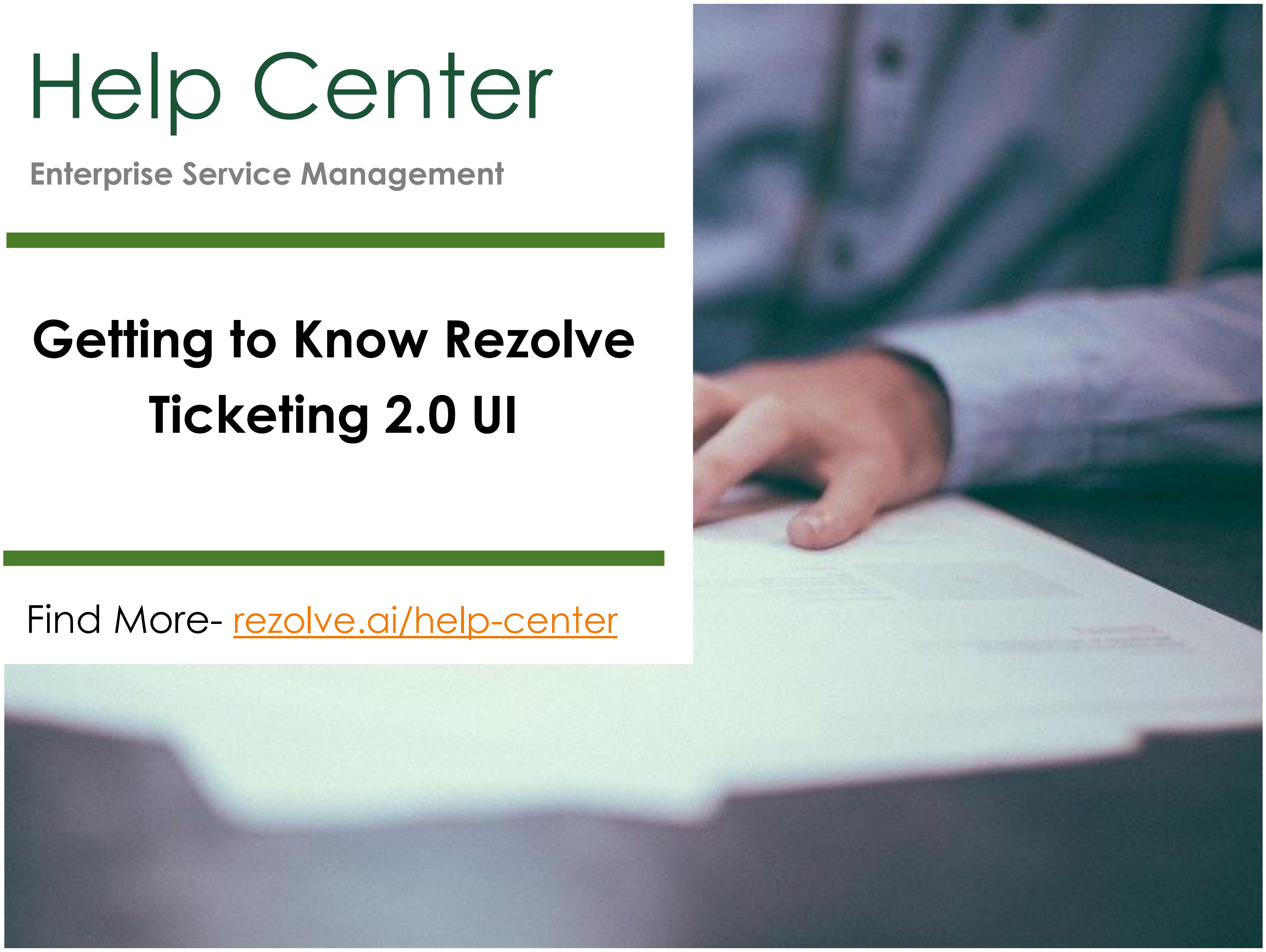
Help Center

Enterprise Service Management

Getting to Know Rezolve Ticketing 2.0 UI

Find More- rezolve.ai/help-center



11501 Dublin Blvd STE 200, Dublin, CA 94568

info@rezolve.ai | www.rezolve.ai

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ABOUT TICKETING 2.0 UI AND ITS CURRENT STATUS

Rezolve Ticketing 2.0 UI is still in a development stage. We configured the bases and have been adding enhancements to it based on your feedback. All new features added to ticketing will only be developed for the Ticketing 2.0 UI.

ACCESSING TICKETING 2.0 UI

To access the Ticketing 2.0 UI, navigate to Ticket Management >My Tickets page and click on the "Switch to preview" toggle.

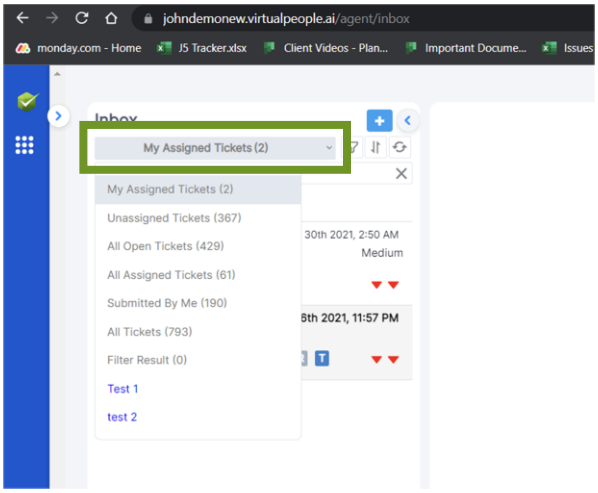
Note: As a Ticket Agent Supervisor you may also see this toggle on other pages.

INBOX LAYOUT (LEFT SIDE PANEL)

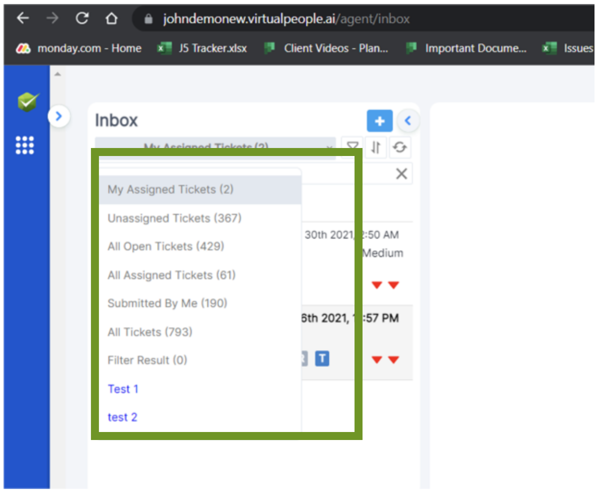
Quick View Options

To change the set of tickets displayed in your Inbox:

1. Click the dropdown under the word Inbox to open the *Quick View menu*



2. Select which set of tickets you would like to view
    a. My Assigned Tickets: view of all the tickets that are currently assigned to you
    b. Unassigned Tickets: view of all the unassigned tickets for the queue(s) you are a member of.
    c. All Open Tickets: view of all the open tickets for the queue(s) you are a member of.
    d. All Assigned Tickets: view of all the assigned tickets for the queue(s) you are a member of.
    e. Submitted By Me: view of all the tickets you created/raised.
    f. All tickets: view of all the tickets for the queue(s) you are a member of (no matter the status).
    g. Filter Results: view of tickets based on your filter.
    h. Other views in blue: If you have saved filters you will also be able to access them quickly in the Quick View Menu

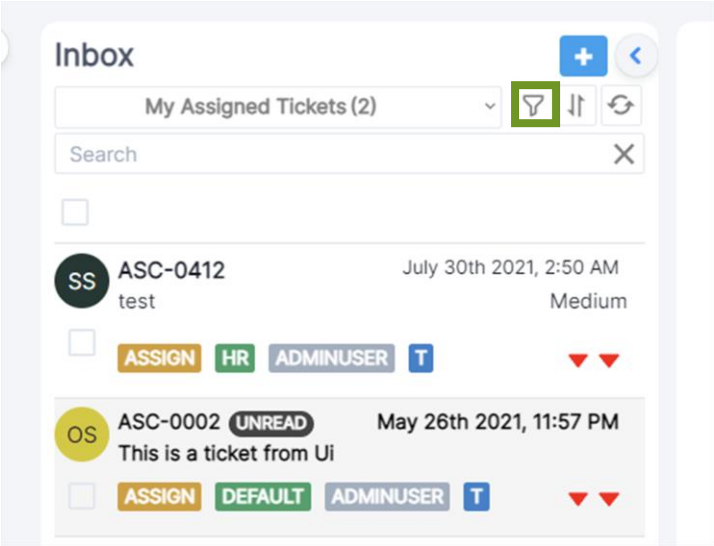


USING FILTERS

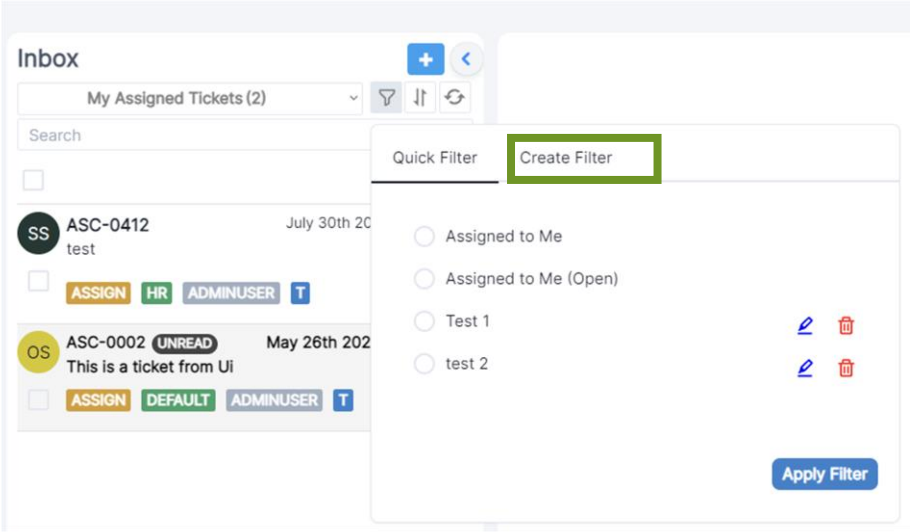
When creating a filter, you have the option to run without saving (if for one time use) or saving it if you would like to use it at a later date. The filter will only be available for your usage.

Creating a Filter

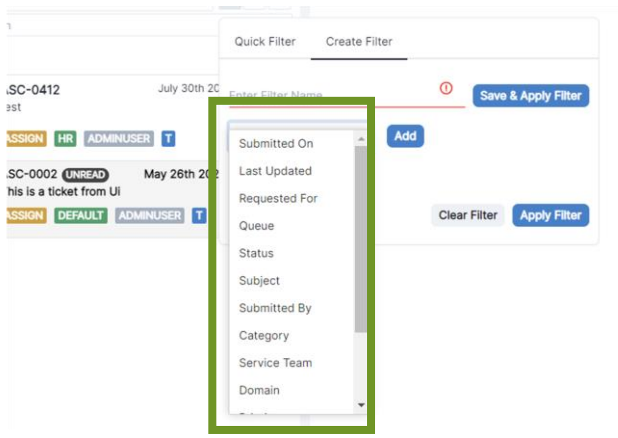
1. Click on the funnel next to the Quick View dropdown menu



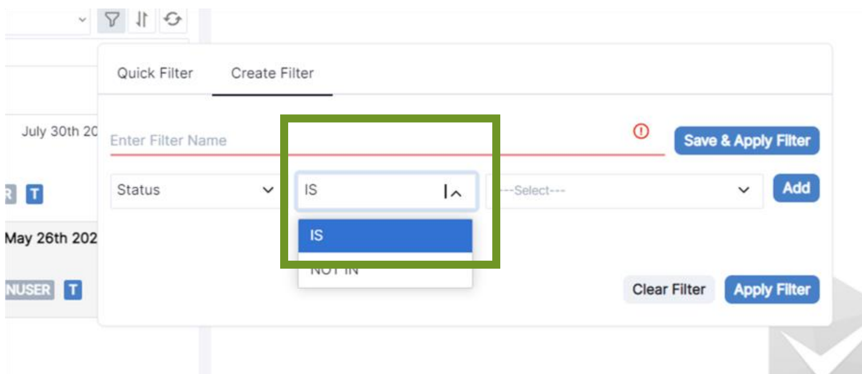
2. Click the **Create Filter** tab



3. Select the field you would like to use as a filter (you will be able to add multiple)

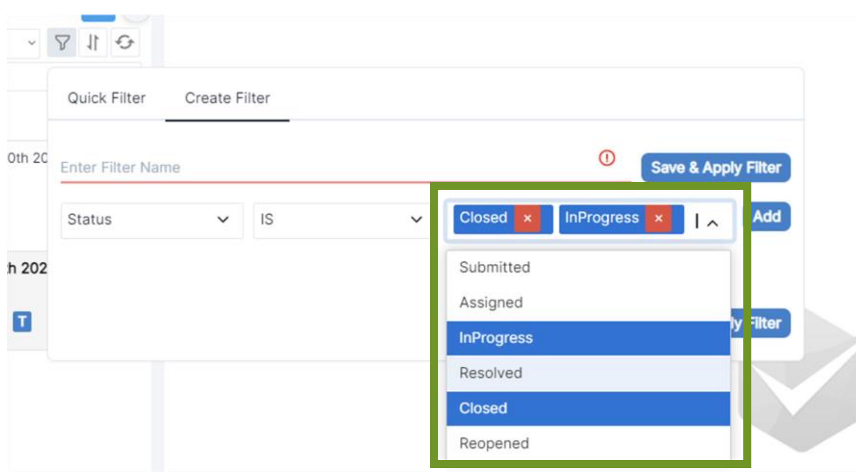


4. Select the operation parameter

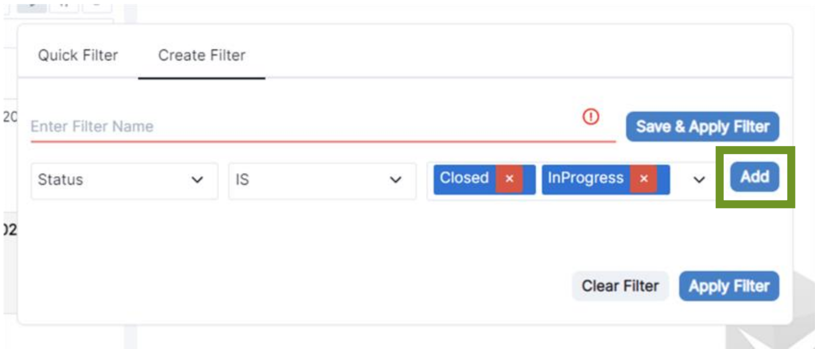


5. Select or enter the value (depending on which field you chose this may be a dropdown or textbox)

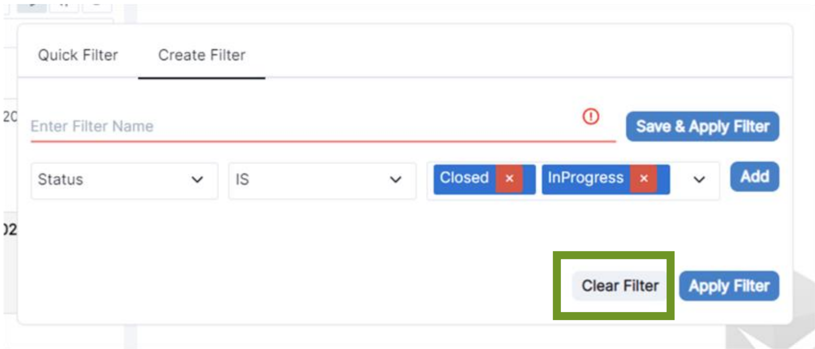
Note: If you would like to choose multiple values from a drop down simply select all the relevant values until you are done. Click outside the box when done.



- To add another field to your filter click **Add** and repeat steps above until your filter is built as you wanted

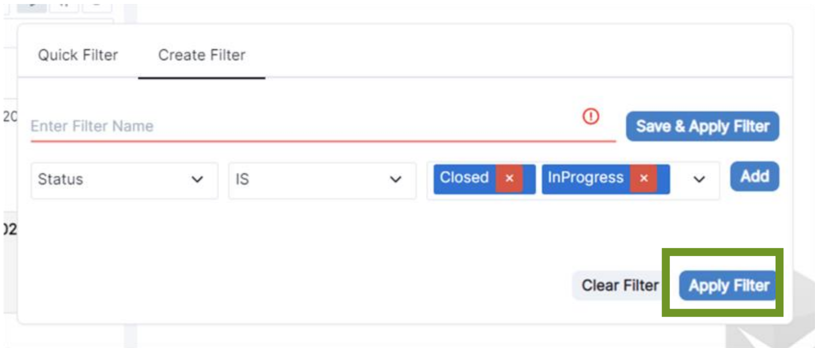


- To clear what you have done and start over click **Clear Filter**

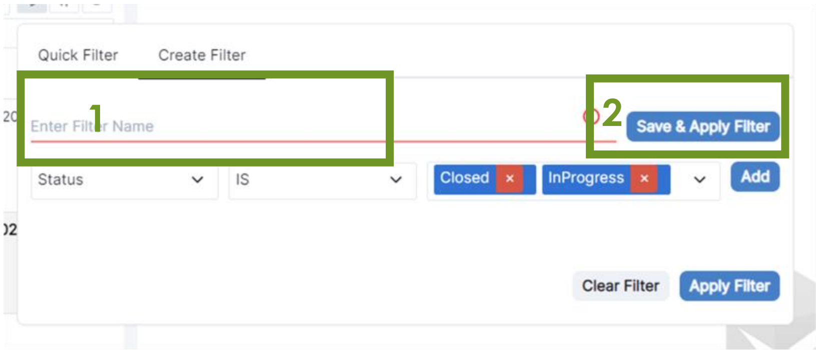


Saving a Filter

6. Once done building out your filter, you can:
   a. Run your filter without saving it (one time use) by clicking **Apply Filter**



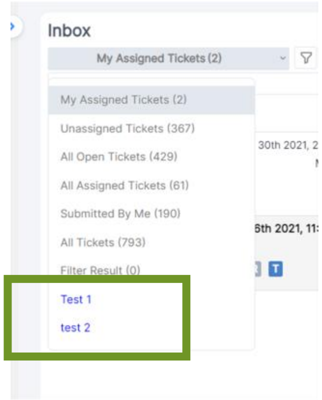
b. Run your filter and saving it for later usage, give it a name and click **Save & Apply Filter**



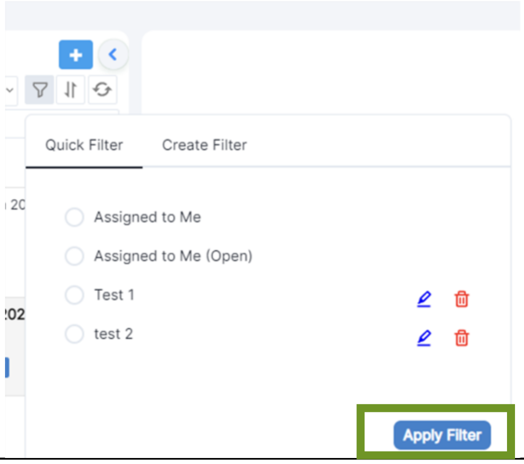
Running a Saved Filter

Your saved filter can be found on the Quick View dropdown or Quick Filter tab.

- To run the filter from Quick View dropdown menu, simply click on the dropdown and select the name of the filter you want to run from the list.



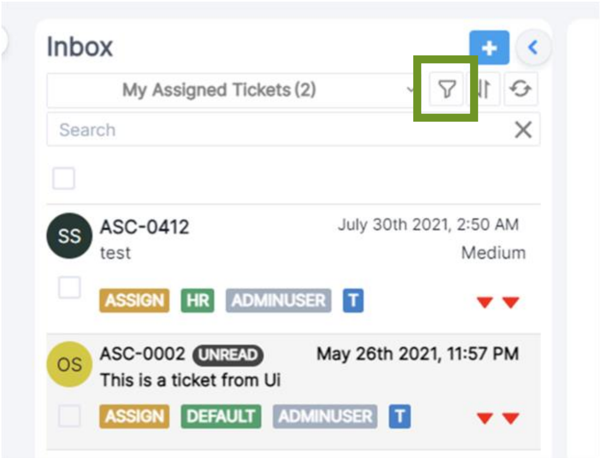
- To run the filter from Quick Filter, select the filter and click **Apply Filter**.



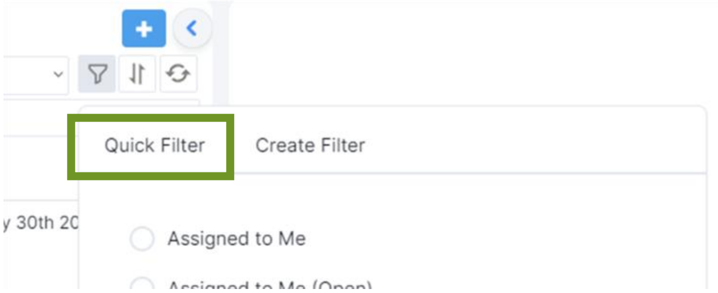
Edit a Saved Filter

To edit your saved filter:

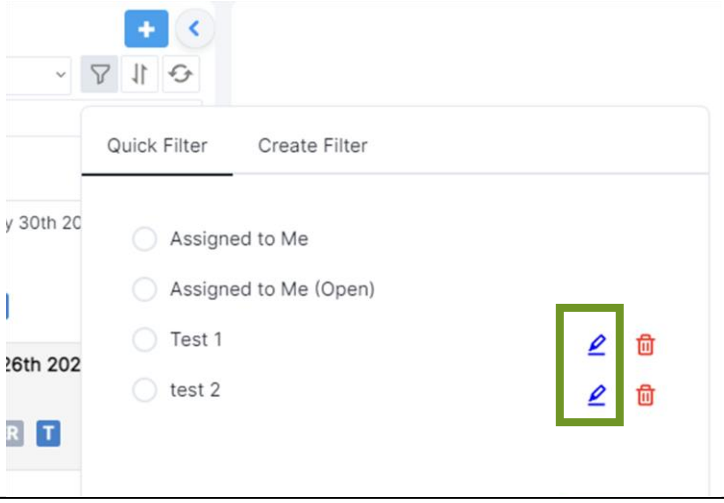
1. Click the funnel next to Quick View Dropdown



2. Select Quick Filter tab



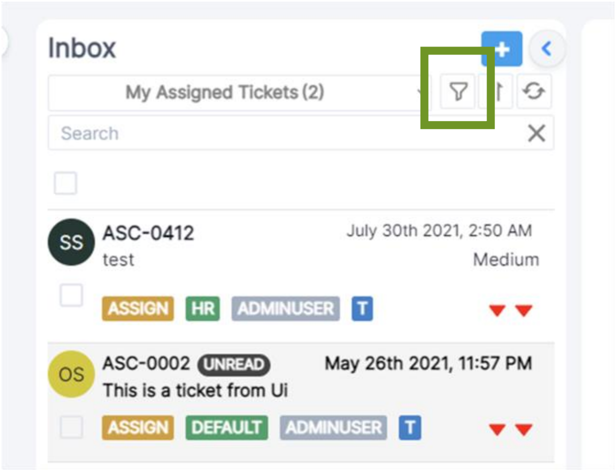
3. Find the filter you would like to edit
4. Click the pencil that is on the same row as it



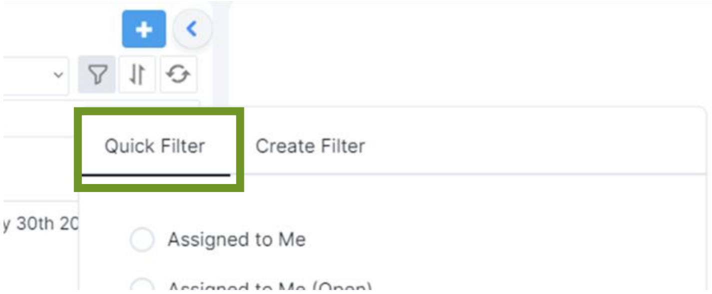
Delete a Saved Filter

To delete your saved filter:

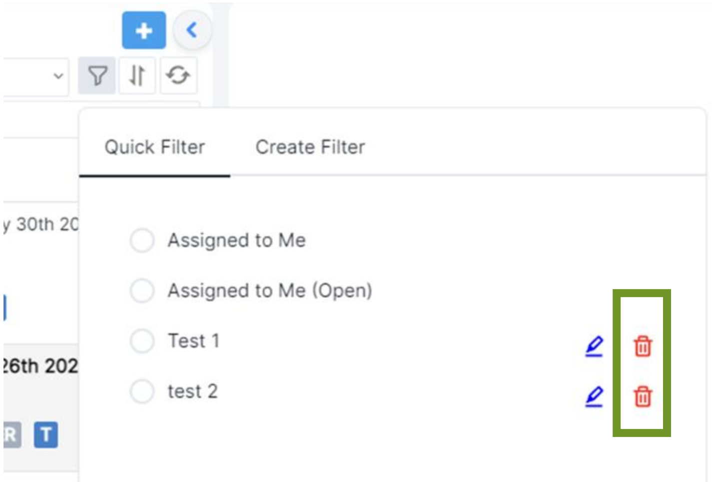
1. Click the funnel next to Quick View Dropdown



2. Select Quick Filter tab



3. Find the filter you would like to edit
4. Click the trash can that is on the same row as it

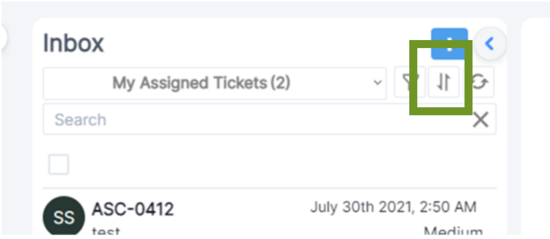


USING SORT OPTION

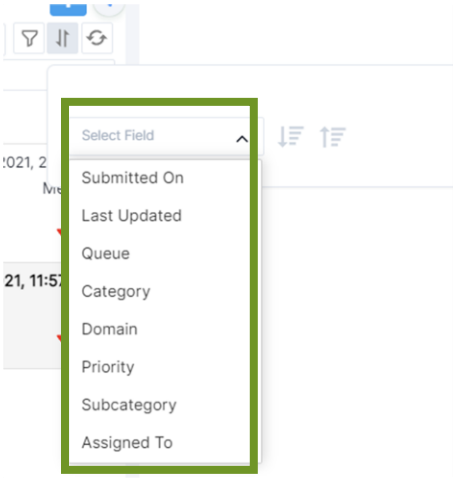
By default, any view you are looking at will always have the newest change first.

To sort by a specific ticketing field

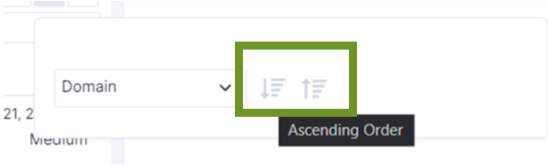
1. Click the Sort icon (found right after filter icon of a funnel)



2. Select the field you would like to sort by from the list of options



3. Choose Ascending or Descending

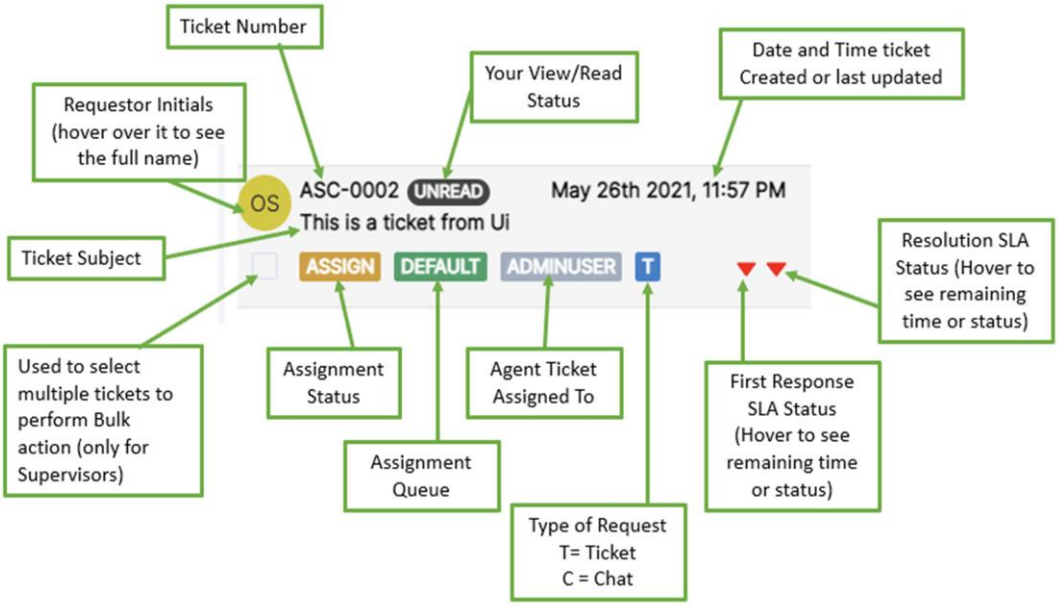


4. Your view will automatically update

To Reset the View to Default

Click the Reset icon next to sort.

UNDERSTANDING THE MEANING OF THE INBOX ITEMS

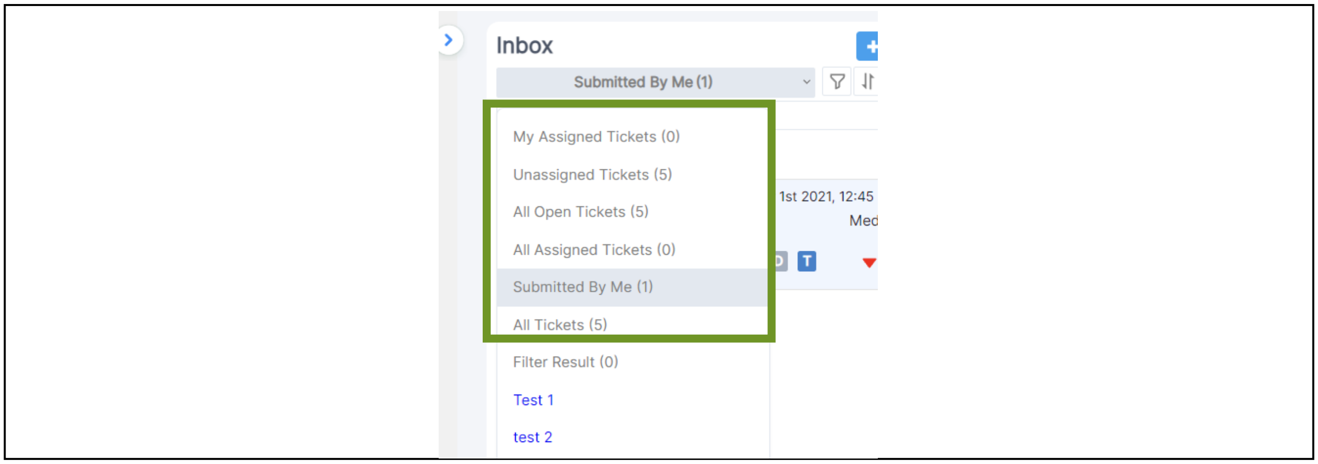


SEARCH FOR A SPECIFIC TICKET

When looking for a specific ticket you can search by ticket number, requestor, or ticket subject. The search field can be found under the Quick View dropdown.

To search, enter the ticket number, requestor email address, or ticket subject in the search bar and hit enter.

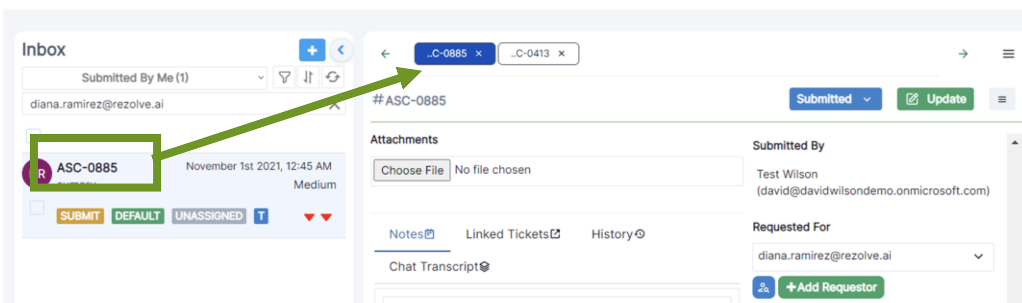
Note: Your search will be applied to all Quick Views. If you don't see your ticket in your current view, select the Quick View dropdown (you will see a numerical value of how many tickets in that particular view matches your search.



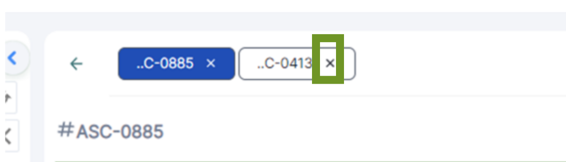
VIEWING AN EXISTING TICKET AND REMOVING TICKETS FROM VIEWING PANE (MIDDLE PANEL)

To open an existing ticket to see the details, double click on the ticket to open it in the ticket reading pane.

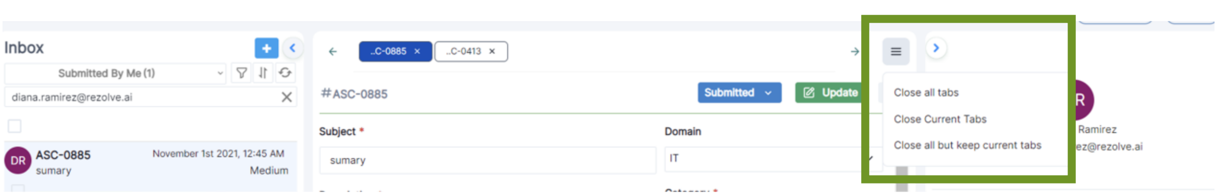
Note: You can have multiple ticket open in the reading pane at the same time.



If you are done working on a ticket and no longer want to see it, click the X next to the ticket number in the ticket view pane.



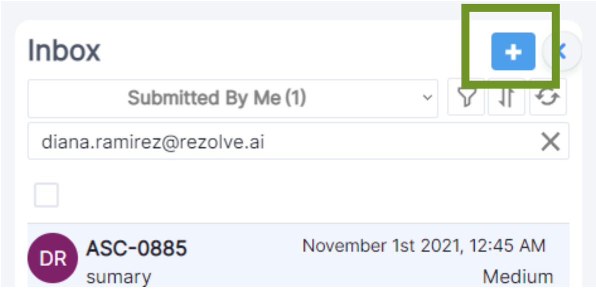
Alternatively, you can use the menu icon (3 lines in the same row as ticket numbers) to complete bulk actions.



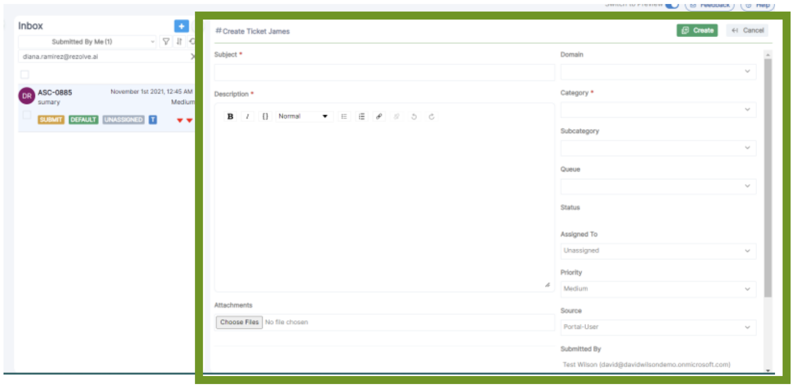
CREATE A NEW TICKET

To create a new ticket:

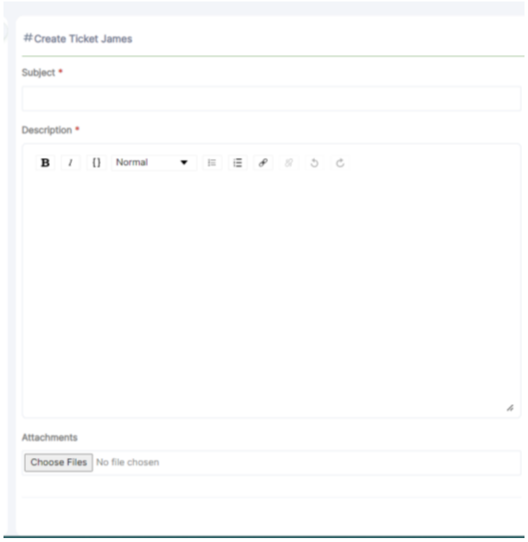
1. Click on the + above the Sort icon



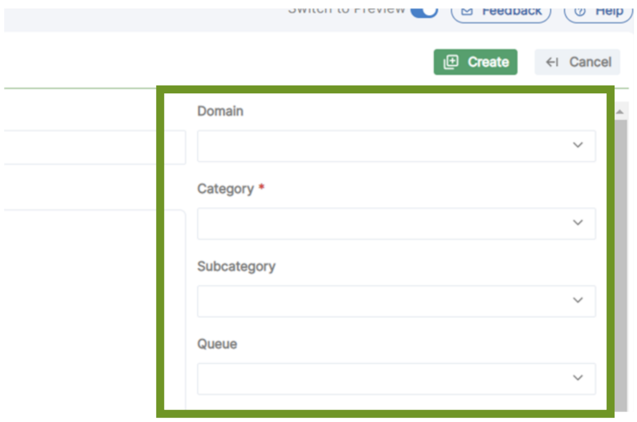
2. A blank ticket will open in ticket reading pane



3. **Enter the details** like Subject, Description and add any attachments.

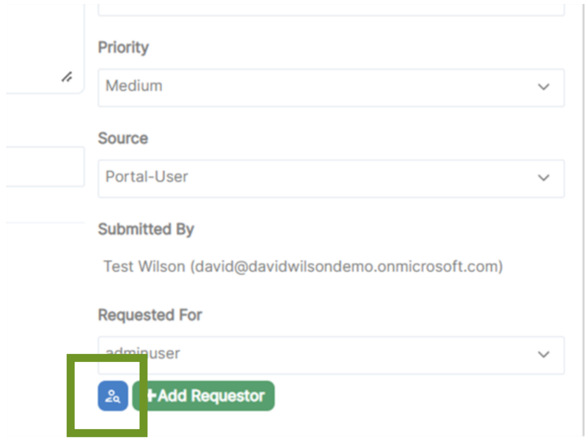


4. Select the appropriate Domain, Category, Subcategory and/or Queue (whichever fields are relevant for your setup) for the ticket topic

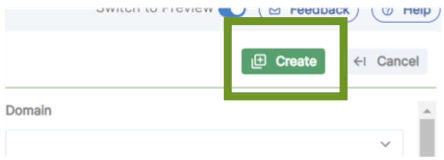


5. Select the relevant Priority and Source

6. Only change the **Requested For** if different from Submitted By (click the blue icon of person with magnifying glass to search)



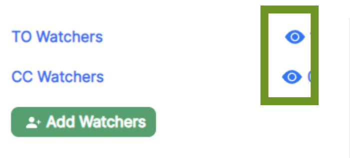
7. Click on **Create**



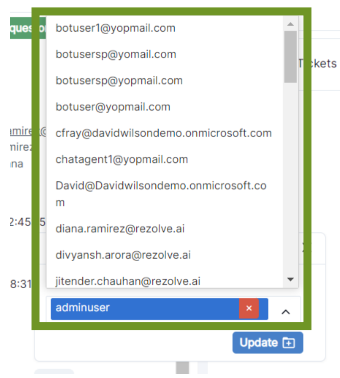
ADDING A WATCHER TO A TICKET

A watcher is someone (outside of the requester) who needs to be aware of what is happening on a ticket. Having them also helps when you want to take some input from any other user – for example – an approval or a suggestion.

1. Open the ticket you want to add a watcher to
2. Scroll down to the watcher section
3. Click on the icon of an eye next to 'To Watcher' or 'CC Watcher'
    - ***'To' watcher*** **-** Agents can add a 'To' watcher in case they want the watcher to be in the 'To' participants of each Notification email.
    - ***'CC' watcher*** **-** Agents can add a 'CC' watcher if they want the watcher to be in the 'CC' participants of each Notification email.

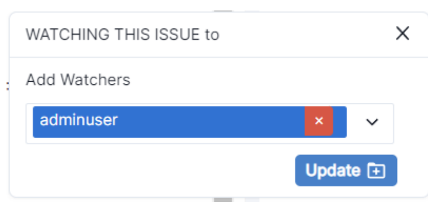


4. Scroll through the dropdown list and select your watcher

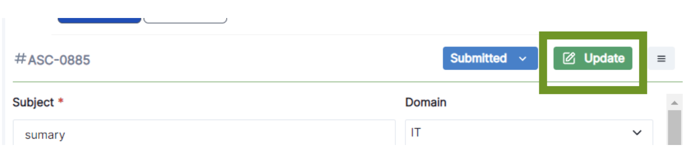


Note : To notify someone who is not in the list, you will have to create a watcher account manually.

5. Click **Update** when you are done adding your watchers



6. Click on **Update** at the top of the ticket to save your changes

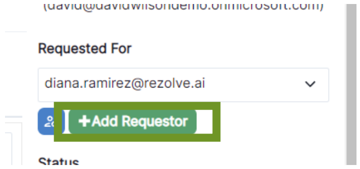


CREATING A REQUESTER OR WATCHER MANUALLY

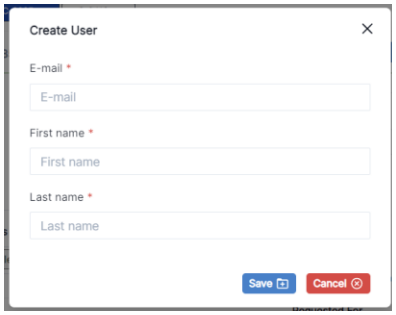
If a requestor or watcher is not showing in their respective list, you can manually create.

Create a Requester

1. On the ticket that the requestor is missing, click **+ Add Requestor**



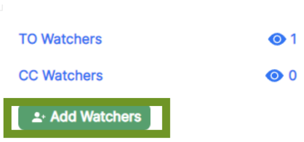
2. Fill out the person's Email, First Name, and Last Name



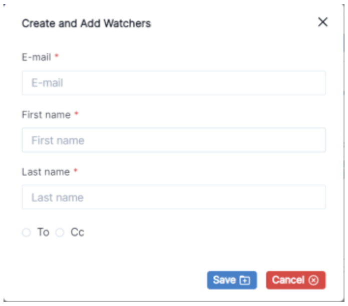
3. Click **Save**

Create a Watcher

1. On the ticket that the requestor is missing, click **+ Add Watchers**



2. Fill out the person's Email, First Name, Last Name and if to add them to Watcher To or CC List



3. Click **Save**

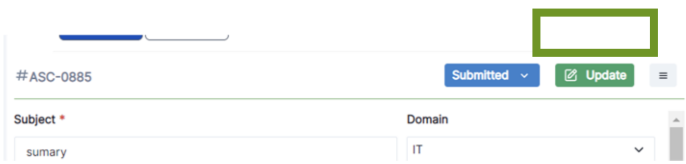
UPDATING A TICKET

Updating a ticket can involve:

- ✓ Changing the **Subject** of the ticket
- ✓ Changing the **Description** of the ticket
- ✓ Changing ticket properties such as Domain, Category, Subcategory.
- ✓ Change ticket priority
- ✓ Changing the **“Assigned To”** field.
- ✓ Changing of the **“Requested For”**.
- ✓ Add or Remove Watchers
- ✓ Add or Remove attachments
- ✓ Updating **Status** of the ticket using **workflow** button.
- ✓ Adding a Note

Updating Subject, Description, Domain, Category, Subcategory, Priority, Queue, Assigned To, or Requested for Fields

1. Open the ticket that you want to update
2. Make your changes to the desired field(s)
3. Click **Update** to save your changes when done

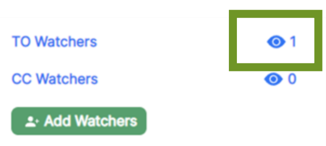


Add or Remove a Watcher

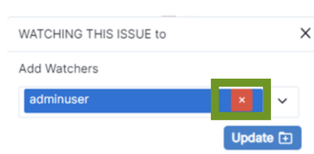
For instructions on adding a watcher please refer to [Adding a watcher to a ticket].

To remove a watcher:

1. Open the ticket you want to add a watchet to and scroll down to the watcher section
2. Click on the icon of an eye next to ‘To Watcher' or 'CC Watcher'



3. Click the **x** next to the watcher you want to remove and click **Update** when done

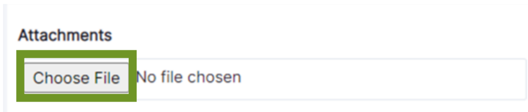


4. Click on **Update** at the top of the ticket to save your changes

Adding an Attachment

To add an attachment directly on the ticket:

1. Click **Choose File** under Attachment section header (found directly under ticket description)

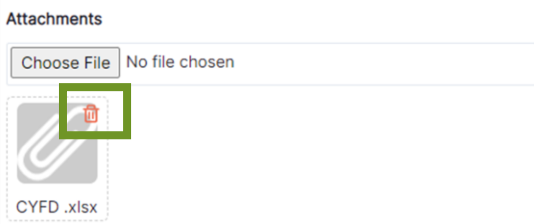


2. Browse your computer until you locate the file
3. Once you have found it click on it and the file will be added

Remove an Attachment

To remove an attachment that is saved directly on the ticket:

1. Go to the Attachment section (found directly under ticket description)
2. Click the trash can on the file you would like to delete



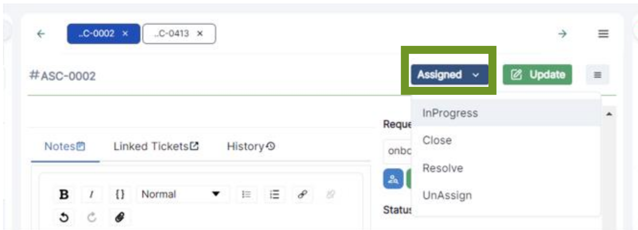
3. Click **Confirm** on confirmation pop-up and file will be removed

Changing Status of a Ticket

All tickets go through a cycle from creation to resolution. In Rezolve this is the Ticket Status workflow. The standard ticket status workflow for most tickets will be:

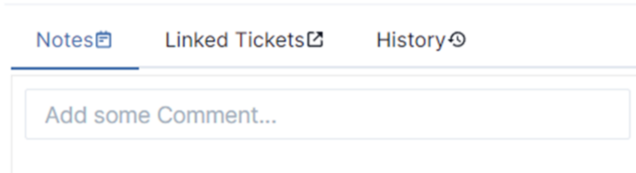
- Submitted - >Assigned ->InProgress ->Resolved - > Close / Reopen

To change at which point the ticket is at, click the Status workflow button and choose the correct one. The menu options you will see depends on the ticket's current status. If a note is required for the new status, you will be prompted to add one.

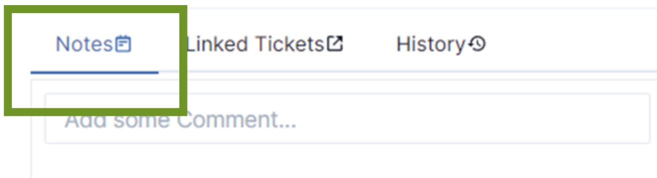


Adding a Note

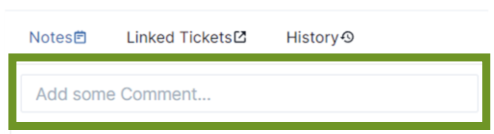
1. Open the ticket that you want to add a note to
2. Scroll down to the Notes section found under attachments



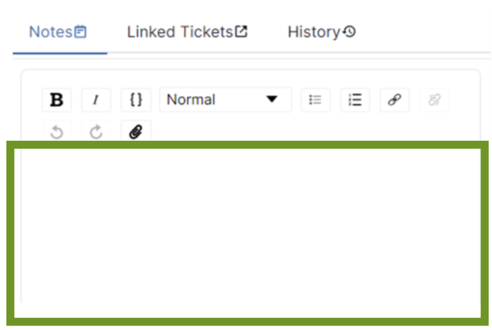
3. Make Sure the Notes tab is selected (writing will show in blue with a blue line under it)



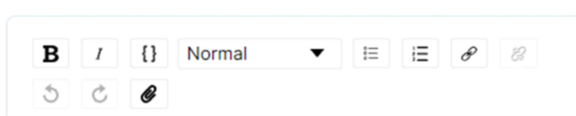
4. Click in the **Add some Comment…** box to expand the full Notes section



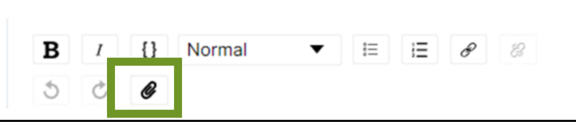
5. Write your Note



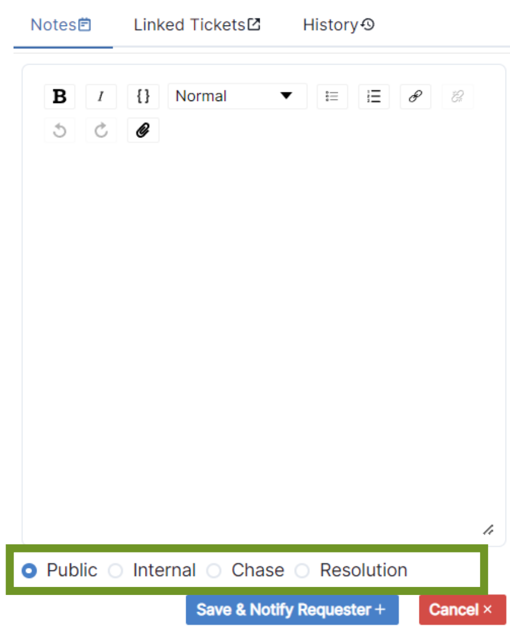
- You are allowed to copy and paste images directly into your notes
- You have a rich text editor toolbar that allows you to bold, italicize, use bullets, use numbering, create links, attach a document etc to your note.



- You can add an attachment to a note by clicking on the paper clip. This will become an attachment of the ticket email notification if you chose a note that sends one



1. Chose your note type



- **Public Notes** - These notes are visible to everyone who can view the ticket. Agents can use this note to notify the end-user.
- **Internal Notes** - These notes are only visible to Agents. Internal notes can be used for internal communications when you don't want to notify the end-user.
- **Chase Notes** - These notes are only visible to Agents when a chase note is added, it sends an email to the Assigned Agent and the Supervisor of the Assigned Agent. This can be used when the end-user contacts the support team for an update or further assistance on an existing ticket but the agent (currently speaking with the end-user) is unable to to provide either.
- **Resolution Notes** - To resolve a ticket in a gif Agents can add a Resolution Note. When a Resolution Note is added it notifies the end-user, moves tickets to 'Resolved' state, and brings Agent to the ticket list screen.

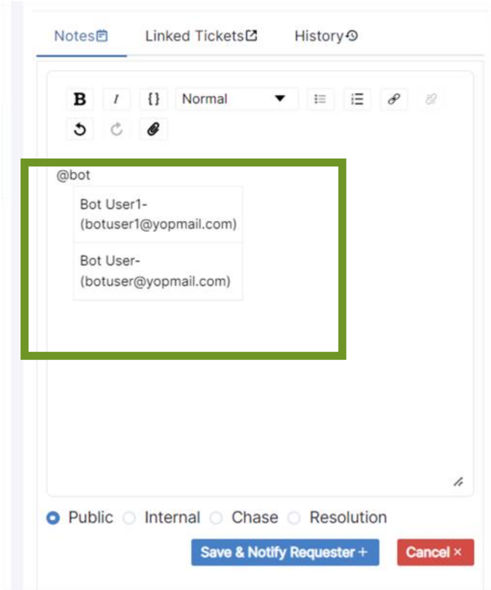
2. Click on:

    - 'Save & Notify Requester' (when note type is Public)
    - 'Save' (when note type is Internal)
    - 'Save & Escalate' (when note type is Chase)
    - 'Save & Mark Resolved' (when note type is Resolution)

Tagging Someone in a Note

You can tag someone in your note to call them out if needed. This will automatically add them as a watcher on the ticket.

1. Open the ticket that you want to update
2. Scroll down to the *Notes* section (Right under Attachments)
3. To call out the person simply type @
4. This will cause a dropdown list of name to appear, you can scroll through the list or continue typing out the name



5. Select the person and write your note

Note: If you do not see the person in the list [add them manually as a watcher](#).

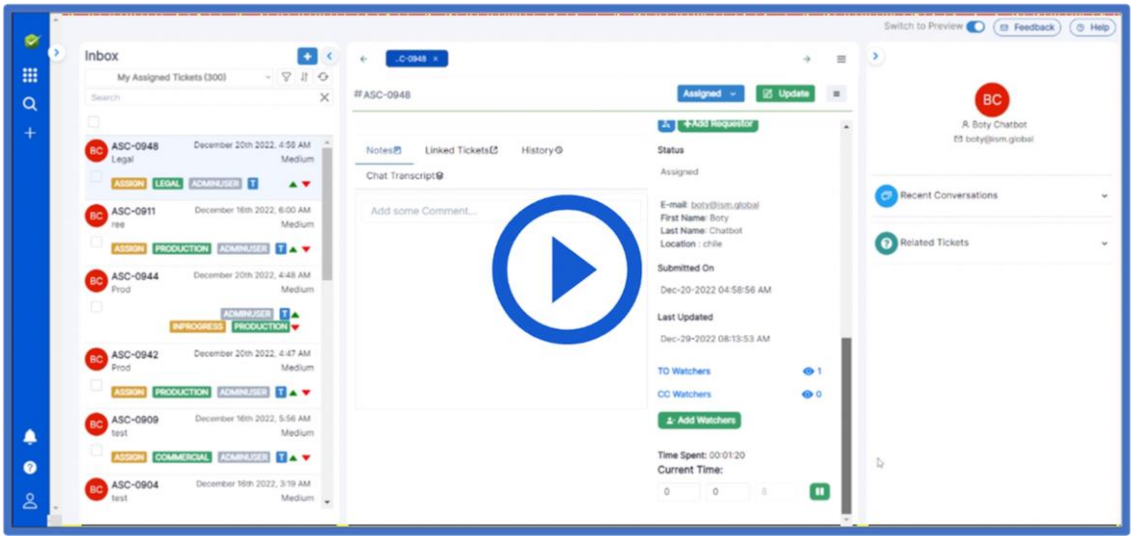
6. Click on one of the following when done:

   - 'Save & Notify Requester' (when note type is Public)
   - 'Save' (when note type is Internal)
   - 'Save & Escalate' (when note type is Chase)
   - 'Save & Mark Resolved' (when note type is Resolution)

LINKING TICKETS (PARE/CHILD TICKET CONCEPT)

There are various reasons you may need to link tickets together. Maybe there is an outage, or maybe the requestor reported the same issue in multiple tickets. In ticketing you can link these issues together.

You can search for tickets you would like to link to your current ticket. You can search by subject or ticket number. Simply click on the magnifying glass.



There will be future enhancements on this feature. Such as if you close the parent ticket you'll be prompted to close all child tickets.

11501 Dublin Blvd STE 200, Dublin, CA 94568

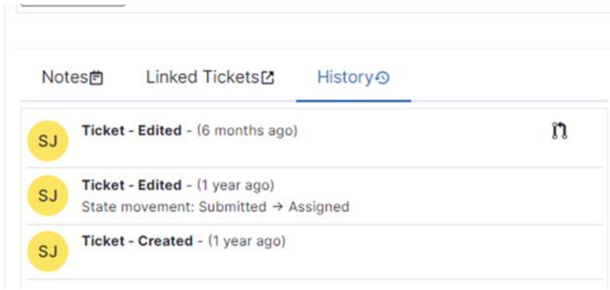
info@rezolve.ai | www.rezolve.ai

AUDIT TRAIL (TICKET HISTORY)

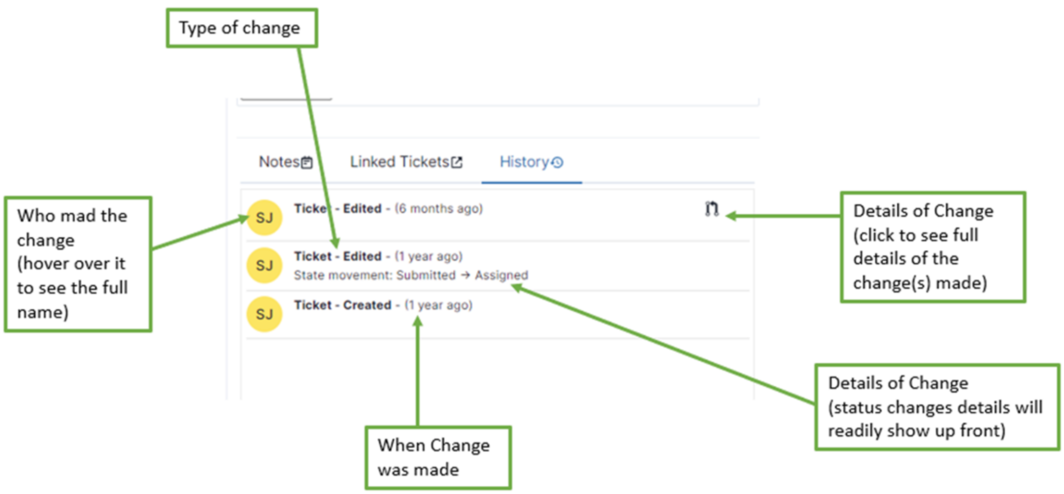
You can easily see a tickets audit trail. This is an easy way to see the history of who made what changes on a ticket.

About History tab

1. On the ticket you want to see the history off, scroll down to the Notes section (under attachments)
2. Click the **History** tab
3. You will see a list of all the changes made on the ticket



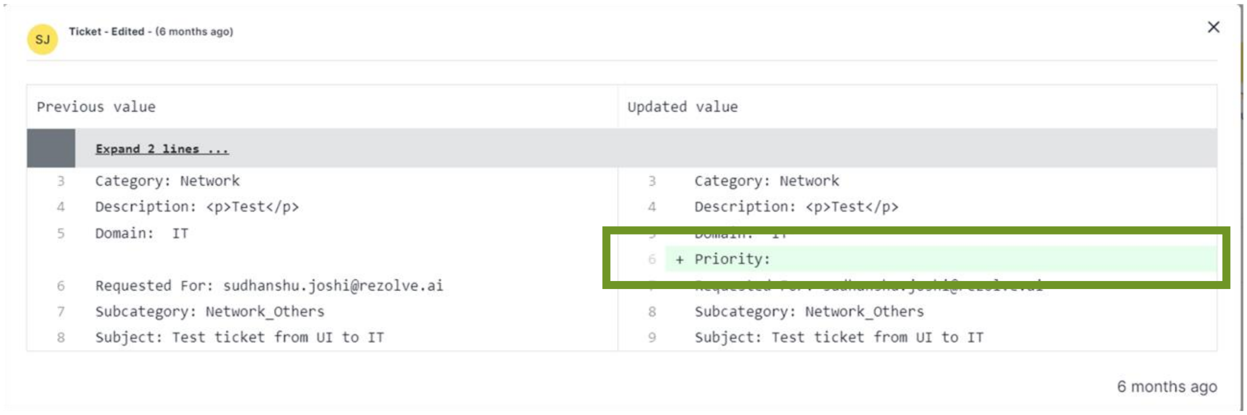
Reading the History tab



More on Details of Change

Details of some changes will readily be available for you in the main History tab: for example, ticket creation and status change. Others will require for you to click the icon.

You will be able to see the previous and updated value of the field.

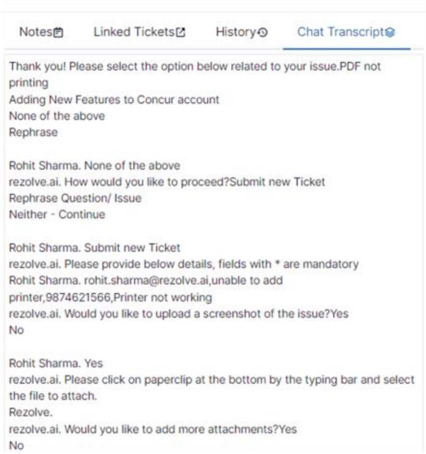


The change will be highlighted for you to easily see it.

VIEWING CHAT TRANSCRIPT IN A TICKET

Bot Chat Transcript (Interactions with the Bot)

The Chat Transcript tab shows you the conversation between the ticket submitter and the bot. If you do not see the Chat Transcript tab, that is because the ticket was not raised through the bot.



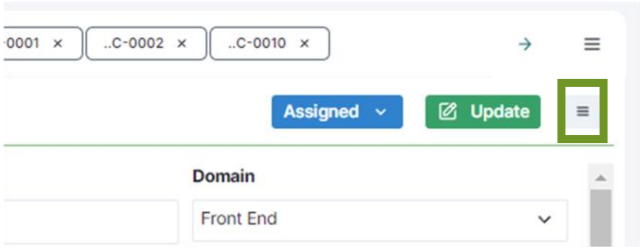
Live Agent Chat Transcript (Interaction with Live Agent)

The chat transcript between submitter and a Live Agent will be added as a not on the bot created ticket when the chat ends.

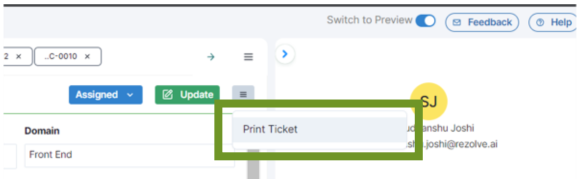
PRINTING A TICKET

If needed; for audits etc., tickets can be printed.

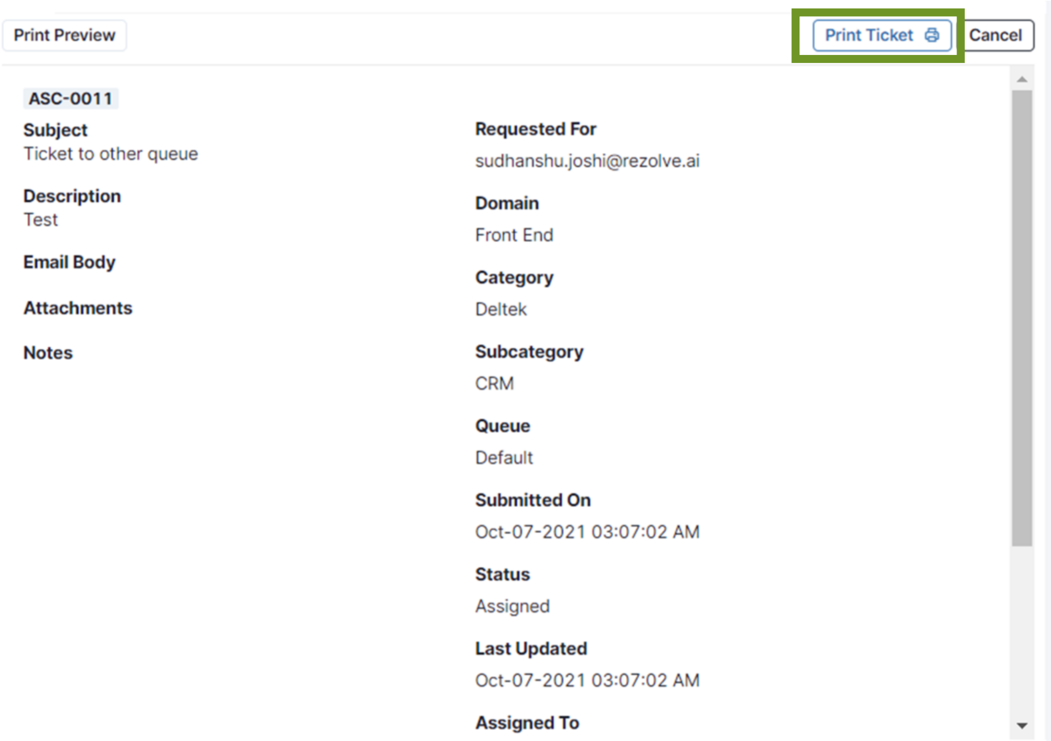
1. Go to the ticket you would like to print
2. Click the 3 lines icon next to the '*Update*' button



3. Click **Print Ticket**



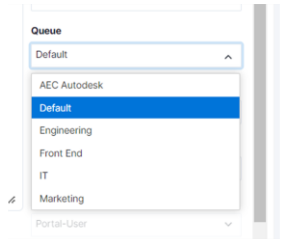
4. The Ticketing Viewing Panel will become a Print Preview screen
5. On the Print Preview screen, click **Print Ticket**



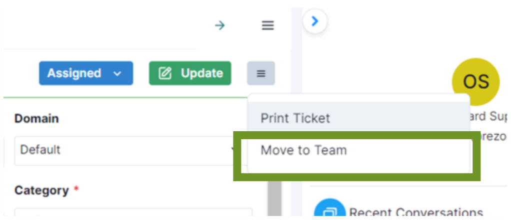
TRANSFERING A TICKET

There are times where tickets might need to be transferred between multiple queues or Departments/Teams.

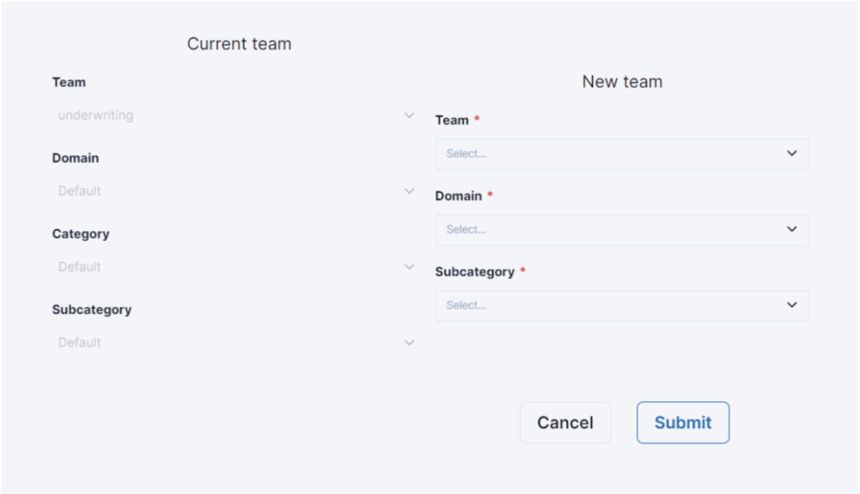
If your Rezolve Tenant is set up as a single Department, you will transfer using the Queue field on a ticket. Simply, click on the Queue dropdown and select the Queue you want to send the ticket to.



If your Rezolve Tenant is set up like a Multi-Department (end users have to choose which team to raise the ticket to), you will need to use the *Move to Team* option.



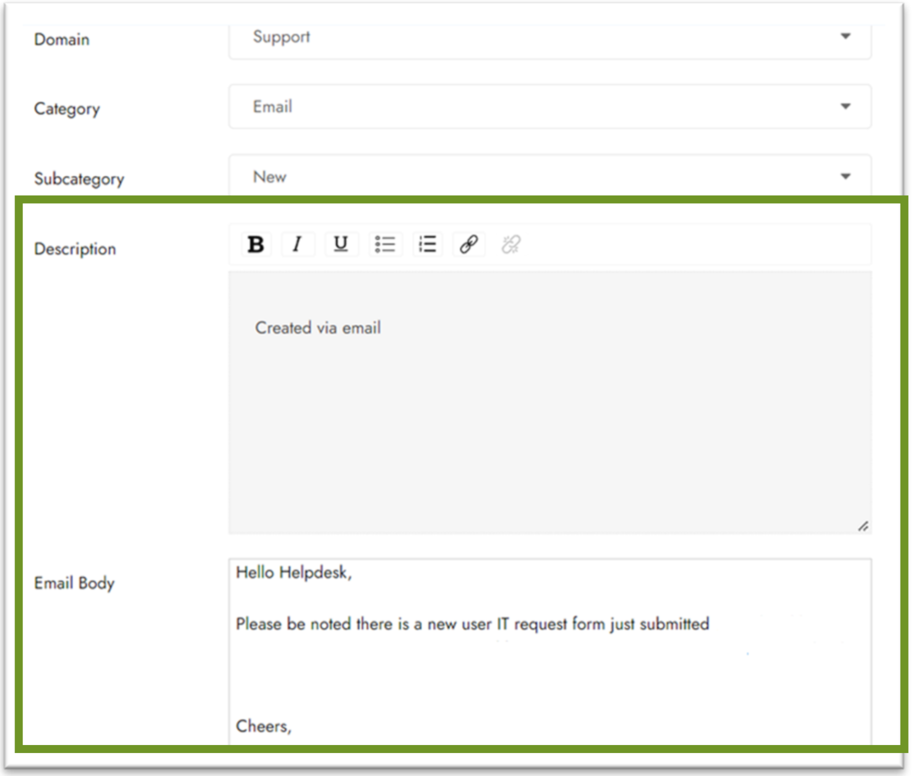
1. On the ticket you want to transfer click the 3 lines next to *Update*
2. Click on **Move to Team**
3. Fill out the required fields for the new Team



4. Click **Submit**

Ticket maintaining the Email's HTML format

Tickets created via email now display in their original HTML format directly in the ticket. The ticket description will show "Created via Email" and the original email will show in the new Email Body field. In addition, the original email is also available as an attachment on the ticket.



What happens with email replies?

When someone replies on the original email or ticketing notification email the current status of the ticket dictates the system's behavior.

If the ticket is ***open*** (Status of Submitted, Assigned, In progress, or custom created status) the email will be ***added as a note*** on the ticket.

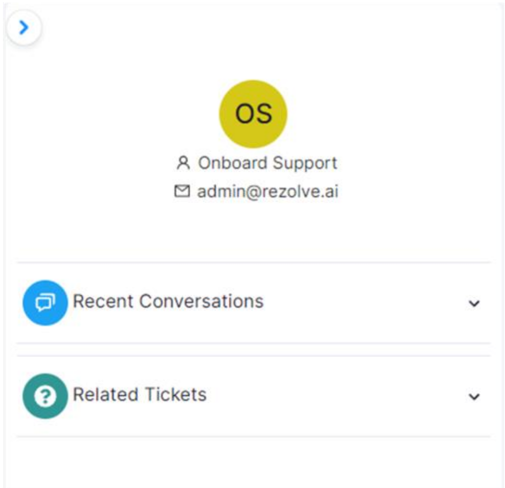
If the ticket is in '***Resolved'*** status the email will cause the ***ticket to be reopened*** and the email will be ***added as a note***.

If the ticket is in '***Closed'*** status the email will cause a ***new ticket*** to be created.

RIGHT SIDE PANEL

Currently, the right-side panel has two options:

- Recent Conversation
- Related Tickets



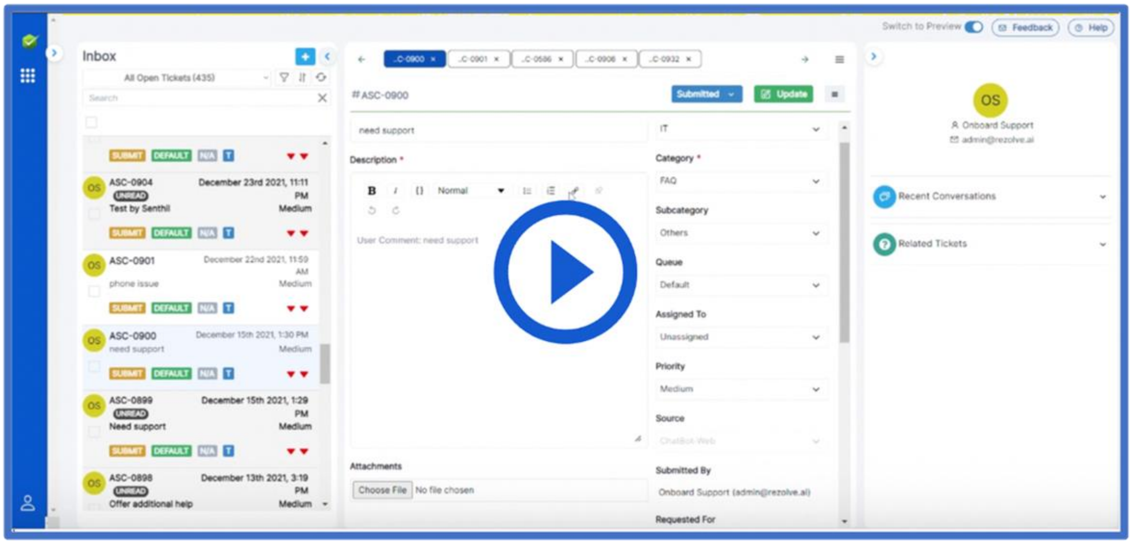
Both options are specific to the ticket Requestor. Recent Conversations will show the Live Chat interactions for the requestor. Related Tickets will show all tickets for this requestor (open, resolved or closed).

Using Recent Conversations and Related Tickets

1. To expand that section to see the interactions or tickets, simply click on which option you would like.
2. To see a specific live chat interaction or ticket from the presented list, click on it and it will open in the middle viewing pane.

ABILITY TO CALCULATE AN AGENT'S TIME SPENT ON A TICKET

We can enable a feature that will start a timer to calculate how long a ticket agent is working on a ticket. They can manually enter the time and/or pause the timer. The system will calculate the total time per status. To enable this request please speak to your Customer Success Manager.



CUSTOMIZING INBOX LAYOUT

Collapsible side panels

You have the ability to collapse the left and/or right-side panels to give you more space in the middle panel. Click on the to collapse the left panel or to collapse the right panel.

Resize Left Panel

In addition, you can resize the left panel to control the width of it. Hover your mouse on the gray line between the left and middle panels, a blue line will show up with a left/right arrow, drop the bar until the left panel is at your desired size.