

Smart Answer

Operator Manual

rev. 1.0.

1. System Overview

1.1. Concepts

The Smart Answer is a web based help desk system. The program allows efficient processing of customer inquiries. Each inquiry is referred by as a *ticket*. A ticket consists of one or more *messages* arranged in chronological order. A message is very close equivalent of email letter: it has author and date attributes, contains some text and may have file attachments. Each message represents a note posted by a *customer* or a service desk representative - an *operator*.

The help desk software allows tracking of ticket status, such as whether it is new or solved, what operator owns the ticket, what department the ticket is assigned to.

The document outlines typical customer query processing workflow. It does not cover advanced topics such as system setup or customer database management procedures.

2. Ticket Processing Workflow

2.1. Ticket submission.

A customer may submit a new ticket by either sending email message to a dedicated email address or using web form. The web form is preferred method, as it allows collection of extended information (e.g. phone or order number, software version, location) and does not require publishing email address on your web site.

The picture 1 shows sample contact form. All contact forms require name, email address and at least one of the subject or problem description. The *Phone Number*, *Due Date* and *Priority* are *custom fields*.

[home](#) | [help](#) | [dashboard](#) | [my tickets](#) | [contact us](#) | [login](#)

Contact Customer Service

Note - Our help desk system allows you to track the status of submitted requests, post follow-up notes and correspond with help desk operators in a bulletin board fashion. In order to use all these benefits you need to **login** using your user id and password before submitting service requests. **Registration** is quick and free.

(this form is for new inquiries only, [click here](#) to post follow-up for a previously submitted question)

Name *

Email Address *

Phone Number

Due Date 

Priority

Access Code Copy the code:

Subject

Message (please ask only one question per form)

I am in the dark, please help.

Markup (Allows marking text as bold, italic, underline, code and inserting html links or images. [Markup help.](#))

Confidential (notification emails relating to this service request will not include message text)

Pic.1. Ticket submission form.

Upon submission, the Smart Answer assigns *Pending* status to the new ticket and shows a confirmation page (picture 2). The page provides instructions for accessing the ticket. The customer does not need to register with and login to the help desk in order to access his or her inquiries. The program generates unique access key for each ticket. Using this key a customer may access the ticket for reviewing and submission of follow-up messages. Normally there is no need to remember or enter this key, as each email generated by the help desk includes a direct link that incorporates the access code. A customer may also register (setup an account) with the site. Setting up an account allows access to a complete ticket list submitted by the customer.

[home](#) | [help](#) | [dashboard](#) | [my tickets](#) | [contact us](#) | [login](#)

New Ticket #1

Thank you for your inquiry.

We have received your message and created a service ticket #1. Please refer to this number in all follow-up communications relating to this specific issue.

Note: We have sent a confirmation email to johndoe@eastwright.com including instructions for tracking status of your ticket. If you did not receive the confirmation shortly after submission of your inquiry, there is something wrong with the email address you provided. Please be advised that if we cannot deliver a confirmation, we cannot deliver an answer as well. In an event of email delivery problems please use our online system in order to fetch an answer.

In order to access your service request via our online system, please use the following access key:

1Z18E65D9C831525BED0DEF8CCEF0E1F3F

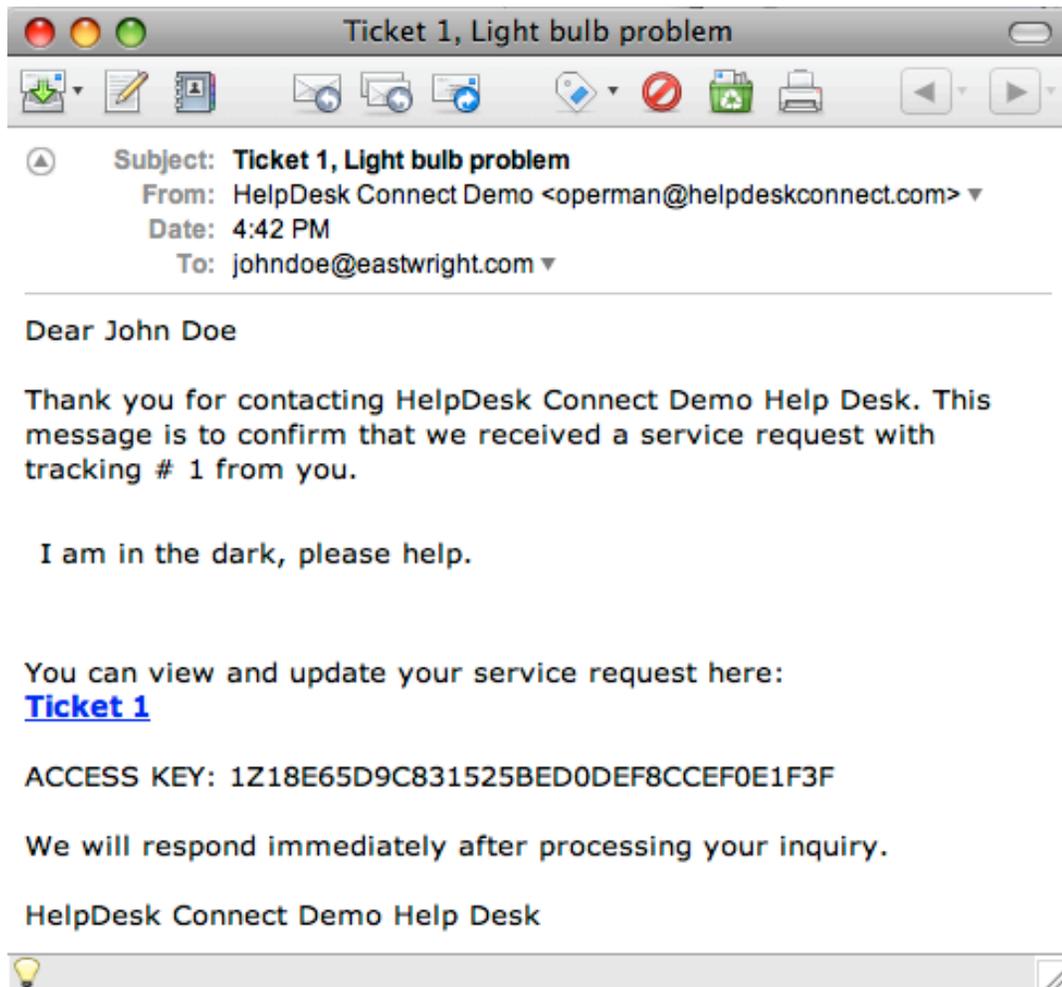
or follow this link

Ticket #1 (do not forget to bookmark it)

(both key and link have been sent to your email address johndoe@eastwright.com as well)

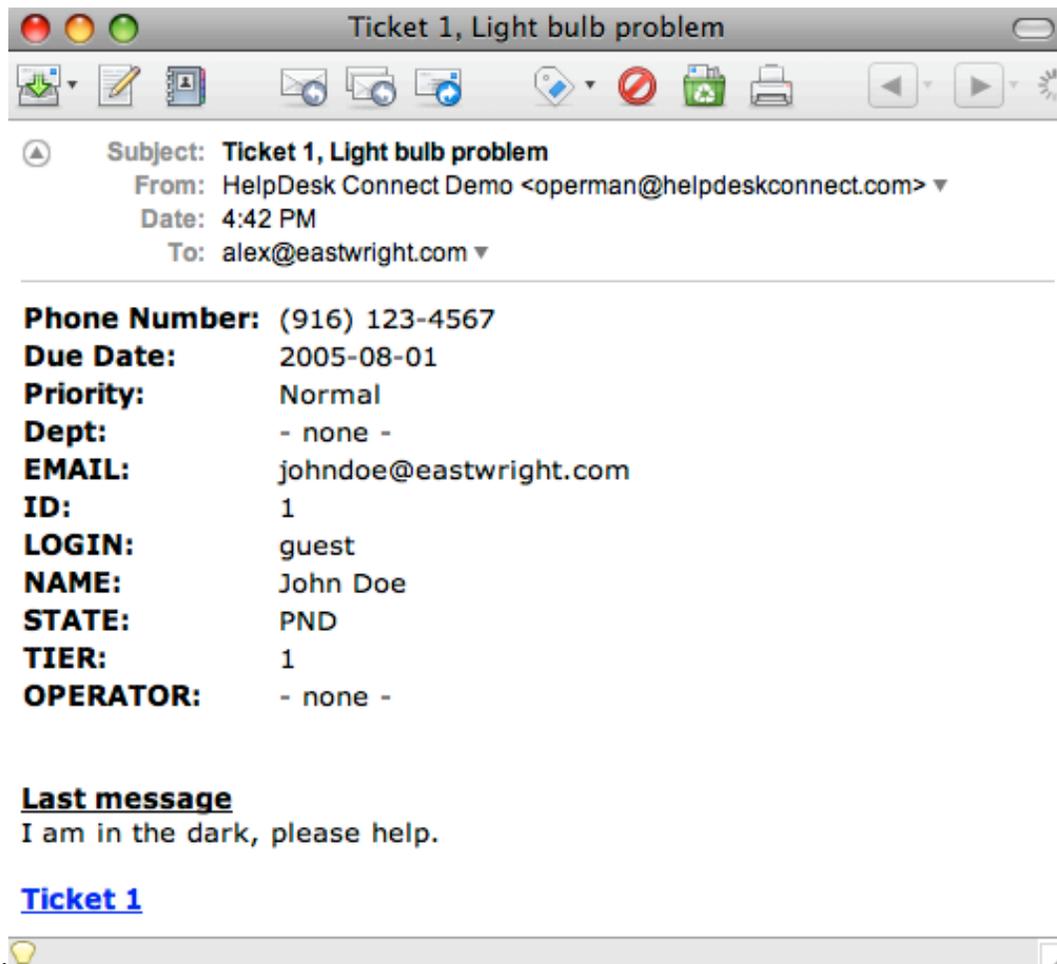
Pic.2. Confirmation page.

The Smart Answer also sends an email to the customer with a copy of submitted message and access instructions, see picture 3.



Pic.3. Customer email confirmation.

At the same time, the program notifies help desk operators about new ticket submission. Picture 4 shows sample email notification.



Pic.4. Operator email notification.

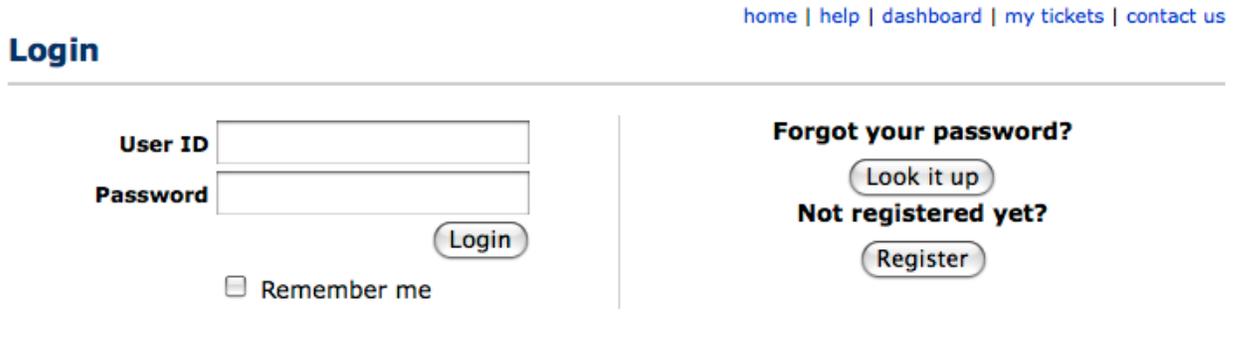
Summary: Upon a ticket submission the Smart Answer

- assigns unique ID to the ticket and appends it to the service queue;
- generates confirmation page with access instructions;
- sends confirmation email to the customer;
- issues email notifications to operators

2.2. Ticket assignment.

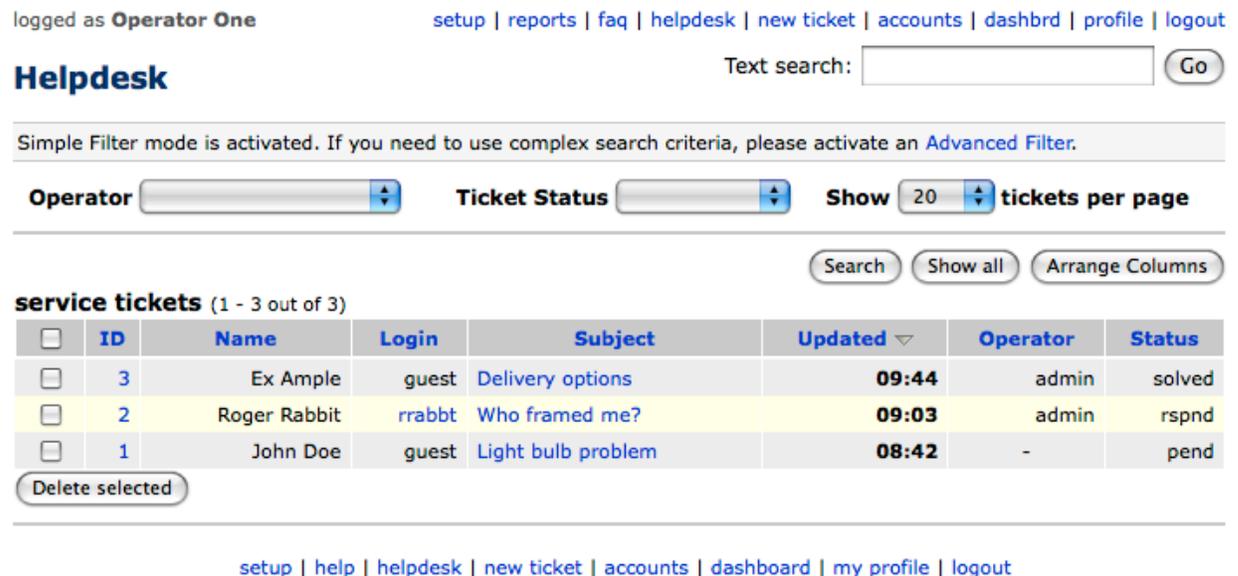
While any operator may add a message to a ticket, one of the operators must be designated as an owner of the ticket prior to any other activity. An operator must explicitly claim the ticket prior to composing an answer or transferring it to another operator or department.

To start working session an operator needs to login to help desk system. The picture 5 shows typical login page. Please contact your administrator for user ID and password.



Pic. 5. Login page.

After logging in an operator is directed to the ticket browser page. The page shows a list of tickets and provides numerous controls for navigating the list. By default, Smart Answer shows most recently updated tickets first. See picture 6 for an example of ticket browser page. Please note, that using the link provided in the new ticket notification message (picture 4) you may skip the ticket browser and proceed directly to the ticket page (picture 7).



| <input type="checkbox"/> | ID | Name | Login | Subject | Updated | Operator | Status |
|--------------------------|----|--------------|--------|--------------------|---------|----------|--------|
| <input type="checkbox"/> | 3 | Ex Ample | guest | Delivery options | 09:44 | admin | solved |
| <input type="checkbox"/> | 2 | Roger Rabbit | rrabbt | Who framed me? | 09:03 | admin | rspnd |
| <input type="checkbox"/> | 1 | John Doe | guest | Light bulb problem | 08:42 | - | pend |

Pic. 6. Ticket browser

To select a ticket from the ticket list please click the ticket's subject. The picture 7 shows the typical unclaimed ticket page. The form provides complete information about the ticket and allows either claiming or deleting the ticket. The Smart Answer ensures that only one operator may claim a ticket. An attempt to claim a ticket that is already owned by another operator will result in error message. Use *Compose an answer* link to claim a ticket.

logged as **Operator One** [setup](#) | [reports](#) | [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Ticket #1 [prev](#) [next](#)

| | | |
|---------------------|---------------------------|-----------------------------------|
| Status | Pending ? [Tier1] | |
| Account | guest (John Doe) | |
| Email | johndoe@eastwright.com | |
| Subject | Light bulb problem | Print |
| Phone Number | (916) 123-4567 | |
| Due Date | 2005-08-01 | Delete |
| Priority | Normal | Compose an answer |

| | |
|--|--------------------------------|
| guest (John Doe) 2009-02-02 08:42:41 ip:207.46.192.254 (Kirkland, WA, United States) | I am in the dark, please help. |
|--|--------------------------------|

Legend: customer operator internal

[setup](#) | [help](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashboard](#) | [my profile](#) | [logout](#)

Pic. 7. Unclaimed ticket page.

2.3. Preparing an answer.

The picture 8 shows typical ticket page. The form allows posting messages, changing ticket status and transferring ticket to another operator or group.

logged as **Operator One** [setup](#) | [reports](#) | [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Ticket #1 [prev](#) [next](#)

| | | |
|---------------------|---------------------------|--------------------------------|
| Status | Open [?] | |
| Account | guest (John Doe) | |
| Email | johndoe@eastwright.com | |
| Subject | Light bulb problem | |
| Operator | admin | Print |
| Phone Number | (916) 123-4567 | |
| Due Date | 2005-08-01 | Delete |
| Priority | Normal | Message editor |

| | |
|--|--------------------------------|
| guest (John Doe) 2009-02-02 08:42:41 ip:207.46.192.254 (Kirkland, WA, United States) | I am in the dark, please help. |
|--|--------------------------------|

Legend: customer operator internal

Message -- [answer library](#)

We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch?

- Markup** (Allows marking text as bold, italic, underline, code and inserting html links or images. [Markup help.](#))
- Confidential** (notification emails relating to this service request will not include message text)
- Internal** (The message will not be shown to a customer)
- Open** (Change ticket status to [open](#))
- Responded** (Change ticket status to [responded](#))
- Closing** (Change ticket status to [closing](#))
- Solved** (Change ticket status to [solved](#))

Transfer to --- Please select ---

Send a copy to

- Operator One
- Operator Two

Send Preview Attach files Save draft

Pic. 8. Ticket page.

Please note that ticket status now changed to *Open*. The Smart Answer is a communication tool and it tracks state of communication flow using ticket status. The *Open* status means the ticket has been assigned to an operator and the operator is preparing an answer. That is *some action is expected from the operator*.

To prepare an answer just type it in the text area and press *Add message* button. Normally you should not care about specifying ticket status, as Smart Answer will automatically update it to *Responded* (see picture 9). The *Responded* status is an indication of *some action is expected from the customer*.

logged as **Operator One** [setup](#) | [reports](#) | [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Ticket #1 [prev](#) [next](#)

| | | |
|---------------------|---------------------------|--------------------------------|
| Status | Responded [?] | |
| Account | guest (John Doe) | |
| Email | john DOE@eastwright.com | |
| Subject | Light bulb problem | |
| Operator | admin | Print |
| Phone Number | (916) 123-4567 | |
| Due Date | 2005-08-01 | Delete |
| Priority | Normal | Message editor |

| | |
|--|---|
| guest (John Doe) 2009-02-02 08:42:41 ip:207.46.192.254 (Kirkland, WA, United States) | I am in the dark, please help. |
| Operator One 2009-02-03 01:21:54 ip:17.149.160.10 (Cupertino, CA, United States) | We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch? |

Legend: customer operator internal

Message -- [answer library](#)

- Markup** (Allows marking text as bold, italic, underline, code and inserting html links or images. [Markup help.](#))
- Confidential** (notification emails relating to this service request will not include message text)
- Internal** (The message will not be shown to a customer)
- Open** (Change ticket status to [open](#))
- Responded** (Change ticket status to [responded](#))
- Closing** (Change ticket status to [closing](#))
- Solved** (Change ticket status to [solved](#))

Transfer to --- Please select --- [+](#)

Send a copy to

- Operator One
- Operator Two

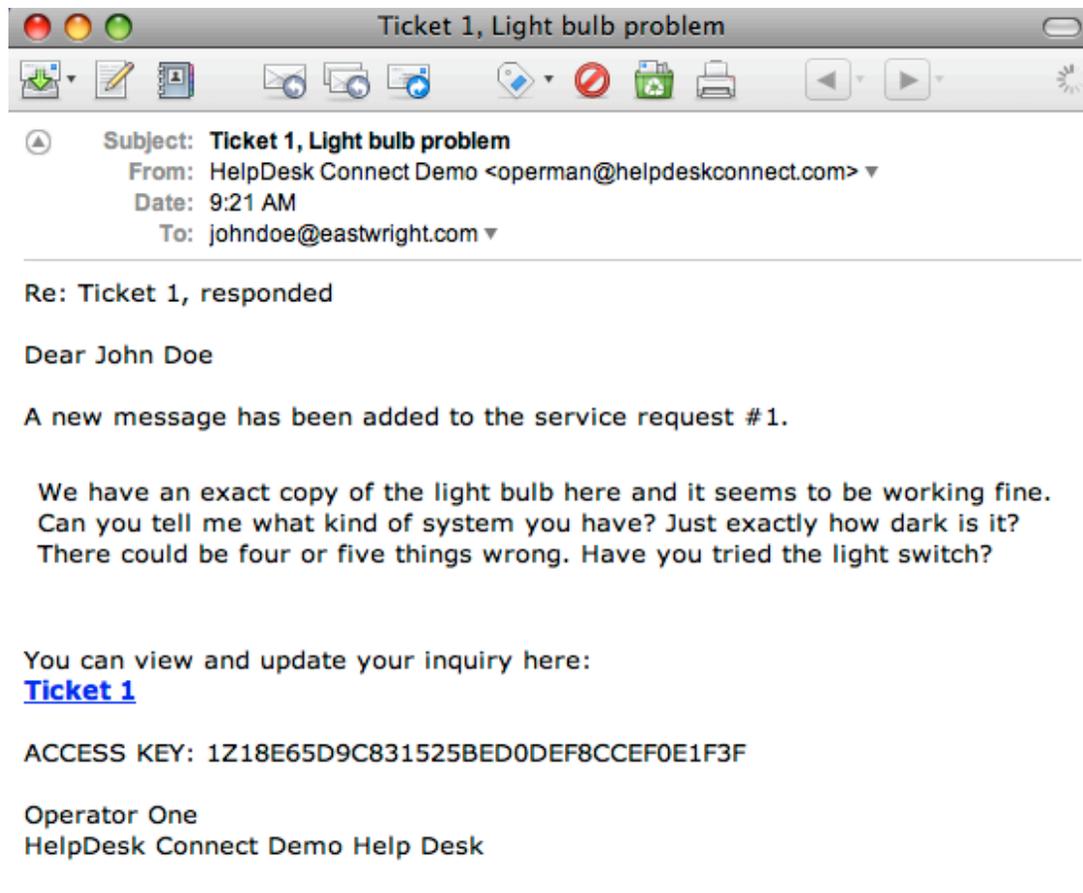
Send Preview Attach files Save draft

Pic. 9. Ticket page after submission of an answer.

Please note that Smart Answer will not send notification about the answer to operators, as it does not make sense notifying an operator about the message he or she just posted. In addition, broadcasting a conversation to the operators that are not involved into processing of the ticket does not seem to be justified in the most cases. However, if an operator that does not own the ticket posted an answer, the owner (*admin* as per the example) would get a notification email. If you want to send a copy of the message to other operators, please select the recipients from the operator list available through the “Send a copy to” section.

2.4. Submission of a follow-up message.

When an operator posts a message the Smart Answer sends an email notification to a customer (see picture 10). The email contains text of the new message and provides a link to access the ticket page. A customer may submit a follow-up message by either replying to the email just received or using web form.



Pic. 10. New message notification for a customer.

The picture 11 shows the ticket page as shown to a customer. Please note that it lacks some information and controls. The page does not show IP addresses the messages were submitted from and does not allow transferring the ticket.

Ticket #1

Status Responded [?]
Email johndoe@eastwright.com
Subject Light bulb problem
Phone Number (916) 123-4567
Due Date 2005-08-01
Priority Normal

[Print](#)
[Message editor](#)

| | |
|--|---|
| guest (John Doe) 2009-02-02 08:42:41 | I am in the dark, please help. |
| Operator One 2009-02-03 01:21:54 | We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch? |

Legend: customer operator

Message

Yes, I tried the light switch. Nothing changed. I am still in the dark.

- Markup** (Allows marking text as bold, italic, underline, code and inserting html links or images. [Markup help.](#))
- Confidential** (notification emails relating to this service request will not include message text)
- Mark as solved** (Change ticket status to [solved](#))

[Send](#) [Preview](#) [Attach files](#)

Pic. 11 Ticket page, customer posts a follow-up message.

Submission of a follow-up message results in email notification to the operator that owns the ticket. Note that Smart Answer will not send notifications to all operators. Only owner will be notified.

The system also sends an email message to the customer. The letter contains a copy of the message posted and access instructions.

2.5. Transferring a ticket.

Very often processing a ticket assumes teamwork. Other employees may be involved to provide additional information or perform specific tasks. To track the flow of processing the Smart

Answer allows changing ticket ownership or *transferring* a ticket. To transfer a ticket you need select an operator from a drop down list (labeled as “Transfer to”).

Additionally, the program supports internal messaging - if a message was marked as *Internal*, it will not be shown to a customer.

logged as **Operator One** [setup](#) | [reports](#) | [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Ticket #1 [prev](#) [next](#)

| | | |
|---------------------|---------------------------|--------------------------------|
| Status | Open [?] | |
| Account | guest (John Doe) | |
| Email | johndoe@eastwright.com | |
| Subject | Light bulb problem | |
| Operator | admin | Print |
| Phone Number | (916) 123-4567 | |
| Due Date | 2005-08-01 | Delete |
| Priority | Normal | Message editor |

| | |
|--|---|
| guest (John Doe) 2009-02-03 08:42:41 ip:207.46.192.254 (Kirkland, WA, United States) | I am in the dark, please help. |
| Operator One 2009-02-03 01:21:54 ip:17.149.160.10 (Cupertino, CA, United States) | We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch? |
| guest (John Doe) 2009-02-03 01:58:41 ip:207.46.192.254 (Kirkland, WA, United States) | Yes, I tried the light switch. Nothing changed. I am still in the dark. |

Legend: customer operator internal

Message -- [answer library](#)

Paul, could you please replace the bulb?

- Markup** (Allows marking text as bold, italic, underline, code and inserting html links or images. [Markup help.](#))
- Confidential** (notification emails relating to this service request will not include message text)
- Internal** (The message will not be shown to a customer)
- Open** (Change ticket status to [open](#))
- Responded** (Change ticket status to [responded](#))
- Closing** (Change ticket status to [closing](#))
- Solved** (Change ticket status to [solved](#))

Transfer to Operator Two ↓

Send a copy to

- Operator One
- Operator Two

Send Preview Attach files Save draft

Pic. 12. Transferring a ticket using internal communications mode.

The Smart Answer always notifies an operator when he or she has a new ticket assigned using transfer feature.

2.6. Closing a ticket.

The picture 13 shows ticket page as seen by the operator the ticket has been transferred to. Please note that

- *Operator* field now shows that user with ID *oper2* now owns the ticket;
- The color of font is blue for the last messages. By default the Smart Answer uses blue font to show internal messages.
- Status of the ticket did not change, the ticket stays *Open*, that is some action is still expected from an operator. The status did not change because the last message was internal.

Ticket #1[prev](#) [next](#)

Status Open [?]
Account guest (John Doe)
Email johndoe@eastwright.com
Subject **Light bulb problem**
Operator oper2
Phone Number (916) 123-4567
Due Date 2005-08-01
Priority Normal

[Print](#)
[Message editor](#)

| | |
|--|---|
| guest (John Doe) 2009-02-02 08:42:41 ip:207.46.192.254 (Kirkland, WA, United States) | I am in the dark, please help. |
| Operator One 2009-02-03 01:21:54 ip:17.149.160.10 (Cupertino, CA, United States) | We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch? |
| guest (John Doe) 2009-02-03 01:58:41 ip:207.46.192.254 (Kirkland, WA, United States) | Yes, I tried the light switch. Nothing changed. I am still in the dark. |
| Operator One 2009-02-03 02:07:59 ip:17.149.160.10 (Cupertino, CA, United States) | ***** Transfer from admin to oper2 ***** |
| Operator One 2009-02-03 02:07:59 ip:17.149.160.10 (Cupertino, CA, United States) | Paul, could you please replace the bulb? |

Legend: customer operator internal

Message -- [answer library](#)

The light bulb has been replaced.

- Markup** (Allows marking text as bold, italic, underline, code and inserting html links or images. [Markup help.](#))
- Confidential** (notification emails relating to this service request will not include message text)
- Internal** (The message will not be shown to a customer)
- Open** (Change ticket status to [open](#))
- Responded** (Change ticket status to [responded](#))
- Closing** (Change ticket status to [closing](#))
- Solved** (Change ticket status to [solved](#))

Transfer to

Send a copy to

- Operator One
- Operator Two

Pic. 13 Second operator is closing the ticket.

By default, Smart Answer would change ticket status to *Responded* after non-internal message posted by an operator. In order to close the ticket an operator must explicitly specify new status.

The closed ticket page is shown on pictures 14 (operator view) and 15 (customer view). Please note that

- Ticket status changed to *Solved*
- Customer page does not include internal message
- Customer page does not allow re-opening a ticket. Although the page still includes message box, any message posted will open a new ticket.

logged as **Operator Two** [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Ticket #1 [prev](#) [next](#)

| | | |
|---------------------|---------------------------|------------------------|
| Status | Solved [?] | |
| Account | guest (John Doe) | |
| Email | johndoe@eastwright.com | |
| Subject | Light bulb problem | |
| Operator | oper2 | |
| Phone Number | (916) 123-4567 | |
| Due Date | 2005-08-01 | Print |
| Priority | Normal | Reopen |

| | |
|--|---|
| guest (John Doe) 2009-02-02 08:42:41 ip:207.46.192.254 (Kirkland, WA, United States) | I am in the dark, please help. |
| Operator One 2009-02-03 01:21:54 ip:17.149.160.10 (Cupertino, CA, United States) | We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch? |
| guest (John Doe) 2009-02-03 01:58:41 ip:207.46.192.254 (Kirkland, WA, United States) | Yes, I tried the light switch. Nothing changed. I am still in the dark. |
| Operator One 2009-02-03 02:07:59 ip:17.149.160.10 (Cupertino, CA, United States) | ***** Transfer from admin to oper2 ***** |
| Operator One 2009-02-03 02:07:59 ip:17.149.160.10 (Cupertino, CA, United States) | Paul, could you please replace the bulb? |
| Operator Two 2009-02-03 04:22:30 ip:207.46.192.254 (Kirkland, WA, United States) | The light bulb has been replaced. |

Legend: customer operator internal

Pic.14. Closed ticket, an operator view.

Ticket #1

Status Solved [?]
Email johndoe@eastwright.com
Subject Light bulb problem
Phone Number (916) 123-4567
Due Date 2005-08-01
Priority Normal

[Print](#)

| | |
|--|---|
| guest (John Doe) 2009-02-02 08:42:41 | I am in the dark, please help. |
| Operator One 2009-02-03 01:21:54 | We have an exact copy of the light bulb here and it seems to be working fine. Can you tell me what kind of system you have? Just exactly how dark is it? There could be four or five things wrong. Have you tried the light switch? |
| guest (John Doe) 2009-02-03 01:58:41 | Yes, I tried the light switch. Nothing changed. I am still in the dark. |
| Operator Two 2009-02-03 04:22:30 | The light bulb has been replaced. |

Legend: customer operator

Pic.15. Closed ticket, customer view.

3. Using ticket browser

The ticket browser shows a list of tickets and provides numerous controls for navigating the list. The picture 16 shows typical ticket browser page.

logged as **Operator One** [setup](#) | [reports](#) | [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Helpdesk Text search:

Simple Filter mode is activated. If you need to use complex search criteria, please activate an [Advanced Filter](#).

Operator **Ticket Status** **Show** **tickets per page**

service tickets (1 - 4 out of 4)

| <input type="checkbox"/> | ID | Name | Login | Subject | Updated ▾ | Operator | Status |
|--------------------------|----|--------------|--------|--------------------------------|--------------|----------|--------|
| <input type="checkbox"/> | 4 | Morpher | guest | Do you want to know the truth? | 04:33 | - | pend |
| <input type="checkbox"/> | 3 | Ex Ample | guest | Delivery options | 04:32 | admin | open |
| <input type="checkbox"/> | 1 | John Doe | guest | Light bulb problem | 04:22 | oper2 | solved |
| <input type="checkbox"/> | 2 | Roger Rabbit | rrabbt | Who framed me? | 02-Feb 09:03 | admin | rspnd |

Pic.16. Ticket Browser, Simple Filter mode

3.1 Sorting tickets

By default the ticket browser sorts tickets by the update date, most recently updated tickets on the top. Note that the active column is shown in bold typeface. You may use any column for sorting tickets, just click on the column header. Any subsequent click toggles sort order. The picture 17 shows result of clicking twice on the *name* column header (first click sets ascending sort order, the second one toggles it).

The screenshot shows the Ticket Browser interface. At the top, it says "logged as Operator One" and has navigation links: "setup | reports | faq | helpdesk | new ticket | accounts | dashbrd | profile | logout". Below this is the "Helpdesk" header and a "Text search:" box with a "Go" button. A message states: "Simple Filter mode is activated. If you need to use complex search criteria, please activate an [Advanced Filter](#)." Below the message are filters for "Operator" and "Ticket Status", and a "Show 20 tickets per page" dropdown. At the bottom of the filter area are "Search", "Show all", and "Arrange Columns" buttons. The main content is a table of "service tickets (1 - 4 out of 4)". The table has columns: ID, Name, Login, Subject, Updated, Operator, and Status. The "Name" column is bolded, indicating it is the current sort order. The tickets are sorted by name in descending order: Ex Ample, John Doe, Morpher, and Roger Rabbit. A "Delete selected" button is located below the table.

| <input type="checkbox"/> | ID | Name <small>▲</small> | Login | Subject | Updated | Operator | Status |
|--------------------------|----|-----------------------|--------|--------------------------------|--------------|----------|--------|
| <input type="checkbox"/> | 3 | Ex Ample | guest | Delivery options | 04:32 | admin | open |
| <input type="checkbox"/> | 1 | John Doe | guest | Light bulb problem | 04:22 | oper2 | solved |
| <input type="checkbox"/> | 4 | Morpher | guest | Do you want to know the truth? | 04:33 | - | pend |
| <input type="checkbox"/> | 2 | Roger Rabbit | rrabbt | Who framed me? | 02-Feb 09:03 | admin | rspnd |

Pic 17. Ticket Browser, Sort by name, descending.

3.2 Text search

Smart Answer allows searching messages that contain specific text. To perform the search, just enter the words or phrase into the Text search box and click *Go* button. The picture 18 shows result of searching messages that contain phrase *light bulb*.

In order to search for an exact phrase use double quotes. Example: "*light bulb*". Entering *light bulb* without quotes would result in a search for the tickets that contain both words *light* and *bulb* in no particular order.

Search Results 1 - 2 out of 2

Search quick tips: Search terms are not case sensitive: "White House", "white house", "WHITE HOUSE" will produce the same results.

white house - Will find all help topics containing words "white" AND "house" in no particular order.

"white house" - Will find all help topics containing phrase "white house".

"white house" george - Will find all help topics containing word "george" AND phrase "white house" in no particular order.

Ticket #1, message added 03-Feb-2009
 ... an exact copy of the **light bulb** here and it seems to ...

Ticket #1, message added 03-Feb-2009
 The **light bulb** has been replaced.

Pic. 18. Full text search.

3.3. Advanced search conditions.

You may combine multiple search filters. Smart Answer uses logical AND operation to combine search conditions. In other words, the final set of tickets is a result of applying all search conditions. The Picture 19 shows an example of searching high priority tickets that are not solved yet (that is status is anything but *Solved*).

logged as Operator One
[setup](#) | [reports](#) | [faq](#) | [helpdesk](#) | [new ticket](#) | [accounts](#) | [dashbrd](#) | [profile](#) | [logout](#)

Helpdesk

Text search:

Advanced Filter mode is activated. If you do not need to use complex search criteria at the moment, please feel free to enable [Simple Filter](#).

Tickets from to

Created After

Customer ID

Customer Email

Customer Name

Due Date

Show tickets per page

Created Before

Operator

Ticket Status

Phone Number

Priority

service tickets (1 - 2 out of 2)

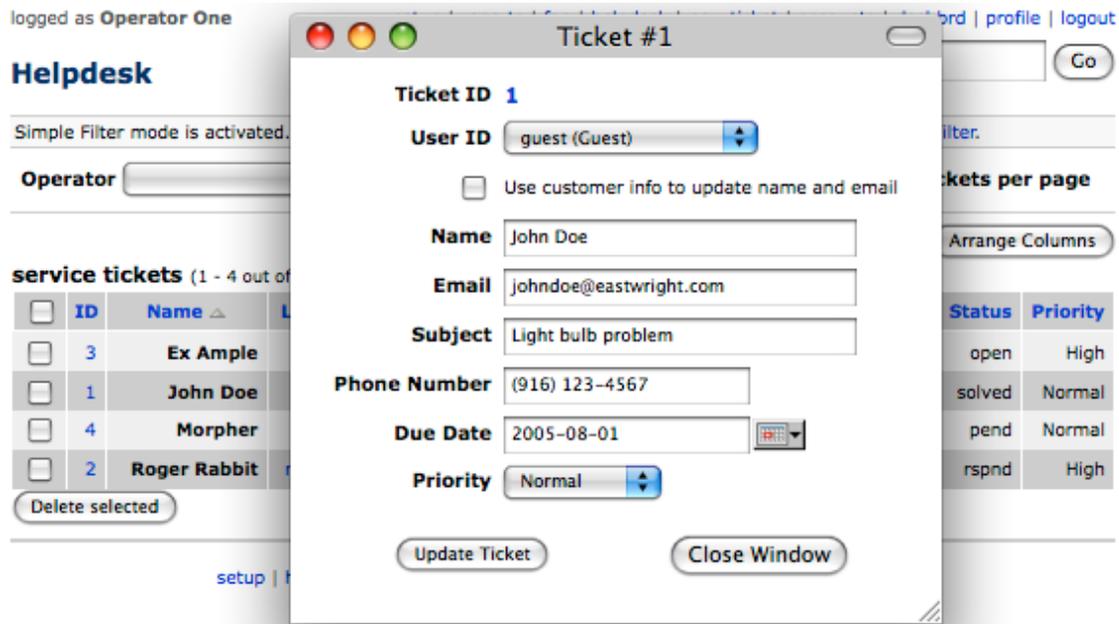
| <input type="checkbox"/> | ID | Name ▲ | Login | Subject | Updated | Operator | Status | Priority |
|--------------------------|----|---|--------|------------------|--------------|----------|--------|----------|
| <input type="checkbox"/> | 3 | Ex Ample | guest | Delivery options | 04:32 | admin | open | High |
| <input type="checkbox"/> | 2 | Roger Rabbit | rrabbt | Who framed me? | 02-Feb 09:03 | admin | rspnd | High |

Pic.19. Ticket Browser, Searching high priority tickets that are not solved yet.

19

3.4. Ticket properties

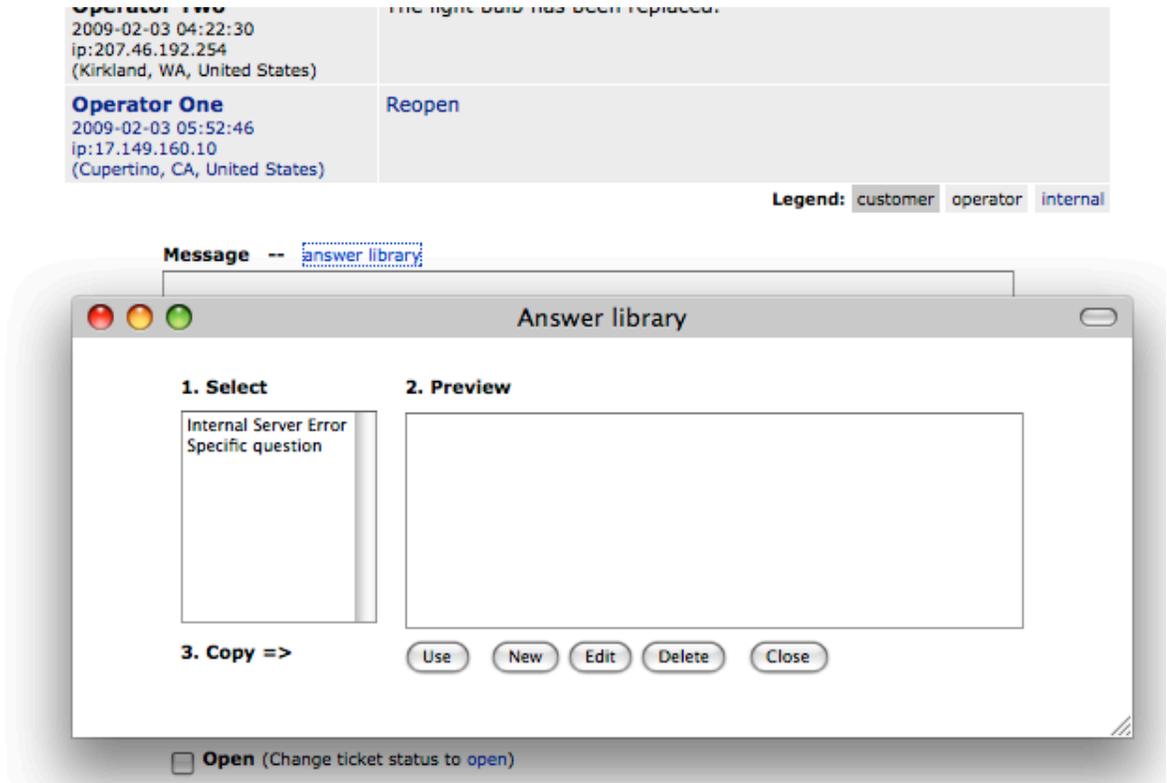
While in Ticket Browser, you may activate ticket properties inspector. It shows in a pop-up window and allows changing customer email address, name, ticket subject and any of the custom fields that your administrator marked as editable. To activate the editor please click on the ticket ID. The picture 20 shows result of clicking the ticket #1.



Pic.20. Ticket inspector window.

4. Using Answer Library.

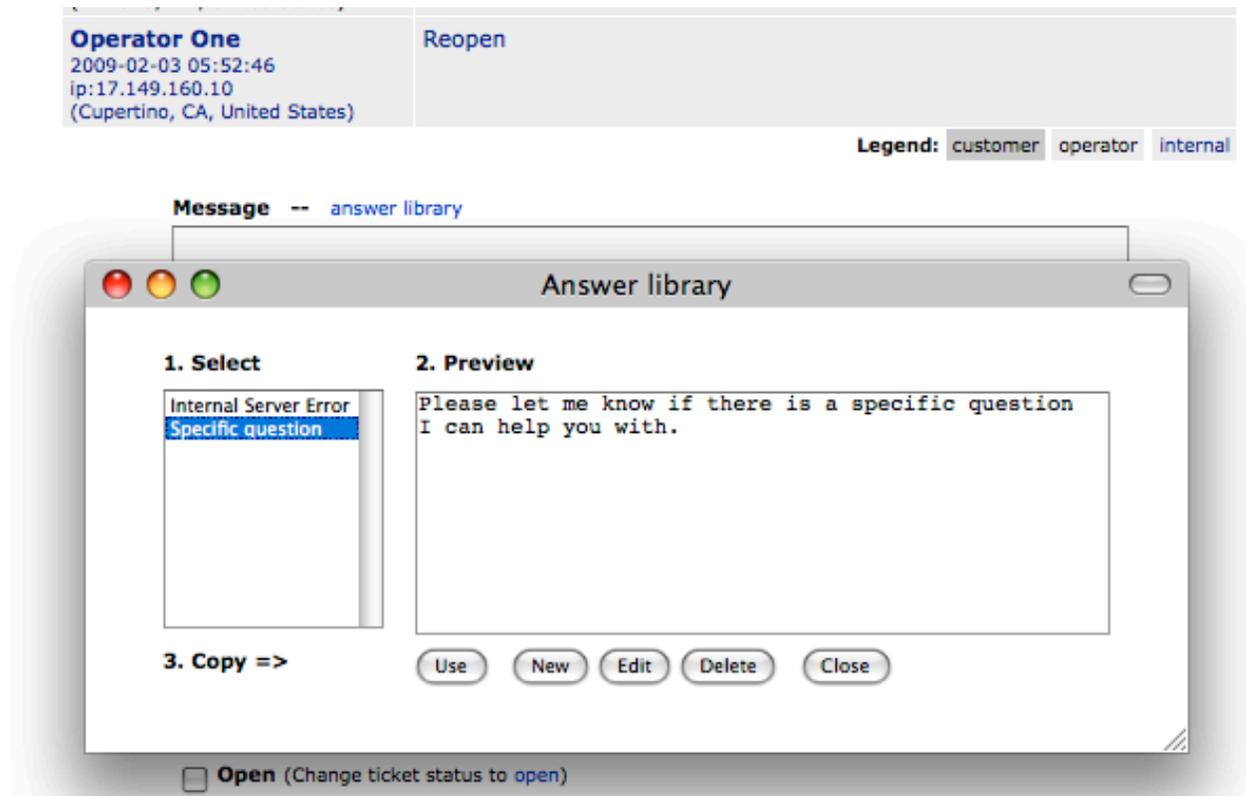
The Answer Library allows organizing answers to common questions. The link to the Answer Library is shown above the message editor box. Clicking on the link will bring the Answer Library pop-up window as shown on the picture 21.



Pic. 21. Activating Answer Library.

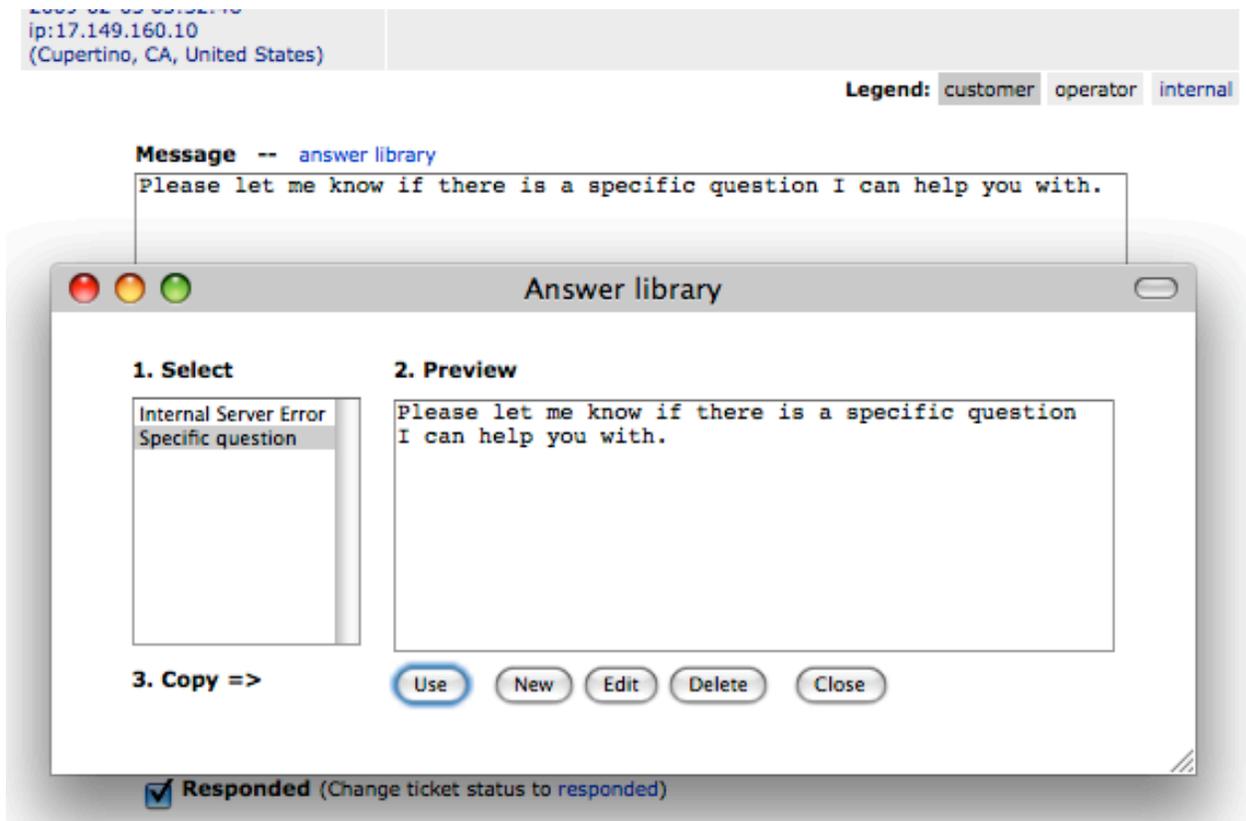
4.1. Using an answer template.

To select an answer click on the question title. Doing this will show the template in the preview box. The picture 22 shows the *Specific question* template selected.



Pic.22. Answer Library. Selecting an answer template.

In order to append the answer template to the message click *Use* button. See picture 23.

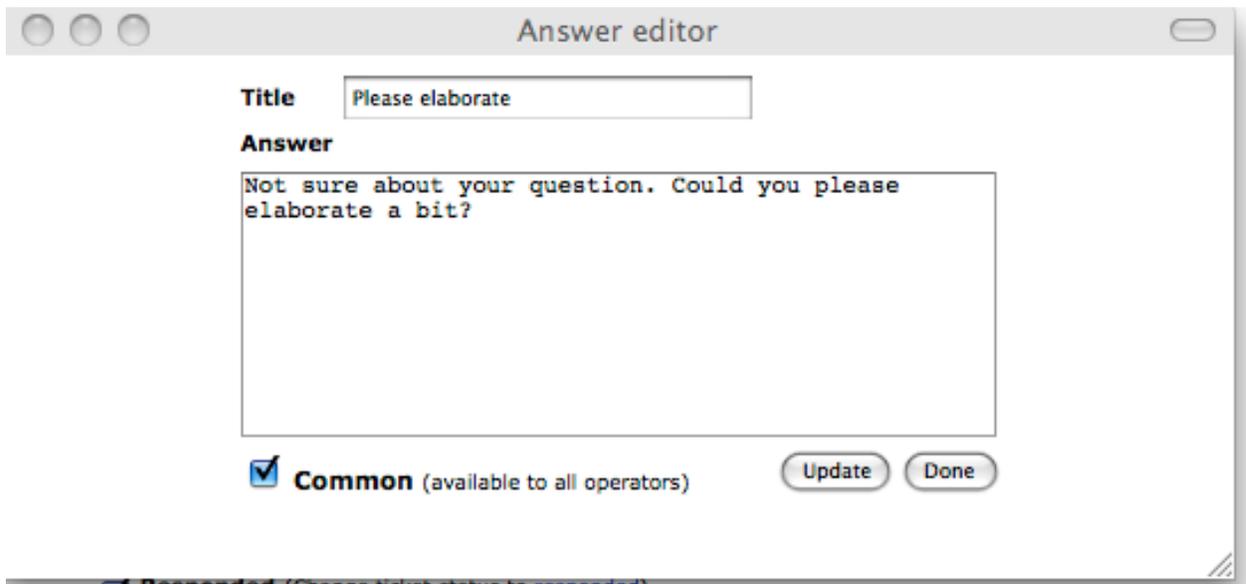


Pic.23. Answer Library. Answer template has been appended to a message.

4.2. Creating new answer template.

To create a new answer click the *New* button. In the new answer form (picture 24) fill in the *Title* and *Answer* fields. Checking the *Common* box will add the answer template to shared library, thus all operators will be allowed to use the answer. However, you will retain an ownership over the template, that is only you may apply changes to it. Click *Update* button to save the answer. Click *Done* when ready.

Important: The *Done* button will exit the answer editor form without applying any changes. Do not forget clicking the *Update* prior to leaving the form.



Pic.24. Answer Library. Creating new answer template.

4.3. Editing an answer template.

To modify an answer template first select it (see picture 22), then click *Edit*. Please note that you may edit only the answer templates you own.

4.4. Deleting an answer template.

To delete an answer template first select it (see picture 22), then click *Delete*. Please note that you may delete only the answer templates you own.

Appendix

A. Understanding ticket status.

Pending. Service ticket is queued for processing. No operator assigned to the ticket. This is an initial state of any inquiry.

Open. Service ticket is taken by an operator. Response required from the operator. A customer may add a follow up message to the ticket.

Responded. A response has been sent to a customer. The response may contain complete answer or a request for further information. Response may be required from the customer. An operator may add a follow up message to the ticket.

Closing. The ticket is processing is complete. No action required from an operator. No action required from customer. However both parties may submit followup messages, thus flipping ticket state to Open or Responded. The intended use of the Closing status is to mark the issue as solved, while leaving an option for a customer to disagree. The Smart Answer may silently close (change status to Solved) such tickets after specified period of time (please use setup menu to adjust auto-closing preferences).

Solved. The service ticket is closed. A customer may not add a follow up message. An operator may reopen the ticket.

Please keep in mind that the Smart Answer facilitates communication process. Communication is a sequence of questions and answers, the call and response process. Any communication tool must be able to track who is responsible for the next action. If status is *Open* - the operator is responsible. Status is *Responded* - the operator did his or her job, an input (may be) awaited from a customer.

The Ticket Browser shows additional options for status in the filter drop down selector. These options are aliases for a combination of status values. They may not be assigned to the status field and are for search filter only.