Tickets

Help Documentation

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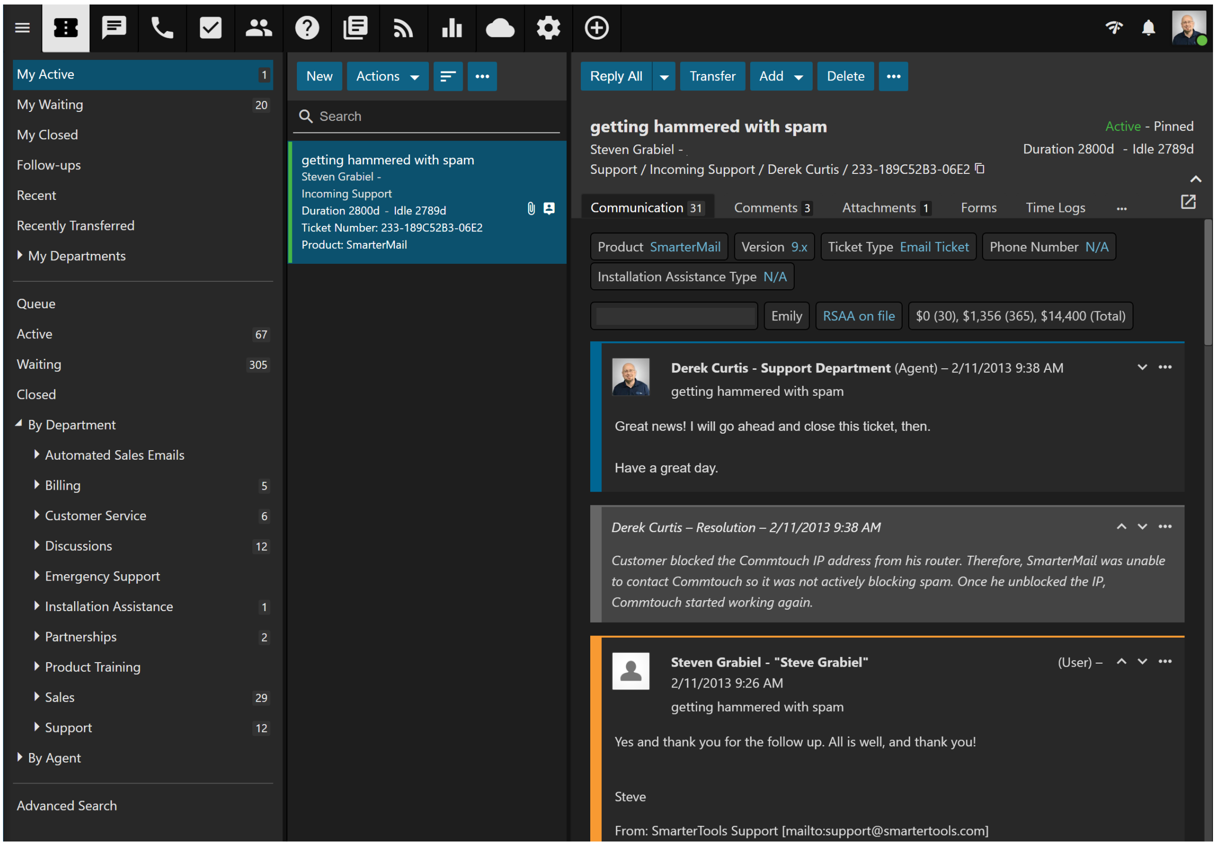
Tickets

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 only see tickets that are assigned to them. Agents with the Manager role will see their own tickets plus tickets for other agents in the Groups and/or Departments that are granted to their managerial Role.



Agent Tickets vs. Global Tickets

An agent's ticket 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 My Active, My Waiting and My Closed ticket queues and ticket views for Follow-ups, Recent Tickets and Recently Transferred Tickets. The total number of active, waiting and follow-up tickets are displayed alongside those statuses. The My Departments area further breaks down ticket status by each Deparment the agent is part of.

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 your own 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 clicke 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 displayd.

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 best used if a customer has a tendency of reopening existing tickets when new tickets should be created. However, it's also the best way to ensure that you're getting solid, reliable report data for SLA management. Re-opened tickets and artificially inflate metrics such as Idle Time, Total Reposonses, Agent Workload and more. 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.
• 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.

Ticket Distribution Methods

There are two types of distribution methods available for tickets: "Pull From Queue" and "Round Robin". Ticket distribution is set up at the group level, when adding agents to a Group . Administrators select how agents will participate in the round robin distribution method, whether they are part of the primary or secondary distribution group or not included in the automated distribution.

For more details on setting up the SmarterTrack distribution methods, refer to the KB article Ticket and Live Chat Distribution Settings .

Pull from Queue

Also known as "cherry picking", this distribution method allows agents to pick and choose the tickets they want to work on. If all agents in a group are set to Not Included (Pull from Queue), all tickets are directed to the Queue and agents must manually take the tickets they are going to respond to. This model is typically preferred by smaller companies with lower volumes of tickets. This model can also be 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, if the agent's are active in the proper ticket groups.)
- 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. In this case, 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 ticket limit and are 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 receive any tickets. In this case, simply set the round robin distribution for the agent to "Not Included (Pull from Queue)" 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 and 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:

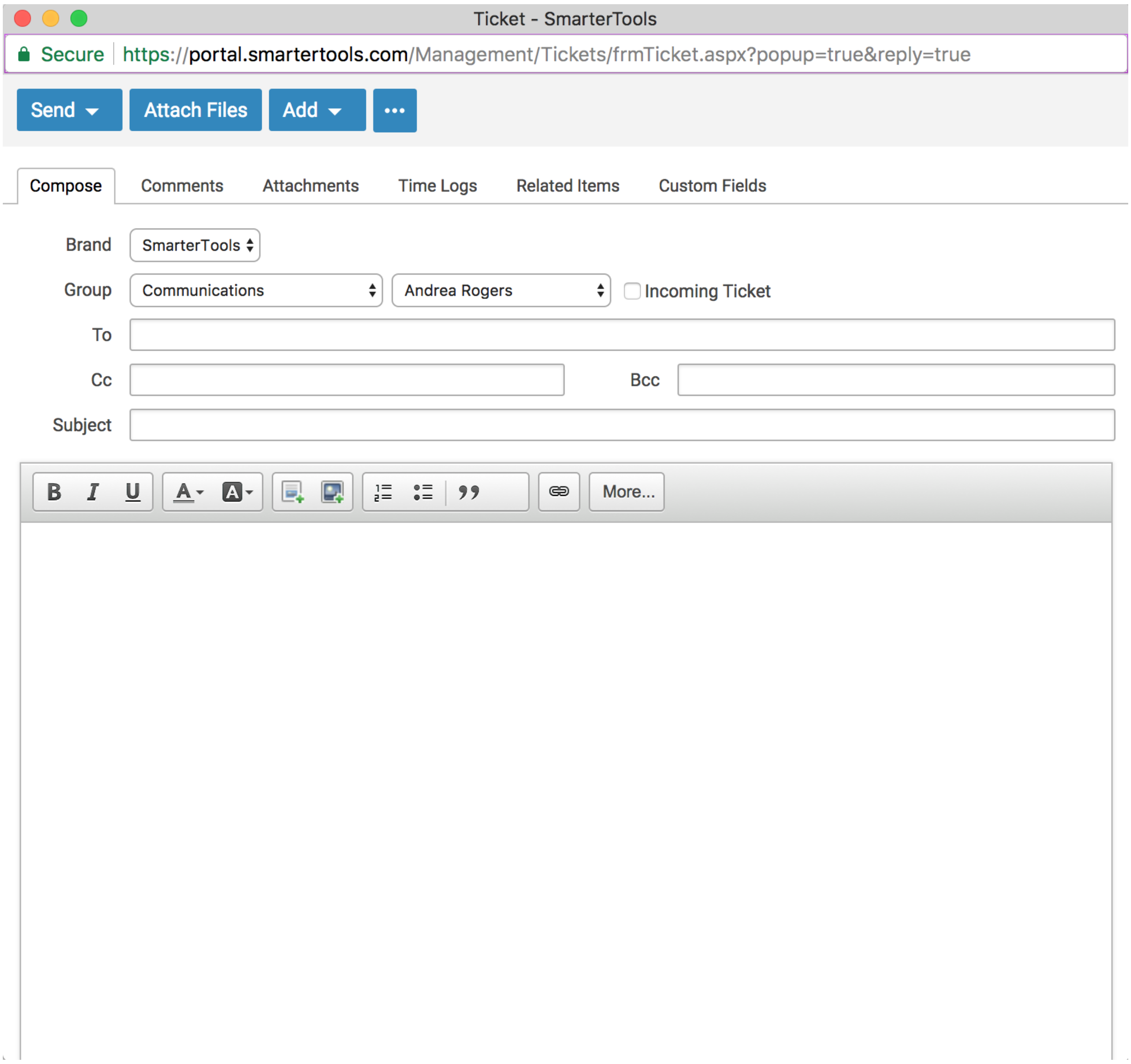
- When an agent views a ticket, it is temporarily assigned to that agent.
- If the agent begins to write a response to the ticket, the ticket is temporarily assigned to that agent. For more information, see the Rebalance Rules section of Tickets .

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.



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.

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 with in 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 and select the desired status. (My Active, My Waiting, etc.) All tickets with the selected status will load in the content pane.

Viewing Recent Tickets

To view tickets by recent activitiy, click the Tickets icon. Within an agent's tickets area there are two sections for recent tickets: Recent and Recently Transferred. These sections allow agents to more easily locate tickets. The Recent view will show the 100 most recent tickets that an agent has touched 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.

Replying to Tickets

To respond to a ticket, click Reply or Reply All in the preview pane toolbar. This will open a ticket response window that can be used to compose an email response to the user. Choosing Reply All will allow you to reply to ALL recipients of the ticket who are listed in the To, Cc and Bcc fields, while choosing Reply will reply to only the sender. (Admnistrators can choose the Default Reply Option - Reply or Reply All - in the Tickets settings .)

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. Note: When a ticket is submitted to SmarterTrack, a ticket number is automatically generated for the correspondence, and that ticket number is appended to the front of the original message's subject line. This ticket number should not be modified, moved or removed as SmarterTrack uses that number for indexing and identification processes.

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 included formatting 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.
• 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 Security help page. (NOTE: By default, the maximum file size allowed for any attachment is 2MB.)
• 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.
• 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.
• 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 the ticket, select the appropriate option.
• Insert Canned Reply - Allows the Agent to select text from a Canned Reply that will be insterted into their reply.
• Insert 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.
• 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. If no Manual Events are configured, this option will simply state "No maual events available".

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 automaticlly 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. Note: If a follow-up was previously set on the ticket and gets suspended because of an interaction with the customer, the previously filled values will be filled in automatically when setting the follow-up again.
• 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.
• New Priority - Select the priority of the ticket. Generally, an agent will not change the ticket priority.
• 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 My Waiting in the navigation pane. Waiting tickets scheduled for follow up will display a grey follow-up icon. Note: When a ticket is ready for follow-up, SmarterTrack automatically moves it to active status with a red follow-up indicator. These tickets area also placed in the Follow-ups status in the Navigation Pane.

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.

Merging Tickets

On occasion, an agent may need to combine multiple tickets into one. Merging tickets may be beneficial in a number of scenarios:

- An end user removed the ticket number from the subject of their email response, causing the reply to create a new ticket rather than append the current ticket
- An end user submits multiple, very similar tickets at once
- An end user submits the same ticket to multiple departments

To merge tickets, you’ll need to get each ticket displayed together in one window. This can be done by doing an advanced ticket search or by opening the User Details window for the user. To merge tickets from advanced search results, perform a search then checkmark the tickets that should be merged. Click the Actions menu in the content pane toolbar and click Merge. To merge tickets in the User Details window, open the User Details window by clicking on a header email address, then checkmark the tickets that should be merged and click Merge. Then, select the ticket which should become the primary ticket and have its ticket properties inherited. The primary ticket is the one that will remain after the merging is complete. All other selected tickets will have their data moved into the primary ticket, with the behaviors listed below. Note: THIS ACTION IS PERMANENT AND CANNOT BE UNDONE. Up to 10 tickets can be merged at once.

Merged tickets will have the following characteristics:

- Ticket properties, such as status, follow-ups, assigned agent, etc., all follow the primary ticket.
- Custom Fields all follow the primary ticket.
- Ticket communication items, such as replies, comments, attachments, and history, will be merged for the two tickets.
- Reports will no longer reference the old ticket, which means that timing reports may show less data than they did before the merge.
- Surveys will be merged, so the merged ticket may contain more than one survey result.
- When you merge tickets from multiple users, all users will be able to see full contents of the merged ticket.
- A forwarder is recorded, so if the customer replies back using the old ticket number, the email will be correctly recorded in the primary ticket instead.

Merging tickets works best for tickets without a lot of history to them. If you merge multiple tickets that have a lot of transfers, replies, escalations or communication items, it may be more complicated to follow the conversation or history tab when reading the new merged ticket. For items with a lot of history, use Related Items instead. Note: Though similar in nature, merging tickets is different than using the Related Items function, as merging tickets combines the data and discards the leftover tickets. Related Items, on the other hand, simply acts as pointers to other tickets, live chats or call logs that may be similar in nature or related to each other.

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. Another example is 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 Connected Services .
• New 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 Comment - 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.

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 Round Robin - Pull 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 SmarterTrack are no longer indexed and will not return as results when using Advanced Search. Any deleted tickets that have not yet been purged are marked in the database with a status of "Closed and Locked".

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.
- 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.