Customer Webinar
Dec 6th, 2022
12pm EDT

“CrushBank Best Practices”

Agenda

- Welcome
  - Brian Mullaney, CRO
- Recently added features
  - Ben Subercaseaux, Snr Product Mgr.
- CrushBank best practices
  - David Tan, CTO
- Featured customer
  - Nicholas Auxier
  - Director – Command Center
  - Visual Edge IT
- New features coming
  - Ben Subercaseaux, Snr Product Mgr.
- Q&A

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Recently Added Features

- Search and Data Capture
  - Secret Server
  - Liongard integration
  - Outlook Plug-in
- Data Quality
  - No Good Data
  - Solved My Issue
- Workflow
  - ConnectWise Auto Budget
  - ConnectWise Auto Type/Sub-type/Item

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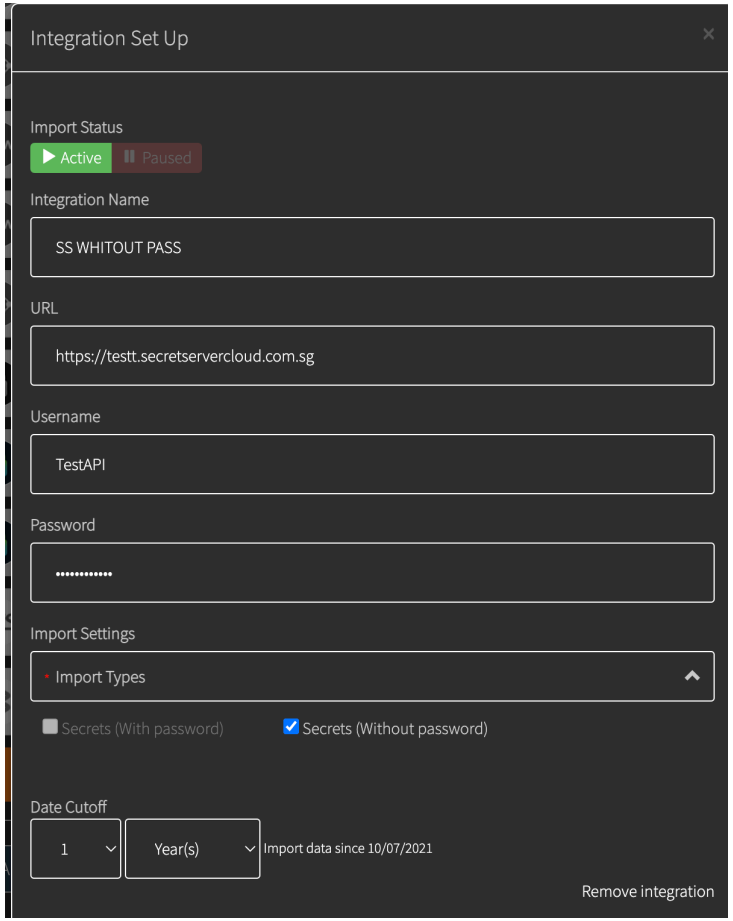
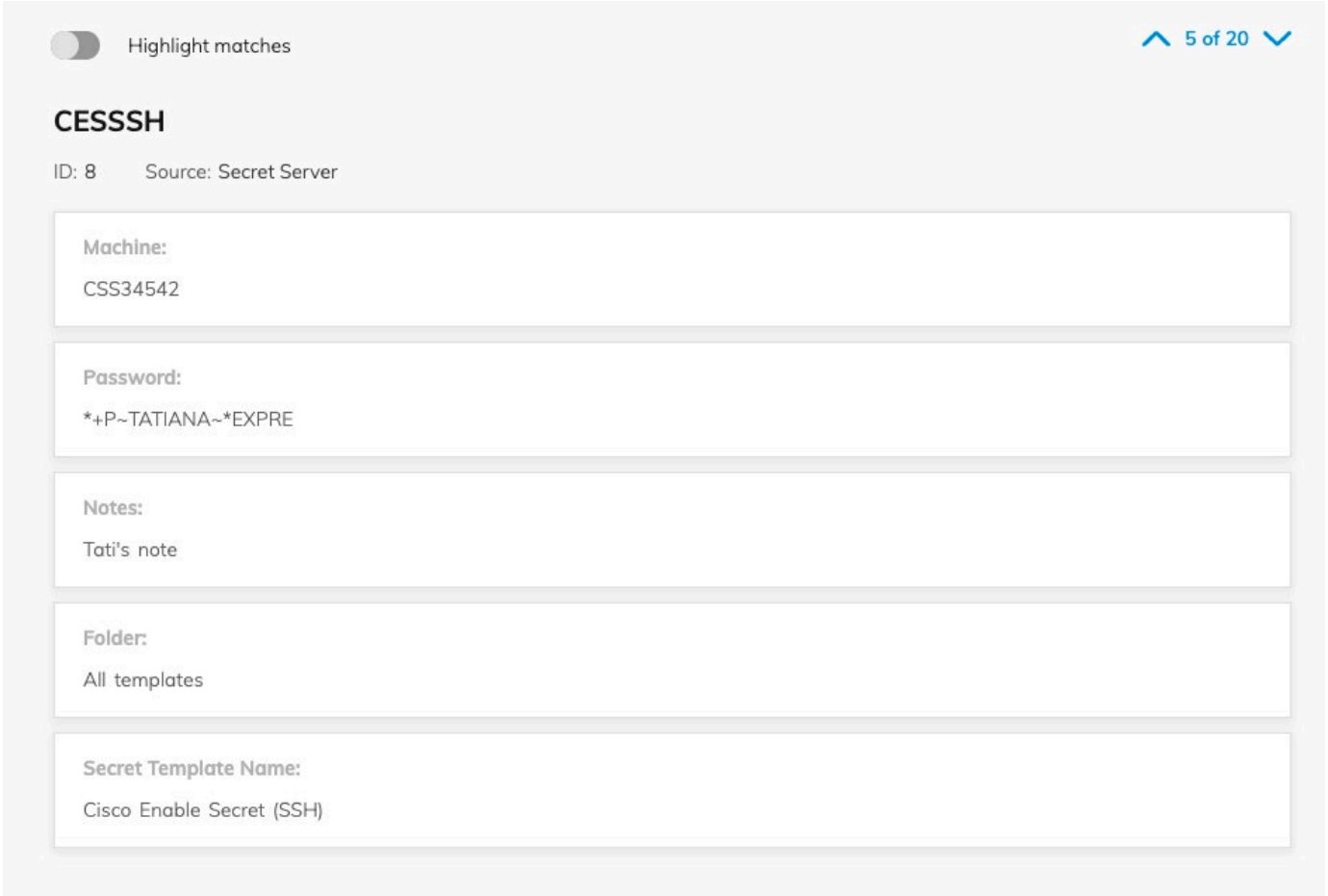
Features

Secret Server





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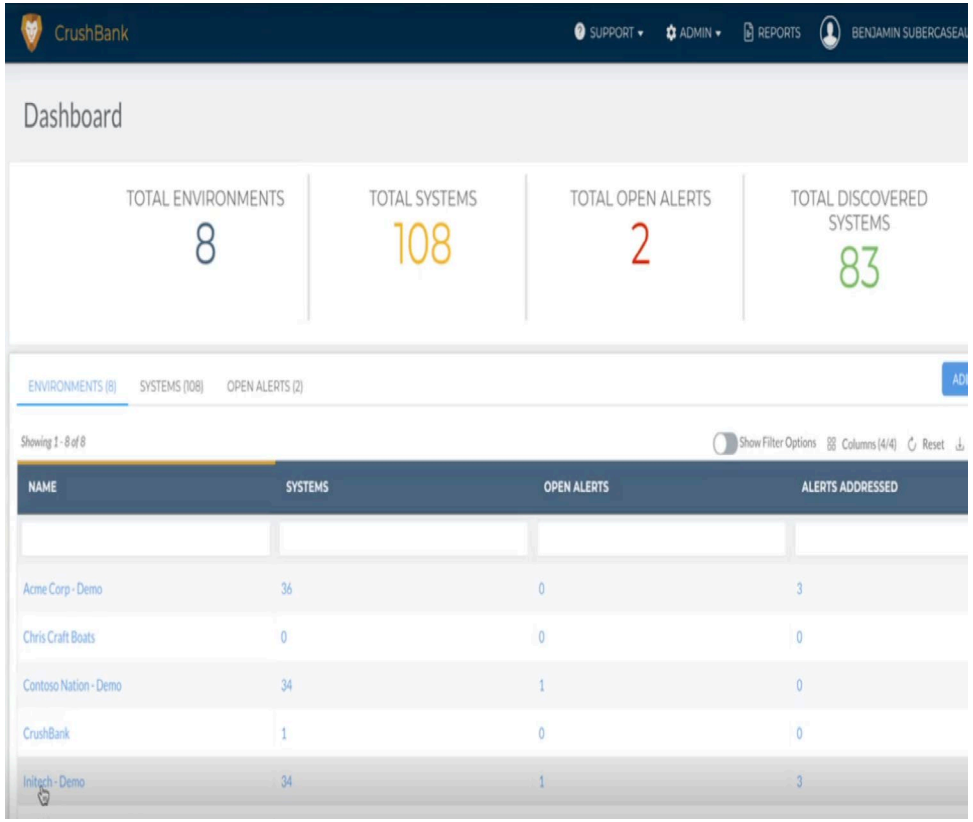
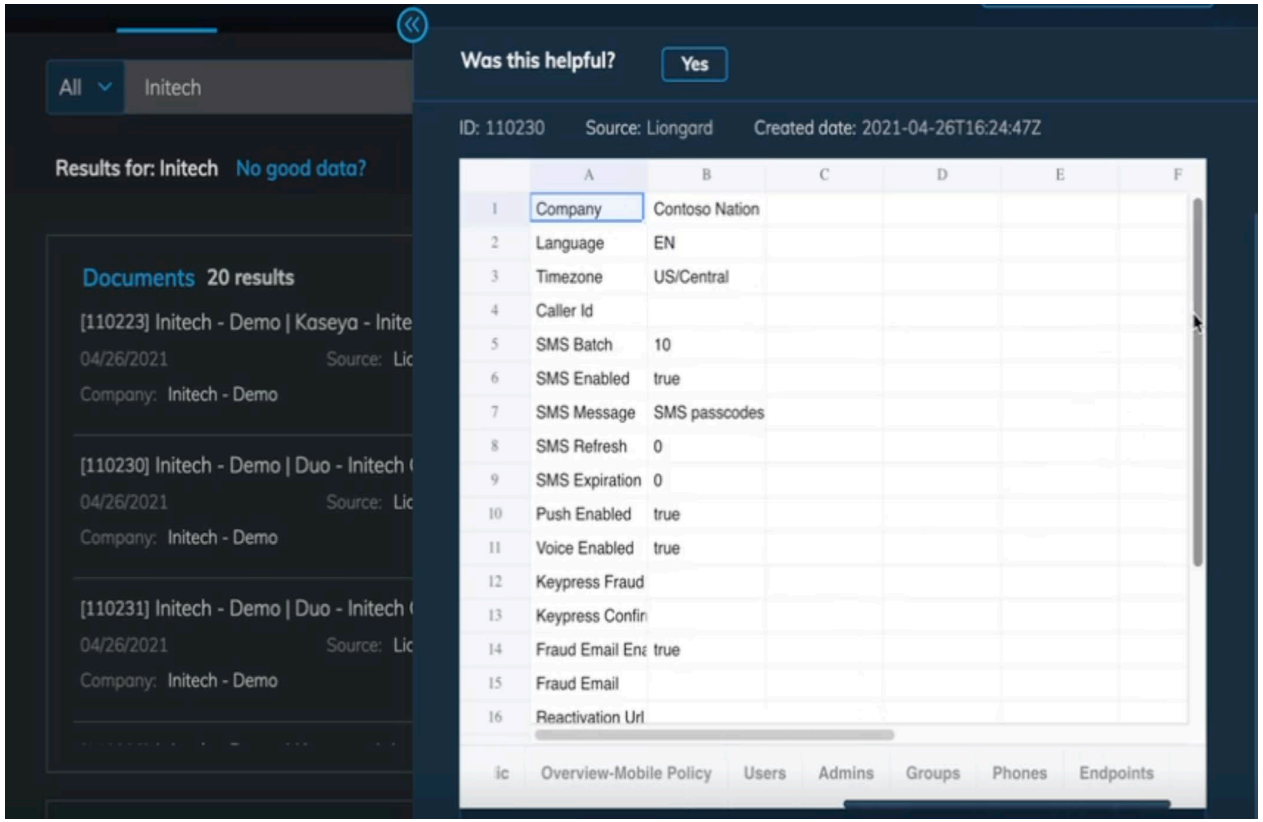
Features

Liongard Integration





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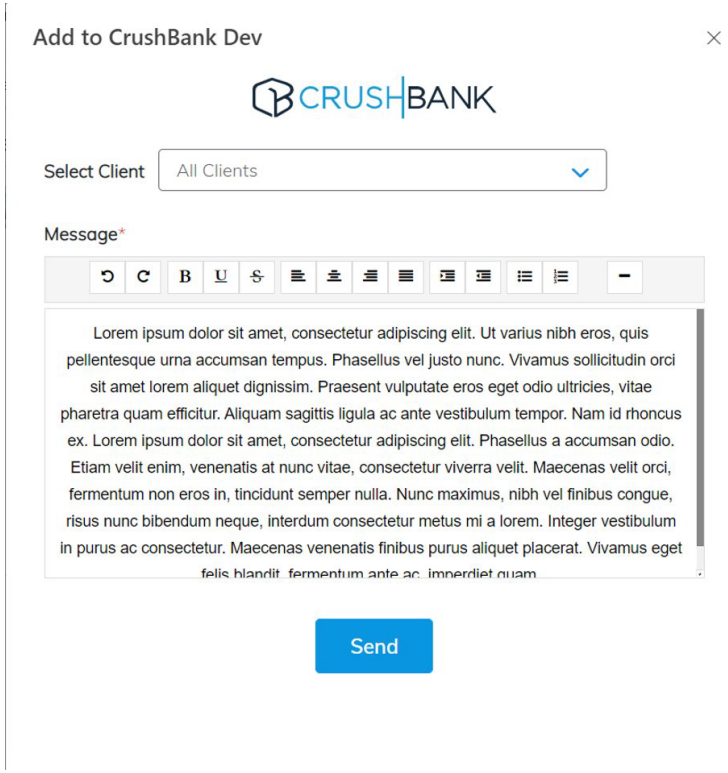
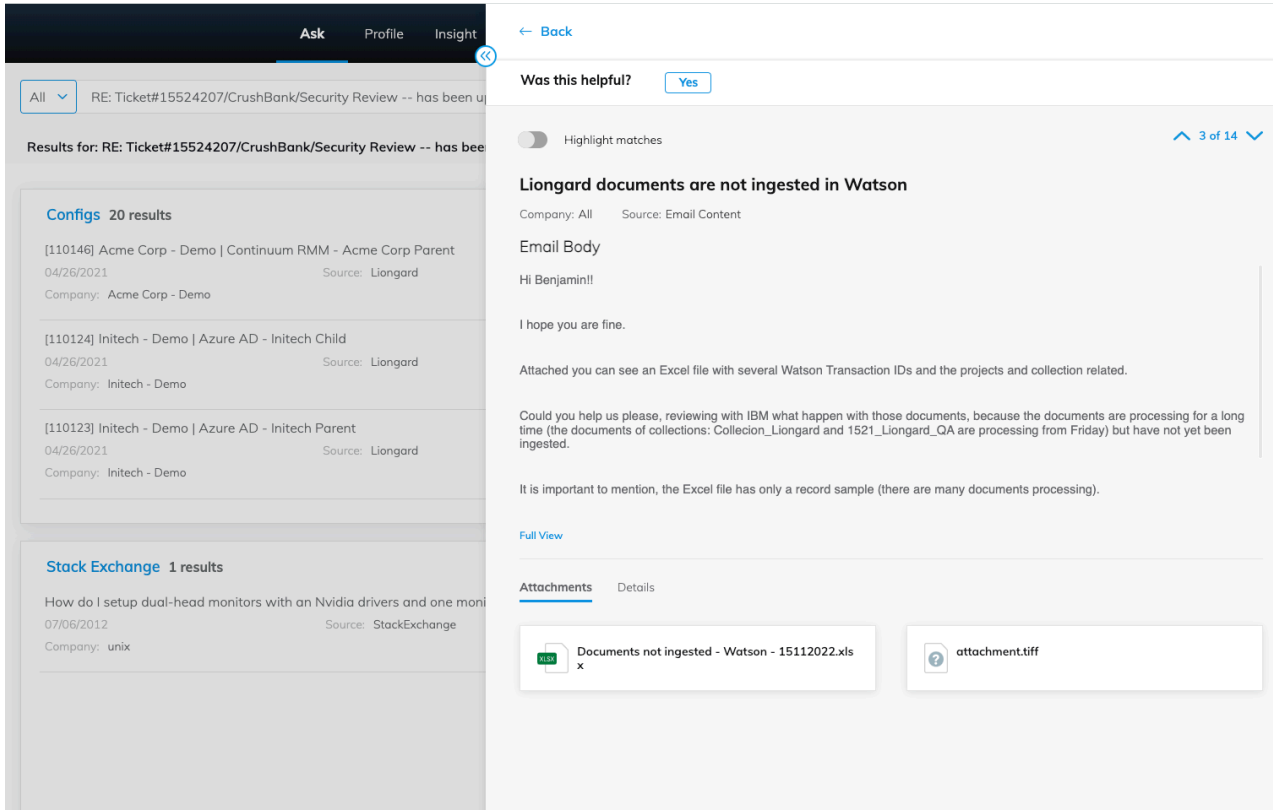
Features

Outlook Plug-in





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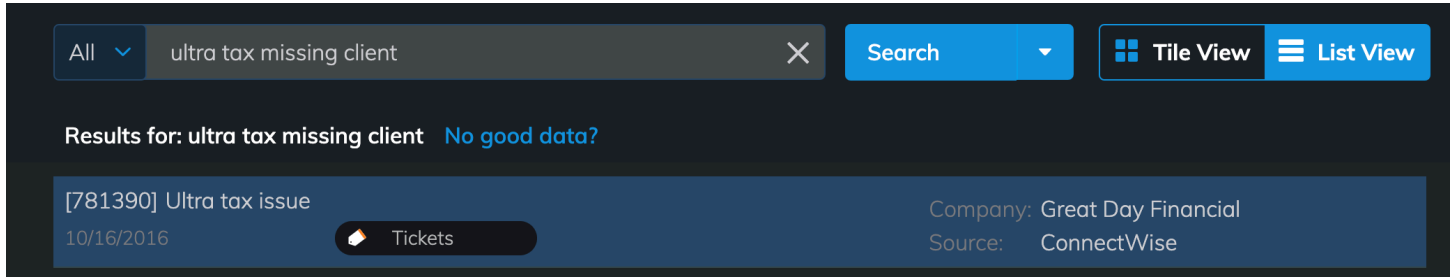
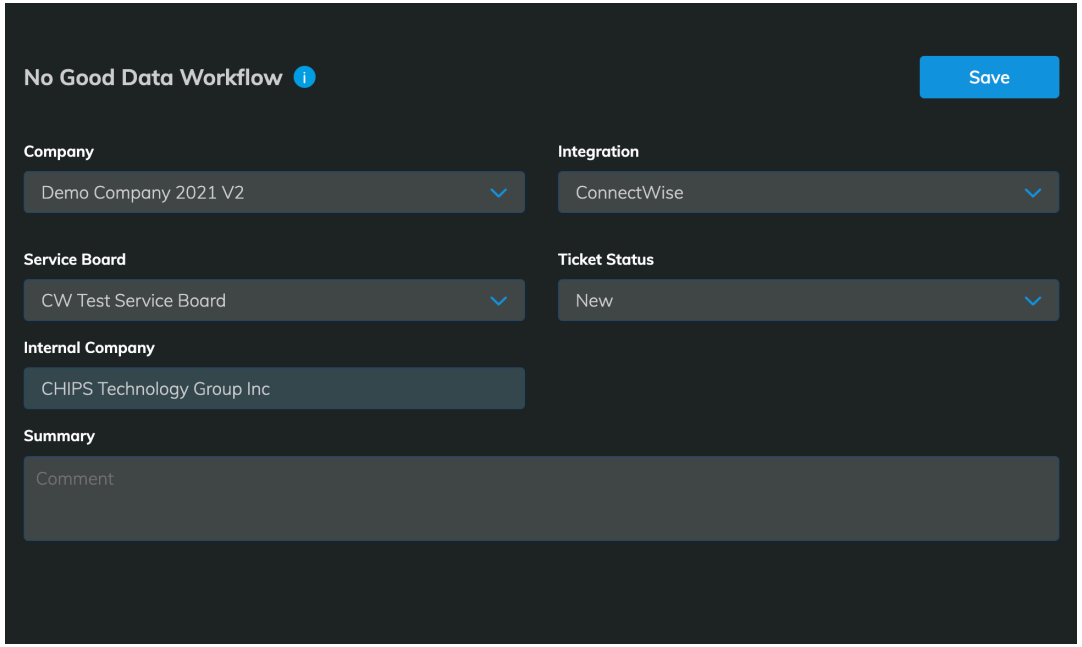
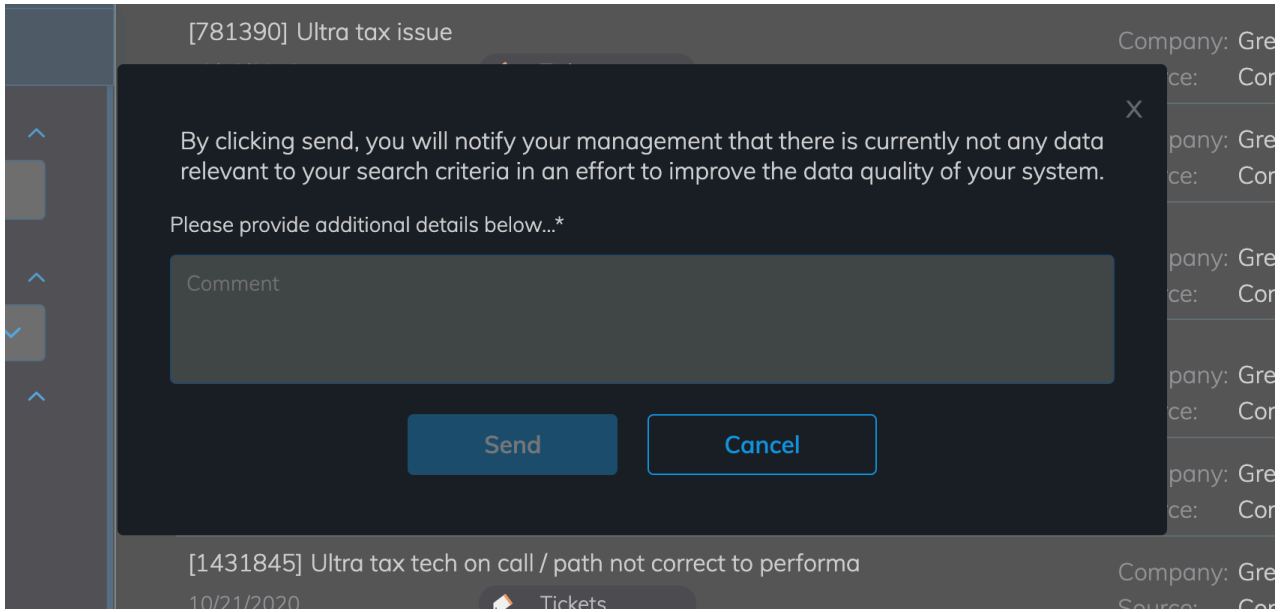
Features

No Good Data Workflow







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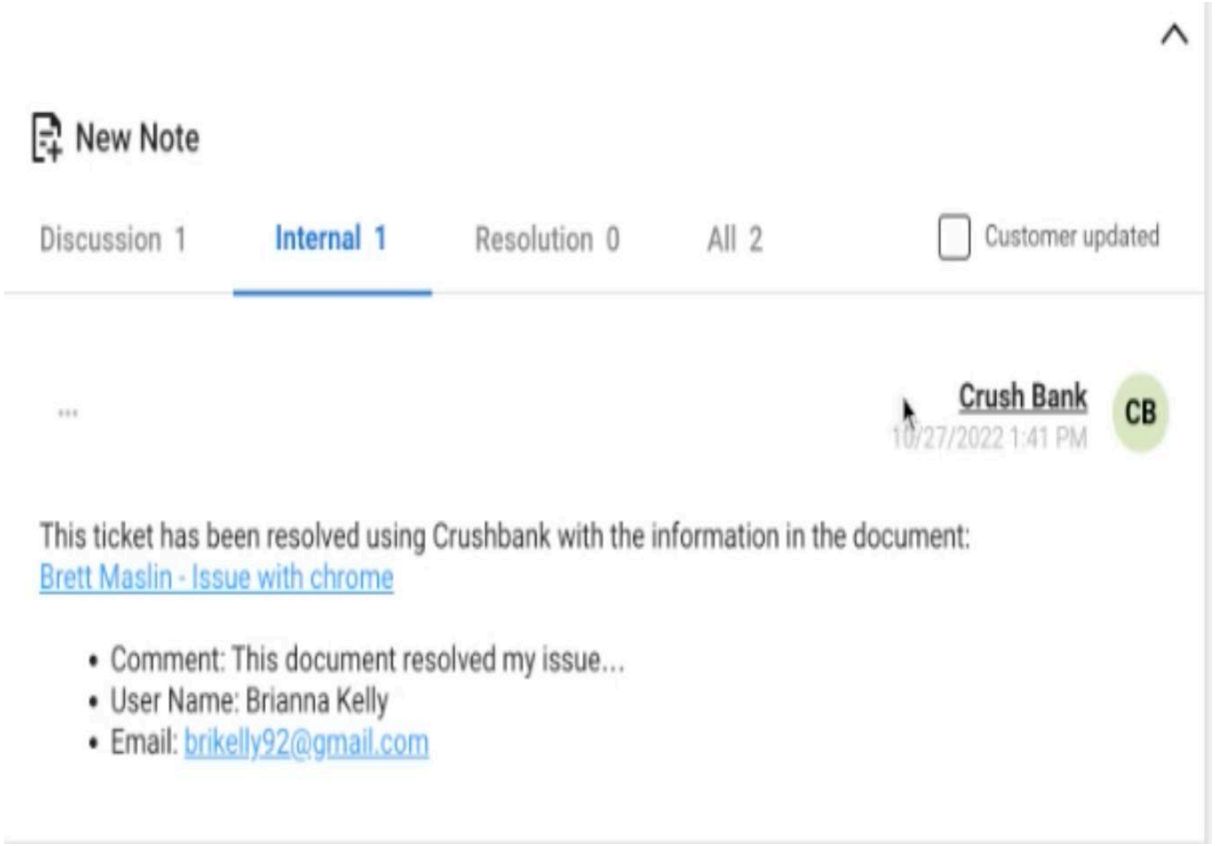
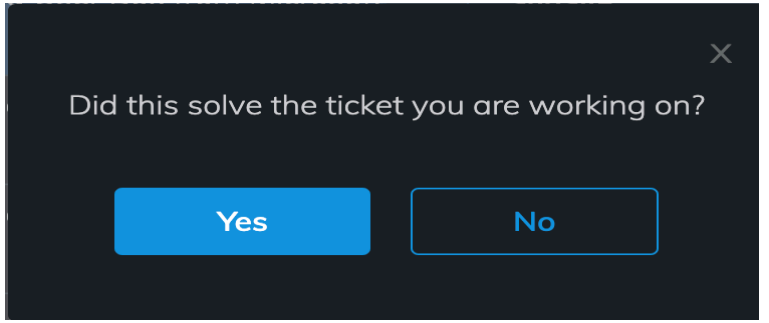
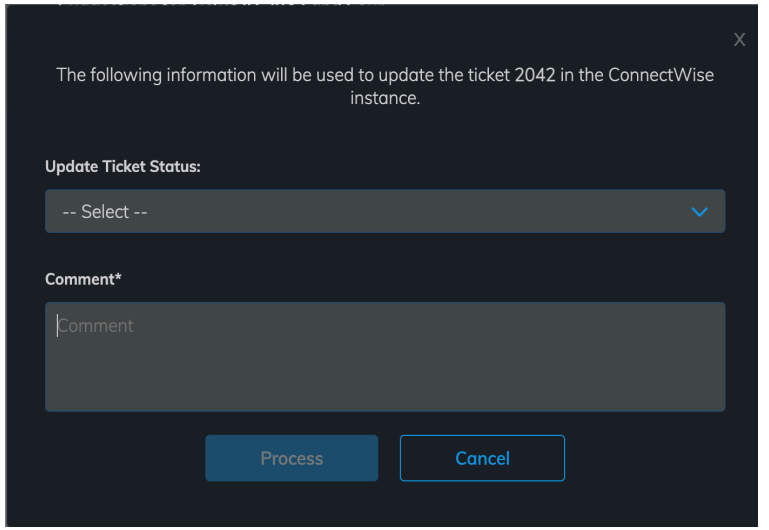
Features

Solved My Issue







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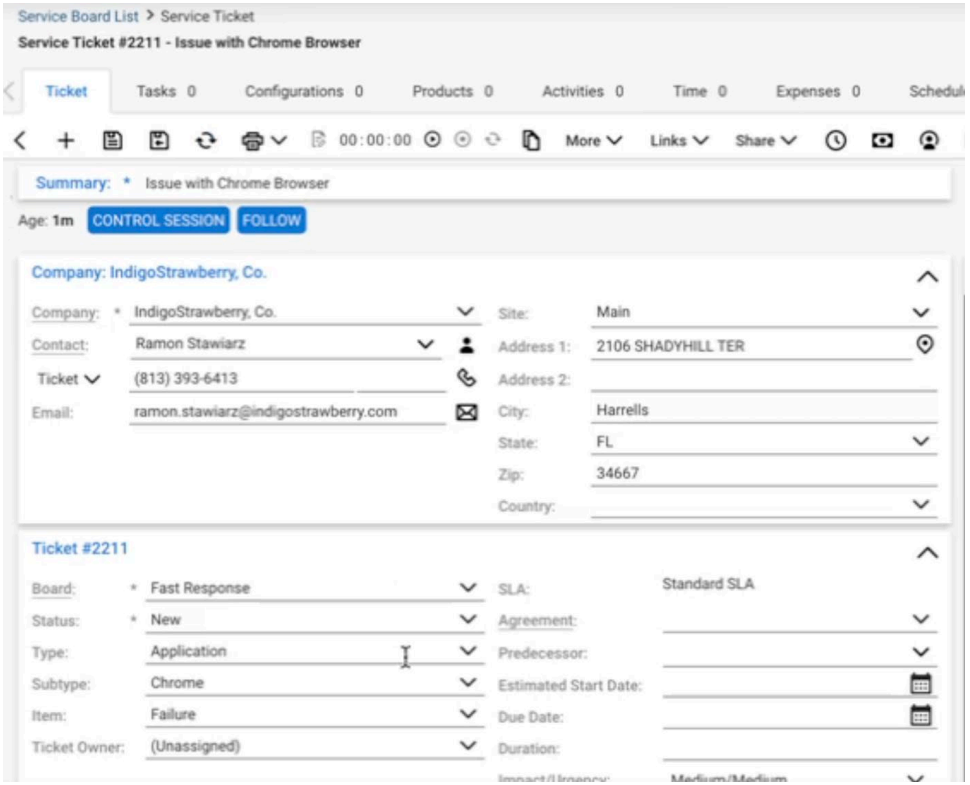
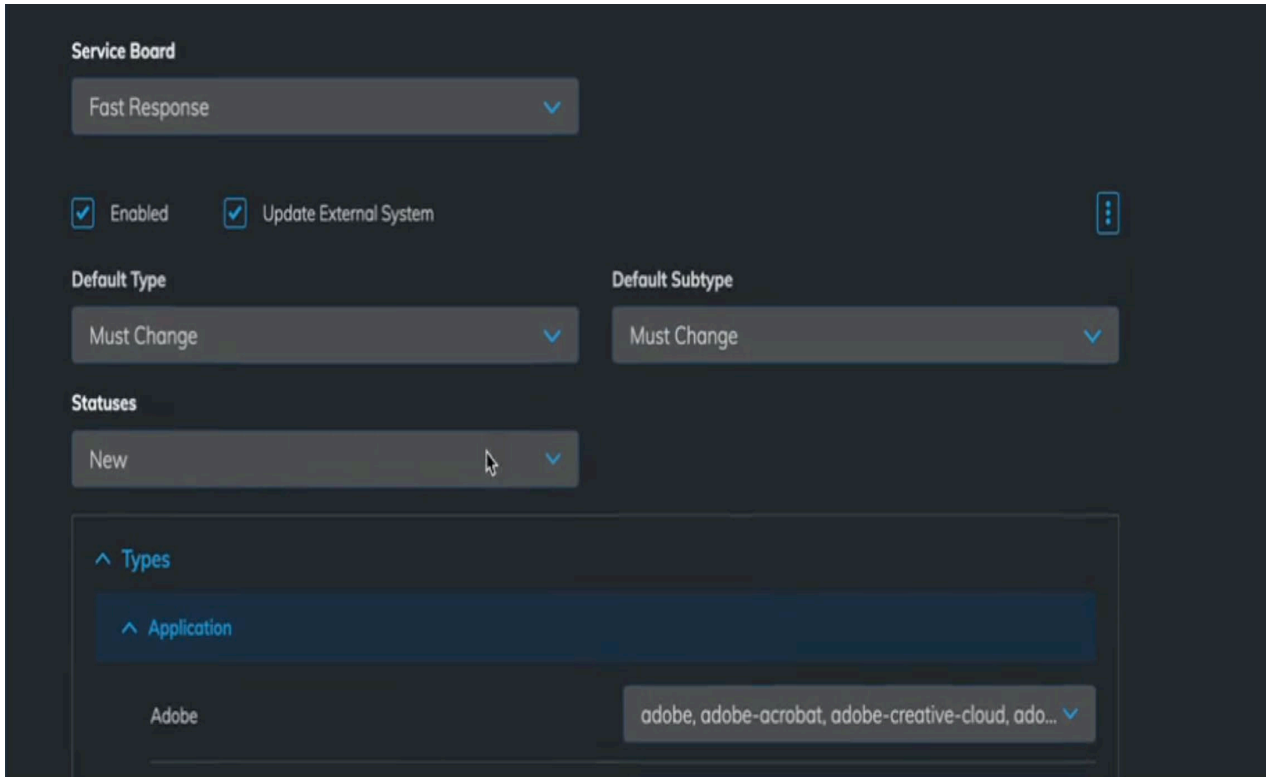
Features

Ticket Classifier





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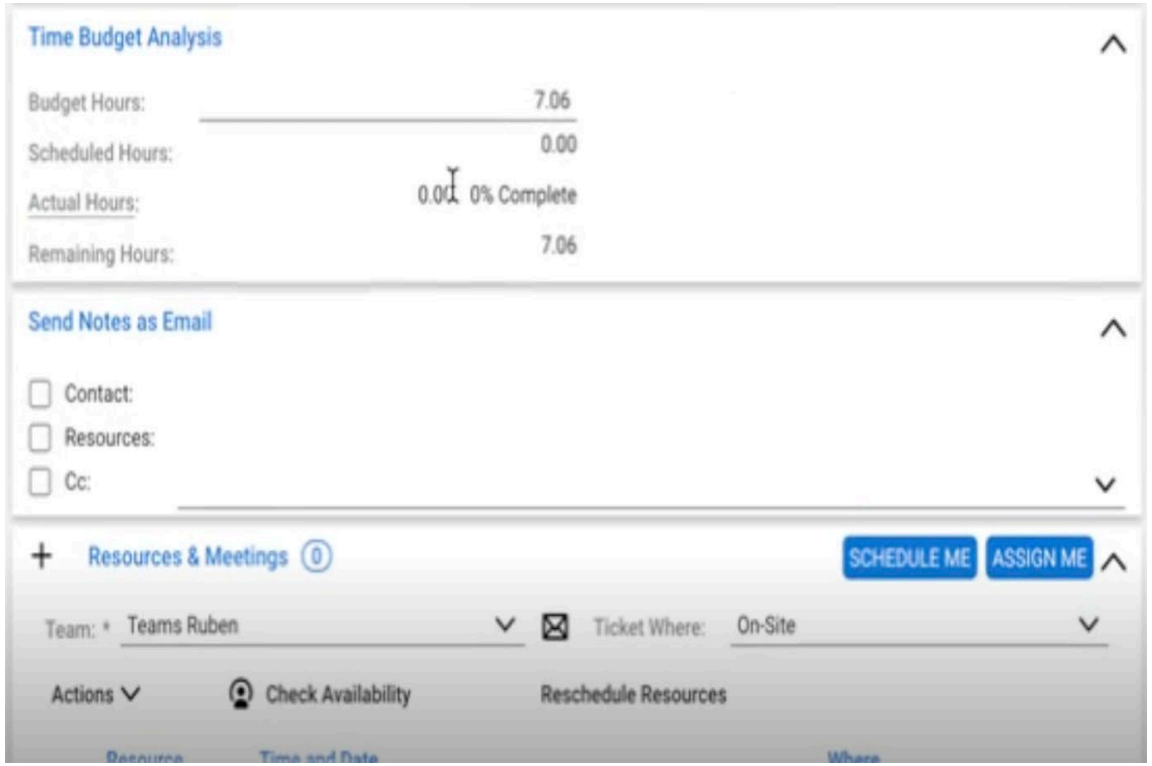
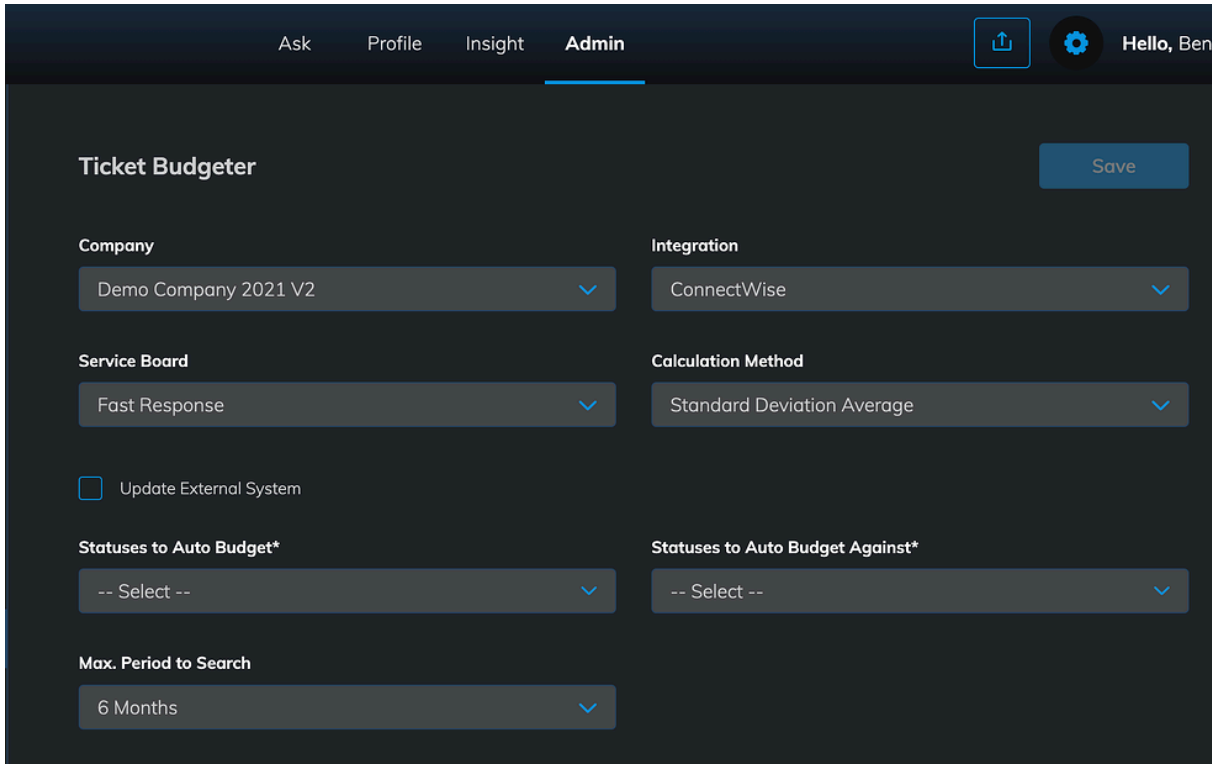
Features

Ticket Budgeter





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Best Practices

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Best Practices

- Admin/Manager
  - No escalation without using CrushBank
  - Analysis of 20 tickets over 60 minutes
  - Use of synonyms
  - Reverse lookup – type in an IP address, phone number or license key
  - Ask how many Google searches people do
    - Use the custom upload feature when useful results are found
  - Encourage use of:
    - “No good data” button
    - Adding notes to how this helped you when solving a ticket
    - Use the “Was this helpful” button
- Technician
  - If no results, switch to Company All
  - Use tile view
  - In Resolve, ask a further question
  - Keyword search – include double quotes around combinations of words

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Featured Customer

Nicholas Auxier

Director - Command Center

Visual Edge IT

Pendleton, IN

VISUAL EDGE IT™

SECURE TECHNOLOGY SOLUTIONS

Visual Edge IT, Inc. (VEIT) specializes in managed IT services and security, cloud computing, and print/copy solutions for businesses across the U.S. including remote office locations. They offer a full line of office technology and services including 24/7 remote monitoring and administration of networks, service desk, and data backup and restore to improve business processes across a variety of industries.

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Coming Soon

- CrushBank Answer
- oData Feed (Open Data Protocol)

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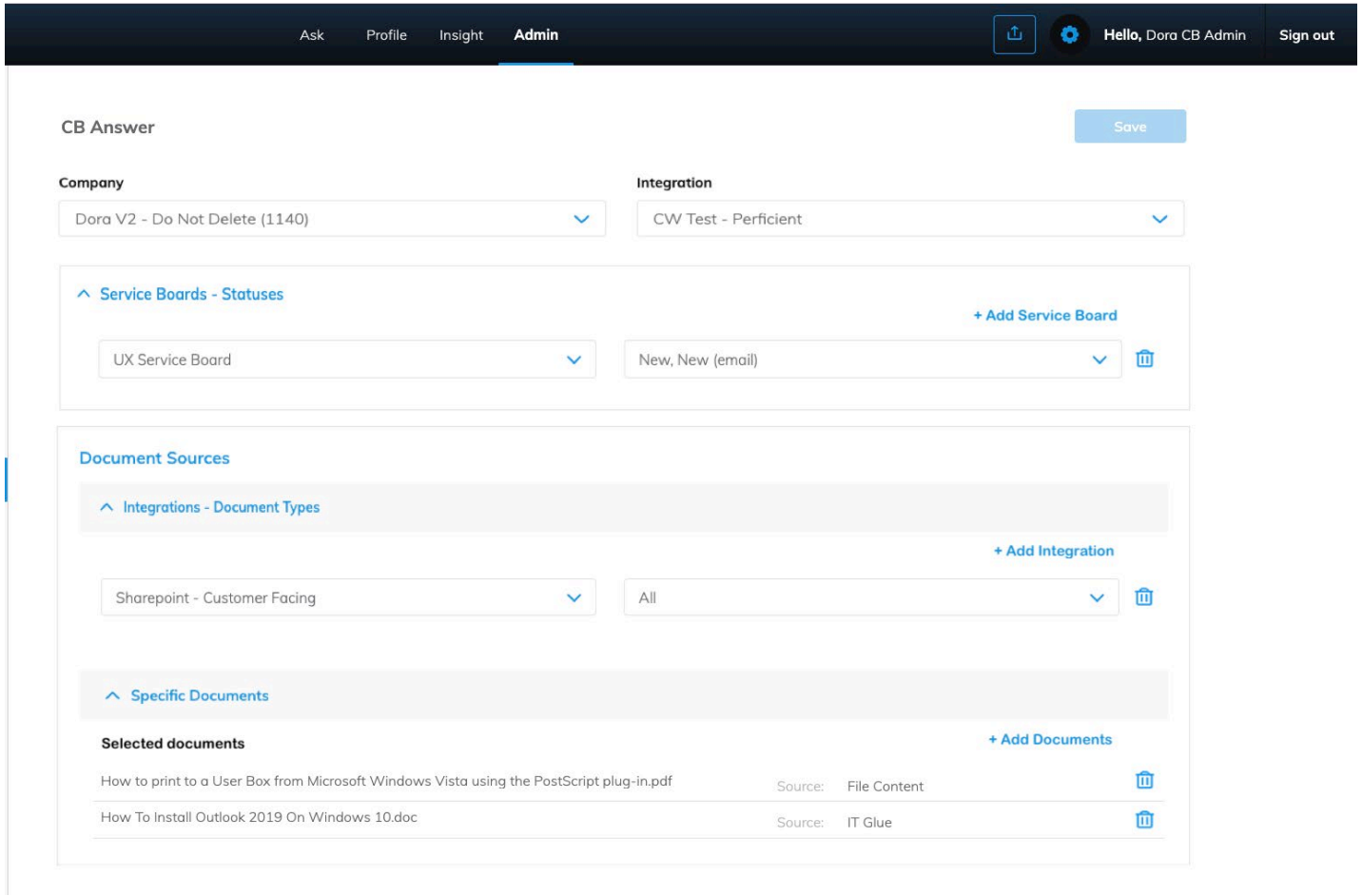
Coming Soon

CrushBank Answer



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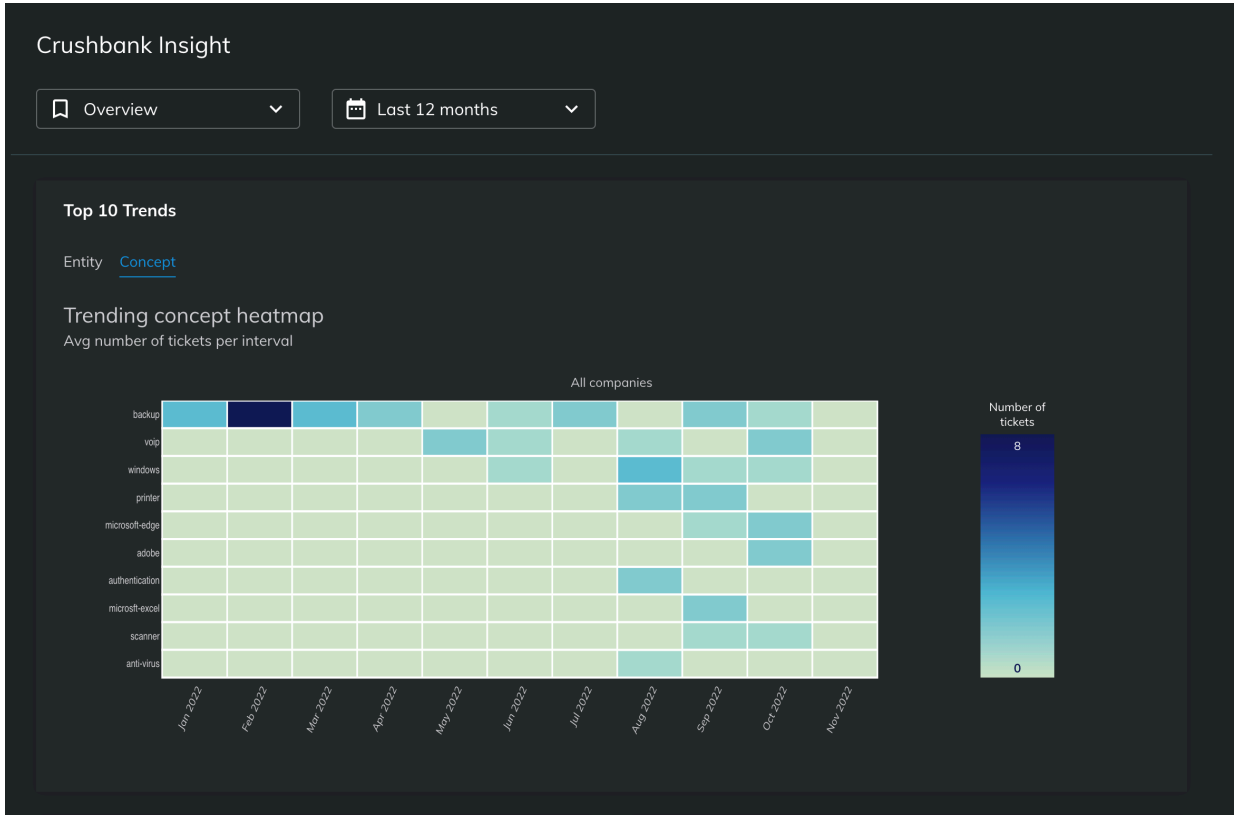
Coming Soon

oData Feed



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Q&A

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