**TICKET ESCALATION PROCESS DOCUMENT FOR CUSTOMER SERVICES HELPDESK SYSTEM**

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# Introduction

This document contains functional level details for the “Escalation” section of Customer Services Helpdesk Software.

In the event of Customer Services (CS) Agent(s) requiring to escalate a particular ticket to different departments, they will be able to do so by clicking on “Edit Ticket” followed by selecting the particular ticket and selecting the wanted department for escalation of that ticket. Once a ticket has been escalated, the department personnel to whom the escalation has been done will be notified through auto-generated email regarding the same. Also, once the departmental user logs into the software, they will be able to view escalated tickets in the form of a notification. Once the departmental user submits an escalated ticket to the CS Agent, the software will display a notification icon to the CS Agent to view details on the same.

NOTE: Only “Open” and “Reopened” categories of tickets will be escalated to a departmental user

# Escalated Tickets - Dashboard View of Departmental User

On login to the software, the departmental user to whom the tickets have been escalated to, will be able to view the list of escalated tickets.

**NOTE**: Fields marked with an asterisk “\*” are mandatory and the user will not be able to proceed to save the transaction without entering/selecting data in them

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| **Document ID** | **R Requirementsents** |
| 2.1 | **Ticket List**: The following page will get displayed to the departmental user on logging into the software |
| 2.1.1 | **Escalated Tickets (Notification Icon)**: Newly escalated tickets by the CS Agent will get displayed in this icon to the departmental user in descending order of generation  Yellow Background: Newly Escalated Tickets in Yellow  Purple Background: Re-escalated Tickets in Purple |
| 2.1.1.1 | **Escalated Tickets (Display)**: On clicking the “Escalated Tickets” notification icon, the software will display list of tickets that have been escalated by the CS Agent to the departmental user. The following content will get displayed to the departmental user after clicking on “Escalated Tickets Notification Icon” in “hyperlink” mode (NOTE: The data mentioned in #--# will be dynamic data and will get displayed accordingly based on tickets escalated):   1. “Ticket Number #Ticket Number# escalated by CS Agent #CS Agent Name#” 2. “Ticket Number #Ticket Number# escalated by CS Agent #CS Agent Name#”   On clicking on the ticket details mentioned above in “hyperlink” mode, the software will display ticket details to the departmental user in a separate pop-up as shown below |
| 2.1.1.1.1 | **Ticket Title**: The Title of the Ticket will get displayed in this field |
| 2.1.1.1.2 | **Ticket No.**: The Ticket Number will get displayed in this field |
| 2.1.1.1.3 | **Invoice Dt.**: The Date of the Invoice will get displayed in this field |
| 2.1.1.1.4 | **Invoice No.**: The Invoice Number will get displayed in this field |
| 2.1.1.1.5 | **Net Amount**: The Net Invoice Amount will get displayed in this field |
| 2.1.1.1.6 | **View Invoice (Button)**: On clicking this button, the departmental user will be able to view the soft copy of the Invoice in a separate pop-up |
| 2.1.1.1.7 | **Invoice Details (Table)**: In this table, details related to the Invoice and Ticket generated will get displayed. An example of “Returns” ticket type has been displayed for understanding purpose |
| 2.1.1.1.7.1 | **Sr. No.**: The Serial Numbers will get displayed in this column |
| 2.1.1.1.7.2 | **Product Name**: The Name of the Product will get displayed in this column |
| 2.1.1.1.7.3 | **Order Quantity**: The Quantity ordered of the Product will get displayed in this column |
| 2.1.1.1.7.4 | **Invoice Quantity**: The Invoice Quantity of the Product will get displayed in this column |
| 2.1.1.1.7.5 | **Unit Price**: The Price of the Product will get displayed in this column |
| 2.1.1.1.7.6 | **Qty To Be Returned**: The Return Quantity will get displayed in this column |
| 2.1.1.1.7.7 | **Boxes To Be Returned**: The Return Quantity of the Number of Boxes will get displayed in this column |
| 2.1.1.1.8 | **Comments\***: The departmental user will be required to enter comments related to the escalated ticket in this field |
| 2.1.1.1.9 | **Upload Attachment**: The departmental user will be able to select and upload an attachment if required by clicking on the “Click Here” button and selecting the desired file to attach |
| 2.1.1.1.10 | **Submit (Button)**: On clicking this button, the software will submit details of escalated ticket to the CS Agent regarding the same through auto-generated email |
| 2.1.1.1.11 | **Clear (Button)**: On clicking this button, the software will remove data mentioned in Point No. 2.1.1.1.8 & Point No. 2.1.1.1.9 |
| 2.1.1.1.12 | **Close (Button)**: On clicking this button, the software will close the “Ticket Details” pop-up and migrate the user to the Dashboard page |
| 2.1.2 | **Ticket List Table**: The “Ticket List” table will get displayed to the user along with the following column headers. The tickets displayed in this table will be the ones that have been submitted to the CS Agent by the departmental user |
| 2.1.2.1 | **Sr. No.**: The Serial Numbers will get displayed in this column |
| 2.1.2.2 | **Ticket No.**: The Ticket Numbers will get displayed in this column |
| 2.1.2.3 | **Ticket Date**: The Date of Ticket Creation will get displayed in this column |
| 2.1.2.4 | **Target Completion Date**: The Target Completion Date of the ticket will get displayed in this column |
| 2.1.2.5 | **Customer Name**: The Name of the Customer will get displayed in this column |
| 2.1.2.6 | **A/C No.**: The Account Number of the Customer will get displayed in this column |
| 2.1.2.7 | **Ticket Escalation Date**: The Date of Ticket Escalation by CS Agent will get displayed in this column |
| 2.1.2.8 | **Ticket Escalated By**: The Name of the CS Agent who escalated the ticket will get displayed in this column |
| 2.1.2.9 | **Ticket Submission To CS Agent**: The date of submission of escalated ticket to CS Agent will get displayed in this column |
| 2.1.2.10 | **Actions**: In this column, the user will be able to click on the “eye” icon to view details related to the ticket |
| 2.1.2.10.1 | **Ticket Details**: On clicking the “eye” icon for view ticket, the software will display the following ticket-related details to the departmental user |
| 2.1.2.10.2 | **Ticket Details**: The departmental user will be able to view escalated ticket details in this section of the page |
| 2.1.2.10.3 | **Ticket Title**: The Title of the Ticket will get displayed in this field |
| 2.1.2.10.4 | **Ticket No.**: The Ticket Number will get displayed in this field |
| 2.1.2.10.5 | **Invoice Dt.**: The Date of the Invoice will get displayed in this field |
| 2.1.2.10.6 | **Net Amount**: The Net Invoice Amount will get displayed in this field |
| 2.1.2.10.7 | **View Invoice (Button)**: On clicking this button, the departmental user will be able to view the soft copy of the Invoice in a separate pop-up |
| 2.1.2.10.8 | **Invoice Details (Table)**: In this table, details related to the Invoice and Ticket generated will get displayed. An example of “Returns” ticket type has been displayed for understanding purpose |
| 2.1.2.10.8.1 | **Sr. No.**: The Serial Numbers will get displayed in this column |
| 2.1.2.10.8.2 | **Product Name**: The Name of the Product will get displayed in this column |
| 2.1.2.10.8.3 | **Order Quantity**: The Quantity ordered of the Product will get displayed in this column |
| 2.1.2.10.8.4 | **Invoice Quantity**: The Invoice Quantity of the Product will get displayed in this column |
| 2.1.2.10.8.5 | **Unit Price**: The Price of the Product will get displayed in this column |
| 2.1.2.10.8.6 | **Qty To Be Returned**: The Return Quantity will get displayed in this column |
| 2.1.2.10.8.7 | **Boxes To Be Returned**: The Return Quantity of the Number of Boxes will get displayed in this column |
| 2.1.2.10.9 | **Comments\***: The Comments mentioned by the Departmental user will get displayed in this field |
| 2.1.2.10.10 | **View Attachment**: The attachment uploaded by the departmental user, if any, will get displayed in this field through hyperlink mode of the file name. On clicking the same, the software will display attachment to the departmental user in a separate pop-up |
| 2.1.2.10.11 | **Close (Button)**: On clicking this button, the software will close the “Ticket Details” pop-up and migrate the user back to the Dashboard page |

# CS Agent View of Submitted Escalated Tickets

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| **Document ID** | **R Requirementsents** |
| 3.1 | **Escalated Ticket Updation**: On clicking this link, the software will display the following screen to the CS Agent/CS Manager |
| 3.1.1 | **Escalated Ticket Submission (Notification Icon)**: Newly submitted escalated tickets by the departmental user will get displayed in this icon to the CS Agent/Manager in descending order of generation  Yellow Background: Submission of Newly Escalated Tickets in Yellow  Purple Background: Submission of Re-escalated Tickets in Purple |
| 3.1.1.1 | **Escalated Ticket Submission (Display)**: On clicking the “Escalated Ticket Submission” notification icon, the software will display list of escalated tickets that have been worked upon and submitted by the departmental user to the CS Agent/Manager. The following content will get displayed to the CS Agent/Manager after clicking on “Escalated Ticket Submission Notification Icon” in “hyperlink” mode (NOTE: The data mentioned in #--# will be dynamic data and will get displayed accordingly based on tickets escalated):   1. “Ticket Number #Ticket Number# submitted by Department User #Department User Name#” 2. “Ticket Number #Ticket Number# submitted by Department User #Department User Name#”   On clicking on the ticket details mentioned above in “hyperlink” mode, the software will display ticket details to the CS Agent/Manager in a separate “Department Action on Ticket” pop-up as shown below |
| 3.1.1.1.1 | **Department Action on Ticket (Pop-up)**: On clicking the “eye” icon, the software will display the following page to the user |
| 3.1.1.1.1.1 | **Ticket Details**: The CS Agent/CS Manager will be able to view escalated ticket details in this section of the page |
| 3.1.1.1.1.1.1 | **Ticket Title**: The Title of the Ticket will get displayed in this field |
| 3.1.1.1.1.1.2 | **Ticket No.**: The Ticket Number will get displayed in this field |
| 3.1.1.1.1.1.3 | **Invoice Dt.**: The Date of the Invoice will get displayed in this field |
| 3.1.1.1.1.1.4 | **Net Amount**: The Net Invoice Amount will get displayed in this field |
| 3.1.1.1.1.1.5 | **View Invoice (Button)**: On clicking this button, the CS Agent/CS Manager user will be able to view the soft copy of the Invoice in a separate pop-up |
| 3.1.1.1.1.1.6 | **Invoice Details (Table)**: In this table, details related to the Invoice and Ticket generated will get displayed. An example of “Returns” ticket type has been displayed for understanding purpose |
| 3.1.1.1.1.1.6.1 | **Sr. No.**: The Serial Numbers will get displayed in this column |
| 3.1.1.1.1.1.6.2 | **Product Name**: The Name of the Product will get displayed in this column |
| 3.1.1.1.1.1.6.3 | **Order Quantity**: The Quantity ordered of the Product will get displayed in this column |
| 3.1.1.1.1.1.6.4 | **Invoice Quantity**: The Invoice Quantity of the Product will get displayed in this column |
| 3.1.1.1.1.1.6.5 | **Unit Price**: The Price of the Product will get displayed in this column |
| 3.1.1.1.1.1.6.6 | **Qty To Be Returned**: The Return Quantity will get displayed in this column |
| 3.1.1.1.1.1.6.7 | **Boxes To Be Returned**: The Return Quantity of the Number of Boxes will get displayed in this column |
| 3.1.1.1.1.1.7 | **Comments\***: The Comments mentioned by the Departmental user will get displayed in this field |
| 3.1.1.1.1.1.8 | **View Attachment**: In case the departmental user has uploaded an attachment related to the selected ticket, the same will be available to the CS Agent/CS Manager to view by clicking on “Click Here” button. The attachment will get displayed in a separate pop-up to the CS Agent/CS Manager |
| 3.1.1.1.1.1.9 | **Proceed to Edit Ticket Page**: If the CS Agent/CS Manager is satisfied by the response from the departmental user related to the selected ticket, they will click on “Proceed to Edit Ticket Page” link to close the ticket. If the CS Agent/CS Manager is not satisfied by the response from the departmental user related to the selected ticket, they will click on “Proceed to Edit Ticket Page” link for **re-escalating** the ticket to the same department or a different department |
| 3.1.1.1.1.1.10 | **Close (Button)**: On clicking this button, the software will close the “Department Action on Ticket” pop-up and migrate the user to the “Escalated Ticket Updation” page |
| 3.1.2 | **Ticket List (Table)**: This table will display a list of previously updated escalated tickets in descending order to the CS Agent/CS Manager |
| 3.1.2.1 | **Sr. No.**: The Serial Numbers will get displayed in this column |
| 3.1.2.2 | **Ticket No.**: The Ticket Numbers will get displayed in this column |
| 3.1.2.3 | **Ticket Date**: The Date of Ticket Creation will get displayed in this column |
| 3.1.2.4 | **Target Completion Date**: The Target Completion Date will get displayed in this column |
| 3.1.2.5 | **Customer Name**: The Name of the Customer’s Company will get displayed in this column |
| 3.1.2.6 | **A/C No.**: The Account Number of the Customer will get displayed in this column |
| 3.1.2.7 | **Ticket Escalation Date**: The Date of Ticket Escalation done by CS Agent will get displayed in this column |
| 3.1.2.8 | **Ticket Updated By**: The Name of the Departmental User who worked on the Ticket will get displayed in this column |
| 3.1.2.9 | **Ticket Submission Date**: The date on which Departmental User submitted the escalated ticket to the user will get displayed in this column |
| 3.1.2.10 | **Actions**: In this column, the CS Agent/CS Manager will click on the “eye” icon to view details related to the previously escalated tickets |
| 3.1.2.10.1 | **Ticket Details**: On clicking the “eye” icon for view ticket, the software will display the following ticket-related details to the CS Agent/Manager |
| 3.1.2.10.2 | **Ticket Title**: The Title of the Ticket will get displayed in this field |
| 3.1.2.10.3 | **Ticket No.**: The Ticket Number will get displayed in this field |
| 3.1.2.10.4 | **Invoice Dt.**: The Date of the Invoice will get displayed in this field |
| 3.1.2.10.5 | **Net Amount**: The Net Invoice Amount will get displayed in this field |
| 3.1.2.10.6 | **View Invoice (Button)**: On clicking this button, the CS Agent/Manager will be able to view the soft copy of the Invoice in a separate pop-up |
| 3.1.2.10.7 | **Invoice Details (Table)**: In this table, details related to the Invoice and Ticket generated will get displayed. An example of “Returns” ticket type has been displayed for understanding purpose |
| 3.1.2.10.7.1 | **Sr. No.**: The Serial Numbers will get displayed in this column |
| 3.1.2.10.7.2 | **Product Name**: The Name of the Product will get displayed in this column |
| 3.1.2.10.7.3 | **Order Quantity**: The Quantity ordered of the Product will get displayed in this column |
| 3.1.2.10.7.4 | **Invoice Quantity**: The Invoice Quantity of the Product will get displayed in this column |
| 3.1.2.10.7.5 | **Unit Price**: The Price of the Product will get displayed in this column |
| 3.1.2.10.7.6 | **Qty To Be Returned**: The Return Quantity will get displayed in this column |
| 3.1.2.10.7.7 | **Boxes To Be Returned**: The Return Quantity of the Number of Boxes will get displayed in this column |
| 3.1.2.10.8 | **Comments\***: The Comments mentioned by the Departmental user will get displayed in this field |
| 3.1.2.10.9 | **View Attachment**: The attachment uploaded by the departmental user, if any, will get displayed in this field through hyperlink mode of the file name. On clicking the same, the software will display attachment to the CS Agent/Manager in a separate pop-up |
| 3.1.2.10.10 | **Close (Button)**: On clicking this button, the software will close the “Ticket Details” pop-up and migrate the user back to the “Escalated Ticket Updation” page |

# Autoresponse

NOTE: The data mentioned below between two hash marks #--# is dynamic.

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| **Document ID** | **R Requirementsents** |
| 4.1 | **When a ticket is escalated by CS Agent to Departmental User:** An auto-generated email will be sent to Departmental User when a CS Agent will escalate the ticket to that department  *Trigger Point:* When CS Agent escalates ticket to a Department  *Recipient:* Department User, CS Manager  *Email Subject:* Ticket Number #Ticket Number# has been escalated to you by CS Agent #CS Agent Name#  *Email Body:*  Hello #Departmental User Name#,  Ticket Number #Ticket Number# has been escalated to your department on #Date & Time of Ticket Escalation# by CS Agent #CS Agent Name#.  Kindly login to the CS Helpdesk Software to view more details related to the escalated ticket.  This is an automated response from Customer Services Helpdesk System.  Regards,  B & S Distribution  Customer Services Department  --- Confidentiality Statement ---  This message and any included attachments are from B&S Group and are intended only for the addressee(s). The information contained herein may include privileged or otherwise confidential information. Unauthorised review, forwarding, printing, copying, distributing, or using such information is strictly prohibited and may be unlawful. If you received this message in error, or have reason to believe you are not authorized to receive it, please promptly delete this message and notify the sender.  Thank You. |
| 4.2 | **When action is taken on an escalated ticket by Departmental User:**  *Trigger Point:* When Department User takes action on the escalated ticket  *Recipient:* CS Agent, CS Manager  *Email Subject:* Ticket Number #Ticket Number# escalated by you to #Department Name# has been updated  *Email Body:*  Hello #CS Agent Name#,  Ticket Number #Ticket Number# escalated by you to #Department# on #Date & Time of Ticket Escalation# has been updated by #Departmental User Name# on #Date & Time of escalated ticket updation#.  Kindly login to the CS Helpdesk Software to view more details related to the same.  This is an automated response from Customer Services Helpdesk System.  Regards,  B & S Distribution  Customer Services Department  --- Confidentiality Statement ---  This message and any included attachments are from B&S Group and are intended only for the addressee(s). The information contained herein may include privileged or otherwise confidential information. Unauthorised review, forwarding, printing, copying, distributing, or using such information is strictly prohibited and may be unlawful. If you received this message in error, or have reason to believe you are not authorized to receive it, please promptly delete this message and notify the sender.  Thank You. |