## Sales BOA ticket/chat update process

## Ticket Status

* **Queued** – The ticket has been opened by user but had not been picked up by BOA.
* **Active** – The ticket is in the process of being worked by BOA.
* **Ready to Close** – Ticket has been worked, issue has been resolved and got confirmation from user to close the ticket.
* **Cancelled** – Ticket is cancelled, once the ticket is in this status there is no changing the status a new ticket will be needed. Ticket can be cancelled when either the ticket come to us by mistake or user/STH team ask us to cancel.
* **Deferred – Cust Information** – There are 2 scenarios we mark the ticket as “Deferred Cust Information”

1. For tickets pending with Users for retry/retest - if the user is not readily available to retry or retest, the ticket will be updated as Deferred Customer Information. Once we get confirmation we will close the ticket. If we don’t get a response for more than 3 days, we will send an email to user/STH team and close the ticket.
2. For tickets awaiting information from the users, the ticket remains in “Deferred Cust Information”. If we don’t get a response for more than 3 days, we will send an email to user/STH team and close the ticket

* **Deferred – Cust Vendor** – Issue is resolved but waiting on IE ticket to be closed. We need to follow up with the IE ticket application holders to have them close the ticket.
* **Deferred – Delayed Maintenance** – WA has been given and issues is resolved, ticket requires a code fix to be deployed for perm fix. The ticket logs should document the date of the ETA and the application. If we do not have the ETA mark it as Need ETA in Notes field.

## Updating Tickets (Mandatory updates every day)

* When activating ticket make sure you update the following fields.

Notes – “New”

Handover Text – “att id”

* When we mark the ticket as “**Deferred – Cust Information**” following field(s) should be updated.

Notes –

“WOU – Need Information” (if we need more information from user)

“WOU – Need Confirmation” (WA is done, and user need to confirm)

* When we mark the ticket as “**Deferred – Cust Vendor**” following field(s) should be updated.

Service Restore Date – when issue was resolved

* When we mark the ticket as “**Deferred – Delayed Maintenance**” following field(s) should be updated.

Service Restore Date – when issue was resolved

Notes – Either “Need ETA – Application Name” or the actual “ETA – Application Name”.

* When we mark the ticket as “Ready To Close” following field(s) should be updated.

Question Template - RCA-SWAT-BOA

Responsible BOA is required to update the Ticket log for every little progress made towards resolution. Updating ticket log on regular interval also reflects how religiously BOA is following up for the pending resolution. At the minimum we should update all active tickets once a day and deferred tickets once in 2 days.

End of the each and every day ‘Active’ ticket should be updated with the status of which application is working or waiting on. That should be updated in ‘Notes’ field with the following format.

“Application Name” – “IE ticket #”

For Ex: If it’s being worked by EFMS BOA then Notes filed should be

“EFMS BOA – 237456245”

If it is being worked by multiple applications, for ex EFMS BOA and ROME BOA then notes field should be

“EFMS BOA – 237456245”

“ROME BOA – 237456246”

## Creating IE Tickets

When we need support from other applications we will be engaging with IE tickets. Before we create IE tickets we need to make sure we do the initial triage and look at the logs in the applications. (***Especially for the Sales applications***). When we create IE tickets we need to follow the following things:

* Clear the handover text.
* Need to give the clear description on where we are and what do we need from that application.
* Attach logs as needed.

## Handling issues (What to do when you pick up the ticket):

As soon as we get the ticket, open a chat room with following naming standard

ASAP - “Main Ticket # BOATicket # Customer name”

GOSS – “GOSS Ticket # Customer Name”

\* Where # - Ticket number, Customer name – Name of the actual customer

**Steps to be followed**:

* After opening the chat room, enable Rolling Archive for the chat and enter the issue details in Meeting Attributes.
* Do initial investigation and find out where is the error and engage BOA from the impacted Application
* Create an IE for Impacted Application to start their work.
* Any issues with impacted application, reach out to Application BOA first and if they are unable to handle the issue contact the developers from that Application
* Get all the folks into the chat including STH person (ASAP) or User (GOSS).