Overview and Workflow

Overview

Organizations use a Freshdesk to communicate with the customers to answer their queries or solve their problems. The help-desk is manned by people who are trained on the working of the products and system within the organization and can assist the customers for routine queries and problems. These people are called the help-desk agents

However, for some tickets, the agents require to collaborate with other experts within the organization for quick and quality resolutions.

The Freshdesk + Ideolve integration provides an efficient way of collaboration between the agents on Freshdesk and experts in the organization for quick and quality resolutions of customer tickets.

Automatic sharing of all the communication between the customer and agents with the experts reduces the resolution time drastically and also improves the quality of the response.
Other benefits include:

- Automatic creation of a knowledge base that can be used to improve the products and the documentation.
- All staff engaged in providing solutions do not need a Freshdesk account.
- All ticket information archived to Ideolve

Workflow

- For every account on Freshdesk, a corresponding work-space has to be created on Ideolve.
- While the Freshdesk agents have an account on Freshdesk and Ideolve, the experts will have accounts only on Ideolve.
- Whenever a new ticket is created in Freshdesk, a corresponding note is created in Ideolve. By default, it is not shared with any groups on Ideolve and is visible only when the helpdesk@ user logins to Ideolve. This helps reduces clutter on Ideolve while still ensuring all ticket communication is archived on Ideolve.
- Whenever the customer or the agent communicates on the ticket, the Ideolve note will be updated with a comment. The comment will record the communication.
- Now when the agent wants to collaborate with an expert within the organization to resolve the ticket, he will simply change the status of the ticket. Let's say, he changes the status to "Escalate to Expert". The update ticket rule configured on Freshdesk will update the title/subject of the note on Ideolve and the note will be shared with the expert group created on Ideolve.
- Each member of the expert group will get an email alert.
- Experts can then login to Ideolve, browse through all the communications, and other information provided by the helpdesk agent, and provide the resolution as a comment in Ideolve.
- The helpdesk agent will review the comments and resolve the ticket.