



# Viewing Tickets

Help Documentation

## Viewing Tickets

Depending on your role, a list of all active tickets in the system or all active tickets to which you are assigned will load in the content pane upon login. To view the contents of a ticket, simply click the desired ticket and it will load in the preview pane. If you would rather view the ticket in a pop-up window, double-click the ticket instead.

In general, the following options are available from the preview pane toolbar:

- **Take** - This option is available if an agent is a part of a ticket group but does not have possession of the ticket. It allows an agent to "take" a ticket and make it an active issue in their queue.
- **Reply** - If the agent owns the ticket, this allows them to compose a reply to the ticket. For more information on replying to a ticket, see [Replying to Tickets](#) .
- **Reply All** - If the agent own the tickets, this allows them to compose a reply to all of the emails listed in the To field of the ticket. To access the Reply All option, click on Reply.
- **Transfer** - Transfers the ticket to another group or agent. For more information on transferring a ticket, see [Transferring Tickets](#) .
- **Add** - Click this button and select the appropriate option to add a comment, task, file, time log, call log or other related item to the ticket.
- **Comment** - Adds a note or a resolution to the ticket. When an agent adds a resolution to a ticket, this information is stored in a searchable database that can be used to quickly and efficiently resolve a ticket issue. Ticket comments and resolutions are only visible to agents and managers. Users can not see comments or resolutions.
- **Resolution** - Similar to a comment, a resolution is a finalization of the ticket that will be seen as resolved tickets (see below) when tickets of a similar nature are received.
- **Internal Attachment** - Attaches a file to the ticket that is only available to the Agents who work on the ticket. When an agent adds an internal attachment to a ticket, this information is stored in the Attachments and Communication tabs of the ticket.
- **Related Item** - Adds an existing ticket, call log or live chat to the ticket. When an agent adds a related item to a ticket, this information is stored in the Related Items tab.
- **New Task** - Attaches a new task to the ticket. When an agent adds a task to a ticket, this information is stored in the Related Items tab and appears in the Tasks section of the management interface.
- **New Time Log** - Attaches a new time log to the ticket. When an agent adds a time log to a ticket, this information is stored in the Time Logs tab.
- **New Call Log** - Attaches a new call log to the ticket. When an agent adds a call log to a ticket,

this information is stored in the Related Items tab.

- Delete - Click this button and select the appropriate option to delete tickets.
- Delete - Deletes the selected ticket(s). For more information on deleted tickets, see [Deleting Tickets](#) .
- Actions - Click this button and select the appropriate option to mark the ticket for follow-up, change the status or priority of the ticket, view user details, get assistance or print the ticket.
- Status - To change the status of a ticket or to pin a ticket, select the appropriate option. For information on the different status types, see [Tickets Overview](#) .
- Follow-up - To schedule or remove a follow-up for a ticket, select the appropriate option. For more information on follow-ups, see [Scheduling Tickets for Follow-up](#) .
- 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 pin or unpin the ticket, select the appropriate option.
- 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.

## **Tabs within the Ticket**

Ticket information is organized within the following tabs:

- Communication - This tab includes all correspondence and comments pertaining to the ticket, with the most recent communications listed first. Agents collapse or expand correspondence using the icons on the top right corner of each communication. Note: By default, only the 15 most recent items will display when an agent views the ticket. To see all communication items, click the button to view additional items at the bottom of the ticket.
- Comments - This tab displays any comments agents would like to note about the ticket or customer. Comments are only visible to agents.
- Attachments - This tab lists any files that were uploaded to the ticket by an agent or customer.
- Forms This tab displays any Forms that were sent to the ticket originator. Agents can then view the information contained within the completed Forms by opening them.
- Time Logs - This tab lists any time logs attached to the ticket.
- Related Items - This tab lists any tickets, live chats, call logs, time logs, tasks or files attached to the ticket.
- Custom Fields - This tab includes any custom fields the administrator created to help customize your company's tickets. This information can be populated by a user, an agent, or a third-party application (via the administrator).
- History - This tab summarizes any actions associated to the ticket.

## **Navigation Arrows and Message Options**

At the right side of each message within a ticket are three icons:

- Up/Down arrows - When viewing a ticket thread, clicking these will either move you up to the more recent message within that thread or down to the next message in the thread. Note: The up arrow will only display if a ticket thread consists of two or more messages.
- Actions (...) icon - Clicking this offers different options, depending on the type of message that is being viewed. Generally, these options are:
  - Show HTML - For incoming OR outgoing messages, allows you to view the pure HTML of the message. While the Preview Pane will only display information that is generated from

within SmarterTrack, and standard-format HTML messages that are sent to SmarterTrack, the Show HTML option will display non-standard HTML encoding. For example, emails that are generated from a third-party product, like a billing application, but that have a reply-to address that sends the email into SmarterTrack. While the billing application email may not display in the preview pane, it WILL display when you select the Show HTML option.

- Raw Content - Shows the complete details of the ticket in text format, including all header information. Note: Raw contents for tickets are compressed after 1 day of inactivity to reduce disk space and reduce the number of files on the server.
- Quote Email - For incoming messages only, allows you to quote a specific message within a ticket thread to send in a new outgoing message.
- Reply With Copy - For outgoing messages only, allows you to reply to a specific message within a ticket thread and copies that message in the reply.
- Forward - For incoming OR outgoing messages, allows you to forward the message contents, including attachments, in a new outgoing message.
- Resend - For outgoing messages, allows you to internally resend the message.

## Viewing the Ticket Header

Looking at the primary email ticket interface diagram , you'll see a section labeled "Ticket Header". There are several critical pieces of information contained within the ticket header as well as some actions available for a user's email address that should be discussed.

A ticket's header is laid out as follows:

- Line 1 : Ticket Subject - Status - Priority and Pin status
- Line 2 : User (User's Email Address) - Duration and Idle Time
- Line 3 : Department Assigned/Group Assigned/Agent Assigned/Ticket Number
- Surveys - If a survey has been completed for the ticket, a star rating indicator will appear on the ticket header. Agents can double-click on the rating to bring it up in a new window.

Regarding the User Email Address, in many instances you'll notice the user's email address has a dotted underline. When you click on an email address with a dotted underline, the user details will load in a pop-up window:

- User Details - User Details display a variety of data about the user. For example, the user's role in SmarterTrack, a list of any tickets started from that email address, any live chats started from that email address, any call from a user with that email address and if any custom fields are associated with the user, those are displayed as well. Also available are tabs for ticket history and customer statistics, which includes information on the number of tickets, live chats, calls and time logs over specific periods of times. Custom fields can be associated with any user, and,

if present, any agent or manager can view them by selecting "User Details" from the email address mouseover.

## Viewing Tickets in the Queue

On occasion, tickets are directed to the queue instead of directly to an agent. Generally, this happens because all agents for a group are either logged out or are not receiving tickets, the ticket limit for an agent (or for all agents) has been reached or the Round Robing ticket distribution method for agents is set to Pull From Queue. Regardless of the reason, if agents can not receive tickets then they will go directly to the ticket queue. To view tickets in the queue, expand Queue in the navigation pane and select the desired status. All tickets with the selected status will load in the content pane.

## Viewing Tickets by Status

Generally, tickets are organized into different sections depending on whether they are active, waiting for a customer response, or are closed. Agents can also review only the tickets with overdue follow-ups. To view tickets by status, click the Tickets icon, expand Global Tickets or My Tickets in the navigation pane and select the desired status. All tickets with the selected status will load in the content pane.

## Viewing Recent Tickets

To view tickets by recent activity, click the Tickets icon and expand the My Tickets folder in the navigation pane. Within the My Tickets folder, there are two sections for Recent Tickets and Recently Transferred. These sections allow agents to more easily locate tickets. The Recent Tickets view will show the 100 most recent tickets that an agent has been in contact or modified, including tickets that have been responded to, had comments added or the status changed, etc. The Recently Transferred view will show the 100 most recent tickets that have been transferred from an agent's queue, regardless of whether the agent transferred the ticket out or if an agent has Taken the ticket. Tickets within these two sections are sorted by most recent activity, with the most recent shown at the top.

## Viewing Tickets by Brand

To view tickets by brand, click the tickets icon and at the top of the navigation pane a dropdown is available. Clicking on the dropdown allows you to select a specific brand and view the tickets for that brand. Agents can then select the type of tickets they want to view (options include active, waiting, and closed tickets) for whatever department and group they're a part of. Note: Agents can only view the tickets for which they are responsible. Managers can only view the tickets for the groups/departments in which they belong.

## Viewing Tickets By Agent

To view tickets by agent, click the tickets icon, expand By Agents and click the appropriate agent in the navigation pane. All active tickets for the selected agent will load in the content pane. Managers can also expand the agent and select the type of tickets they want to view (options include active, waiting, and closed tickets). Note: The ability to view tickets by agent is only available to managers using installations with less than 500 agents. In addition, managers can only view tickets for the groups/departments in which they belong.

## Viewing Deleted Tickets

The Deleted Tickets section is a list of all tickets that have been deleted by an agent. To view deleted tickets, click the tickets icon and click the Deleted Items in the navigation pane. All deleted tickets will load in the content pane. For more information on deleted tickets, see [Deleting Tickets](#) . Note: Agents can only view the tickets for which they are responsible. Managers can only view the tickets for the groups/departments in which they belong.