

G-Cloud 15 – Cloudset for Zendesk

G-Cloud 15 – Service Definition

Flowset	2
Use Cases	2
How to install	3
Formset	5
Use Cases	5
How to install	6
Performset	8
How to install	9
Contact Information	10

Flowset

Design and enact advanced workflows right inside Zendesk using Flowset, a unique visual non-code WORKFLOW ENGINE.

Dynamically guide agents to help them work quicker, more accurately, and be more empowered to resolve tickets:

Guide agents using a workflow engine to streamline and improve ticket handling performance.

Embed processes directly at the point of need to solve accuracy, quality, and compliance issues.

Help agents using contextualisation to gain focus, confidence, and clarity.

Amplify Zendesk for greater agility, productivity, accountability, and innovation:

Systemise processes to increase productivity, quality, consistency, compliance, and quicker agent onboarding.

Adopt better design and management practices with no-code tools to improve agility and scalability.

Add advanced workflow capabilities to fill functional gaps and foster innovation.

Use Cases

Flowset can be used in a wide variety of use cases, covering both Customer Service and Employee Service, particularly where more richness, sophistication, and whole ticket lifecycle management are needed – using just one app:

- Customer Services – Complaint handling, Technical support (triage and escalation), Troubleshooting diagnostics, Customer Onboarding, Facilities management, Billing and payments, Account management, etc.
- Employee Services – Employee onboarding and offboarding, Change management, Facilities management, Service requests, Incident reports, Authorisation and access requests, Policy clarifications, etc.

How to install

The following guidelines help you proceed with the 30 Day FREE trial and implementing this App:

- After initiating the Zendesk App Marketplace free trial, select the app icon to give access to our embedded Cloudset Framework. This will start the Zendesk secure OAuth authentication request, based on the currently logged in admin user.
 - A choice of Cloudset Datacenter will be offered, either US or EU (Ireland). This choice is a one-time selection decision.
 - This authentication can be revoked at any time by the admin user who installed the app, by selecting the user account security tab. API access is needed to enable the configuration tool to read and write app configuration data to the app installed on Zendesk.
 - Once completed, a billing details screen will be presented to capture invoicing address details. Invoice history and records can be accessed and downloaded after that.
 - If Zendesk security Restricted IP has been set-up, details can be obtained from the Cloudset Framework Zendesk(s) tab, together with a Forget Token method to support changing the admin user account.
 - Once the extended registration has been completed, you will be able to use the app configuration tool to get started.
 - You will have 30 days to evaluate the app. At any time during the trial, uninstall the app to cancel the trial. This will automatically ensure that your credit card won't be charged.
 - After 30 days your first payment will be taken in advance. This will automatically renew every month until you uninstall the app.
 - The monthly invoice will be charged on the basis of how many agents you have and how the agent count profile changed.
-
- A Cloudset Framework account is created for all new customers, providing a hub for all Cloudset purchased apps, enabling access to Zendesk Guide integration services, and billing management.
 - Security and API Access UseThe Cloudset Framework, specifically the configuration tools, require API access to your Zendesk, via Zendesk's secure

OAuth mechanism. This is revocable at any time from the Zendesk admin account used to install the app, via the user security setting tab.

- Flowset only persistently stores outside of Zendesk, Field ID's, Field Option Value ID's, Group ID's Form ID's, and Brand ID's, along with the admin account holder email and granted OAuth token. Transmission of this data is over https, and all data stored is encrypted at rest. The only other use of the REST API is to look-up ID values to display in the configuration tool.
- Security management is governed by Cloudset SOC2 Type 2 compliance provisions.

Formset

Design dynamically adaptable forms right inside Zendesk using Formset, a unique visual non-code FIELDS RULES ENGINE.

Adapt forms dynamically to their context to make them more relevant, less ambiguous, and quicker to complete:

- Guide field selections using a rules engine to streamline and speed up workflow processes.
- Eliminate illogical field and field option value combinations to ensure data accuracy and clarity.
- Enforce granular controlled mandatory fields to improve ticket handling performance.
- Simplify Zendesk configuration to increase scope, agility, and business efficiency:
-
- Improve aggregated data management to solve reporting challenges and make more informed business decisions.
- Implement field rules in Tickets, Organisations, and User locations to cover more needs.
- Minimise agent onboarding time to reduce costs and avoid negative impacts.

Use Cases

Formset can be used in a wide variety of use cases, covering:

- Supporting extensive ranges and volumes of software and hardware product types and their hierarchies
- Dynamically filtering ticket resolution types based on product or ticket categories
- Accommodating global company territory variations
- Managing data fields related to agent group membership
- Decluttering interfaces by removing irrelevant data fields and field option values

- Segmenting Zendesk fields for different business groups and processes
- Managing redundant data values that must be retained structurally but withdrawn from operational use

How to install

The following guidelines help you proceed with the 30 Day FREE trial and implementing this App:

- After initiating the Zendesk App Marketplace free trial, select the app icon to give access to our embedded Cloudset Framework. This will start the Zendesk secure OAuth authentication request, based on the currently logged in admin user.
- A choice of Cloudset Datacenter will be offered, either US or EU (Ireland). This choice is a one-time selection decision.
- This authentication can be revoked at any time by the admin user who installed the app, by selecting the user account security tab. API access is needed to enable the configuration tool to read and write app configuration data to the app installed on Zendesk.
- Once completed, a billing details screen will be presented to capture invoicing address details. Invoice history and records can be accessed and downloaded after that.
- If Zendesk security Restricted IP has been set-up, details can be obtained from the Cloudset Framework Zendesk(s) tab, together with a Forget Token method to support changing the admin user account.
- Once the extended registration has been completed, you will be able to use the app configuration tool to get started.
- You will have 30 days to evaluate the app. At any time during the trial, uninstall the app to cancel the trial. This will automatically ensure that your credit card won't be charged.
- After 30 days your first payment will be taken in advance. This will automatically renew every month until you uninstall the app.
- The monthly invoice will be charged on the basis of how many agents you have and how the agent count profile changed.

- A Cloudset Framework account is created for all new customers, providing a hub for all Cloudset purchased apps, enabling access to Zendesk Guide integration services, and billing management.
- Security and API Access UseThe Cloudset Framework, specifically the configuration tools, require API access to your Zendesk, via Zendesk's secure OAuth mechanism. This is revocable at any time from the Zendesk admin account used to install the app, via the user security setting tab.
- Formset only persistently stores outside of Zendesk, Field ID's, Field Option Value ID's, Group ID's Form ID's, and Brand ID's, along with the admin account holder email and granted OAuth token. Transmission of this data is over https, and all data stored is encrypted at rest. The only other use of the REST API is to look-up ID values to display in the configuration tool.
- Security management is governed by Cloudset SOC2 Type 2 compliance provisions.

Performset

Performset is an advanced SLA | OLA Management paid app and web service requiring onboarding consulting support from the Cloudset family of extension products for Zendesk.

- Keep your promises with sophisticated and proactive SLA | OLA metrics and measurements.
- Step outside of fitting into limited and fixed models and implement your SLA's and OLA's precisely as you need for your business. Key features include:
 - Standard and custom SLA metrics
 - Multiple work time schedules
 - Flexible triggering and satisfaction rules
 - Arbitrary starts and stops to support escalations
 - Flexible metrics clock pausing and solve continuation
 - Fuzzy end-of-next-day metrics
- A unique SLA Assistant surfaces the metric target times, policy, and schedule making them highly visible. Together with operational progress reporting, it provides a full context to support proactive management.
- Complete with a real-time SLA Dashboard. See the giant picture or just the right segmentation to make next-up or informed decisions.
- Real-time notification for pre-breach and breach points down to a granularity of one minute. Never miss an opportunity to prevent an SLA violation.

The benefits of the Performset include:

- Performance compliance
- Where applicable save penalty costs for breaching SLA's
- Improved decision making at a per ticket and aggregated viewpoint
- Support a wide range of use of SLA | OLA policies
- Seamlessly integrate into the Zendesk UX and UI
- A Cloudset Framework account is created for all new customers, providing a hub for all Cloudset purchased apps, enabling access to Zendesk Guide integration services, and billing management.

- Note: The Cloudset Framework, specifically the configuration tools, requires API access to your Zendesk via Zendesk's secure OAuth mechanism. Revocable at any time.

How to install

The following guidelines are provided to help you proceed with the 30 Day FREE Trial and implementing this App:

Note: Installation on a Zendesk sandbox is very similar, although billing details will not be collected as the App is free of charge forever.

- After initiating the Zendesk App Marketplace free trial, we recommend that you accept the native app configuration settings defaults. Use the Inline Manual provided with the Cloudset Framework to learn more about the settings available.
- Select the app icon to give access to our embedded Cloudset Framework. This will start the Zendesk secure OAuth authentication request, based on the currently logged in admin user.
- This authentication can be revoked at any time by that admin user who installed the app, by selecting the user account security tab. API access is needed to enable the configuration tool to read and write app configuration data to the app installed on Zendesk.
- Once completed, a billing details screen will be presented to capture invoicing address details. Invoice history and records can be after that accessed and downloaded.
- If Zendesk security Restricted IP has been set-up, details of which can be obtained from the CloudSET Framework Zendesk(s) tab, together with Forget Token method to support changing admin user account.
- Once the extended registration has been completed, you will be able to use the app configuration tool to get started.
- You will have 30 days to evaluate the app. At any time during the trial, uninstall the app to cancel the trial. This will automatically ensure that your credit card won't be charged.
- After 30 days your first payment in advance will be taken. This will automatically renew every month until you uninstall the app.

- The monthly invoice will be charged on the basis of how many agents you have and how the agent count profile changed.
- For any issues or questions – raise a ticket with support@cloudset.net
- Note: If other Cloudset apps are subsequently purchased, neither the OAuth Authentication, billing address details, nor Help Center integration steps are required as these are centrally managed with the one Cloudset Account which is automatically created on the first app purchase and install.

Contact Information

Netpremacy Public Sector Team

publicsector@netpremacy.com

Call: +44 1420 481450