

Customer Service Workflow Guide

BROUGHT TO YOU BY



WWW.HELPFLOW.COM | 24/7 LIVE CHAT AND CUSTOMER SERVICE TEAM FOR WEBSITES
(888) 600-5761 | CONTACT@HELPFLOW.NET

Your customer service agents have a lot to handle, with tickets constantly coming in and making sure your customers are happy. As a business owner, it's important to make sure your Customer Service Team is working effectively. Customer service is a major cost center, especially as you start to scale past one or two agents.

Think about this—a single agent that works 20% less effectively than it could be has a serious cost to your business. Anywhere from \$600-\$1000 per month of waste per agent depending on the rate you pay. And based on what we've seen, the effectiveness gap is way over 20%.

With just a few tweaks to the workflow your customer service team uses, you can drastically increase their efficiency.

At HelpFlow, we provide 24 / 7 live chat and customer service teams to over 100 e-commerce stores. After processing millions of tickets over more than five years, we learned how to be most effective as agents while keeping customers happy.



Measure the Metrics

Before you can focus on increasing efficiency, you have to actually measure what good customer experience and agent effectiveness look like. The most important metrics are **first response time, handle time, and customer satisfaction**.

When you increase your efficiency, this will drastically decrease handle time while keeping customer satisfaction the same or better due to faster response time.

If you're not tracking these metrics for the entire agent team as well as individual agents, start there

We created another resource that talks about basic KPIs that matter for CS and the meeting routine that we recommend to ensure that your agents are aware of their goals and actual performance. Click here to access our [CS KPI Guide](#).



Leverage Keyboard Shortcuts

Customer service agents have to move between software and browser tabs constantly.

- 1 They have to get into the helpdesk frequently to see the details of the ticket and update the ticket.
- 2 They also have to bounce back and forth from the helpdesk to Shopify to check on order status or other details.
- 3 They may also have to get into your project management system or slack to communicate with an internal team member about an issue.

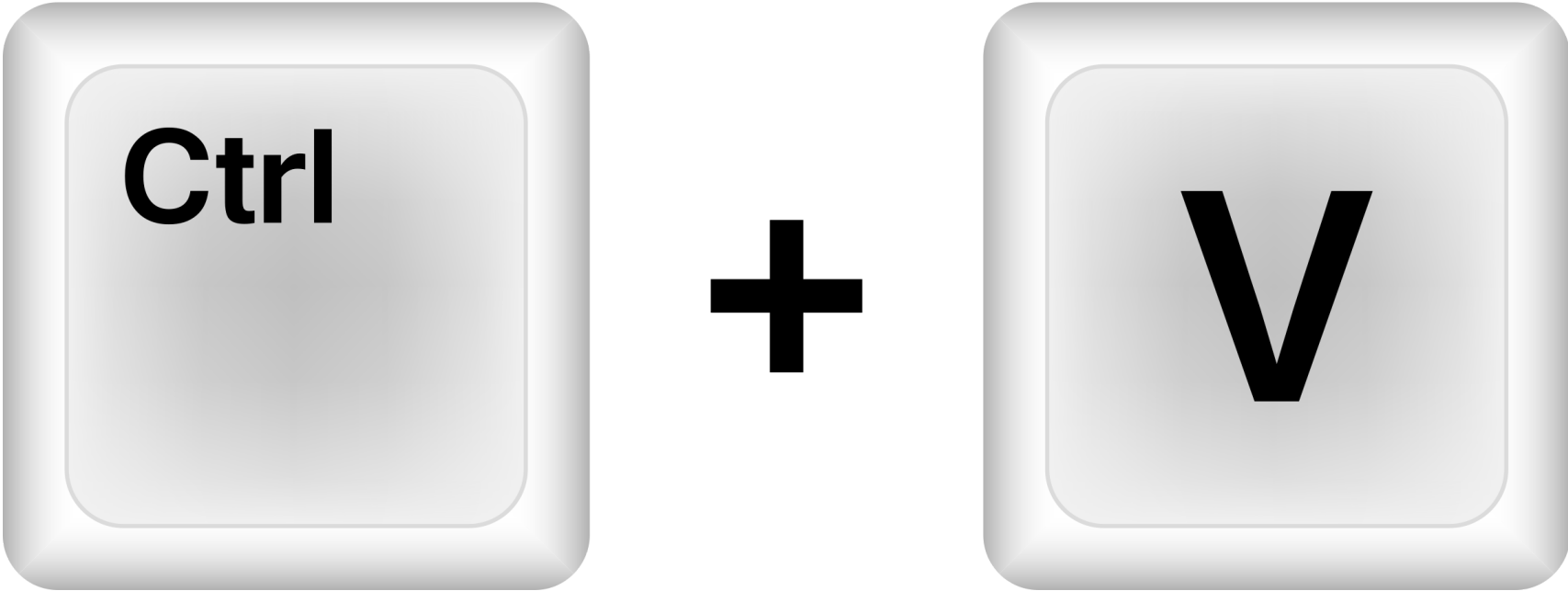
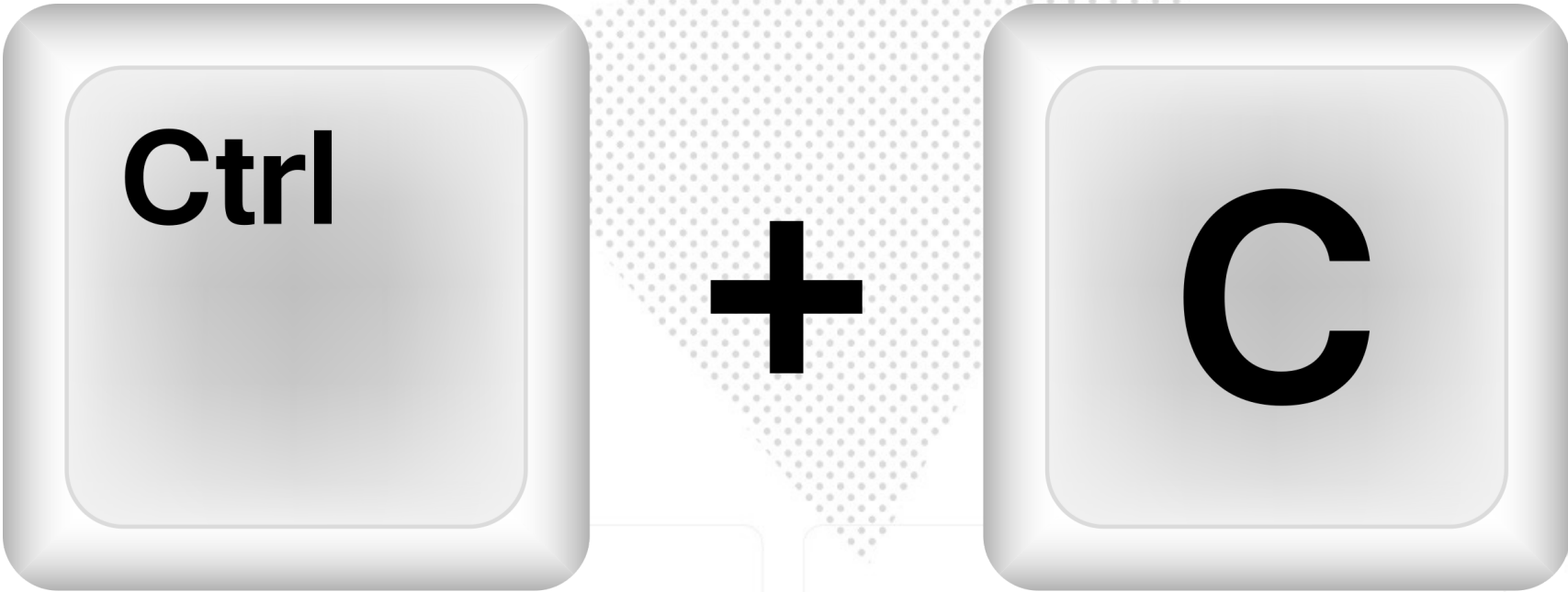
With so much movement between tools, you can massively increase efficiency by empowering your agents to make better use of keyboard shortcuts. This enables them to move much more quickly by navigating mostly without touching the mouse.



Leverage Keyboard Shortcuts

Here are some of the most common keyboard shortcuts that our agents personally use to improve their workflow:

- 1** You can automatically move between apps on your computer with a shortcut such as cmd + space + (type app name) + enter (on a mac).
- 2** In the web browser, you can rapidly move between tabs using a shortcut such as cmd + shift + [or] to move left and right (again, on a mac).
- 3** If you're looking for information in a ticket or on an order, you can use cmd + f + (type phrase) + enter to rapidly find the phrase on the page and scroll to it. This is helpful to find order numbers, tracking numbers, or other information that might be in a ticket.
- 4** Within the helpdesk, you can use keyboard shortcuts to reply to tickets, move between tickets, update ticket details and statuses, and more. The specific shortcuts depend on your helpdesk, but every industry-standard system has this.



When you put all of the shortcuts together to force yourself to get through the learning curve, the efficiency of how you work as an agent can be massively improved. Work with your team to identify the keyboard shortcuts they need to accomplish each of the above scenarios depending on what software they use, and help them through the learning curve. You'll both be happy being able to accomplish more in less time.

Leverage Keyboard Shortcuts

We compiled useful keyboard shortcuts for several apps commonly used by CS agents.

Global navigation

- g h** Go to the home view.
- g v** Go to the current view.
- z** Undo message sent

Views (Global)

- Right** Go to the next page.
- Left** Go to the previous page.
- Down / j** Go to the next item.
- Up / k** Go to the previous item.
- x** Toggle the highlighted item.
- Enter** Open the highlighted item.
- Alt + Down** Go to the next view.
- Alt + Up** Go to the previous view.

Views (Tickets)

- n** Create a new ticket.
- a** Open the assignee dropdown.
- t** Open the tags dropdown.
- m** Open the apply macro modal.
- o** Open selected tickets.
- c** Close selected tickets.
- #** Delete selected tickets.

Views (Customers)

- #** Delete selected customers.

Search

- s** Focus the search field.
- Esc** Leave search mode

Ticket page

- Left** Go to the previous ticket.
- Right** Go to the next ticket.
- j** Scroll to the next message.
- k** Scroll to the previous message.
- r** Focus on the reply area.
- f** Set reply to Forward.
- i** Set reply to Internal Note.
- c** Close the ticket.
- o** Open the ticket.
- #** Delete the ticket (send to trash).
- m** Show available macros for the ticket.
- a** Open the assignee dropdown.
- t** Open the tags dropdown.
- Esc** Close dialogs and unfocus inputs.
- Shift + Tab** Search macros while typing a response.
- * + Enter** Send message.
- * + Shift + Enter** Send message and close the ticket.

Macros

- Down** Go to the next macro.
- Up** Go to the previous macro.

Help dialog

- ?** Show this help dialog.

Navigating your admin panel

- G H** Go to Home
- G P P** Go to Products
- G N** Go to Analytics
- G D** Go to Discounts
- G A** Go to Apps
- G B C** Go to Abandoned checkouts
- G P I** Go to Products: Inventory
- G P C** Go to Products: Collections
- G W O** Go to Online Store: Overview
- G W P** Go to Online Store: Pages
- G W N** Go to Online Store: Navigation
- G T O** Go to Point of Sale: Overview
- G S G** Go to Settings: General
- G S C** Go to Settings: Checkout
- G S X** Go to Settings: Taxes
- G S I** Go to Settings: Gift Cards
- G S A** Go to Settings: Account
- G S T** Go to Settings: Point of Sale
- G S B** Go to Settings: Billing
- G O** Go to Orders
- G C** Go to Customers
- G M** Go to Marketing
- G L** Go to sales channels
- G S** Go to Settings
- G P T** Go to Products: Transfers
- G P O** Go to Products: Purchase Orders
- G P G** Go to Products: Gift Cards
- G W B** Go to Online Store: Blog posts
- G W T** Go to Online Store: Themes
- G W D** Go to Online Store: Domains
- G T L** Go to Settings: Locations
- G S P** Go to Settings: Payments
- G S S** Go to Settings: Shipping
- G S N** Go to Settings: Notifications
- G S F** Go to Settings: Files
- G S W** Go to Settings: Online Store
- G S L** Go to Settings: Sales Channels

General shortcuts

- ?** Keyboard help
- S** Focus search bar
- F** Focus Filter bar
- B Y E** Log out
- M E** Your profile
- O S** Open the store switcher

Adding items to your store

- A P** Add product
- A C** Add collection
- A D** Add discount
- A O** Add order
- A U** Add customer
- A B** Add blog post
- A L** Add blog
- A G** Add page



Leverage Keyboard Shortcuts

We compiled useful keyboard shortcuts for several apps commonly used by CS agents.



For Windows and Linux

TAB AND WINDOW SHORTCUTS	
Action	Shortcut
Open a new window	Ctrl + n
Open a new window in Incognito mode	Ctrl + Shift + n
Open a new tab, and jump to it	Ctrl + t
Reopen previously closed tabs in the order they were closed	Ctrl + Shift + t
Jump to the next open tab	Ctrl + Tab or Ctrl + PgDn
Jump to the previous open tab	Ctrl + Shift + Tab or Ctrl + PgUp
Jump to a specific tab	Ctrl + 1 through Ctrl + 8
Jump to the rightmost tab	Ctrl + 9
Open your home page in the current tab	Alt + Home
Open the previous page from your browsing history in the current tab	Alt + Left arrow
Open the next page from your browsing history in the current tab	Alt + Right arrow
Close the current tab	Ctrl + w or Ctrl + F4
Close the current window	Ctrl + Shift + w or Alt + F4
Minimize the current window	Alt + Space then n
Maximize the current window	Alt + Space then x
Quit Google Chrome	Alt + f then x

ADDRESS BAR SHORTCUTS	
Action	Shortcut
Search with your default search engine	Type a search term + Enter
Search using a different search engine	Type a search engine name and press Tab
Add www. and .com to a site name, and open it in the current tab	Type a site name + Ctrl + Enter
Open a new tab and perform a Google search	Type a search term + Alt + Enter
Jump to the address bar	Ctrl + l or Alt + d or F6
Search from anywhere on the page	Ctrl + k or Ctrl + e
Remove predictions from your address bar	Down arrow to highlight + Shift + Delete
Move cursor to the address bar	Control + F5

WEBPAGE SHORTCUTS	
Action	Shortcut
Open options to print the current page	Ctrl + p
Open options to save the current page	Ctrl + s
Reload the current page	F5 or Ctrl + r
Reload the current page, ignoring cached content	Shift + F5 or Ctrl + Shift + r
Stop the page loading	Esc
Browse clickable items moving forward	Tab
Browse clickable items moving backward	Shift + Tab
Open a file from your computer in Chrome	Ctrl + o + Select a file
Display non-editable HTML source code for the current page	Ctrl + u
Save your current webpage as a bookmark	Ctrl + d
Save all open tabs as bookmarks in a new folder	Ctrl + Shift + d
Turn full-screen mode on or off	F11
Make everything on the page bigger	Ctrl and +
Make everything on the page smaller	Ctrl and -
Return everything on the page to default size	Ctrl + 0
Scroll down a webpage, a screen at a time	Space or PgDn
Scroll up a webpage, a screen at a time	Shift + Space or PgUp
Go to the top of the page	Home
Go to the bottom of the page	End
Scroll horizontally on the page	Shift + Scroll your mousewheel
Move your cursor to the beginning of the previous word in a text field	Ctrl + Left arrow
Move your cursor to the next word	Ctrl + Right arrow
Delete the previous word in a text field	Ctrl + Backspace
Open the Home page in the current tab	Alt + Home
Reset page zoom level	Ctrl + 0

MOUSE SHORTCUTS	
Action	Shortcut
Open a link in a current tab (mouse only)	Drag a link to a tab
Open a link in new background tab	Ctrl + Click a link
Open a link, and jump to it	Ctrl + Shift + Click a link
Open a link, and jump to it (mouse only)	Drag a link to a blank area of the tab strip
Open a link in a new window	Shift + Click a link
Open a tab in a new window (mouse only)	Drag the tab out of the tab strip
Move a tab to a current window (mouse only)	Drag the tab into an existing window
Return a tab to its original position	Press Esc while dragging
Save the current webpage as a bookmark	Drag the web address to the Bookmarks Bar
Scroll horizontally on the page	Shift + Scroll your mousewheel
Download the target of a link	Alt + Click a link
Display your browsing history	Right-click Back or click & hold Back Right-click Next or click & hold Next
Switch between maximized and windowed modes	Double-click a blank area of the tab strip
Make everything on the page bigger	Ctrl + Scroll your mousewheel up
Make everything on the page smaller	Ctrl + Scroll your mousewheel down

GOOGLE CHROME FEATURE SHORTCUTS	
Action	Shortcut
Open the Chrome menu	Alt + f or Alt + e
Show or hide the Bookmarks bar	Ctrl + Shift + b
Open the Bookmarks Manager	Ctrl + Shift + o
Open the History page in a new tab	Ctrl + h
Open the Downloads page in a new tab	Ctrl + j
Open the Chrome Task Manager	Shift + Esc
Set focus on the first item in the Chrome toolbar	Shift + Alt + t
Set focus on the rightmost item in the Chrome toolbar	F10
Switch focus to unfocused dialog (if showing) and all toolbars	F6
Open the Find Bar to search the current page	Ctrl + f or F3
Jump to the next match to your Find Bar search	Ctrl + g
Jump to the previous match to your Find Bar search	Ctrl + Shift + g
Open Developer Tools	Ctrl + Shift + j or F12
Open the Clear Browsing Data options	Ctrl + Shift + Delete
Open the Chrome Help Center in a new tab	F1
Log in a different user or browse as a Guest	Ctrl + Shift + m
Open a feedback form	Alt + Shift + i

Leverage Keyboard Shortcuts

We compiled useful keyboard shortcuts for several apps commonly used by CS agents.

For Mac

ADDRESS BAR SHORTCUTS	
Action	Shortcut
Search with your default search engine	Type a search term + Enter
Search using a different search engine	Type a search engine name and press Tab
Add www. and .com to a site name, and open it in the current tab	Type a site name + Control + Enter
Add www. and .com to a site name, and open it in a new tab	Type a site name + Control + Shift + Enter
Open the website in a new background tab	Type a web address + ⌘ + Enter
Jump to the address bar	⌘ + l
Remove predictions from your address bar	Down arrow to highlight + Shift + fn + Delete Forward Delete or fn-Delete on a laptop
Move cursor to the address bar	Control + F5

GOOGLE CHROME FEATURE SHORTCUTS	
Action	Shortcut
Show or hide the Bookmarks Bar	⌘ + Shift + b
Open the Bookmark Manager	⌘ + Option + b
Open the Settings page in a new tab	⌘ + ,
Open the History page in a new tab	⌘ + y
Open the Downloads page in a new tab	⌘ + Shift + j
Open the Find Bar to search the current page	⌘ + f
Jump to the next match to your Find Bar search	⌘ + g
Jump to the previous match to your Find Bar search	⌘ + Shift + g
When Find Bar is open, search for selected text	⌘ + e
Open Developer Tools	⌘ + Option + i
Open the Clear Browsing Data options	⌘ + Shift + Delete
Log in as a different user, browse as a Guest, or access payment and password info	⌘ + Shift + m
Jump to the main menu bar	Control + F2
Cycle focus to unfocused dialog (if showing) and all toolbars	⌘ + Option + Up arrow or Down arrow

WEBPAGE SHORTCUTS	
Action	Shortcut
Open options to print the current page	⌘ + p
Open options to save the current page	⌘ + s
Open the Page Setup dialog	⌘ + Option + p
Reload your current page, ignoring cached content	⌘ + Shift + r
Stop the page loading	Esc
Browse clickable items moving forward	Tab
Browse clickable items moving backward	Shift + Tab
Open a file from your computer in Google Chrome	⌘ + o + Select a file
Display non-editable HTML source code for the current page	⌘ + Option + u
Open the JavaScript Console	⌘ + Option + j
Save your current webpage as a bookmark	⌘ + d
Save all open tabs as bookmarks in a new folder	⌘ + Shift + d
Turn full-screen mode on or off	⌘ + Ctrl + f
Make everything on the page bigger	⌘ and +
Make everything on the page smaller	⌘ and -
Return everything on the page to the default size	⌘ + 0
Scroll down a webpage, a screen at a time	Space
Scroll up a webpage, a screen at a time	Shift + Space
Search the web	⌘ + Option + f
Move your cursor to the beginning of the previous word in a text field	Option + Left arrow
Move your cursor to the back of the next word in a text field	Option + Right arrow
Delete the previous word in a text field	Option + Delete
Open your home page in the current tab	⌘ + Shift + h
Reset page zoom level	Command + 0

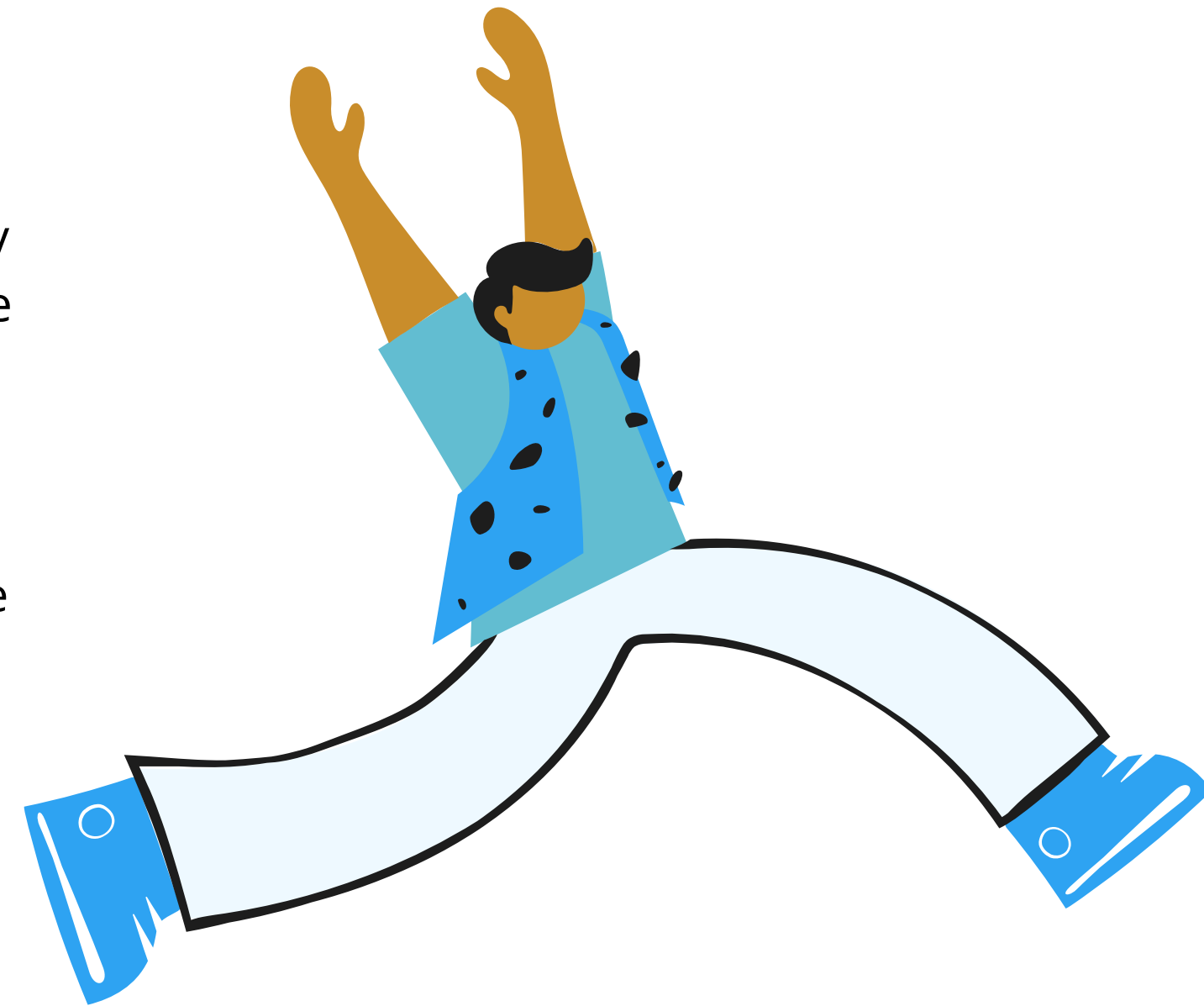
MOUSE SHORTCUTS	
Action	Shortcut
Open a link in a current tab (mouse only)	Drag a link to a tab
Open a link in new background tab	⌘ + Click a link
Open a link, and jump to it	⌘ + Shift + Click a link
Open a link, and jump to it (mouse only)	Drag a link to a blank area of the tab strip
Open a link in a new window	Shift + Click a link
Open a tab in a new window (mouse only)	Drag the tab out of the tab strip
Move a tab to a current window (mouse only)	Drag the tab into an existing window
Return a tab to its original position	Press Esc while dragging
Save the current webpage as a bookmark	Drag the web address to the Bookmarks Bar
Download the target of a link	Option + Click a link
Display your browsing history	Right-click Back or click & hold Back Right-click Next or click & hold Next
Increase the window to full height	Double-click a blank area of the tab strip



WHAT TO DO NOW?

If you're a successful e-commerce brand, it's extremely important that you successfully scale the people side of the business and that includes training your people to become more efficient so that they can take on more work. As a next step:

- Update your training program to include modules about workflow. Then have your current CS agents go thru them. Do not expect to see results right away since you are teaching them to learn the discipline of using keyboard shortcuts and it may take some time to get used to it but sooner or later, you will see the improvements in their productivity.
- As you take on new team members, ensure that they learn the standard workflow. Having a standard workflow across your customer service team ensures that each member of your team is doing things efficiently and they will get to improve over time as that get very familiar on your standard workflow.



Book A Strategy Call

We'd also be happy to do a Customer Service Audit with you. While we do this primarily with clients considering us to help run their customer service operation, you'll find that it will give you insanely deep insights into the performance of your customer service operation and how to improve it. Even if we don't work together for now, it's a good use of time to go through.

Book a Strategy Call with us today!

Customer Service Workflow Guide

BROUGHT TO YOU BY



WWW.HELPFLOW.COM | 24/7 LIVE CHAT AND CUSTOMER SERVICE TEAM FOR WEBSITES
(888) 600-5761 | CONTACT@HELPFLOW.NET