OldTurtle's

BizSuite

CRM & Helpdesk Dotnetnuke Extension

Administrator's Manual

Summary

1 What is BizSuite?

1.1 Helpdesk & CRM Module

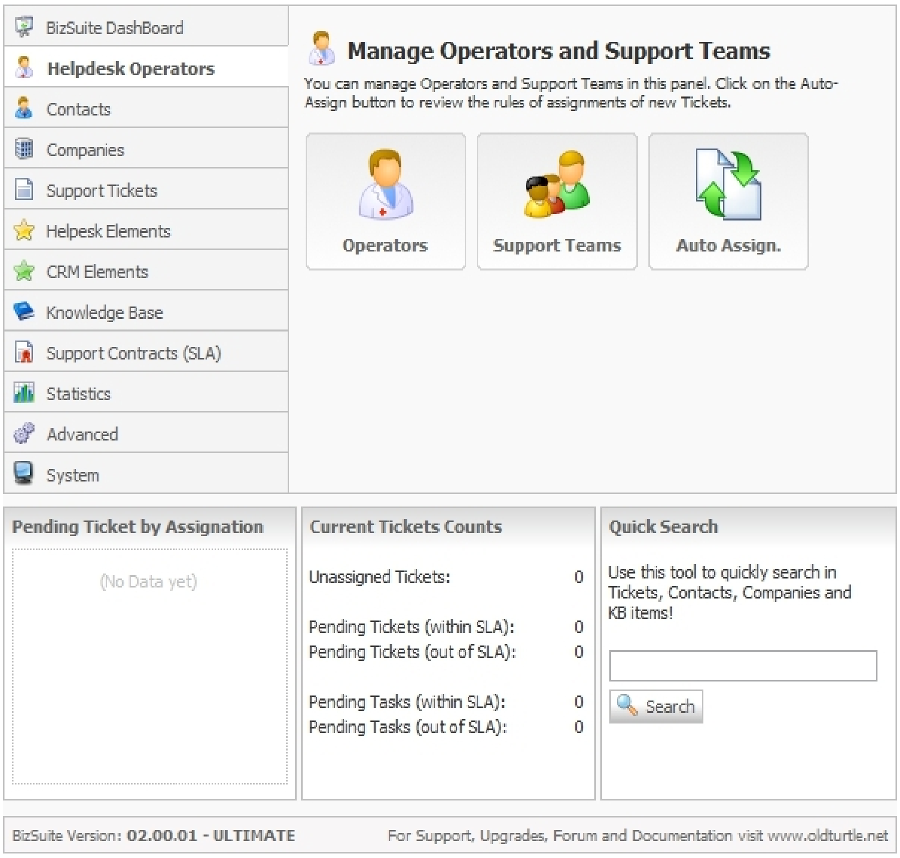
BizSuite is a module/extension for Dotnetnuke portals that manages customers relationships and support requests. It offers a requests management (Trouble Ticketing) and allow your visitors to easily create new tickets and review their requests details / status.

1.2 Dotnetnuke Portals

DotNetNuke is a popular open-source CMS software that will allow to build company websites and intranets very fast. It is written using Microsoft Asp.Net and uses Microsoft SQL as database. You can find and download your DNN installation file at www.dotnetnuke.com. It's a Free and professional tool, a must try to have a quick, stable and configurable website, and does not require programming skills!

1.3 Additional Features

We will soon provide optional extensions to the BizSuite main functionalities. Please check www.oldturtle.net for updates!



2 Installing BizSuite in your DNN Portal

2.1 Where to download Bizsuite

You can download the PA of BizSuite on www.oldturtle.net or get the Free Edition on third party websites like www.snowcovered.com (you can search for "BizSuite"). Note that you will need a valid OldTurtle.net license, even to run your Free edition, please refer to next section for more details.

2.2 Licensing System

BizSuite comes in 5 different editions and prices. You can compare the features of each edition on www.oldturtle.net. The "Freeware" edition only requires your registration and license activation, while "Light", "Standard" and "Ultimate" edition can be purchased on www.oldturtle.net under the "Purchase" menu. We also offer the complete source code package, if you need to customize the module: note that the sources are written in asp.net (visual basic) and requires medium programming skills to be modified. Please get in contact with us before you purchase the Source Package edition.

2.3 System Requirements

Please read the following notes and be sure that requirements are satisfied, before you purchase or install OldTurtle BizSuite module:

- This software consists of a Private Assembly that needs to be installed in a DotNetNuke portal. Please consider visiting www.dotnetnuke.com to download the latest version of this framework, if you do not know what DotNetNuke is. BizSuite will not run if you do not have a DotnetNuke based website.

- Database: BizSuite is tested agains SQL 2005 and 2008. BizSuite will not work on SQL 2000 based DNN portals.

- DotNetNuke supported versions: BizSuite is tested in DNN version 4.9.0 or higher and DNN version 5.0 or higher.

- You will need SuperUser / Host credentials to be able to upload and install the module PA in your DotNetNuke portal.

2.4 Running the installation Wizard

Please follow these steps to have an optimized installation of OldTurtle BizSuite modules in your portal.

1) Be sure you are running a 4.9.x (or higher) or 5.x version of Dotnetnuke, and login as Host / Super User account.

2) Navigate to the Host -> Module Definition page and click "Install New Module" from the popup menu.

3) Browse to the location where you downloaded the .zip file. The .zip file must NOT be unzipped. Click "Install New Module". Please check the previous sections to learn where to download BizSuite PA .zip file.

4) Scroll down the page and check that no errors are shown, and click on "Return" at the bottom of the page. In case of error texts, please visit www.oldturtle.net forum, check the FAQs, or use the “Contact Us” page on our website to write us about your problem.

You are now ready to place the module on your portal tabs.

2.5 Activating and Managing your Serials

Before being able to use BizSuite, you must activate the serial key that is generate in your Installation Wizard (see next section). You will need to login on www.oldturtle.net and copy/paste the serial that you will see in your installation, then click on the activation button to activate it. Once activated, the Installation Wizard will finish correctly.

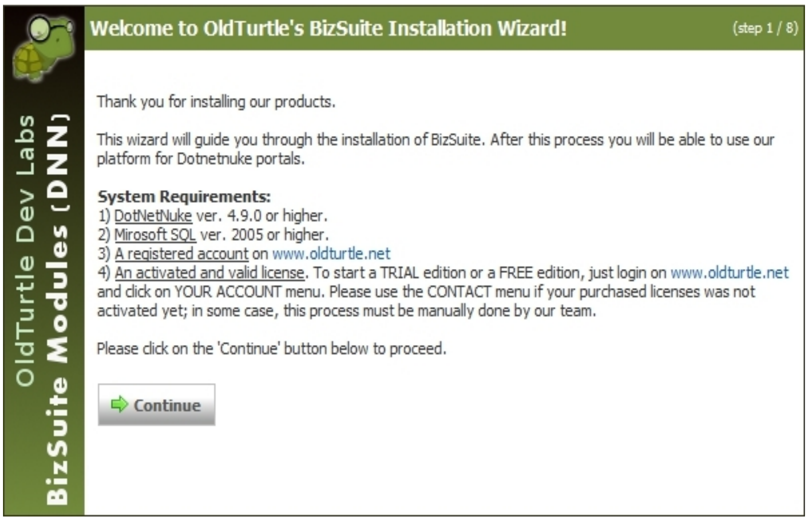
Note that each Bizsuite edition (Free, Light, Standard or Ultimate) allows you to use BizSuite in two different portals (Portal Ids) at the same time. For example, if you want to use BizSuite in three different portals, you will need two licenses. If you need BizSuite on eight portals (at the same time), you will need four editions.

This system was created to allow you to move your installation from portal to portal, for example, from test to production portals easily. You will just install BizSuite in the new portal, and activate the new serial under your account page on www.oldturtle.net.

2.6 Configuring Settings (first run)

After placing a new instance of BizSuite in your tab, the First-Run Installation wizard will begin.
This wizard was created to allow you set up the essential data to have your BizSuite running in short time.

Welcome to OldTurtle's BizSuite modules!
This is the introduction panel of the wizard. Be sure to read the System Requirements and click "Continue" to proceed.

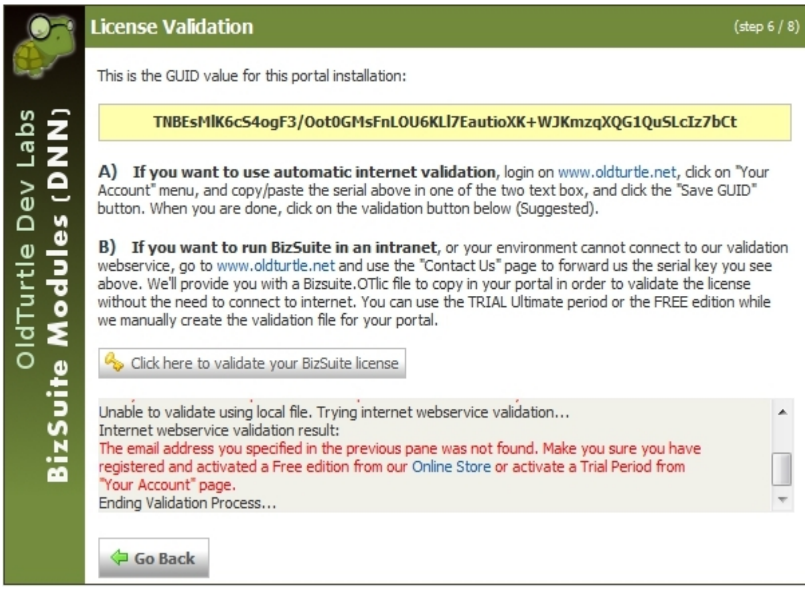


End User License Agreement
Please accept BizSuite's EULA by checking the box and click "Continue" to proceed.

Where did you get BizSuite from?
Indicate the source where you downloaded or purchased BizSuite from. This helps to complete details of your BizSuite license properly. Check one of the two options and click on "Continue" to proceed.

(Please register on OldTurtle.net!)
This panel will remind you to register on our portal to have your personal license. Note that this is required for Freeware editions as well. This panel will not appear if you have selected "I downloaded from OldTurtle.net Store" in the previous panel. Click on "Continue" to proceed.

OldTurtle Registration Email
Please type the email address you have used to register your account on www.oldturtle.net. This will tell BizSuite what license to use for this installation. If you do not have an account on www.oldturtle.net, please register now. Registration is of course free of charge. Click on "Continue" to proceed.



License Validation
In this panel BizSuite generates the serial key for this installation. Once this code is generated, it will never change for this installation. You have to use this code to validate your license; this is needed for the Freeware edition as well. Please refer to the previous section for more info on BizSuite licenses.

NOTE: if you are running your website under a firewall, or cannot connect to our licensing service, please Contact Us on our website and we will produce a special key/file to run BizSuite in your portal.

3 Helpdesk Operators

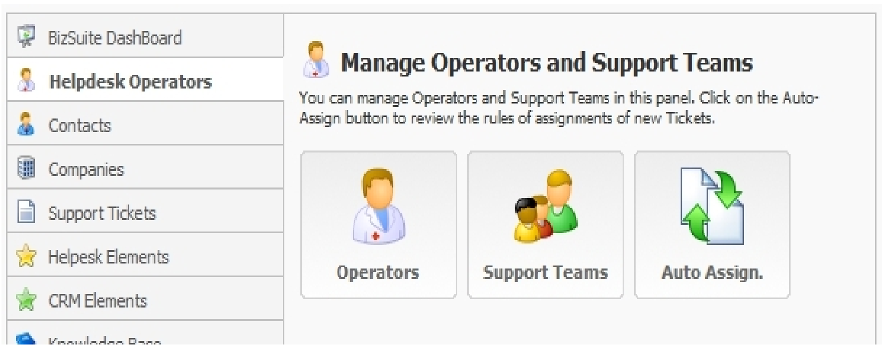
3.1 What are Helpdesk Operators?

An Operator represent a single unit of your customer support personnel. For example, an Operator can be a person that answers call in an inbound call center, or simply a techician that is sent to your customers offices in case of support needs. If your company employs 4 Operators, then you will need to create 4 Operators in your BizSuite module. Once created, those Operators will be able to access BizSuite and manage the pending support requests, as well as register new requests issued by your customers.

3.2 Portal Users for Operators

Each Operator that is created in BizSuite must be linked to an existing DNN portal users. This will allow the Operator to login to your portal and manage the support requests. Before you create a new Operator, please create a portal users for it. BizSuite will ask you what portal user will be bound to the new Operator.
Note: If you do not wish your Operators to login to your portal for some reason, simply bind Operators to unauthorized portal users (not suggested).

3.3 Creating New Operators



Make sure you have created a new DNN portal user that the new Operator will be bound to, then follow these steps to create a new helpdesk Operator:

1. Login as BizSuite Administrator and navigate to BizSuite module.
2. In the BizSuite Administration Panel, click on the "Helpdesk Operators" vertical menu button.
3. Click on the "Operators" big button in the main panel. You will navigate to the "Manage Operators" screen.
4. Click on the "New Operator" button at bottom of the page. You will navigate to the "Create New Support Operator" page.
5. In the "Linked Portal User" field, select the portal user that will be bound to this Operator.
6. Check the "Is Enabled?" check box to allow this Operator to use the module.
7. Click on the "Update" button to create the Operator.

3.4 Operators Properties and Permissions

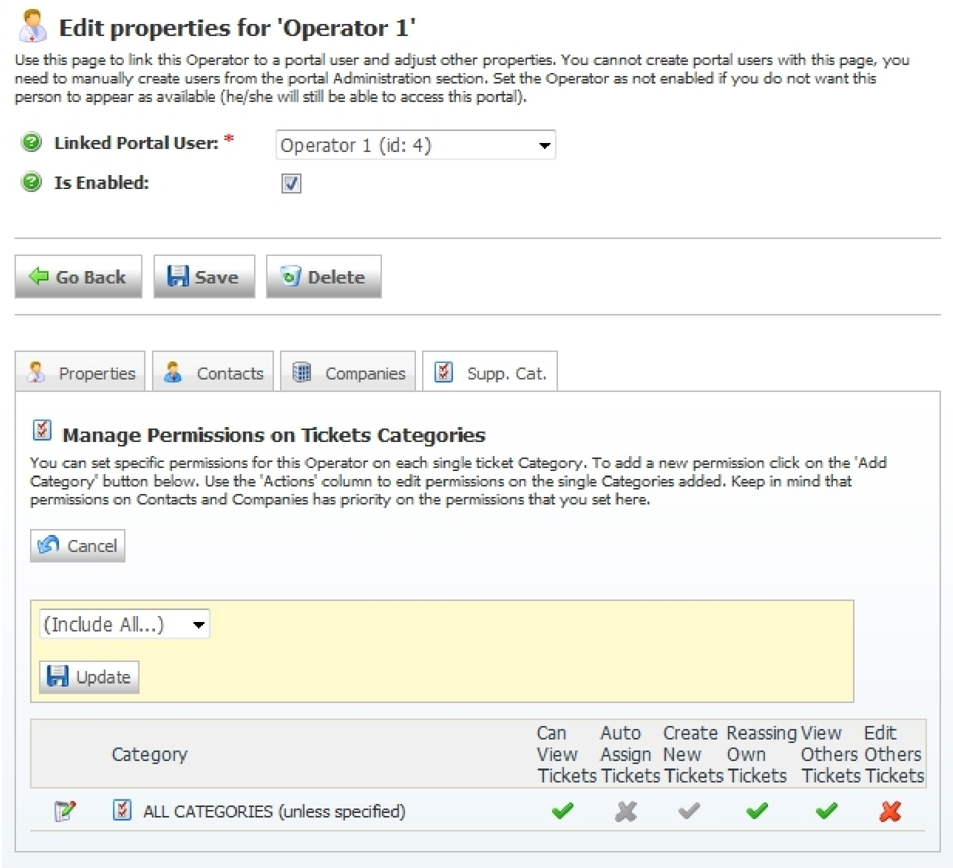
In the Operator details page you can set properties and permission for the selected operator. For the properties, please indicate:

- <u>"Can create new Tickets?"</u> If you check this box, the Operator will be able to navigate to the ticket creation page and add new support requests by customers. If you do not check this box, the Operator will only be able to manage tickets that are assigned to him (or to the support teams that this Operator is member of).

- "Can re-open closed Tickets?" If you check this box, the Operator will be able to change the status of closed tickets, set them as not closed, and allow further modifications to the ticket itself. Do not check this box if you do not want this Operator to be able to re-open closed support tickets.

- "Can delete Tickets?" If you check this box, the Operator will be able to delete a support ticket. The delete button is located at the bottom of the tickets details page (if enabled).

- "Can create new Contacts?" If you check this box, the Operator will be able to create new contacts "on the fly" from the ticket creation page. If not checked, the Operator will still be able to access the Contacts section of the module, and add new contacts from that page.



In the "Contacts", "Companies" and "Supp. Cat." tabs you can set the variuos visibility permissions that will be used to hide or show support tickets to this Operator. All the three tabs works in the same way, and will apply the same sort of permissions to the different properties of the support ticket (contact, company and/or category of the ticket). All tabs have a generic item automatically displayed on top (such as "All Contacts"), and it is used to set a permission that is used as default, when no other specific permissions are set. To add a specific permission to a specific item, for example, to a contact or to a company, just add the item to the list, by clicking the buttons "Add Contact" or "Add Company". The selected item will be added to the list and you will be able to set specific permissions that will override the default permissions, for the tickets with such properties. In details, you can set permissions for:

- "Can View Tickets" This check will display (or hide) the tickets to this Operator. For example, if this permission is not checked for the contact "John Smith", all tickets created for "John Smith" will be hidden to this Operator.

- "Auto Assign Tickets" If checked, all the tickets created by or for a specific contact, company or category, will be auto assigned to this Operator. This permission works only on specified item, not for default. Please refer to the auto assignment part for more information on the auto assignement topic.

- "Create New Tickets" If checked, the Operator will be able to create tickets for the specifc contact, company or category. For example, if this permission is not checked for the category "software support", this Operator will not be able to create new ticket for that category.

- "Reassign Own Tickets" If checked, the Operator will be able to reassign the ticket for the specific contact, company or category to another Operator or Support Team. If checked in the default item, but not checked for example for the company "James Hotels & Co", the Operator will be able to reassign all of his tickets, but not the tickets for the "James Hotels & Co" company.

- "View Others Tickets" If checked, the Operators will be able to view the tickets that are not assigned to him. Note that the tickets assigned to other Operators, if visible, will be rendered in read only mode. To be able to edit tickets assigned to other Operators, please check the next permission.

- "Edit Others Tickets" If checked, tickets assigned to other Operators will be visible and editable. The Operator will be able to manage and interact with tickets assigned to other Operators. For example, if this permission is checked for the contact "John Smith", and not by default, the tickets for "John Smith" will be visible and editable, even if not assigned directly to this Operator. Since is not set by default, all other tickets will not be editable.

3.5 Auto assignment of New Tickets

With the "Auto Assign Tickets" permission discussed in previous chapter, you can easily define rules to auto assign incoming tickets to the correct Operator (or support team). Auto assignment can be set up considering ticket Contact, Company or Category; remember that the rules set on a specific Contact will override the rules set on a specific Company, and the rules set for a specific Company will override the rules set for a specific Category. Please consider the table below for an example:

Auto Assignment setting for Operator James Brown:
Contacts: Autoassignment set for Contact1 and Contact2.
Companies: no autoassignment set.
Categories: Autoassignment set for "Software Support" category.

Case 1: New Ticket by Contact1. This ticket will be auto assigned to Operator James Brown, since it has been directly specified in the permissions for Contacts. The company of the customer or the ticket category do not matter.

Case 2: New Ticket by Contact3. This contact has no specific settings for Operator James Brown. But, if the ticket's category is "Software Support", it will be auto assigned to Operator James Brown as well.

Case 3: New Ticket by Contact4, for the category "Product XYZ Support". This ticket will be not assigned to Operator James Brown, since Contact4 has not directly been specified in his permissions, and the category has not directly been specified in his permissions.

3.6 Removing and Disabling Operators

If you need to delete or disable an Operator, please follow these steps:

1 Login as BizSuite Administrator and navigate to BizSuite module.
2 In the BizSuite Administration Panel, click on the "Helpdesk Operators" vertical menu button.
3 Click on the "Operators" big button in the main panel. You will navigate to the "Manage Operators" screen.

4 Click on the edit icon of the Operator you want to delete or disable.

In the Operators Details page, you have two options: delete or disable the Operator.
If you want to disable the Operator, unchecked the "Is Enabled?" box and click on "Save". Disabled Operators will not be visible in the Helpdesk module. If you want to only deny access to the module to the selected Operator, please set his portal user as "Unauthorized" instead. This can be done as usual in the DNN portal Administration section.
If you want to completly delete this Operator, click on the "Delete" button. Note that you will not be able to delete an Operator that has been involved in tickets or tasks previously. This check has been created in order to keep activity history. Please remove all the Operator's activity if you still need to delete the Operator. Note that if you delete the Operator, the portal user will not be deleted or modified.

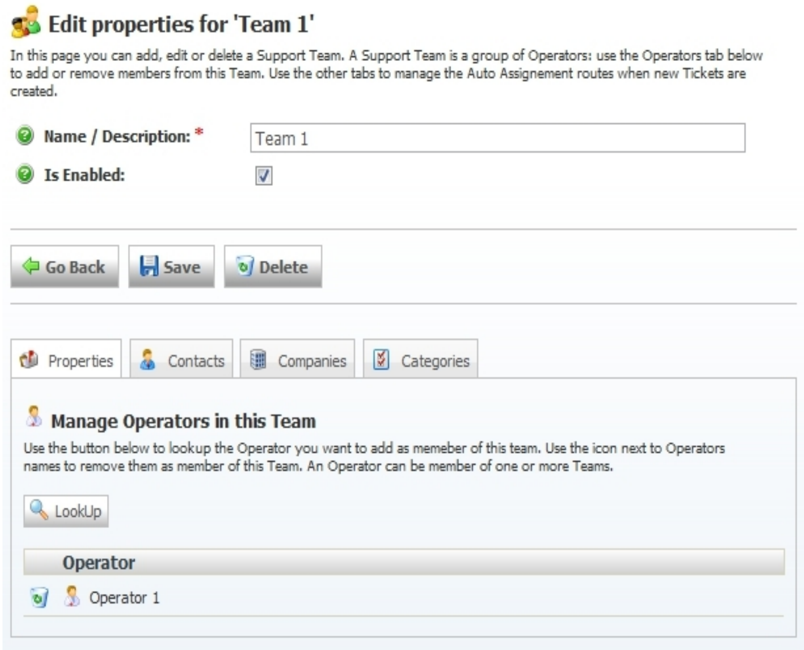
4 Support Teams

4.1 What are Support Teams?

A Support Team is basically a group of Helpdesk Operators. You can use Support Teams to regroup your personnel by type of support, departments, products, level of support given or any other logic that more meets your customer support scenario.
Each Helpdesk Operator can be included in none, one or more Support Teams, just like you would do with portal roles of Dotnetnuke. A Support Team can be used for Tickets permissions settings and Ticket auto-routing, in the same way of Operators; when a ticket permission or auto-routing rule is set, all the Operators included in the Support Team will benefit of that permission, and will be able to manage the Tickets that are assigned to the Team. Tickets assigned to the Team are, in other words, shared among the components of the Team itself.

4.2 Creating New Support Teams

Please follow these steps to create or manage your Support Teams:



1. Login as BizSuite Administrator and navigate to BizSuite module.
2. In the BizSuite Administration Panel, click on the "Helpdesk Operators" vertical menu button.
3. Click on the "Support Teams" big button in the main panel. You will navigate to the "Manage Support Teams" screen.
4. Click on the "Create Team" button at bottom of the page. You will navigate to the "Create New Support Team" page.
5. In the "Name/Description" field, type a name that describe this Team.
6. Check the "Is Enabled?" check box to allow this Team to be visible in the module.
7. Click on the "Update" button to create the Team.

4.3 Adding Operators to a Team

To add Operators to the Support Team, click on the "LookUp" button in the "Properties" panel. Select the Operator you want to add from the drop down list, and click the button. The Operator will now be listed in the list of linked Operators. To remove a linked Operator, simply click on the remove icon next to the Operator in the list.

4.4 Support Team Permissions

You can set permissions for your Teams in the same exact way you set them for your Operators. Please remember that the permissions settings set for the specific Operator will always override the settings you configure for the Teams that the Operator is member of.

In the Support Team details, please indicate:

- "Can create new Tickets?" If you check this box, the Team (all of its members) will be able to navigate to the ticket creation page and add new support requests by customers. If you do not check this box, the Team (all of its members) will only be able to manage tickets that are assigned to it.

- "Can re-open closed Tickets?" If you check this box, the Team (all of its members) will be able to change the status of closed tickets, set them as not closed, and allow further modifications to the ticket itself. Do not check this box if you do not want this Team's members to be able to re-open closed support tickets.

- "Can delete Tickets?" If you check this box, the member of this Team will be able to delete a support ticket. The delete button is located at the bottom of the tickets details page (if enabled).

- "Can create new Contacts?" If you check this box, the members of this Team will be able to create new contacts "on the fly" from the ticket creation page. If not checked, they will still be able to access the Contacts section of the module, and add new contacts from that page.

In the "Contacts", "Companies" and "Supp. Cat." tabs you can set the variuos visibility permissions that will be used to hide or show support tickets to this Team's members. All the three tabs works in the same way, and will apply the same sort of permissions to the different properties of the support ticket (contact, company and/or category of the ticket). All tabs have a generic item automatically displayed on top (such as "All Contacts"), and it is used to set a permission that is used as default, when no other specific permissions are set. To add a specific permission to a specific item, for example, to a contact or to a company, just add the item to the list, by clicking the buttons "Add Contact" or "Add Company". The selected item will be added to the list and you will be able to set specific permission that will override the default permissions, for the tickets with such properties. Remember that the settings and permissions of specific Operators will always override the settings and permissions that you set for the Teams that the Operator is member of. In details, you can set permissions for:

- "Can View Tickets" This check will display (or hide) the tickets to these Team's members. For example, if this permission is not checked for the contact "John Smith", all tickets created for "John Smith" will be hidden to this Team.

- "Auto Assign Tickets" If checked, all the tickets created by or for a specific contact, company or category, will be auto assigned to this Team. This permission works only on specified item, not for default. Please refer to the auto assignment part for more information on the auto assignement topic.

- "Create New Tickets" If checked, the members of this Team will be able to create tickets for the specifc contact, company or category. For example, if this permission is not checked for the category "software support", this Team will not be able to create new ticket for that category.

- "Reassign Own Tickets" If checked, Team members will be able to reassign the ticket for the specifc contact, company or category to another Operator or Support Team. If checked in the default item, but not checked for example for the company "James Hotels & Co", members will be able to reassign all of his tickets, but not the tickets for the "James Hotels & Co" company.

- "View Others Tickets" If checked, members of this Team will be able to view the tickets that are not assigned to them. Note that the tickets assigned to other Operators or other Teams, if visible, will be rendered in read only mode. To be able to edit tickets assigned to other Operators or Teams, please check the next permission.

- "Edit Others Tickets" If checked, tickets assigned to other Operators or Teams will be visible and editable. Team members will be able to manage and interact with tickets assigned to other Operators. For example, if this permission is checked for the contact "John Smith", and not by default, the tickets for "John Smith" will be visible and editable, even if not assigned directly to these members. Since is not set by default, all other tickets will not be editable.

4.5 Auto assignment of New Tickets

With the "Auto Assign Tickets" permission discussed in previous chapter, you can easily define rules to auto assign incoming tickets to the correct Support Team. Auto assignment can be set up considering ticket Contact, Company or Category; remember that the rules set on a specific Contact will override the rules set on a specific Company, and the rules set for a specific Company will override the rules set for a specific Category. Please consider the table below for an example:

Auto Assignment setting for Team "Department 1A"
Contacts: Autoassignment set for Contact1 and Contact2.
Companies: no autoassignment set.
Categories: Autoassignment set for "Software Support" category.

Case 1: New Ticket by Contact1. This ticket will be auto assigned to the Team "Department 1A", since it has been directly specified in the permissions for Contacts. The company of the customer or the ticket category do not matter.

Case 2: New Ticket by Contact3. This contact has no specific settings for Team "Department 1A". But, if the ticket's category is "Software Support", it will be auto assigned to Team "Department 1A" as well.

Case 3: New Ticket by Contact4, for the category "Product XYZ Support". This ticket will be not assigned to Team "Department 1A", since Contact4 has not directly been specified in his permissions, and the category has not directly been specified in his permissions.

4.6 Removing or Disabling Support Teams

If you need to delete or disable a Support Team, please follow these steps:

1. Login as BizSuite Administrator and navigate to BizSuite module.
2. In the BizSuite Administration Panel, click on the "Helpdesk Operators" vertical menu button.
3. Click on the "Support Teams" big button in the main panel. You will navigate to the "Manage Operators" screen.
4. Click on the edit icon of the Team you want to delete or disable.

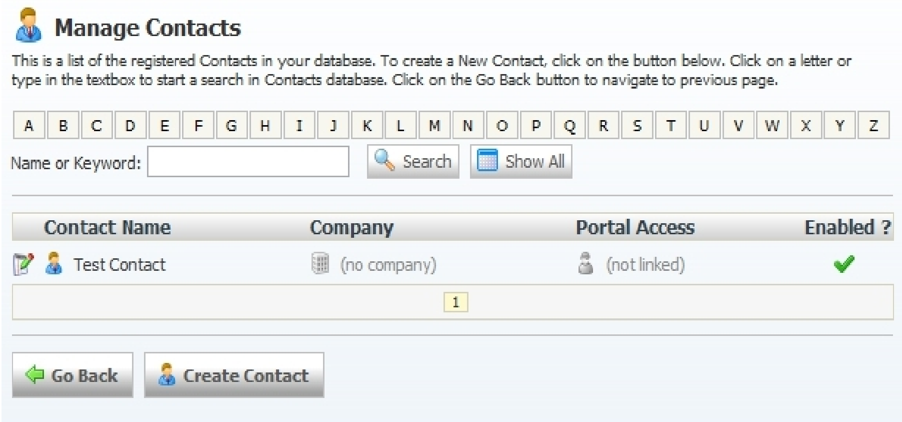
In the Support Teams Details page, you have two options: delete or disable the Team.
If you want to disable the Team, unchecked the "Is Enabled?" box and click on "Save". Disabled Teams will not be visible in the Helpdesk module. If you want to only deny access to the module to the members of the selected Team, please set its Operators portal user as "Unauthorized" instead. This can be done as usual in the DNN portal Administration section.
If you want to completly delete this Support Team, click on the "Delete" button. Note that you will not be able to delete a Support Team that has Operators linked to it. Please remove all the Operators linked to this Team if you still need to delete the Team.

5 Contacts

5.1 What are Contacts?

A Contact represents a person that is typically your customer. You can store information about your Contacts, such as Addresses and Attachments, and Contacts can be linked to Companies (see "Companies" for more informations). Contacts are also the persons that benefits of support and assistance from your Operators. Optionally, you can bind your Contacts to portal users, so they can log in into your portal and interact with BizSuite module itself, for example, to issue new support requests or manage their pending support requests.

5.2 Creating New Contacts



Please follow these steps to create a new Contact. Note that if you want to bind the new Contact to a portal user, the portal user should be created first (as usual, in the Administrator of DNN menu).

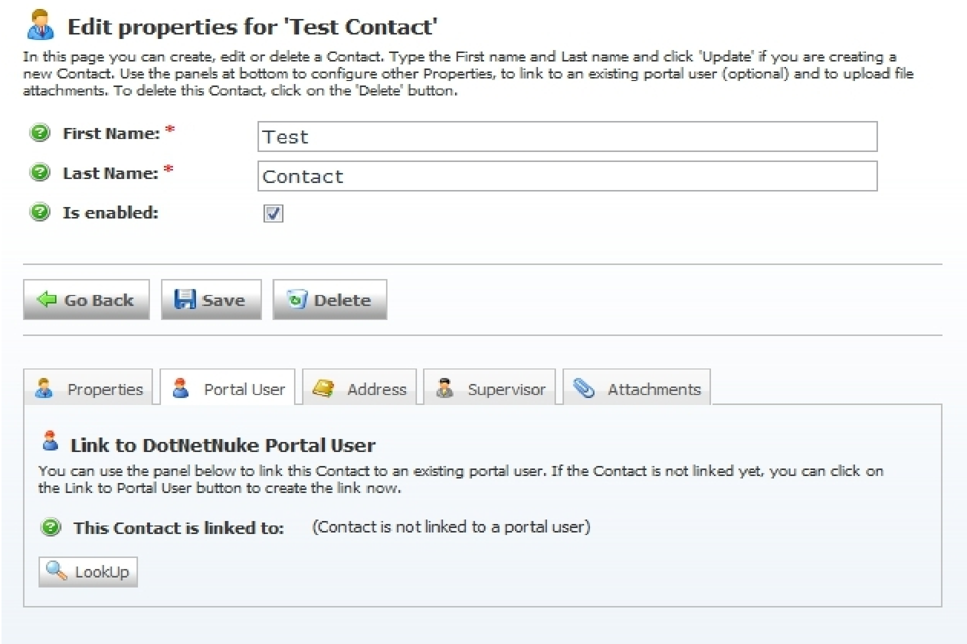
1 Login as BizSuite Administrator or Operator and navigate to BizSuite module.
2 In the Dashboard, click on the "Contacts" vertical menu button.
3 Click on the "Contacts" big button in the main panel. You will navigate to the "Manage Contacts" screen.
4 Click on the "Create Contact" button at bottom of the page. You will navigate to the "Create New Contact" page.
5 In the "First Name" and "Last Name" fields, type the information about your new Contact.
6 Check the "Is Enabled?" check box to allow this Contact to be visible in the module.
7 Click on the "Update" button to create the Contact.

5.3 Contacts and DNN portal users

In the "Portal User" tab of the Contact Details page you can add a link from this Contact to an existing portal user of Dotnetnuke. If the linked portal user accesses BizSuite, all the support Tickets opened with that user will appear as opened by this Contact. This is usefull if you need to store more information on your helpdesk customers or if you want to have statistics on your customers.
To add a link to a portal user, click on the "LookUp" button, select a portal user and click on the green icon next to his name.

5.4 Company Supervisor

In the "Supervisor" tab, you can set a Contact to be a Supervisor for his Company. A supervisor is a person that has a global view on the support requests create by all the Contacts of the Company he his linked to. In fact, a Supervisor will be able to view his tickets, and all the tickets of his collegues. Note that the Supervisor has a read-only access to the tickets of his Company. You can have only one Supervisor per single Company.



5.5 Deleting or Disabling Contacts

Please follow these steps if you want to disable or delete a Contact. If a Contact is subject of one or more support tickets, you will not be able to completly delete it from BizSuite, as the item is needed for history logs and statistics:

1 Login as BizSuite Administrator or Operator and navigate to BizSuite module.
2 In the Dashboard, click on the "Contacts" vertical menu button.
3 Click on the "Contacts" big button in the main panel. You will navigate to the "Manage Contacts" screen.
4 Find the Contact you wan to edit or delete, and click on the green icon next to its name.

In the Contact details page, uncheck the "Is Enabled?" box if you want to disable this Contact, or click on the "Delete" button if you want to remove this item completly. Note that if there is a portal user linked to this Contact, it will not be changed or deleted.

5.6 Quick Creation from New Ticket page

Operators can create a new Contact quickly from the Ticket creation page. This functionality has been added to allow Operators to fast enter a ticket (for example, a call received by phone), without the need to create a Contact first in the Contacts management.
While logged as Operator, in the Ticket creation page, click on "Create New Contact" button. A "Create New Contact" page will be displayed. Here, you can input the basic details for a new Contact, and link it on a portal user, if needed. Click on the "Save" button at the bottom of the page, and the new Contact will be created; the Ticket that you are creating will be automatically linked to the new Contact.
The new Contact will appear normally in the Contacts Management, so you can add other details and properties to it in a later time. Note that the Operator must have the "Can Create Contacts?" property enabled, to be able to see the "Create New Contact" button in the Ticket creation page.

Companies

6.1 What are Companies?

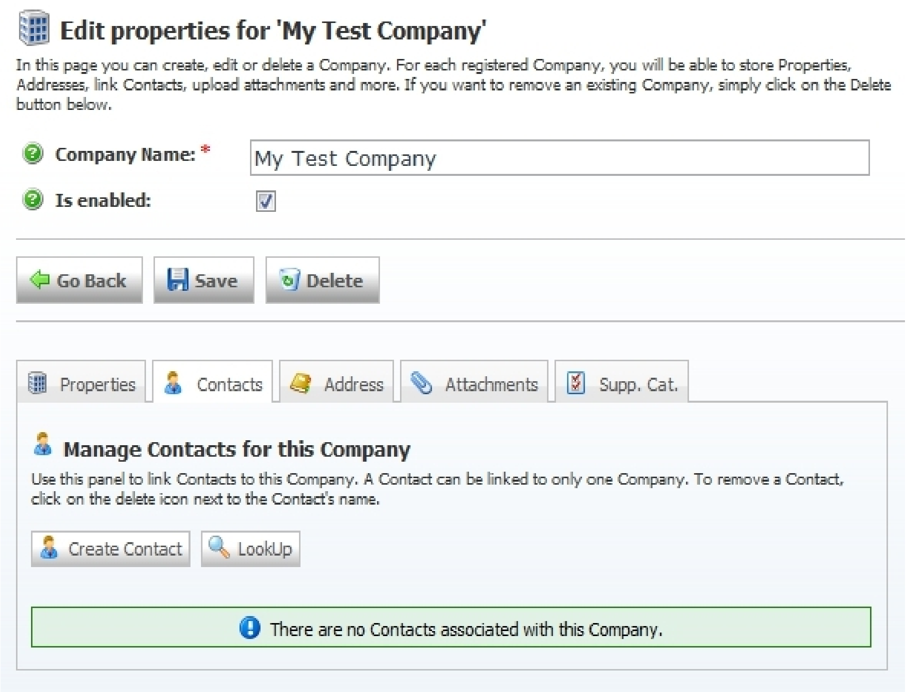
Companies are used to group Contacts by the business they work in. You can use Companies to give global permissions and access to the Contacts within the Company, without the need to set those permissions to each single Contact. You can also store additional data about your customer Companies in their property pages; optionally, SLA Contracts can be set to a Company, so that its Contacts will have those Contracts applied to their Tickets automatically.
You can also just record Companies without linking Contacts, if you only want a Company database with properties, addresses details and attachments.

6.2 Creating New Companies

Please follow these steps to create a new Company:

1. Login as BizSuite Administrator or Operator and navigate to BizSuite module.
2. In the Dashboard, click on the "Companies" vertical menu button.
3. Click on the "Companies" big button in the main panel. You will navigate to the "Manage Companies" screen.
4. Click on the "Create Company" button at bottom of the page. You will navigate to the "Create New Company" page.
5. In the "Company Name" field, type the information about your new Company.
6. Check the "Is Enabled?" check box to allow this Company to be visible in the module.
7. Click on the "Update" button to create the Company.

When you will click on the "Update" button, a "Property" pane will be shown at bottom, and you will be able to register basic data about the new Company, such as its main telephone number or website.



6.3 Linking Contacts into Companies

In the "Contacts" panel you can bind Contacts to this Company. Contacts can be created in this page ("Create New Contact" button) or already existing Contacts ("LookUp" button). Note that a Contacts can be bound to a one Company only at the same time.
You can remove the bound Contacts by clicking on the delete icon next to its name, or navigate to the Contacts details by clicking on the magnifier icon next to its name. Note that when you remove a link to a Contact, the Contact will not be modified or deleted.

6.4 Companies and Support Categories

In the "Support Categories" pane it is possible to allow or deny the creation of support tickets for the support Categories that were created. Use this functions if you want a specific Company to be able to open new Tickets for some categories only. Simply click on the green V and red X icon next to the category name to allow or deny access; this permission automatically replicates on the category's sub-categories, if present.

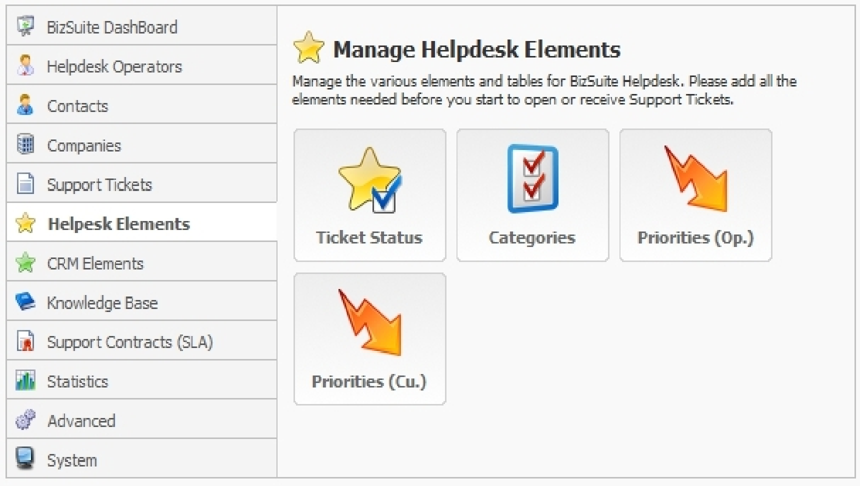
6.5 Removing or Disabling Companies

Please follow these steps if you want to disable or delete a Company. If a Company is subject of one or more support tickets, you will not be able to completly delete it from BizSuite, as the item is needed for history logs and statistics. Also, you cannot delete Companies that have Contacts bound to it: remove the Contacts bindind first.

1. Login as BizSuite Administrator or Operator and navigate to BizSuite module.
2. In the Dashboard, click on the "Companies" vertical menu button.
3. Click on the "Companies" big button in the main panel. You will navigate to the "Manage Companies" screen.
4. Find the Contact you wan to edit or delete, and click on the green icon next to its name.

In the Company details page, uncheck the "Is Enabled?" box if you want to disable this Company, or click on the "Delete" button if you want to remove this item completly.

7 Helpdesk Elements



7.1 Ticket Status

The Status of the support Ticket indicates its level of progression toward a solution. BizSuite creates three tickets Status for default:

"<u>Open</u>": the typical Status for new Tickets, assigned automatically upon creation.

"<u>In Progress</u>": this is usually set by Operators to indicate that the work for a solution has started.

"<u>Closed</u>": used to indicate that the work by support staff has terminated.

You can add your custom Ticket status to the list, and use them as you wish. For example, you could add a "Waiting Customer" or "Canceled by Customer" Status. You can also modify the default three status of BizSuite, but remember that you need to have a default status for incoming tickets and a closed status to indicate that the ticket is no longer active.

To create a new Ticket Status:

1. Login as BizSuite Administrator.
2. In the Administration Panel, click on "Helpdesk Elements". Then click on the "Status" big button in the middle of the page.
3. In the "Manage Tickets Status" page, click on the "Create Status" button or click on the edit icon next to an existing Status if you want to modify it.

In the yellow panel that appears under the Status list, please adjust the values as follow:

"<u>Status Description</u>": This is basically the name for the Ticket Status.

"<u>Enabled ?</u>": Uncheck this box to hide the Status from the module temporary.

"<u>Default for New Tickets ?</u>": You can have only one default for new ticket, and this is the status that will automatically set by BizSuite when new tickets are created.

"<u>Is Closed Status ?</u>": Status with this flag checked will indicate that the Ticket is closed and no longer actions by Operators or Customers is accepted. You can have more than one closed Status items.

"Icon for this Status": Simply select the color of the icon for this Status.

Click on the "Update" button to accept the changes. Note that you can use the arrows in the Status list to change the order with the Status will be presented in the module.

7.2 Ticket Categories

You can use Tickets Categories to regroup the support Tickets by the subject of the support needed. For example, you could group the Tickets for product or service sold or by type (for example "Sales", "Generic Support", "Quote Request"). You can create three levels of sub categories, to further regroup your support Tickets.

To create a new Ticket Category:

1. Login as BizSuite Administrator.
2. In the Administration Panel, click on "Helpdesk Elements". Then click on the "Categories" big button in the middle of the page.
3. In the "Manage Tickets Categories" page, click on the "Create Category" button or click on the edit icon next to an existing Status if you want to modify it.

In the creation page, please specify:

"Category Description": this is basically the text that describes this Category.

"Is Enabled ?": uncheck this box if you want to hide this category (and all of its sub category) from the system temporary.

"Parent Category": Use this control to set a Parent for the Category, so that you can build your support Categories tree. Leave the selection on "Root", if this Category is needed to be at the first level.

"Default Deny to Companies": check this box if you want to hide this Categories to all your Companies, unless this is directly specified in its permissions.

Click on the "Save" button to accept the changes.

All support Categories are subjects to permissions that are specified in Operators, Teams, Contacts and Companies details pages. You can deny the permissions to use one or more categories to one or more "actors" in the system, as well as use the Category of tickets to auto-assign the Ticket upon creation (see "Operators" and "Teams" chapters for instructions on auto assignment).

7.3 Ticket Priorities

Priorities indicate the level of urgency for the support Tickets. Higher priority tickets would be handles first by your support Operators. BizSuite handles both the priority level that is "suggested" by the customer, and the "official" level of priority that is set by your helpdesk personnel. You can define different priorities for the two types:

To create a new Priority item:

1. Login as BizSuite Administrator.
2. In the Administration Panel, clik on "Helpdesk Elements". Then click on the "Priorities Op." to manage the Priorities elements (operator's side) or click on the "Priorities Cu." to manage the Priorities elements (customer's side).
3. Click on the "Create Priority" button.

In the yellow pane under the list, please specify:

"Property Description": type the text that will describe the priority.

"Is Enabled ?": uncheck this box if you need to hide this priority from the system temporary.

"Default for New Tickets ?": check this box if you want this priority to be used as default for incoming tickets. Note that you can have only one default for Operators Priorities and only one for Customer Priorities at the same time.

Click on the "Save" button to accept the changes. Use the arrows icons in the list to change the order of visualization of the Priorities in the system.

8 CRM Elements

8.1 Addresses

You can store information about Addresses for both your Contacts and Companies. BizSuite supports more than a generic address, and you can manage the type of Addresses that can be stored.

To manage the Address types:

1 Login as BizSuite Administrator
2 In the Administration Panel, click on "CRM Elements". Then click on the "Addresses" big button on the central panel.

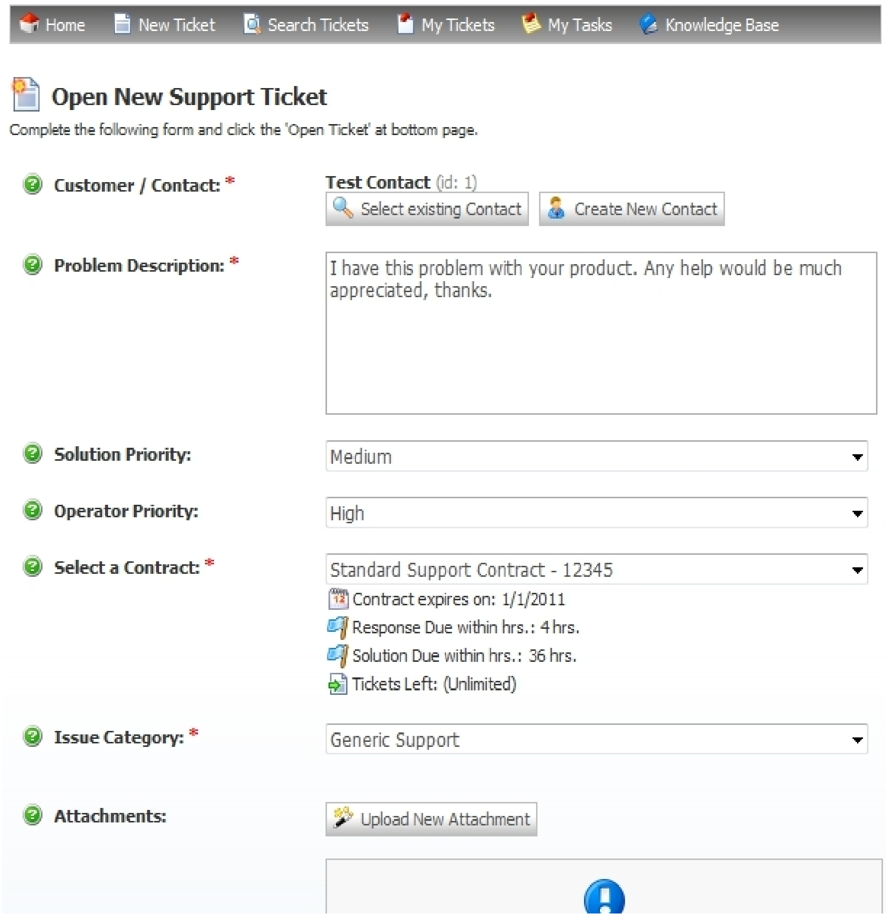
In the "Manage the Types of Address" page you can see the existing types of Addresses. To edit an element, click on the icon next to its name. To create a new element, click on "Create Address" button.
In the "Description" field, type a name for this type of address, for example "Generic" or "Main HQ" or "Stocks". Click on the "Save" button to accept the changes.
Note that you can hide this type of Address by unchecking the "Is Enabled ?" box, or delete this type by clicking on the "Delete" button at bottom of the page.

9 Support Tickets

9.1 What are Support Tickets?

A support ticket represents a request for help or information from your customers. For example, support tickets are created when a customer have a problem with one of your product or services after sale. Tickets resolution is work of your support Operators, who will take actions and communicate with the customer until the ticket is solved. Administrators can display statistics on ticket solutions and timing to have a picture of the overall level of the support given.

9.2 Creating New Support Tickets



Tickets can be created in three ways: by Customers that are visiting your website, by your Operators and by BizSuite's POP3 mailbox utility.

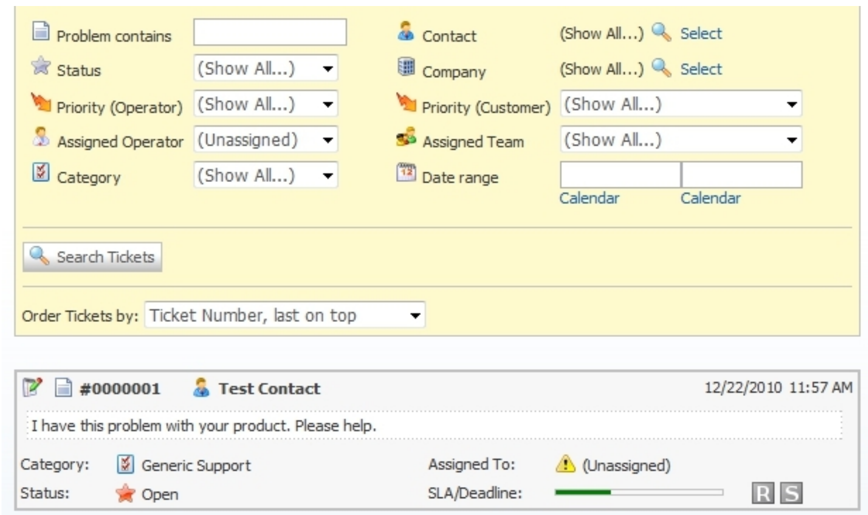
<u>Tickets created by Customers</u>:
You can set BizSuite module (and page) to be accessible to registered user only or also to unregistered users, by using the normal DNN permissions settings. If you set the module to be accessed to registered users only, the tickets will be available for review to your customers, when they will navigate to the module after ticket submission. If you allow unregistered users to submit tickets, only support staff will be able to manage them. Also, when an unregistered user will create a new Tickets in Bizsuite, the module will automatically ask for basic information, for example First Name and Last Name of the customer.
By using the "Visualization" preferences, Administrators can set what information will be asked to the customer that is submitting the ticket.

To create a new ticket as Customer, follow these easy steps:
1 Navigate to the BizSuite Helpdesk page.
2 Click on the "New Ticket" button.
3 Fill in the required fields and click on the button at the bottom of the page.
4 If the customer is a registered user, he will be able to review his tickets via the "Review Tickets" button. If the customer is an unregistered user, he will wait for communication from your Operators.

Tickets created by Operators:
Operators can add new Tickets in the system and will need to indicate which Contact will benefit from it. Usually, Operators will add Tickets after receiving a generic support request via email or telephone from customers. Operators will be able to quick create a new Contact without leaving the Ticket creation page, to save time.
To create a new ticket as Operator, follow these easy steps:
1 Login as Operator and navigate to the Operators Dashboard page.
2 In "My Dashboard" page, click on the "New Ticket" button.
3 Select an existing Contact by clicking on the "Select Existing Contact" or click on the "Create New Contact" if the new ticket is for a customer that does not exist in the database yet.
3 Fill in the required fields and click on the button at bottom of the page. Auto assignment information will appear on the confirmation page, if rules of auto assignment are found. This new Ticket will now appear in the Operators ticket search (if visible) and in the "Review Tickets" section of the Contact that was selected or created, if Contacts can access BizSuite module.

Tickets created by POP3 mailbox tool:
Please refer to the "POP3 email parsing" chapter for more information.

9.3 Searching for Tickets



To search the Tickets database when logged as Administrator, please follow these steps:

1 Login as Administrator of BizSuite and navigate to the BizSuite module.
2 Click on the "Support Tickets" in the vertical menu.
3 Click on the "Search Tickets" big button, and you will navigate to the "Ticket Database" page.
4 Refer to the next section on how to use the searching tools for Tickets.

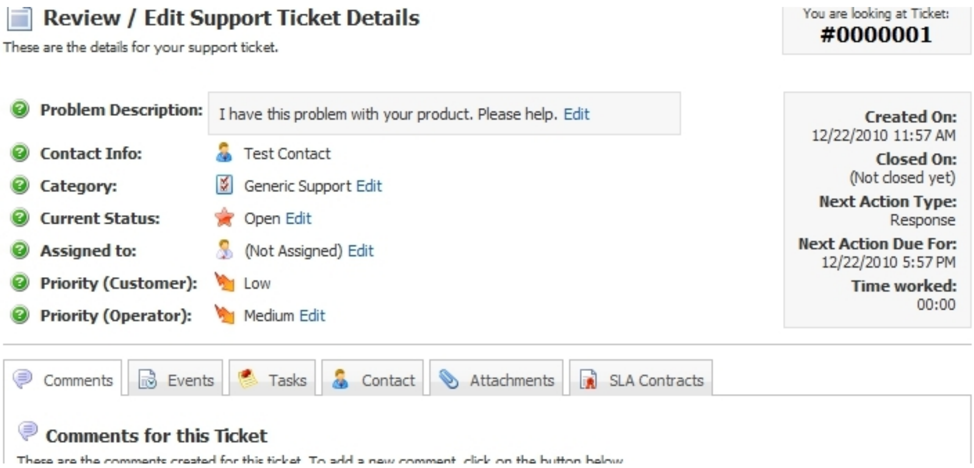
To search the Tickets database when logged as Operators, please login as BizSuite Operator and use one of the following options:

1 In "My Dashboard" page, click on the "My Tickets" button to have a pre-filtered list of tickets that are currently assigned to the Operators, or
2 In "My Dashboard" page, use the "My Recents" list of items to display the latest tickets with activity by this Operator, or
3 In "My Dashboard" page, use the "Quick Search" tool to search Tickets by number, or
4 In "Support Tickets" page, use the big button "Search" to access the search page for tickets, or
5 In "Support Tickets", use the big button "My Tickets" to have a pre-filtered list of tickets that are currently assigned to the Operator.

9.4 Tickets Search Results

When you search for tickets, results are shown as a list of boxes, one for each Ticket found. Boxes give many information about the Ticket properties.
In the first line, you can see the "Edit" icon, the number of the Ticket and the date of ticket creation (top-right corner). Under the first line, you can see the description of the problem. Under the description you can see the Category, Status, Assignment and SLA information about the Ticket. Note that the "R" (response) and "S" (solution) icon will be red and/or flashing if the Ticket is Out of SLA. Please refer to the Contracts and SLA section for more information about this.

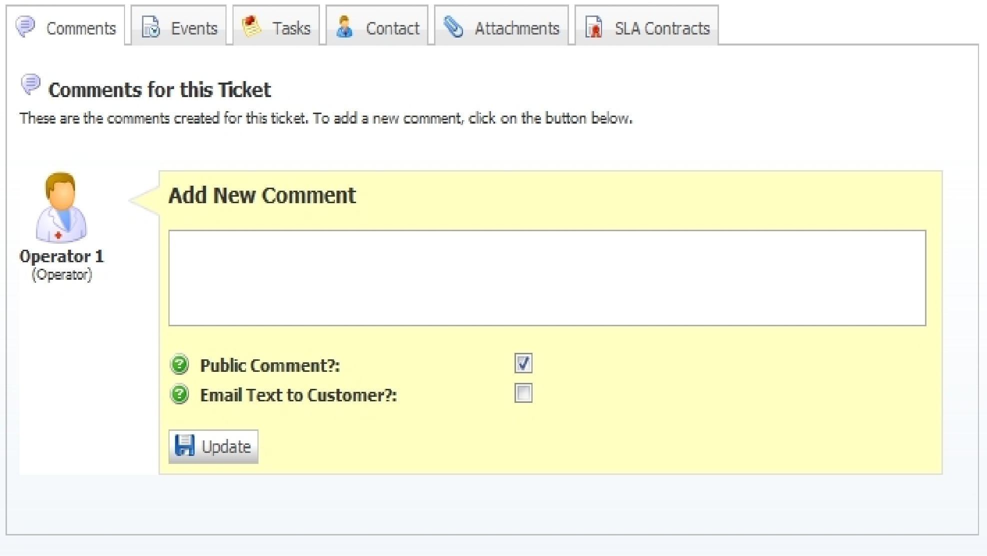
9.5 Editing Tickets



Clicking on the Edit icon of a Ticket box in the Ticket search result will display the "Review / Edit Support Ticket" page. In this page, both Customers and Operators can change the details of the Ticket as well as add new content, such as Attachments or Comments. Administrators can set the fields that can be edited from the "Visualization" menu, for both Customers and Operators.
To edit an information of the Ticket, click on the "Edit" blue link next to its value, for example, click on the "Edit" button next to the "Open" Status of a Ticket to be able to set its new Status. If the "Edit" blue link is not visible, it means that the information cannot be changed at this time by the currently logged user.
On the right pane, this page displays information about the creation date and the SLA levels (please refer to the Contracts and SLA section for more information).
At the bottom of the page, various tabs contain more details about the Ticket, such as the Events tab, that is a log of the actions that occurred since its creation. In the Attachments tab, Operators and Customers can upload new files to give more details on the problem or on its resolution.

9.6 Comments

Comments are used to allow a persistent communication between Operator and the customer. You can see all the "chat log" in this panel, as well as add a new message. According to the enabled Notifications (see the Notification section for more details), an email will be sent to the Operator when the Customer adds a new Comment, and an email will be sent to the Customer when an Operator adds a new Comment and check the "Email to Customer ?" checkbox.



10 Tasks

10.1 What are Tasks?

Tasks are activities that are needed to be completed in order to achieve the resolution of a Ticket. Operators can create Tasks and assign them to theirselves (like a personal to-do list), or assign them to other Operators or Teams; those will be notified by email that a new Tasks was created for them.
If a Task is not completed before the given dead-line, it will cause the Ticket to appear as Out-of-SLA.

10.2 Creating New Tasks

To add a new Task to a ticket, please follow these steps:

1. Login as BizSuite Operator.
2. Locate the Support Ticket that you want to add a new Task to and click on its Edit icon.
3. On the bottom of the Ticket's details page, click on the "Tasks" tab. Click on the "Create New Task" button.

Please input the information as follow:

"<u>Task Description</u>": this is the description of the action that needs to be done.

"<u>Assigned To</u>": use this control to assign the new Task either to an Operator or a Team. Tasks that are assigned to a Team can be completed by any member of that Team.

"<u>Task Due before</u>": insert the date that this Task must be completed before.

"<u>Task Priority</u>": you can indicate the level of priority for this Task.

Click on the "Update" button to create the new Task. A new item will appear in the Tasks area and a progress bar will run, with the time, from the creation date to the expiration date, until the Task goes Out-of-SLA. If the Notifications are enable, BizSuite will automatically email the Operator(s) that the Task is assigned to to inform that a new Task is waiting to be completed.

10.3 Managing existing Tasks

Operators can access their pending Tasks by navigating to their Tickets or by clicking on the "My Tasks" buttons in BizSuite: the page is showing a list of the non-completed Tasks and allow Operators to complete them without navigating away from this page:

<u>Ticket</u>: click on this button to navigate to the Ticket details.

<u>Delete</u>: click on this button to delete the Task.

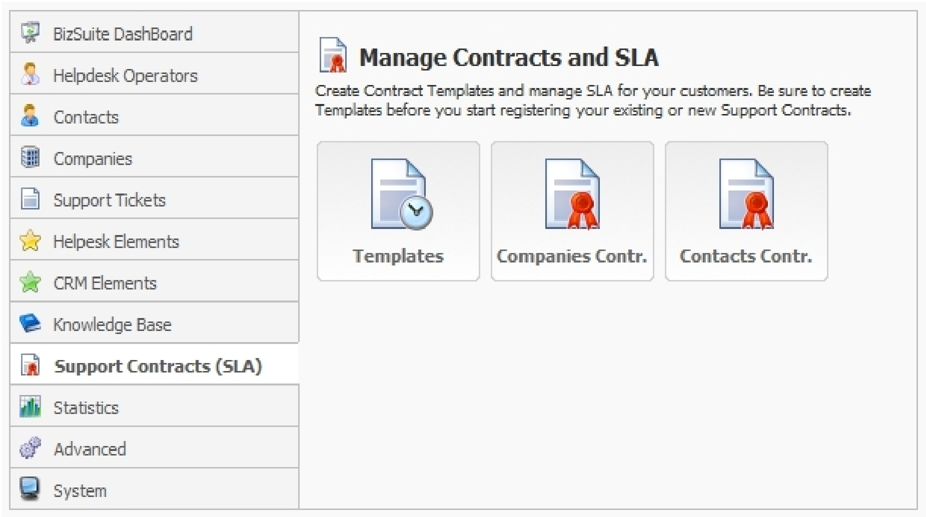
<u>Edit</u>: click on this button to access the Edit panel for the Task

<u>Complete</u>: click on this button to set this Task as finished. You will be able to optionally insert the taken hours and minutes, and these will raise the total of the time spent on the Ticket (this value is visible in the right pane of the Ticket's details page.

11 Contracts and SLA

11.1 What are Support Contracts?

BizSuite allow you to record the Contracts for each of your Companies or Contacts. By using Contracts, you can limit the number of Tickets that a Company or Contact can open before a new Contract has to be signed. Also, you can specify the SLA for each Contract, that is the quality of the Support given; normally, the high level support Contracts offer the fastest response and solution to Tickets. Before you register Contracts signed by your customers, you need to create Contact Templates.



11.2 Creating Contracts Templates

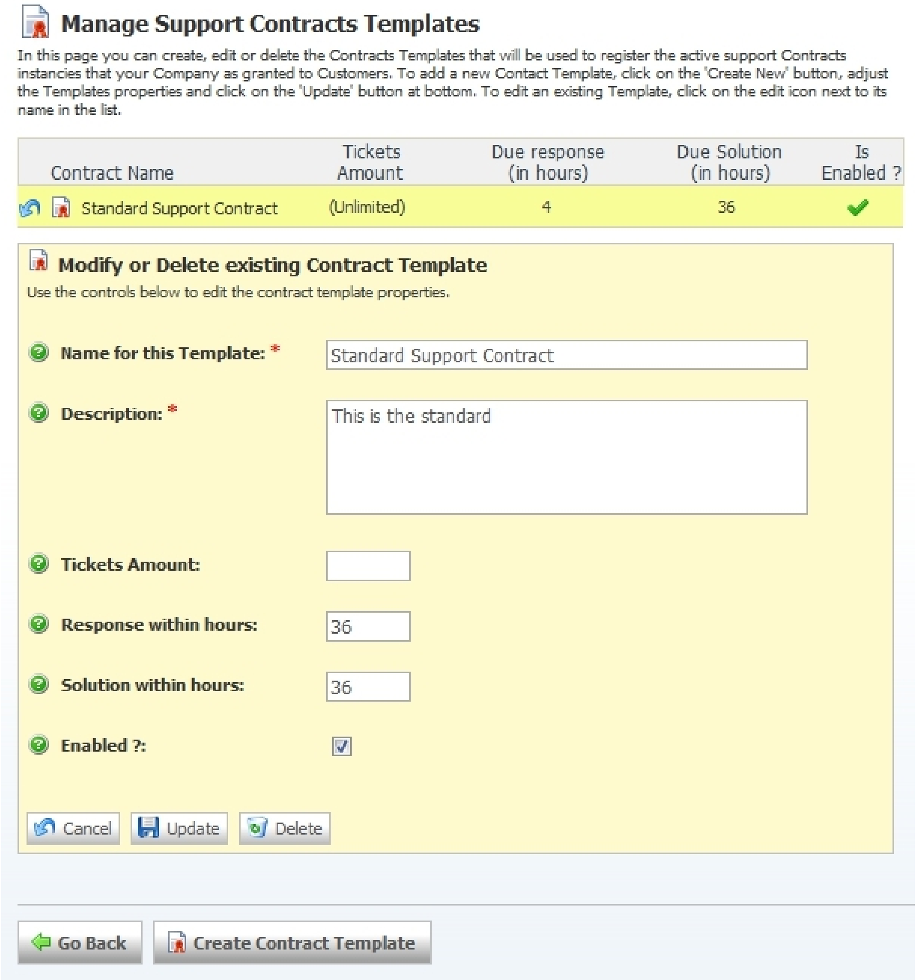
A Contract Template represents one of the Support Contracts type that your Company is offering. See the list below as a typical example:

- Gold Support: unlimited Tickets, response within 2 hours, solution within 4 hours.
- Silver Support: 100 Tickets, response within 6 hours, solution within 48 hours.
- Bronze Support: 40 Tickets, no date for response, no date for solution.

You can create as many Templates as your business requires. To create or edit a Contract Template:

1 Login as Bizsuite Administrator and navigate to BizSuite Dashboard.
2 Click on the "Support Contracts (SLA)" button in the vertical menu.
3 Click on the "Templates" button.

In this page you will see the list of existing Contracts Templates (if any). To create a new Contract Template click on the "Create new" button. To edit an existing template, click on the edit icon next to the template name. In the yellow edit pane, set the name and the description of this Template. Set the number of Tickets that a Company can open with this Contract (also known as "Carnets") or leave the text box blank if you do not want to set a limit. Set the hours for Response (which is the date when the Ticket is first handled by Operators) and for Solution (which is the date the Ticket is marked as Closed), or leave the text boxes blank if you do not want to set a deadline for SLA. When you have finished, click the "Update" button. Repeat these steps for all the Contract Templates that you need to create.



11.3 Creating Contracts Instances

Now it's time to register Contracts (instances) for your Companies or Contacts:

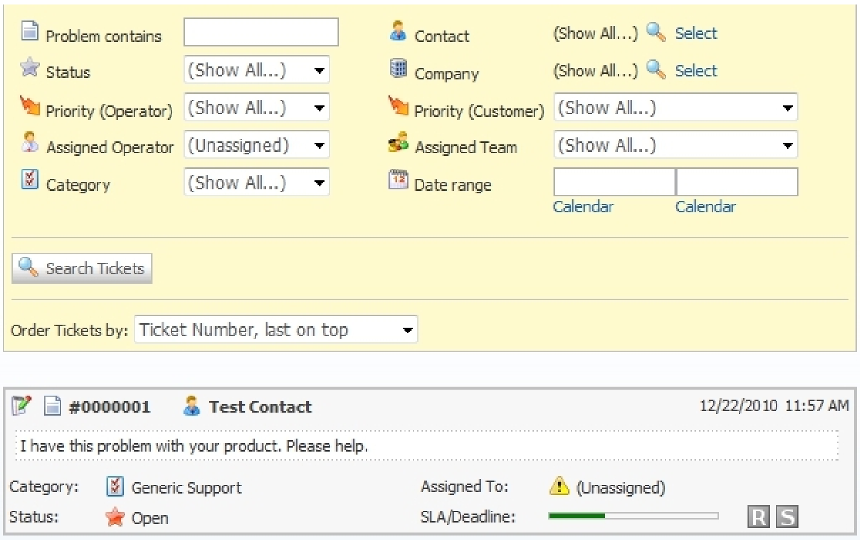
1 Login as Bizsuite Administrator and navigate to BizSuite Dashboard.
2 Click on the "Support Contracts (SLA)" button in the vertical menu.
3 Click on the "Companies Contr." or "Contacts Contr." button.
4 Click on the "Create New..." button.

In the "Create or Edit a Contract for a Company/Contact " page, select a Company or Contact, select a Contract Template and click "Update". A new tab at bottom of module will appear . Type a Contract Number that your company identifies this Contract with, set a Start and an End Date (this will tell if the contract is valid when a Contact will try to open a new Support Ticket). Click the "Update" button when you are done.

11.4 Checking Tickets SLA progress

When you set a Response and Solution limit (in hours), Helpdesk will help you to easily track the Tickets that are close to go Out of SLA. When logged as Operator, th dashboard will quickly inform if there are Tickets that are close (or gone) out of the SLA limits. Hover the mouse on the couloured flags for more informations.

In the Ticket search, the progress bar of the SLA will increment its value until the SLA limit is met. Also, the two "R" and "S" icons will tell information about the SLA expiration for the Ticket.



12 Email Notifications

12.1 What are Email Notifications?

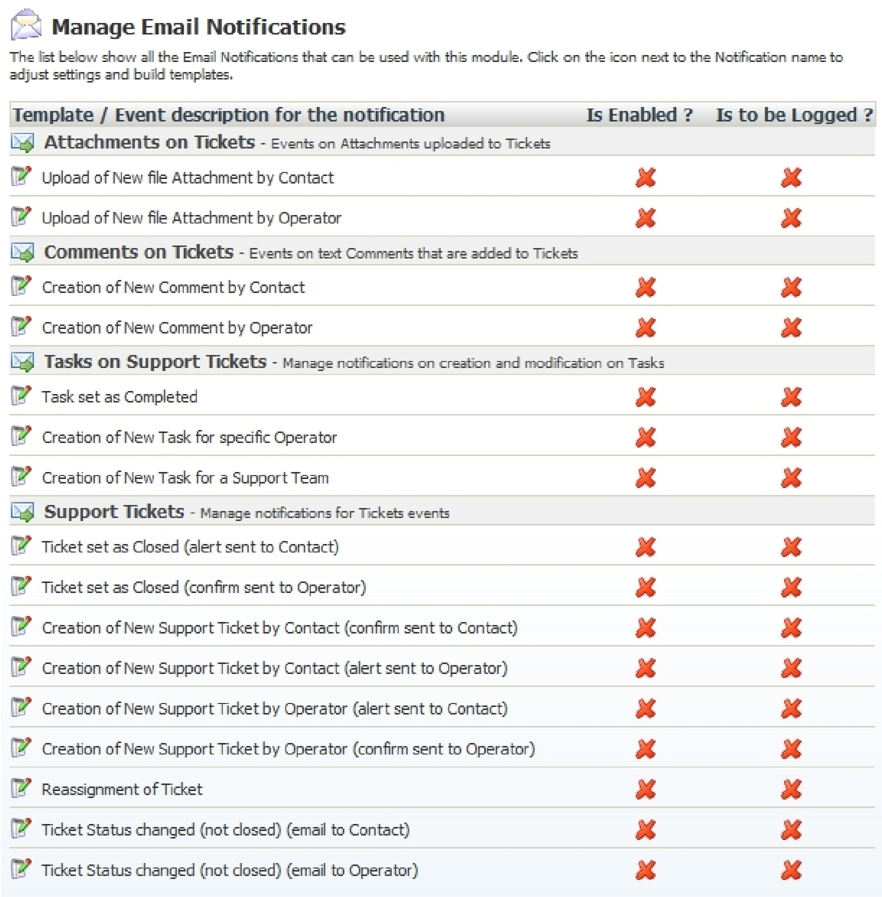
Notifications are basically alerts and confirmations there are sent via email from BizSuite module, to inform an entity about a specific event. You can use Notifications tool to establish an automatic communication between BizSuite module and Operators and Customers.

12.2 Managing Nofifications

To manage email Notifications:

1 Login as BizSuite Administrators and navigate to the BizSuite dashboard.
2 Click on "Advanced" in the vertical menu, then click on the "Notifications" button.

In the notifications list, click on the edit icon to navigate to the Notification details of the Notification you want to manage.



Manage Email Notifications

The list below show all the Email Notifications that can be used with this module. Click on the icon next to the Notification name to adjust settings and build templates.

Template / Event description for the notification	Is Enabled ?	Is to be Logged ?
Attachments on Tickets - Events on Attachments uploaded to Tickets		
Upload of New file Attachment by Contact	✗	✗
Upload of New file Attachment by Operator	✗	✗
Comments on Tickets - Events on text Comments that are added to Tickets		
Creation of New Comment by Contact	✗	✗
Creation of New Comment by Operator	✗	✗
Tasks on Support Tickets - Manage notifications on creation and modification on Tasks		
Task set as Completed	✗	✗
Creation of New Task for specific Operator	✗	✗
Creation of New Task for a Support Team	✗	✗
Support Tickets - Manage notifications for Tickets events		
Ticket set as Closed (alert sent to Contact)	✗	✗
Ticket set as Closed (confirm sent to Operator)	✗	✗
Creation of New Support Ticket by Contact (confirm sent to Contact)	✗	✗
Creation of New Support Ticket by Contact (alert sent to Operator)	✗	✗
Creation of New Support Ticket by Operator (alert sent to Contact)	✗	✗
Creation of New Support Ticket by Operator (confirm sent to Operator)	✗	✗
Reassignment of Ticket	✗	✗
Ticket Status changed (not closed) (email to Contact)	✗	✗
Ticket Status changed (not closed) (email to Operator)	✗	✗

In the Notification details page, you will see 6 different tabs:

<u>Template</u>: In this page you can define the layout and the information that will compose the Subject and Body of the email. You can use the placeholders from the "Tokens" tab to include data of the Ticket.

<u>Tokens</u>: In this tab you will see the available tokens for this Notification. A token, is a placeholder that will be replaced with the actual value when the Notification will be sent. You can use a copy/paste method, and

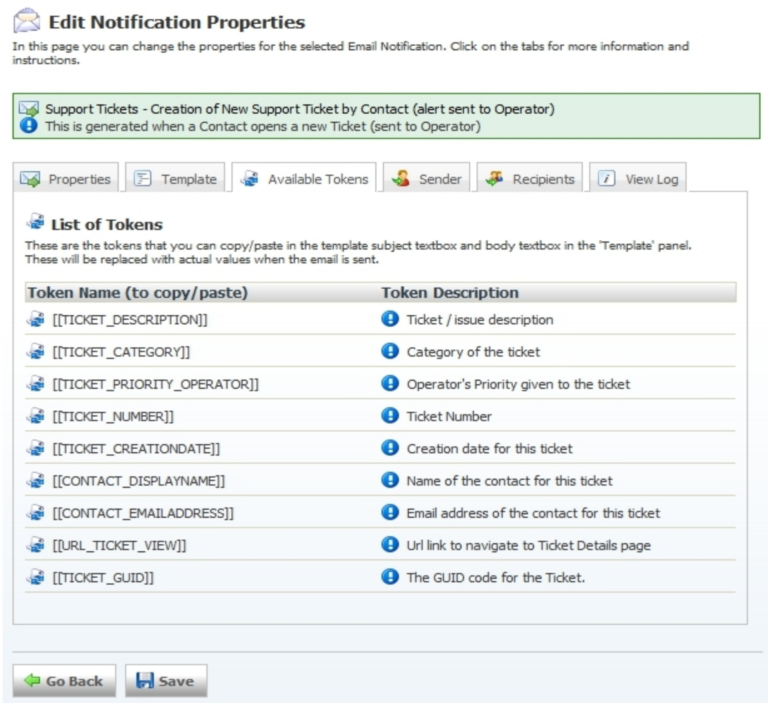
include the Tokens you need in the "Template" tab controls.

Properties: In this tab you can enable or disable the Notification and to set the logging process for it. If a Notification is logged, a new item will be added in the "Log" tab. You can use this method to debug Notifications or to keep an history of the Notifications sent.

Sender: Indicate the email address that will be used to send the Notification. Note that the "System email address" is the address that is set up in the "Preferences" of BizSuite.

Recipients: Here you can specify one or more Recipients for this Notification.

Log: If the logging for this Notification is enabled, you will see the history of the sent Notifications in this tab.



12.3 About Dotnetnuke Scheduler

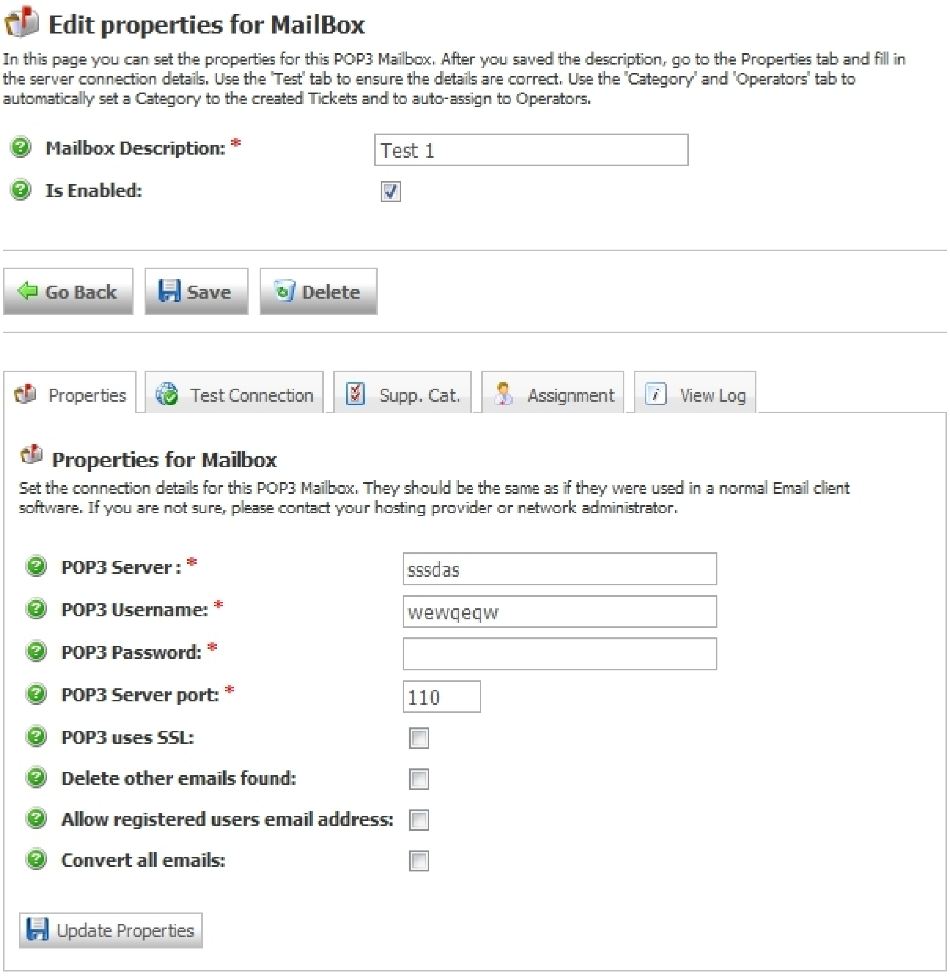
Both Notifications and POP3 Collector, use the Dotnetnuke Scheduler tool to start their jobs. Many of our customers reported that problem (non activity) occurs when the Scheduler is used in its default mode ("By Request"). To solve this problem, simply turn the Scheduler into "Timer" mode:

1 Login as SuperUser (Host) account.
2 Navigate into SuperUser -> Site Settings DNN menu.
3 Scroll down to the "Other Settings" section and find "Scheduler Method:" entry.
4 Set this option to "Timer Method", and click the "Update" button.

13 POP3 Email Collector

13.1 What is POP3 Collector?

Pop3 mailbox polling is used to retrieve support request emails that your company receives and transform them automatically into BizSuite Support Tickets. If properly configured, this feature will save much time to your Operators, as they will not need to manually enter Support Requests Details in Helpdesk, from the received emails. You will only need a normal email box and data to access it (the same data that you would use to configure your email client software such as Microsoft Outlook).



13.2 Adding POP3 Collector Jobs

You can create one or more jobs in the POP3 collector to check one or more mailboxes. To create a new job:

1 Login as BizSuite Administrator and navigate to the Adminsitrator Dashboard.
2 In the vertical menu, click on "Advanced". Click on "Email Collector" button.
3 In the "Manage POP3 Email Polling" click on the "Create POP3 Polling" button.

Type a description for this job and check the "Is Enabled ?" box. Click on "Save" and new tabs will appear on the bottom:

Properties: Type the access data for this POP3 email box. Please contact your hosting provider or system administrator if you are not sure about the details. These data are the same you would use to configure you email client software like Microsoft Outlook. By default, the collector job will tranform into Tickets only the emails sent by your Contacts. Check the "Delete other emails found", to instruct the job to delete emails that have not been sent by your Contacts. Check the "Allow registered users email address", to enable the transformation also of emails sent by your portal users (and not only from your Contacts). Finally, you can check the "Convert everything" to transform every email received: note that you should enable this option only if you are sure that no spam email is received in that email box.

Test Connection: Here you can run a network test to see if the details and credentials are correct. Be sure to save the data in the "Properties" tab first.

Supp. Cat.: In this tab, you can automatically assign a Category to the transformed emails.

Assignment: In this tab, you can automatically assign (and alert) Operators or Teams about a new transformed Ticket.

View Log: This panel lists all the events for the transformed tickets, for history and debug purpouses.

13.3 About Dotnetnuke Scheduler

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1. Login as SuperUser (Host) account.
2. Navigate into SuperUser -> Site Settings DNN menu.
3. Scroll down to the "Other Settings" section and find "Scheduler Method:" entry.
4. Set this option to "Timer Method", and click the "Update" button.

14 Knowledge Base

14.1 What is Knowledge Base

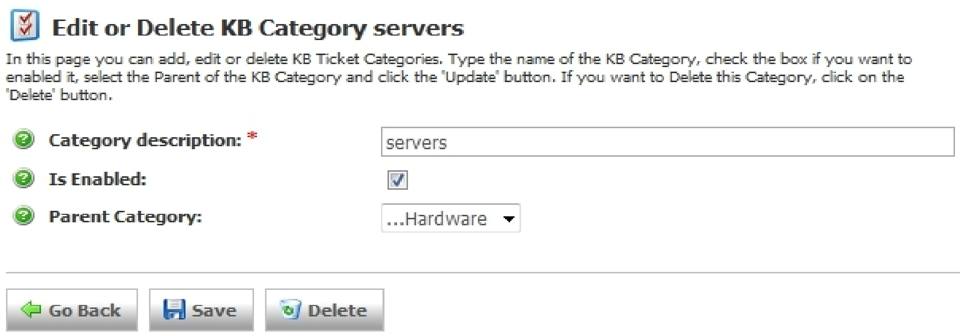
In version 01.00.20 we added a Knowledge Base component to our Helpdesk module. This component is available in Standard and Ultimate version only.
Knowledge Base (KB) supplis your customer with a library of articles with solutions to common problems. Often, this module can be used as a Frequently Asked Questions repository. Administrators can add edit or delete categories for the KB and also promote Operators to be able to publish KB articles. A search utility and a tree view with categories will help your visitor to quickly find a solution without the need of opening new Support Tickets.

14.2 Configuring Categories

To create and manage KB categories, please follow these steps:

1 Login as BizSuite Administrator and navigate to BizSuite Dashboard.
2 In the vertical menu, click on "Knowledge Base" and click on the "KB Categories" button.
3 In the Categories list page, click on "Create New Category".

In the Category Details page, type a name and enable this Category. Use the "Parent Category" control to build a Category tree (3 level of depth allowed), like you did with Support Categories.



14.3 Articles & Authors

KB Articles are created by your Helpdesk Operators. You first need to enable one, some or all of your Operators to be able to add and edit KB content:

1 Login as BizSuite Administrator and navigate to BizSuite Dashboard.
2 In the vertical menu, click on "Knowledge Base" and click on the "KB Publisher" button.

In the "Manage KB Articles Editor", click on the "X" and "V" icons to enable or to disable the ability for each Operator to create new Articles or to edit other Operators Articles of the KB.

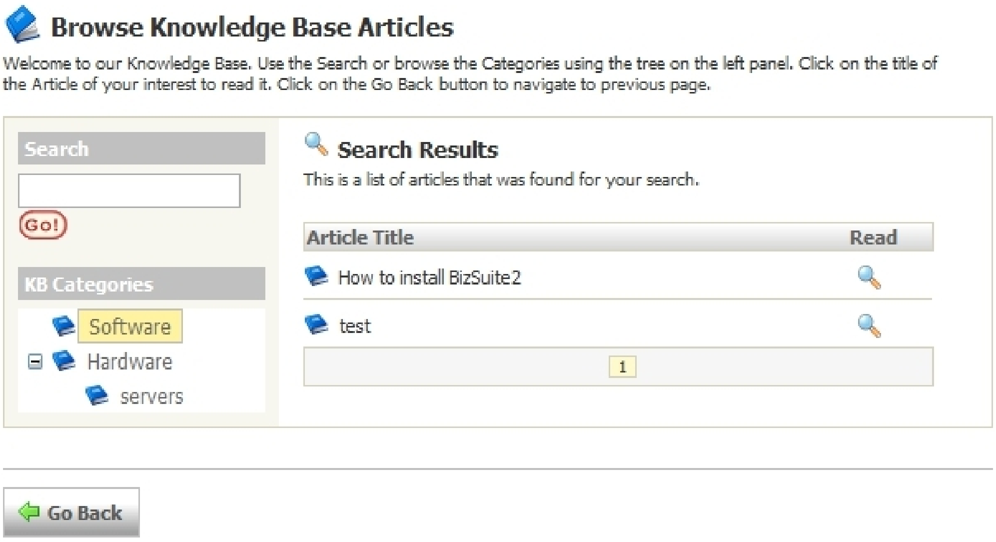
14.4 Creating New Articles

Now that you have enabled Operators to create new KB contents, follow these steps to add Articles to your Knoledge Base:

1 Login as one of the Operator with the permission to create Articles.
2 In the BizSuite Dashboard, click on the "Knowledge Base" vertical menu.

3 Click on the "New Article" button to navigate to the "Write new KB Article" page.

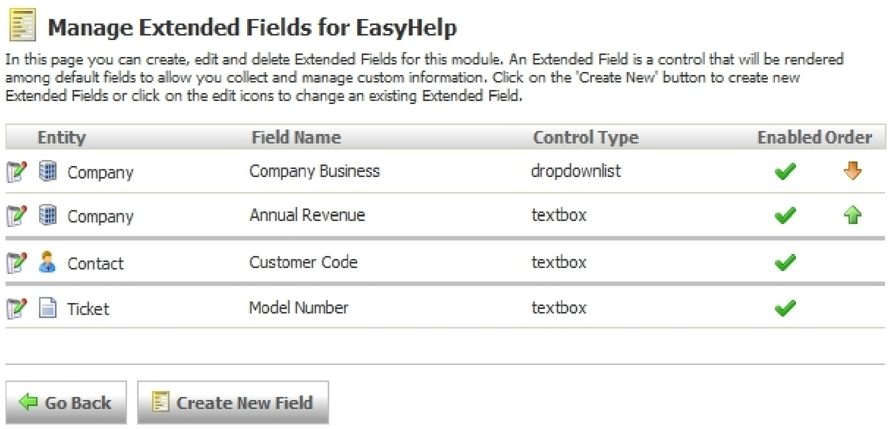
Complete the required fields to build the KB article. After the click on the "Save" button, the article will be created and you will be able to add, in case, attachments to it.



15 Extended Fields

15.1 What are Extended Fields?

If you need custom information to be stored together with your Tickets, or need more details about Companies, you can use Bizsuite's Extended Fields. With this tool, you can have additional fields just below the default fields of the module. You can add as many fields you would like, there are no limits in Extended Fields quantity.



15.2 Creating new Extended Fields

To add your custom fields, please follow these steps:

1 Login as BizSuite Administrator and navigate to the Administrator's Dashboard.
2 Click on the "Advanced" vertical menu button.
3 Click on the "Extended Fields" button.
4 In the "Manage Extended Fields", click on the "Create New Field" button.
5 In the "Edit or Create Extended Field", type a key name and check the box to enable this field.
6 Click on the "Save" button to create the new Extended Field.

In the "Properties" tab that appears below, please input:

Entity Type: Select the type of object that you would like to add this field to.

Field Label: Type the label that will be at the left of the field, like "Model Number".

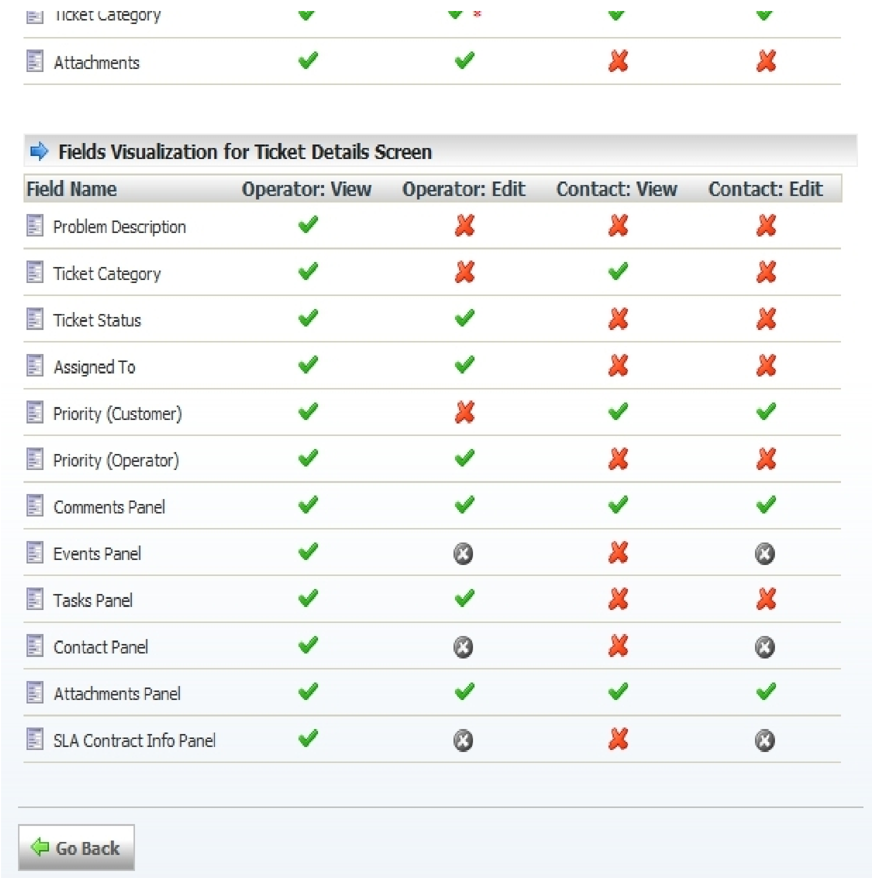
Help Text: Type the text that will be shown when the mouse will hover on the help icon of the field.

Type of Input Control: Select the type of control: it can be a normal "text box" or a "drop down list". If you choose "drop down list" type, a new tab will appear when you click on the "Update Properties" button. In this tab you will be able to build the list of selectable items for the drop down.

Is mandatory: Indicates if the information is mandatory. Note: for Tickets Extended Fields, this control is made in the "Fields Visualization" page, together with the other Tickets fields settings.

15.3 Showing the fields

Extended fields are shown by default in the details page(s) of the entities they have been bound to. In the case of Tickets, the display and behaviour of the new fields is controlled in the "Fields Visualization" page. To more information about this page, check the "Fields Visualization" section.
Just like every other field for Tickets creation and edit page, you can display or hide the Extended Field and set that as mandatory (for Contact, for Operators, or for both).



16 Fields Visualization (Tickets)

16.1 How to hide/display Fields

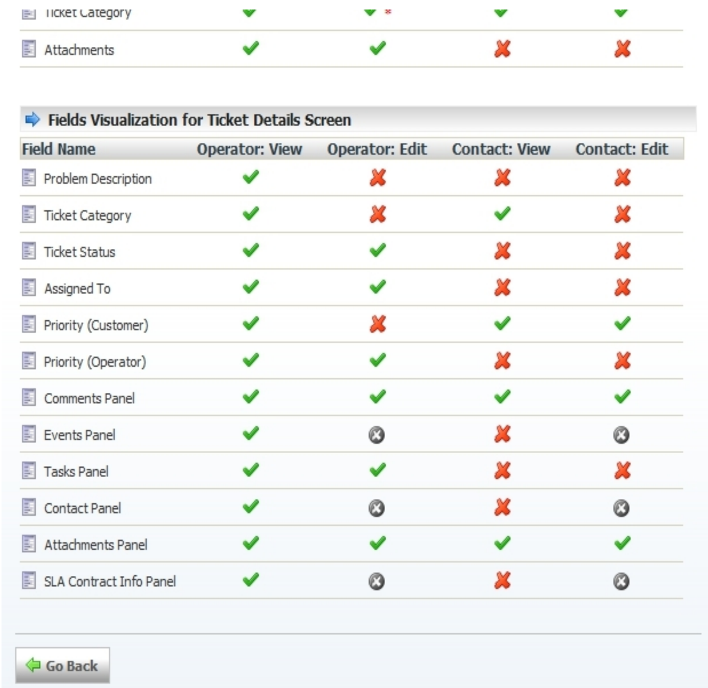
In both Ticket creation page and Ticket Details page, you can control each of the fields (and tabs), and hide them optionally to Contact, Operator or both. To manage these fields, follow these steps:

1 Login as BizSuite Administrator and navigate to BizSuite Administrators Dashboard.
2 In the vertical menu, click on "Advanced", then click on the "Fields Visualization" button.
3 You will see two lists of files: the first list is considered for the Ticket creation page, and the second list is considered for the Ticket details page.
4 Adjust the "V" and "X" icons by directly clicking on them. For each field, you can set the visibility permission and set if the field can be edited; you can have specific settings for Customer and Operators. For example, the "Operator Priority" is normally hidden to Customers and shown to Operators.
5 Note that you can set these permissions also to the Extended Fields that you have added to the "Tickets" entity type.

16.2 Mandatory Fields

In the same page, you can set the visible fields as mandatory, to force the input of the user. By clicking on the "V" and "X" icons, you will see the "V*" options, which means, that the field will be visible and mandatory. A normal "V" means that the field is shown, but not mandatory. Note that not all the fields can be set as mandatory.

The same process applies to the Extended Fields that you have added to the "Tickets" entity type.



Ticket Category	✔	✔*	✔	✔
Attachments	✔	✔	✘	✘

Fields Visualization for Ticket Details Screen

Field Name	Operator: View	Operator: Edit	Contact: View	Contact: Edit
Problem Description	✔	✘	✘	✘
Ticket Category	✔	✘	✔	✘
Ticket Status	✔	✔	✘	✘
Assigned To	✔	✔	✘	✘
Priority (Customer)	✔	✘	✔	✔
Priority (Operator)	✔	✔	✘	✘
Comments Panel	✔	✔	✔	✔
Events Panel	✔	⊗	✘	⊗
Tasks Panel	✔	✔	✘	✘
Contact Panel	✔	⊗	✘	⊗
Attachments Panel	✔	✔	✔	✔
SLA Contract Info Panel	✔	⊗	✘	⊗

Go Back