WebSupport / WebSupport PRO User Manual

Version 1.0
April 2004 IG

Table of Contents

Quick Start Guide

For those of you that hate to read, we have tried to put together a quick start guide here to get you up and running in just a few minutes. Follow the steps below and you should have your Administration Panel configured quickly.

1. Log into your account by clicking the “Sign In” button on the SupportSentry website at http://www.supportsentry.com/

2. Scroll down the page to the "WebSupport Account" section and click the "Log In" link.

3. The first time you log in, you will be taken through the Guided Setup for your new account. We will cover each step below:
    a. Enter a name for your default account. This is usually going to be the name of your website. For those of you with one website, this is not much of a concern. For those of you using WebSupport for multiple sites, we recommend naming each account after your domain names. NOTE: You can change any of this information later from the configuration section of the Administration Panel.
    b. Enter "Default Reply Name". Enter the name you want displayed when your replies arrive. Examples include:
    - The xyz.com Staff
    - Your Company Customer Service Dept.
    c. Enter "Site Title". Enter the title of the web support panel your users will see, when creating or checking the status of their requests. Again, you will most likely want this to be the name of your comany or domain name.
    d. Enter "Top Header Graphic". This is optional and can be added at any time. If you have a header graphic you would like to display in the support panel your users will see, enter the url where it can be accessed on the web. NOTE: We do not host images on our servers, so this image will need to be hosted elsewhere on the internet. The second box allows you to define the height of the header where the image will be placed. We recommend this number be 5 greater than the height of your image (This will create better spacing on the page). You can find out the height of your image by right clicking on it (in Windows), selecting "Properties", and you will find the dimensions on the window that pops up.
    e. Enter "Notification Email". This is optional. Enter the email address (or addresses) you would like notification emails sent to when a new support request comes in. If you do not want to receive notification via email, simply leave this one blank.
    f. Enter "Home Page URL". Enter the home page URL (http://www.yoursite.com/) of the site where you are using the support panel. When users click the 'Home' link on the left side of the support panel they will be taken to this page.

g. Enter "Email Signature". Enter the "signature" or information you would like inserted at the bottom of all replies or emails you send out via the WebSupport system for this account. You may want to include your home page, contact phone number, etc (see below for example). NOTE: Users with multiple websites configured in WebSupport, rest assured, that our system will reply to requests with the information and signature files for the account they are received on. Here is an example “Sig”:

   Regards,

   The XYZ.com Staff
   info@xyz.com
   http://www.xyz.com/
   The best website for XYZ

h. Turn On/Off "Knowledge Base Feature". One of the most advanced pieces of the WebSupport system is the Knowledge Base/FAQ feature. The system can automatically build a Knowledge Base (a database of information or frequently asked questions) that is searchable by your customers. The system can also automatically reply with answers it feels may help solve your user's requests before you even see their question. The system defaults to turning the knowledge base feature on.
i. Turn On/Off "Use Tracking Links". This options specifies whether individuals will have to go to a web page to get their responses. If you mark yes then when you answer a request the user will get an email with a link where they can view your response. This can be useful because then the user can specify if your response helped, and if not input followup information. Marking no means all responses to requests submitted will be sent to the users by email. Most of the time you will want to mark 'No' for the convenience of your users.
j. You have completed the guided setup and can now use your WebSupport system. You can click the text link to "Get link code" to place on your website if you are going to use customer support panels (rather than accepting your requests via email in which case you will need to setup an email alias as described below) on your website. We recommend using the panels to help combat any spam problems you may be having by removing email addresses from your website(s).

Your WebSupport account is now setup and configured to a point where it can function normally. However, the WebSupport system is much more robust and can help you save time by configuring other features, including.

- Editing the text of your default emails
- Adding and editing "Canned Responses" or frequent responses, salutations, or information you provide on a regular basis
- Customize the look and feel of your support panel by changing the panel colors, header image, title and more.

Requests and the Requests Button Group

The "Requests" button displays the pending requests in your WebSupport panel. By clicking the Requests button, you will also display the rest of the Request Button Group items in the navigation panel on the left side of the screen (These include: Requests, View Answered Requests, Solved Requests).

Let's explain a little more about each button and its function in the WebSupport system.

Requests

By clicking the "Requests" button, the system will display all pending requests (those that have not been answered or solved) in your WebSupport account for the default time period (see below in this section).

Starting at the top of the screen, there are tabs for "Oldest First", "Newest First", and buttons for each account you configure in your WebSupport account (if you only have one website or one account configured, you will simply see the name of your default account here). By clicking on the Oldest or Newest First tabs, the requests in your queue will be sorted according to when they arrived. Clicking on any of the account tabs, will take you to requests for that individual account. To return to the original view, click the "Requests" button on the left side navigation panel.

The Requests screen displays the subject of the request, time and date received, name and email address of the client, the account it was submitted to, and current status in the WebSupport system.

In addition to the basic information associated with each request, the screen allows you to select individual requests with a check box in the far left column under "All/None". By checking a request or multiple requests, you can use the drop down menu below the requests to batch process the items you have selected. Using this drop down menu entitled "Select Action", you can mark the selected requests Pending, Solved, or Answered or you can delete them. At the far right side of the screen the last column give you links to either Delete or Mark Solved for each individual request.

At the bottom of the Request screen, you can select how many days you would like to display requests for. The system defaults to 60 days. To modify this, simply enter a new number in the box and click the "Go" button.

View Answered Requests

By clicking the "View Answered Requests" button, you will be able to view all of the requests that have been answered by you or your support staff. "Answered" requests differ from "Solved" requests in that solved requests must be marked "Solved" either by the person who submitted the request, or by someone on the support staff (People who submit a request will receive confirmation emails upon request submission, and when there is any other change of status in their request).

View Solved Requests

By clicking the "View Solved Requests" button, you will be able to view all of the requests that have been marked solved, either by the person making the request or by someone on your support staff.

Configuration Button Group

Clicking the Configuration button on the navigation menu will display the configuration screen (or selection screen for people with multiple websites/accounts configured) and display the Configuration Button Group in the navigation menu.

The Configuration screen is like the "Preferences" menu in many programs you may be familiar with. Here you can configure many of your account defaults including names, email addresses and customizing the colors and images used in the support panels your customers will see (each account or site can be individually configured).

Let's explain a little more about each button and its function in the WebSupport system.

Configuration

Clicking the "Configuration" button will take you to the main configuration screen. For those of you who have added additional accounts/websites to your WebSupport account will be taken to an account selection screen. Simply select the account you want to configure from the drop down box and click the "Select Account" button.

The top table of the Configuration screen is titled, "General Configuration". This table holds all of your preferences or default information about your company or website. Located directly underneath the title, are 3 links, GUI Config, Refresh This Panel, and Preview Account (your account name will be displayed rather than "account"). The Gui config will take you to the lower table on the screen for the Graphical User Interface Configuration (more on this below). Clicking the "Refresh This Panel" will reload the panel allowing you to verify changes you have made (you must click the "Save Options" button at the bottom of the table to save your changes). Clicking the "Preview Account Panel" link will open a new window with the panel your customers will see.

> **IMPORTANT**: You must click the 'Save Options' button in order for any changes you make to be saved and take effect.

Now let's go through each section in the General Configuration Options table.

- **Default Reply Email Address** - This is the "Reply To" email address emails from the WebSupport system will use (if your customer replies to a WebSupport email, it will go to this address). NOTE: WebSupport PRO users will need to setup an email alias for any email address they want the WebSupport system to accept emails for. For instance, if you want to send all emails sent to info@yoursite.com and sales@yoursite.com to the WebSupport system, simply set up (or have your webmaster setup) an alias for those email addresses to forward to the address we give you in your confirmation email (or sign in to your account on SupportSentry.com and you will find it there)

- **Default Reply Name** - This is the name displayed by some email programs indicating whom an email has come from (i.e.: Your Company, The XZY.com Support Staff, etc).
- **Knowledge Base Feature** - Selecting "Yes" will turn the Knowledge Base/ FAQ feature on. The KB/FAQ feature will allow you to build a Knowledge Base with requests and answers in real time as well as by using the Knowledge Base/FAQ builder in WebSupport and WebSupport PRO. For detailed information on how to use this feature, see the Knowledge Base/FAQ section. Selecting "No" will turn this feature off.
- **Site Title** - Title for support panel and header section if no header graphic is provided.
- **Notification Email** - Email address, or list of email addresses separated by commas, to which notifications of new requests are sent. Leave this field blank if you do not want to be notified by email of new requests.
- **Contact Phone number** - Phone number added to emails (can be blank)
- **Home Page** - URL used to link the header image to your website's home page (can be blank)
- **Use Tracking Links** - Specifies if users are required to log in to get their answers and track requests. No means all responses are done through email without tracking links (only available for WebSupport PRO users).
- **Account Name** - Name displayed inside the WebSupport system. We recommend using the domain name of your site (especially if you configure multiple sites).
- **Top Header Height** - Size of the top header. Does not need to be changed from the default value of 35 unless you are using a top header graphic in which case you will want to set it to approximately 5 pixels taller than the actual graphic's height.
- **Top Header Graphic** - Header graphic for the top of the panel. If left blank the Site Title configuration parameter will be used. Should be formatted as full IMG HTML tag: <IMG SRC="http://your_graphic_url_here">
- **Email Signature** - Signature or "Sig" you want included at the bottom of emails that come from the WebSupport system. This will be different for each individual account you set up. Signature example below:

  Regards,

  The XYZ.com Support Team
  http://www.xyz.com/
  support@xyz.com
  Your source for xyz and more.

- **Default Days to Show** - Default number of days in the past to show requests for in the "Requests" screen. The system defaults to 60 days. You can set this here or on the "Requests" screen.
- **Save Options button**. The Save Options button must be pressed after you make changes or else your changes will be lost!

GUI Config

Clicking the "GUI Config" button, will take you to the GUI (Graphical User Interface) Configuration table discussed above.

- **Edit Texts** - Clicking the "Edit Texts" button will take you to the Edit Texts screen. Here you can edit the text copy for all parts of the support panels and requests that your customers will see. There are explanations for each text on each page. Spending the extra 5 to 10 minutes to customize these texts to your site will make a big difference in the user experience for your customers.
- **Canned Responses** - Clicking the Canned Responses button will take you to the Canned Responses page. Here you will be able to Add, Edit and Delete "Canned Responses". Canned responses are frequently used items that you reply to questions with. We have found that most of the questions people have, have been asked many times before. We have built the Knowledge Base feature to automatically reply to these questions for people. But, we have also found that most people don't like to read and will ignore the automatically generated responses sometimes. In these cases, or if you are not using the Knowledge Base feature, you can use the Canned Responses feature to quickly reply to their request.
- **Get Links** - Clicking the "Get Links" button will take you to a page where you can copy the HTML necessary to generate a customer support panel and an Administration Panel as well. Simply select the account/web site you would like to generate the code for and copy away.
- **Guided Setup** - Clicking the "Guided Setup" button will take you to the Guided Setup Wizard. You can run the wizard as many times as you would like or use it after you have added a new account if you find it easy to do things in a step-by-step fashion.

Accounts

Cicking the "Accounts" button will bring up the Account configuration screen. Here WebSupport Standard users can add new accounts (websites) to their WebSupport account.

WebSupport PRO users can also configure email addresses for each account that they would like WebSupport PRO to handle incoming email for. For example, if you use info@yourdomain.com on your website, and you would like email sent to that address to automatically enter the WebSupport PRO queue, you will need to add the address to the appropriate account here and set up and alias to your WebSupport PRO email address (available in the SupportSentry administration panel https://secure.supportsentry.com/ss/signup.cgi).

Send Email

By clicking the "Send Email" button, users can use the WebSupport/WebSupport PRO system to send emails to anyone. This is especially useful for WebSupportPRO users as their users can reply to their emails and have those replies enter into the WebSupport PRO system. Standard edition users will have replies sent to an email address outside of the WebSupport system.

WebSupport PRO users, select the email address you would like the email address to come from and fill out the email address, subject, cc and bcc fields along with your message. WebSupport PRO will insert the appropriate "Signature" file for that domain when you click "Send".

Knowledge Base / FAQ (Frequently Asked Questions)

By clicking on the "FAQ Admin" button you will be taken to the Knowledge Base / FAQ (Frequently Asked Questions) administration screen. This is one of the most powerful functions of your WebSupport system and one that can save you a lot of time. Setting up the KB/FAQ system will take you a little bit of time, but the benefits will pay off in the short and long run.

If you have configured your WebSupport account(s) to use the KB/FAQ feature, your customers/website users will have the ability to search the KB for answers to their questions and customers that submit questions (aka: requests) to the WebSupport system will autmatically receive possible answers to their question upon submission (if there are appropriate question/answer items in your KB/FAQ. Many people already have FAQ sections on their websites and we have built this tool to help you build your Knowledge Base in no time at all. You can also build the KB "on the fly" when you are responding to requests on a daily basis. Please see the "Requests" section for more information or the online help in WebSupport.

Knowledge Base/FAQ Administration

- **Show All Public FAQ/Knowledgebase Items** - Clicking this link will show the entire KB/FAQ and allow you to edit each item or delete it.
- **Category** - This drop down box allows you to organize your KB/FAQ by adding items to different categories (this is optional as you can just add all KB/FAQ items to one "General" category). To add categories please see "Adding Categories" below.
- **Question** - This text box allows you to enter the question people would ask. (If you have a FAQ on your website already, we recommend you simply copy and paste your current FAQ items using this tool)
- **Answer** - This text box allows you to enter the answer to the above question.
- **Publish** - Selecting "Public" will make this KB/FAQ item visible to anyone with access to your Knowledge Base/FAQ. Selecting "Private" will make them visible only to you or other support opertators.
- **Account** - This drop down box allows you to select the account to which you would like to add the KB/FAQ item to. If you have only one website/account configured you do not have to do anything. If you have multiple websites/accounts configured, then you need to be careful and be sure to select the correct account/website when adding items.

Add Category

The second section allows you to add categories to your Knowledge Base/FAQ. To add a category, simply enter the name and click "Add Category".

Delete Category

The third section allows you to delete categories from your Knowledge Base/FAQ. To delete the category, simply select the category you want to delete and then click "Delete Category".

Messenger

The Messenger is a tool that allows us to keep in contact with you. Notifying you of updates, changes to the system, account issues or just to say hello (well, maybe not to say hello). If you see a message in your Messenger, please read it, we will only contact you with important issues.