Tickets

Help Documentation

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Tickets

Tickets Overview

SmarterTrack's ticket 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. To access your tickets, click the tickets icon . Depending on the role you are assigned, only My Tickets will load or My Tickets and Global Tickets will load.

For help understanding the different areas of the tickets section, see the tickets interface diagram .

For more detail on the ticketing interface, see the View Ticket section of help.

Navigating SmarterTrack's Ticket Interface

My Tickets vs. Global Tickets

The My Tickets section of SmarterTrack organizes all of the tickets for which a particular agent is responsible. When an agent accesses My Tickets by clicking it in the navigation pane, all active tickets for the agent will load in the content pane. If there are active tickets waiting for the agent's attention, a number will be listed in parentheses next to the Active menu item. My Tickets also gives agents the ability to see any Waiting and Closed (and Closed and Locked) tickets that they have responded to.

Administrators and managers who are members of multiple groups may want to view tickets in the SmarterTrack system 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 simply click Global Tickets in the navigation pane.

Regardless of whether you're accessing My Tickets or Global Tickets, all active tickets in the system will load in the content pane when you open the respective ticket section. In general, the following columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- Status - The current status of the ticket. The status column includes:

- Whether a ticket is Active, Waiting, Closed or Closed and Locked
- The follow-up status of the ticket. Note: Tickets scheduled for follow-up will appear as Waiting.

- The priority level of the ticket - low, normal, high or urgent.
- Whether the ticket is pinned to the agent. Pinning a ticket to an agent means that agent will always be assigned the ticket, regardless of the ticket distribution method used. For more information on ticket distribution methods, see Adding Groups .
- 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.
- Email - The email address of the individual that submitted the ticket.
- Department - The department that is assigned to this ticket.
- Group - The group that is assigned to this ticket.
- Agent - The agent that is assigned to this ticket.
- Priority - The priority level of the ticket.
- Messages - The number of emails that have gone back and forth between the agent and customer.
- Idle - The amount of time that has passed since a ticket action has occurred.

Sorting

Clicking on any column header allows you to sort that column in either ascending or descending order. 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, when sorting the Email column in either ascending or descending order. In terms of the Status column, tickets sort from left to right, meaning they sort by status, then whether a follow-up is scheduled, then the ticket's priority, then whether it is pinned to an agent (or vice versa, depening on an ascending or descending sort order). Even in this scenario, however, idle time is the last item used to determine the eventual sort order.

Performing Ticket Actions

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

- New - Creates a new ticket. For more information, see Creating New Tickets .
- Actions - Click this button and select the appropriate option to transfer tickets, mark tickets for follow-up or change the status or priority of tickets. Setting options such as Status, Follow-up, Priority and Pin will display as an icon in the Status column of the content pane. Each icon will have a color assigned based on the severity level of the setting. Generally, colors denote the following:

- Grey - Low priority, no follow-up or pin.
- Green - Active status or normal priority.

• Yellow - Waiting status or follow-up scheduled but not overdue.
• Red - Closed status, high priority or follow-up past due.
• Red with Exclamation Point (Priority only) - Urgent priority.
• Red with lock (Status only) - Closed and locked.
• Blue (Pin only) - Pinned to agent.

• Select All - Selects all of the tickets in the content pane.
• 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, reglardless 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.
• View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.

• Visible Fields - This option allows you to choose which columns are displayed in the navigation pane. You are also able to set the column widths for each item that displays, allowing you to conform your content pane to fit any standard screen resolution. Each column has a default width specified, but these defaults can be modified as needed.
• Delete - Click this button to delete the selected ticket(s). For more information on deleted tickets, see Deleting Tickets .

Active Ticket Groups

Departments are broken into divisions called groups. For example, a support department may have level 1 support (less experienced support agents), level 2 support (more experienced support agents), and support management groups. Each group may have different permissions assigned to it, giving organizations the ability to assign agents within a single department varying access to information.

In addition, each agent within the group has a status of active or inactive. Active status indicates that the agent can be assigned tickets and/or live chats. An agent with an inactive status cannot be assigned tickets and/or live chats. Managers can view and edit the status of agents within each group from the Active Ticket Groups area of the tickets section of the management interface.

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 - Allows the agent to compose a reply to the ticket. For more information on replying to a ticket, see Replying to Tickets .
- Reply All - Allows the agent to compose a reply to all of the emails listed in the To field of the ticket.
- 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.
- Attachment - Attaches a file to the ticket. When an agent adds a file to a ticket, this information is stored in the Related Items and Communication tabs of the ticket.
- 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.
- 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.
- 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.
- 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.
- 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.
• 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.
• 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.
• 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 .
• 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. 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.
• 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:

• Open in New Window - Opens the entire ticket thread in a separate window. This is extremely beneficial for tablet users or for smaller desktop displays as it allows for the use of more screen real estate.
• Up arrow - When viewing a ticket thread, clicking this moves you up to the more recent message within that thread. Note: the up arrow will only display if a ticket thread consists of two or more messages.
• Down arrow - When viewing a ticket thread, clicking this moves you to the next message in a ticket thread.
• Gear 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.
• 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.

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 Number - Ticket Status - Ticket Priority
• Line 2 : User (User's Email Address) - Date/Time Ticket Submitted - Duration - Idle Time
• Line 3 : Department Assigned/Group Assigned/Agent Assigned

Regarding the User and the User Email Address, in many instances you'll notice the user's email address has a dotted underline. When you mouse over an email address with a dotted underline, a couple of options appear:

- User Details - User Details will open a pop-up window that displays 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.
- Edit Email Address - This allows you to edit the email address for future correspondence on this ticket.

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 ticket distribution method for the group is set to Cherry Picking. 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. 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 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.

Replying to Tickets

To respond to a ticket, click Reply in the preview pane toolbar. This will open a ticket response window that the agent will use to compose an email response to the customer. Alternatively, the agent may want to reply to all recipients of the ticket (those listed in the To, Cc and Bcc fields). To do so, click Reply All in the preview pane toolbar.

When replying to a ticket, SmarterTrack automatically fills in the address fields with the email address(es) of the recipient(s) from the last ticket message, the subject field with the subject from the original ticket message and the text box with the ticket correspondence thus far.

Composing a Ticket Response

The ticket response window contains all of the ticket information (communication, details, custom fields, related items and resources), plus the compose tab, which the agent will use to compose the ticket response.

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

- 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; Send and Schedule Follow-up; or Send and Transfer. For more information about the different options, see Tickets Overview .
• Save as Draft - Saves a draft of the ticket response. SmarterTrack will automatically save drafts of ticket responses, but agents can opt to save a draft of a completed response for any reason, such as pending additional information or review by a supervisor. Note: There can be only one draft per ticket. If there is a draft response for a ticket already, and another draft is created for the same ticket response, the original draft will be overwritten.
• Attach Files - Adds an attachment that is included with any response to the ticket. This is a good way to send instructional documents, screenshots, whitepapers or other files to customers and end users. In order to attach files, you will need to specify the file types allowed. More information can be found on the General Settings help page.
• Add - Adds a comment, resolution, task, time log, call log or other related item to the ticket. These items are NOT included in the ticket response, but rather are internal to the help desk and used by agents and managers. For more information about the different options, see Viewing Tickets .
• Actions - Click this button and select the appropriate option to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.

• 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 a ticket, select the appropriate option.
• 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.
• Manual Events - If any manual events were created for ticket replies, they will appear at the bottom of the Actions menu.
• Assistance - To view relevant resolutions or knowledge base articles or to get assistance

(instant message) from another agent, select the approriate option. For information on the different types of assistance, see Tickets Overview .

Transferring Tickets

On occasion, an agent may need to transfer a ticket to another agent or group. There are various reasons why a ticket may be transferred. For example, a level 1 tech support agent may need to escalate the ticket to a more experienced level 2 agent for resolution. As another example, an incorrectly categorized ticket, such as a support ticket that was incorrectly submitted as a sales ticket, may need to be rerouted to the correct department. Note: The ability to transfer tickets is determined by the role permissions. By default, agents can transfer tickets. For more information, see Roles .

To transfer a ticket, select the ticket and click the Actions menu in the content pane toolbar and click Transfer . Alternatively, you can click Transfer in the preview pane toolbar if you are viewing the ticket in the preview pane. This will open a pop-up window with the following fields:

- Instance - Select the SmarterTrack installation to which the ticket should transfer from the list. Note: This field is only available if the administrator has enabled cross-installation ticket transferring in Ticket Settings .
- Brand - The primary brand the ticket should be transferred to.
- New Group - Select the group to which the ticket should transfer from the list.
- New Agent - Select the agent to which the ticket should transfer from the list. If the ticket does not need to transfer to a specific agent, choose the auto-assign option and the ticket will be assigned to an agent within the specified group based on the distribution method set by the administrator.
- New Priority - Select the priority of the ticket. Generally, an agent will not change the ticket priority.
- New Status - Select the status of the ticket. Generally, an agent will want to mark a transferred ticket as active.
- Pin Ticket - Check this box to pin the ticket to the agent receiving the ticket. For more information on pinning tickets, see Tickets Overview .
- Transfer Note - Type any important information or comments regarding the transfer into this field. Generally, transfer notes describe actions taken and/or the reason the ticket was transferred.

Click OK to transfer the ticket. Note: When a ticket is transferred, idle time is not reset for the new agent. However, agent response time IS reset. Therefore, the new agent's initial response time if calculated based off of when they received the transfer.

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 automaticly 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.
- 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.
- 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 Global Tickets or My Tickets in the navigation pane and click Waiting . Waiting tickets scheduled for follow ups will have a yellow Follow-up icon in the Status column. Note: When a ticket is ready for follow-up, SmarterTrack automatically moves it to active status.

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.

Creating New Tickets

On occasion, an agent may need to create an outgoing ticket that is sent to the customer. For example, if a customer calls on the phone and requests information, the agent may create a ticket that includes the requested information, send it to the customer, and mark the ticket closed. This also ensures that the request is documented.

Conversely, an agent may need to create an incoming ticket on behalf of the customer. For example, if a customer calls in and is away from a computer or email client and needs an issues submitted to a specific department about an issue they're having. The agent will create a ticket as if the customer were sending it in so that it can be worked on and communication sent back to he customer with information or a potential resolution to the issue.

To create a new ticket, click the new item icon and then click Ticket . Alternatively, an agent can click on the New button in the tickets content pane. By default, the brand and the department will automatically match the group that is selected in the ticket tree. 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.

Composing a Ticket Message

The ticket response window contains all of the ticket information (communication, details, custom fields, related items and resources), plus the compose tab, which the agent will use to compose the ticket response.

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, then the agent that should receive the ticket once it gets to the appropriate group. 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.
• Incoming Ticket - Select this option will create an incoming ticket. That means that 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.
• 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 to insert a canned reply, change the status or priority of the ticket, view user details, get assistance or print the ticket.

• 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.

• Manual Events - If there are any manual events created for new ticket creation, they will appear at the bottom of the Actions menu.

Tickets in Queue

On occasion, tickets are directed to the queue instead of an agent. Generally, there are three reasons why this occurs:

• In order for a ticket to be assigned to an agent, the agent must be logged in to SmarterTrack and the agent's status must be set to receive tickets for the corresponding group. If all agents either are logged out or are not receiving tickets, the ticket will be directed to the queue.
• Administrators have the ability to set ticket limits for agents. If that limit is reached, new tickets will be sent to the queue until an agent's workload falls below the set limit. For example, to prevent a company's agent workload from getting out of hand, the administrator may set SmarterTrack to limit agents to five active tickets. Once an agent's active ticket load falls below five, the system will assign additional tickets based on the chosen distribution method.
• If a group is set with the Cherry Picking from Queue ticket distribution method, tickets will sit in the queue until selected by an agent versus being automatically assigned to an agent.

For information about how SmarterTrack assigns tickets from the queue, see Ticket Distribution Methods .

Deleting Tickets

The ability to delete a ticket is determined by the role permissions. By default, agents cannot delete tickets. For more information, see Roles .

To delete a ticket, simply select the desired ticket(s) in the content pane. Then click the Delete menu in the content pane toolbar. Alternatively, agents can delete a ticket they are currently viewing by clicking the Delete menu in the preview pane toolbar. Regardless of the method used, when an agent deletes a ticket they are presented with a confirmation dialog. Once a ticket is deleted, it is no longer available for review or action and will eventually be purged from the system. Note: Deleted items are purged from the system every 90 days. Items purged from SmartrerTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Tickets

As time passes, finding a specific ticket can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find tickets quickly and easily.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the the messages within the area of the tickets section you are viewing (i.e. active, waiting, closed, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a ticket. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

General Criteria

The following fields are available:

- Search In - This dropdown allows you to select either all ticket items EXCEPT deleted items or to only search in deleted items.
- Ticket Number - To search by ticket number, enter the ticket number in this field.
- Search String - Type the specific keywords to be queried. The body, subject, and notes sections of tickets will be searched for these keywords.
- Subject - To search by ticket subject, type the subject in this field.
- Email Address - To search by email address, enter the email address in this field.
- Customer Username - To search by username, enter the customer's username in this field.
- Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Group - To search by group, select the appropriate group from the list. Groups listed are organized by department.
- Agent - To search by agent, select the appropriate agent from the list.
- Status - To search by ticket status, select the appropriate status from the list.
- Priority - To search by priority level, select the appropriate priority level from the list.
- Sort Results - To specify whether older or newer results should be displayed first, select the appropriate item from the list.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.

Custom Fields

The administrator can create an unlimited number of custom fields, which can be used to further define search criteria. For help with custom fields, consult your administrator.

Spool

All incoming and outgoing SmarterTrack messages are processed through the spool. If your email server is down, messages in the spool will retry at regular intervals until it comes back up.

Administrators can manage incoming and outgoing messages in the spool, retry failed messages, delete failed messages, or view the raw content of any message. To manage the spool, click the tickets icon . Then expand Spool in the navigation pane and select Outgoing (for sent messages) or Incoming (for received messages).

The following options are available from the content pane toolbar:

- Retry - Retries a failed message.
- View - Allows the administrator to view the raw content of the selected message.
- Delete - Permanently deletes the message(s) from the system.
- Refresh - Refreshes the content pane.