B2GNOW Software for Government

Staff User Manual

Chapter 7 – Help Desk

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Chapter 7 – Help Desk

The B2Gnow system includes a Help Desk module that allows you to track and respond to customer support queries.

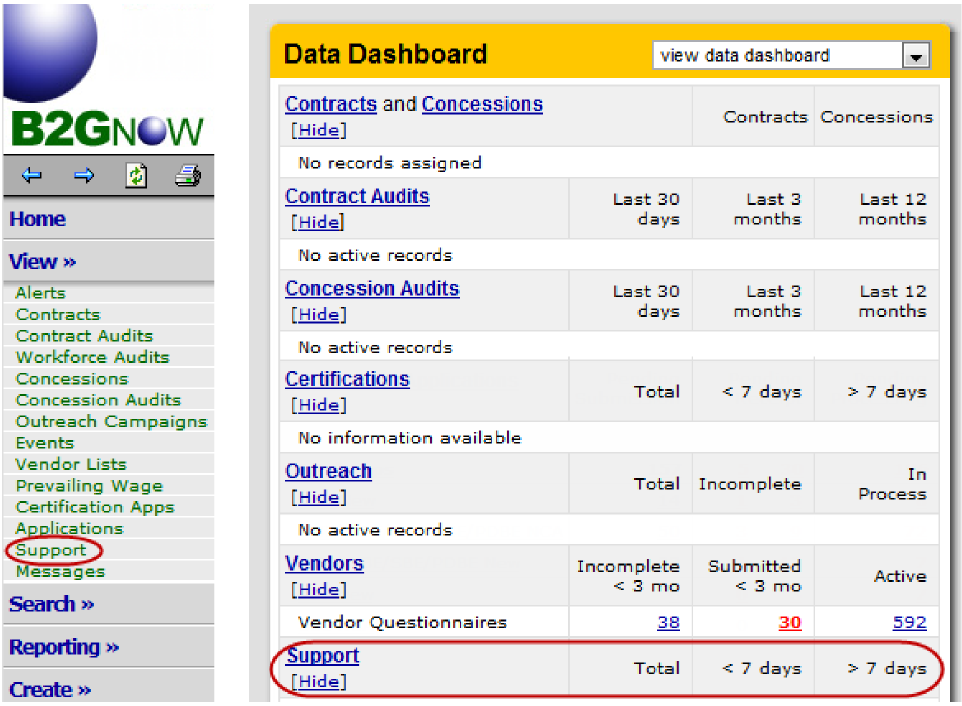
Viewing the Support List

Your organization's support queries display on the Transactions: Support List page. You can view ticket information, access tickets, filter the list to display specific tickets, search for tickets, refresh the list, and reset the filters.

You can view the Support List by logging in to your account with your user name and password.

To access the Support List page

1. Log in to your account.
2. Open the **View** menu, and then click **Support**; or click **Support** on your Dashboard.



The Transactions: Support List page displays all open tickets for the specified timeframe. Use the list to view pertinent information for each ticket, as follows:

Actions – All actions you can perform for the ticket.

Status – The current status for the ticket:

- Pending response – No one has responded to this ticket.
- Open – The ticket is open.
- Closed – The ticket was resolved and closed.
- Archived – The ticket was resolved, closed and archived.
- Spam – The ticket was marked as spam.
- Out of Office – The ticket was marked as an Out of Office response.
- Duplicate – The ticket was marked a duplicate of another ticket.

Account – The organization for which the ticket was submitted.

From – The name of the person submitting the ticket.

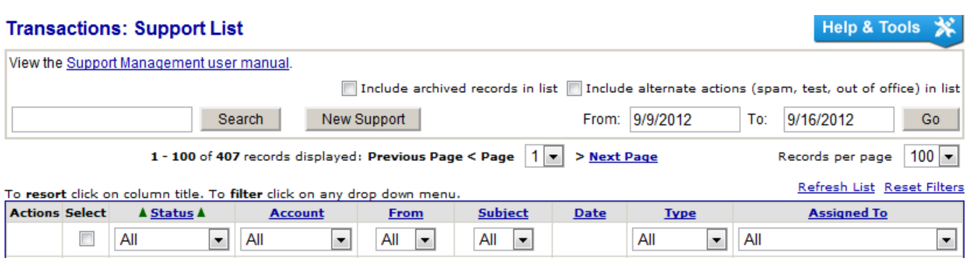
Subject – The ticket's subject.

Date – The date on which the ticket was submitted. Includes amount of time from receipt of ticket.

Type – The method by which the ticket was submitted:

- Online – The ticket was submitted from within the B2Gnow system.
- Portal – The ticket was submitted from your public portal.
- Email – The ticket was submitted to the customer support email address.
- Phone – The ticket was submitted to a support representative by phone.
- Fax – The ticket was faxed to a support representative.
- Letter – The ticket was submitted through the mail.
- In person – The ticket was submitted in person.

Assigned To – The person to which the ticket is assigned.



Filtering the Support List

You can customize the view by using the lists to filter the tickets by a specific value. For example, you can use the Assigned To list to view tickets assigned to a specific user. You can also search for a specific ticket.

After customizing your list, you can use the refresh option to view new tickets for the same filter, or you can reset the lists to return to the original view.

NOTE: While you are logged in, the list retains its settings every time you return to the page.

To filter the Support List

1. To view tickets for a specific date range, in the **From** and **To** calendars, select the dates, and then click **Go**.
2. To include the archived tickets or tickets marked as spam, select **Include archived records in list** or **Include spam in list**.
3. To change the number of records that display on each page, from the **Records per page** list, select the number.
4. To view tickets by status or support account, select the option from the **Status** or **Account** lists.
5. To view tickets submitted by a specific person or with a specific subject, in the **From** and **Subject** lists, select the letter with which the person's name or subject starts.
6. To view tickets submitted by a specific method, from the **Type** list, select the method.
7. To view tickets assigned to a specific person, from the **Assigned To** list, select the name.
8. To refresh your list, click **Refresh List**.
9. To return to the original view, click **Reset Filters**.

NOTE: The list is initially set to a time frame of the last week. If you cannot find a ticket but know that it exists, it may be due to an incorrect time frame, status, or account.

To search for a ticket

1. In the Search area, enter the item for which you want to search.
2. Click **Search**.
3. To refresh your list, click **Refresh List**.
4. To return to the original view, click **Reset Filters**.

NOTE: To search for a specific ticket, type the full ticket number.

Marking tickets as spam

If a support ticket gets past our spam filter, you can mark it as spam, which removes the ticket from the list unless you specify otherwise.

To mark a ticket as spam

1. Use the check box(es) to select the ticket(s) you want to mark as spam.
2. From the **Select** Action list at the bottom of the page, select **Spam**.
3. Click **Update**.

To unmark a ticket as spam

1. First select the **Include spam in list** filter option.
2. To locate the ticket through search, enter the value by which you want to search, and then click **Search**.
3. Click the **View** hyperlink for the ticket you want to unmark.
4. Click **Undo spam**.

Working with Support tickets

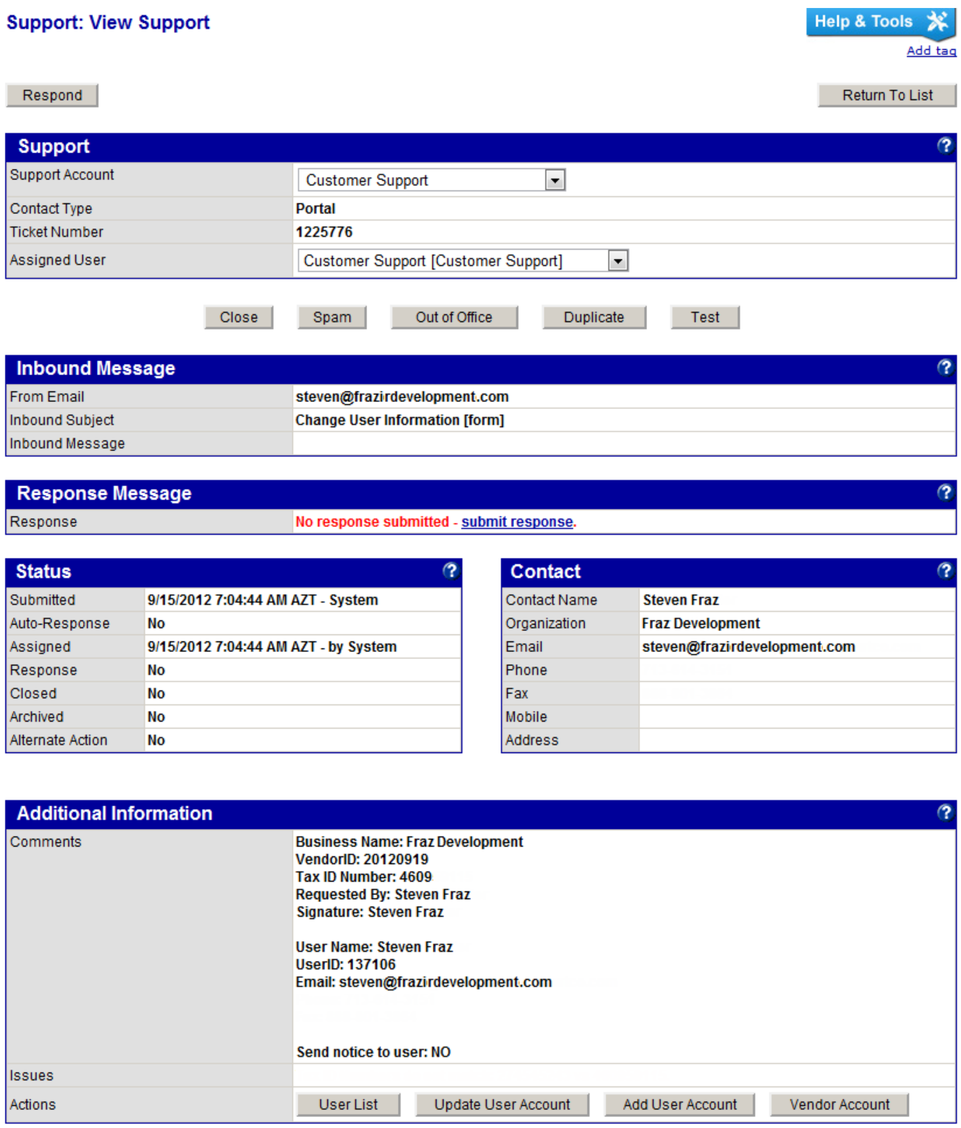
Once you find the tickets with which you want to work, you can view the full details for them, such as the full message and contact information. The message should include information about what the requestor needs assistance with, but if it does not, you can contact the requestor for additional information.

When you're ready to work with a ticket, first make sure it's assigned to you. Next, process the request. Depending on the type of request, it can take you a few minutes to process it or a couple of days. For example, resetting a customer's password only takes a few minutes, but merging accounts could take up to a couple of days.

When you're finished processing the request, use the respond function to reply back to the requestor. You can close and archive completed tickets as needed.

To view a ticket

- On the Support List page, click the **View** hyperlink for the ticket you want to open.



You can view information about the ticket, as follows:

Support – Lists support details, such as the account from which the ticket was submitted, the method used to submit the ticket, the ticket number, and to whom the ticket is assigned.

Inbound Message – Lists message details, such as the email account from which the ticket was submitted, the ticket's subject, and the full support request. File attachments may be present, in which case a **View Attachments** button will be visible.

Response Message – Lists response information if the ticket has been answered.

Status – Lists the ticket's status in the following areas:

- Submitted – The date on which the ticket was submitted and the name of the individual who submitted the ticket.
- Auto-Response – Specifies whether an automatic response was sent to the requestor.
- Assigned – Specifies the date on which the ticket was assigned and the source that assigned the ticket.
- Response – Specifies whether a response was sent to the requestor.
- Closed – Specifies whether the ticket was closed.
- Archived – Specifies whether the ticket was archived.
- Alternate Action – Specifies whether the ticket was marked with an alternate action, such as spam or as an Out of Office message.

Contact – Lists the requestor's contact information.

Additional Information – Lists additional information the requestor wanted to include, if any.

Responding to tickets

You respond to tickets to notify the requestor that you completed the request or when you need additional information.

When responding to tickets, be concise and professional and always check your spelling and grammar.

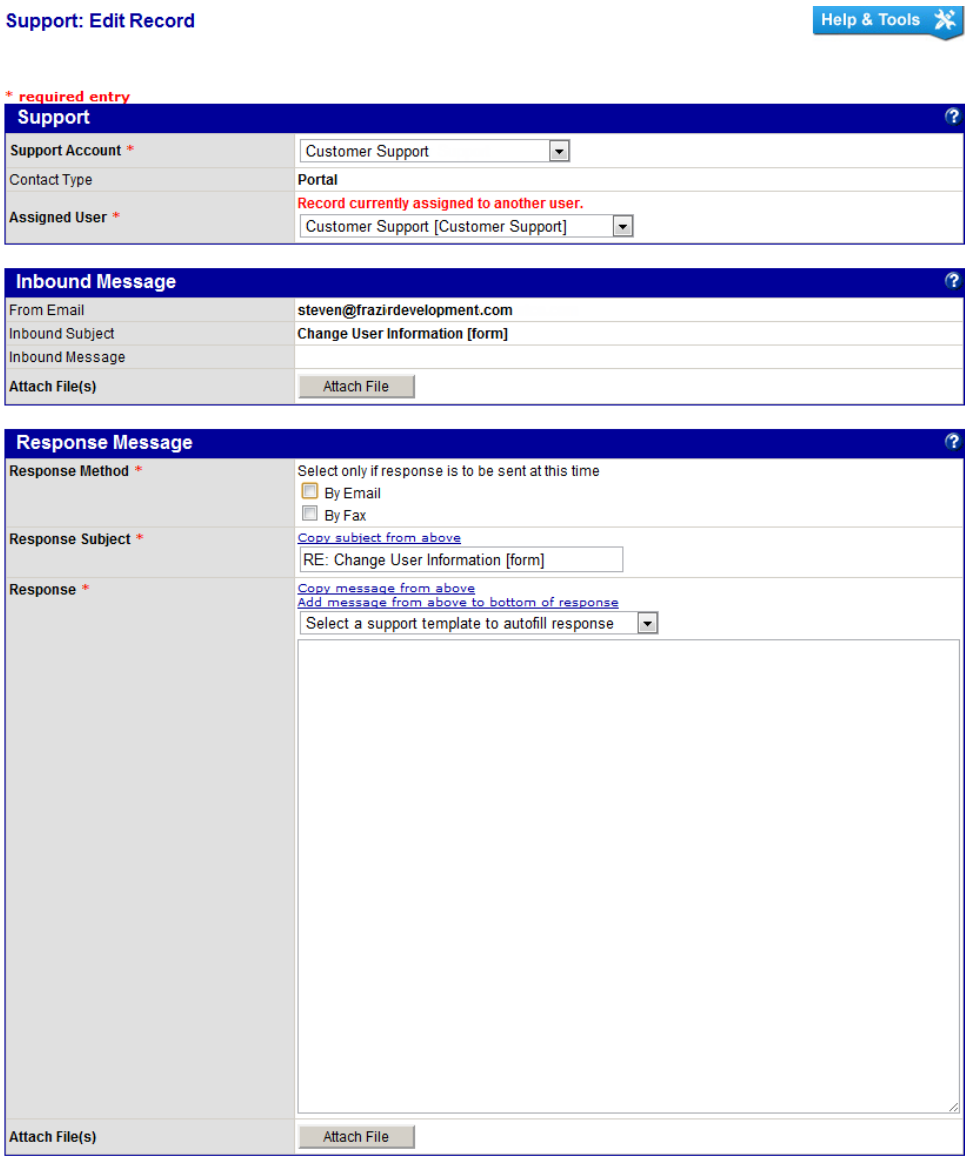
To respond to a ticket

1. Click the **View** hyperlink for the ticket you want to open.
2. If necessary, from the **Assigned User** list, select your name.
3. Click the **Respond** button or the **submit response** hyperlink.

4. In the **Response Message** area, select one of the **Response Method** options, as follows:

NOTE: The available options depend on the information the requestor provided. For example, if the requestor only included an email address, only the "By Email" option displays. The "By Fax" option is available only to organizations that have selected the fax service.

- **By Email** – Sends the response to the requestor's email address.
- **By Fax** – Sends the response to the requestor's fax number.



5. If necessary, in the **Response Subject** field, edit the subject.
6. In the **Response** area, enter your response. The original message is included and can be edited. Type your response at the top of the field.
7. You can attach a file by clicking **Attach File**.

8. The information displayed in the Contact area is based on one of two sources:
    a. **Contact <u>in</u> System**: The requestor is already in the system and full contact information is available. In this case, all data is auto-filled in the fields and displayed on the screen.
    b. **Contact <u>NOT</u> in System**: A match could not be found for the requestor. The name of the person and email address will be displayed, but additional information may not be available. This situation is usually due to a query from a person not in the system or a user is sending from an email address that is not assigned to any system user record.
9. If necessary, edit the contact information.
10. When finished, click **Review**.
11. Review the response, and then click **Save**.

NOTE: If the information provided by the requestor is insufficient, respond with a message for more information. When the requestor responds, by email, to your message, the system will usually recognize the ticket number and will “chain” the messages together. All messages in a chain share the same ticket number.

Closing and archiving tickets

You can track tickets and keep your support requests organized by closing and archiving completed tickets. When you need to view them, just select Closed or Archived from the Status list. You can also use these lists to track the number of tickets you processed.

To close a ticket

1. Click the **View** hyperlink for the ticket you want to close.
2. Click the **Close** button.

3. To archive the ticket, click **Archive**.

NOTE: You can click “Undo Close” to return the ticket to an Open status, or you can click “Undo Archive” to return the ticket to a Closed status.

Notification Alerts

The Support module sends out several different notifications in response to user actions.

- **Support query assignment** – when a support query is submitted and automatically or manually assigned to a user, the user will receive a notification.
- **Daily summary** – every day a summary of support queries assigned will be sent to each user.
- **Support query response** – when a response is entered to a support query, a notification of the response is immediately sent.