

SOP: IT Support – Nepal/US | Ticketing via Monday.com

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1. Purpose

This SOP outlines the standardized process for managing IT support requests from Nepal and US teams using the “IT Request Board” within the *Investor Friendly CPA Workspace* on **Monday.com**. It ensures that all support tickets are logged, categorized, prioritized, and tracked efficiently to support smooth business operations and timely resolution of technical issues.

2. Scope

This procedure applies to:

- Employees requesting IT support across all departments
- IT staff responsible for tracking, addressing, and closing technical tickets
- Supervisors reviewing and ensuring resolution of support items

3. Prerequisites

- Valid user credentials for Monday.com
- Access to the **Investor Friendly CPA Workspace**
- Access to the **IT Request Board** within the workspace
- Understanding of issue classification, priority levels, and ticket workflow

4. Procedures

4.1 Accessing the IT Request Board

1. Navigate to [Monday.com](https://monday.com) and log in.
2. From the left navigation panel, select the workspace titled **Investor Friendly CPA**.
3. Click on the **IT Request Board**.
4. Confirm that the following groups (or sections) exist on the board:
 - **New Request**
 - **Working on it**
 - **Done**

4.2 Logging a New IT Support Request

1. Click the **+ Add Item** button under the **New Request** group.
2. Fill in the following fields for each new ticket:

Field	Instructions
Item	Enter a short, descriptive title for the issue. Example: "Outlook not syncing"
Description	Provide a detailed explanation of the issue including user, system, screenshots (if available), and steps to reproduce the issue
Created Date	Auto-filled by Monday.com or manually enter the request date
Priority	Select: <i>High</i> , <i>Medium</i> , or <i>Low</i> based on issue impact
Assignee	Select the IT support staff member who will handle the issue
Status	Set to <i>New</i> initially
Due Date	Estimate or assign a resolution target based on severity/SLA

3. Use the **Updates** section of the item to log any initial details or attach screenshots.

4.3 Categorizing and Prioritizing Requests

Priority Definitions:

- **High:** Business-critical issues (e.g., no internet, email outage, failed login for executives)
- **Medium:** Operational support (e.g., app installation, shared drive mapping)
- **Low:** Minor issues or non-urgent requests (e.g., screen resolution, font install)

Categorize requests appropriately and add relevant **labels or tags** if custom fields are available (optional).

4.4 Assigning and Acknowledging Requests

1. The IT Manager or lead should monitor the **New Request** column daily.
2. Assign tickets to appropriate IT personnel using the **Assignee** column.
3. Assignees must:

- Acknowledge the ticket by changing the **Status** to *Working on it*
- Leave a note in **Updates** confirming receipt and next steps
- Initiate contact with the requester if clarification is needed

4.5 Working on Tickets & Managing Lifecycle

Statuses should be updated as work progresses:

Status	Meaning
New	Unassigned and unacknowledged ticket
Working on it	Assigned and in-progress
Stuck	Blocked due to external dependency, unclear scope, or required approval
Done	Resolved and completed with or without confirmation from requester

While working:

- Mention other team members using @username if collaboration is required.
- Attach resolution notes, screenshots, or logs where applicable.

4.6 Closing the Request

1. Once resolved:
 - Change the **Status** to *Done*
 - Post a final update summarizing the fix
 - Notify the requester with an @mention for review and confirmation
2. If user confirmation is received or no follow-up is needed within 48 hours, the ticket can remain closed.

5. Conclusion

A structured ticketing process through Monday.com ensures all IT requests whether from Nepal or US teams are handled efficiently and with proper accountability. By following this SOP, the IT department can maintain a consistent support experience, respond to critical needs on time, and create transparency for all technical issues across the firm.