**SUPPORT TICKETING SYSTEM FOR IT CONSULTING COMPANY**

Business Requirements Document

TICKETING SYSTEM FOR IT CONSULTING COMPANY

TECHNICAL SPECIFICATIONS DOCUMENT

VERSION 1

02-13-2021

**TECHNICAL REQUIREMENTS DOCUMENT**

**TICTKETING SYSTEM**

**1. GENERAL INFORMATION**

1. **Introduction**

This is a project for a support ticketing system where internal and external clients can raise issues via a ticketing tool. The chosen ticketing tool is the Freshdesk open source software which will help with data collection.

**1.1 Glossary of Items**

BRD- Business requirement document is a formal document that lays out the goals and expectations an organisation hopes to achieve by partnering with a vendor to complete a specific project. A Business requirements document, or BRD, contains all of the details associated with projects or problems on which a business is centered. It includes expected outcomes and a pathway that outlines what is needed to get there. It provides what is needed to achieve business objectives alongside the costs by providing clarity on business needs.

Customer Journey Map- a customer journey map is a visual representation of the customer’s interaction with the business. It shows the stages the customer goes through as they interact with the business.

Process Flow- it refers to activities that are required to be completed consecutively to achieve a business workflow.

AS IS Process Work Flow- AS IS work flow refers to the analysis of the current process management of work activities.

TO BE Process Workflow- this refers to the desired future state of work process.

Support ticketing system- the support ticketing system is process flow improvement tool intended to enable internal and external clients raise issues and requests.

Internal clients- clients within the company/employees.

External clients- clients outside the company.

**1.2 Intended audience and reading suggestions**

The intended audience for this document is project sponsors, project managers. Developers, internal clients, Freshdesk team, business analysts, quality assurance team, accounting and marketing.

For understanding of the project, it is suggested that the project documents be read in the following order: project charter, Project scope document, process as is and to be journey map, and business requirements document.

**1.3 Document convention**

This document uses the following conventions. <<*Include the conventions as per your application*>>

|  |  |
| --- | --- |
| DB | Database |
| DDB | Distributed Database |
| ER | Entity Relationship |

**1.4 References**

1. https://krazytech.com/projects/sample-software-requirements-specificationsrs-report-airline-database.

2. https://lhc-proj-qawg.web.cern.ch/CD-ROM-v4-0/Quality/QA202.pdf.

## 2.1 Business Goals and Objectives

1. Implement support ticketing system to track and resolve customer complaints and requests faster.
2. To improve customer satisfaction.
3. Provide data for business analysts to make projections and forecasts.

## 2.2 Problem Statement

In the current system, clients send emails or phone calls to discuss their issues with no proper repository and tracking if a request has been delivered successfully. There is a need for a system where everyone in the system can monitor tickets and the corresponding solutions. The support ticketing system will provide an avenue for effective tracking, monitoring and resolution of complaints and requests. There is also a need to collect data gathered from complaints and requests to improve business processes as well as for planning and forecasting.

**2.3 Personnel requirements**

The stakeholders involved in the implementation of the ticketing system are:

**Stakeholders List:**

|  |  |
| --- | --- |
| **Stakeholders** | **Support roles** |
| Project sponsor | Approve budget and make funds needed available. |
| Project manager | Planning, organising, scheduling, monitoring and directing teams and activities. |
| Business analyst | Use data analytics to evaluate processes and establish data-driven recommendations for project manager and IT. |
| Developers (L1, L2, and L3 Team) | Create a ticketing support system for claiming, resolving and closing claims by passing it to appropriate teams for resolution. |
| Quality Assurance | Ensure tools employed to create ticketing systems run efficiently and effectively by monitoring the project process and progress. |
| Internal clients | Employees within the organisation which will learn to use ticketing system to grant requests and resolve complaints. |
| External clients | Customers who will use ticketing system to lodge complaints and requests. |

**Product requirements**

Features

Freshdesk is built to enhance productivity and speedy response to customers. organisations can easily stay on top of all tickets and work collaboratively with colleagues to efficiently resolve customer issues. The features of the Freshdesk system include:

1. Ticketing

The ticketing system helps the teams prioritise, organize and assign tickets so they can resolve claims faster. It features:

* Team inbox which tracks and manages incoming support tickets from multiple channels with one inbox.
* Agent collision- this ensures multiple agents don’t wind up working on the same ticket by accident.
* SLA Management- sets deadlines for ticket response and resolution based on different business hours or categories.

###### Ticket Field Suggester**-** Automatically suggest ticket fields to categorize, prioritize and route incoming tickets

###### Thank You Detector **-** Prevent reopening of tickets when customers respond with a thank you

###### Custom Ticket Status **-** Create custom statuses that suit your workflow to identify what stage a ticket is in.

###### Scenario Automation **-** Perform multiple actions on a ticket with a single click by automating repeated actions.

###### Canned Responses **-** Provide quick, consistent responses to common questions by creating pre-formatted replies.

1. Collaboration tools

###### Team Huddle- discuss specific parts of tickets with experts from across your company to figure out the best solutions.

###### Shared Ownership - share ownership of tickets with other teams without losing visibility into progress being made on the issue.

###### Linked Tickets - link related tickets together to keep track of widespread issues and deliver consistent responses.

1. Support across channels

###### Email - convert support emails into trackable tickets in your helpdesk that you can manage and resolve.

###### Phone -set up a fully functional call center and record and track calls by converting them into tickets.

###### Chat- engage, support, and retain customers through live chat.

###### Social media - integrate your company’s Facebook page and Twitter handles and manage them from within the helpdesk.

###### Website - let customers raise tickets from your website and display related knowledge base articles as they type.

###### WhatsApp - engage your customers instantly through WhatsApp and resolve their queries faster.

1. Work-field management

###### Service tasks - create service tasks for tickets that need a field team response and track its status to completion.

###### Service groups- create field technician groups based on location, priority and other factors to reduce waiting time and boost first-time fix rates

###### Scheduling Dashboard- drag and drop appointments, assign tasks and get a bird's eye view of your field team workload.

###### Mobile field service - enable field technicians to pick up service tasks, update information and resolve issues on the go

###### Customer signature- obtain signatures via the Freshdesk mobile app with a single swipe and attach it to the service task.

###### Time tracking - automatically track time spent working in the field with the mobile app and log your billable hours.

1. Security

* Custom SSL certificates - Freshdesk accounts come with custom SSL certificates that let you secure your own support domain or vanity URL for a safe and personalized experience.

###### IP and Network restrictions - whitelist IP ranges, restrict login access outside of work or create secure and exclusive access for agents to login from anywhere by linking IP whitelisting to a VPN (virtual private network).

###### Identity & access management - let agents and user’s login to Freshdesk using their other accounts by setting up a single sign on (SSO) script to authenticate their credentials.

1. Customisation capabilities

* Portal customization - customize the look and layout of your support portal with full CSS customization and ready-made themes.
* Customize agent roles - give differential permissions for access and actions according to the roles and responsibilities of agents.
* Custom ticket forms - Collect information important to your business by adding and modifying the ticket form fields.
* Custom URL -- use your own vanity URL for your support portal and provide a seamless customer experience.

###### Custom Apps - build and integrate custom apps to carry out workflows that are unique to your business.

###### Customer Segments - provide personalised support for different customers by classifying them based on their support needs.

**User Overview**

Freshdesk ticketing system provides users with easy to navigate system in which they can make complaints and requests. When a user logs into the system the client is guided to lodge complaint or make a request which can be monitored and resolved speedily.

**Description**

The support ticketing system is a project for internal and external clients to raise issues via a ticketing tool. The ticketing system will have a ranking order as follows:

Urgent- 2-3 Business Hours

High- 4-8 Business Hours/Business Day

Meduim- 8-16 Business Hours/ 1-2 Business Days

Low- 16-32 Business Hours/2-4 Business Days

The ticketing system will be outsourced to Freshdesk.

**2.6 Non-functional requirements**

1. Performance- the ticketing system will improve performance of internal clients and overall business operations.
2. Information- using the ticketing system, all information required to improve business processes are made easier. The data collected from the clients at the point where complaints are lodged or requests are made enables the issues to be resolved quicker.
3. Economy- using Freshdesk open source software system is more economical than building a personalized ticketing software.
4. Control and security- utmost care will be taken to protect user data.
5. Efficiency- the Freshdesk ticketing system will work make work process efficient by minimizing cost and maximizing output.
6. Service- the ticketing system will serve both external and internal clients in dealing speedily with complaints.

**2.7 External Interface Requirements**

Users of Freshdesk are recommended to check with their system administrators to ensure the following system and browsers are available.

Operating System Requirements

Ensure your computers are installed with one of the following operating systems:

* Windows 7.0 or Higher
* OSX Mavericks or Higher

For the operating system to run smoothly, we recommend you refer to Microsoft or Apple websites on their minimum hardware requirements.

Browser Requirements

Supported web browsers:

* Chrome/Firefox/Safari/Edge: Latest 2 versions
* Internet Explorer: 11

The Freshdesk Mint works best with Chrome on a dual-core CPU and 6GB RAM.

Browser Feature Requirements

Depending on the browser of your choice, you will then have to configure the following browser features:

* JavaScript must be enabled
* Cookies must be enabled
* LocalStorage must be enabled
* HTTPS - TLS v1.2 or Higher

Mobile Operating System Requirements

Freshdesk apps are available on both the App Store and Google Play. We recommend as a minimum requirement you use the following versions or higher versions of the mobile operating system:

* iOS: 10.0 or higher
* Android: 5.0 (Lollipop) or higher

Customer functional requirements

1. Clients provide data pertaining to complaint or issue.
2. Clients follow instructions provided by either L1, L2 or L3 teams.
3. Provide feedback to teams for data and business improvement purposes.

## 

## Business Constraints

1. Time and cost challenges
2. Ensuring the open source software has every component tailored to meet business and customer needs

## Business Assumptions and Dependencies

1. Project team possess technical know-how to use and implement support ticketing system
2. Funds made available will be enough
3. No eventualities in terms on finishing project on or before deadline.

**3.0 Appendix**

References:

November, 2016

https://support.freshdesk.com/support/solutions/articles/227719-system-and-browser-requirements-for-freshdesk

<https://www.iom.int/sites/default/files/procurement/Technical%20Specifications_Mobile%20Surveillance%20System_Item%203.pdf>

Appendix A

The document talks about the ticketing system will provide a platform for speedy resolution of issues and lodging of complaint. The system will be outsourced to Freshdesk in order to save time and cost. The new ticketing system will improve business operations and provide data for future purposes.

Appendix B

The document also contains Introduction, Description, System Features, External Interface Requirements, and Non-Functional Requirements.

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