Staff control panel user manual

Staff users typically use the staff control panel to handle the following primary tasks:

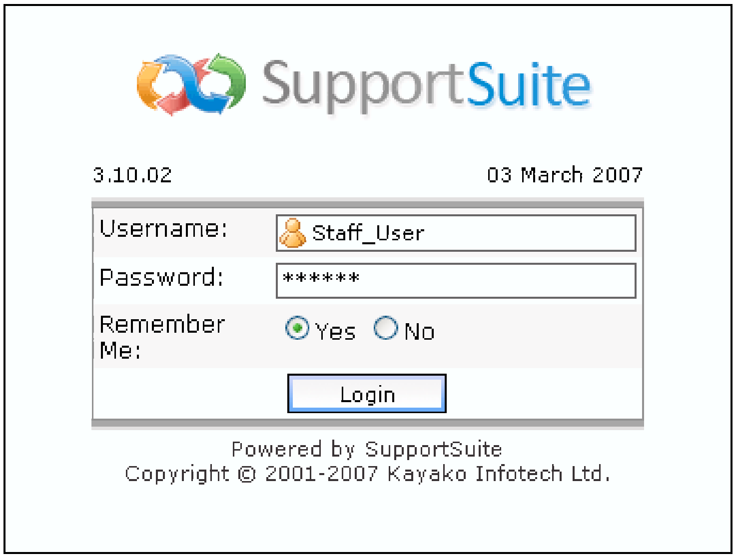
- Ticket management.
- User management.
- Downloads management.
- Knowledgebase management.
- Trouble-shooter management.
- News management.
- LiveResponse management.
- Send private messages to other staff.
- Teamwork management.
  - View calendars.
  - Manage contacts.
  - Manage events.
  - Manage tasks.

Much of the staff control panel is permission dependant. Permissions for **staff users** or **staff groups** are managed in the administrator control panel – *not* within the staff control panel.

Accessing the staff control panel

The staff control panel can be accessed at:
http://www.*yourdomainname*.com/*pathtosupportsuite*/staff

You will be presented with a login form similar to the one shown below.

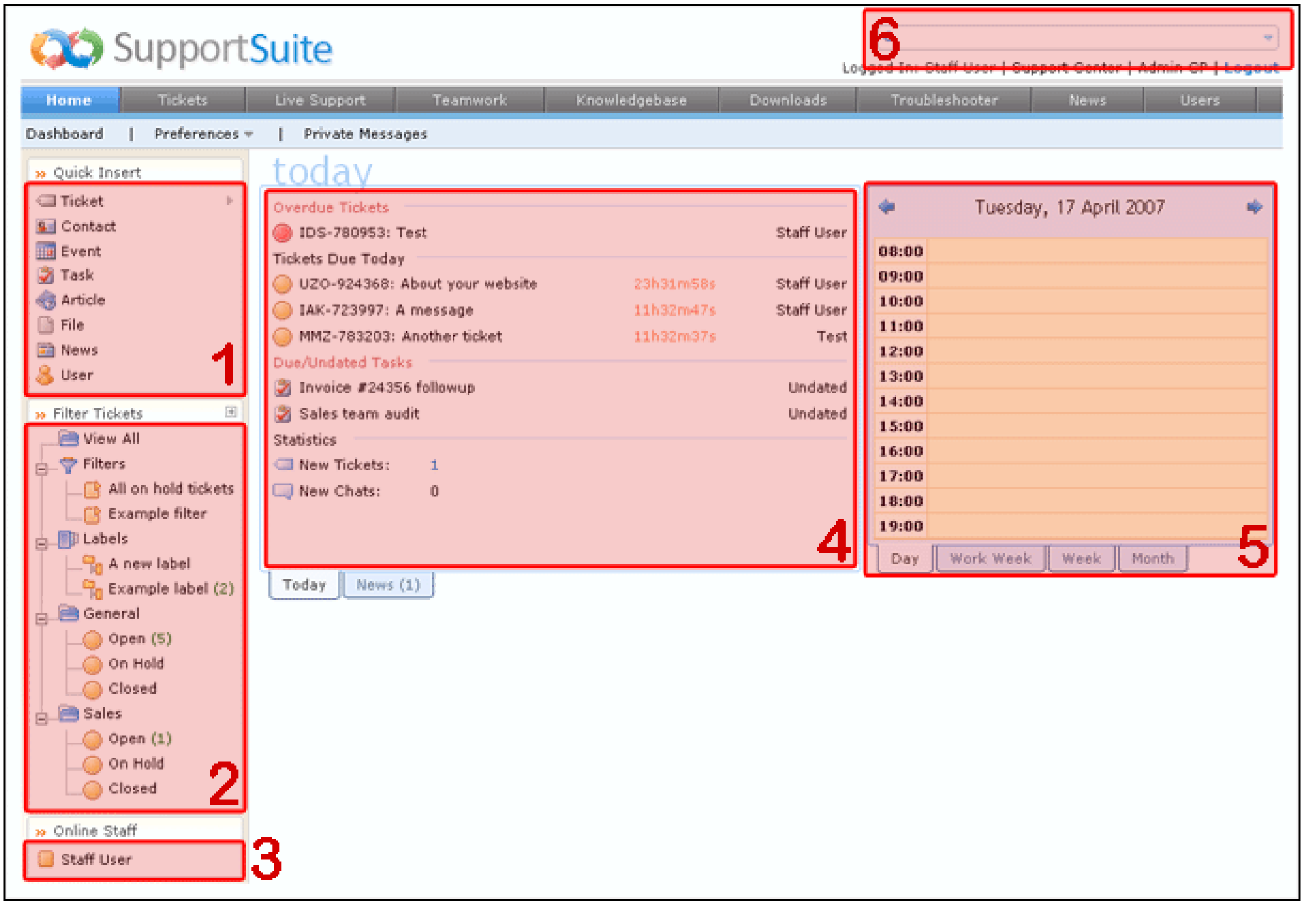


- **Username** – your staff/admin username.
- **Password** – your staff/admin password.
- **Remember Me** – if enabled, your login details will be 'remembered' using a browser-based cookie.

Interface quick reference

The interface quick-reference is a visual FAQ (frequently asked question) guide to the most common interfaces of the SupportSuite **staff control panel**.

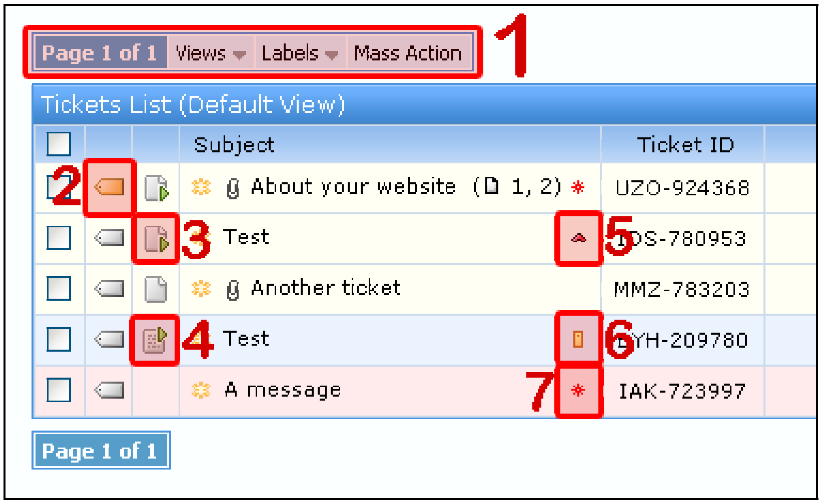
Dashboard



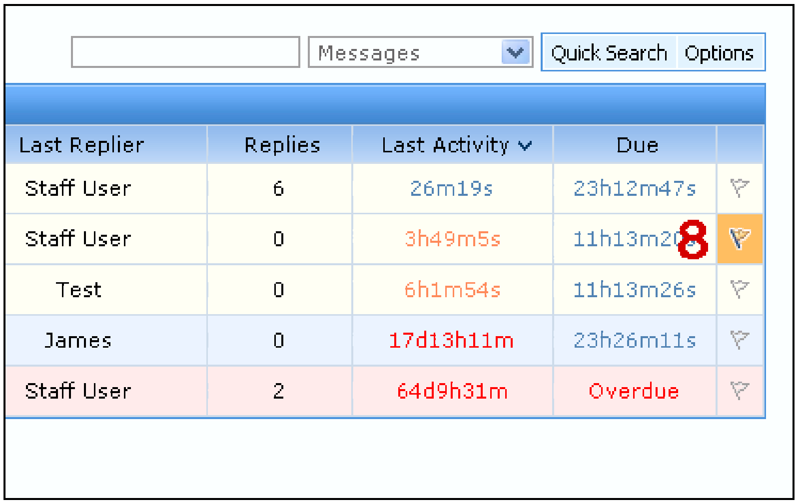
- **1** – the quick-insert menu. From this menu you can quickly insert/create new tickets, contacts, events, tasks, articles, files, news and user accounts.
- **2** – the department and ticket tree (see department and ticket tree). Lists departments, sub-statuses, filters and labels.
- **3** – staff status box. Displays the staff users who are logged into the staff control panel, administrator control panel or LiveResponse Client Application (see staff status).
- **4** – the today overview. Shows overdue tickets, overdue tasks (see tasks), tickets due today and overdue tickets, new tickets since your last visit and new chats.
- **5** – the calendar overview. Shows your current day's events and appointments (see events and appointments) according to your configured work schedule (see work schedule).
- **6 –** the article quick-search box. Type keywords into this box and "wait" – if any matching knowledgebase articles are found they will open up in a list.

Ticket listing

For clarification, the ticket listing shown below has been split vertically in two.

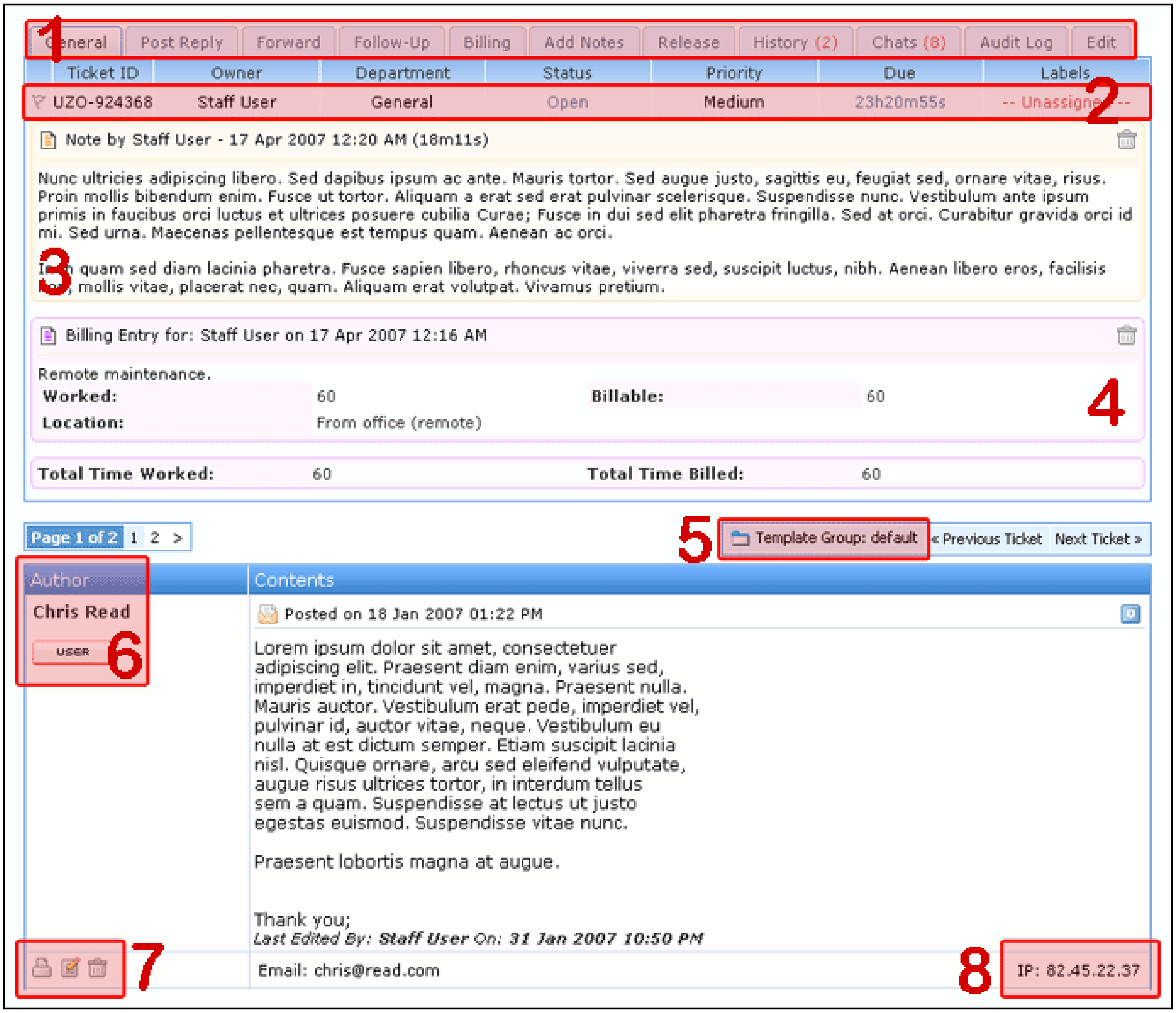


- **1 –** Change the ticket listing view (see customizing your ticket lists), create a new label (see ticket labels) and open the mass-action menu.
- **2 –** the yellow ticket icon indicates that the ticket has been updated since your last visit. A Gray ticket icon indicates no updates since your last visit.
- **3 –** the note and billing icon shows here if the corresponding ticket has had one or more ticket notes added to it (see ticket and user notes) and a billing entry (see billing information and time tracking) logged.
- **4 –** the billing icon shows here if the corresponding ticket has had a billing entry (see billing information and time tracking) logged.
- **5 –** the escalation icon shows here if the ticket has been escalated, affected by an escalation rule (see escalated tickets).
- **6** – the label icon shows here if the ticket has one or more labels attached to it (see ticket labels).
- **7 –** the assigned icon shows here if the ticket has been assigned to yourself.



- **8** – the ticket shown here has been flagged (see ticket flags).

Ticket view



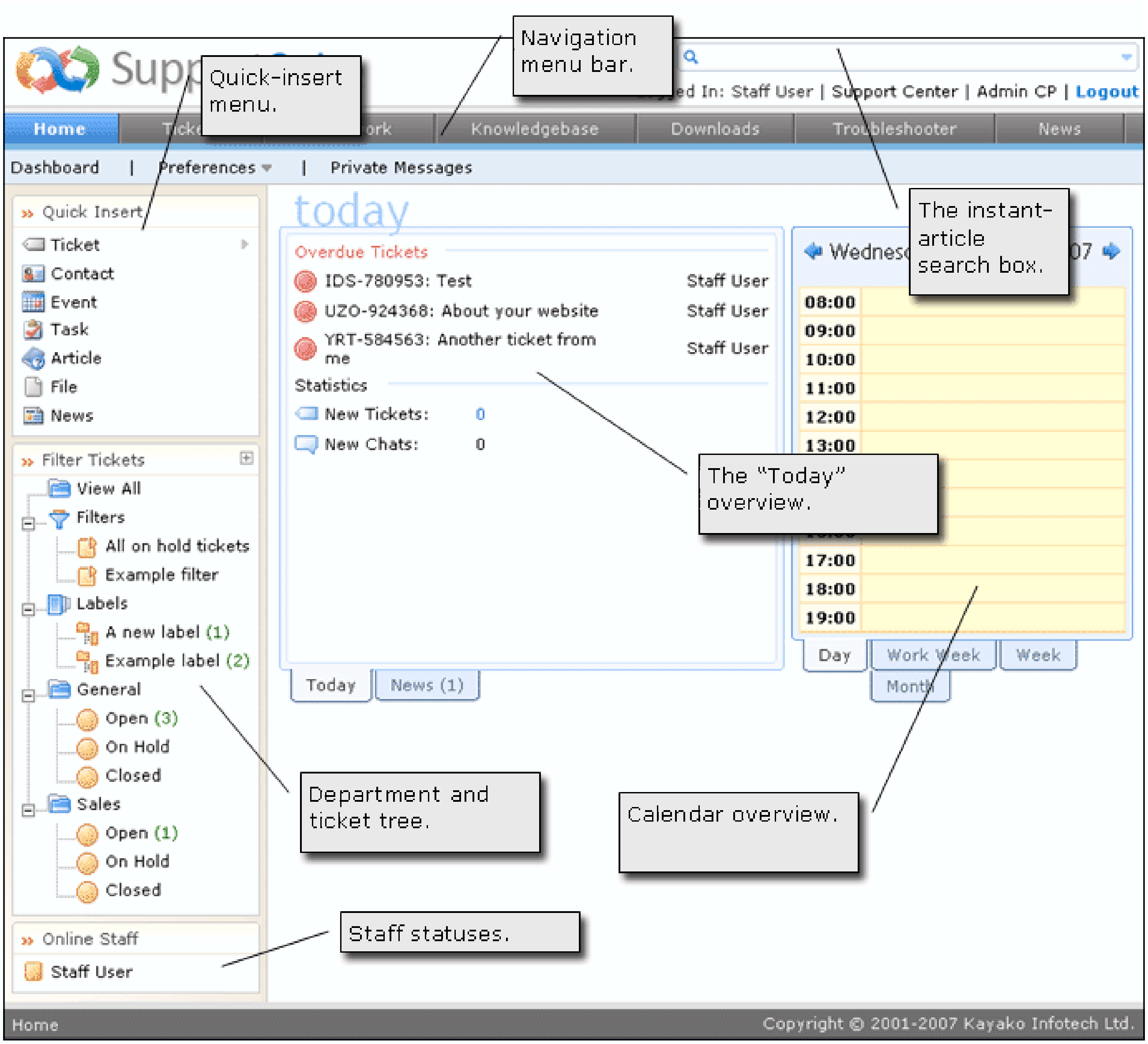
- **1 –** the ticket management menu (see ticket management menu).
- **2 –** the ticket information bar (see ticket information bar).
- **3 –** the contents of a ticket note that has been added to the ticket (see ticket and user notes).
- **4 –** the contents of a billing and time tracking entry that has been added to the ticket (see billing information and time tracking).
- **5 –** the template group through which the client user submitted this ticket (see template groups in the administrator control panel).
- **6 –** the ticket replier's name and recipient type (see CC, BCC and third party recipients

- **7 –** print , edit or delete the ticket reply. When the ticket reply is received by the mail parser, a e-mail headers icon will show. Clicking this will allow you to view the raw e-mail headers for this ticket reply.

- **8 –** the ticket replier’s IP address.

Dashboard

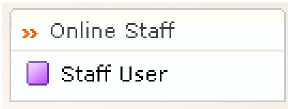
The **dashboard** is a system overview, presented to you when logged into the staff control panel, as shown below.



1. Staff status
2. Department and ticket tree
3. Quick-insert menu
4. Navigation menu
5. Calendar overview

6. Today overview
7. Instant-article search box

Staff status

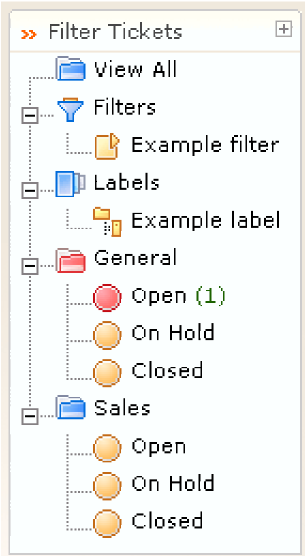


The **online staff** box lists all staff users who are currently logged into the staff or admin control panel.

- A **purple icon** denotes the staff user logged into LiveResponse Client Application.
- A **yellow icon** denotes the staff user logged into the staff control panel.
- A **pink icon** denotes the staff user is logged into the administrator control panel.
- A **PDA icon** denotes the staff user is logged into the staff control panel via the PDA interface.

Clicking a staff user's name from within this box will take you immediately to a new **private message** screen, allowing you to send a private message to that staff member.

Department and ticket tree



The department tree lists the following:

- A view all link.
  - Clicking on this will show all tickets whose status is **open**.

- A list of filters.
  - Clicking on a filter name will display all tickets matching the criteria of the filter. For more information, see ticket filters.

- A list of labels.
  - Clicking on the name of a label will display all tickets that have the corresponding label attached. For more information, see ticket labels.

- A list of all support departments you (as a staff user) have access to.
  - Clicking on the name of a department will display all tickets whose status is set to **open**.

- The ticket statuses within each department.
  - Clicking on the name of a status will display all tickets set to the corresponding status. For more information on statuses, see ticket status.

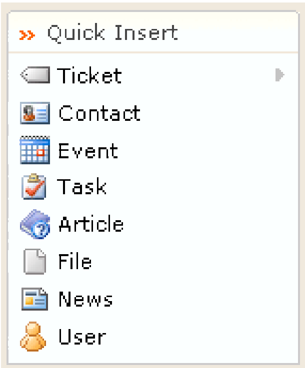
- The ticket count within each department.

- A red icon if there is a newly updated ticket within the department or a yellow icon if there are no newly updated tickets within the department.

- Each tree on this menu is expandable and retractable. This means that clicking on the " + " or " – " icon at the top of each tree will respectively expand or retract that menu.

- Likewise, clicking on the " + " icon at the top-right of the tree content box will expand/retract **all** menus respectively.

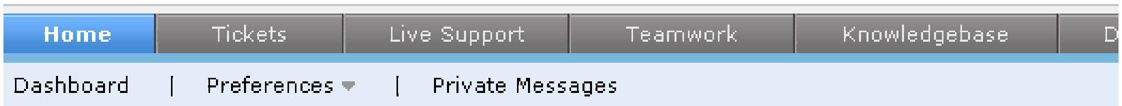
Quick-insert menu



The **quick-insert menu** provides one-click access to forms enabling you to insert or create new items within the system.

- **Ticket** – create a phone or an e-mail ticket (send an e-mail). For more information, see creating a ticket.
- **Contact** – create a new contact. For more information, see contacts.
- **Event** – insert a new event into the calendar. For more information, see teamwork.
- **Task** – create a new task. For more information, see teamwork.
- **Article** – create a new article and insert it into the knowledgebase. For more information, see knowledgebase.
- **File** – create a new file and insert it into the downloads database. For more information, see downloads.
- **News** – create a new news item. For more information, see news.
- **User** – create a new user (support desk users – not staff or administrator users). For more information, see creating a new user.

Navigation menu bar

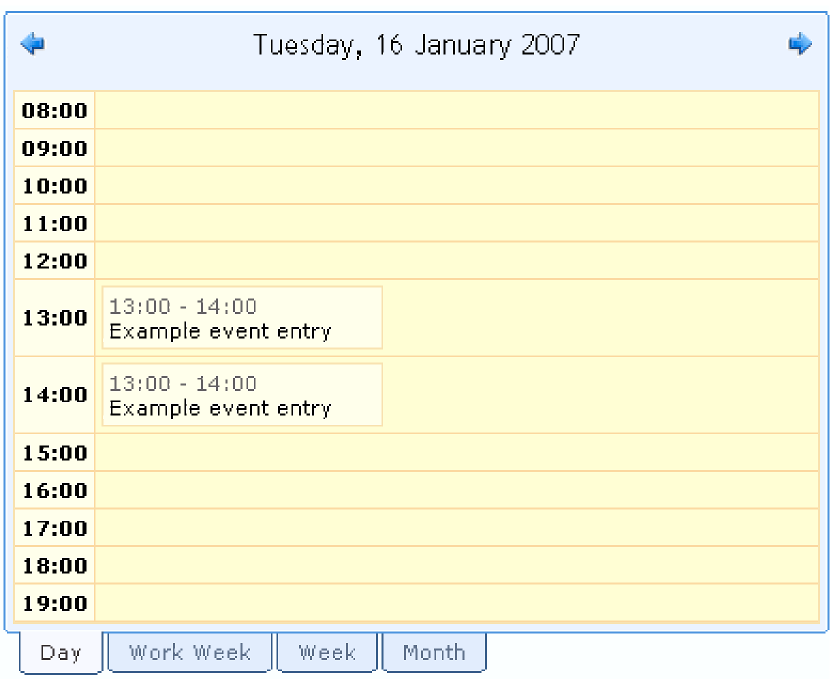


The **navigation menu** allows for navigation around all of the core sections of SupportSuite. Depending on your configuration in the administrator control panel (see general settings), opening a menu item will involve clicking or hovering over an item.

Calendar overview

The **calendar overview** shows today's public and private events for the **working hours** set in your staff user preferences (see the work schedule).

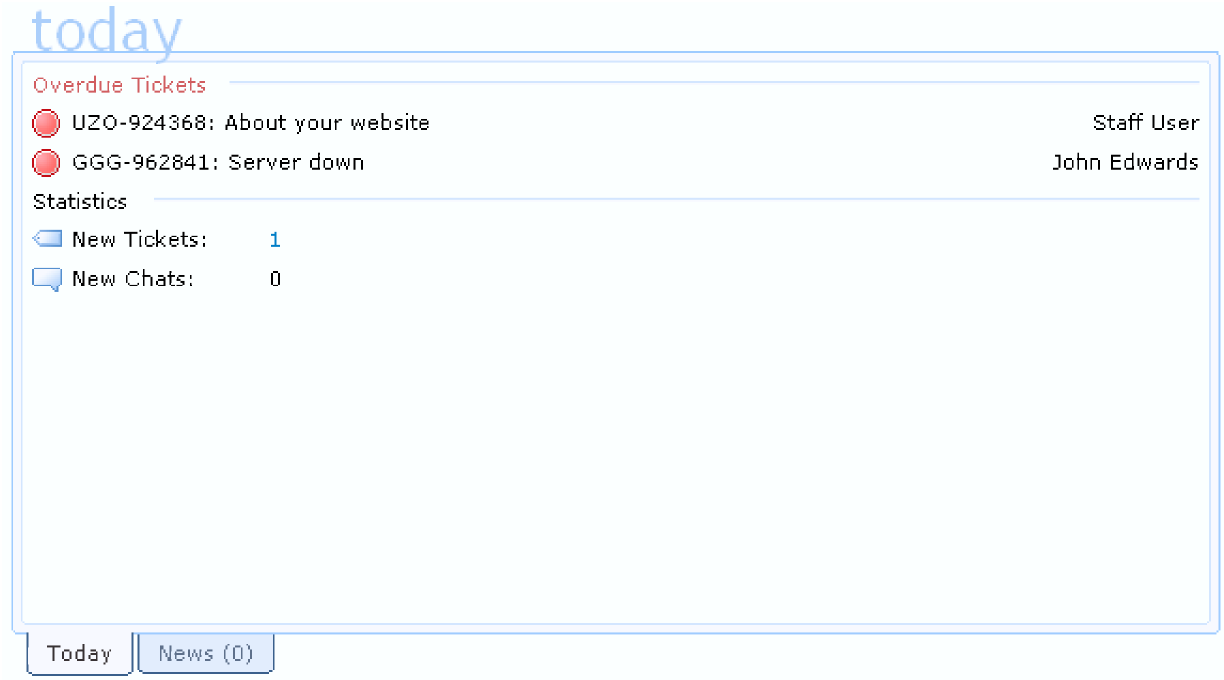
Clicking on an event will take you to more detailed information for that event entry, as shown below.



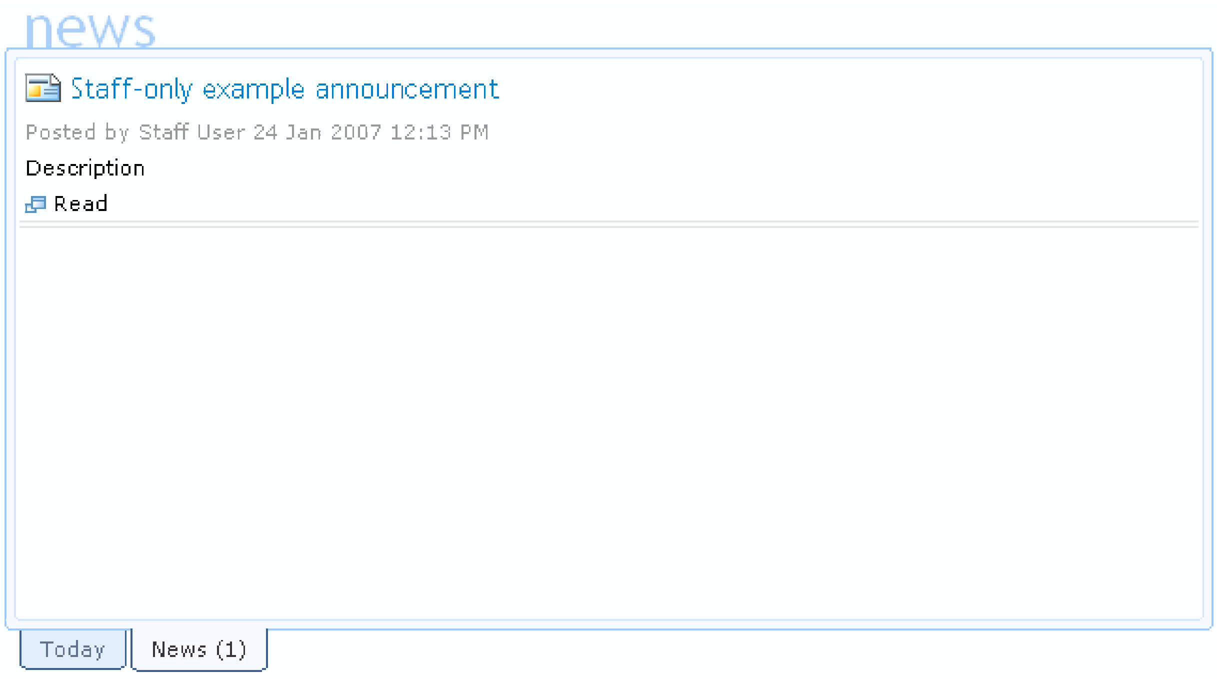
Today overview

The today overview gives a preview of the following information:

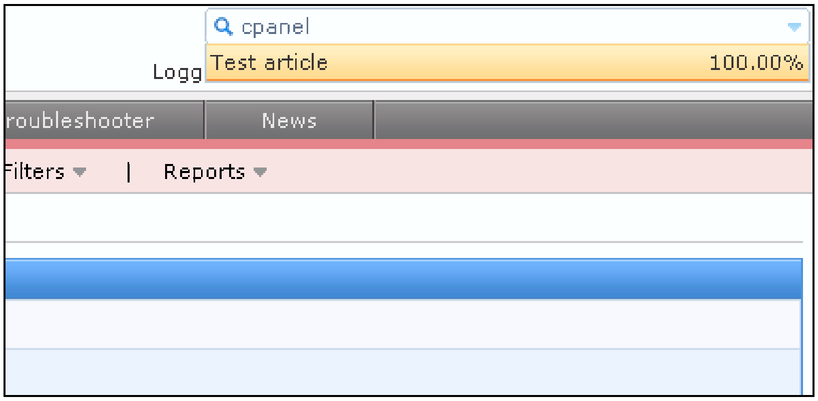
- Number of updated or new tickets ("new tickets") since your last visit.
- Number of new chats since your last visit.
- Number of tickets "due today".
- Number of tickets "overdue".



Clicking on the **News** tab will show news items that have been posted for staff user access only, as shown below. For information on managing and creating news items see news.

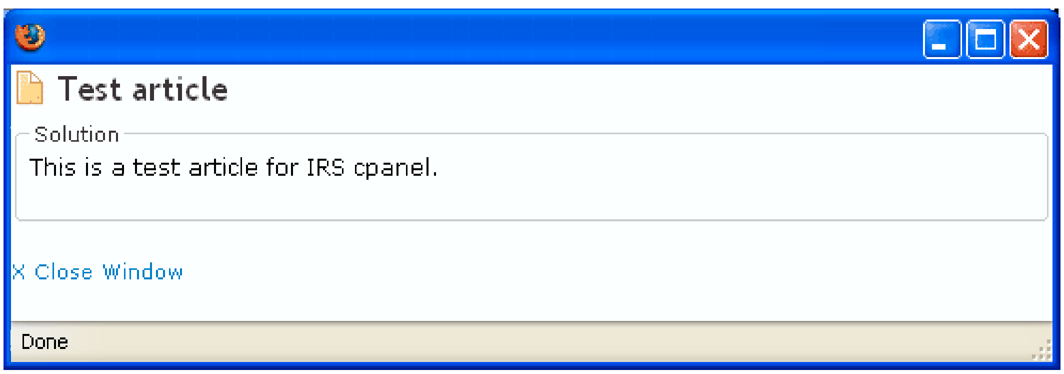

news
Staff-only example announcement
Posted by Staff User 24 Jan 2007 12:13 PM
Description
Read
Today
News (1)

Instant article search box



Typing a keyword (or a series of keywords) into the search box on the top right of the interface will search all **knowledgebase** articles for related articles.

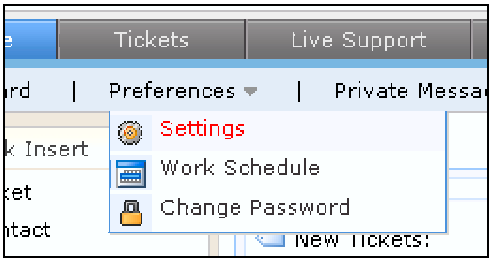
All the staff user has to do is type and wait for the search to be performed. Clicking on a search result will open the article contents as shown below.



Staff user preferences

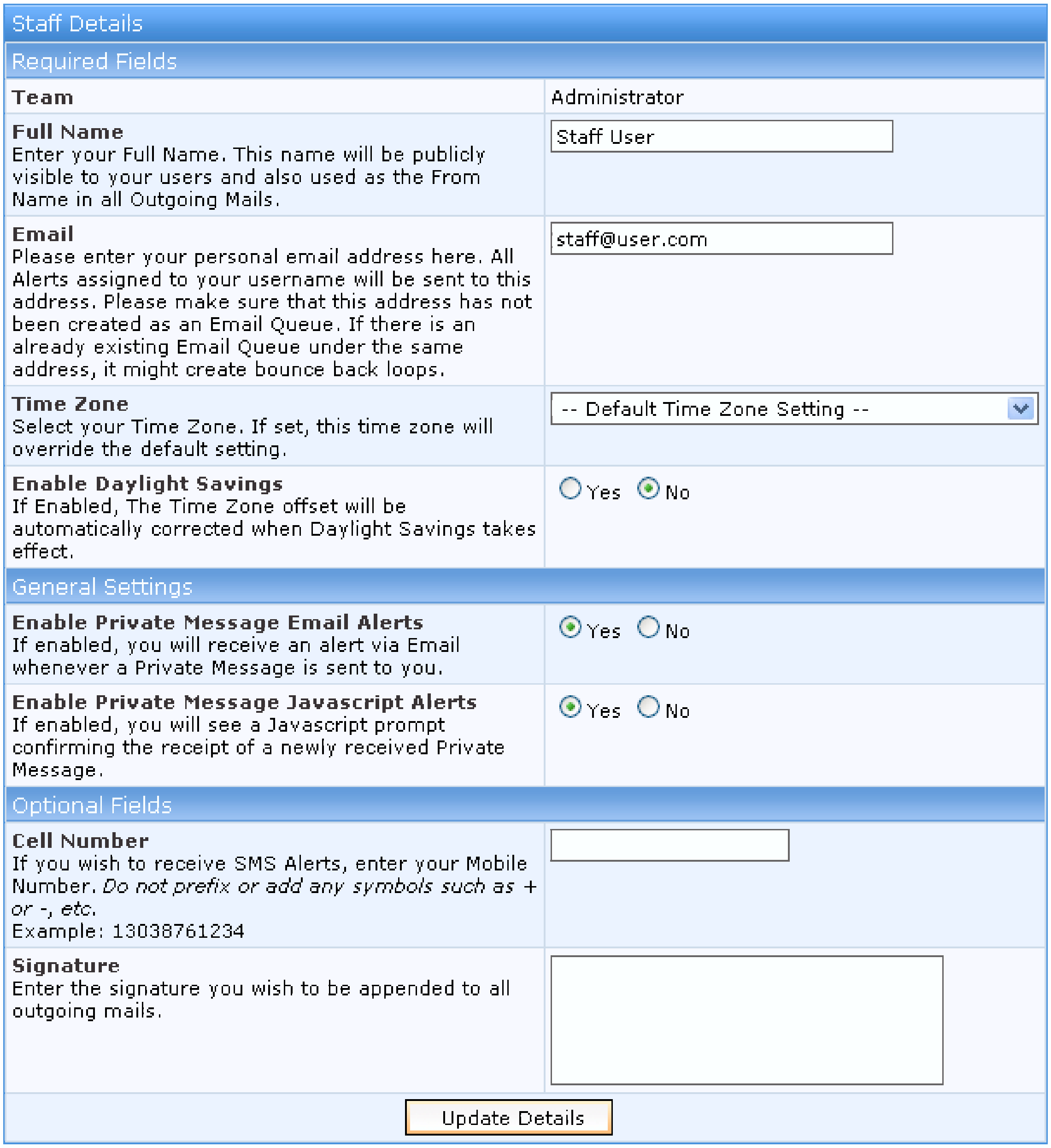
To access the preferences overview:

1. Open **Home** on the navigation menu bar, as shown below.



2. Open the **Preferences** sub-menu.

3. Click **Settings**.



Required Fields

- **Team** – if you have been added to a staff team (configurable using the administrator control panel), the team name will be displayed here.

- **Full Name** – your full name. This name will appear on your ticket replies, for example.

- **E-mail** – your personal e-mail address.

- **Timezone** – a configurable timezone offset.

- **Enable Daylight Savings** – enabling this option will cause SupportSuite to automatically correct its timezone offset when daylight savings time is applicable.

General Settings

- **Enable Private Message E-mail Alerts** – enabling this option will cause SupportSuite to send an e-mail to your personal e-mail address (configured above) upon receipt of a private message sent via the staff control panel.

- **Enable Private Message JavaScript Alerts** – enabling this option will cause a JavaScript popup window to appear whenever you receive a new private message, as shown below.

Optional Fields

- **Cell Number** – your cell phone (mobile phone) number. This is especially required if you plan to use the Kayako SMS Gateway (see Kayako SMS gateway).

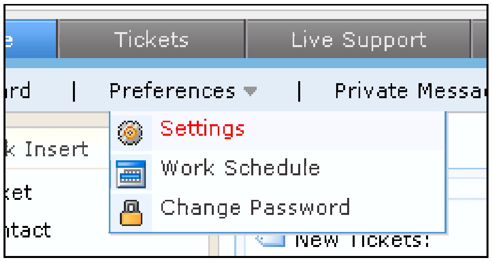
- **Signature** – this signature field can be appended to all of your ticket replies.

Click the **Update Details** button to confirm your preference changes.

Changing your password

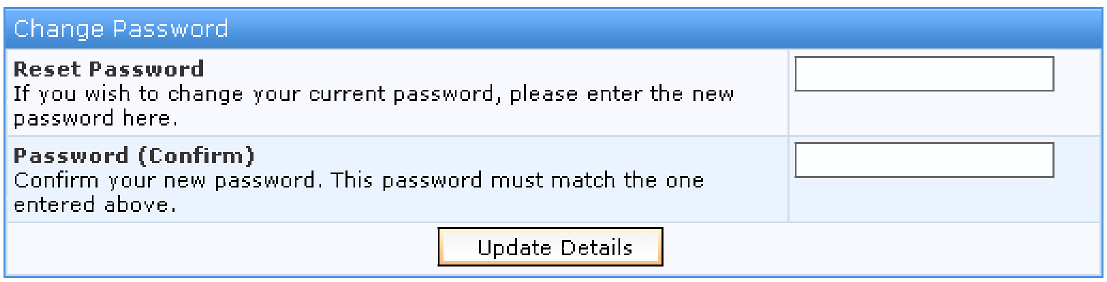
To change your password:

1. Open **Home** on the navigation menu bar, as shown below.



2. Open the **Preferences** sub-menu.

3. Click **Change Password**.



- **Reset Password** – enter your new password here.

- **Password (Confirm)** – renter your new password to confirm your typing.

Click the **Update Details** button to make the password change.

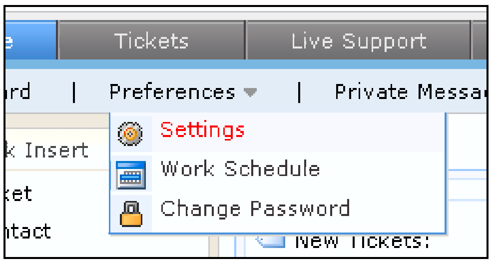
Your work schedule

The work schedule is configurable by yourself and can be found under the **Preferences** menu.

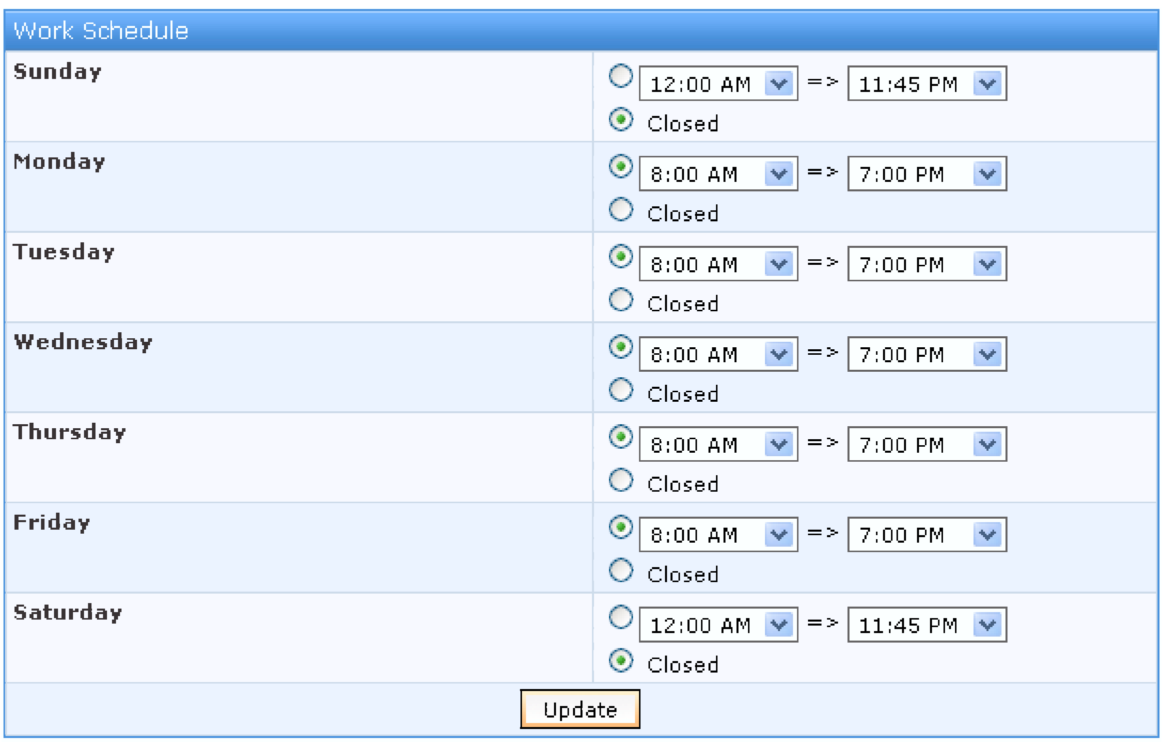
The work schedule entered here determines the **hours** that are displayed for your daily calendar overview on the dashboard, as shown in the dashboard section – where only your working hours set here are displayed.

To access the work schedule area:

1. Open **Home** on the navigation menu bar, as shown below.



2. Open the **Preferences** sub-menu.
3. Click **Work Schedule**.



Modify the hours for each day as appropriate, or select the **Closed** radio button if no hours are worked on this day.

Click the **Update** button to save your edited work schedule.

Tickets

The ticketing features of SupportSuite make up one of the major components of the system – ticketed help support.

The **client user** can submit a ticket via the **client support interface** (through form) or (if an e-mail pipe has been configured in the **administrator control panel**), the user can submit a ticket through e-mail.

When a new e-mail is sent with a new subject, a new ticket is created. All e-mail replies to this e-mail subject (which contains, by this time, a **ticket ID**) will be appended to the same ticket.

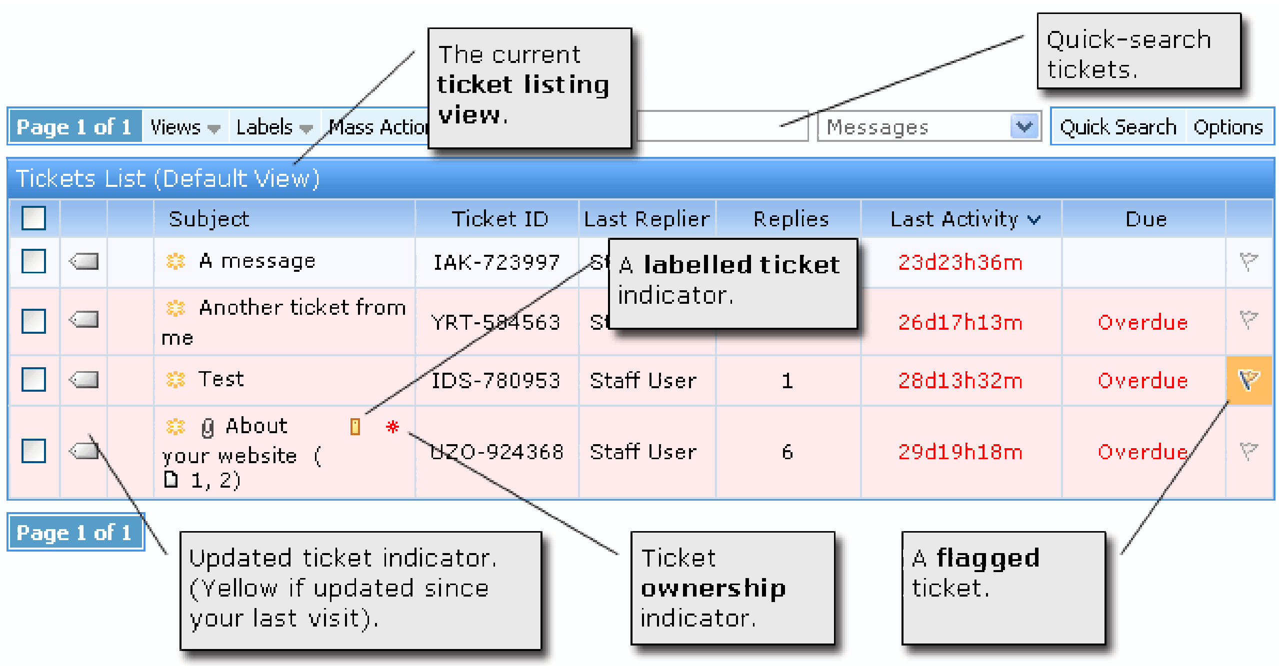
The client can log in to the **client support interface** and review all correspondence to and from their e-mail address, and staff users can log in to the **staff control panel** to review tickets (such as move their department, respond to tickets, change a ticket's status and much more).

A ticket comes with the following properties:

- A department – where the ticket is located. A typical set of departments would be "Sales", "Billing" and "Support".
- A status – open, closed and on-hold are the default statuses.
- A priority – low, medium, high, critical and emergency are the default priorities.
- A label – labels or "tags" can be attached to tickets (staff use only).
- A flag – a colored flag used to flag tickets (staff use only).
- Notes – notes for view only by other staff users.
- Billing information – staff users can keep track of their time spent working on a ticket.

Listing tickets

A **ticket list** is a listing of tickets, an example of which is shown below.

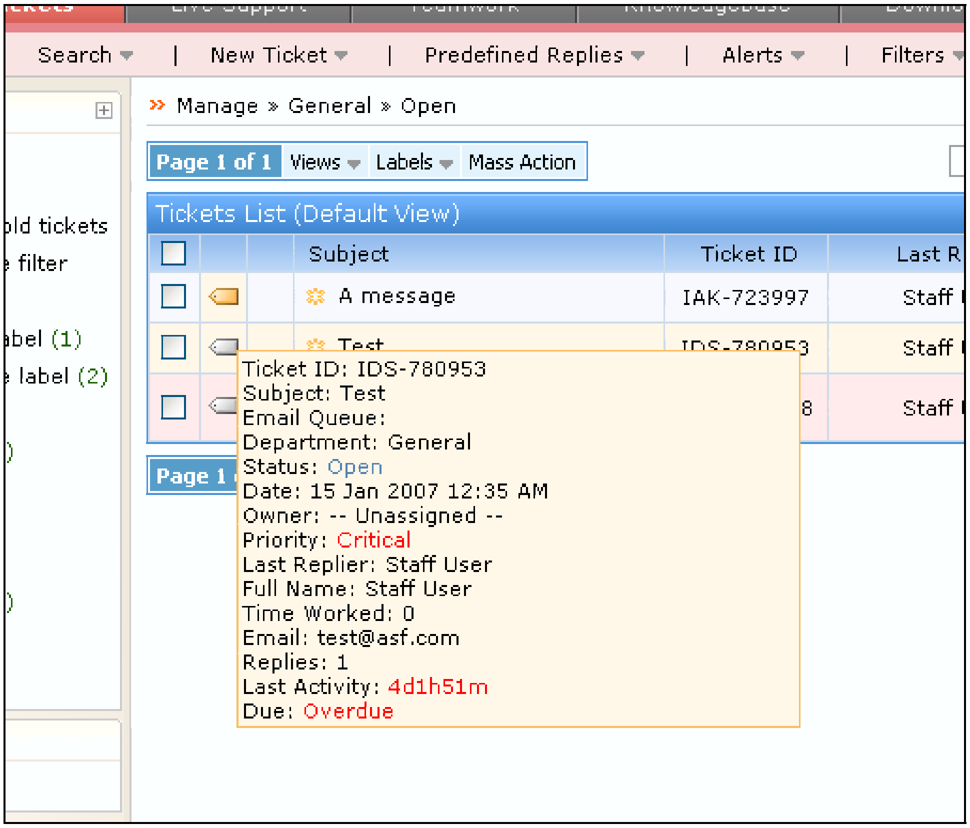


- **The current view** – the name of the ticket view currently being used. For more information on customized ticket views, see customized ticket listing view.

- **Ticket ownership indicator** – the red star indicates that the ticket is assigned to you (the staff user). For more information on ticket assignments, see ticket assignment / ticket ownership.

- **Ticket label indicator** – the ticket has one or more **label(s)** attached to the ticket. For more information on ticket labels, see ticket labels.

- **Updated ticket indicator** – this indicator will display as yellow if a new reply has been made to the ticket since your last visit. Hovering the mouse over this icon will give a brief ticket overview, as shown below.

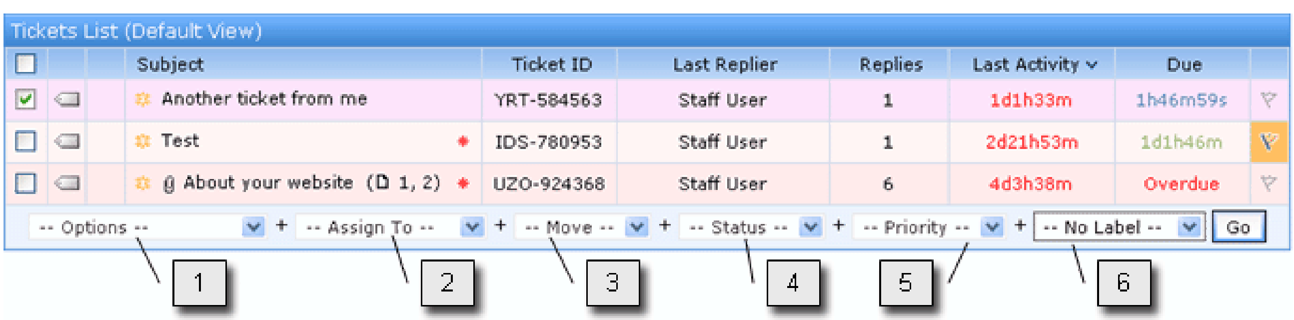


The ticket lists can be customized according to criteria configured by each staff user. For example, a ticket list can be generated that lists all open tickets. Customizing multiple ticket lists allows you to quickly sort through tickets.

Mass-managing tickets within the ticket list

On any ticket list, multiple tickets can be mass-managed using an additional toolbar that will appear in the view once more than one ticket has been "selected".

Selecting a ticket involves c**hecking the tick-box** of the appropriate ticket or by clicking on the **Mass Action** link, as shown below.



1. Options
2. Assign to

3. Move

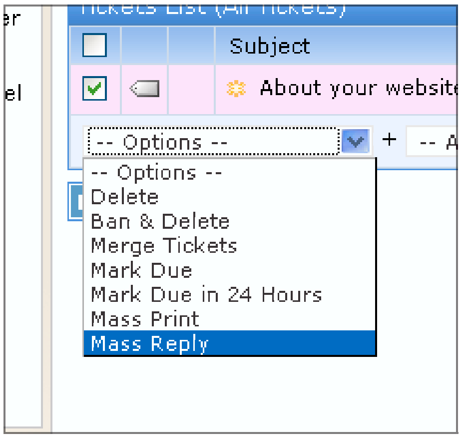
4. Status

5. Priority

6. Labels and flags

Options

The options menu opens a list of **ticket management tasks** that can be performed on the selected tickets, as shown below.



- **Delete** – delete the ticket(s) from the database. Ticket deletion cannot be undone.

- **Ban & Delete** – add the sender's address to the ban list and delete the ticket. Banning a sender's address will mean that any tickets sent from this address will not be processed. Ticket deletion cannot be undone. However, bans can be lifted via the administrator control panel (see e-mail bans in the administrator control panel).

- **Merge Tickets** – combine the contents of multiple tickets (ticket postings and responses will be merged together chronologically).

- **Mark Due** – the tickets will be marked as due for action.

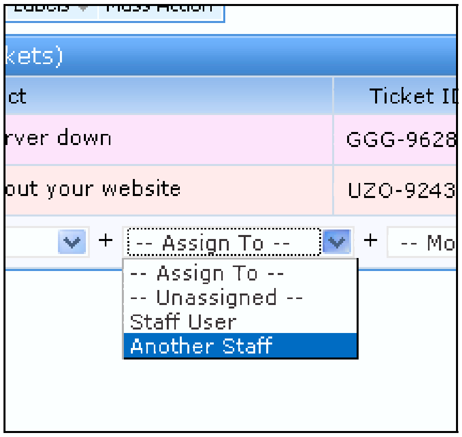
- **Mark Due in 24 Hours** – the tickets will be marked as due for action in 24 hours.

- **Mass Print** – all of the selected ticket(s) and their contents will be combined into a printer-friendly view.

- **Mass Reply** – send one reply to multiple tickets.

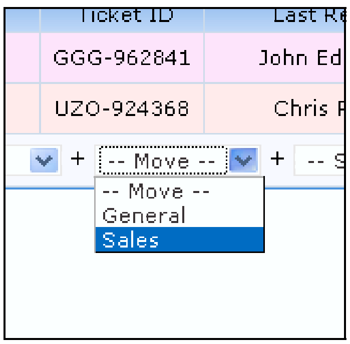
Assign to

Opening this menu will list **staff members** to who the ticket(s) can be assigned, as shown below. For more information on ticket assignments, see ticket assignments.



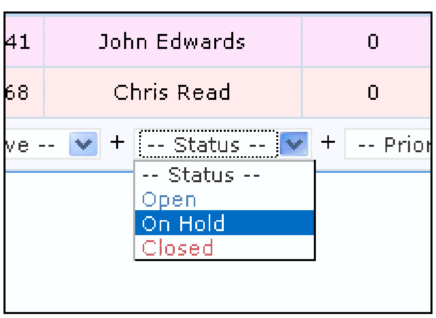
Move

Clicking on this menu will open a list of **departments** to which the ticket can be moved (transferred). Departments are managed and configured in the administrator control panel (see departments in the administrator control panel).



Status

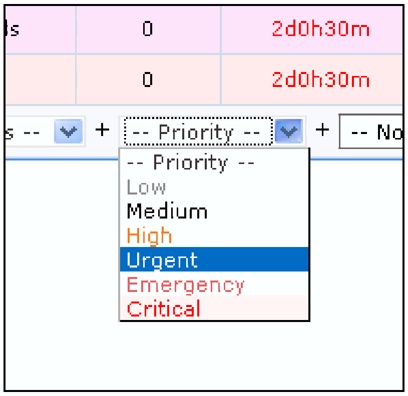
Clicking on this menu will open a list of **statuses** that the selected ticket(s) can be changed to, as shown below. For more information on ticket statuses and how they are used within the staff control panel, see ticket status.



Ticket statuses are configured in the administrator control panel (see ticket statuses in the administrator control panel).

Priority

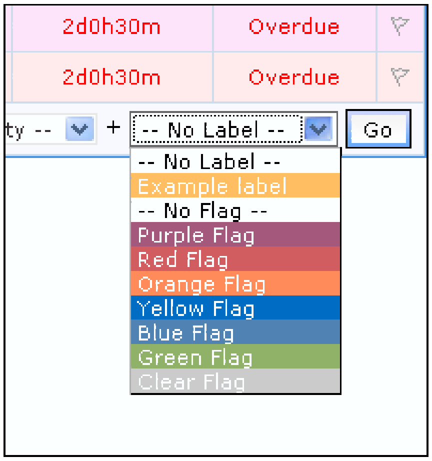
Clicking on this menu will open a list of **priorities** that the selected ticket(s) can be set to, as shown below. For more information on how ticket priorities are used in the staff control panel, see ticket priority.



Priorities are defined in the administrator control panel (see ticket priorities in the administrator control panel).

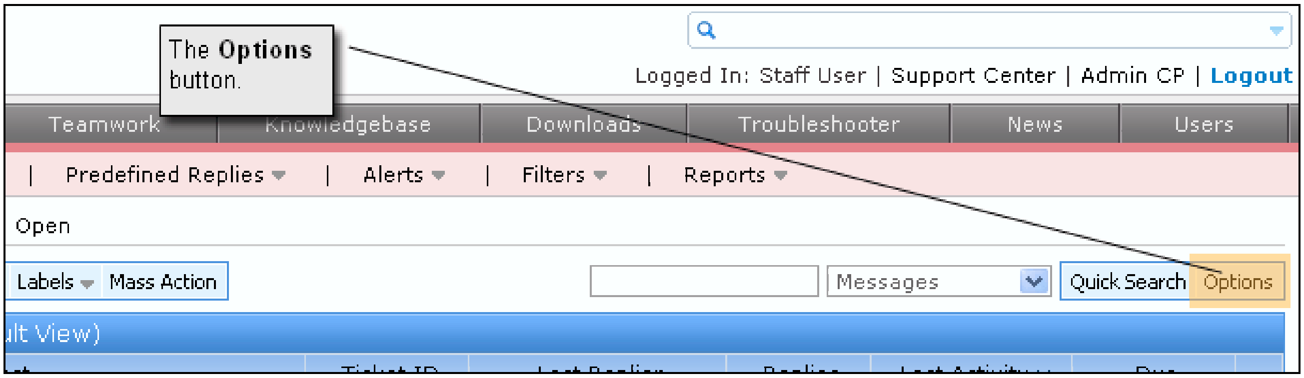
Labels and Flags

Clicking on this menu will open a list of **labels and flags** that can be attached to the selected tickets, as shown below. For more information on labels and flags are used in the staff control panel, see ticket labels and ticket flags.

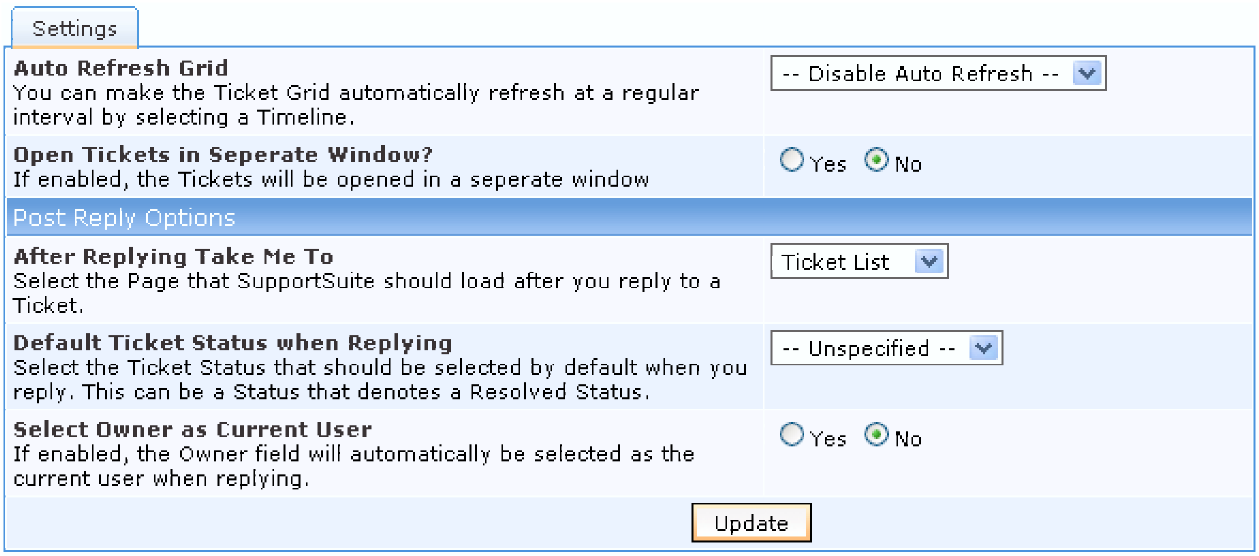


Ticket listing area options and preferences

The ticket list options can be accessed by clicking on the **Options** button, as shown below.



Clicking on this button will expand the list options interface, as shown below.



Ticket listing options affect all ticket listings viewed under your staff user account.

- **Auto Refresh Grid** – enabling this option will cause the ticket list to refresh itself periodically at an interval set here.
- **Open Tickets in Separate Window** – if enabled, clicking on a ticket subject from within a ticket list will open the ticket in new browser window, as opposed to opening within the same browser window.
- **After Replying Take Me To** – this option defines where you will be taken after replying to a ticket. It can be set to one of:
    - **Ticket** (the ticket replied to)
    - **Ticket List**
    - **Next Ticket**
- **Default Ticket Status when Replying** – this option allows for the selection of a default ticket status that a ticket will be set to following your reply. For example, if replying to a closed ticket while this option has been set to open, the ticket's status will be set to open following your reply.

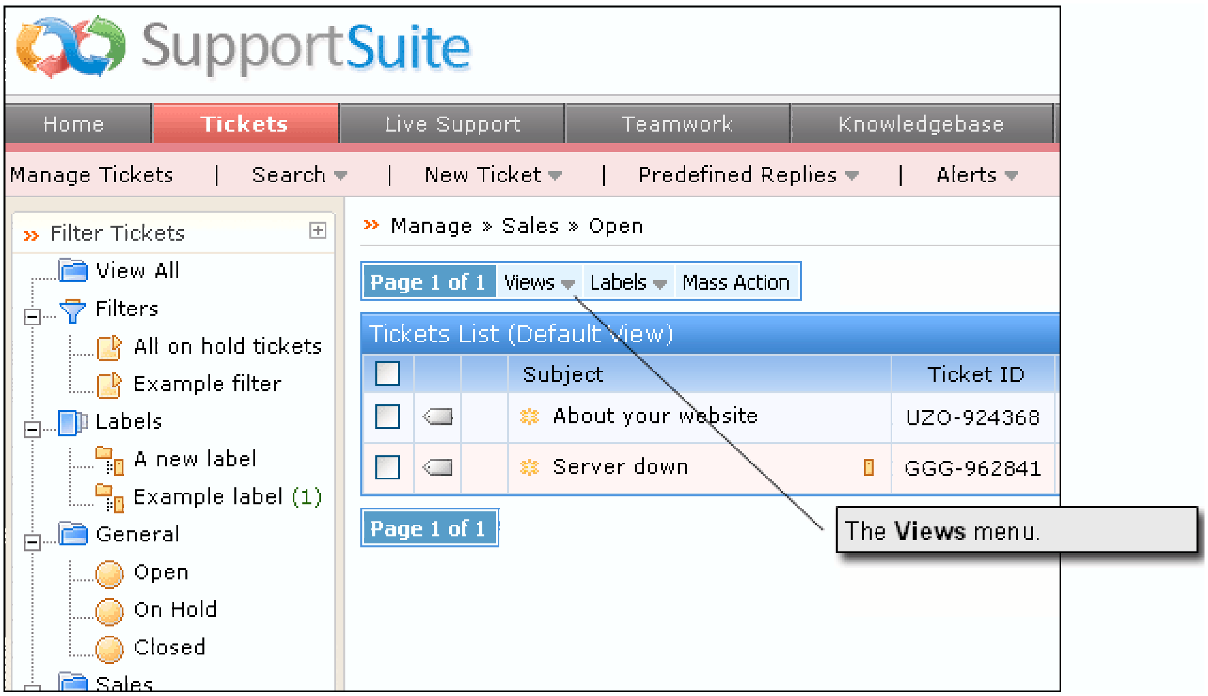
- **Select Owner as Current User** – if enabled, a ticket will be assigned to the staff user who first replies to a ticket.

Click on the **Update** button for the changes to take effect.

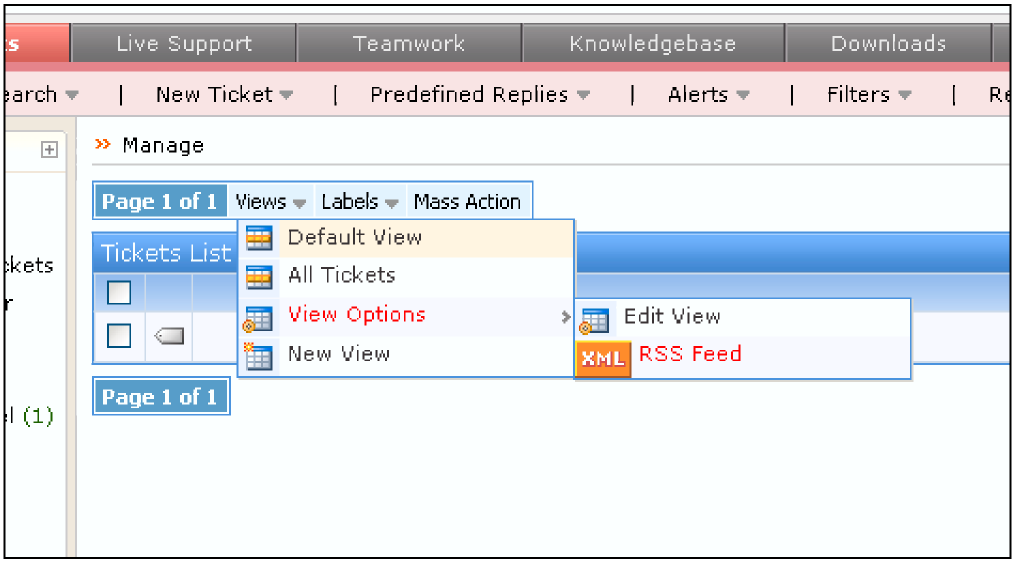
Customizing your ticket lists

From within a ticket list, the “view” of the list of tickets can be customized. Listing **templates** can be created to display a list of tickets in a particular way. For example, the information for the tickets shown in a list can be customized.

When viewing a ticket list, the **ticket listing view** can be changed by clicking the **Views** menu, as shown below.

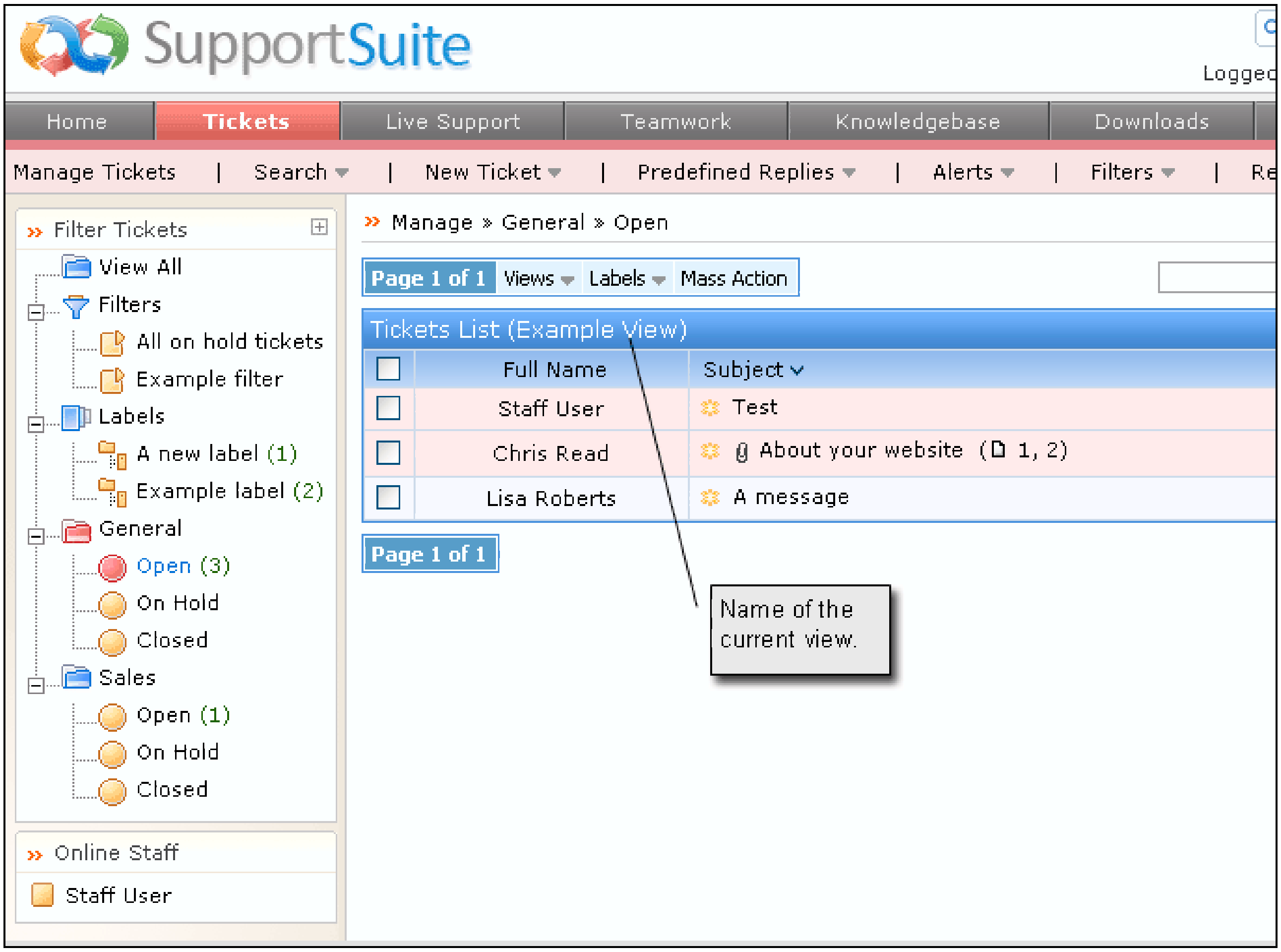


Clicking this menu will open the **ticket listing views menu**, as shown below.



- **Default View** – the standard ticket list view. Opening this view will restore all the default ticket listing columns. Any saved custom view will not be erased, and will still be selectable.
- **All Tickets** – a view of all tickets that are set to open.
- **View Options** – options that allow editing and deletion of the current ticket listing view, applicable if you have a customized ticket list view open.
- **Edit View** – edit the current open ticket listing view. For information on editing ticket listing views, see creating a new ticket listing view.
- **RSS Feed** – a RSS feed of the tickets listed within the current open ticket listing view. See what is an RSS feed, in the frequently asked questions.
- **New View** – create a new, customized ticket listing view. See creating a new view for more information.

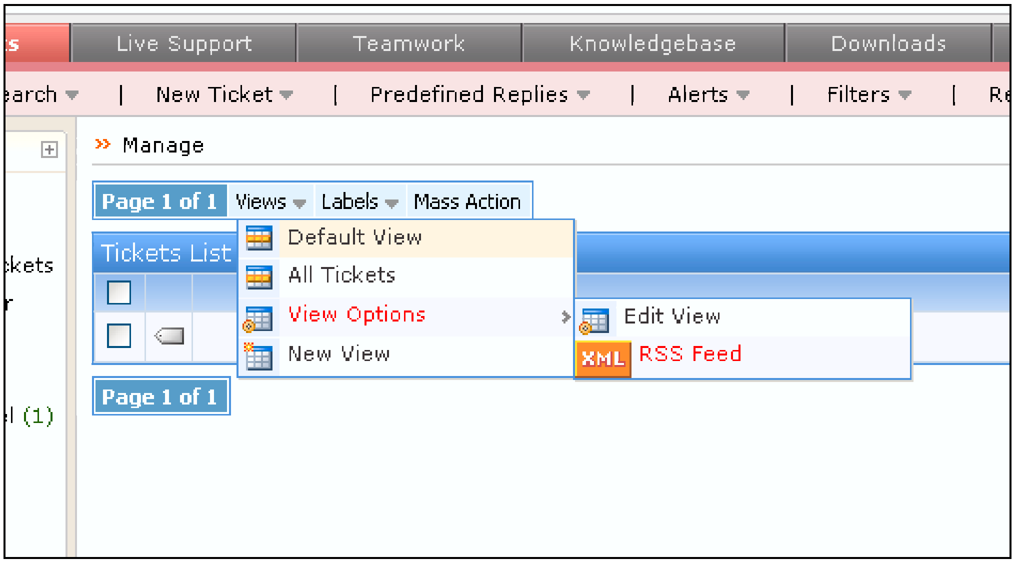
When opening a view, the name of the view will be shown on the ticket listing as indicated below.



Creating a new ticket listing view

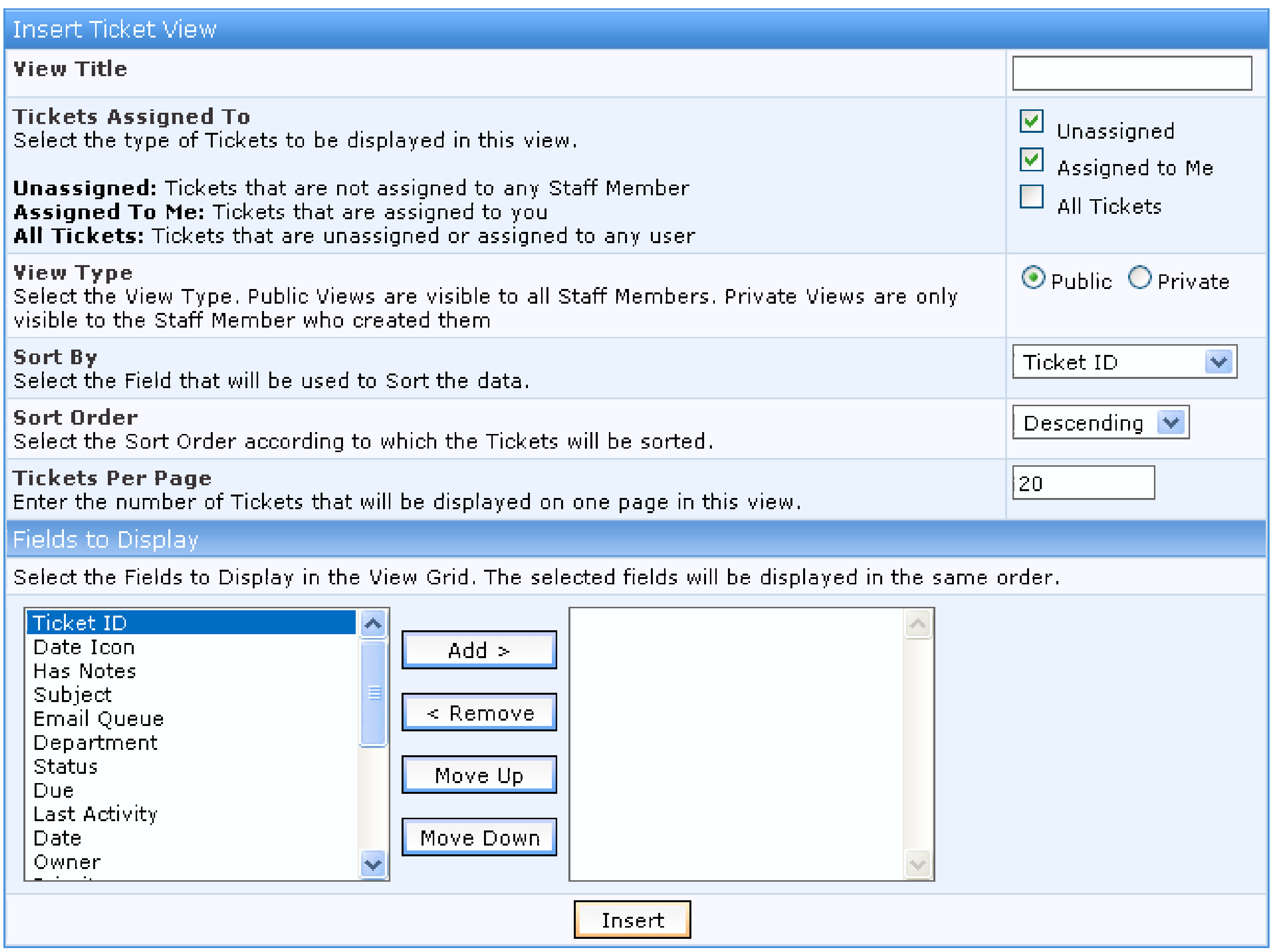
To create a new ticket listing view:

1. From within a ticket list, click on the views menu, as shown below.



2. Click on the **New View** option.

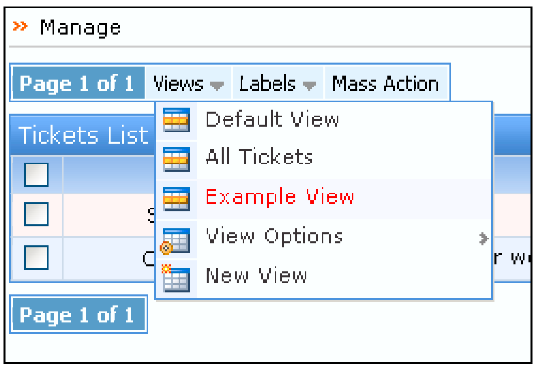
3. An interface similar to the following will be opened.

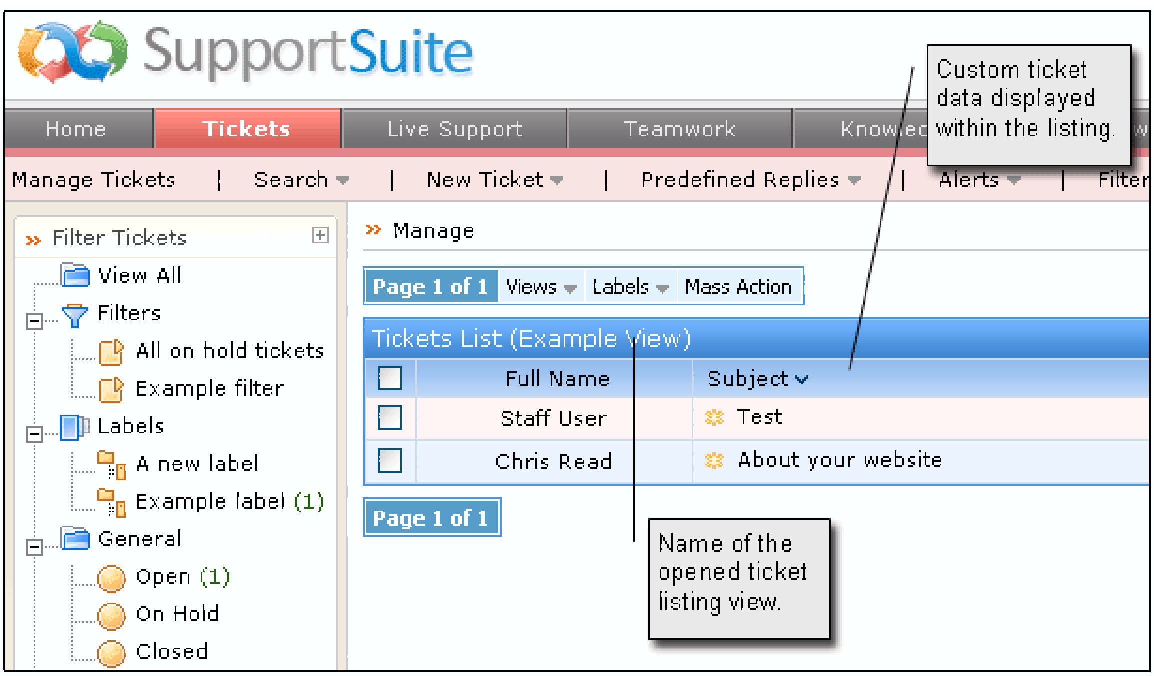


- **View Title** – the name of the ticket listing view.
- **Tickets Assigned To** – these ticket assignments will be shown within the ticket listing view.
- **View Type** – if set to public, the ticket listing view will be available to all staff users. If set to private, the view will be available only to you.
- **Sort By** – by what data the tickets will be sorted (such as ticket ID, last response time, subject etc).
- **Sort Order** – whether the tickets will be sorted from top-to-bottom (ascending) or bottom-to-top (descending).
- **Tickets Per Page** – the numbers of tickets to list per page.
- **Fields to Display** – the fields that will be displayed within the ticket listing view.

An example of a customized ticket listing view, set to display all tickets and show only the ticket subject and ticket creator fields is shown below.

The new customized view can be opened from within the **Views** menu:

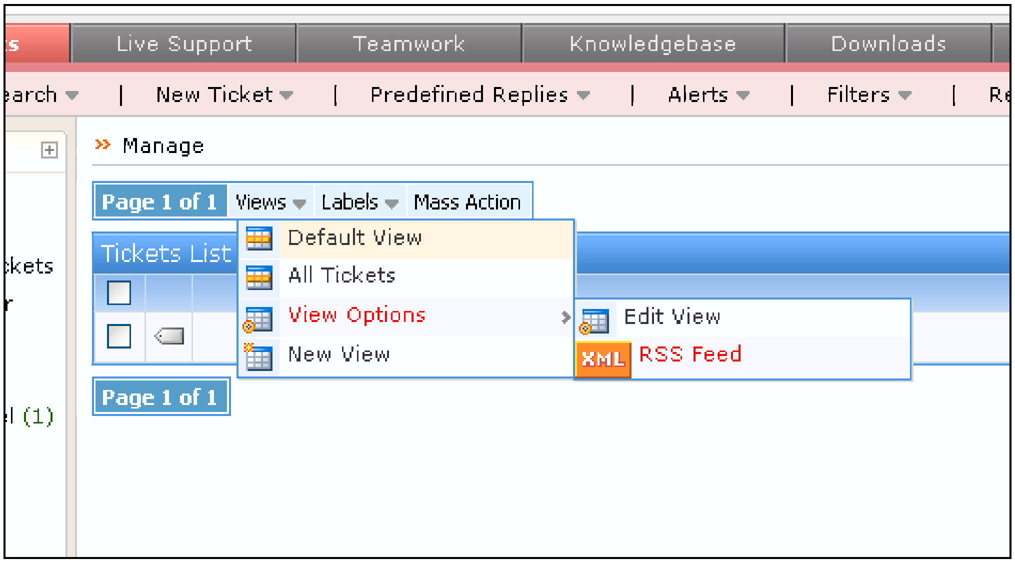




Deleting a ticket listing view

To delete a ticket listing view:

1. From within a ticket list click on the **Views** menu, as shown below.

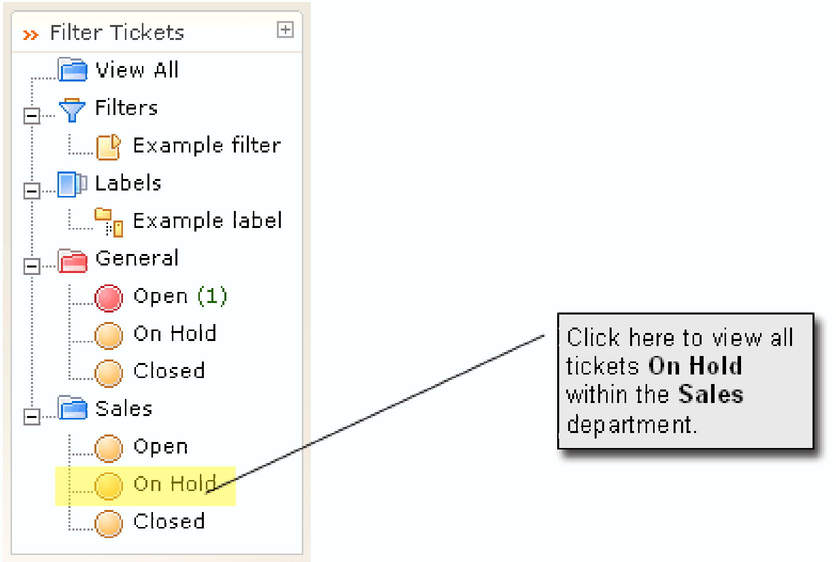


2. Click on the **View** you wish to delete.
3. Open the **Views** menu again.
4. Hover over **View Options**.
5. Click **Delete View**.

Viewing tickets by department

Tickets of a certain status are directly accessible within the SupportSuite interface without you having to create a customized view.

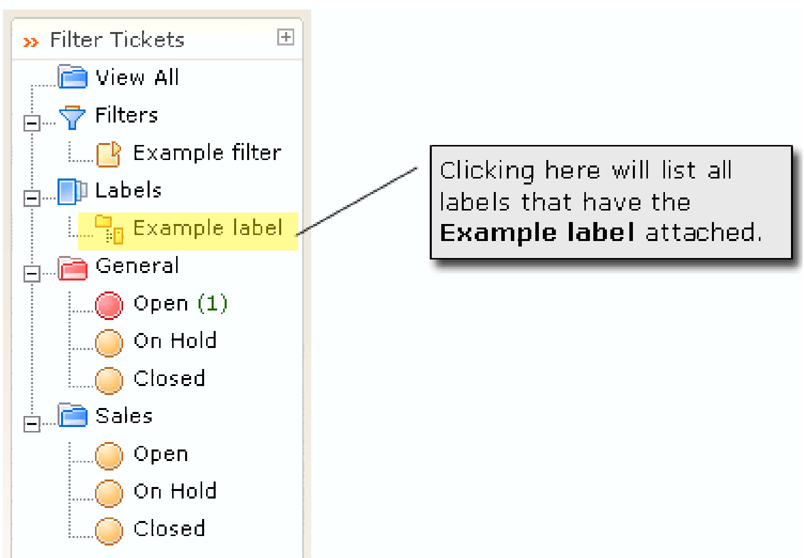
Under the department and ticket tree (as shown below), click on the **status** under the **department** you wish to view.



Departments are configured in the administrator control panel (see departments in the administrator control panel).

Viewing tickets by label

Under the department and ticket tree (as shown below), click on the **label name** you wish to view tickets by.

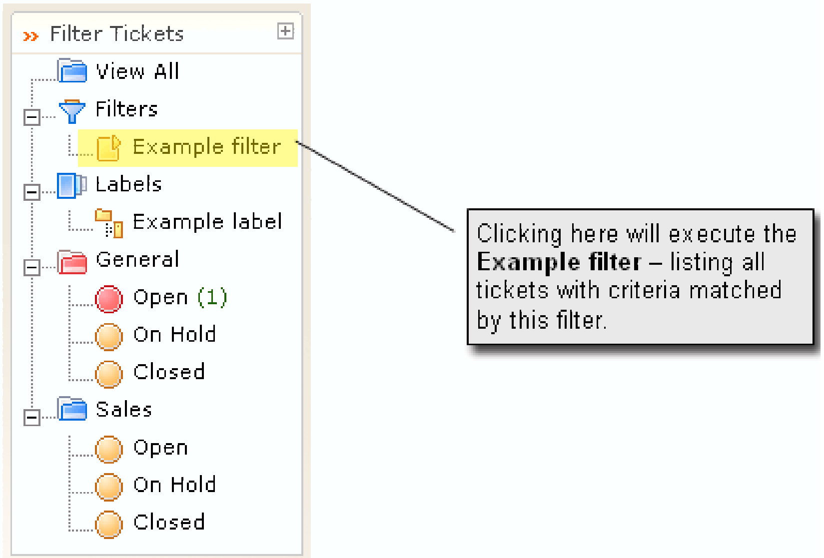


Ticket labels are created and managed in the staff control panel. For more information, see ticket labels.

Viewing tickets by filter

Ticket filters can be executed directly within the SupportSuite interface without you having to create a customized view. Executing a ticket filter will list all tickets that match a filter's criteria.

Under the department and ticket tree (as shown below), click on the **filter name** you wish to filter tickets by.



Ticket filters are created and managed in the staff control panel. For more information, see ticket filters.

RSS feeds of tickets

RSS feeds of tickets can be generated and customized using **ticket listing views**. For more information, see the RSS Feed option described in customized ticket listing views. Also see what is an RSS feed, in the frequently asked questions.

Organizing and searching tickets

There are several features of SupportSuite that allow for easy organizing and management of tickets within the staff control panel.

Tickets primarily reside in a department. A ticket within a department can then have a status that is specific to the ticket's residence within a department. On top of this, a ticket can have a global label (that is not specific to it's department).

Ticket departments

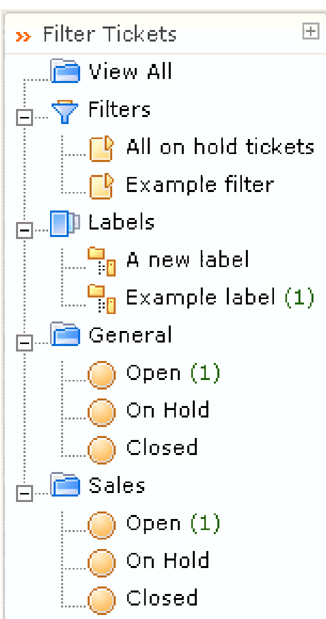
Tickets are stored in **departments**. A typical set of departments may be Sales, Support and Enquiries. Departments are managed and configured in the administrator control panel (see departments in the administrator control panel).

Ticket status

Every ticket has a **status**. The system default ticket statuses are **Open**, **Closed** and **On Hold**. As well as having a default set of statuses, it is also possible to create custom statuses (see statuses in the administrator control panel).

Viewing tickets by status

Tickets can be listed by status by clicking on a respective **ticket status** on the department and ticket tree (if the visibility of the status on the department and ticket tree has been set to visible within the administrator control panel, see departments in the administrator control panel), as shown below.

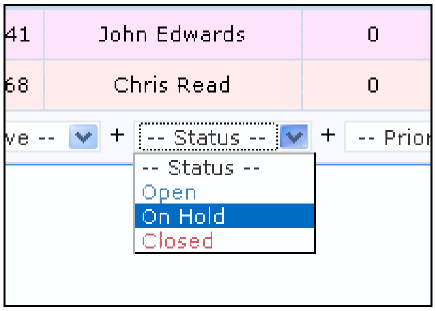


Tickets (either hidden from the department and ticket tree or not) can also be viewed by status using ticket filters.

Changing the status of a ticket

To change the status of multiple tickets from within a ticket listing:

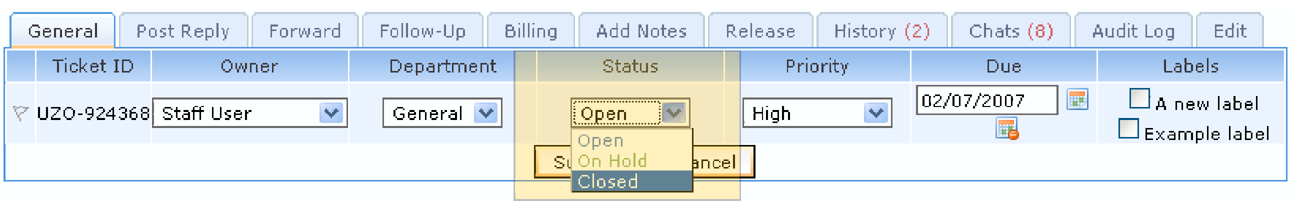
1. Select one or more tickets by checking the corresponding check-boxes.
2. On the **mass-management menu** (as shown below), click on the **Status** menu.



3. Select a **Status** for the ticket(s).
4. Click on the **Go** button to proceed with the changes.

To change the status of a ticket from within a ticket view:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.



2. Click on the **Status** menu.
3. Select a **Status**.
4. Click on the **Submit** button to proceed with the changes.

Ticket priority

Each ticket has a **priority**. The priority of a ticket is a way of ordering importance or urgency. By default, SupportSuite and eSupport adds the following priorities to the system:

- Critical
- Emergency
- Urgent
- High

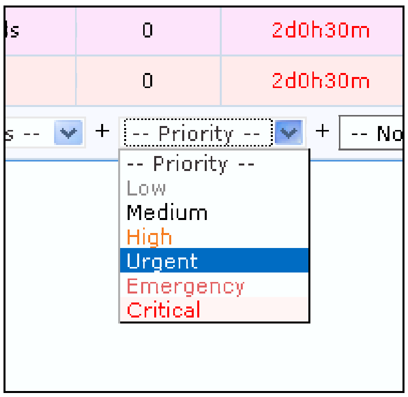
- Medium
- Low

Priorities are customized (such as adding or removing levels of priority that can be given to tickets) in the administrator control panel (see ticket priorities in the administrator control panel).

Changing the priority of a ticket

To change the priority of multiple tickets from within a ticket listing:

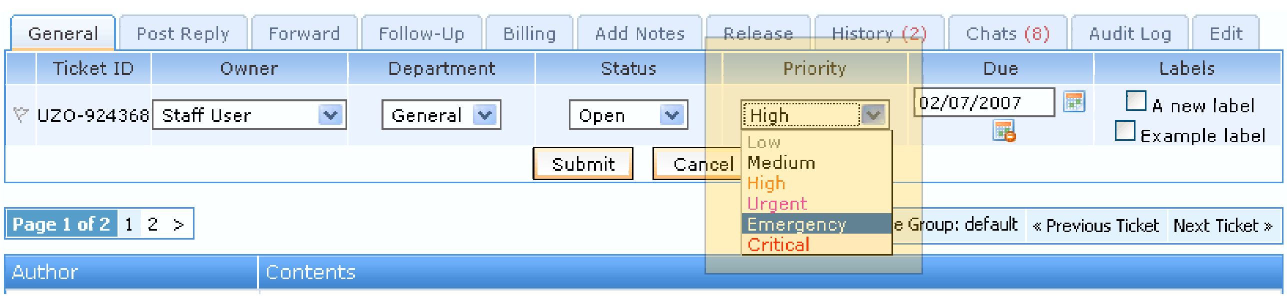
1. Select one or more tickets by checking the corresponding check-boxes.
2. On the **mass-management menu** (as shown below), click on the **Priority** menu.



3. Select a **Priority** for the ticket(s).
4. Click on the **Go** button to proceed with the changes.

To change the priority of a ticket from within a ticket view:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.



2. Click on the **Priority** menu.
3. Select a **Priority**.
4. Click on the **Submit** button to proceed with the changes.

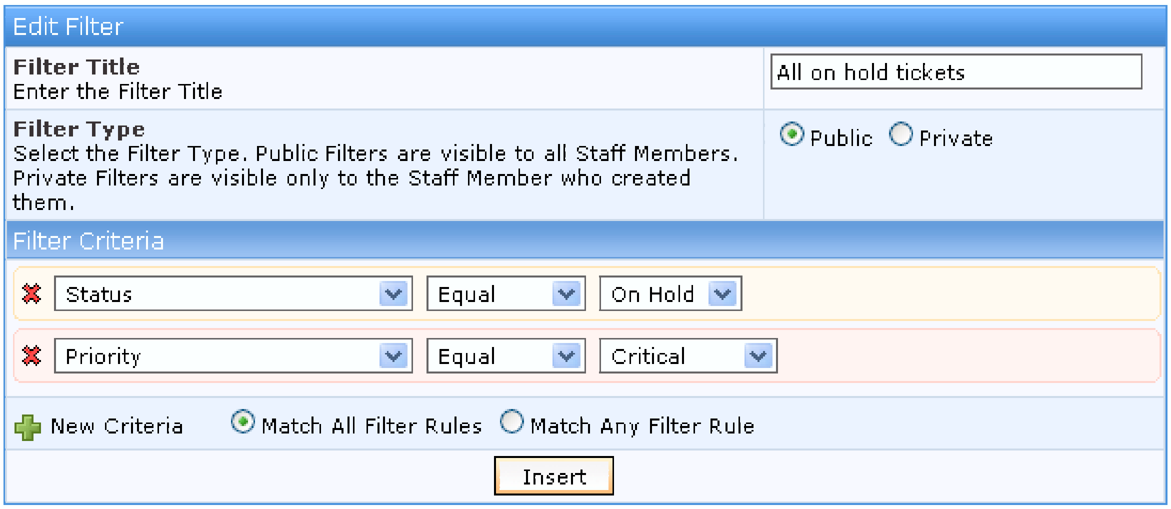
Ticket filters

Ticket filters allow you to quickly access and sort through your tickets across all departments by setting a variety of filter criteria.

Filters can be created **publicly** or **privately**. A private ticket filter is only accessible by the staff user who created it, meaning that staff members can create and manage their own ticket filters.

When created, a ticket filter will appear in the department and ticket tree. When a filter is executed (clicked on), a ticket listing of all tickets that match the filter's criteria will be displayed.

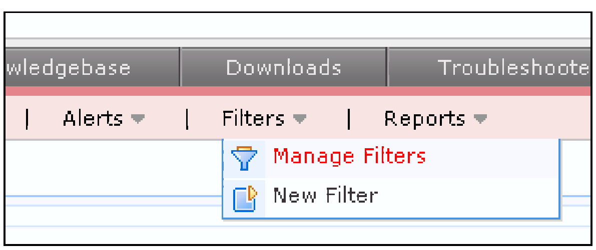
An example ticket filter is shown below. It has been created to display all tickets that have been set to "On Hold" that have a "Critical" priority:



Creating a ticket filter

To create a ticket filter:

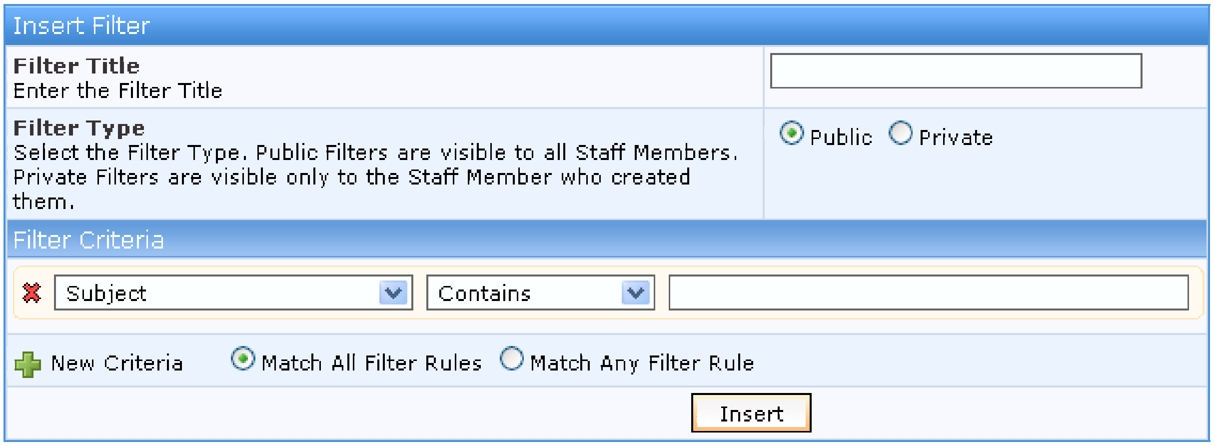
1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Filters** sub-menu.

3. Click **New Filter**.

You will be presented with the **Insert Filter** form, as shown below.



- **Filter Title** – this is the name of the filter. It will be displayed on the department and ticket tree.
- **Filter Type** – setting the filter type to public will mean all staff users will see and be able to use this ticket filter. If set to private, the filter will only be visible to the staff user who created it.
- **Filter Criteria** – criteria that tickets will be filtered by when this filter is executed.
- **Match All Filter Rules** – only tickets that match all of the criteria you have set will be listed when this filter is executed.
- **Match Any Filter Rule** – only tickets that match any of the criteria you have set will be listed when this filter is executed – if you have set three criteria and a ticket matches one of them, the ticket will still be listed.

Click on the **Insert** button to create the new filter.

Filter matching types

"Contains"

The filter will **match** if the string entered is **present anywhere** within the **field** (subject, e-mail address etc.).

Example:

- Subject field: Regarding your website
- Filter type: Contains
- String: aeroplane
    - The filter will not match.

"Doesn't Contain"

The filter will **match** if the string entered is **not present anywhere** within the **field** (subject, e-mail address etc.).

Example:

- Subject field: Regarding your website
- Filter type: Contains
- String: website
    - The filter will not match.

"Equal"

The filter will **match** if the string entered is **exactly the same** as the **field** (subject, e-mail address etc.).

Example:

- Subject field: Regarding your website
- Filter type: Contains
- String: Regarding your website
    - The filter will match.

"Not Equal"

The filter will **match** if the string entered is **not exactly the same** as the **field** (subject, e-mail address etc.).

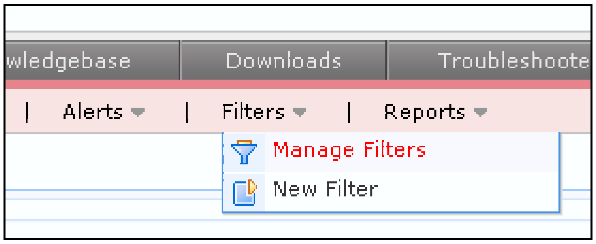
Example:

- Subject field: Regarding your website
- Filter type: Contains
- String: Hello!
    - The filter will match.

View and manage ticket filters

To manage ticket filters:

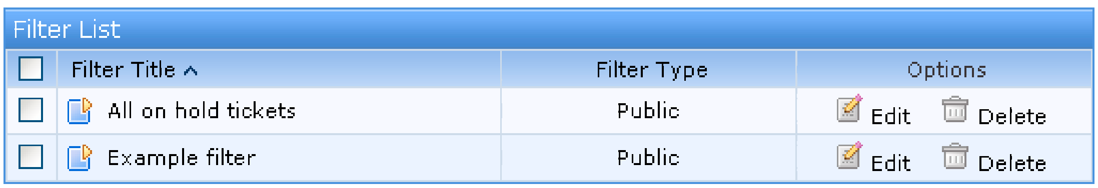
1. Open **Tickets** on the navigation menu bar, as shown below.



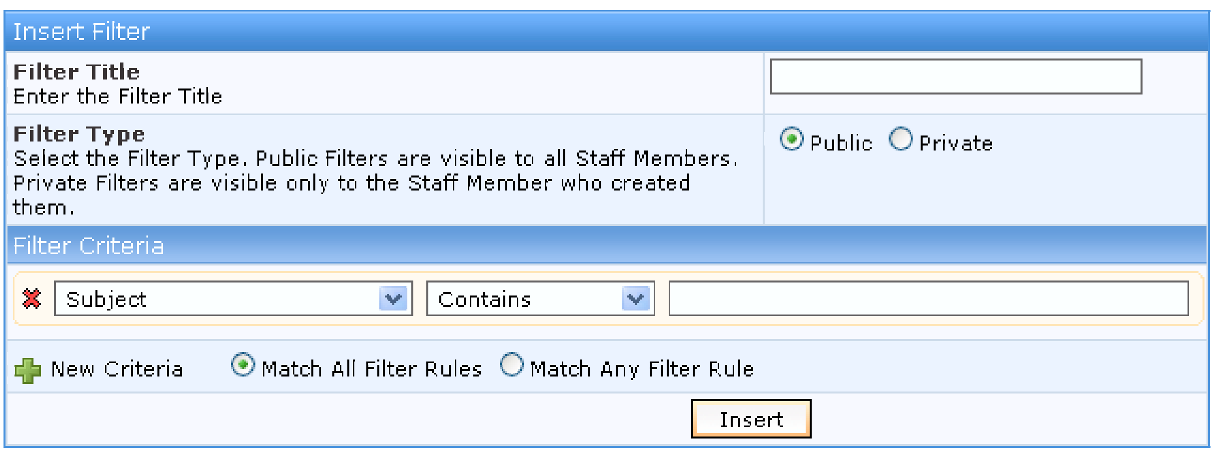
2. Open the **Filters** sub-menu.

3. Click **Manage Filters**.

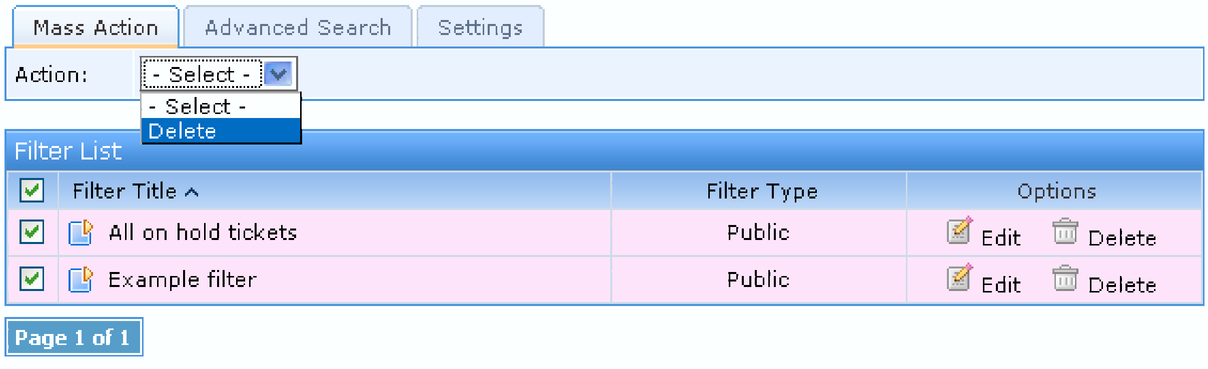
You will be presented with a list of existing filters, as shown below.



To edit a filter, click on the corresponding **Edit** button. To delete a filter, click on the corresponding **Delete** button.



Selecting multiple ticket filters (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, filters can be mass-deleted. Under the **Advanced Search** tab, filters can be searched for by name. Under the **Settings** tab, the number of filters shown per page (if there are many) can be limited.

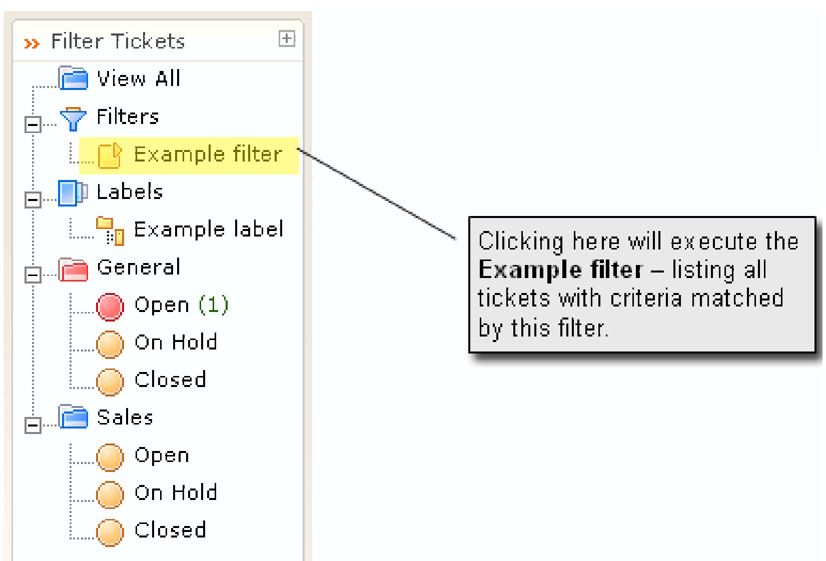


For more information on the field and criteria options for ticket filters, see creating a ticket filter.

Listing all tickets that match a filter

Ticket filters can be executed directly within the SupportSuite interface without having to create a customized view. Executing a ticket filter will list all tickets that match a filter's criteria.

1. Under the department and ticket tree (shown below), click on the **filter name** you wish to filter tickets by.

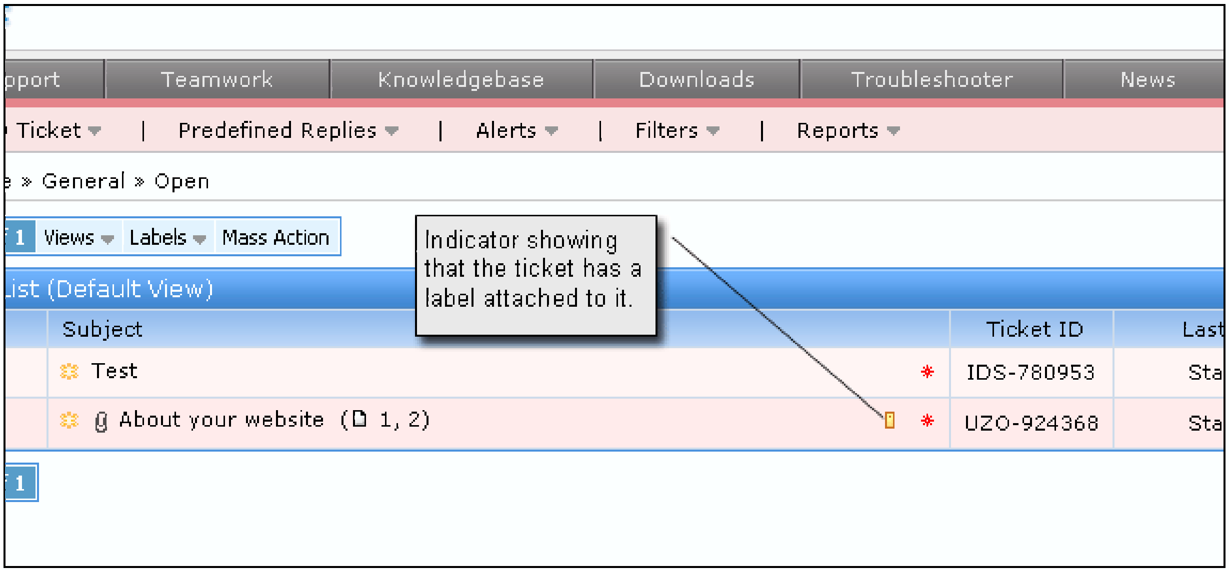


Ticket filters are created and managed within the **staff control panel**. For more information on ticket filters, see ticket filters.

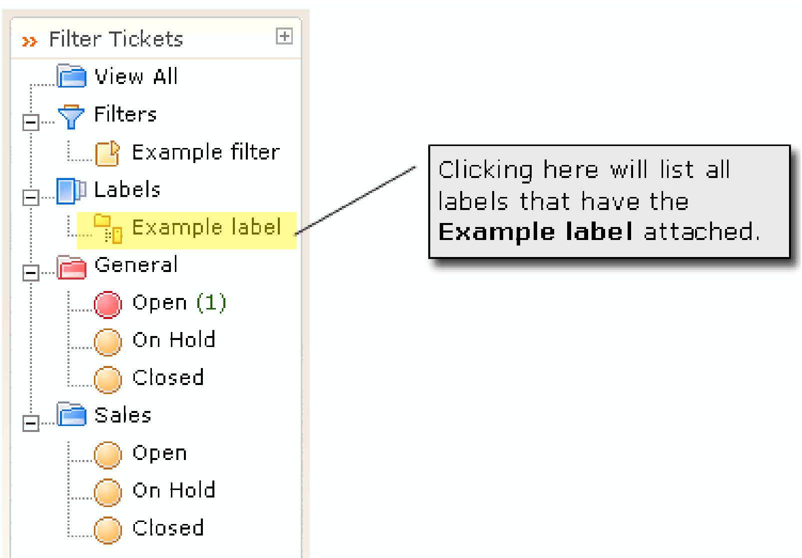
Ticket labels

A ticket label can be attached to a ticket. A label can have a name and a color. When a label is attached to a ticket, the labeled ticket will have the following properties:

1. The ticket will show a **small colored indicator** on a **ticket list** corresponding to the color set for the label, as shown below.



2. The ticket (among others that have had the same label attached to it) can be instantly filtered by a label via the department and ticket tree (as shown below). Clicking on a label will list all tickets that have the label attached to them.

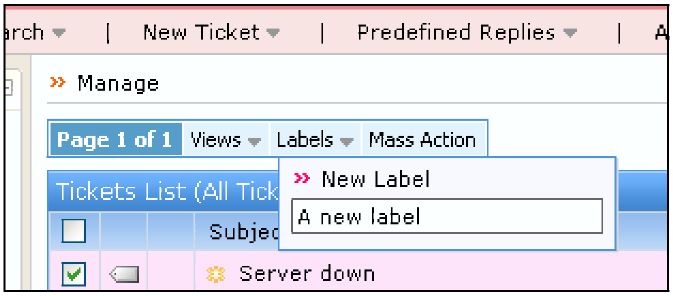


Creating a ticket label

To create a new ticket label from within a ticket list:

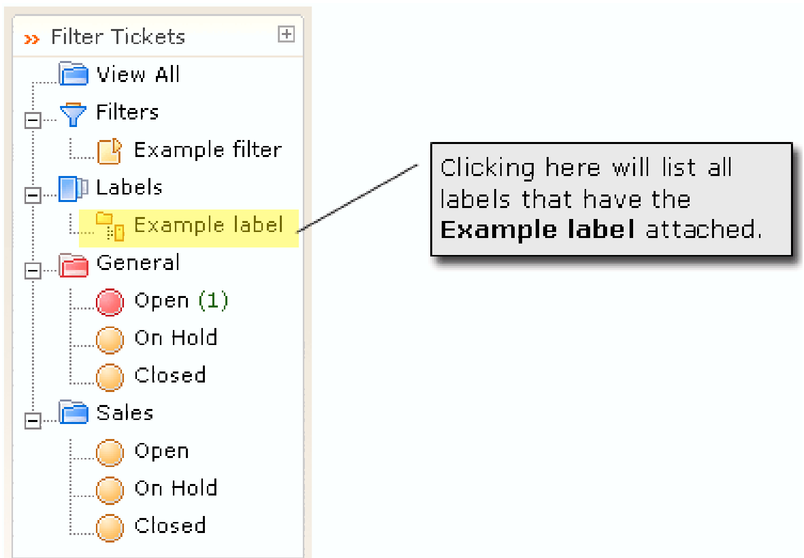
1. Click on the **labels** menu above the ticket listings.

2. Type in a name for the label.



3. Press the enter key.

The page will refresh and the new label will be visible on the department and ticket tree, as shown below.

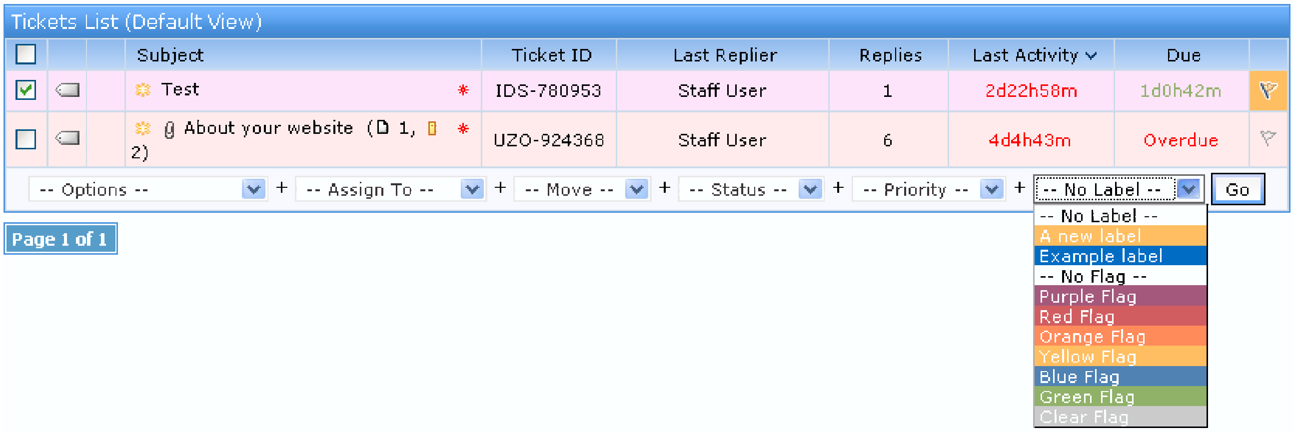


This label can now be attached to tickets.

Attaching a label to a ticket

To attach a label from within a ticket list:

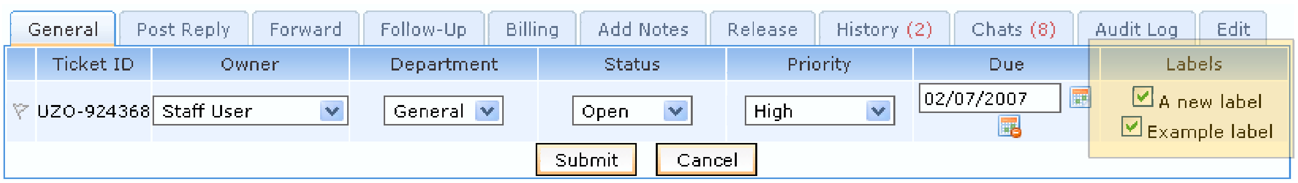
1. Select the tickets you wish to attach a label to.
2. The mass-management menu bar will be opened, as shown below.



3. On the **Labels/Flags** menu, select the appropriate label.
4. Click on the **Go** button to submit the changes to the tickets.

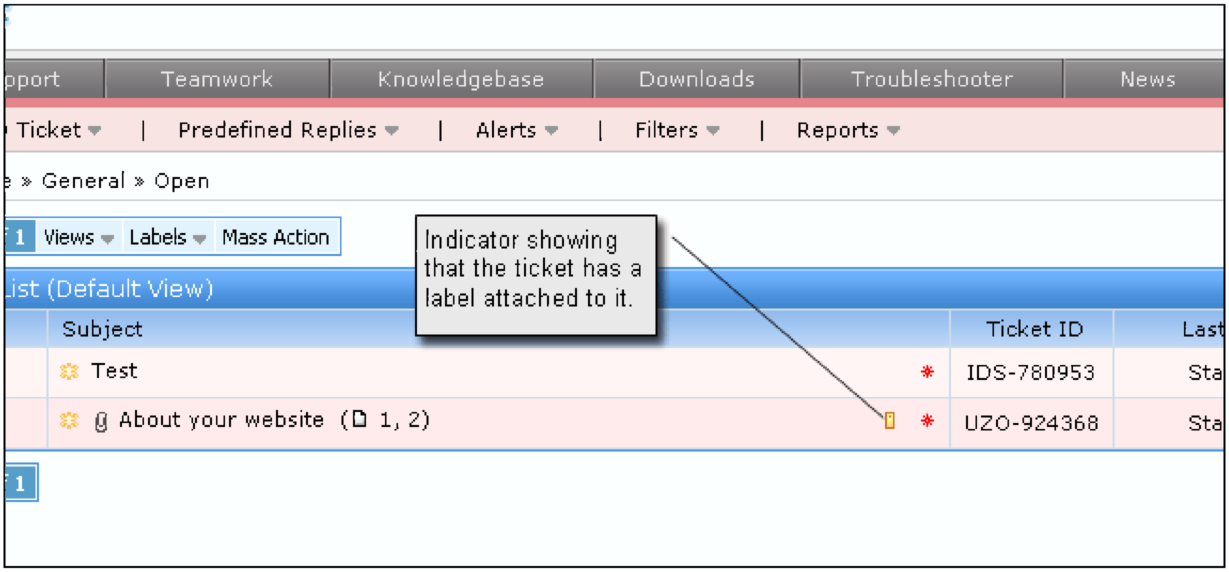
To attach a label from within a ticket view:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.

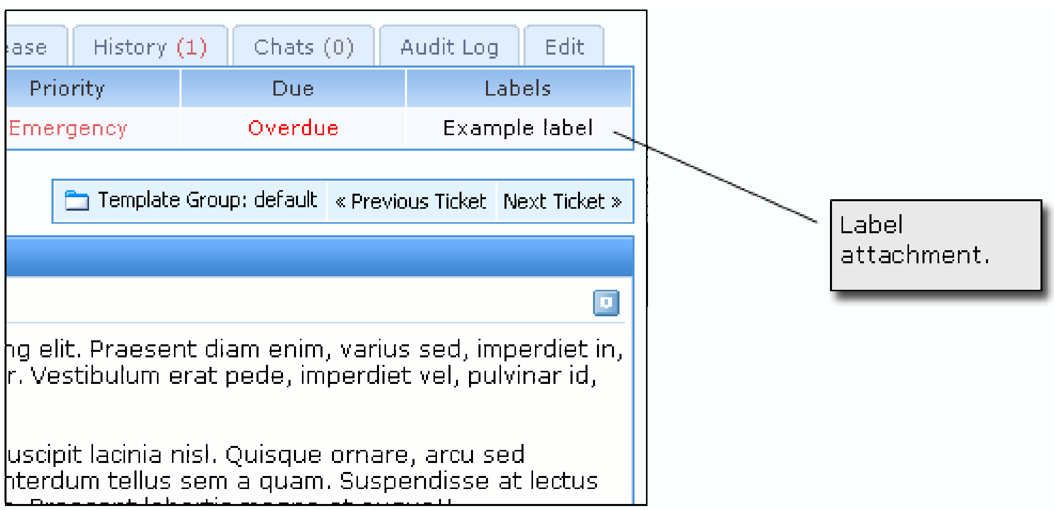


2. Click on the **Labels** menu.
3. Select one or more **Labels**.
4. Click on the **Submit** button to proceed with the changes.

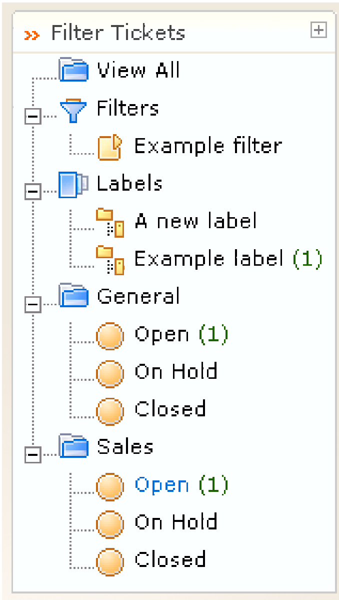
Going back to the ticket list, you will see that a new flag has appeared for this ticket – denoting that a label has been attached to it, as shown below.



Going back to the ticket, the **ticket management menu** will now show the label(s) that were attached to the ticket, as shown below.



On the department and ticket tree, the ticket count for the **Example label** has been updated to reflect the newly attached ticket, as shown below.

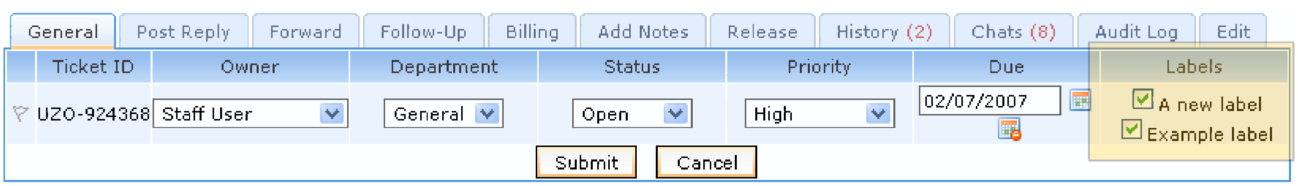


Removing a label from a ticket

Removing a label from a ticket is performed from within a ticket.

To remove a label from a ticket:

1. Click on the ticket's **ticket information bar** to make the bar editable, as shown below.

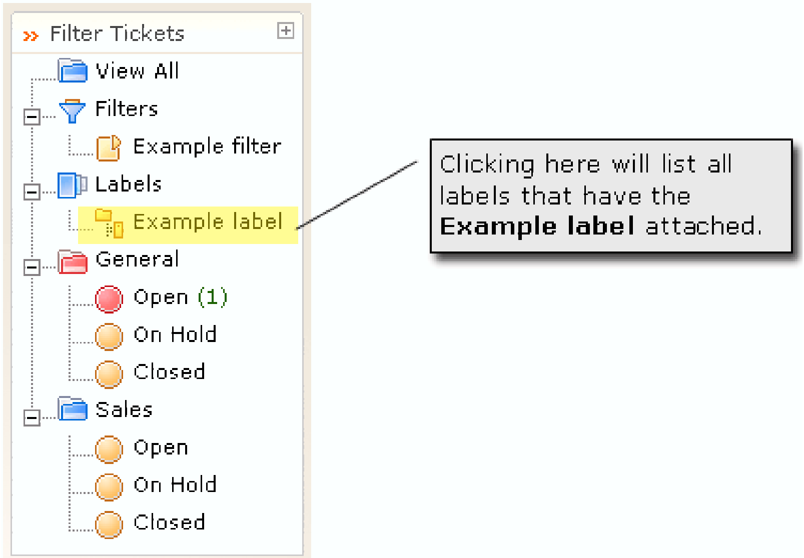


2. Click on the **Labels** menu.
3. Uncheck one or more **Labels** to remove labels.
4. Click on the **Submit** button to proceed with the changes.

Viewing tickets by label

Tickets with a **label** attached to them are directly accessible within the SupportSuite interface without having to create a customized view.

1. Under the department and ticket tree (shown below), click on the **label name** you wish to view tickets by.



Ticket labels are created and managed within the **staff control panel**. For more information, see ticket labels.

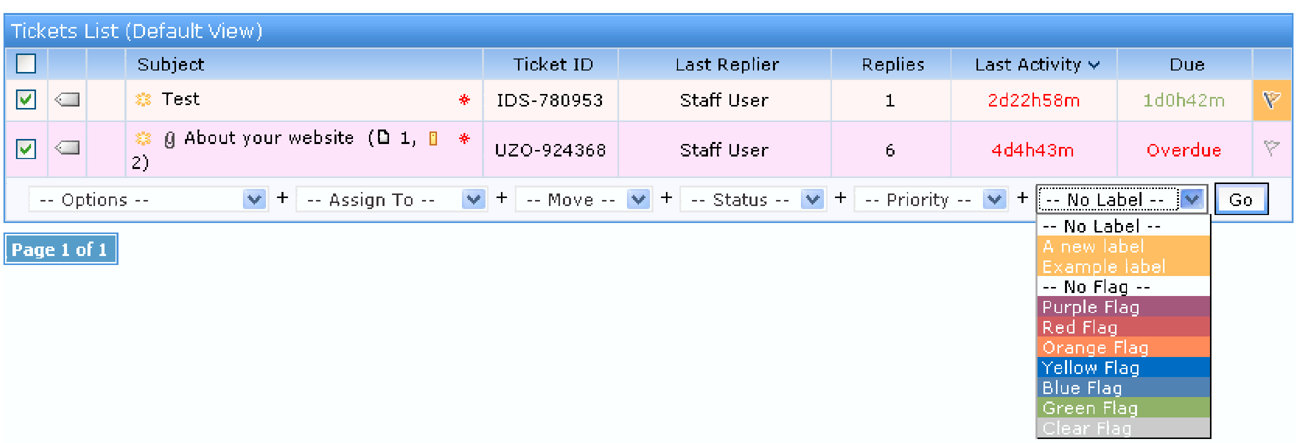
Ticket flags

A ticket can be **flagged** with a flag of a certain color. This functionality is useful for dynamically and quickly organizing tickets from within a ticket listing or ticket view.

Flagging a ticket

To flag a ticket from within a ticket list:

1. Select the tickets you wish to flag.
2. The **mass-management menu** will be opened, as shown below.

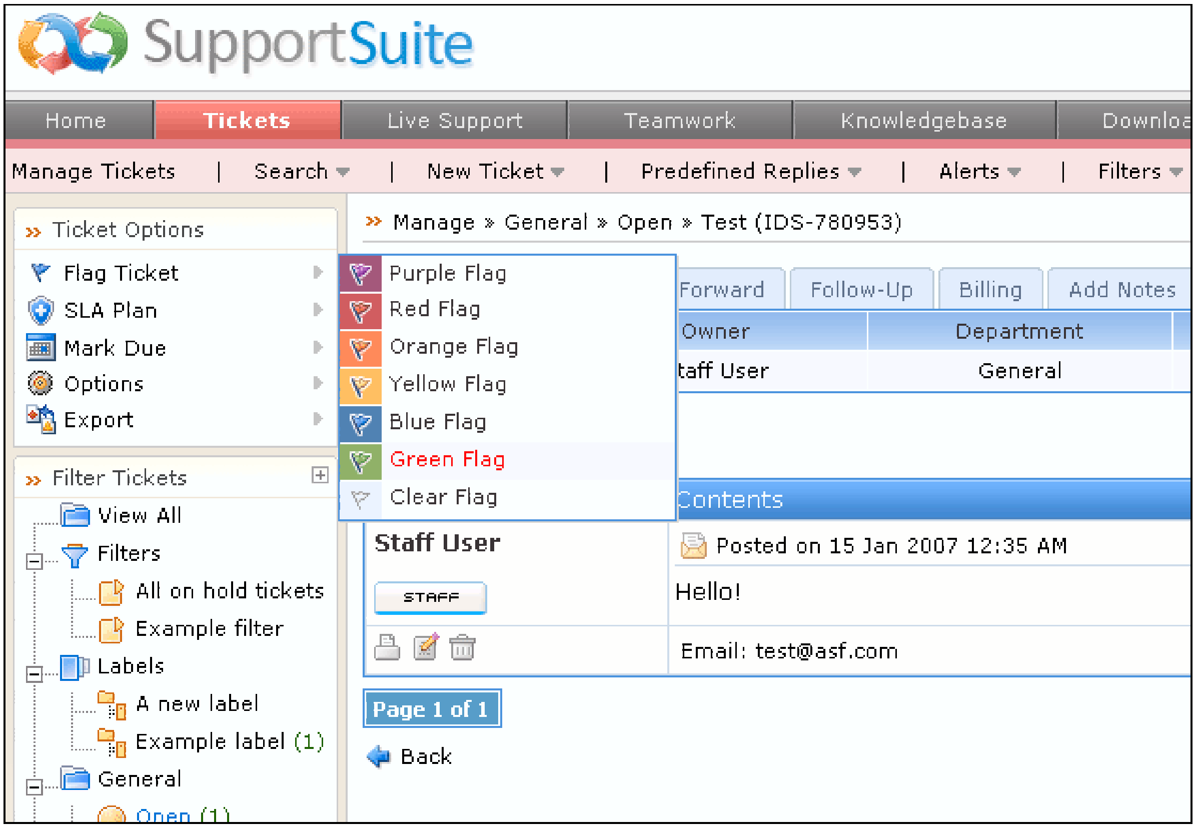


3. On the **Labels/Flags** menu, select the appropriate **Flag**.

4. Click on the **Go** button to submit the changes to the tickets.

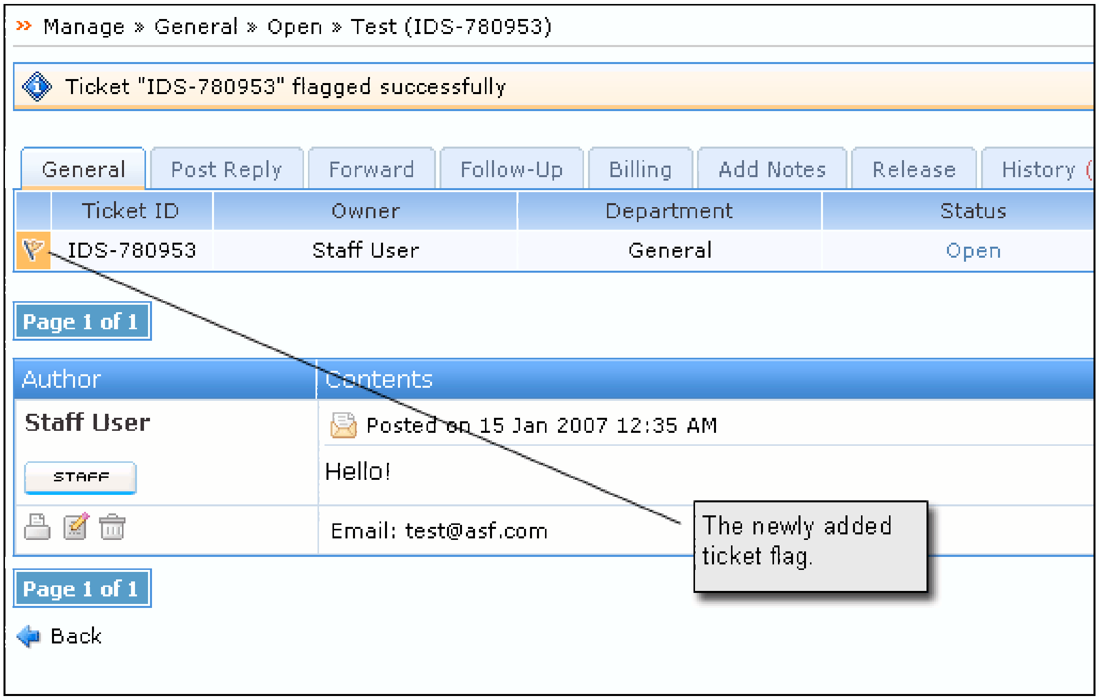
To flag a ticket from within a ticket:

1. On the **Ticket Options** menu, click **Flag Ticket** (as shown below).



2. Select the appropriate flag.

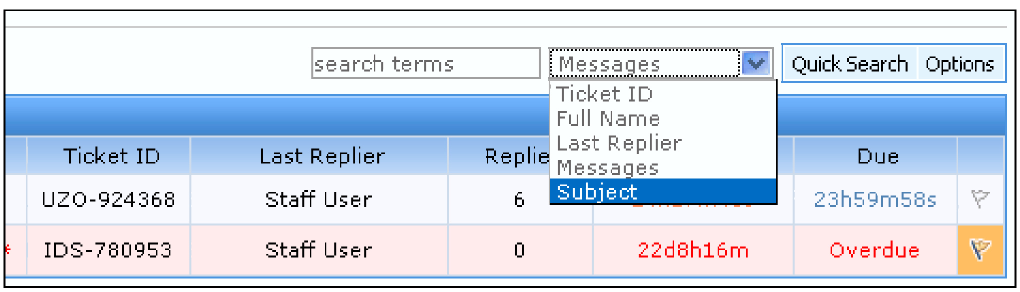
Note that the ticket information bar will now display the ticket flag, as shown below.



Searching tickets

Quick-search feature within a ticket listing

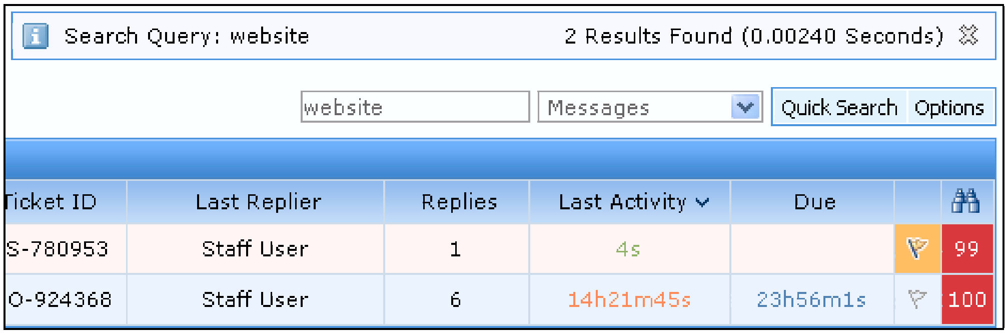
At the top of a ticket listing resides the **quick-search** box, as shown below.



Enter the **search terms** and then use the corresponding drop-down menu to select the **ticket field** you wish to search within.

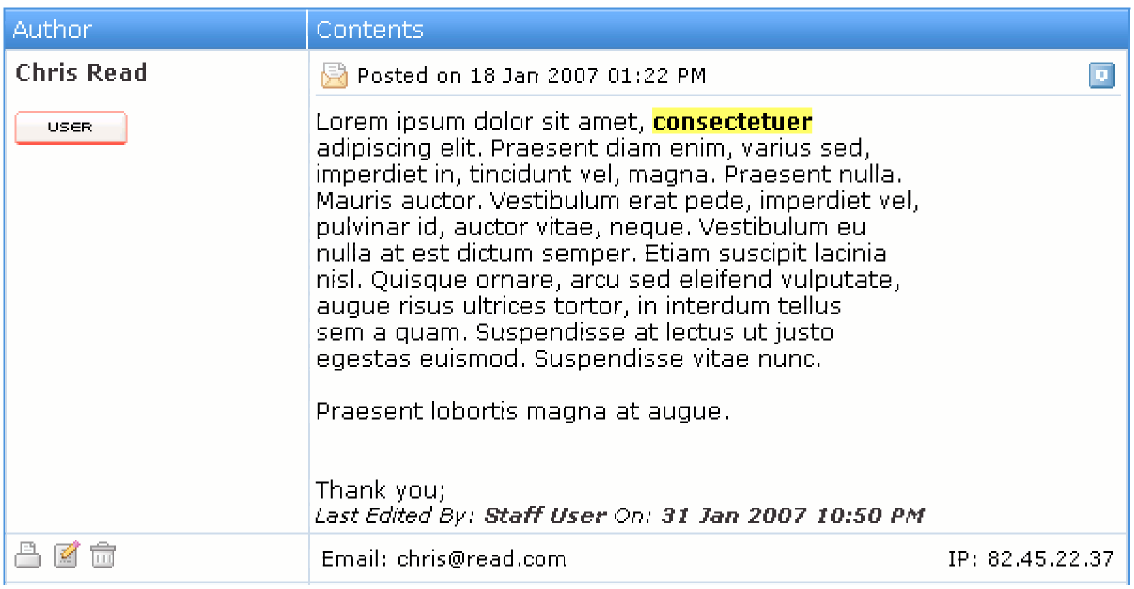
Press the **Quick Search** button to the right of the quick-search box to perform the search.

If tickets that match your search criteria are found, a new listing of these tickets will be presented, as shown below.



The new column added to the ticket listing (headed by the binoculars icon) indicates the **relevancy** of the ticket compared with your search terms. The higher the number, the more relevant (or a **closer match** to your search terms) the ticket is.

When opening a ticket from the search results, the **searched terms** will be highlighted. For example, a quick search was performed for the term "consectetuer", all occurrences of the word will be highlighted.



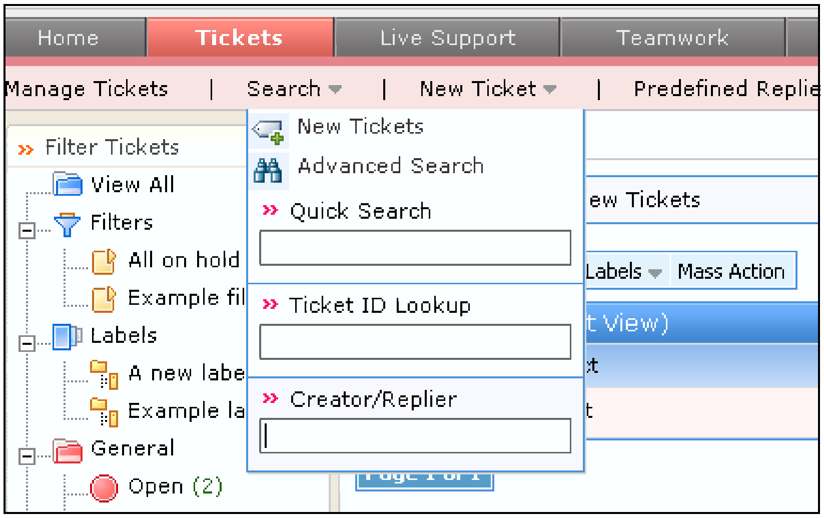
Search menu

A **search menu** is available from the navigation menu bar, as indicated below.

To access the search menu:

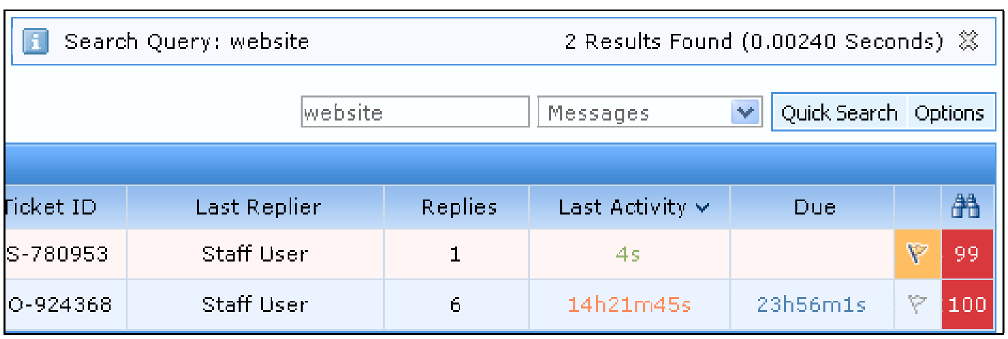
1. Open **Tickets** on the navigation menu bar, as shown below.

2. Open the **Search** sub-menu.



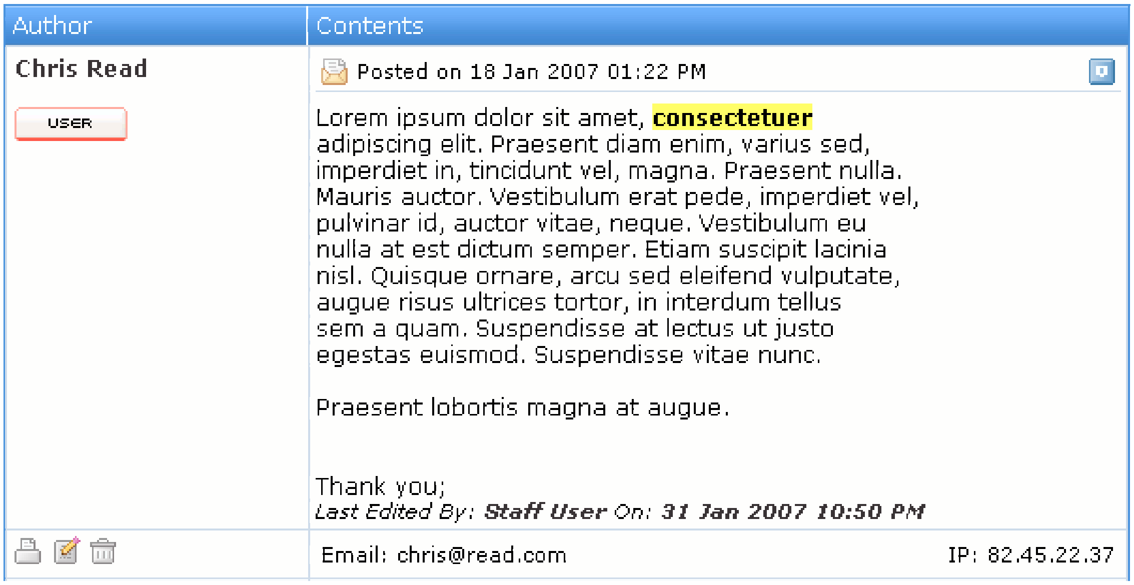
- **New Tickets** – lists all tickets that have been created or replied to since your last visit.
- **Advanced Search** – perform an advanced ticket search. For more information, see advanced search.
- **Quick Search** – quick-search all common ticket fields. Type in the required search terms followed by pressing the return key to perform a search.
- **Ticket ID Lookup** – when the ID of a ticket is known, it is possible to directly open up the ticket. Type in the ticket ID followed by pressing the return key to perform the lookup.
- **Creator/Replier** – lists all tickets created by or replied to the address of name(s) entered here. Type in your search terms followed by pressing the return key to perform the search.

If tickets that match your search criteria are found, a new listing of these tickets will be presented, as shown below.



The new column added to the ticket listing (headed by the binoculars icon) indicates the **relevancy rating** of the ticket compared with your search terms. The higher the number, the more relevant (or a **closer match** to your search terms) the ticket is.

When opening a ticket from the search results, the **searched terms** will be highlighted. For example, a quick search was performed for the term "consectetuer", all occurrences of the word will be highlighted.

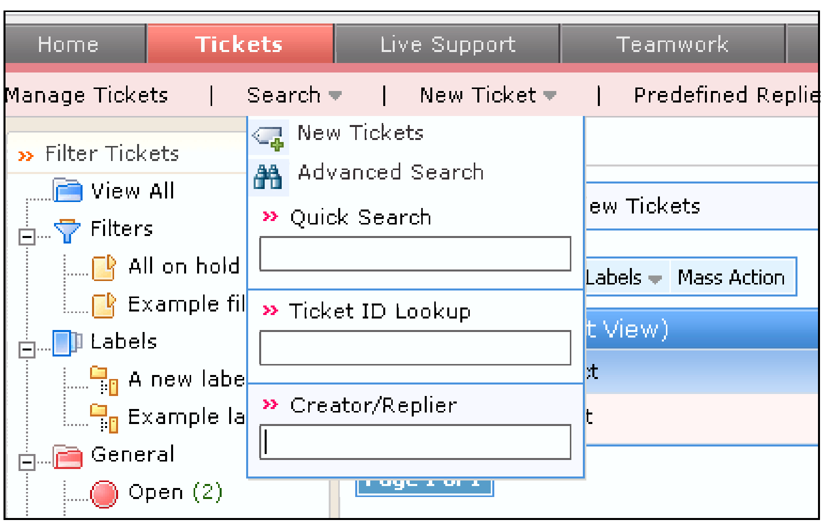


Advanced search

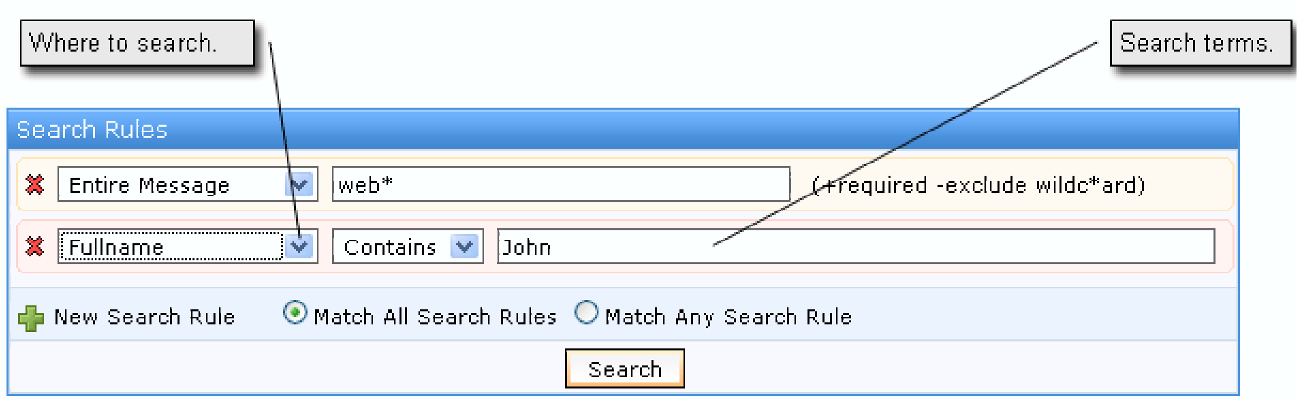
Advanced search is used to generate more finite search results, enabling you to further narrow your search results to speed up finding a ticket.

To open the advanced search form:

1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **Search** sub-menu.
3. Click on **Advanced Search**.



More than one search criteria can be added to the advanced search by clicking on the **New Search Rule** button, as shown above.

- **+required** – by adding a plus " + " sign to the beginning of a word (such as +hello), you indicate that the word hello **must** be included in the search field in order to match and be listed in the search results.

- **-exclude** – by adding a minus " – " sign to the beginning of a word (such as –hello), you indicate that the word hello **must not** be included in the search field in order to match and be listed in the search results.

- **wildc*ard** – searching for the term **web*** in the **Entire Message** field (an example as shown above) will match tickets that have the word web followed by anything else.

  - The following terms **would** be matched by the **web*** search term:

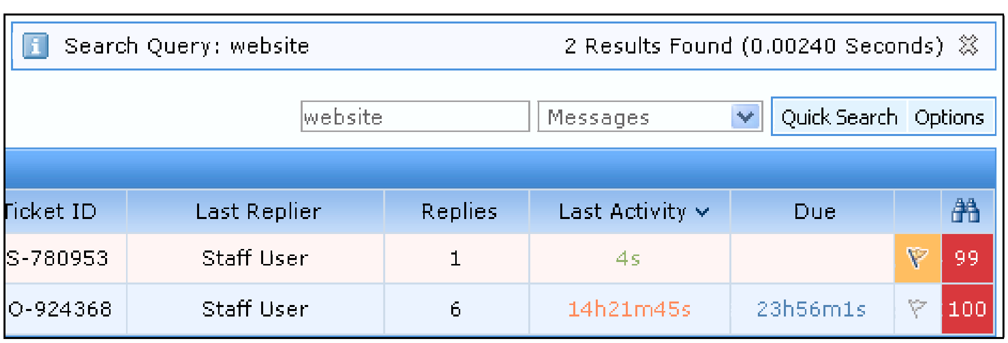
    - website
    - webwonder
    - webweb

  - The following terms **would not** be matched by the **web*** search term:

    - worldwideweb
    - hellowebhello

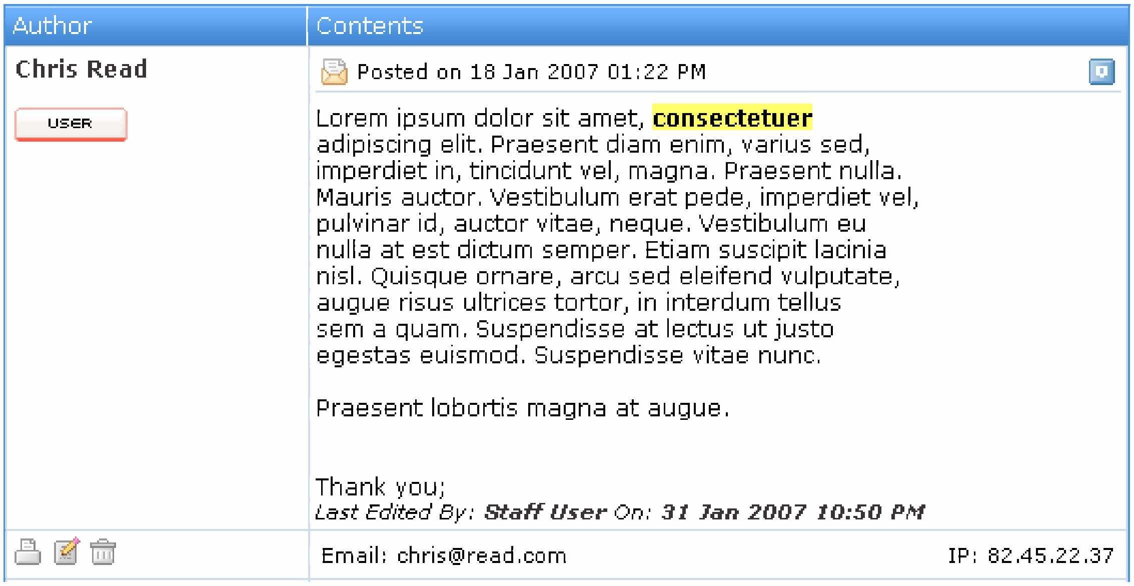
Click on the **Search** button to perform the advanced search.

If tickets that match your search criteria are found, a new listing of these tickets will be presented, as shown below.



The new column added to the ticket listing (headed by the binoculars icon) indicates the **relevancy rating** of the ticket compared with your search terms. The higher the number, the more relevant (or a **closer match** to your search terms) the ticket is.

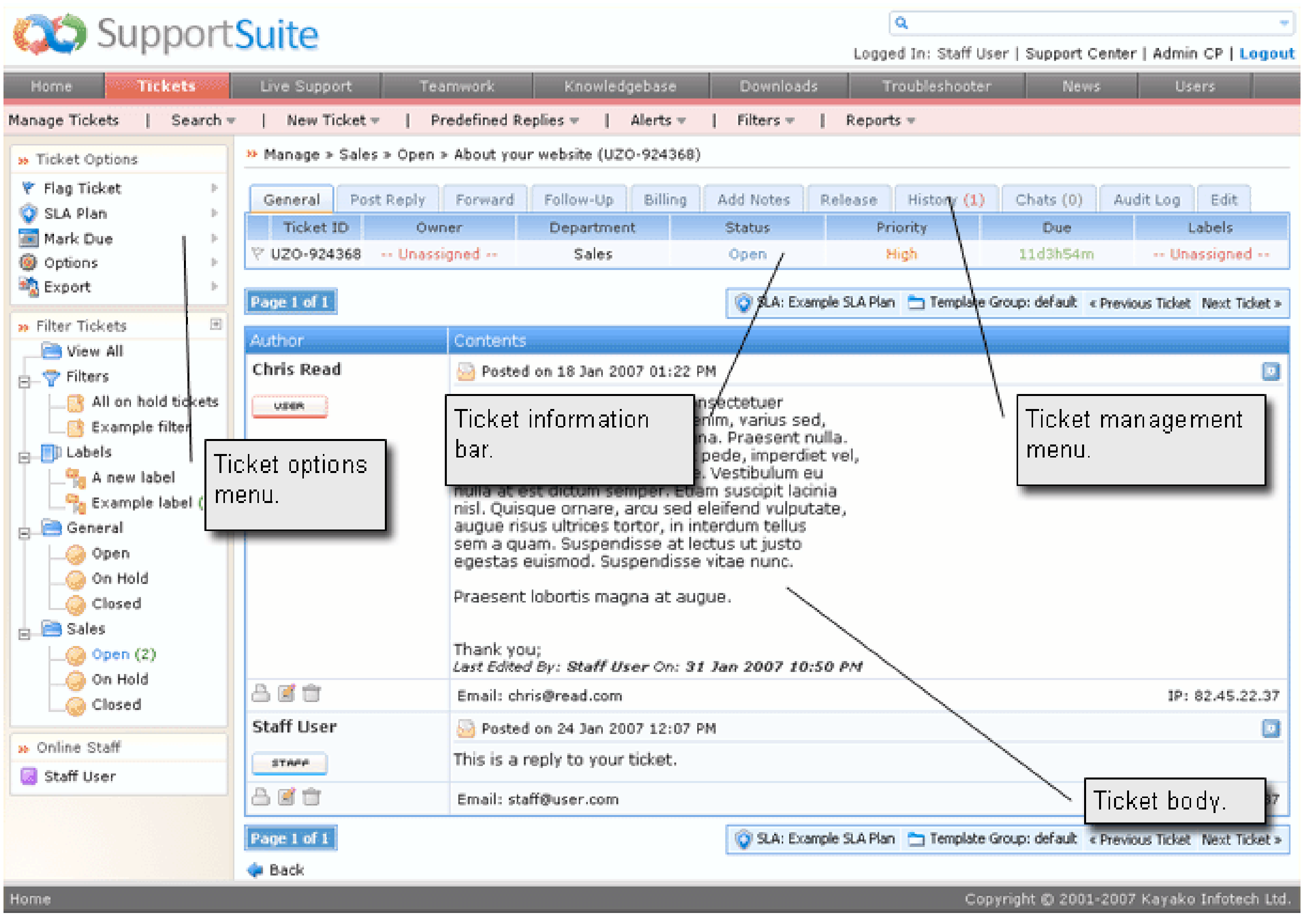
When opening a ticket from the search results, the **searched terms** will be highlighted. For example, a quick search was performed for the term "consectetuer", all occurrences of the word will be highlighted.



Ticket handling

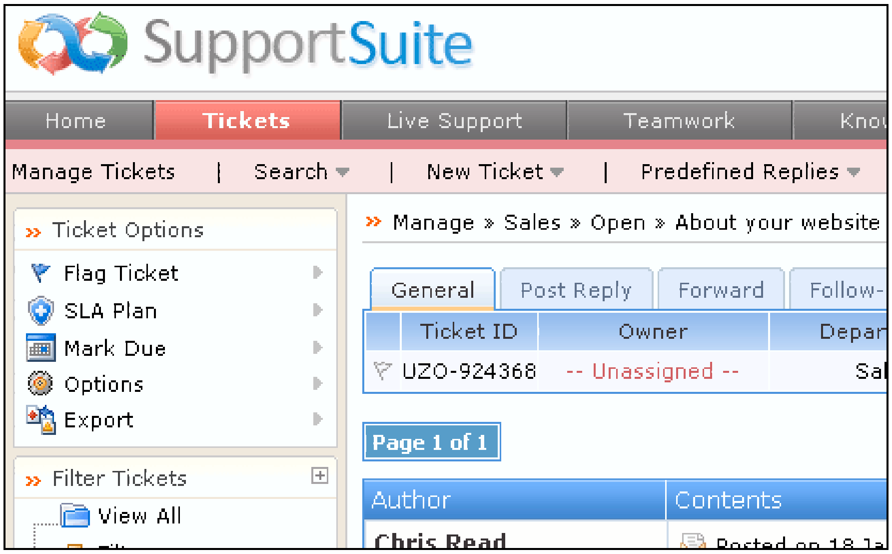
Viewing and managing a ticket

From within a ticket list, click on a ticket's subject to access the **ticket view**. You will then be presented with an interface similar to the following, shown below.



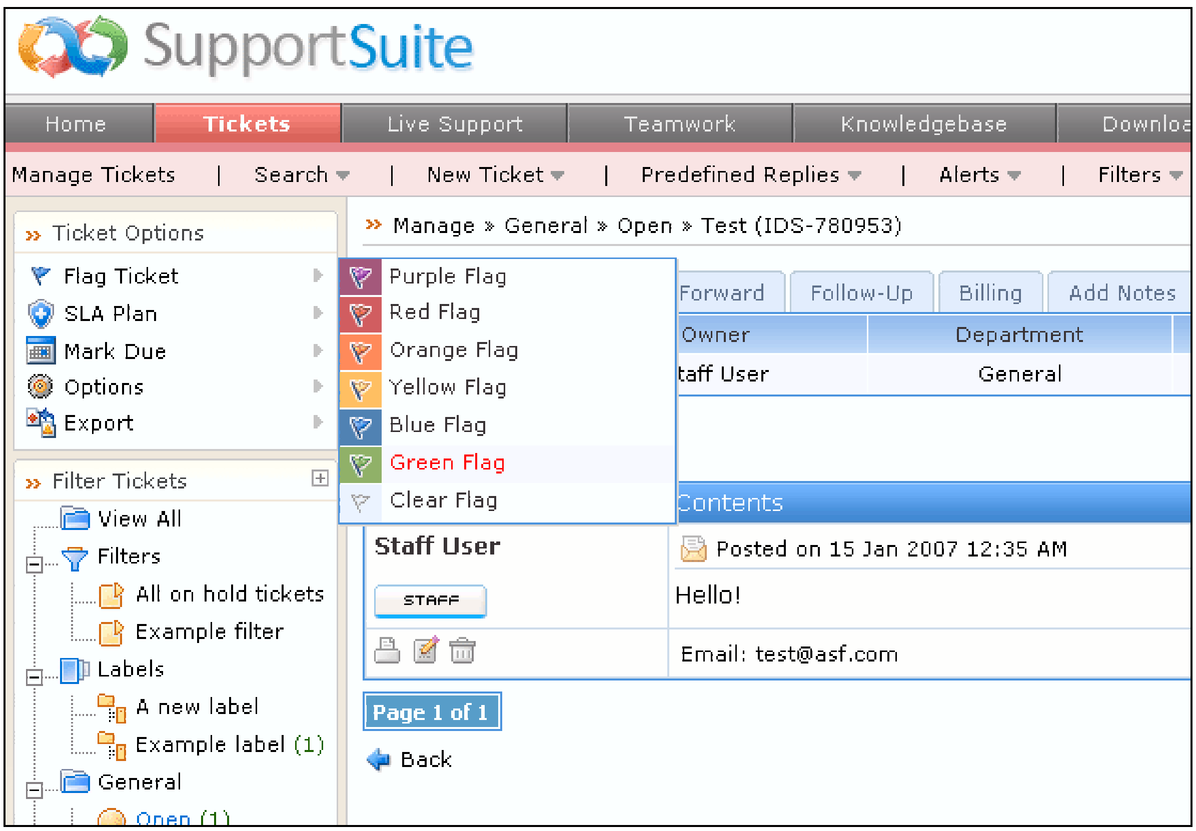
1. Ticket options menu.
2. Ticket body.
3. Ticket management menu and ticket information bar.

Ticket options menu



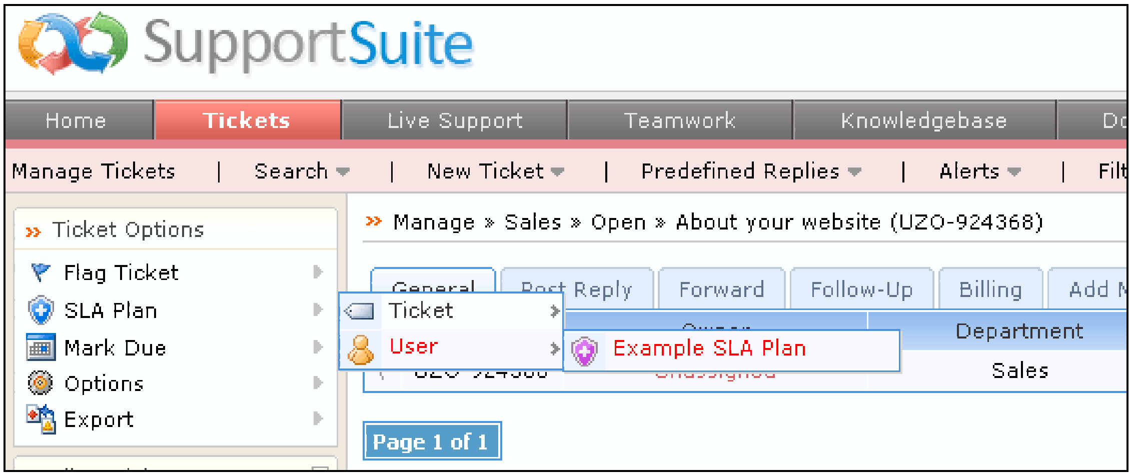
Flag ticket

Clicking on this menu will open a list of available flags that can be used to flag the opened ticket, as shown below. For more information on ticket flags, see ticket fags.



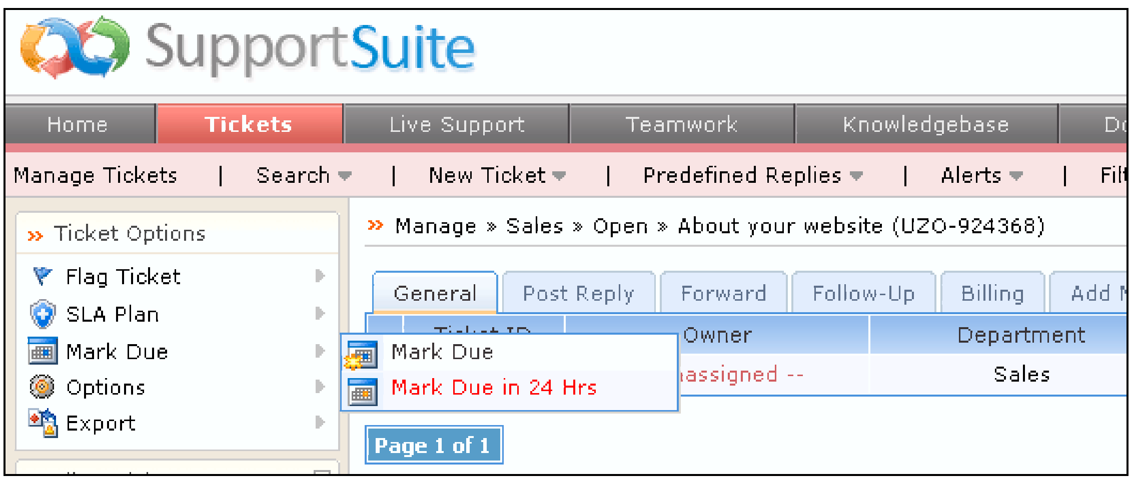
SLA Plan

The SLA Plan menu allows you to assign an SLA plan to the user who created the ticket or to the ticket itself, as shown below. For more information, see SLA in the administrator control panel.

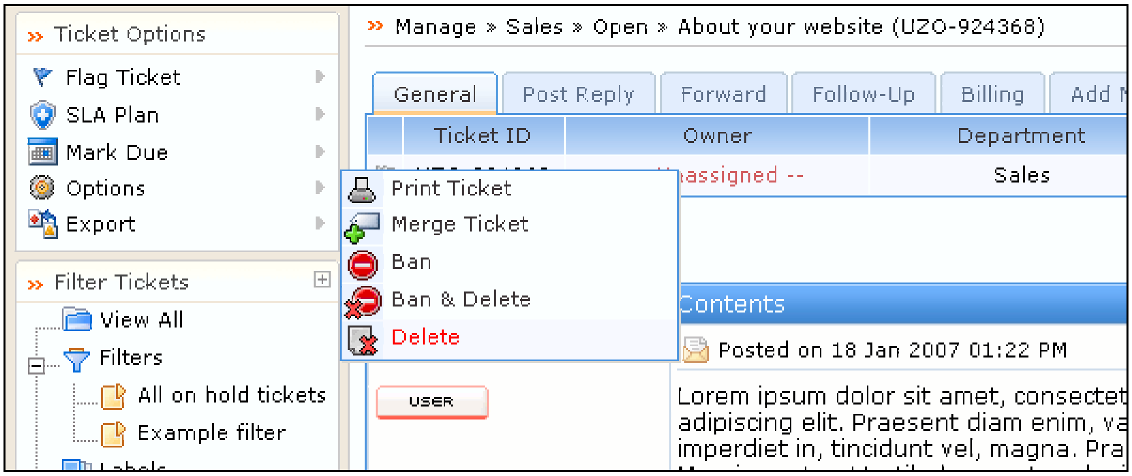


Mark due

Clicking on this menu will allow you to quickly set the **due time** ("now" or "In 24 Hours") for which a response or resolution to the ticket is due, as shown below. For more information on due times and details on how to set a specific due time, see Ticket Due Times.

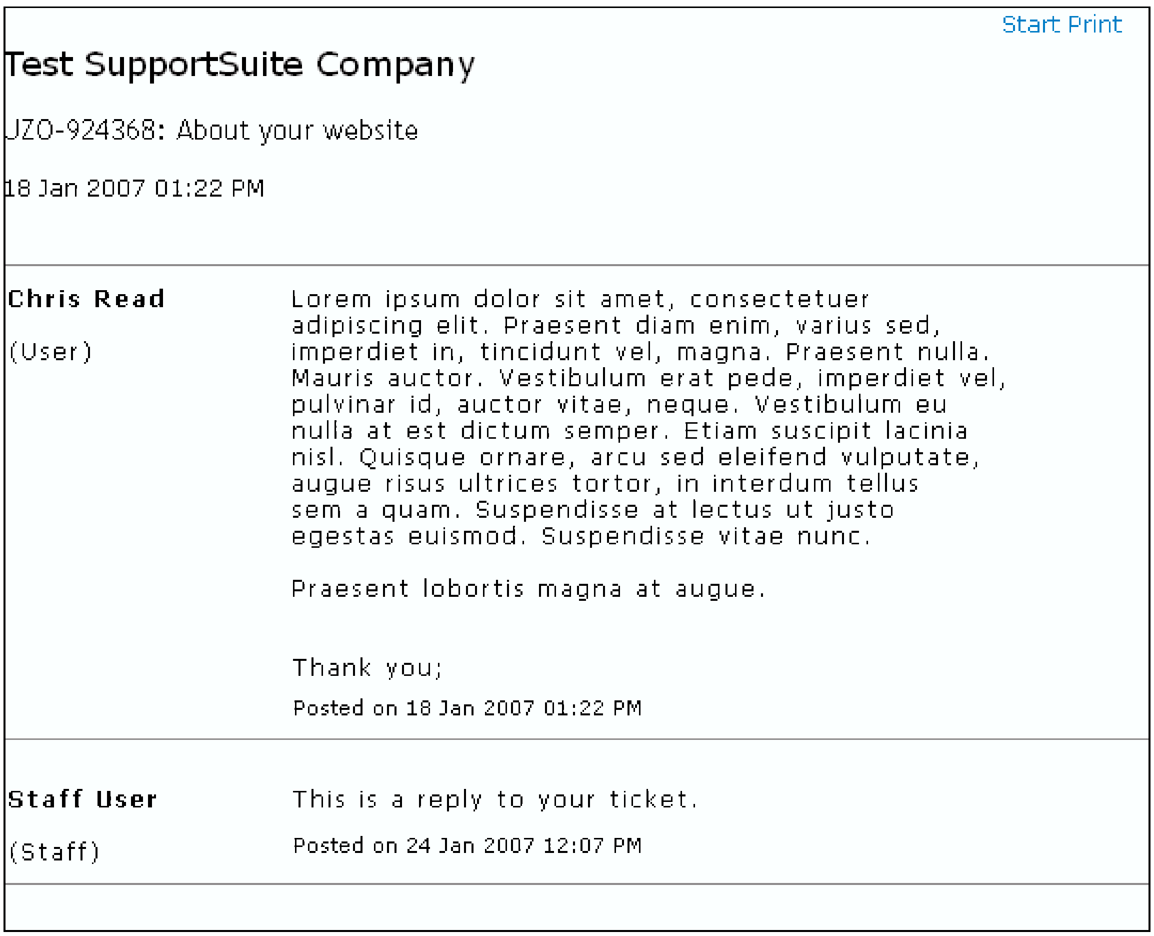


Options



Clicking on this menu choice will introduce a series of ticket options.

Print Ticket – clicking this menu choice will open a new browser window featuring the ticket, its details and all replies in a printer-friendly format, as shown below.



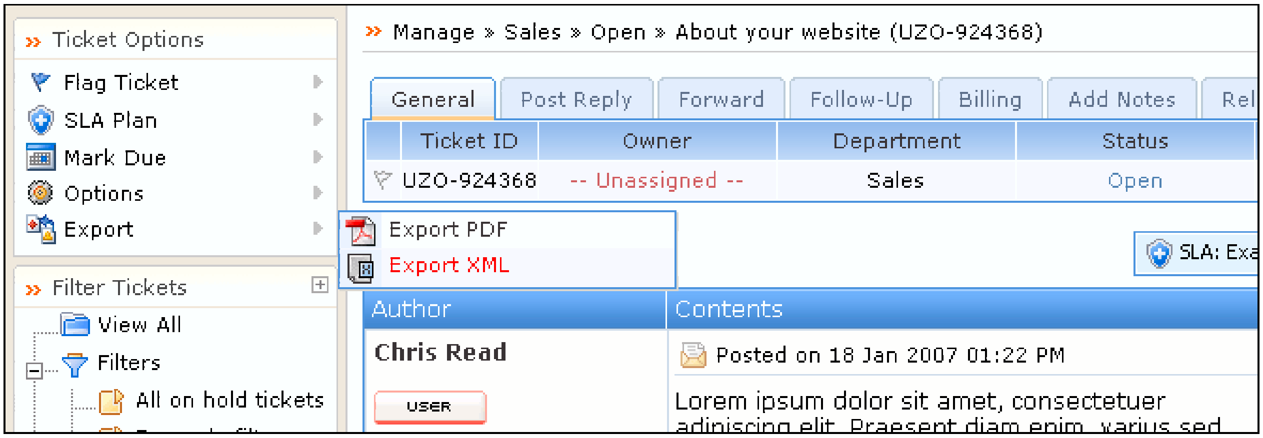
Merge Ticket – opens up the ticket's edit pane, in which you can enter the ID of another ticket to which the current ticket will be merged.

Ban – adds the ticket creator's e-mail address to the ban list (managed within the administrator control panel). No more e-mails or tickets raised form this e-mail address will be received by the system.

Ban and Delete – performs the same function as the Ban option as well as deleting the entire ticket. Deleting a ticket is irreversible.

Delete – deletes the ticket from the database. This option is irreversible.

Export



Export PDF – generates a PDF version of the ticket details and replies, as shown below.

UZO-924368

About your website

Chris Read

18 Jan 2007 01:22 PM

Chris Read - 18 Jan 2007 01:22 PM

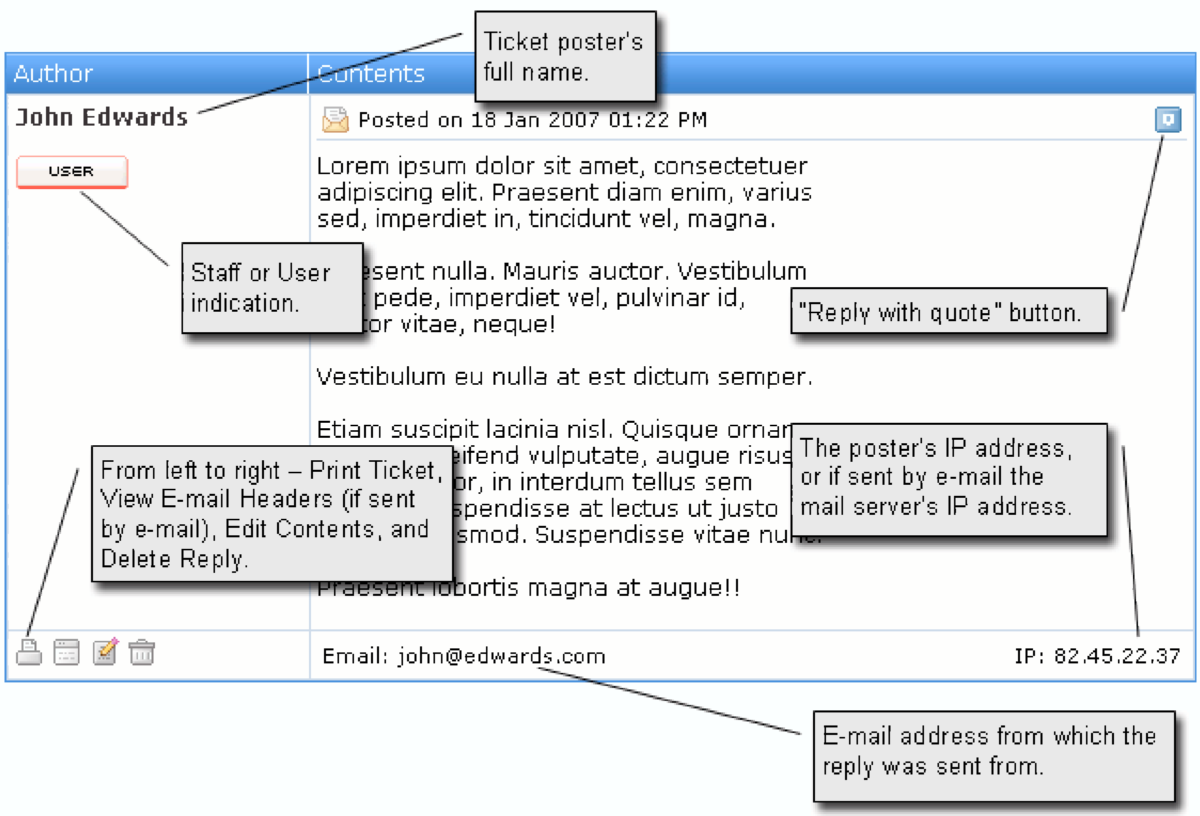
Lorem ipsum dolor sit amet, consectetuer
adipiscing elit. Praesent diam enim, varius sed,
imperdiet in, tincidunt vel, magna. Praesent nulla.
Mauris auctor. Vestibulum erat pede, imperdiet vel,
pulvinar id, auctor vitae, neque. Vestibulum eu
nulla at est dictum semper. Etiam suscipit lacinia
nisl. Quisque ornare, arcu sed eleifend vulputate,
augue risus ultrices tortor, in interdum tellus

Export XML – exports an XML data file of the ticket details and replies, as shown below.

```
  <?xml version="1.0" encoding="UTF-8" ?>
  <!--  XML Generated On: 01 Feb 2007 04:55 PM   -->
- <ticket>
  - <ticketid>
      <![CDATA[ 2  ]]>
    </ticketid>
  - <ticketmaskid>
      <![CDATA[ UZO-924368  ]]>
    </ticketmaskid>
  - <departmentid>
      <![CDATA[ 3  ]]>
    </departmentid>
  - <department>
      <![CDATA[ Sales  ]]>
    </department>
  - <ticketstatusid>
      <![CDATA[ 1  ]]>
    </ticketstatusid>
  - <ticketstatus>
      <![CDATA[ Open  ]]>
    </ticketstatus>
  - <priorityid>
      <![CDATA[ 3  ]]>
    </priorityid>
  - <priority>
```


Ticket body

The figure below details a typical **ticket reply** post body.

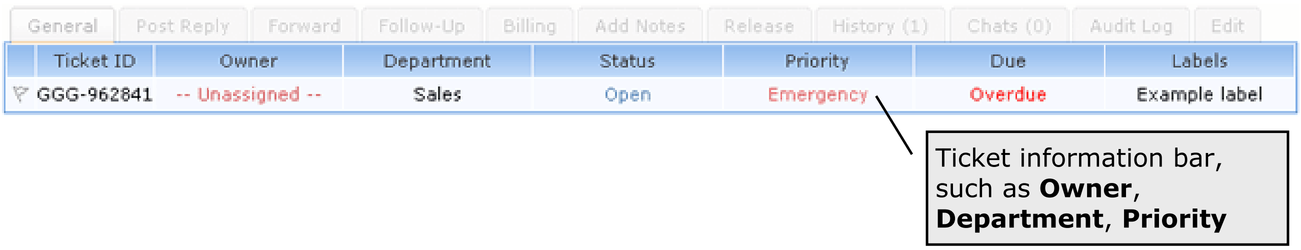


- **Reply-with-quote button** – clicking this button will take you directly to the ticket reply interface with the contents of the ticket reply quoted.
- **IP address –** the IP address of the user who created the reply. If the ticket reply was received via **e-mail**, the IP address here will represent the address of the sending mail server.
- **Ticket reply functions**
  - **Print reply** - opens and prints a printer-friendly view of the ticket reply.
  - **E-mail headers** - if the reply was received via e-mail, this icon will be available and will open up a view of the raw e-mail headers stored for the ticket reply.
  - **Edit reply** - edit the contents of the ticket reply.
  - **Delete reply** - delete the ticket reply.
- **User status**
  - STAFF - user is a **staff user**.
  - USER - user is a regular **client user**.
  - THIRD PARTY - user is a **third party**.
  - RECIPIENT - user is a **recipient**.

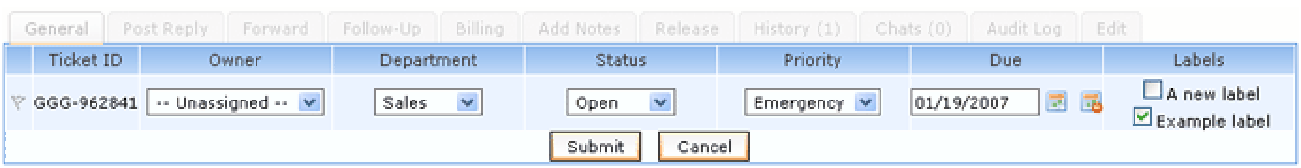
Ticket information bar

Note – the tabs of the ticket management menu have been grayed out for the purposes of this

The ticket management menu consists of a series of clickable tabs that allow you to perform all ticket related functions for the ticket currently in view.



Clicking on the **ticket information bar** (as indicated above) will transform the information bar into an editable version, as shown below.



The editable interface allows for the editing of the following ticket properties:

Owner – change the owner (staff user) of a ticket (also known as ticket assignment).

Department – change the department the ticket resides in.

Status – change the status the ticket is set to. For more information on statuses, see Ticket Status.

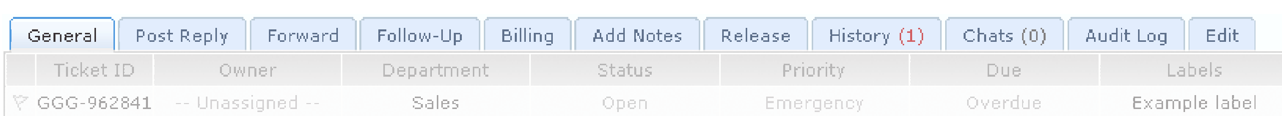
Priority – change the priority of the ticket. For more information on priorities, see Ticket Priority.

Due – the date and time at which the ticket is due by. For more information on ticket due times, see Ticket Due Times.

Labels – attach or remove labels to the ticket. For more information on labels, see Ticket Labels.

Ticket management menu

Note – the tabs of the ticket information bar have been grayed out for the purposes of this

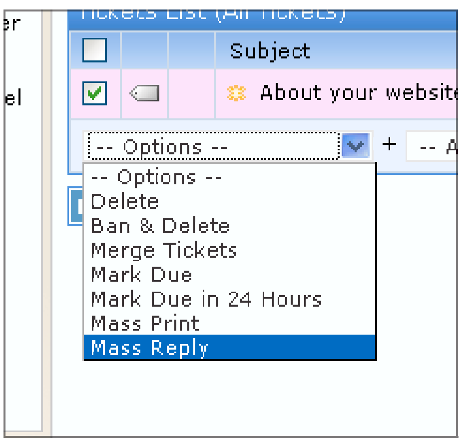


- **General** – the general tab calls up the ticket information bar.

- **Post Reply** – the post reply tab will introduce the reply interface.
- **Forward** – the forward tab calls up forwarding related functions.
- **Follow-Up** – the follow up tab allows you to add a follow-up task to the ticket.
- **Billing** – the billing tab calls up the billing information bar, allowing a staff user to add billing and time worked information to a ticket..
- **Add Notes** – the add notes tab enables the attaching of notes to the ticket.
- **Release** – the release tab allows a staff user to release a ticket to another (or no) staff user.
- **History** – the history tab calls up the ticket creator's ticket history.
- **Chats** – the chats tab calls up the ticket creator's chat history (not applicable to eSupport).
- **Audit Log** – the audit log tab calls up a detailed audit history of the ticket, such as status changes, replies, priority changes and department transfers.
- **Edit** – the edit tab calls up editable ticket fields such as recipients and ticket properties.

Mass-replying to tickets

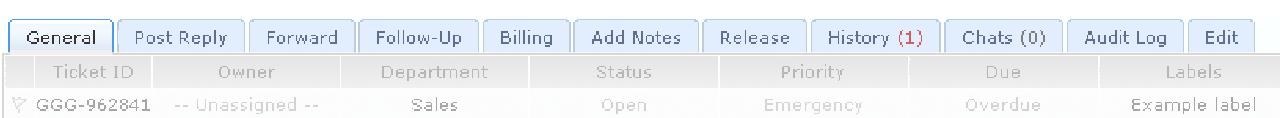
This can be done visa the mass-management interface within a ticket listing, as shown below.



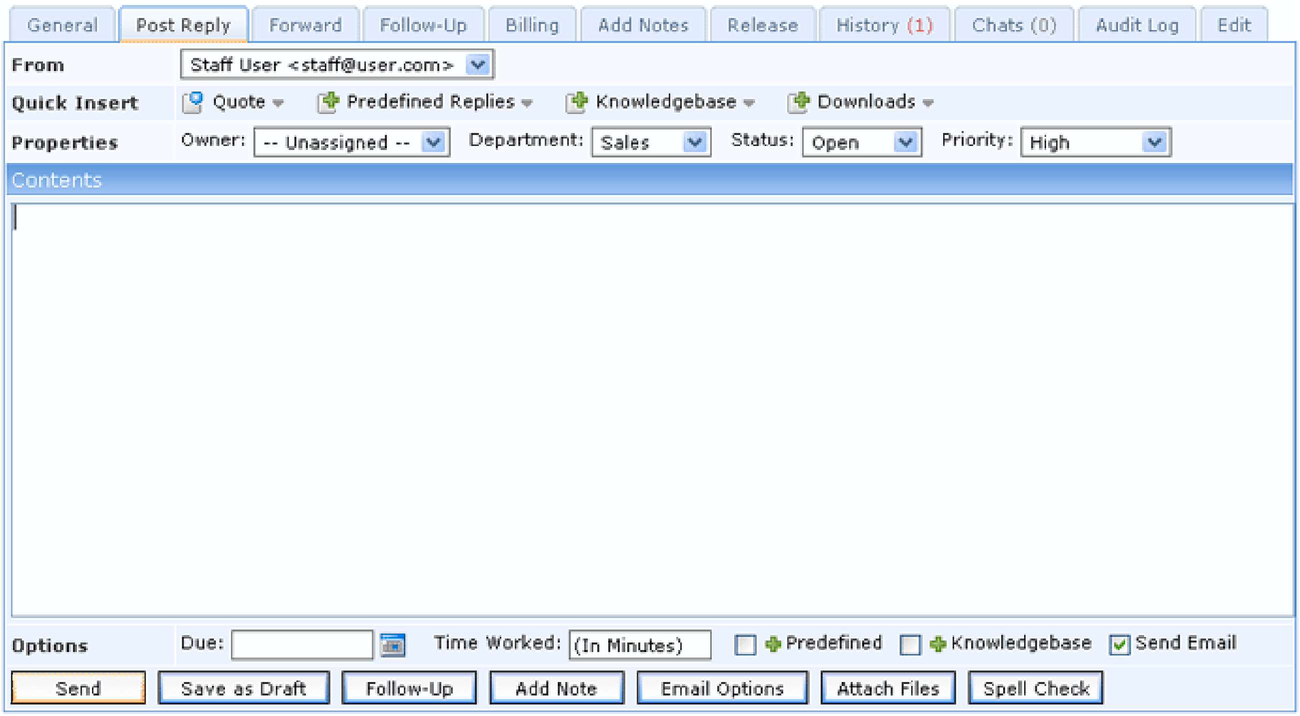
For more information on the ticket reply interface, see replying to a single ticket.

Replying to a ticket

When viewing a ticket (as detailed in viewing a ticket), click on the **Post Reply** tab on the **ticket management menu** as shown below.



This will present you with the ticket reply interface, as shown below.



From

Quick Insert

- Quote
- Predefined Replies
- Knowledgebase
- Downloads

Properties

- Owner
- Department
- Status
- Priority

Options

- Due
- Time Worked
- Add to Predefined
- Add to Knowledgebase
- Send Email

Buttons

- Send – sends the reply.
- Save as Draft
- Follow-Up
- Add Note
- Email Options
- Attach Files
- Spell Check

From

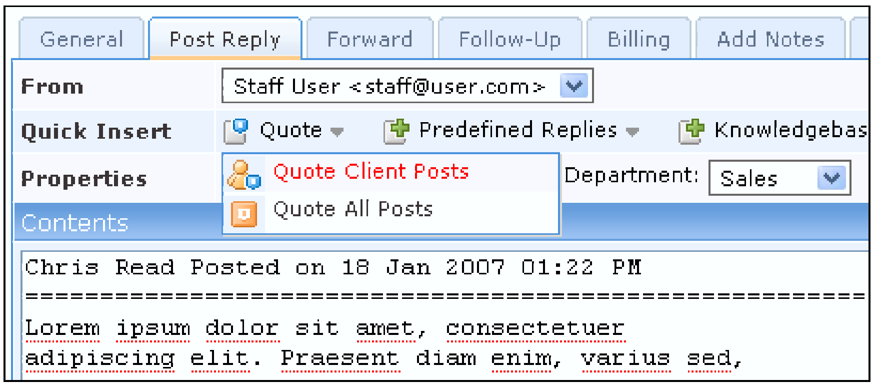
If there are multiple **e-mail queues** configured (in the **administrator control panel**) for SupportSuite, a different "From" address and name can be set here.

Quick-insert

Quote

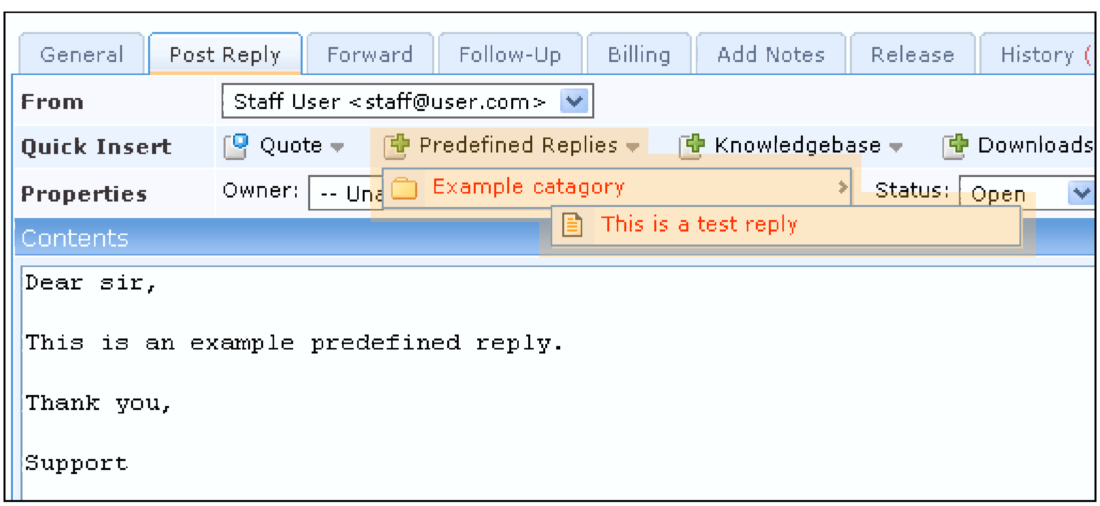
Past correspondence from within the ticket can be quoted using this menu.

Quote Client Posts – pastes all of the client's correspondence from within the ticket into the reply area.
Quote All Posts – pastes an entire correspondence copy of all replies within the ticket.



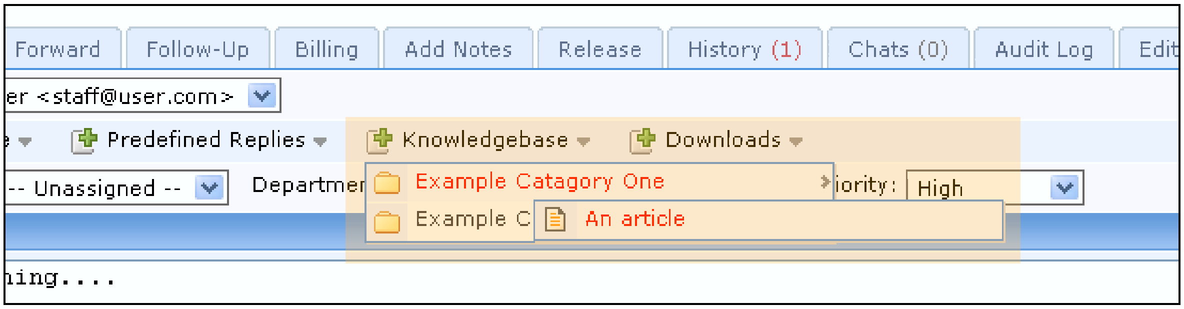
Predefined Replies

Introduces a menu of predefined reply categories, allowing you to navigate through the replies and paste a predefined reply into the reply area. For more information on predefined replies, see Predefined Replies.



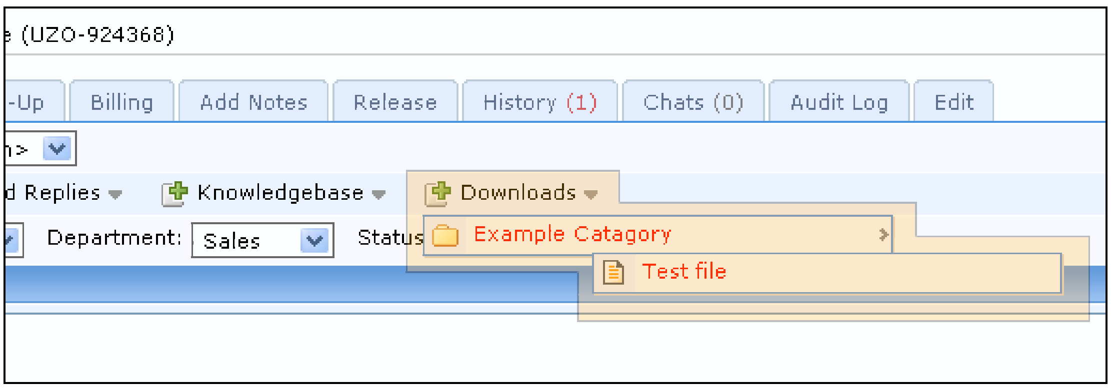
Knowledgebase

Working similarly to the predefined replies menu, opening this menu will introduce a list of knowledgebase categories and articles for pasting into the reply area.

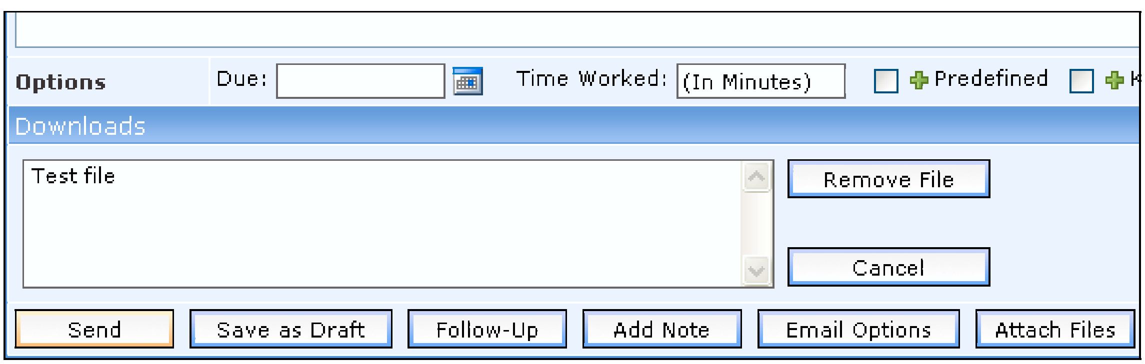


Downloads

Opening this menu will introduce a list of downloads categories and their respective files, allowing attachment of the files to the ticket reply, as shown below.



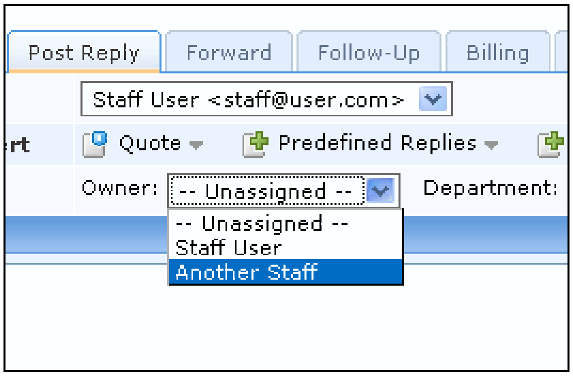
Attached downloads will appear underneath the reply area, as shown below.



Properties

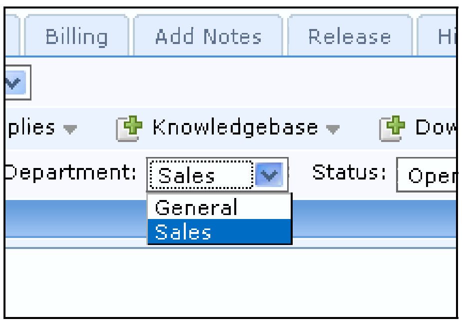
Owner

The owner of the ticket can be set here (ticket assignment). For more information on ticket assignments, see Ticket Assignments.



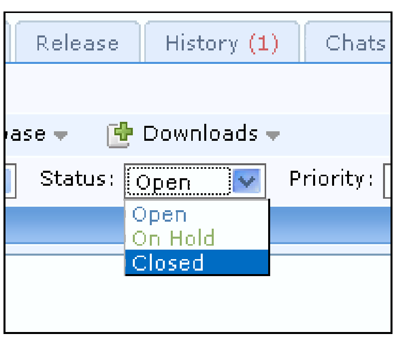
Department

The department in which the ticket resides can be changed using this menu.



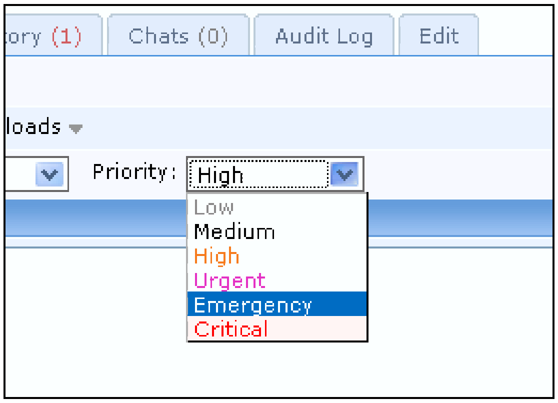
Status

The status of the ticket can be changed using this menu. For more information on ticket statuses, see Ticket Status.



Priority

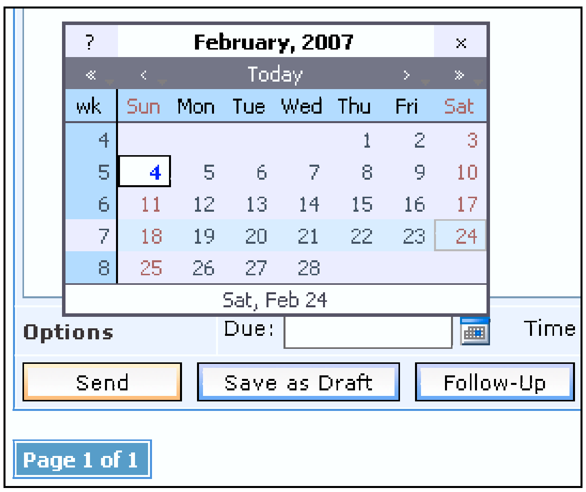
The priority of the ticket can be changed using this menu. For more information on ticket priorities, see Ticket Priority.



Options

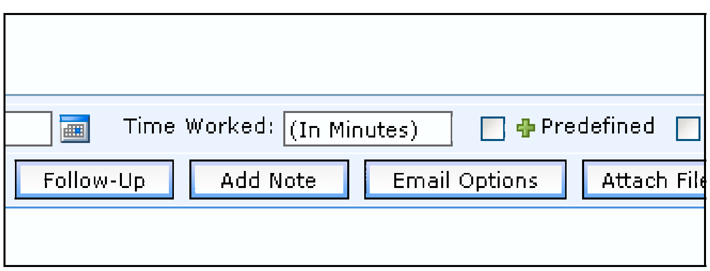
Due

As part of the ticket's reply, a due date can be set for the ticket. Clicking on the calendar icon (as shown below) will bring up a calendar. Clicking on a day will set the ticket due for that day. For more information on ticket due times, see Ticket Due Times.



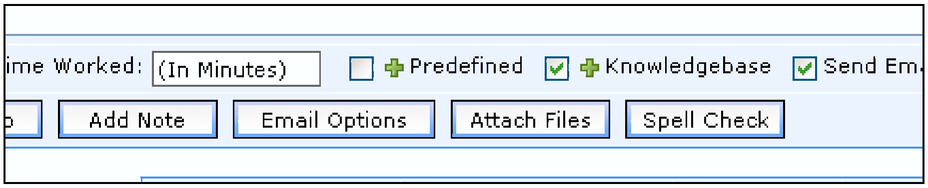
Time worked

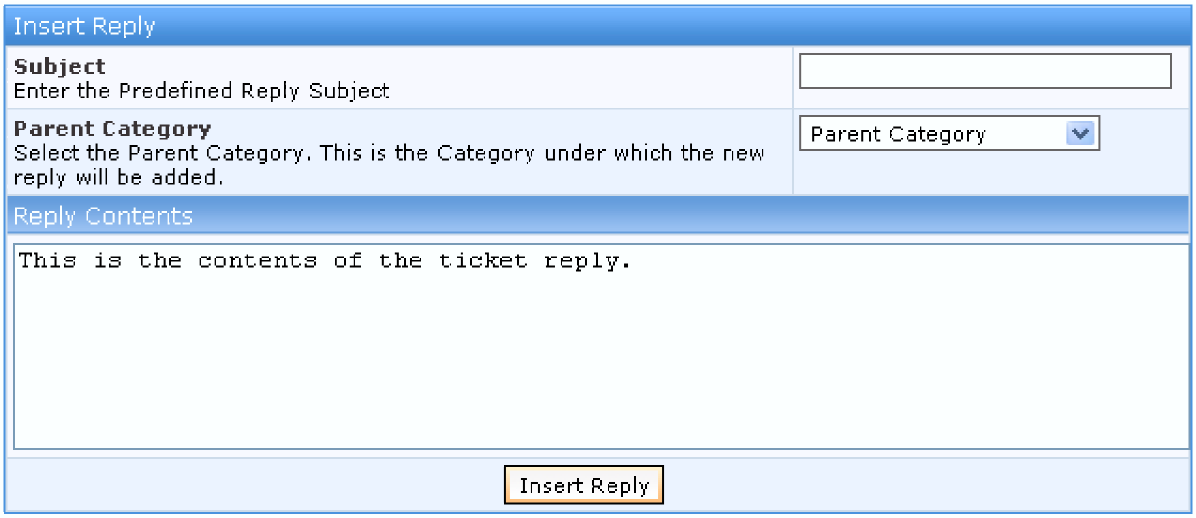
As part of the time tracking information features of SupportSuite, the time worked on the ticket reply can be entered here – adding to the total time worked on the ticket. For more information on time tracking and billing information, see Billing Information.



Add to predefined

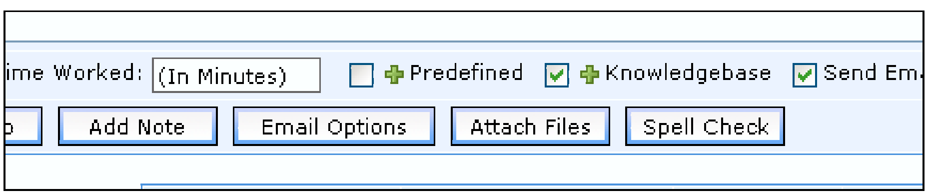
Checking this box will allow for the creation of a new **predefined reply** based on the contents of the ticket reply entered. After sending the ticket reply, you will be presented with a predefined reply entry form, as shown below. For more information on predefined replies, see Predefined Replies.

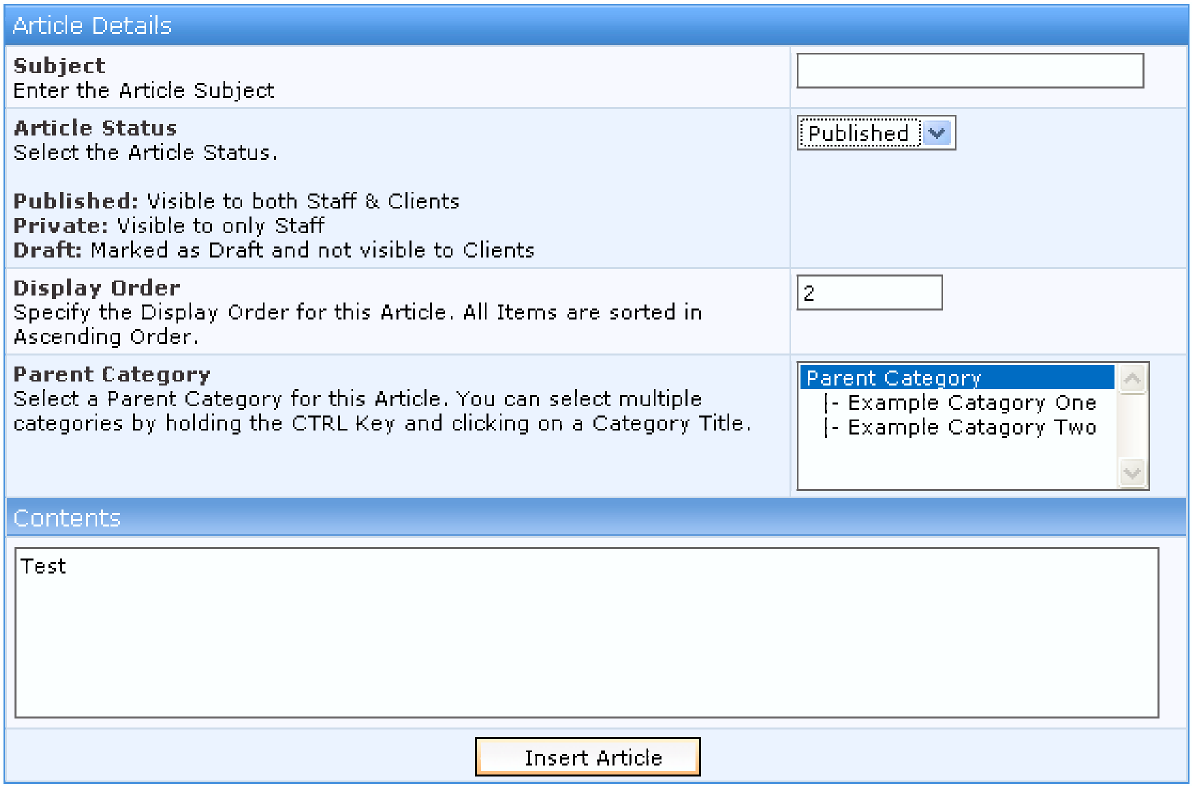




Add to knowledgebase

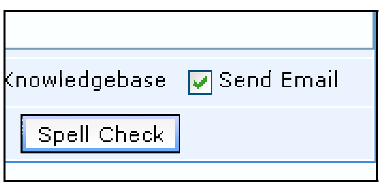
Checking this box will allow for the creation of a new **knowledgebase article** based on the contents of the ticket reply entered. After sending the ticket reply, you will be presented with a knowledgebase article entry form, as shown below.





Send e-mail

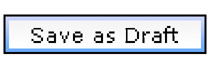
Checking this box will send the ticket reply by e-mail to the client. With this box checked, the ticket reply will still be recorded and available to the client via the **client support interface**, but a copy will not be sent by e-mail.



Buttons

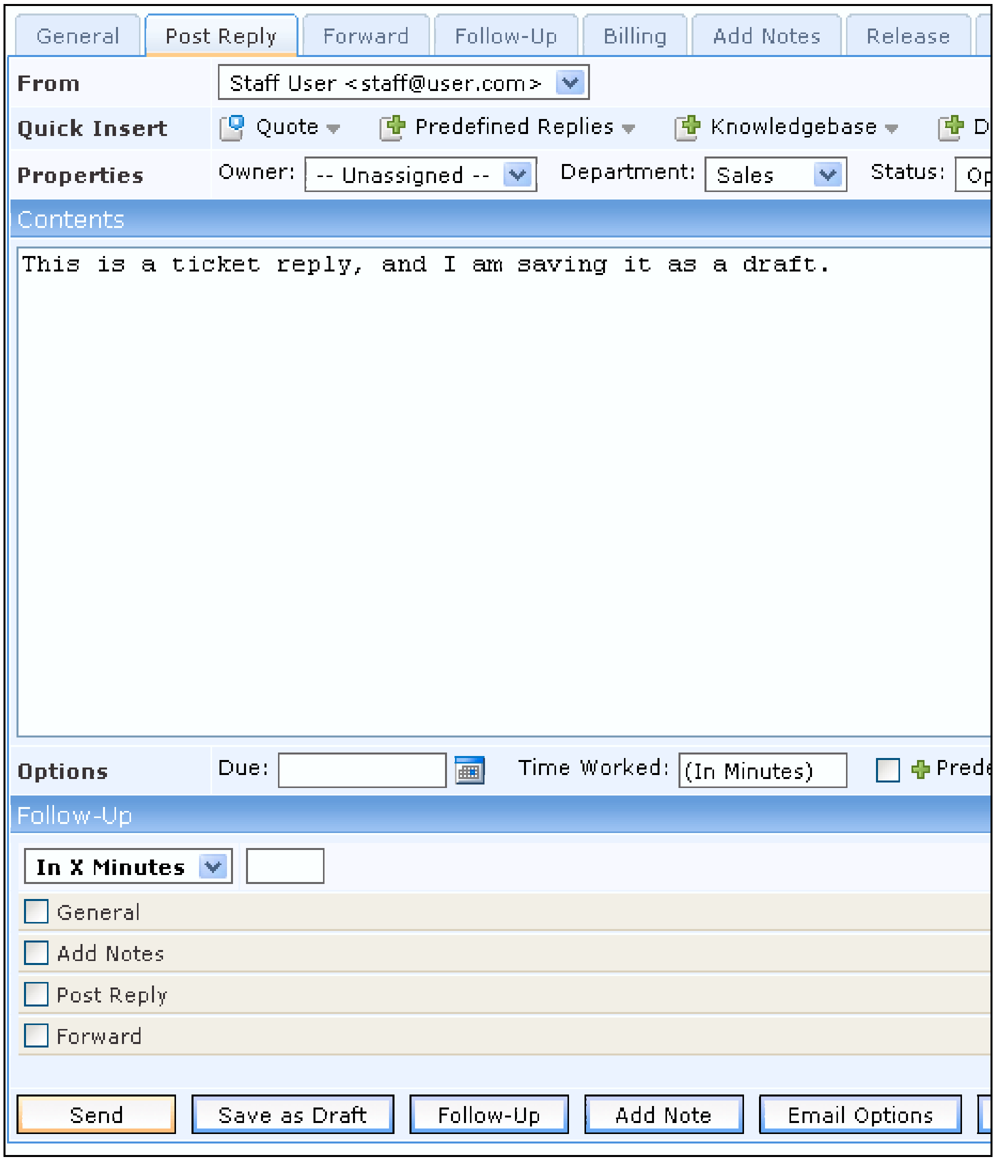
Save as draft

Clicking on this button will save the contents of the ticket reply area. When you next open the reply interface for this ticket, the draft contents will appear in the ticket reply area, available for modification.



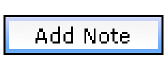
Follow-up

Clicking on this button will open up **ticket follow-up** options that can be set for the ticket when a reply has been sent, as shown below. Clicking on this button again will hide the follow-up options. For more information on ticket follow-up, see Ticket Follow-up.

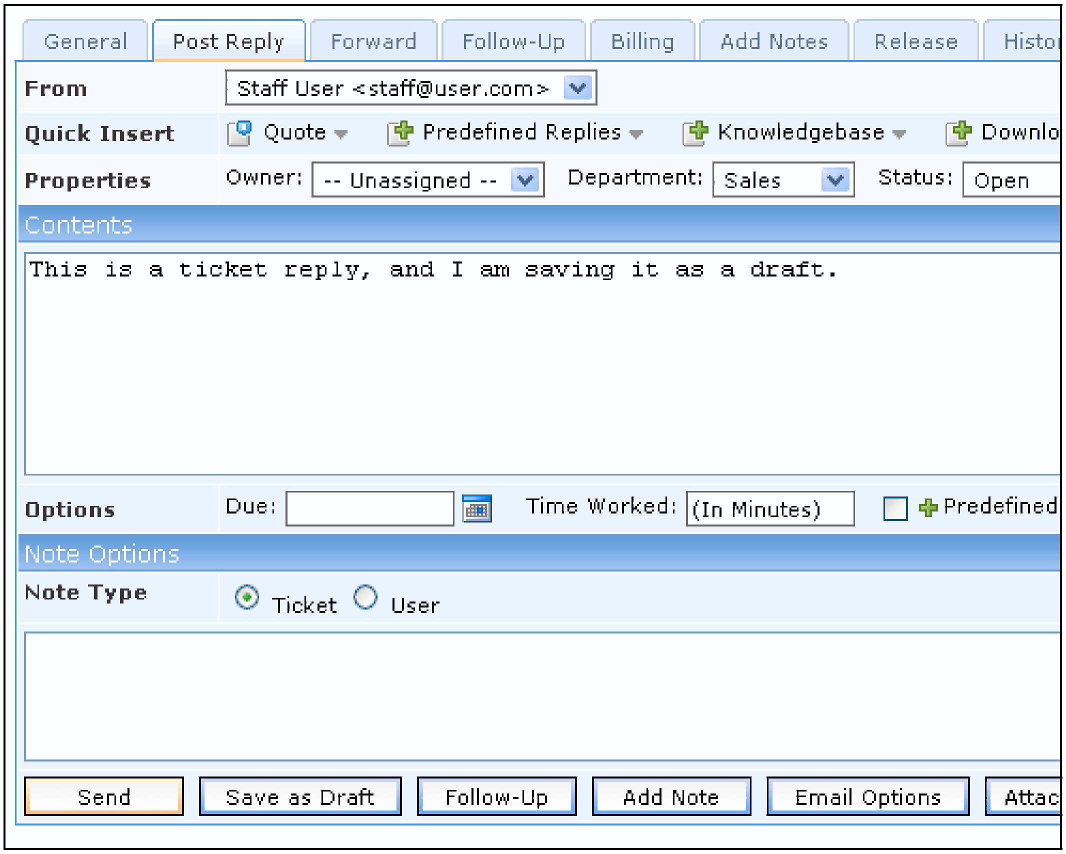


Add note

Clicking on this button will introduce a **ticket note** field (as shown below), allowing the entry of a ticket note that will be attached to the ticket once the reply has been sent. Clicking on this button again will hide the ticket note field.



Selecting **Ticket** will append the note to the ticket. Selecting **User** will append the note to the user account of the ticket creator. For both of these options, the ticket will not be visible to the client.



For more information on ticket notes, see Ticket Notes.

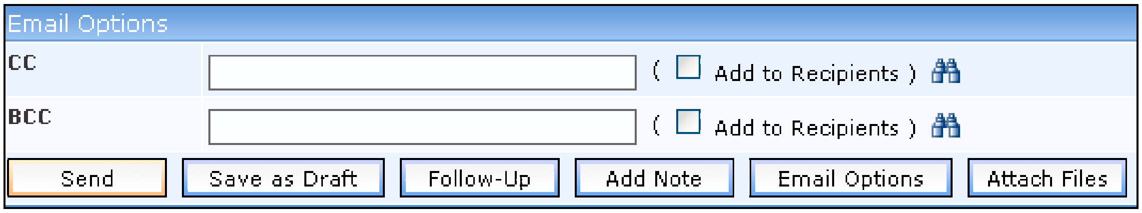
E-mail options

Clicking on the **e-mail options** button will introduce fields allowing for the addition of a **Carbon Copy (CC)** and a **Blind-carbon Copy (BC)** e-mail addresses. When the **Send E-mail** button is checked (see Send E-mail), the ticket reply will also go out to the addresses entered here.

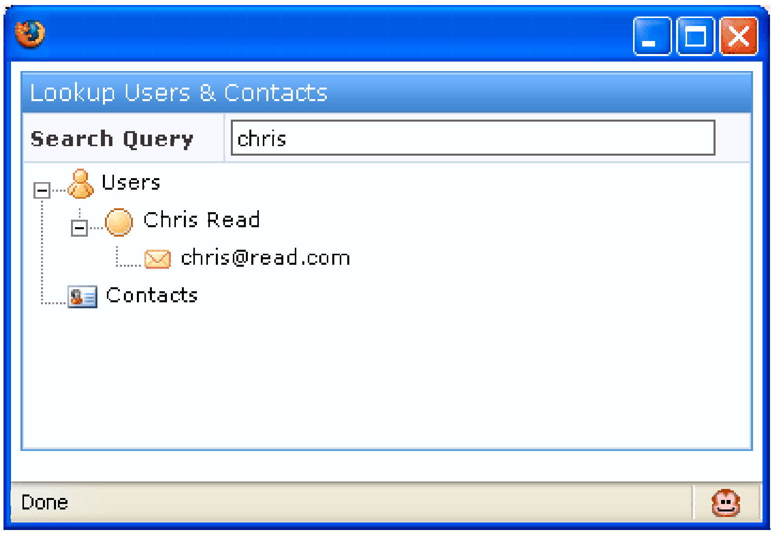
Checking the **Add to Recipients** box will add the address(s) to the recipients list for the ticket, meaning that any reply subsequent to this will be sent out to the addresses.

For more detailed information on CC, BCC and third party recipients see CC, BCC and third party recipients.

Checking this box also means that replies can be made and appended to this ticket from the added addresses.

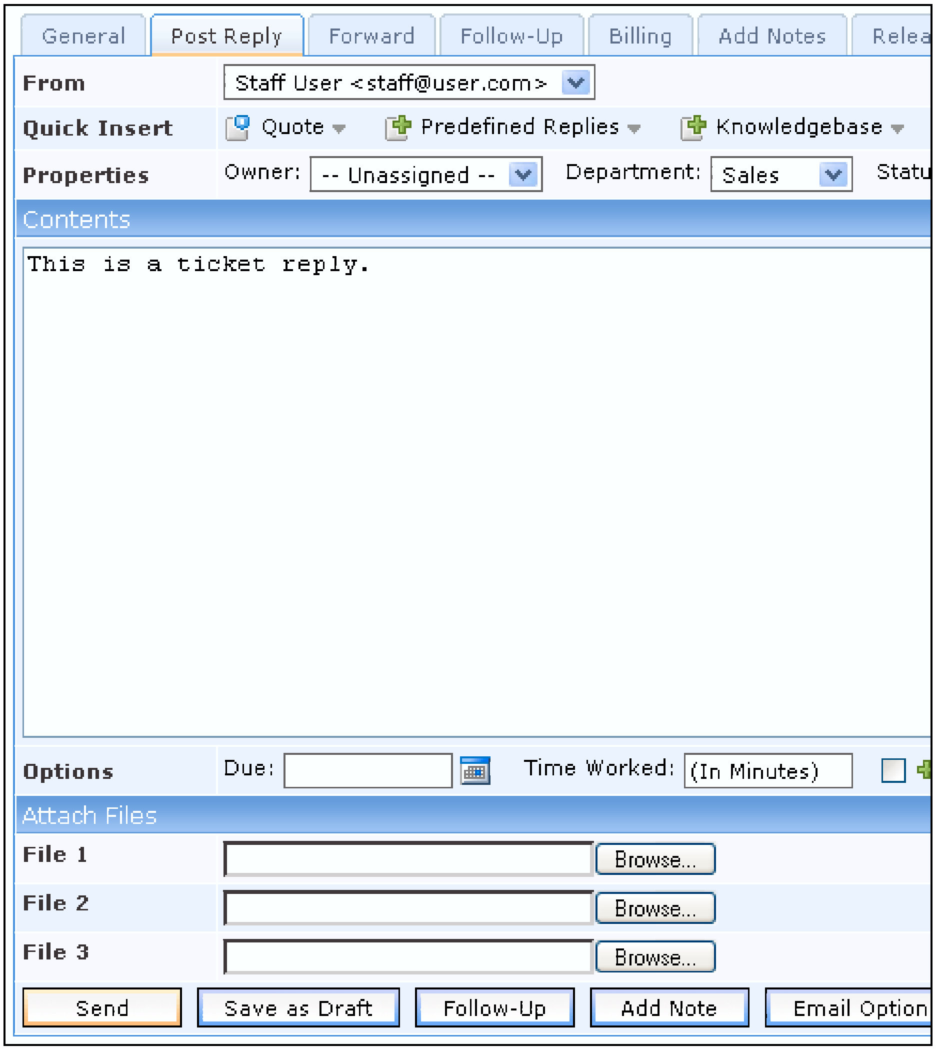


Clicking on the binoculars icon will open an **address search** window, allowing the search of e-mail addresses from user accounts and the contacts list, as shown below. The search is performed **as you type**.

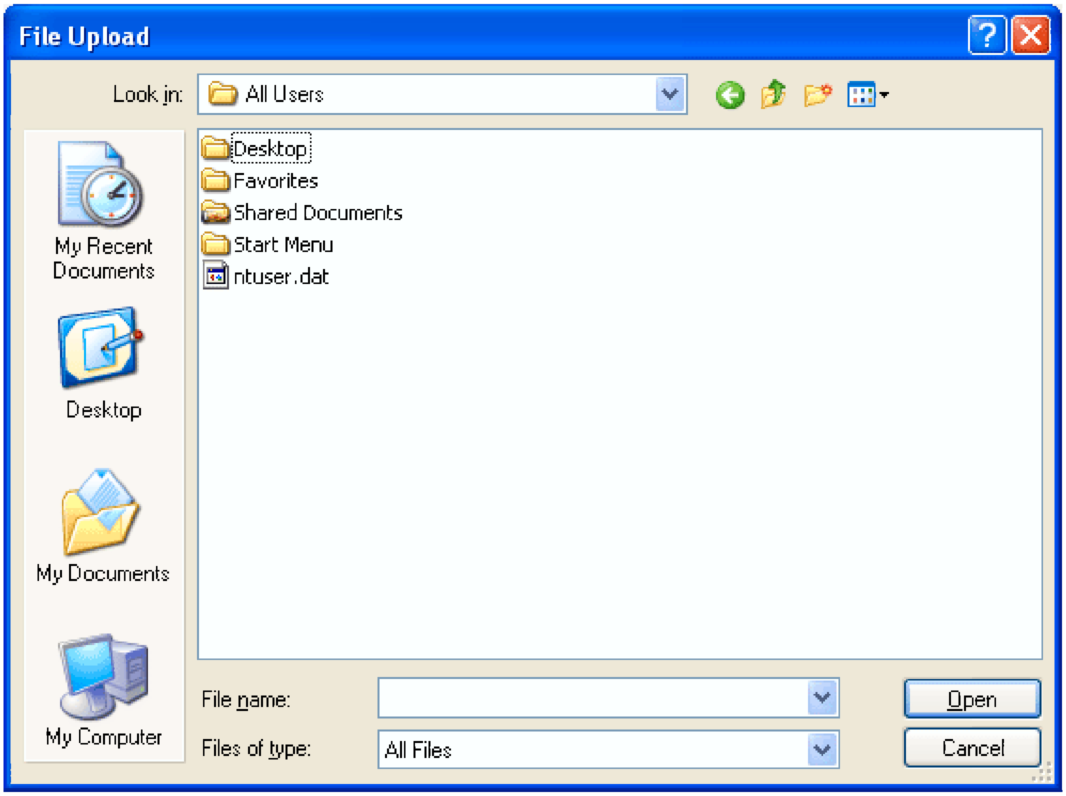


Attach files

Clicking on the **attach files** button will introduce the **file attachments** fields, allowing the upload of files from the staff user's computer. If attachment of files that already exist within the **downloads** area is required, see Downloads on the quick-insert menu.



Clicking on the **browse** button for each corresponding file location field will open a file browser, as shown below. Use this to select the file for upload and attachment.



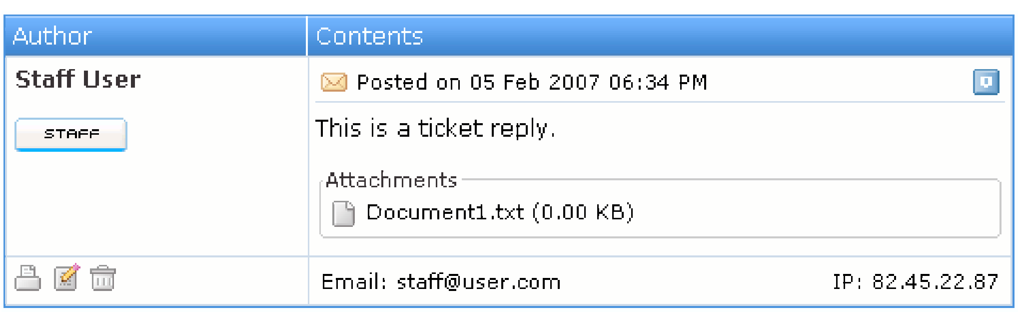
After selecting a file, the absolute path of the file will be entered in the corresponding file field box, as shown below. Up to two more files can be attached in this way.

The maximum number of files that can be attached to a ticket reply is defined in the administrator control panel (see ticket settings in the administrator control panel).

Sending the ticket reply (after clicking on the **Send** button) may take longer than usual depending on the sizes of the files being attached to the ticket reply.

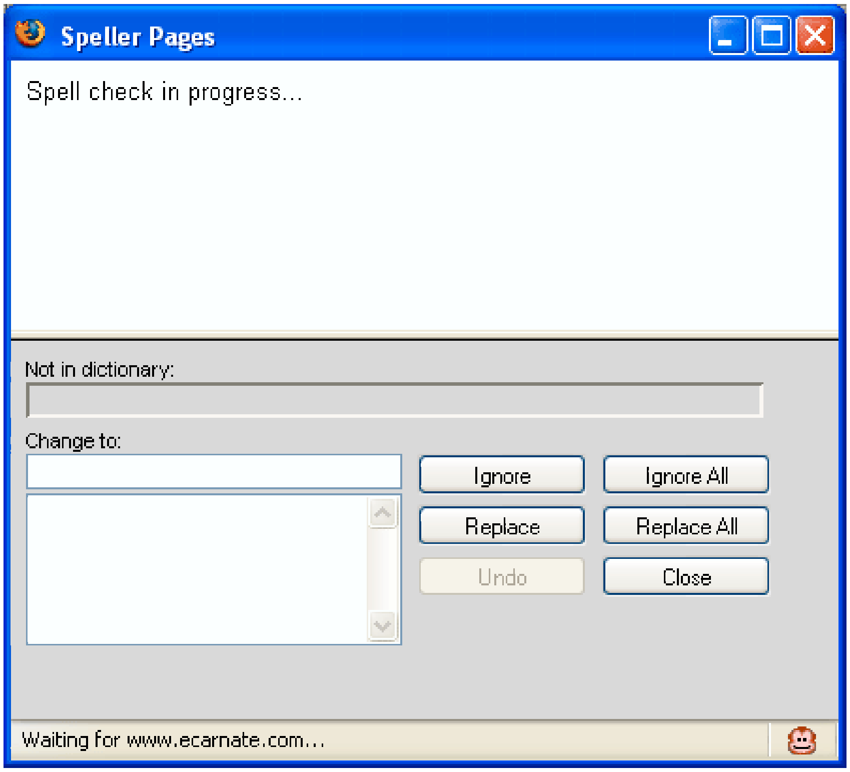
If being sent out as an e-mail (see the Send E-mail option), the files will be attached to the outgoing e-mail. They will also be available from within the **client support interface**.

The attached file will also be available through the staff's view of the reply, as shown below.

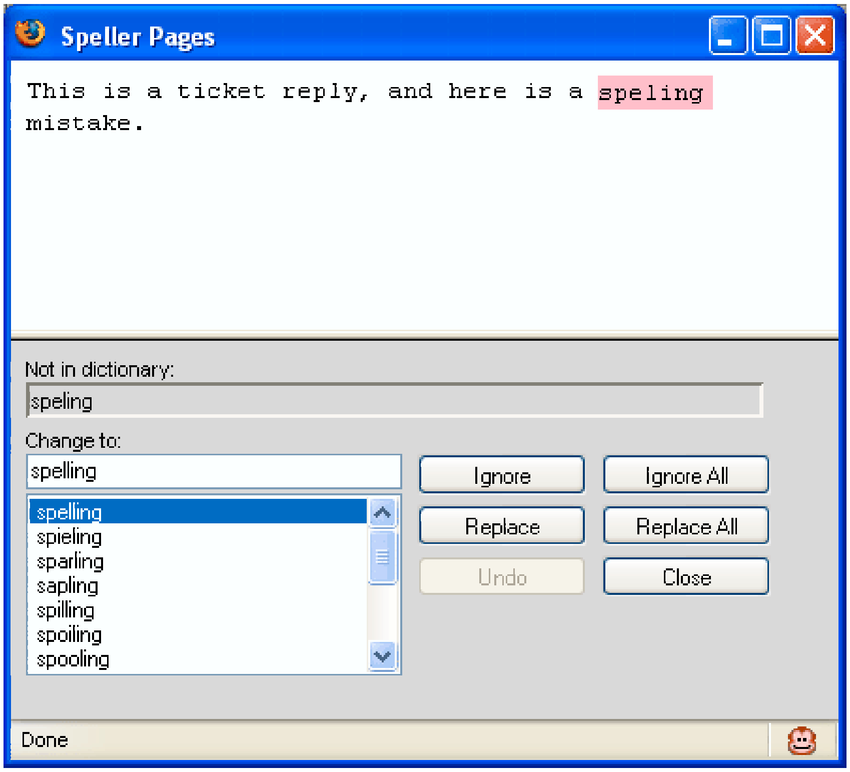


Spell check

Clicking on the **spell check** button will open up the **spell checker** that will start performing a spell check, as shown below.



After spell checking is complete, you will be taken through each unrecognized word with the options to **Ignore** the spelling mistake or **Replace** the spelling mistake with a suggestion, and so on.

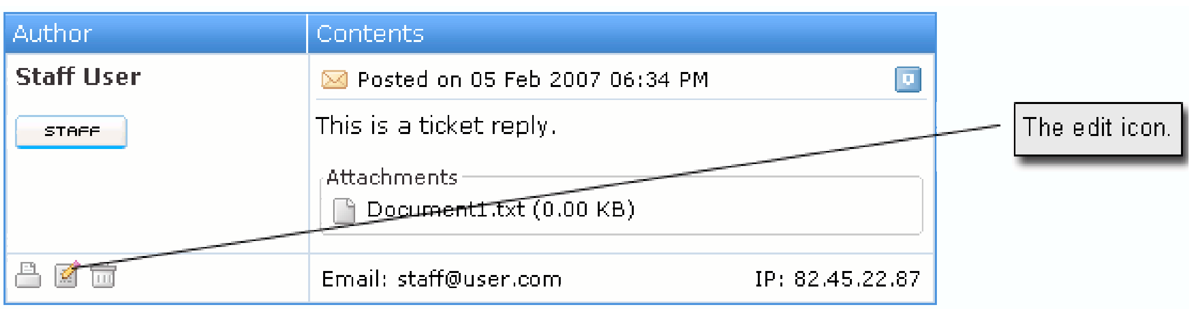


Any changes done using the spell checker will be automatically amended to your ticket reply area after clicking on the **Close** button.

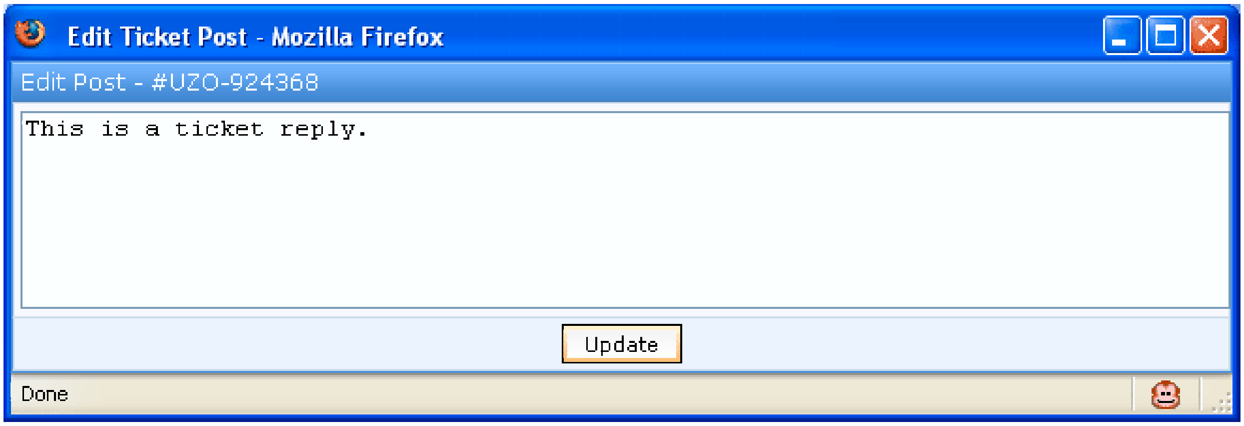
Editing a ticket

Editing a ticket reply's post content

The contents of a ticket reply can be edited via the ticket body view by clicking on the edit icon, as shown below.



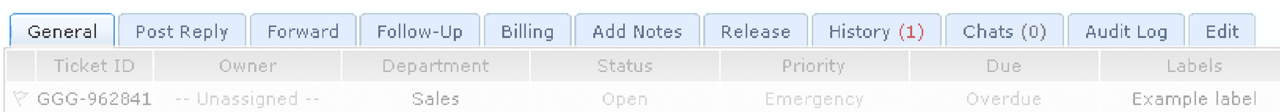
Clicking on this icon will open an editable window that allows editing of the reply's contents, as shown below.



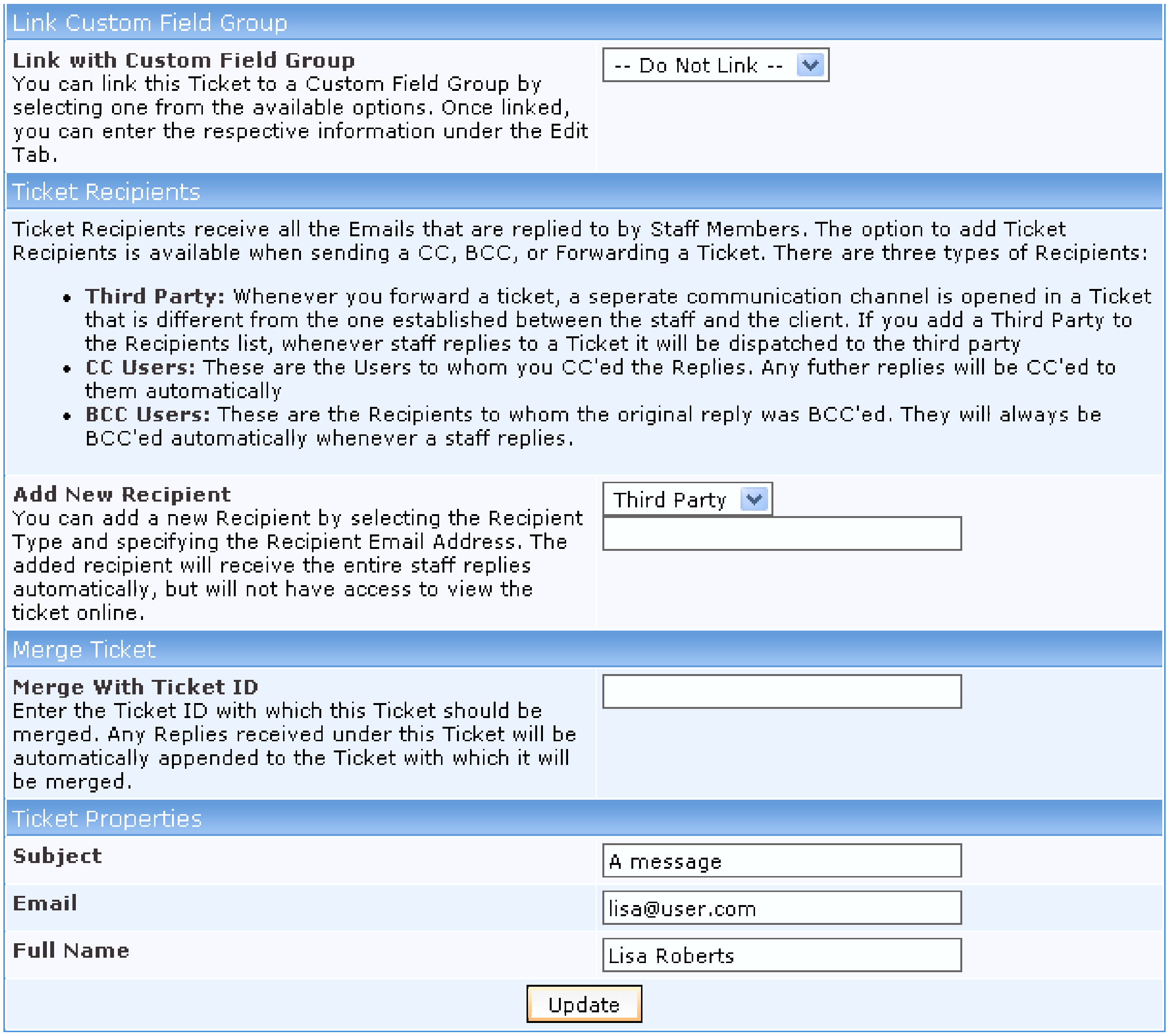
Following submission of the changes, an **edited by** note will be appended to the bottom of the ticket reply, as shown below.

Editing ticket options

A ticket's options can be edited using the **ticket management menu**, as shown below.



Click on the **Edit** tab to open a list of editable ticket fields, as shown below.



Link Custom Field Group

Custom field groups are managed within the administrator control panel. A ticket can be linked to a set of custom fields. Once linked, custom fields can be edited for this ticket by returning to the Edit tab (shown above).

Ticket Recipients

For more detailed information on CC, BCC and third party recipients see CC, BCC and third party recipients.

Merge Ticket

Merge With Ticket ID – to merge the current ticket to another ticket, enter the ID of the second ticket here. The ticket replies will all be merged chronologically, and the current ticket will be deleted. The ticket creator’s address of the current ticket will be added as a CC user to the new, merged ticket.

Ticket Properties

Subject – the subject of the ticket.

Email – the e-mail address of the ticket creator (primary recipient).

Full Name – full name of the ticket creator.

Creating a ticket

Tickets can be created by staff users in the form of an **e-mail ticket** (which can also be considered as sending or starting an e-mail to a user) or a **phone ticket** (for example, if a phone call is taken and needs to be logged as a ticket).

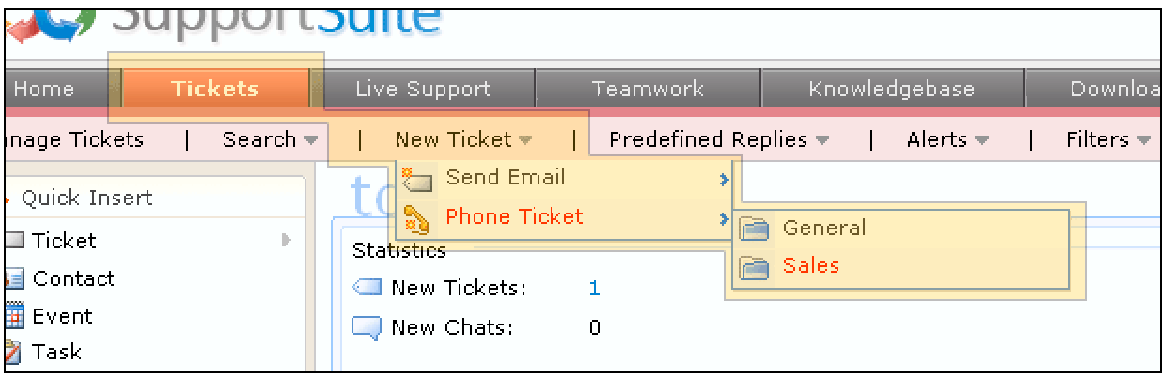
E-mail ticket (sending an e-mail)

A staff user can create an **e-mail ticket** from within the **staff control panel**. "Creating a ticket" can also be referred to as sending an e-mail to a user.

A ticket can be created via the **quick-insert menu** and the **navigation menu**.

Via the navigation menu:

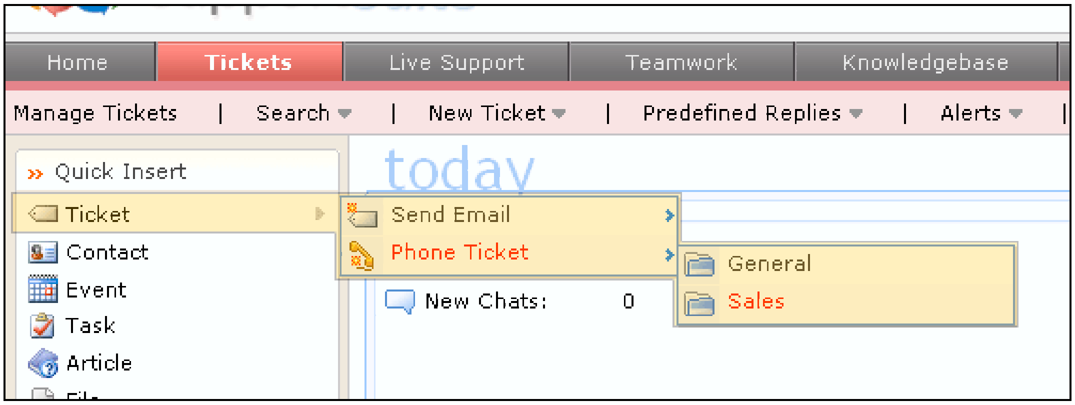
1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **New Ticket** sub-menu.
3. Hover over the **Send Email** menu.
4. Click on the **department** in which you wish to create the ticket.

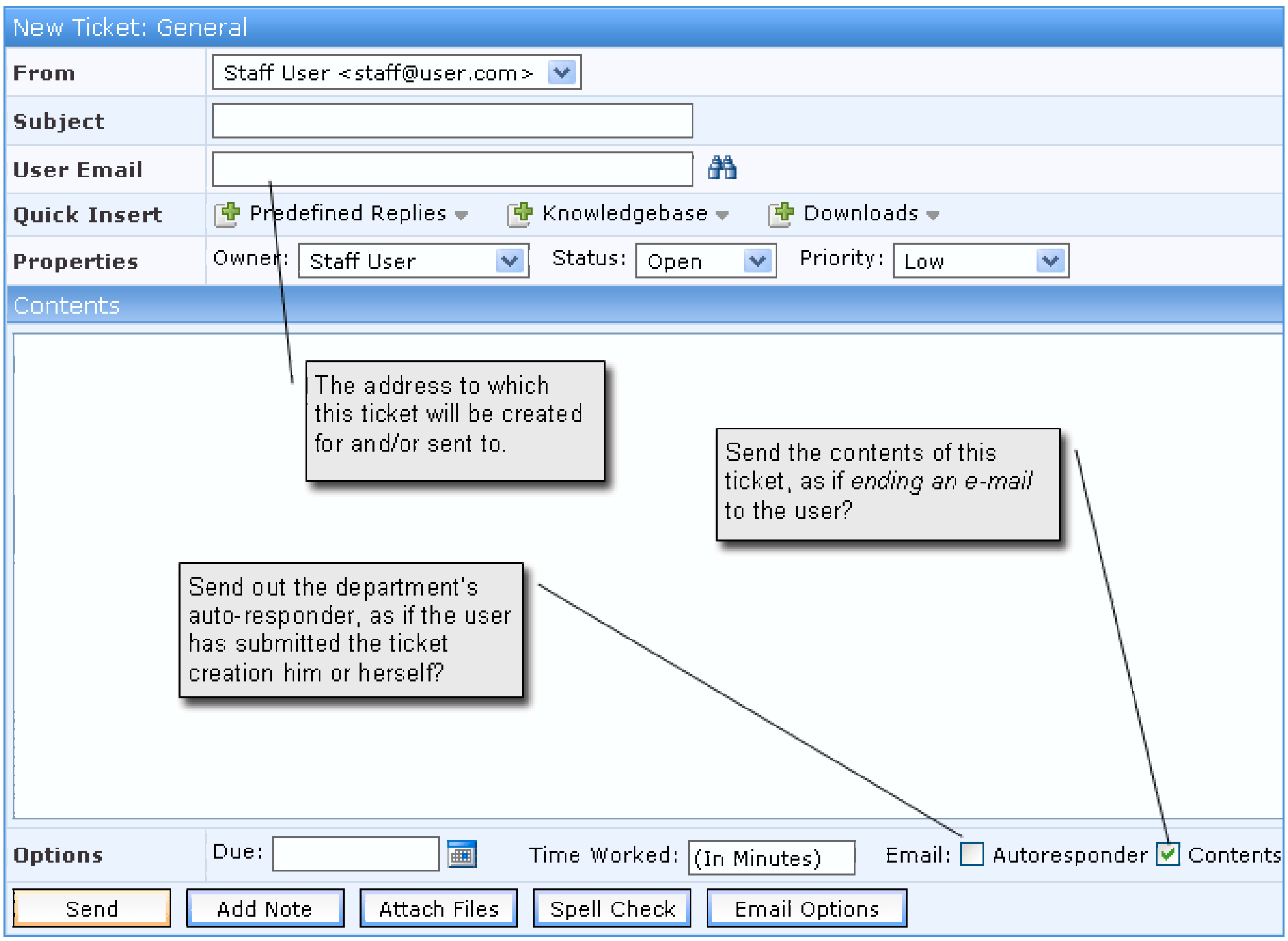
Via the quick-insert menu:

1. Open **Tickets** on the quick-insert menu, as shown below.



2. Open the **New Ticket** sub-menu.
3. Hover over the **Send Email** menu.
4. Click on the **department** in which you wish to create the ticket.

The create ticket interface will then be introduced, as shown below.



Other than the fields detailed above, the **create ticket interface** is much the same as the standard **ticket reply interface**, which is documented in replying to a single ticket. Some ticket reply options are not available in the **create ticket interface**, as they relate specifically to a ticket that already exists.

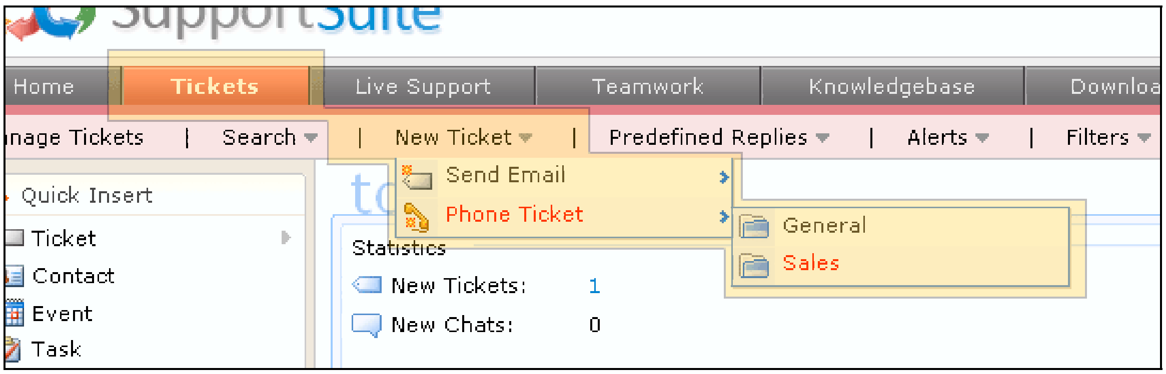
Phone ticket

A staff user can create a **phone ticket** from within the **staff control panel**.

A ticket can be created via the **quick-insert menu** and the **navigation menu**.

Via the navigation menu:

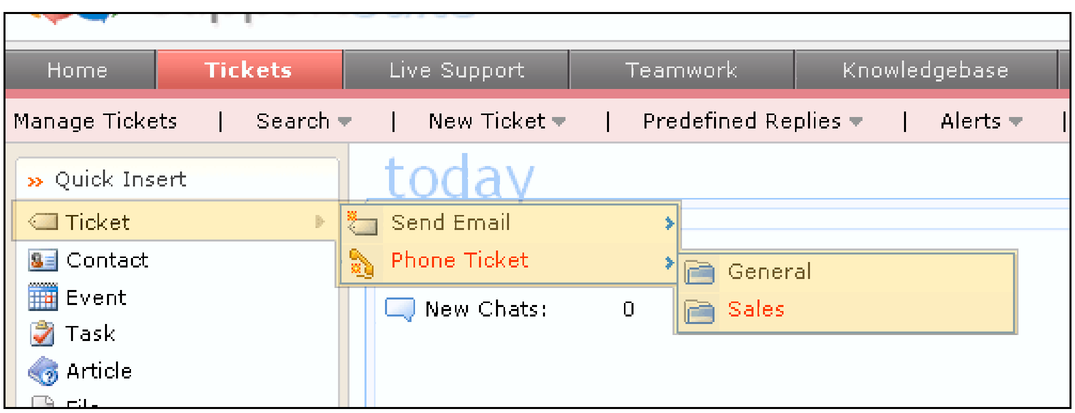
1. Open **Tickets** on the navigation menu bar, as shown below.



2. Open the **New Ticket** sub-menu.
3. Hover over the **Phone Ticket** menu.
4. Click on the **department** in which you wish to create the ticket.

Via the quick-insert menu:

1. Open **Tickets** on the quick-insert menu, as shown below.

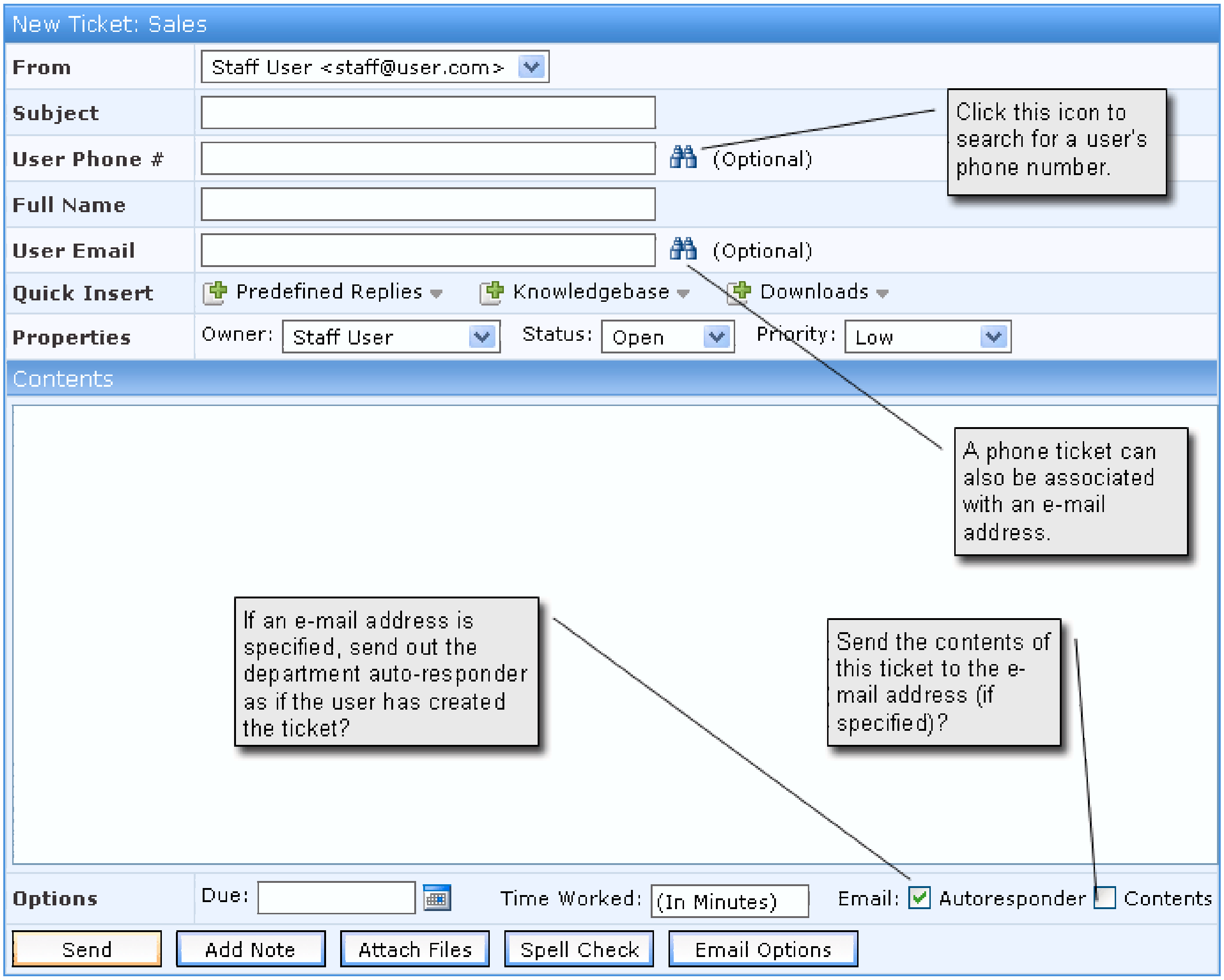


2. Open the **New Ticket** sub-menu.

3. Hover over the **Phone Ticket** menu.

4. Click on the **department** in which you wish to create the ticket.

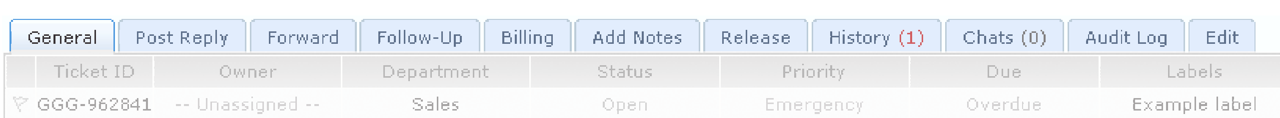
The create ticket interface will then be introduced, as shown below.



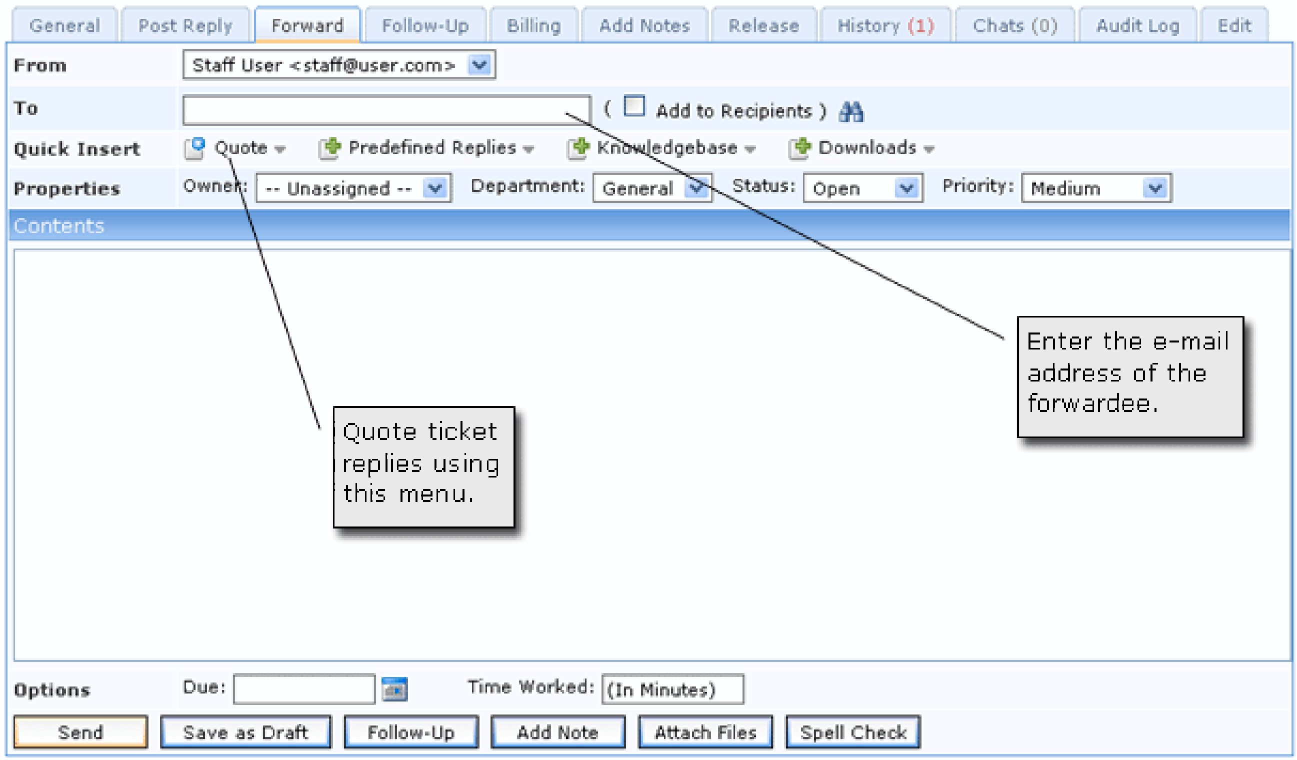
Other than the fields detailed above, the **create ticket interface** is much the same as the standard **ticket reply interface**, which is documented in replying to a single ticket. Some reply ticket options are not available in the **create ticket interface**, as they relate specifically to a ticket that already exists.

Forwarding a ticket

A ticket can be forwarded using the **ticket management menu**, as shown below.



Click on the **Forward** tab to open the ticket forward interface, as shown below.



Forwarding a ticket is very much the same as creating a new ticket (sending an e-mail), with the exception that under **Quick Insert** you are able to quote ticket posts from the ticket history.

Forwarding a ticket to the recipient defined (as shown above) opens a separate communication channel what that user (as in, a completely new ticket).

However, if you click on the **Add to Recipients** box (as shown above), the forwardee will be added as a third party recipient (for more information on third party recipients, see CC, BCC and third party recipients). In this case, the third party can make ticket replies to the "current" ticket, rather than have them added to a separate ticket.

CC, BCC and third party recipients

CC User – a CC user who has been added to a ticket is carbon copied all replies sent by a staff user.

BCC User – a BCC user who has been added to a ticket is blind-carbon copied all replies sent by a staff user.

Third Party / Recipient – a third party recipient added to a ticket is carbon copied all replies sent by a staff user. A third party is able to send e-mail replies and have them appended to the ticket that was not originally created by them.

Note that adding an e-mail address as a recipient does not give a user behind this e-mail address access to the **client support interface**.

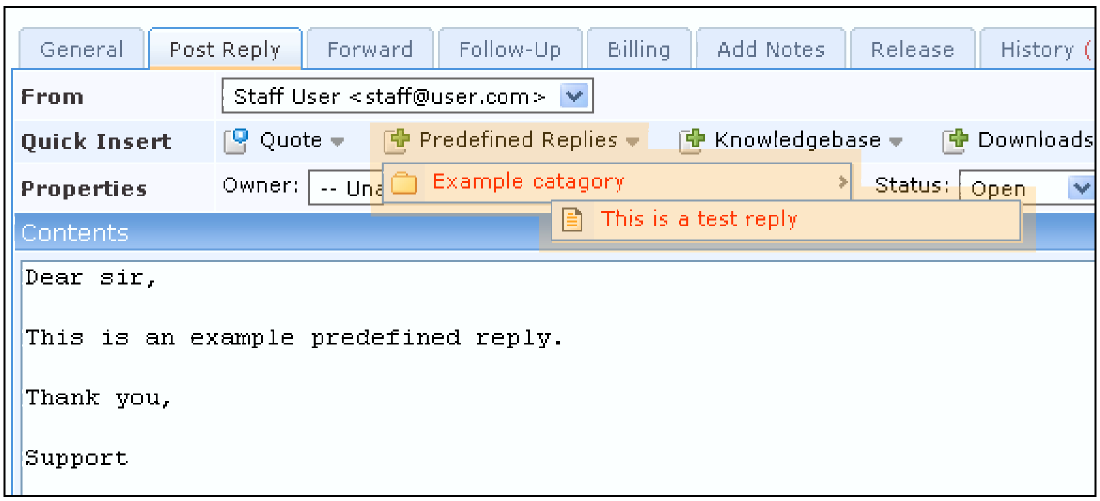
Whether or not a user gets to see third party recipient replies in the client support interface is configured in the administrator control panel (see ticket settings in the administrator control panel).

Predefined replies

A **predefined reply** is more commonly known as a **standard reply** – a ticket reply that has already been typed up and saved for re-use, either as a reply or as a template for a reply.

Using predefined replies

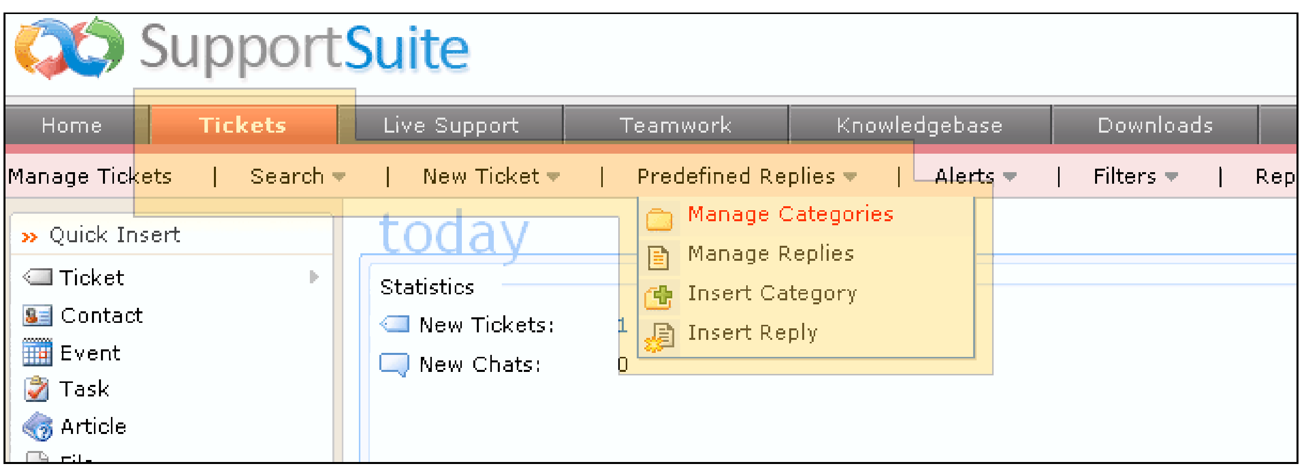
When replying to or creating a ticket, a **predefined reply** can be sourced and inserted using the **quick-insert** menus, as shown below.



Managing predefined reply categories

To view and manage predefined reply categories:

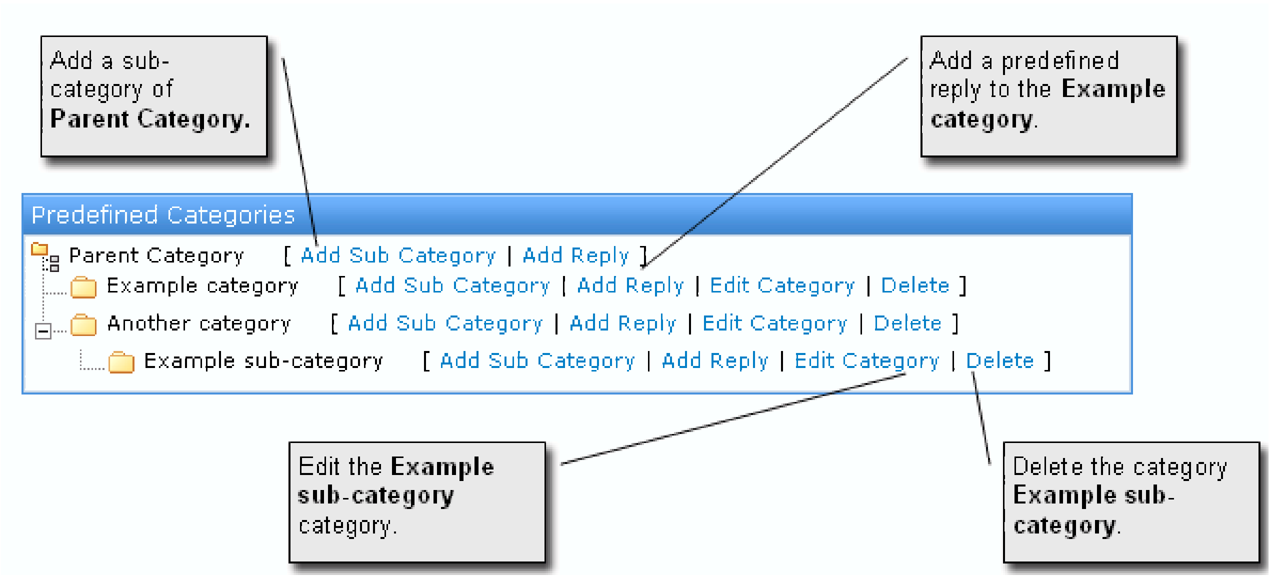
1. Open **Tickets** on the navigation menu, as shown below.



2. Open the **Predefined Replies** sub-menu.

3. Click on **Manage Categories**.

A list of all predefined reply categories will be presented, as shown below.



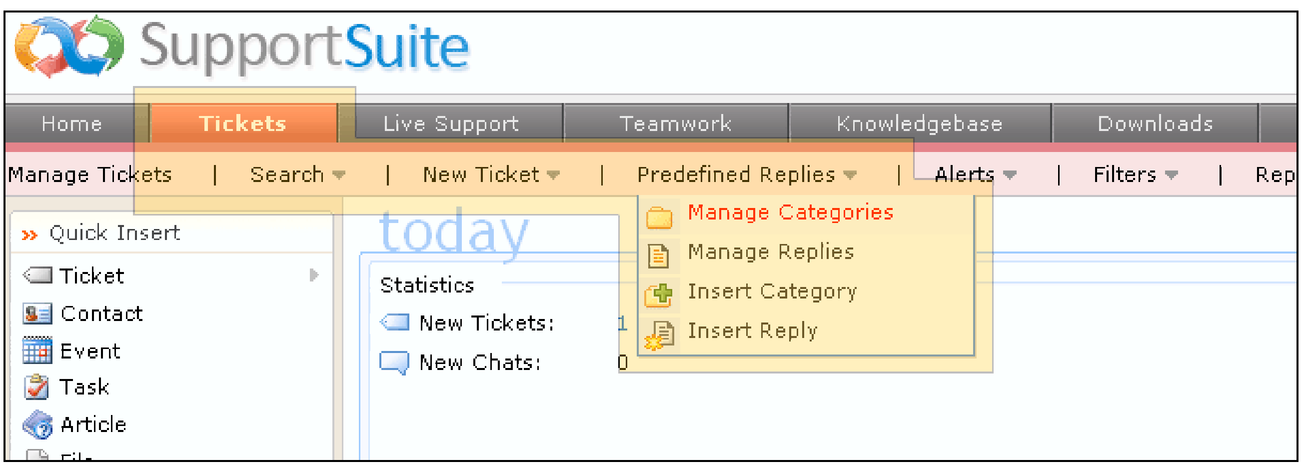
To **edit** a category, click on the corresponding **edit category** link.

Refer to predefined reply category fields for documentation on the required fields for a new predefined category.

Creating a category

To create a predefined reply category:

1. Open **Tickets** on the navigation menu, as shown below.

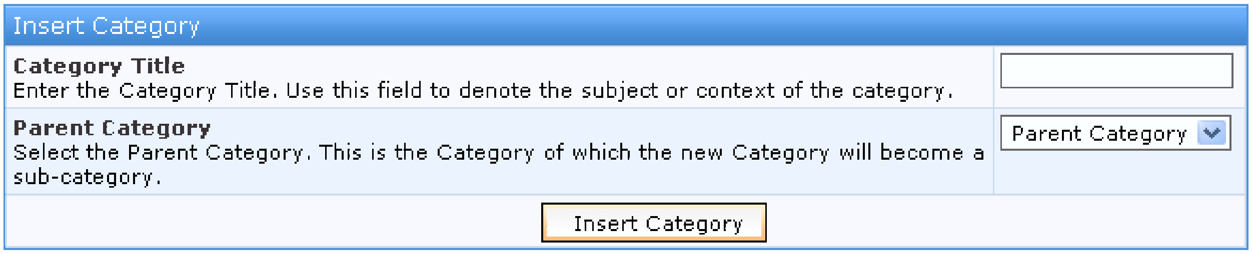


2. Open the **Predefined Replies** sub-menu.

3. Click on **Insert Category**.

Refer to predefined reply category fields for documentation on the required fields for a new predefined category.

Predefined reply category fields

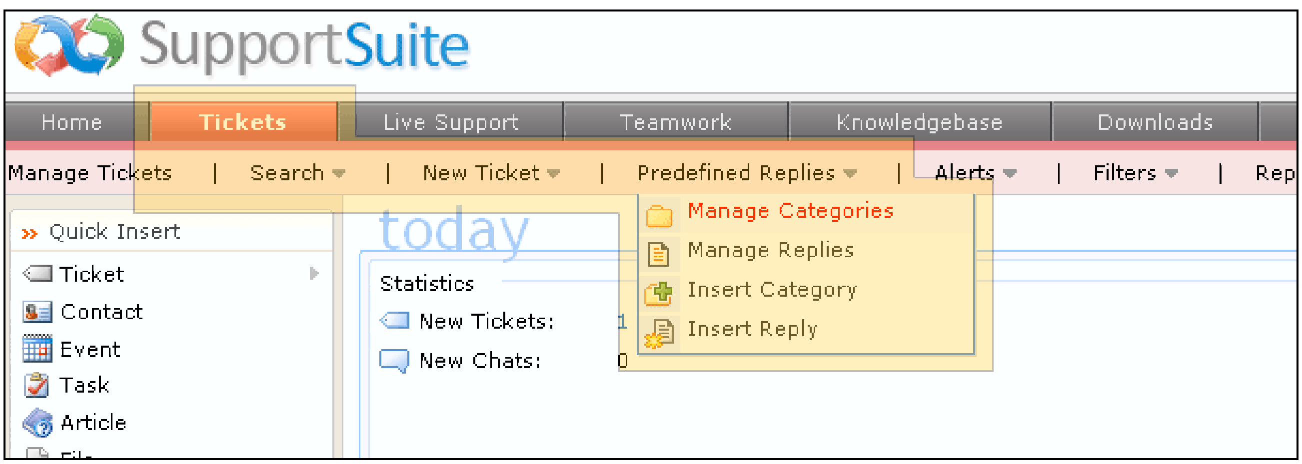


- **Category Title** – the title of the category.
- **Parent Category** – if the category is a sub-category of another, set the parent category here.

Managing predefined replies

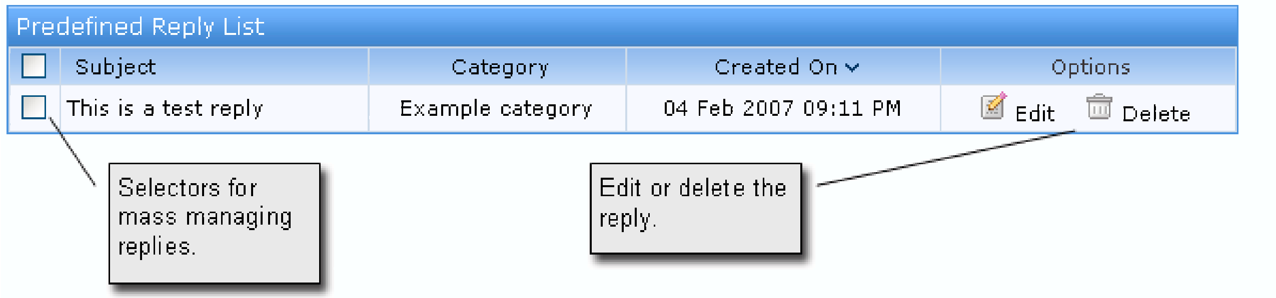
To manage predefined replies:

1. Open **Tickets** on the navigation menu, as shown below.

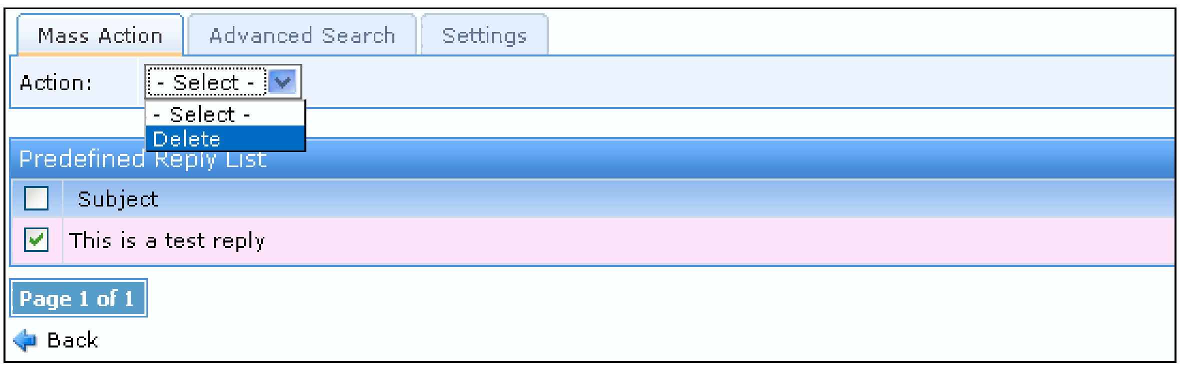


2. Open the **Predefined Replies** sub-menu.
3. Click on **Manage Replies**.

A list of all predefined replies and their respective categories will be presented, as shown below.



Selecting multiple predefined replies (by checking the corresponding check boxes) will open the **mass-management menu**, as shown below. Using this menu, replies can be mass-deleted. Under the **Advanced Search** tab, replies can be searched for by name. Under the **Settings** tab, the number of replies shown per page (if there are many) can be limited.



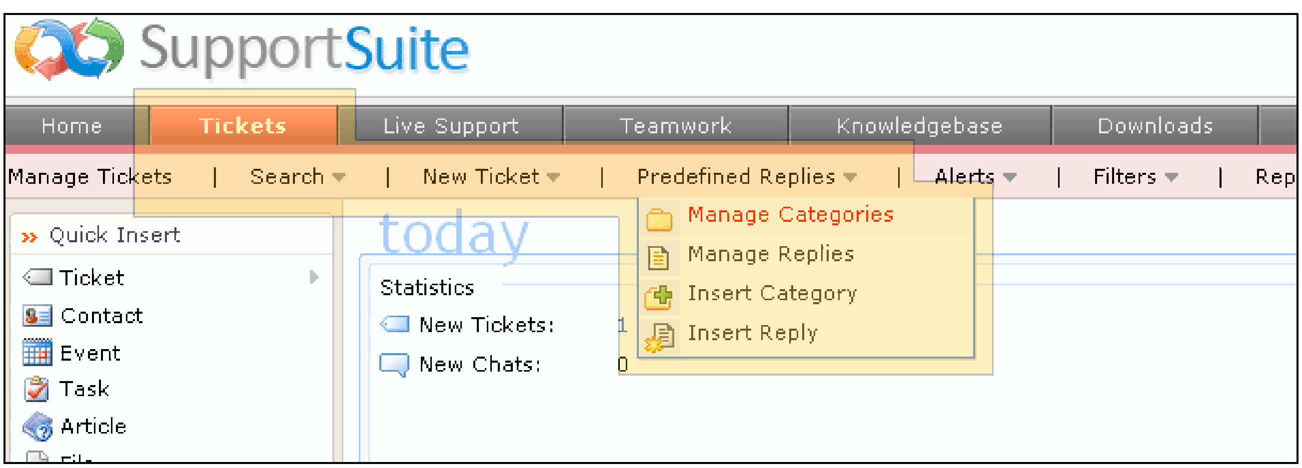
To **edit** a predefined reply, click on the corresponding edit icon.

Refer to predefined reply fields for documentation on the required fields for a new predefined reply.

Creating a predefined reply

To create a predefined reply:

1. Open **Tickets** on the navigation menu, as shown below.

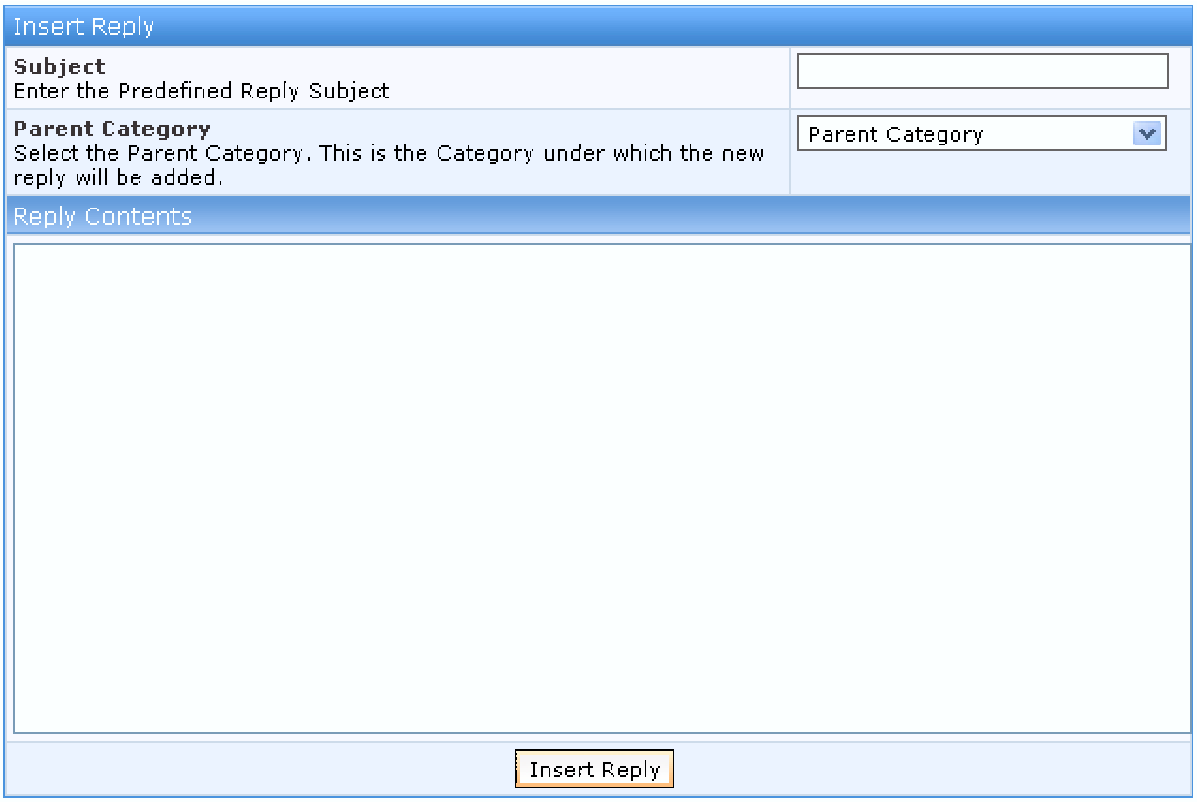


2. Open the **Predefined Replies** sub-menu.

3. Click on **Insert Reply**.

Refer to predefined reply fields for documentation on the required fields for a new predefined reply.

Predefined reply fields



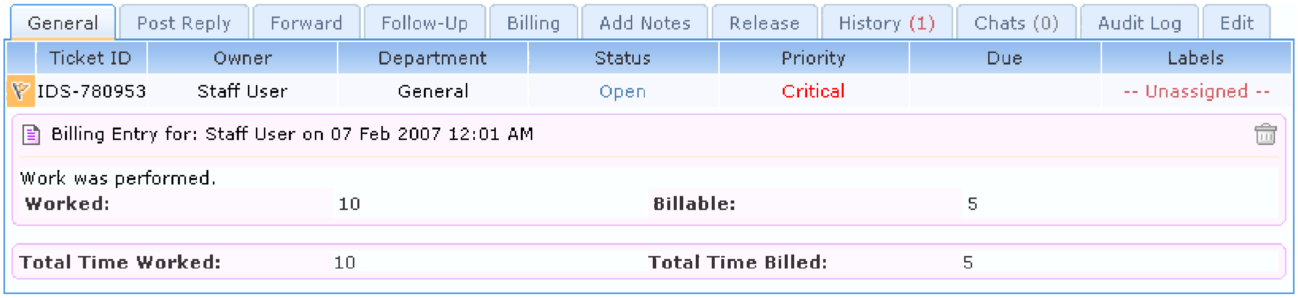
- **Subject** – the title of the predefined reply.
- **Parent Category** – the category in which the predefined reply will be saved.
- **Reply Contents** – the contents of the predefined reply.

Billing information and time tracking

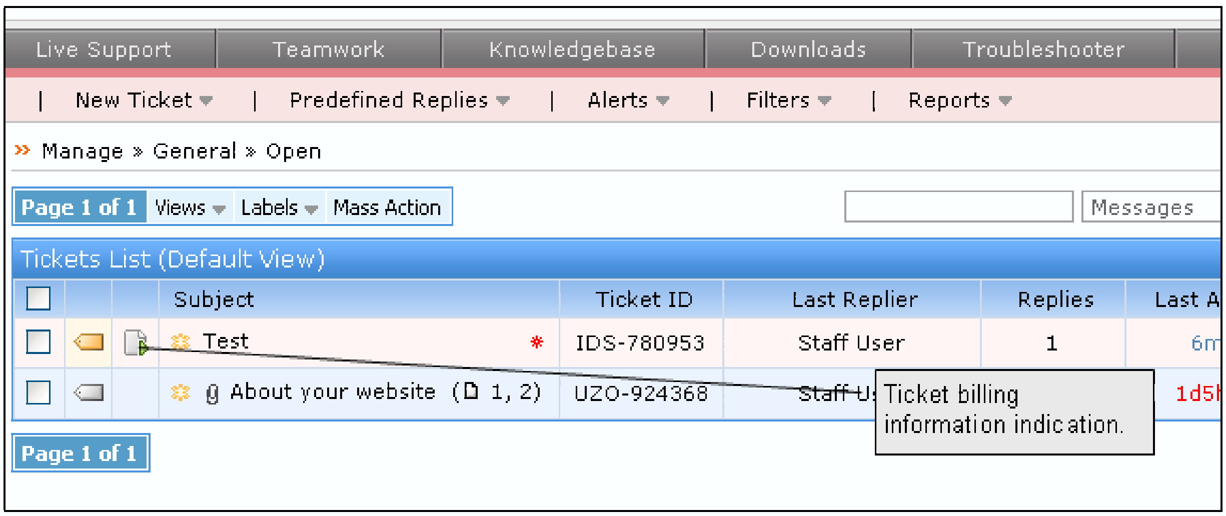
The time spent working on a ticket and what of that is billable can be logged to a ticket, including a work summary.

Viewing billing and time tracking information

Time tracking and billing information for a ticket (if the data exists) will appear on the **ticket information bar** when viewing a ticket, as shown below.

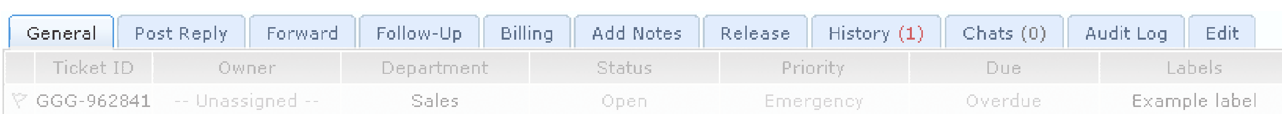


When billing or time tracking information has been added to a ticket, a ticket billing indication icon will be given within a **ticket listing**, as shown below.

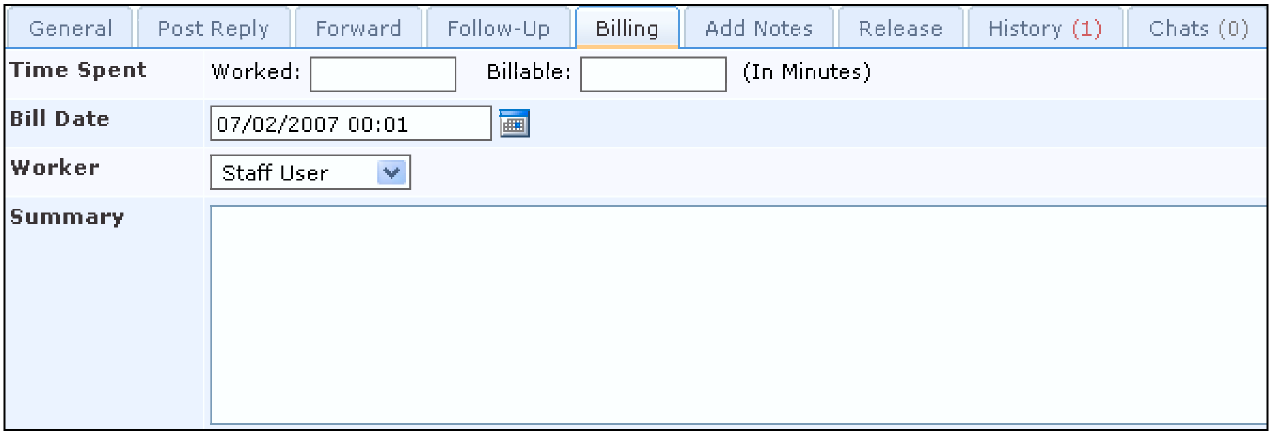


Adding billing and time tracking information

Time tracking information can be logged to a ticket via the **ticket management menu** when viewing a ticket, as shown below.

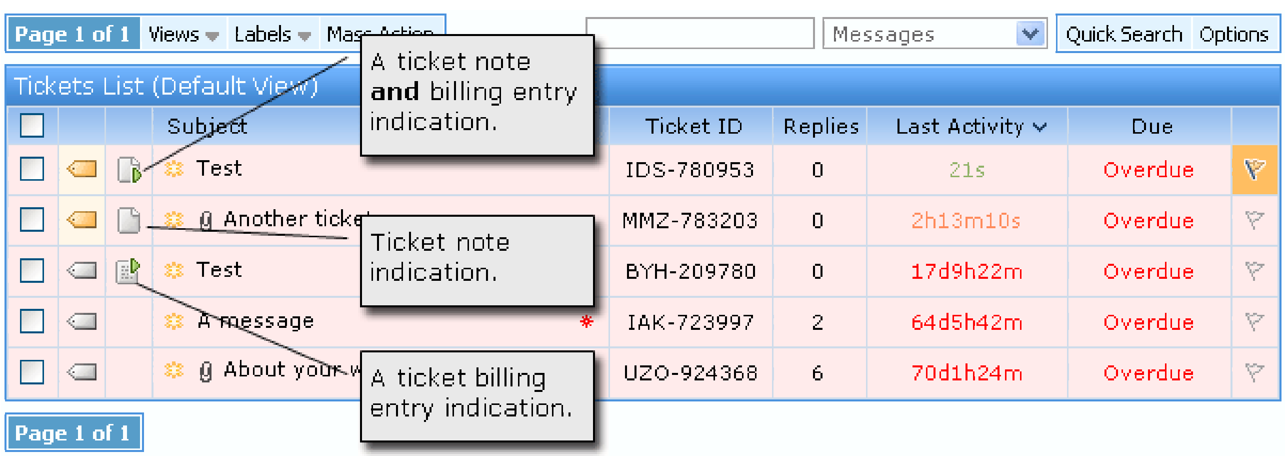


To add time tracking information to a ticket, click on the **Billing** tab. This will open the billing/time tracking interface, as shown below.



- **Time Spent**
  - **Worked** – the time spent (in minutes) working on this entry.
  - **Billable** – the time (in minutes) that are billable.
- **Bill Date** – the time of billing.
- **Worker** – which staff user performed the recorded work.
- **Summary** – details of the log.

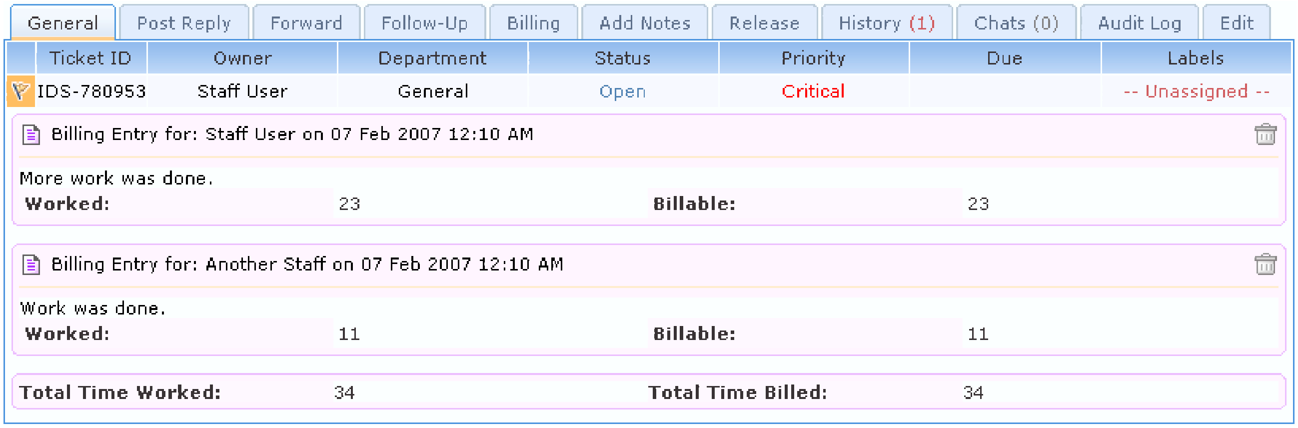
When a billing or time tracking information has been added to a ticket an indication will be shown on a ticket listing, as shown below.



Removing billing or time tracking information

Time tracking and billing information for a ticket (if the data exists) will appear on the **ticket information bar** when viewing a ticket. As well as this, a **trash can** icon will appear next to each entry.

To delete an entry, click on its corresponding trash can icon, as shown below.

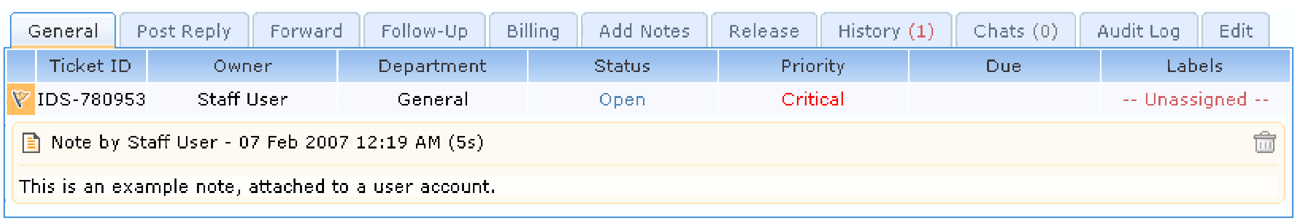


Ticket and user notes

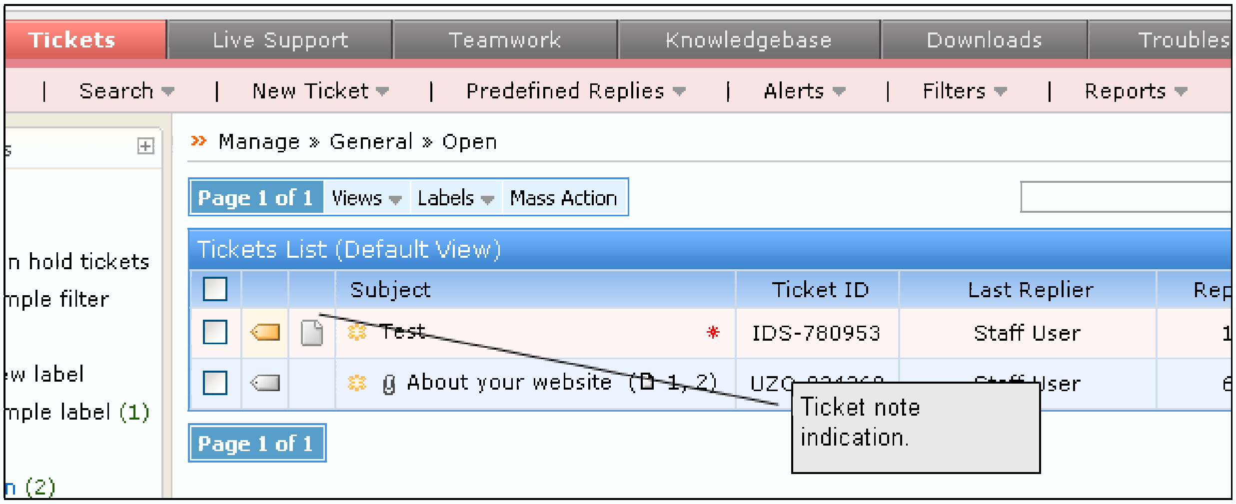
Notes can be attached to tickets or user (client) accounts. These notes can be viewed only by **staff users** (or **specific staff users** – this is defined at note creation). Notes can be used to share information between staff users, or simply as a record whilst working on a ticket or dealing with a client.

Viewing a note

A note that is attached to a ticket will be visible on the **ticket information bar** when viewing the corresponding ticket. A note that is attached to a user account will be visible in the same place for **every** ticket the user creates, as shown below.

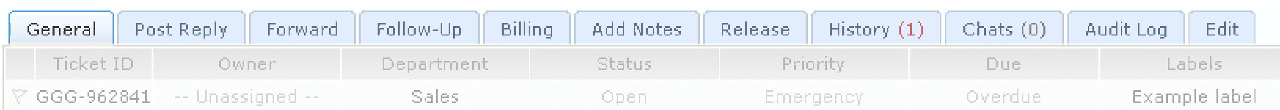


An indication that a note has been attached to the ticket will also be given from within a **ticket listing**, as shown below.

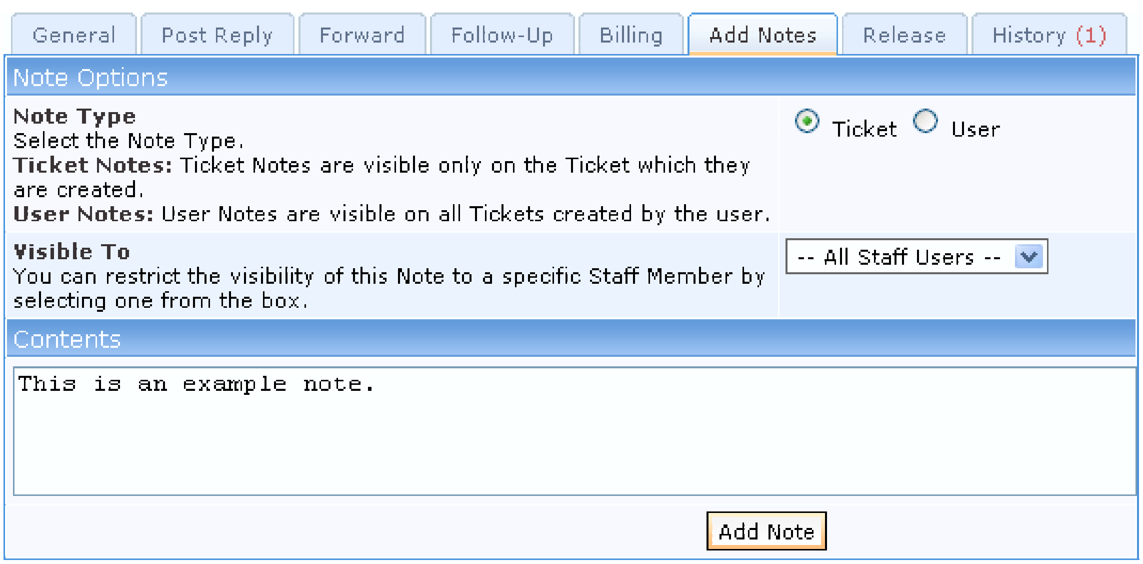


Adding a note

Notes can be attached to a ticket or user via the **ticket management menu** when viewing a ticket, as shown below.

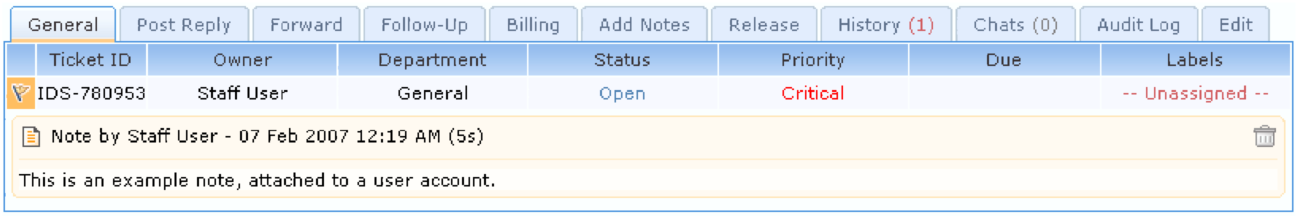


To add a note, click on the **Add Notes** tab. This will open the **add note** interface, as shown below.

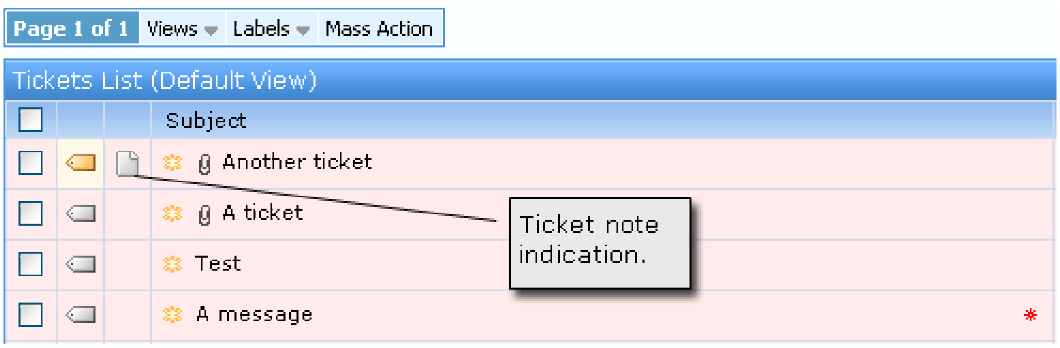


- **Note Type** – whether the note will be attached to the ticket or to the user account of the ticket creator.
- **Visible To** – to whom the note will be visible to. A note can be visible to all staff members or a specific staff member.
- **Contents** – the contents of a note.

Once a note has been added, it can be viewed on the ticket information bar, as shown below.



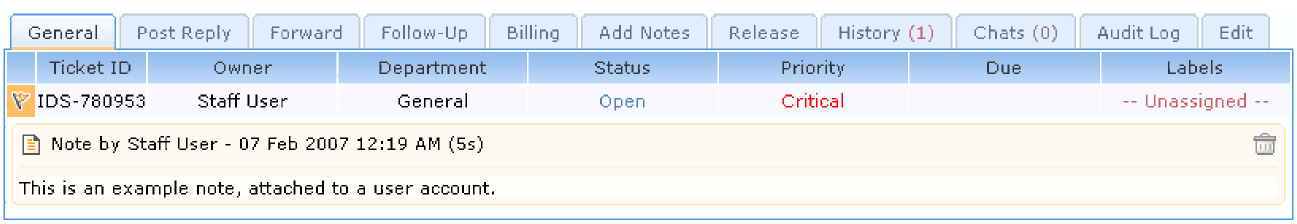
An indication that the ticket has had a note added to it will also be shown on a ticket listing, as shown below.



Note that when a note is added to a **user account**, the note will be visible on all tickets created by this user. The user will still not be able to see this note, however.

Deleting a note

Notes can be deleted via the **ticket information bar** when viewing a ticket, as shown below.



As well as this, a **trash can** icon will appear next to each note. To delete a note, click on its corresponding trash can icon.

Automatic ticket follow-ups

Ticket follow-ups allow for the **post dating** of ticket handling actions.

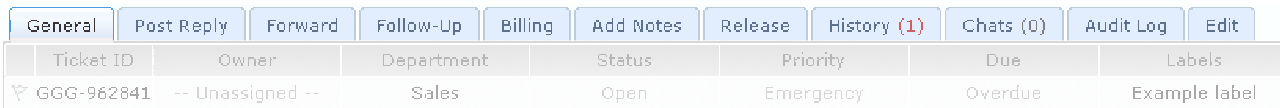
Here are some example uses of the ticket follow-up system:

- Using the ticket follow-up a reply to a ticket can be made "in the next X minutes".

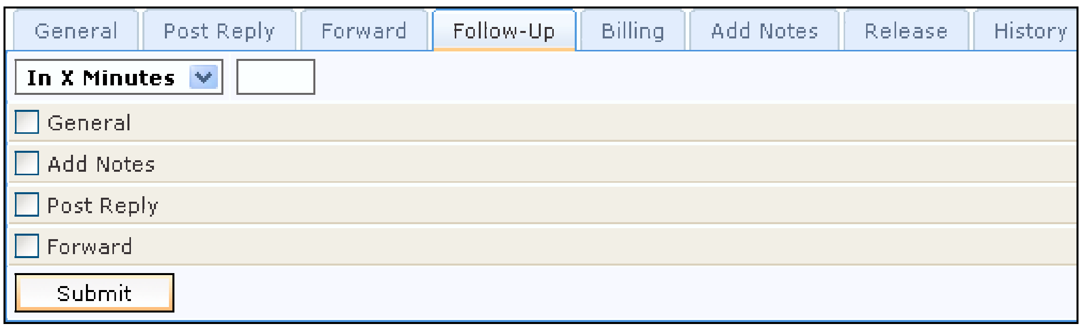
- To have an ongoing "Invoices" ticket that is closed by a staff member when paid, but as a ticket follow-up is told to reopen in 30 days time and post a ticket-reply, reminding the user that the next payment is due.

Adding a follow-up action

To add a follow-up action, click on the **Follow-Up** tab on the **ticket management menu** when viewing a ticket, as shown below.



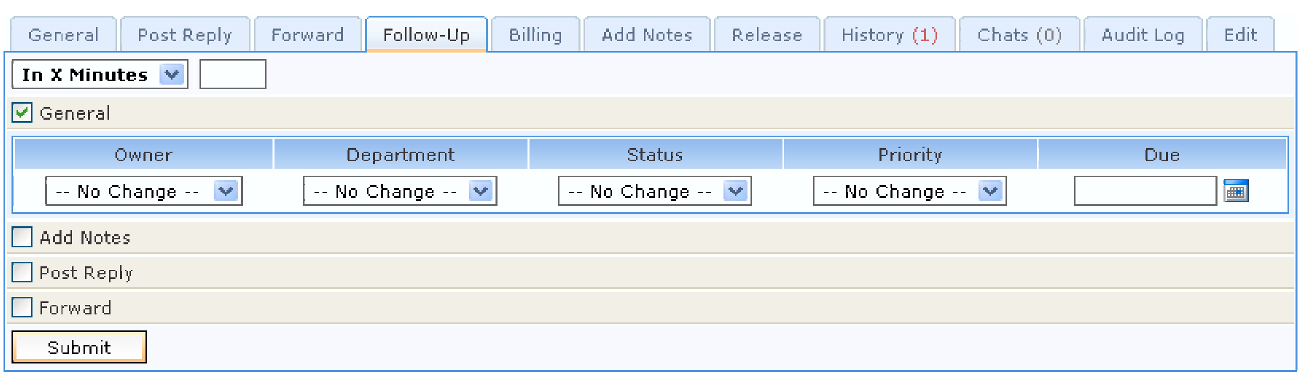
The follow-up actions interface will be opened, as shown below.



Follow-up actions can be combined. For example, a ticket can be replied to as well as opened within the same follow-up entry.

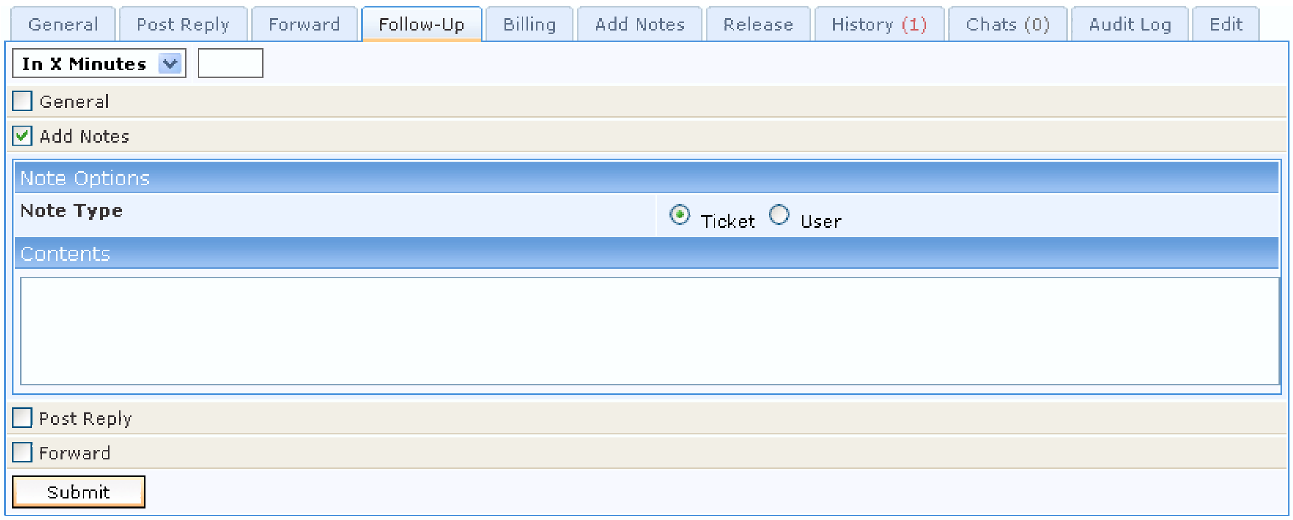
The **general** actions can be used to:

- Change the owner (ticket assignment) of a ticket.
- Change the department a ticket resides in.
- Change a ticket's status.
- Change a ticket's priority.
- Set a due time for the ticket.



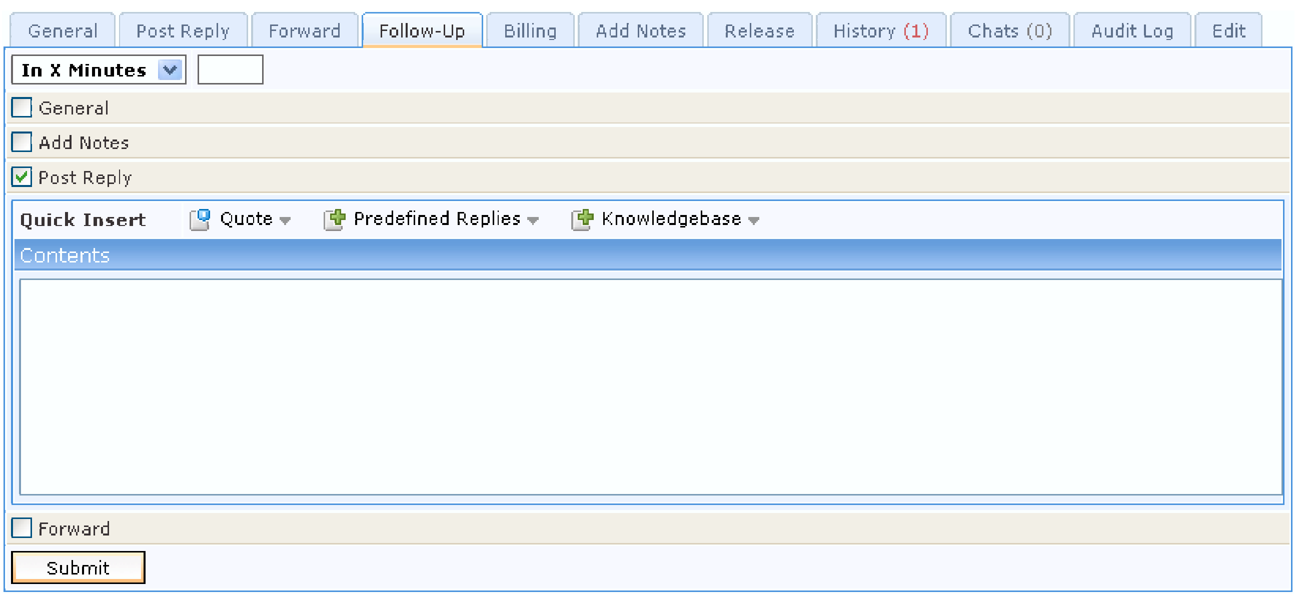
The **add notes** action can be used to:

Add a note to a ticket or user. For more information on ticket and user notes, see ticket and user notes.



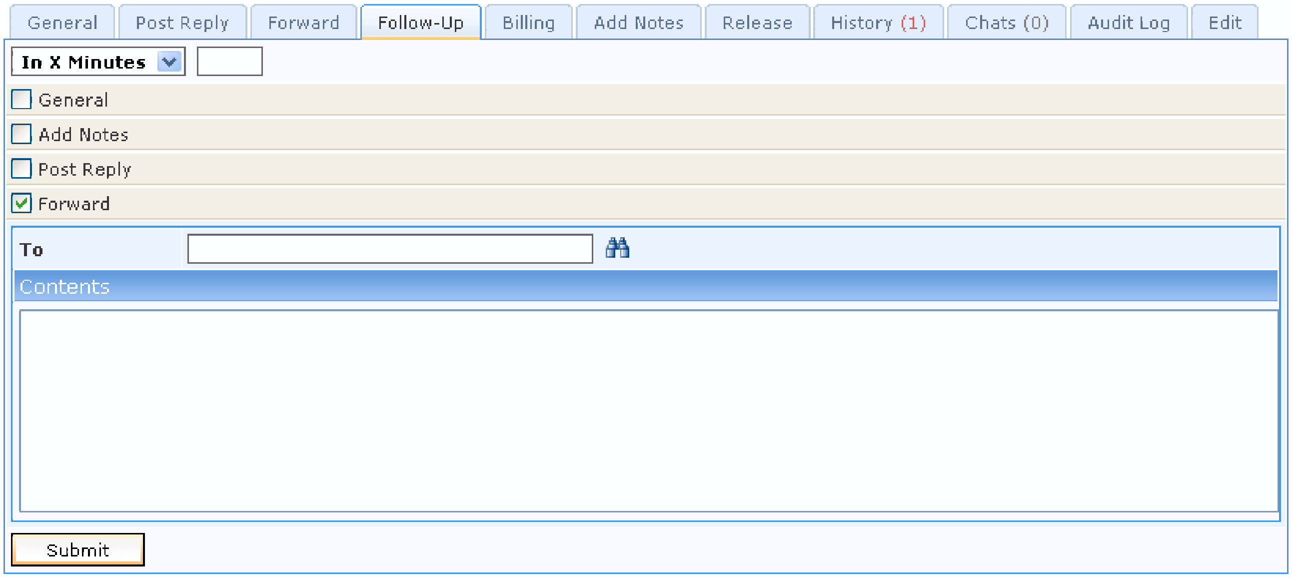
The **post reply** action can be used to:

Post a ticket reply to the ticket. For more information on ticket replies, see replying to a single ticket.

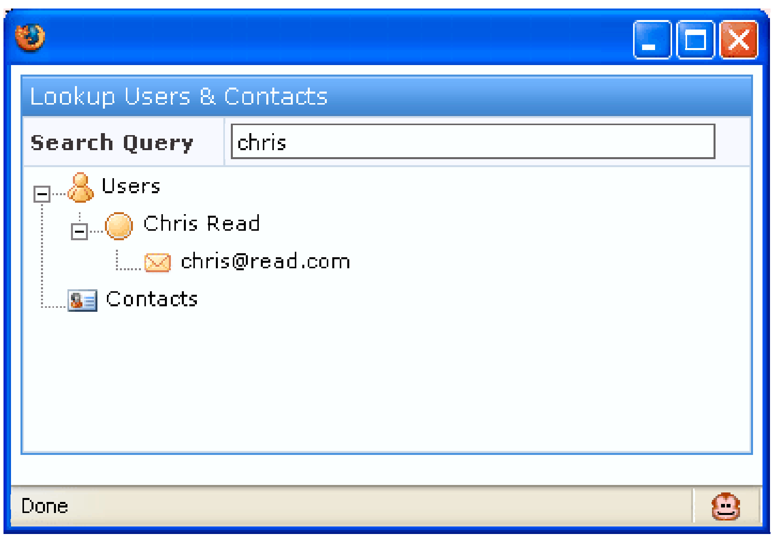


The **forward** action can be used to:

Forward the ticket to an address. For more information on ticket forwarding, see forwarding a ticket.



Clicking on the **binoculars** icon will open up a contacts search window, allowing the search of addresses stored in the **contacts list** and **user accounts**, as shown below.



The search will be performed **as you type**. Clicking on a matched e-mail address will insert the address into the **Forward To** field.

Ticket and chat history records

SupportSuite databases a **ticket** and **chat** history for all user accounts.

A ticket and chat history for a user can be viewed in two areas – from within a ticket created by the user and from within the user's account page within the **staff control panel**.

From within a ticket, the **ticket** can be accessed from the **ticket management menu** by clicking on the **History** tab, as shown below.

General | Post Reply | Forward | Follow-Up | Billing | Add Notes | Release | History (2) | Chats (0) | Audit Log | Edit

Ticket ID	Subject	Date	Department	Status	Priority
UZO-924368	About your website	18 Jan 2007 01:22 PM	General	Open	High
YRT-584563	Another ticket from me	07 Feb 2007 09:46 PM	General	Open	Urgent

Similarly, the **chat** history is accessed by clicking on the **Chats** tab, as shown below.

General | Post Reply | Forward | Follow-Up | Billing | Add Notes | Release | History (2) | Chats (6) | Audit Log | Edit

Chat ID	Full Name	Staff Name	Department	Date
1	Chris	Test	General	07 Feb 2007 10:12 PM
2	Chris	Test	General	07 Feb 2007 10:13 PM
3	Chris	Test	General	07 Feb 2007 10:14 PM
4	Chris	Test	General	07 Feb 2007 10:23 PM
5	Chris	Test	General	07 Feb 2007 10:30 PM
6	Chris	Test	General	07 Feb 2007 10:34 PM

Clicking on the **Full Name** of the user will take you to the corresponding chat history. For more information, see chat history.

Ticket audit log

The **audit log** of a ticket details every action performed by the **user**, **system** or a **staff user** on a ticket. The audit log provides a powerful way of overseeing the path a ticket has taken through the support system, and is secure in that log entries cannot be modified using the SupportSuite interface.

An example of a ticket's audit log is shown below.

General | Post Reply | Forward | Follow-Up | Billing | Add Notes | Release | History (2) | Chats (6) | Audit Log | Edit

Description	Date	Timeline	Entry Type
Setting Due Time To: 08 Feb 2007 09:46 PM	07 Feb 2007 09:46 PM	23h8m30s	System
New Ticket Created By Chris	07 Feb 2007 09:46 PM	23h8m30s	Client
Ticket Department Changed From: General To: Sales	08 Feb 2007 08:39 PM	15m46s	Staff User (Staff)
Setting Due Time To: 09 Feb 2007 08:39 PM	08 Feb 2007 08:39 PM	15m46s	System
Ticket Due Time Cleared By: Staff User	08 Feb 2007 08:39 PM	15m26s	Staff User (Staff)
New Reply Created By Staff User (staff@user.com)	08 Feb 2007 08:39 PM	15m26s	Staff User (Staff)
Ticket Due Time Set To: 10 Feb 2007 12:00 AM By: Staff User	08 Feb 2007 08:39 PM	15m26s	Staff User (Staff)

The **oldest** action will be shown first. When two actions (for example) are logged at exactly the same time (as shown above – "Setting Due Time" and "New Ticket Created"), the very first action logged will be displayed **second**.

This is a listing quirk that occurs because the actions occurred at exactly the same time. Obviously, the ticket was **created** first and then the **due time** was set by the system for the new ticket.

A logged action performed by the system will have an **Entry Type** of **System**. Some system actions include automatically setting a **due time** according to an SLA plan, or automatically **closing** a ticket if auto-close has been enabled from within the **administrator control panel**.

The following actions will be logged by the audit log:

- **New Ticket Created By: X** – log of the ticket creation.
- **New Reply Created By: X** – log of a ticket reply by the client or a staff user.
- **New Forward Message Created By: X** – the ticket and some of or all of the reply contents have been forwarded by a staff user.
- **Ticket Owner Changed From X To: Y** – the owner of a ticket has been changed (the ticket has been reassigned).
- **Ticket Priority Changed From: X To: Y** – the priority of the ticket has been changed.
- **Ticket Status Changed From: X To: Y** – the status of the ticket has been changed.
- **AUTO CLOSE: Ticket Status Changed From: %s To: %s** – the auto-close system (configured within the administrator control panel) has been triggered and has changed the status of the ticket.
- **Ticket Department Changed From: X To: Y** – the ticket has been moved to a different department.
- **Ticket Escalated under Rule: X** – a ticket escalation path has taken effect.
- **Setting Due Time To: X** – the due time of the ticket has been set.
- **SLA Plan Set To: X** – the ticket has been assigned an SLA plan.
- **Ticket Flagged To: X By: Y** – the ticket has been flagged.
- **Ticket Flag Cleared By: X** – the ticket's flag has been cleared
- **Ticket Exported as XML By: X** – the ticket has been exported in XML format by a staff user.
- **Ticket Exported as PDF By: X** – the ticket has been exported in PDF format by a staff user.
- **Ticket Due Time Set To: X By: Y** – the ticket's due time has been set.
- **Ticket Marked as Overdue By: X** – the ticket has been marked as overdue.
- **Ticket Due Time Cleared By: X** – the ticket's due time has been cleared.
- **Ticket Note Added By: X** – a ticket note has been appended to a ticket.
- **User Note Added By: X** – a user note has been appended to the user's account from within the ticket.
- **Ticket Note Deleted By: X** – a ticket note has been deleted.
- **Ticket Printed By: X** – a ticket has been exported into a printer friendly view.
- **Ticket Post Deleted By: X** – a ticket reply has been deleted.
- **Ticket Draft Cleared By: X** – draft contents of a ticket reply have been cleared.
- **Ticket Draft Saved By: X** – draft contents of a ticket reply have been saved.

- **Ticket Forwarded To: X By: Y** – the ticket and some of or all of the reply contents have been forwarded by a staff user.
- **Ticket Recipient: X Deleted By: Y** – a ticket recipient has been deleted.
- **Time Tracking Entry #X Deleted By: Y** – a time tracking or billing entry has been deleted.
- **Time Tracking Entry Added For: X By: Y (Worked: %s Billable: Z)** – time tracking or billing information has been added to the ticket.
- **Processed under Parser Rule: X** – the e-mail was received and processed under the parser rule before being processed into a new ticket.
- **Ticket Merged With #X** – ticket has been merged with another.
- **Deleted Ticket. Ticket ID: #%s, Subject: %s, Fullname: %s, Email: %s** – ticket has been deleted.

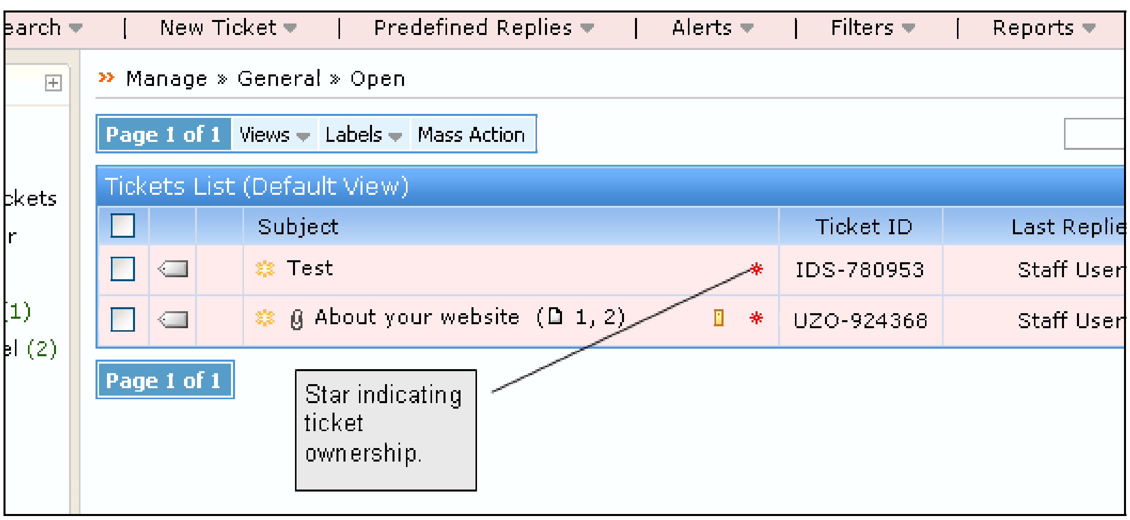
Ticket assignment and ownership

A ticket can be "**owned**" by or **assigned to** a particular staff user.

When a ticket is assigned to a staff user, only that staff user will be able to view the ticket unless the staff user explicitly chooses to view tickets not assigned to themselves (see customized ticket listing view).

When a ticket is assigned to a staff user, the staff user will receive an e-mail notification of ticket assignment.

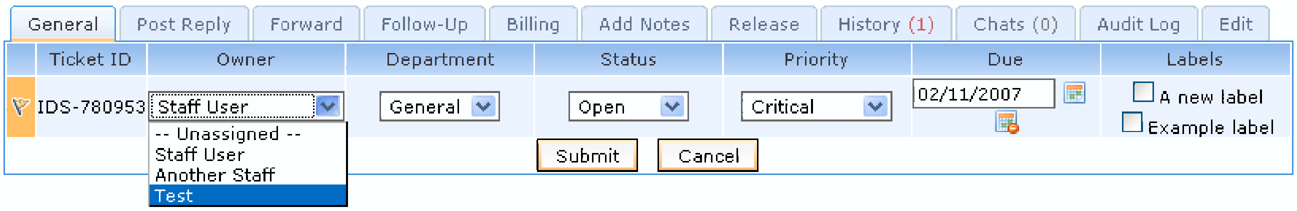
When viewing a ticket listing, tickets that are assigned to yourself will be indicated by a red star, as shown below.



Assigning a ticket

To assign a ticket from within a ticket view:

1. On the **ticket information bar**, click on **Owner** as shown below.



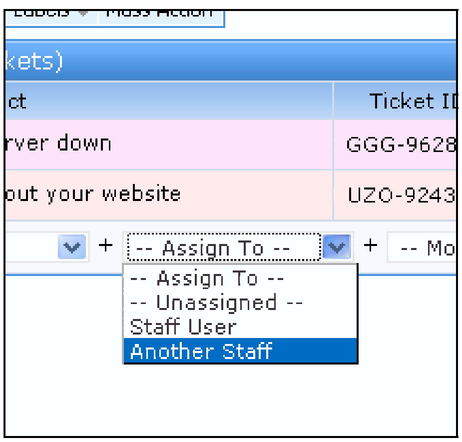
2. Select the name of the staff user to whom you wish to assign the ticket.

To assign a ticket from within a ticket listing view:

1. Select the tickets you wish to assign.

2. On the **mass-management menu bar** (as shown below), select the name of the staff user to whom you wish to assign the ticket.

3. Click on the **Submit** button to perform the setting changes.

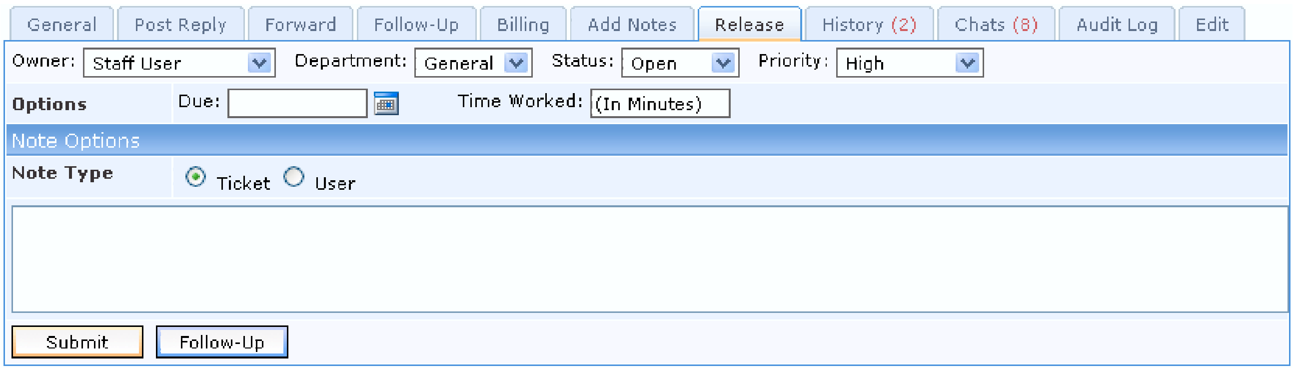


Releasing a ticket (cumulative actions made when replying)

An assigned or owned ticket can be released to another staff user or to **no one**. In one action, multiple properties of a ticket can be changed (such as status, ticket owner, ticket priority) including adding a ticket note.

To release a ticket from within a ticket view:

1. On the **ticket management menu**, click on the **Release** tab as shown below.



2. Then, do as appropriate:

    a. Select a new **Owner** (or to assign the ticket to nobody, set the owner to **– Unassigned --**).

    b. Select the ticket's **Department**.

    c. Select the ticket's **Status**.

    d. Select the ticket's **Priority**.

    e. Set a **Due time** for the ticket.

    f. Enter the amount of **Time worked** on the ticket.

    g. Attach a **Note** to the ticket or the user's account.

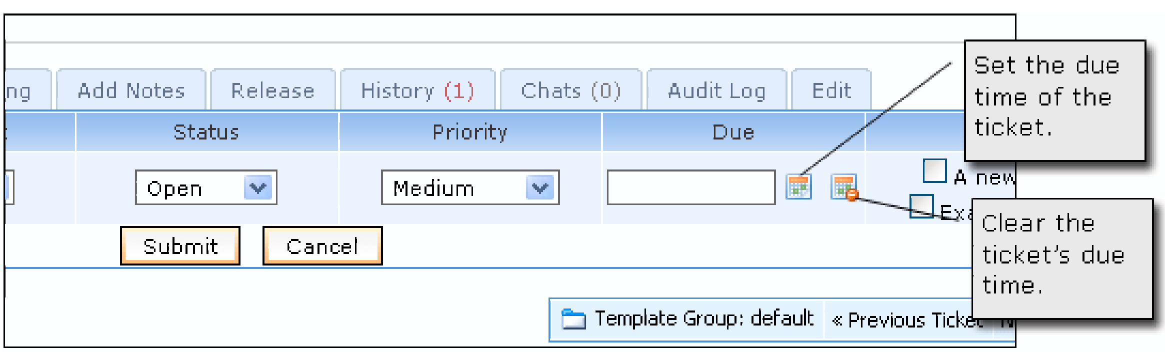
    h. Add a **Follow-up** action for the ticket.

Click on the **Submit** button to release the ticket and perform the property changes.

Ticket due times

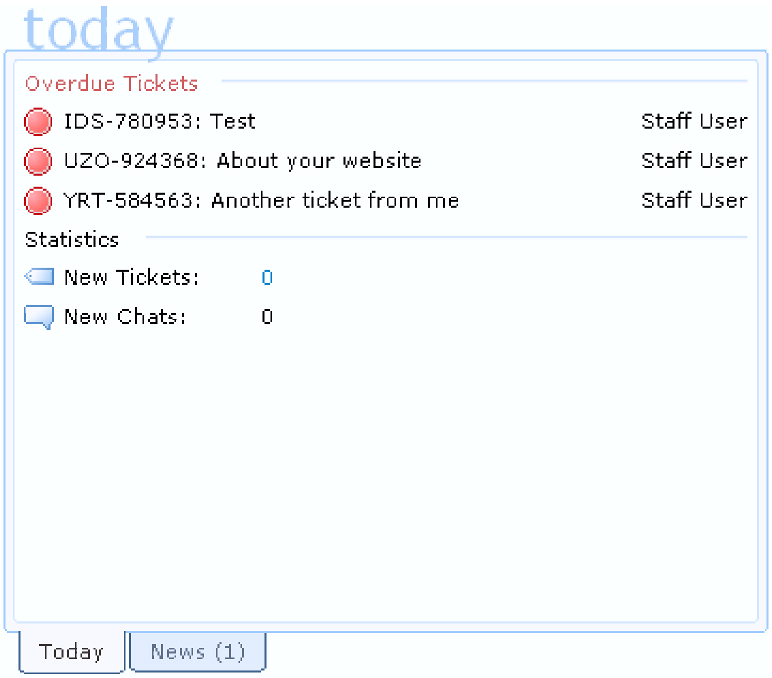
Ticket due times can be set both manually and automatically (by the system). A case where a ticket may have it's due time set automatically is if the ticket applies to a certain **SLA plan** (see SLA in the administrator control panel).

A ticket's due time can also be set manually when viewing a ticket, as shown below.



Click on the calendar icon (as shown above) to open the date selector.

When a ticket becomes **overdue** (i.e. the due time expires), the ticket will be marked as such in the ticket listing and the ticket will also appear on the **dashboard** of the **staff control panel**, as shown below.



When a ticket is overdue, a ticket's **row color** will turn a deeper shade of pink/red in a ticket listing, as shown below.

Tickets List (Default View)

			Subject	Ticket ID	Last Replier	Replies	Last Activity	Due	
			A message	IAK-723997	Staff User	2	24d6h44m	1d3h0m	
			Test	IDS-780953	Staff User	1	28d20h39m	Overdue	

Note that this color change must not be confused with a **high priority** ticket (as configured in the administrator control panel), where the color change is similar but not as deep.

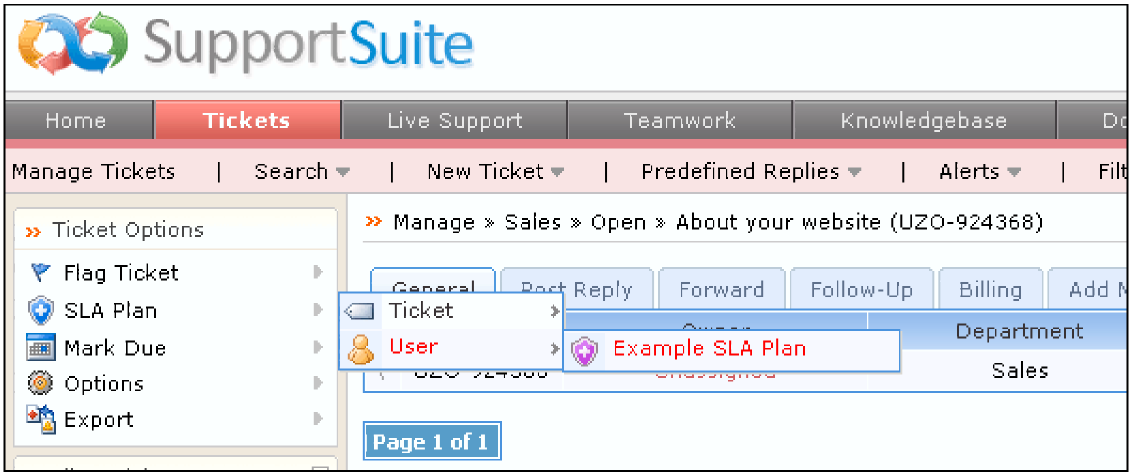
Assigning a specific ticket to an SLA plan

SLA plans can be set up to automatically apply to a department (and/or a set of statuses, priorities and so on) – see SLA in the administrator control panel..

SLA plans can also be assigned to tickets that match certain rules in the mail parser (see mail parser in the administrator control panel).

To assign a ticket to an SLA plan from within the staff control panel:

1. Open the ticket (by clicking on the ticket's name from within a ticket listing).
2. On the **Ticket Options** menu, click on **SLA**, as shown below.



3. Select the appropriate SLA plan.

The ticket's due time will not abide by the assigned SLA plan's overdue timings and schedule.

Escalated tickets

Escalation rules (if defined) come into effect when a ticket gets marked as overdue under a certain SLA plan. Escalations rules can be used to perform a set of specified actions when this event occurs – such as assigning the ticket to a staff member or moving the ticket's department.

For information on how SLA plans work, see SLA in the administrator control panel. For information on escalation rules and setting up escalation rules, see escalations rules in the administrator control panel.

An example use of escalation rules is seen in a company with a support department which is lead by two superior support managers. When a ticket turns overdue, an escalation rule can be set up to assign this ticket to one of the support managers and set the ticket's priority to **urgent**.

When a ticket is escalated, the escalated symbol will be shown on a ticket listing, as shown below.