



TxHelpdesk User Manual



Puthur Hills, Parkala, Udupi district

Karnataka 576107 – India

Contents

1. Introduction

2. Tickets

2.1 Ticket Listing Page

2.2 Ticket Description Page

2.2.1 Forward Message

3. Create a new ticket

4. Side Navigation Bar

5. Top Navigation Bar

5.1 Notification

5.2 Profile and Log out

5.3 More Options

6. Admin Configuration

7. Service-Level Agreement (SLA)

8. Smart Rules

9. Dashboard

10. Forgot your password?

1. Introduction

TxHelpdesk is an advanced ticketing module that helps enterprises manage their customer email queries in real-time. TxHelpdesk allows categorisation of emails based on various metrics and creates or updates support tickets. These tickets are then distributed to users assigned to the relevant category based on their live status. This document describes the various configurations and features and their usage.

2. Tickets

The emails read from the mail server are represented as tickets in TxHelpdesk.

2.1 Ticket Listing Page

The list of all the tickets in the system along with the key details are displayed here. You can filter the tickets based on status, priority, assigned user, queue. You can search for the tickets by title as well. You can set the refresh rate to auto refresh the page for new tickets. The tickets are ordered by last modified by default. You can perform bulk updates on the tickets like move to another queue, delete and assign.

Tickets

Status: AllQueue: →

⌕

Show 25 tickets

<input type="checkbox"/>	Status ↕	# ↕	Title ↕	Queue ↕	Pr ↕	Submitter	Assigne...	SLA ↕	Last Mo.↓
<input type="checkbox"/>	Pending	dev-6829	How do I setup this device? (1)	Dev	●	test guy	John Mi...	●	a few se...
<input type="checkbox"/>	Pending	dev-6827	This is a new ticket (17)	Dev	●	test guy	Unassig...	●	Septemb...
<input type="checkbox"/>	Pending	dev-6828	I am not able to update the software	Dev	●	John Doe	Daryl Co...	●	Septemb...
<input type="checkbox"/>	Pending	dev-6826	This is another ticket (4)	Dev	●	test guy	Unassig...	●	Septemb...
<input type="checkbox"/>	Duplicate	dev-6825	Test Ticket (17)	Dev	●	hank gre...	Daryl Co...	●	Septemb...
<input type="checkbox"/>	Pending	dev-6824	Hello (14)	Dev	●	hank gre...	Daryl Co...	●	Septemb...

Showing 1 to 6 of 6 entries

Previous 1 Next

2.2 Ticket Description Page

Here, you'll be able to see all the details of a particular ticket.

Message Type: There are three kinds of messages that you will see in a particular ticket. They are as follows:

1. **Public:** The messages that are read from the mail server and go out to the mail server.
2. **Private:** The internal messages that are used to communicate with other users.
3. **System:** The messages generated by the system with respect to an automated task or change.

The screenshot displays a ticket management interface. At the top, there's a header with 'All tickets' and a search bar. Below this, the ticket details for 'Test ticket' (ID: SUP-107560) are shown. The ticket is from 'Interlink Support' and was received on September 3rd 2020 at 4:45:08 pm. The ticket is currently in the 'Support' queue, has a priority of '3. Normal', and is assigned to 'Radhika Shenoy'. The ticket is 14 hours old and was last updated 21 hours ago. The ticket description includes a thank you message from the Interlink Support Team. The right sidebar contains sections for 'CONTACT INFORMATION' (Interlink Support, helpdesk@linknet.com), 'TAGS' (No Tags Found), 'SLA' (21 hours ago), 'RELATED' (No related tickets found), and 'DEPENDENCIES' (This ticket cannot be resolved until the following ticket(s) are resolved).

Clicking on the **“More Actions”** will reveal actions that can be performed on the ticket.

- **Merge Ticket:** When you click this option, you'll be presented the dialog where you have to pick the ticket you want to merge this ticket with. Once, you merge the ticket with another one, you'll no longer be able to perform actions on this ticket. All the future actions should take place on the ticket which was merged with this ticket.
- **Clone Ticket :** It creates an exact copy of the ticket.
- **Forward Ticket :** This option allows you to forward ticket to someone else over email.

Contact Information : The information of the user who created this ticket is displayed. You can edit the contact info by clicking on the pencil icon on the top right of the contact info block.

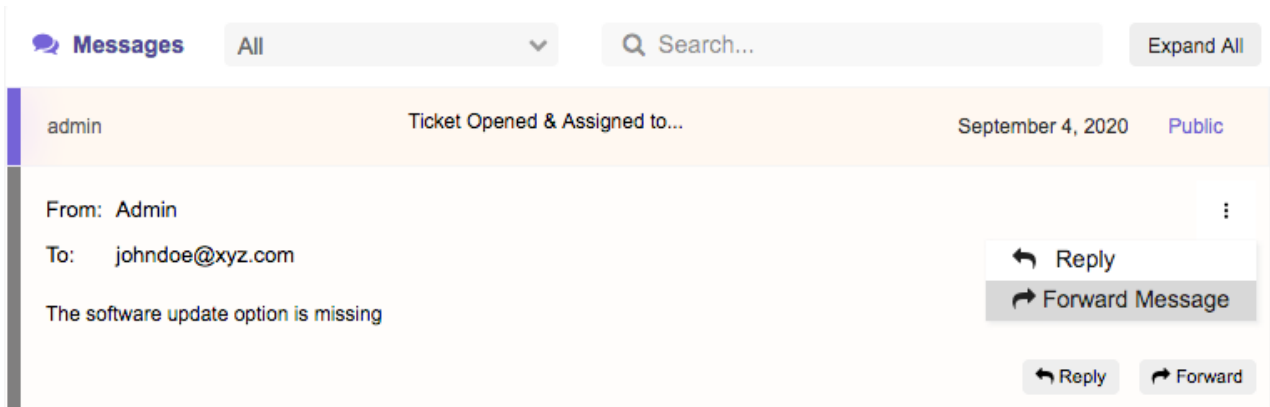
Tags : You can add the relevant tags to your ticket so that you can filter the tickets based on that tag for your purposes.

SLA : you can associate SLA with your ticket. The status of the SLA will be displayed on the right side of the ticket description page.

Related Ticket : If you find that a ticket is related to another ticket you can create a relationship between them.

Dependent Ticket : There are some situations where you have to resolve a particular ticket before another ticket is resolved. In such cases, you can add a dependency ticket to that ticket.

2.2.1 Forward Message



Click on the ellipsis icon on the top right corner of the message as shown in the image above and then select Forward Message option which will land you into the forward message page as shown below.

► Forward Message [dev-6828]

To and CC fields should contain comma separated e-mail IDs

To


Cc

Bcc

Title

I am not able to update the software

Comment



The software update option is missing

Choose how to handle the reply to this forwarded ticket

Append to the Existing Ticket

Attachments (max file-size: 20MB)



Send

Cancel

You can edit the original message and add / remove attachments before forwarding the message.

The *Choose how to handle the reply to this forwarded message* has two options:

1. Append to the existing ticket: The reply to this forwarded message will be appended to the same ticket.
2. Create a new ticket: The reply to this forwarded message will create a new ticket.

3. Create a new ticket

Click on the + icon on the side navigation bar to get to this page.

[Create Ticket](#)

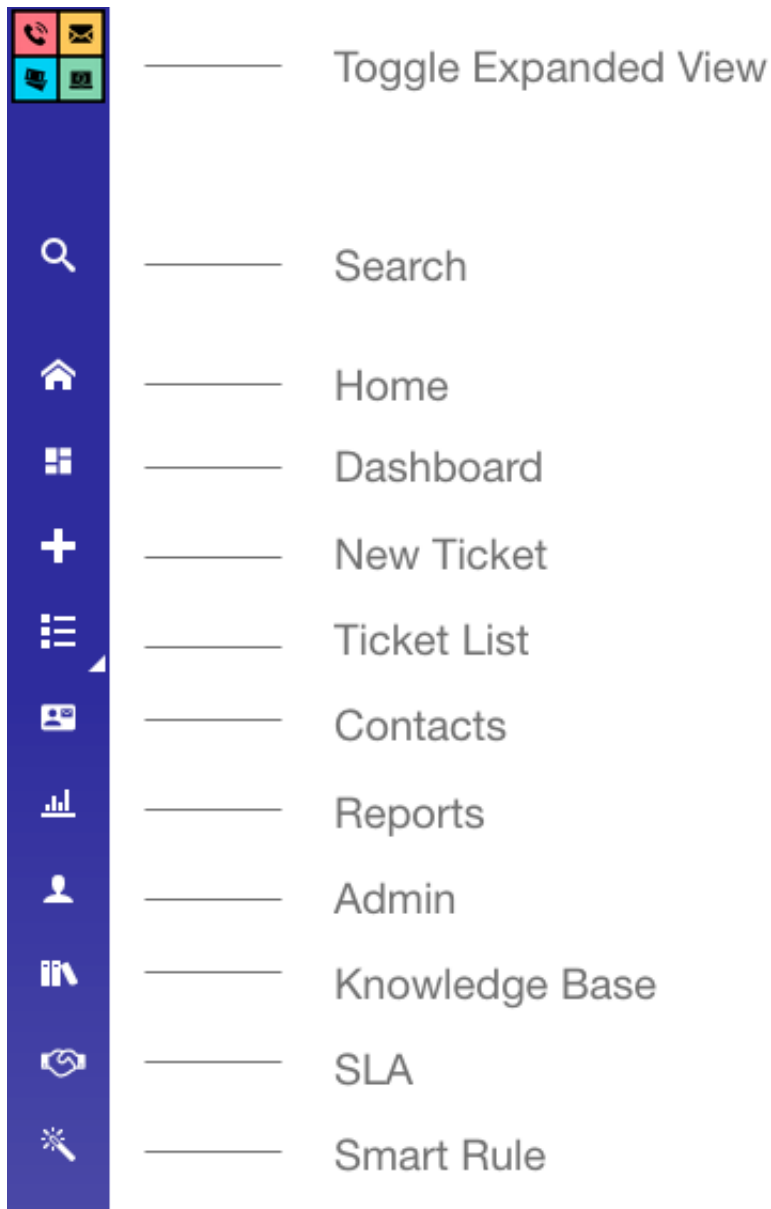
Unless otherwise stated, all fields are required. Please provide as descriptive a title and description as possible.

<p>Summary of the problem *</p> <div style="border: 1px solid #ccc; height: 40px;"></div> <p>Description of your issue *</p> <div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; border-bottom: 1px solid #ccc; padding: 2px;"> 🔗 📄 🖨️ 🔄 💻 Source B <i>I</i> <u>I_x</u> ☰ ☷ Format ↕ A ▾ A ▾ </div> <div style="height: 150px;"></div> </div> <p>Please be as descriptive as possible and include all details</p>	<p>Queue / Category *</p> <div style="border: 1px solid #ccc; padding: 2px;">----- ▾</div> <p>Priority</p> <div style="border: 1px solid #ccc; padding: 2px;">3. Normal ▾</div> <p><small>Please select a priority carefully. If unsure, leave it as '3'.</small></p> <p>Due on</p> <div style="border: 1px solid #ccc; padding: 2px;"> <input type="text"/> 📅 </div> <p><small>Due date</small></p>
<p>Attach</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> <input style="flex-grow: 1;" type="text"/> Choose file Clear </div> <p><small>You can attach a file such as a document or screenshot to this ticket.</small></p>	<p>First Name</p> <div style="border: 1px solid #ccc; height: 30px;"></div> <p>Last Name</p> <div style="border: 1px solid #ccc; height: 30px;"></div> <p>E-mail Address</p> <div style="border: 1px solid #ccc; height: 30px;"></div> <p><small>This e-mail address will receive copies of all public updates to this ticket.</small></p> <p>CC Address</p> <div style="border: 1px solid #ccc; height: 30px;"></div> <p><small>This e-mail address will receive copies of all public updates to this ticket & Allows Multiple Email Addresses Separated by Commas Space Semicolon .</small></p> <p>Case Owner</p> <div style="border: 1px solid #ccc; padding: 2px;">----- ▾</div> <p><small>If you select an owner other than yourself, they'll be e-mailed details of this ticket immediately.</small></p>

[Submit Ticket](#) [Cancel](#)

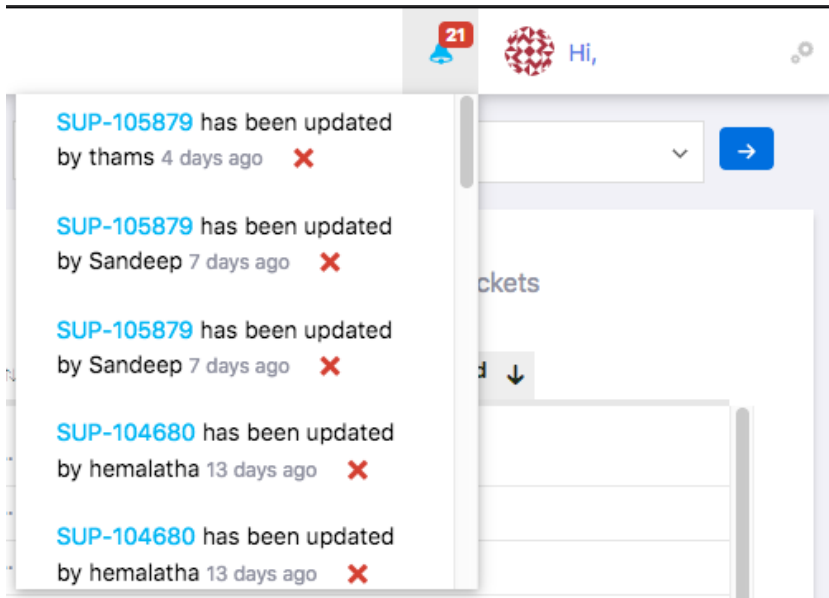
4. Side Navigation Bar

You can quickly access different pages from the sidebar.



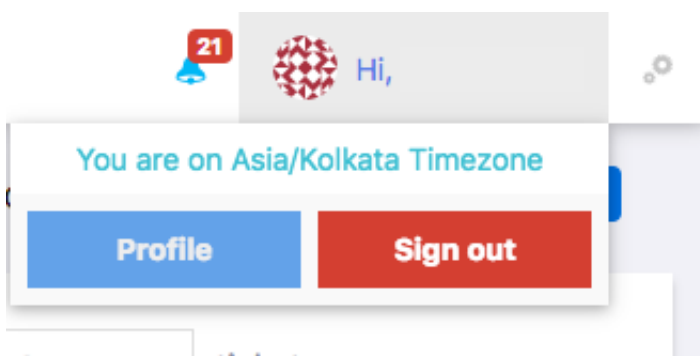
5. Top Navigation Bar

5.1 Notification



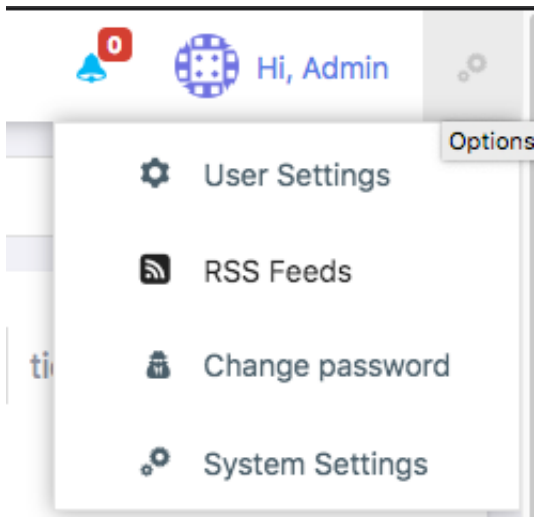
You can check all your notifications by clicking on the bell icon.

5.2 Profile and Log out



Profile will display the logged in user information and the user can click on the **Log out** to log out of the system.

5.3 More Options



On the top right corner of the webpage, you will find the settings icon. On click, you will be presented with various options.

User Settings : Each user of the system can configure some of the settings to his needs. For example, each user has his own user signature to be used when sending messages. These kind of user specific settings can be found here.

Change Password : You can click on this option to change your password.

System Settings : System settings will redirect you to the admin page.

6. Admin Configuration

Click on the *Admin* Icon on the sidebar to access this page.

CRUD (Create, Read, Update and Delete) operations are allowed on all the options below.

On some of the configs, you'll see a multi select field named *Queue* which lets you enable the option only for those queues.

Type	Description
Users	Set permissions and user configuration.
Groups	Configure group permissions.
Queues	Configure queues.
Ticket Status	Define custom status and color code for status.
Ticket Tag	Configure tags.
Ticket Custom Fields	Additional information to be captured for a ticket can be defined here.
Ticket Contacts	CRUD contacts.
Contact Custom Fields	Additional contact fields can be defined here.
E-mail Templates	Defining email templates with placeholders.
Pre-set Replies	Save text that is frequently used. You can use it while writing responses.
Knowledge Base Categories	Define Categories for Knowledge Base.
Knowledge Base Items	Write Articles for Knowledge Base.
Ignored E-mail Addresses	Add the e-mail addresses to be ignored by the system while reading e-mails.

7. Service-Level Agreement (SLA)

SLAs can be defined if you want to measure the availability and efficiency of your helpdesk team.

Title:

2Hours SLA

Description:

2Hours SLA

Condition:

Time taken to close a ticket

Interval:

02:00:00

Action:

If action is selected as an

Email: an Notification email sent to 'Updated Ticket CC Address' which is defined in queue setting and to the ticket assigned user

Active?



Queues: [Select All](#)

Status Exclusion:

You can have a condition like time taken to resolve, time taken to close or time taken to send first response to a ticket. If the time taken to fulfill the condition is more than the interval specified then the SLA is said to be breached.

If you want to take some action on SLA breach, that can be defined in the *Action* field.

We can assign the SLA only to the necessary queues and status. Rest of the queues and status won't be tracked by SLA.

8. Smart Rules

Smart Rules will help you in automating the tasks so that you can work without bothering about some of the routine checks.


You can access the smartrule page by clicking on the smartrule icon in the side navigation bar.

Smart Rules

+ Add

Executing all the matching rules in order

Show entries



Auto Close Tickets

Rule Execution Count: 51 Queues: 1



General Report

Rule Execution Count: 167 Queues: 1



Once you are in the smart rule page, you can add a new smart rule by clicking on the *Add* button on the top right corner of the page.

check_payment_status *

☒ Active



☐ One Time Execution

CLAUSES

ACTIONS



Match **ALL** of these conditions

Add

Title	contains	Payment	
Priority	is exactly	High	

Match **ANY** of these conditions

Add

Status	is exactly	Open	
Status	is exactly	Reopened	

Queues: [Select All](#)

 Support

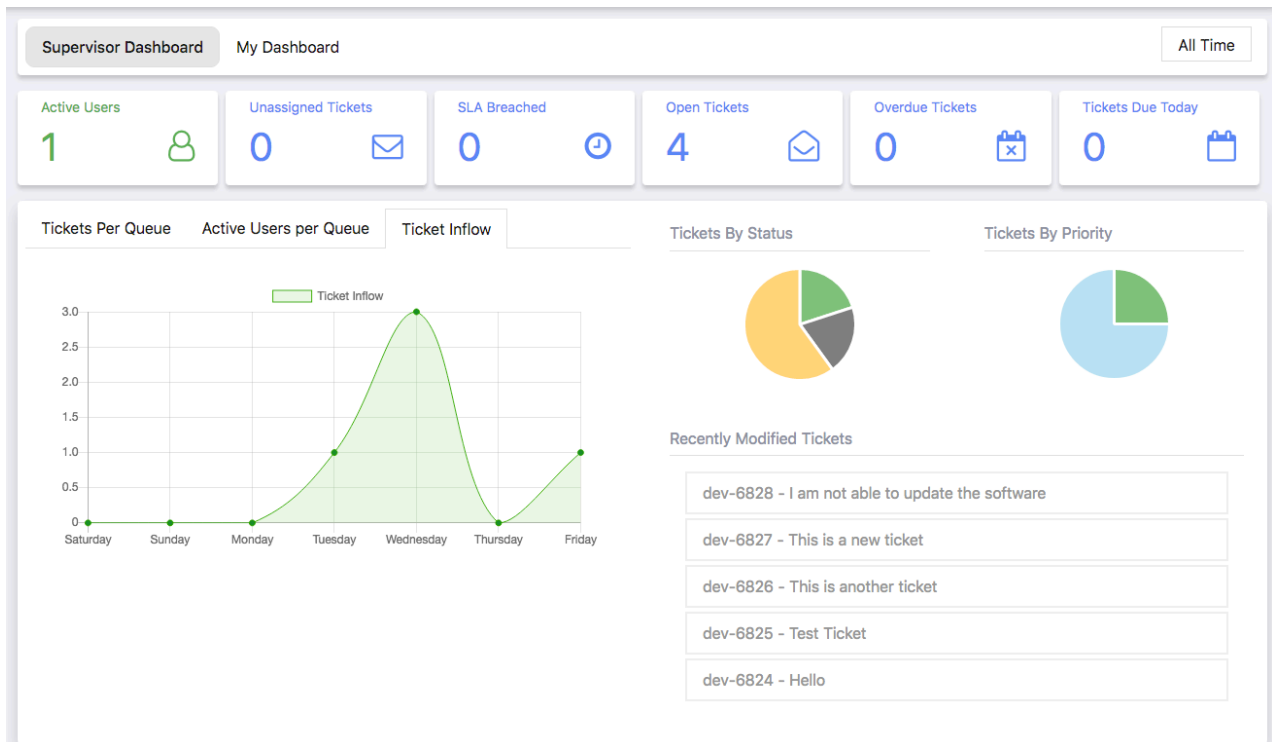
Submit

You have to define the conditions you want to check for on the ticket. This can be defined in the *clauses* section. The actions to be performed when the condition is met is to be defined in the actions section.

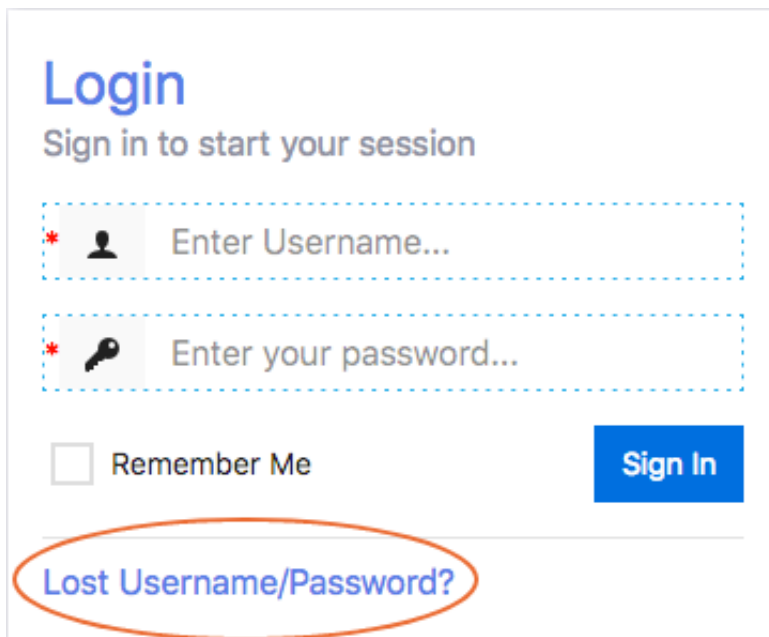
You can enable and disable the smart rule by toggling the *Active* switch. Similarly, there's another option *One Time Execution* which when enabled runs the smart rule only once on a particular ticket.

9. Dashboard

Dashboard gives you various insights about the system and can lead you to make better decisions by looking at the flow and the state of the tickets.



10. Forgot your password?



The image shows a login form with the following elements:

- Login** (blue text)
- Sign in to start your session (gray text)
- Username field: A dashed blue border containing a red asterisk, a person icon, and the text "Enter Username..."
- Password field: A dashed blue border containing a red asterisk, a key icon, and the text "Enter your password..."
- Remember Me: A checkbox followed by the text "Remember Me"
- Sign In: A blue button with white text
- Lost Username/Password?**: A blue link circled in orange, located below the Sign In button.

If you forgot your password, you can reset it on the login page by clicking on the link shown in the image.