Helpdesk

Platform:	**1Stream CRM**
Version:	**14.0**
Application:	**Helpdesk**
Audience:	**Users**

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What is Helpdesk

Helpdesk is the interface for customers to interact with your organisation about a service request. Customers can submit tickets via telephone, email, WhatsApp, SMS or even through a form from your website. These tickets are logged and tracked to ensure customers' requests are addressed efficiently.

Navigate Tickets

Create Tickets

To manually create a ticket, do the following:

1. Click the **Create** button. The **[New Ticket]** window is displayed.
2. Enter a subject for the ticket in the text field.
3. Assign the ticket to a team by clicking the **Team** drop-down arrow and selecting a team.
4. Assign the ticket to an individual by clicking the **Assigned To** drop-down arrow and selecting a person.
5. Enter or select the customer's name in the **Contact** field.
6. Enter the customer's email address in the **Email** field.
7. Enter the customer's contact number in the **Contact** field.

   Note:
   If you select an existing customer contact, the email address and contact number automatically populate. Check to ensure the details are correct.

8. Select a reporting category, in the **Basic Details** tab by clicking the drop-down arrow next to the **Category** field.
9. Select a tag, in the **Basic Details** tab by clicking the drop-down arrow next to the **Tag** field.
10. Enter additional information, if required, in the **Ticket Notes** tab.
11. Click the **Save** button. The ticket is saved and assigned a ticket number.

Note:
You do not need to capture any information under the **Internal Metrics** tab or the **QA Assessment** tab. Internal metrics auto-populates, and a quality assessor completes the QA assessment details.

Additional Tabs

These tabs are displayed if you have permissions to create sub-tickets and tasks. Consult with your supervisor if you require these permissions.

- Sub-Tickets
- Tasks

To create a sub-ticket, do the following:

1. Select the **Sub-Tickets** tab.
2. Click **Add a line**. The **Subject** and **Team** automatically populate. You are able to change these fields, if required.
3. Update the **Subject** field, if required.
4. Update the **Team** field, if required.
5. Select a person to assign the ticket to by clicking the drop-down arrow next to the **Assigned To** field.
6. Select a contact person by clicking the drop-down arrow next to the **Contact** field.
7. Click the **Save** button.

Note:
The **State** field automatically populates as **New**.

To create a task, do the following:

1. Select the **Tasks** tab.
2. Click **Add a line**.
3. Enter a title for the task under the **Task** column.
4. Select a project by clicking the drop-down arrow next to the **Project** field.
5. Select a person to assign the ticket to by clicking the drop-down arrow next to the **Assigned to** field.
6. Select a stage by clicking the drop-down arrow next to the **Stage** field.
7. Click the **Save** button.

QA Assessment Tab

The QA Assessment tab is used to assess the quality of the ticket interaction and solution. The quality assessor will rate the interaction based on set criteria. The criteria are based on your organisation's requirements.

Interaction History

A communications window is displayed to the right of the screen or at the bottom of your screen, depending on your screen resolution. This is a record of all communications sent and interactions on the ticket. This includes communication sent externally and internally. You are able to add additional correspondence by utilising the options in the interactions history window:

- Send a message: This message is sent to the customer too and you can add templates. See **Create a Template Message**.
- Log a note: This note is for internal use only.
- Schedule an activity.
- Add an attachment.
- Follow the ticket: This adds you to the communication and updates for the ticket.

Note:
Additional details on how to use these options is contained in the **Getting Started with 1Stream CRM** document.

Create a Template Message

You are able to create templates for common responses to customers. To create template responses, do the following:

1. Click the **Send message** button. The send message window opens within the **Interaction History** window.
2. Click the **Full composer** icon ⤢. The message opens in a new window.
3. Add any additional recipients in the **Recipients** field.
4. Enter a subject in the **Subject** field.
5. Enter your message in the text box.
6. Click the **Save as new template** link. The template is added to the template list and is displayed in the **Use template** field.
7. Click the **Send** button.

To send a message using a template, do the following:

1. Click the **Send message** button. The send message window opens within the **Interaction History** window.
2. Click the **Full composer** icon ⤢. The message opens in a new window.
3. Select a template by clicking the drop-down arrow next to the **Use template** field.
4. Add any additional recipients in the **Recipients** field, if required.
5. Click the **Send** button.

Manage Tickets

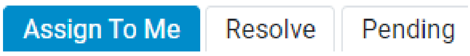
To update tickets assigned to you, do the following:

1. Click the **Tickets** menu item. A list of tickets is displayed.
2. Click the **Filters** button. A list of filters is displayed.
3. Select the **Assigned To Me** option. A list of tickets assigned to you is displayed.
4. Click the required ticket to open it.
5. Click the **Edit** button to update the ticket.
6. Amend any fields on the ticket as required.
7. Click the **Save** button.

You are able to do the following with tickets:

- Pend the ticket.
- Resolve the ticket.
- View the stage of a ticket.
- View similar tickets.
- Access a ticket conversation, if a channel is open for the ticket.
- Access the knowledge base.
- Archive tickets.
- Delete tickets.
- Create a Task.
- Assign tickets to Users.

Note:
The buttons at the top left of the page are configurable. The buttons displayed are also dependant on the level of access assigned to you.



Pend a Ticket

To pend a ticket, do the following:

1. Click the ticket you want to pend to open it.
2. Click the **Pending** button. The **Move To Pending** dialog box is displayed.
3. Select a reason to pend the ticket by clicking the **Pending Reason** drop-down arrow.

   Note:
   The **Email Template** field is automatically populated dependant on the reason selected.

4. Click the **Move to Pending** button. The ticket is placed in a pending stage and correspondence is sent to update the customer.

Note:
When a ticket is pended, the SLA is suspended.

Resolve a Ticket

To resolve a ticket, do the following:

1. Click the ticket you want to resolve.
2. Click the **Resolve** button.
3. Ensure the **Category** and **Tags** fields are correct.
4. Click the **Resolve Ticket** button. The ticket is closed and the stage updated to resolved. Correspondence is sent to the customer that their ticket is resolved.

View the Stage of a Ticket

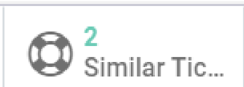
To view the stage of a ticket, do the following:

1. Click the required ticket to open it. The stage of the ticket is displayed in the top right corner of the ticket window. The current stage of the ticket is highlighted. For example, the stage of this ticket is new:

View Similar Tickets

To view similar tickets, do the following:

1. Click the **Similar Ticket** link at the top right of the ticket window. A list of similar tickets is displayed.



2. Click the required ticket to open it and view the details.

Access a Ticket Channel

Ticket channels are live chat conversations, for example, WhatsApp or Webchat.

To access a ticket discussion, do the following:

1. Click the **Conversation** link at the top right corner of the ticket window. The conversation related to that ticket is displayed.

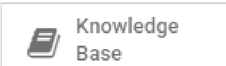
   

   Note:
   A conversation is only displayed if a channel was created for this ticket.

Access the Knowledge Base

To access the knowledge base, do the following:

1. Click the **Knowledge Base** link at the top right corner of the ticket window. The knowledge base is displayed with a list of articles.

2. Click the required article to open it.

Archive a Ticket

To archive a ticket, do the following:

1. Click the ticket in the list you want to archive. The ticket opens.
2. Click the **Action** button. A drop-down list is displayed.
3. Click **Archive**. A **Confirmation** dialog box is displayed.
4. Click the **Ok** button. The ticket is marked as archived.

To unarchive a ticket, do the following:

1. Access the **Tickets** page.
2. Click the **Filters** button. A drop-down list is displayed.
3. Select **Archived**. A list of archived tickets is displayed.
4. Click the ticket in the list you want to unarchive. The ticket opens.
5. Click the **Action** button. A drop-down list is displayed.
6. Click **Unarchive**. The ticket is unarchived, and the **Archived** marker removed.

Delete a Ticket

To delete a ticket, do the following:

1. Click the ticket in the list you want to delete. The ticket opens.
2. Click the **Action** button. A drop-down list is displayed.
3. Click **Delete**. A **Confirmation** dialog box is displayed.
4. Click the **Ok** button. The ticket is permanently deleted.

Note:
Deleting tickets is dependant on permissions. If you do not see this option and need to delete tickets consult with your supervisor.

Assign a Ticket to Users

To assign a ticket to users, do the following:

1. Click the ticket in the list you want to assign users to. The ticket opens.
2. Click the **Action** button. A drop-down list is displayed.
3. Click **Assign to Users**. The **Assign to Users** dialog box is displayed.
4. Click **Add a line**. The **Add: Assign Users** dialog box is displayed.
5. Select a user to assign to the ticket by selected the checkbox next to the required user.
6. Click the **Select** button.
7. Click the **Assign Users** button. The users are assigned.

Convert a Ticket to a Task

To convert a ticket to a task, do the following:

1. Click the ticket in the list you want to convert to a task. The ticket opens.
2. Click the **Action** button. A drop-down list is displayed.
3. Click **Convert To Task**. The **Convert To Task** dialog box is displayed.
4. Select the project by clicking the **Project** drop-down arrow.
5. Select the stage by clicking the **Stage** drop-down list.
6. Click the **Convert** button. The ticket is marked as archived and a task is created.

Create a Task

To create a task, do the following:

1. Click the ticket in the list you want to create a task for. The ticket opens.
2. Click the **Action** button. A drop-down list is displayed.
3. Click **Create Task**. The **Create Task** dialog box is displayed.
4. Enter a title for the task in the **Title** field.
5. Enter or select a project in the **Project** field.
6. Select someone to assign to the task by clicking the **Assign To** drop-down arrow.
7. Enter or select a contact person for the task by clicking the **Contact** drop-down arrow.
8. Click **Create & View Task** to create and view the task, or click **Create Task** to create the task.

   Note:
   You can view the task by accessing the **Project** application from your **Home Screen**.

Ticket Reporting

This section of the document will deal with reporting using the Helpdesk application.

To access reporting in the Helpdesk application, do the following:

1. Click the **Helpdesk** icon on your **Home Screen**. The **Tickets** page is displayed.

   Note:
   The page opens with the **Open** and **Assigned To Me** filters pre-selected. Click the **Remove** icon (**x**) to remove these filters, if required. All tickets are displayed with these filters removed.

2. Select filters for tickets you want to view by clicking the **Filters** button. A drop-down list of filters is displayed.
   For example, you may want to view all resolved tickets that were out of SLA. To do this you would select **Out of SLA** and **Resolved**.
3. Select options to group the data by, by clicking the **Group by** button.
   For example, based on the filter options selected in step 2, you may want to see the teams these tickets were assigned to. To do this you would select **Team**.
4. Add columns to the report by clicking the kebab at the top right of the report ⋮. A list of additional columns is displayed.
   For example, you may want to view all tickets that were pended. To do this click the kebab and select the **Pending Reason** checkbox from the drop-down list.
5. Select a view to display the report in. The following options are available:

   - List
   - Kanban
   - Pivot
   - Graph

Note:
- In the pivot view you have an option to add additional measures as columns. To do this click the **Measures** button. A drop-down list of additional measures is displayed. Select the measures to display.
- In the graph view you have the option to change measures. To do this click the **Measures** button. A drop-down list of additional measure is displayed. Select the measure you want to display. You can also change the type of chart view. The following options are available:

  - Bar chart
  - Line chart
  - Pie chart

You can arrange the data in the charts by descending or ascending order. To do this, click the **Ascending** or **Descending** icons.

Export Data

You are able to export data from the list and pivot view. To export data, do the following:

1. Click the **Export All** icon . An Excel spreadsheet is created and downloaded.
2. Access the downloaded file from your **Download** folder in **File Explorer**.