

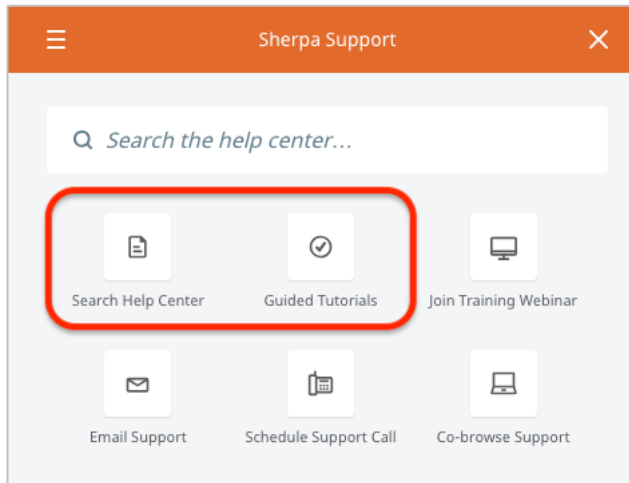


## TOOLS FOR CUSTOMER SUPPORT

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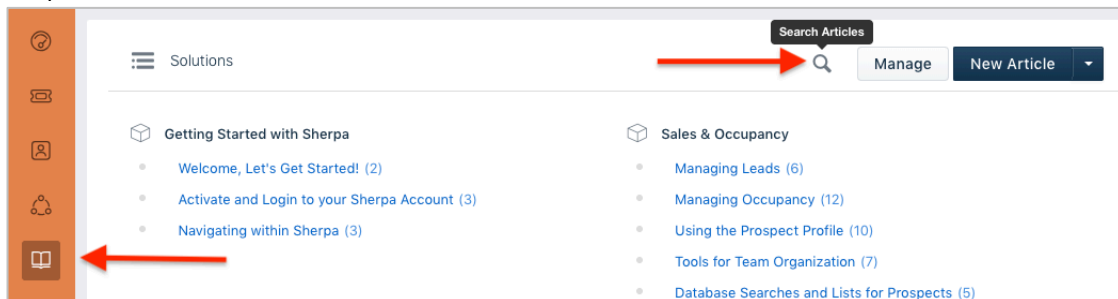
## HELP CENTER & GUIDED TUTORIALS

- Direct customers to the [Sherpa Support Portal](#) for “Help Center” articles and “Guided Tutorials”.
- Note: you can copy and paste sections of any help center article to your email communication and the formatting will transfer. You can also do the same into a Word doc to save/create PDFs.

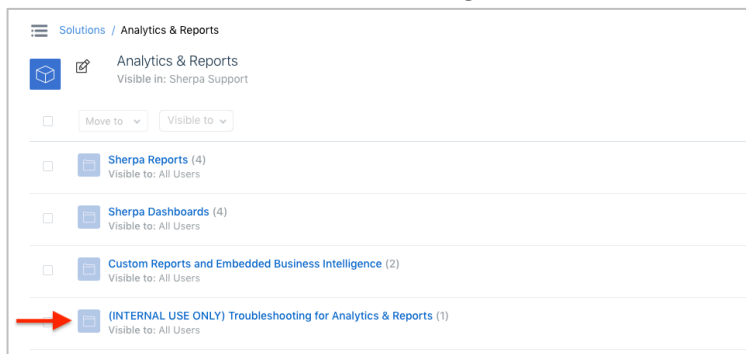


## INTERNAL TROUBLESHOOTING ARTICLES

- Within [Freshdesk](#), go to “Solutions” and use the keyword search to reference all help center and internal troubleshooting articles.

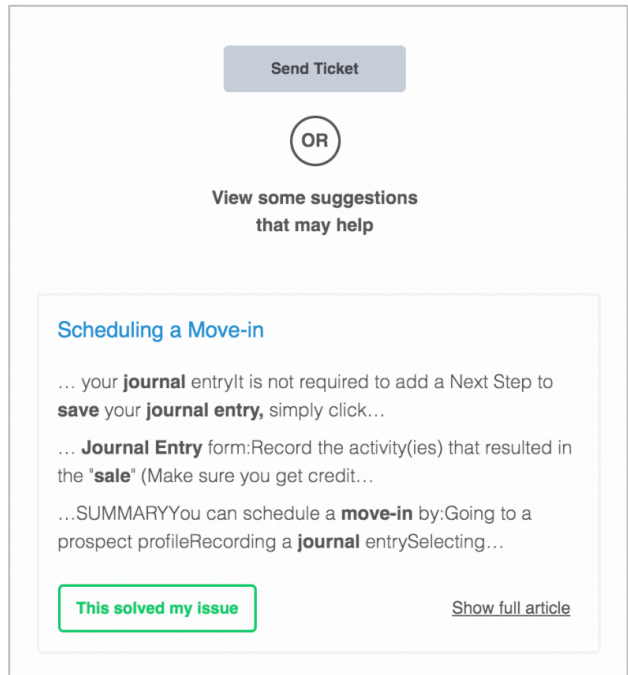
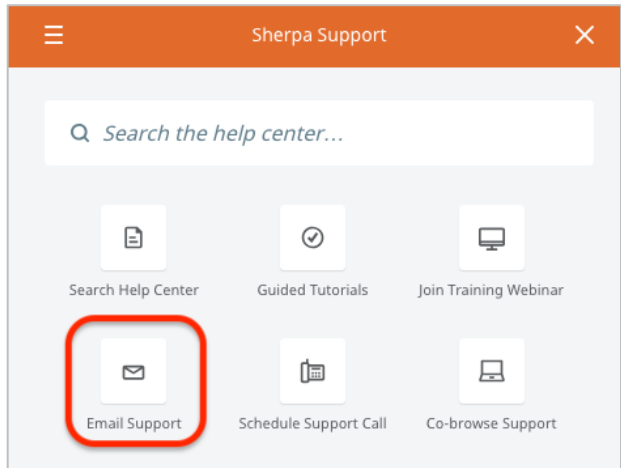


- Each Solutions category has a “Troubleshooting” folder that we can all use to add/edit internal troubleshooting articles for our use.

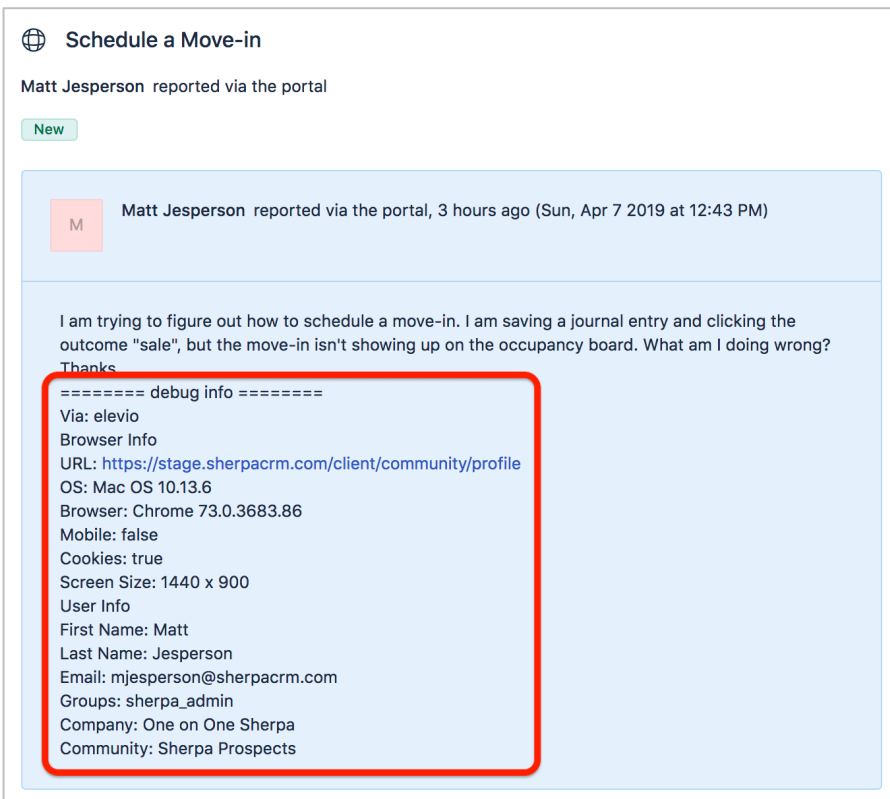


# EMAIL SUPPORT

- Direct customers to the **Sherpa Support Portal** to use the "Email Support" form. This form will perform a keyword search against all support articles and suggest possible solutions.

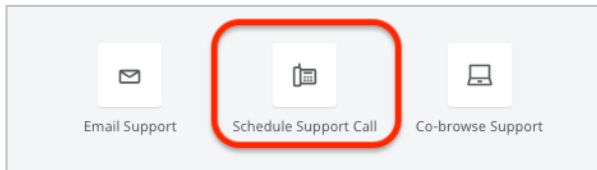


- If the user chooses to send the support email, this form will scrape user, browser and computer information for each email ticket. This information is appended to the bottom of the ticket in **Freshdesk**.



# SCHEDULE SUPPORT CALL

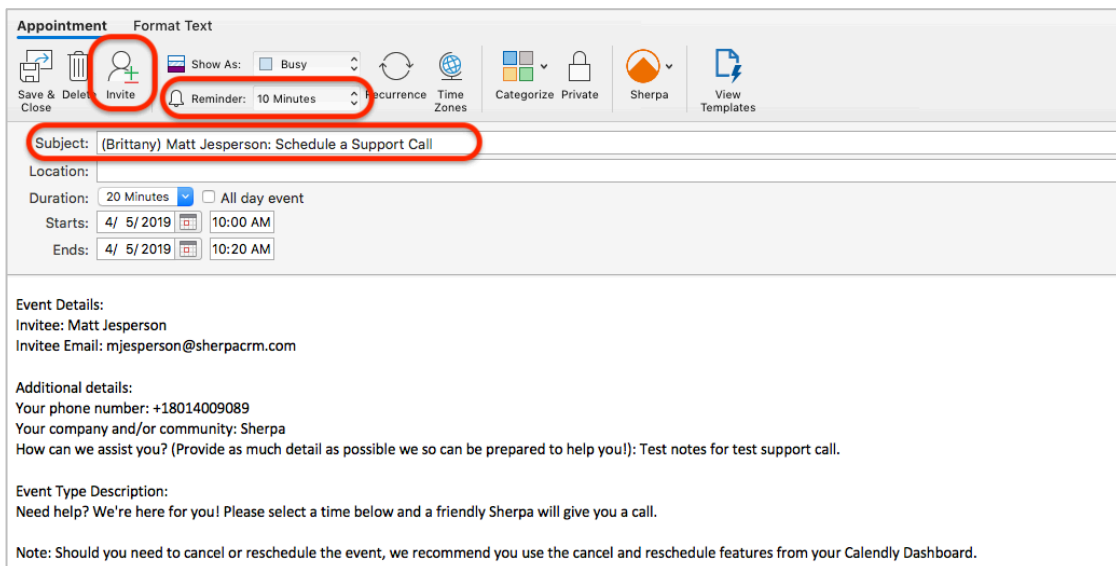
- Direct customers to the **Sherpa Support Portal** to use the "Schedule Support Call" form.



- When a call is scheduled on our support calendar, a support ticket will appear in **Freshdesk**. Freshdesk will auto-assign the ticket to a team member. This team member is responsible for this support call.

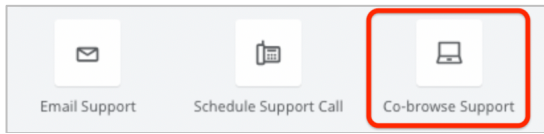


- This team member then goes to **Outlook > Sherpa Support** shared calendar and updates the calendar event with the following:
  - Add name to event (so others know the call is properly assigned)
  - Add a reminder
  - You can also invite yourself to the event, so it appears on your Outlook calendar in addition to the Sherpa Support calendar

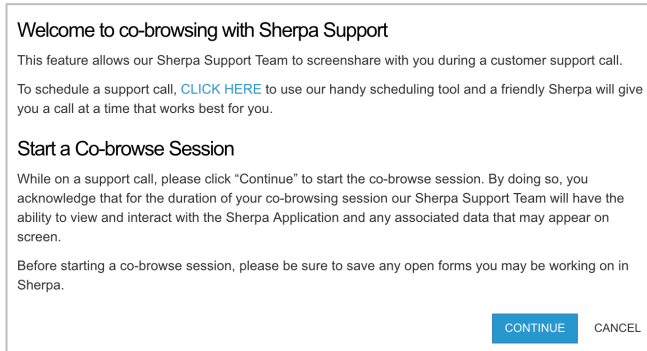


# CO-BROWSE SUPPORT

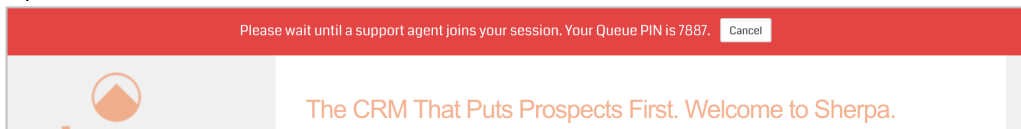
- Direct customers to the **Sherpa Support Portal** to use the “Co-browse Support” feature.



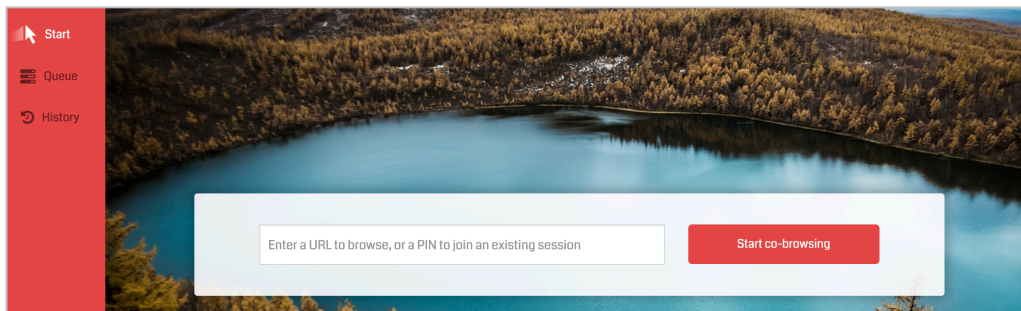
- Upon clicking the “Co-browse Support” button, the user is asked to confirm the request.



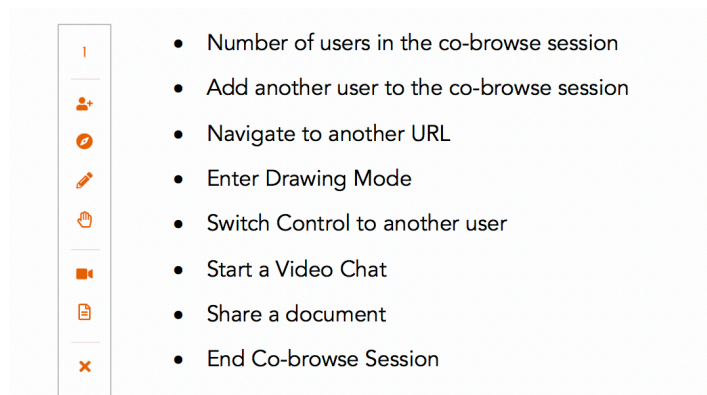
- Upon confirmation, the user is forwarded to the co-browsing screen with a Queue PIN.



- Receive the Queue PIN from the user during a customer support call and enter it into Surfly.com to begin the co-browse session.

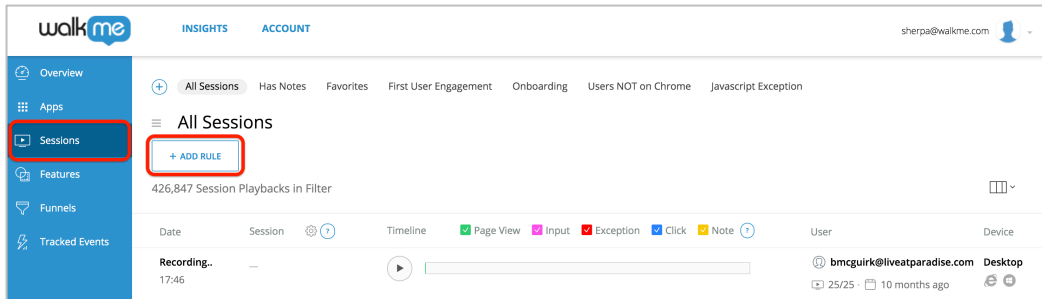


- When a Co-browse session begins, you’ll see the control toolbar on the right side of the screen. These features include:

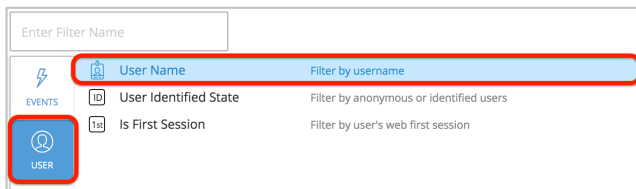


# WALKME VISIONS

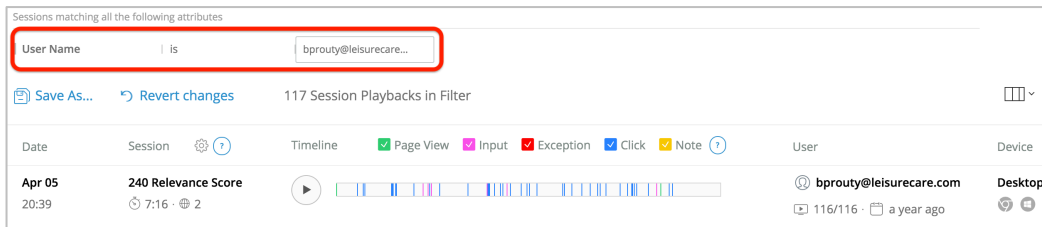
- To further untangle issues from a user perspective, you can use **WalkMe Visions** to view html recreations of a user session.



- To filter sessions, click "Add Rule" and select User > User Name



- Select "user name" > "is", then add the user email



- Select the desired session and use the on-screen tools to advance through the session to view workflow behavior.

