



# Product Update Webinar

# Who are we?



 Tom Knippenberg  
Product Manager



 Esther de Winter  
Product Manager



Stefan van Opstal  
Product Manager



# Agenda for today

- TOPdesk's vision
- Demo of new & upcoming features
- Overview: what's next?
- Finding more information



**We'll email you an overview tomorrow**





# TOPdesk's vision; the faster way to Service Excellence

“Guide organizations to achieve service excellence by getting people engaged, empowering them to work better together”



**Vision**  
Where we want to be

**Themes**  
How to get there

**Next up**

**In progress**

**Done**

**Projects**  
One step at a time



# The features we'll demo today:

- Asset Management
- Public knowledge items
- Chat
- Share & Subscribe
- Collaboration platform
- Artificial intelligence
- Workflows
- Mobile



# Do-it-yourself imports Azure AD and Assets

**What:** Customer-facing import wizard for Assets and Azure AD

**Why:** Improving self-reliance for creating and adjusting imports



# Asset Management imports Imports

New import Copy Delete Refresh

Navigator Save Refresh

Overview

- Functional Settings
- Module Settings
- SaaS Settings
- Import Settings
  - Mail import
  - Standard imports
  - Customized imports
  - Asset Management imports
    - Imports
    - History
  - Person imports
    - Imports
    - History

No imports found

Do-it-yourself imports Azure AD and Assets



File Home Insert Page Layout Formulas Data Review View Developer Add-ins Help Team Tell me what you want to do

Share Comments

Clipboard: Paste, Cut, Copy, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Percentage, Decimals

Styles: Conditional Formatting, Format as Table, Cell Styles

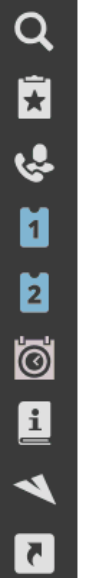
Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

G11

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	name	License Plate	Brand	Purchase date	Purchase price												
2	CAR001	SV-HB-66	Alfa Romeo	2-2-2019	€ 40.000												
3	CAR002	SV-HB-67	Audi	3-2-2019	€ 80.000												
4	CAR003	BE-HA-23	BMW	4-2-2019	€ 60.000												
5	CAR004	XY-ZJ-23	Volkswagen	5-2-2019	€ 50.000												
6	CAR005	BHV-AJ-3	Alfa Romeo	6-2-2019	€ 40.000												
7	CAR006	23-23-AH	Audi	7-2-2019	€ 80.000												
8	CAR007	QO-ZJ-49	BMW	8-2-2019	€ 60.000												
9	CAR008	SV-HB-66	Volkswagen		€ 50.000												
10	CAR009	SV-HB-67	Alfa Romeo		€ 40.000												
11	CAR010	BE-HA-23	Renault		€ 34.000												
12	CAR011	XY-ZJ-23	BMW		€ 60.000												
13	CAR012	BHV-AJ-3	Volkswagen		€ 50.000												
14	CAR013	23-23-AH	Alfa Romeo		€ 40.000												
15	CAR014	QO-ZJ-49	Peugeot		€ 24.000												
16	CAR015	SV-HB-66	BMW		€ 60.000												
17	CAR016	SV-HB-67	Volkswagen		€ 50.000												
18																	
19																	
20																	
21																	

Do-it-yourself imports Azure AD and Assets



# Asset import

# Auto import manual



## Import summary

- ✓ 1. Target
- ▶ 2. Source
- ⌚ 3. Field mapping
- ⌚ 4. Import settings
- ⌚ 5. Scheduling
- ⌚ 6. Preview

## 2. Source

Select the file you wish to import from (Microsoft Excel or CSV)

Use the 'Download xlsx template' button to obtain a correctly formatted source file.

Download xlsx template

Select a file  
or drop one here

Previously uploaded files:

Select file to use ▼

Time zone for dates in Excel (cells formatted as Date only):

(GMT +01:00) Europe/Berlin ▼

### Filter on source data (optional)

No filter rules added yet

+ Add filter rule

# Do-it-yourself imports Azure AD and Assets

Give us feedback!

< Previous step

Save progress

Next step >



# Asset import Auto import manual



Import summary

- 1. Target
- 2. Source
- 3. Field mapping**
- 4. Import settings
- 5. Scheduling
- 6. Preview

## 3. Field mapping

### Fields from source:

Brand

### Mapped fields:

License Plate	»	License Plate (kenteken)	
name	»	Asset ID (name)*	
Purchase date	»	Purchase date (aanschafdatum)	
Purchase price	»	Purchase price (aanschafwaarde)	

Do-it-yourself imports Azure AD and Assets

Give us feedback!

Previous step

Save progress

Next step



Asset import

Auto import manual



Import summary

- ✓ 1. Target
- ✓ 2. Source
- ✓ 3. Field mapping
- ▶ 4. Import settings
- ⋮
- ✓ 5. Scheduling
- ⌂ 6. Preview

## 4. Import settings

Which TOPdesk field do you want to use as the unique key:

Do-it-yourself imports Azure AD and Assets

Give us feedback!

< Previous step

Save progress

Next step >

# Asset import Auto import manual



## Import summary

- ✓ 1. Target
- ✓ 2. Source
- ✓ 3. Field mapping
- ✓ 4. Import settings
- ✓ 5. Scheduling
- ▶ 6. Preview

## 6. Preview

▶ Assets to be created (14)

▶ Assets to be updated (0)

▼ Errors (2)

The records below cannot be imported and will be skipped. To import these records, correct the data in your source file.

Asset ID	Source field	Target field	Error
CAR010	Brand	Brand	Unrecognized value: Renault
CAR014	Brand	Brand	Unrecognized value: Peugeot

Do-it-yourself imports Azure AD and Assets

Give us feedback!

◀ Previous step

Save progress

Save and run

# Person imports Imports

New import Copy Delete Refresh

Navigator Save Refresh

Overview

- ▶ Functional Settings
- ▶ Module Settings
- ▶ SaaS Settings
- ▼ Import Settings
  - ✉ Mail import
  - 📄 Standard imports
  - 🔧 Customized imports
  - ▼ 📁 Asset Management imports
    - Imports
    - History
  - ▼ 👤 Person imports
    - Imports**
    - History

No imports found

Do-it-yourself imports Azure AD and Assets

# Do-it-yourself imports Azure AD and Assets

**Version:** Available on SaaS, aiming for Q2 on-premises

**More information:** [blog.topdesk.com/updates/importing-made-easy](https://blog.topdesk.com/updates/importing-made-easy)



# Import from local AD

**What:** Import persons from local AD in the import wizard

**Why:** Improving self-reliance

**Version:** Aiming for Q2 on SaaS, Q3 on-premises





# Actions for Asset Management

## Manual http requests

**What:** Manually triggering a series of http requests from an asset card

**Why:** Allowing to trigger integrations and first step towards emailing



# Modules New Asset Management

Edit organizational defaults

## Navigator

- Self-Service Portal
- Call Management
- Problem Management
- Change Management
- Project Management
- Visitor Registration
- Operations Management
- Reservations Management
- Item Management
- Asset Management
- New Asset Management** NEW
- Property Management
- Long-Term Planning
- Contract Management and SLM
- Survey Management
- Knowledge Management
- Plan Board
- Action Management
- Supporting Files

## New Asset Management

For greater customizability, try the new version of Asset Management.  
[Go to the asset overview](#) [Open the Asset Designer](#)



Actions for Asset Management – manual http requests

# Modules **New Asset Management**

Edit organizational defaults

## Navigator

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- Supporting Files

## New Asset Management

For greater customizability, try the new version of Asset Management.

[Go to the asset overview](#) [Open the Asset Designer](#)



**Actions for Asset Management – manual http requests**

# Actions for Asset Management

## Manual http requests

**Version:** Available on SaaS, aiming for Q2 on-premises



Coming up

# Actions for Asset Management

## Manual and automatic emails

**What:** Sending emails from Asset Management, both manually and automatically (e.g. license expires)

**Why:** Signalling users when something is up with their assets



## Automated action 3



When would you like to do something?






 

**Actions for Asset Management – manual and automatic emails**

## Automated action 3



What would you like to do?

- Send email 
- Create an incident 
- Fill field on another card 
- Generate a document 
- Advanced option 

Actions for Asset Management – manual and automatic emails

Coming up

# Actions for Asset Management Manual and automatic emails

**Version:** Q2 on SaaS, aiming for Q3 on-premises





# Permissions per asset type

**What:** Configure read/write permissions for Asset Management on a template level

**Why:** Different departments or operator groups shouldn't be able to see each other's assets



# Assets 7 of 7

[Share link](#)

[New](#) [Refresh](#) [Columns](#) [More](#)

**Find assets** ⏪

Type to search

**Overviews** 🗑️ 📄

All

**All assets**

Database + Extra

PreparserMappings

Vehicles

**Filter**

Archive

Active only | Archived only | All

[+ Add filter](#)

**Types**

All types

Auto

<input type="checkbox"/>	Asset ID	Type	Summary	Assignment	Modification date	Creation date
<input type="checkbox"/>	CAR001	Auto	SV-HB-66 Alfa Romeo		03-20-2019 02:48 pm	03-20-2019 02:48 pm
<input type="checkbox"/>	CAR002	Auto	SV-HB-67 Audi		03-20-2019 02:48 pm	03-20-2019 02:48 pm
<input type="checkbox"/>	CAR003	Auto	BE-HA-23 BMW		03-20-2019 02:48 pm	03-20-2019 02:48 pm
<input type="checkbox"/>	CAR004	Auto	XY-ZJ-23 Volkswagen		03-20-2019 02:48 pm	03-20-2019 02:48 pm
<input type="checkbox"/>	CAR005	Auto	BHV-AJ-3 Alfa Romeo		03-20-2019 02:48 pm	03-20-2019 02:48 pm
<input type="checkbox"/>	CAR006	Auto	23-23-AH Audi		03-20-2019 02:48 pm	03-20-2019 02:48 pm
<input type="checkbox"/>	CAR007	Auto	QO-ZJ-49 BMW		03-20-2019 02:48 pm	03-20-2019 02:48 pm

0 assets selected

End of results

## Permissions per asset type

Give us feedback!



# Permission Group **Limited assets**

Save ↻ Create ▾ More ▾

- GENERAL**
- OPERATORS (1)
- NOTES

## General

Name

## Authorization

Expand all

- ▶ Self-Service Portal
- ▶ Services
- ▶ Call Management
- ▶ Problem Management
- ▶ Change Management
- ▶ Change and Project Management
- ▶ Project Management
- ▶ Visitor Registration
- ▶ Operations Management
- ▶ Reservations Management
- ▶ Chat
- ▶ Item Management
- ▶ Configuration Management
- ▶ Long-Term Planning

Permissions per asset type

▶ Knowledge Base

# Assets

Share link

New Columns More

Find assets

Type to search

Overviews

All assets

- Database + Extra
- PreparserMappings
- Vehicles

Filter

Archive

Active only Archived only All

Add filter

Types

- All types
- Acces
- Auto
- Azure Subscription
- Azure WebApp

Asset ID	Type	Summary	Assignment	Modification date	Creation date
CAR001	Auto	SV-HB-66 Alfa Romeo		03-20-2019 02:48 pm	03-20-2019 02:48 pm
CAR002	Auto	SV-HB-67 Audi		03-20-2019 02:48 pm	03-20-2019 02:48 pm
CAR003	Auto	BE-HA-23 BMW		03-20-2019 02:48 pm	03-20-2019 02:48 pm
CAR004	Auto	XY-ZJ-23 Volkswagen		03-20-2019 02:48 pm	03-20-2019 02:48 pm
CAR005	Auto	BHV-AJ-3 Alfa Romeo		03-20-2019 02:48 pm	03-20-2019 02:48 pm
CAR006	Auto	23-23-AH Audi		03-20-2019 02:48 pm	03-20-2019 02:48 pm
CAR007	Auto	QO-ZJ-49 BMW		03-20-2019 02:48 pm	03-20-2019 02:48 pm

0 assets selected

End of results

## Permissions per asset type

Give us feedback!

# Permissions per asset type

**Version:** Available on SaaS and part of the Q1 on-premise release

**More information:** [blog.topdesk.com/updates/permissions-per-asset-type](https://blog.topdesk.com/updates/permissions-per-asset-type)



# Public knowledge items

**What:** Knowledge items that you can make available outside of TOPdesk

**Why:** Enabling shift-left by offering knowledge to users that don't have an account in TOPdesk





Explorer

- Startpagina
- Nieuws
- Mijn werkplek
- Example of embedded knowledge item
- Programma's en rechten
- Vergaderingen en bijeenkomsten
- Procedures Servicedesk
- Financiën en reizen
- Mijn informatie en contract
- TOPdesk informatie
- TOPzorg
- Server down
- [nog te vertalen]
- [nog te vertalen]
- Error 9090

# KI 0149 Example of embedded knowledge item

Save Refresh Translate Create More

GENERAL AVAILABILITY FLOWS NEWS INFORMATION LINKS DOCUMENT OVERVIEW

### Self-Service Portal

- Available in Self-Service Portal
- Not available in Self-Service Portal
- Available in Self-Service Portal for a certain period

### Public access

Publish as public web page (no login required)

### Branches

- Only available to Self-Service Portal users of linked branches
- Only available to operators of linked branches

### URL

Operator's Section <https://msp.topdesk.net/tas/secure/mango/knowledgebasebrowse?unid=10e0981a977f41a9970629c196334e83>

Self-Service Portal <https://msp.topdesk.net/tas/public/ssp/content/detail/knowledgeitem?unid=10e0981a977f41a9970629c196334e83>

Public access <https://msp.topdesk.net/solutions/open-knowledge-items/item/KI%200149/nl/>

FILTER: Active cards

Links Wizard Refresh More Settings

<input type="checkbox"/>	Name	Specification	Street (Visiting)	Number (Visiting)	Postcode (Visiting)	City (Visiting)	Country (Visiting)	State / County (Visiting)	Street (Post)	Number (Post)	Postcode (Post)	City (Post)	Country (Post)	State / County (Post)
<input type="checkbox"/>	TOPdesk Belgium		Uitbreidingsstraa	184	2600	Antwerpen	België		Uitbreidingsstraa	184	2600	Antwerpen	België	
<input type="checkbox"/>	TOPdesk Nederland	Hoofdkantoor	Westlandseweg	40	2624 AD	Delft	Nederland		Postbus	559	2600 AN	Delft	Nederland	

# Public knowledge items



Google Search

I'm Feeling Lucky

Google offered in: [Nederlands](#) [Frysk](#)

# Public knowledge items





## Better support, happy customers

Discover the power of  
simple service management  
software

Try the demo

## Excellent service management made easy

Happy customers are the goal of every supporting department. We understand. That's why we've created a solution that helps you improve customer communication, manage workflows and keep track of assets. But above all: our software is simple and attractive. This not only makes it pleasant to use, but also quick to adopt. You're looking to deliver excellent service from day one – and TOPdesk is here to help.



Feb 4, 2019

“We have been on TOPdesk for 10 years; the onboarding experience was great and I would guess it has only improved.”

Jay Hamel

Sr. Vice President & C.O.O.  
Information Technology and Services | 11-50 em...



[Read full review](#)

Place an iframe on  
any website





## Better support, happy customers

Discover the power of  
simple service management  
software

Try the demo

### Example of embedded knowledge item

KI 0149

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus a arcu pretium, venenatis augue sit amet, faucibus quam. Nullam sed ullamcorper orci, id elementum ligula. Nulla quis metus vitae enim varius vulputate et et ipsum. Nam vel ipsum nec risus lacinia hendrerit. Aenean vel ultricies eros. In sed pharetra tellus, ac vestibulum erat. Nunc ornare tellus quis magna gravida sagittis. Mauris sit amet dignissim mauris. Vivamus faucibus commodo lobortis. Curabitur nunc dui, pretium nec dictum egestas a massa. Aliquam erat volutpat. In a pharetra erat.



Feb 4, 2019

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any website



# Public knowledge items

**Version:** Available in Labs on SaaS, aiming for Q3 on-premises

**More information:** [blog.topdesk.com/updates/public-knowledge-items](https://blog.topdesk.com/updates/public-knowledge-items)



# Chat

**What:** A new TOPdesk module offering a native chat solution in TOPdesk





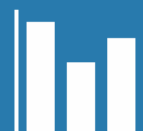

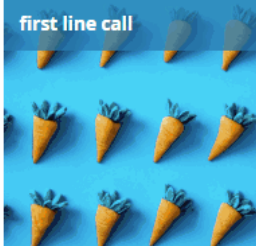





**Why:** Enabling customers to be reachable through multiple channels





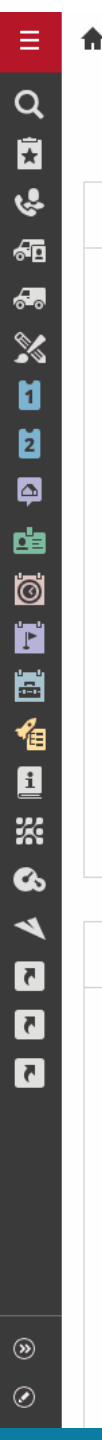
# OPEN

Steekwoorden gebruiken voor zoeken

<p><b>My Requests</b></p> 	<p><b>Nieuwe reservering 'Ruimtes'</b></p> 	<p><b>Mijn Werkplek</b></p> 	<p><b>Actuele storingen</b> <span>3</span></p> <p><b>Published major!</b> Dit is een testmajor</p> <p>This has a checklist.</p> <p><b>Autorisatie-overzicht openen</b> &gt;</p> <p><b>Nieuws</b> <span>1</span></p> <p><b>Welkom bij TOPdesk</b> TOPdesk helpt uw dienstverlening verbeteren. Of het nu gaat om uw IT-afde...</p>
<p><b>Contact &amp; Feedback</b></p> 	<p><b>Trend report of logged and resolved calls</b></p> 	<p><b>Nieuwe reservering middel</b></p> 	
<p><b>first line call</b></p> 	<p><b>Toegang tot Business Software</b></p> 	<p><b>Test CHRISF</b></p> 	
<p><b>augsburg rapp</b></p> 	<p><b>Kennisitem</b></p> 	<p><b>Mijn reserveringen</b></p> 	

Chat

Start a chat

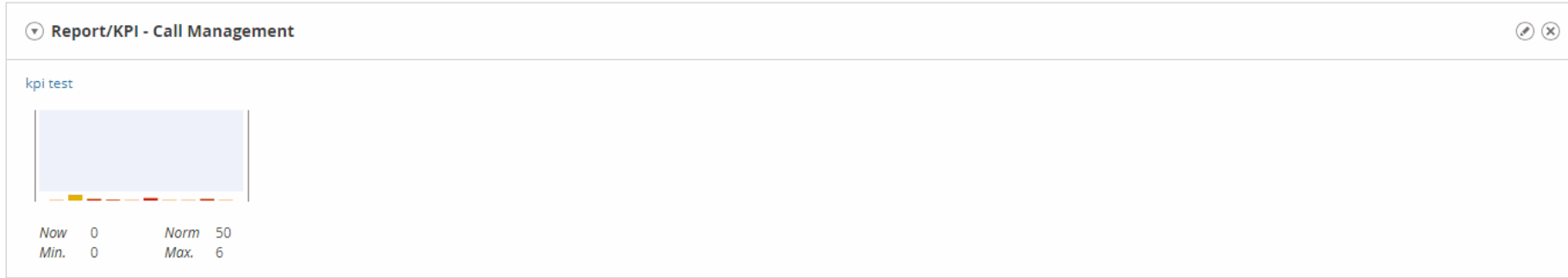


# Welcome Dawn Meadows on the homepage of TOPdesk

Add widget ↻

**Tasks** ✎ ✕

Module	@	@ @ ?
1 First Line Calls	8	38
2 Second Line Calls	0	0
Problems	0	0
Partial Problems	0	0
Known Errors	1	3
Requests for Change (Waiting for authorization)	1	46
Simple Changes	3	34
Extensive Changes (Waiting for authorization)	1	9
Change Activities	17	249
Authorization Activities	1	7
All Changes as Coordinator	26	173
Project Activities	5	49
Expected today (not yet checked in)	0	
All Visitors Present	0	
Operational Activities (this week)	2	4
Reservation Requests	0	14
Reserved Services (today)	0	0



**Main pages** ✎ ✕

Modules

Kanban Board

Settings

Services Task Board

Task Board

Plan Board

Dashboard

**Task per group** ✎ ✕

Application management	@	@
Calls	0	5
Change Activities	0	5
Project Activities	1	2

Facilities management	@	@
Calls	1	18
Problems and Known Errors	0	2
Simple Changes	0	9
Change Activities	0	15
Operational Activities	0	185

IT Services	@	@
Calls	1	7
Problems and Known Errors	1	3

**Latest News**

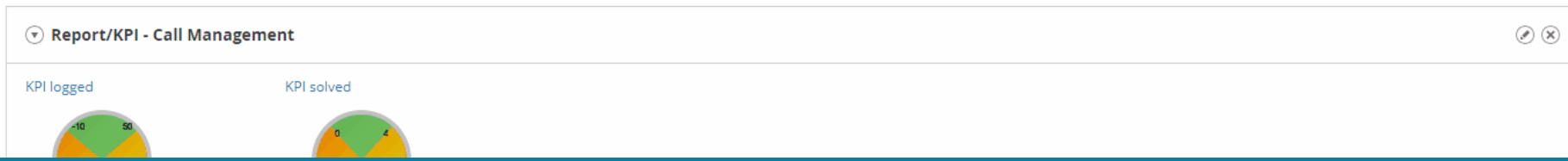
**Welcome to TOPdesk** January 5, 2016

This is the TOPdesk demonstration version.  
TOPdesk offers different systems: TOPdesk Professional and TOPdesk Enterprise.

To get a better understanding of which TOPdesk suits you best please contact our Sales team on +44 207 8034200 or at [info@topdesk.co.uk](mailto:info@topdesk.co.uk).

Many School email accounts are currently receiving suspicious emails asking you to click on a link to reset your password. These emails appear to originate from valid School accounts. We are aware and have taken measures to deal with this. If you have received these emails don't worry, there is no need to inform us.

If you think you have clicked the link and provided your account credentials in response please change your network password immediately and report this to us via the "help me" form in the Contact us section of this portal.





# OPEN

Steekwoorden gebruiken voor zoeken

STARTPAGINA > MIJN WERKPLEK

## Mijn Werkplek

What topic is your question/request about?



### Standard workspace

Standard workspace services



### Mobile phone services

Everything you need to know about our mobile phone policy.



### Printer Services

Print, copy and scan services



### Networks & Connectivity

Includes the company network, wifi, VPN



### E-mail & Calendar Services

Availibty and communication tools



### Accessories & Peripherals

Keyboard, mouse, monitor and webcam



### Mijn objecten

Kennisitem

Kennisitem

# Chat

**Chatting with Dawn Meadows**

Hi, I'm in meeting room 3, and my laptop won't show on the screen.

*Dawn Meadows has joined the chat.*


Hi Chris, I will come to the rescue!


Type your message here



# Chats Chris Lewis

- Available for new chats**
- In queue
- No new chats waiting.
- Active
  - Chris Lewis  
Thanks, please be quick because I ne...  
1 minute ago
- Closed
  - Chris Lewis  
Closed  
about 24 hours ago
  - Chris Lewis  
Closed  
1 day ago
  - Benno Richters  
Closed  
4 days ago
  - Geoffrey Geoffrey S Simpson  
Closed  
4 days ago
  - Chris Lewis  
Closed  
4 days ago
  - Chris Lewis  
Closed  
18 days ago
  - Chris Lewis  
Closed  
18 days ago
  - Chris Lewis  
Closed  
1 month ago
  - Chris Lewis

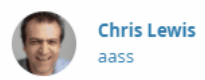
 Hi, I'm in meeting room 3, and my laptop won't show on the screen.

 Thanks, please be quick because I need to start my meeting.

Hi Chris, I will come to the rescue!

Close chat Settings

## » Details



- Selfserviceportal - Mijn Werkplek
- Europe/Amsterdam GMT+0100
- Dutch

# Chat

Type your message here



# Chat

**Version:** Available in Labs on SaaS; On-premises Q2 or Q3

**Paid module:** 2 module points

**More information:** [page.topdesk.com/chat](https://page.topdesk.com/chat)



# Chat queues

**What:** Operator groups in Chat

**Why:** Enabling routing of incoming chats to directly connect you to the correct operator

**Version:** Q2 on SaaS, Q3 on-premises



# Basic Collaboration Platform

**What:** One central platform to connect multiple service management applications.

**Why:** To achieve service excellence over the full service chain by improving the collaboration with third parties.



**Let's first take a look at the message sharing possibilities.**





Coming up

Coming up

First Line Calls To Do | I 1904 008 Smoking p... Adam, A. (Denton Co... | Calendar | Notifications | User

### I 1904 008 Smoking printer

Save | Star | Refresh | Escalate | Create | More

**GENERAL** | INFORMATION | LINKS | WORCADE | EXISTING PROBLEMS | RECENT INCIDENTS | RECENT CHANGES | ATTACHMENTS | AUDIT TRAIL | TIME REGISTRATION

**Adam, A.** Denton County Council  
+49 631 62400-111 - Mobile Number  
adm@topdesdk.dk

**Smoking printer**  
Failure - Telephone  
Network & Data Communication - Printer  
External Number

**PRI005**  
Printer  
37.182.243.165

**Planning**

Priority: P7  
Duration: 1 week  
Target Date: April 9, 2019 2:31 PM  
On hold:

**Processing**

Operator Group: IT Services  
Operator: IT Services  
Supplier:   
Status:   
Responded:   
Closed:

**Meadows, D.** April 2, 2019 02:32 PM  
Hey! The printer on the third floor is smoking again whenever I try to print something.

Send to third party  
 Make invisible to caller

B I U | Image | Link | User | Refresh

Search knowledge items

Send a message to your supplier to get help

Coming up

First Line Calls To Do

First Line Calls

Buttons: New First Line Call, New Second Line Call, Auto refresh, More, Settings

FILTER: not closed, only first line, last 6 days

Lin	Call Number	Caller name	Branch (Caller)	Call Type	Status	Operator	Closed	Target Date	Category	Subcategory	Operator Group	Language
<input type="checkbox"/>	1 1904 007	Dawn Meadows -		Failure			No	April 3, 2019 2:03 PM				

Request | Action | Attachments

0 of 1 selected

This creates a linked call at the supplier, which enables them to respond

Coming up

The screenshot shows a service desk interface for a call titled "1904 008 Smoking printer". The interface includes a left-hand navigation menu with various icons, a top navigation bar with tabs like "GENERAL", "INFORMATION", "LINKS", "WORCADE", "EXISTING PROBLEMS", "RECENT INCIDENTS", "RECENT CHANGES", "ATTACHMENTS", "AUDIT TRAIL", and "TIME REGISTRATION".

**Call Details:**

- Caller:** Adam, A. (Denton County Council, +49 631 62400-111, adm@topdeskd.dk)
- Issue:** Smoking printer (Failure - Telephone, Network & Data Communication - Printer, External Number)
- Priority:** P7
- Duration:** 1 week
- Target Date:** April 9, 2019, 2:31 PM
- On hold:** No
- Processing:** Operator Group: IT Services, Operator: IT Services, Supplier: [blank], Status: [blank], Responded: No, Closed: No

**Message Log:**

- Meadows, D.** (April 2, 2019 02:32 PM): Hey! The printer on the third floor is smoking again whenever I try to print something.
- Meadows, D. Invisible to caller** (April 2, 2019 02:33 PM): Hey Perfect Printers. PRI005 is smoking again. Could you come and take a look? Thanks! (Delivered to Perfect Printers)

**Actions:** Send to third party (Perfect Printers), Make invisible to caller.

**Search:** Search knowledge items

Keep each other in the loop to resolve the call



**Secondly, let's see how you set this up.**



Coming up

Overview System Settings

### Overview System Settings

Navigator Save ↶

- Overview
  - ▶ Technical Settings
  - ▶ Functional Settings
  - ▶ Module Settings
  - ▶ SaaS Settings
  - ▶ Import Settings

#### Technical Settings

- General
- Exchange Calendar settings
- Clean up database
- Personal data protection
- Search
- Document and File Settings
- Email module
- TOPsis
- Image import
- Truststore Management
- CTI module
- Report/KPI
- Import folder

#### Functional Settings

- General
- Labs
- Chat **NEW**
- Collaboration Center **NEW**
- Worcade
- Login Settings
- Email module
- Region and Language
- Caller block
- Look & Feel
- Personal data protection
- File maintenance
- Images
- Categories and Subcategories
- General Drop-down lists
- Task notifications

#### Module Settings

- Self-Service Portal
- Services
- Call Management
- Problem Management
- Change Management
- Project Management
- Change and Project Management
- Visitor Registration
- Operations Management
- Reservations Management
- Item Management
- Asset Management
- Property Management
- Long-Term Planning
- Contract Management and SLM
- Survey Management
- Knowledge Management
- Plan Board
- Task Board
- Action Management
- Supporting Files

#### SaaS Settings

- Bespoke Work Management
- Upload/Download files

#### Import Settings

- Person imports

Initiate the connection to another TOPdesk

Coming up

Functional Settings Collaboration Center

## Functional Settings Collaboration Center

NAVIGATOR Save

- Overview
  - Technical Settings
  - Functional Settings
    - General
    - Labs
    - Chat **NEW**
    - Collaboration Center **NEW**
    - Worcade
    - Login Settings
    - Email module
    - Region and Language
    - Caller block
    - Look & Feel
    - Personal data protection
    - File maintenance
    - Images
    - Categories and Subcategories
    - General Drop-down lists
    - Task notifications
  - Module Settings
  - SaaS Settings
  - Import Settings

LABS Welcome to the TOPdesk Collaboration Platform. Want to know more about upcoming features? [Go to our website](#)

### Setup

Organization name:  ✓  
This is how you will be seen by your collaboration partners.

Service operator:  ✓  
ⓘ This operator will act as a special service operator that will create and update calls on behalf of your partner. The operator should have read permissions on 'REST API' and read, write and create permissions on 'First line calls' and 'Second line calls'. The operator should not have administrator permissions.

### Connections

Organizations with which you can collaborate

**Organizations**

No connections yet

Send to third party

[Create a connection code](#) [Use a connection code](#)

[Give us feedback](#)

### Seamless collaboration with partners and suppliers

Working efficiently with my suppliers allows me to focus more on my core business.

And confirm it on the other side!



Coming up

# Basic Collaboration Platform

**Version:** Available in Labs on SaaS in Q2

NL-3 data center hosted instances only

**More information:** [page.topdesk.com/collaboration-platform](https://page.topdesk.com/collaboration-platform)



# Share & Subscribe from the SSP

**What:** Sharing relevant calls with another affected user from the Self-Service Portal.

**Why:** To further enable the sharing of knowledge between users and, in the end, improve their collaboration.



How can we help you today?



HOME > OFFICE FACILITIES > AIRCONDITIONING AND CLIMATE CONTROL > AIR CONDITIONING MALFUNCTION

## Air Conditioning Malfunction

Malfunction Type: \*

Describe the malfunction: \*

Building

Room

Submit

Share

Want to keep others in the loop? Ask your whiz of a colleague for help? Share this request.

### Possible solutions

For *It's freezing inside our room*

#### Climate control

Question: How does our office climate work? What systems control our office climate?

#### MS Outlook: Out of office

Question: How to send automatic "Out-of-Office" replies from Outlook. Send autom...

#### Central facilities: Watercooler problems

Question: Sometimes the watercooler starts beeping. This will most likely be caused by...

#### Getting started with TOPdesk

The TOPdesk software helps you improve your service management. The content y...

#### Lift Maintenance Supplier

Question: Who are our main maintenance supplier for the lifts?

#### Servicedesk Procedures

Here you find an overview of the process descriptions and procedures in our servic...

#### Printing: Quality of print is bad, no more ink

Question: The quality of print is bad, the printer seems to be out of ink?

Sharing a call from the SSP

How can we help you today?

HOME > IT'S FREEZING INSIDE OUR ROOM

### It's freezing inside our room

I 1903 008



**Dean, J.R.**

Logged on March 22, 2019, 2:57 PM

Describe the malfunction:  
- It is freezing here! Only 17 Degrees :(



**Dean, J.R.**

March 22, 2019, 2:57 PM

Original request.pdf

Add reply

Attach file

Send

Share

Want to keep others in the loop? Ask your whiz of a colleague for help? Share this request.



**Processing**

by Facilities management



**Due date**

March 29, 2019, 2:57 PM

Close

Type  
Failure

Categorization  
Central facilities

Branch, Location  
TOPdesk UK limited, Presentation Room

Sharing a call from the SSP

# Share & Subscribe from the SSP

**Version:** Available on SaaS in Labs

**More information:** [blog.topdesk.com/updates/sharing-calls](https://blog.topdesk.com/updates/sharing-calls)





Coming up

# Share & Subscribe as an operator

**What:** Sharing relevant calls with another affected user as an operator.

**Why:** To further enable smooth collaboration between users.





**Dean, J.R.**

TOPdesk UK limited  
+44 20 78034255 - Mobile Number  
dean@topdeskuk.com

[Share with others](#)

**Details**

Failure - Telephone  
Category - Subcategory  
External Number

**Object / location**

Object Type

**Planning**

Priority: P7  
Duration: 1 week  
Target Date: March 29, 2019 1:57 PM  
On hold:

**Processing**

Operator Group:   
Operator:   
Supplier:   
Status:   
Responded:   
Closed:   
Time Spent: 0:00

**Admin** March 22, 2019 01:58 PM

My sunscreen isn't working.

Make invisible to caller

**B I U**

## Sharing a call as an operator

Search knowledge items

Search the knowledge base for a solution to this call or...

Coming up

# Share & Subscribe as an operator

**Version:** Aiming for Q2 on SaaS in Labs



# Let's talk about Artificial Intelligence



# Smart Categorization (AI)

**What:** Machine learning for categorization suggestions

**Why:** Help operators register calls more quickly and immediately gain the benefits of categorization for follow-up



# I 1903 011 New First Line Call

[Save](#) [★](#) [↺](#) [Escalate](#) [Create](#) [More](#)

- GENERAL**
- INFORMATION
- LINKS
- WORCADE
- EXISTING PROBLEMS
- RECENT INCIDENTS
- RECENT CHANGES
- ATTACHMENTS
- AUDIT TRAIL
- TIME REGISTRATION

## Caller

Name: Adam, A. [dropdown] [more]

Branch: TOPdesk Deutschland Gmb [dropdown] [more]

+49 631 62400-111 - Mobile Number

adm@topdeskd.dk



## Details

Brief Description: [text box]

Entry: Telephone [dropdown]

Call Type: Failure [dropdown]

**Category: [dropdown]**

Subcategory: [dropdown] [more]

External Number: [text box]

[Rich text editor toolbar: B I U, image, link, user, refresh]

[Empty text area with cursor]

- Send to third party
- Make invisible to caller

[Rich text editor toolbar: B I U, image, link, user, refresh]

[Empty text area]

## Object / location

Concerning:  Object  Location

Object ID: [text box] [more]

Object Type: [dropdown]

## Planning

Priority: P7 [dropdown]

Duration: 1 week [dropdown]

Target Date: March 29, 2019 9:23 AM [calendar icon]

**Category suggestions with machine learning**

## Processing

Operator Group: [dropdown] [more]

# Smart Categorization (AI)

**Version:** Available on SaaS in Labs



# Automatic knowledge translations (AI)

**What:** Use external AI via our API to translate knowledge items within TOPdesk

**Why:** Save customers time and costs by automating the knowledge translation process

**Version:** Aiming for Q3 on SaaS





# Resolve Time Predictions (AI)

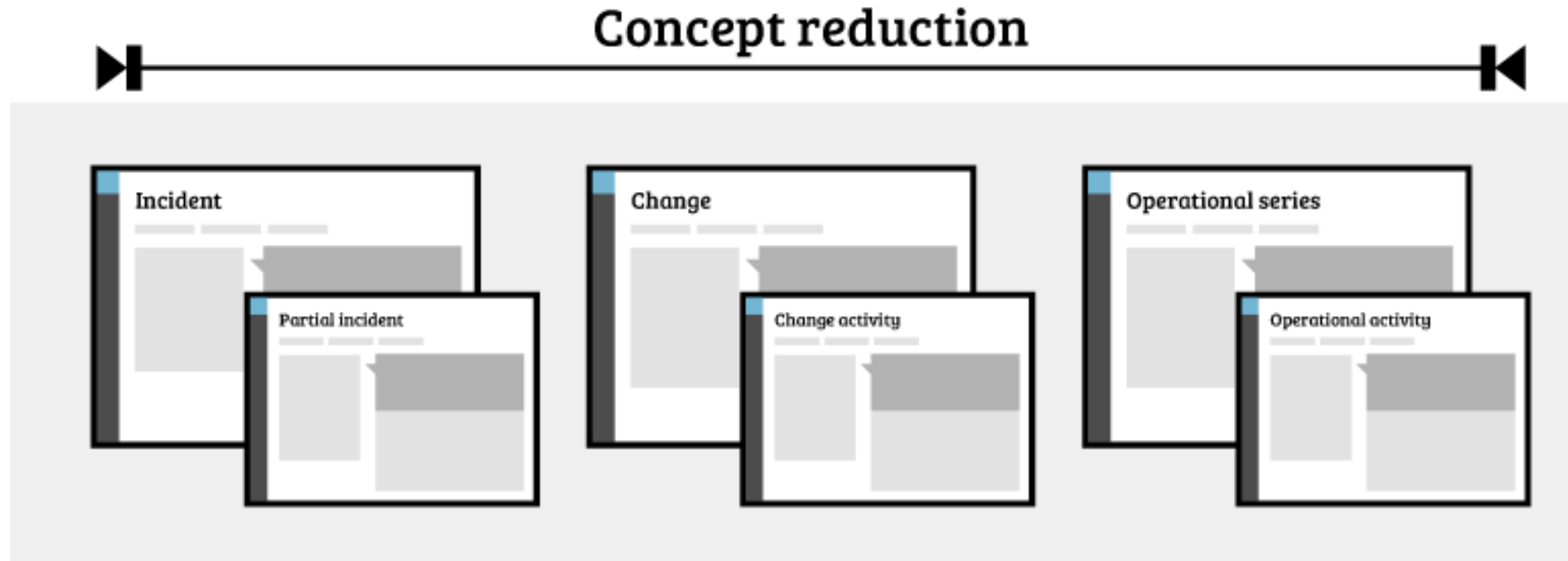
**What:** Predictive Analysis with AI to predict and present predicted resolve times of calls.

**Why:** Improve Service Excellence by proactively supporting operators and/or end-users.

**Version:** Aiming for late 2019 on SaaS



# Tasks & Workflows



# Checklists in second line incidents

**What:** Checklists in second line incidents

**Why:** Templated sub-tasks for easier collaboration and consistency in incident resolution



# IM 1903 10089 Second Line Call

Save ★ ↻ Create ▾ More ▾

- GENERAL
- INFORMATION
- LINKS
- COSTS
- WORCADE
- CUSTOMER SATISFACTION
- CONFIDENTIALITY
- PROCEDURE
- ATTACHMENTS
- AUDIT TRAIL
- TIME REGISTRATION

▶ **John Dean** ●

Skate-plaza  
 ☎ +44 20 78034255 - Mobile Number  
 Management - Management



▶ **Details**

Failure - Telephone  
 Hardware - Laptop  
 External Number

▶ **LAP021**

Laptop  
 Skate-plaza - Facilities

**Checklist**

Use a checklist to add subtasks. Create a new list or apply tasks from a template.

New subtask Apply template

**Planning**

Impact: Person  
 Urgency: Normal  
 Priority:   
 Duration: 8 hours  
 Target Date: March 25, 2019 11:48 AM  
 On hold:   
 Monitored:   
 Expected Time Spent: 0:00

**Processing**

Operator: IT Services

## Checklists in second line incidents

- Responded
- Completed
- Closed

Rich text editor toolbar: B I U [Image] [Link] [List] [User] [Fullscreen]

Make invisible to caller

Rich text editor toolbar: B I U [Image] [Link] [List] [User] [Fullscreen]

# IM 1903 10090 New Second Line Call

Save ★ ↺ Create ▾ More ▾

- GENERAL \* INFORMATION LINKS COSTS WORCADE CUSTOMER SATISFACTION CONFIDENTIALITY PROCEDURE ATTACHMENTS AUDIT TRAIL TIME REGISTRATION

**Caller**

Name: John Dean (dropdown) [Profile Picture]

Branch: Skate-plaza (dropdown)

Network login name: (dropdown)

+44 20 78034255 - Mobile Number

Management - Management

**Details**

Brief Description: (text input)

Entry: Telephone (dropdown)

Call Type: Failure (dropdown)

Category \*: (dropdown)

Subcategory \*: (dropdown)

External Number: (text input)

**Object / location**

Concerning:  Object  Location

Object ID: (dropdown)

Object Type: (dropdown)

**Checklist**

To use a checklist, save the card first

**Planning**

Impact: Person (dropdown)

Urgency: Normal (dropdown)

Priority: (dropdown)

Duration: 8 hours (dropdown)

Target Date: March 25, 2019 11:56 AM

On hold:

**Processing**

Operator: IT Services (dropdown)

Operator Group: IT Services (dropdown)

[Rich text editor toolbar: B I U, image, link, unlink, user, refresh]

[Empty text area]

Make invisible to caller

[Rich text editor toolbar: B I U, image, link, unlink, user, refresh]

[Empty text area]

## Checklists in second line incidents

# Checklists in second line incidents

**Version:** Available on SaaS in Labs, aiming for Q4 on-premises

**More information:** [blog.topdesk.com/updates/checklists-in-calls-templates](https://blog.topdesk.com/updates/checklists-in-calls-templates)



# Checklist template manager

**What:** Overview to manage checklists

**Why:** Gives control over the number of templates and their content, ensuring quality and reliability



# IM 1903 10089 Second Line Call

- GENERAL
- INFORMATION
- LINKS
- COSTS
- WORCADE
- CUSTOMER SATISFACTION
- CONFIDENTIALITY
- PROCEDURE
- ATTACHMENTS
- AUDIT TRAIL
- TIME REGISTRATION

▶ **John Dean** ●



Skate-plaza  
 ☎ +44 20 78034255 - *Mobile Number*  
 Management - Management

▶ **Details**

Failure - Telephone  
 Hardware - Laptop  
*External Number*

▶ **LAP021**

Laptop  
 Skate-plaza - Facilities

**Checklist** ✓ 3/3

- ✓ Get laptop  
 @ IT Services
- ✓ Place laptop  
 @ IT Services
- ✓ Inform caller  
 @ Dawn Meadows

New subtask Apply template

**Planning**

Impact: Person  
 Urgency: Normal  
 Priority:   
 Duration: 8 hours  
 Target Date: March 25, 2019 11:48 AM  
 On hold:

**Processing**

Operator: IT Services

Rich text editor toolbar: B I U [Image] [Link] [List] [User] [Fullscreen]

Make invisible to caller

Rich text editor toolbar: B I U [Image] [Link] [List] [User] [Fullscreen]

# Checklist template manager



# IM 1903 10089 Second Line Call

- GENERAL
- INFORMATION
- LINKS
- COSTS
- WORCADE
- CUSTOMER SATISFACTION
- CONFIDENTIALITY
- PROCEDURE
- ATTACHMENTS
- AUDIT TRAIL
- TIME REGISTRATION

**John Dean** ●

Skate-plaza  
 +44 20 78034255 - Mobile Number  
 Management - Management

**Details**

Failure - Telephone  
 Hardware - Laptop  
 External Number

**LAP021**

Laptop  
 Skate-plaza - Facilities

**Checklist** 3/3

- Get laptop  
IT Services
- Place laptop  
IT Services
- Inform caller  
Dawn Meadows

New subtask | Apply template

**Planning**

Impact: Person  
 Urgency: Normal  
 Priority:   
 Duration: 8 hours  
 Target Date: March 25, 2019 11:48 AM  
 On hold:

**Processing**

Operator: IT Services

Rich text editor with formatting options (B, I, U, link, image, video, insert, undo, redo) and a toolbar.

Make invisible to caller

Rich text editor with formatting options (B, I, U, link, image, video, insert, undo, redo) and a toolbar.

Checklist template manager

# Checklist template manager

**Version:** Available on SaaS in Labs, aiming for Q4 on-premises

**More information:** [blog.topdesk.com/updates/checklists-in-calls-templates](https://blog.topdesk.com/updates/checklists-in-calls-templates)



# Sequential workflows

**What:** Sequential workflows with tasks depending on each other

**Why:** Enabling complex changes (for example across departments) to be worked on at the right times

**Version:** Aiming for Q3 on SaaS



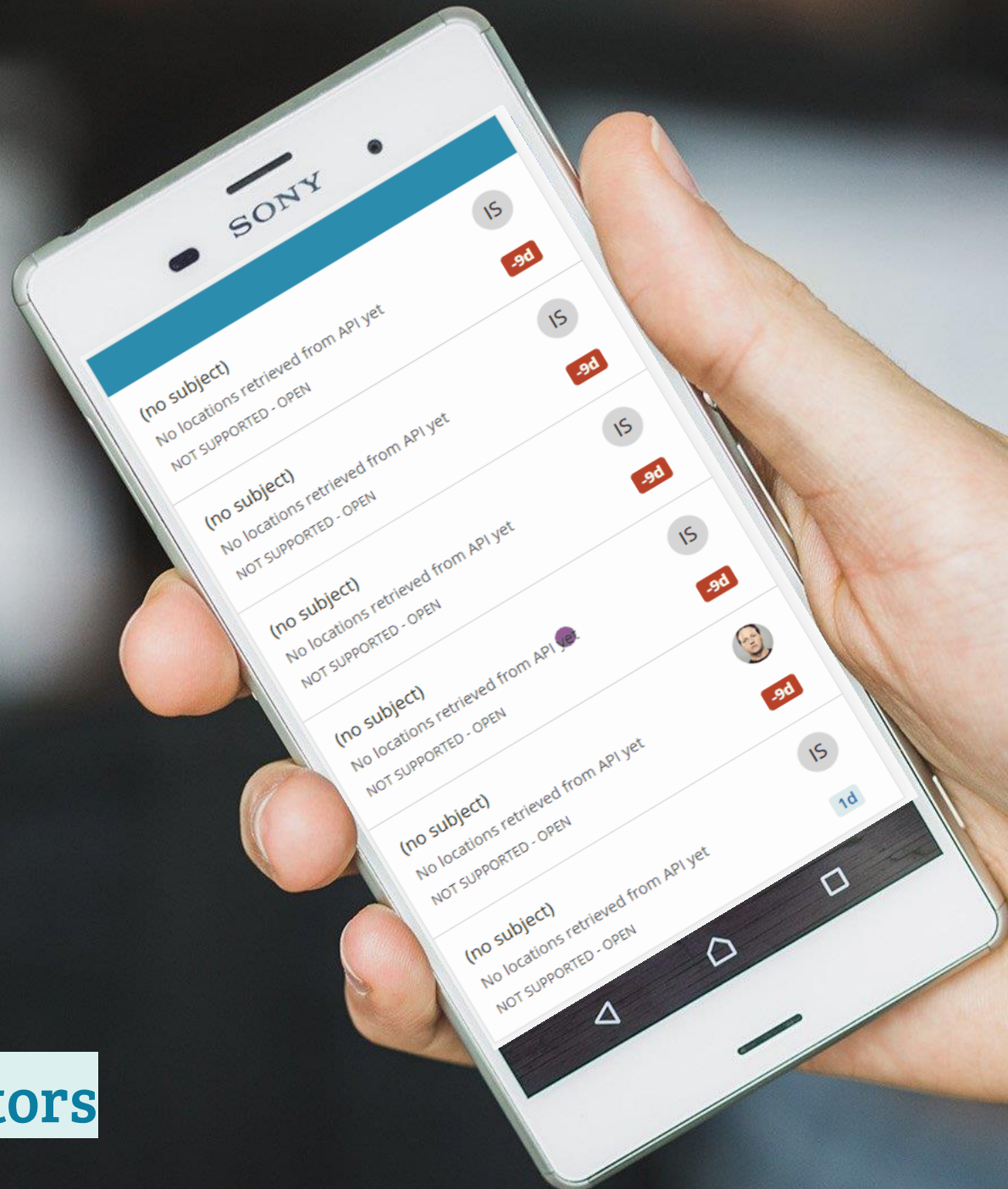
# Mobile for operators

**What:** Progressive Web App based on the new Task system

**Why:** Enabling working on your todo anywhere and anytime



Coming up



Mobile for operators

Coming up

# Mobile for operators

**Version:** Aiming for Q3 on SaaS



# Overview what else is built or coming up

- Kanban board enhancements
- Asset Management organizational filters
- Virtual appliance
- OData filtering
- Response times agreements & reporting
- Work instructions for operators
- Asset audit



**We'll email you an overview tomorrow**



# Finding more information

Update blog and monthly newsletter

[blog.topdesk.com/updates](https://blog.topdesk.com/updates)

Roadmap

[productroadmap.topdesk.com](https://productroadmap.topdesk.com)

Release notes

[releasenotes.topdesk.com](https://releasenotes.topdesk.com)





# Thank you for attending

We'd love to hear from you!

