iSERV AGENT AND ADMIN PANEL [Web Portal]

Version 1.0

YOUR SMART SERVICE AND TICKETING APPLICATION

ITHENA

4470 Cox Road #275

Glen Allen, Virginia 23059, USA

MANUAL OVERVIEW

This User Guide describes the configuration and settings of iSERV's web portal. This web portal gives a myriad of menus, filters, setting options and flexibility for effectively managing tickets, agents, and content management thereby establishing better collaboration for quick resolution of issues between Operators/Technicians and OEM's service team. The manual explains as to how to use and configure/use the modules designed for an Administrator and Agent (who also can simultaneously have administrator access). The Admin Panel consists of the following:

- **Settings Tab-** This tab contains several menu options which basically allows to define how the web based portal and mobile application should work in tandem based on the ticket and other configuration settings. Task alerts can be defined from the level of department to team members. Agent's password expiration policy with multifactor authentication facility is available. There is provision for User login settings for accessing tickets and associating email templates. Documents setting allows administrator to grant access to articles, and using canned responses when replying to tickets.

- **Manage Tab-** The tab consists of several filter options for tickets, creating Service Level Agreements (SLA) plans to define time period for ticket closure along with creating schedules to define hours of operations. Site pages can be managed which the end-users will view at various points on the client portal along with customizing forms for amending to tickets, user profile or a customer. Admin can create custom lists for capturing specific information from end users and agents when creating tickets.

- **Emails Tab**- It has provisions to configure settings for an email so that the system can fetch mails and create tickets. The application allows configuring incoming, outgoing and email fetching settings. Admin can decide to ban email addresses to prevent tickets from being created. Stock messages from iSERV can be sent out to agents and end users during specific events of a tickets life cycle.

- **Agents Tab-** The section enables Admin to grant access to agents for responding and resolving the tickets. Agents can be assigned to a specific department. Teams feature allows admin to pull agents from different departments and organize them to handle specific issues or users. Through Roles, permissions are granted to agents per department they have actual access. There are settings at department level since tickets are routed through them.

- **Equipment Tab**- This allows creation and categorization of various equipment procured by a customer. Tickets to be raised can even be associated with an equipment.

- **Provisions Tab**- Equipment procured needs to be handed off to an end-user, or end-user team, for their specific use in a functional manner. The section allows admin to ensure that right operators/users have access to the necessary equipment and infrastructure.

Agent is someone who handles tickets and works with user problems. An Agent can view, respond to and assign tickets, as well as modify ticket properties. In some cases, the Admin can additionally act as an agent and vice versa. Agents with access to the Admin Panel can grant additional agents access to this panel for global configurations. The Agents Panel comprises of:

- **Dashboard Tab**- It gives an overview of tickets. The data can be filtered by date as well as departments, equipment, and agents. Additionally, it gives an overall customer satisfaction score and metrics for each ticket status.

- **Customers Tab**- Allows creation of customers or organizations who shall access the application. Further users of the customer can also be added via importing a csv file or simply copy/pasting the names and email addresses on any text editor.

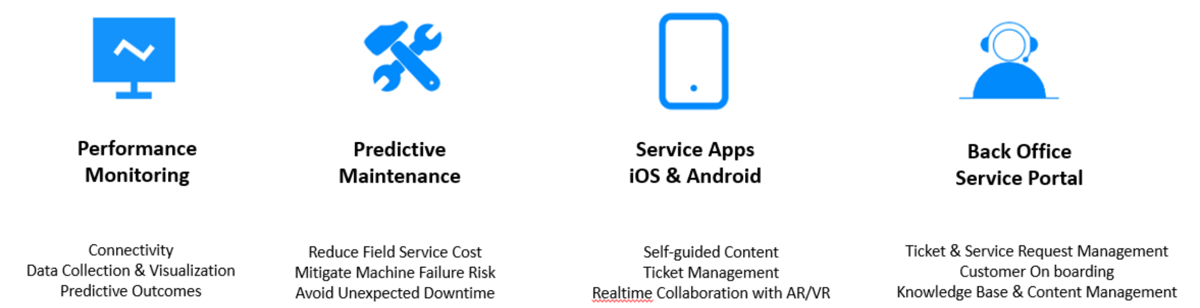
- **Tasks Tab**- Displays the to-do list of tasks for an agent associated with a ticket.

- **Tickets Tab**- Displays the list of tickets assigned to an agent based on his department and even group assignments. An agent can reply back by typing their response for a ticket or even order parts related to a ticket through eCommerce website's integrated link. Additionally, facility to schedule appointment for issue resolution is also available.

- **Equipment Tab**- Allows an agent to view the equipment that are provisioned. One can also quickly access or add documents associated with the equipment.

- **Documents Tab**- The section allows an agent to create document categories, view all the documents associated with an equipment, and create canned responses.

Simply follow the **clickable navigation from the below Table of Contents** section for quick and easy access to comprehensive information on how to effectively use iSERV for self-servicing and keep a track of issues and fixes to ensure that there are no blockades restricting you to accomplish your business goals. For the latest information about iSERV, visit https://www.iserv.ai/



Being a web based portal, iSERV is easy to access, doesn't need separate installation, and just needs a browser (latest versions of Microsoft Edge, Google Chrome or Mozilla Firefox) with strong internet connectivity.

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INTRODUCTION

iSERV is a support ticket system. It comprises of a web portal and a service mobile app that has integration with Vuforia Chalk for Augmented Reality based remote assistance. iSERV seamlessly routes inquiries created via email, web-forms and phone calls into a simple, easy-to-use, multi-user, web-based customer support platform. The AR powered remote assistance brings technicians and multiple experts together for real-time problem-solving and collaboration.

The web based service portal basically allows configuring iSERV to a customer's specific needs so that it seamlessly integrates inquiries created via email as well as via phone app, and web-based forms into a simple easy-to-use multi-user web interface.

FEATURES

Ticket Filters Define rules as part of ticket management system. By using the filter system, iSERV empowers you to automate the creation and routing of tickets. Set actions such as ticket alerts, setting priority or SLA for managing how long a ticket can remain open, configuring attachments, sending alerts when a new ticket is raised, or even sending an associated canned auto response.	**Customize Ticket Queues and View Columns** iSERV allows to specify and set conditions and criteria to manage ticket queues for viewing purposes. It allows the administrator to create views of tickets and specify what information one would like to see based on a customer's requirement. Using custom columns allows to set the dashboard view for viewing ticket list.
Assign, Transfer Transfer tickets between departments to ensure they are handled by the correct agents, or assign tickets to a particular agent or a team of agents. Refer a ticket to maintain view-only access to tickets when transferred or assigned to a department/agent. One can reassign tickets to agents or a team of agents or transfer to a different department all together. Transfer, Assignment, and Referral notes are logged in the ticket thread to keep track of what's happened in the ticket	**Service Level Agreements** SLA Plans allows one to track tickets and due dates without any hassles! iSERV generates overdue alerts and notices on missed due dates, and priority escalation. It allows creating an unlimited number of SLA Plans and assigning them to departments or ticket filters.
User Portal Users can login using their email address and a ticket number or they can register a profile for full access to all tickets they are associated with.	**Equipment & Provision** iSERV helps create equipment related details and specifying ticket generation details for that equipment's make and model. The application further helps tracking and associating of the equipment procured/commissioned for a particular site and generating unique QR codes. These QR codes can be quickly scanned through supporting mobile app to retrieve every detail of that equipment for quick remote assistance.

TUTORIAL

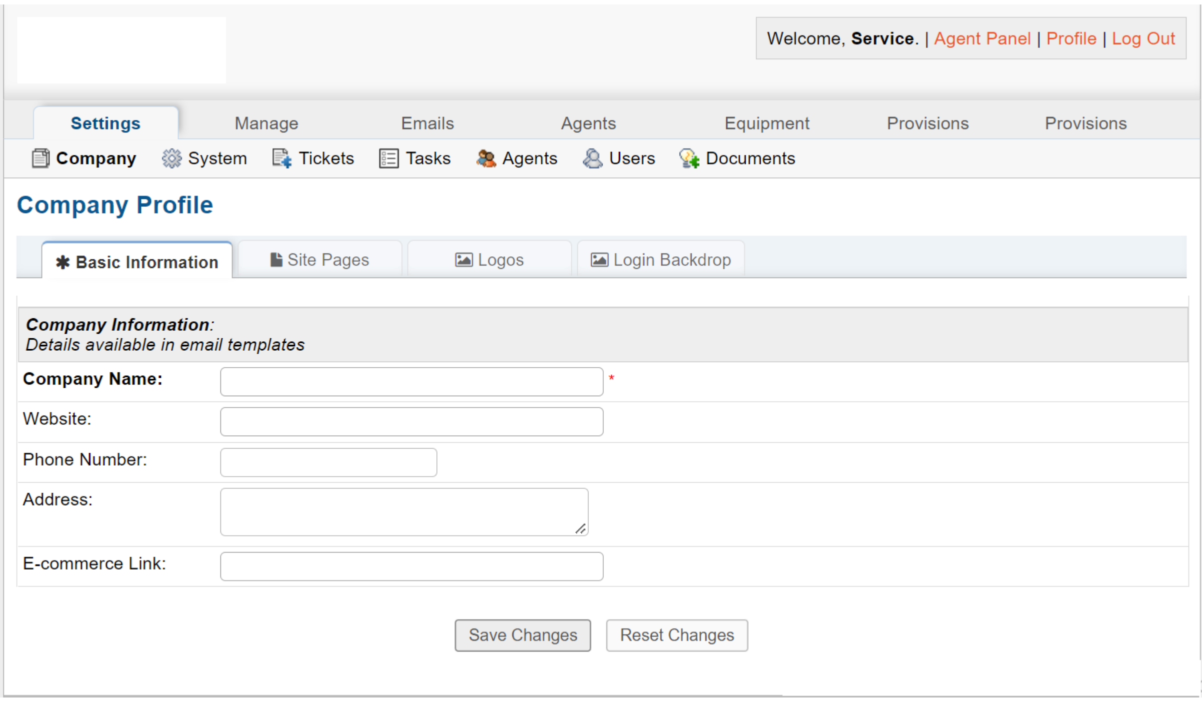
ADMIN PANEL

SETTINGS TAB

Company Settings

Admin Panel > Settings > Company

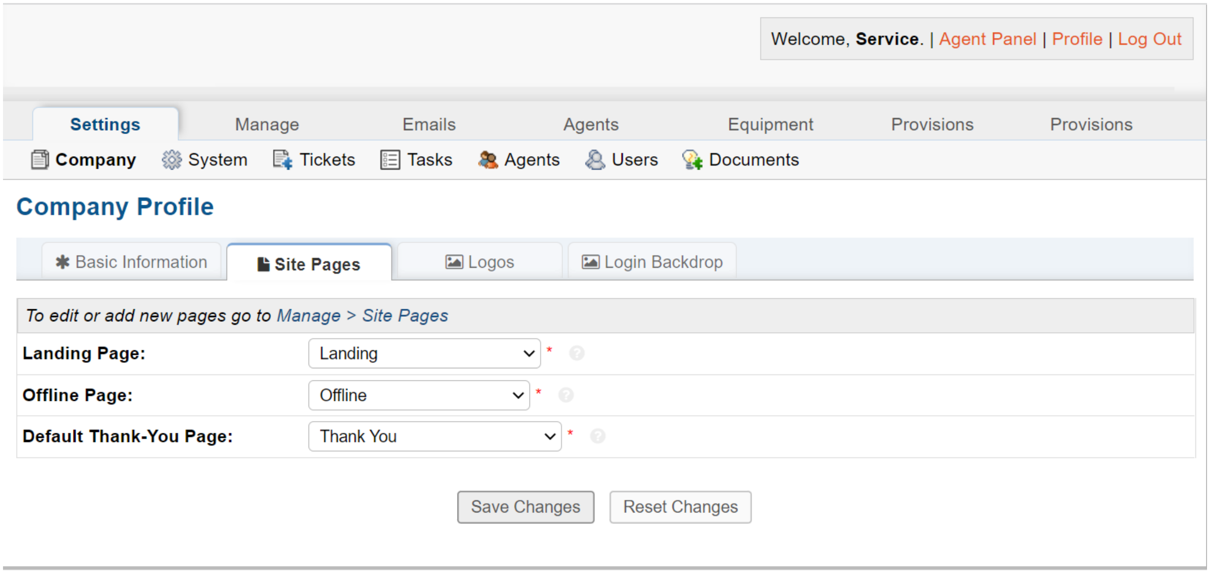
Basic Information



This tab contains the information that will be pulled into the email templates for the help desk company information, including Company Name, address, etc. Custom Fields can be added to the Company Information built-in form located at Admin Panel > Manage > Forms.

E-commerce Link allows you to specify the location of your personal e-commerce website created, for ordering/re-ordering parts as part of maintenance/damage. Through Agent's panel, within Tickets tab, an Agent/user can directly access this webpage once the URL is specified here to order parts.

Site Pages



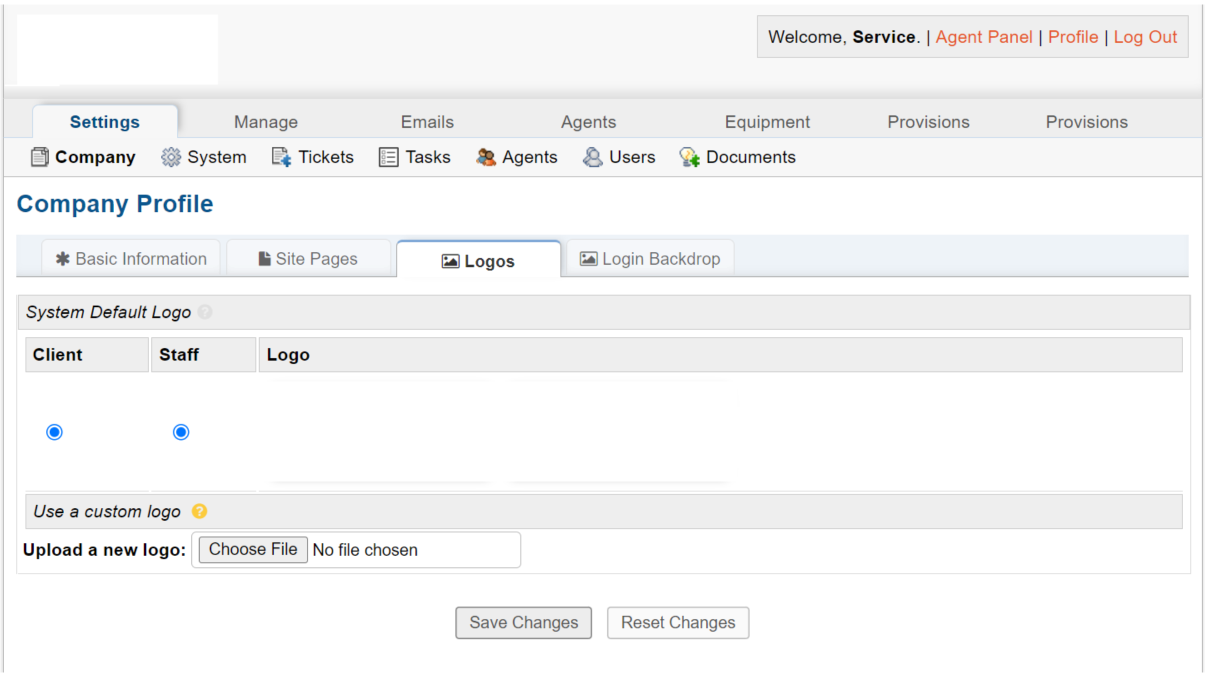
This is where you choose the layout your User will see for common pages.

Landing Page: Displayed on the front page of your website.

Offline Page: Displayed when your helpdesk is offline.

Default Thank-You Page: Displayed to the User when they submit a new ticket.

Logos

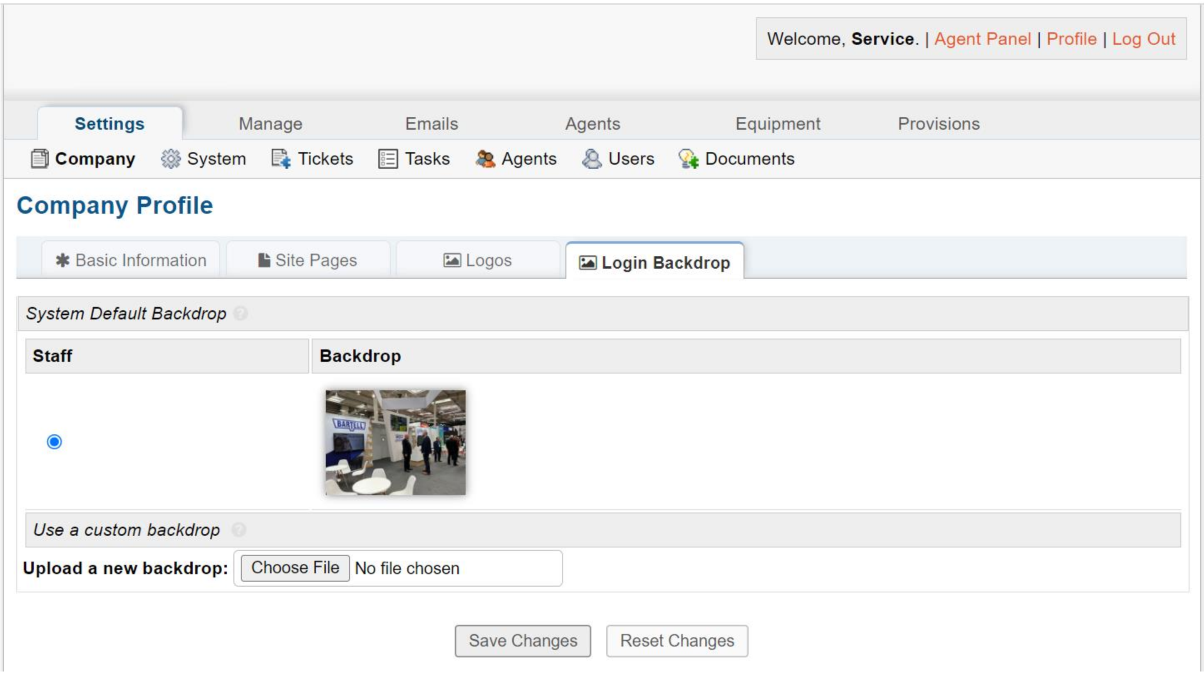


The help desk can be branded with a company logo by uploading a company logo at Admin Panel > Settings > Company.

The logo may be an image in a .gif, .jpg, or .png format. To speed up load times, it is recommended that the image be sized close to the default image size (817px x 170px). Once the logo has been selected, click on "Save Changes" at the bottom of the page to start the upload process.

After the logo is uploaded, be sure to select it to be visible on the Landing, Thank You, and Offline pages. Numerous logos can be uploaded and added to email templates; however, only one logo can be visible at a time on all Site Pages. To edit the text for these pages, simply go to Admin Panel > Manage > Site Pages and select the page to be edited.

5.1.4. Login-Backdrop



Upload an image to customize the Backdrop that will be displayed on the staff login page. Choose an image in the .gif, .jpg, or .png formats. We will proportionally resize the display of your image. We will not, however, resize the image's data. Therefore, to speed load times, it is recommended that you keep your image relatively small (under a megabyte). Note also that the PHP max upload settings apply.

System Settings

Admin Panel > Settings > System

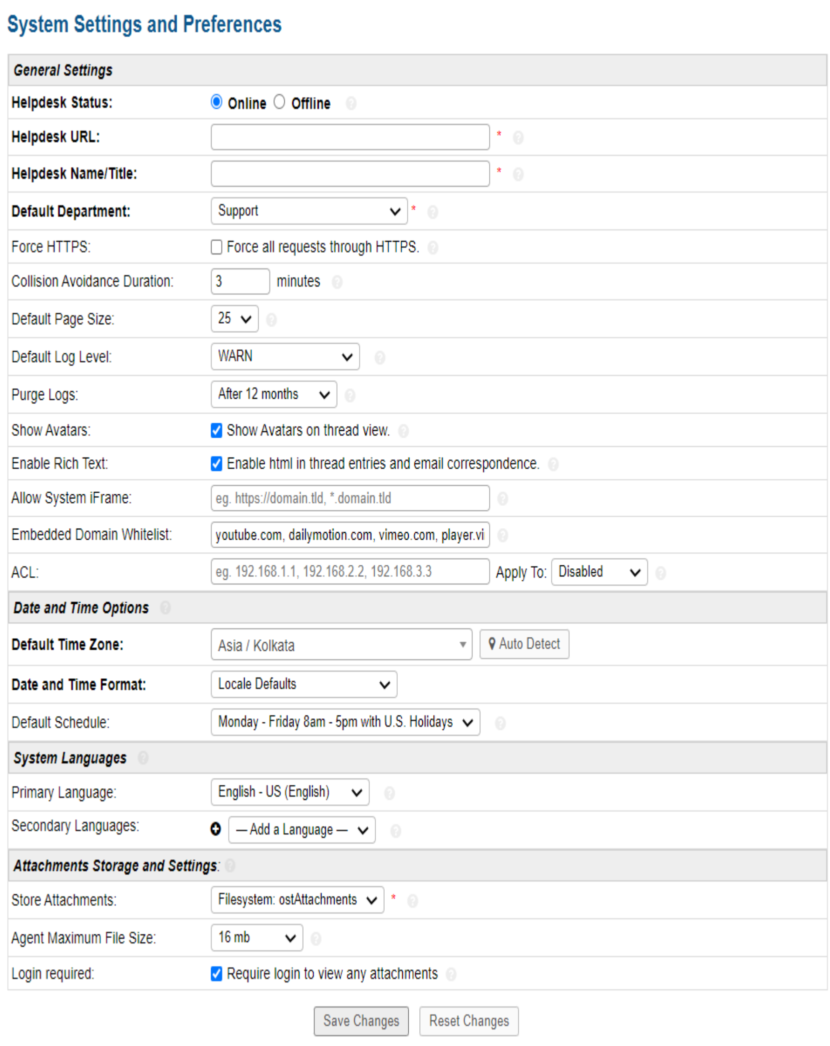
General Settings

Helpdesk Status: If the status is changed to Offline, the client interface will be disabled. This does not, however, affect any normal Agent interaction with the Agent Panel.

Helpdesk URL: This URL is the base of your iSERV installation. It is used in email communication to direct Users back to your helpdesk.

Helpdesk Name/Title: This is the title/ company name that appears in the Password Reset email. The email template is available from Settings > Users > Templates.

Default Department: Choose a default Department for tickets that are not otherwise routed to a specific department. Tickets can be routed-based on equipment, incoming emails, and ticket filter settings.



Force HTTPS: This setting allows Admins to configure whether or not they want to Force HTTPS system-wide. If enabled, any request that is using the HTTP protocol will be redirected to the HTTPS protocol. Note, this will only work if you have an SSL certificate installed and have HTTPS configured on the server.

Collision Avoidance Duration: Enter the maximum length of time an Agent is allowed to hold a lock on a ticket or task without any activity. Enter 0 to disable the lockout feature.

Default Page Size: Choose the number of items shown per page in the Ticket Queues of the Agent Panel. Each Agent can also customize this number for their own account under My Preferences.

Default Log Level: Determine the minimum level of issues which will be recorded in the System Log. Debug represents the least severity, and Error represents the greatest severity. For example, if you want to see all issues in the System Logs, choose Debug.

Purge Logs: Determine how long you would like to keep System Logs before they are deleted. System logs are located at Admin Panel > Dashboard and include Error Messages, Warnings, or Debug events of the help desk.

Show Avatars: Enable this to show Avatars on thread correspondence. The Avatar Source can be set in Agents' and Users' settings pages.

Enable HTML/Rich Text: If enabled, this will permit the use of rich text formatting between Clients and Agents.

Allow iFrames: This is a setting to allow specified domains to use your helpdesk in an iFrame. By default, no one is allowed to use your helpdesk in an iFrame for security purposes. If, however you'd like to use your helpdesk in an iFrame on your company website/forum/etc. you can enter the site domain in the Allow iFrames textbox and the site will be able to use your helpdesk in an iFrame. This option accepts domain wildcards, HTTP/HTTPS URL scheme, and port numbers. Example: https://domain.tld, sub.domain.tld:443, http://*.domain.tld

Embedded Domain Whitelist: Enter a comma separated list of domains to be whitelisted for iFrames used in the system. Do not input http(s) or www with the domain; only the domain name will be accepted. This is used when you would like to embed content in the system (eg. YouTube video) via Client Portal, Documents, etc. If you add an iFrame with a non-whitelisted domain, the system will remove the iFrame automatically. By default, the system allows YouTube, Vimeo, DailyMotion, and Microsoft Stream. Example: domain.tld, sub.domain.tld

ACL: ACL (or Access Control List) is a feature allowing you to limit access to your entire helpdesk (or specific panels) to a list of IP addresses. The Access Control List (ACL) feature basically allows you to enter a single IP address or a comma separated list of IP addresses to allow access to the system. Essentially, this means whatever IP address is in the ACL field will have access to the specified Panels of the software. If the field is left blank your helpdesk is open to the world. This feature is useful for those who wish to lock down their helpdesk to certain clients, to just their internal network or just to list of IP addresses.

ACL List is pretty straightforward as it's just a simple Textbox field in which you can insert a single IP address or a comma separated list of multiple IP addresses. For now, it only accepts the full IP address format of xxx.xxx.xxx.xxx. If you insert multiple IP addresses you have to use the Comma Separated List format of xxx.xxx.xxx.xxx, yyy.yyy.yyy.yyy

Note: IPs cannot have a trailing comma (e.g. 192.168.1.1,) otherwise a validation error will be thrown.

Apply To

After the ACL List is populated you can then choose an "Apply To" option. The option states which panel(s) the ACL will be applied to. There are four options in the Apply To dropdown that you can choose from. The first option is called "Disabled" which means the ACL feature will be Disabled. The second option is called "All" which means the ACL will be applied to all Panels (i.e. Client Portal, Staff Panel and Admin Panel) in the helpdesk. The third option is called "Client Portal" which means the ACL will only be applied to the Client Portal. The last option is called "Staff Panel" which means the ACL will only be applied to the Staff/Admin Panel.

Date & Time Settings

Date & Time Options Section:

The following settings define the default settings for Date and Time settings for the help desk. You can choose to use the locale defaults for the selected locale or use customize the formats to meet your unique requirements. Refer to the ICU format strings as a reference for customization. The dates shown below simply illustrate the result of their corresponding values.

- **Default Time Zone:** Can be auto detected or selected from available options in the drop down.
- **Date & Time Format:** Can choose from Locale Default, Locale Defaults with 24-hour time or Advanced for specific time/date formatting options of the the ICU Date Formatting Table
- **Default Schedule:** Choose the default Schedule to be used by SLA when rendering tickets Overdue.

ADVANCED:

- **Time Format:** Format of the time as seen throughout the help desk.
- **Date Format:** Date format preference for the Help Desk.
- **Date and Time Format:** Format of the Date and Time of the Help Desk.
- **Day, Date, and Time Format:** Where applicable, format of the Day, Date, and Time stamp of the Help Desk.
- **Default Schedule:** Choose the default Schedule to be used by SLA when rendering tickets Overdue.

System Languages: Choose a system primary language and optionally secondary languages to make your interface feel localized for your agents and Users.

- **Primary Language:** Content of this language is displayed to agents and Users if their respective language preference is not currently available. This includes the content of the interface as well as custom content, such as thank-you pages and email messages. This is the language in which the untranslated versions of your content should be written.
- **Secondary Language:** Select language preference options for your agents and Users. The interface will be available in these languages, and custom content, such as thank-you pages will be translatable to these languages.

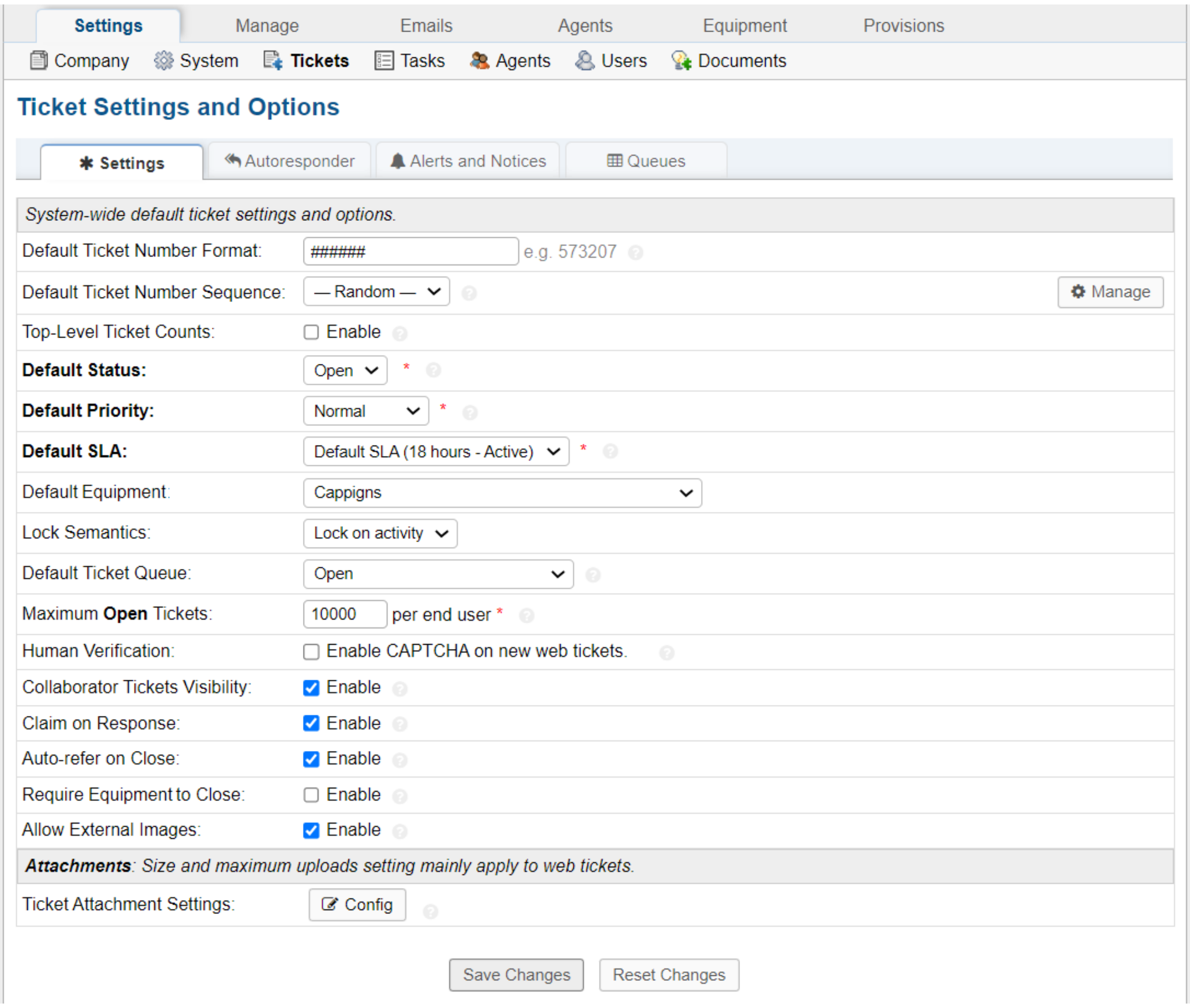
Attachment Settings and Storage: Configure how attachments are stored.

- **Store Attachments:** Choose how attachments are stored; in the database or in additional storage backend which can be added by installing storage plugins.
- **Agent Maximum File Size:** Choose a maximum file size for attachments uploaded by agents. This includes canned attachments, documents, and attachments to ticket and task replies. The upper limit is controlled by PHP’s upload max file size setting.
- **Login Required:** Enable this setting to forbid serving attachments to unauthenticated users. That is, users must sign into the system (both end users and agents), in order to view attachments. From a security perspective, be aware that the user’s browser may retain previously-viewed files in its cache. Furthermore, all file links on your helpdesk automatically expire after about 24 hours.

Ticket Settings

Admin Panel > Settings > Tickets

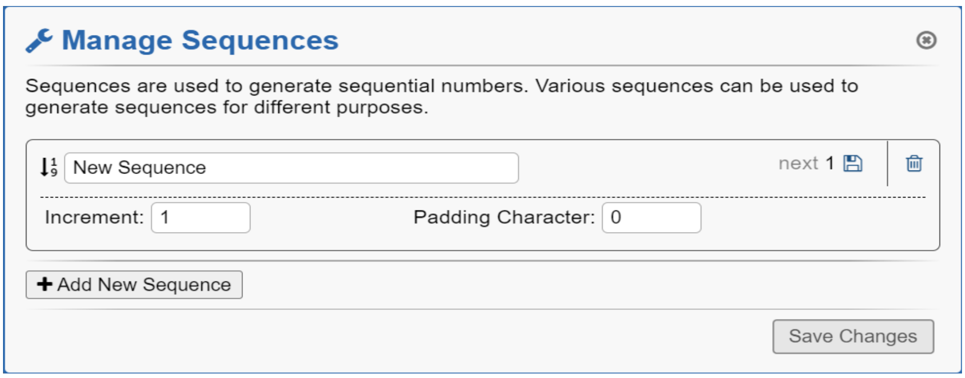
Settings



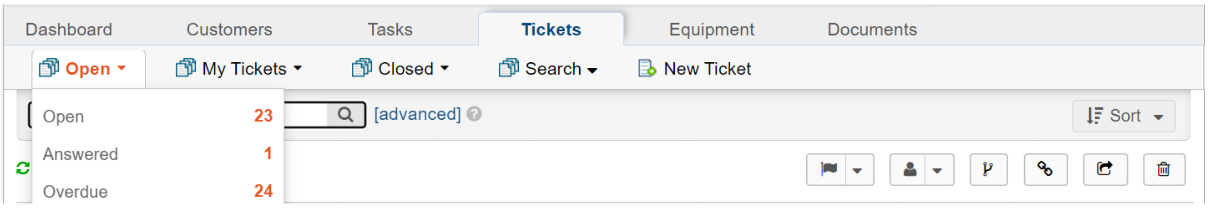
In this section, you can create standards and rules for each ticket that is created. Review each setting in this tab and determine the best settings for your organization. You can also enable attachments on this tab. All default settings can be overridden at various locations in the help desk.

Default Ticket Number Format: This setting is used to generate ticket numbers. Use hash signs (#) where digits are to be placed. Any other text in the number format will be preserved. For example, for six-digit numbers, use ######.

Default Ticket Number Sequence: Choose between Random or Sequential numbers for tickets. To create new sequences, click on the Manage button to the far right of the field.



Top-Level Ticket Counts: If enabled, this will show the Ticket Counts for Top-Level Queues in the Agent Panel. By default, Top-Level Queues do not show their counts. For now, counts will not appear until you hover over one of the Queue names.



Default Status: Choose a status as the default for new tickets. This can be defined for each equipment, if desired. It can also be overridden by a ticket filter.

Default Priority: Choose between Low, Normal, High, and Emergency for all tickets not auto-assigned to priority based on the Equipment, Email Address, or Department configurations if set different than System Default.

Default SLA: Default Service Level Agreement to close ticket (in hours). To create SLA levels, go to Admin Panel > Manage > SLA Plans.

Default Equipment: Select an equipment that will be automatically selected when an Agent or end-user opens a new ticket on the help desk or if a ticket is emailed in to the Help Desk.

Lock Semantics: Determine what actions taken by Agents on tickets will create a lock on the tickets. Options include: Disable, Lock on View, and Lock on Activity.

Default Ticket Queue: Setting to determine the default queue for agents upon log-in. Agents can also set their default queue in their Profile tab to override this setting.

Maximum Open Tickets: Maximum number of open tickets allowed per email/user; helps with spam and email flood control - You can enter 0 for unlimited.

Human Verification: Enable CAPTCHA on the Client Portal to verify an incoming ticket is the result of human activity. Requires GDLib library.

Collaborator Tickets Visibility: If Enabled, Users will have visibility to ALL Tickets they participate in when signing into the Web Portal. If Disabled, Users will only be able to see their own Tickets when signing into the Web Portal.

Claim on Response: Enable this to auto-assign unassigned tickets to the responding Agent. Reopened tickets are always assigned to the last respondent.

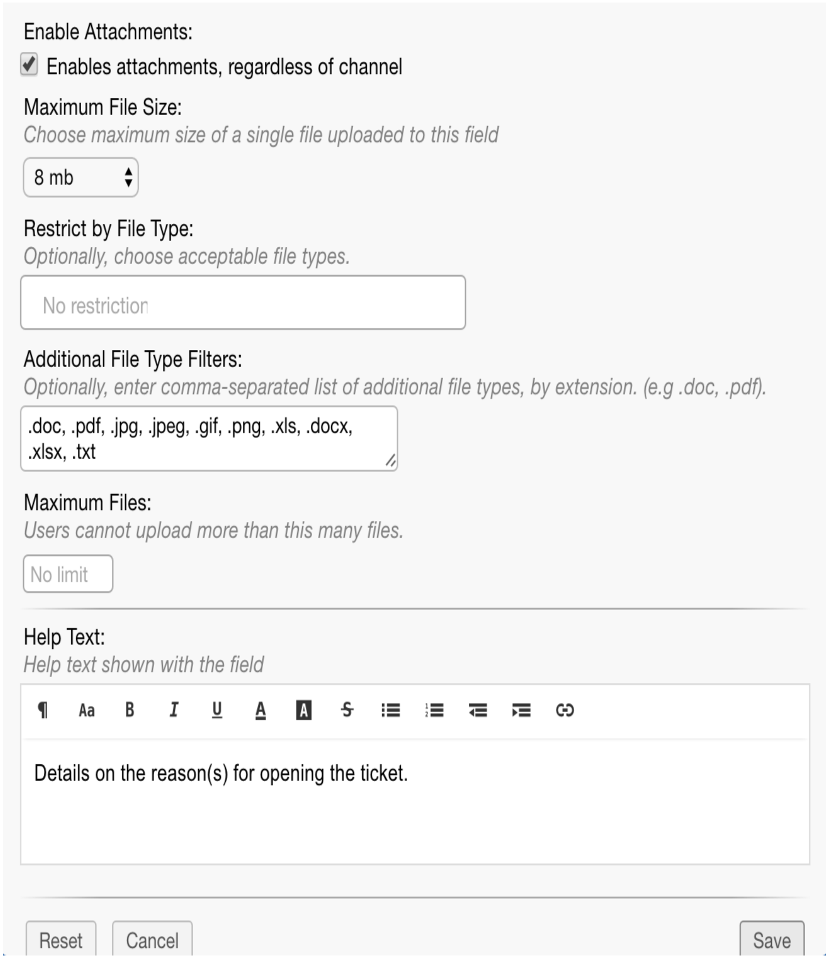
Auto-refer on Close: Enable this to auto-refer tickets to the assigned or closing Agent when a ticket is closed. This is necessary when you want to give agents with limited access continued access to assigned tickets after they're closed.

Require Equipment: If Enabled, a Ticket must have an equipment selected in order to be Closed by an Agent. This setting is useful if tickets are being created via email and you would like email tickets to have an equipment assigned to them.

Attachments: The configurations for this field is specific to the User attachment settings when opening a ticket on the help desk. Attachments are included by default to the Issue Details field of the built-in Ticket Details Form.

With the User Attachment Settings, click the grey “Config” button to configure the settings for the attachment field included in the Ticket Details Built-in Form. This field is available for each ticket opened on the client portal and also allows attachment from any channel a ticket comes into in the help desk. If disabled, this will not allow attachments included in an email sent to the help desk to be included in the ticket. (**Attachments can still be submitted to the ticket if an Attachment field is added to the Ticket Details form or any custom form with attachments disabled globally.**)

Included in the configurations box for Field Setup:



Enabling of Attachments: This is a global setting pertaining to new tickets created on the client portal or emailed into the help desk. If disabled, tickets will be created, but no attachments will be included if sent via email. If the ticket is created on the client portal and attachments are disabled, there will be no attachment field within the Ticket Details unless a custom field is added to the ticket (on the Ticket Details built in form) to accept attachments.

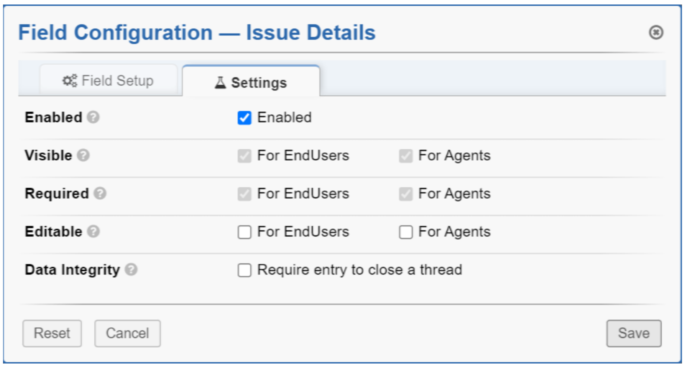
Maximum File Size: This is the size per attachment that is acceptable when tickets are created or responses are posted. If an attachment exceeds this limit, an internal note will be posted letting the agent know an attachment was not accepted.

Attachment File Limitations: Allows the configuration of specific types of attachments if necessary.

Maximum Attachments Allowed by the end-user: If necessary, the number of files can be limited per upload of attachments.

Help Text: Text that will appear under the field to help users and agents creating tickets get a better understanding of the information being gathered.

Configurations box for Issue Details:



Enabled: This field can be disabled which will remove it from the form for new entries, but will preserve the data on all current entries.

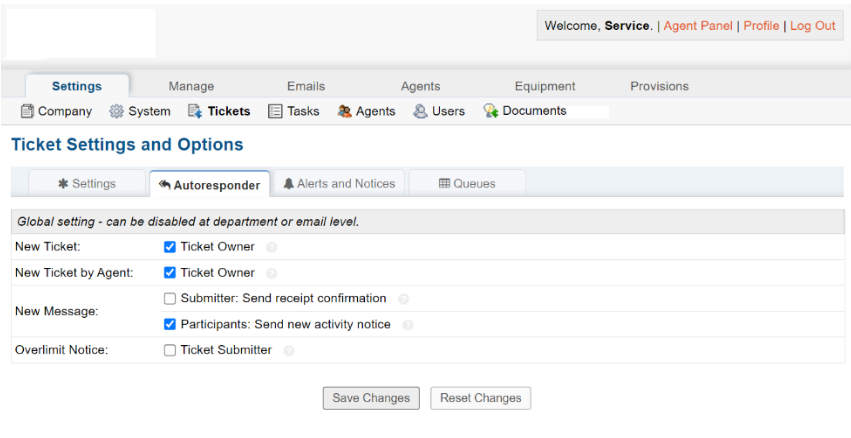
Visible: Making fields *visible* allows agents and end users to view and create information in this field.

Required: New entries cannot be created unless all *required* fields have valid data.

Editable: Fields marked editable allow agents and end users to update the content of this field after the form entry has been created.

Data Integrity: Optionally, this field can prevent closing a thread until it has valid data.

Autoresponder



Global setting for the Auto Responses which are sent to end users; can be disabled by departments, Equipment, Ticket Filter, or email address. These message templates can be reviewed and edited in the Admin Panel > Emails > Templates and include:

New Ticket: Enable this to send an autoresponse to the User on new ticket creation.

New Ticket by Agent: Notice sent when an Agent creates a ticket on behalf of the User. Agent can override this when creating new tickets.

New Message:

Submitter: Confirmation notice sent when a new message is appended to an existing ticket.

Participant: Broadcast messages received from message submitter to all other participants on the ticket.

Overlimit Notice: Ticket denied notice sent to User on Maximum Open Tickets violation.

Alerts and Notices

There are messages which can be enabled to alert agents of the events in a Ticket's lifecycle. These messages templates can be edited in the Admin Panel > Emails > Templates and include:

New Ticket Alert: Alert sent out to Agents when a new ticket is created.

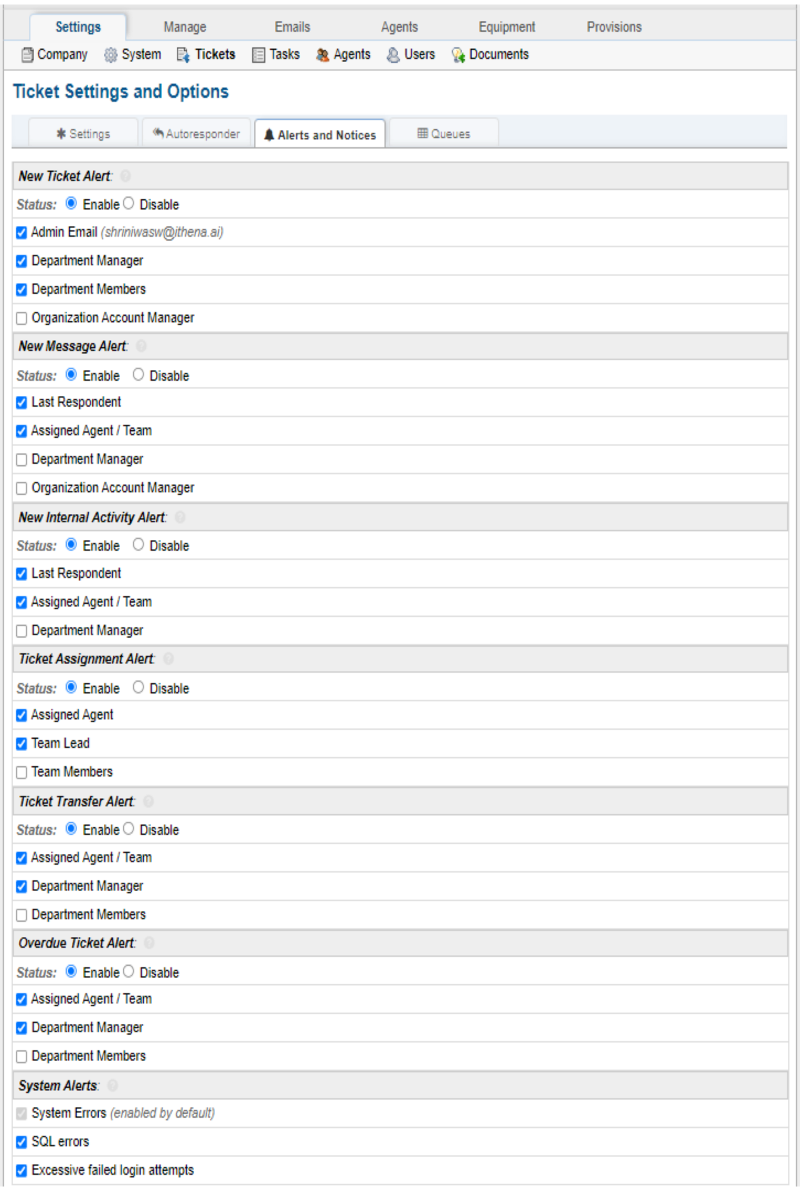
New Message Alert: Alert sent out to Agents when a new message from the User is appended to an existing ticket.

New Internal Activity Alert: Alert sent out to Agents when internal activity such as an internal note or an agent reply is appended to a ticket.

Ticket Assignment Alert: Alert sent out to Agents on ticket assignment.

Ticket Transfer Alert: Alert sent out to Agents on ticket transfer between Departments.

Overdue Ticket Alert: Alert sent out to Agents when a ticket becomes overdue based on SLA or Due Date.



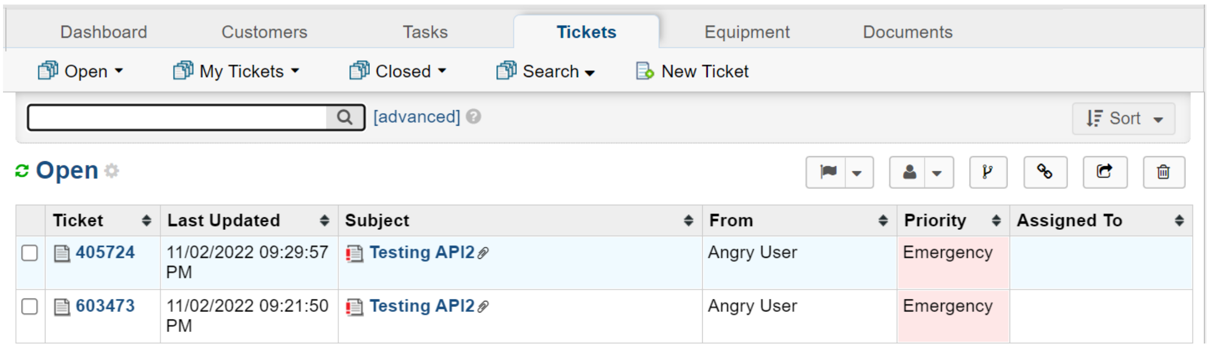
System Alerts: Significant system events that are sent out to the Administrator. Depending on the configured Log Level, the events are also made available in the System Logs.

Queues

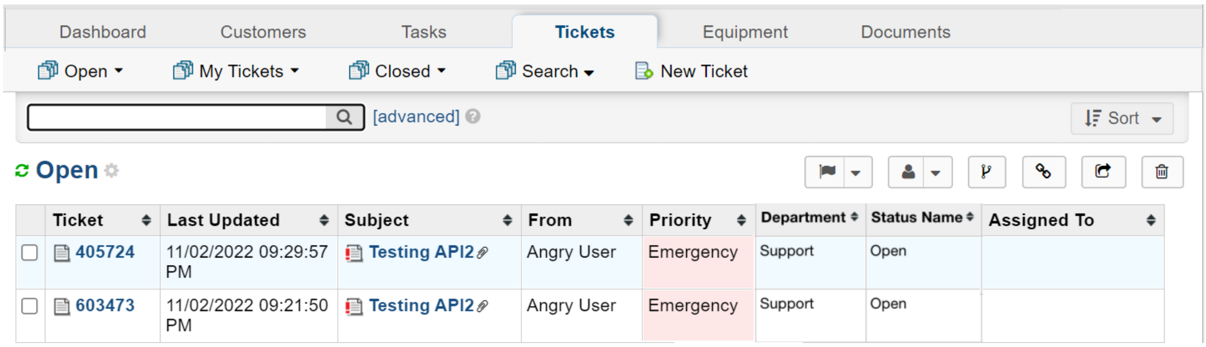
A Custom Queue is a view of tickets based on a custom criterion that you specify. It allows you to create your own personal views of tickets and specify what information you would like to see.

A Custom Column is an additional field that is not displayed initially when viewing the ticket tab. Using custom columns allows you to include these fields in the ticket list.

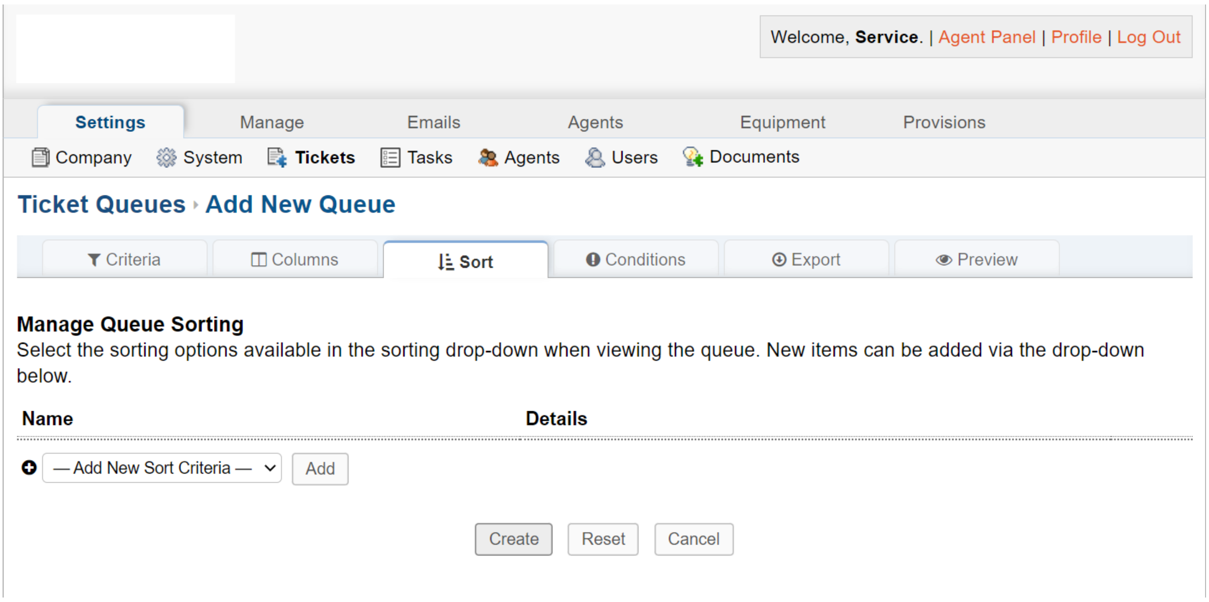
Before adding custom columns:



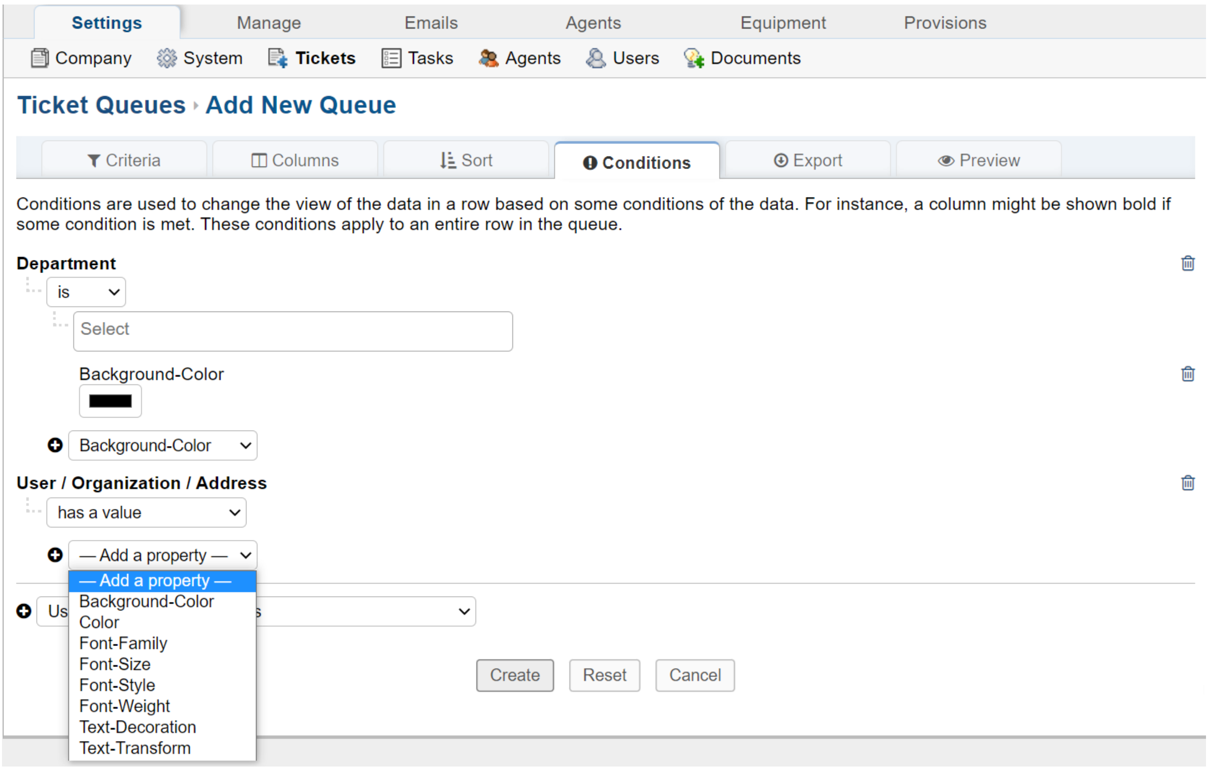
After adding custom columns:



Create **Custom Sort** options from the 'Sort' Tab



Conditional Styling can be applied to your queues to change the look of the queue based on the ticket's criteria.

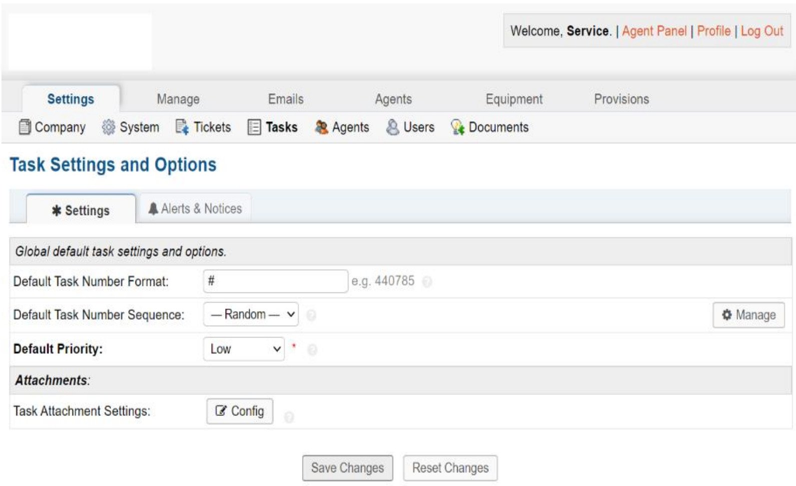


Task Settings

Admin Panel > Settings > Tasks

Settings

Default Task Number Format: This setting is used to generate task numbers. Use hash signs (#) where digits are to be placed. Any other text in the number format will be preserved. For example, for six-digit numbers, use ######.

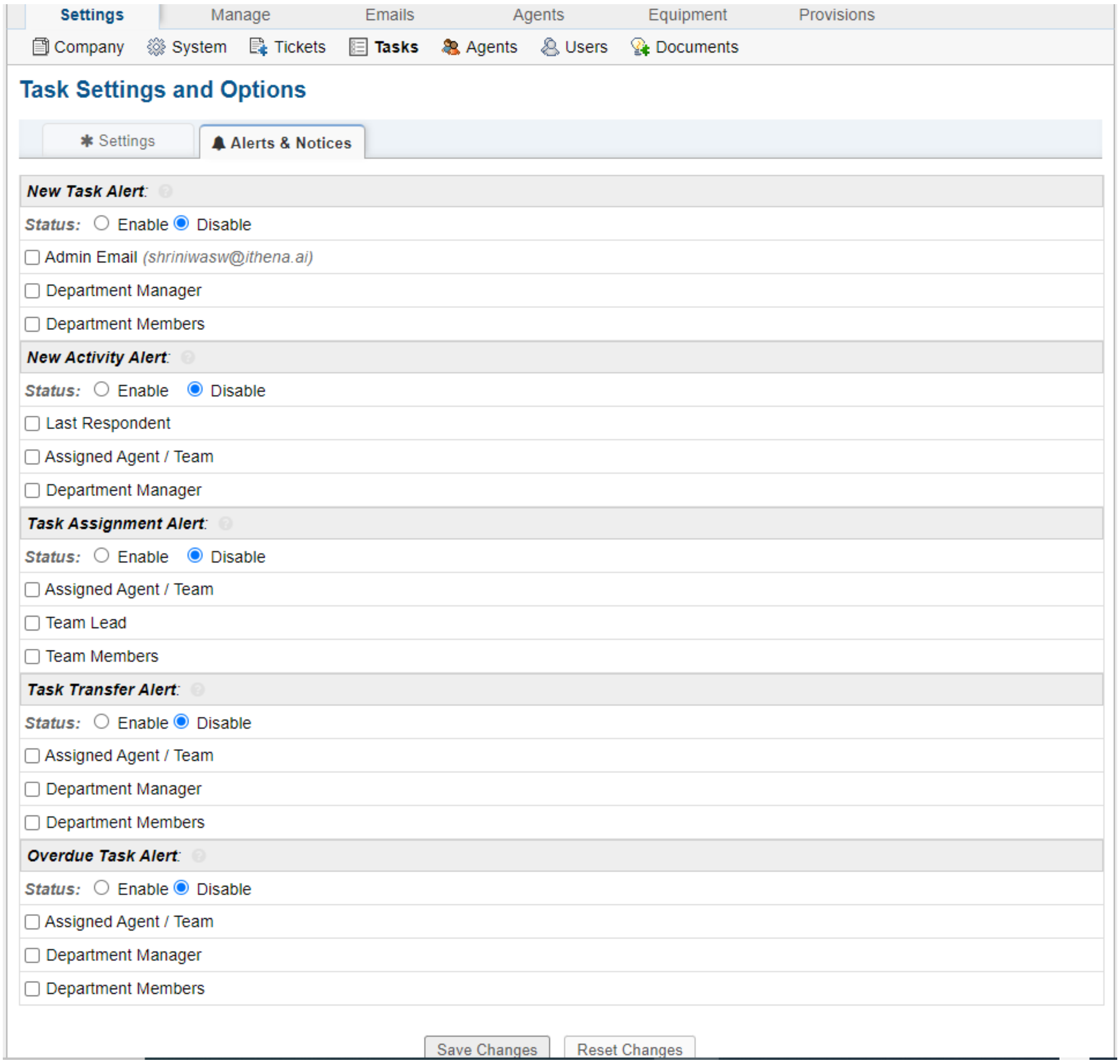


Default Task Number Sequence: Choose a sequence from which to derive new task numbers. The system has an incrementing sequence and a random sequence by default. To create a new sequence, click on the Manage tab to the far right of the field.

Default Priority: Choose a default Priority for tasks not assigned a priority automatically.

Attachments: Configure settings for files attached to the Description field. These settings are used for all new tasks and new messages regardless of the source channel (web portal, email, api, etc.).

Alerts & Notices



There are messages which can be enabled to alert agents of the events in a Task's lifecycle. These messages templates can be edited in the Admin Panel > Emails > Templates and include:

New Task Alert: Alert sent out to Agents when a new task is created.

New Activity Alert: Alert sent out to Agents when a new message is appended to an existing task.

Task Assignment Alert: Alert sent out to Agents on task assignment.

Task Transfer Alert: Alert sent out to Agents on task transfer between Departments.

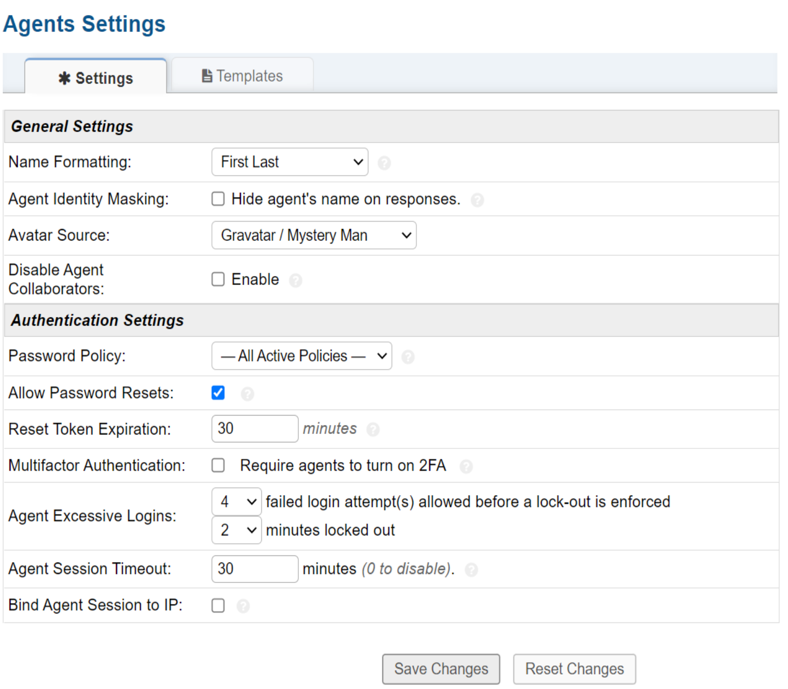
Overdue Task Alert: Alert sent out to Agents when a task becomes overdue based on SLA or Due Date.

Agents Settings

Admin Panel > Settings > Agents

Settings

Set system configurations for the Agents of the help desk including the Password Expiration Policy, the max number of failed login attempts before prompting the “forget password” link, or if they need to be locked out. Agents can also be bound to their IP address for log-in.



Name Formatting: Format for Agents names throughout the system.

Agent Identity Masking: If enabled, this will hide the Agent’s name from the Client during any communication.

Avatar Source: Choice of where you want your Avatars to come from.

Configurable Agents as Collaborators: In some use cases Agents do not want to be added as Collaborators on tickets to avoid an overload of emails/alerts, etc. Thus, checkbox labelled *Disable Agent Collaborators* if Enabled/Checked will automatically Disable Agents that are added as Collaborators.

Password Expiration Policy: Choose how often Agents will be required to change their password. If disabled, passwords will not expire.

Allow Password Resets: If enabled, displays the Forgot My Password link on the Staff Log-In Page after a failed log in attempt.

Reset Token Expiration: Choose the duration (in minutes) for which the Password Reset Tokens will be valid. When an Agent requests a Password Reset, they are emailed a token that will permit the reset to take place.

Multifactor Authentication: Enable this feature if you would like to have an extra layer of authentication set up for Agents when they log into the helpdesk. Once they correctly submit their username and password, they will be required to submit a token to finish logging into the helpdesk.

Agent Excessive Logins: Choose how many failed login attempt(s) allowed before a lock-out is enforced as well as how long the lock will be.

Agent Session Timeout: Choose the maximum idle time (in minutes) before an Agent is required to log in again. If you would like to disable **Agent Session Timeouts**, enter 0.

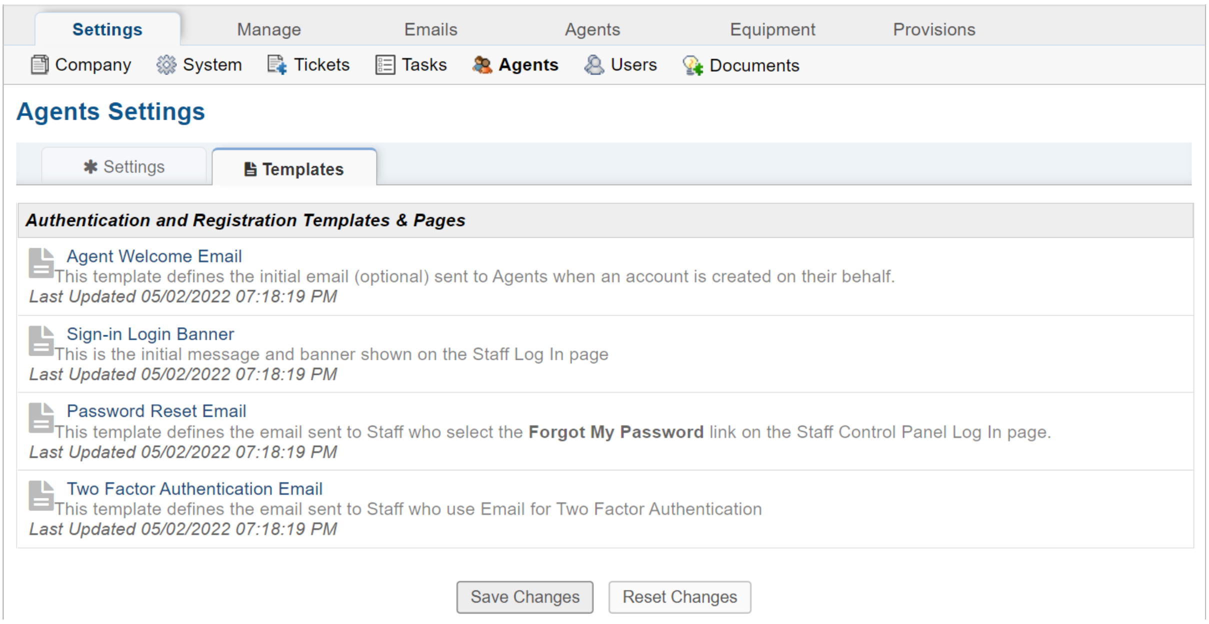
Bind Agent Session to IP: Enable this if you want Agent to be remembered by their current IP upon Log In. This setting is not recommended for users assigned IP addresses dynamically.

Templates

Agent Welcome Email: Initial (optional) email sent to staff members when accounts are created for them in the staff control panel.

Sign-in Login Banner: This is the initial message and banner shown on the staff login page.

Password Reset Email: Template of the email sent to staff members when using the Forgot My Password link.



User Settings

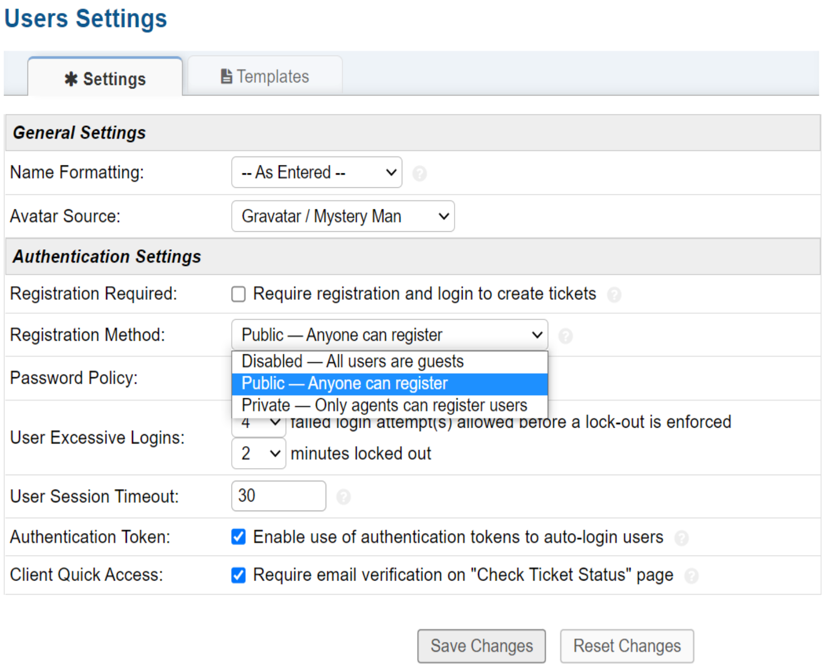
Admin Panel > Settings > Users

Settings

Registration can be required for Users to create tickets on the Help Desk to prevent random tickets or to limit Users' accessibility to the help desk.

If Registration is required, there are a few options of registration methods for end-users.

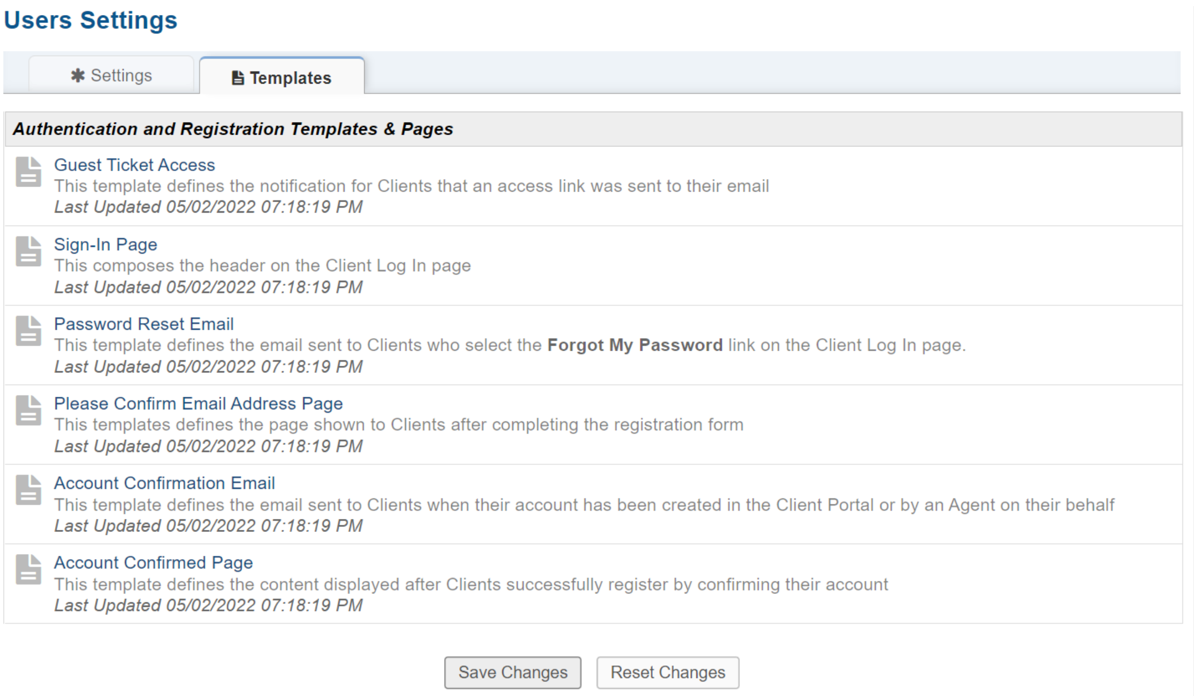
Registration is an important feature for Users to check ticket statuses or see all of their tickets in the help desk. A User can follow the link in the auto response to check the status of a ticket, or they can Login to the client portal to a ticket with the ticket number and their email address. This will then send a link to their email for them to follow back to that one, singular ticket. A User must be registered to Login to view all tickets associated with their name.



Users can easily check the status of a ticket with their email address and a ticket number if the Click Quick Access box is unchecked.

Templates

All Email Templates for Authentication and Access are editable and located in the Access sub-tab. Also located in this sub-tab is where the Sign-In Pages for both agents and Users can be edited. All templates contain an HTML/Rich Text toolbar when text is highlighted.



Guest Ticket Access: Ticket access link sent to clients for guest-only systems where the ticket number and email address will trigger an access link sent via email.

Sign-In Page: This forms the header on the staff login page.

Password Reset Email: Template of the email sent to clients when using the Forgot My Password link on the login page.

Please Confirm Email Address Page: Template of the page shown to the user after registering for an account.

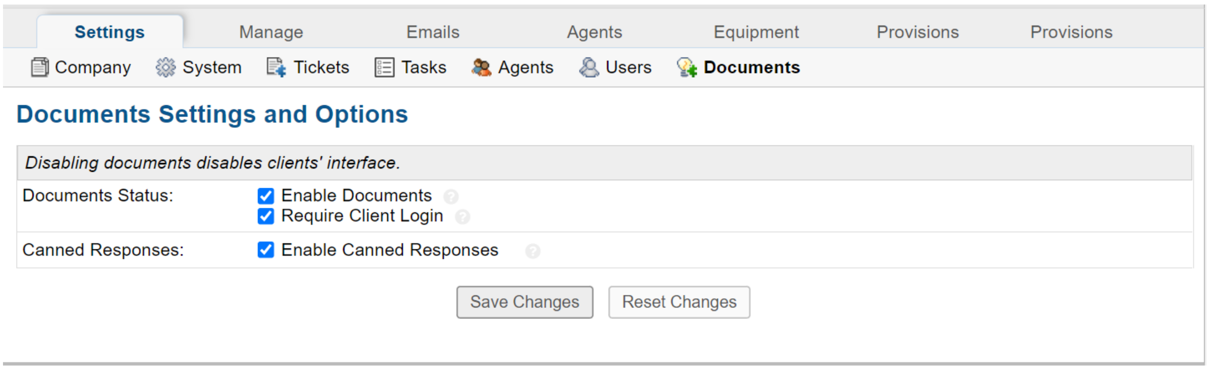
Account Confirmation Email: Confirmation email sent to clients when accounts are created for them by staff or via the client portal.

Account Confirmed Page: Page shown to the user after successfully registering and confirming their account.

Documents Settings

Admin Panel > Settings > Documents

Options & Settings



Documents Status:

- **Enable Documents:** Allows your Users self-service access to your public documents.
- **Require Client Login:** Requires all Users to log in before they can view documents.

Canned Responses: Enable this setting to allow Agents to use Canned Responses when replying to tickets.

MANAGE TAB

Ticket Filters

Admin Panel > Manage > Ticket Filters

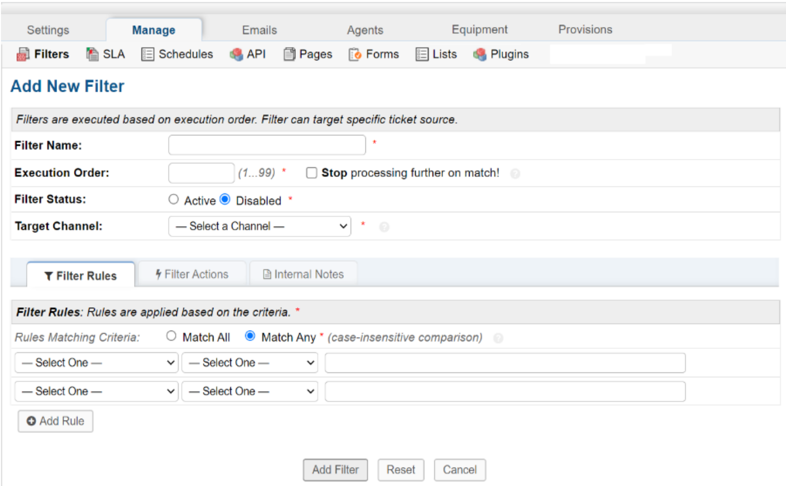
Create Ticket Filters

Ticket Filters are a set of "If ____, Then____" rules that create auto actions for new tickets based on the criteria set forth in the filter. The rules of the filter are applied only to tickets upon creation specific to how the ticket is created.

You can create Ticket Filters associated with information pulled from the email or ticket, such as a name, email address, customer, etc., and can create an auto-response (if desired) connected with a related Canned Response.

Admin Panel > Manage >Ticket Filters > Add New Filter:

Update/Add New Filter Section



Filter Name: Name given to filter for internal use only

Execution Order: This is a numeric listing of the order you want the tickets to be filtered. You can choose to stop filtering if the criteria for the filter is met- this is best utilized in determining rejected ticket filters.

Filter Status: Active or Disabled

Target: This is the source of creation of the ticket or the means by which the ticket was created. This will further specify which tickets the filter will be applied. There are 5 Targets to choose from only one can be chosen.

ANY: Applies filter to any tickets that originated from Web forms, API calls, and emails.

Web Forms: Applies filter to any tickets that originated from the Client Portal.

API Calls: If enabled, any tickets created through the API Feature will be processed for the filter if the filter criteria are met.

Emails: Tickets created from any/all emails sent to the system to create tickets.

Specific Email: A specific email address in the help desk utilized to create new tickets in the system.

Filter Rules Section

Up to 25 rules can be added in the Filter Rules section. If adding more than 4 rules to a filter, configure the actions for the entire filter after adding the first four rules and click "save changes" to view more rule boxes.

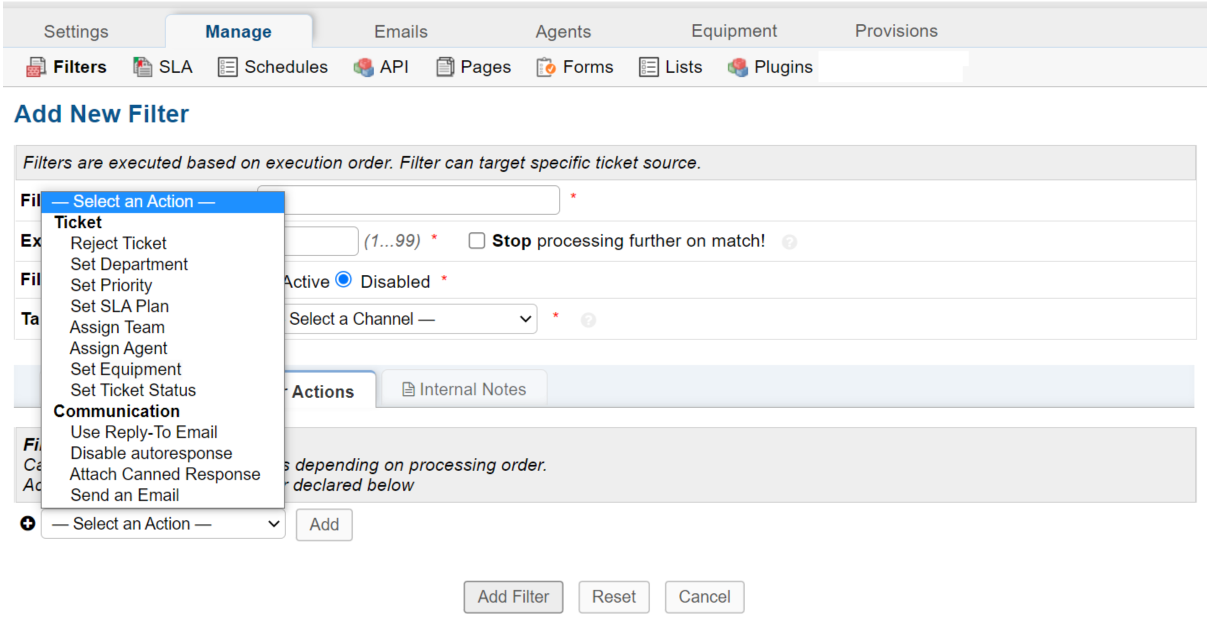
The rules criteria selection is from any field available in the ticket including custom forms, fields, lists and list properties.

Matching Methods:

Match Any versus Match All: If you would like the filter to match ANY of the rules, and then stop-choose Match Any. If you would like all rules of the filter to be matched- choose Match All.

Filter Action Section

Reject Ticket: If this is selected, no ticket will be created, therefore, save changes because all other actions below this action are invalid.



Use Reply-To Email: Reply to the specified Reply-To email address in the header of the ticket.

Ticket Auto-Response: Disable auto-responses to client if the filter rules are met.

Attach Canned Response: Send a canned response to the client if the filter rules are met.

Set Department: Auto-Assign to a specific Department if filter rules are met.

Set Status: This will determine the ticket status once created if the filter rules are met.

Set Priority: Assign priority to ticket when rules are met; this will override assigned department priority.

Set SLA Plans: Assign SLA plan when rules are met; this will override assigned department SLA.

Auto-Assign To: Auto-assign to specific Staff or Team when rules are matched.

Set Equipment: Ticket can be assigned a specific equipment, which, if applicable, will also add any custom form associated with that equipment.

Send an Email: Send an email to the client if the filter rules are met.

SLA Plans

Admin Panel > Manage > SLA (Service Level Agreements)

Create a New SLA Plan

SLA Plans or Service Level Agreements, are unlimited in iSERV. The purpose of the SLA Plan is to provide a length of time in which the help desk Administrator expects tickets to be closed.

SLA Plans can be created by going to the Admin Panel > Manage > SLA Plans. Click on the top right of the table to “Add New SLA Plan.”

One configuration to note with each SLA Plan is whether it can be overridden on Department transfer or change of equipment by being Transient. Transient SLAs are considered temporary and can be overridden by a non-transient SLA on Department transfer.

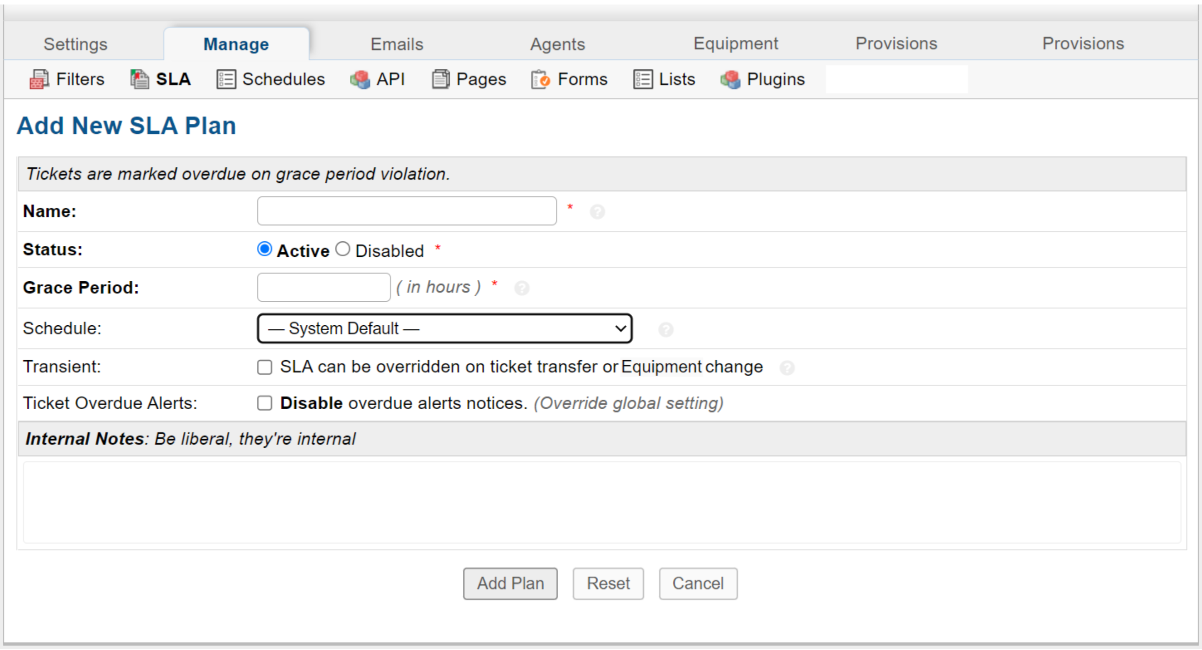
Once created, SLA Plans can be determined for Departments, Ticket Filters, and Equipment. There is also a System Default SLA Plan which can be chosen by going to Admin Panel > Settings > Tickets.

When a ticket is created internally from the Staff Panel, agents can choose an SLA Plan which will override any other assignments to a Department or Equipment. Agents can also select a Due Date for the ticket which, if passed, will cause the ticket to become overdue. No SLA plan can override a due date.

If a ticket is created from the Client Interface, the SLA Plan associated with the equipment will be in effect unless a Ticket Filter is in place and the criteria is met; then the SLA Plan associated with the Ticket Filter will be in effect.

For tickets created via email, the department that the email address is assigned to will determine the SLA plan of the ticket unless a Ticket Filter is in place and the criteria is met; then the SLA Plan associated with the Ticket Filter will be in effect.

Admin Panel > Manage > SLA Plans:



Service Level Agreements: SLA Plans can be set by equipment and department to ensure the ticket is CLOSED in the allotted or specified amount of time.

Name: Plan name to be selected when assigning.

Grace Period: Amount, in hours, before tickets with this SLA will become overdue if not closed in allotted time.

Status: Choose Active or Disable for the plan.

Transient: SLA can be overridden on ticket transfer or equipment change; if not transient, the SLA will remain the same as it is assigned on ticket creation.

Ticket Overdue Alerts: This will DISABLE overdue alert notices to staff for tickets assigned this SLA.

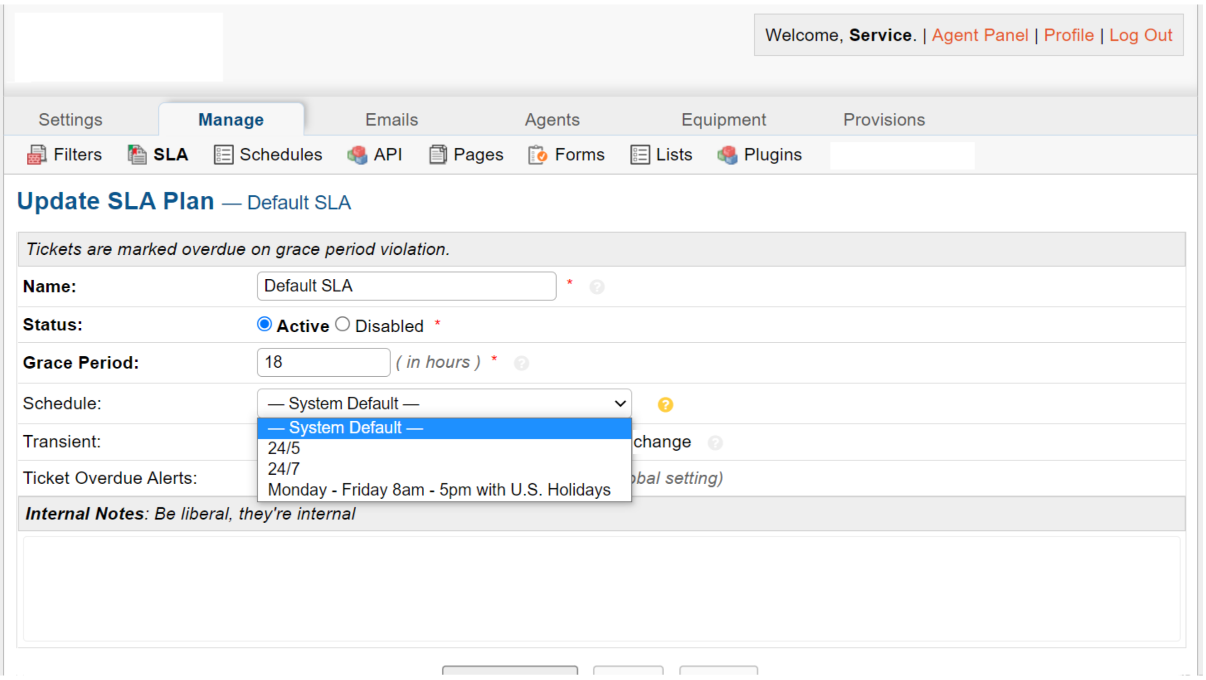
Schedules

Setting up a schedule lets you specify hours of operation for your help desk so that Tickets will only be marked overdue during those times.

Schedules tie into your helpdesk's SLA, or service level agreement, which is the amount of time given to respond to a ticket that comes into the helpdesk before it is marked overdue.

You can see the SLA's you have setup by going to Admin Panel > Manage > SLA as mentioned above just preceding **Schedules**.

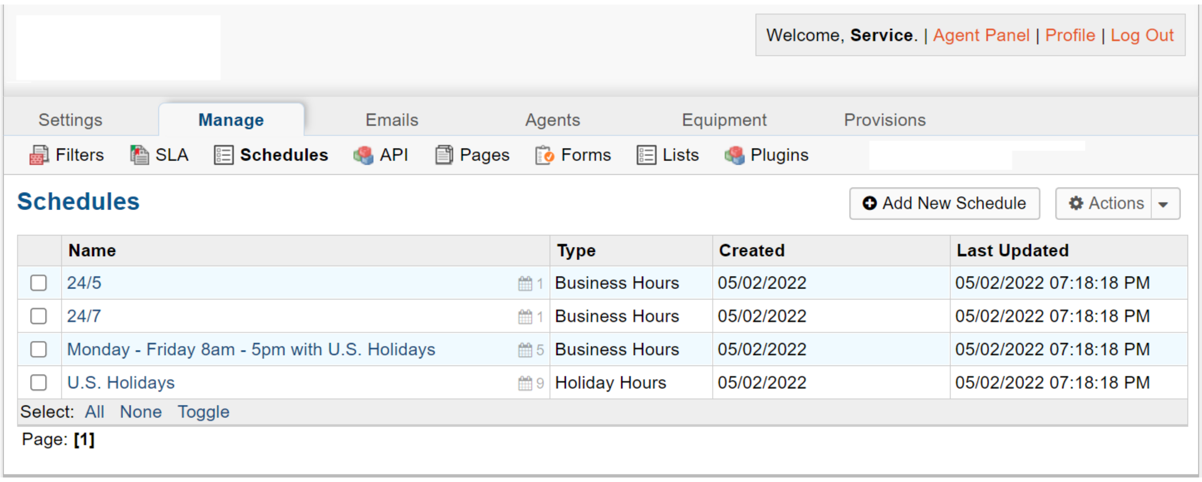
If you assign a Schedule to an SLA, Tickets will only be marked as overdue within the Business Hours specified in that Schedule.



Create a Schedule

Let's take a look at how to create a schedule.

You can create and configure schedules by going to Admin Panel > Manage > Schedules

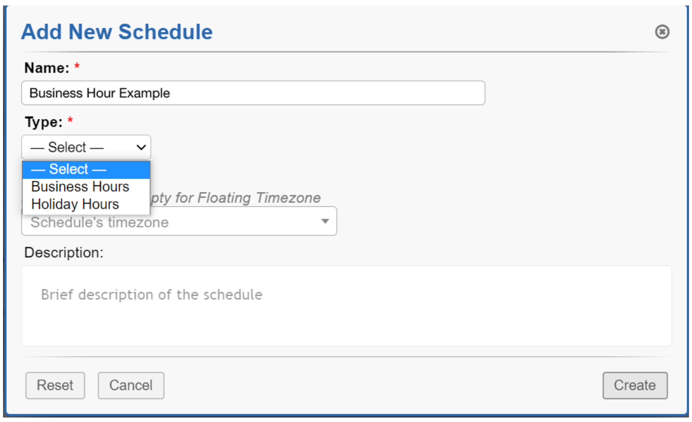


We have several schedules set up by default that can be used or reconfigured to meet your own needs.

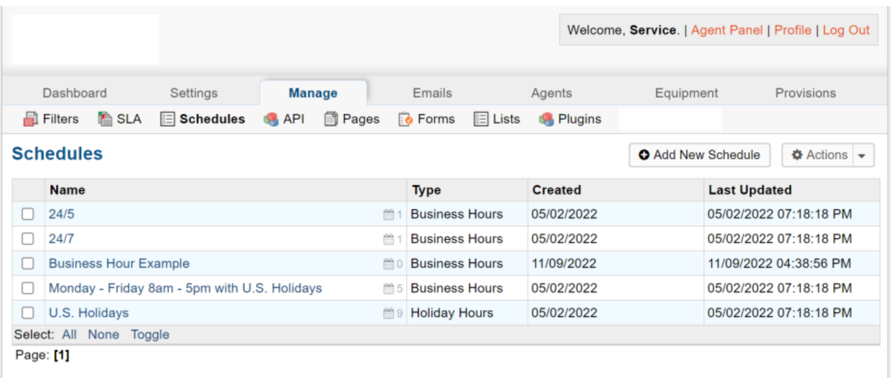
There are 2 types of Schedules:

- **Business Hours** which are the hours in which your helpdesk operates
- **Holiday Hours** which are special exceptions that should be applied to your normal hours of operation

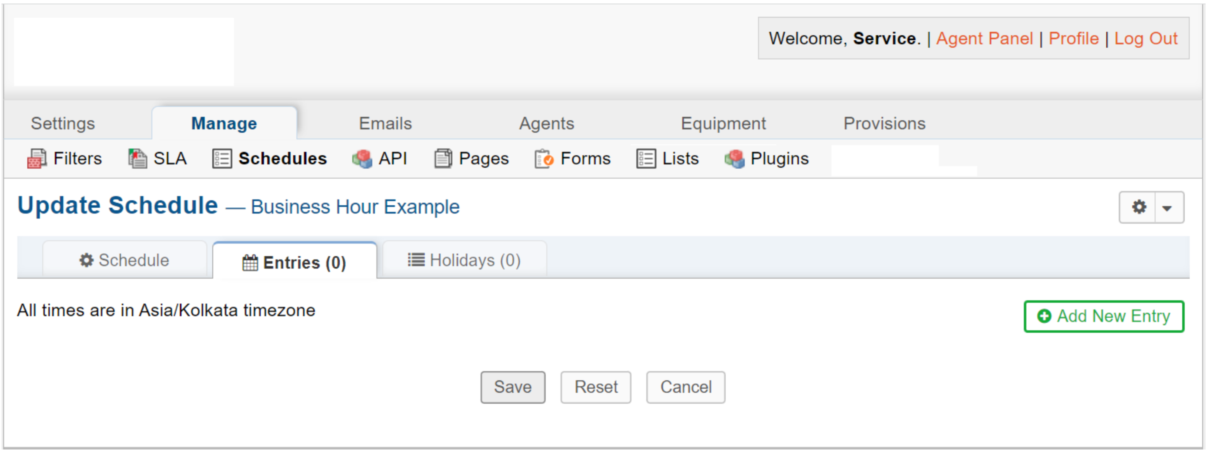
Business Hours

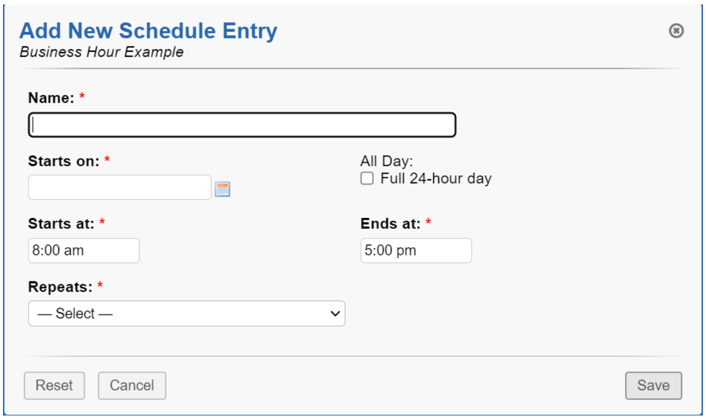


For the time zone, we recommend leaving it blank. This will apply the schedule to the default time zone set in the helpdesk. You can, however, force a specific time zone if you wish.

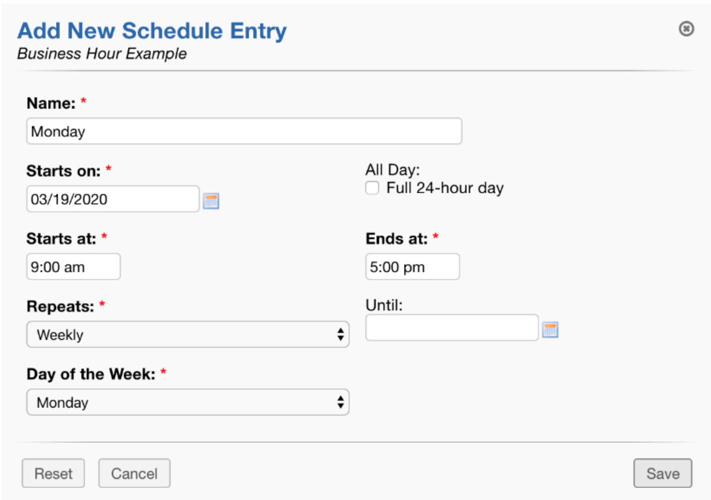


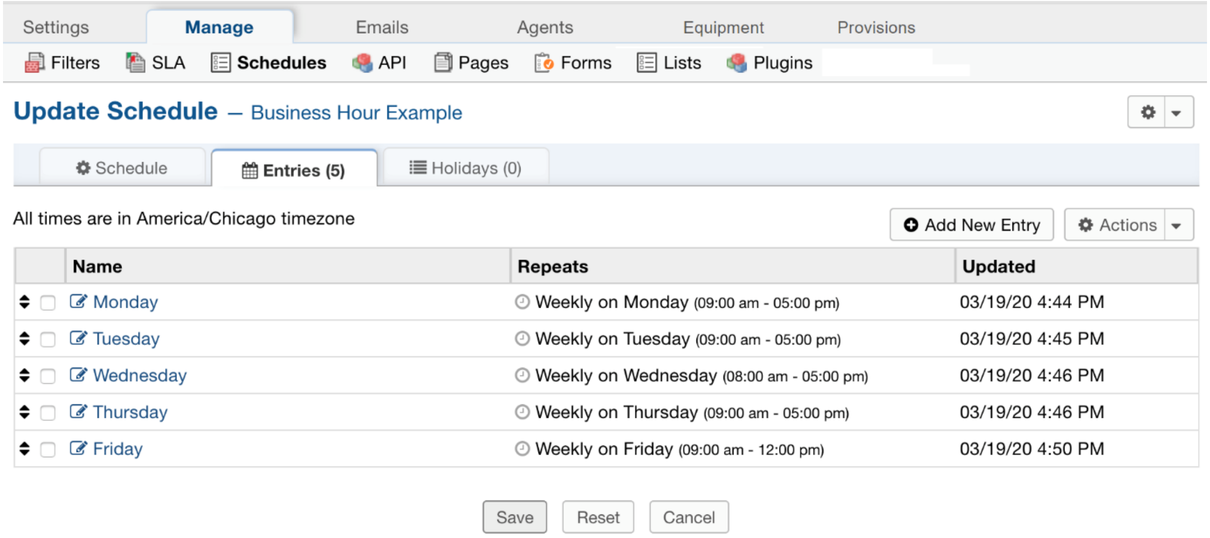
Once your schedule is created, you can add entries to it.





Let's say a company operates Monday - Friday from 9am to 5pm. To set this up, we can create an entry for weekdays, specifying those times.

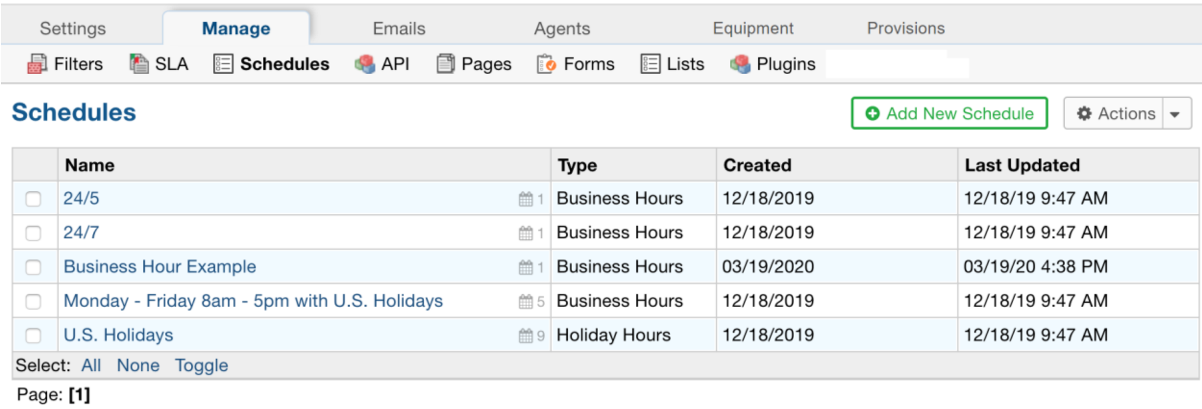


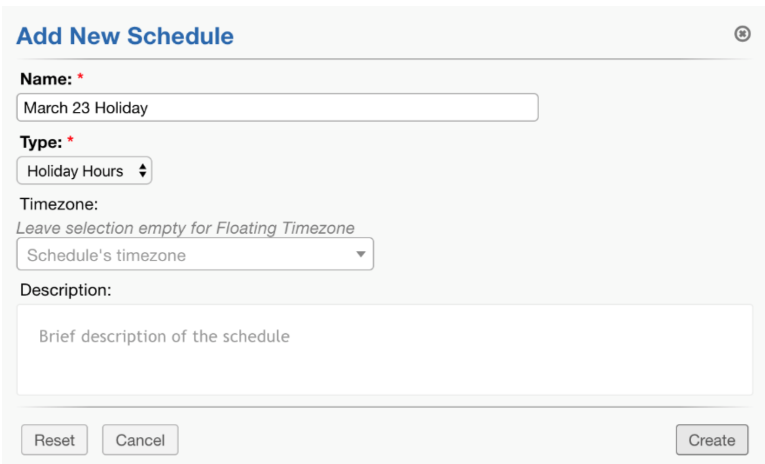


Holiday Hours

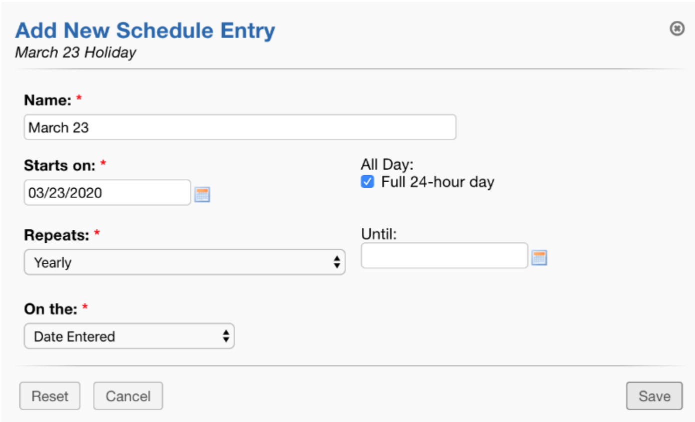
After you have specified the business hours a company works, you can specify which hours it is not in operation by setting up Holiday Hours.

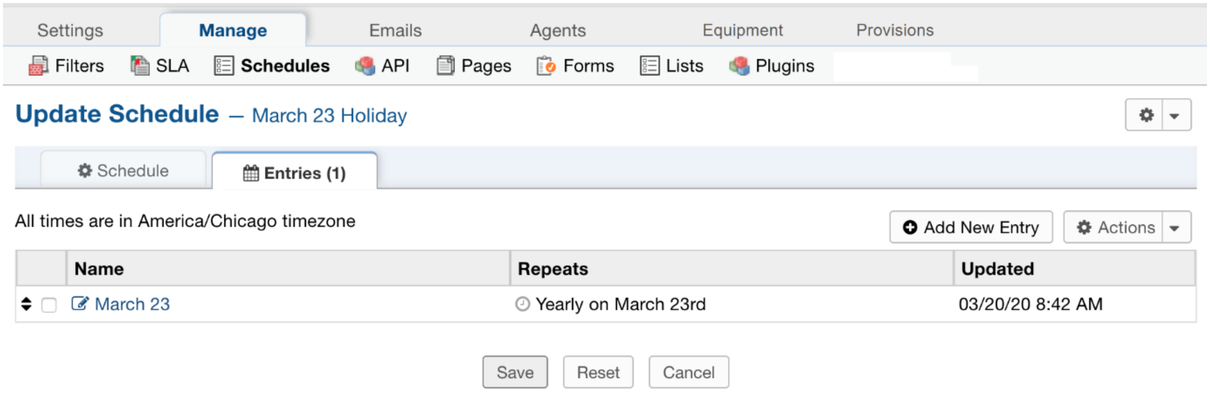
Let's say that on a certain date, there is a holiday for the company. First, create the Holiday.



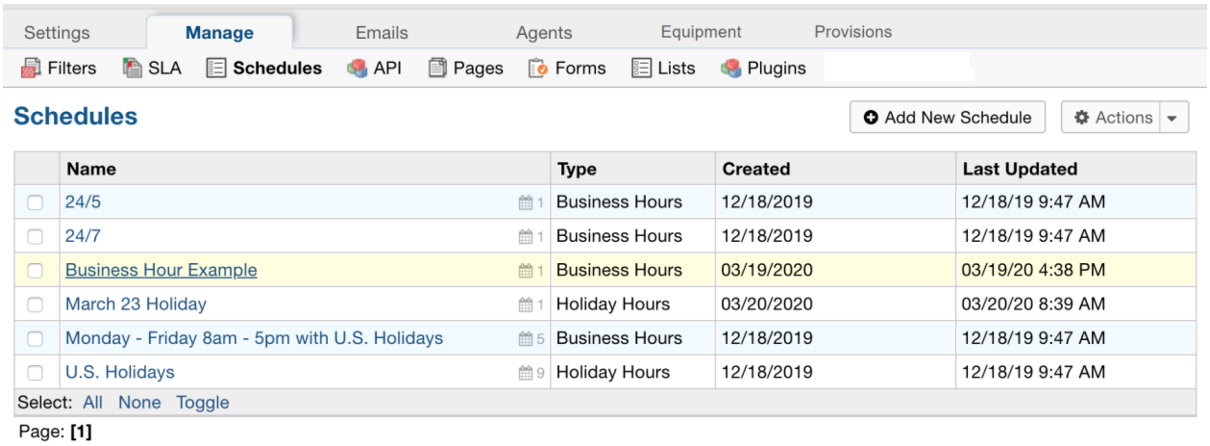


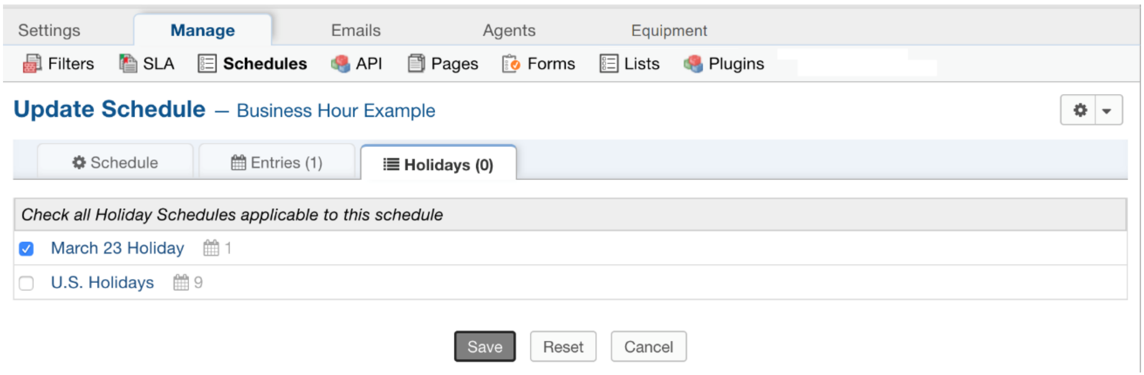
Say the holiday falls on Monday, March 23rd each year.

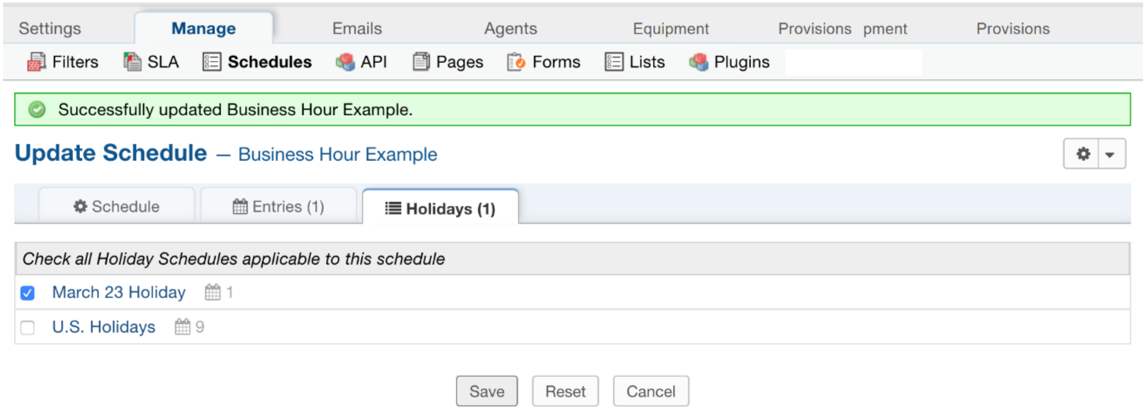




Now that the holiday is set up, we will apply it to the schedule created.

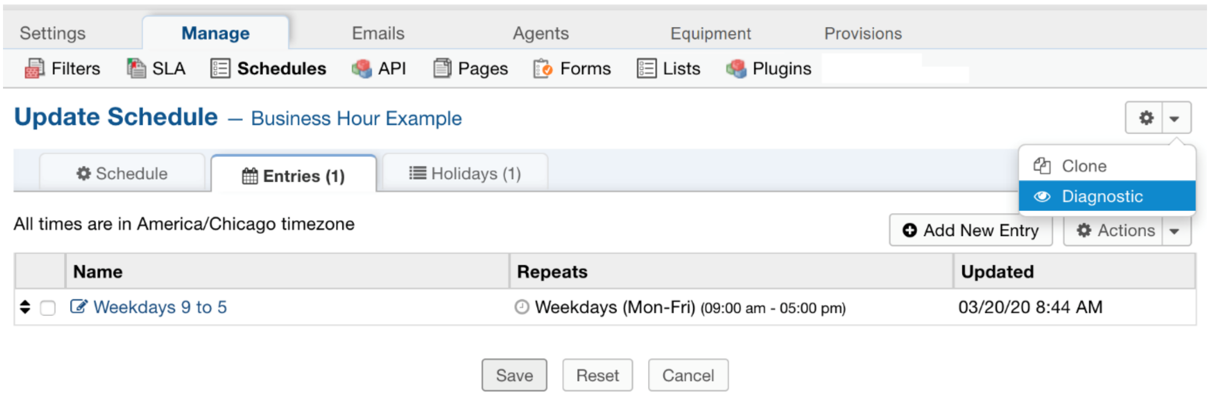


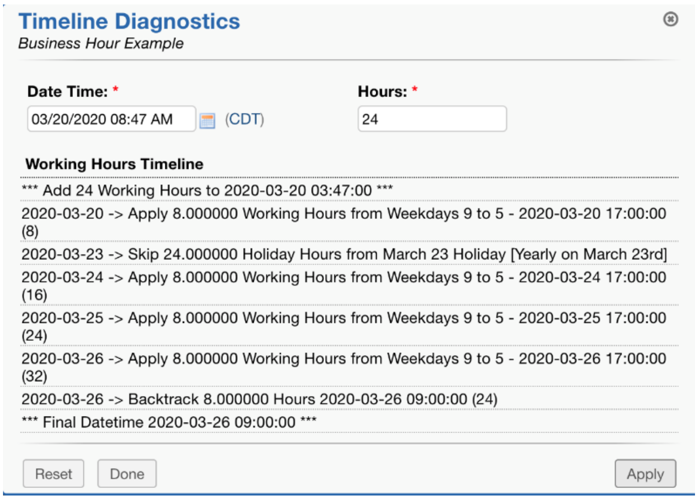




Diagnostics

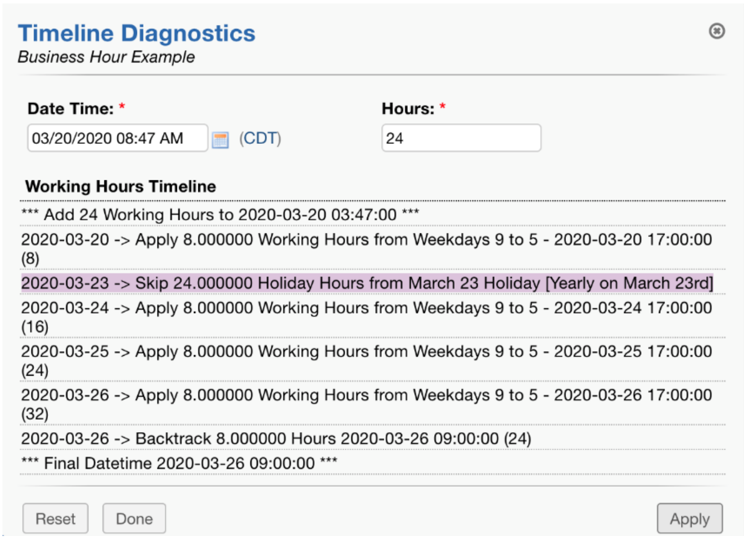
After you have everything configured, you have the option to look at a diagnostic tool to show what your working schedule will look like.





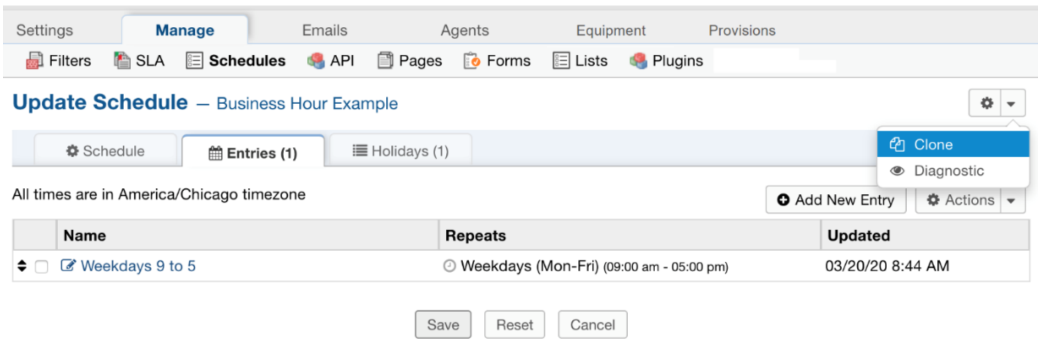
The number of hours you specify will show what your schedule will look like for that number of working hours.

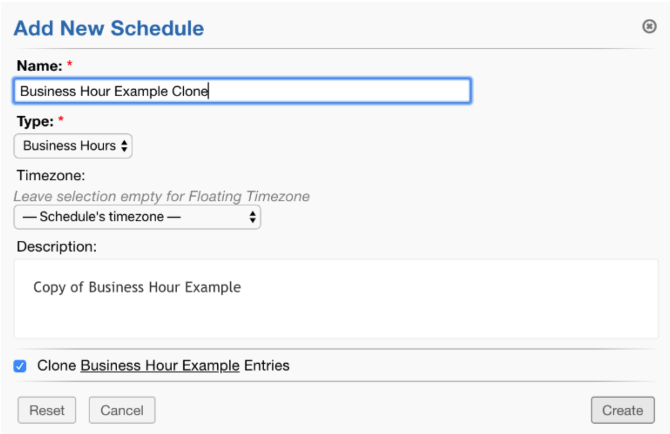
As you can see, the schedule shows the holiday we have entered as skipped hours, and it picks up the following day.

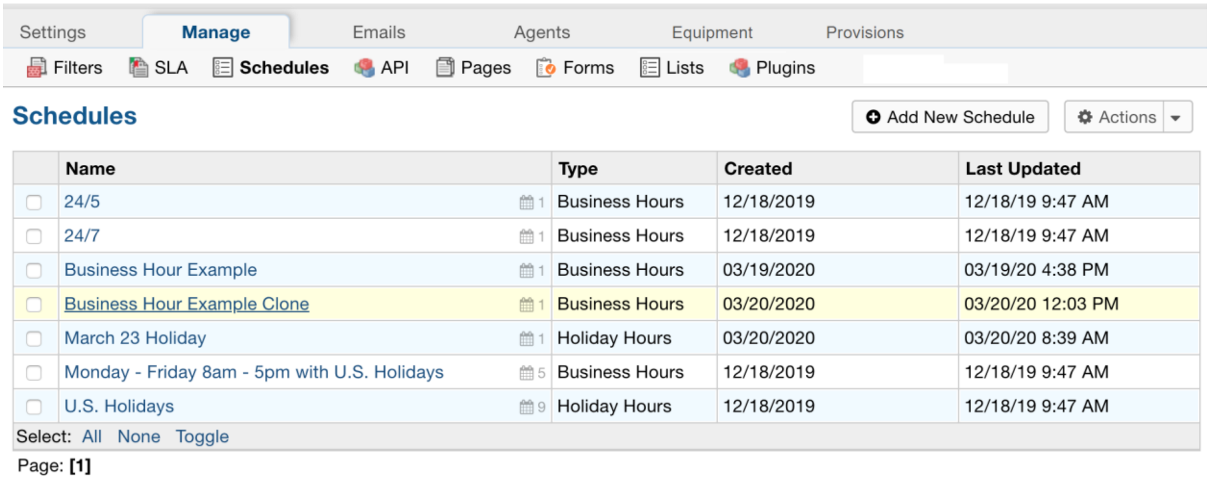


Clone a Schedule

You also have the ability to clone a schedule using the same dropdown.







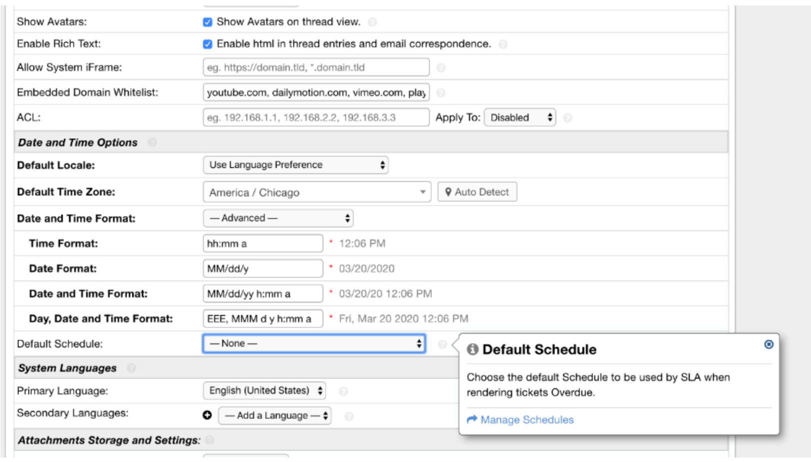
Now that we have built out the schedule and assigned holidays to it, we can specify where the schedule should be used.

Schedules can be assigned in several places in the helpdesk.

System Default Schedule

You can choose a default schedule for the whole system.

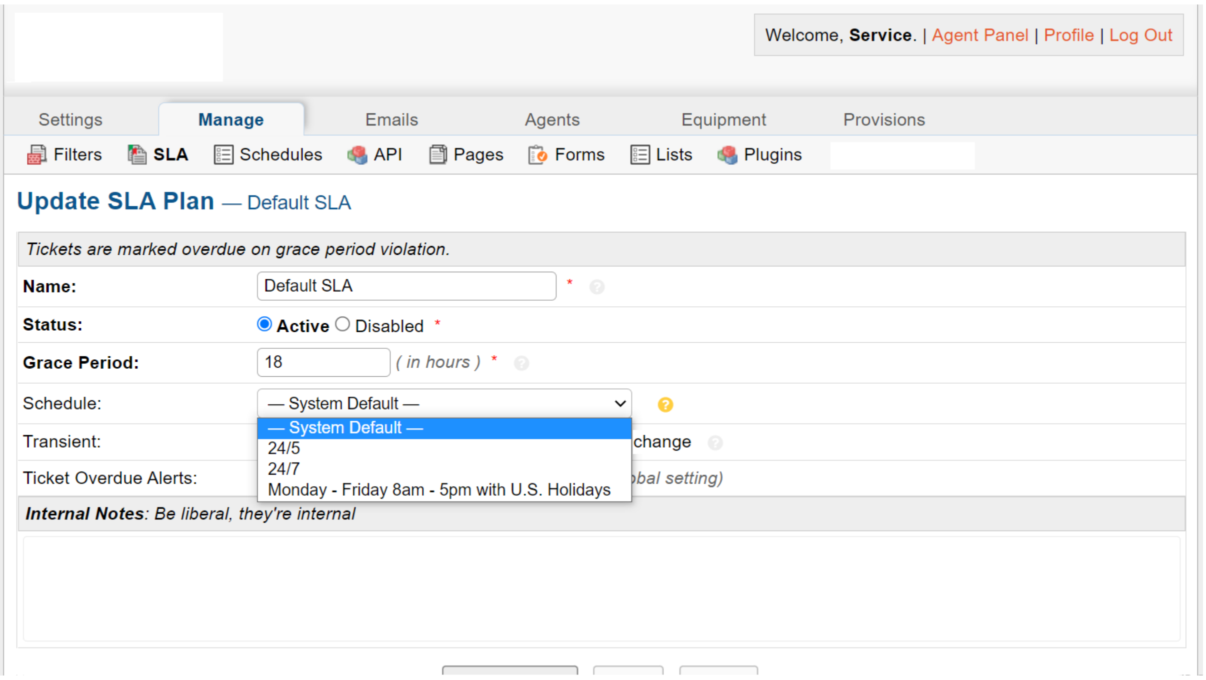
Settings | System



SLA Schedule

SLA's can be assigned a schedule.

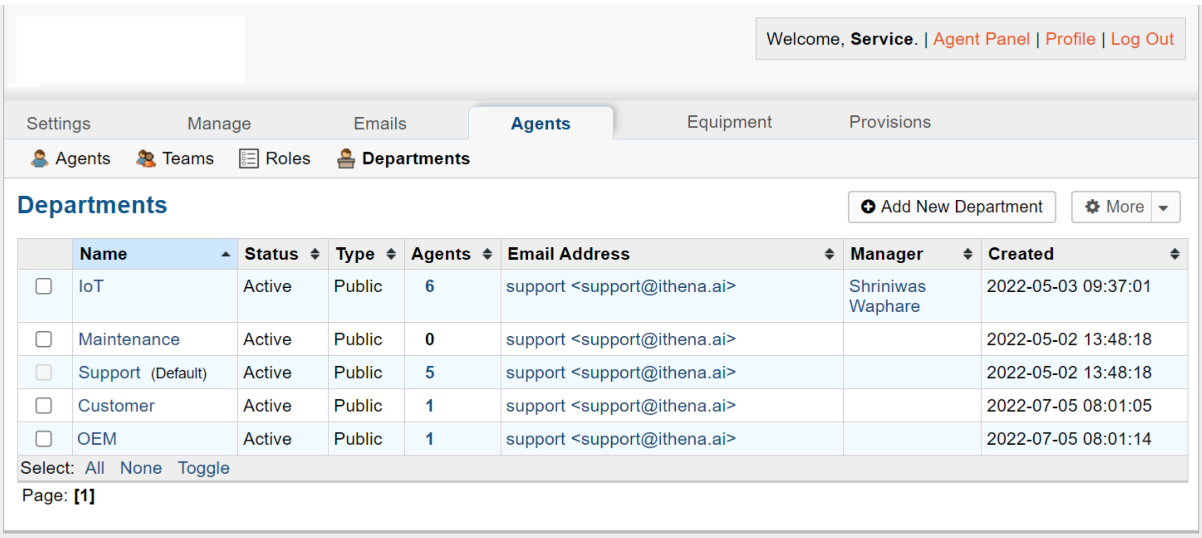
Manage | SLA | click SLA to update the plan.

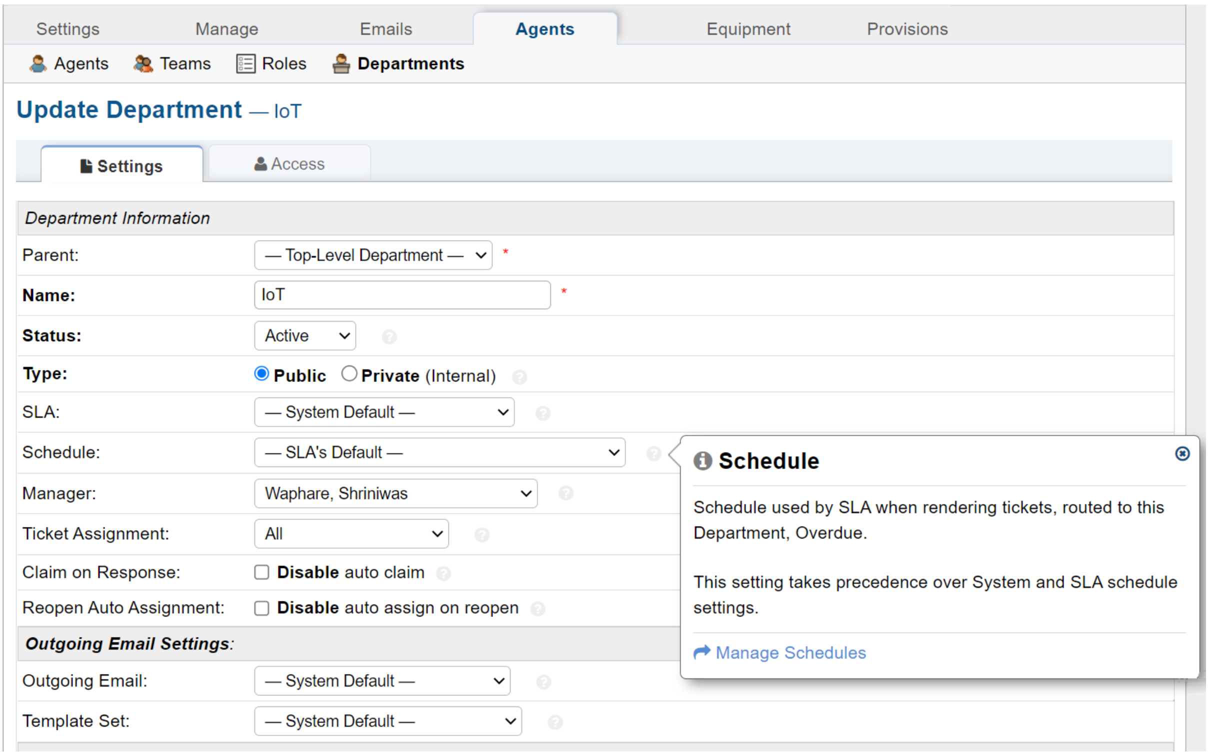


Department Schedule

Departments can be assigned a schedule as well.

Agents | Departments | choose Department





If no Schedule is chosen, the SLA's default Schedule will be assigned.

If the SLA doesn't have a Schedule specified, the System Default Schedule will be applied.

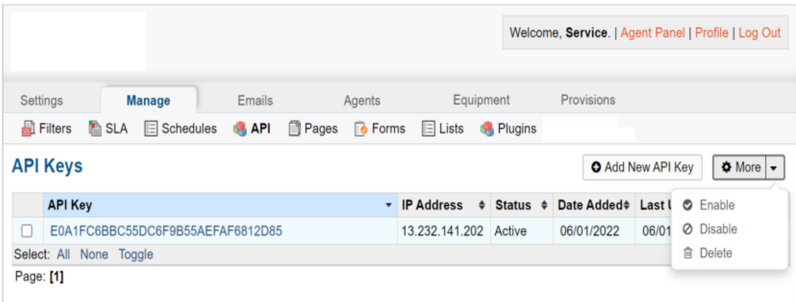
If your helpdesk doesn't have a default Schedule chosen, your Tickets will be marked overdue based on the SLA assigned to the Ticket.

API Keys

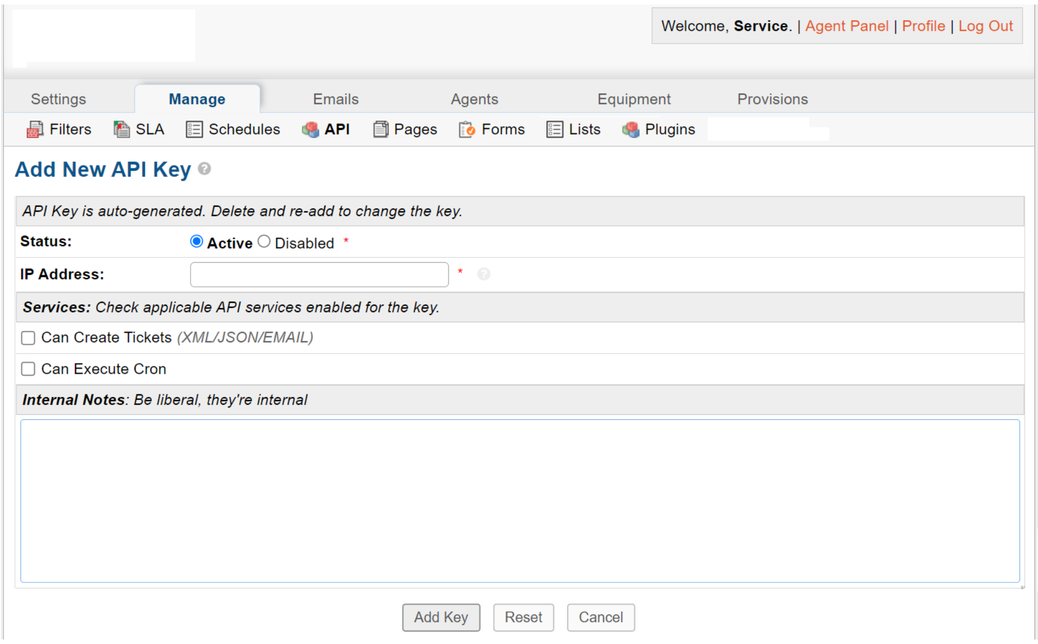
Admin Panel > Manage > API Keys

Adding/Enabling/Disabling/Deleting an API Key

In this section, API keys can be added with the 'Add New API Key' button, and they can be enabled/disabled/deleted by clicking on the checkbox next to the key, then clicking on the top right drop-down menu.



The following image is the information page where an API Key can be entered and Added. At this page, the API Key can be set to Active or Disabled, the IP address of the server that hosts the software. Then, Ticket Creation and Cron services can be enabled for the key. Finally, an internal note can be inserted to note the reason for this key.



Pages

Admin Panel > Manage > Pages

Edit Site Pages

Your Site Pages are what End-Users will view at various points when they are on the Client Portal.

These pages include:

Landing, **Offline** and **Thank You**

The **Landing** page is the first view an End-User will see when they access the Client Portal. It is where the end-users are welcomed, allowed to create a ticket, and can check the status of tickets.

The **Offline** page appears to end-users when the help desk is disabled.

The **Thank You** page appears once the end-user has created and submitted a ticket but is not logged into the client portal of the help desk.

To edit these Site Pages, locate the Manage tab in the Admin Panel and select Pages. Then, click on the title of the page to be edited. Edit the page as desired- this can include logos, pictures, screenshots, YouTube videos, etc., to customize the page to meet specific needs.

Once done editing the page, click **Save Changes** at the bottom to save edits.

Forms

Admin Panel > Manage > Forms

Creating and Using Forms

A great way to customize the help desk to suit your unique use case is to add custom fields to either a built-in form for each ticket created from the Client Portal or internal tickets opened by agents. Included in the Help Desk are built-In Forms and the ability to create Custom Forms.

Custom Forms

Custom Forms allow you to create a variety of answer fields which are all customizable. Fields can be listed as internal- to be utilized by staff for internal ticket creation or when editing an existing ticket; or required for when the user submits a ticket. These Custom Forms can then be added to equipment to help improve workflow by capturing any required information from the user when submitting a ticket.

Custom Forms can also be amended to a ticket, a user profile or a Customer by utilizing the “More” quick button on the top right corner.

Built-In Forms

These forms are included on each new ticket that is created by client or staff; regardless of equipment selected. Currently, the software ships with Contact Information, Ticket Details, Task Details, Customer Information, and Company Information as Built-in Forms which are included on each new ticket created. We suggest you preview these built-in forms to see the information contained in them. All can be edited to further work with your company’s workflow. Fields which are marked “Required” will show in bold on the ticket form.

Contact Information: This is the information associated with users in your help desk. This information will not be visible along the ticket header- only with the user’s profile if you click on their name on the ticket header. You can also view and edit this information in the User Directory.

Company Information: This is referring to your Help Desk company information and can be pulled into email templates, signatures, or canned responses utilizing the variables.

Customer Information: You can expand the information you include when creating Customers in your User Directory. This information will only be visible internally by your Help Desk Agents when they are reviewing the information associated with the Customer.

Ticket Details: The information in these fields are collected on each ticket created when Users go to your Client Portal and click “Open a New Ticket” or when tickets are created internally by Agents. These fields can be deemed required and/or internal.

Task Details: The information in these fields are collected on each ticket created when Users go to your Client Portal and click “Open a New Ticket” or when tickets are created internally by Agents. These fields can be deemed required and/or internal.

Field Types and their possible configurations include:

Short Answer: You can limit the number of characters (including spaces) someone can enter into the field.

Config box:

Field Setup-

Size: Width, in characters, that the field box will appear for data entry.

Max Length: The maximum amount of characters someone can type in the field (up to 64,000).

Validator: Select from the list of available validators for the information requested in the short answer including:

IP Address

Phone

Email Address

Number

Custom (regular expression)

Regular Expression

Validator Error: Error message the end-user will see if the information in the field does not match the validator.

PlaceHolder: Text that will appear in the box until the user clicks in the box to input text.

Help Text: Text that will appear under the field to help users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Long Answer: Allows users to include a large amount of text in a form. You can configure to limit as necessary. If there is HTML content in a Long Answer field, we will show only the plain-text content in the ticket header and to view the full HTML content you can click the field in the header to view it.

Config box:

Field Setup-

Width (chars): Width, in characters the text box will be sized.

Height (rows): Number of rows the text box will appear in height.

Max Length: Maximum number of characters allowed to be typed in the box.

Allow HTML: Enable the HTML/Rich Text toolbar for the end-users.

Placeholder: Text that will appear in the box until the end-user clicks on the box to type text.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Date & Time: Allows end-users to select a date from the calendar as well as time. Time is formated in Military Time.

Config box:

Field Setup-

Time: Show time selection with date picker.

Time Zone Awareness: Show date/time relative to user's time zone.

Earliest: Choose the earliest date the end-user can select.

Latest: Choose the latest date an end-user can select.

Allow Future Dates: Check to allow the end-user to choose a date in the future

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Phone Number: To enter a phone number from end-user; can be between 7-16 digits.

Config box:

Field Setup- Extension: Check the box for the end-user to be able to input an extension into a separate field than the phone number.

Minimum Length: Fewest digits allowed for a valid phone number.

Display Format: Currently, only format available is US.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Check Box: Can be utilized in questions requiring only one answer.

Config box:

Field Setup- Description: Text to be shown in line with checkbox widget.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Choices: Allows you to enter items that are chosen by end-user in a dropdown box

Config box:

Choices: Enter the list choices (one per line) for end-users to select from. To protect against spelling changes, “specify key:value names” to preserve entries if the list item names change.

Default: Enter the key value for the item in the choices that the system will default to when the ticket is being created. end-users can select a different value from the list if that is not the choice for them.

Prompt: Leading text shown on the drop down field for the end-user if there is no default choice entered in the configurations.

Multi-select: Enable end-users to choose more than one choice from the drop down box

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Section Break: This feature allows distinction of form sections by adding a break with a title. The field label will show up in a grey box that has extended the width of the form.

Config box:

Field Setup- Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled which will remove it from the form for new entries, but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Information: This field does not require input from the end-user nor the agent when creating a ticket. It is simply a way to communicate some sort of information.

Config box:

Field Setup- Content: Type your message here in a lighter, italicized font.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

File Upload: Allows End-Users to include attachments in association with custom fields other than the Issue Details field located in the Ticket Details form. Please note; attachments can be required for ticket creation if this field is marked as required.

Config box:

Field Setup- Max File Size: Choose maximum size of a single file uploaded to this field.

Restrict by File Type: Optionally, choose acceptable file types.

Additional File Type Filters: Optionally, enter comma-separated list of additional file types, by extension. (e.g .doc, .pdf)

Max Files: Enter the maximum number of files users can upload per response.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Built-In:

Priority Level: (Low, Normal, High, Emergency) If selecting this as a required field, it will override the priority level of the Equipment & Department.

Department: This field will populate the public Departments of the Help Desk

Assignee: This field will populate a list of all Agents of the Help Desk.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Custom Lists:

You must first CREATE a custom List in Admin > Manage > Lists before it will show up in the "Type" of field.

Config box:

Field Setup- Multi-select: Enable end-users to choose more than one choice from the drop down box

Widget: Select the type of List you would like the field to be: Type ahead, Dropdown, or Text Entry.

Prompt: Leading text shown on the drop down field for the end-user if there is no default choice entered in the configurations.

Default: Select the default value for the field from the list items in the drop down; the system will default to this choice when the ticket is being created. end-users can select a different value from the list if that is not the choice for them.

Help Text: Text that will appear under the field to help your end-users and agents creating tickets get a better understanding of the information being gathered.

Settings:

Enabled: This field can be disabled, which will remove it from the form for new entries but will preserve the data on all current entries.

Visible: Making fields visible allows agents and end-users to view and create information in this field.

Required: Determines if information is necessary for new entries to be created All required fields must have valid data.

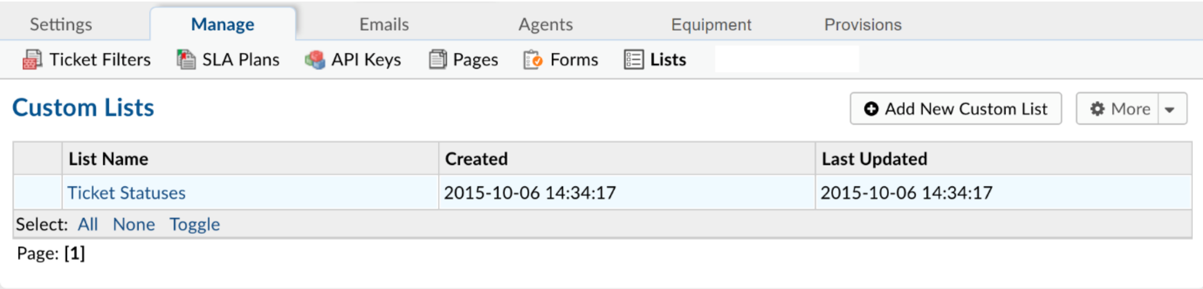
Editable: Fields marked editable allow agents and end-users who are the ticket owner to update the content of this field after the form entry has been created.

Require Entry: Optionally, this field can prevent closing a thread until it has valid data.

Lists

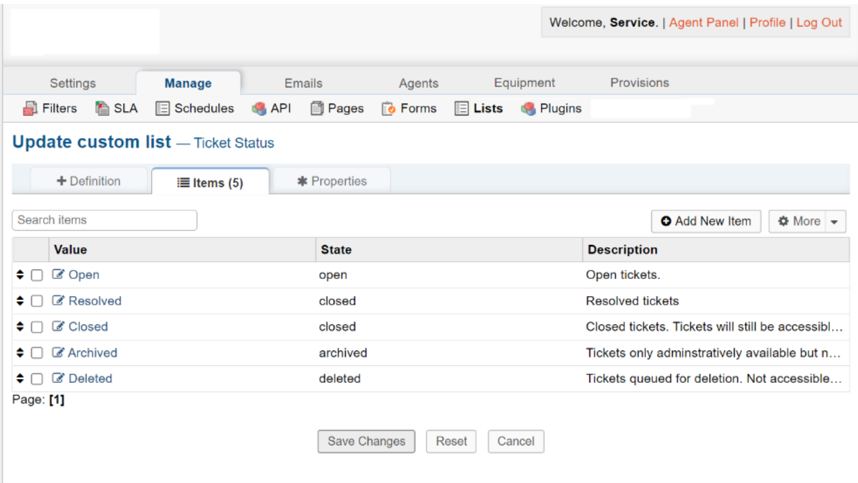
Admin Panel > Manage > Lists

Create New Custom List

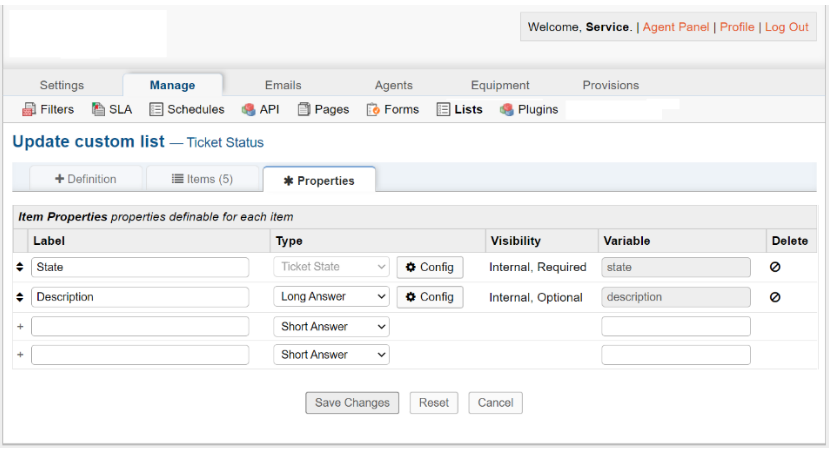


Custom Lists permit the creation of dropdown boxes with predefined options from which an End-User can select on a form. Create a Custom List by going to **Admin Panel > Manage > Lists> Add New Custom List**. The list will show up as a Field Type when creating a field on either a Built-In or Custom Form. Abbreviations are encouraged where applicable as these will be used in association with a list configured as a Type Ahead instead of Drop Down. This Type of List is recommended when you have more than 3 choices.

Additional information can be associated with each List item which will be available for Agents to view.



Item Properties help define additional information for which is unique for each List item. The properties will need to be determined when creating the List and then defined per List item.



Custom Lists can then be added to a Custom Form which will allow the specific information to be captured from the End-Users and Agents when creating tickets.

Once an End-User selects an Equipment that has a Custom Form with the List you've created they will be able to see the List and select a value.

Definition

Name: Name of the custom list. (required)

Plural Name: Plural version of the custom list Name. (not required)

Sort Order: Order you would like the list to be sorted.

Internal Notes: Section for any notes you would like to add.

Properties

Label: Name of the list item.

Type: The type you would like the list item to be.

Visibility: Whether or not you want the item to be seen.

Variable: Variable name for the list item.

Delete: Whether or not you want to delete the list item.

Creating Custom Ticket Statuses

Agents can change the status of a ticket as it progresses through the workflow. Ticket statuses can be automatically configured for the system default, by Ticket Filter upon ticket creation. After creation, status changes must be done manually by agents from within each individual ticket or can be mass changed from the ticket queues of the help desk.

Ticket statuses are set to either an "Open" or "Closed" state but can be titled anything within the help desk. Statuses can also be marked as not reopenable by and end user which, when a ticket is set to such a status, a response from an end user (ticket owner or collaborator) will create a new ticket and not thread into the original; the new ticket will reference the old ticket number in the subject.

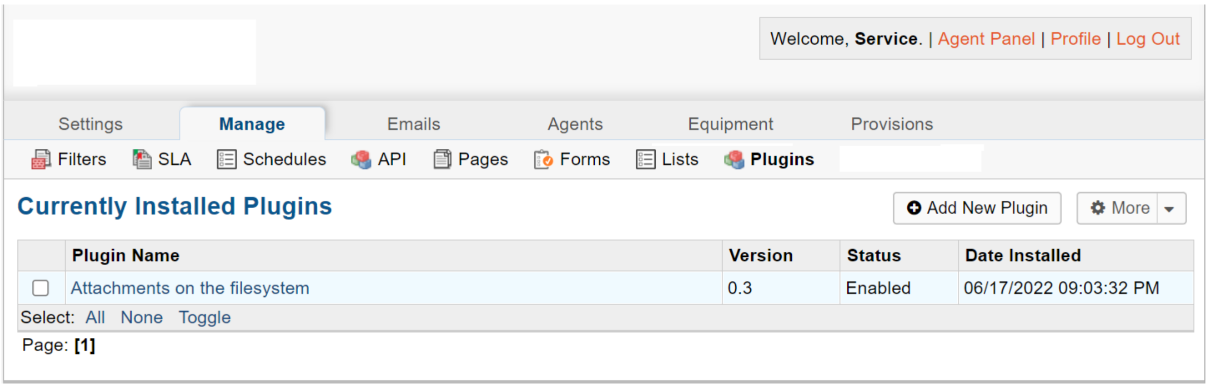
To add a custom status, go to the Admin Panel > Manage > Lists > Ticket Statuses. This is a built-in list which can be expanded to include an unlimited number of Custom Ticket Statuses. Click on the Add New Item to label the Status name in the "Value" box; configure the state (Open or Closed) of the new Ticket Status in the Properties tab of the pop-up box. If selecting a Closed state with the ticket status, additional boxes will populate in the tab to determine if the ticket can be reopened by the end user's response as well as what Open state status it is to be set to upon reopen.

Only agents with the ability to close tickets will have access to ticket statuses which are set to a closed state; otherwise, agents will only see ticket statuses set to an Open state. Tickets created via email will be set to the Default ticket status set in the Admin Panel > Settings > Tickets unless overridden by a Ticket Filter.

Plugins

Admin Panel > Manage > Plugins

Add New Plugin



To add a plugin into the system, download and place the plugin into the include/plugins folder. Once in the plugin is in the plugins/ folder, it will be shown in the list.

EMAILS TAB

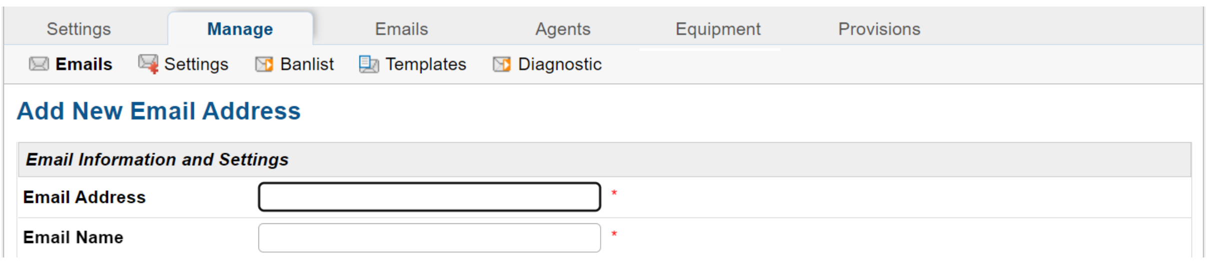
Emails

An unlimited number of email addresses can be routed through the help desk. You can configure IMAP or POP3 settings for an email so the system can fetch mail from the mailbox and create tickets. You can also configure SMTP settings for an email so the system can send mail from the address. Additional settings can be configured to change certain things on New Tickets that are fetched from the address.

Add New Email

Admin Panel > Emails > Emails > Add New Email

First, click the Add New Email button on the right-hand side of the screen. Once on the Add New Email page you can start by inputting the email address and the name you want the end Users to see as to whom the email is from.



Optionally, configurations such as the Department the ticket will be routed to as well as assigning a equipment can be determined for this email address.

New Ticket Settings	
Department	— System Default —
Priority	— System Default —
Help Topic	— System Default —
Auto-Response	☐ **Disable** for this email

The **Username** and **Password** are required to fetch email from IMAP / POP mail boxes as well as to send email through SMTP.

The Username is utilized in the email authentication process. We accept single address strings, shared mailbox strings, server name + username strings, and a combination of all.

Email Login Information	
Username	
Password	

To configure email fetching via IMAP or POP, fill in the information for the email address.

Fetching Email via IMAP or POP	
Status	○ Enable ◉ Disable
Hostname	
Mail Folder	INBOX
Port Number	
Mail Box Protocol	— Select protocol —
Fetch Frequency	5 minutes
Emails Per Fetch	10
Fetched Emails	○ Move to folder: ○ Delete emails ○ Do nothing *(not recommended)*

Status: Enable or Disable Email Fetching

Hostname: The IMAP/POP3 hostname for your mail server. You can check your provider's documentation for the specific hostname to use.

Mail Folder: Enter the Folder name that you wish to fetch mail from. If left empty, the system will fetch from the INBOX.

Port Number: The IMAP/POP3 port number for your mail server. This may be available in the documentation for your hosting account or from your email administrator. If using non-standard Port number with SSL enabled, then prefix the hostname with ssl:// or tls:// scheme to hint to supported encryption.

Protocol: Select the mailbox protocol supported by your remote mail server. IMAP on a secure port is highly recommended.

Fetch Frequency: Enter how often, in minutes, the system will poll the mail box. This will define the average delay in receiving an Auto-Response after a User sends an email to this mail box.

Emails Per Fetch: Enter the number of emails processed at one time.

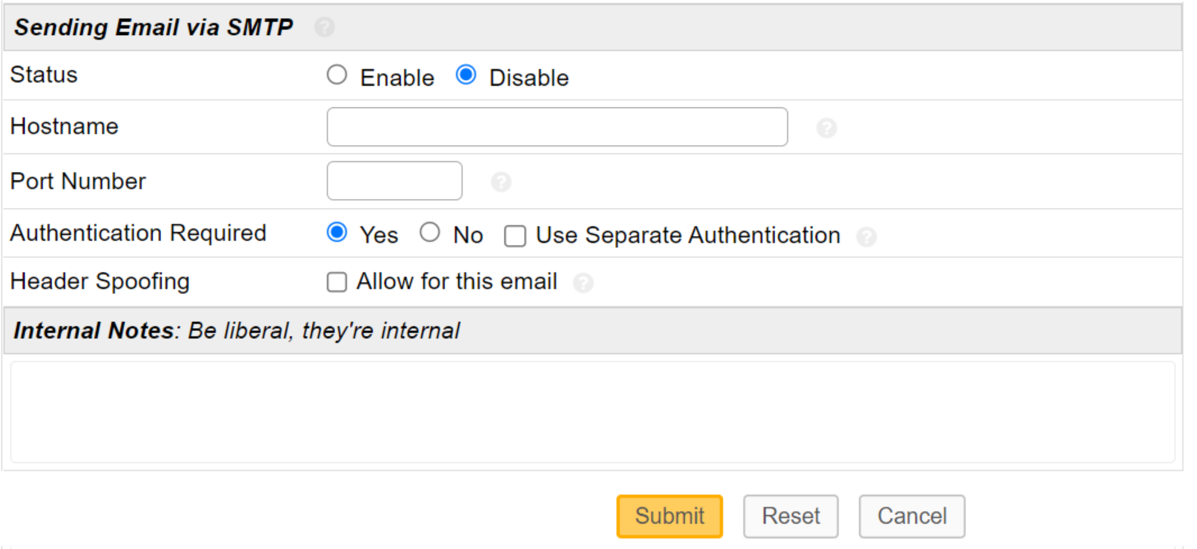
Fetched Emails: Decide what to do with processed emails:

Move to Folder: This will back up your email from the INBOX to a folder you specify. If the folder does not yet exist on the server, the system will attempt to automatically create it. (Recommended)

Delete Emails: This will delete your email from the INBOX once it is processed.

Do Nothing: This will leave emails in your INBOX. The system will record the message ids of your email and attempt not to fetch it. However, this option may cause duplicate tickets to be created. (Not Recommended)

Next, you will need to setup the SMTP configurations for the email address in the last section. Click **Enable** and fill in the information for the email address.



Status: Enable or Disable Outgoing Email.

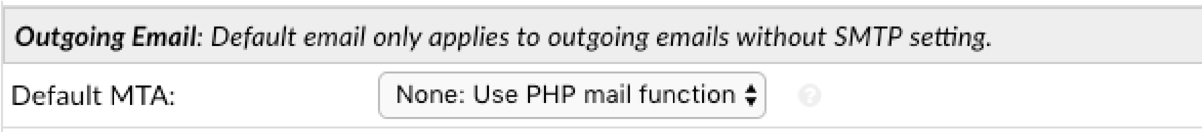
Hostname: The SMTP hostname for your mail server. You can check your provider's documentation for the specific hostname to use.

Port Number: The SMTP port number for your mail server. This may be available in the documentation for your hosting account or from your email administrator. If using non-standard Port number with SSL enabled, then prefix the hostname with ssl:// or tls:// scheme to hint to supported encryption

Authentication Required: If this setting is Disabled, the system will use the same Authentication Credentials as entered above. If you require separate credentials for Fetching and SMTP, you can Enable this setting and enter your SMTP Authentication Credentials. If you use separate authentication, check the corresponding checkbox and specify Username and password details.

Header Spoofing: Enable this to allow sending emails via this mailbox from an address other than the one given in the **Email Address** setting. This advanced setting is generally used when sending mail from aliases of this mailbox.

Once you have the email's SMTP setup, you will need to make it your System Default Outgoing email address by going to **Admin Panel > Emails > Settings** and changing the second to last box to the email address you just configured SMTP for.



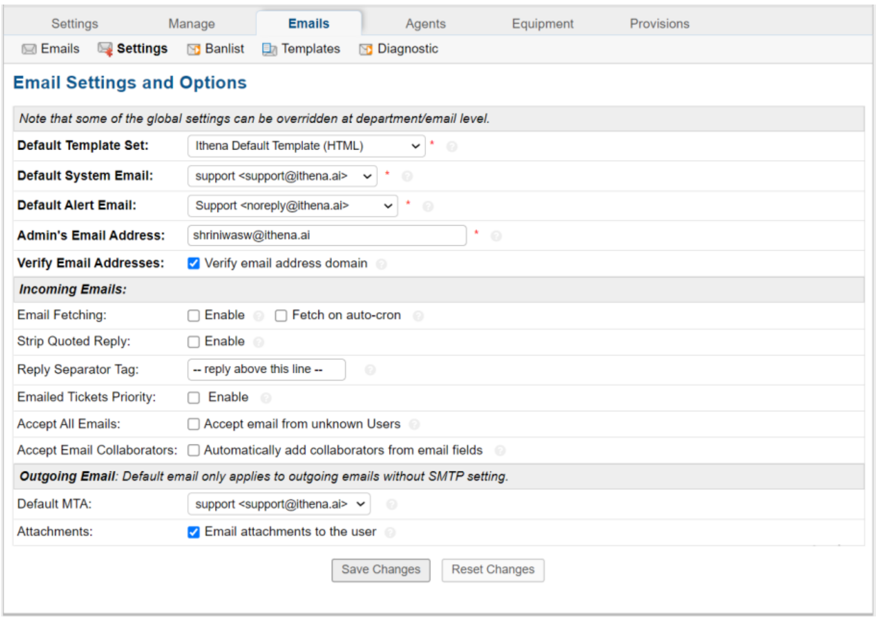
If you would like this same address used for each department, you will need to assign the email address as the outgoing email address for each department individually. You can do this by going to **Admin Panel > Agents > Department > (click on department name)**, go to the **Autoresponder Settings** section, and change the **Auto-Response Email**.

Settings

Admin Panel > Emails > Settings

Settings & Options

The system default email settings can be determined at the Admin Panel > Emails > Settings tab. This includes the Incoming Email global settings, default Outgoing Email address, and enabling Email Fetching.

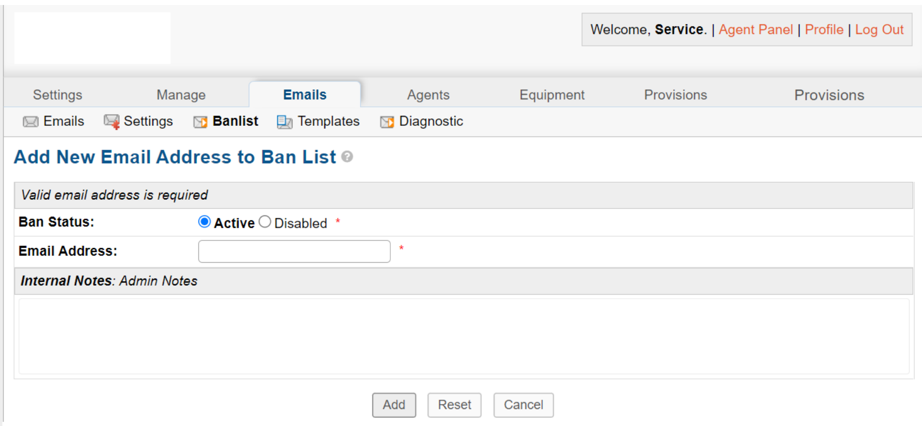


It can be determined on this sub-tab if Collaborators can be added to tickets via email, if tickets from unregistered (unknown) Users will be accepted, and if Attachments can be emailed to Users from Agents. Please note: Users are considered unknown to your help desk if they are not currently in the User Directory. Users can be added by agents or auto added.

Ban List

Admin Panel > Emails > Ban List

Email addresses that have been banned from the help desk to prevent tickets from being created will be listed here. Email addresses can be added or removed from the Ban List at any time.

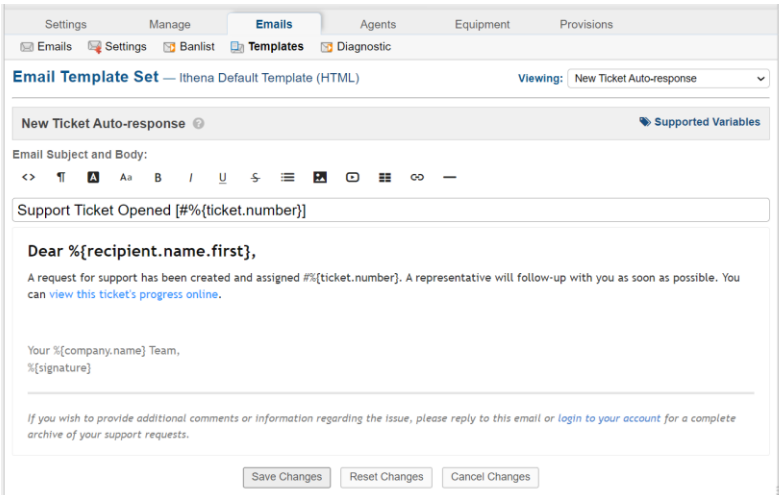


Templates

Admin Panel > Emails > Templates

iSERV contains stock messages that are sent out to both Agents and End Users during specific events of a ticket's life cycle. These email message templates can be edited, disabled globally or locally, as well as cloned and assigned to different Departments. When editing, the messages in the templates each have an HTML/Rich Text toolbar for design and brand flexibility.

All templates can include variables which will automatically pull that information (if available) from a submitted ticket.



The entire set of email templates can be cloned for use and assigned to a specific Department of the Help Desk. This is especially useful if the messages need to be different for tickets assigned to the Department.

Supported variables

An unlimited number of Forms can be built with an unlimited number of fields. You can add a variable name to all fields so that you can use them in Canned Responses and Email Templates. Template Variables utilize the type ahead feature so to populate the available, relevant variables simply type %{ to initiate the Variable Type ahead and then select the variable name.

Various areas of the helpdesk can contain custom fields such as the Contact/User Information form, Ticket Details form, Customer form, Company Information form, and Task Details form. To use custom form fields in Canned Responses and Email Templates, each variable must be unique.

When editing email templates, only the available variables for use in the message will appear in the drop down. You can further expand the templates where applicable by entering a period after the last character in the variable. This will produce all available extensions for that variable.

Fields on the User Information built-in form can be built with this format:

%{ticket.user.field_variable}

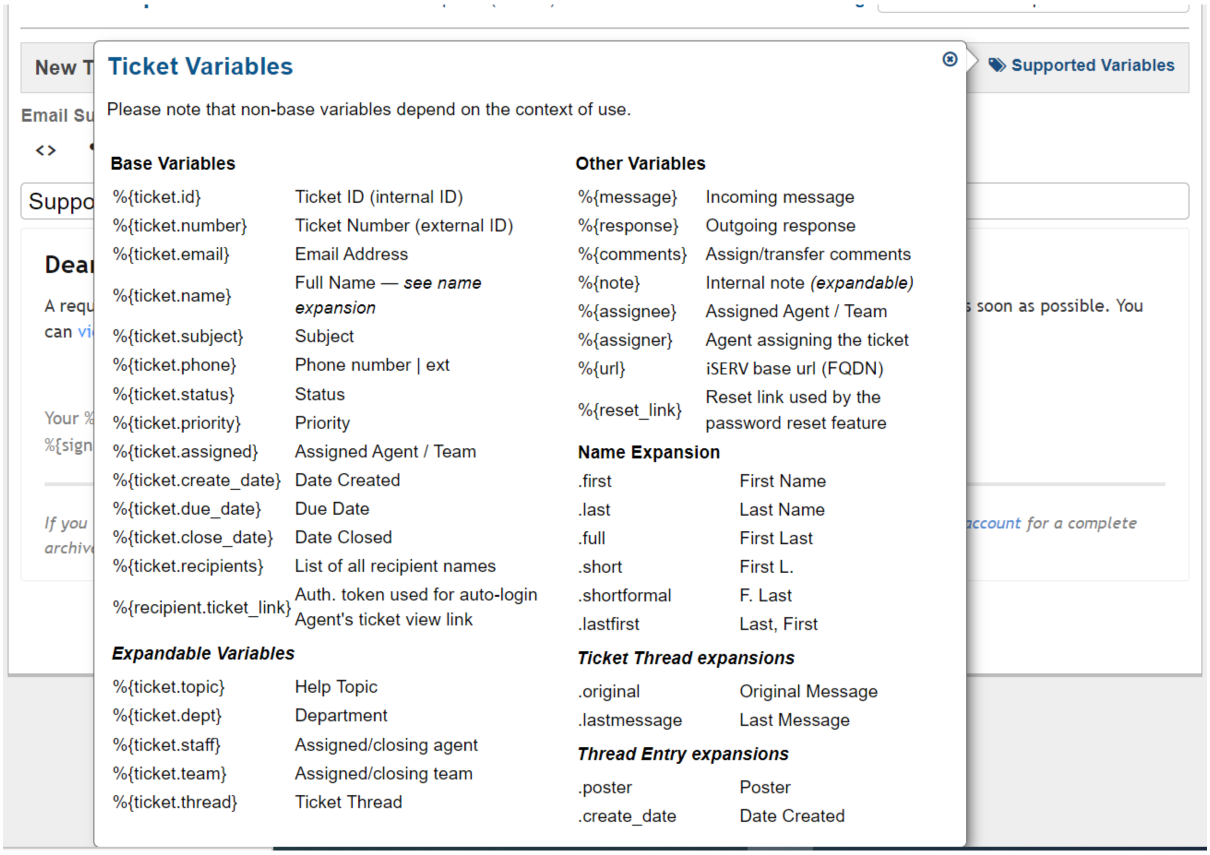
Fields on the Ticket Details built-in form or a custom form with defined variables can be built with this format:

%{ticket.field_variable}

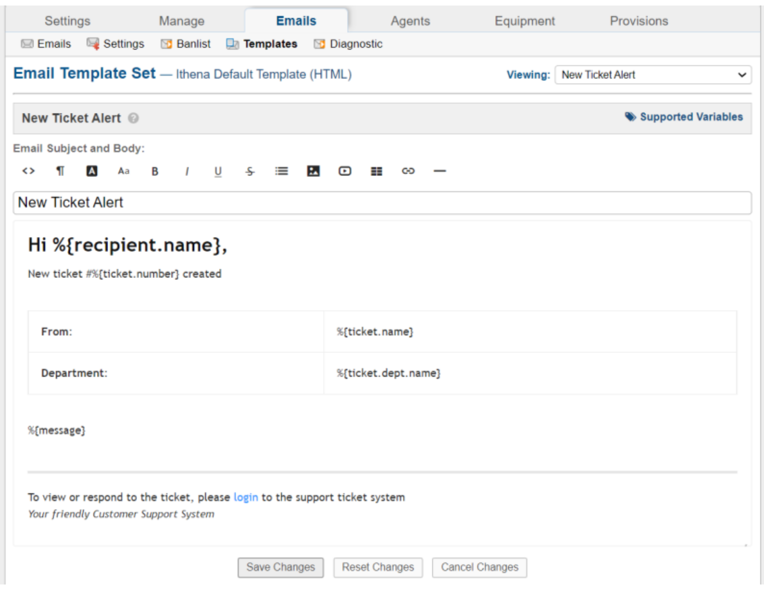
Fields on the Ticket Details built-in form or a custom form involving a Custom List with defined Properties can be built with this format:

%{ticket.field_variable.property_variable}

Within each email template there is a Supported Variables option in the upper right corner that will provide a partial list of the variables available. As the forms are built out to contain additional fields there will be more variables available to be used in the email templates and canned responses.



Using both built in form fields and any custom form fields, email templates can be edited to contain the information provided by the End-User if their information in those fields on the forms otherwise the variable name will appear in the email template.

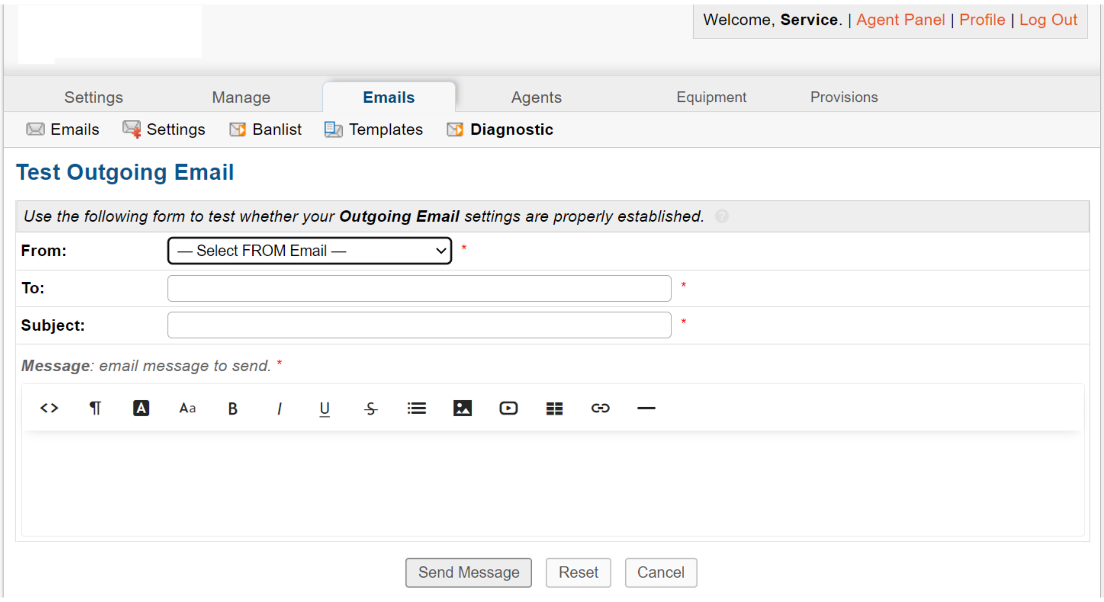


Diagnostics

Admin Panel > Emails > Diagnostics

Test Outgoing Mail

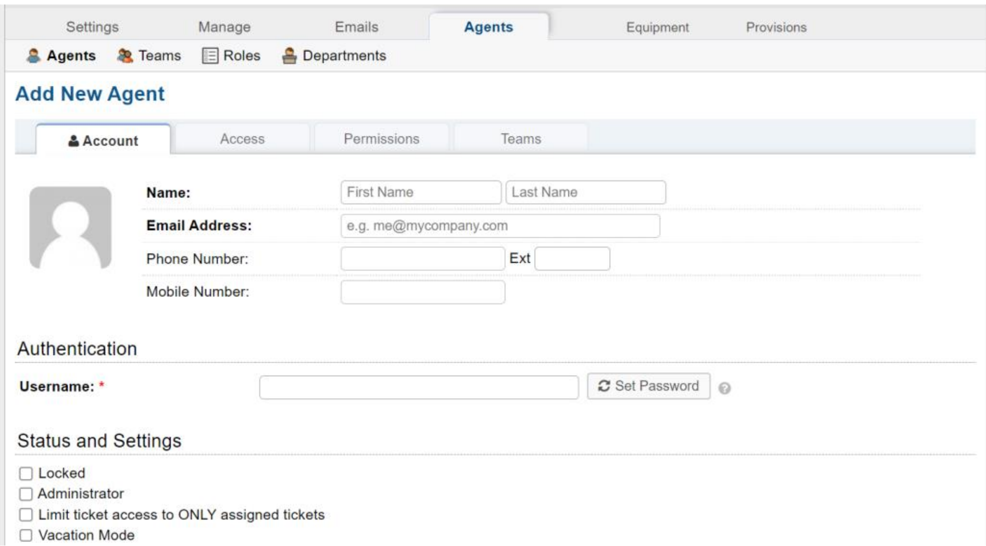
Tests whether your Outgoing Email settings are properly established.



AGENTS TAB

Agents

Admin Panel > Agents > Agents



Account tab opens. From here, you can create/add administrators solely, agents from the organization or agents who have administrator level privileges as well. The Administrator privileges can be assigned by checking **Administrator** option checked under **Status and Settings**. Agents marked as "Administrator" simply have access to the Admin Panel are able to make global configuration changes to the help desk. Agents with access to the Admin Panel can grant additional agents access to this panel for global configurations.

Provide complete **Name** with **Email Address** and other details.

For **Authentication**, provide **Username** and click **Set Password**.

If necessary, administrators can manually reset an agent's password by unchecking the option clicking the **Set Password** box in the middle of the Account page. This will produce a pop-up box with two options; the first is to send a password reset email to the agent.

The second option for the admin is to uncheck the box which will populate fields to manually set a password for the agent. Once manually set, the admin will need to communicate this to the agent allowing them to log-in; the agent can be forced to reset the password upon logging in by keeping the box checked at the bottom left of the pop-up.

Reset an agent's password

If necessary, administrators can manually reset an agent's password by clicking the Set Password box in the middle of the Account page. This will produce a pop-up box with two options; the first is to send a password reset email to the agent. **Please note**, if the agent has not first set a password post-creation they cannot reset said password. The second option for the admin is to uncheck the box which will populate fields to manually set a password for the agent. Once manually set, the admin will need to communicate this to the agent allowing them to log-in; the agent can be forced to reset the password upon logging in by keeping the box checked at the bottom left of the pop-up.

Status and Settings

Locked: Agents who are Locked/Disabled are unable to log into the help desk. They will not be visible for assignment or auto assignments. Email alerts will not be sent to disabled agents as well.

Administrator: Agents marked as "Administrators" simply have access to the Admin Panel are able to make global configuration changes to the help desk. All changes are effective moving forward and will not revert to previously configured settings. Agents with access to the Admin Panel can grant additional agents access to this panel for global configurations.

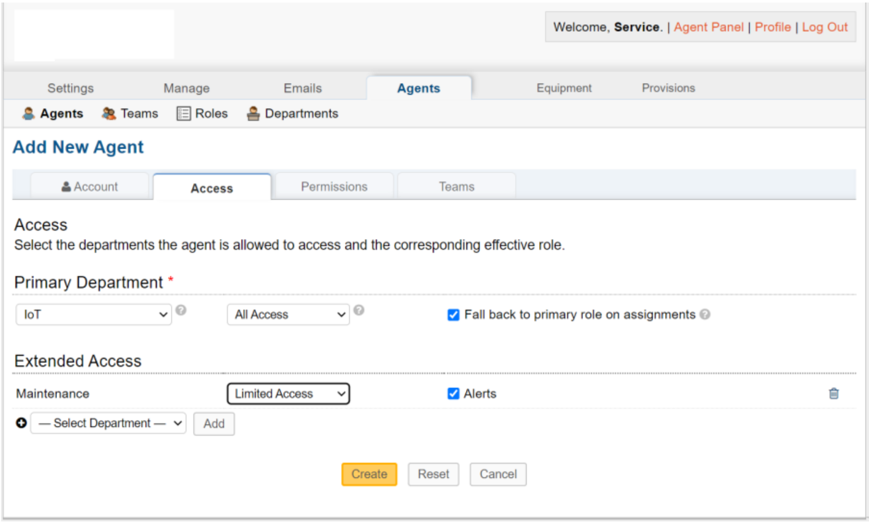
Limit ticket access to ONLY assigned tickets: When this is checked these agents will only see tickets which are directly assigned to them as an agent or a team to which the agent belongs- regardless of department access. Once tickets are set to a status of a closed state, the assignment is released and the agent will lose access to these closed tickets; if the ticket is reopened, the agent could regain access if it is reopened assigned to them.

Vacation Mode: Agents who are on vacation mode are able to log into the help desk but, like Locked/Disabled agents, they will not be visible for assignment or auto assignments and email alerts will not be sent to these agents as well. An agent can manually set themselves to Vacation Mode in their Profile or an agent with access to the Admin Panel. Vacation Mode must be manually enabled as well as disabled.

Agent Access

Agents are given access to the help desk with the intent to respond and resolve the tickets. When adding an Agent to the help desk, they will need to be assigned to a Primary Department and given a Primary Role for the Tickets/Tasks routed to that department. Agents can be given Extended Access to additional departments of the help desk as well as assigned different Roles to those departments; this can be configured in the Access tab of the Agent’s Profile.

For agents without department access which are granted access to tickets via Ticket Assignment/Ticket Referral, they will have Primary Role Permissions for tickets if this is checked. Otherwise, Agents will have a view only access to these tickets allowing them to post an internal note only.



NOTE: Agents can be given **Extended Access** to additional departments of the help desk as well as assigned different Roles (list populated from **Admin Panel > Agents > Roles**) to those departments; this can be configured in the Access tab of the Agent’s Profile. **Please note that for associating a department to an Agent, you need to first create a Department from Agents > Departments**. *After creation, the list of departments in a parent/child relationship format shall be displayed here*. These access details are required on a mandatory basis for successful creation of an agent.

Agent Permissions

Users

Create: Ability to add new users

Edit: Ability to manage user information

Delete: Ability to delete users

Manage Account: Ability to manage active user accounts

User Directory: Ability to access the user directory

Customers

Create: Ability to create new customers

Edit: Ability to manage customers

Delete: Ability to delete customers

Documents

Document: Ability to add/update/disable/delete document categories and documents

Miscellaneous

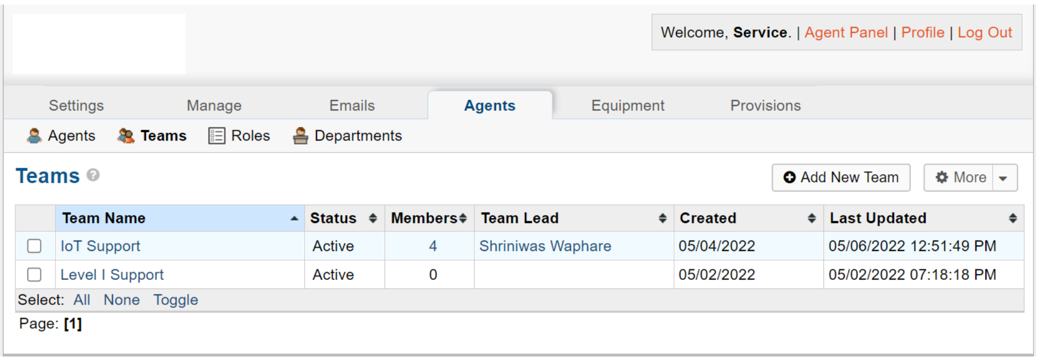
Banlist: Ability to add/remove emails from banlist via ticket interface

Search: See all tickets in search results, regardless of access

Stats: Ability to view stats of other agents in allowed departments

Teams

Admin Panel > Agents > Teams



Create Teams in Your Help Desk

Teams allow you to pull Agents from different Departments and organize them to handle a specific issue or user via a specific equipment or Ticket Filter.

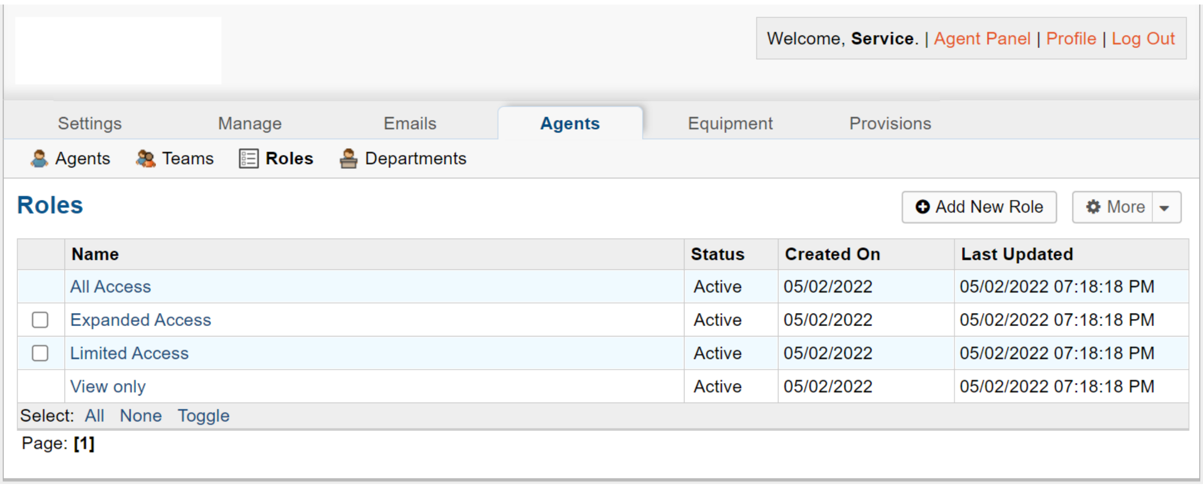
Having Agents from different Departments assigned to a Team will supersede the parameters of the Agents' Department rules.

To create a Team in your Admin Panel, locate the Agents tab, and click on Teams. Then click Add New Team on the right, and fill out the appropriate information. Then you will be able to add Agents to the team by clicking on their name from your list of Agents and checking the corresponding box next to the Team name you wish to add them at the bottom of the page.

A Team can have an appointed leader who can receive Alerts & Notices separate from other team members. In order to set a Team Leader, you can choose an Agent from the Team Lead dropdown when creating a Team or Editing an existing Team.

Roles

Admin Panel > Agents > Roles



Roles are the permissions granted to Agents per Department that they have access to. Each Role has a set of permissions that can be checked/unchecked for agents given that Role in association with a Department they have access to. An unlimited number of roles can be created and assigned to Agents with access to various departments.

Role Permissions for Tickets include:

Assign: Ability to assign tickets to agents or teams

Close: Ability to close tickets

Create: Ability to open tickets on behalf of users

Delete: Ability to delete tickets

Edit: Ability to edit tickets

Edit Thread: Ability to edit thread items of other agents

Link: Ability to link tickets

Mark as Answered: Ability to mark a ticket as Answered/Unanswered

Merge: Ability to merge tickets

Post Reply: Ability to post a ticket reply

Refer: Ability to manage ticket referrals

Release: Ability to release ticket assignment

Transfer Ability to transfer tickets between departments

Role Permissions for Tasks include:

Assign: Ability to assign tasks to agents or teams

Close: Ability to close tasks

Create: Ability to create tasks

Delete: Ability to delete tasks

Edit: Ability to edit tasks

Post Reply: Ability to post task update

Transfer: Ability to transfer tasks between departments

Role Permissions for the Documents include:

Premade: Ability to add/update/disable/delete canned responses

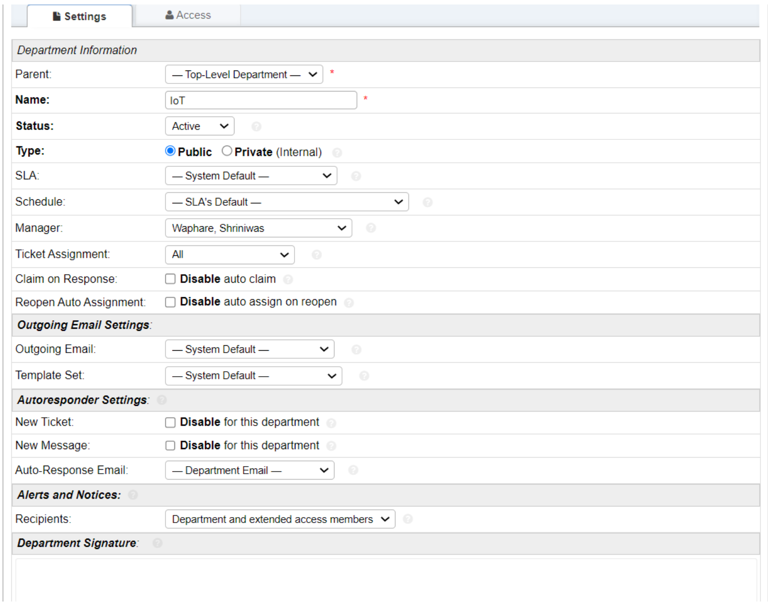
If granted access to the Admin Panel, that Agent will have the ability to make changes in the configurations of the help desk. From the Agent tab of the Admin Panel, the configurations of each Agent of the help desk can be modified, including the ability to Limit an Agent's access to only tickets that are specifically assigned to them.

The Permissions tab of the Agent profile allows the Agent functionality within the help desk which are not Department specific access items. Areas such as the User Directory, Customers, and Documents can be limited per Agent. This includes the ability to search for and see the ticket metadata for tickets the Agent does not have access to, the email ban list, and other staff statistics on the dashboard.

8.4. Departments

Admin Panel > Agents > Departments

Since tickets are routed through Departments in the help desk, there are many settings that can be set for each Department.



Department Information:

Parent: If nesting departments, this is the Parent Department to nest the department under. Please note: If an agent has access to the Parent Department, they will see the tickets of nested or child departments also, but access does not extend from child departments to Parent Departments.

Status: The status of the department will determine its visibility as well as if tickets can be routed to that department.

Active: The department is available when transferring tickets.

Archived: The department is no longer in use and cannot be selected to transfer any ticket. Also, if tickets in that department are reopened via an End-User response it will create a new ticket referencing the original ticket number and subject line but the department will be the system default.

Disabled: Tickets can no longer be transferred to this department and any tickets set up to be auto routed to this department will now be routed to the default department in the Helpdesk. Closed tickets in this department will reopen if the End-User responds.

Name: Department name as it will be displayed throughout the helpdesk.

Type: Select Private if you wish to mask assignments to this Department in the Client Portal. Additionally, when labelled as Private, the **Department Signature** will not be displayed in email replies. At least one department of the help desk must be Public.

SLA: Service Level Agreement for tickets routed to this Department. This the expected amount of time (in hours) that a ticket is expected to be closed once opened. If the ticket is not closed in the allotted amount of time, it will then be Overdue.

Schedule: Schedule is used by the Service Level Agreement when rendering tickets routed to this Department. This setting takes precedence over System and SLA schedule settings.

Manager: Electively, select a Manager for the departments of the help desk. Managers can be configured to receive special alerts. The list is populated from **Admin Panel > Agents**.

NOTE: Prior to adding agents, departments should be created first since agents are to be associated with the department while granting access. Revisit **Admin Panel > Agents > Departments** for associating **Manager** details for that department.

Ticket Assignment: Enable this to restrict ticket assignment to include only members of this Department. Department membership can be extended based on Agent's Department Access, if **Alerts & Notices Recipients** includes those with department access.

Claim on Response: Check this to **disable** auto-claim on response/reply for this department. Agents can still manually claim unassigned tickets.

Reopen Auto Assignment: Check this to disable auto-assignment of reopened tickets for this department. Otherwise, the Ticket will be auto assigned to the last responding Agent.

Outgoing Email Settings:

Outgoing Email: Email Address used when responses are sent to Users when Agents post responses to Tickets.

Template Set: Email **Template Set** used for Auto-Responses and Alerts & Notices for tickets routed to this Department. Template sets can be cloned and edited for department use in the Admin Panel > Emails > Templates.

Auto Responder Settings: This allows you to override the global Autoresponder settings for this Department.

New Ticket: If checked, this will disable the New Ticket Auto-Response sent to the User when a new ticket is created and routed to this Department.

New Message: If checked, this will disable the Auto-Response sent to the User to confirm a newly-posted message for tickets in this Department.

Auto-Response Email: Select an email address from which Auto-Responses are sent for this Department; this email would send only auto-response messages, not Agent responses.

Alerts and Notices: Select the recipients of configured **Alerts & Notices.**

EQUIPMENT TAB

New Equipment Family

Admin Panel > Equipment

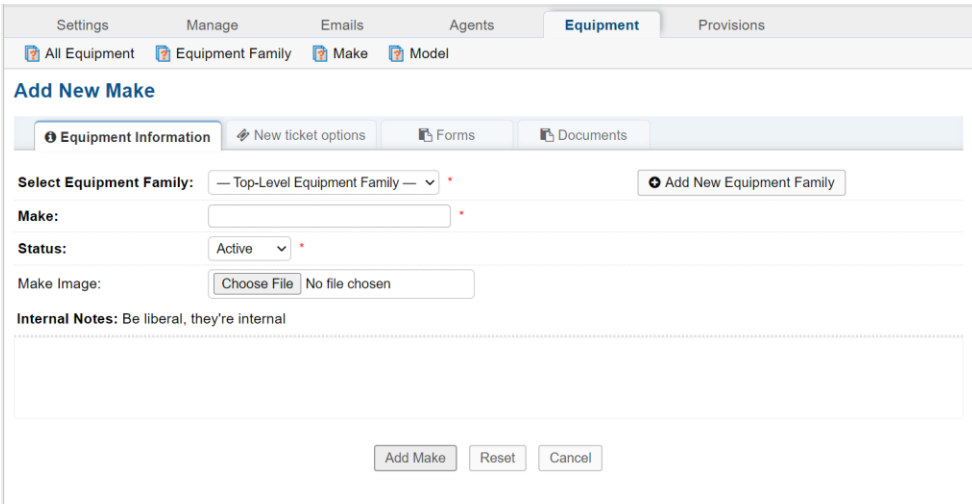
The section allows creation and categorization of various equipment's procured by a customer and provisioned internally for running the business operations. One can further associate an equipment with the ticketing options and relevant documents for seamlessly raising specific tickets or accessing documents to troubleshoot.

Upon accessing Equipment tab, list of all the equipment with associated departments are displayed.

Adding equipment details even helps streamline your end-user's help desk experience to ensure proper assignment and prompt response to the ticket against a particular equipment. Create as many Equipment Types as needed being operated in your organization.

Add New Equipment Family

The first step of adding an equipment is to create a hierarchy in terms of make/model for proper categorization and identification.

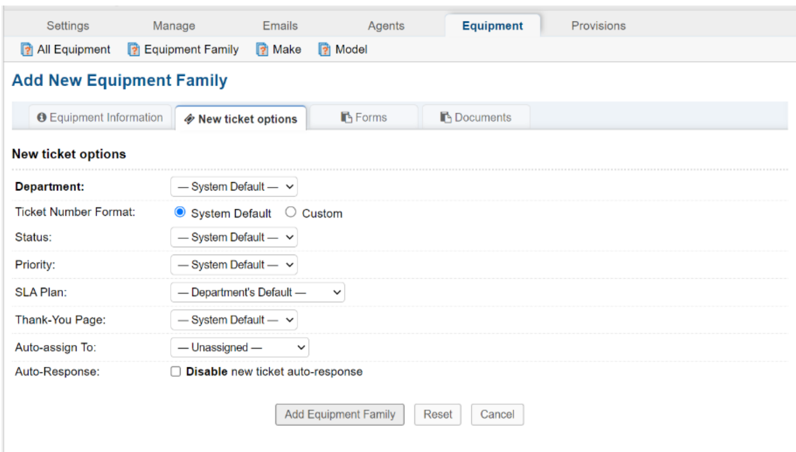


Equipment Information: Specify the **Equipment Family** which is the broadest category level for creating a list of equipment. If the equipment is operational and in use, select the **Status** as **Active**. You have other two options as **Disabled** and **Archived**. Upload the image for quick identification.

New Ticket Options:

Department: Since tickets are routed through Departments in the help desk, select the department from the drop-down list.

Ticket Number Format: This setting is used to generate ticket numbers. Use hash signs (#) where digits are to be placed. Any other text in the number format will be preserved. For example, for six-digit numbers, use ######.



Default Ticket Number Sequence: Choose between Random or Sequential numbers for tickets. To create new sequences, click on the Manage button to the far right of the field. The section is similar to creating tickets from **Settings > Tickets > Ticket Settings and Options**.

Default Status: Choose a status as the default for new tickets. This can be defined for each equipment, if desired. It can also be overridden by a ticket filter.

Default Priority: Choose between Low, Normal, High, and Emergency for all tickets not auto-assigned to priority based on the Equipment if set different than System Default.

SLA: Service Level Agreement for tickets routed to this Department. This the expected amount of time (in hours) that a ticket is expected to be closed once opened. If the ticket is not closed in the allotted amount of time, it will then be Overdue.

Thank you Page: The **Thank You** page appears once the end-user has created and submitted a ticket but is not logged into the client portal of the help desk.

Auto-assign To: Select the Agent or Team against that equipment such that whenever its ticket is raised, the ticket gets automatically assigned to the concerned team or person.

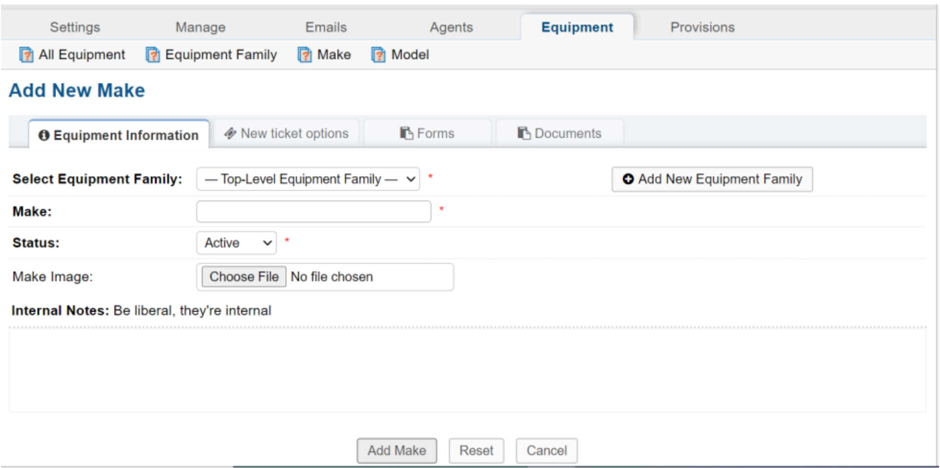
Auto-Response: Enable this if you do not want an autoresponse to be sent to the User on new ticket raised.

Forms: The form details related to a ticket such as Label, Type, Visibility and Variable are fetched and displayed from Manage > Forms which allows creating custom built-in forms.

Documents: The documents are associated for an equipment and displayed from the **Agents Panel > Documents > Document**. You can however view the related documents once **Product Family/ Make/ Model** are all created as a hierarchy or assigned as one.

Add New Make

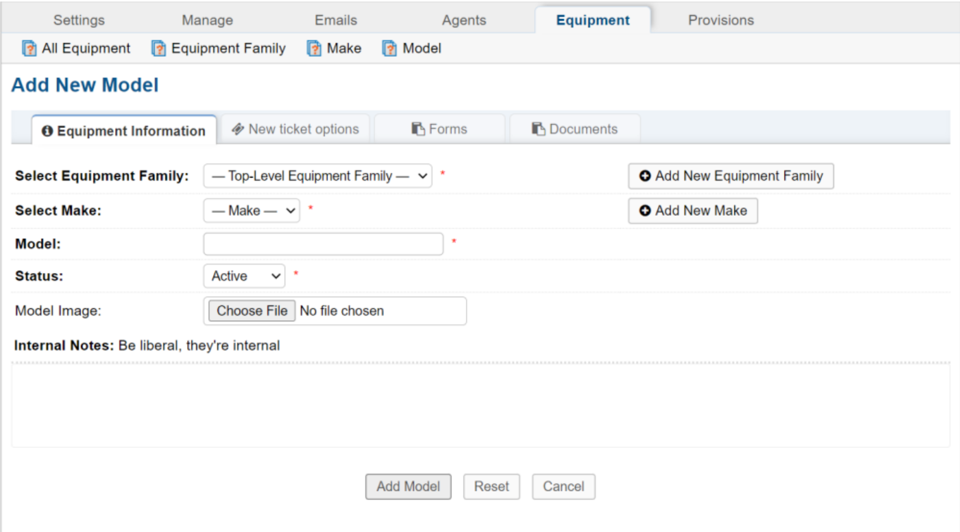
The next level in creating a hierarchy for categorizing an equipment is specifying the make of an equipment under the Equipment family.



Select first the **Equipment Family** created from the drop-down to specify the new **Make** under it. If the **Equipment Family** was not created earlier, you have the option of adding it now by clicking **Add New Equipment Family**.

Add New Model

Select the **Equipment Family** followed by **Make** from the drop-down or adding these freshly to specify a new **Model**. You can even upload a picture of the equipment model.

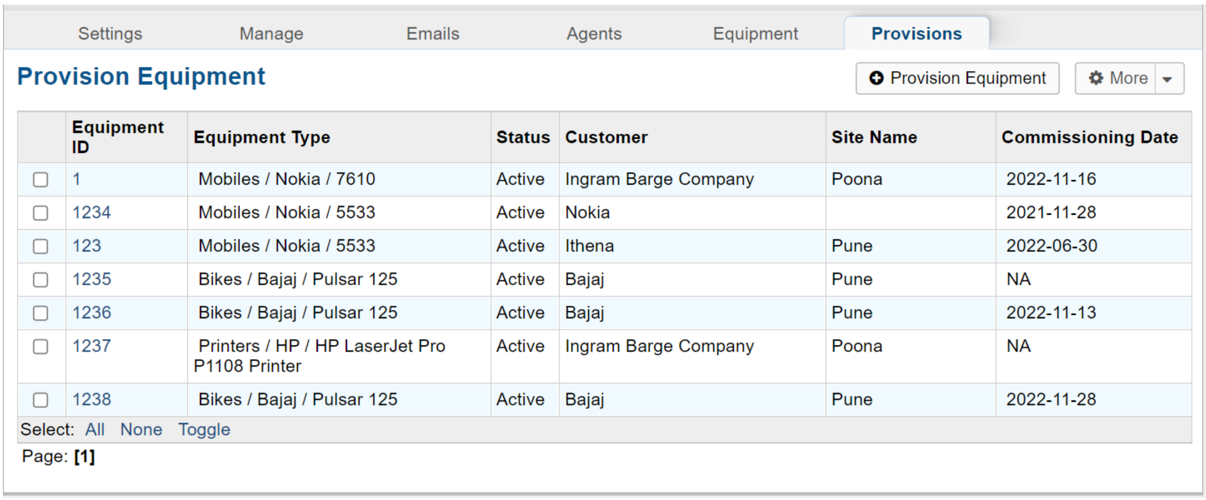


PROVISIONS TAB

Provision Equipment

Admin Panel > Provisions > Provision Equipment

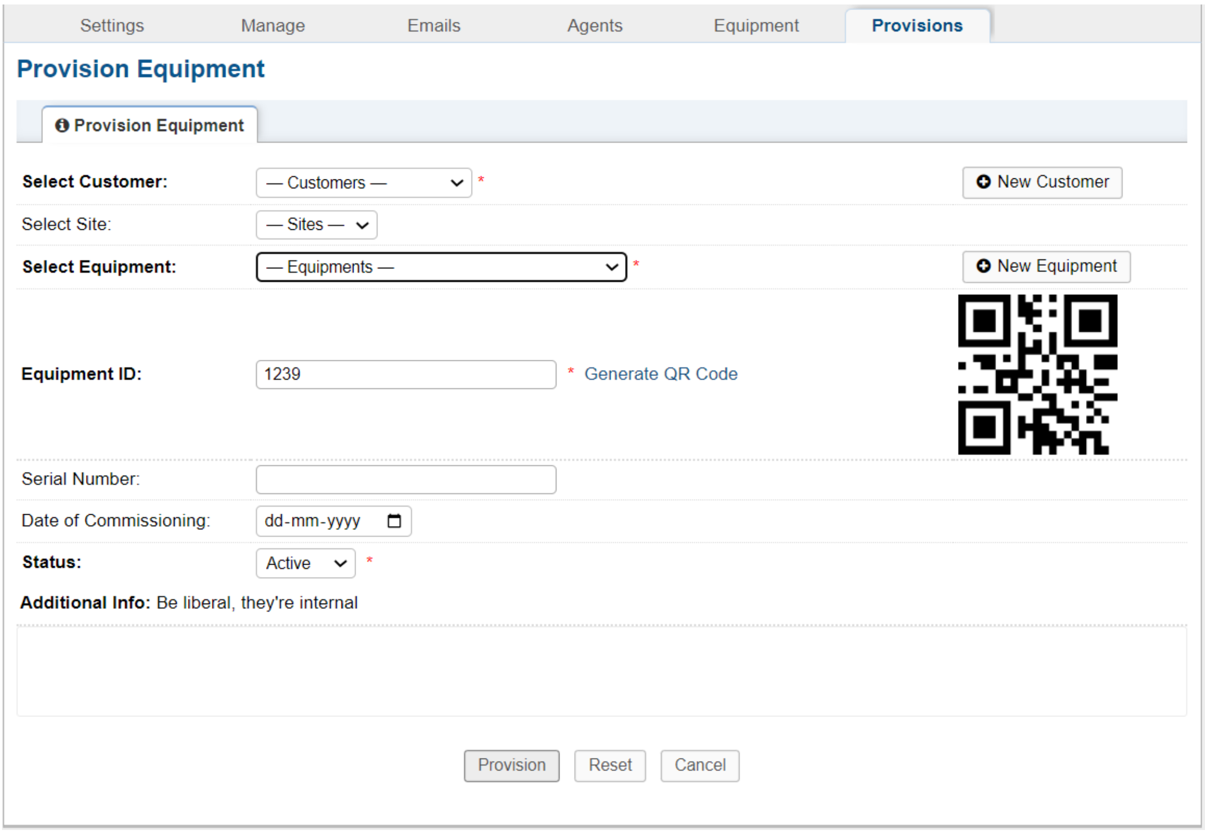
The equipment procured needs to be handed off to an end-user, or end-user team, for their specific use in a functional manner. Provisioning ensures that the right operators/users have right access to the necessary equipment and infrastructure. The application displays the list of equipment provisioned.



	Equipment ID	Equipment Type	Status	Customer	Site Name	Commissioning Date
☐	1	Mobiles / Nokia / 7610	Active	Ingram Barge Company	Poona	2022-11-16
☐	1234	Mobiles / Nokia / 5533	Active	Nokia		2021-11-28
☐	123	Mobiles / Nokia / 5533	Active	Ithena	Pune	2022-06-30
☐	1235	Bikes / Bajaj / Pulsar 125	Active	Bajaj	Pune	NA
☐	1236	Bikes / Bajaj / Pulsar 125	Active	Bajaj	Pune	2022-11-13
☐	1237	Printers / HP / HP LaserJet Pro P1108 Printer	Active	Ingram Barge Company	Poona	NA
☐	1238	Bikes / Bajaj / Pulsar 125	Active	Bajaj	Pune	2022-11-28

Select: All None Toggle
Page: [1]

Click **Provision Equipment** to add relevant details for establishing relevant association. Customer and Site details are populated from **Agent Panel > Customers**.



Select Customer from the drop-down. If unavailable add a new customer and the window gets redirected to **Agent Panel > Customers**. Based on the Customer selected, Site details are available for selection as dropdown. These details are fetched from **Agent Panel > Customers > Sites tab**.

Select Equipment/Make/Model string combination from the drop-down list fetched from **Equipment** tab.

Equipment ID is automatically generated by the application which is editable and one can even specify the serial number if required here. Click **Generate QR Code** for updating the code with the relevant details and equipment ID.

As part of provisioning, iSERV provides the ability to generate equipment specific QR codes which can be printed. These can be printed as stickers/lables for the equipment which can be easily scanned via iSERV's mobile app for ticket generation and remote monitoring.

If the equipment has a **serial number**, specify the details.

The customer may also decide to keep a record of commissioning the equipment at their site location.

For equipment in operational status, select **Active**.

AGENT PANEL

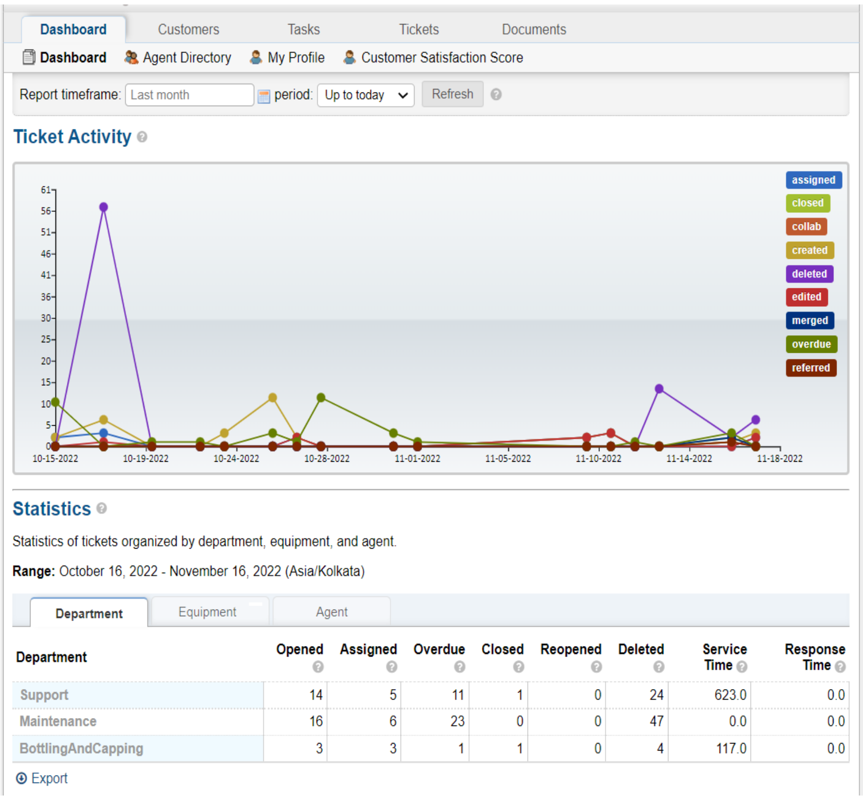
DASHBOARD TAB

Dashboard

Agent Panel > Dashboard > Dashboard

Meant to be a historical marker of the metadata in your help desk, the Dashboard will give you an overview of tickets in your help desk. The data can be filtered by date as well as Departments, Equipment, and Agents. This data can also be exported into a CSV file.

Choose a start date for the desired historical data to be retrieved for analysis using the date picker. Choose the length of time such as **Up to Today, One Week, Two Weeks, One Month, and One Quarter** from that date to define the end date for sampling the historical ticket data.



Opened

Tickets that were originally opened having the Department or Equipment on the ticket. When a ticket is created, one item will be added to Opened. For the Agents tab, the Opened column reports how many tickets an agent has manually opened on behalf of a User.

Assigned

Tickets that have been assigned to either an Agent or a Team while also being in the Department listed in the column, or tickets that were assigned to the Agent listed in the column, within the timeframe chosen. The number reflects tickets that are manually assigned to agents or teams, claimed tickets, tickets assigned from ticket filters, tickets assigned based on equipment, and tickets assigned based on user organizations. The number does not reflect tickets where an agent is automatically assigned to a ticket that they have responded to. Note that if the ticket was assigned to a Team, the report numbers for Agents will not change, even if they are in the team selected. Tickets can be auto-assigned to certain departments and/or agent based on your set up of emails and filters. Tickets can also be assigned internally to other agent/departments. The system tracks each time the ticket is assigned. The coloured circles signify the same as above.

Overdue
Tickets that have been marked 'Overdue' by the system while having the Department, Equipment, or Agent on the ticket as well, within the timeframe chosen. Tickets are marked Overdue when they have violated the SLA Plan to which they belonged, causing them to have a status of 'Open' past their Due Date

Closed
The number of Tickets in the Department that are currently in the Closed status while having the Department, Equipment, or Agent on that ticket, within the timeframe chosen. If the ticket is reopened, the number of closed tickets decreases by 1 and the number of Reopened tickets for the department increases by 1.

Tickets can be closed three ways:

A. Go to the ticket listing page, highlight the selected ticket by checking the box on the far left side of the screen. Once the ticket(s) are selected, scroll to the bottom of the page and click on the "close" button in the middle. A pop-up box will appear to ask about closing the selected tickets. Press "Yes" to continue to close the tickets.

B. A ticket can be closed when clicking on the ticket to view the contents of the ticket- this will not send a notification to the sender. At the top right of the ticket screen, there will be buttons including "close". When pressed, a dialogue box will pop-up asking for internal documentation of why the ticket is being closed. Although not required to close the ticket, it is highly recommended.

C. A ticket can also be closed under the "Post Internal Note" tab at the bottom of a ticket. In order to close a ticket in this manner, you must include an internal note then change the "Ticket Status" for that ticket to "closed."

Reopened
The total number of times a ticket was Reopened while having the Department, Equipment, or Agent listed for the ticket within the timeframe chosen. If a Closed Ticket's status is changed from Closed to Open, an item is added to Reopened and removed from Closed.

Tickets can be reopened in two ways:

A. A customer can respond to a ticket that agent has closed internally.

B. Select and click on a "closed" ticket > (scroll to the bottom of the ticket) > Post Internal Note > Change Ticket status.

Deleted
The amount of tickets that have been deleted while having the Department, Equipment, or Agent listed for the ticket within the timeframe chosen.

Service and Response Time calculate the values for the Departments, Equipment, or Agents based on what is currently on a ticket. These values are calculated in hours with decimals representing minutes. In order to convert the decimals to minutes, you should multiply the decimal by sixty.

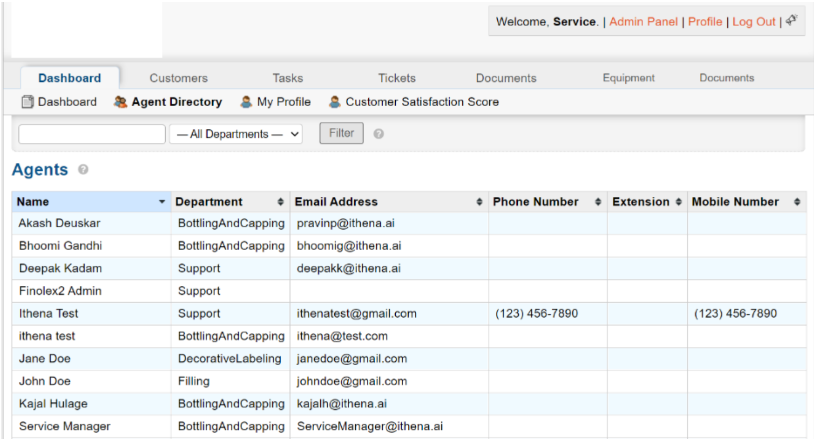
Service Time
Refers to the duration of time that begins at the opening of a ticket and ends when the ticket is

closed without being reopened again. The Service Time column measures the average Service Time per ticket, in hours, within the specified date span.

Response Time
Shows an average of the number of hours between when a user posted a message on a ticket and when an agent responded/replied to the customer.

Agent Directory

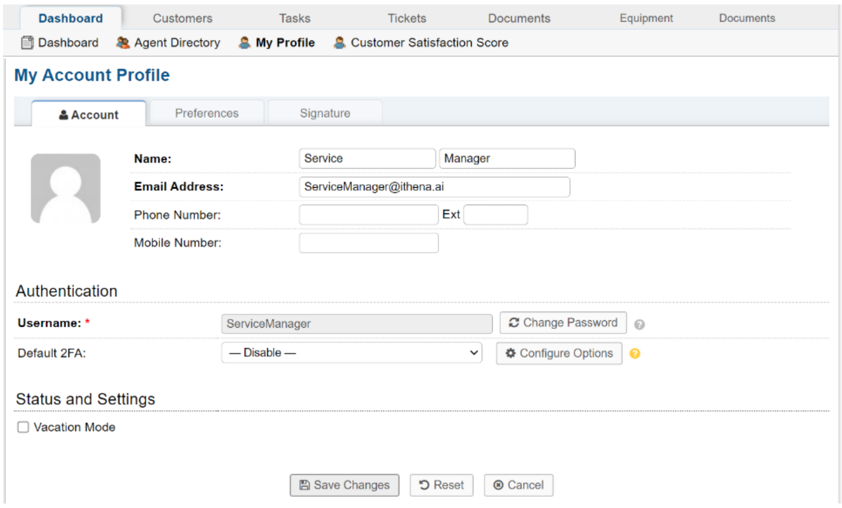
Agent Panel > Dashboard > Agent Directory



This is where to find all of the information about every Agent in the help desk.

My Profile

Agent Panel > Dashboard > My Profile



Account

General

Name: Agent's First and Last name.

Email Address: Agent's email address.

Phone Number: Phone number for Agent.

Extension: Phone number extension (if applicable)

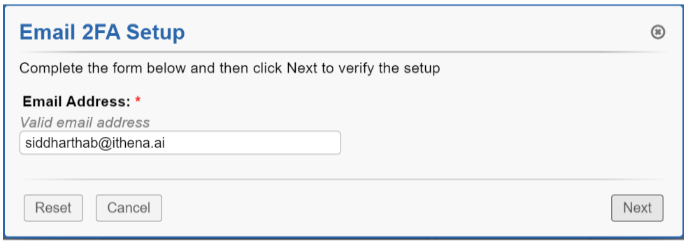
Mobile Number: Agent's Mobile phone number.

Authentication

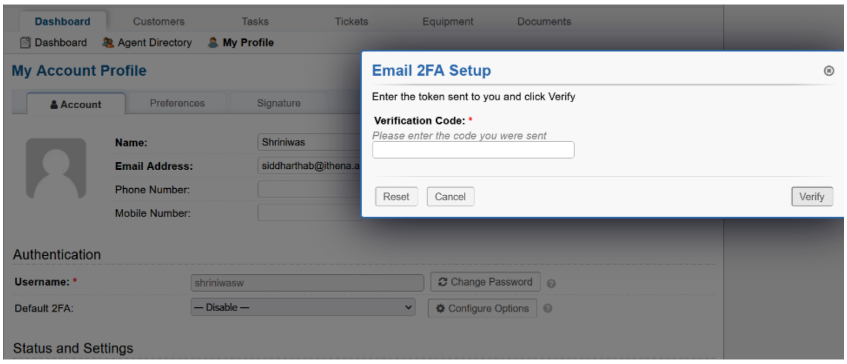
Username: Agent's username.

Default 2FA: Two Factor Authentication adds an extra layer of security when logging into the helpdesk. Once you correctly submit your username and password, you will need to enter a token to finish logging into the helpdesk.

Press **Configure Options**. To allow sending verification code over the email account as additional security, click **Email**.



The Agent's email address is displayed by default. Click **Next**. A pop-up message appears concerning the verification code.

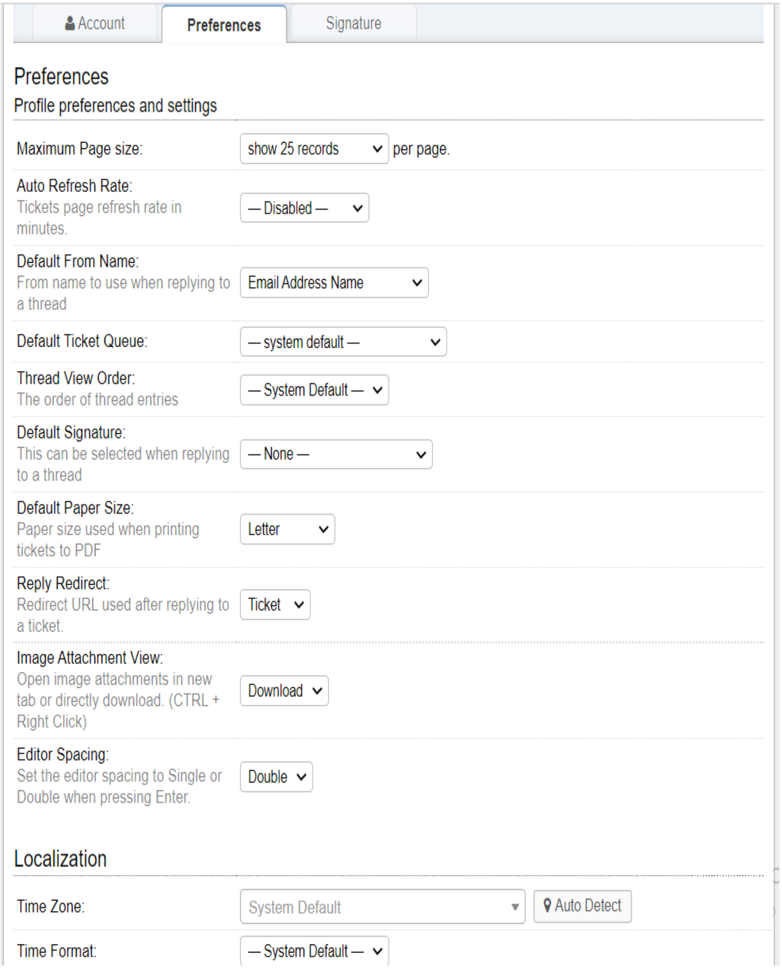


Status & Settings

Show assigned tickets on open queue: Shows assigned tickets on open queue.

Vacation Mode: Agent will not receive ticket notifications or emails until disabled.

Preferences



Profile Preferences & Settings

Maximum Page Size: Maximum number of tickets per page.

Auto Refresh Rate: Tickets page refresh rate in minutes.

Default from Name: From name to use when replying to a thread.

Thread View Order: The order of thread entries.

Default Signature: Default signature used when replying to a thread.

Default Paper Size: Paper size used when printing tickets to PDF.

Reply Redirect: This setting defines where the system will redirect you after posting a Reply on a ticket. There are two options, Queue and Ticket. If set to Queue the system will redirect you to the previous Ticket Queue you were viewing. If set to Ticket the system will redirect you back to the same ticket you posted a Reply on so you may continue working on it. The default value for this setting is Ticket.

Image Attachment View: Open image attachments in a new tab within your browser with Inline or directly download the attachment with the Download setting (CTRL + Right Click).

Editor Spacing: Set the editor spacing to Single or Double when pressing Enter.

Localization

Time Zone: The time zone for Agent.

Time Format: Time format preferred.

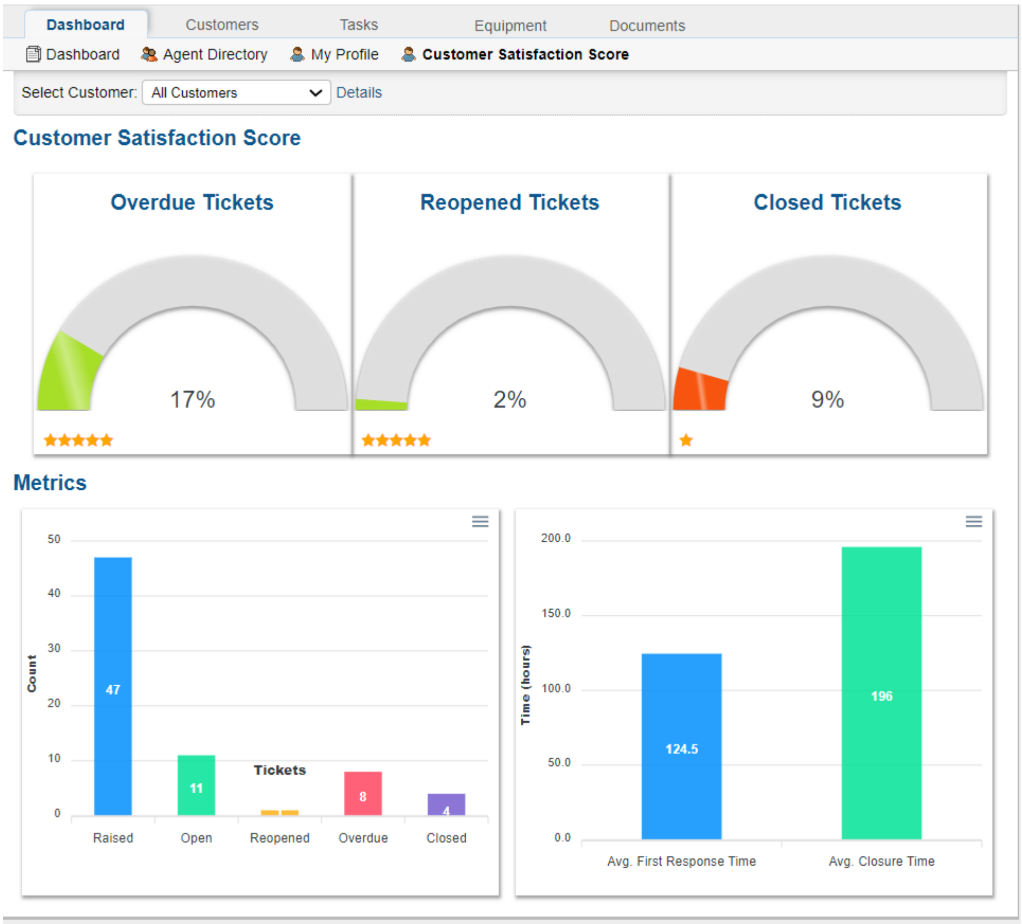
Preferred Locale: Language preference.

Signature

The signature for the Agent. Optional signature used on outgoing emails. Signature is made available as a choice, on ticket reply.

Customer Satisfaction Score

This gives a dashboard view or a bird's eye view of the number of unresolved/overdue tickets. One has to just select the Customer name from the drop-down list and the metrics are instantly updated.

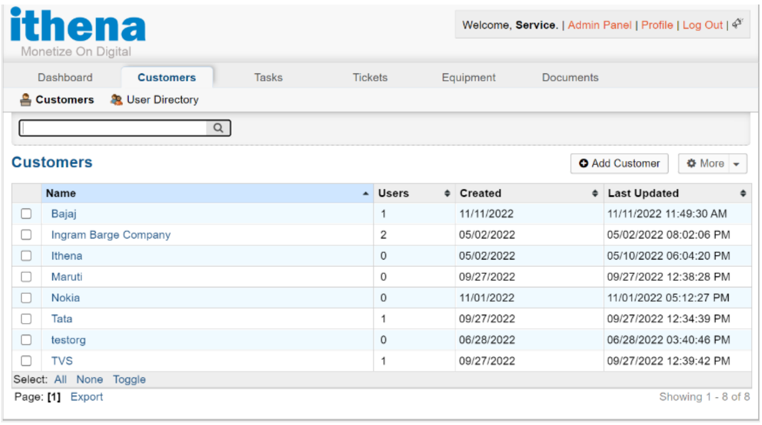


CUSTOMERS TAB

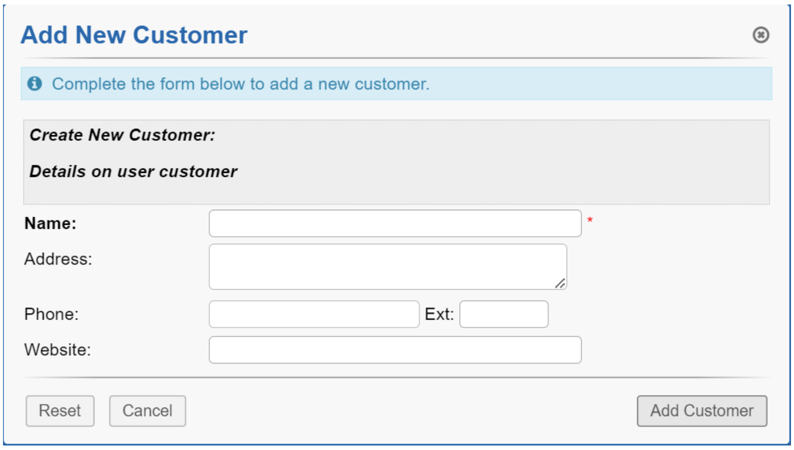
Customers

Agent Panel > Customers > Customers

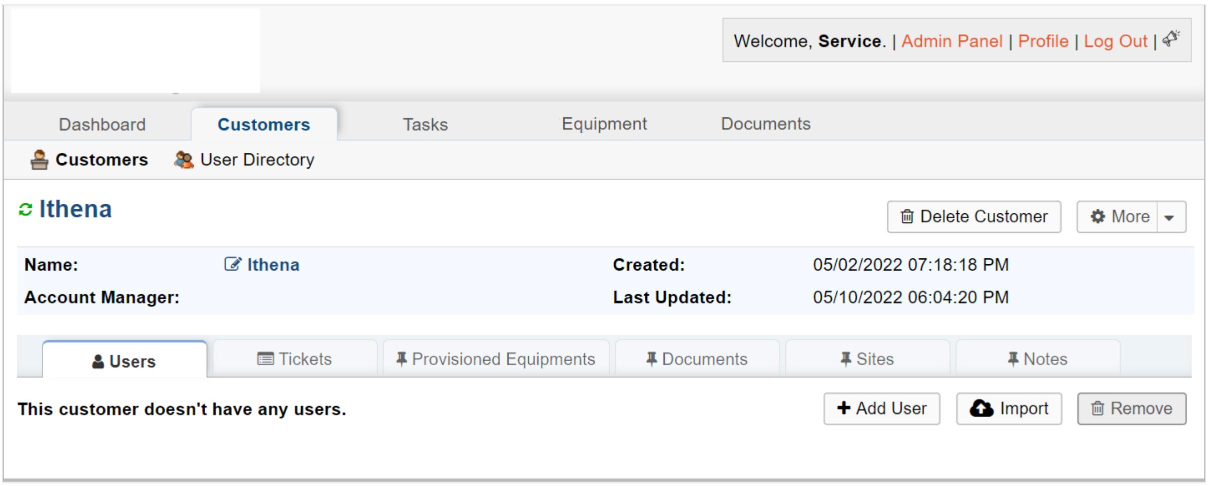
The screen initially displays a list of pre-existing customers.



One can add/create Customers by clicking Add Customer. To add a customer, click Add Customer at the top right.

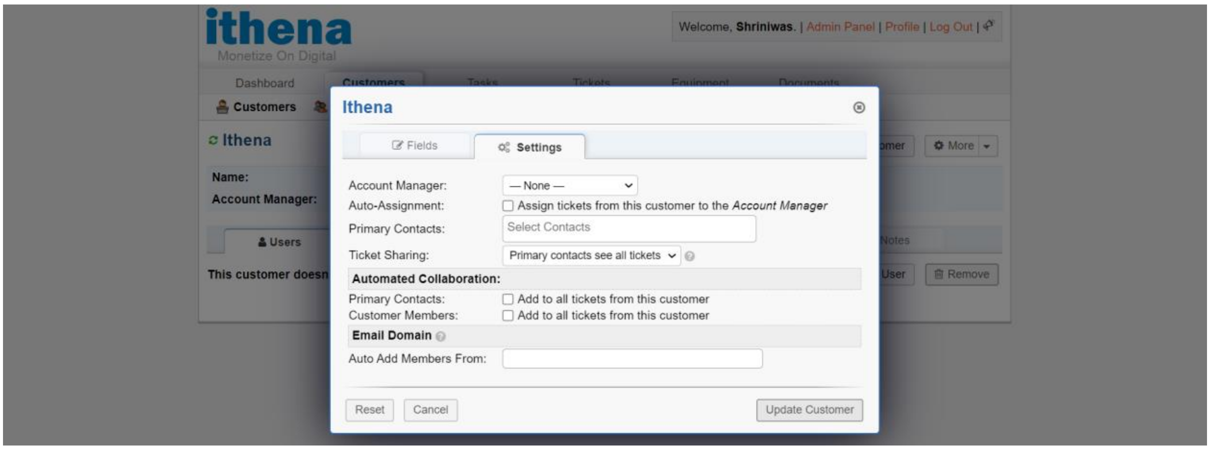


Clicking any of the customer name from the list opens a window displaying all the relevant information pertaining to it such as Users, Tickets raised, associated equipments and their documents and site locations for that customer organization. These details are obtained from other tabs wherever there was/is any information associated with that customer.



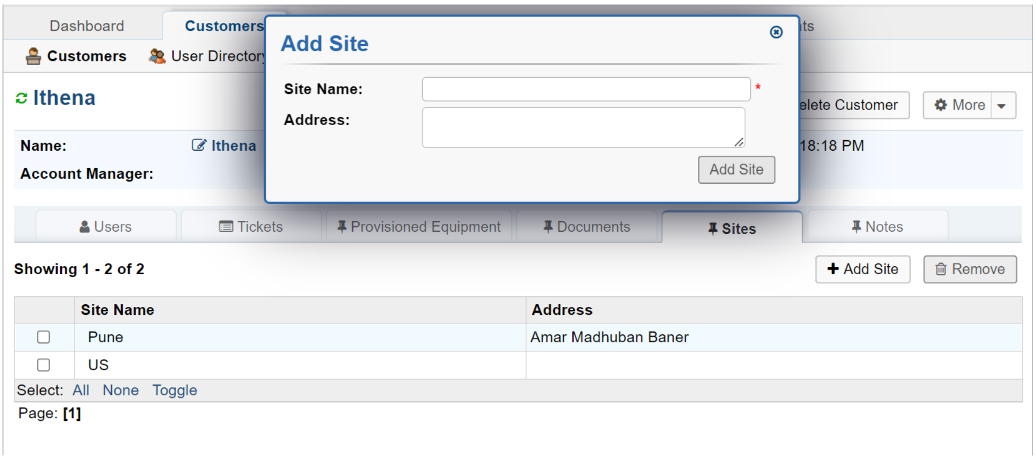
Click the Customer name. It opens a window which provides advanced settings options. Users (Customers) are not directly assigned directly to specific agents (staff). Customers are like a container where users are put in. Customers can have an **Account Manager** set (which would be an

Agent). Tickets can be auto-assigned to that Account manager. You can also set a Primary Contact (A user) in the Organization. You can also setup ticket sharing (Automated Collaboration) so all Users for the Customer can see / respond on the tickets or just the ticket opener and the Primary Contact. This capability allows having a certain team member/agent to be responsible for a single customer and have all tickets from that customer auto-assigned to the specific agent. Customer ticket sharing allows members access to tickets owned by other members of the customer using the option **All members see all tickets**.



Sites

Once a customer is created, revisit the customer details. Click the **Customer** name. Different tabs are available once the customer is added. Specify the site details as to where the customer/equipment locations are present. Site details specified here are reflected in **Admin Panel > Provisions** for equipment provisioning.



User Directory

Users can be added to a Customer organization from the Users tab or from the specific user's profile by clicking "Add Organization" on the header from User Directory.

Once the Users are in the Customer, specific users of that customer can be delegated as primary contacts and selected to be auto-collaborated to all ticket open by users of that organization. If configured, these users will be added to any ticket created by users of that organization allowing them access to view these tickets from the client portal.

These settings can be found by clicking on the Customer name with the square and pencil next to it.

Customers as Organizations can be created to add/associate users in the help desk to the organization. Within the Customer Directory, the settings can be edited to add agents as Account Managers of the Customer which will allow them to be auto-assigned to all tickets created by users of that customer.

Primary Contacts can be selected from the Customer's users to enable them to be added as collaborators for all tickets created in association with the users of the organization. Users can also be select to auto-add all users from the organization to each ticket created by a user of the customer. The same rules apply for sharing tickets of the users of the customer.

Customers or Organizations are further located in the User Directory of the Agent Panel. Each ticket created in the help desk is associated to a user via their unique email address. Customers allow a way to manage users and associate them with one Customer in the help desk.

Users can create an account and log-in to create a ticket or check a ticket's status. Users or ticket creators are associated with their email address as the unique identifier of each user. The User Directory, located on the Agent Panel, allows agents to search tickets by user as well as create Customers to associate the user to. Agents can be configured as internal Account Managers for tickets created by users of a Customer.

User

Users are the ticket owners of the tickets in the help desk. When a ticket is created in the help desk, the user is associated with their email address in the User Directory of the help desk. Users can be added or deleted from the User Directory of the help desk at any time. Please note, if the user is deleted the tickets of the user must also be deleted.

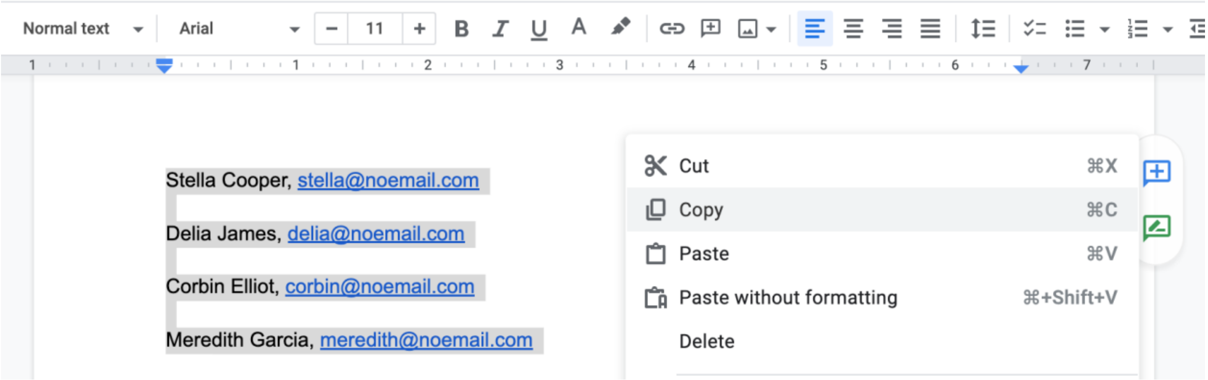
Add New Users

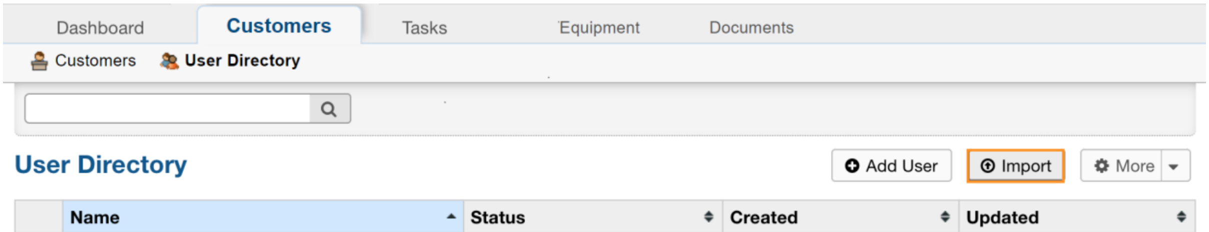
You can add users to the User Directory of the Agent Panel of the help desk either individually or by importing them by uploading a CSV file. If you are uploading, you will need to match the headers of the CSV to the fields in the Contact Information built-in form. Once you add the user, you can associate the User to a Customer of the help desk.

User Import via Copy/Paste

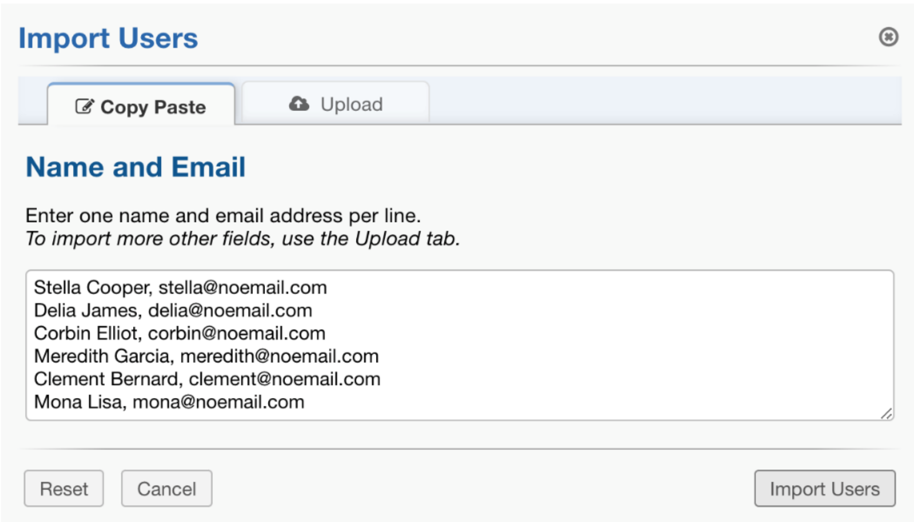
Importing a list via copy/paste allows you to easily import User's names and email addresses from a simple list.

Create a list of names and email addresses on any text editor. Separate each name and email address by comma, making a new line for each User.





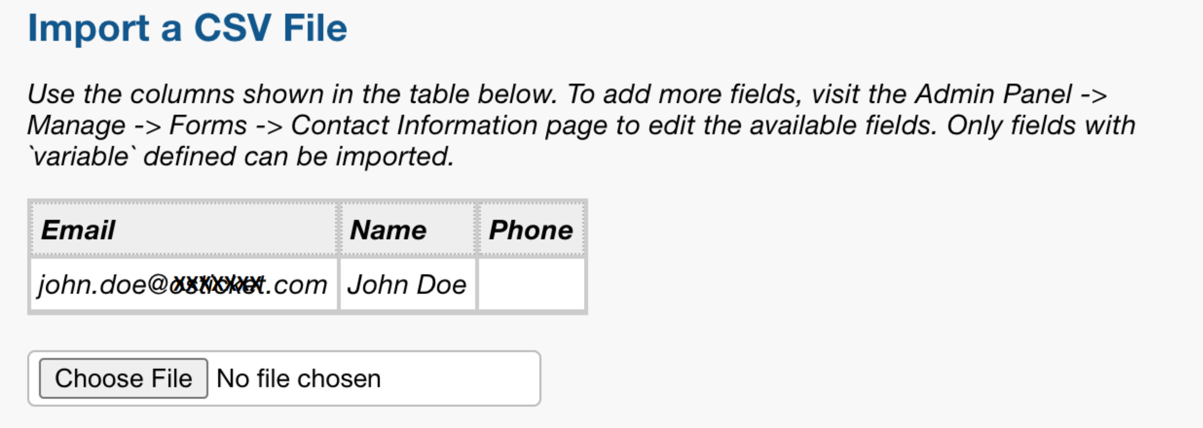
Paste list then select 'Import Users'.



User Import via CSV File

Importing Users via CSV file allows you to import User's names and email addresses as well as additional details if necessary.

Go to the User tab within Customers or User Directory and select 'Import' then 'Upload'.



Take note of the Column Headers listed here as your spreadsheet headers will need to match. You can customize these headers as well as add additional fields to import by editing the Contact Information form located at Admin Panel > Manage Tab > Forms.

Create a spreadsheet of names and addresses, as well as any other fields that you would like to import, matching the column headers to the ones shown here.

User Import

Email	Name	Phone
stella@noemail.com	Stella Cooper	763-555-7573
delia@noemail.com	Delia James	312-555-6377
corbin@noemail.com	Corbin Elliot	210-555-9776
meredith@noemail.com	Meredith Garcia	803-555-3982
clement@noemail.com	Clement Bernard	940-555-4197
mona@noemail.com	Mona Lisa	417-555-0722

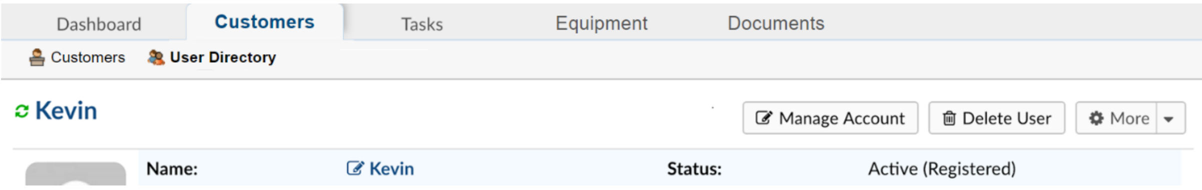
Once the spreadsheet is complete, export the document into a CSV file and import the file into iSERV at *Agent Panel* > *Users* > *Import* > *Upload Tab.*

Guest User Vs Registered User

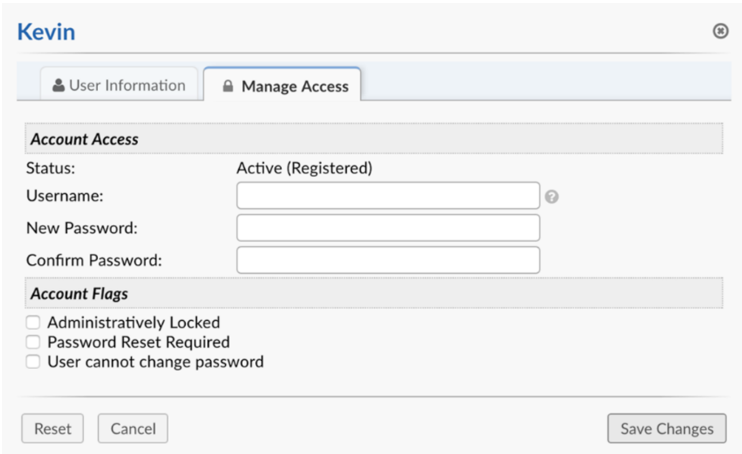
You can choose to have your users register prior to submitting a ticket to your help desk from your Client Portal from Agent Panel > Users > User Directory > More > Register. If a User is registered, this means they have created an account and verified their email. Once registered, they will be able to access all tickets they have in the help desk. Users can create their own User account or they can be added from the Agent Panel of the help desk. If added internally, the Agent will need to send the registration email for the User to verify their email address prior to becoming a registered user. Guest Users don't require registration to submit tickets.

Managing Registered Users

Once a user has activated their account with the help desk, Agents can administratively manage their access to the help desk; including requiring a password reset, locking them from the help desk, and even resetting their password. The User management feature is accessible by opening the configurations of that user and clicking the Manage Account quick button at the top right of the header.



A pop up box will appear; click on the Manage Account Access tab to configure these features.

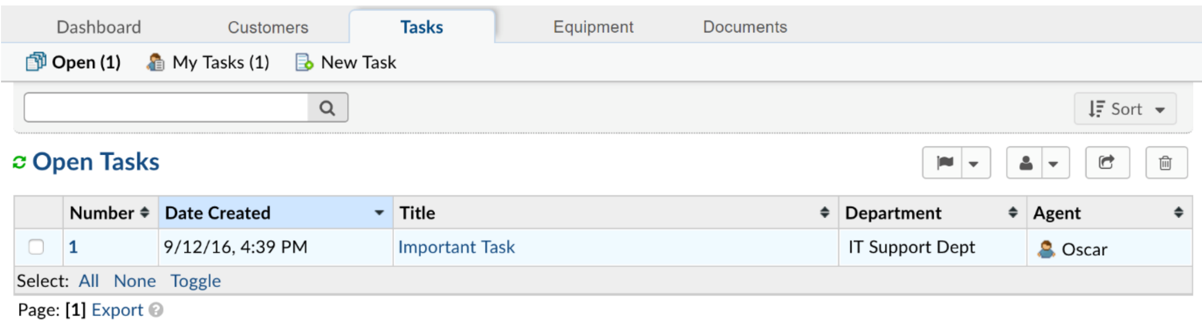


Reset a User’s Password

If necessary, administrators can manually reset a User’s password by going to their User Profile in the User Directory, then selecting the Manage Access Tab. Once manually set, an Agent will need to communicate the new password to the User allowing them to log-in; the User can be forced to reset the password upon logging in by keeping the box checked at the bottom left of the pop-up.

TASKS

Agents Panel > Tasks



Considered an internal to-do list of sorts, **tasks** are only visible to Agents of the help desk with access to the Department the task is assigned to. Tasks can be associated with Tickets of the help desk or created and assigned independent of Tickets.

If a task is created in association with a ticket, the ticket cannot be closed until all tasks are marked as complete. Tasks can be created in association with a ticket from the top of the Ticket thread; directly below the ticket header. An unlimited number of tasks can be created for the ticket and assigned to any department or agent of the help desk. Note: if the agent assigned to a task associated with a ticket does not have Department Access to the ticket's department, they will not see the thread of the ticket; only the ticket meta data and the task to which they are assigned.

Tasks that are dependent on a ticket as well as those independent of a ticket will appear in an agent's Task tab of the Agent Panel. Only those tasks assigned to the Department(s) the agent has access to will show in the agent's task tab. If the task is associated with a ticket, the task header will contain a linked reference to the ticket for the agent.

Fields required to create a task include the Task Summary, Task Detail, and the Department to which the task is assigned. Other optional fields when creating a task include the Assigned Agent or Due Date. Fields of the Task Form can be expanded in the Admin Panel > Manage > Forms > Task Details built-in form.

There are messages which can be enabled to alert agents of the events in a Task's lifecycle. These messages can be enabled in the Admin Panel > Settings > Tasks and include:

New Task Alert: Alert sent out to Agents when a new task is created.

New Activity Alert: Alert sent out to Agents when a new message is appended to an existing task.

Task Assignment Alert: Alert sent out to Agents on task assignment.

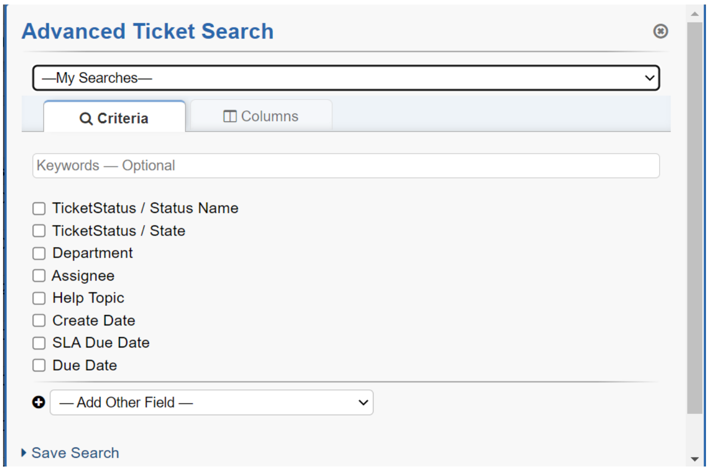
Task Transfer Alert: Alert sent out to Agents on task transfer between Departments.

Overdue Task Alert: Alert sent out to Agents when a task becomes overdue based on SLA or Due Date.

Third Party Collaborators can be added to Tasks by agents to receive updates on the tasks as posted by the Agents of the help desk. Collaborators will not have access to nor see the task when they login to the Client Portal; they will simply receive a New Activity Notice with the updates posted. If the Collaborator responds to the Notice, this will thread back into the task in the help desk.

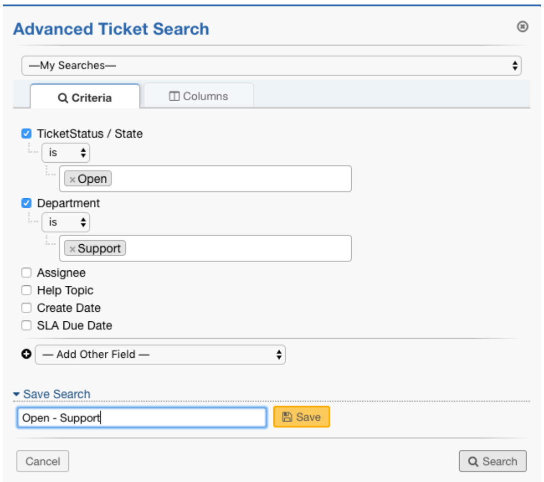
TICKETS TAB

Advanced Search

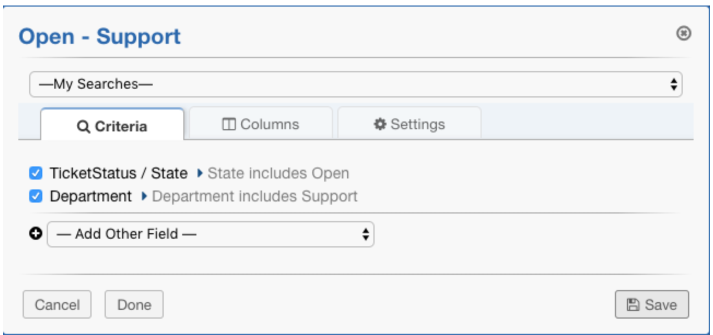


Click Advanced at the top of the table and the above search dialog pops up. Narrow down your search parameters.

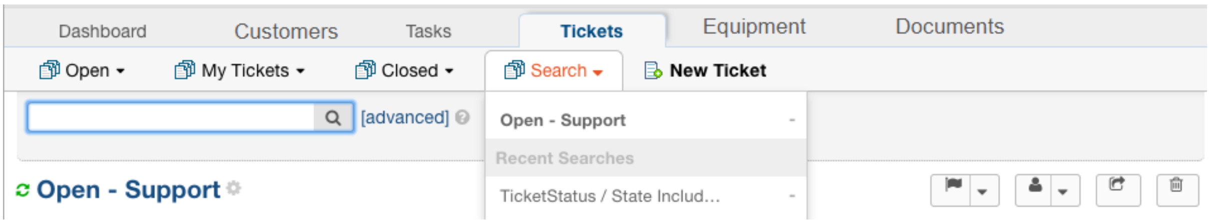
Saving a Search:



Once Saved:



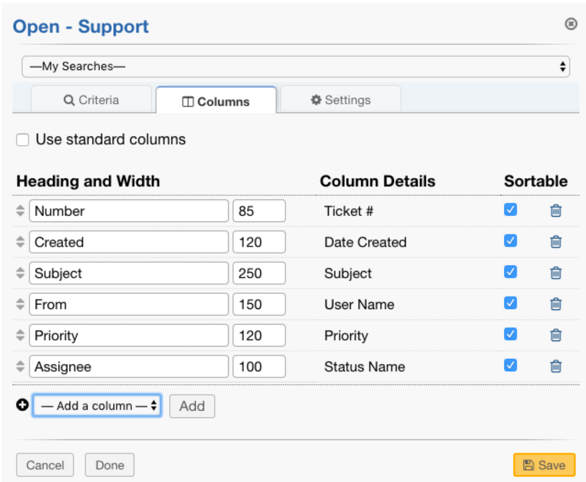
Saved searches are now displayed in the Search column with the title specified:



Agents have the option to customize the columns they see in a custom search as well as adding a quick filter to further narrow down the results shown.

Custom Columns

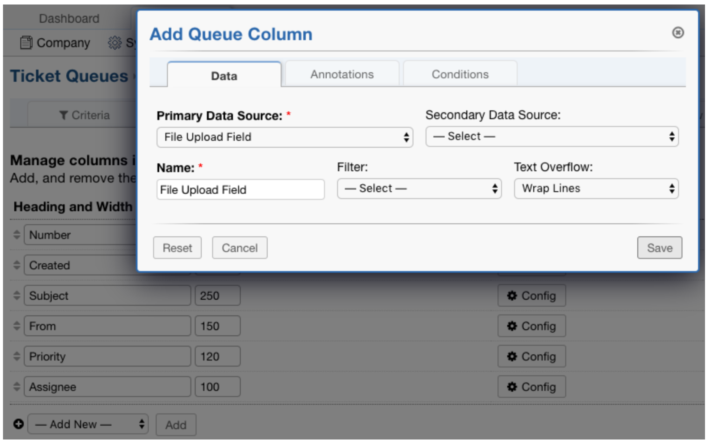
To customize columns, simply uncheck the ‘Use standard columns’ box:



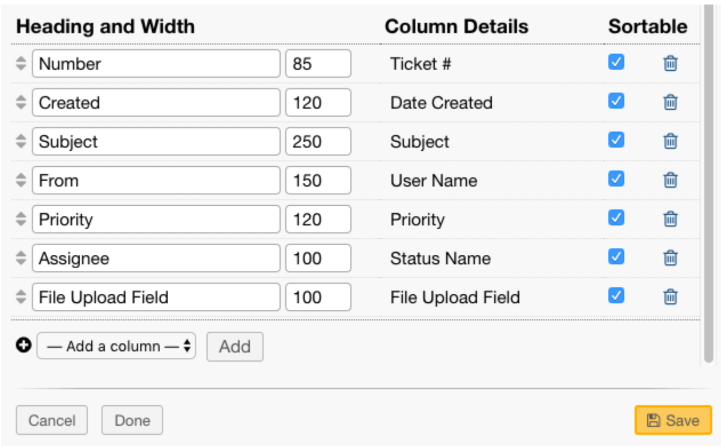
From here, agents can choose to customize headings for their columns, decide which fields should be sortable, and add/remove columns.

***Note:** The columns available to add to searches is configured by the Administrator for individual queues that are available to all Agents. The Administrator can add a field to the columns by going to a specific queue, clicking the Columns tab, and selecting the ‘Add New’ option to configure the new field.

Adding a custom field from Admin Panel:



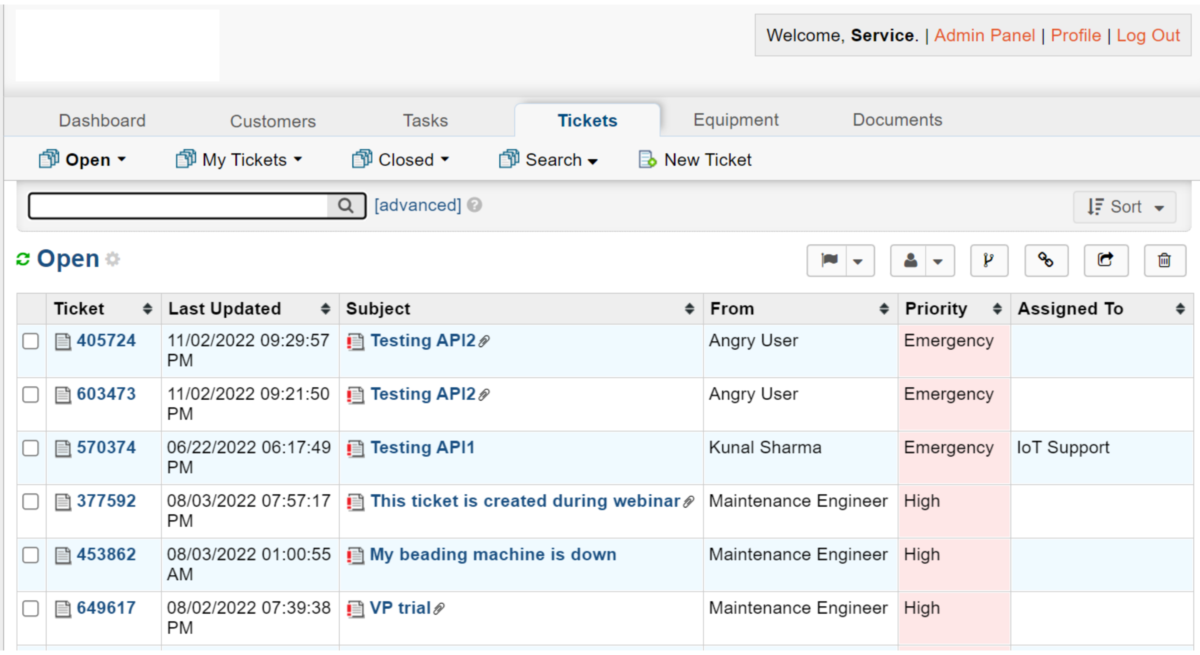
New Custom field in Saved Search columns:



Tickets

Agent Panel > Tickets

When an agent logs in to the help desk, they will be automatically routed to the Open Ticket Queue.



These are tickets the Agent has access to, based on their Department and Group assignments as well as tickets that are assigned directly to them or a team they are included.

Tickets are sorted first by the Priority Level and second by the Date- which is the date of last update. Each column of the queue is sortable but the default will return to the Priority/Date sorting each time they log-in.

There are 5 Queues along the sub-tab including:

Open: these are tickets Open in the Help Desk including both New Tickets and tickets that the end user is the last respondent on. These will have a BOLD ticket number to give the visual

Answered: These are tickets that have been responded to by Agents and are awaiting response back from the ticket owner. This queue can be collapsed into the Open ticket queue. Tickets that have been answered will not have a bold ticket number to visually represent the last action was by the Agent.

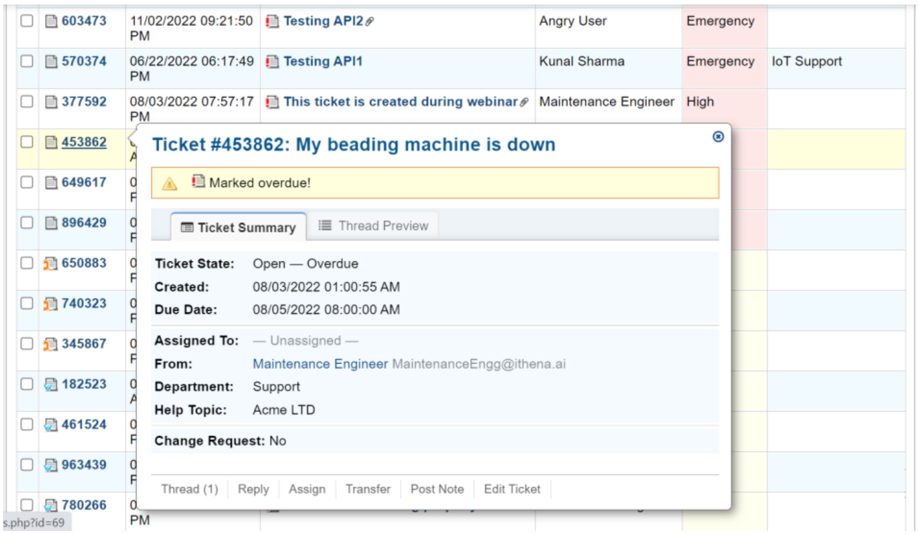
My Tickets: These are ticket that are assigned directly to the Agent or a team the Agent is assigned.

Overdue: These tickets have exceeded the assigned SLA Plan or Due Date assigned to the ticket. SLA Plans can be determined by the Department, Equipment or Ticket Filter configuration. Due Dates are manually assigned to tickets when an Agent creates a ticket from the client portal or when they edit an existing ticket.

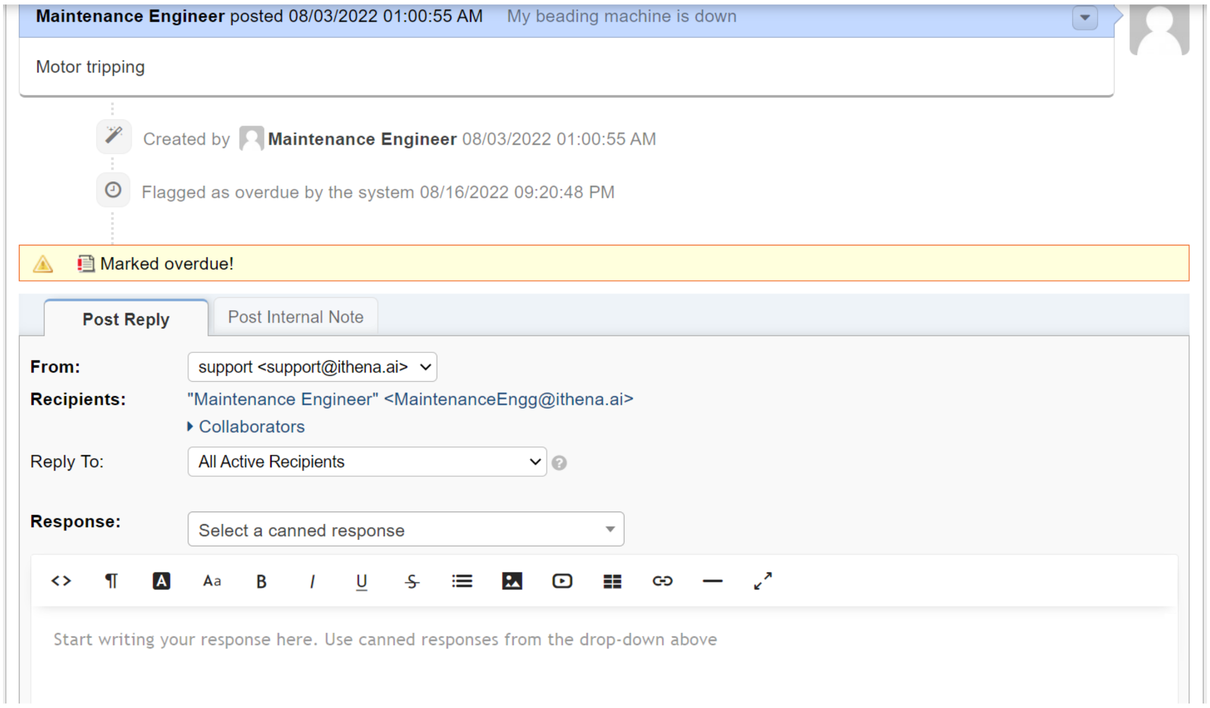
Closed: Tickets in this queue have been marked closed by the Agent either upon response to the end user or from the quick button of the ticket queue. Tickets that are marked closed can be reopened on response by the end user.

Tickets in these queues are not unique to each queue meaning that there may be some overlaps- For example, a ticket can be Answered and Overdue at the same time and therefore, will appear in both ticket queues.

Agents can preview the metadata of the ticket by hovering over the ticket number. A pop-up box will appear allowing the Agent access to actions along the bottom of the pop-up as well as access to the collaborators of the ticket.



Agents can open up the ticket by clicking on the Ticket Number or the Subject of the ticket. When an agent opens the ticket, the default will be to direct them to the Reply box at the bottom of the ticket.

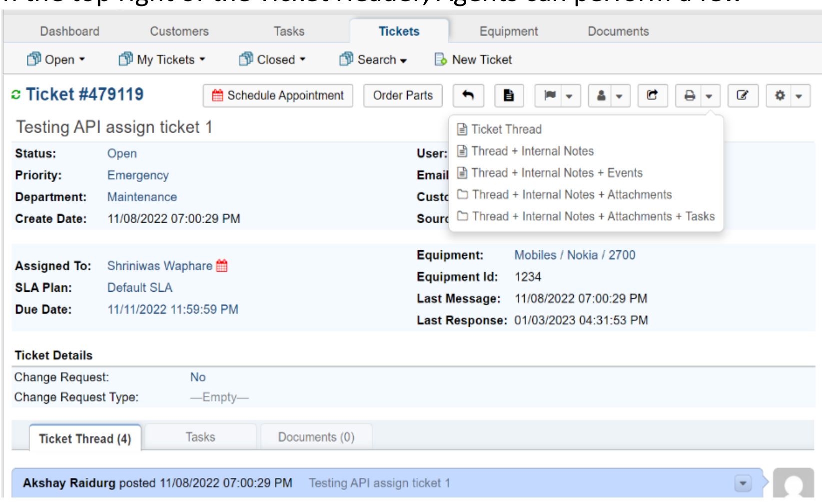


Based on their Role permissions, Agents can reply back to the end user by typing their response into the box- including adding attachments, links and embedding YouTube videos. Agents can select a canned response from the drop down in the reply box even if typing some of the response. All canned responses can also be edited by the Agents in the reply box prior to being sent. Collaborators can be added here to have access to the ticket. If necessary, the status of the ticket can be changed from the drop down prior to posting the response.

Ticket Header

From the top of the ticket or the Ticket Header, Agents will see any data associated with the ticket from the built in Ticket Details form as well as any custom form associated with the Equipment. One can order parts related to ticket raised by clicking **Order Parts** which directs it to the eCommerce website created having options to select items, adding them to the Cart with secure Checkout capabilities. You also get the facility of scheduling appointment.

From the quick action buttons on the top right of the Ticket Header, Agents can perform a few different actions if granted these permissions in their assigned Group.



Print: Allows Agents to print a specific Ticket or download it as a PDF. PDF Files will have File Icons and ZIP Archives will have Folder Icons.

Ticket Thread: Prints the entire Ticket Thread (excluding Internal Notes and Thread Events).

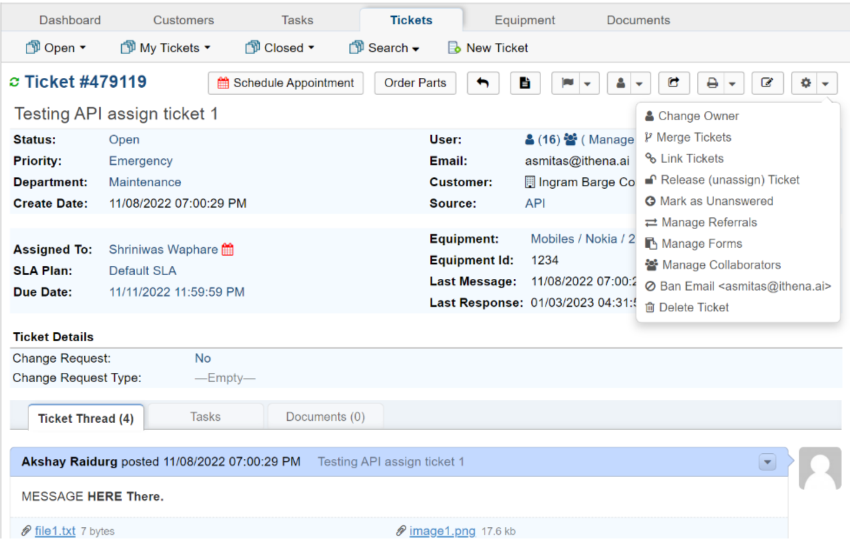
Thread + Internal Notes: Prints the entire Ticket Thread including Internal Notes (excluding Thread Events).

Thread + Internal Notes + Events: Prints the entire Ticket Thread including Internal Notes and Thread Events.

Edit: This action allows agents to edit the fields of the ticket- including any custom forms that are added to the ticket once it is created.

Change Status: Agents can change the status of the ticket with no response required. If changed, a pop up box will appear allowing agents to include notes with the status change.

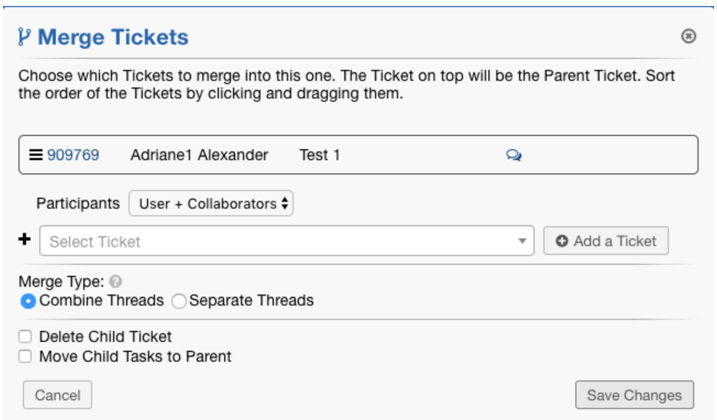
More: Depending on the Agent's Role permissions, they can see these functions.



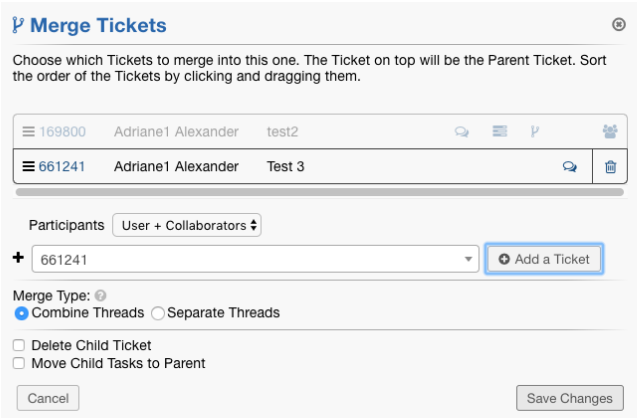
Change Owner: this allows the Agent to change the owner of the ticket. If the owner is changed, the previous owner will no longer have access to the ticket.

Merge Tickets: Merging allows you to combine two or more Tickets so that their threads will all be in one Ticket; We will call this the Parent Ticket.

Once clicked, the Agent will see the **Parent** Ticket, which is the Ticket they are currently in, as well as the options available when merging Tickets.



The first Ticket Number displayed in the list is the Parent Ticket. Moving a different Ticket to the top of the list will change the Parent to that Ticket.
Once a Ticket has been made a Parent, other Tickets can be merged to the Parent, however, the Parent Ticket can NOT be merged to any additional Tickets.



Merge Options

There are several different options that can be chosen when merging Tickets. We will outline the following below:
- Participants
- Merge Type
- Delete Child Ticket
- Move Child Tasks to Parent

Participants

The Participants dropdown allows you to choose how participants of child Tickets will carry over to the Parent Ticket. By default, this is set to 'User + Collaborators'.
This means that participants of the child Ticket will be added as Collaborators to the Parent Ticket if they are not already participants of the Parent Ticket.
If the 'User' option is chosen, the User of Child Tickets will be added as Collaborators to the Parent Ticket if they are not already the User or a Collaborator on the Parent Ticket.

Merge Type

There are 2 types of Merges:
1. Combine Threads
2. Separate Threads

Combine Threads: Threads from all Tickets will be displayed chronologically.

Separate Threads: Threads from Tickets will be displayed one Ticket at a time.

Link Tickets: Linking allows you to group tickets together without actually manipulating any Tickets; It gives you a quick way to access Tickets that may be related in some way.

Linking Tickets is similar to merging Tickets, however, linking Tickets does not actually combine thread entries. Linking Tickets simply adds a link to related

Tickets. The Tickets behave exactly as they did before with replies going to their respective Tickets. Linking can be done within a Ticket or from the Ticket queue.

Mark as Answered/Unanswered: This allows the Agent to mark the ticket as Answered or Unanswered (depending on its current state). The Agent has to have the Post Reply permission for the Ticket's Department in order to utilize this feature. When marking a ticket as Answered/Unanswered the Agent gets a popup to optionally put a reason why they marked it as such. If a reason is provided it will be added as an Internal Note with the title Ticket Marked (Un)Answered (depending on what it was marked as). Regardless of if they put a reason or not the system will always put a SYSTEM Note saying the ticket was flagged as (Un)Answered by the Agent along with a timestamp.

Manage Forms: This will allow the agent to attach any Custom Forms of the help desk to the ticket. Fields of the form can be edited once added by clicking on the "Edit" quick button. The fields of the form will not show up on the ticket header until there is information in the fields. If enabled, either the Agent or the ticket owner can edit the fields of the added forms.

Forms currently on the ticket can be removed from the Manage Form quick button. Any data in the form fields will also be deleted.

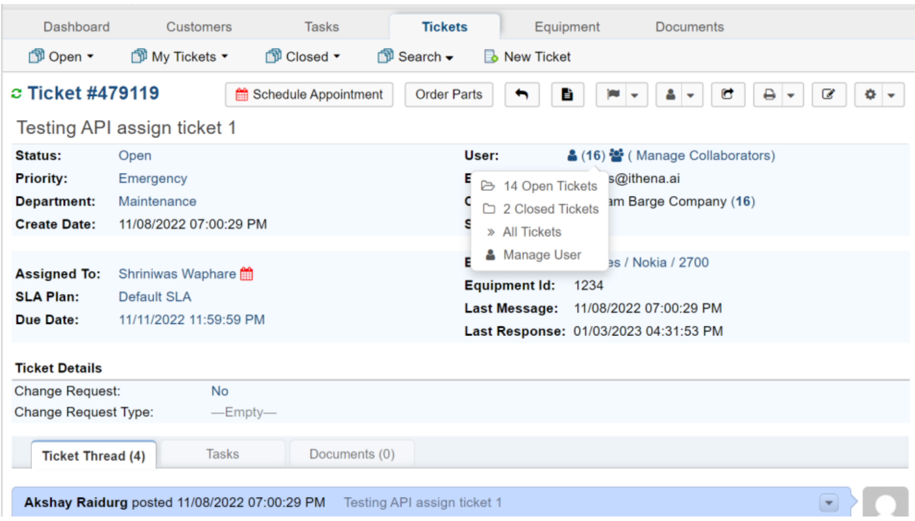
Ban Email: A email address can be ban from created tickets in the help desk by added them to the ban list. This action can be undone by the help desk administrator if necessary. Banning an email address will not delete tickets of that user; this action will have to be done separately if necessary.

Delete Ticket: When selected, a pop-up box will appear allowing the agent to give an optional reason for deletion. Once a ticket is deleted, it is not recoverable! If the agent types a reason in the pop-up box, that note will appear in the System Logs for the Administrator.

User Information on the Ticket Header

Information about the ticket owner can also be edited from the ticket header.

The number in parenthesis next to the User's name is the number of tickets they currently have in your help desk. If you click on the number - this will allow the agent a few options:



They will be able to view tickets of this user that are either Open or Closed in the help desk or the option of viewing both by clicking All Tickets.

If they click “Manage User” this will redirect them to the User’s profile in the User Directory. Same for if they click “Manage Customer”

If you click on the user’s name a pop up box will appear allowing you to edit their information as well as change the ticket owner of this ticket.

Any actions taken on the User or Collaborators as well as with in the ticket will be noted as an internal note in the Ticket Thread.

Ticket Thread

Each message of the ticket thread is colour coded to give the agents a visual representation of what the thread entry is and/or who performed the action.

Replies from the Ticket Owner or a Collaborator will appear with a Blue banner in the Ticket Thread.

Internal notes will appear with a light Yellow banner. They will also contain any actions taken within the Ticket (transfer, assignment, etc.).

Agent’s response back to the Ticket Owner or Collaborator will appear with an Orange Banner.

Any items in the Ticket Thread that are with the Blue or Orange banner are also visible to the Ticket Owner as well as any collaborators on the ticket when they check the ticket status from the Client Portal of the help desk.

Personal Queues

Custom Queue

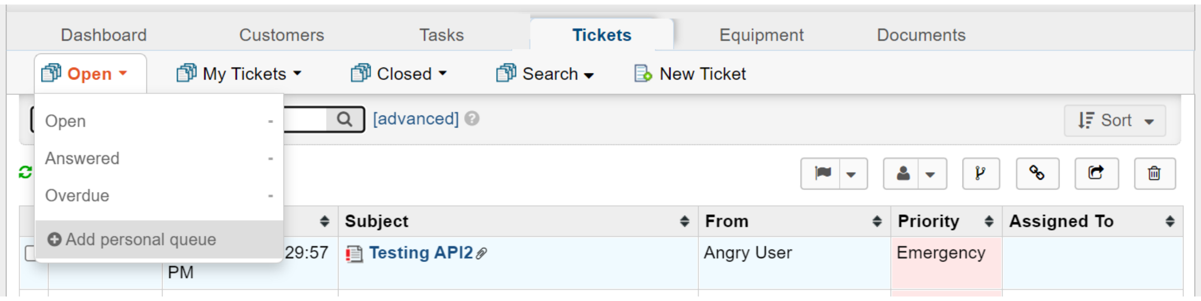
A custom queue is a view of tickets based on a custom criterion that you specify. It allows you to create your own personal views of tickets and specify what information you would like to see.

Custom Column

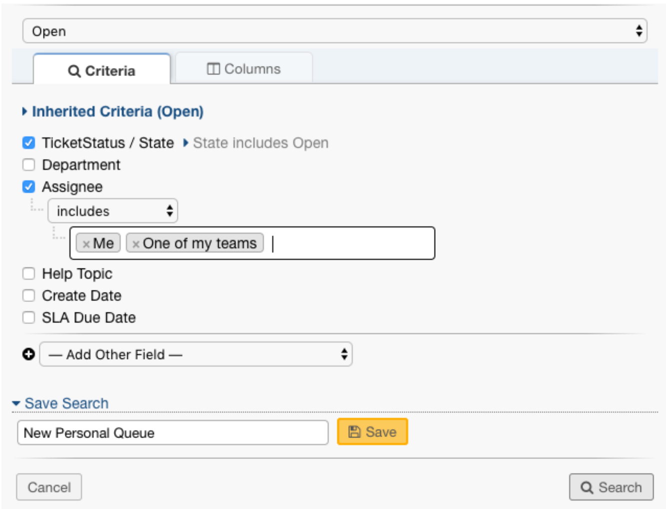
A custom column is an additional field that is not displayed initially when viewing the ticket tab. Using custom columns allows you to include these fields in the ticket list.

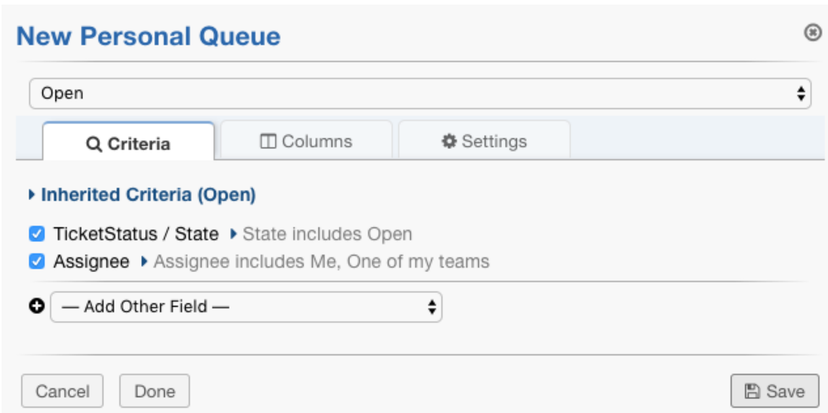
Create Personal Queues

Each tab has a drop down menu where you can select the option to ‘**Add Personal Queue**’.

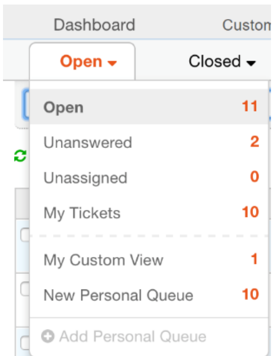


You are then prompted to specify what criteria of you would like to see in regards to tickets in your personal queue:





Once you have saved your changes, the new queue will appear in the list:

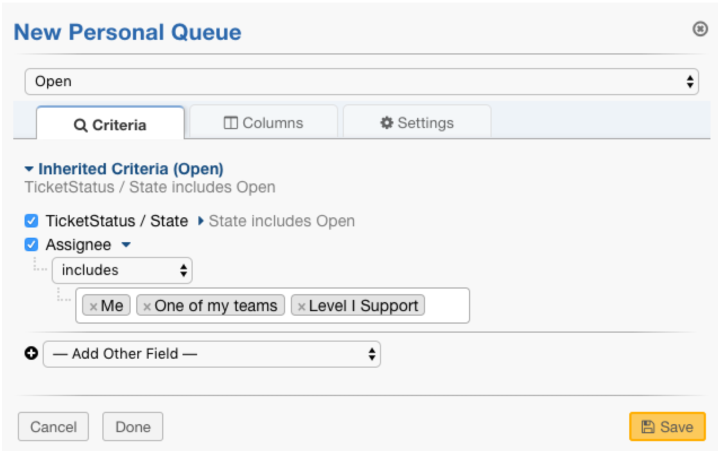


Note: Only you can see your personal queues.

Edit Personal Queues Created

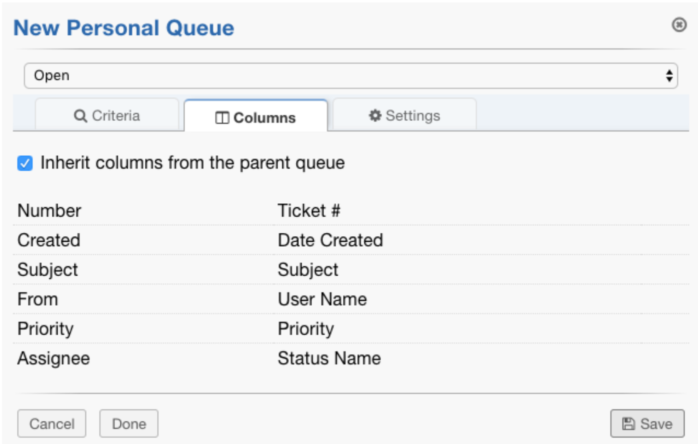
To edit your personal queues, simply go to the queue and click the settings button that appears beside the title and choose Edit.

From there, you are able to change the criteria options originally chosen:

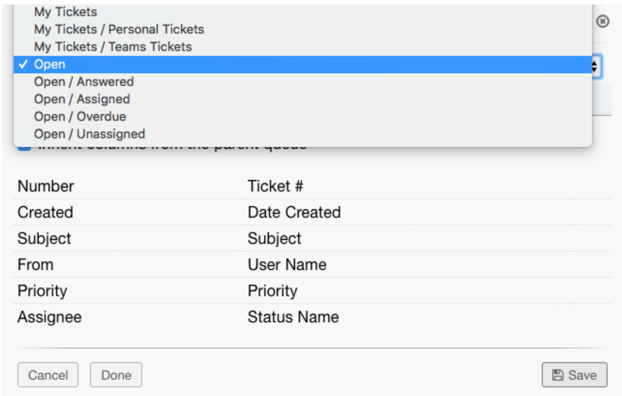


Add/Modify Columns to a Personal Queue

Within the same edit menu, select the 'Columns' tab:

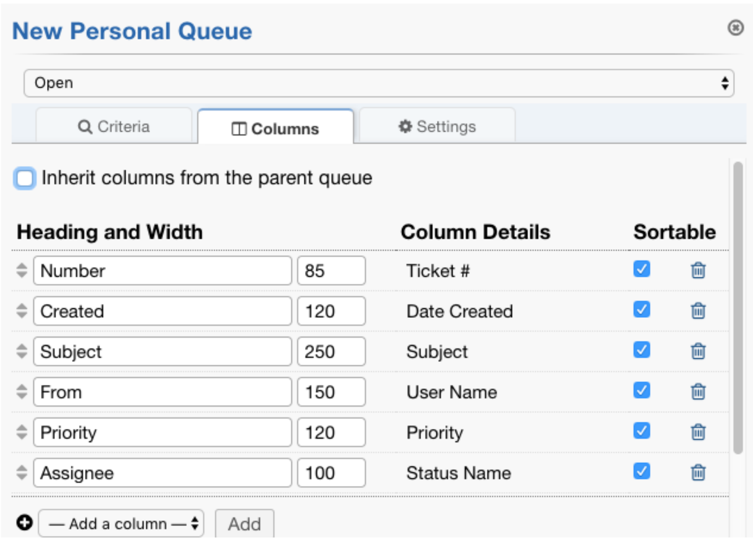


By default, columns will be inherited from the Parent queue which is 'Open' in this case. The parent queue can be changed using the dropdown box indicated with the arrow.



Once the ‘Inherit columns from the parent queue’ box is unchecked, more customizations can be made.

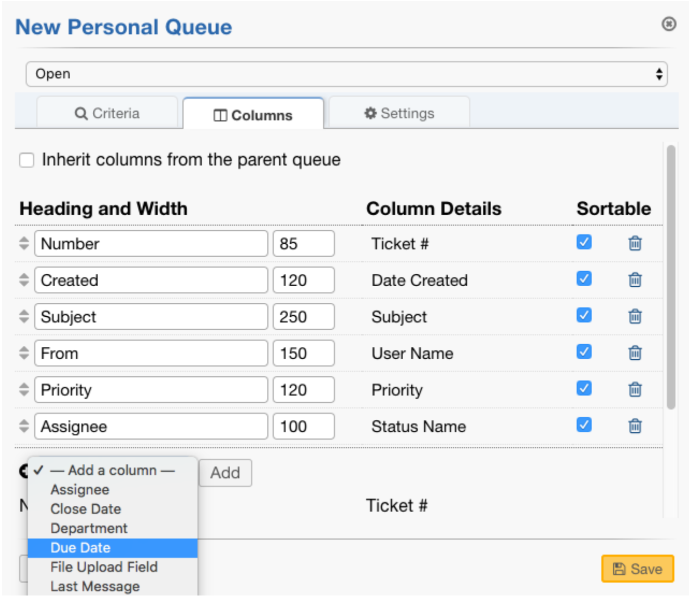
Here, you have the option to rename columns, modify their width, and remove columns. You can also rearrange the columns by dragging them by the double arrows to the far left.



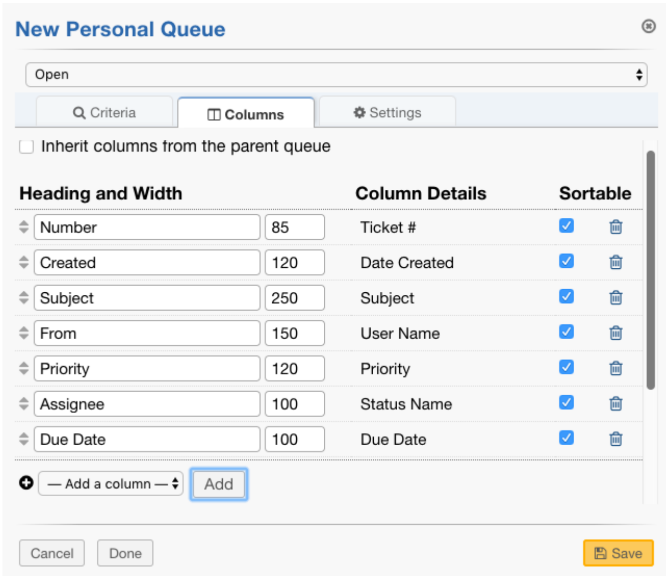
The sortable checkboxes make the column headings clickable. If you click the heading, tickets are sorted by that column.

Adding Columns to a Personal Queue

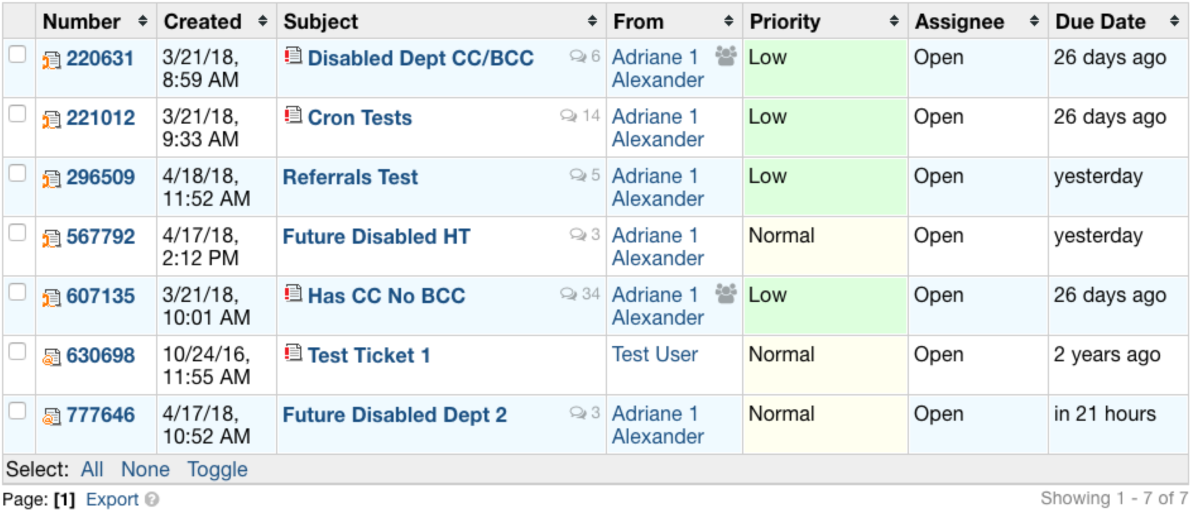
Click ‘Edit’ for your personal queue and go to the ‘Columns’ tab and scroll to the bottom of the window:



Click 'Add' and Save the changes.



Now the 'Due Date' field can be seen in the Personal Queue.



	Number	Created	Subject	From	Priority	Assignee	Due Date
	220631	3/21/18, 8:59 AM	Disabled Dept CC/BCC 6	Adriane 1 Alexander	Low	Open	26 days ago
	221012	3/21/18, 9:33 AM	Cron Tests 14	Adriane 1 Alexander	Low	Open	26 days ago
	296509	4/18/18, 11:52 AM	Referrals Test 5	Adriane 1 Alexander	Low	Open	yesterday
	567792	4/17/18, 2:12 PM	Future Disabled HT 3	Adriane 1 Alexander	Normal	Open	yesterday
	607135	3/21/18, 10:01 AM	Has CC No BCC 34	Adriane 1 Alexander	Low	Open	26 days ago
	630698	10/24/16, 11:55 AM	Test Ticket 1	Test User	Normal	Open	2 years ago
	777646	4/17/18, 10:52 AM	Future Disabled Dept 2 3	Adriane 1 Alexander	Normal	Open	in 21 hours

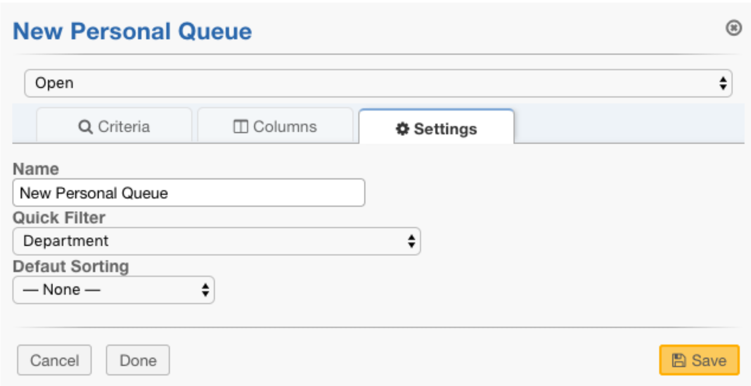
Select: All None Toggle

Page: [1] Export

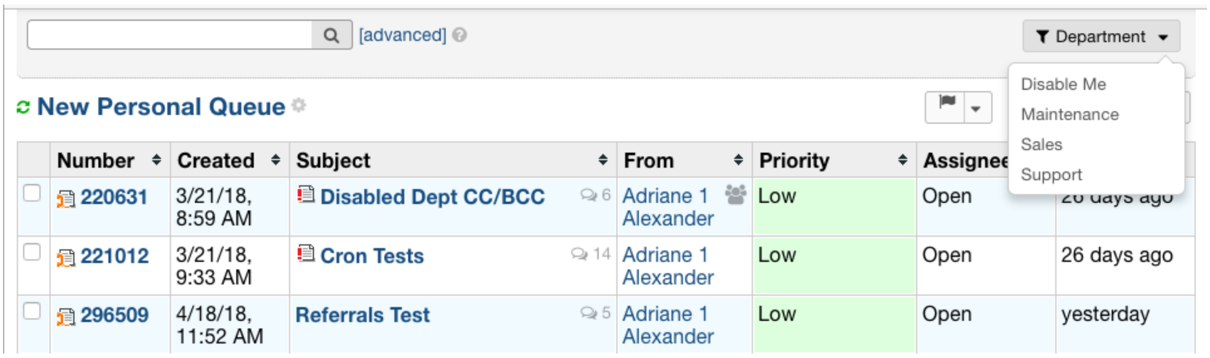
Showing 1 - 7 of 7

Adding Quick Filters

Quick Filters add an option to the top of the page to quickly filter by a specified field. Agents can add Quick Filters to Custom Queues by editing the Queue and going to the Settings tab.

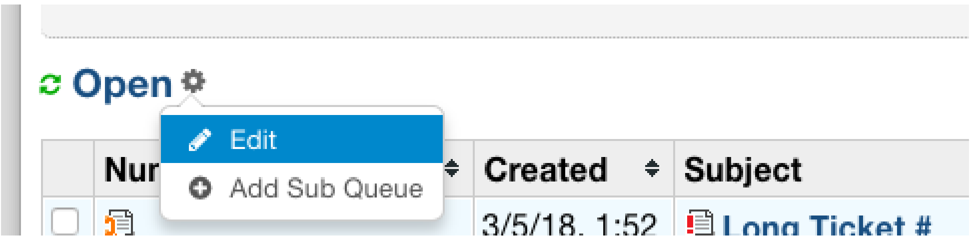


Once saved, an Agent can quickly filter tickets by the field of their choice.

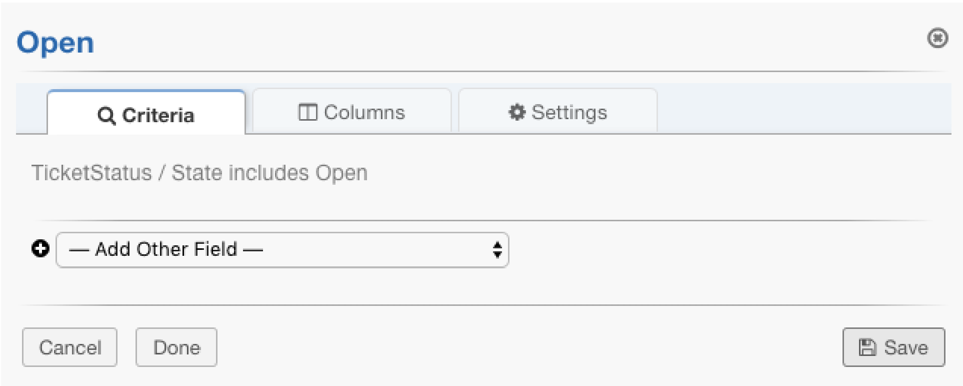


In addition to being able to create personal queues, Agents can also modify how existing queues show up specifically to them by editing the existing queues.

For example, editing the Open queue:

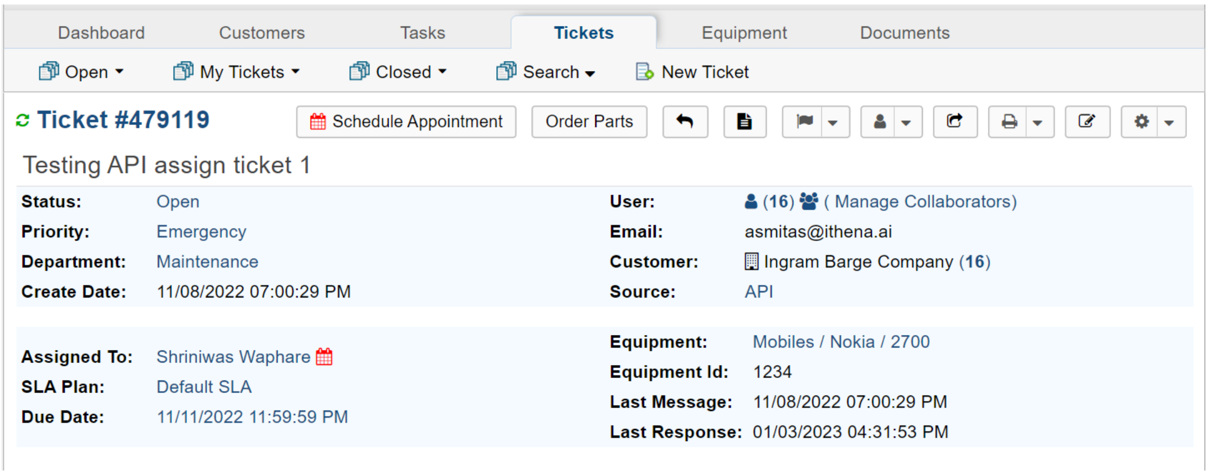


From here, Agents can customize existing queues in the same way they can customize their own personal queues.

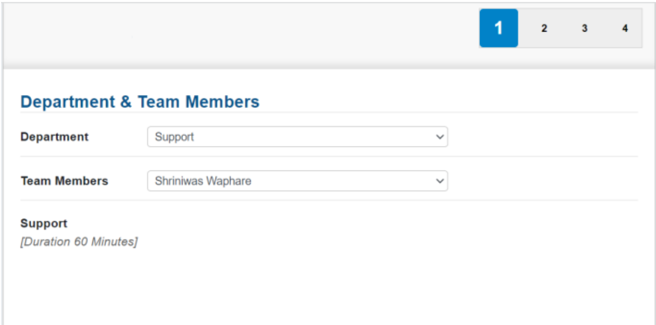


Schedule Appointment

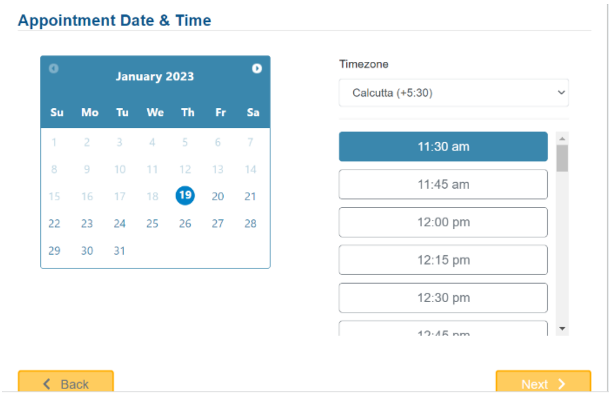
The application provides the ability for an agent to schedule an appointment for the raised ticket and assigned to him. The ticket header has the option to schedule an appointment. The section has **Assigned To** details as well indicating the agent who has been assigned the concerned ticket.



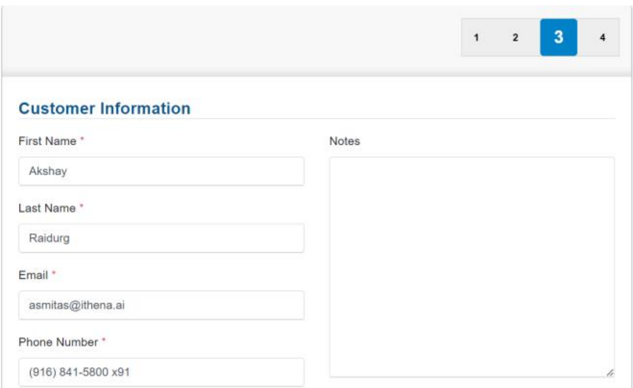
Press **Schedule Appointment**. A wizard window opens up for fixing the appointment for resolving the issue.



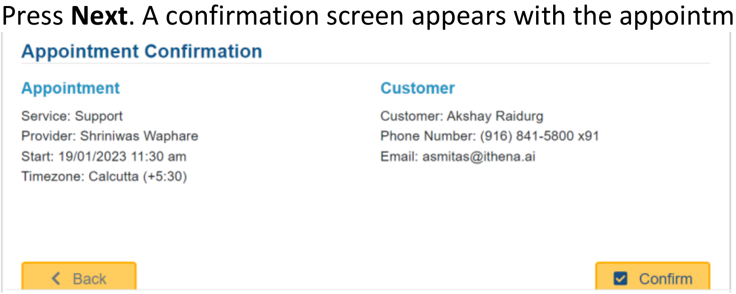
Press **Next**. Calendar appears with option to select a time slot 15 minutes apart. Time zone is automatically picked from the **Settings** tab within **Admin Panel**. Once the slot is booked, the next time, the selected slot shall not appear in the list for that day due to it being reserved.



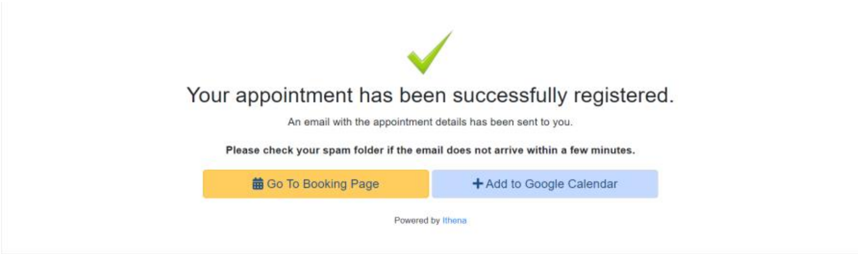
Press **Next**. Pre-filled customer details are displayed.



Press **Next**. A confirmation screen appears with the appointment/customer details.



Press **Confirm** and an email is sent.

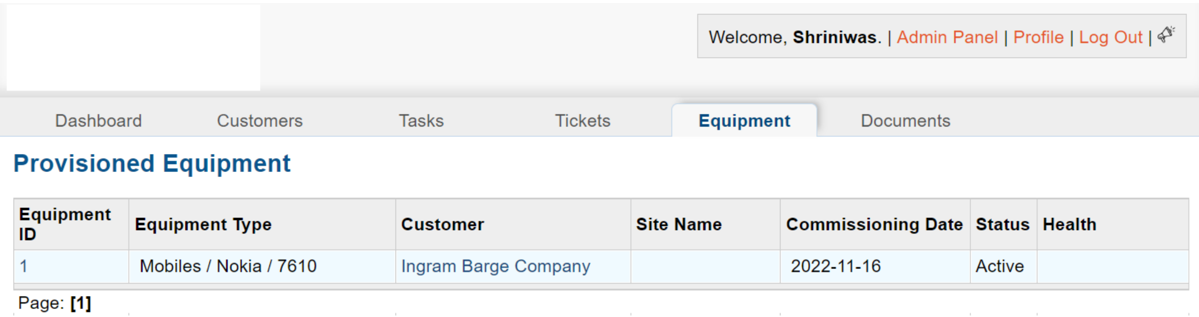


EQUIPMENT TAB

Provisioned Equipment

Agent Panel > Equipment

All the information related to an equipment created and specified in the Admin Panel are displayed here as a list.



Click under Equipment ID column to view equipment associated details. The Remote Monitoring section shows the threshold values for an equipment in real-time as part of performance monitoring.

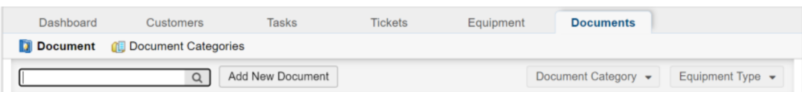
All the documents associated with the equipment are available as attachments in the **Documents** tab.

DOCUMENTS TAB

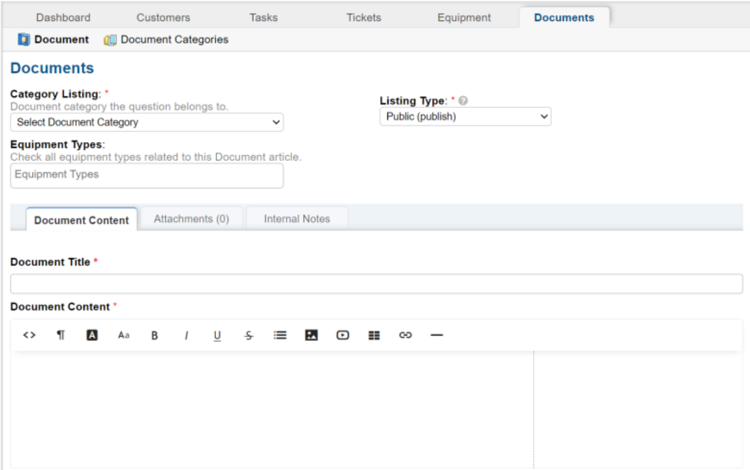
Document

Agent Panel > Documents

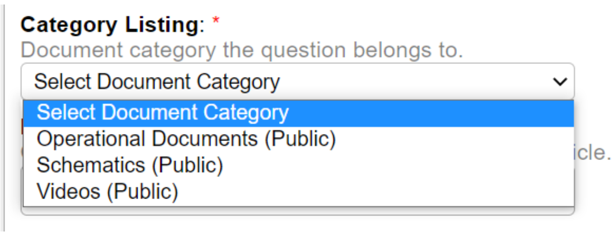
Press **Add New Document**.



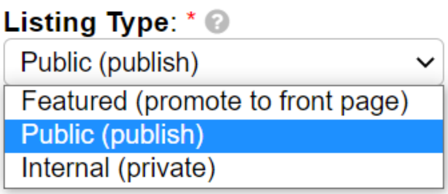
The screen provides the following options.



Category Listing: Select the document category created from the drop-down list. The list is populated from **Agent Panel > Documents > Document Categories**.



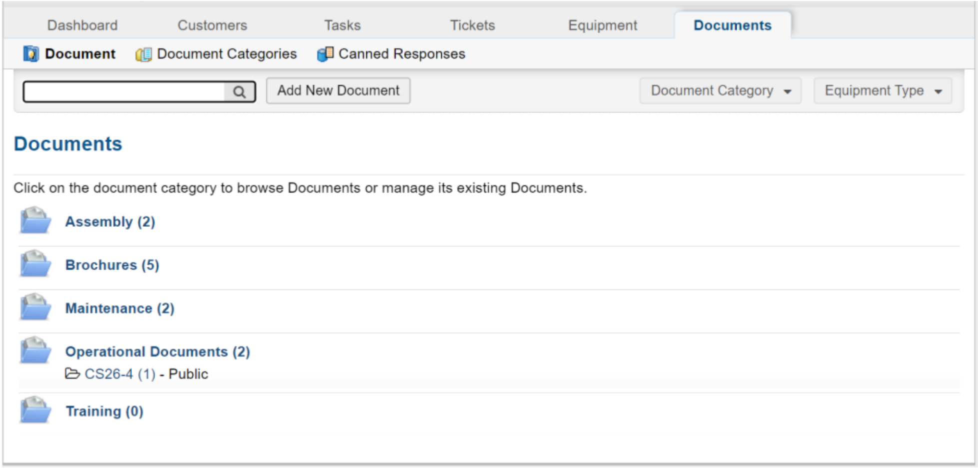
Select the **Listing Type**.



Select the equipment model + serial number string for associating the document. The drop-down list is populated from **Admin Panel > Equipment**. Add multiple such documents and associate with different equipment serial numbers.

Specify the **Document Content** for a quick glance on document particulars.

Switch to the **Attachments** tab. Upload the pdfs, .docx and other format documents pertaining to the selected equipment model + serial number using simple drag and drop functionality or navigating the folder/file. Similarly add other documents. All the documents are listed as a drop-down list after clicking the expand button preceding a document category.



Once created, all the document categories and equipment types are associated with the documents. A count is available and one can filter the documents for viewing purpose.

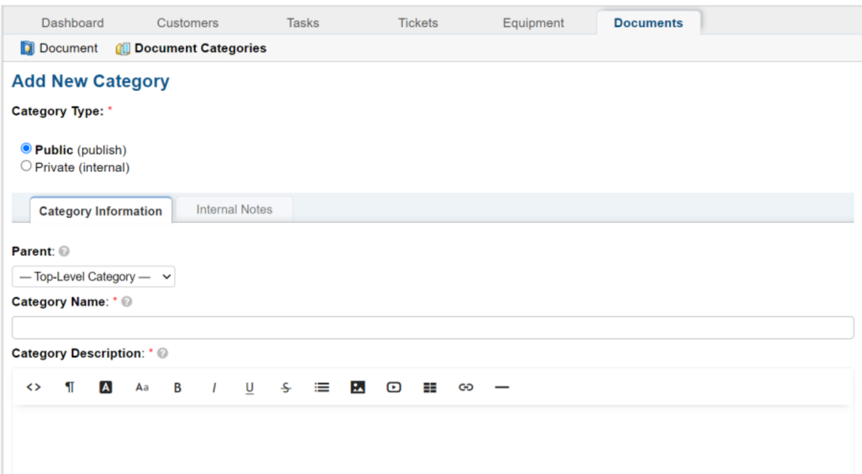
Add Document Category

An unlimited number of categories can be added to the Documents. These categories can be marked as private if it is for internal view only or public if it is to be visible on the Client Portal of the help desk. Please note, if it is to be visible for public use, the Category must be marked Public.

First, the Documents will need to be enabled for the client interface by going to Admin Panel > Settings > Documents.

Once enabled, the documents can be built by agents in the Agent Panel > Documents. To build the documents, the agent will have to first, add a Category. Within the Category you have the ability to nest Categories together. Nested Categories are listed together within the Documents.

Document Categories can have attachments, HTML/Rich Text and also be associated with specific Equipment of the Help Desk.



Add Canned Response

To create a canned response for quick answers to common questions or a specific phrasing of a response for agents, go to Agent Panel > Documents > Canned Response.

Canned responses can be open to all departments or limited to only one department. (The department availability is determined by the department the ticket is assigned to, not the agent.) Simply choose the department from the drop down above the text area when creating the canned response.

Also available with canned responses is the availability of the HTML/Rich Text toolbar. This enables the addition of pictures, graphs and links to the response. Emphasis can be placed on specific words or phrases with the tool bar.

Variables can be added to the body of the responses to allow the data of the correlating fields to be pulled automatically in place of the variable. If there is no information in the field, the space will be left blank where the variable is located.

Attachments can also be added to Canned Responses which will attach to the response/ticket when populated. Attachments can be removed prior to sending the response if necessary.
