



**Customer Webinar**

**Dec 6<sup>th</sup>, 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



**CRUSHBANK**  
**CUSTOMER WEBINAR**

When: 12PM EDT, Tuesday, Dec 6th | Platform: Zoom

SPEAKERS

 <b>Brian Mullaney</b> Chief Revenue Officer	 <b>David Tan</b> Chief Technical Officer	 <b>Ben Subercaseaux</b> Senior Product Manager
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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





## Secret Server

Integration Set Up

Import Status  
▶ Active ⏸ Paused

Integration Name  
SS WHITOUT PASS

URL  
https://testt.secretservercloud.com.sg

Username  
TestAPI

Password  
\*\*\*\*\*

Import Settings  
Import Types  
 Secrets (With password)  Secrets (Without password)

Date Cutoff  
1 Year(s) Import data since 10/07/2021

Remove integration

Highlight matches 5 of 20

### CESSSH

ID: 8 Source: Secret Server

**Machine:**  
CSS34542

**Password:**  
\*+P~TATIANA~\*EXPRE

**Notes:**  
Tati's note

**Folder:**  
All templates

**Secret Template Name:**  
Cisco Enable Secret (SSH)



# Features

## Liongard Integration

**CrushBank** | SUPPORT | ADMIN | REPORTS | BENJAMIN SUBERCAEA

### Dashboard

TOTAL ENVIRONMENTS: 8 | TOTAL SYSTEMS: 108 | TOTAL OPEN ALERTS: 2 | TOTAL DISCOVERED SYSTEMS: 83

ENVIRONMENTS (8) | SYSTEMS (108) | OPEN ALERTS (2)

Showing 1 - 8 of 8 | Show Filter Options | Columns (4/4) | Reset

NAME	SYSTEMS	OPEN ALERTS	ALERTS ADDRESSED
Acme Corp - Demo	36	0	3
Chris Craft Boats	0	0	0
Contoso Nation - Demo	34	1	0
CrushBank	1	0	0
Initech - Demo	34	1	3

All | Initech

Results for: Initech No good data?

**Documents 20 results**

- [110223] Initech - Demo | Kaseya - Initech  
04/26/2021 Source: Lic  
Company: Initech - Demo
- [110230] Initech - Demo | Duo - Initech  
04/26/2021 Source: Lic  
Company: Initech - Demo
- [110231] Initech - Demo | Duo - Initech  
04/26/2021 Source: Lic  
Company: Initech - Demo

Was this helpful?

ID: 110230 Source: Liongard Created date: 2021-04-26T16:24:47Z


	A	B	C	D	E	F
1	Company	Contoso Nation				
2	Language	EN				
3	Timezone	US/Central				
4	Caller Id					
5	SMS Batch	10				
6	SMS Enabled	true				
7	SMS Message	SMS passcodes				
8	SMS Refresh	0				
9	SMS Expiration	0				
10	Push Enabled	true				
11	Voice Enabled	true				
12	Keypress Fraud					
13	Keypress Confir					
14	Fraud Email Ena	true				
15	Fraud Email					
16	Reactivation Url					

ic Overview-Mobile Policy Users Admins Groups Phones Endpoints



## Outlook Plug-in

### Add to CrushBank Dev



Select Client

Message\*

**C** **B** U *I* **S** [List Icons]

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Ut varius nibh eros, quis pellentesque urna accumsan tempus. Phasellus vel justo nunc. Vivamus sollicitudin orci sit amet lorem aliquet dignissim. Praesent vulputate eros eget odio ultricies, vitae pharetra quam efficitur. Aliquam sagittis ligula ac ante vestibulum tempor. Nam id rhoncus ex. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus a accumsan odio. Etiam velit enim, venenatis at nunc vitae, consectetur viverra velit. Maecenas velit orci, fermentum non eros in, tincidunt semper nulla. Nunc maximus, nibh vel finibus congue, risus nunc bibendum neque, interdum consectetur metus mi a lorem. Integer vestibulum in purus ac consectetur. Maecenas venenatis finibus purus aliquet placerat. Vivamus eget felis blandit fermentum ante ac imperdiet quam.

**Send**

Ask Profile Insight

← Back

Was this helpful?

Highlight matches 3 of 14

### Liongard documents are not ingested in Watson

Company: All Source: Email Content

Email Body

Hi Benjamin!

I hope you are fine.

Attached you can see an Excel file with several Watson Transaction IDs and the projects and collection related.

Could you help us please, reviewing with IBM what happen with those documents, because the documents are processing for a long time (the documents of collections: Collecion\_Liongard and 1521\_Liongard\_QA are processing from Friday) but have not yet been ingested.

It is important to mention, the Excel file has only a record sample (there are many documents processing).

Full View

Attachments Details

Documents not ingested - Watson - 15112022.xls

attachment.tiff



# Features

## No Good Data Workflow

All ▼ ultra tax missing client ✕ Search ▼ Tile View List View

Results for: ultra tax missing client [No good data?](#)

[781390] Ultra tax issue 10/16/2016 Tickets Company: Great Day Financial Source: ConnectWise

**No Good Data Workflow** i Save

**Company**  
Demo Company 2021 V2 ▼

**Integration**  
ConnectWise ▼

**Service Board**  
CW Test Service Board ▼

**Ticket Status**  
New ▼

**Internal Company**  
CHIPS Technology Group Inc

**Summary**  
Comment

[781390] Ultra tax issue Company: Gre

By clicking send, you will notify your management that there is currently not any data relevant to your search criteria in an effort to improve the data quality of your system.

Please provide additional details below...\*

Comment

Send Cancel

[1431845] Ultra tax tech on call / path not correct to performa Company: Gre  
10/21/2020 Tickets Source: Co



## Solved My Issue

New Note

Discussion 1   **Internal 1**   Resolution 0   All 2    Customer updated

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...

**Crush Bank**   
 10/27/2022 1:41 PM

This ticket has been resolved using Crushbank with the information in the document:  
[Brett Maslin - Issue with chrome](#)

- Comment: This document resolved my issue...
- User Name: Brianna Kelly
- Email: [brikelly92@gmail.com](mailto:brikelly92@gmail.com)

Did this solve the ticket you are working on?

The following information will be used to update the ticket 2042 in the ConnectWise instance.

Update Ticket Status:

Comment\*





# Features

## Ticket Classifier

Service Board List > Service Ticket

Service Ticket #2211 - Issue with Chrome Browser

Ticket | Tasks 0 | Configurations 0 | Products 0 | Activities 0 | Time 0 | Expenses 0 | Schedule

Summary: \* Issue with Chrome Browser

Age: 1m **CONTROL SESSION** **FOLLOW**

Company: IndigoStrawberry, Co.

Company:	* IndigoStrawberry, Co.	Site:	Main
Contact:	Ramon Stawiarz	Address 1:	2106 SHADYHILL TER
Ticket:	(813) 393-6413	Address 2:	
Email:	ramon.stawiarz@indigostrawberry.com	City:	Harrells
		State:	FL
		Zip:	34667
		Country:	

Ticket #2211

Board:	* Fast Response	SLA:	Standard SLA
Status:	* New	Agreement:	
Type:	Application	Predecessor:	
Subtype:	Chrome	Estimated Start Date:	
Item:	Failure	Due Date:	
Ticket Owner:	(Unassigned)	Duration:	

Service Board

Fast Response

Enabled  Update External System

Default Type: Must Change

Default Subtype: Must Change

Statuses: New

Types: Application

adobe

adobe, adobe-acrobat, adobe-creative-cloud, ado...



## Ticket Budgeter

**Time Budget Analysis**

Budget Hours:	7.06
Scheduled Hours:	0.00
Actual Hours:	0.00 0% Complete
Remaining Hours:	7.06

**Send Notes as Email**

- Contact:
- Resources:
- Cc:

**Resources & Meetings** SCHEDULE ME ASSIGN ME

Team: \* Teams Ruben Ticket Where: On-Site

Actions Check Availability Reschedule Resources

Ask Profile Insight **Admin** Hello, Ben

**Ticket Budgeter** Save

**Company**: Demo Company 2021 V2

**Integration**: ConnectWise

**Service Board**: Fast Response

**Calculation Method**: Standard Deviation Average

Update External System

**Statuses to Auto Budget\***: -- Select --

**Statuses to Auto Budget Against\***: -- Select --

**Max. Period to Search**: 6 Months



# Best Practices



# 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



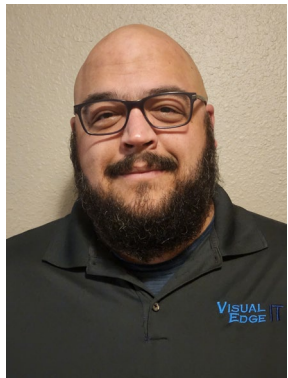
# Featured Customer

Nicholas Auxier

Director - Command Center

Visual Edge IT

Pendleton, IN



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.



## Coming Soon

- CrushBank Answer
- oData Feed (Open Data Protocol)



## CrushBank Answer

Ask Profile Insight **Admin** Hello, Dora CB Admin [Sign out](#)

CB Answer Save

**Company** Dora V2 - Do Not Delete (1140) **Integration** CW Test - Perficient

**Service Boards - Statuses** + Add Service Board

UX Service Board New, New (email)

**Document Sources**

**Integrations - Document Types** + Add Integration

Sharepoint - Customer Facing All

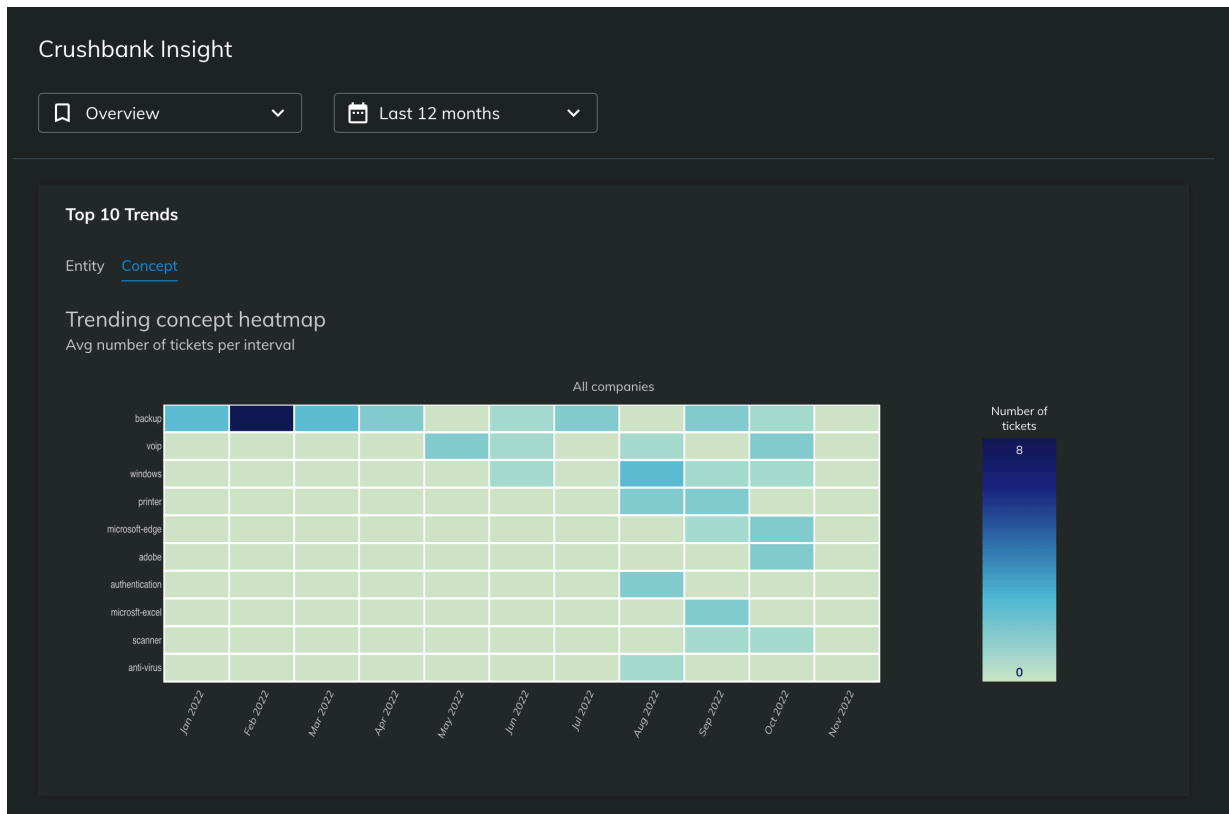
**Specific Documents** + Add Documents

Selected documents	Source	
How to print to a User Box from Microsoft Windows Vista using the PostScript plug-in.pdf	File Content	
How To Install Outlook 2019 On Windows 10.doc	IT Glue	



# Coming Soon

## oData Feed







# Q&A