Freshdesk Ticket Handling Procedures

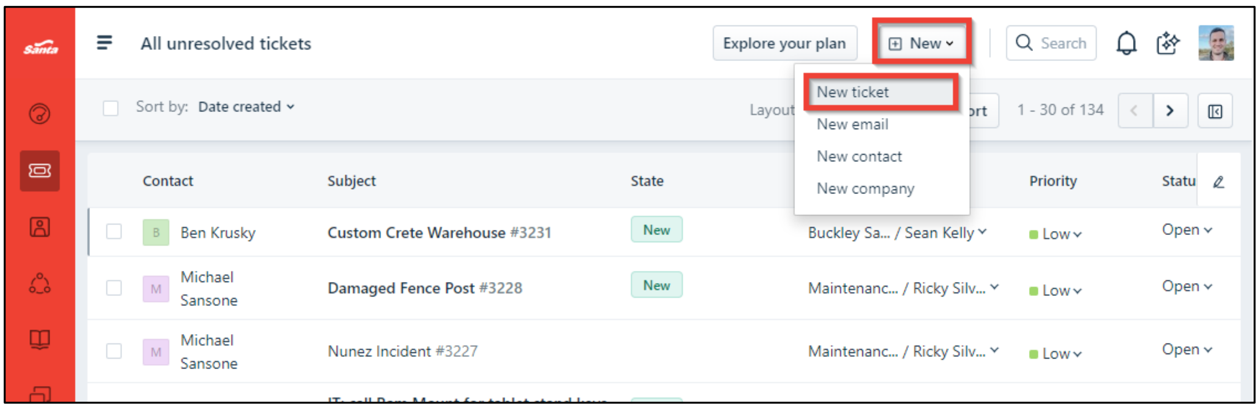
Freshdesk Training **Version:** 11.2.20 **ID:** SE-027

Abstract

This document will go through the protocol of handling tickets within Freshdesk in connection to Cargas and other departments in Santa Energy. The procedures written out in the document are to ensure precision to completing tickets and updating all of our systems with current information in the process.

Creating a New Ticket

To create a new ticket, you will start by selecting "New", in the top right corner of the screen, and then choosing "New ticket" from the dropdown.

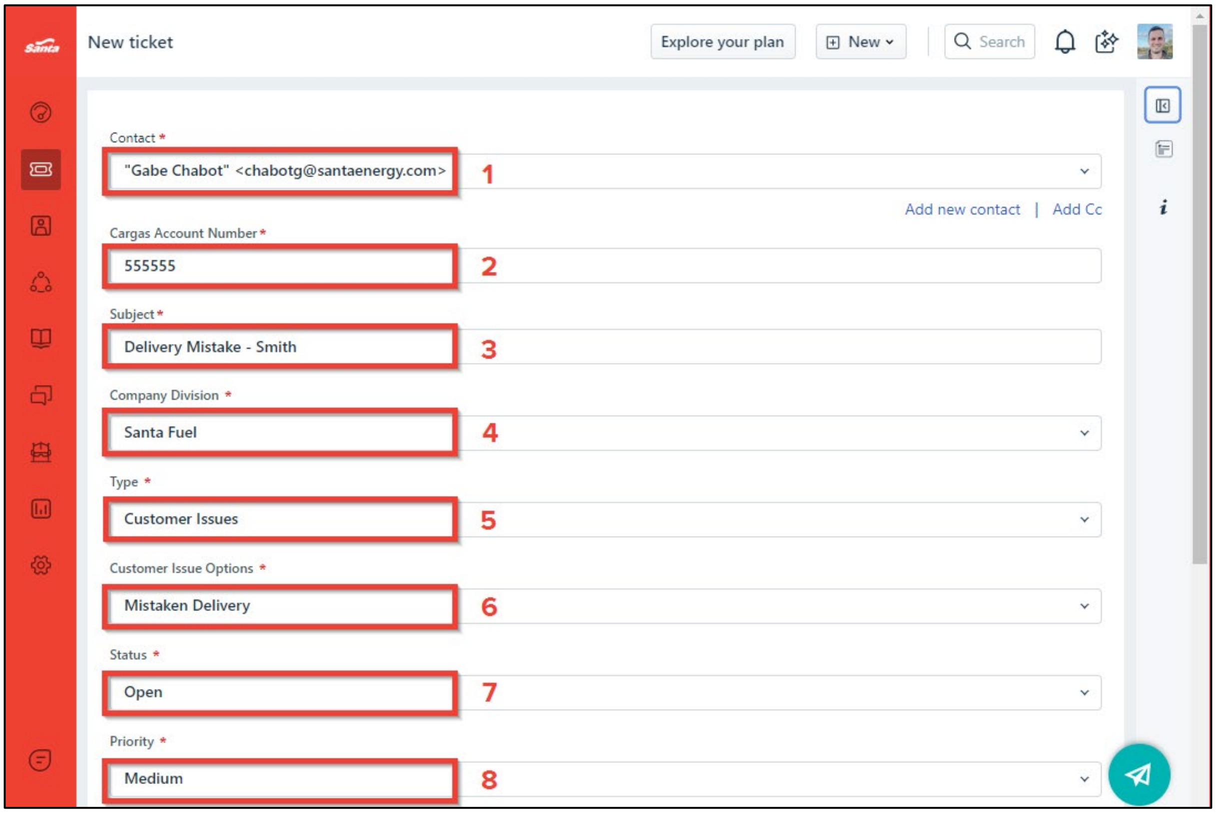


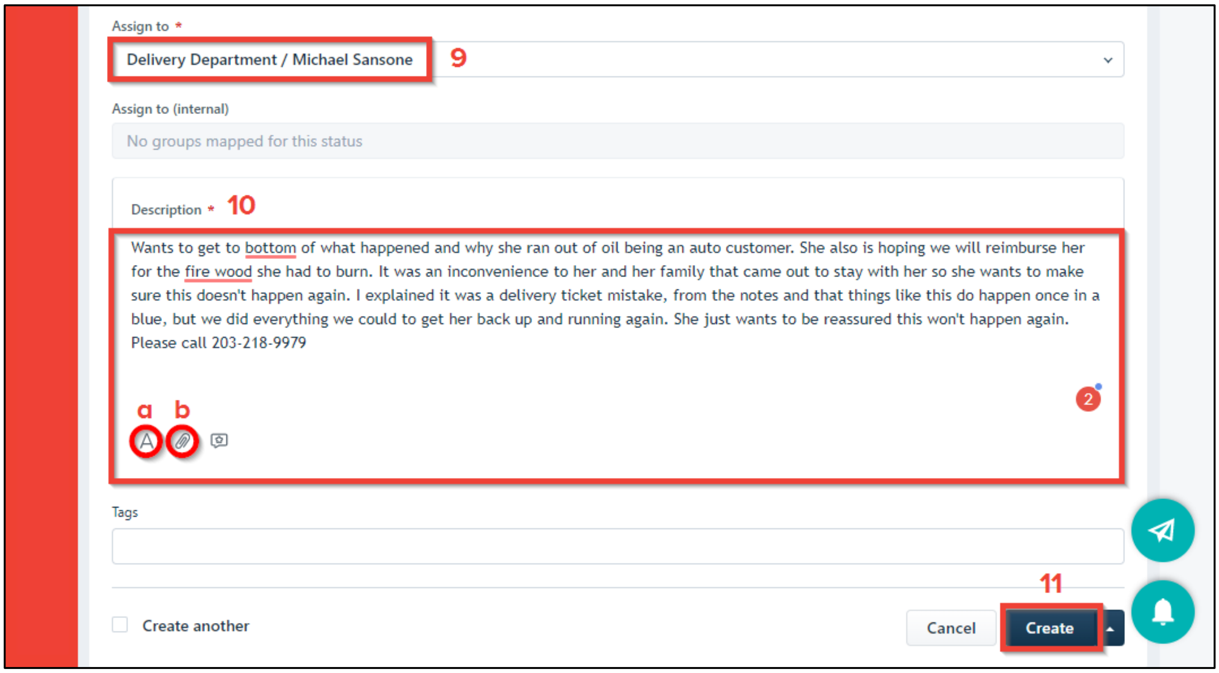
Next you will need to fill out your new ticket:

1. The contact will be whoever is creating the ticket. So if you are creating the ticket, **you are the contact.**
2. Enter in the Cargas Account Number if it is in relation to a current customer. If it is an internal request (Ex. IT ticket or Maintenance request) the Cargas Account Number would be "**0**" (zero).
3. The subject acts like the subject of an email. A clear title of the issue then the customer's last name or account number. (Ex. Delivery Mistake – Smith).
4. Enter the company division associated with the ticket (Santa Fuel, Servco, Buckley, Inland, or Santa Energy).
5. Choose a type that best fits the scenario of the ticket being created.
6. Select a secondary type that further refines the ticket's category.
7. The ticket will automatically be set to "Open" signifying this is a new ticket that now need to be worked on.
8. Set the Priority to a reasonable level of urgency. **Remember** that Priority levels connect to a Service Level Agreement, which determines how quickly a ticket needs to be resolved. For example, a Low priority would need to be resolved within 4 business days, whereas a High priority ticket would need to be resolved within 6 hours.
9. Select the Group and Person you are going to assign the ticket to. You are **required** to select a person to assign the ticket to before creating a ticket. This is to ensure someone is always attached to the ticket and responsible for moving it to resolution.
10. Now enter in a description that fully captures the issue needing to be resolved in order to better help the assignee address the problem.
    a. You can change the formatting of the description if need be.

   b. You can attach a file to the ticket in order to more thoroughly describe the situation.

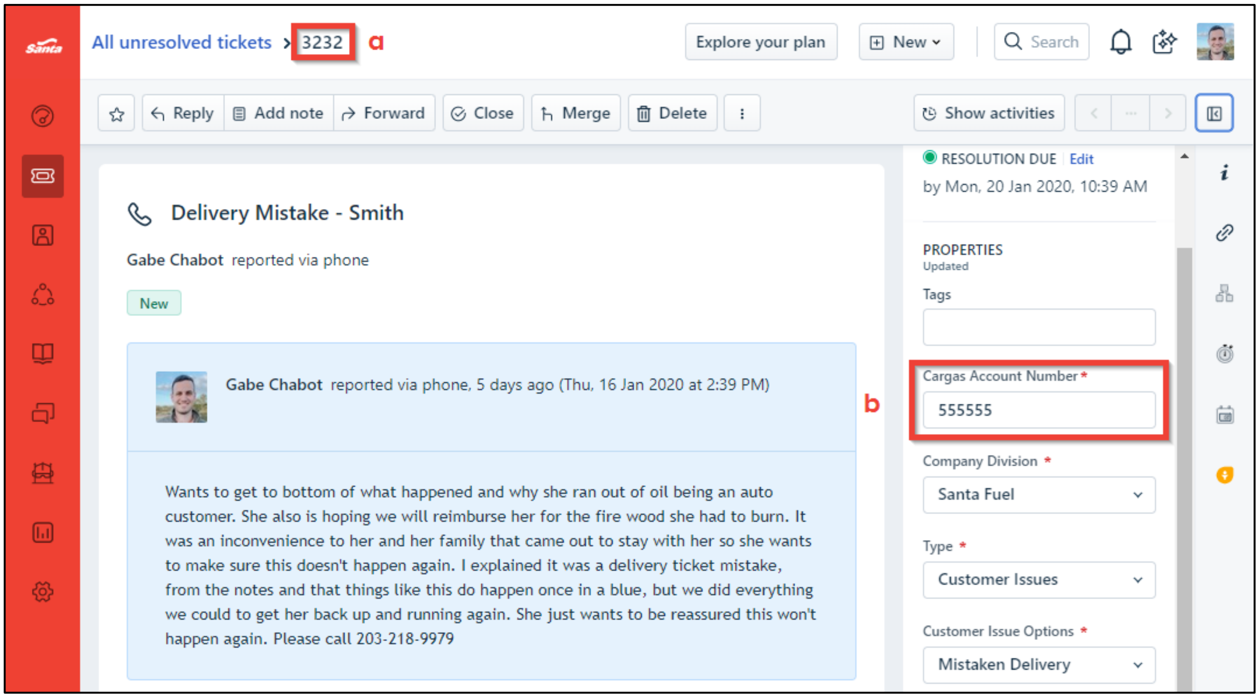
11. Check over the ticket to make sure all the information is inputted correctly, and then select "Create" at the bottom of the screen.





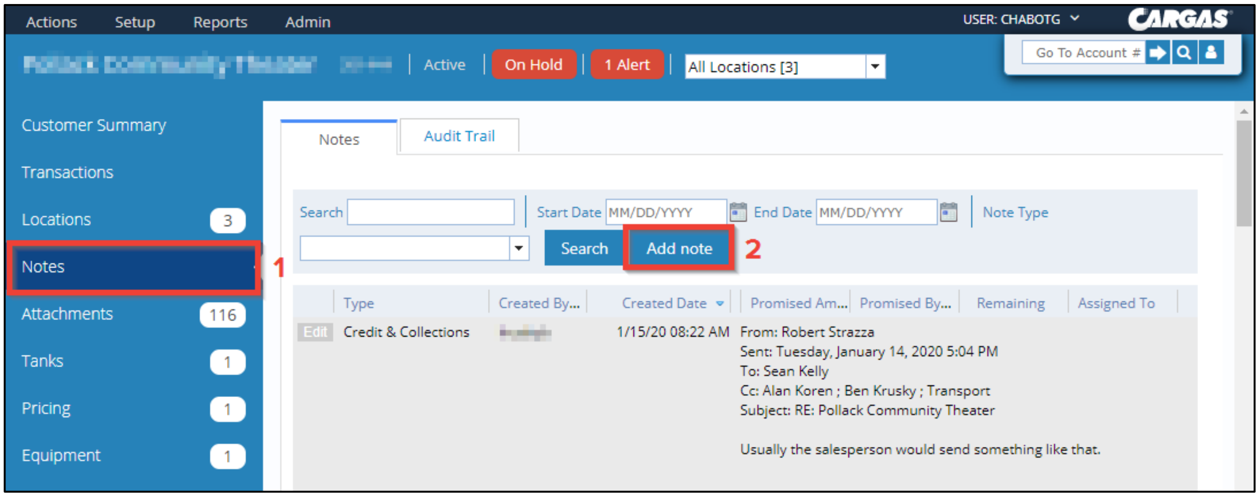
Updating Cargas

Once you've created the ticket, you will automatically be brought to the newly created ticket. From here you will need to copy the ticket number (a) and then go to the customer's account (b) in Cargas.

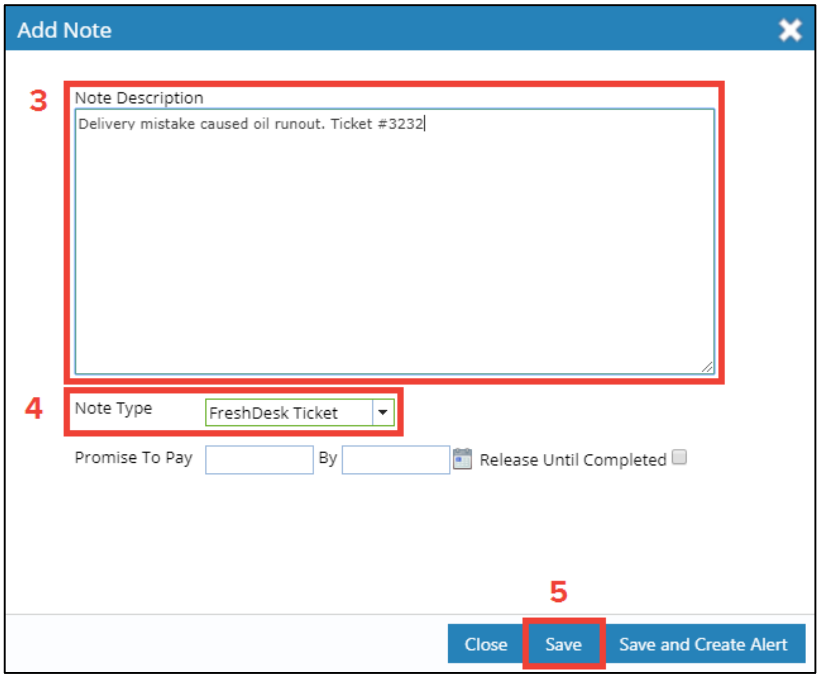


Once you've opened the customer's account in Cargas:

1. Go to the Notes tab on the left hand side.
2. Select "Add Note"



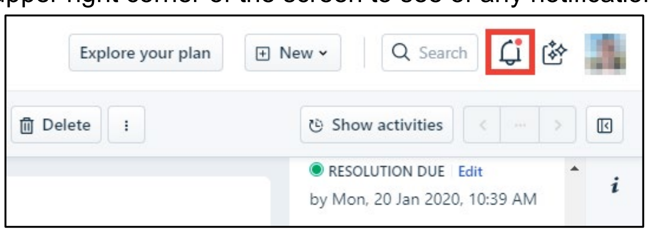
3. Add a note in the "Note Description" section that quickly identifies the issue being tracked followed by the Freshdesk ticket number (For Example: Ticket #3232).
4. Select "FreshDesk Ticket" as the Note Type.
5. Click "Save" when done.



NOTE:
This is the only time you will need to go into Cargas and notify the system of the Freshdesk ticket. It's important that whenever a ticket is created, Cargas is notified, so that someone working out of Cargas is aware of issues being worked on for the account.

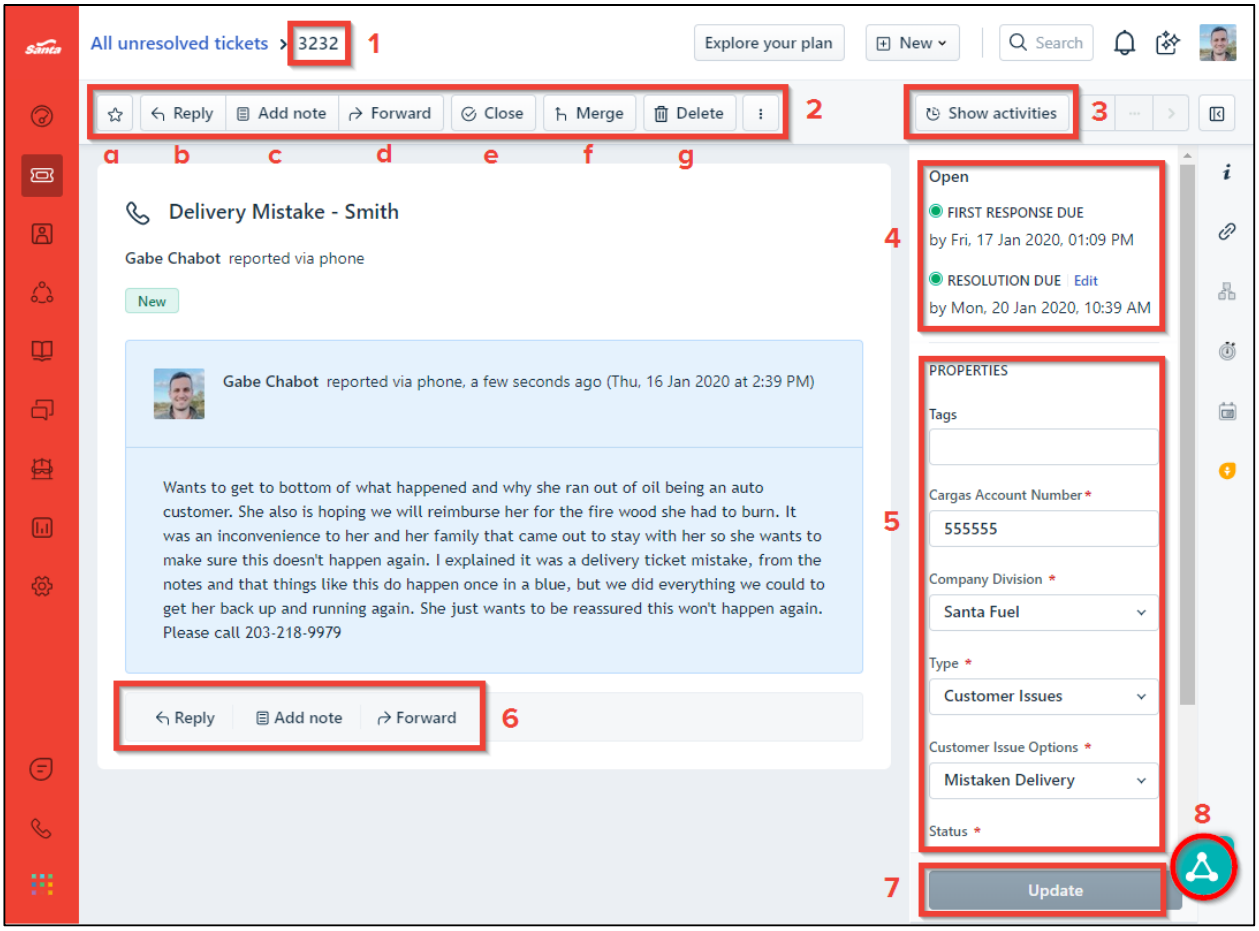
Working on a Ticket Assigned to You

When you are assigned a ticket, you will first receive an email notification of your new ticket. You can also look in Freshdesk at the upper right corner of the screen to see of any notifications you receive.



1. When you are assigned a ticket you can first see the ticket number associated with the ticket.
2. At the top of the screen is your quick access toolbar:
   a. You can select the star icon to "watch" a ticket and be updated as progress is made to it.
   b. You can Reply to the Contact of the ticket (the person who created the ticket)
   c. You can add a note to the ticket (used to note any activity or progress made)
   d. You can forward the ticket along to someone outside of Freshdesk (like forwarding an email)
   e. You can close the ticket (**be sure to have final notes describing the actions taken to close before selecting)**
   f. You can merge this ticket with another ticket if they are dealing with the same issue
   g. You can delete the ticket (**this should not be done unless given permission by supervisor**)
3. This is where you can view all the changes made on the ticket (like an audit log)

4. Here is the Service Level Agreements associated with this ticket. The “First Response” relates to you replying to the Contact who made the ticket. The “Resolution Due” is when the ticket needs to be resolved by.
5. This is the properties section of the ticket where you can find the Cargas Account Number, Company Division, Ticket Type, Status of ticket, Priority level, and who the ticket is Assigned to.
6. These are your communication tools with the ticket where you can either Reply, Add note, or Forward. When adding a note, you can “CC” other agents to include them in on the conversation.
7. After any changes are made to the ticket, be sure to select “Update” to save your work.
8. As a bonus feature for us, the blue icon in the bottom of the screen is our chat option to further discuss a ticket with other agents, and have that conversation not embedded in the notes.



NOTES:
If you are assigned to the ticket, it is your responsibility to move it along and bring it closer to resolution. The Service Level Agreements are in place to ensure quick turn overs of issues. You can reassign a ticket but should always provide clear notes as to the status of the ticket and what’s been done. Remember that all actions are tracked on the ticket, so be sure to clearly dictate any changes so as to provide clear information behind *why* changes were made.

Resolving a Ticket

If you are the final responsible agent on the ticket and the issue has been resolved, you can then resolve a ticket. **Before you set a ticket status to "Resolved" follow these steps:**

1. Make a final note on the ticket to describe your final steps in bringing the issue to resolution.
2. Set the Status of the ticket to "Resolved."
3. Select "Update" to save the ticket and set the status.

NOTE:
Be sure to check and make sure all information is properly filled out, and that anyone looking at this ticket outside of the situation would be able to clearly understand all that occurred.