

Categories

Categories can be used to label and organise Tickets by one of multiple options under a main header.

For example:-

Query Type: General, Sales, Support or Complaint

Categories can be added and edited by going to: Settings -> Ticket Attributes -> Categories.

The screenshot shows the Puzzel dashboard with a navigation menu at the top. The 'Settings' menu is open, showing options: General, Ticket Channels, Productivity, Ticket Attributes, and Integrations. The 'Ticket Attributes' menu is further open, showing 'Categories' and 'Tags'. Below the menu, there is a table titled 'Categories' with the following data:

Name	Available Choices		Actions
complaints	choice 1, choice 2	No	Edit Delete
Complaint type	resolved, spam	No	Edit Delete
Test		Yes	Edit Delete

Select “+ New Category” to create a new Category, or **Edit** for the Category you wish to change and update.

The screenshot shows the 'Category Details' form. It has a 'Name' field with the value 'complaints'. There is a checkbox for 'Allow Manual Entry' which is currently unchecked. To the right, there is a section for 'Category Choices' with two input fields: 'choice 1' and 'choice 2', each with a red trash icon. Below these is a green button labeled '+ Add Category Choice'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Name the Category and specify category choices for each category. Any number of category choices can be added by selecting the “+ Add Category Choice” button.

'Allow Manual Entry' allows a Category to be set without a category choice. This would normally be used where the information to be captured is unique, for example an invoice reference. These are known as Free Text Categories and work in the same way as categories save for the lack of choices.

Select “**Save**” to add the Category or changes.

Once a Category has been created, it can be hidden from Teams if not relevant, or set to be a required Category in order to Resolve a Ticket by setting it as a “**Force Category Choice to Resolve**”. This can be found under the Team Settings page when editing a Team[Settings-> General-> Teams and click on **Edit**]

Categories

Hide Categories

Force Category Choice to Resolve

No. Required

For example, Categories relevant to only the Sales Team can be hidden from the Support Team and the Support specific Categories can be set as **"Force Choice to Resolve"** for the Support Team to ensure that information is always given for Support tickets.

The screenshot shows the 'Ticket #29' interface. The 'Attributes' panel is expanded, and the 'Categories' section is highlighted with a red box. The 'Categories' section contains the following fields:

- complaints:** choice 2
- Complaint type:** --Unassigned--
- queries:** --Unassigned--
- Tags:** (empty)

Other visible fields in the 'Attributes' panel include:

- Team:** Sales
- Assigned To:** Jayanthi Kumar
- Priority:** Normal
- Status:** Resolved
- Post-it Note:** (empty)

At the bottom of the 'Attributes' panel, there is a green 'Save' button.

Categories can be applied to a Ticket from the Attributes panel when viewing a Ticket. Select the relevant Category choice under the Category header and select **"Save"** to add and update the Ticket attributes.

A filter can be added to Include or Exclude specific Category choices in the reports. Each choice must be selected separately to report on an entire Category.

The screenshot shows the 'Create Report Builder' interface. The 'Filters' step is selected, and the following options are visible:

- Time Period:** This year
- Filter Type:** Include
- Filter Name:** Users
- Filter Value:** (empty)
- Filter Action:** + Add a filter

A dropdown menu is open, showing a list of users:

- Agent 1
- Alle Desrevaux
- Andreas Wallin
- Christian Thorsrud
- Danish
- Finnish
- Harald Bakken
- Jan Rygh
- Jayanthi Kumar
- Jostein Jose Lund

At the bottom left, there is a red 'Previous' button.

Tickets can be searched for by the Categories and Choices applied to them from the Tickets page. Select the **Categories** tab on the **Tickets Attributes** panel to show the Category search options.

Ticket Attributes Categories

Search by Categories

complaints: Complaint type: queries: Test:

--Any-- --Any-- --Any--

Submit

A red "!" icon is displayed on the Categories tab when categories are being searched for even if you return to the main "Ticket Attributes" tab.

puzzel. Dashboard Tickets Reports Activity Customers Campaigns Settings Help

Ticket # + 55 JK

Ticket Attributes Categories !

Search by Ticket Attributes

Teams: Users: Status: Priority: Time Period:

Any Any Any Any All Time

Channel Type: Channel: Tags: Created: Last Activity: Read/Unread:

Any Any Any Any Any Any

Search: Search All

Submit