



# Creating New Tickets

Help Documentation

## Creating New Inbound or Outbound Tickets

Agents can create both inbound and outbound tickets within the management interface. For example, if a customer calls on the phone and requests more information about a product or service, the agent can send the information in an outbound ticket that's emailed to the customer. On the other hand, an agent may need to create an incoming ticket on behalf of the customer. For example, if a customer calls in and needs to submit an issue to a specific department, the agent can create a new ticket, mark it as incoming, and fill in the message as if it were the customer sending in the request. The department's autoresponder would be sent to the customer's address (if configured), and the agents in that department can work with the customer to provide a resolution to the issue.

To create a new ticket, log in the management interface and click the New Item icon and then click Ticket . Alternatively, an agent can click on the New button in the ticket content pane. (If a specific group is selected in the navigation pane, that group will be automatically selected for the new ticket.) Regardless of the method used, a new ticket window will open that the agent will use to compose an email to the customer or to the ticketing system.

Ticket - SmarterTools

Secure | <https://portal.smartertools.com/Management/Tickets/frmTicket.aspx?popup=true&reply=true>

Send ▾ Attach Files Add ▾ ⋮

Compose Comments Attachments Time Logs Related Items Custom Fields

Brand SmarterTools ▾

Group Communications ▾ Andrea Rogers ▾  Incoming Ticket

To

Cc  Bcc

Subject

**B** *I* U A ▾ A ▾ More...

## Composing a Ticket Message

The ticket compose window contains multiple tabs for displaying related ticket information. Along with the Compose tab, which is used to compose the ticket message, tabs can be found to display related Comments, Attachments, Time Logs, Related Items and Custom Fields.

The following fields will appear in the header of the ticket:

- Brand - The primary brand the ticket should be created for.
- Group - The Group to assign the ticket to. While a Group is required, it is possible for the ticket to be auto-assigned to an agent using whatever distribution method is in place for the Group.
- Agent - The Agent who will be assigned the ticket within that Group.
- Incoming Ticket - Select this option to create an incoming ticket. For Incoming tickets, the To

and From fields are essentially reversed so that the ticket appears to be originated from the customer rather than from the support agent. Incoming tickets will send the department autoresponder to the email address entered in the From field, if enabled.

- To - The email address of the message recipient. If the agent is replying to a ticket, SmarterTrack should auto-fill this field. If the ticket will be sent to multiple people, separate email addresses with a semi-colon.
- Cc - The email address of any individuals that should receive a copy of the ticket response. If the ticket will be copied to multiple people, separate email addresses with a semi-colon.
- Bcc - The email address of any individuals that should receive a blind carbon copy of the ticket response. If the ticket will be blind carbon copied to multiple people, separate email addresses with a semi-colon.
- Subject - The subject of the message. If the agent is replying to a ticket, SmarterTrack should auto-fill this field.

Type the text of the ticket response in the large editing box below the ticket header. Agents can change the formatting using the WYSIWYG editor.

The following options are available in the toolbar of the ticket response window:

- Send - To send a ticket response, select the appropriate option: Send and Mark Active; Send and Mark Waiting; Send and Mark Closed; Send and Mark Closed and Locked; or Send and Schedule Follow-up. For more information about the different options, see [Tickets Overview](#) .
- Attach Files - Adds an attachment to the ticket response that goes to the customer.
- Add - Adds a comment, resolution, task, time log, call log or other related item to the ticket. For more information about the different options, see [Viewing Tickets](#) .
- Actions (...) - Click this button and select the appropriate option:
  - Priority - To change the priority level of a ticket, select the appropriate option. For information on the different priority levels, see [Tickets Overview](#) .
  - Pin - To change the pin status of a ticket, select the appropriate option. For more information about the different options, see [Tickets Overview](#) .
  - Insert Canned Reply - Allows the agent to choose from a list of canned responses. To choose a canned response, simply double-click the desired response and it will be automatically inserted at the beginning of the ticket response.