



Tickets

Help Documentation

Tickets

Ticket Settings

To access this section, click the settings icon . Then expand System Settings and Tickets and click Ticket Settings in the navigation pane. The ticket settings will load in the content pane and the following tabs will be available:

Options

Use this tab to edit the following settings:

- View Ticket Requires - To specify which role is required to view tickets in the Web portal, select it from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket in Portal Requires - To specify which role is required to submit tickets from the Web portal, select it from the list. By default, this setting is set to registered users with verified email addresses.
- New Ticket From Email Requires - To specify which role is required to be able to submit tickets via email, select it from the list. By default, this setting is set to all users.
- Max Messages in Replies - The number of previous messages automatically included in the text of a ticket response. By default, ticket replies include the text of three previous messages. All replies to tickets are stored by SmarterTrack, but not all replies necessarily need to be included in each ticket response.
- Stop Idle Events After - Idle events run on tickets that sit, without activity, for a certain amount of time. However, idle events can tax SmarterTrack if there isn't an upper limit set that stops from firing after a certain amount of time, especially if more than one idle event set. Therefore, this sets the number of days after which idle waiting tickets no longer trigger event actions.
- Agent Transfer Selection To specify whether an agent can select a specific agent when transferring tickets, select the appropriate option from the list.
- Auto Save Frequency - This sets how often drafts are automatically saved as drafts when agents are typing up replies to tickets.
- Enable specific date selection for follow-ups - Checking this box will allow agents to specify the date a follow-up is due. If this option is disabled, the agent can only choose the number of days that can pass until the follow-up is due. By default, this option is enabled.
- Enable ticket idle time reset when call log is added - Checking this box will set a ticket's idle time to 0 when an agent adds a call log to the ticket, specifically affecting any idle events set on

those tickets. Tickets can go idle for any one of a number of reasons. For example, an agent replies to the ticket and is waiting for the user to reply. However, if that user calls in, a call log can be attached to the idle ticket, thereby resetting its idle time and keeping any idle events from firing until a later time. By default, this option is disabled.

- Enable transferring tickets to inactive agents - Checking this box will allow agents to transfer tickets to agents that are not actively receiving tickets. By default, this option is enabled.
- Enable transferring tickets to another instance - Checking this box will allow agents to transfer tickets to another SmarterTrack installation. This is useful for larger companies that have multiple geographic locations, each with its own SmarterTrack installation. By default, this option is disabled.
- Enable ticket response time report data to be calculated based on business hours - Checking this box will allow any response time reporting to use a department's business hours as the basis for calculations versus a full 24 hour period. That enables managers and administrators to get a better idea of how agents are performing during the business day.
- Display user comment on ticket - Agents can make comments about particular accounts or users that carry over to new tickets coming in from that user. For example, if a customer is on a particular server or requires special assistance, agents can note this in user comments so that anyone who takes a ticket from that customer sees the comment and can act accordingly.
- Disable end users' ability to close tickets - Checking this box will remove an end user's ability to close tickets on their own. Instead, they can only be closed by an agent or manager. This ensures agents are aware that the issue is resolved satisfactorily.
- Enable duplicate email check when importing tickets - Checking this box can prevent SmarterTrack from receiving a large influx of new tickets due to auto-responder loops.

Service Quality

Service quality settings are a good way to set up service levels for departments. For example, if tickets need to be replied to within a given amount of time, or if there is a limit set on how long a ticket remains open before it's resolved.

- Idle Warning After - The number of seconds an agent has not responded to a ticket. After this threshold has been reached, the agent will receive a warning notification.
- Idle Critical After - The number of seconds an agent has not responded to a ticket before the ticket becomes critical. After this threshold has been reached, the agent will receive a critical notification.
- Duration Warning After - The number of minutes, hours or days a ticket remains open before its duration sets off a warning.
- Duration Critical After - The number of minutes, hours or days a ticket remains open before its duration sets off a critical alert.

Portal

Use this tab to edit the following settings:

- Max Uploads for New Tickets - The maximum number of attachments that can be uploaded with a new ticket. By default, SmarterTrack limits new tickets to 3 attachments.
- Enable attachments when submitting tickets - Checking this box will allow users to attach files to a ticket submission. By default, this option is enabled. The types of files allowed to be uploaded are managed in General Settings .
- Enable CAPTCHA when submitting tickets - Checking this box will require users to submit a CAPTCHA before submitting a new ticket. By default, this option is disabled.
- Display tickets created through email to users in portal - Checking this box will allow customers to see the tickets they have submitted through email within the Web portal. If this option is disabled, customers will not be able to view tickets submitted by email in the portal. By default, this option is enabled.
- Display the option to send ticket list by email in portal - Checking this box will allow users to request a list of their tickets be sent to them via email. By default, this option is enabled.
- Department Selection Text - The text that displays in the portal that instructs the user to select a department when submitting a new ticket.

Email

Use this tab to edit the following settings:

- Default Encoding - To specify the encoding format, select the appropriate option from the list.
- Delete Failed Emails After - The number of days after which undelivered emails are deleted. By default, failed emails are deleted after 30 days. Note: Emails that cannot be delivered are stored in the App_Data/Spool/Failed folder.
- Reply Line Prefix - The punctuation that appears at the beginning of each line of a quoted email in a ticket reply. By default, the reply line prefix is >. Note: This option applies to plain-text emails only.

Raw Content

Use this tab to edit the following settings:

- Purge After - The number of days after which files are purged from the system. By default, raw content is purged after 30 days.
- Purge After - The maximum number of files that will be kept before the files are purged from the system. By default, the maximum number of files is 25,000. Note: SmarterTools recommends keeping this option at the default setting or lower.

- **Purge After** - The maximum amount of space available for raw content storage. If this amount of space is exceeded, the files are purged from the system. By default, the maximum amount of space is 10,000 MB.

Servers

If the administrator has enabled the ability to transfer tickets between SmarterTrack installations, this tab is used to specify which instances of SmarterTrack tickets can be transferred to/from. Note: Both installations must be running the same version of SmarterTrack in order for this feature to work properly.

Signatures

To ensure consistency among all departments and groups within the company, administrators can create custom signatures that agents will use on all ticket correspondence. Alternately, different signatures can be created for each group and/or each department, as the needs arise.

To access this section, click the settings icon . Then expand System Settings and Tickets and click Signatures in the navigation pane. A list of signatures will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple signatures. Signatures must be selected before choosing an action from the toolbar.
- **Brand** - The brand to which the signature is assigned.
- **Department** - The department to which the signature is assigned.
- **Group** - The group to which the signature is assigned.

The following options are available from the content pane toolbar:

- **New** - Creates a new signature.
- **Edit** - Allows the administrator to make changes to a signature's settings.
- **Delete** - Permanently deletes the selected signature(s).

Creating and Editing Signatures

To create a new signature, simply click **New** from the content pane. A new signature window will load in a pop-up window and the following options will be available:

- **Brand** - To assign the signature to a specific brand, select it from the list.
- **Department** - To assign the signature to a specific department, select it from the list.
- **Group** - To assign the signature to a specific group, select it from the list.

When creating new signatures, the WYSIWIG editor can be used to set font types, set colors, add links and more. In addition, variables can be used to pull information from the system to customize the signature based upon how users, department, groups, etc. are set up. The following variables are available:

- Agent Avatar [#agentavatar#] - The avatar information for each employee.
- Current Brand [#companyname#] - The brand that the agent is part of.
- Department Name [#departmentname#] - The department the agent belongs to.
- Display Name [#userdisplayname#] - The "friendly" name of the agent.
- Email Address [#useremail] - The email address of the agent.
- Username [#username#] - The username assigned to the agent.

To view a specific signature, simply double-click the signature. The signature will load in a pop-up window and the same editing options are available as when a new signature is created.

Including Custom Images

Signatures can also include custom images, such as agent photos, icons and logos, apart from the agent avatar. To include a custom image, simply use the standard HTML tag and link to an image hosted on your own server or some other hosting service such as Picasa or Flickr. One thing to note: images should be sized and placed so that they do not interfere with the other pieces of an agent's signature.

Rebalance Rules

To ensure an even workload is assigned to agents, administrators can set rebalance rules. Rebalance rules allow the system to automatically redistribute tickets among the available agents based on the parameters set by the administrator. For example, a support department with two active agents may receive a high volume of tickets that are evenly among both agents. Later that day, a third agent may login and the rebalancing rule can be set to automatically redistribute any unanswered active tickets among all three agents at that time.

NOTE: Rebalance rules are NOT meant to be a way to redistribute tickets on an hourly basis. Instead, they are intended to run twice or three times a day. For example, rebalancing tickets during shift changes or for periodic redistribution if agents are taken out of the rotation. In addition, any tickets that have been viewed by agents either by opening the ticket in a new window or by previewing the ticket in the preview pane, and therefore "held" by those agents, as well as any pinned tickets, are NOT redistributed when the rebalance rules take effect.

To access this section, click the settings icon . Then expand System Settings and Tickets and click Rebalance Rules in the navigation pane. A list of rebalance rule swill load in the content pane.

In general the following columns are available:

- Checkbox - Use these boxes to select multiple rules. Rebalance rules must be selected before choosing an action from the toolbar.
- Group - The group to which the rebalance rule applies.

The following options are available from the content pane toolbar:

- New - Creates a new rule.
- Edit - Allows the administrator to make changes to the selected rebalance rule.
- Delete - Permanently deletes the selected rule(s).

To view a specific rebalance rule, simply double-click the rule. The rebalance rule will load in the content pane and the following options will be available:

- Rule Name - The name of the rebalance rule.
- Group - The group to which the rebalance rule applies.
- Agents - The agents to which the rebalance rule applies.
- Hold After Compose - The time frame after which a submitted ticket can be reassigned to another agent. By default, this option is set to 30 minutes.
- Hold After Read - The time frame after which a ticket that has been read can be reassigned to another agent. By default, this option is set to 10 minutes.
- Hold After Assigned - The time frame after which a ticket that has been assigned to an agent can be reassigned to another agent. By default, this option is set to 20 minutes.
- Rebalance Pinned After - The time frame after which pinned tickets can be reassigned to another agent. By default, this option is set to 2 hours.
- Enabled - Check this box to reassign pinned tickets to another agent. By default, this setting is disabled.
- Execute on Interval - The time frame after which the rebalancing rule will be applied to tickets in the system. By default, this option is set to 1 hour.
- Enabled - Check this box to reassign tickets at a specific interval.
- Execute on Schedule - The times at which the rebalancing rule is applied to tickets in the system. A maximum of three times per day can be scheduled.
- Enabled - Check this box to reassign tickets at a certain time each day.
- Execute when an agent starts receiving tickets - Check this box to reassign tickets when an agent logs in and actively accepts tickets for this group.
- Execute when an agent stops receiving tickets - Check this box to reassign tickets when an agent logs out of the system and/or stops receiving tickets for this group.

Quality Control

SmarterTrack's quality control feature provides a method to ensure agents provide the required level of service to customers by allowing managers to review ticket responses as the response is sent to the customer. A practical use for this feature is when it is combined with a structured training program for new agents. Managers can review a high percentage of responses by new agents to ensure that the new agent is replying to the entire issue rather than a select subset of issues, that the spelling and grammar used are up to company standards and more. Of course, quality control can just as easily be used as part of a company's regular quality control measures. More seasoned agents may not require the same oversight as trainees, but oversight can still be administered to ensure the highest levels of customer service possible.

To access this section, click the settings icon . Then expand System Settings and Tickets and click Quality Control in the navigation pane. A list of agents for whose ticket responses are monitored will load in the content pane.

To view the quality control settings for a specific agent, simply double-click the agent. The following quality control settings will be available:

- Agent - The agent being monitored.
- Forward To - The email address to which an agent's ticket responses are forwarded.
- Frequency - The number of ticket replies copied to the manager(s). The number of copied replies is based on a ratio in which the formula is 1 ticket for every X replies where X is the number entered in this field. For example, if 5 is entered in the frequency field, 1 out of every 5 tickets will be copied to the manager.

Ticket Distribution Methods

There are two distribution methods for tickets: the default distribution and Round Robin distribution. Next, ticket distribution is set up at the group level, when adding agents to the Group Settings . Administrators select whether agents will participate in the distribution method, and whether they are part of the primary or secondary distribution group.

For information on setting distribution methods, refer to the KB article [How To Set Up the Ticket Distribution Method](#) .

Default Distribution

Also known as "cherry picking," under the default distribution method, all tickets are directed to the queue and agents must manually select the tickets they are going to respond to. This model is typically preferred by smaller companies with lower volumes of tickets. In addition, This model is used by

companies that want the absolute fastest response time and are not concerned that agents can see all available tickets. Because this relies on the agents to do their fair share (and not pick the easy tickets), proper agent training is essential for successful implementation of the cherry picking distribution method.

Administrators that choose this distribution method should note the following:

- When agents are added to a group, in order for them to cherry pick tickets, the agent's round robin option should be "Not Included (Pull from Queue)". This will add the agent to the group so that they can see tickets, take transfers and pull tickets from the group's queue, they just won't receive any new tickets automatically.
- New tickets are not assigned directly to agents. All tickets are directed to the queue and are grabbed by staff members. (Waiting and follow-up tickets are assigned as usual).
- It's recommended that managers or system administrators configure event notifications that alert agents and/or managers when tickets have been waiting in the queue too long.

Round Robin

If administrators want to have more control over how tickets are distributed and to whom, using a round robin distribution method by enabling assignment groups is the answer. For example, a company that has a sales team that works on commission may employ the basic round robin distribution method to ensure that all sales agents receive the same number of potential leads. Another example is a technical support group that consists of both veteran agents as well as new or "in training" agents. In this case, administrators would want to make sure the more senior agents receive more tickets than the newer agents, so when the group is set up and the agents are added, the more senior agents receive a high "max tickets" setting and are put in the primary round robin group whereas newer agents are given a lower max tickets number and added to the secondary group. In that way, the senior agents get all new tickets first, with the newer agents acting as the overflow.

Administrators that choose this distribution method should note the following:

- In order for the round robin distribution method to be used, at least one agent needs to have an assignment group, either primary or secondary.
- An agent is considered in receipt of a new ticket in the following cases. In each case, the ticket is counted against any Max Ticket settings for the agent:
 - An active ticket is created as an incoming or outgoing ticket and assigned directly or indirectly to him.
 - A ticket is transferred from a different user to him, and it's active.

- A new ticket is created through email or web services and is assigned to the agent.
- An existing ticket is replied to through email and it is assigned to the agent but it was assigned to someone different before.
- A ticket is created through web services and is set as active.
- Whenever an agent goes active in the group, the agent pool is interpreted as having changed. This causes the allocated ticket counts to reset back to the count of open and active tickets for each agent. This prevents people that are on vacation from getting 20 tickets when their day starts, but still allows the system to deal with agents that come in a few minutes late.
- When adding agents to a group, it IS possible to exclude specific agents from the round robin distribution. For example, managers may want to be part of a group but not received any tickets. In this case, simply set the round robin distribution for the agent to "Not Included (excluded from round robin)" when the agent is added to the group, or edit the agent as needed.
- It IS possible for agents in the secondary round robin group to be the first to receive tickets. This will occur if agents in the secondary group log in before agents in the primary group. For this reason, it's advisable that primary group agents log in first OR that agents in the secondary group have a managed ticket load using max ticket settings.

A Note on Round Robin, Agent Workload and Assignment Groups

When adding agents to a group, it's possible to set the number of max new tickets that the agent can have open at any one time in addition to the assignment group that the agent belongs to. If you set Max Tickets for all agents, regardless of their assignment group, once the max tickets limit for all agents is reached, any tickets that come into the group will go into the queue will not distribute completely; the queue will only distribute as fast as the agents work. If it is important for the queue to be empty, you will want to avoid setting a Max Tickets limit for agents and NOT let them go inactive, again, regardless of their assignment group. Removing max ticket limits will provide the most balanced distribution across a 24 hour period. The Max Tickets setting represents how many NEW tickets are distributed and sitting in the agent's active list. That means that while follow-ups and waiting tickets that become active for an agent (e.g., a reply to a waiting ticket comes in) do not follow max ticket limit, they DO affect agents receiving new tickets. This is important because it allows new work to be evenly distributed but continues to let agents to manage their existing workload.

On the other hand, for new employees, agents-in-training or in circumstances where agents log out at the end of a shift or the end of the day, it may be worthwhile to add a max tickets limit while allowing all other agents in the group to grab the remaining workload.

Rebalancing

The rebalancing method allows the system to automatically redistribute tickets to agents based on

rules set by the administrator. For example, tickets can automatically be redistributed when a new agent logs in or at specific times of the day.

Administrators that choose this distribution method should note the following:

- When an agent views a ticket, it is temporarily assigned to that agent.
- If the agent begins to write a response to the ticket, the ticket is temporarily assigned to that agent. For more information, see Rebalance Rules .