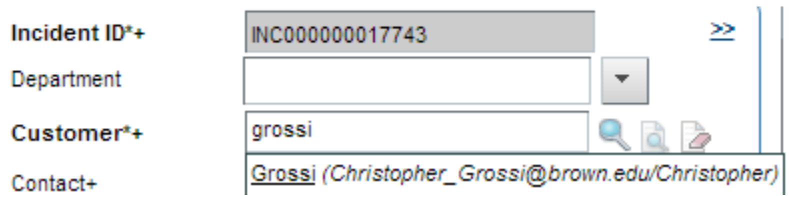
Incident Quickstart Guide

Ticket Fields

For a New Ticket

1. **Who?** Find the customer by typing their last name into the Customer field. No need to enter a Contact unless someone else needs to be notified.



2. **What?** If at all possible, use a template. In the Template field, type a keyword (such as “wireless”). The list will be filtered - choose the correct template. This will prefill other fields like Summary, Service, Importance. If there isn’t a template, you will need to fill these all in manually.

3. **When?** Fill out the Target Date field - this is the future time at which the customer needs the ticket complete, or the expected turnaround for completion of a typical similar Incident.

4. **The Details.** If using a template, the Notes field will have specific questions that you should ask the user. If not, provide as much information as possible.

5. **Assignment.** Templates will automatically assign to a group. If not using a template, choose a group manually, but in either case do not assign to an individual (only the group).

Adding Information

- To add information, use the **Work Entries** on the right side
- If you need to send information to the customer, use the Function > **Email System** link on the left. *Make sure to leave the ticket number in the subject line!*
- If the customer replies to a notification email, it will automatically be added to Work Entries. You can also reply to emails to update the ticket.

Ticket Lifecycle

Claiming a Ticket

If you are assigned a ticket or find one that you should take, you need to claim it by setting the status to “In Progress”

Pending

You might want to change the status to Pending if you are waiting for the customer or a vendor, or the incident does not need to be resolved until a point in the future more than a week away.

All Done!

When you believe the incident is fixed, change the status to Resolved by using the Next Stage->Incident Closure menu from the top bar. *Note that the customer receives the text you type in the Incident Resolution field when the Incident is resolved, so make sure the text is customer-friendly.* The customer will receive a notification saying that they can reply to update their ticket if they still need help, and the ticket will automatically close in 10 business days. Never set the status to Closed - closed tickets can never be reopened.