

The logo for OneDesk is displayed in a stylized font. The word "One" is in a bright green color, and "Desk" is in white with a black outline. The logo is positioned on the left side of a horizontal grey band. To the right of the logo, several interlocking gears are shown. One gear in the foreground is a vibrant green, while the others are light grey. The gears are arranged in a way that suggests a complex, interconnected system.

OneDesk

Getting Started

OneDesk is a suite of blended applications that includes social media monitoring, customer engagement, customer feedback management, social collaboration, customer service/help desk, case management, project portfolio management and requirements management.

This quick-start guide will help you set up your OneDesk account. Simply follow each step, and you will be all set to use OneDesk.

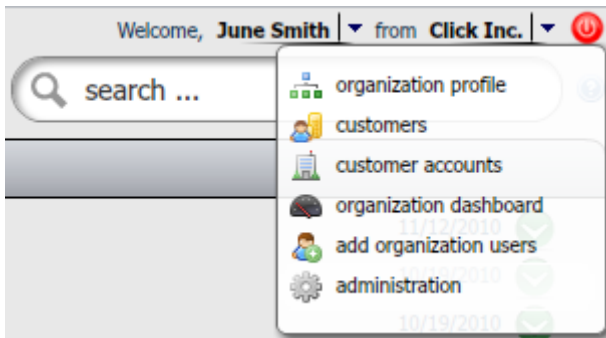
Let's get started!

1. Site Administration

Define users and their roles/permissions. Enter your organization strategies and specific fields. Make it easier for your customers, colleagues, and partners to interact and collaborate with you and provide feedback.

How to do this:

- a. Go to the **Organization menu** – select the drop-down arrow at the top-right corner, next to your organization name. Click on **administration**.



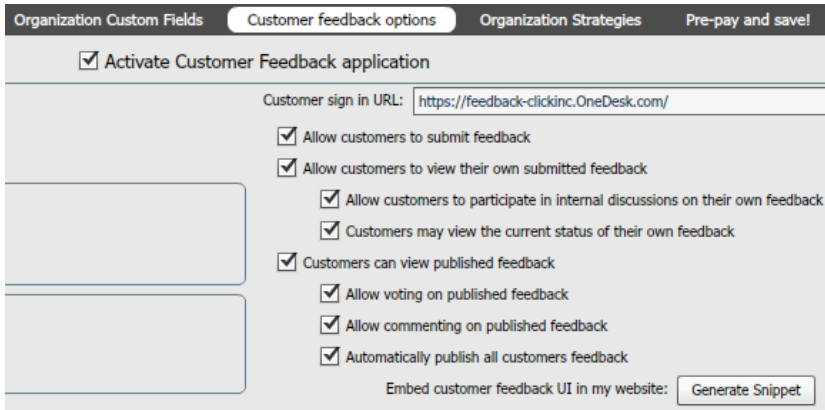
- b. Under **Organization Users/Roles**, add users and assign/create their roles. Users are employees and team members you wish to collaborate with. By assigning them a role, you are defining what they have access to and hence enforcing security.
- c. Set **organization preferences**. Set your organization's currency type, the direct URL your team and customers can use to sign-in to their accounts, and upload your company's logo. Note that some of these features are only available for Pro account users.
- d. Create any **custom fields** your organization will need to get started. Custom fields allow you to add properties to feedback, requirements, or tasks to help classify and organize a particular item. For example, you may create a custom field that asks your customers what category their feedback falls into: website related, pricing related, feature suggestion, defect, etc. You can also use custom fields to define specific products or services.
- e. Enter your **organization strategies**. These are goals you set for your organization, or the corporate strategies you will devise to ensure that your goals are met. This feature allows you to drive value to enterprise initiatives by making it easier to visualize how your business strategies and goals are affecting your product or service requirements and tasks.

2. Set customer feedback options

Set preferences for the customer portal and the feedback you receive from customers. Control what your customers can view and access by simply checking a few boxes. You can even embed the portal in your website.

How to do this:

- a. Check the box next to **Activate Customer Feedback application** to ensure the customer portal is activated so that you can immediately receive feedback.



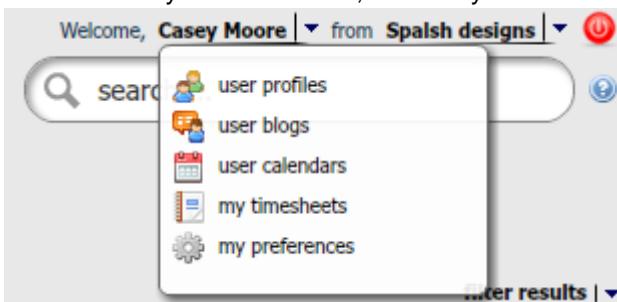
- b. Choose whether your customers can edit their own profiles, self-register, view feedback anonymously, view feedback submitted by other customers, participate in internal discussions about their own feedback, vote on feedback, and more.
- c. You may embed the portal in your website by clicking on Generate Snippet, and using the code to embed an iframe in your website.

3. Set up Social Media Monitoring and Customer Engagement

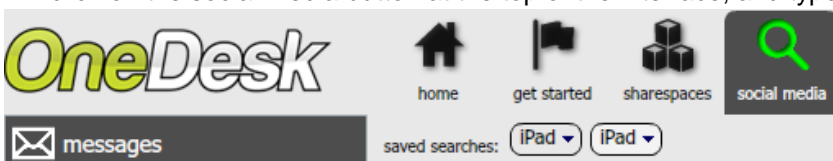
With OneDesk's social media monitoring tool, you can tune in to the social web to find out what your customers are thinking. Join the conversation, discover the 'buzz', and take action on the results. Find out what customers are saying about your products and services. Social media monitoring also allows you to engage with your customers and work with them to develop stellar products and services.

How to do this:

- a. **Link your social media accounts to OneDesk.** By linking your Facebook, Twitter, or LinkedIn accounts to OneDesk, you will be able to reply to social media search results from the social media channel in question. For example, if a customer Tweets something about your brand, product, or service you can use OneDesk's social media monitoring tool to find out what they said. You can then reply from within OneDesk and the response will show up on Twitter. Simply go to the **personal menu**, which can be accessed by clicking the drop-down arrow next to your name at the top-right of the interface. Select **user profiles**, and you will be able to add all your information, and link your social media accounts.

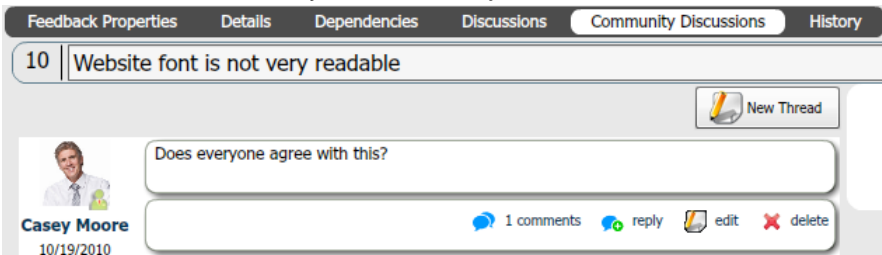


- b. Engage with customers by searching for your brand using the social media tool and replying to them. Simply click on the social media button at the top of the interface, and type your keywords in the search bar.



- c. You can also engage with your customers by collaborating with them through OneDesk's **community discussion** forums. Here, the whole customer base can join the conversation and discuss ideas and feedback

with each other. You and your team can join in and drill down into the details about what they are looking for.



You can also start a one-on-one **discussion** about a feedback, requirement, or task with a specific customer. Simply select the item you wish to discuss in their respective grids, and go to the discussion or community discussion tab below the grid.

4. Create Sharespaces

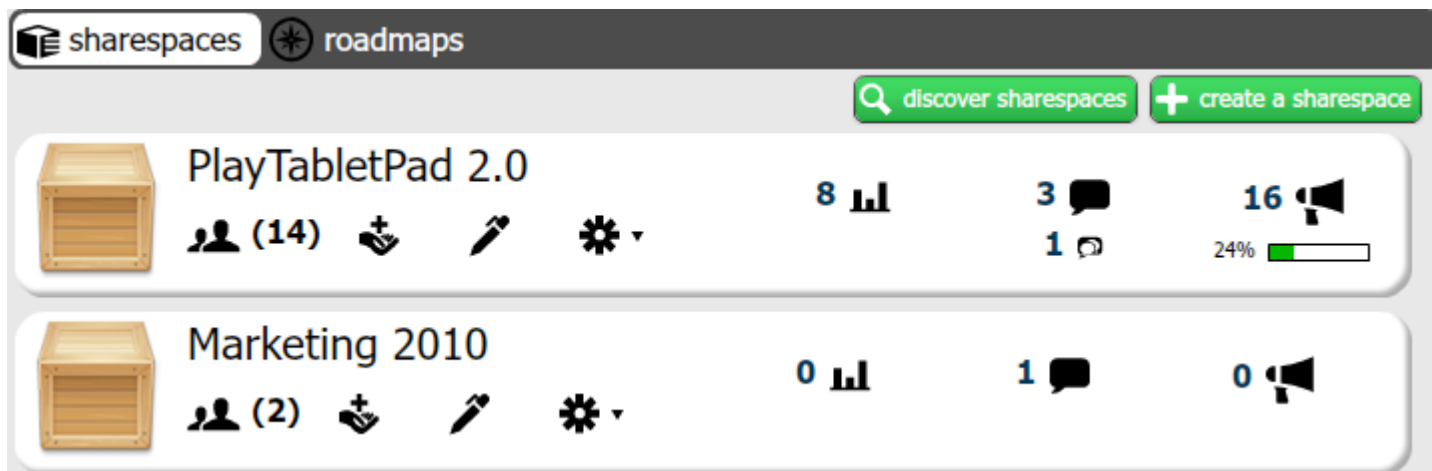
A Sharespace is where you and other team members will collaborate to work on projects.

How to do this:

- a. Click on the sharespaces button at the top of the interface.



- b. Click on **create a sharespace**.

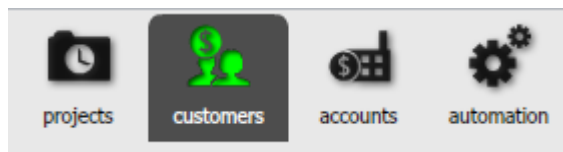


5. Import customers and customer accounts.

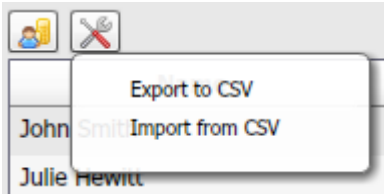
Import a customer list from a .csv file, and invite them to register. Once they do, they can provide feedback to your company at any time via the customer portal. You can also import information about your customer's companies and keep track of them.

How to do this:

- a. Click on the **customers** or the **accounts** buttons at the top of the interface.



- b. Click on the project tools button, and select import from CSV



Your customers/customer accounts information will appear in their respective grids. Note that you can also manually enter customers or customer accounts

6. Set-up project resources

For project management purposes, you need to set up resources. Resources could be the people you would need to pay, or the things you would need to pay for to get a task done. Simply enter the resources, along with how much they cost. This helps track how much your organization is spending for each task.

How to do this:

Go to the **tasks** tab in the sharespace you wish to create resources in. Go to **Project Resources**. From there, click on **create resource**.

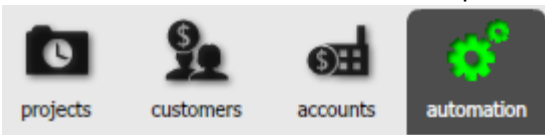
Resource Name	Cost per m...	RBS Code
MAPI interface	0.0% compl...	
Brad Collins	\$0.00	BRAD COLLINS
June Smith	\$0.00	JUNE SMITH
Analyse problem durations	100.0% com...	
Evaluate alignment to corporat...	100.0% com...	
Identifying product need	100.0% com...	
Identify companies with similar...	100.0% com...	
John Silver	\$25.00	JOHN SILVER
Joanna Adams	\$0.00	JOANNA ADAMS
Jenn Marks	\$10.00	JENN MARKS
Mark Johnston	\$0.00	MARK JOHNSTON
Cost resource		
Truck	\$50.00	TRUCK
Machine	\$100.00	MACHINE
Generic work resource		
Marketing staff	\$15.00	MARKETING STAFF

7. Set automation rules

The automation engine helps reduce manual data entry and create process efficiencies by allowing users to pre-set tasks to automate and streamline workflow. Set up automatic notifications, prioritize, and assign tasks to team members across your organization. Manage customer service and help desk workflow and optionally define automations to send emails to customers and staff for you.

How to do this:

- a. Click on the automation button at the top of the interface.



- b. Choose the type of automation you wish to set up, and create it.
- A **trigger** is a type of automation process that you can use to assign automated actions to any item based on conditions. For example, triggers are a great way to keep customers updated on an item's progress.

- **Scheduled job** automations can be created for items that already exist. This is useful in cases where you would want to set up a recurring action. You may have the system perform that action every hour, 6 hours, or 24 hours. Scheduled jobs are useful when it comes to ensuring that service level agreements (SLA) are met.
- A **new item workflow** is a type of automation process in which you set the system to perform automated actions on new items. For example, you can choose to automatically reply to social media. Whenever someone Tweets, Facebooks, mentions you in a blog or blog comment, the automation system will send a response from your social media accounts.
- You can also set up **macros**, for one-time automations.

8. Set your requirements analysis weightings

OneDesk's requirements analysis tools provide you with useful information and rankings you can refer to in order to help make decisions about which requirements to implement.

To be successful with limited resources, you must choose the right requirements to implement. OneDesk allows you to create product and service delivery plans that represent the ideal cost-benefit compromise thus helping you visualize and prioritize your requirements across several metrics. See which requirements would satisfy the most customers, help you meet your business goals, are the most popular, or the most cost-effective.

How to do this:

Go to the sharespace in question, then go to the **requirements** tab. Go to the requirements analysis tab and click on **set analysis weightings**.

