Helpdesk Ticket Guide

When a ticket is created, all the admins linked to the department of the ticket, are notified, by email, that a ticket has been created and must be attended to. An admin must then go to the 'Helpdesk Ticket list', view the ticket and then assign the ticket to him/herself, or another relevant party to deal with the ticket. After the ticket has been assigned to the admin, the ticket needs to be updated and check that all the relevant information is correct.

The admin can communicate with the client using the notes or alternatively call the client. Attachments can also be submitted. (However, note that users cannot submit and see attachments at this stage.) When a ticket has been resolved the ticket details must be updated and the ticket must be closed (closed meaning that no further attention is required). Once the ticket is closed the user will be notified. However, the ticket will still be visible on the Helpdesk ticket list but it will be grayed out.

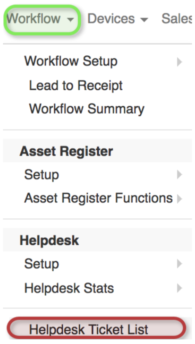
1. How are tickets created?

Tickets can be created in the following different ways:

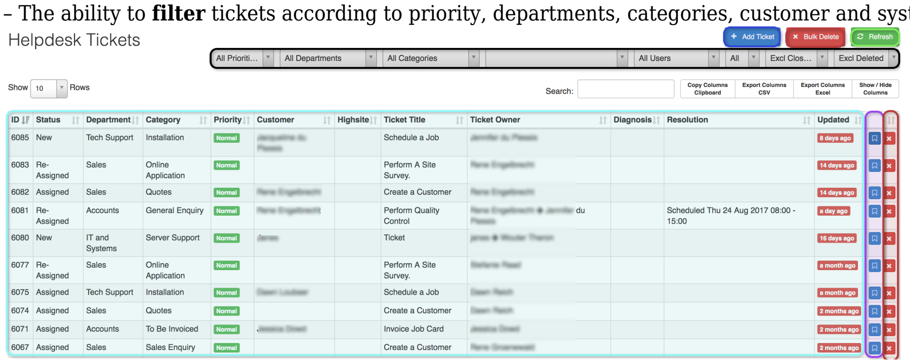
- When the customer sends an email to the department (e.g. accounts/support/sales etc.)
- When a ticket is manually created by a staff member.
- When a customer logs a ticket from their online profile.
- Through the CRM API connection (if it is set up).

2. Where do I find the tickets?

· Click on **Workflow** –> **Helpdesk Ticket list**



This page gives you a:
– **quick summary** of all tickets.
– The ability to **add** or **delete** tickets
– The ability to **view** and **update** tickets
– The ability to **filter** tickets according to priority, departments, categories, customer and system users.



3. Editing and updating tickets:

3.1 . Viewing the ticket

By viewing the helpdesk tickets you:

– Can easily access different **lists of other tickets**

– You can also "**assign**", "**link**", "**print**", "**delete**", "**close**" and "**reload**" the ticket.

– Will see a "**conversation view of all the notes** that have been posted about the ticket.

– You are able to **add notes, attachments and other files** to the ticket.

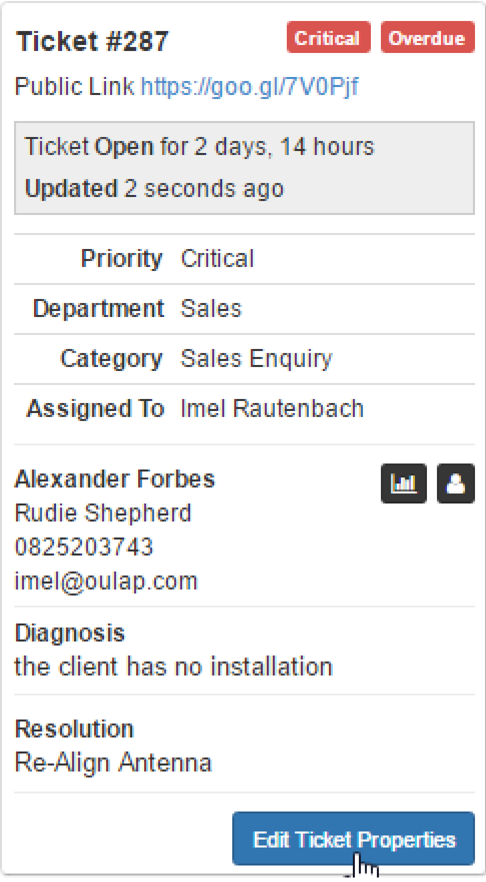
– View and edit **ticket properties** as well as see any **calendar events, job cards and checklists** assigned to the ticket.

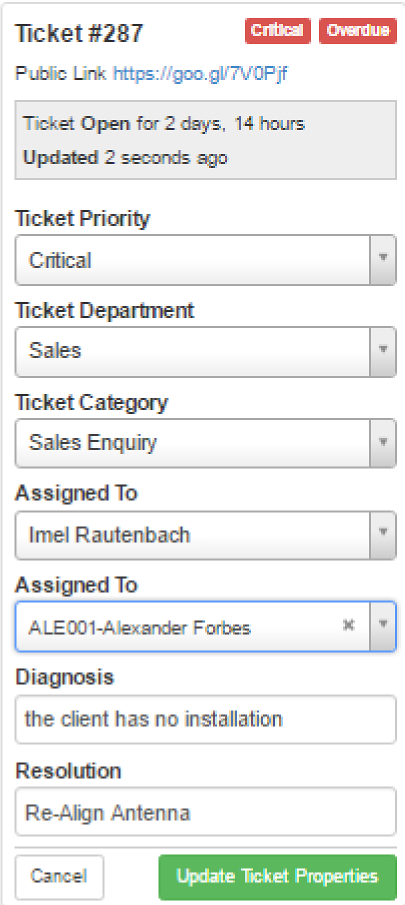
3.2. Ticket management features:

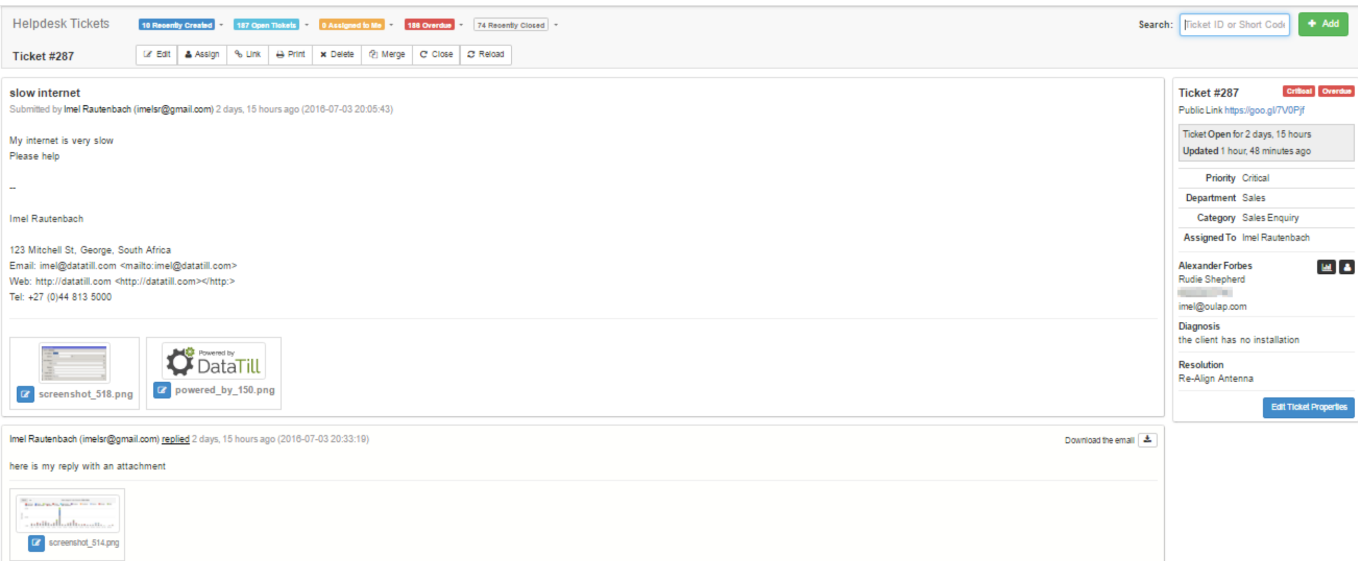
- **Edit** – Diagnosis and Resolution are edited here.
- **Assign** – Tickets must be assigned to the admin dealing with the ticket.
- **Print** – This function will allow you to print the ticket.
- **Link** – Tickets of the same problem can be linked, but the tickets are still separate, so when the problem is solved all of the tickets still need to be updated and closed.
- **Delete** – The ticket can only be deleted if the ticket is open. Even though the ticket can be deleted, it will not completely disappear from the system and can still be searched.
- **Close** – to signify that the problem has been resolved or no further action is required.
- **Merge** – This function will be used for customers who have sent multiple tickets relating to the same problem. All tickets will be merged and you will only have one ticket.

- Every time information is updated in a ticket the client is sent an email and SMS notifying him/her that changes have been made.
- Notes (Notes are used to communicate with the user, e.g. request additional information about the query, alternatively the client can just be called.)
- Attachments can be added to tickets (pictures are previewed)(Note that clients cannot view attachments
- New tickets can be created by using the "+Add" button
- A full history is kept of any changes made to the ticket, including who made the changes.

To the right, you will see ticket properties. Here all the basic information like the priority, department, category and who the ticket was assigned to is given. Then the diagnosis and resolution are also given. You can also click **'Edit Ticket Properties'** to make changes such as Ticket Priority, Ticket Department, Ticket Category, Assigned To, Diagnosis and Resolution. Click 'Update Ticket Properties' to let the changes take effect.


Ticket #287
Critical
Overdue
Public Link https://goo.gl/7V0Pjf
Ticket Open for 2 days, 14 hours
Updated 2 seconds ago
Priority Critical
Department Sales
Category Sales Enquiry
Assigned To Imel Rautenbach
Alexander Forbes
Rudie Shepherd
0825203743
imel@oulap.com
Diagnosis
the client has no installation
Resolution
Re-Align Antenna
Edit Ticket Properties


Ticket #287
Critical
Overdue
Public Link https://goo.gl/7V0Pjf
Ticket Open for 2 days, 14 hours
Updated 2 seconds ago
Ticket Priority
Critical
Ticket Department
Sales
Ticket Category
Sales Enquiry
Assigned To
Imel Rautenbach
Assigned To
ALE001-Alexander Forbes
Diagnosis
the client has no installation
Resolution
Re-Align Antenna
Cancel
Update Ticket Properties


Helpdesk Tickets
Ticket #287
Search:
slow internet
My internet is very slow
Please help
Imel Rautenbach
123 Mitchell St, George, South Africa
Ticket #287
Priority Critical
Department Sales
Category Sales Enquiry
Assigned To Imel Rautenbach
Alexander Forbes
Rudie Shepherd
imel@oulap.com
Diagnosis
the client has no installation
Resolution
Re-Align Antenna
Edit Ticket Properties
here is my reply with an attachment

Guide on how to use Tickets.

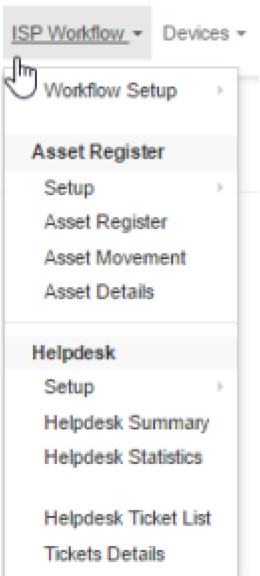
1. How the client creates a ticket.
2. How to view all the tickets.
3. How to create a ticket.
4. How view ticket details.
5. How to edit the ticket.
6. How to assign a ticket.
7. How to link a ticket.
8. How to delete a ticket.
9. How to duplicate a ticket.
10. How to close a ticket.
11. How to reopen a ticket.
12. How to add Notes to a ticket.
13. How to add Attachments to a ticket.
14. How to change the diagnose of a ticket.
15. How to change the resolution of a ticket.
16. How to change the ticket information.

1. How the client creates a Ticket

The client creates a ticket by logging into their client account on your HeroTill site and clicks on the “Helpdesk Tickets” button and then clicks on the “+ Submit a new Ticket” button.

2. How to view all the Tickets

ISP Workflow->Helpdesk->Helpdesk Ticket List



3. How to create a ticket

1. ISP Workflow->Helpdesk->Helpdesk Ticket List
2. Click on “+Add Ticket”

4. How view a ticket details

1. ISP Workflow->Helpdesk->Helpdesk Ticket List
2. Click on the “View Ticket Details” Icon

5. How to edit the ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “Edit“ button

6. How to assign a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the Assign Icon
3. Note that there is also the option to assign a ticket while editing a ticket (Refer to How to edit a Ticket)
4. In order to assign a Ticket to a user, the user must be a user of a Helpdesk department. To add a user to a Helpdesk department go to Helpdesk Departments -> Setup -> Helpdesk Departments-> Edit the department (you would like to add a user to) -> Users (tab) -> add the user to the department.

7. How to link a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “Link” button

8. How to delete a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “Delete” button
3. Note that if the Ticket is closed, it is not possible to delete a ticket, if closed a ticket must be reopened in order to delete it.

9. How to duplicate a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “Link” button

10. How to close a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “close” button
3. Note if a ticket is closed, the option to close a ticket will not be available. However the option to “reopen” the ticket will be present. Please also refer to “How to reopen a ticket”.

11. How to reopen a ticket

1. View a ticket (refer to How to view a ticket)
2. If a ticket has not been closed, it the option to reopen a ticket will not be available.

12. How to add Notes to a ticket

1. View a ticket (refer to How to view a ticket)
2. Below all the ticket information is the option to add notes to the ticket.
3. Notes can only be added if the Ticket is Open.

13. How to add Attachments to a ticket

1. View a ticket (refer to How to view a ticket)
2. Below the Notes of the ticket is the option to add attachments.
3. Note that clients cannot view or submit attachments at this stage.
4. Attachments can only be added if the Ticket is open.

14. How to change the diagnose of a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “edit” ticket button, which is above ticket information
3. Go the “Ticket Diagnoses field”
4. Don’t forget to click on update

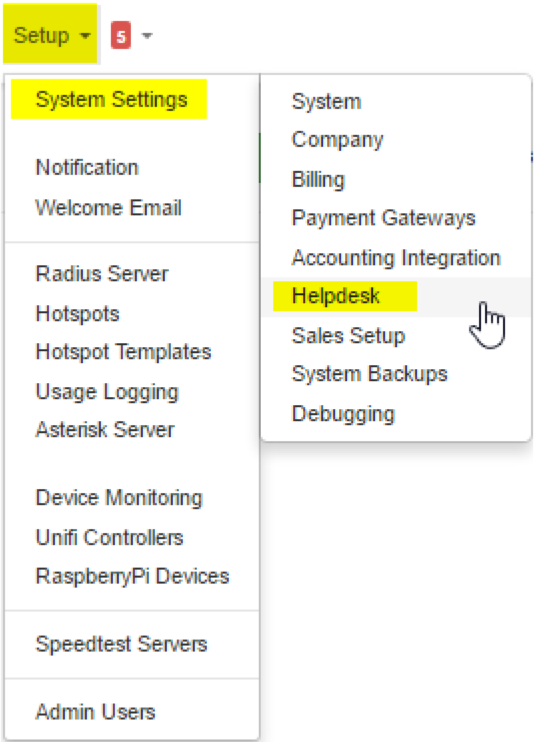
15. How to change the resolution of a ticket

1. View a ticket (refer to How to view a ticket)
2. Click on the “edit” ticket button, which is above ticket information.
3. Go the “Ticket Resolution” field
4. Don’t forget to click on Update

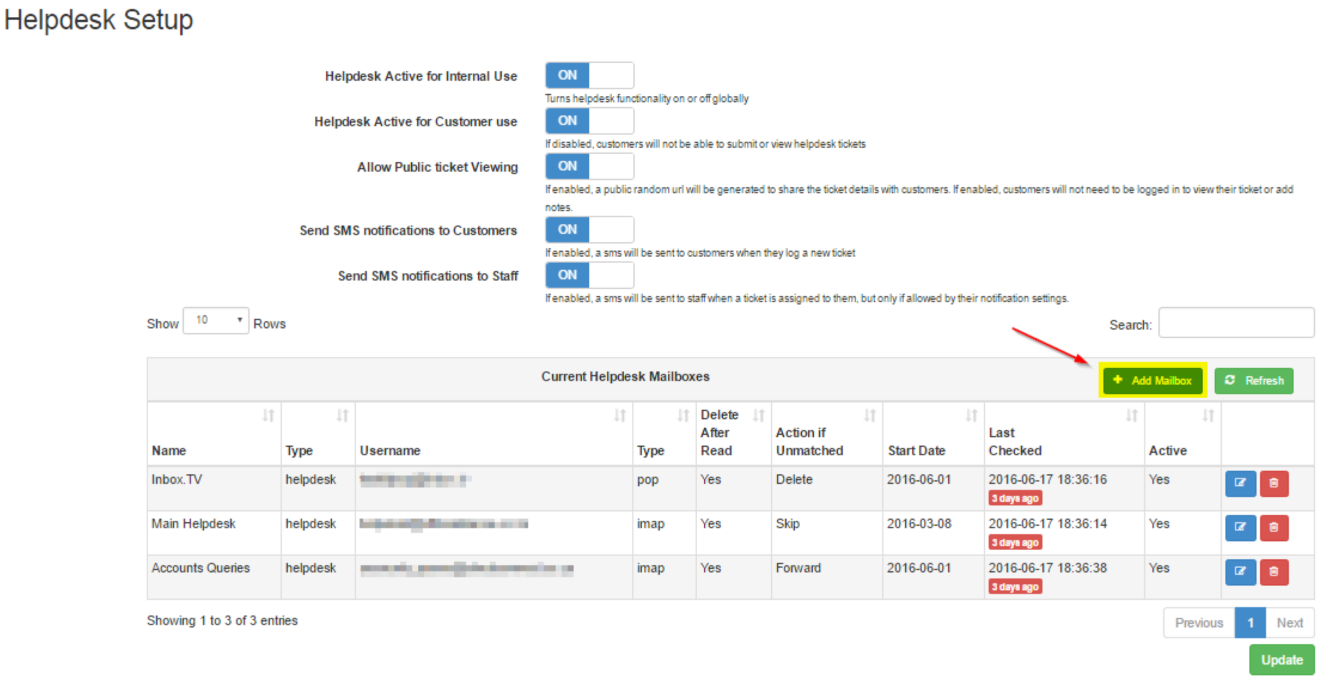
16. How to change the ticket information

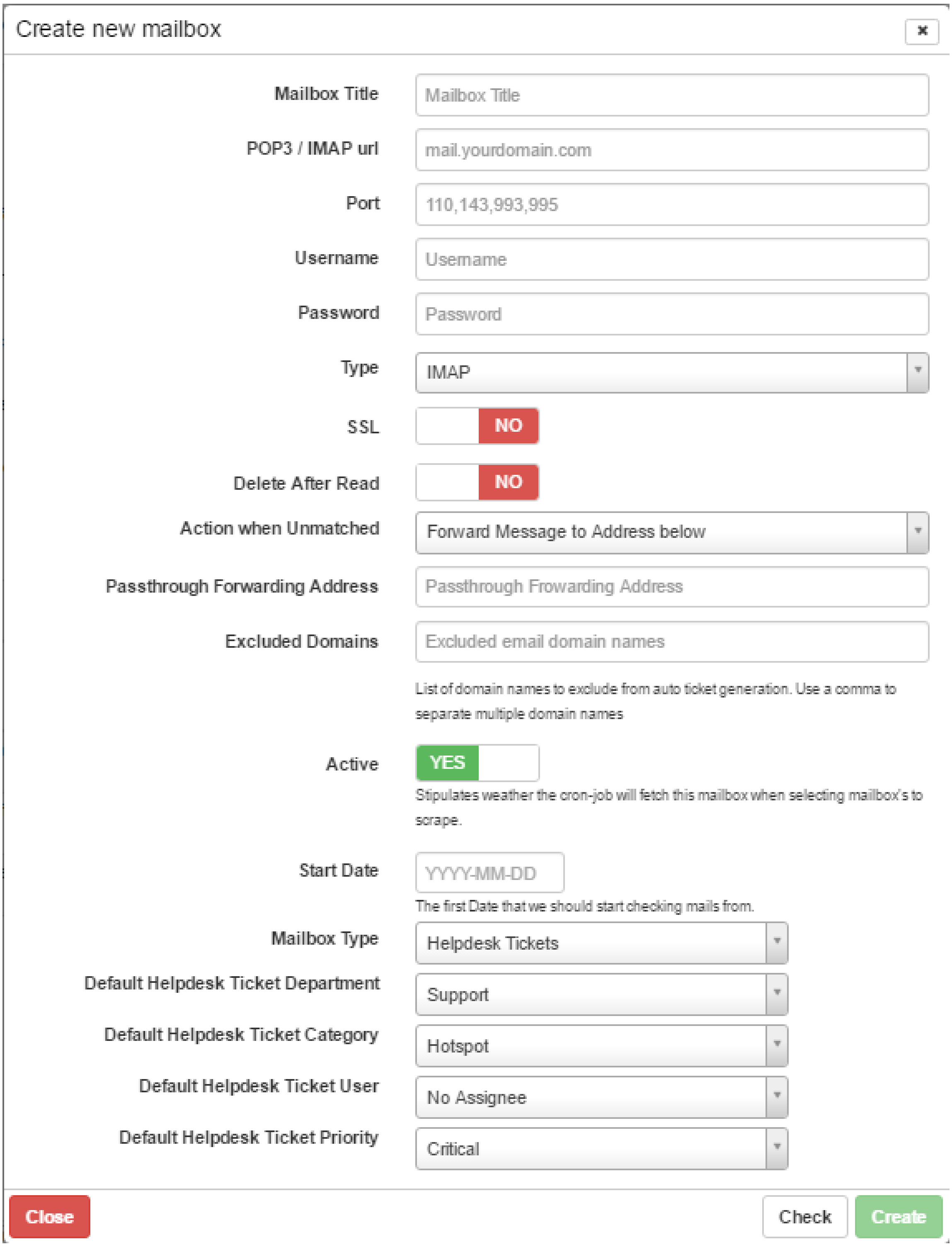
1. View a ticket (refer to How to view a ticket)
2. Click on the “edit” ticket button, which is above ticket information

17. Helpdesk Mailbox Setup This is where you can manage what email addresses will receive help desk ticket notifications.



1. Start out by going to “Setup -> System Settings -> Helpdesk
2. Then click on add mailbox.
3. Type in all information needed for the email login. Also assign the correct Mailbox Type, Default Helpdesk Ticket Department, Default Helpdesk Ticket Category, Default Helpdesk Ticket User, Default Helpdesk Ticket Priority.


Helpdesk Setup
Helpdesk Active for Internal Use
ON
Turns helpdesk functionality on or off globally
Helpdesk Active for Customer use
ON
If disabled, customers will not be able to submit or view helpdesk tickets
Allow Public ticket Viewing
ON
If enabled, a public random url will be generated to share the ticket details with customers. If enabled, customers will not need to be logged in to view their ticket or add notes.
Send SMS notifications to Customers
ON
If enabled, a sms will be sent to customers when they log a new ticket
Send SMS notifications to Staff
ON
If enabled, a sms will be sent to staff when a ticket is assigned to them, but only if allowed by their notification settings.
Show 10 Rows
Search:
Current Helpdesk Mailboxes
Add Mailbox
Refresh
Name
Type
Username
Type
Delete After Read
Action if Unmatched
Start Date
Last Checked
Active
Inbox.TV
helpdesk
pop
Yes
Delete
2016-06-01
2016-06-17 18:36:16
3 days ago
Yes
Main Helpdesk
helpdesk
imap
Yes
Skip
2016-03-08
2016-06-17 18:36:14
3 days ago
Yes
Accounts Queries
helpdesk
imap
Yes
Forward
2016-06-01
2016-06-17 18:36:38
3 days ago
Yes
Showing 1 to 3 of 3 entries
Previous
1
Next
Update


Create new mailbox
Mailbox Title
Mailbox Title
POP3 / IMAP url
mail.yourdomain.com
Port
110,143,993,995
Username
Username
Password
Password
Type
IMAP
SSL
NO
Delete After Read
NO
Action when Unmatched
Forward Message to Address below
Passthrough Forwarding Address
Passthrough Frowarding Address
Excluded Domains
Excluded email domain names
List of domain names to exclude from auto ticket generation. Use a comma to separate multiple domain names
Active
YES
Stipulates weather the cron-job will fetch this mailbox when selecting mailbox's to scrape.
Start Date
YYYY-MM-DD
The first Date that we should start checking mails from.
Mailbox Type
Helpdesk Tickets
Default Helpdesk Ticket Department
Support
Default Helpdesk Ticket Category
Hotspot
Default Helpdesk Ticket User
No Assignee
Default Helpdesk Ticket Priority
Critical
Close
Check
Create