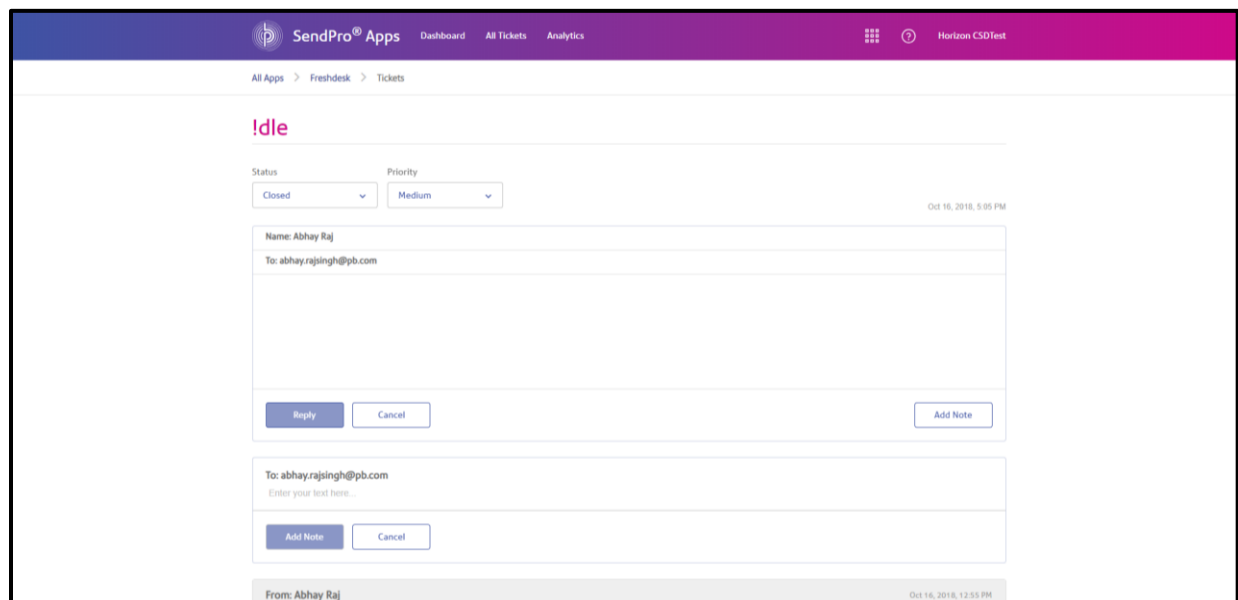


After clicking on the 'Reply' button, you will receive a confirmation as shown below.



STEP 7: ADDING A NOTE

To add a note to your tickets, go to the 'Ticket Details' screen of the respective ticket. Click on the 'Add Note' button at the bottom right corner and add a note for the respective ticket.



Frequently Asked Questions

1. GENERAL QUESTIONS

1.1. What is Freshdesk?

Freshdesk is a customer support software that streamlines all the customer conversations at one place, resolves customer support issues and updates the customer support tickets to improve customer experience.

1.2. What are customer support tickets?

Customer support tickets refers to the issues and concerns raised by customers.

2. ON-BOARDING

2.1. Do I need a separate Freshdesk account for Freshdesk Companion App or can it work with my current Freshdesk account?

Your existing Freshdesk account can be used to login to the app. All customer queries and customer data will be synced with the app.

2.2. I don't use Freshdesk, can I still use the Freshdesk Companion app?

No, it is necessary to have an account on Freshdesk to use the app. If you do not have any existing account in Freshdesk, you can create an account for free on the Freshdesk website and connect the account to the app.

2.3. How to get started with the Freshdesk Companion app?

You will require the domain name, email address and password of your Freshdesk account to sign-in to the app which would be provided to you by the Pitney Bowes Support team. The app will then automatically sync all your existing queries and customer data from your account.

2.4. What information is required for creating an account on Freshdesk?

To create an account on Freshdesk, you will first have to place an order with Pitney Bowes and we will send you your login credentials via email.

2.5. Do I need my credit card details for setting up an account in Freshdesk?

No. You do not need your credit card details. You can just log in to the Freshdesk Companion app by entering the log-in credentials provided by the Pitney Bowes Support team. To upgrade to an advanced plan, you can check the pricing section on the Freshdesk website.

The advanced features of Freshdesk like time tracking, scheduled reports, satisfaction surveys, skill-based ticket assignments etc. are available on the paid subscription plans that will require your credit card details.

2.6. Can I change my subscription plan at any time?

Yes. You can upgrade your plan anytime on the basis of the number of users and the billing schedule. Go to the 'Account Settings' option in your Freshdesk account. You can then choose from the provided paid subscription plans.

3. MANAGING CUSTOMER QUERIES

3.1. How will I sync customer data from my Freshdesk account directly?

Once you login to the Freshdesk Companion app, the customer data will be automatically synced from your Freshdesk account.

3.2. Is my customer data secure with Freshdesk Companion app?

Yes, Pitney Bowes ensures the security and privacy of your data. All confidential business data related to your customers is secured on the Freshdesk platform. No data is stored on the Pitney Bowes platform, reducing any chances of data being stolen.

3.3. How are tickets created automatically?

The Shipping Alerts & Reports app generates notifications in case of failed or delayed deliveries. These notifications are recorded by the Freshdesk Companion app and are automatically converted to tickets.

3.4. Can I reply to a ticket directly through the app?

Yes, you can directly respond to customer queries through the app. On the 'Ticket Details' screen, select 'Reply' to respond to your customers.

3.5. Can I search for a specific query or customer?

Yes, you can search for specific queries using the fields of recipient name, subject and date, priority and status. Go to 'All Tickets' screen from the dashboard and select the 'Search' icon on the top right side. Enter your key words to search for a particular query.

3.6. Can I view the history of a specific conversation with the customer?

Yes, you can view all the previous messages related to a conversation for a specific customer in a single view by searching the 'All Tickets' screen accessible via the Dashboard.

3.7. Can I assign priority to tickets?

Yes, you can assign different priorities to tickets within the app. Specific queries will also display their corresponding priority level. You can also sort and filter tickets based on the assigned priority level.

3.8. Can I update the status of the customer issues?

Yes. You can update the status of the customer issues as per your conversation with the customer. On the 'Ticket Details' screen, you can edit the status for the ticket as required.

4. PAYMENTS

4.1. How to make the payment for using Freshdesk?

Freshdesk Companion app is free to use. The basic version of Freshdesk is free to use. However, you will be required to pay a subscription fee to access more features such as time tracking, scheduled reports, satisfaction surveys, skill-based ticket assignments etc.

You must have a valid credit card on file (Visa, Master Card, American Express, or Discover) for advanced subscription plans. You will be charged as per your plan and the amount would be deducted automatically from the credit card details provided.

You can also refer to the app user guides for more detail into the application workflow.

For more information regarding the app, contact us at +1-800-522-0020