

helpshift

Welcome to Helpshift

 Get information from user

Fit

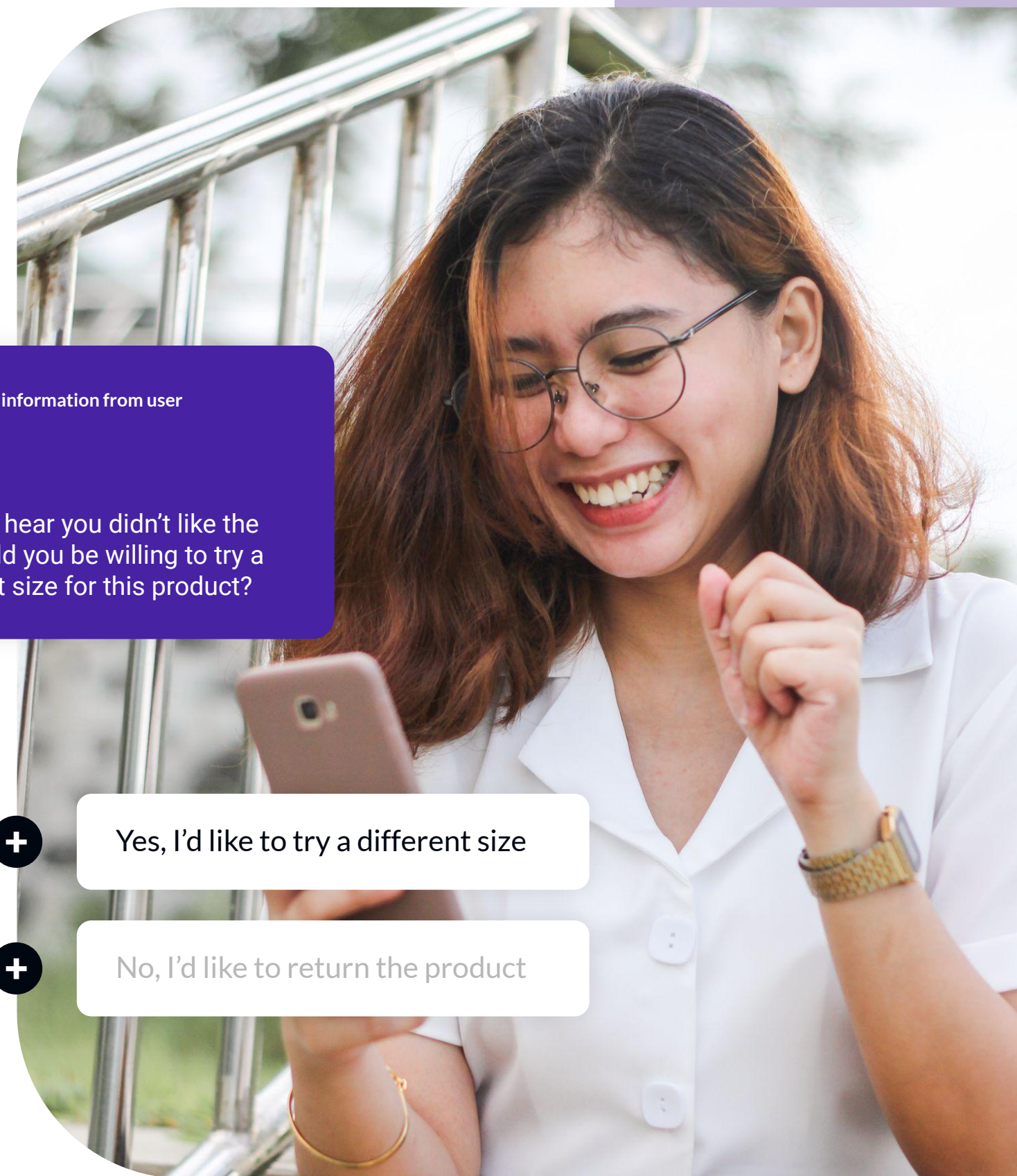
Sorry to hear you didn't like the fit. Would you be willing to try a different size for this product?



Yes, I'd like to try a different size



No, I'd like to return the product



Agenda

- 1.** Introduction to Helpshift and Goal Setting
- 2.** Self-Onboarding Guides
- 3.** Managing Teams and Groups
- 4.** Help Center 2.0
- 5.** Email, Web, SDK Implementation
- 6.** Custom Issue Fields & Tags
- 7.** Compliance and Resources

Setting Expectations and Goals

1 During the webinar

1. Onboarding Presentation: Part One (~60 minutes)

- **Goal:** To equip you with the knowledge and tools you need to set up Helpshift
- Remember to download the slide deck below the video player

2. Ask questions about your team's goals

- **Goal:** To help address specific needs

2 Post webinar

Follow-Up Emails, Including:

- The on-demand webinar link and additional resources .
- Ways to get your questions answered.
- Options for a more tailored onboarding experience.

Defining Your Specific Helpshift Goals

3 Questions

1. What is most important to you in terms of providing support?
2. How is your support currently handled (i.e. with specialized agents, by issue type, by game/app, etc.)?
3. How do you want to segment your users?

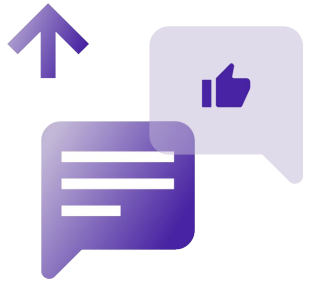
4 Your answers

- 1.
- 2.
- 3.

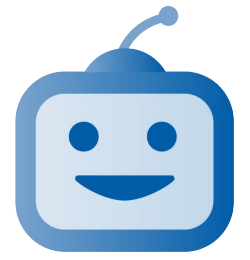
Introduction to Helpshift



We built the only mobile-first customer service platform to rid the world of bad customer service.



Our platform reduces friction and frustration for customers and agents.



We also help support teams scale using automation and bots.

Self-Onboarding Guides in Helpshift

Self-onboarding guides help provide step by step introduction and implementation of Helpshift features.

Your First Steps

- Dashboard overview
- Setting up In-App support
- Custom Issue fields

Self-service Setup

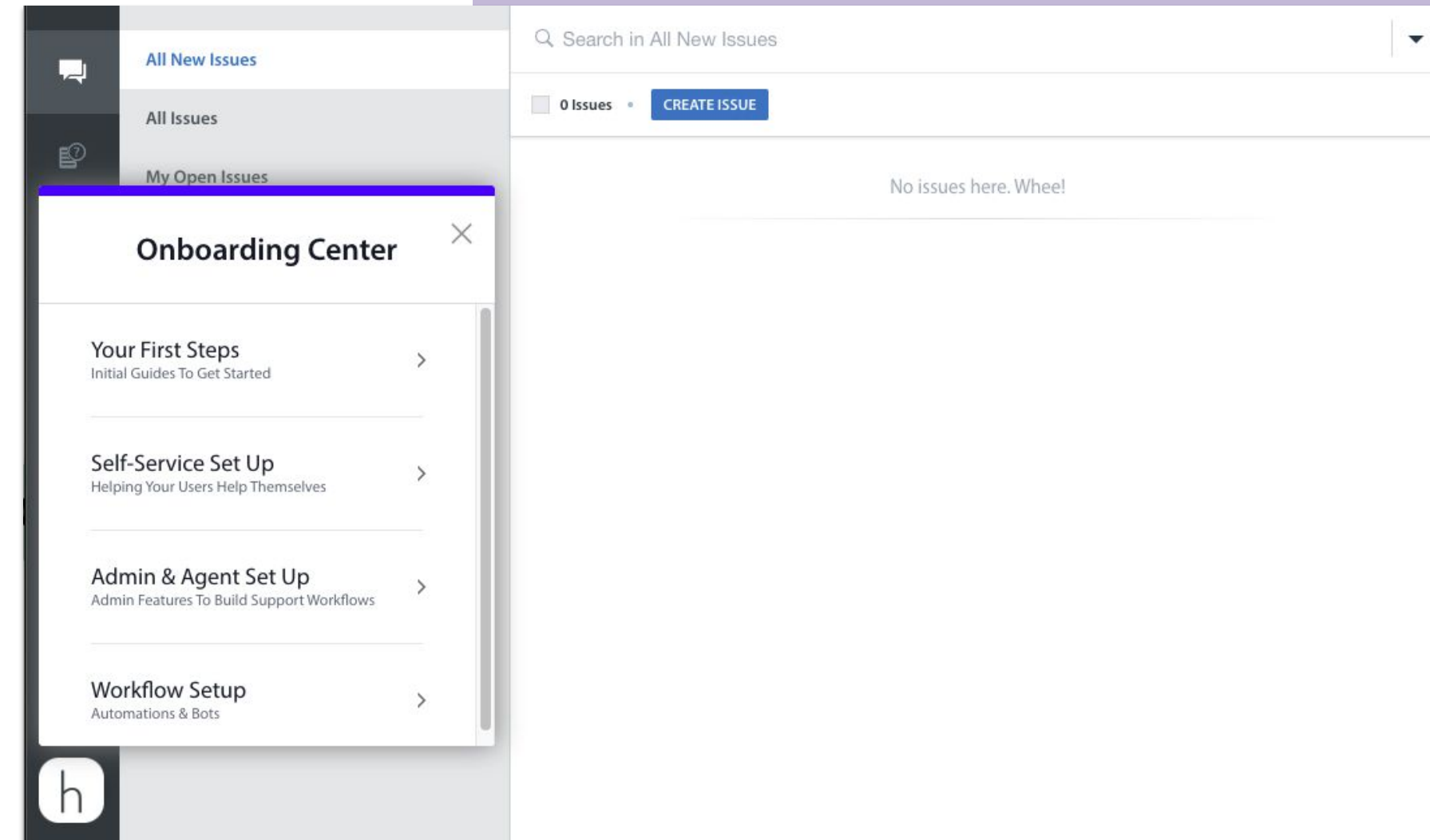
- Creating FAQs
- Setup Web Support Portal
- QuickSearch Bot set-up
- Helpshift Analytics

Admin & Agent Set Up

- Setting up Smart Views
- Create Quick Replies
- Create Text Templates

Workflow Setup

- New Issue Automations
- Time Based Automations
- Setup Custom Bots



Managing Teams in Helpshift

Roles available in Team(s):

- Admins
- Supervisors
- Agents

Ways to organize teams:

- By geographic location
- By function (Operations, Priority, etc.)
- By outsourced agents (maintaining certain SLAs, skills or permission sets)

The screenshot displays the 'Team' management interface in Helpshift. At the top, there are buttons for 'INVITE PEOPLE', 'ADD TEAM', and a search bar labeled 'Search teams'. Below this, a summary states 'Your organization has 16 active members across 2 teams.' Two team cards are visible: 'Shiftazon' and 'Shiftaway'. The 'Team Shiftazon (10)' card is expanded, showing a list of members categorized into three groups: Admins (57), Supervisors (3), and Agents (3). Each member entry includes a profile picture, name, email address, and a settings gear icon.

Role	Name	Email	Skills/Groups
Admins (57)	Carmen	carmen@shiftazon.com	
	Rajan	rajan@shiftazon.com	
	Me	renee@shiftazon.com	
Supervisors (3)	John	john@shiftazon.com	Spanish
	Erica	erica@shiftazon.com	English Group, Technical Support
	Mira	mira@shiftazon.com	
Agents (3)	Colin	colin@shiftazon.com	English Group, Spanish
	Hiro	hiro@shiftazon.com	
	Rachel	rachel@shiftazon.com	Technical Support

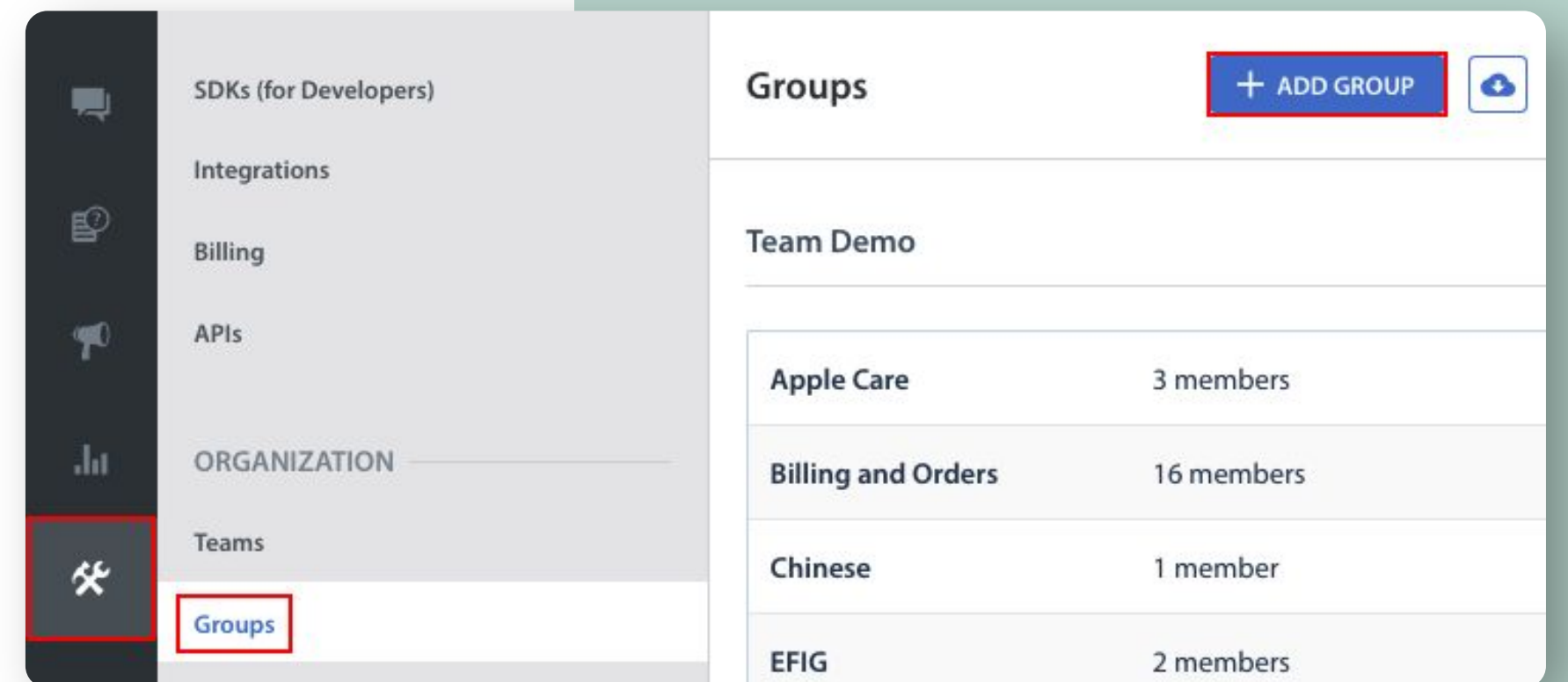
Managing Groups in Helpshift

Enables admins to manage different tiers of support

Helps improve team efficiency

When to use Groups:

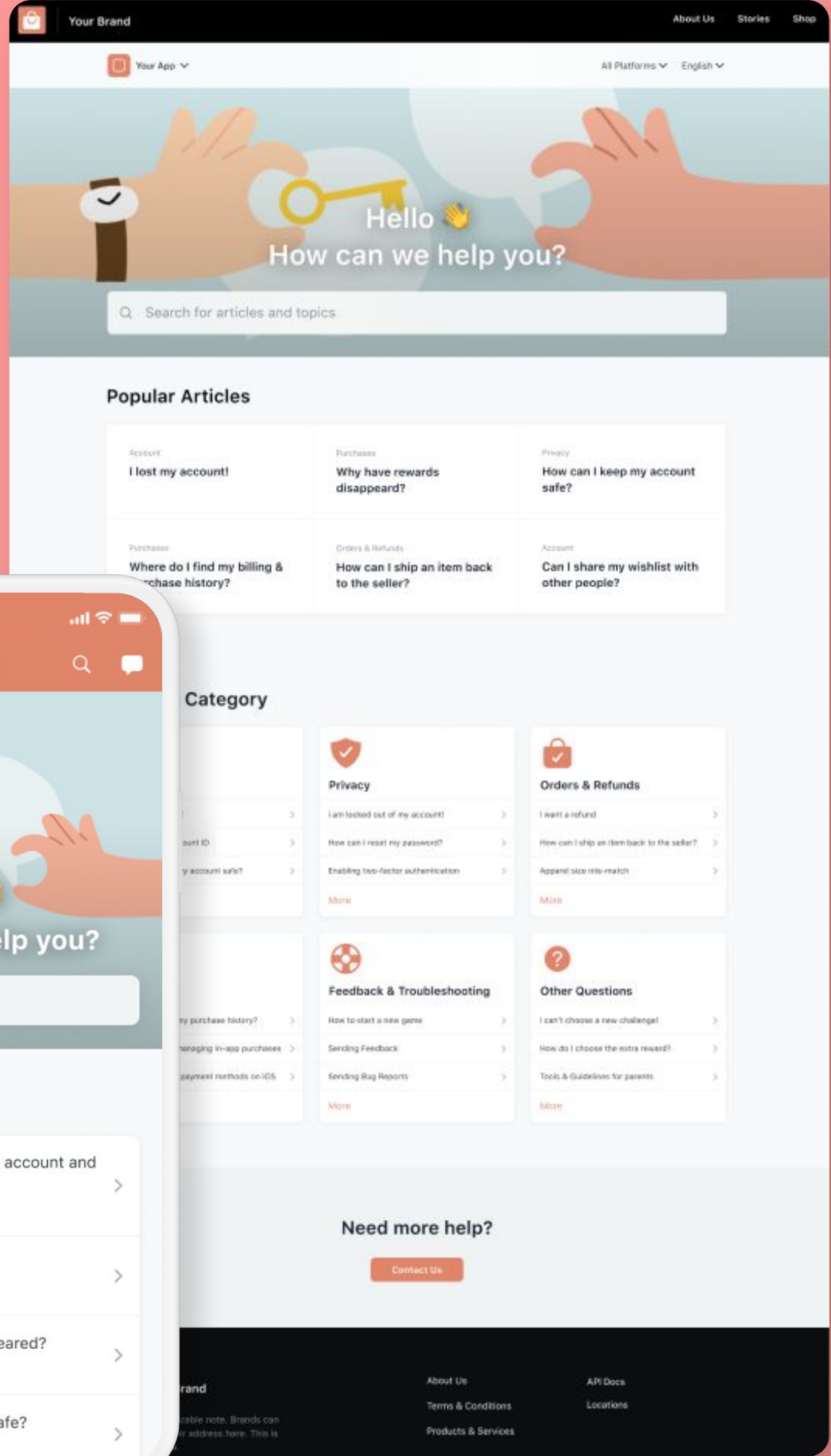
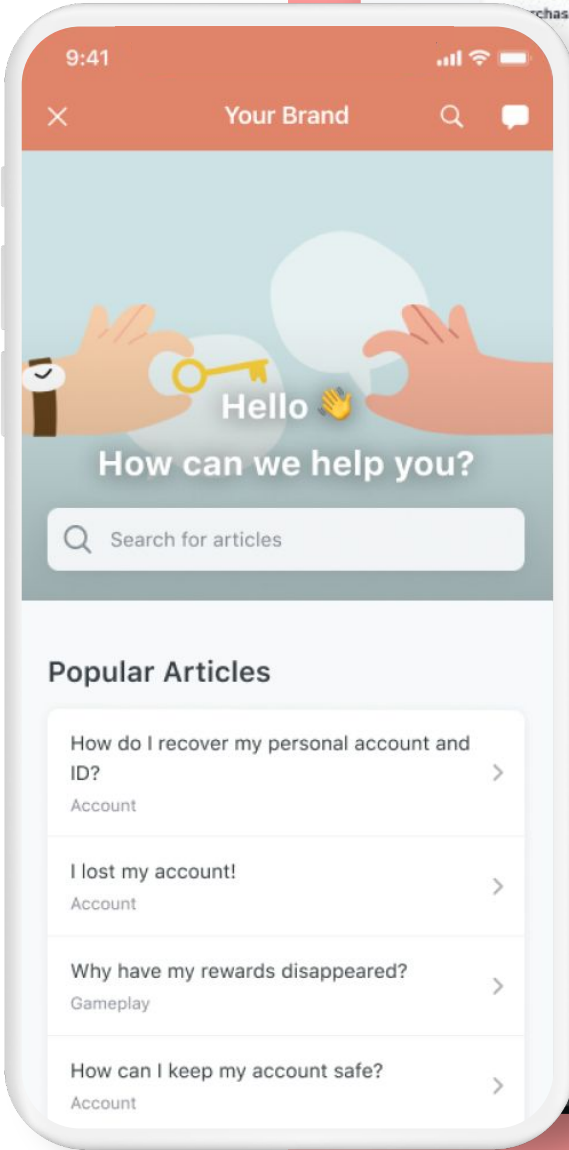
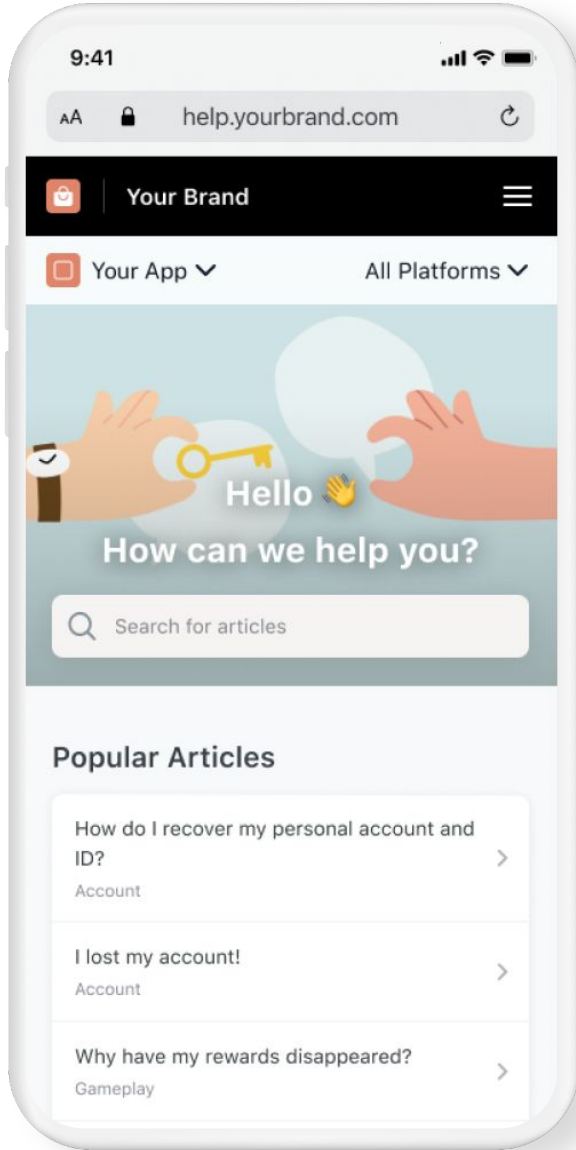
- Large group with hierarchy
- Different teams working on Helpshift (Support, Product, Devs, QA, etc.)
- Supporting multiple languages
- Dashboard with multiple apps



Helpshift Help Center 2.0

New web support portal with:

- Modern page designs
- Easy image, color, and font customization
- Improved discoverability of support content
- Better search
- Expanded support for end users to rate articles and FAQs





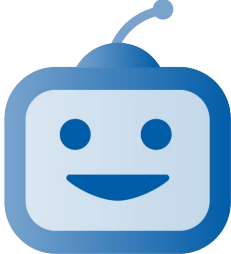
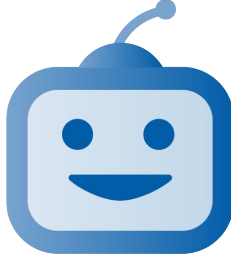
Issue Types and Segments

Issue Type (e.g. General vs. Technical)

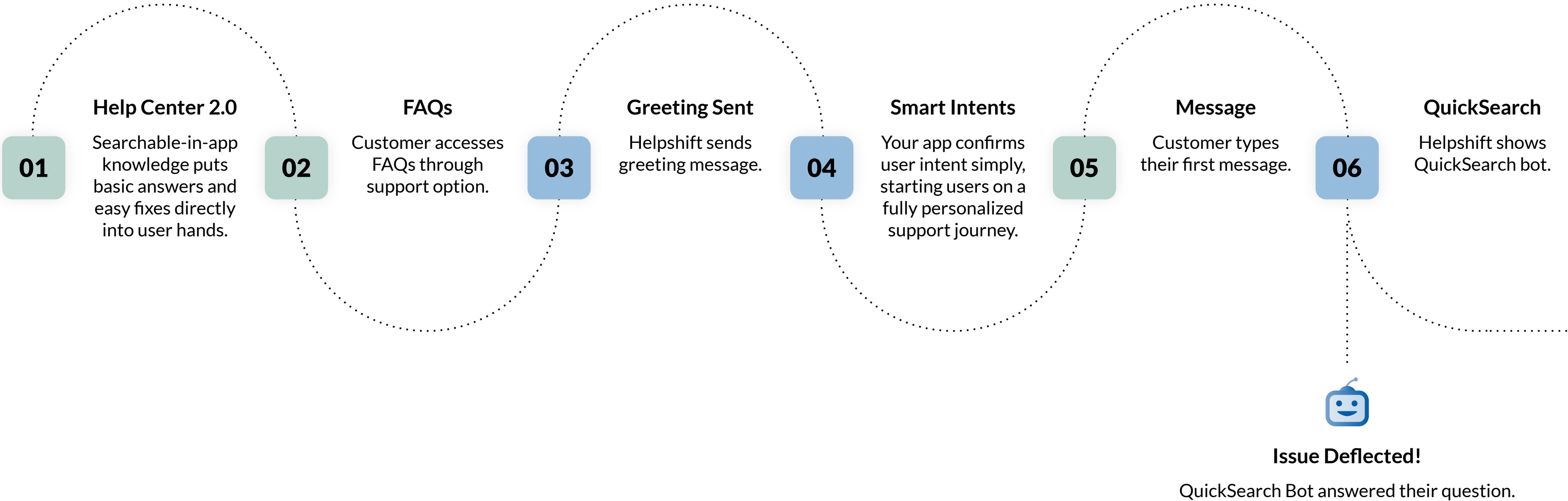
- What are your most common issues?
- How do your agents handle these issue types?
- Can these issues be resolved by bots or could a bot collect more information from the customer?

User Segments (e.g. VIP vs. non-VIP)

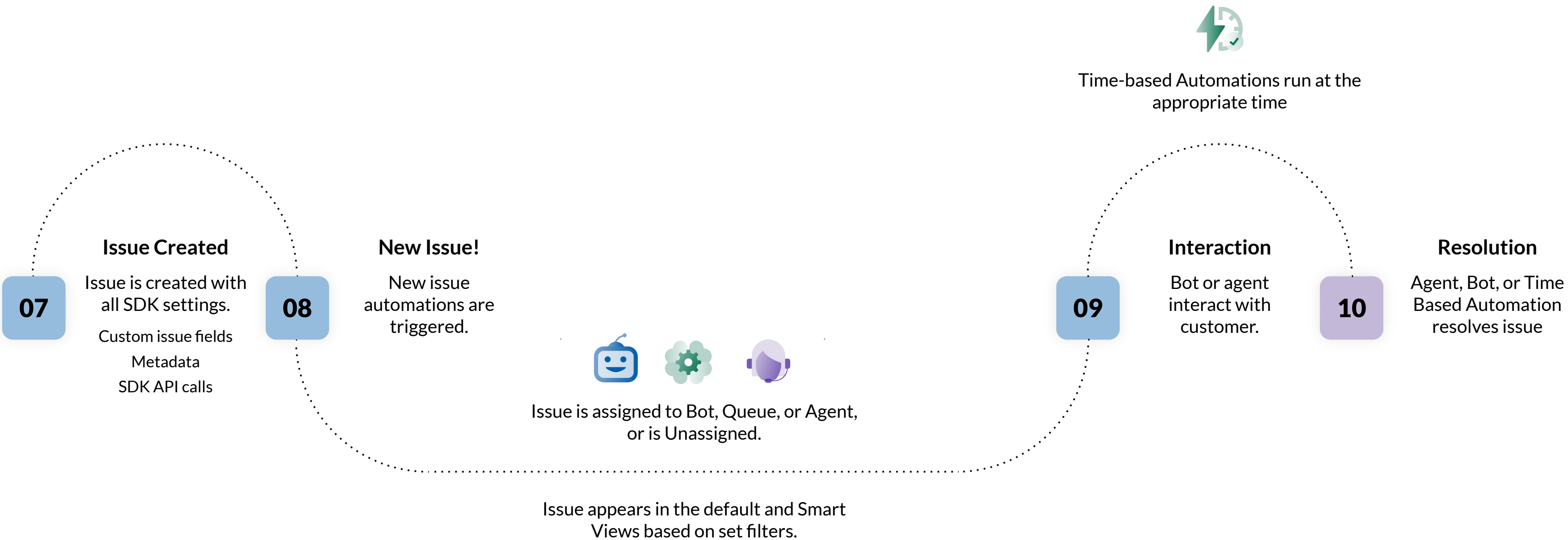
- What factors impact your workflows?
- Who should interact with bots?
- Which languages will you support?

	Common Issue	Special Issue
VIP	 Agent/Bots	 Agent
Non-VIP	 Self-Serve & Resolve	 Gathering Info for Agent

The Life of an Issue: Pre-Issue Creation



The Life of an Issue: Once Issue Is Created



Helpshift Web Chat Implementation

The Web Chat widget is embedded on the web page:

Embed code:

- [Getting Started Guide](#)
- Find Embed code in the App Settings

APIs to show the Web Chat

- Hide/Show widget
- Open/Close widget

My App - App Settings
Publish ID - 3

Supported Platforms + ADD PLATFORM

iOS
Not Available
No store details provided.

Android
Not Available
No store details provided.

Web Chat

Embed code to have Web Chat widget on your website.

Show Web Chat Widget

Quick Links

General Settings Push Notifications
Support Experience App Review Url

Customizing widget with code [↗](#)

Support Experience Business Hours

Helpshift Web Chat (cont'd)

You can configure web chat as an Admin:

- QuickSearch Bot
- Branding and appearances
- Greeting message
- Resolution Question/CSAT
- Business Hours:
 - Define the hours that the chat is showing up

← Back to App Settings

Web Chat Configuration

Support Experience Business Hours

Branding & Appearance

Title Reset to default

sys.wc.widget_title 80 characters maximum

Primary Color Reset to default

#30A246

Show avatar in the header

App Avatar

Greeting Message

Send a greeting message to users when they open the Web Chat widget. [Learn More](#)

Hi there! Thank you for contacting our store - how can we help you?

Answer Bot

Allow Web Chat to automatically respond to user's questions with relevant FAQs. [Learn More](#)

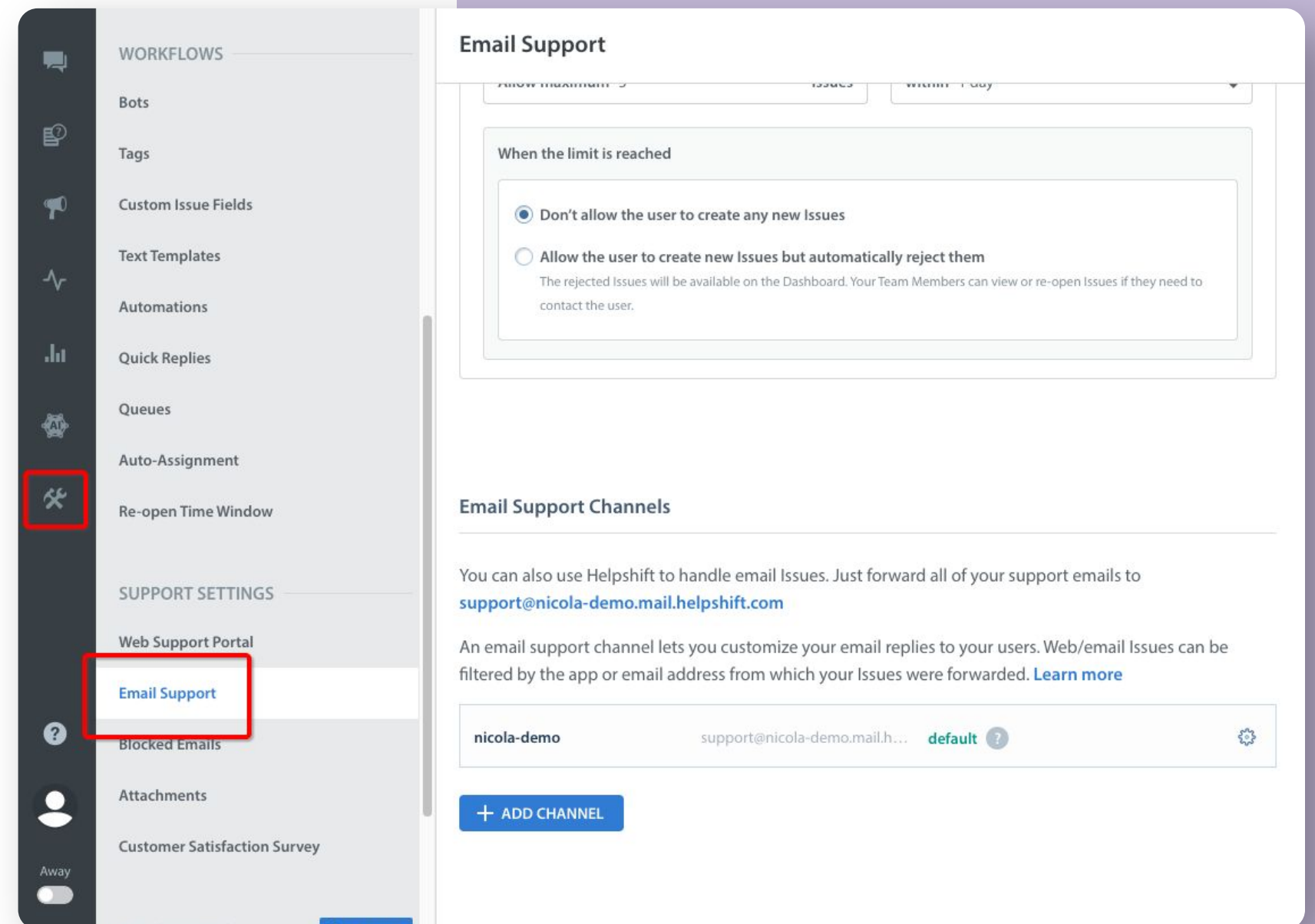
Note: Answer bot will only suggest FAQs that are published and visible for the Web platform.

Helpshift Email Implementation

You can forward emails to Helpshift and manage them through the platform:

Getting Started Guide

- Emails are forwarded from your email accounts into Helpshift
- support@DOMAIN.helpshift.com
- You can add multiple email channels, which can have customized HTML and text

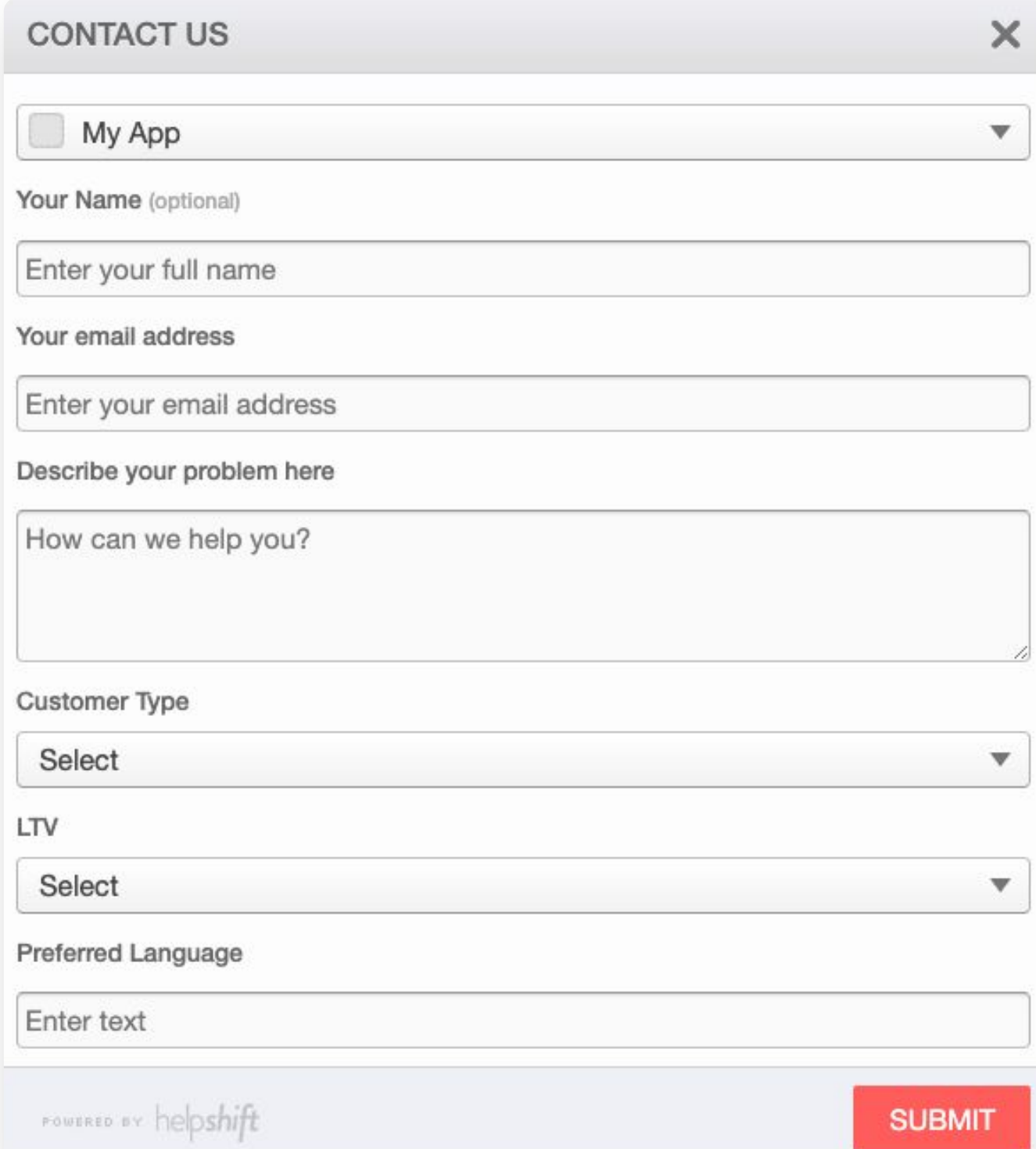


Helpshift Web Form Implementation

You can use a web form to capture a customer's first request, along with other specified information.

If you're considering email, we recommend Web Form instead, because it can:

- Collect additional data through fields on the form
- Map to specific Custom Issue Fields
- Find Embed code in the App Settings



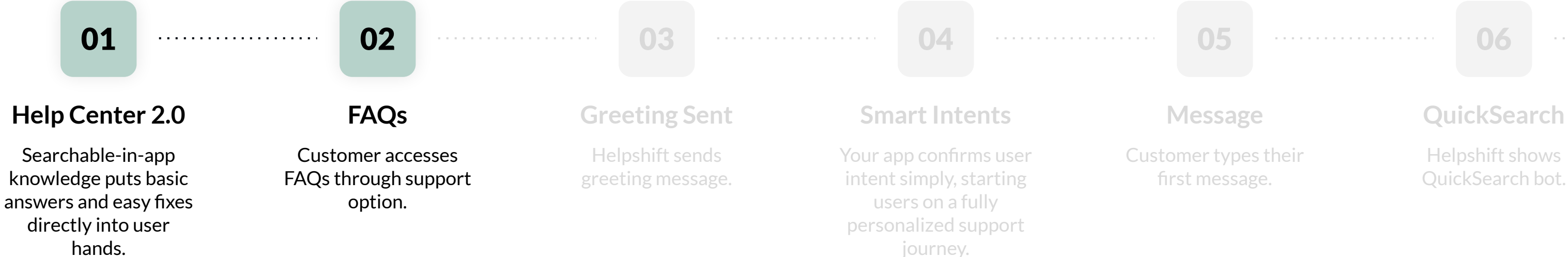
The image shows a 'CONTACT US' web form with the following fields:

- A dropdown menu with 'My App' selected.
- A text input field labeled 'Your Name (optional)' with the placeholder text 'Enter your full name'.
- A text input field labeled 'Your email address' with the placeholder text 'Enter your email address'.
- A text area labeled 'Describe your problem here' with the placeholder text 'How can we help you?'.
- A dropdown menu labeled 'Customer Type' with 'Select' as the current selection.
- A dropdown menu labeled 'LTV' with 'Select' as the current selection.
- A text input field labeled 'Preferred Language' with the placeholder text 'Enter text'.
- A red 'SUBMIT' button at the bottom right.
- A footer at the bottom left that says 'POWERED BY helpshift'.

Helpshift Software Development Kit (SDK)

The Life of an Issue

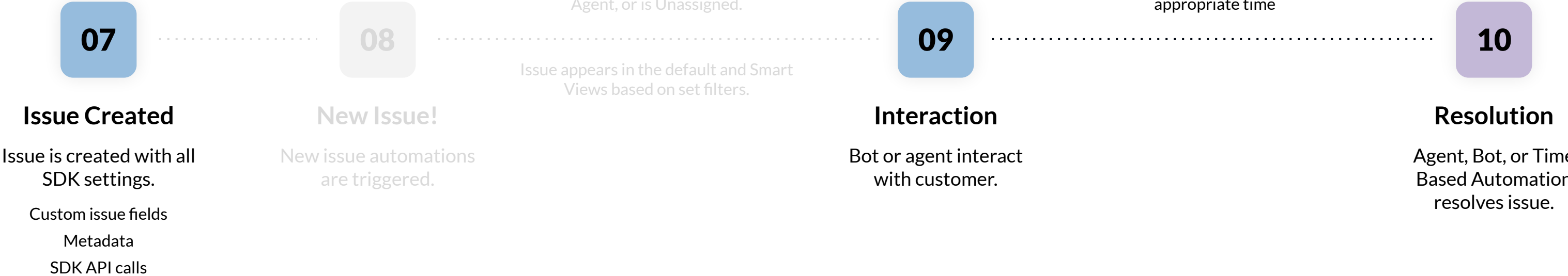
Pre-Issue Creation:



Issue Deflected!
QuickSearch Bot answered their question.

Issue Created!
On to step 7...

Once an Issue is Created:



Helpshift SDK (cont'd)

The SDK enables you to connect Helpshift to your mobile app.

- Give your developers your API key, which you can find in settings
- **Current version:** 10.1.0 (Android) and 10.1.0 (iOS)
- **Guide:** [SDKx Configuration](#)

The screenshot shows the Helpshift developer console interface. On the left is a navigation sidebar with a dark background and white icons. The 'SDKs (for Developers)' menu item is highlighted with a red box. Below it are sections for 'ORGANIZATION' (Team, Groups, Permissions, Announcements) and 'WORKFLOWS' (Bots, Tags, Custom Issue Fields, Text Templates, Automations, Quick Replies, Queues, Auto-Assignment, Re-open Time Window). The main content area is titled 'Initializing Helpshift' and contains instructions: 'Select an app below to get SDK initialization code for different platforms. App ID is unique for each platform, i.e. the App ID for an iOS app wouldn't work on an Android app. Make sure to select the correct platform while copying these details. Head over to our [Developer Documentation](#) for more details on how to integrate Helpshift SDK.' Below the instructions is a 'Select App' dropdown menu with 'My App' selected. A table of configuration details is shown, with the iOS and Android sections highlighted by a red border. The table has columns for platform, API_KEY, DOMAIN, APP_ID, and Initialization Code. The Web Chat section is also visible below.

Platform	API_KEY	DOMAIN	APP_ID	Initialization Code
iOS	11241ac33dad196fedf635a7b994776d	nicola-demo.helpshift.com	nicola-demo_platform_20190927172343041-3e0f1ba4bfa35c6	[HelpshiftCore installForApiKey:@"11241ac33dad196fedf635a7b994776d" domainName:@"nicola-demo.helpshift.com" appId:@"nicola-demo_platform_20190927172343041-3e0f1ba4bfa35c6"]
Android	11241ac33dad196fedf635a7b994776d	nicola-demo.helpshift.com	nicola-demo_platform_20200730192411120-533d143d510b4ff	Core.install(this, "11241ac33dad196fedf635a7b994776d", "nicola-demo.helpshift.com", "nicola-demo_platform_20200730192411120-533d143d510b4ff", config);
Web Chat		nicola-demo	nicola-demo_platform_20191205213930152-70c7740af7ffd1c	<script> (function () { var PLATFORM_ID = "nicola-demo_platform_20191205213930152-70c7740af7ffd1c", DOMAIN = "nicola-demo", LANGUAGE = "en"; window.helpshiftConfig = { platformId: PLATFORM_ID

Helpshift SDK (cont'd)

Each app has the following:

- **API Key:** This is your unique developer API Key
- **Domain Name:** This is your Helpshift instance domain name without any http: or forward slashes
- **App ID:** This is the unique ID assigned to your app

To get the API Key, domain name, and the App ID, navigate to Settings>SDK (for Developers) in your agent dashboard and scroll down to "Initializing Helpshift" section.

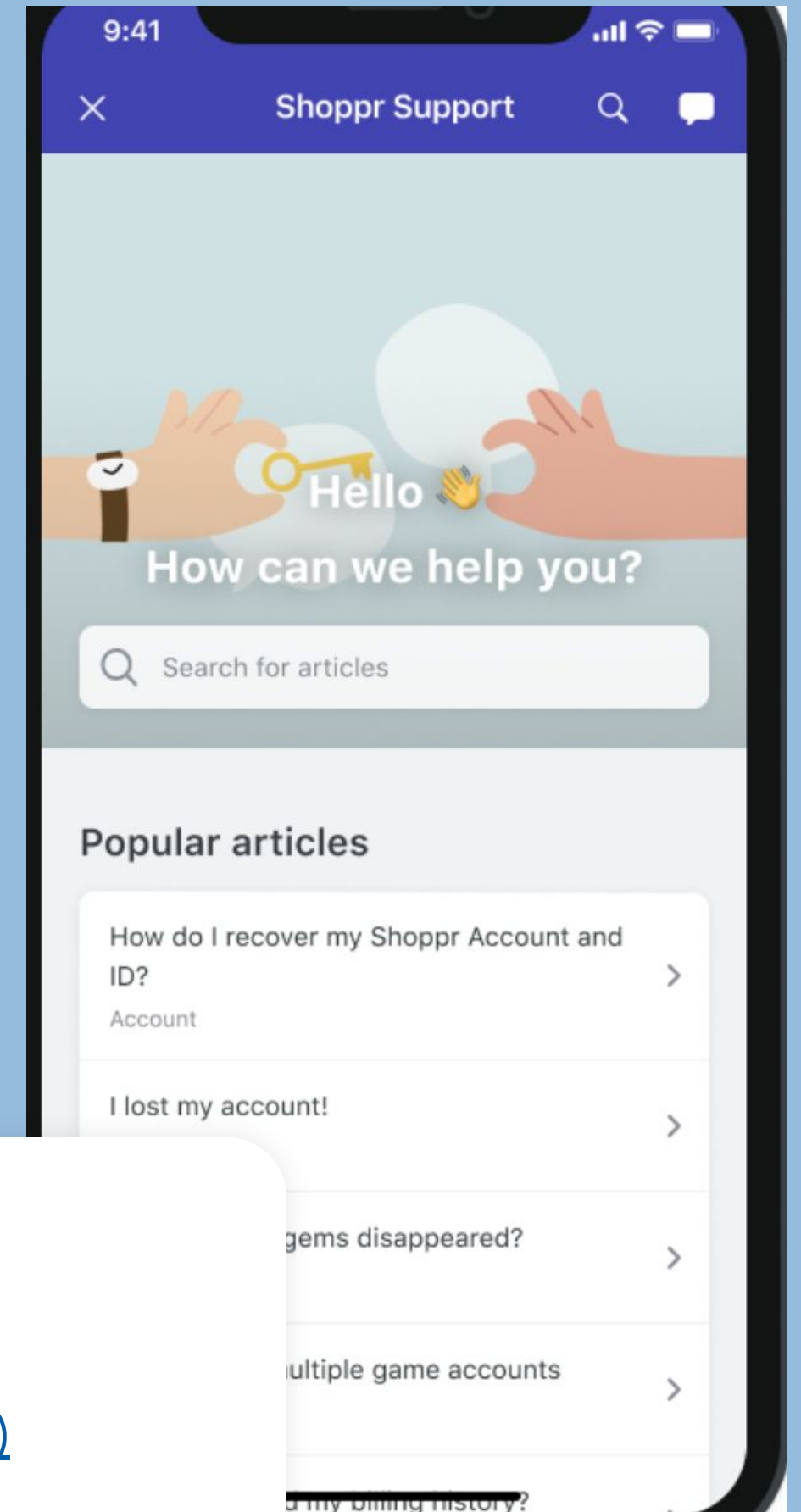
Documentation:

- [Developer Doc \(iOS\)](#)
- [Developer Doc \(Android\)](#)

Helpshift SDK (cont'd)

Show Faqs

- You can use the API call `showFAQsWith:config:` to provide a way for the user to invoke the purpose-built help/support section in your app.
- This is the easiest approach to enable help in your app as it bundles all the capabilities of the Helpshift SDK in a simple and intuitive interface.
- You can wire this API call to a "Help" or "Support" action in your app



Documentation:

- [Developer Guide \(IOS\)](#)
- [Developer Guide \(Android\)](#)

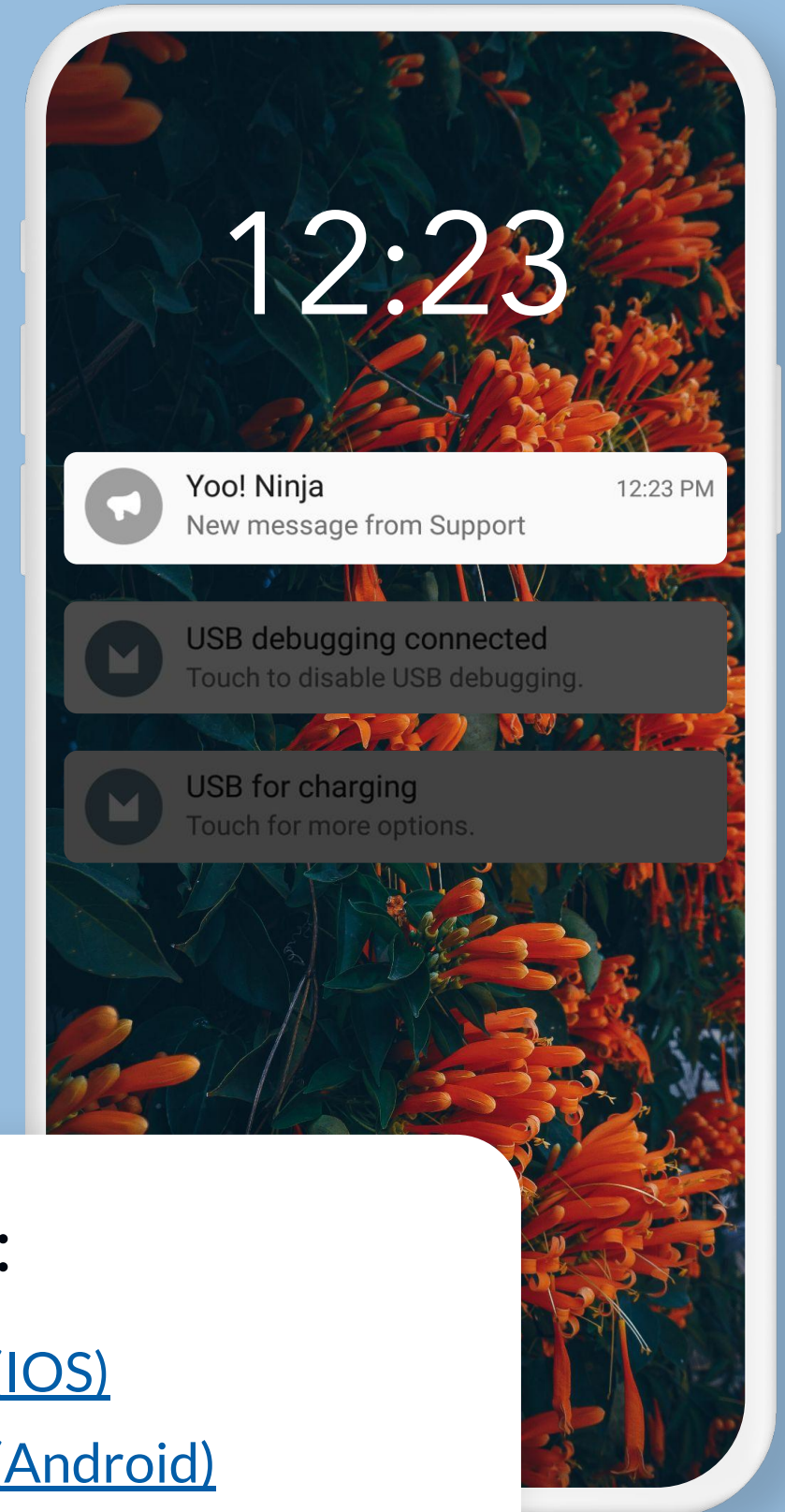
Helpshift SDK (cont'd)

What are Push Notifications and Badges?

- Push Notifications alert your players/customers that they have a message waiting for them
- Badging will enable your players to see that there is a support message waiting for them

Benefits of setting up Push Notifications and Badging:

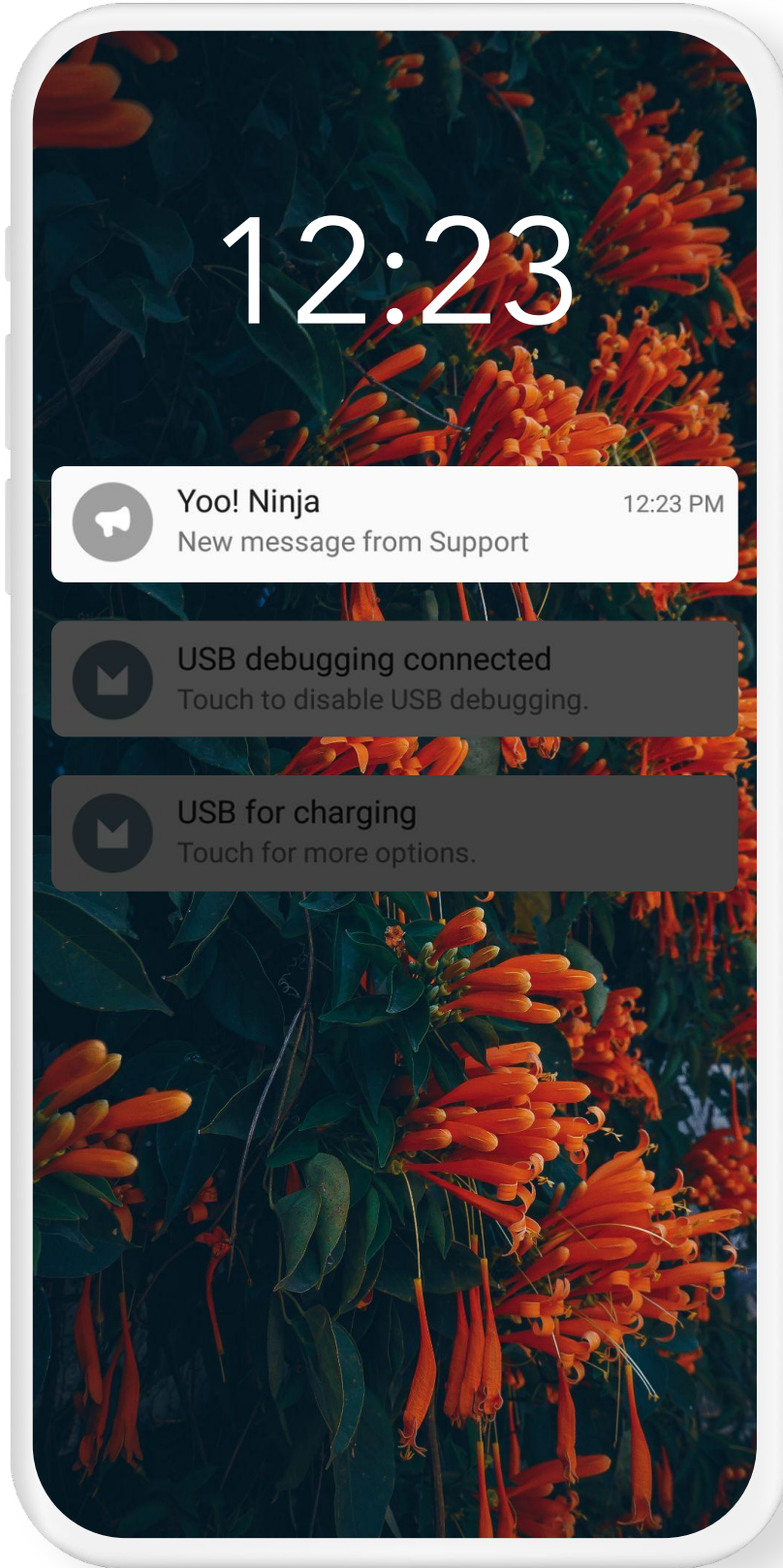
- Notifies users when your team is able to respond
- Increases engagement



Documentation:

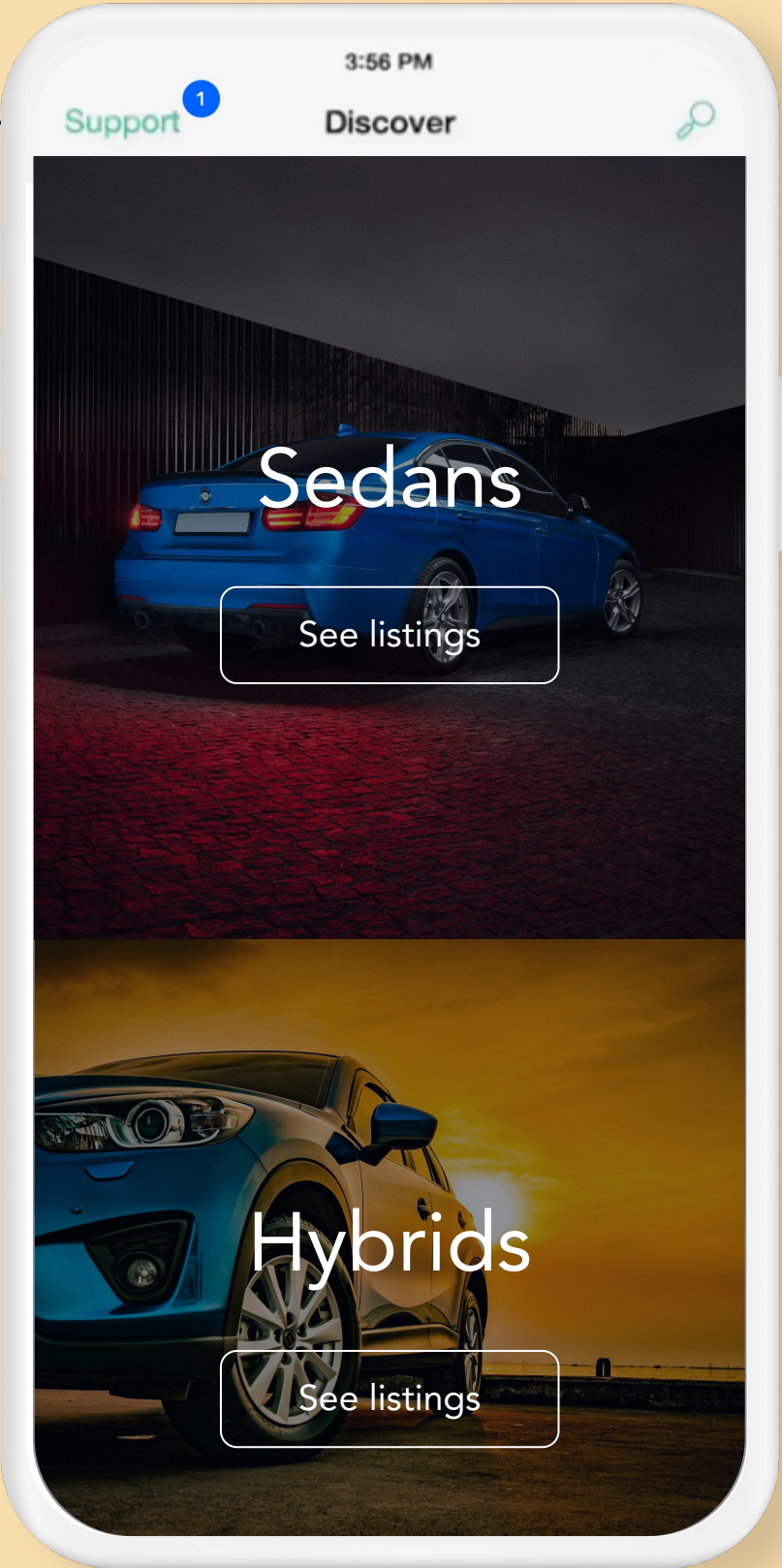
- [Developer Guide \(IOS\)](#)
- [Developer Guide \(Android\)](#)

Helpshift SDK (cont'd)



..... Push Notifications

Badging



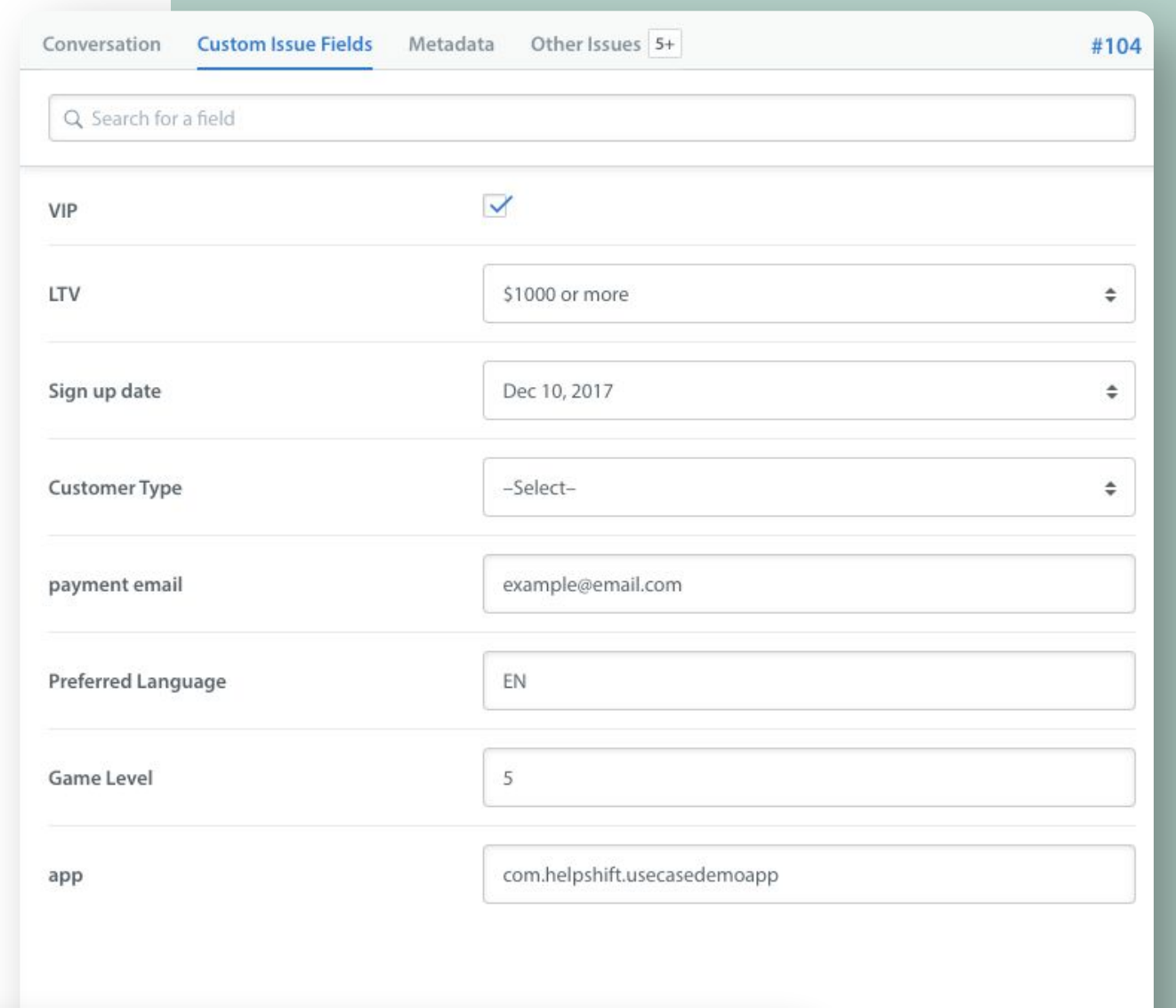
Helpshift SDK (cont'd)

Benefits of connecting Custom Issue Fields:

- Increases Helpshift segmentation capabilities
- Gives agents more data on their customers within the Helpshift dashboard

Setting up Custom Issue Fields (as a developer):

- Each Custom Issue Field has a key, data type, and value



The screenshot shows the 'Custom Issue Fields' tab in the Helpshift dashboard for a conversation with ID #104. The interface includes a search bar and a list of fields with their respective values:

Field Name	Value
VIP	<input checked="" type="checkbox"/>
LTV	\$1000 or more
Sign up date	Dec 10, 2017
Customer Type	-Select-
payment email	example@email.com
Preferred Language	EN
Game Level	5
app	com.helpshift.usecasedemoapp

Documentation:

- [Developer Doc \(IOS\)](#)
- [Developer Doc \(Android\)](#)

Helpshift Custom Issue Fields

Custom Issue Fields support workflows and provide organized tracking and reporting:

- Pull in customer data via the SDK/logged-in web page
- Allows you to build out workflows based on tracked data
- These Custom Issue Fields are sent whenever a new issue is created

Two main uses:

- Information to help your agents as they resolve issues
- Customized workflows based on these fields

The screenshot shows the 'Custom Issue Fields' management page. At the top right is a search bar labeled 'Search Fields'. Below the title is a descriptive paragraph: 'Use Custom Issue Fields to classify Issues by assigning labels and types. Custom Issue Fields must be created before they will appear on Issues. Archiving a Custom Issue Field prevents use of that field.' There are two buttons: '+ NEW FIELD' on the left and 'EDIT ORDER' on the right. Below these is a table of existing fields:

LTV	Drop-down	⚙️
Sign up date	Date	⚙️
Customer Type	Drop-down	⚙️
VIP_Test	Checkbox	⚙️
payment email	Single Line Text	⚙️
Preferred Language	Single Line Text	⚙️
Game Level	Number	⚙️

Helpshift Custom Issue Fields (cont'd)

Setting up a Custom Issue Field:

- Different field types
- Consist of:
 - **Label:** Name as it appears in Helpshift
 - **Key:** How you communicate Custom Issue Field values from your SDK (automatically generated)

The screenshot shows the 'Edit LTV Field' configuration window. It includes a close button (X) in the top right corner. Below the title, there are two input fields: 'Label' with the value 'LTV' and 'Key' with the value 'ltv'. Both fields have a question mark icon to their right. Below these fields is a toggle switch labeled 'Allow Agents to edit this Field', which is currently turned off. Underneath is a section titled 'Drop-down Values' containing three list items, each with a gear icon for configuration: 'less than \$100', '\$100-\$1000', and '\$1000 or more'. A '+ NEW VALUE' button is located below the list. At the bottom left, there is an 'Archive' link. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

Helpshift Custom Issue Fields (cont'd)

Examples of common Custom Issue Fields:

- Spend (LTV, Tier, Plan Type)
- Game level
- Preferred language
- Sign-up date
- Player ID
- Anything you collect on your players!

The screenshot shows the 'Custom Issue Fields' management page. At the top right is a search bar labeled 'Search Fields'. Below the title is a descriptive paragraph: 'Use Custom Issue Fields to classify Issues by assigning labels and types. Custom Issue Fields must be created before they will appear on Issues. Archiving a Custom Issue Field prevents use of that field.' There are two buttons: '+ NEW FIELD' on the left and 'EDIT ORDER' on the right. The main content is a table listing existing fields with their names and types, each with a gear icon for configuration.

Field Name	Type
LTV	Drop-down
Sign up date	Date
Customer Type	Drop-down
VIP_Test	Checkbox
payment email	Single Line Text
Preferred Language	Single Line Text
Game Level	Number

Compliance Information

COPPA (Children's Online Privacy Protection Act):

- United States federal law designed to protect the privacy of children under the age of 13
- If your app needs to be COPPA compliant, you cannot collect what COPPA refers to as personal identifiers (PIs)
- [Helpshift provides tools to assist you with COPPA compliance](#)

GDPR (The General Data Protection Regulation (GDPR)):

- Privacy and security law drafted and passed by the EU
- Helpshift is fully GDPR compliant
- We provide you with the tools for you to be compliant with your customers/players
 - ["Right to be forgotten" documentation](#)
 - Redact user data via APIs
 - Redact user data via our support team
 - [Providing customers with their personal information documentation](#)
 - Export user data via REST APIs

Compliance Information

HIPAA (The Health Insurance Portability and Accountability Act):

- US Federal law created to protect sensitive patient health information from being disclosed without the patient's consent or knowledge
- If your app needs to be HIPAA compliant, you cannot collect what COPPA refers to as personal identifiers (PIs)
- [Helpshift is a HIPAA compliant tool](#)

Helpshift Resources

Core Accounts Team

Account Executive	Assists with all commercial discussions and contract questions
Customer Success Manager	Your key point of contact for all things related to customer success and your Helpshift domain Focus Areas: Strategic guidance, customer success best practices and basic configuration recommendations

Extended Team & Resources

Helpshift Support	Fastest way to fix configuration issues, get how-to support or to troubleshoot with 1:1 help Support.helpshift.com
Helpshift Learning Center	Upcoming and on-demand webinars on both beginner and advanced topics Register here
Published Content	Events, whitepapers, case studies, ebooks, industry insights https://www.helpshift.com/resources/

In-Depth Product + Best Practice Resources

Developer Slack Community	SDK questions, technical questions, developer support https://helpshift-community.slack.com
Knowledge Base	General FAQs, configuration guides, and training https://support.helpshift.com/
Developer Docs	Technical documentation, SDK implementation https://developers.helpshift.com/
APIs	https://apidocs.helpshift.com/

Additional Paid Options

Scheduled through your **Customer Success Manager**

Professional Services	Project-based technical work completed by our Project Managers and Solution Architects Clearly defined and agreed to outcomes via problem discovery, SOW and active project management
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help*shift*

Thank you

Questions?