



OSEBO 360 · HELP DESK GUIDE

The Osebo Help Desk 360 Book

A plain-language, step-by-step guide to running a help desk on Osebo – from your categories and queues through the promises you make about response time, to the reports that tell you whether you kept them.

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- Part 2** Your people and your seats
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- Part 4** The knowledge base
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- Part 7** What it costs

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How to use this book

This guide walks you through Help Desk Support 360 – the standalone Osebo app for companies that want somewhere for their people to ask for help, and somewhere for a small team to answer. It is one of the Osebo 360 apps: a single product sold on its own, with its own signup and its own menu. You are not buying an HR platform with a help desk bolted to it.

Work through Part 1 once, in order, when you are setting up. After that you will live in Part 3, which is the day, and come back to Part 5 at the end of the week.

Every figure in this book comes from one real workspace – Kesse Logistics, code KES, on the Help Desk Support 360 plan. It has been used: 60 tickets across the whole lifecycle, 6 categories, 1 queue, 4 agents on that queue, 16 people with a login, 5 SLA policies and one invitation still outstanding. Where this book quotes a number, that number is on the screen beside it.

The big picture – a desk in three moves

However your company asks for help today, this app does three things, and the menu is organised around them:

- **Set it up.** Your categories, your queue, your business hours, the promises you make about response times, and how email reaches you. Part 1 – some of it is worth taking slowly, because your categories shape every report you will ever read.
- **Run the day.** Somebody raises a request, an agent picks it up, replies, and closes it. Parts 2 and 3 – the work that repeats.
- **Read the desk.** How many, how fast, by whom, and whether the people you serve thought it was any good. Part 5.

The one idea to hold on to: a ticket is a conversation with a state

A ticket is not a row in a list. It is a thread – the original request, every reply, every internal note, every reassignment and every change of priority – with a status on the front of it saying where the conversation has got to. Nothing in the thread is editable after the fact and nothing is deleted. When a ticket is merged into another, both survive and the trail says which way the merge went.

On this workspace those 60 tickets sit as 34 closed, 11 resolved, 6 open, 5 in progress and 4 waiting on the person who asked. That last state is the one people forget exists, and it is the difference between a desk that looks slow and a desk that is waiting for an answer.

Resolved and closed are not the same thing. Resolved means the agent believes it is done; closed means it is finished and will not reopen on a reply. The gap between the two is where a requester gets to disagree, which is why the two figures are reported separately everywhere in this app.

What you actually pay for – and why a requester is free

This is the commercial idea, and it is the one most worth understanding before you invite anybody.

A **seat** is somebody who WORKS the desk: a Help Desk Administrator or a Support Agent. A **Support Requester** – somebody who only raises tickets and follows their own – costs nothing, and always will. That is deliberate: a desk is only useful if everybody in the company can reach it, and charging per person asking for help would make rolling it out a budget decision instead of an obvious one.

On Kesse Logistics that reads as 5 seats used against 4 being billed. The difference is one invitation that has been sent to an agent and not yet accepted: it is holding a seat so the seat cannot be given away twice, but it is not on the bill until somebody actually accepts it and starts work.

★ IMPORTANT

The seat is queue membership, not the role. When somebody stops working the desk, take them off the queue – stripping the role alone leaves you paying for them. Removing a person from People & seats does both, which is why that is the button to use.

Who can do what

Three roles ship with the app, and they are the only three:

- **Help Desk Administrator** – runs the desk: settings, categories, queues, business hours, email, and every ticket.
- **Support Agent** – works tickets: replies, assigns, changes priority and closes.
- **Support Requester** – raises tickets and follows their own. Sees nobody else's.

The role is chosen when you invite somebody, and can be changed afterwards from People & seats without removing and re-inviting them.

▲ WATCH OUT

You cannot change your own role, and you cannot remove or suspend yourself. The reason is the same in each case: the only role that can undo the mistake is the one you would be giving up. If you are the only administrator, the app will refuse to demote or suspend you at all – a workspace

whose every screen renders and whose every button refuses is worse than one that simply said no.

How to read a figure

Every screenshot in this book is annotated: an arrow points at the control being discussed, a label says what it is, and the caption underneath gives the real figures from that screen.

Figures are numbered by part – Figure 3.4 is the fourth figure in Part 3.

What this app does not do

An honest manual says where the road ends. None of the following exists today, so do not go looking for it and do not promise it to anybody:

- No customer-facing portal on your own domain. Requesters sign in to the same workspace as everybody else.
- No telephony, no call logging and no chat. A ticket arrives by form or by email.
- No asset register. This is not an IT asset management system and does not track what hardware anybody has.
- No billing of tickets to a customer. Time on a ticket is not a chargeable quantity here – that is what the Client Work module does in the full platform.
- No ticket deletion. Tickets are closed or merged; the trail survives.
- No cross-workspace reporting. Each 360 workspace is its own company.

Part 1 Setting up the desk

Categories, queues, hours, promises and email – done once, before you invite anybody

Step 1. Read the dashboard before you change anything

The desk opens on its dashboard, and on a brand-new workspace it is honest about being empty. Read it once now so that the same screen means something to you later.

Do this now

1. Sign in. The app opens on SUPPORT → Dashboard (</support-centre>).
2. Read the tiles across the top: how many are open, how many are unassigned, how many have breached, and what is waiting on somebody.
3. Read the queue health panel underneath. On a new desk it is a row of zeros, which is correct.
4. Leave the filters alone for now. They are covered in Part 5.

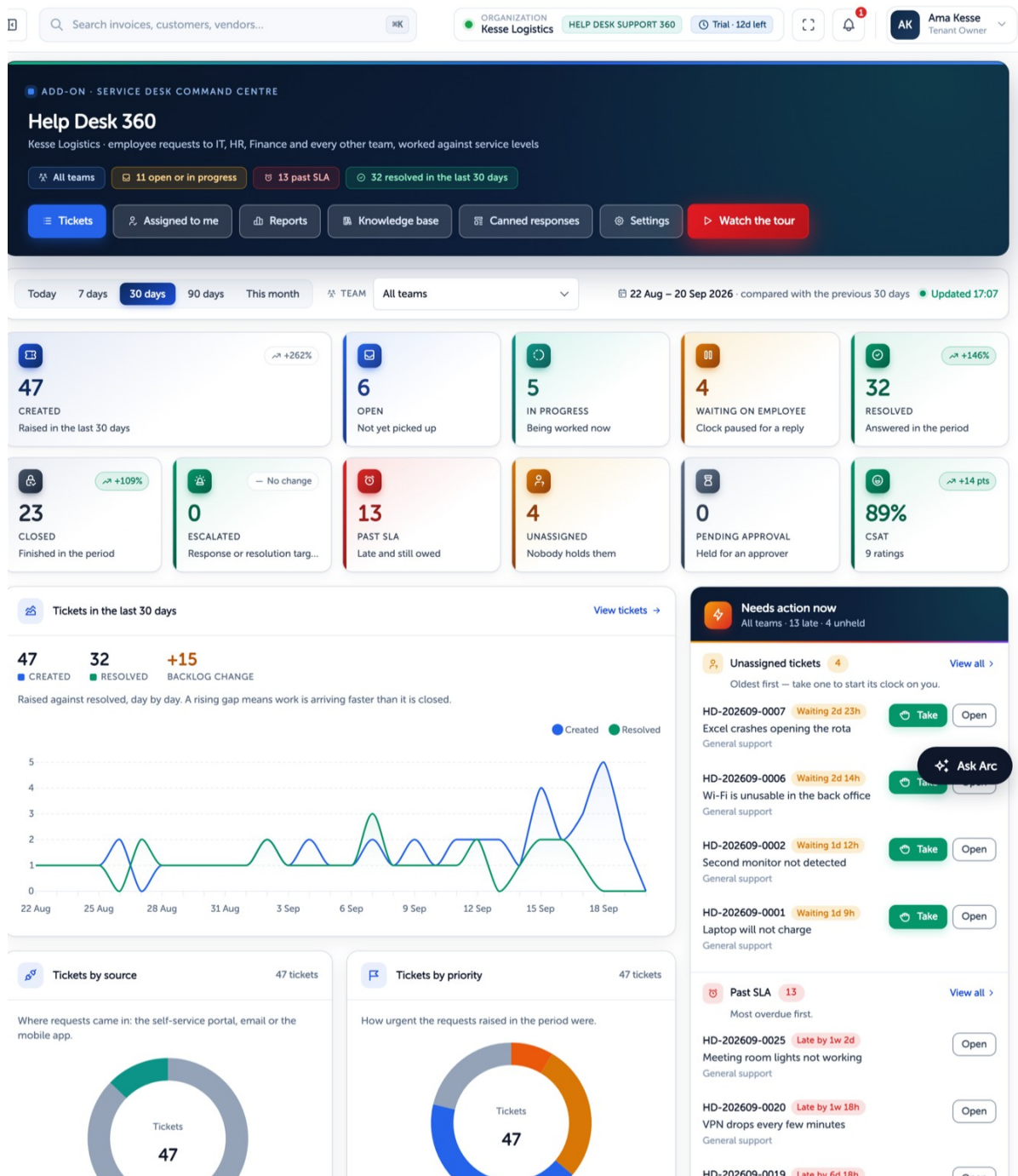


Figure 1 – The desk dashboard for Kesse Logistics, on a Help Desk Support 360 plan with 12 days of trial left.

Step 2. The workspace – your name, and who owns it

Workspace is the app's own settings page: what your desk is called, who owns the account, and what happens to the subscription. It is the one screen in the app that is about the COMPANY rather than about tickets.

Do this now

1. Open **SUPPORT** → **Workspace** (/app/workspace).

2. Check the workspace name. It is what your people see at the top of every page.
3. Note the trial state and when it ends. Nothing stops working the moment it lapses – see Step 35.
4. Leave ownership alone unless you are genuinely handing the company over.

Search invoices, customers, vendors...

ORGANIZATION Kesse Logistics HELP DESK SUPPORT 360 Trial - 12d left

AK Ama Kesse Tenant Owner

Workspace

Kesse Logistics · what you are called, where you are, and how people reach you

The desk People & seats Billing

This is your company, not your desk. MODULE GUIDE

WHAT IT IS HOW TO USE IT CONNECTED TO

Company

Company name: Kesse Logistics

Timezone: UTC

This is what your colleagues see on the desk and in the invitations you send.

Your response targets and business hours are measured in this.

Contact email: ama@kesse-logistics.test

Phone:

Website: https://

Address:

Save

Looking for something else?

Queues, hours and SLA: Inside the desk, under Settings.

Who is on the desk: People & seats.

Your plan and invoices: Billing.

26 © Help Desk Support 360. Designed & Developed By Marvalinks Digital

Figure 2 – Workspace – the one screen about the company rather than about tickets.

Step 3. Categories – the decision that shapes every report

A category is what a request is ABOUT. It is also the axis every report in Part 5 is grouped by, so the six you choose now are the six you will be reading about in six months. Choose few and broad rather than many and precise.

Do this now

1. Open **SUPPORT** → **Settings** → Categories (</support-centre/settings/categories>).

2. Read the six on this workspace, in the order they appear: Laptops & devices, Access & accounts, Network & connectivity, Software & licences, Facilities, and Other.
3. Add or rename to match how your company actually talks. Drag to reorder – the order here is the order a requester sees.
4. Deactivate rather than delete anything you stop using. Old tickets keep their category.

HELP DESK 360 · SETTINGS

Categories, forms & approvals

Kesse Logistics · what employees pick when they raise a request, which team it goes to, what it asks and who approves it

6 offered to employees | 0 with a form | 0 need approval

[+ New category](#)

6	0	0	0
CATEGORIES 0 switched off	CUSTOM FORMS ask their own questions	APPROVAL CHAINS approved before the desk starts	CONFIDENTIAL seen by their own team only

← Help Desk 360 | Overview | General 6/8 | Queues & agents 1 | Business hours 1 | SLA targets 5/5 | **Categories, forms & approvals 6**

Automation rules 0 | Email addresses 0 | Email capture log 0

Employees choose only from the active categories below, in this order. The built-in list is no longer offered.

Categories 6 | EMPLOYEES SEE THIS ORDER | [+ New category](#)

ORDER	CATEGORY	QUEUE	DEFAULT PRIORITY	FIELDS	APPROVAL STEPS	HANDLING	STATUS	ACTIONS
1	Laptops & devices Anything you hold, carry or plug in.	Default queue	Medium	0	0	Standard	Active	>
2	Access & accounts Passwords, permissions and the systems you cannot get into.	Default queue	High	0	0	Standard	Active	>
3	Network & connectivity Wi-Fi, VPN and the internet being the internet.	Default queue	High	0	0	Standard	Active	>
4	Software & licences Installs, updates and the thing that stopped opening.	Default queue	Medium	0	0	Standard	Active	>
5	Facilities The building: lights, doors, heat, the second-floor printer.	Default queue	Low	0	0	Standard	Active	>
6	Other Everything that is none of the above.	Default queue	Medium	0	0	Standard	Active	>

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Designed & Developed By Marvalinks Digital

Figure 3 – Six categories, in the display order somebody chose for them, with “Other” deliberately last.

✓ TIP

Keep an “Other” and watch it. If it becomes your biggest category, your list is wrong – people are not finding themselves in it. That is the single most useful thing the category report tells you.

Step 4. Custom fields on a category

A category can ask for more than a description. A laptop fault is more useful with a serial number on it; an access request is more useful with the system named.

Do this now

1. From Categories, open one and choose Fields.
2. Add the one or two things an agent always has to ask for anyway.
3. Drag to reorder. Mark a field required only if a request is genuinely useless without it.

HELP DESK 360 · SETTINGS · CATEGORY

Laptops & devices

Kesse Logistics · Anything you hold, carry or plug in.

Offered to employees Default queue

Categories Edit details Switch off

0 QUESTIONS
0 required

0 APPROVAL STEPS
none

Medium
DEFAULT PRIORITY
prefilled on the form

Standard
VISIBILITY
whole desk

Help Desk 360 Overview General 6/8 Queues & agents 1 Business hours 1 SLA targets 5/5 Categories, forms & approvals 6

Automation rules 0 Email addresses 0 Email capture log 0

Details Edit details

NAME	QUEUE	DEFAULT PRIORITY	ICON	CONFIDENTIAL	REQUIRES APPROVAL
Laptops & devices	Default queue	Medium	Default tag	No	No

REQUIRED SKILLS
None — any agent on the queue

DESCRIPTION
Anything you hold, carry or plug in.

Form: the questions this category asks 0

ASKED AFTER THE DESCRIPTION + Add question

ORDER	QUESTION	ANSWER TYPE	REQUIRED	ASKED WHEN	ACTIONS
-------	----------	-------------	----------	------------	---------

Ask Arc

Figure 4 – Inside a category: the fields it asks for, and the approval steps that must clear before an agent may work it.

▲ WATCH OUT

Every required field is a reason somebody gives up and walks over to your desk instead. Two required fields is a form; six is an obstacle.

Step 5. Approvals on a category

Some requests should not be actioned on the agent's say-so – new software that costs money, access to something sensitive. A category can require approval before work starts.

Do this now

1. From Categories, open one and choose Approvals.
2. Add the step and say who approves: a named person, or the requester's line manager.
3. Save. From now on a ticket in that category waits for a decision before an agent can work it.
4. Approvers see what is waiting under SUPPORT → Approvals (</app/approvals>).

♦ GOOD TO KNOW

An approval is a decision, not a message. It is recorded on the ticket with who decided and when, and it cannot be edited afterwards – the correction is another decision, not a rewrite.

Step 6. Queues – where tickets land

A queue is a group of agents who share incoming work. A small desk needs exactly one, and this workspace has one: General support, with four agents on it.

Do this now

1. Open **SUPPORT** → **Settings** → Queues (</support-centre/settings/queues>).
2. Read the queue and its agents.
3. Add a second queue only when two groups of people genuinely do not cover for each other. Two queues on a four-person desk make work disappear.
4. Deactivate a queue rather than deleting it.

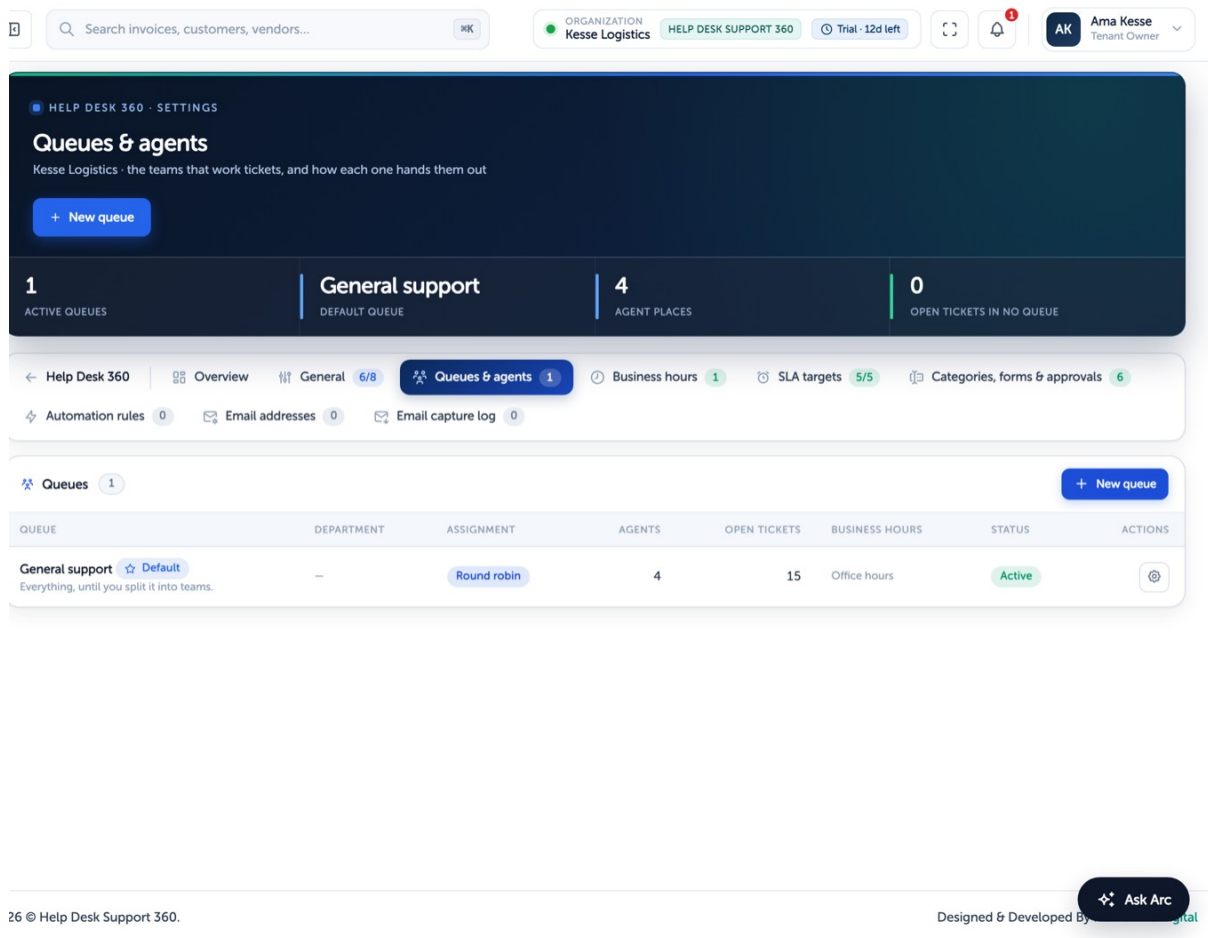


Figure 5 – One queue, General support, with four agents on it. Queue membership is the seat.

★ IMPORTANT

Queue membership IS the seat. Adding somebody to a queue is the act that takes one, and it is checked against your plan at that moment. If you are at your ceiling the app refuses and tells you the number.

Step 7. Business hours

Your promises about response time only make sense against the hours you actually work. A four-hour promise made at 4.55pm on a Friday should not breach at 8.55pm.

Do this now

1. Open **SUPPORT** → **Settings** → Business hours (</support-centre/settings/business-hours>).
2. Set the days and times your desk is staffed, and your timezone.
3. Save. Every SLA clock in the app now stops outside these hours.

HELP DESK 360 · SETTINGS

Business hours

Kesse Logistics - when the SLA clock runs

+ New schedule

1 SCHEDULES | Office hours DEFAULT SCHEDULE | UTC YOUR TIMEZONE | 1 QUEUES WITH THEIR OWN HOURS

← Help Desk 360 | Overview | General 6/8 | Queues & agents 1 | **Business hours 1** | SLA targets 5/5 | Categories, forms & approvals 6

Automation rules 0 | Email addresses 0 | Email capture log 0

ⓘ A queue uses its own schedule, else the default schedule ("Office hours"), else the built-in hours: 08:00–17:00 on Monday, Tuesday, Wednesday, Thursday, Friday (your weekend settings), in UTC, stopping on public holidays.

ⓘ Schedules 1 + New schedule

SCHEDULE	HOURS	TIMEZONE	HOLIDAYS	USED BY	ACTIONS
Office hours ☆ Default	Mon–Fri 09:00–17:00	Your timezone (UTC)	Clock stops	General support	Edit Delete

26 © Help Desk Support 360. Designed & Developed By Ask Arc

Figure 6 – Business hours. Every SLA clock in the app stops outside these, which is why this screen comes before the next one.

Step 8. SLA policies – the promises

An SLA policy says how quickly you will first respond and how quickly you will resolve, by priority. This workspace has five.

Do this now

1. Open Settings and find the SLA policies.
2. Read the five and the priorities they attach to: urgent, high, medium and low all behave differently on this desk.
3. Set targets you can actually keep. An SLA you breach every week teaches your desk to ignore the colour red.

Search invoices, customers, vendors...

KK

ORGANIZATION Kesse Logistics

HELP DESK SUPPORT 360

Trial - 12d left

AK Ama Kesse Tenant Owner

HELP DESK 360 · SETTINGS

SLA targets

Kesse Logistics · how soon each priority gets a first answer, and how soon it is resolved

5/5 ORGANISATION-WIDE TARGETS SET

0 QUEUE OVERRIDES

1 ACTIVE QUEUES

0.25 h SHORTEST TARGET ALLOWED

Help Desk 360

Overview

General 6/8

Queues & agents 1

Business hours 1

SLA targets 5/5

Categories, forms & approvals 6

Automation rules 0

Email addresses 0

Email capture log 0

Enter targets in **hours** (1.5 is an hour and a half). A blank cell inherits the value shown in grey: a queue inherits the organisation-wide target, and the organisation inherits the built-in one. **Business hours only** counts time on the queue's schedule; untick it for a clock that runs round the calendar. Changes apply to tickets raised from now on.

Organisation-wide 5 set

Applies to every ticket unless its queue sets its own target below.

PRIORITY	FIRST RESPONSE (HOURS)	RESOLUTION (HOURS)	BUSINESS HOURS ONLY	SOURCE
Low	16	40	☒ Working time	Set here
Medium	8	24	☒ Working time	Set here
High	4	16	☒ Working time	Set here
Urgent	2	8	☒ Working time	Set here
Critical	1	4	☒ Working time	Set here

General support (default) 0 set

Overrides the organisation-wide target for tickets in this queue only.

PRIORITY	FIRST RESPONSE (HOURS)	RESOLUTION (HOURS)	BUSINESS HOURS ONLY	SOURCE
Low	16	40	☒ Working time	Organisation-wide: 16 h / 40 h
Medium	8	24	☒ Working time	Organisation-wide: 8 h / 24 h
High	4	16	☒ Working time	Organisation-wide: 4 h / 16 h
Urgent	2	8	☒ Working time	Organisation-wide: 2 h / 8 h
Critical	1	4	☒ Working time	Organisation-wide: 1 h / 4 h

▲ WATCH OUT

Step 9. Email – letting people raise tickets without signing in

Most requests never get typed into a form. They arrive as an email to a support address, and this is where that address is connected.

Do this now

1. Open **SUPPORT** → **Settings** → Email (</support-centre/settings/email>).
2. Add your sending domain and verify it. Until it is verified, mail from the desk will be filtered by the recipient, not by you.
3. Point a queue at an inbound address.
4. Send a test from outside the company and watch it arrive under Inbound emails.

Search invoices, customers, vendors...

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HELP DESK 360 · SETTINGS

Email addresses

Kesse Logistics · mail sent to a queue's address becomes a ticket in that queue

Email capture log

0 QUEUES TAKING EMAIL | 0 LIVE ADDRESSES | Not set up YOUR HELP DOMAIN | 0 FORWARDING CONFIRMATIONS

Help Desk 360 Overview General 6/8 Queues & agents 1 Business hours 1 SLA targets 5/5 Categories, forms & approvals 6

Automation rules 0 Email addresses 0 Email capture log 0

RECEIVING ON THIS INSTALLATION

Not configured

An operator must set RESEND_API_KEY, RESEND_INBOUND_DOMAIN, RESEND_INBOUND_WEBHOOK_SECRET on this installation.

RESEND_API_KEY RESEND_INBOUND_DOMAIN RESEND_INBOUND_WEBHOOK_SECRET

YOUR SENDING DOMAIN

Not set up

Your own help domain is built on a verified sending domain.

Set up your sending domain

YOUR HELP DOMAIN

Not set up

Available after your sending domain is verified.

Receive at your own domain

Email receiving is not configured on this installation, so mail sent to a help desk address cannot reach your queues right now. You can still choose each queue's address below — they go live as soon as receiving is configured. Tickets raised in the app are unaffected.

An email to a queue's address opens a ticket in that queue — routed and assigned by the queue's own rules — or is added as a reply when the requester answers a ticket email (its reply address is unique to that ticket!). Only mail from your active employees, whose mail server vouches for them, is accepted; anything else is recorded in the Email capture log.

Queue addresses 1

Queues & agents

QUEUE	EMAIL CAPTURE	ADDRESSES	LAST EMAIL
General support	Off	Set an address	None yet
Default			

Receive at your own domain

Email domain verification is not configured on this installation, so a help domain cannot be set up or checked right now. Your queue addresses and tickets are unaffected.

Give your queues addresses on your own domain — `it-service-desk@help.yourcompany.com` instead of the platform address. This is built on your Sending Domain: once your company domain is verified for sending, you can add a help subdomain here in a couple of minutes.

- 1 Verify a sending domain — not set up yet.
- 2 Set up `help.yourcompany.com` — publish one MX record for the subdomain.
- 3 Your queues answer on it — replies to ticket emails come back to it too.

Set up your sending domain

Forward an existing mailbox

Figure 8 – Email. The sending domain must be verified here before you tell anybody the address.

▲ WATCH OUT

Verify the domain before you tell anybody the address. Unverified mail is the single most common reason a desk's replies end up in a junk folder and the desk gets blamed for not answering.

Step 10. Canned responses

The same answer typed four hundred times is four hundred chances to type it differently. A canned response is a reply you keep.

Do this now

1. Open **SUPPORT** → **Canned responses** (/support-centre/canned-responses).
2. Write the five you already know you need – password reset, VPN, printer, new starter, and “we need more detail”.
3. On a ticket, pick one from the reply box and edit before sending. It is a starting point, not a robot.

Reply templates
Kesse Logistics · save the answers you give most and drop them into any reply

← Help Desk 360 Ticket queue + New template

0 TEMPLATES YOU CAN USE | 0 YOURS | 0 SHARED WITH THE DESK | 0 SWITCHED OFF

Reply templates MODULE GUIDE

WHAT IT IS
Ready-made wording for the replies you send again and again — password resets, payslip queries, 'we are looking into it'. Each one fills in the ticket's details for you.

HOW TO USE IT
Save a template with New template, then on any ticket use Insert template above the reply box. Placeholders such as the requester's first name and the due date are written in as it is inserted, and you can still edit the text before sending.

CONNECTED TO
Part of the Help Desk 360 add-on — offered from the reply box on every ticket you can open.
Help Desk 360 Ticket queue

FIND A TEMPLATE
Search titles and wording... Everyone who can use it
Apply Reset

Templates 0

No templates yet
Write the reply you send most often — it will be offered on every ticket you work.
+ New template

Placeholders

- Written in from the ticket when you insert the template. Anything else in double braces is left exactly as you typed it.
- {{requester_first_name}}** Ama
First name of the person who raised it
- {{requester_name}}** Ama Owusu
Full name of the person who raised it
- {{ticket_no}}** SUP-ACME-202609-0042
Ticket number
- {{subject}}** Laptop will not start
Ticket subject
- {{agent_name}}** Kofi Mensah
Your name
- {{queue}}** IT support
The team working it
- {{resolution_due}}** 22 Sep
When it is due to be resolved — a time only while that is still ahead; otherwise "as soon as we can", 2026
"once we hear back from you" or "already resolved" 14:00

Example: "Hi {{requester_first_name}}, {{ticket_no}} is with {{queue}}. Timing: {{resolution_due}}. — {{agent_name}}"

Figure 9 – Canned responses – empty on this workspace, which is the state most desks start in and few should stay in.

Part 2 Your people and your seats

Who is on the desk, who may ask, and what each of them costs

Step 11. People & seats

One screen holds everybody in the workspace, what they may do, and what you are paying for.

Do this now

1. Open **SUPPORT** → **People & seats** (</app/people>).
2. Read the seat figures at the top: 5 used, 4 billed. The difference is the outstanding invitation.
3. Read the list. 16 people have a login here; only the four on the queue cost anything.
4. Read the invitations table underneath – who has been asked, and whether they have accepted.

HELP DESK SUPPORT 360

People & seats

Kesse Logistics - who works the desk, and who can ask it for help

The desk | My requests | Billing

4 AGENT SEATS BEING WORKED | **16** PEOPLE IN THIS WORKSPACE | **1** HELD BY INVITATIONS

Everybody can ask. Only the desk costs a seat.

Invite somebody

Their work email: Joining as: **Help Desk Administrator** — Runs the desk: settings, queues and every t... **Send invitation**

Help Desk Administrator - uses a seat | Support Agent - uses a seat | Support Requester - free

In this workspace (16)

NAME	EMAIL	HOLDS	ACTIONS
Abena Owusu	abena.owusu@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Adwoa Boateng	adwoa.boateng@kesse-logistics.test	SUPPORT AGENT	Edit Suspend Remove
Afia Bonsu	afia.bonsu@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Akosua Mensah	akosua.mensah@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Ask Arc
Akua Danso	akua.danso@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Ama Kesse	ama@kesse-logistics.test	TENANT OWNER ARC USER HELP DESK ADMINISTRATOR	This is you
Ama Nyarko	ama.nyarko@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Esi Appiah	esi.appiah@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Fifi Quartey	fiifi.quartey@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Kofi Antwi	kofi.antwi@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Kojo Asante	kojo.asante@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Kwabena Osei	kwabena.osei@kesse-logistics.test	SUPPORT AGENT	Edit Suspend Remove

Figure 10 – People & seats: 16 people hold a login, 5 seats are in use and 4 are billed. The difference is one invitation that has been sent and not yet accepted.

Step 12. Invite somebody

Everybody arrives the same way: by invitation, with a role chosen at that moment.

Do this now

1. Press Invite and give an email address.
2. Choose the role. Administrator and Agent take a seat; Requester does not.

3. Send. They get a link, choose their own password, and land in the workspace.
4. If they have not accepted, use Resend. If they never will, Revoke – that gives the seat straight back.

HELP DESK SUPPORT 360

People & seats

Kesse Logistics · who works the desk, and who can ask it for help

[The desk](#) [My requests](#) [Billing](#)

4 AGENT SEATS BEING WORKED | NO SEAT COUNT SET | 16 PEOPLE IN THIS WORKSPACE | 1 HELD BY INVITATIONS

Everybody can ask. Only the desk costs a seat.

Invite somebody

Their work email:

Joining as: Help Desk Administrator — Runs the desk: settings, queues and every t...

Help Desk Administrator 1 seat Support Requester · free

In this workspace 16

NAME	EMAIL	HOLDS	ACTIONS
Abena Owusu	abena.owusu@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Adwoa Boateng	adwoa.boateng@kesse-logistics.test	SUPPORT AGENT	Edit Suspend Remove
Afia Bonsu	afia.bonsu@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Remove
Akosua Mensah	akosua.mensah@kesse-logistics.test	SUPPORT REQUESTER	Edit Suspend Ask Arc

Figure 11 – Inviting somebody. The role is chosen here, and it decides whether a seat is spent: Administrator and Agent cost one, Requester never does.

♦ GOOD TO KNOW

Nobody is ever given a password by somebody else. The invitation link lets a person set their own, which means no administrator ever knows it and no password has to be communicated.

Step 13. Change what somebody may do

People move. An agent becomes the person who runs the desk; somebody leaves the team but stays in the company.

Do this now

1. On People & seats, press Edit on their row.
2. Correct their name, or move them to a different role.

3. Save. Moving somebody INTO Agent or Administrator seats them on the desk; moving them out releases the seat.

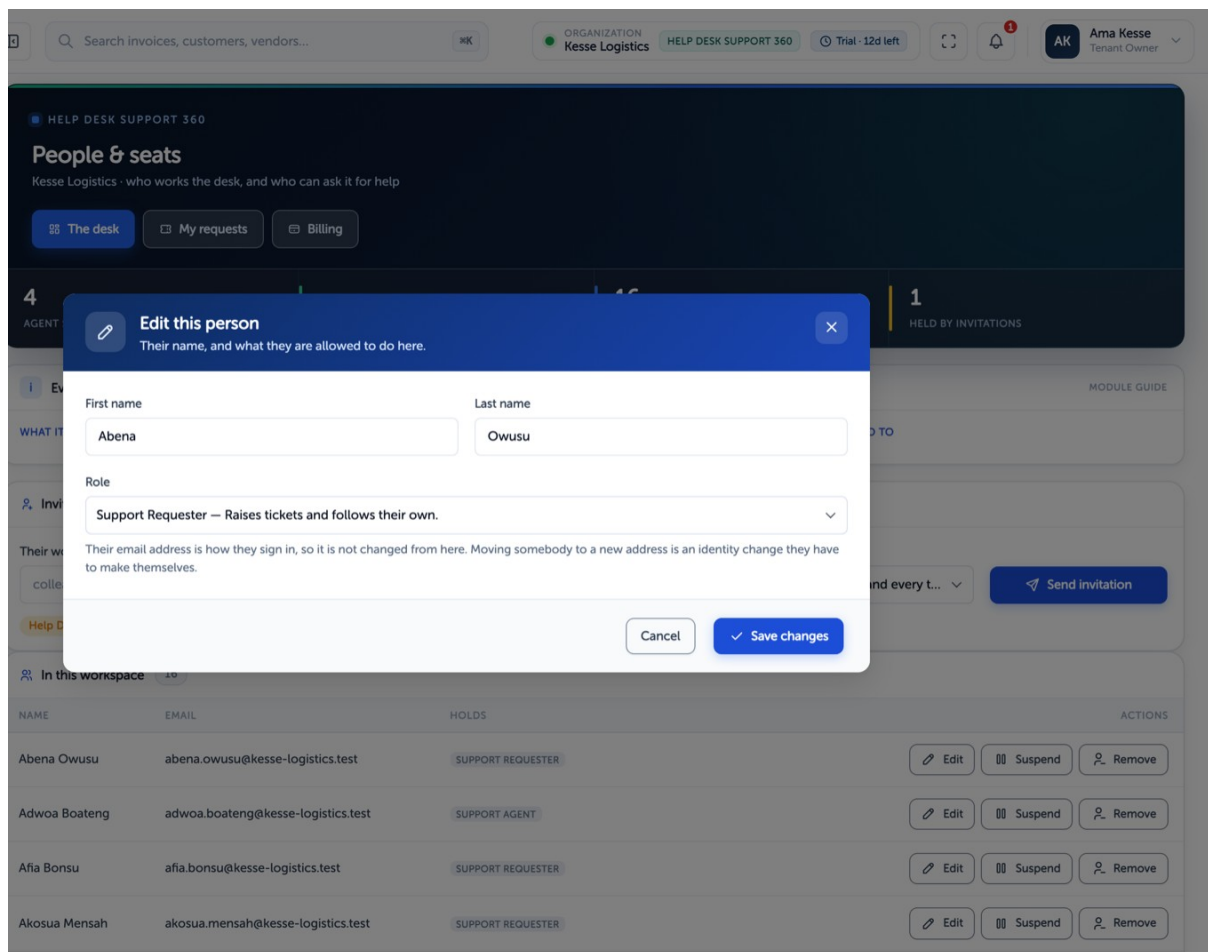


Figure 12 – Editing a person. The role can be changed without removing and re-inviting them; the email address cannot, because it is how they sign in.

▲ WATCH OUT

Their email address is not editable here, and that is deliberate rather than missing. It is how they sign in, so changing it from an admin screen would move an account to an address its holder may not control.

Step 14. Suspend, and remove

Two different things, for two different situations, and the difference is money.

Do this now

1. **Suspend** somebody who is coming back – extended leave, or under investigation. They cannot sign in; they keep their role and their place; and their seat is still in use.

2. **Remove** somebody who has left. Every role is stripped, the account is closed, and the seat comes back.
3. Everything either of them ever wrote stays exactly where it is, on every ticket.

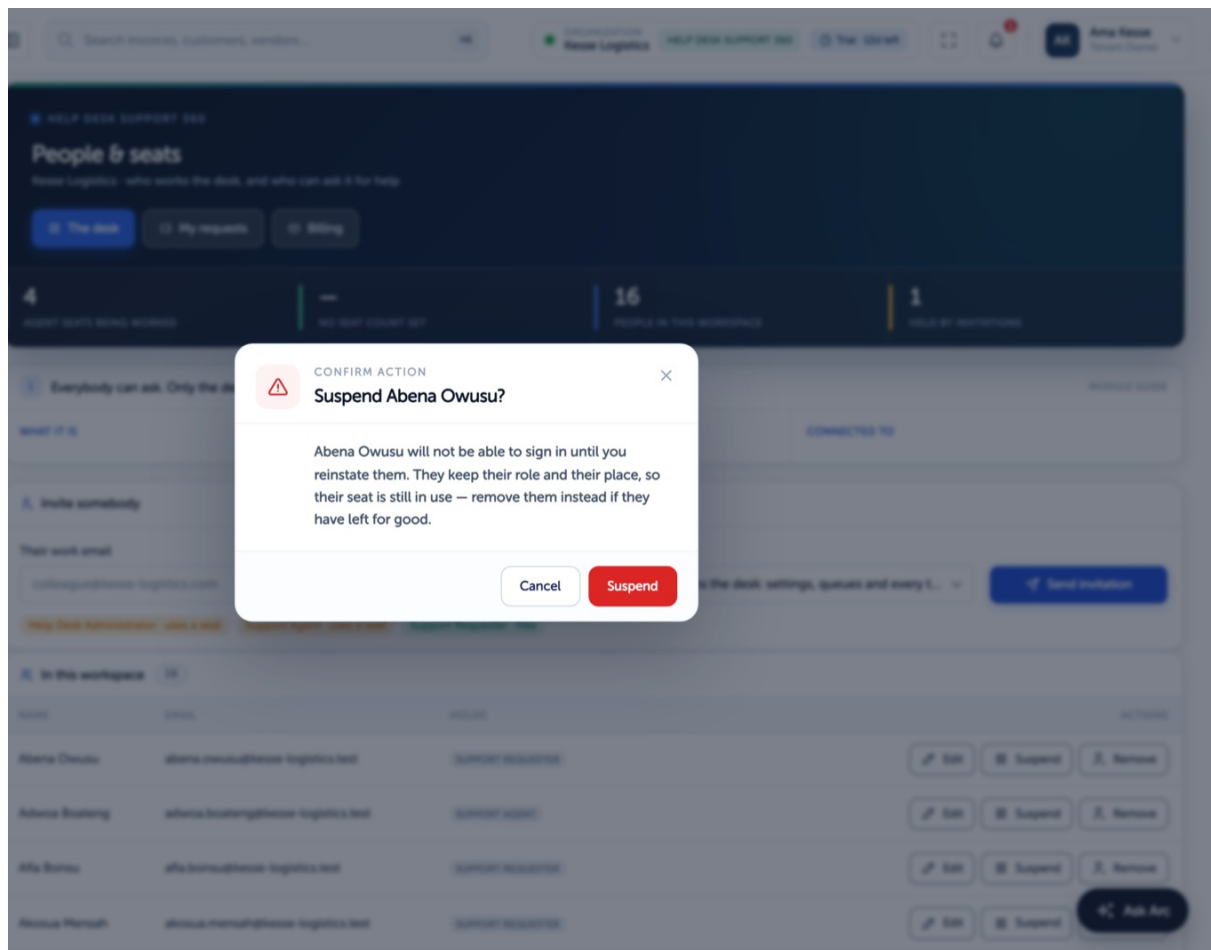


Figure 13 – Suspending somebody. The confirmation says plainly that the seat stays in use – suspension is for somebody coming back, removal is for somebody who has gone.

★ IMPORTANT

Suspension holds the seat, and the confirmation says so. If somebody has gone for good, remove them – suspending your way through a departure is how a desk of four ends up paying for seven.

Part 3 Running the day

Raise it, pick it up, answer it, finish it

Step 15. Raise a request

This is the screen most of your company will ever see, and most of them will only ever see this one.

Do this now

1. Open **SUPPORT** → **My requests** (/app/tickets).
2. Press New request.
3. Pick a category. Any custom fields on it appear as you choose.
4. Describe the problem and send. You now have a number and a thread.

The screenshot shows the 'Raise a request' form in the Help Desk Support 360 application. The form is titled 'Raise a request' and includes a sub-header 'Tell the desk what you need. You can add more once it is open.' Below the title is a button labeled 'My requests'. The form is divided into three main sections: 'What do you need?', 'What is it about', and 'What has happened'. The 'What do you need?' section has a dropdown menu with 'Laptops & devices' selected. The 'What is it about' section has a text input field with the placeholder text 'The printer on the second floor is jammed'. The 'What has happened' section has a text input field with the placeholder text 'When it started, what you were doing, anything you have already tried.' At the bottom right of the form are two buttons: 'Send it' and 'Cancel'. The top of the application shows a navigation bar with a search bar, a user profile 'AK Ama Kesse Tenant Owner', and a trial status 'Trial - 12d left'.

Figure 14 – Raising a request. The category is chosen first, because any custom fields on it appear as you choose.

ORGANIZATION
Kesse Logistics

HELP DESK SUPPORT 360

Trial - 12d left

AM Akosua Mensah
Support Requester

HELP DESK SUPPORT 360

My requests

Kesse Logistics - everything you have asked the desk, and where each one has got to

+ Raise a request

Approvals

5

RAISED BY ME

3

STILL OPEN

0

WAITING ON YOU

My requests 5

+ Raise

REFERENCE	SUBJECT	STATUS	WITH	LAST ACTIVITY
HD-202609-0001	Laptop will not charge	open	Not picked up yet	1 day ago
HD-202609-0013	Shared drive is read-only	in_progress	Kwabena Osei	4 days ago
HD-202609-0025	Meeting room lights not working	in_progress	Kwabena Osei	1 week ago
HD-202609-0037	Excel crashes opening the rota	closed	Kwabena Osei	2 weeks ago
HD-202608-0049	New starter needs accounts	closed	Kwabena Osei	1 month ago

26 © Help Desk Support 360.

Designed & Developed By Marvalinks Digital

Figure 15 – The same workspace seen by a Support Requester: their own requests, and nobody else's.

Step 16. The agent's view of the day

An agent opens the dashboard and needs to know what is theirs, what is nobody's, and what is about to go wrong.

Do this now

1. Open the Dashboard.
2. Read unassigned first – a ticket nobody owns is the only genuinely urgent state on a desk.
3. Read breached and approaching next.
4. Then open Assigned to me (</support-centre/assigned>).

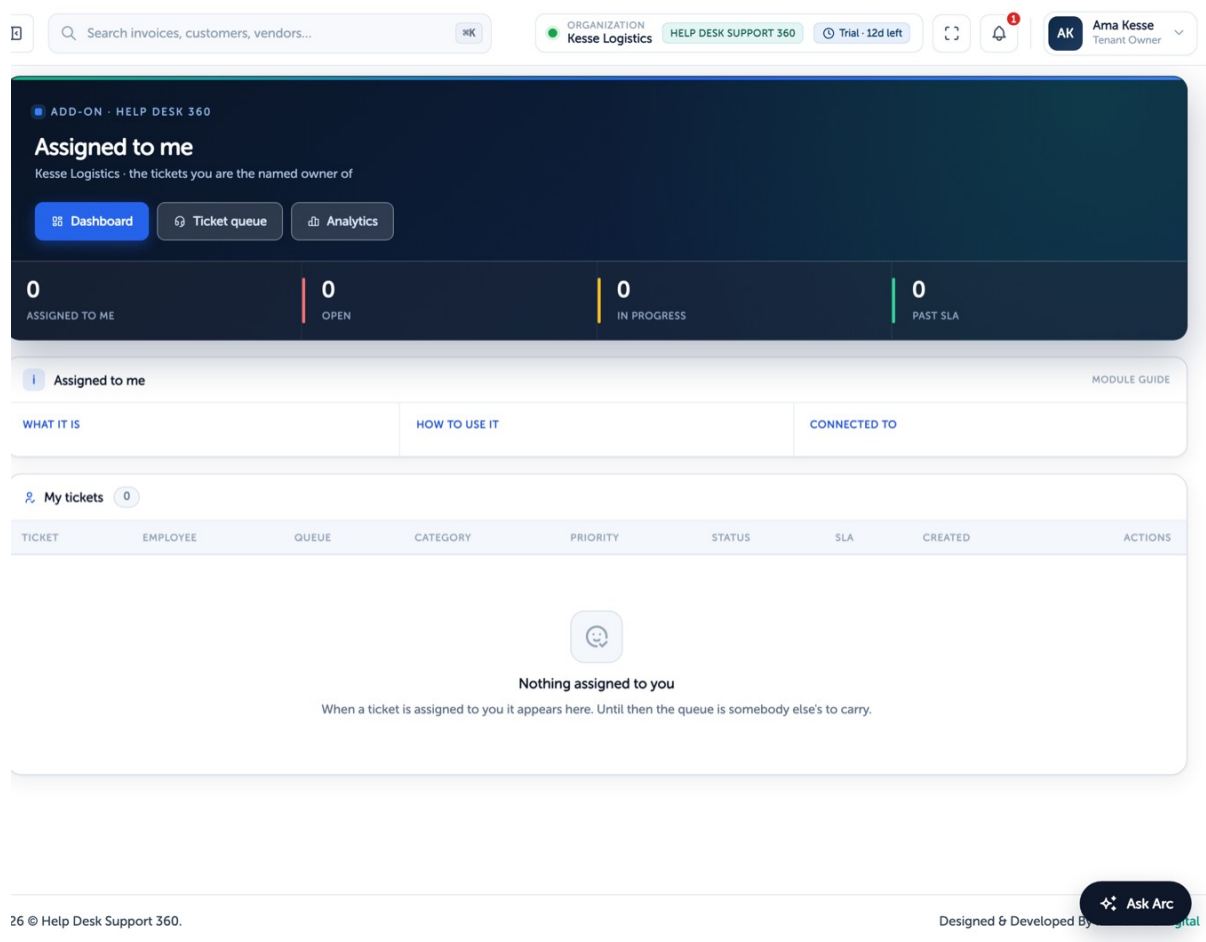


Figure 16 – Assigned to me – an agent's own queue.

✓ TIP

Work unassigned before you work your own. A ticket in your name is somebody's problem being handled; a ticket in nobody's name is somebody's problem being ignored, and it is the one the requester is currently telling their colleagues about.

Step 17. Work a ticket

Everything about one request is on one page: the thread, the state, and every action.

Do this now

1. Open a ticket from the dashboard or a queue.
2. Read the thread from the top. The original request is the first entry and cannot be edited by anybody.
3. Use Assign to take it, or to hand it to the right person.
4. Change priority if the requester undersold it – most people do.



Step 18. Reply, and the note nobody outside sees

Do this now

- 28

HELP DESK 360 · TICKET WORKSPACE

HD-202609-0001 Email

Laptop will not charge

Unknown requester Created 19 Sep 2026 07:16 General support Laptops & devices

Open Low priority SLA on track

Tickets Reply

Open STATUS	Low PRIORITY	Unassigned ASSIGNED TO	1 MESSAGES 0 internal notes	0m TIME SPENT	0 WATCHERS
----------------	-----------------	---------------------------	-----------------------------------	------------------	---------------

Original request 19 Sep 2026 07:16

It stopped charging overnight. The light on the adapter is off and swapping the cable made no difference.

Laptops & devices 1 message 0 internal notes Last message 19 Sep 2026 07:16

Conversation 1 total message(s)

Akosua Mensah Support team 19 Sep 2026 07:16

It stopped charging overnight. The light on the adapter is off and swapping the cable made no difference.

Add response

Set up reply templates Mention

Properties HD-202609-0001

PRIORITY Low	STATUS Open
REQUEST TYPE Laptops & devices	TEAM General support
ASSIGNED TO Nobody yet	SERVICE LEVEL On track
CHANNEL Email	CC / WATCHERS 0 people
CREATED 19 Sep 2026 07:16	LAST ACTIVITY 1 day ago

Actions

Change priority Ask a colleague Ask Arc

Figure 18 – One ticket. The whole thread is here – the original request, every reply, every internal note – and nothing in it can be edited after the fact.

▲ WATCH OUT

Read the label above the box before you type. An internal note written as a reply is a message your colleague expected to be private arriving in a requester's inbox, and there is no unsend.

Step 19. Waiting on somebody

Half of a desk's apparent slowness is time spent waiting for an answer nobody chased.

Do this now

1. When you have asked the requester something, set the status to **Pending employee**.
2. The SLA clock stops. The ticket stops counting against you and starts counting against the question.
3. On this workspace, 4 of the 60 tickets are in exactly that state.

Step 20. Consult a colleague

Bringing somebody in without handing the ticket over.

Do this now

1. Use Consult on the ticket and name the colleague.
2. They can read and comment; the ticket stays assigned to you.
3. Use this instead of reassigning when you want an opinion rather than a handover.

Step 21. Merge duplicates

Three people report the same outage. One ticket should carry the answer.

Do this now

1. Open the duplicate and choose Merge.
2. Name the ticket it belongs to.
3. Both remain, linked, and everybody who asked gets the answer.

♦ GOOD TO KNOW

Nothing is deleted by a merge, in either direction. The duplicate keeps its number and its requester, so the person who raised it can still find what happened to their question.

Step 22. Resolve, and close

Two steps on purpose.

Do this now

1. **Resolve** when you believe it is done. The requester is told and gets the chance to disagree.
2. **Close** when it is finished. On this workspace 11 are resolved and 34 are closed.
3. A reply on a resolved ticket brings it back. A reply on a closed one starts a new conversation.

Part 4 The knowledge base

Answering the question once

Step 23. Read what is there

Every desk answers the same ten questions for ever. The knowledge base is where the tenth answer stops being retyped.

Do this now

1. Open **SUPPORT** → **Knowledge** (/support-centre/knowledge).
2. Search for something you answered twice last week.
3. If it is not there, that is the article to write next.

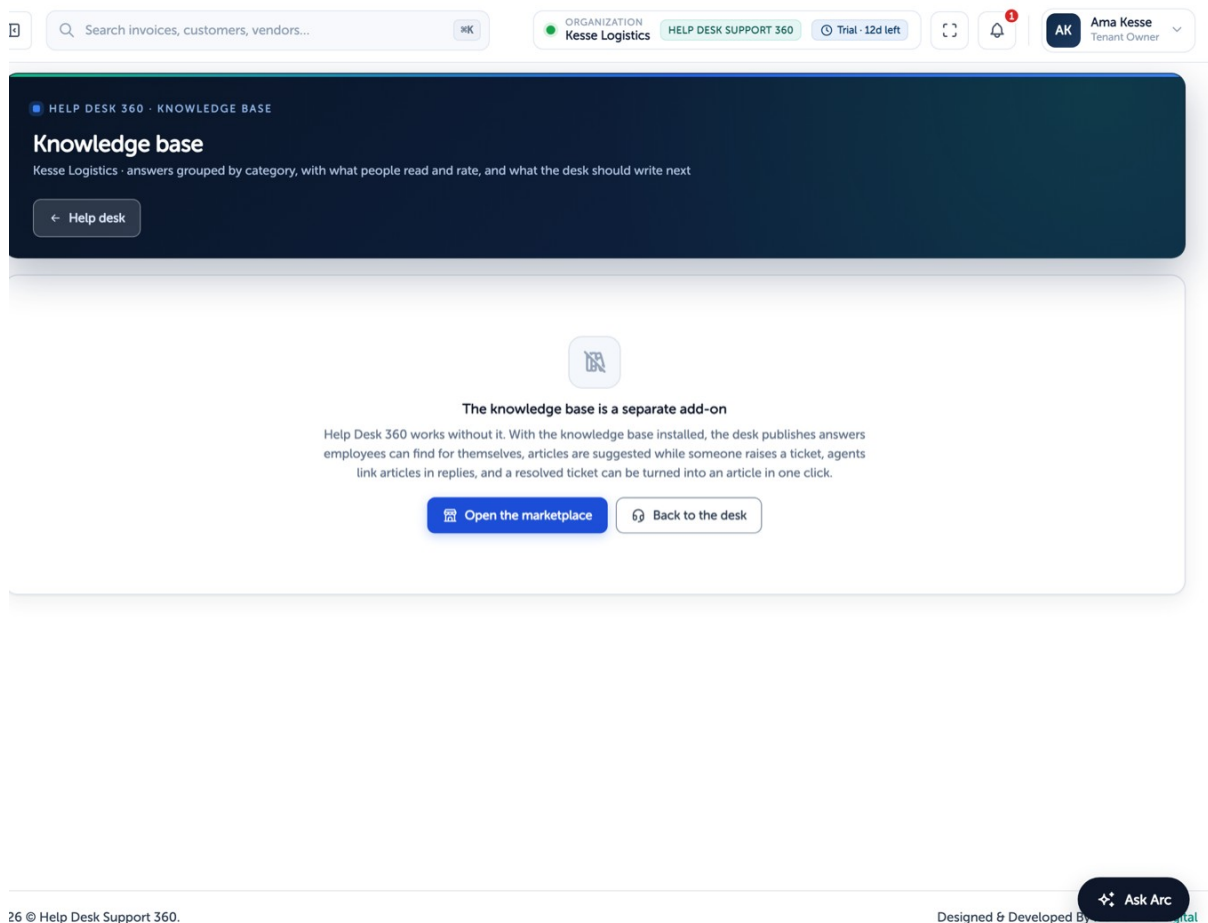


Figure 19 – The knowledge base. An empty search here is the article you should write next.

Step 24. Write an article from a ticket

The best articles are written the moment a good answer has just been given, because that is the only moment somebody knows the whole answer.

Do this now

- 1.** Finish the ticket properly first.
- 2.** Open Knowledge and write the article from the reply you just sent.
- 3.** Link it in your next reply on the same subject rather than retyping.

Part 5 Reading the desk

How many, how fast, by whom, and whether it was any good

Step 25. The reports centre

Everything the desk knows about itself, in one place.

Do this now

1. Open **SUPPORT** → **Reports** (</support-centre/reports>).
2. Read the four: volume, agents, SLA and satisfaction.
3. Set the date range once at the top – every report obeys it.

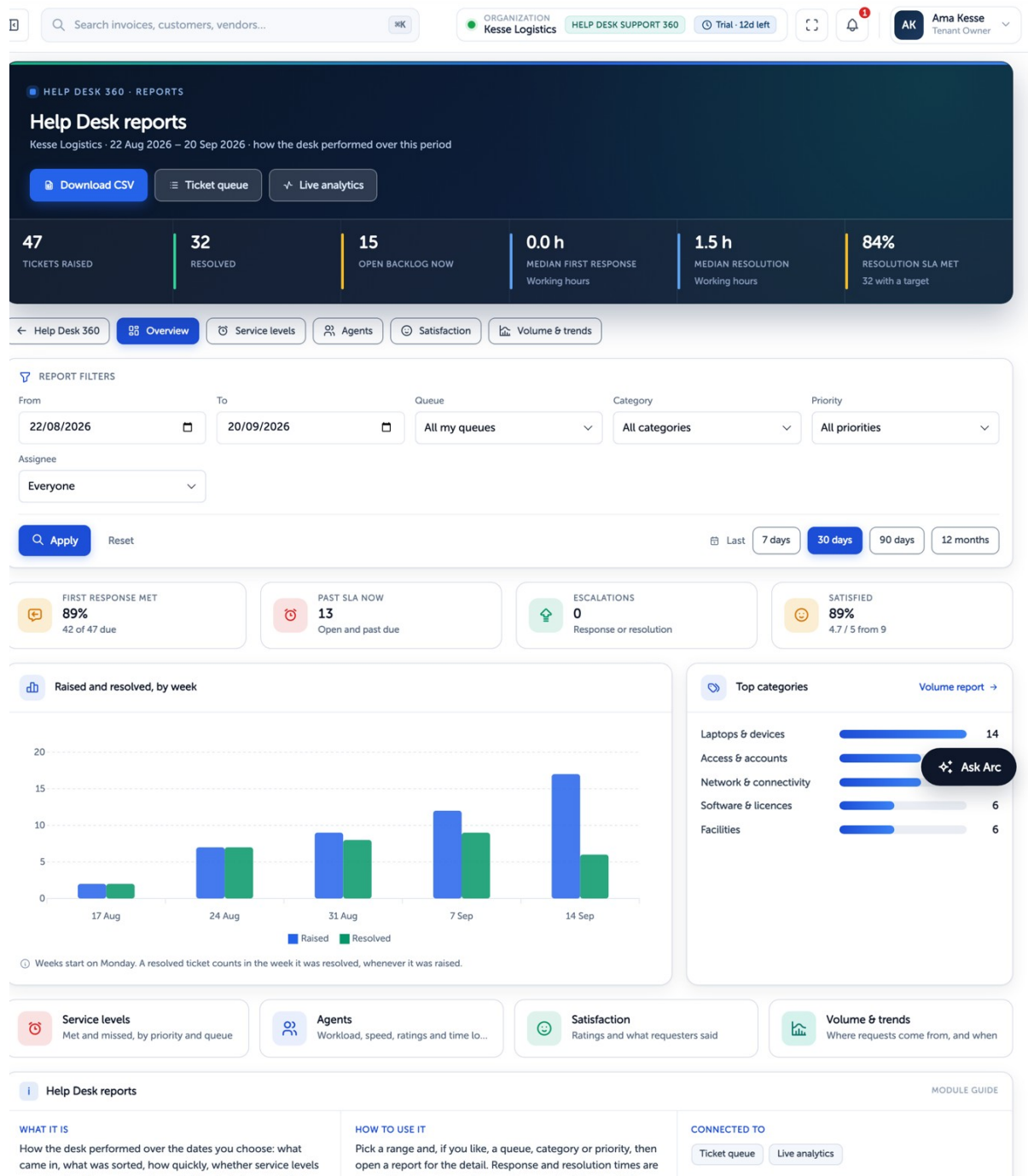


Figure 20 – The reports centre: Overview, Service levels, Agents, Satisfaction and Volume & trends, all obeying one date range.

Step 26. Volume

How much work arrived, and what it was about.

Do this now

1. Open Volume (/support-centre/reports/volume).
2. Read the split by category. Over the default 30 days this workspace raised 47 tickets, 14 of them about Laptops & devices.

3. Read the split by priority – 20 medium, 13 high, 10 low and 4 urgent over that window.
4. Widen the range if you want the lot. All 60 tickets ever raised here break down as 24 medium, 18 high, 12 low and 6 urgent.
5. Watch the trend rather than the total. A week is noise; a month is a shape.

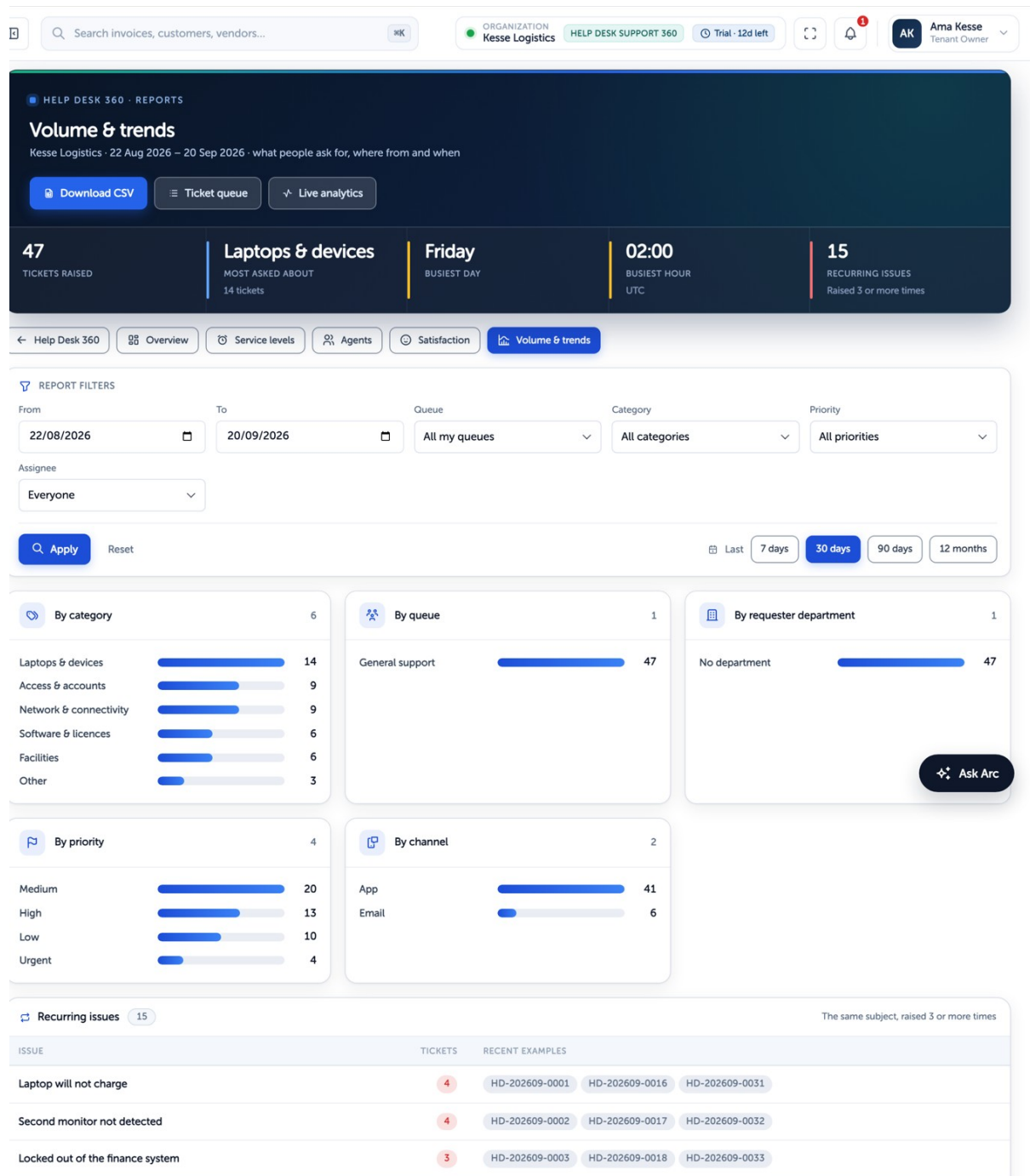


Figure 21 – Volume & trends over the last 30 days – 47 tickets raised, most about Laptops & devices (14), busiest on a Friday. By priority that is 20 medium, 13 high, 10 low and 4 urgent; by channel, 41 raised in the app against 6 by email.

▲ WATCH OUT

Check which window you are reading before you quote a figure at anybody. This report opens on the last 30 days, so its totals are smaller than the workspace's lifetime totals and both are correct – the mistake is putting one number next to the other and calling it a discrepancy.

Step 27. Agents

Who is carrying what.

Do this now

1. Open Agents (</support-centre/reports/agents>).
2. Read tickets handled and resolution times across the four agents on this desk.

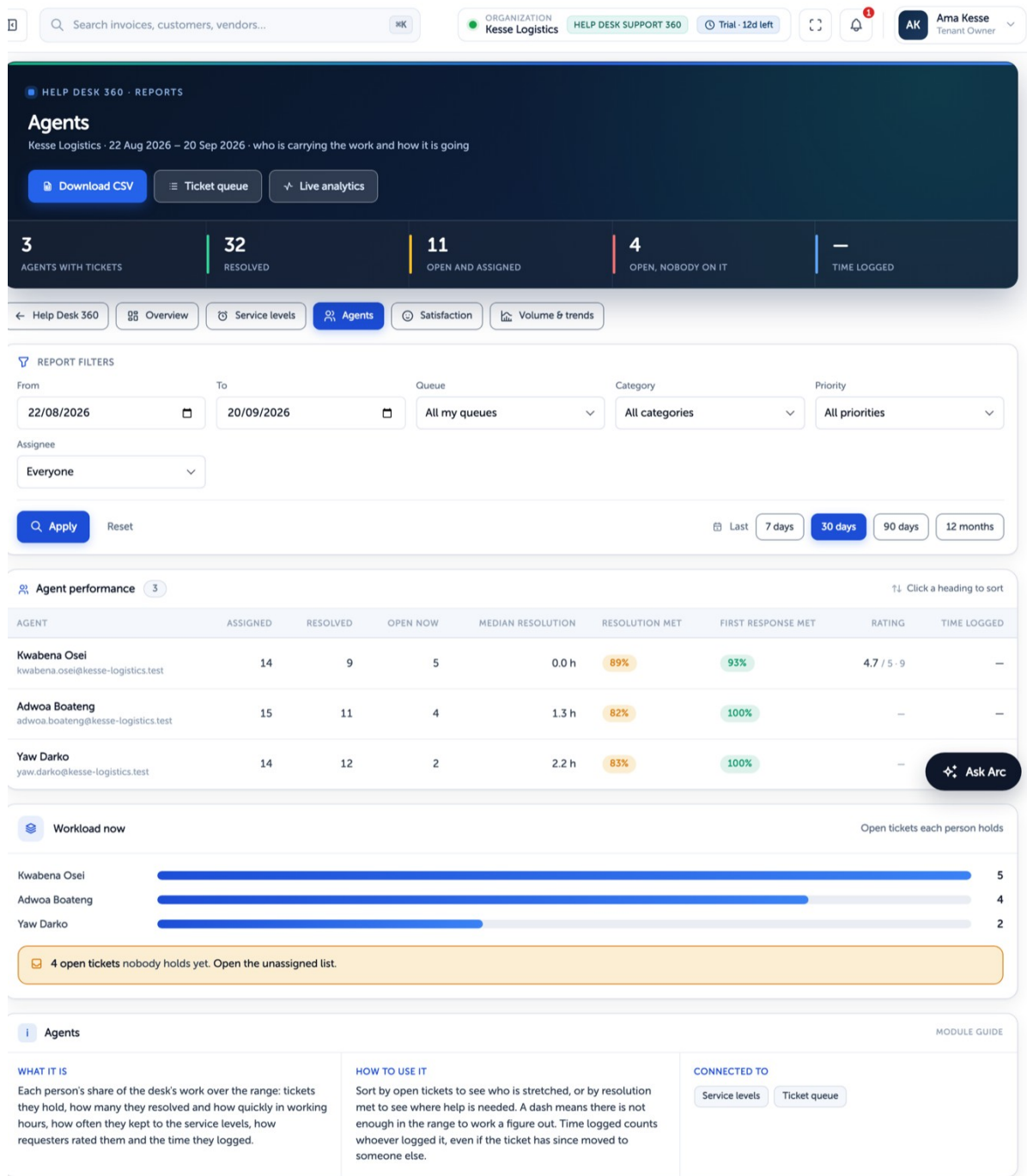


Figure 22 – The agents report. Read it as workload, not as a league table.

▲ WATCH OUT

This is a workload report, not a league table. An agent with a low count may be carrying the hard ones, and ranking people by ticket volume is how a desk learns to close things quickly rather than properly.

Step 28. SLA

Whether you kept the promises in Step 8.

Do this now

1. Open SLA (</support-centre/reports/sla>).
2. Read first-response and resolution attainment.
3. Read breaches by category. A single category breaching repeatedly is usually a staffing or a knowledge problem, not an effort problem.

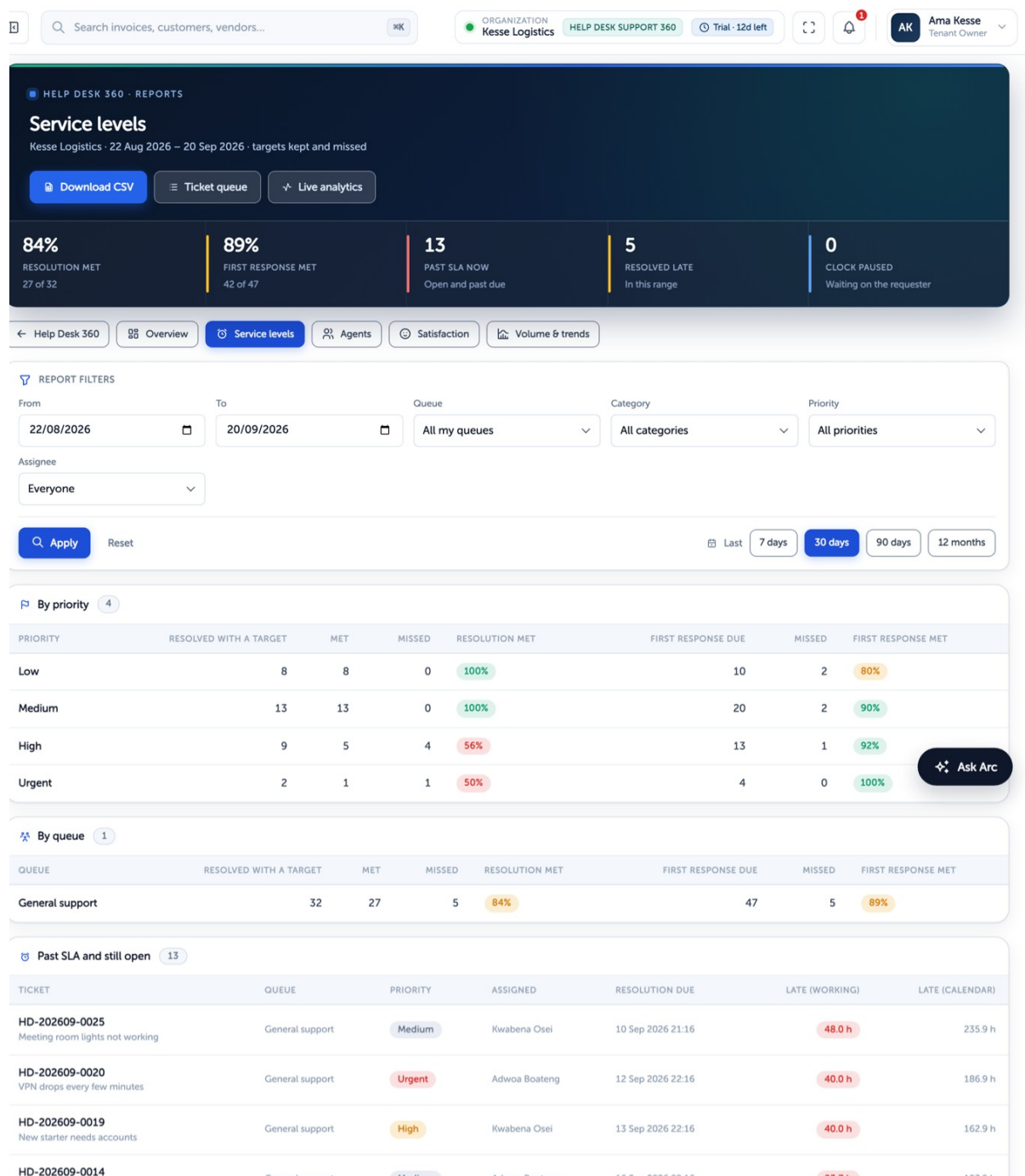


Figure 23 – Service levels – whether the promises made on the SLA screen were kept, and which categories break them.

Step 29. Satisfaction

What the people you serve actually thought.

Do this now

1. Open Satisfaction (/support-centre/reports/satisfaction).
2. Read the ratings, and read the comments underneath them.

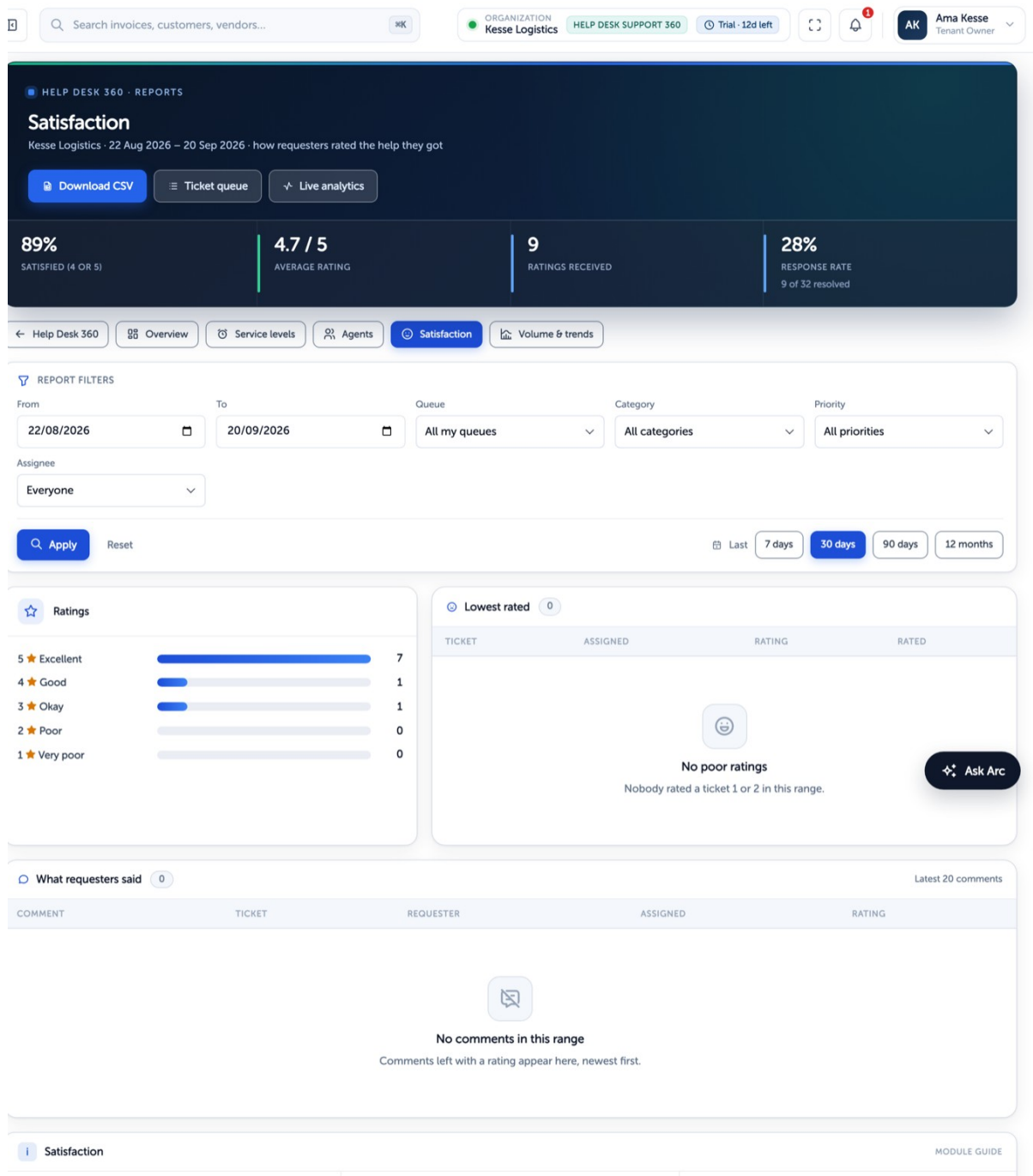


Figure 24 – Satisfaction. Read the comments underneath the scores, not just the scores.

✓ **TIP**

Read every comment, even when the score is good. The score tells you the temperature; the comment tells you why – and a five with “took three days but was worth it” is a staffing fact hiding inside a compliment.

Step 30. Analytics, and exporting

When you need the numbers somewhere else.

Do this now

1. Open Analytics (</support-centre/analytics>) for the longer view.
2. Use Export on any report to take it away as a file.

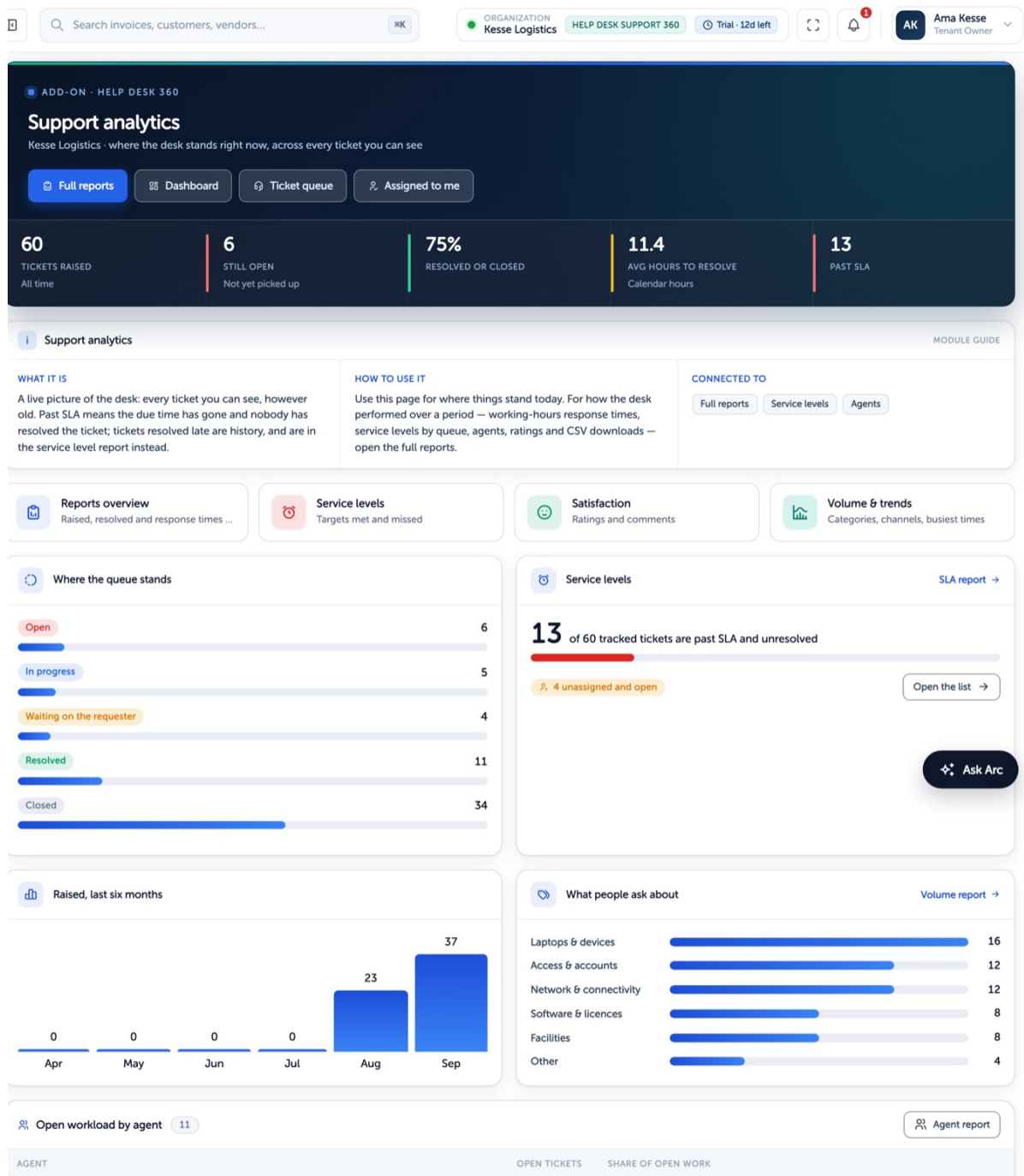


Figure 25 – Live analytics, for the longer view behind the reports.

Part 6 Arc, your assistant

Asking the desk a question in words

Step 31. What Arc can answer here

Arc comes with the app rather than as an extra. It answers from the records and reports you can already see, and it only ever sees what you can see.

Do this now

1. Press Ask Arc, bottom right of any page.
2. Try: "What data is missing from our records?"
3. Try: "How many tickets are in each category?"
4. Read the citation under the answer. It names the query or report the figure came from.

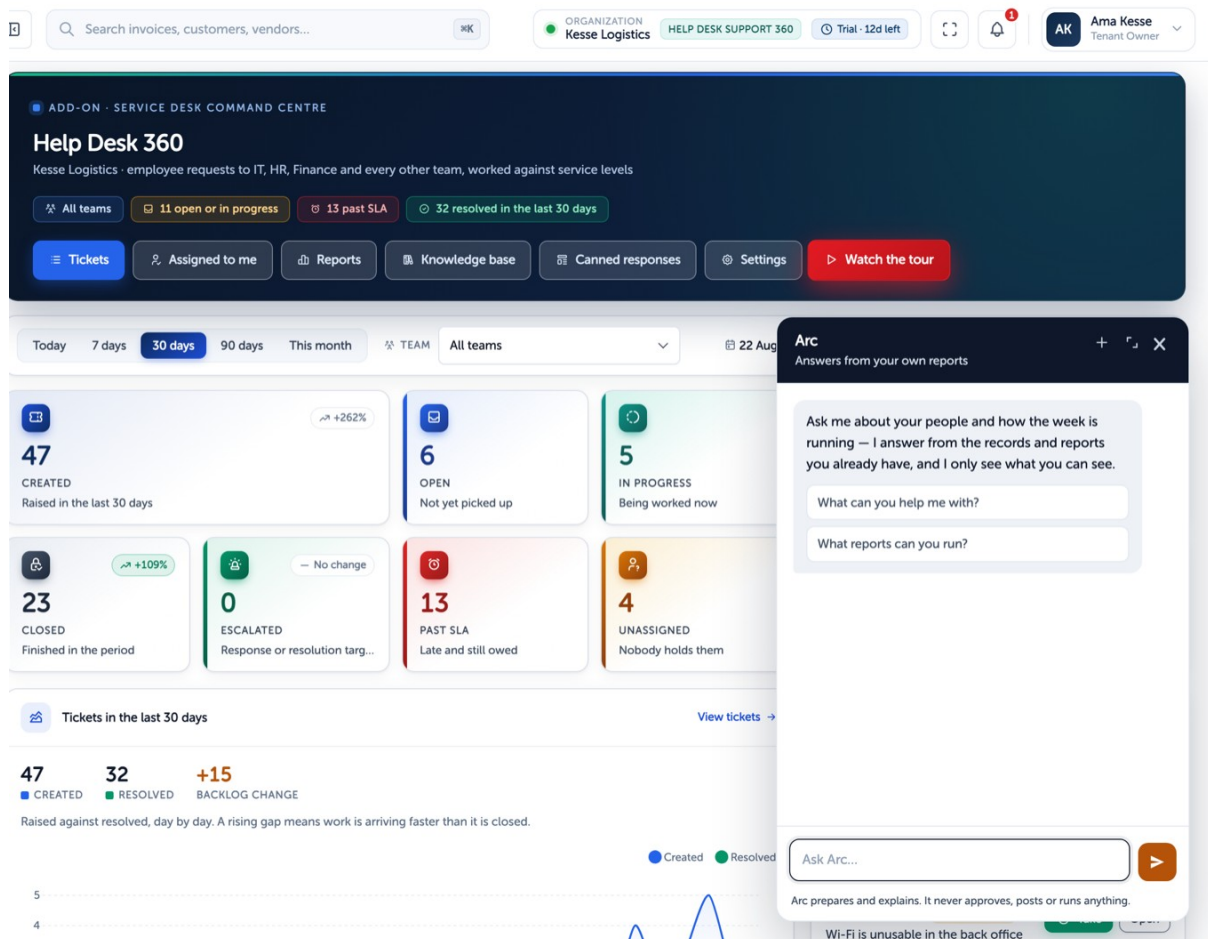


Figure 26 – Arc, opened on the desk. Every answer carries a citation naming the query or report the figure came from.

Arc never sees more than you do. Every question is answered inside your own permissions, so an agent asking about tickets gets agent answers, and a requester gets their own.

Step 32. What it will not do

Arc reads and advises. It does not close your tickets, reply to your requesters or change your settings. Where it can prepare something, it prepares a draft and a person presses Apply – the record is untouched until they do.

Part 7 What it costs

Seats, the trial, and what happens when the money stops

Step 33. Seats and the bill

You are billed for the people working the desk – the agents and administrators – and for nobody else.

Do this now

1. Open **SUBSCRIPTION** → **Billing**.
2. Read the seat count. It is the same number People & seats shows you, computed the same way.
3. Read the receipts. Every charge is here.

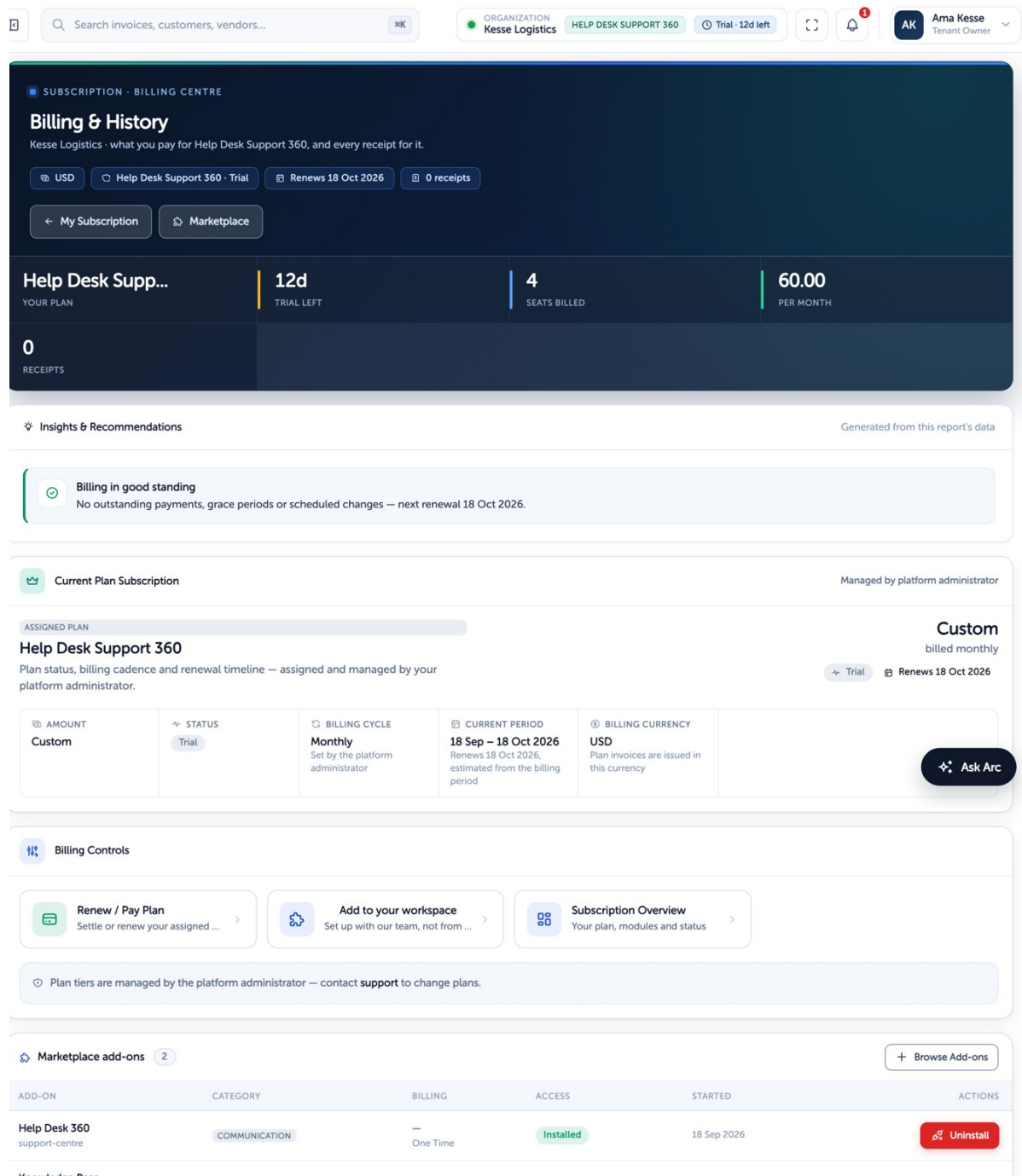


Figure 27 – Billing. The seat figure here and the one on People & seats are not two counts that agree – they are one count, asked twice.

◆ GOOD TO KNOW

The seat figure on the billing page and the one on People & seats are not two counts that happen to agree – they are one count, asked twice. That is deliberate: the most common billing complaint in any seat-priced product is two screens disagreeing about how many people there are.

Step 34. Adding seats mid-month

You hire an agent on the fifteenth. You are not charged a whole month for half of one.

Do this now

1. Seat them as usual.
2. The app works out what is owed for the rest of the period and offers it as one payment.
3. Your next invoice returns to the ordinary rate.

The screenshot shows the 'Plan Payment & Renewal' page for 'Help Desk Support 360'. The page is divided into several sections:

- Header:** Includes a search bar, organization name 'Kesse Logistics', support status 'HELP DESK SUPPORT 360', trial status 'Trial - 12d left', and user profile 'AK Ama Kesse Tenant Owner'.
- Subscription Details:** Shows 'SUBSCRIPTION · PLAN PAYMENT & RENEWAL' and 'Plan Payment & Renewal'. It includes buttons for 'Help Desk Support 360', 'On trial - ends 02 Oct 2026', 'Monthly billing', and 'Plan set by administrator'. There are also buttons for 'My Subscription' and 'Billing'.
- Plan Summary:** Displays 'Help Desk Su...' with '0 USD / MONTH' for 'SUITES + ADD-ONS' and 'PLAN RENEWS'.
- Insights & Recommendations:** A section titled 'Insights & Recommendations' with a note: 'Plan changes are managed by your platform administrator. Your plan tier was assigned when the workspace was set up. From here you can renew and switch billing cycle — to move to a different tier, contact support@oseboworkforce.com.'
- What you pay for:** A section titled 'What you pay for' showing 'USD 0.00 / monthly'. It includes a table with columns: COMPONENT, TYPE, BILLING, and RECURRING AMOUNT.
- Table:** The table lists the 'Help Desk Support 360 Plan' as the 'Core Plan' with 'Monthly' billing and a 'RECURRING AMOUNT' of 'USD 0.00 / month'. It also notes 'Plan — billed monthly in USD' with a 'RECURRING AMOUNT' of 'USD 0.00 / month'.
- Footnote:** A note states: 'One subscription, one renewal date. What it costs is agreed with our team rather than picked from a price list — renewals and the billing cycle stay yours to change here.'
- Plan Options:** Two cards are shown: 'Help Desk Support 360 — Monthly' (Current cycle) and 'Help Desk Support 360 — Annual'. The monthly card shows 'USD 60 / month' and '4 seats x USD 15.00 a month — billed on the people actually working the desk. Due today: USD 60.00 for a full month, via secure Paystack checkout.' The annual card shows 'USD 600 / year' and '4 seats x USD 150.00 a year — billed on the people actually working the desk. Due today: USD 600.00 — prorated for the remainder of your period, via secure Paystack checkout.'
- Plan Payment & Renewal:** A section titled 'Plan Payment & Renewal' with a 'MODULE GUIDE' link. It includes a 'WHAT IT IS' section explaining the page shows what you pay for 'Help Desk Support 360' on its agreed terms, and a 'HOW TO USE IT' section explaining how to renew or switch between monthly and annual billing.

Figure 28 – Changing the plan. Adding an agent mid-month is charged for the rest of the period only.

Step 35. The trial, and lapsing

The app is honest about the end of the road rather than switching off in the night.

Do this now

1. During the trial, everything works.
2. When it lapses, the desk becomes **read-only**: every screen still opens, every ticket is still readable, and nothing can be written.
3. Pay and it all comes back, exactly as it was.

★ IMPORTANT

Read-only refuses by method, not by screen. That means every way of writing is closed at once – including ones added to the product after your trial ended – rather than a list somebody has to remember to keep up to date.

Plain-language glossary

Agent – somebody who works tickets. Costs a seat.

Breach – a ticket that missed the promise made by its SLA policy.

Canned response – a saved reply, used as a starting point.

Category – what a request is about. The axis every report groups by.

Closed – finished. A reply starts a new conversation.

Consult – bringing a colleague in without handing the ticket over.

Internal note – writing on a ticket that the requester never sees.

Merge – joining a duplicate to the ticket that carries the answer. Both survive.

Pending employee – waiting on the person who asked. The SLA clock stops.

Queue – a group of agents sharing incoming work. Membership is the seat.

Requester – somebody who raises tickets and follows their own. Free, for ever.

Resolved – the agent believes it is done, and the requester may disagree.

Seat – one person working the desk, and the unit you are billed in.

SLA policy – the promise about response and resolution time, by priority.

Setting up the desk – the ten-point checklist

Work down this list once. Everything above it is explanation.

- 1.** Name the workspace (Step 2).
- 2.** Decide your categories – few and broad (Step 3).
- 3.** Add custom fields only where an agent always asks anyway (Step 4).
- 4.** Set approvals on the categories that spend money or grant access (Step 5).
- 5.** Create one queue (Step 6).
- 6.** Set business hours before any SLA (Step 7).
- 7.** Write SLA policies you can keep (Step 8).
- 8.** Verify your email domain before telling anybody the address (Step 9).
- 9.** Write your first five canned responses (Step 10).
- 10.** Invite your agents, then everybody else as requesters (Step 12).

The routine

Every morning

- Unassigned first. Then breached. Then your own.
- Anything in Pending employee for more than two days – chase it or close it.

Every week

- Read Volume and look at “Other”. If it is growing, your categories are wrong.
- Read SLA breaches by category.
- Write one knowledge article from the best answer anybody gave.

Every month

- Read Satisfaction, including every comment.
- Read People & seats. Anybody suspended who has actually left should be removed.
- Check the seat count against the bill.

Where to go next

If your company later needs payroll, leave, attendance or accounting, the same login grows into the full Osebo platform and your desk comes with it – the tickets, the categories, the history and the knowledge base stay exactly where they are. Nothing in this book has to be unlearned.

And if what you actually need next is to know who was at work, that is a different 360 app with its own book: The Osebo Time & Attendance 360 Book.