Updated 10/08/10

# ezSupport's ⁇

## ezSupport Messaging Module

**Save time** and **boost your revenue** from satisfied customers by using the ezSupport Messaging module to help manage and respond to your customer questions.

ezSupport Messaging allows customers to submit questions from your ezSupport help desk under categories that you've customized to gather pertinent information for your business, such as Shipping, Billing, Technical, etc.  Customers use forms for each category with question fields that you are also able to customize.

Questions are automatically routed to the support rep or group that you've designated to be responsible for the applicable question category. Question information is organized and presented clearly, with tools such as canned responses helping reps reply to questions quickly and easily.  And all customer/support rep communication is saved with the customer's contact record for future reference.

An option for automatically responding to questions with matching answers from your FAQ knowledgebase can also be activated in your ezSupport account under Configuration > System Settings > System Options.

**Price**
**FREE!**

# ezSupport Messaging Demo

**This demo illustrates a typical daily experience for both a customer and a support rep using the ezSupport Messaging module to answer a question.**

**Site navigation displays at the top left corner of each demo page, indicating exactly where each step takes place in your ezSupport system.**

**So let's get started!**



## Customer Experience

## Support Rep Experience

## Customer Asks a Question

Our demo company is **AAA Golf**, a golf equipment and supplies retailer.

**Jan** is a AAA Golf customer who wants to know whether she can pick up her order from AAA Golf's local store instead of having it shipped.

Luckily for Jan, AAA Golf uses the ezSupport Messaging system to manage its customer questions, so she'll get her answer quickly.

**Here's how it works...**

### ① Jan goes to AAA Golf's help desk

AAA Golf has links to their ezSupport help desk on their website, on all their eBay listings, and also in their customer emails.  In fact, seeing the clear and easy access that AAA Golf provides for customer support had helped convince Jan to make her purchase from AAA Golf.

*Jan clicks AAA Golf's help button.*

### ② Jan asks her question

Jan first asks her question in the search box at the top of AAA Golf's help desk.  Any matching answers from AAA Golf's FAQs would immediately display, but because no answers match Jan's question, Jan sees a list of categories that AAA Golf has set up to organize and route questions to appropriate staff.

*Jan selects the Shipping category for her question.*

### ③ Jan fills out her question form

AAA Golf has customized their Shipping question form with fields to collect relevant information for shipping issues.  A Details field has been included so customers can submit whatever information they think is necessary.

*Jan fills out her question form and clicks the Send button.  She immediately sees a help desk message confirming that her question has been sent.*

## Customer Submits a Question

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### Or…Jan submits her question directly

AAA Golf also has a help desk link for directly submitting questions. This "Submit a Question" link allows customers to bypass searching AAA Golf's FAQs and immediately send a question to AAA Golf.

If Jan had chosen the "Submit a Question" link, she would have immediately seen AAA Golf's list of question categories, and would have then sent her question using the Shipping form just as shown on the prior page.

### Question Auto-Response Option

Auto response to customer questions is an option when the direct "Submit a Question" feature is used. The message auto-response setting is in ezSupport under Configuration > System Settings > System Options, and when turned on, ezSupport will parse keywords from customer questions and auto respond with any matching FAQ answers. If no matching FAQs are found, then questions are forwarded to the appropriate support rep for manual reply.

**For instance**, if AAA Golf had their auto-response setting turned on, and if an answer from AAA Golf's FAQs had matched Jan's question, then when Jan submitted her question via the "Submit a Question" link, ezSupport would have sent Jan an auto-response email containing the matching answer like in the example shown at right. Jan's auto-response email would have a link to click if the auto-response answer didn't satisfy her. Clicking this link would immediately forward Jan's question to AAA Golf for a manual reply.

Auto response has the major benefits of immediately replying to customer questions and saving time for support reps who have fewer manual replies to send. These benefits should be weighed against the possibility of customers receiving replies that don't answer their question specifics.

**Auto response accuracy is highly dependent on building a complete FAQ knowledgebase with succinctly worded FAQs.**

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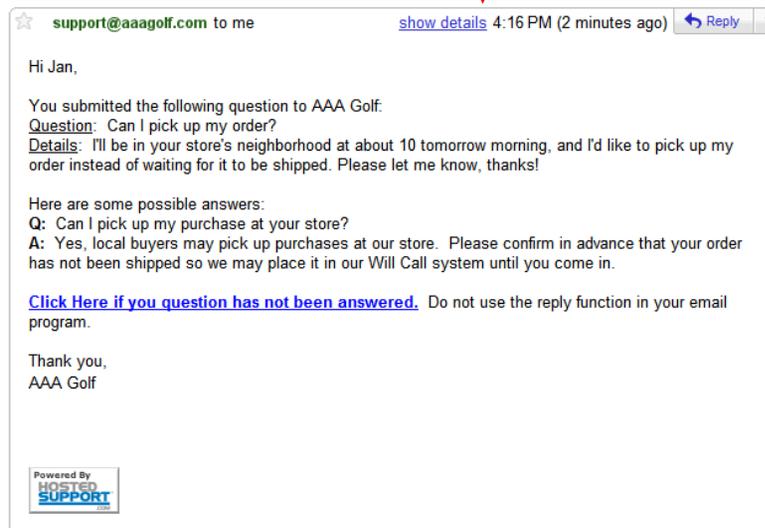
## Rep Gets a Question

① **Rep is alerted to Jan's question**

When Jan submits her question the rep responsible for the Shipping message category, **Danny**, immediately receives an email alert that he has a new question to answer.

Each support rep sees only the questions that have been assigned to him/her based on message category configurations. If a category has been assigned to a rep group, then all reps included in the group will be alerted to and see the category's questions until an individual rep takes assignment of a message.

Reps can always transfer messages to other reps as necessary. Reps can also create their own custom message folders and personalized signatures.

Admin and Manager level reps can always view messages assigned to other reps.

*Danny clicks the subject link to review Jan's question.*

| Support Center | Tools | Configuration | Company Profile | | View Your Help Desk |
|---|---|---|---|---|---|
| Summary | Messages | Tickets | Returns | Contact Manager | Calendar |

Keyword SEARCH [          ]   AND   ------- ALL -------   --------- ALL ----------   [?]   Submit

| ezSupport | POP Email | | | | | | | [?] |
|---|---|---|---|---|---|---|---|---|

Retrieve Messages

| Delete | Move | Forward | | | | 1 - 1 of 1 |
|---|---|---|---|---|---|---|

In-Box (1)
Archive (185)
Billing (3)
On Hold (8)
Sent (218)
Deleted (3) (purge)

Manage Folders
Signatures

| ☐ | # | Date Time | Name \| Account | Subject/Question | | Category | Priority | Group | CSR |
|---|---|---|---|---|---|---|---|---|---|
| ☐ | 1818 | 07/08/10 4:16 P | Brady , Jan | Can I pick up my order? | ① | Shipping | Medium | | D. Alavarado |

**Rep Answers the Question**

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② **Danny answers Jan's question**

The response screen for Jan's question displays Jan's question information in the History/Notes area and has an HTML/text editor for Danny to compose his answer.

A question reply template is pre-filled in the HTML/text editor so all Danny has to do is enter his answer.  The template for question replies can be updated in ezSupport under Configuration > Message Settings > Message Templates.

Danny can manually type in his answer to Jan, or if his response is one that he commonly uses in similar situations he can use a Saved Response to quickly insert a "canned" answer.  To do this, Danny clicks the Choose Saved Response button to view and select an appropriate response which will be inserted wherever the ::Response:: variable is located in the question reply template.  Saved Responses are managed under Configuration > Knowledgebase > Saved Responses.

If Danny thinks that Jan's question is being frequently asked by customers, he can add the question to AAA Golf's FAQs by checking the "Add to FAQ" box.  When Danny clicks the Send button, he will then be able to edit the new FAQ before it is added to the live FAQ knowledgebase.

Danny can also determine which message folder to save Jan's message in using the "Save in" drop box. Jan's original message and Danny's reply will be saved together as one message record.  And any further correspondence from this message will also be saved with the same message record.

*Danny completes his answer and clicks the Send button.*

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## Customer Receives Answer

① **Jan receives Danny's answer**

Danny's answer is immediately emailed to Jan, and Jan is impressed that AAA Golf has answered her question so quickly.  That other golf retailer she's done business with has always taken much longer to answer her questions.

Jan is pleased that AAA Golf will have her order available for pick up and wants to let Danny know that she'll get to the store between 10:30 and 11:00 the next morning.

*So Jan clicks the reply link in her email.*

② **Jan replies to Danny**

AAA Golf's help desk then pops up with a form for Jan to enter her response to Danny.  The complete history of Jan's question also displays for Jan's convenience.

*Jan enters her reply and clicks the Send button.*

## Rep Archives the Question

### Danny archives Jan's question

Danny receives Jan's reply, and arranges to have Jan's order ready to be picked up the next morning.

With all necessary steps taken to answer Jan's question, *Danny moves Jan's question into his "Archive" message folder,* and the question is completed.

If Jan hadn't replied, then Danny's response would have remained archived in his Sent folder.

### Archiving or Deleting Messages

Jan's archived message along with its complete history thread will be attached to Jan's ezSupport contact record where it can be viewed under the "Messages" tab.  Jan automatically created her contact record when she initially submitted her question.  Jan's contact record is keyed to her email address, and all future correspondence with Jan will be saved to her record.

Unlike some other support records such as problem or return tickets, question messages can be permanently deleted from ezSupport and customer contact records.  So if Danny ever deletes Jan's message and then purges his Deleted folder, Jan's message will be permanently deleted from the system.  AAA Golf has the option to only give Manager and Admin level reps deletion permission under Configuration > System Settings > System Options.

## And that's how ezSupport Messaging works!