



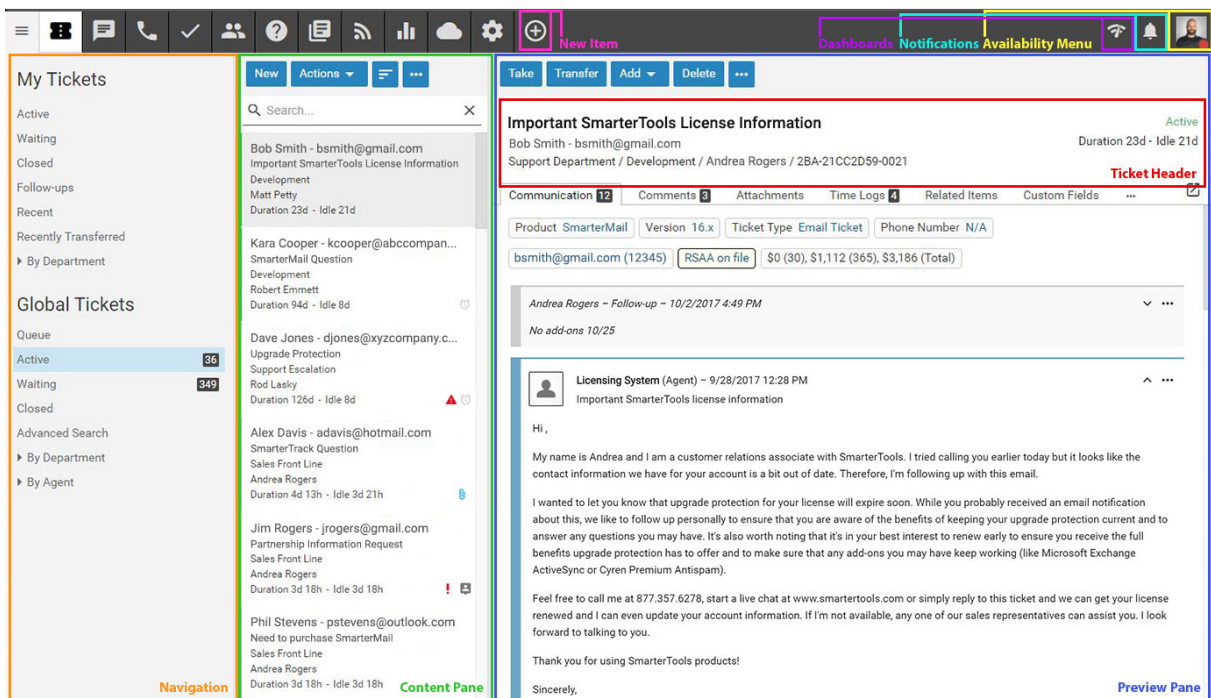
Tickets Overview

Help Documentation

Tickets Overview

SmarterTrack's ticketing feature provides businesses with a powerful information distribution system that gives agents total control of all related communications, including emails, notes, and associated live chats and call logs. To access your tickets, log into SmarterTrack as an agent and click on the Tickets icon . Standard agents will see only My Tickets, while agents with the Manager role will see both My Tickets and Global Tickets.

To better understand the different areas of the Tickets section, please refer to the diagram below.



My Tickets vs. Global Tickets

The My Tickets section of SmarterTrack organizes all of the tickets for which a particular agent is responsible. These tickets are assigned to the agent currently logged in and can be broken down into various groups, including the Active, Waiting and Closed ticket queues and ticket views for Follow-ups, Recent Tickets and Recently Transferred Tickets. The total number of tickets in the Active and Waiting queues will be displayed.

The Global Tickets section of SmarterTrack organizes all of the tickets for all departments you are part of. Administrators and managers who are members of multiple groups may want to view the tickets coming into those groups to better evaluate the actual ticket needs of the organization or to gain valuable insight into company operations. To view all tickets in SmarterTrack, an agent, manager or administrator MUST be a member of all groups within SmarterTrack. At the very least, they need to be members of multiple groups in order to see tickets and live chats for those groups. Once this is

done, they can view tickets by status, department, group or agent in the Global Tickets section of the navigation pane.

Understanding the Ticket List

Regardless of whether you're accessing My Tickets or Global Tickets, tickets in the system will load in the content pane when you click on a respective ticket section. By default, some general information about each ticket is displayed. This includes the ticket's subject, it's status, the user who submitted the ticket, its Group and its duration and idle times. It is possible to modify the "Visible Fields" that are displayed, however. To do this, simply click the Actions (...) button and select Visible Fields from the dropdown. Here, a modal window appears that allows you to add to the fields that are displayed.

In general, the following details will be displayed for each ticket in the list.

- **Status Indicator** - The current status of the ticket as indicated by the color shown along the left side of the ticket details: Green for Active, Yellow for Waiting, Grey for Closed and Grey for Closed and Locked.
- **Subject** - Similar to the subject line of an email, this is a user-generated phrase that usually describes the ticket. The subject phrase is entered by the user (customer) when the ticket is submitted. Very long subject phrases are truncated.
- **User / Email Address** - The user name and email address of the individual that submitted the ticket.
- **Group** - The group that is assigned to this ticket.
- **Agent** - The Agent the ticket is assigned to. (Generally only seen in Global Tickets.)
- **Duration** - The amount of time that has passed since the ticket was submitted.
- **Idle** - The amount of time that has passed since a ticket action has occurred.
- **Priority Indicator** - If the priority level is High or Urgent, a priority icon will be displayed.
- **Follow-up** - If a follow-up is scheduled for the ticket, a grey follow-up icon will be displayed on the Duration/Idle line. If the follow-up on a ticket is past-due, a red follow-up icon will be displayed. Note: Tickets scheduled for follow-up will appear as Waiting.
- **Pin Status** - If the ticket is pinned to the assigned agent, a grey pinned icon will be displayed on the Duration/Idle line. Pinning a ticket to an agent means that agent will always be assigned the ticket, regardless of the ticket distribution method used or the agent's Active Groups . For more information on distribution methods, see [Ticket Distribution Methods](#) .

Along with the default options, other items are available to be displayed when modifying the Visible Fields. These include:

- **Ticket Number** - The number automatically assigned to the ticket.
- **Department** - The Department the ticket was assigned to.

- Status - The status of the ticket: Active, Waiting, Closed or Closed and Locked. This is in combination with the Status Indicator that appears by default.
- Priority - The ticket's priority: Low, Normal, High or Priority. This is in combination with the Priority Indicator that appears by default.

Displaying Custom Field Data

Custom fields can be also added to the content pane ticket list by clicking on the Actions (...) button and selecting Visible Fields. Any custom field that has been assigned to a Custom Field Template can be selected to be displayed in the content pane, along with the default options.

Sorting the Ticket List

Click on the Sorting icon to modify the sorting of the tickets displayed in the content pane. Tickets can be sorted in ascending or descending order by status, priority, email address, subject, display name, brand, department, group, idle time, duration, follow-up, number of messages, agent assigned and survey results. Final sort order uses the ticket's idle time as the deciding factor. For example, 10 tickets from the same customer will sort from least idle to most idle, or vice versa.

Performing Actions on Multiple Tickets

To perform actions on multiple tickets at a time, select the tickets and click on the Actions (...) menu at the top of the content pane. In general, the following options are available:

- Select All - Selects all of the tickets in the content pane.
- Delete - Click this button to delete the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .
- Merge - Combines the contents of multiple tickets, with the ticket properties inherited from the primary ticket. For more information on merging tickets, see Merging Tickets .
- Transfer - Transfers the selected ticket(s) to another group or agent. For more information on transferring a ticket, see Transferring Tickets .
- Status - To change the status of a ticket or to pin a ticket, select the appropriate option:
 - Active - Choosing this option will mark all selected tickets as active. Generally, a ticket would be marked active when an agent is working on it.
 - Waiting - Choosing this option will mark all selected tickets as waiting. Generally, a ticket is marked as waiting when the agent is waiting for a customer reply or action. tickets marked as waiting will not appear in the active tickets section and may be set to close automatically. Note: The administrator sets the length of time a ticket will remain in waiting status before it auto-closes.
 - Closed - Choosing this option will mark all selected tickets as closed. Generally, a ticket is

marked as closed when the agent has resolved the customer's issue.

- **Closed and Locked** - Choosing this option will mark all selected tickets as closed and prohibits the customer from reopening the ticket. This option is generally used if a customer has a tendency of reopening existing tickets when new tickets should be created. Note: If the ticket message is bounced, the ticket will return to active status. For example, after responding to a ticket, an agent may mark the ticket as closed and locked. If that ticket response is undeliverable, the system will receive a non-delivery report and the ticket will revert to active status.
- **Follow-up** - To schedule or remove a follow-up for a ticket, select the appropriate option:
 - **Schedule** - Choosing this option will assign a timeframe for which the agent will follow up on the ticket. When a ticket is ready for follow up, SmarterTrack automatically moves it to active status.
 - **Remove** - Choosing this option will remove any follow-up assigned to a ticket. The ticket will be moved to the status (active, closed, or waiting) that it was in prior to being assigned a follow-up.
- **Priority** - To change the priority level of a ticket, select the appropriate option:
 - **Low** - The selected tickets have a low priority and will be sorted toward the bottom of the lists.
 - **Normal** - The selected tickets have a normal or unspecified priority level.
 - **High** - The selected tickets are a high priority and will be sorted toward the top of the lists.
 - **Urgent** - The selected tickets are very important and will show at the top of the lists.
- **Pin** - To pin or unpin the selected ticket(s), select the appropriate option. Note: Tickets cannot be pinned unless they are in an active group. Therefore, tickets in the queue cannot be pinned to an agent.
 - **Pin Ticket** - Choosing this option will ensure that the ticket will not be assigned to another agent. A pinned ticket will remain assigned to you even if you log out and hand-off your tickets. If a ticket is pinned, all correspondence relating to the ticket will be assigned to you, regardless of your status. Note: If the administrator enables automatic ticket rebalancing, pinned tickets may be reassigned.
 - **Unpin Ticket** - Choosing this option will allow the ticket to be assigned to another agent.
- **Send Form** - Allows the Agent to send a Form to the ticket originator.
- **Change Email Address** - Select this option to change the email address associated with the ticket. Agents can change the email address to better track tickets by allowing them to be found more easily when searching, sorting or browsing. When the email address associated with a ticket is changed using this control (rather than editing the To field on replies), the new email address will be automatically included for all future replies to the user. The user may adjust the

subject on their reply, however, this will not change the subject displayed in the preview pane and will only show in the header of the user's reply on the Communication tab.

- **Change Subject** - Select this option to change the subject of the ticket. Agents can change the subject to better track tickets by allowing them to be found more easily when searching, sorting or browsing. When the subject of a ticket is changed using this control (rather than editing the subject on reply), the new subject will be used for all future replies to the user. The user may still adjust the subject on their reply, however, this will not change the subject displayed in the preview pane and will only show in the header of the user's reply on the Communication tab.
- **Print** - Prints the information contained in the communication, custom fields, and details tabs of the ticket. Note: If viewing the management interface from a mobile device, this option may not be available.
- **Assistance** - Click this button and select the appropriate option to view relevant knowledge base articles or ticket resolutions or to get assistance from another agent.
- **Knowledge Base Articles** - Displays a list of knowledge base articles that may be related to the selected ticket. Agents can use search terms to find the knowledge base article that best relates to the ticket.
- **Resolved Tickets** - Displays a list of resolutions that may be related to the selected ticket. Agents can use search terms to find the resolution that best relates to the ticket.
- **Instant Message** - Allows the agent to IM another agent, supervisor or administrator that is logged into SmarterTrack.
- **Manual Events** - At the bottom of the Actions are listed any manual events an agent has created that can be performed against the selected ticket. For more information, see the Events Overview page of the online help.