Scheduling Tickets for Follow

Help Documentation

Scheduling Tickets For Follow-up

One method for managing tickets in SmarterTrack is by scheduling them for follow-up. For example, if an agent needs to do additional research to resolve a customer's issue, he can schedule the ticket for follow-up to ensure it is not forgotten. Similarly, follow-ups can be used to notify agents when customers haven't responded to a ticket or need additional service. When a ticket is scheduled for follow-up its status changes to "waiting." It then automaticlly becomes "active" on the scheduled day and time.

To schedule a ticket for follow-up, select the desired ticket. Then click the Actions menu in the content pane toolbar, select Follow-up and click Schedule . The follow-up options will load in a popup window. In general, the following options are available:

- Follow Up On - Use the calendar and clock icons to select the date and time the agent should follow up on the ticket. When this date/time arrive, SmarterTrack will automatically move the ticket to active status to remind the agent to follow-up. Note: If a follow-up was previously set on the ticket and gets suspended because of an interaction with the customer, the previously filled values will be filled in automatically when setting the follow-up again.
- New Group - Select the group to which the follow-up should be assigned to.
- New Agent - Select the agent to which the follow-up should be assigned to. If the follow-up does not need to be assigned to a specific agent, choose the auto-assign option and the follow-up will be assigned to an agent within the specified group based on the distribution method set by the administrator. By default, the agent who schedules the follow-up will be assigned the follow-up.
- New Priority - Select the priority of the ticket. Generally, an agent will not change the ticket priority.
- Pin Ticket - Check this box to pin the ticket to the agent responsible for the follow-up. For more information on pinning tickets, see Tickets Overview .
- Follow-up Note - Type any important information or comments regarding the follow-up into this field. Generally, follow-up notes describe actions taken and/or the reason the ticket was scheduled for follow-up.

Follow-ups and Agent Status

When an agent sets a follow-up, that follow-up stays with that agent and moves from waiting to active status at the follow-up's scheduled date and time. This occurs regardless of the agent's actual status within SmarterTrack. For example, a ticket that has a follow-up scheduled will move to an active status for an agent even if the agent it is assigned to is marked as inactive. Therefore, managers and supervisors will need to be aware of how follow-ups are utilized so that, in cases where an agent is inactive due to sickness or vacation, any follow-ups are distributed to active agents, as needed.

Finding Tickets Scheduled for Follow-up

When an agent schedules a ticket for follow-up, SmarterTrack automatically assigns a waiting status to the ticket. To view all tickets scheduled for follow-up, expand My Waiting in the navigation pane. Waiting tickets scheduled for follow up will display a grey follow-up icon. Note: When a ticket is ready for follow-up, SmarterTrack automatically moves it to active status with a red follow-up indicator. These tickets area also placed in the Follow-ups status in the Navigation Pane.

Removing a Follow-up from Tickets

To remove a follow-up assigned to a ticket, select the desired ticket. Then click the Actions menu in the content pane toolbar, select Follow-up and click Remove . The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up. Note: SmarterTrack also removes any follow-ups assigned to a ticket if the ticket status is changed to closed and locked or if the ticket is deleted.