📄 ABC Pvt. Ltd.

CloudDesk – SaaS Product User Manual

Version 2.3
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1. Introduction

CloudDesk is a cloud-based customer support and knowledge management platform developed by **ABC Pvt. Ltd.**

CloudDesk helps businesses:

- Manage customer tickets

- Store internal documentation

- Automate support workflows

- Generate AI-powered responses

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2. Key Features

2.1 Ticket Management

- Create, assign, and track support tickets

- Priority tagging (Low, Medium, High, Critical)

- SLA tracking and notifications

2.2 Knowledge Base

- Create and organize help articles

- Categorize content by department

- Internal and public visibility settings

2.3 AI Assistant

- Auto-suggest replies

- Summarize tickets

- Generate knowledge base drafts

- Context-aware responses

2.4 Analytics Dashboard

- Ticket resolution time

- Agent performance metrics

- Customer satisfaction (CSAT) reports

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3. Subscription Plans

3.1 Basic Plan

- Up to 5 agents

- 1,000 tickets per month

- Email support

- Basic analytics

- Standard knowledge base

- ❌ No third-party integrations

- ❌ No API access

3.2 Pro Plan

- Up to 25 agents

- Unlimited tickets

- Priority email & chat support

- Advanced analytics

- Third-party integrations (Slack, Zapier, CRM)

- API access

- Custom reporting

3.3 Enterprise Plan

- Unlimited agents

- Dedicated account manager

- 24/7 priority support

- Advanced security controls (SSO, SAML)

- Custom SLA agreements

- On-premise deployment option

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4. Account Setup

4.1 Creating an Account

1. Visit the CloudDesk website.

2. Click on **Sign Up**.

3. Enter business email and password.

4. Verify email address.

5. Select subscription plan.

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5. Data Management

5.1 Exporting Data

Users can export their data by:

1. Navigating to **Settings** → **Data Management**

2. Clicking **Export Data**

3. Selecting format (CSV or JSON)

4. Confirming export

A download link will be emailed within 10 minutes.

5.2 Data Retention

- Basic Plan: 6 months retention

- Pro Plan: 2 years retention

- Enterprise Plan: Custom retention policy

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6. Integrations

CloudDesk supports integrations with:

- Slack (Pro & Enterprise only)

- Zapier (Pro & Enterprise only)

- Salesforce (Enterprise only)

- REST API (Pro & Enterprise only)

⚠️ The **Basic Plan does NOT support integrations.**

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7. Troubleshooting Guide

7.1 Unable to Login

- Ensure correct email and password

- Reset password using "Forgot Password"

- Clear browser cache

- Contact support if issue persists

7.2 Tickets Not Updating

- Refresh dashboard

- Check internet connection

- Ensure ticket status filters are not enabled

7.3 Integration Not Working

- Verify subscription plan supports integration

- Reconnect integration from Settings

- Check API keys

- Contact support

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8. Security & Compliance

CloudDesk ensures:

- End-to-end encryption

- Role-based access control

- Regular security audits

- GDPR compliance

- Daily backups

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9. Support Channels

Plan	Support Type
Basic	Email only
Pro	Email + Chat
Enterprise	24/7 Priority

Contact: support@clouddesk.ai