

## Puzzel Ticketing Admin Guide

This section describes the role and responsibilities of an administrator in Puzzel Ticketing. Administrators are essentially agents with additional privileges of managing and customizing Puzzel Ticketing for a tenant. If you are an admin, you can be assigned tickets like any other agent, but will also be the default settings allow:

- Access all tickets (not just the tickets you are assigned to)
- Create/edit new business rules
- Add and manage end-users, agents, teams and administrators
- Promote agents to the administrator role
- Define system and team roles
- Create customer contact information
- Create/edit standard reports
- Build customized reports

Please note that default permissions can be changed for all User types to provide the control necessary in a specific organisation.

### Pre-requisites

Puzzel Ticketing requires an email account, to which emails are received and then these are forwarded to the application. If you are using social channels, you must have set up accounts with the providers and then configured these in the application. DNS records must be updated for Puzzel Ticketing to send emails as if from your domain.

Browser requirements:

- Google Chrome v. 19 and higher
- Mozilla Firefox v. 10 and higher
- Microsoft Internet Explorer 7 and higher

## Login and user access

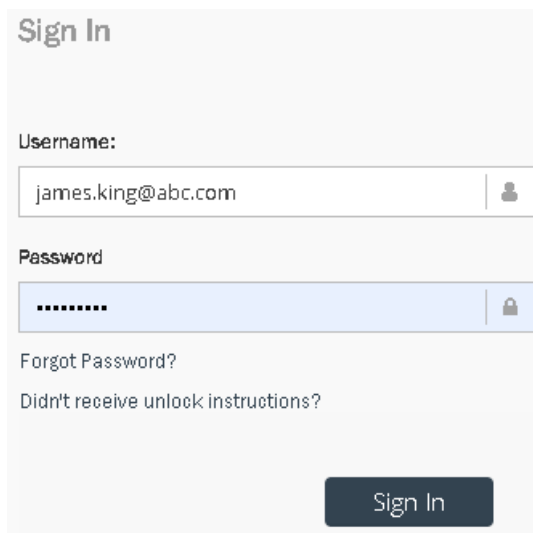
### Logging on in a standalone solution

Puzzel Ticketing is available through your Internet browser and the URL to your solution will be provided to you during implementation. For example: [www.product.logicalware.com](http://www.product.logicalware.com).

To be able to login into the application, you will need user credentials. The Puzzel implementation team will do the initial configurations for the services subscribed by your organisation and provide admin credentials for you. You can then create agents and additional admins as required.

### Signing in to Puzzel Ticketing

Open the application in the browser and enter the user credentials and click on **Sign In**.

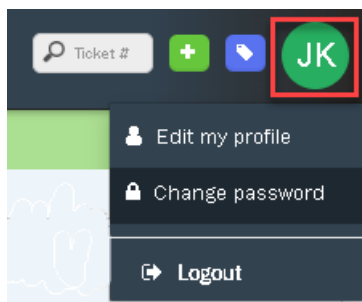


The image shows a 'Sign In' form with the following elements:

- Sign In** header
- Username:** Input field containing 'james.king@abc.com' and a user icon.
- Password:** Input field with masked characters and a lock icon.
- Links for 'Forgot Password?' and 'Didn't receive unlock instructions?'
- Sign In** button

If you have forgotten your password and wish to reset it, click on **Forgot Password**. and follow the instructions. This is possible only if you are already registered with your email address.

If it is the first time you are logging in, do not forget to change your password. To change the password, click on your name on the top right corner of the screen as shown below and select **Change password**.

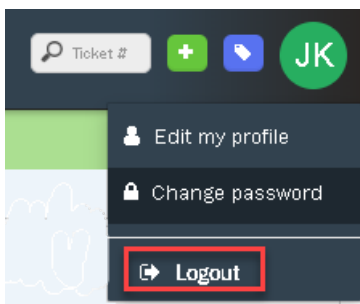


The screenshot shows a browser window titled "My Password". Below the title bar, the text "Change Password" is displayed. A dashed horizontal line separates the title from the form. The form contains three input fields: "Current Password", "New Password", and "Confirm New Password". Each input field has a small lock icon on its right side. At the bottom right of the form area, there is a dark grey button labeled "Update".

Enter the current and new password and click on **Update** to save it.

### Logging out

To log out of the application, click on your name on the top right corner of the screen and select Logout.

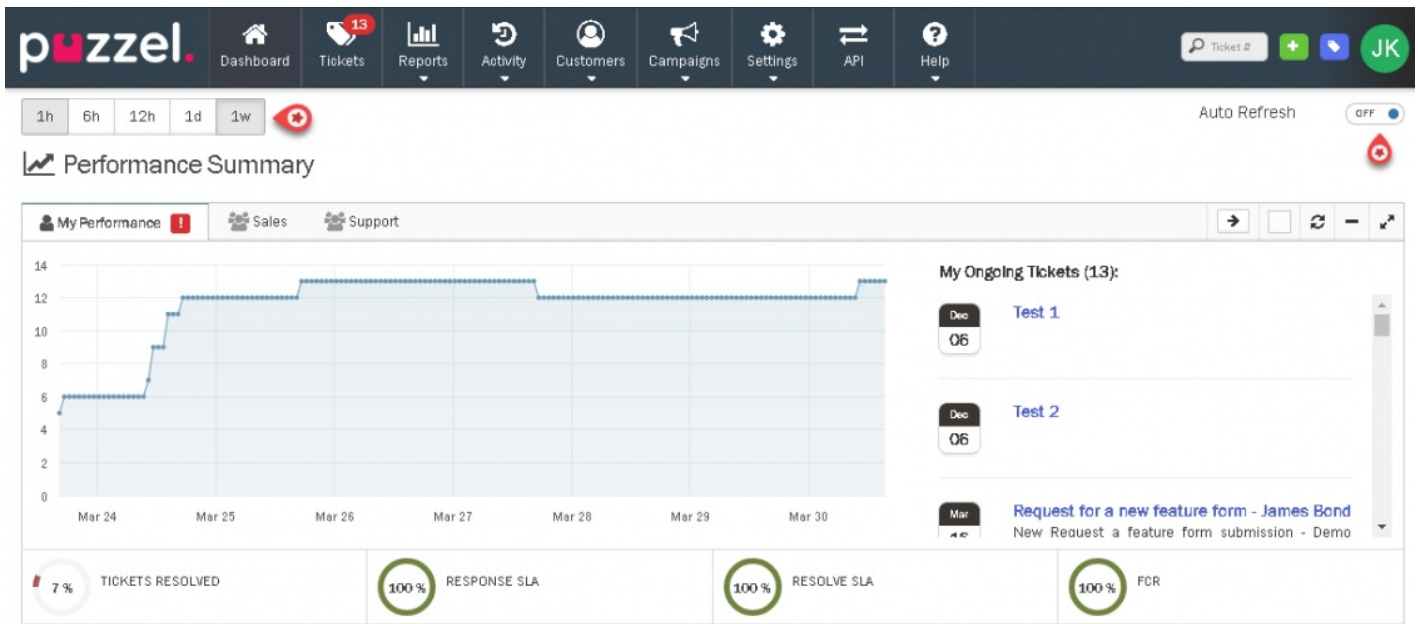


## Using the dashboard

The dashboard displays the overview of your/team performance and activity for a period of time. The graph shows for the period chosen from the options at the top of the screen. You can set the dashboard to refresh automatically using the toggle button on the right-hand corner of the screen. You can also view your Open Tickets, collect Unassigned Tickets from your Teams, and create a To-do list from the Dashboard.

### Performance Summary

The Performance Summary shows a graph of the number of Unresolved Tickets you have access to.



#### Note

The Dashboard is only available to Users with access to Dashboard under their System Role. Only information for Tickets assigned to Teams you are a member of will be shown in your Dashboard.

The three sets of data [graph, ongoing tickets, and status bar] captures your's/team's performance in Puzzel Ticketing and how you need to be actioning at the moment. The tabs on the top of the graph allow you to view performance for each of your Teams. The graph indicates user's [individual/team] performance over a period of time based on the tickets they have been assigned. On the right, is the list of available tickets that are already assigned to you. You can click on the individual ticket to see ticket details.

#### Note

You can hover over points on the graph and any red markers shown on your Team tabs or Performance stats for more information.

At the bottom, is the list of different statuses available to gauge the performance of an individual or team. A measure of response and resolution times ensures that you are delivering measured and agreed service to your customers. You and your agents can monitor your service level performance and promptly meet your goals as agreed. You can hover over points on the graph and any red markers shown on your Team tabs or Performance stats for more information.

### Tickets Summary

Further down you will find several widgets displaying a summary of your tickets. **Open Tickets Age** widget indicates the number of open tickets as new as <1 and older than 5hrs. **Tickets waiting in your teams** widget shows how many

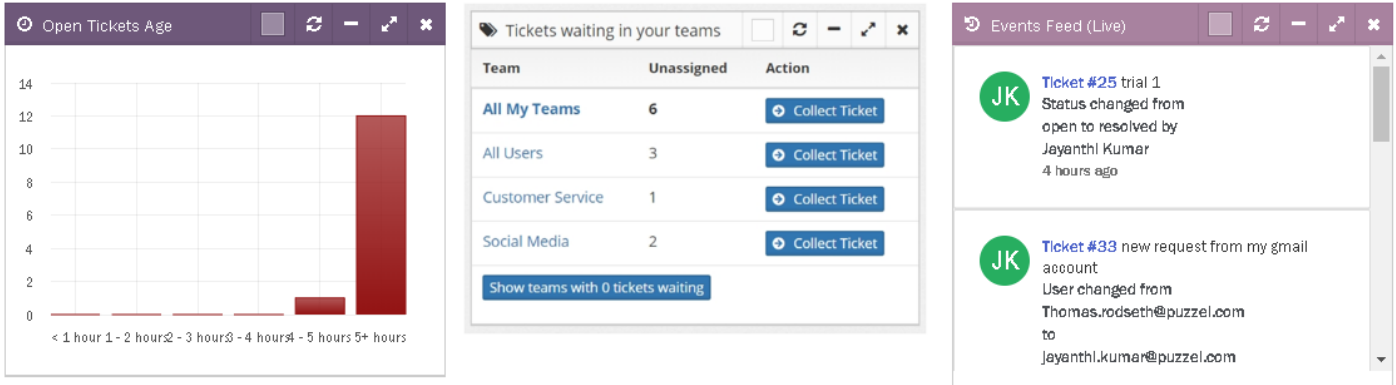


unassigned tickets are there for each of my team. You can collect unassigned tickets by clicking on **Collect Ticket button**.

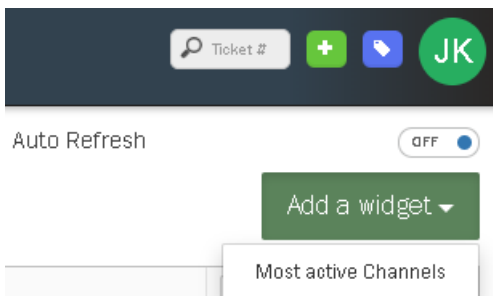
Along with these is the **Events Feed** widget that displays the changes happening to all the assigned tickets. This only includes Tickets you have access to. You can view the ticket details by clicking on the ticket number at any point of time.

There are other widgets that also help in understanding the number of users that are online, the user who has been most active and the channel through which most requests are coming through. These widgets can be minimized, maximized or removed as required.

## ☰ Tickets Summary



However, they can be brought back into the dashboard if required, by clicking on the Add a widget button on the top right corner and selecting the widget you want to restore.



### Note

You are not allowed to remove the Performance Summary widget.

## Overview

### To Do

In the overview section of the dashboard, agents can create a to do list for themselves to get a view of what tasks they are getting on with and be able to manage their work more efficiently. The tasks can be marked as done by clicking on the check box against it which will then move the task under Completed Tasks. All Completed Tasks will be removed from your Dashboard everyday at midnight.

To Do + New Task

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**⚠ Critical Tasks (0)**

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**! Important Tasks (2)**

**Ticket 11 - Jay - have you created the accesspoint in puzzel Admin? and if so I do not see any queue config.. i.e. xml needed with the queueKey. Let's have a chat when you are free** [\[Edit\]](#)  
Reminder set: 10:00 AM 16.12.2019  
Sun, 15 Dec 2019 21:02:43 CET

**Ticket 26 - Please call back teh customer on 0998765456** [\[Edit\]](#)  
Reminder set: 01:15 PM 25.03.2020  
Tue, 24 Mar 2020 14:16:16 CET

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**✓ Completed Tasks (1)**

~~**Ticket 29 - make a call back to the customer on 0087765**~~ [\[Edit\]](#)  
~~Reminder set: 02:00 PM 25.03.2020  
Tue, 24 Mar 2020 15:00:05 CET~~

**Follow up Calendar**

A follow up task for yourself can be created here or in the ticket itself. These are also displayed in the calendar on the right for greater visibility. You will be taken to the details of the ticket on clicking the calendar entry.

Task Follow-Up Calendar

September 2019 Today Showing < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2 11:00am Call back Customer	3	4	5	6	7
8	9	10 1:15pm Print off copy	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

To create a new follow up task in the **To Do** section, click on the drop-down arrow next to **New Task** option and select **New Follow-Up** task.

To Do + New Task

**⚠ Critical Task** New Follow-Up Task

Enter all the required details in the **New Follow-Up** Task screen. While Title of the task, date and time are mandatory fields, description of the task and attaching a ticket to the task is left to user discretion.

## New Follow-Up Task



Follow up task

Call the customer

23 - test ticket

01.04.2020

8:47 AM

Cancel

Save

Click on **Save** to add an entry in your calendar. A reminder will be set for the time of the task which will prompt for a task to be done.

To do the same when you are viewing the ticket details, click on button in the **Timeline** section and enter the details before clicking **Save**.

Timeline

Timeline Options

Test 30-03 via ticket Cancel Save

just now

Comment/Note:  Users:  Follow-up date:  Follow-up time:

Mar 31, 2020 @ 10:44am

Follow-Up Task added to Jay kumar by Jayanthi Kumar

Mar 30, 2020 @ 11:18am

From: [jayanthi.kumar@puzzel.com](mailto:jayanthi.kumar@puzzel.com)  
To: [ticket@product.logicalware.com](mailto:ticket@product.logicalware.com)

## Customer Management

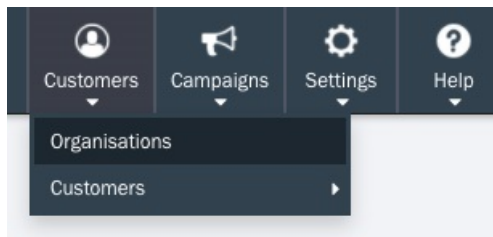
This section contains article about creating and managing customers.

- [Adding new organisation](#)
- [Adding new customers](#)
- [Checking customer record](#)
- [Retention Period & Automatic Deletion](#)
- [Customer Data](#)

## Adding new organisation

Organisation is a clever way of grouping tickets/customers. For example if your email is from puzzel.com we can use organisation to know that you belong to Puzzel.

To create an organisation, go to Customers -> Organisation in the main menu

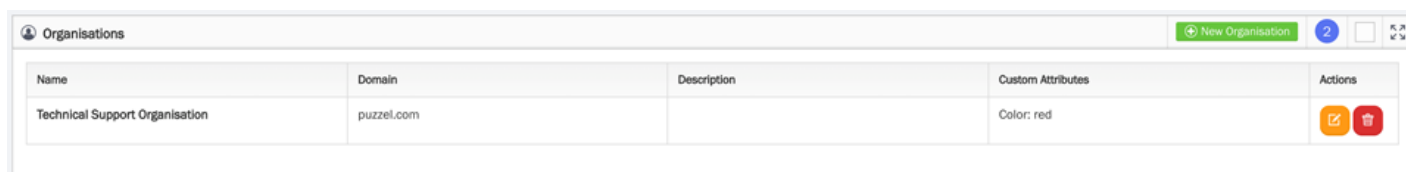




Click on **+ New Organisation** button found at the right hand corner of the panel. Fill out the forms in the **New Organisation** page then click save.

A screenshot of the 'New Organisation' form. It has a 'Name' field, an 'Email Domains' field with a sub-field for 'Domain', and a 'Description' field. On the right, there is a 'Custom Attributes' section with two input fields: 'Name' and 'Value'. A green '+ New Organisation' button is visible in the top right corner of the form area. At the bottom right, there are 'Cancel' and 'Save' buttons.

- Name – Name of your organisation
- Email Domains - domain name of your organisation. (ex: puzzel.com)
- Description - Description of your organisation
- Custom attributes - custom attributes of your organisation

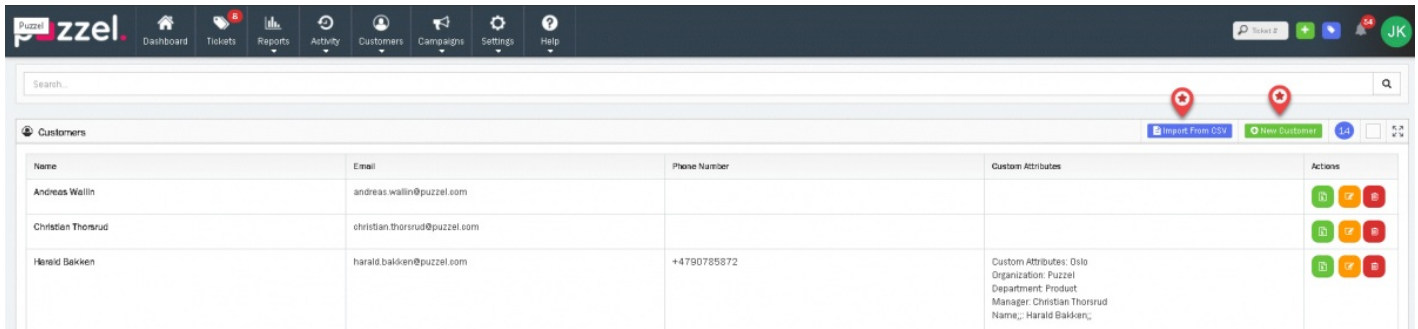
After clicking save, You will now see the organisation you just added to the list.




Name	Domain	Description	Custom Attributes	Actions
Technical Support Organisation	puzzel.com		Color: red	 

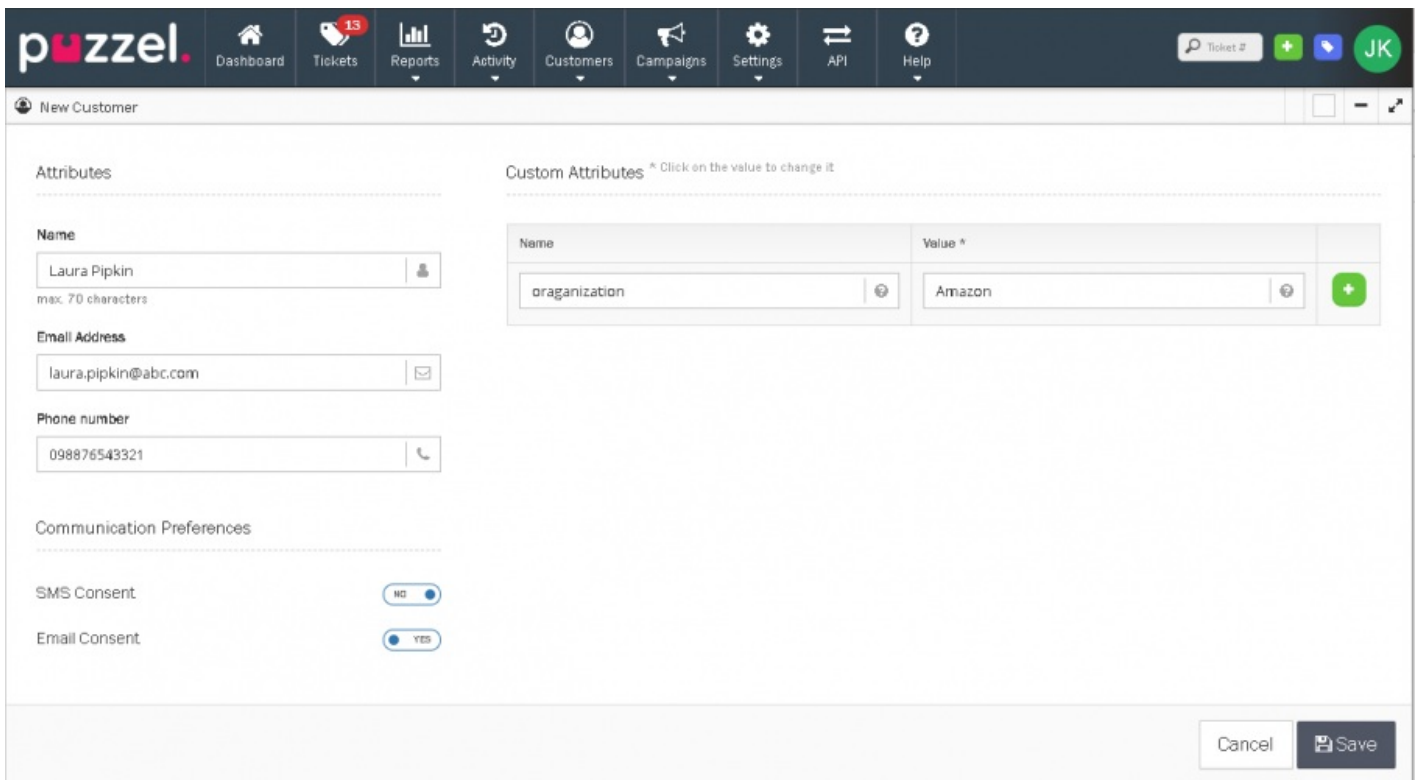
## Adding new customers

Customers can be added one at a time, or through bulk import of users, and also when a new customer submit requests for the first time. Select **Customers** in the top menu and choose **Active** and a list of all active customers will be displayed.



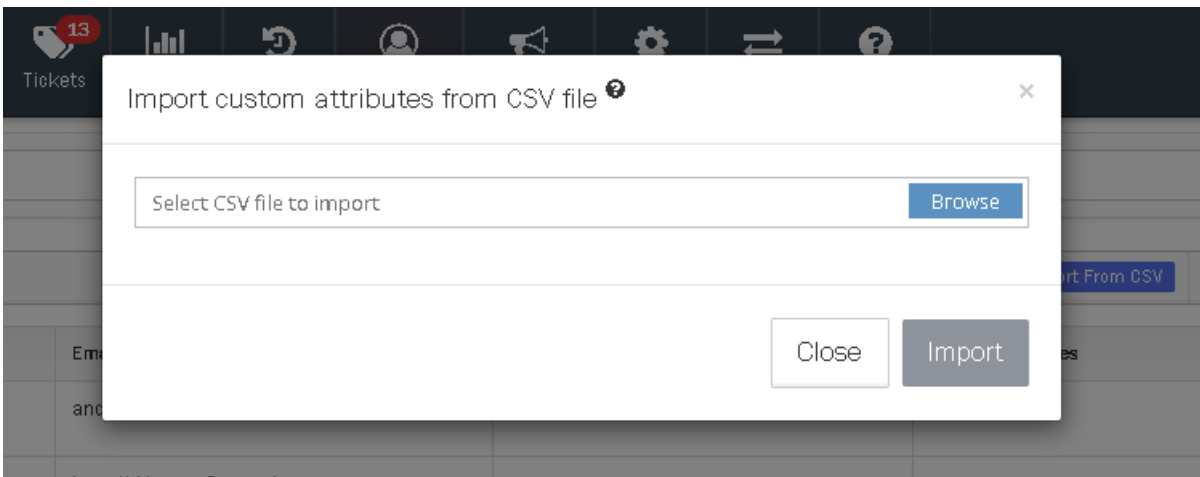
### Adding customers one at a time

Click on New Customer option as shown in the figure above to open a window for entering customer details and click **Save**. Along with the obvious entries, you can also include custom attributes such as organization, role, department so on and so forth. For adding more attributes, click on the  icon.



### Bulk import of customers

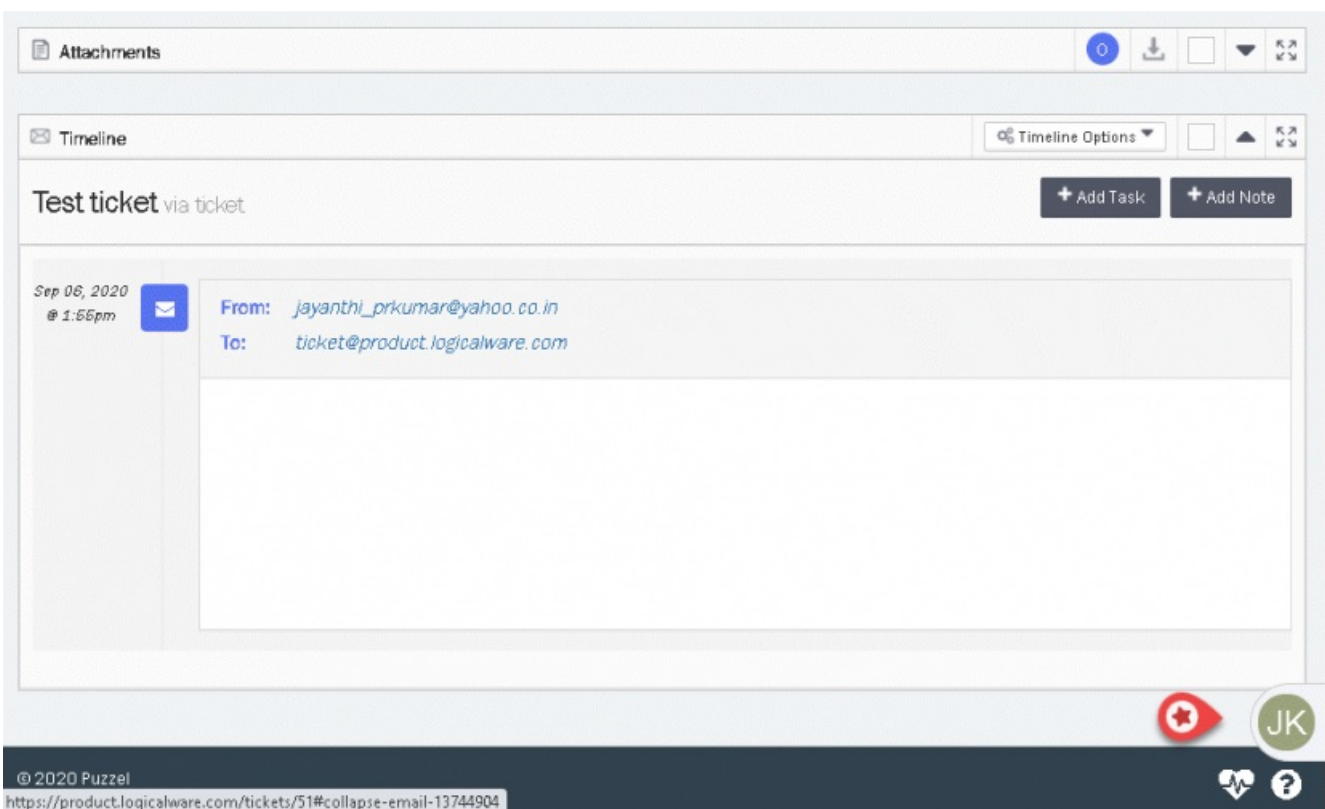
To import multiple customer details save these in a CSV format. Then click on the **Import From CSV** button as shown in the picture, Select the CSV file from your stored location and click Import.



After the users have been added, you can then assign them to one or more teams and define the roles in each of the teams.

#### Automatically adding a customer when they submit a ticket for the first time

As a ticket is created the application checks to see if this belongs to an existing customer - using email address/mobile number as the unique identifier. If no customer exists that uses this identifier then a new customer is automatically created. Open the ticket to see the details and locate for the button with the initials of his/her name at the bottom of the screen as shown below.



The widget opens by clicking on it to show the customer details. By clicking on the name, you will be taken to the customer details page where the basic details from the ticket is already populated. You will be able to add or modify details here as required.

Attachments



Timeline

Test ticket via ticket

Sep 06, 2020 @ 1:55pm



**From:** [Redacted]  
**To:** [ticket@product.logicalware.com](mailto:ticket@product.logicalware.com)

[Redacted email body content]

**jay:** [Redacted]

jayanthi\_prkumar@yahoo.co.in  
Sep 06, 2020 @ 1:55pm

**Customers Tickets:** ^

51	Test ticket	1 minute ago
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**Custom Attributes:** ^

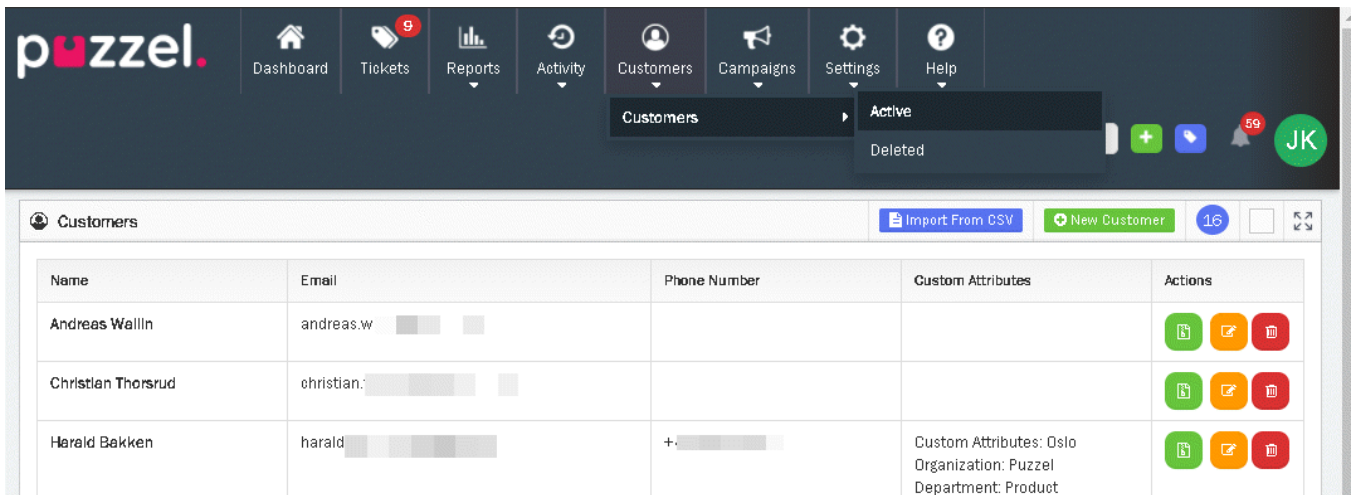




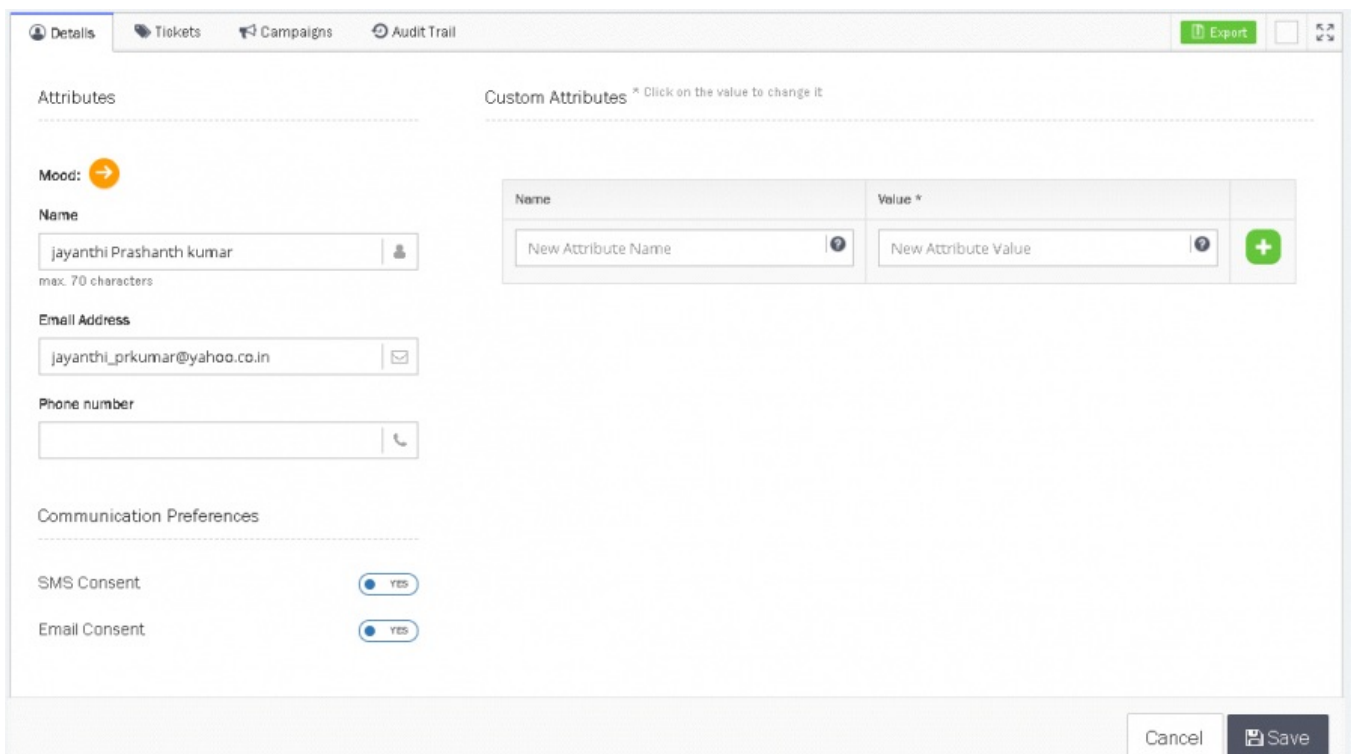
## Checking customer record

To check customer record:

1. Go to Customers-> Customers ->Active to see a list of all active customers. Click on the edit button against teh customer to view his/her details.



2. First tab displays customer details which can be modified and saved.



3. Second tab will show Tickets, where agent can check customer record to understand the ticket history or open tickets.

Details Tickets Campaigns Audit Trail Export

Tickets list Clear Selection Select all on page ↶ ↷ 📄 ✖

Show 10 entries

	#	Subject	Assigned	Status	Response Target	Resolve Target	Priority	Team	Channel	Last Update	From/To	Tags
	51	Test ticket		Resolved			Normal	All Users	ticket	13 days ago	jyanthi_prkumar@yahoo.co.in	communication

Showing 1 to 1 of 1 entries (filtered from 53 total entries) Previous 1 Next

4. Third tab will show history of campaigns that customer received.

Details Tickets Campaigns Audit Trail Export

Email Campaign Deliveries SMS Campaign Deliveries

Active Deliveries

Campaign	Status	Email	Time
New feature announcement duplicate	Saved	jyanthi_prkumar@yahoo.co.in	N/A
New feature announcement 2020-09-19 07:55:14	Saved	jyanthi_prkumar@yahoo.co.in	N/A
Upcoming release	Saved	jyanthi_prkumar@yahoo.co.in	N/A

Showing 1 to 3 of 3 entries 1

Previous Deliveries

Campaign	Status	Email	Time	Open	Click
New feature announcement	Delivered	jyanthi_prkumar@yahoo.co.in	Sep 19, 2020 @ 9:35am	1	
Trial campaign	Delivered	jyanthi_prkumar@yahoo.co.in	Sep 19, 2020 @ 9:28am	3	

Showing 1 to 2 of 2 entries 1

5. 4th tab will show Customer's audit trail

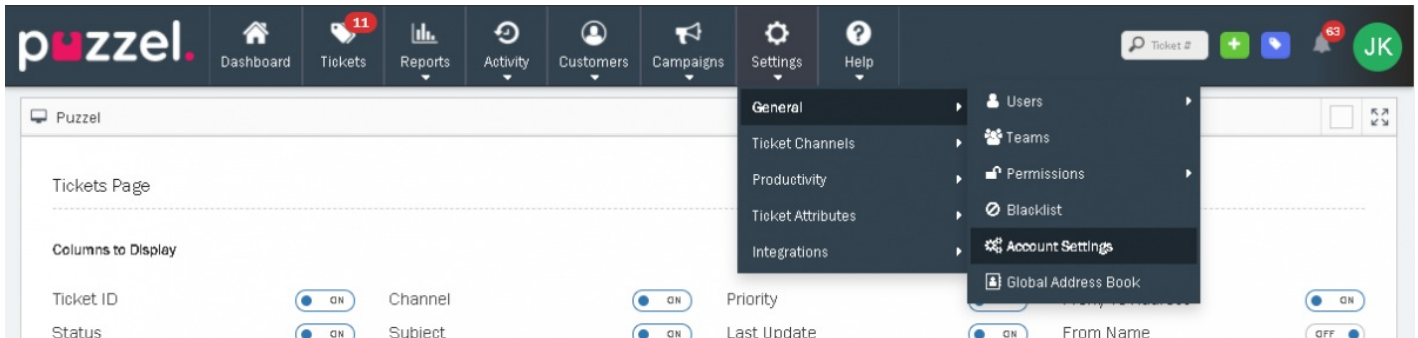
Details Tickets Campaigns Audit Trail Export

Search

	Logicalware	14 days ago		Customer Jeyanthi Prashanth kumar added from manual creation
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## Retention Period & Automatic Deletion

Ensure data is not removed unintentionally whilst also making sure you aren't keeping data longer than you need, to comply with the GDPR regulations. You can make this configurations in the **Account Settings** section:



Set your retention period and automatic deletion period for Tickets and Customers under the Accounts Settings.

**Retention Period:** How long data must be kept or retained before it can be removed. Tickets cannot be deleted from Puzzel Ticketing if they are still within the set Retention period.

**Automatic Deletion Period:** How long data is kept before it is automatically removed from the system. Any data older than the set period is removed.

### GDPR

**Please Note:** Changes to Data Retention and Automatic Deletion will go into effect immediately. Tickets or Customers older than Deletion period will be scheduled for deletion. Tickets cannot be recovered once deleted.

#### Tickets

Retention Period:

Automatic Deletion Period:

#### Customers

Retention Period:

Automatic Deletion Period:

**Tickets:** The Retention and Automatic Deletion Periods for retaining & removing individual Tickets.

**Customers:** The Retention and Automatic Deletion Periods for retaining & removing Customers.

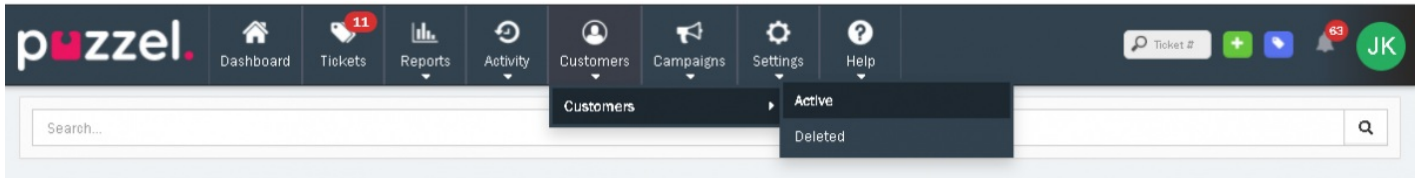
#### Note

Customers cannot be removed if they still have associated Tickets.

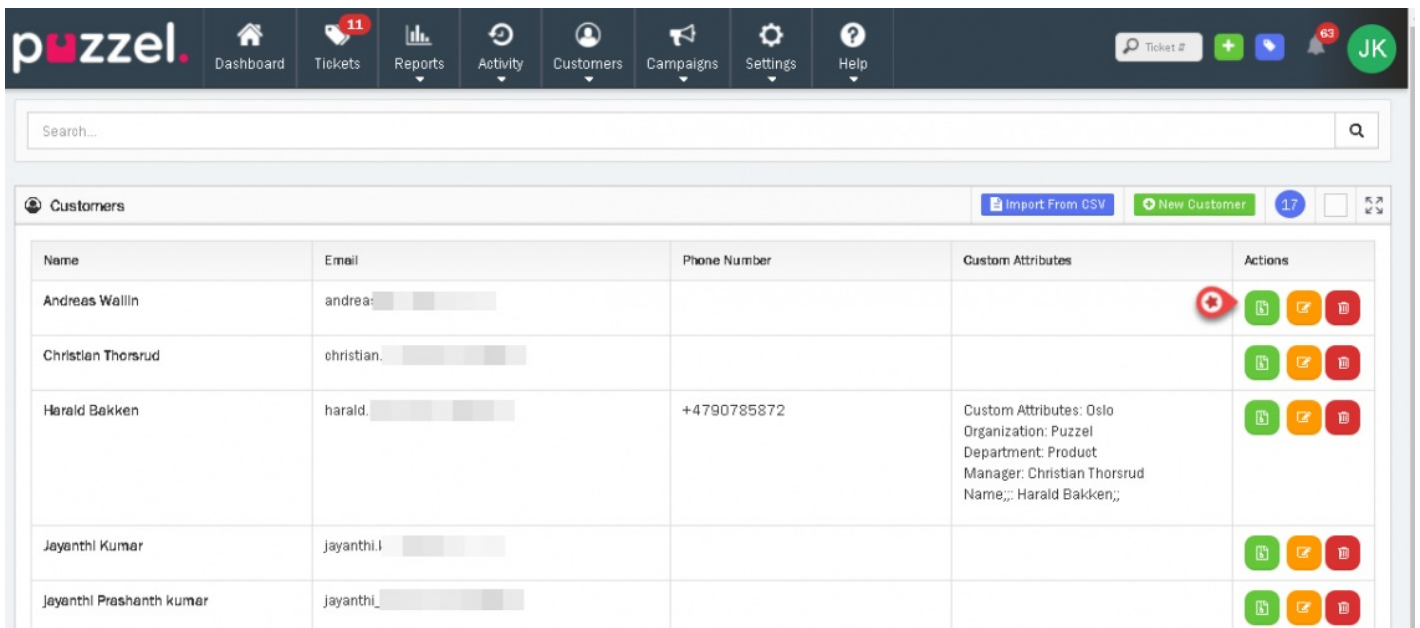
## Customer Data

### Export Customer Data

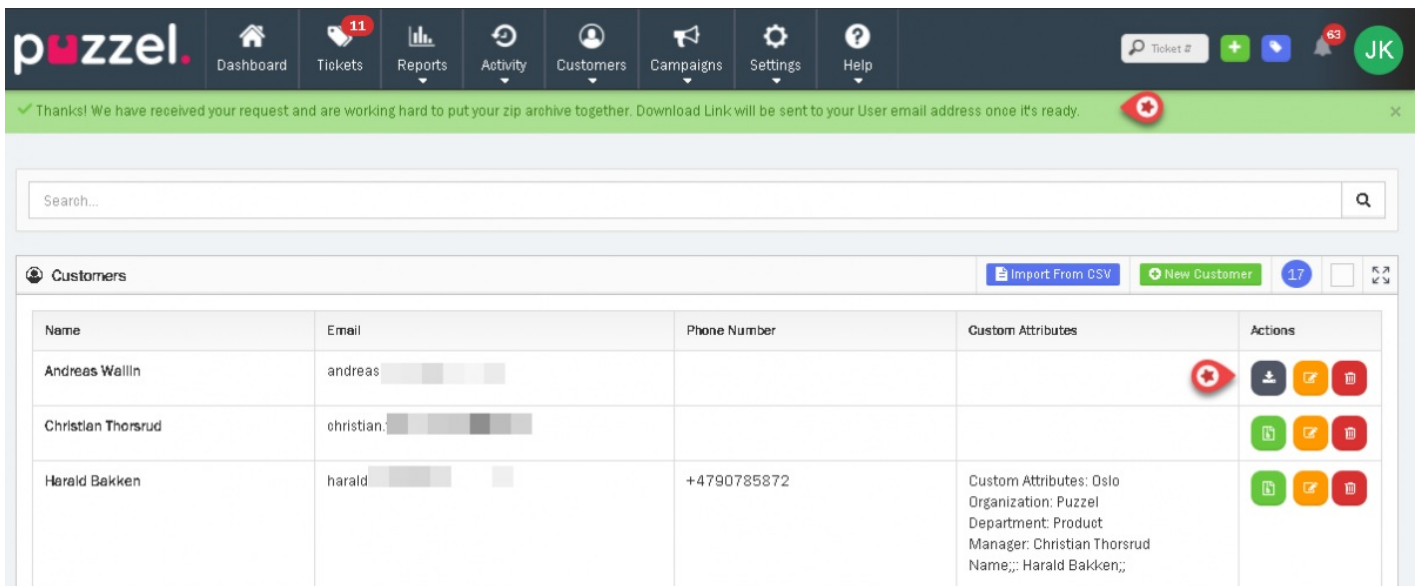
Users with permissions to export Customer's data from the Customers page can go to Customers->Customers->Active.



Select the export button against a Customer you wish to download details of.



The button will now change to “Archive Download” when the Customer Export is available.



When a Customer's archive has been downloaded, a record of who has downloaded is kept in the Customer's audit trail. This can be viewed at the bottom of the individual's Customer page.

**Edit Customer Data**

Users with permission to can Edit and Update Customer's data and information. This can be done by Editing the Customer in the Active Customers page.

**Delete Customer Data**

Users with permission can Delete Customer's data from the Customers page, making it simple to fulfil a Data Removal request. The customer can only be deleted if they have no Unresolved Tickets (Open, Pending & Error) and they are outside of the set Customer Retention period.

An audit trail of all deleted Customers is shown on the Deleted Customers page. The User that removed the Customer, the time & date they were removed, a Customer reference number and partially redacted email address is shown as proof that the Customer's data has been removed without still holding any of the Customer's data.

## User Management

As an administrator, you can add end users or customers, agents and administrators to Puzzel Ticketing, assign agents to teams, define roles within teams, promote them to be administrators, and create other administrator accounts.

- [Creating and editing users](#)
- [Permissions](#)
- [Address Book](#)
- [Blacklist](#)
- [Teams](#)
- [Account Settings](#)
- [GraphQL API](#)

## Creating and editing users


Settings->General -> Users in the top menu has three options:

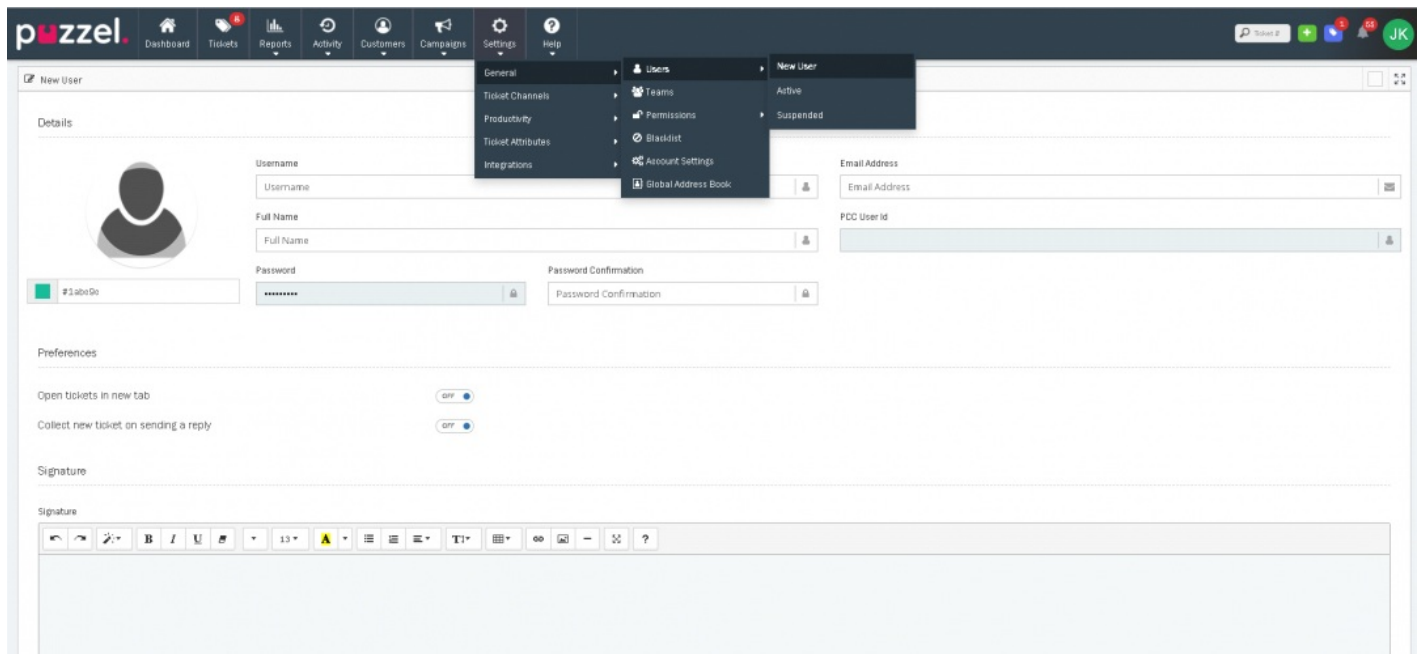
- New User
- Active
- Suspended

### New user

An Agent will need a User account for accessing Puzzel Ticketing. The User details include:

- Username
- Email Address
- Real Name
- Password
- System Role

New Users can be created individually from the **New User** option under the Settings->General->Users or by selecting the  button on the Users settings page[Settings->General->Users->Active].



Give the User a suitable Username. Recommended format is:**[first initial].last name** as a best practice. John Doe would have the username “j.doe” as an example.

Enter the email address for this User. The Email address is used for some export options and to allow the agent to reset their password if they have forgotten it.

If the agent doesn't have their own email address, a dummy email address can be entered. E.g. **“dummy1@dummyemail.com”**

#### Note

Users cannot have the same Email address.

Provide the Full Name of the User and enter a password.

Passwords must:

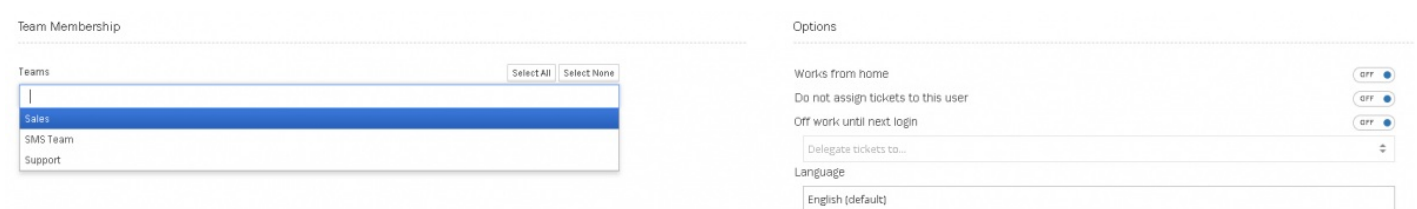
- be at least 6 characters long
- contain at least 1 UPPERCASE character
- contain at least 1 lowercase character
- contain at least 1 special character
- contain at least 1 number

User preferences can also be set:

- Open Tickets in a new tab: when set will open the tickets in new tab instead of a new Window.
- Collect new Ticket on sending a reply: automatically provides the User with next ticket once he has replied for an existing Ticket.

A User Signature can be added. This will be used only when replying to Email Tickets. This signature is ordered before any Email Channel Signatures that may be present.

The Teams to which a User should be a member of can also be set here. Alternatively, this can be set under the Teams settings.

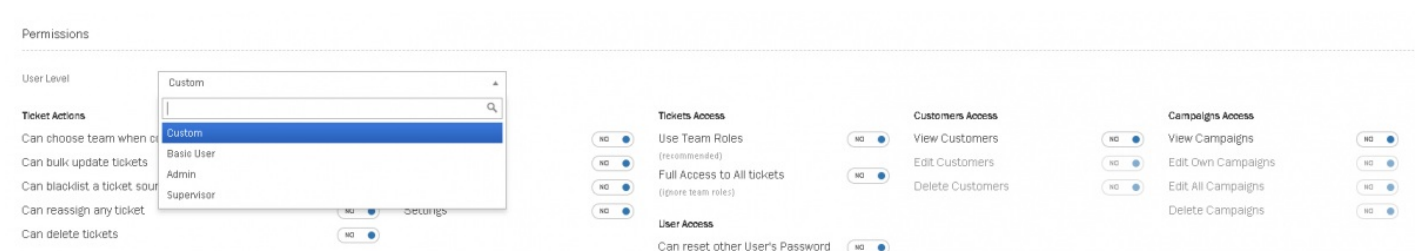


Additional User options can also be set as stated below:

- **Works from home** : This allows User to access Puzzel ticketing without being locked to the security allowed IP.
- **Do not assign tickets to this user**: Prevents any Tickets being assigned or collected by this User.
- **Off work until next login** : Should be used if this User is on leave. A delegate User can be set to ensure any ongoing Tickets aren't missed or ignored until the user returns.

Finally, the User's permissions can also be set here. A pre-defined System Role such as Admin, Supervisor or basic can be created, or a Custom role can be set for the User to give them a specific set of Permissions and Access. Selecting the User Level will set the permissions to those set in System Roles even when these are updated.

Custom levels are unique to the User and gives the ability to have granular permissions across different users.



## Active user

A list of all active users can be found under Settings->General->Users->Active.



	Full Name	Username	System Role	Teams	Off Work	Language	Actions
	Agent 1	agent1	Basic User	Sales, Support	No	English (Global Value)	<a href="#">Edit</a> <a href="#">Suspend</a>
	Andreas Wallin	[Redacted]	Admin	Sales, Support	No	English (Global Value)	<a href="#">Edit</a> <a href="#">Suspend</a>
	Christian Thorpsrud	[Redacted]	Admin	Sales, Support	No	English (Global Value)	<a href="#">Edit</a> <a href="#">Suspend</a>
	Danish	Danish	Admin	Sales, Support	No	Danish	<a href="#">Edit</a> <a href="#">Suspend</a>
	Finnish	Finnish	Admin	Sales, Support	No	Finnish	<a href="#">Edit</a> <a href="#">Suspend</a>
	Harald Bakken	[Redacted]	Admin	SMS Team, Support	No	English (Global Value)	<a href="#">Edit</a> <a href="#">Suspend</a>
	Jan Righ	[Redacted]	Admin		No	English (Global Value)	<a href="#">Edit</a> <a href="#">Suspend</a>
	Jayanthi Kumar	[Redacted]	Admin	Sales, Support	No	English (Global Value)	<a href="#">Edit</a> <a href="#">Suspend</a>

Users can also be created in bulk using the **import from CSV** option as shown in the picture above.

A template CSV file can be downloaded here: [import\\_user\\_templateDownload](#)

### Note

Not all attributes can be bulk imported from CSV. Hence you will need to assign some attributes individually after user creation.

## Suspended Users

Suspended Users are not included in user limits calculations. Where a User is Suspended, Open or Pending Tickets assigned to them are automatically returned to the Team. Resolved Tickets against him remains unchanged.

	Full Name	Username	System Role	Teams	Actions
	Jon Magnus Hushevd	[Redacted]	Admin	Support	<a href="#">Activate</a> <a href="#">Delete</a>
	Puzzel	puzzel	Admin		<a href="#">Activate</a> <a href="#">Delete</a>
	Agent Thomas	[Redacted]	Custom		<a href="#">Activate</a> <a href="#">Delete</a>

A Suspended User can be Reactivated by pressing the **Activate** button against their name.

## Permissions

Permissions are where the overall master access controls are set. There are two types of roles:

- [Team Roles](#)
- [System Roles](#)

## Team Roles

Team Roles allow Users to be treated differently within a Team by setting the assignment & notification preferences for each Team individually, instead of by a User's settings.

### Best Use Example

A team is made up of at least two levels of Users:

- **Basic Members** – Automatically assigned or manually collect tickets. Receives ticket notifications. Processes tickets assigned to them. Basic Members can be automatically assigned tickets and receive notifications when they are assigned a ticket, and when the Response or Resolve Target for that ticket is about to expire.
- **Team Supervisor** – Aren't assigned tickets. Support Basic Members by assigning & reassigning tickets to ensure they're dealt by the best available team members. Team Supervisors aren't automatically assigned Tickets, and only receive a notification if they are assigned a ticket by a System Admin or by another Team Supervisor.

If each of your Teams operates slightly differently, you can create different Team Roles specific for each Team.

### Note

- 1) You can add as many new Team Roles as you need, and edit the existing default Team Roles too
- 2) A User could be a Basic Member of one Team, but a Supervisor in another

### How to create new Team Roles

Go to: Settings > General > Permissions > Team Roles

Name	Ticket Reassignment	Tickets Access	Reply Access	Web Notifications	Email Notifications	Actions
Basic Member		Own Tickets only				<a href="#">Edit</a>
Team Supervisor	Return to Team, Self, Team Members, Any Team	All Tickets in the Team				<a href="#">Edit</a> <a href="#">Delete</a>

### To create a new Team Role

- Click the green button on the top right.
- Give the Team Role a new name.
- Choose the Assignment Permissions.
- Choose the Notification Preferences.
- Save.

New Team Role

Team Role Details

Name

Assignment Permissions

- Can be auto-assigned tickets  YES
- Can return tickets to original team  NO
- Can re-assign tickets to self  NO
- Can re-assign tickets to team members  NO
- Can re-assign tickets to any team  NO
- Can collect available tickets  YES

Tickets Access

- Assigned tickets access  NO
- Unassigned tickets access  NO

Reply Access

- Can free-type reply  YES
- Can edit reply signature  YES
- Can attach files when replying  YES
- Spell-check message when replying  NO

Web Notifications

- Assigned ticket notification  YES
- Unassigned ticket notification  YES
- Pending ticket notification  NO
- Response target expiry notification  YES
- Resolve target expiry notification  YES

Email Notifications

- Assigned ticket notification  NO
- Unassigned ticket notification  NO
- Pending ticket notification  NO
- Response target expiry notification  NO
- Resolve target expiry notification  NO

Customers Access

- Can edit Customer Intelligence Panel  NO

Cancel Save

Users are assigned to a Team Role from the Edit Page of each Team.

Go to: Settings > General > Teams .

Click the blue “Edit” button to view the Edit Page

Click the input box for each Team Role to add Users to that Team Role for this Team.

- Team Roles have to be set for each Team from the Edit page for that Team.
- A User can be assigned a different Team Role for each Team they’re a member of.

All Users in a Team are assigned as Basic Members by default. If a Team Role is removed, any Users that were assigned to that Team Role in any team will be reassigned to the Basic Members Team Role.

### Note

The Basic Members Team Role cannot be deleted, but it can be edited and renamed.

Property	Description
<b>Assignment Permissions</b>	
Can be auto-assigned tickets	When YES tickets are auto assigned in team
Can return tickets to Original team	When YES can return tickets to original team
Can reassign tickets to self	When YES can reassign tickets to self
Can reassign tickets to team members	When YES can reassign tickets to self
Can collect available tickets	When YES can Collect available tickets
<b>Ticket Access</b>	
Assigned tickets access	When YES can access assigned Tickets
Unassigned tickets acces	When YES can access unassigned Tickets
<b>Reply Access</b>	
Can free type reply	When YES can free type reply
Can edit reply signature	When YES can edit reply signature
Can attach files when replying	When YES can attached files when replying
Spell-check message when replying	When YES, reply is automatically checked for spellings and suggeseted auto-corrections are displayed for errors
<b>Web Notifications</b>	
Assigned ticket notification	When YES in app notification of ticket being assigned to User
Unassigned ticket notification	When YES in app notification will advise when unassigned ticket is available
Pending ticket notification	When YES in app notification will advise when pending ticket
Response target expiry notification	When YES in app notification of reply being close to Response SLA target
Resolve target expiry notification	When YES in app notification of reply being closeto Resolve SLA target
<b>Email Notifications</b>	
Assigned ticket notification	Email is sent to User email address of assigned ticket

Property	Description
Unassigned ticket notification	When YES email is sent if unassigned ticket
Pending ticket notification	When YES email is sent if pending ticket
Response target expiry notification	When YES email is sent to User email address of reply being close to Response SLA target
Resolve target expiry notification	When YES email is sent to User email address of reply being close to Resolve SLA target
<b>Customer Access</b>	
Can edit Customer Intelligence Panel	When YES can edit Customer Intelligence Panel

## System Roles

Instead of setting the System Access & User preferences of each individual User, System Roles let you create different Roles with different permissions and preferences to apply to Users all at once.

System Roles mean you can update the Access & Actions for an entire group of Users at once, instead of one-by-one. This will also mean a lot of time saved when creating new Users.

### Best Use Example

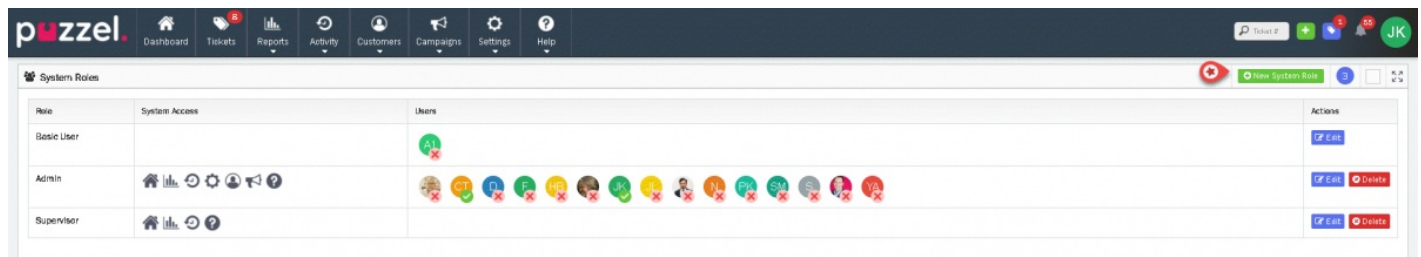
Each of your Teams are made up of 3 levels of Users:

1. **The Basic Users** – Has limited access and permissions. Works through the tickets that are assigned to them.
2. **The Supervisor** – Supports the Basic Users, able to reassign tickets and other more advanced actions as necessary. Can also report on their Teams.
3. **Admin** – Can change the Team & User settings and options as necessary. Can create New Ticket Rules to ensure tickets are received and assigned correctly.

You can now create a System Role to suit how your Teams operate and work together, and assign several Users to each System Role.

### How to create new System Roles

Go to: Settings -> General-> Permissions-> System Roles



Three System Roles are available by Default:

1. **Basic User** : They have the most limited access and permissions available, only able to collect tickets from all their teams and view tickets currently assigned to them. This System Role cannot be deleted. Like the “All Users” Team, this SystemRole ensures there is always an existing System Role in your Logicalwareaccount.
2. **Supervisor**: They have the right to view all tickets in their own teams and have access to the Dashboard, Reports & Activity Log by default.
3. **Admin** : They have every available access & permissions. Admin Users can view all tickets and have access to the Dashboard, Reports, Activity Log, Settings. They can also change User settings and options and are able to define new Ticket rules.

### Note

You can create as many new System Roles as you like, and edit the existing default System Roles too.

To create a new System Role:

1. Click the green **+ New System Role** button on the top right.
2. Give the System Role a new name.
3. (optional) Add the Users for this System Role (this can be done later.)

4. Choose the available Ticket Actions.
5. Choose the available Ticket Access.
6. Choose the available System Access.
7. Save.

The same steps can be followed to edit an existing System Role, simply click the “Edit” button to the right of the System Role you wish to change.

Click the “Delete” button to remove a System Role. Before you can delete a System Role, all Users currently assigned to it must be reassigned to a different System Role.

### Note

You cannot delete a System Role that is still assigned to a User.

Instead of setting the system access and user preferences for each individual user, System Roles let you create different Roles with varying permissions to update the access and actions for a group of users. This gives better control over access rights and is more efficient to setup.

Property	Description
<b>Ticket Actions</b>	
Can choose team when collecting ticket	Allows user to collect ticket from different teams from <b>Collect</b> button in top right corner
Can bulk update tickets	Bulk update is when multiple tickets are updating in one action, by selecting tickets on Tickets page and then clicking on Bulk Update. This setting allows Users the permission to have access
Can blacklist a ticket source	Allows User to add a ticket source to the system Blacklist
Can reassign any ticket	Allows User to reassign a ticket to a different User. This will be visible in the Ticket timeline
Can delete tickets	Allows User to delete tickets. Please not once tickets are deleting they cannot be recovered
<b>System Access</b>	
Dashboard	Turns ON Dashboard access for System Role
Reports	Turns ON Reports access for System Role
Activity Log	Turns ON Activity Log access for System Role
Settings	Turns ON Settings access for System Role
<b>Customer Access</b>	
View Customers	When ON can view Customers active records, attributes, all tickets against that customer and audit trail
Edit Customers	When ON can edit Customers
Delete Customers	When ON can delete Customers
<b>Campaign Access</b>	
View Campaigns	When ON can view SMS and email Campaigns
Edit Own Campaigns	When ON can edit own SMS and email Campaigns
Edit All Campaigns	When ON can edit all Campaigns
Delete Campaigns	When ON can delete Campaigns

## Address Book

Users can select contacts from an address book when sending a message or response. To be able to use this, the **Address Book** feature should be enabled under the Account Settings. Once this is enabled, you will be able to see two Address Books.

1. An Account-wide General Address Book
2. A Personal Address Book that is user-specific

Once added to an Address Book, Contacts will be displayed for users to select from when adding a new recipient to the TO or CC fields for an Email Ticket.

Users can search for a contact in either the Company Address Book or their Personal Address Book by typing in the address field.

Contacts can be added in bulk to either Address Book using a CSV file and the “Import From CSV” option on the Address book Settings page.

### Global Address Book

The global address book contains the records of global contacts available across all users, if permissions allow.

When free typing an email address into a send or reply this will reference against the address book and will auto populate with suggestions of contacts using the letters typed.

Contacts can be Imported by CSV into the Global Address Book using appropriate CSV template.

There is also option to auto populate the Global Address Book. This is turned on from Account Settings and means that all emails received are then added to the Global Address Book.

A contact can also be manually created.

A contact can be deleted or edited.

Q

👤 Company Contacts
 
[Import From CSV](#)
[New Contact](#)

Please note: Contacts below are visible to everyone in the system.

First Name	Last Name	Email addresses	Created at	Actions
Johnathan	Doe	notjohndoe@email.com	Wed Aug 21 15:54:24 2019	<a href="#">Edit</a> <a href="#">Delete</a>
John	Doe	j.doe@logjcalware.com, john.doe@company.com	Wed Aug 21 15:36:38 2019	<a href="#">Edit</a> <a href="#">Delete</a>
Greg	Baker	sausage@roll.com	Wed Aug 21 15:33:27 2019	<a href="#">Edit</a> <a href="#">Delete</a>
Jane	Smith	J.smith@logjcalware.com	Wed Aug 21 15:33:27 2019	<a href="#">Edit</a> <a href="#">Delete</a>
Jim	Gompertz	jim.gompertz@logjcalware.com	Tue Nov 27 10:58:42 2018	<a href="#">Edit</a> <a href="#">Delete</a>



## Blacklist

Blacklisting an address identifies mail from an originator that should not be actioned by an agent in Puzzel Ticketing. To facilitate this a New Ticket Rule must be set up closing the tickets automatically.

Blacklisted Addresses					<a href="#">Blacklist new address</a>	1		
Originator	Subject	Blacklisted At	Blacklisted By	Actions				
sales@logicalware.com		2020-02-25 23:33:55 +0000	logicalware	<a href="#">Edit</a> <a href="#">Delete</a>				

Click on Blacklist new address.

Then input the address to be blacklisted.

The list shows all blacklisted addresses along with when this was blacklisted by whom. Each record can then be edited or deleted.

## Teams

Teams are a way of organizing Users based on the type of activity they perform. Users can collect and be assigned with Tickets governed by the Team membership controls.

### Create/Edit/Delete Teams

To create, edit or delete a Team, go to Settings->General->Teams. You can see a list of all teams or search for a particular team in the search tab above. All users in the team are also displayed against the team in the listing and options to Edit/Delete a team are also available.

Name	Users	New Tickets	Actions
All Users	[User Avatars]	Hold tickets in Team for manual assignment or collection	[Edit] [Delete]
Sales	[User Avatars]	Hold tickets in Team for manual assignment or collection	[Edit] [Delete]
SMS Team	[User Avatars]	Hold tickets in Team for manual assignment or collection	[Edit] [Delete]
Support	[User Avatars]	Hold tickets in Team for manual assignment or collection	[Edit] [Delete]

### Note

- 1) There are no limits on the number of Teams that can exist within an account
- 2) The screen for create and edit Teams are the same.

When you click on **New Team** button or Edit option, the following New Team screen will be presented.

**Team Details**

Name:  Business Hours: 24 hours Team Members:  [Select All] [Select None]

**Team Roles**

Basic Member:  [Select Some Users] Team Supervisor:  [Select All] [Select None]

**Team Assignment Rules**

**Newly Created Tickets**

- Hold tickets in Team for manual assignment or collection:  ON
- Automatically assign Tickets to Team Members in turn:  OFF
- Automatically assign Tickets to Team Members with least open tickets:  OFF
- Automatically assign Tickets to Online Team Members only:  OFF

**Re-Opened Tickets**

- Assign the ticket as if it was new:  ON
- Assign to last assigned user:  OFF

Return tickets back to the team at:

Automatically close resolved tickets every:

Automatically delete attachments of closed tickets every:

Send pending ticket notification after:

The first section is the Team Details and has three parameters to complete as detailed in the table below.

Team Details

Name:  Business Hours: 24 hours Team Members:  [Select All] [Select None]

Parameter	Description
Name	A name to the Team which you wish to create
Business Hours	Business Hours is the working time for this Team. Timers for SLA's (reply and resolve) only countdown during business hours. Working Hours are set in Settings/Productivity and should be carried out before Teams are set-up. 24 hours is provided as a Business Hours default option regardless of if anything is set in the Working Hours options. Click on drop down list to select the appropriate Business Hours for the Team. This will also include any Public Holidays set for this Team.
Team Members	Click in the Select Team members box to be presented with a list of all Users in the Account. To make it faster to add users there is the option to Select All (adding all setup Users) or Select None (removing all included Users). A User should be in a Team to access and work Tickets assigned to that particular Team

The next section is of **Team Roles** which sets the user permissions within the Team.

#### Team Roles

Basic Member

Select Some Users

Team Supervisor

Select All Select None

Select Some Users

Property	Description
Basic Member	When Users are added to a Team they are automatically included as Basic Members. The rights of a Basic Member are set in Settings/Permissions/Team Member and when these are changed access updates automatically. The Basic Members Team Role cannot be deleted but it can be edited and renamed.
Team Supervisor	A Team does not need to have a Supervisor, but where it does they have more access rights than a Basic Member. To update to a Team Supervisor click on the 'Select Some Users' box and this will then show the Basic Members in the team. When they are selected they are automatically moved from Basic Member to Team Supervisor. For ease of speed the options exist to Select All (adds all Basic Members to Supervisor) or Select None (removes all Supervisors back to Basic Members).

Team Assignment Rules section is used to control how Tickets are Assigned to Teams.

Team Assignment Rules

**Newly Created Tickets**

Hold tickets in Team for manual assignment or collection  ON

Automatically assign Tickets to Team Members in turn  ON

Automatically assign Tickets to Team Members with least open tickets  ON

Automatically assign Tickets to Online Team Members only  ON

**Re-Opened Tickets**

Assign the ticket as if it was new  ON

Assign to last assigned user  ON

Return tickets back to the team at:

Automatically close resolved tickets every:

Automatically delete attachments of closed tickets every:

Send pending ticket notification after:

⚠️ Once closed, tickets cannot be edited.

In an integrated setup with Puzzel Contact Centre solution, tickets are assigned through the Puzzel routing engine and therefore the following settings must be used.

**Newly created tickets :** This must be set to **ON** for holding tickets in the Team for manual assignment or collection of tickets. Selecting this option will result in all tickets assigned to the team being kept with the team unless a User manually assigns the ticket to himself.

**Re-opened tickets :**

**Assign the ticket as if new** must be set to ON. Selecting this option will result in the re-opened tickets being treated as if they were new.

**Assign to last assigned user :** Selecting this option will result in the re-opened tickets being assigned to whoever it was assigned to previously.

For standalone Puzzel Ticketing solutions, the following options are selected depending on the desired behaviour.

Property	Description
Hold tickets in Team for manual assignment or collection	Tickets are not automatically assigned to Users but can be collected using the Collect button ensuring the most relevant ticket is automatically chosen. The Collect queue is sorted by SLA and Priority (set by Rules) to ensure that most important Tickets are dealt with first.
Automatically assign Tickets to Team Members in turn	Tickets are distributed automatically to Users in the Team in a rotary or round robin method
Automatically assign to Team Members with least Open tickets	Tickets are automatically assigned to Users in the Team with the least number of assigned Tickets in Open status
Automatically assign to Online Team Members	Tickets are automatically assigned to Users in the Team in a rotary method but only to Users online. If no Users online Tickets held for Collection or Manual assignment

Some additional ticket assignment behavior options can be used in both integrated and standalone mode.

Property	Description
Return tickets back to Team at	Moves any unresolved Tickets (open, pending, error) to unassigned at the time selected. This should be at the end of the working day for the Team. By selecting <b>Automatically assign Tickets to Team Members in turn</b> from Newly Created Tickets and then <b>Return tickets back to the team at XX:XX</b> , returns all unresolved tickets to the Team at XX:XX, redistributing the ticket load automatically across Users ensuring a balanced workload.
Automatically close resolved tickets every	Closed tickets cannot be edited or reopened. This setting automatically closes resolved tickets every X duration selected.  <div style="border: 1px dashed gray; padding: 10px; margin: 10px 0;"> <p><b>Note</b></p> <p>Please note that once tickets are closed they cannot be edited.</p> </div>
Automatically delete attachments of closed tickets every	Deletes attachments of all closed tickets at the set time period
Send pending ticket notification after	When selected will remind the user by email that they have a pending ticket on timeframe set to be defined in settings.

Ticket Reply Options defines the behaviour of a ticket while sending a reply.

Ticket Reply Options

---

Text to insert into the ticket subject

Ticket number: #%T

Delay replies until next working hours  ON

Queue replies sent outside of work hours  ON

Set Response Target  OFF

Set Resolve Target  OFF

**Text to insert into the ticket subject:** When replying to tickets each team can include text which is inserted into the start of the email subject. For example this could be 'Your Customer Enquiry #T' added to the start of the subject. #T is replaced with ticket number when email sent.

**Delay replies until next working hours:** Working hours are defined by Business Hours of the Team. When ON tickets can be worked but no replies sent until the opening time defined in Business hours. This is used to queue and control when replies are sent, especially useful in scenarios such as off shoring

### Categories

Normally categories can be set up for an account. In the Team settings, the behaviour of a category relative to a specific team is set.

Categories

---

Hide Categories

None

Force Category Choice to Resolve

None

No. Required

-

**Hide Categories:** Hides the category(s) from this team. Select all categories to be hidden. Category(s) are set in Ticket Attributes and only Categories already created can be selected.

**Force Category Choice to Resolve:** Where used a Category is mandatory to resolve a Ticket. If a ticket is resolved without a category then a warning message will be given to force a category to be included. Categories are selected from the categories created in ticket attributes. As many categories as required can be included in this section; the No Required sets how many must be selected to allow the ticket to resolve. For example: it is possible to have 5 Categories, but only one is required.

### Channels

This property controls the access to channels when a manual ticket is created by an agent.

Channels

Can start conversation from any Channel  OFF

Add Channels: Showing all 2

Search

Email  
Ticket  
Sms  
Puzzle Test

Selected Channels: Showing all 2

Search

Email  
Box 2  
Test

Cancel Save

When a Manual Ticket is created using New Ticket button, a User must select a Team that he is a member of. Once the ticket is created, conversation can be initiated. This setting controls which channel(s) can be used for communication with the customer.

If set to **ON**, any Channel can be used.

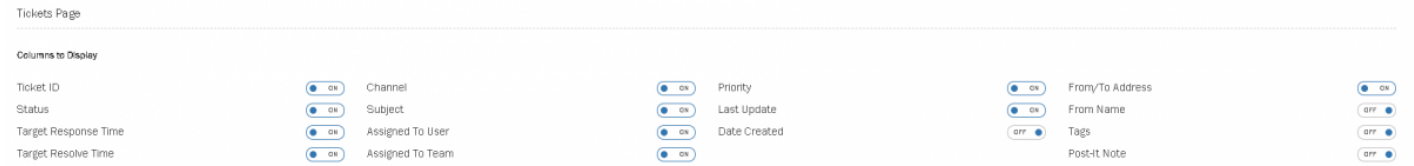
If set to **OFF**, the channels that must be used need to be selected manually, as below. If no channels are selected New Tickets cannot be created.

## Account Settings

Accounts Settings is an option under Settings where general controls and display views are setup.

### Tickets Page

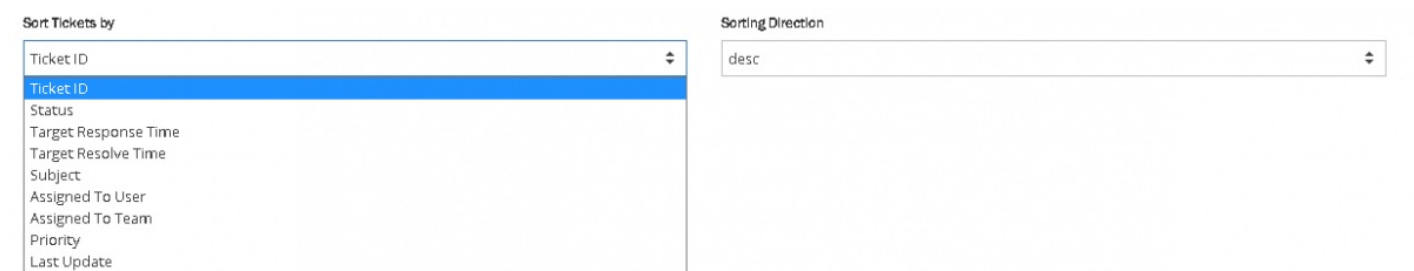
**Columns to Display** under Tickets Page is a section where you can choose the columns you want to display in the Tickets Page.



**Categories to Display** controls which columns are displayed in the Ticket table.

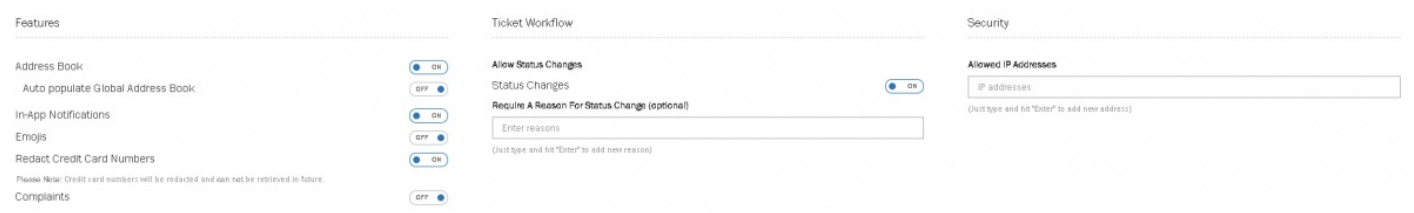



On the Tickets page, you can sort the tickets in ascending or descending order on the selected column, listed in the drop down menu of **Sort Tickets by** option.



## Features

You can turn on/off some key features in the **Features** section.



Feature	Description
Address Book	Allows or denies access to the Company Address Book. Company Address Book can be accessed by everyone in the system when ON
In-App Notifications	Allows or denies access to the in app notifications in the top right corner of the application as shown : 
Emojis	Allows or denies access to emojis in the text editors in Puzzel Ticketing
Redact Credit Card Numbers	Allows or denies redaction of credit card numbers. When ON, if a credit card reference is emailed into Puzzel Ticketing, it will automatically be redacted so that the agent cannot read this. These cannot be retrieved in the future.
Complaints	ON/OFF complaints advanced workflows

## Ticket Workflow

Property	Description
Status Changes	When OFF users can only change ticket status by reply & resolve or reply & pending options when replying to tickets. When ON ticket status can be manually updated and saved
Require a Reason for Status Change	Optional. When reason(s) are entered into box it is necessary to include a reason to be able to make a status change. As many reason options can be included as desired

## Security

**Allowed IP addresses** : When an IP address is included access to Puzzel Ticketing is lock down to the IP address(s) included in this field. A work around is to use work from home option for users to enable access outside of the IP range.

## GDPR

GDPR

Please Note: Changes to Data Retention and Automatic Deletion will go into effect immediately. Tickets or Customers older than Deletion period will be scheduled for deletion. Tickets cannot be recovered once deleted.

**Tickets**

Retention Period:

Automatic Deletion Period:

**Customers**

Retention Period:

Automatic Deletion Period:

Localisation

**Preferred Timezone**

Formatting

**Font Style**

**Font Size**

You can ensure data is not removed unintentionally whilst also making sure that data is not kept for longer than necessary from a GDPR perspective.

Property	Description
<b>Tickets</b>	
Retention Period	Time duration for which tickets must be retained before it can be removed. Tickets cannot be deleted from PT if they are still within the set Retention Period
Automatic Deletion Period	Time duration for which tickets are to be kept before it is automatically removed from the system. Any tickets older than the set period is removed daily
<b>Customers</b>	
Retention Period	Time duration for which customer data is retained before it is removed from the system. Customers cannot be removed if they still have associated tickets. You will be able to see a list of all deleted customers by going into <b>Customers-&gt;Deleted</b> from the main menu. Here you can find the <b>User</b> who removed the Customer, the time & date they were removed, a Customer reference number and partially redacted email address.
Automatic Deletion Period	Time duration for which data is to be kept before it is automatically removed from the system. Any tickets older than the set period is removed daily

## Localisation

**Timezone:** Select the timezone for the account. Only one timezone can be set per account.

## Formatting

The font style and size can be changed. This will apply to Notes, Replies (unless a template) and follow up. Please note that the font size in Puzzel Ticketing is PX (Pixel) measurement which is best practise for web applications. Mail editors tend to use PT (Point) so conversion sizes should be verified.

## GraphQL API

The tenant may make requests to Puzzel Ticketing via a GraphQL API. GraphQL is a standard created by Facebook and made open in 2005, that purports to replace REST and that has many advantages over it.

API is a setting which must be Admin enabled on setup of the account or later by making a change request.

GraphQL API

---

WARNING: Refreshing the API key will cause the previous key to become obsolete. Any new and existing GraphQL API requests must use the new API key.

Refresh API Key

API Key 362573deab4652d0e7c889ee1ae1c8f8

API Secret [Show secret key](#)

Webhooks URL

You connect to a GraphQL API at an endpoint. In our case, this endpoint is: <https://logicalware.logicalware.com/graphql>

Access to the API is granted based on an API token, which is individual to each tenant.

You will find your own token in the Account Settings section of the portal.

**Authentication:** API requests must be authenticated. This is done by means of an HTTP request header. The name of the header is X-API-Token and its value must be your API token. While testing the API please remember to always include this authentication header as well.

Note that authentication is required even for the introspection query; in other words, you cannot access the GraphQL schema documentation without it.

**Introspection:** The GraphQL API fully supports introspection. Introspection is a GraphQL feature by which the API schema is made immediately available, together with all its documentation, by means of a special GraphQL query. If you use GraphQL as an aid during development, you will find the schema documentation in the 'Docs' tab.

**Queries:** GraphQL data is read using queries. A simple example of a query is:

```
{ ticketsPerChannel(channelDescriptor: Email) }
```

This query is fully documented in the schema, as seen in the API introspection.

**Mutations:** Backend data is changed using mutations. There are several ways to write a GraphQL mutations. Below is an example that contains variables.

```
mutation createTicket($ticket: TicketInputType!) {  
  createTicket(ticket: $ticket) {  
    errors  
    success  
  }  
}
```

With this mutation, you can use variables such as:

```
{  
  "ticket": {  
    "channelDescriptor": "Email",  
    "customerName": "abc",  
    "customerEmail": "aaa",  
    "userEmail": "a@b.com",  
    "rawEmail": "some message"  
  }  
}
```

This query is fully documented in the schema, as seen in the API introspection.

For more information please refer to Help/API within the application.



## Ticket Channels

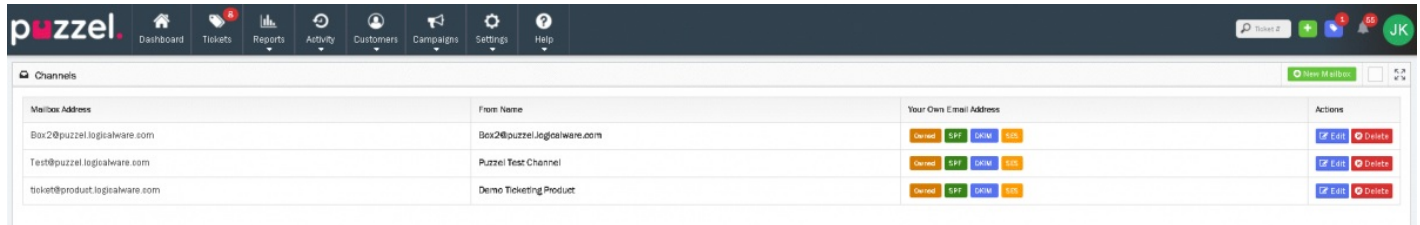
This section describes various channels you could create to receive customer requests as tickets into the Puzzel ticketing system.

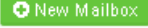
- [Email channel](#)
- [Facebook channel](#)
- [Instagram Channel](#)
- [Twitter channel](#)
- [SMS channel](#)

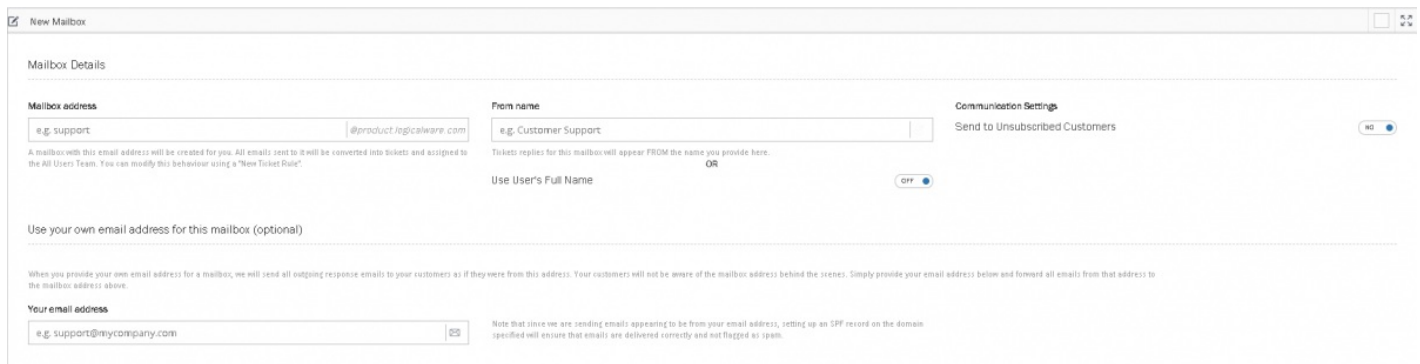
## Create Email Ticket Channel

An email ticket channel is a mailbox.

To setup an email ticket channel, you need to go to Settings->Ticket Channels->E-mail. This shows all the ticket channels in the system.



To create a new mailbox click on the  icon on the top right corner to open the New Mailbox screen.

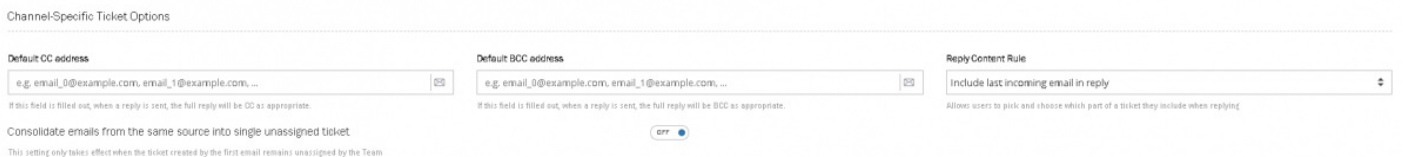


### Mailbox Details section

Mailbox details can be entered here. Look into the following table to for a description of all properties in this section. Details can also be edited for existing mailboxes.

Property	Description
Mailbox address	Defines the email address created using the account name. Emails are then forwarded to this email address to create ticket
From Name	Sets the name shown on ticket replies
Use Users Full Name	If this is ON ticket replies do not use From Name, instead the Users Name is shown on ticket replies
Sent Unsubscribed Customers	Related to email Campaign. Set to ON if the channel is to ignore unsubscribe customer requests, i.e. business need for contact
Use own email	Sets own email address for outgoing responses, using SPF/DKIM for correct delivery of the mask. Please refer to Puzzel Ticketing External Links Guide for more details

### Channel-Specific Ticket Options



**Default CC address:** if field completed all replies on this specific channel will be CC'd to the email completed.

**Default BCC address :** if field completed all replies on this specific channel will be BCC's to the email completed. This could be used if customer wants replies on their servers.

**Reply Content Rule:** there are two options – (i) include last incoming email in reply or (ii) all emails in reply.

## Ticket Management

This section sets how the default reply address on a ticket is determined. Only one option can be selected here.

### Ticket Management

---

#### Default Reply Addresses

Customer address only



Most recent reply address



All previous addresses



All previous addresses (excluding forwards)



## Email Layout

Selecting ON uses an email layout in this channel. Email layout allows a template to be used and then a layout constructed with options on font style, size, colour and so on in the editor. Tables, links and pictures can be inserted. HTML Templates should not be edited in Puzzel Ticketing.

### Email Layout

---

Use Email Layout



### Mail Signature

---

#### Signature



Ticket replies will have this signature appended automatically to the bottom of the responses.

Cancel Save

The Channel email signature is created using the editor. Where this is blank no signature is added. Where a signature is created this will automatically be added to the bottom of all emails sent through this channel. A user signature will sit above a channel signature.

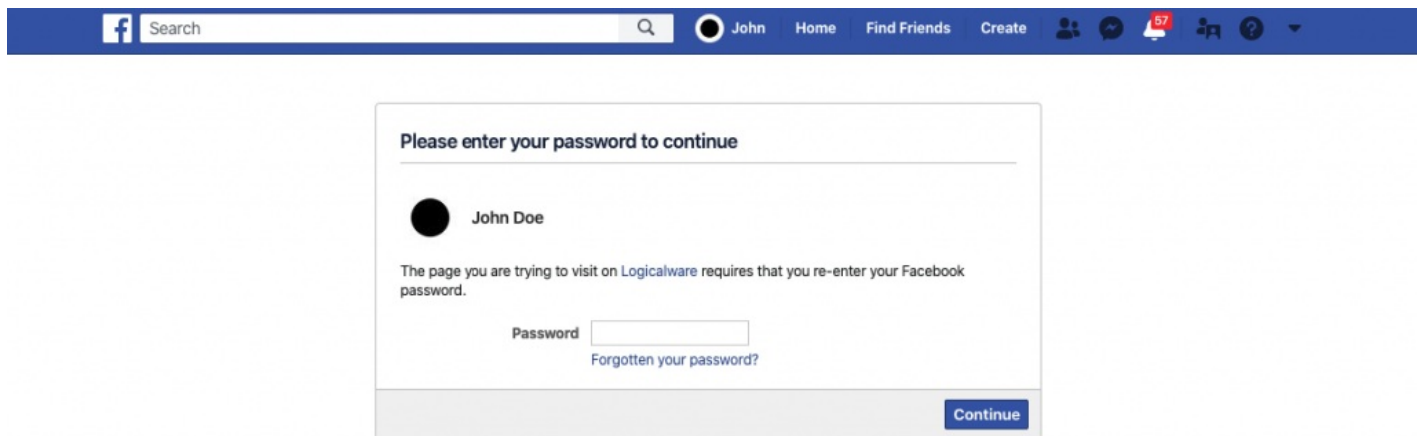
## Create Facebook Ticket Channel(standalone)

To add a new Facebook Channel, you must have the sign-in credentials for a Facebook User with admin access to the Facebook page you want to add.

The following activity can be received to Puzzel Ticketing from Facebook:

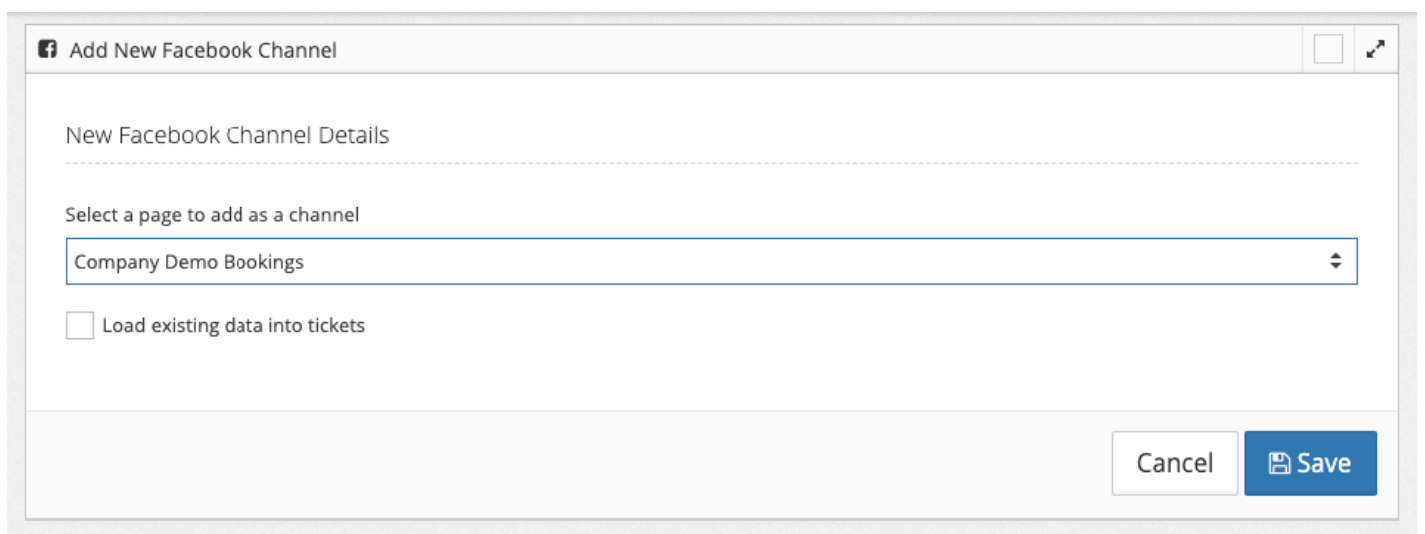
- Wall Posts
- Comments to Posts
- Replies to Comments
- Private Messages
- Recommendations

Go to: **Settings -> Ticket Channels -> Facebook** and click on **New Facebook Channel**. You will be redirected to the Facebook Login page. Enter the credentials for your Facebook User.



Continue to add the Puzzel Ticketing app to your Facebook User and allow all Permissions to your Facebook Pages. You can restrict which Pages Puzzel Ticketing has access to.

Once completed, you will be redirected to your Puzzel Ticketing account. Select the Page you want to add from the dropdown list.



Select the **'Load existing data into Tickets'** option to load all Facebook activity from the past 1-month.

**"Save"** to add this Facebook page to your Puzzel Ticketing account.

All approved activity will now be received to Puzzel Ticketing.

#### Note

Some activity cannot be received because the Customer's Facebook Profile may be set to Private. This is determined by Facebook.

## Create Instagram channel

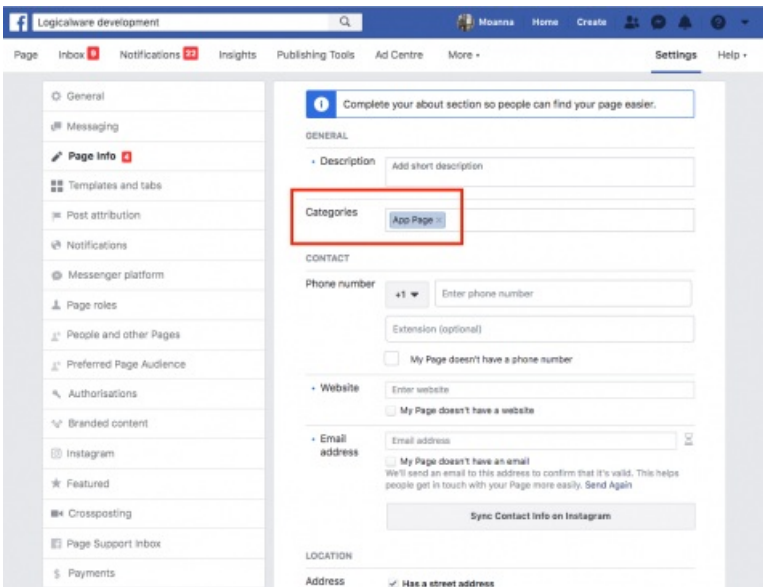
To add an Instagram channel, you will need:

- Facebook App
- Facebook Page
- Instagram Business Account or Instagram Creator Account
- A verified Facebook Business

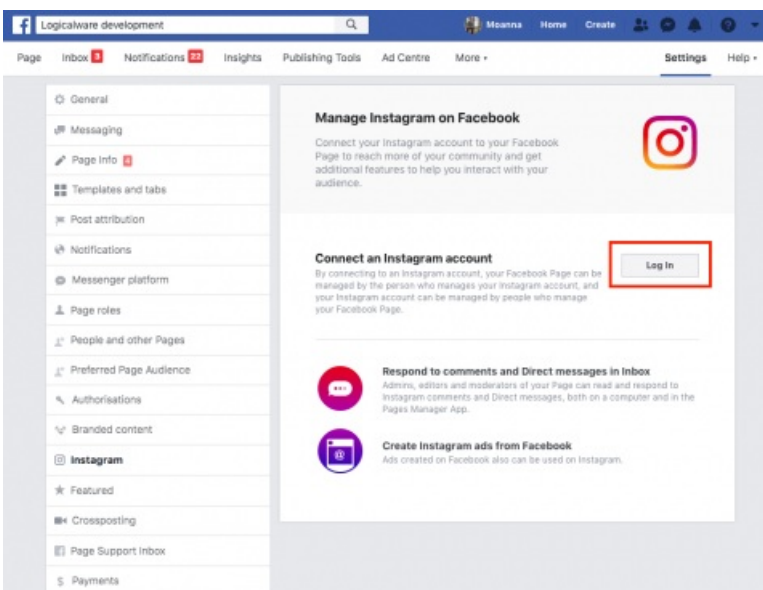
### Configure Facebook page

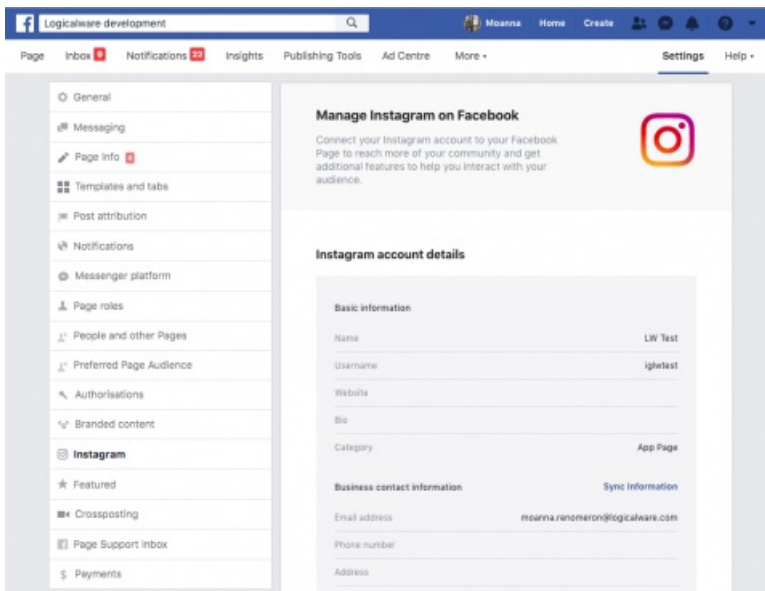
To configure the Facebook Page:

1. Edit the Page info of your Facebook page and ensure that the category selected is "App Page" so that it will be recognisable by your Facebook app later on.



2. Connect your Instagram Business Account or Instagram Creator Account

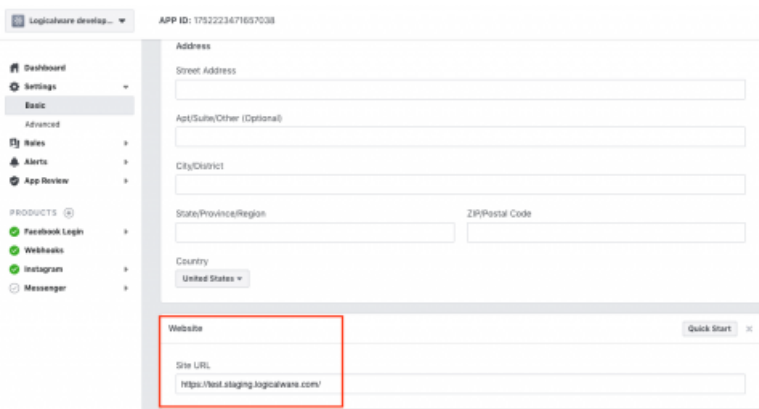
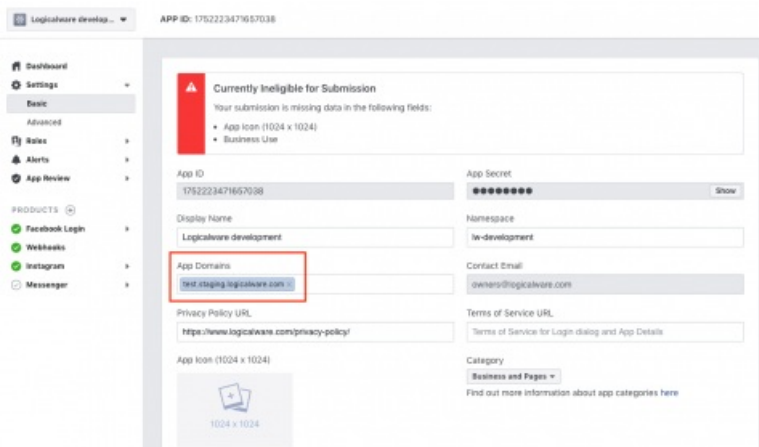




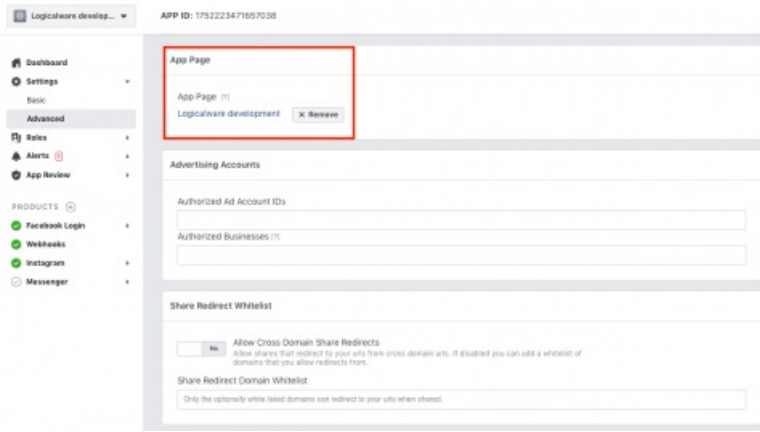
## Configure Facebook App

To configure Facebook App, do the following:

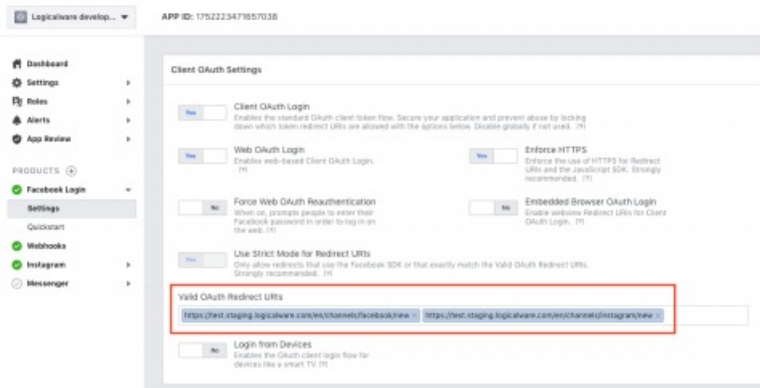
1. Go to Settings -> Basic, provide the https URL of your site into App Domains and Site URL fields



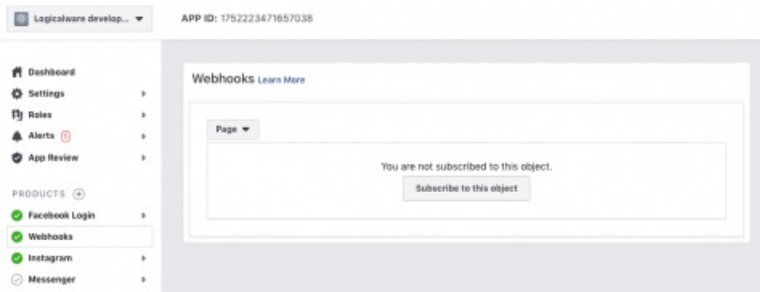
2. Go to Settings->Advanced and scroll down to **App Page** section and connect/select your Facebook page



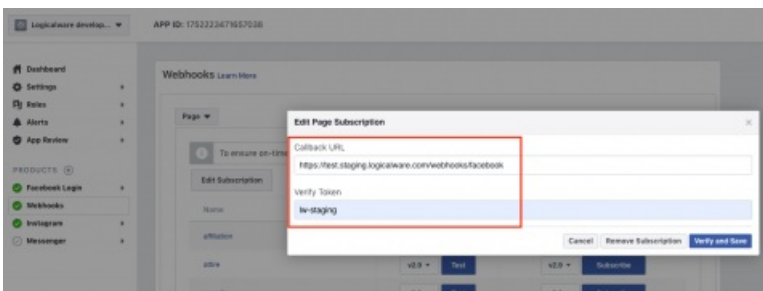
3. Then configure the Products starting with Facebook Login. In Settings, provide the Valid OAuth Redirect URIs for our channels (e.g. <https://test.staging.logicalware.com/en/channels/facebook/new> and <https://test.staging.logicalware.com/en/channels/instagram/new>)



4. Subscribe to Webhooks objects if your app is not subscribed to any yet.



5. If already subscribed to webhooks, you can just edit the subscription to ensure that proper values were provided. In this case, we'll focus on Page, Permissions and Instagram objects and provide the webhook's **Callback URL** (<https://test.staging.logicalware.com/webhooks/facebook>) and **Verify Token** (lw-staging). Verify and Save the objects.



6. Ensure that you are also subscribed to necessary Webhook endpoints for each object

Object	Endpoints
Page	conversations, feed, ratings
Permissions	manage_pages, pages_messaging, publish_pages, instagram_basic, instagram_manage_comments, instagram_manage_insights
Instagram	comments, mentions, story_insights



- Dashboard
- Settings
- Roles
- Alerts
- App Review

- PRODUCTS
- Facebook Login
  - Webhooks
  - Instagram
  - Messenger

### Webhooks [Learn More](#)

Instagram

To ensure on-time updates, use the same API version for every subscribed field on this object.

[Edit Subscription](#)

Name	Test	Subscribe
comments	v2.9 <a href="#">Test</a>	v2.9 <a href="#">Unsubscribe</a>
members	v2.9 <a href="#">Test</a>	v2.9 <a href="#">Unsubscribe</a>
story_insights	v2.9 <a href="#">Test</a>	v2.9 <a href="#">Subscribe</a>

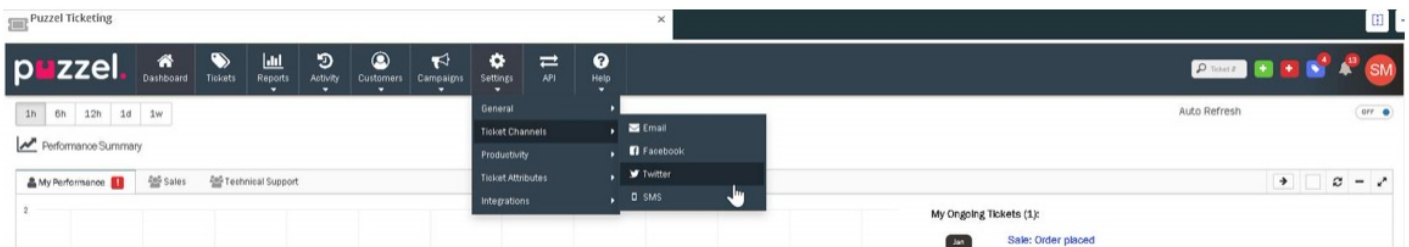
## Create new Twitter Channel(standalone)

To add a new Twitter Channel, you must have the sign-in credentials for the Twitter account you want to add to Puzzel Ticketing.

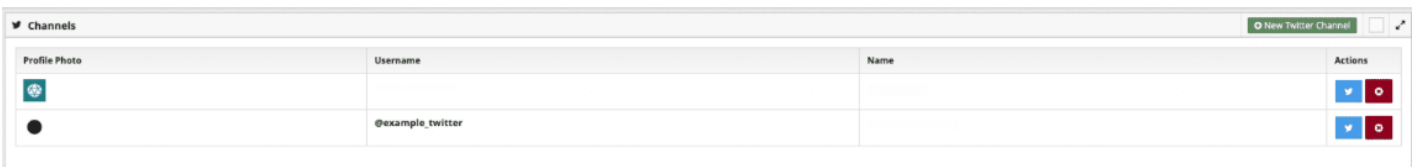
The following activity can be received to Puzzel Ticketing from Twitter:

- Posts
- Mentions
- Replies
- Direct Messages

Go to: **Settings > Ticket Channels > Twitter**, and select [New Twitter Channel](#). You will be redirected to the Twitter Login page. Enter the credentials for your Twitter account.



Continue to add the Puzzel Ticketing app to your Twitter account and allow all permissions. Once completed, you will be redirected to your Puzzel Ticketing account. Your Twitter account will be automatically added to Puzzel Ticketing as a Twitter Channel.




All approved activity will now be received to Puzzel Ticketing.

## Create SMS Ticket Channel

### Create a new SMS channel:

To create a new SMS channel,

1. Go to: **Settings > Channels > SMS.**
2. Click the  button on the top right.
3. Give the SMS Channel a recognisable name
4. Click the blue "Browse" button.
5. Select a number you like the look of. (If you don't care about how the numbers look or sounds, you can just select any number.
6. Click Save.

### Warning

A warning message will be shown stating that creating a new SMS channel will add a charge to your invoice. If you're sure you want to create a new SMS channel, click "Confirm". **Be aware the unlike other channels in Puzzel Ticketing, SMS is a paid for service.**

### To start using your SMS channel:

1. Create a new manual ticket from the green "+" button at the far top right, in the menu header.
2. Enter a Subject name.
3. Select a Team to assign this Ticket to.
4. Click the green "+ Start Conversation" button.
5. Select an SMS channel from the drop-down list of available channels. (you may need to scroll down.)
6. Enter the phone number you wish to send an SMS to, ensuring it uses the international format. E.g. '+447...' for UK Numbers.
7. Type your message and send.

OR

1. Receiving an SMS message to the number shown on the SMS Channel settings page will automatically create a new Ticket.
2. Assign this Ticket so a User if it isn't already.
3. Click "Reply" to send an SMS message in response if required.

In order to make sure the next SMS message from an existing SMS contact creates a New Ticket, make sure to **Close** the existing ticket with that customer after Ticket is **'Resolved'**.

### Note

Don't Forget to add New Ticket Rules for SMS channels if required.  
Go to: **Settings > Productivity > New Ticket Rules > SMS**

## Setting Business Rules

Productivity settings can be hugely effective in making Puzzel Ticketing maximise efficiencies and customer experience through advanced routing and controls, along with customisable actions and settings. This section covers the following topics about setting rules.

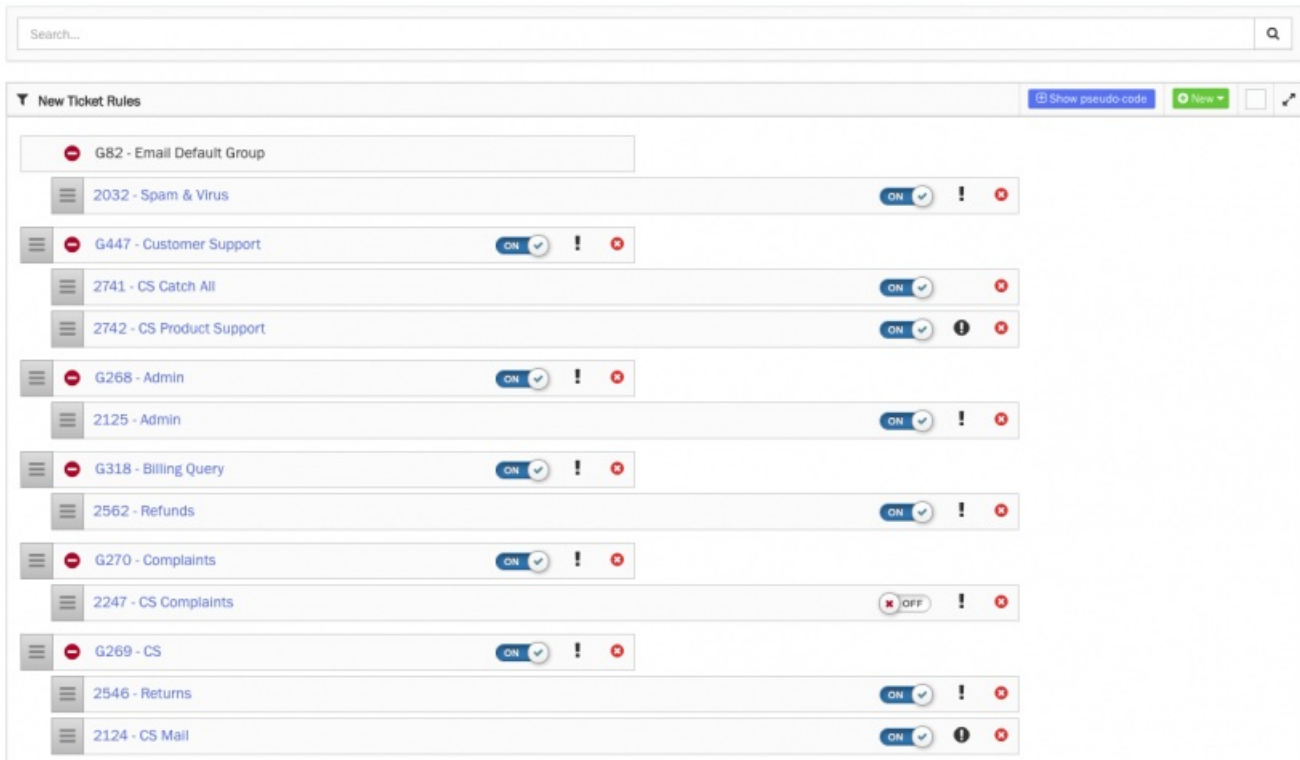
- [Ticket Rules](#)
- [Creating New Ticket rule](#)
- [New Ticket Rule Group](#)
- [Working hours & Days](#)
- [Templates](#)
- [Event Rules](#)
- [Forms and Form fields](#)

## Ticket Rules

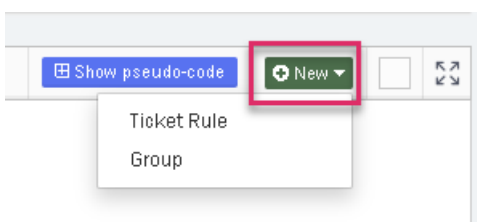
Ticket rules determine what happens to the new tickets arriving/created in Puzzel Ticketing. Each rule consists of conditions and predefined actions that are automatically applied to the ticket if conditions are met. These are found in:

Settings->Productivity->New Ticket Rules.

There are separate new ticket rules for different channels such as SMS, email.



To create a new rule/ group click on the **New** drop down option on the top right corner of the screen.



It is recommended that Rules are captured in Groups such as G82 – Email Default Group as shown in the picture above. By clicking on a Rule this will Expand to show the rule and the detail within as below.

☰ G318 - Billing Query ON ✓ ! ✖

☰ 2562 - Refunds ON ✓ ! ✖

If any of the following conditions are met:

- Message Content contains any of **refund,pay me back,back pay,outstanding**

Then:

- Assign to team: **Accounts and Billing**
- Set priority to **high**
- Set response target to **36 hour(s)**
- Set resolve target to **5 day(s)**
- During working hours send automatic reply using template **Billing Manual Response Template, without channel signature, with incoming message**
- Outwith working hours send automatic reply using template **Credit Note, without channel signature, with incoming message**
- Pre-populate response for first reply using template **Contact Response**
- Tag with category **Billing Type - Refund**
- Tag with **Test**
- Send Template **Hello** if no reply after **2** hours, using channel **admin**
- **Resolve** after last Follow-Up
- Send Template **Credit Note** if no reply after **10** hours, using channel **admin**
- **Resolve** after last Follow-Up
- Send Template **Credit Note** if no reply after **1000** hours, using channel **admin**
- **Resolve** after last Follow-Up

**Stop** checking further rules if the conditions of this rule are met.

## Note

The rule can be activated/deactivated by toggling the blue button on the right.

You can also edit the rules by clicking on it.

## Creating New Ticket rule

When a new message is received in the account, Puzzel Ticketing checks to determine if the message is part of an existing ticket. If not, a new ticket is created which is checked against the Group and Ticket Rules.

By default a rule is built into the system called Email Default Group which cannot be deleted. This has no conditions and acts as a catch all such that its actions are always applied to tickets. This is to ensure that all tickets are assigned to a team should you not create any additional rules.

It is also how to set virus and spam conditions as this will apply to all traffic.

A specific Spam Flag, Virus Flag and Blacklisted condition exists and an example of how to set this up is shown below:

If either Spam or Virus flags are detected, no further checks are made instead the Actions are undertaken. As the ticket assignment is OFF and instead the ticket is set to Junk and Closed status. This means it will not then be picked up for work by an agent.

No SLA is set on Response or Resolve target. No Categories or Tags are assigned.

And no Auto responses are set (Business Hours, Outside Business Hours) with no Follow Up Messages or Automatic Scheduled Tasks.

To setup or edit a rule, you need to:

1. Give a name to the rule
2. Select Any or All of the following conditions are met according to your requirement
3. Add the condition by clicking on the **+ Add condition** icon and define the rule to be matched
4. Tick to stop checking for any other conditions if this rule is met

**New Email Rule**

Rule Details

**Name**

**Put out of action**  
 Rule is disabled

Rule Conditions

If **all** of the following conditions are met:

**Channel** is equal to **ticket**

Stop checking further rules if the conditions of this rule are met.

Stop checking further groups if the conditions of this rule are met.

5. Select the team to assign to. Can also be assigned to User depending on Channel settings.
6. Set Priority of the ticket : Highest to Junk
7. Set Status : Open, Pending, On-Hold, Resolved, Closed. For example tickets that will not be handled can go straight to Resolved or Closed (a Closed ticket cannot be reopened).
8. Set Response and Resolve Targets based on SLA
9. Set Categories and Tags : Automatically assign for high level reporting
10. Set different auto responses for Business and Outside of Business Hours. Working Hours must be set for this to operate.
11. Set up follow up messages. Read for more details on [Setting up Follow up messages](#)
12. Set up Scheduled tasks.

Rule Actions

**Ticket Attributes**

Assign to Team

Set Priority

Set Status

Set Response Target

Set Resolve Target

Assign Categories

Assign Tags

**During Business Hours**

Send automatic reply

Do not include channel signature in auto-reply  
 Include incoming message after chosen template in auto-reply

**Outside of Business Hours**

Send automatic reply

Do not include channel signature in auto-reply  
 Include incoming message after chosen template in auto-reply

**Follow Up Messages**

Send Template

If no reply after  hours

Using Channel

Resolve after last Follow-Up

**First Contact**

Pre-populate first reply

**Scheduled Tasks**

Input comment/note

Task Allocation

If no reply after  hours

13. Click Save



## New Ticket Rule Group

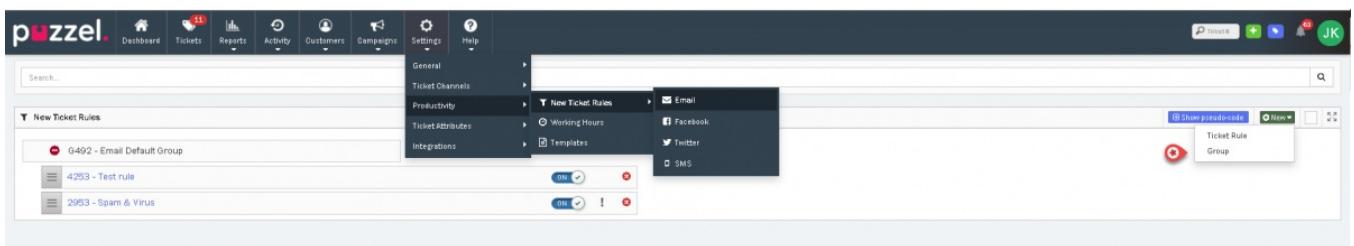
It is recommended that ticket rules are organised and contained within ticket groups. This makes it easier to setup and manage ticket rules as the Groups are checked in sequence.

In addition the Groups can be given their own conditions. If these are not met at Group level, then the individual ticket rules within that Group do not apply.

Also it is possible to stop checking further Groups if all/any conditions of a Group are met. This allows rules to be very controlled and specific, therefore very powerful if required as they can identify almost unlimited conditionality and therefore actions thereof.

To add a new Ticket Rule Group, you need to:

1. Go to Settings->Productivity->New Ticket Rules and select the channel.
2. On the New Ticket Rules page click on **+ New** on the right and select **Group**



3. Give your Group a name and add any/all conditions to determine if this Group should apply. If so, should no further groups be checked if the conditions are met?

**Group Details**

---

**Name** Put out of action

Channel   Group is disabled

**Group Conditions**

If **any** of the following conditions are met:

Channel  is equal to  admin

Stop checking further groups if the conditions of this group are met.

### Note

Please note that If no conditions are added to the Group then the Ticket Rules will be applied.

4. Click **Save**.

**Groups are always checked in the top to bottom order. Click and Drag Rules and Groups to order them by your preference.**

## Working hours & Days

Working hours is located under Settings->Productivity->Working Hours.

It is important that these are set to maximise other features in Puzzel Ticketing. SLA's only calculate during working hours and through the business hours the calculation is carried out.

Default Working Hours are provided.

Business Hours								<a href="#">New Timetable</a>	2	<input type="checkbox"/>	
Name	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Actions			
Default Working Times	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	00:00 - 00:00	00:00 - 00:00	<a href="#">Edit</a>	<a href="#">Delete</a>		
Early shift	08:00 - 17:00	08:00 - 17:00	08:00 - 18:00	08:00 - 17:30	09:30 - 18:00	00:00 - 00:00	00:00 - 00:00	<a href="#">Edit</a>	<a href="#">Delete</a>		

To set up a new timetable or edit an existing click on appropriate button.

In addition Work Holidays are added here. These are typically Public Holidays and when set customers received the out of hours auto response and these days are not included in SLA calculations.

### ***Include screenshot***

**Working Hours**

**Working Hour Details**

Name:

Monday: 08:00 - 17:00

Tuesday: 08:00 - 17:00

Wednesday: 08:00 - 18:00

Thursday: 08:00 - 17:30

Friday: 09:30 - 18:00

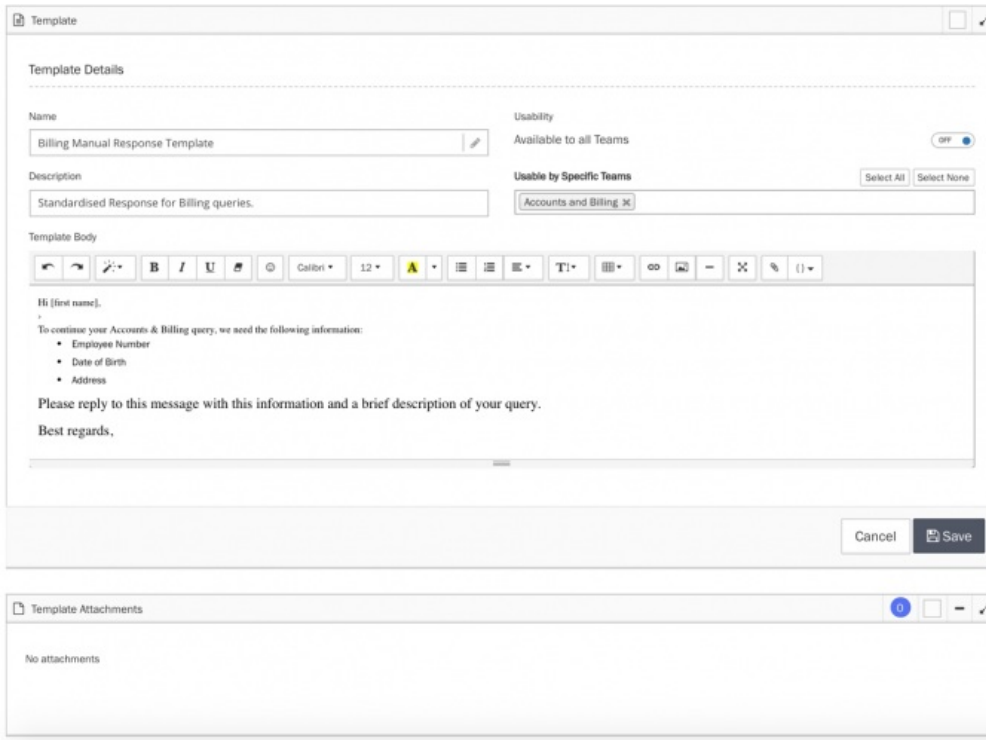
Saturday: 00:00 - 00:00

Sunday: 00:00 - 00:00

## Templates

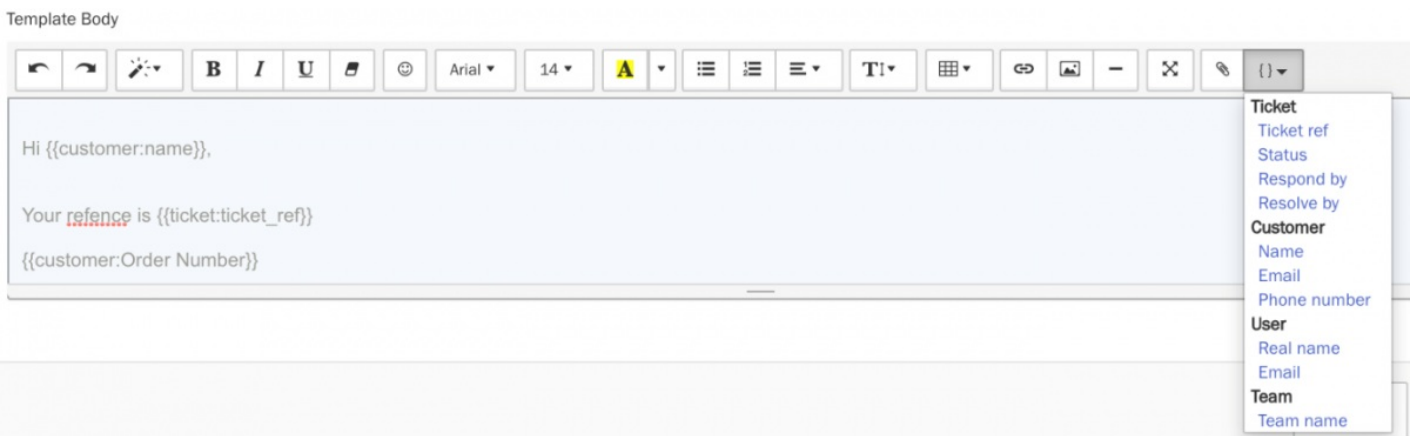
Templates are used to send automated replies, canned messages, automatic follow-ups, pre-populated first response and provide scripted answers for consistent approach.

Both SMS and Email templates can be created; templates are located at Settings->Productivity->Templates.



- A template needs a name,
- It can be restricted to certain Teams,
- A description is helpful,
- Files or pictures can be attached, or even HTML template included,

In the text editor placeholders are used to include customised information as shown below:



Custom attributes can also be used with Placeholders even though they're not displayed in the available options under the Placeholder button.

To use Custom Attribute Placeholders in Templates or Campaigns you can manually type {{customer:xxx}} – enter the name of the custom attribute in place of 'xxx'.

For example if there were a custom attribute 'Policy Number' with a unique value for each Customer, this can autofill for template responses by typing: {{customer:policy\_number}}

## Event Rules

Event rules are automatic rules that are triggered when a specific event occur on a ticket. You can define the events to be team, user, priority, category and organisation change and set actions to be performed automatically once the criteria is met.

Unlike the business rules that are executed on automatic ticket creation, event rules come into play when you need certain actions to be taken spontaneously on the existing tickets based on a trigger.

### Creating new Event Rule group

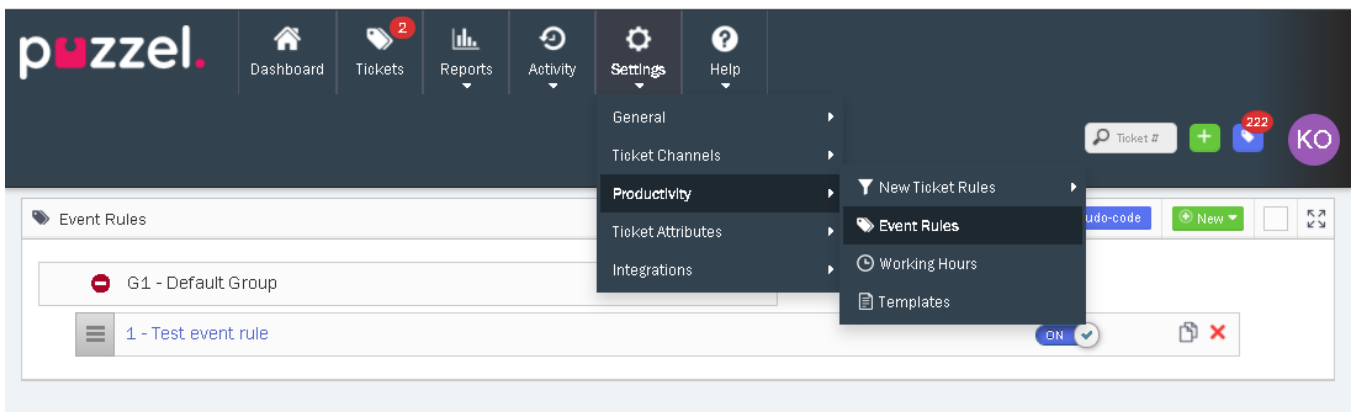
Event Rule group are a logical way of organising event rules so that it can be easily managed. It is recommended that event rules are organised and contained within event rule groups.

Furthermore, groups can have conditions of their own. If these are NOT met at group level, the individual ticket rules within that Group Do Not apply.

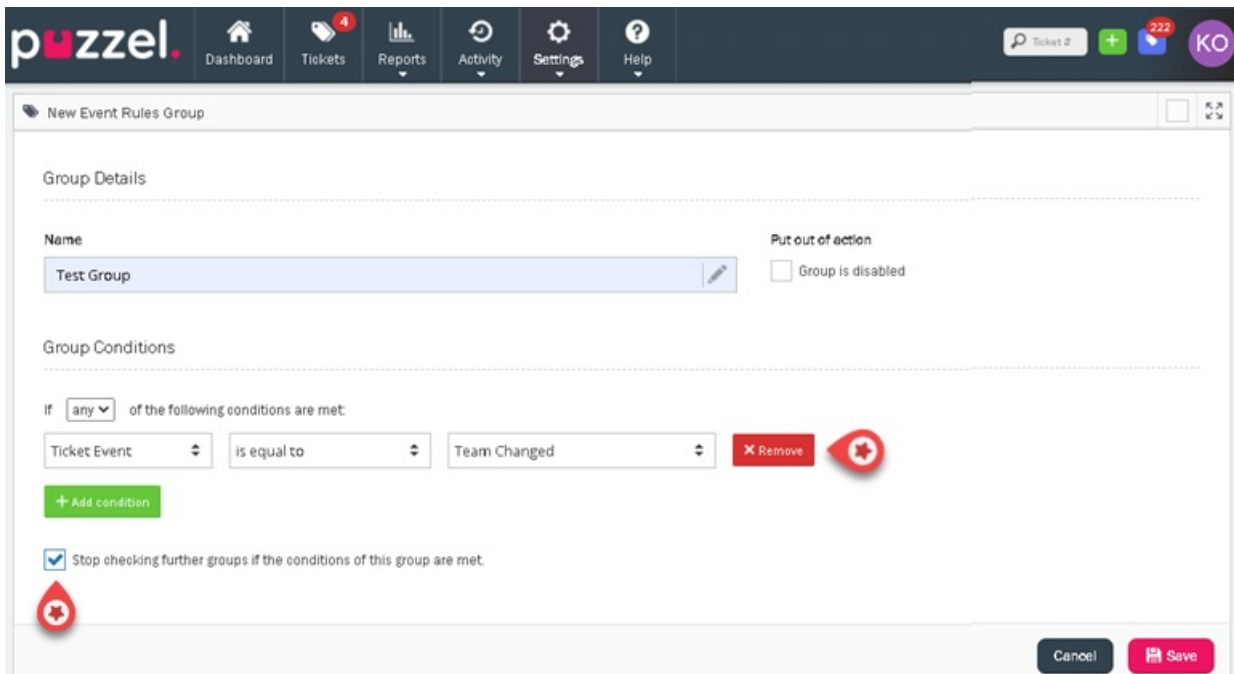
It is also possible to stop checking subsequent groups if all/any conditions of a group are met. This allows rules to be very specific and is executed in a controlled manner.

To create a new Event Rule Group:

1. Go to Settings-> Productivity-> Event Rules



2. Click on New -> Group
3. Enter the name of the group and specify the criteria to be met at group level
4. Select the “Stop checking further groups if the conditions of this group are met” option if you want no subsequent groups to be checked
5. Click **Save**.



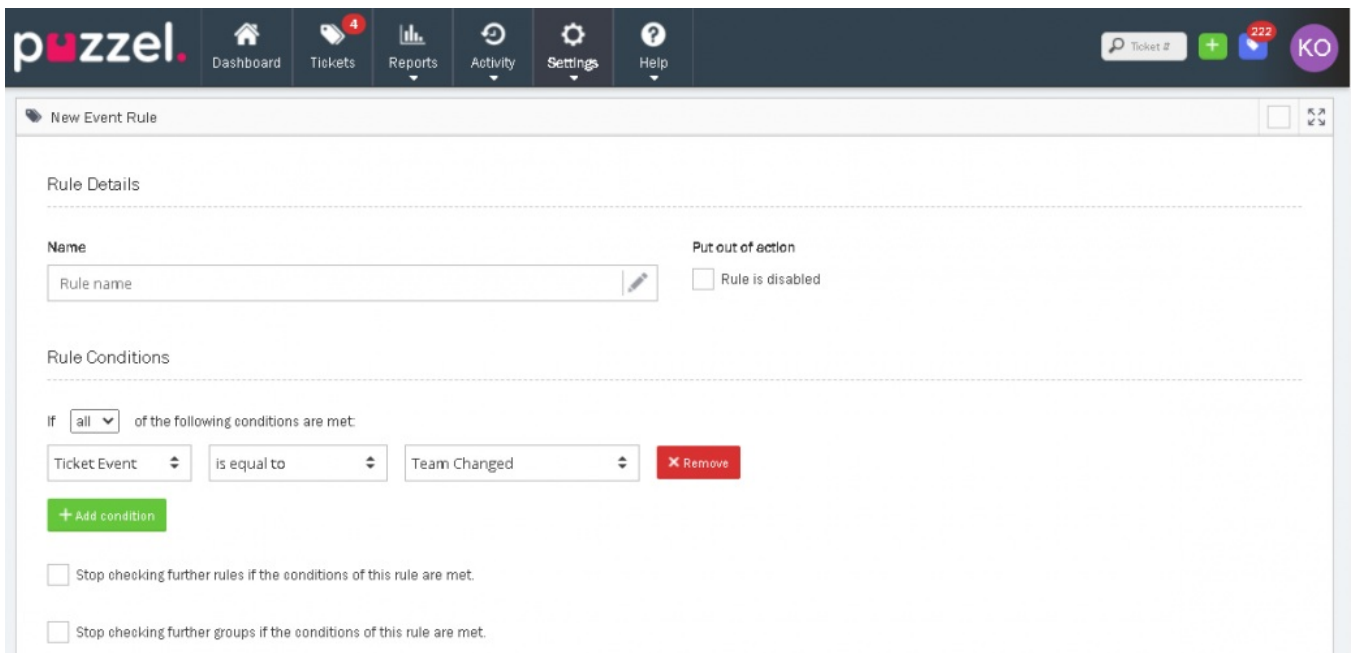
## Creating Event Rules

To create event rules,

1. Go to Settings->Productivity-> Event Rules.
2. Click on New -> Event Rule



3. Enter the rule name and specify the conditions to be met



4. You can choose to stop checking successive rules in this group or subsequent groups if this rule or group conditions are met.
5. Under Rule Actions, turn on the Set Response Target and Set Resolve Target
6. Define Rule Actions by setting the response target and resolve target for the event defined above. As seen in the

picture below, you could define actions for individual tickets or at the team or organisation level.

#### Rule Actions

Set Response Target



Ticket  Team  Organisation

minute(s)

Reset Response Target  ON

Set Resolve Target



Ticket  Team  Organisation

minute(s)

Reset Resolve Target  ON

7. Click Save.

## User scenario on how to use Event Rules:

### Scenario 1:

As a user, I would like the response/resolve SLA to be changed when an agent moves from Team A to Team B with a different set of priorities. This can be achieved in three steps as explained below:

1. Apply team based SLA
2. Create Event Rule
3. Change the team of the agent assigned on the ticket to see the new response/resolve targets.

### Apply team based SLA

To set the SLA for each team,

1. Go to Settings -> General -> Teams
2. Edit the team you wish to set the SLA to

The screenshot shows the Puzzel application interface. The top navigation bar includes 'Dashboard', 'Tickets', 'Reports', 'Activity', 'Settings', and 'Help'. The 'Settings' menu is open, showing options like 'General', 'Ticket Channels', 'Productivity', 'Ticket Attributes', and 'Integrations'. The 'Teams' option is selected, leading to a table of 'Registered Teams'. The table has columns for 'Name', 'Users', and 'Actions'. The 'Users' column shows icons for agents with status indicators (green checkmark or red X). The 'Actions' column contains 'Edit' and 'Delete' buttons.

Name	Users	Actions
All Users	KO MY EIJ GT MS VT CB	Hold tickets in Team for manual assignment or collection [Edit]
Admin portal - PCC	KO MY EIJ GT MS VT CB	Hold tickets in Team for manual assignment or collection [Edit] [Delete]
Gelangel	MY EIJ GT MS VT CB KO	Hold tickets in Team for manual assignment or collection [Edit] [Delete]

3. Under **Ticket Reply** Options, set the Response and/or Resolve target (say 1 day)
4. Click **Save**

## Ticket Reply Options

Text to insert into the ticket subject

Ticket number: #%T

Delay replies until next working hours

Queue replies sent outside of work hours

NO

Set Response Target

ON

1

day(s)

Set Resolve Target

ON

1

day(s)

## Note

You can do a similar process with the Organisation as well.

## Create Event Rule

To create new event rule, follow the instructions in the [Creating Event Rules](#) section and mark the condition as **Ticket Event is equal to Team Changed**. Then select Team for Set Response/Resolve Target under Rule Actions and Click Save.

## Rule Actions

Set Response

ON

Ticket

Team

Organisation

Target

Reset Response Target

ON

Set Resolve Target

ON

Ticket

Team

Organisation

Reset Resolve Target

ON

Finally change the team of the agent assigned to a ticket to see the change in SLA.

The screenshot shows the Puzzel ticket management interface. The top navigation bar includes Dashboard, Tickets, Reports, Activity, Settings, and Help. The main content area displays a ticket for 'Chuck Norris' with the subject 'preferred IDE is hexedit'. The ticket details include 'Ticket #109', 'Priority: HIGHEST', 'Priority Score: 100', 'Status: OPEN', 'Respond By: 30 minutes', and 'Resolve by: 30 minutes'. The 'Respond By' and 'Resolve by' fields are highlighted with a red box. The 'Timeline' section shows an email from 'Customer' to 'Cynthia Schroeder'. The 'Attributes' panel on the right shows 'Organization: Vizsla 000', 'Team: All Users', 'Assigned To: Unassigned', and 'Priority: Highest'. The 'Forms' panel shows 'Form: Services - Admin portal' and 'Services: Option 1'. A 'Save' button is visible in the bottom right corner of the Attributes panel.

## Scenario 2:

As a user I need to be able to change the Response/Resolve SLA whenever I change priority of a ticket. Assumption is made that each priority level will have its own SLA.

Follow the steps in the [Creating Event Rules](#) section and

- Add 2 conditions: Ticket Event is equal to Priority Changed and Priority is equal to Highest
- Under Rule Actions, turn on the Set Response Target and Set Resolve Target
- Select Ticket for both options.
- Set the Response/Resolve target to, say, 1 day.
- Click Save

#### Rule Actions

Set Response Target



<input checked="" type="radio"/> Ticket	<input type="radio"/> Team	<input type="radio"/> Organisation
---	----------------------------	------------------------------------

<input type="text"/>	minute(s) <input type="text"/>
----------------------	--------------------------------

Reset Response Target  ON

Set Resolve Target



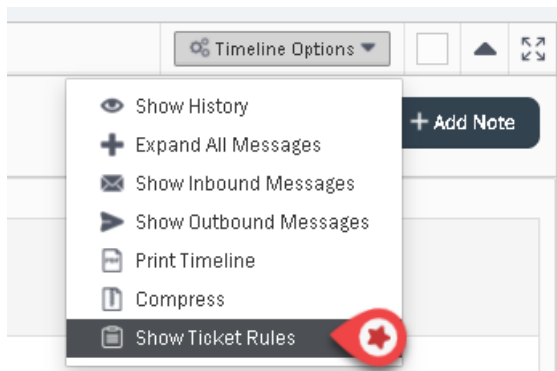
<input checked="" type="radio"/> Ticket	<input type="radio"/> Team	<input type="radio"/> Organisation
---	----------------------------	------------------------------------

<input type="text"/>	minute(s) <input type="text"/>
----------------------	--------------------------------

Reset Resolve Target  ON


Finally change the priority in the ticket to see your new response/resolve targets.

To see all the rules that has been applied to a ticket, open a ticket and go to Timeline Options -> Show Ticket rules



This will display a list of all the rules applied on the ticket.




February 04, 2021 16:54  Rules applied: G1\* (Test event rule\*), G2\* (Test event rule 1\*, rule 2 of grp 2\*)


February 04, 2021 16:54  Rules applied: G1\* (Test event rule\*), G2\* (rule 2 of grp 2\*)


February 04, 2021 16:54  Rules applied: G1\* (Test event rule\*), G2\* (rule 2 of grp 2\*)

February 04, 2021 16:54  Rules applied: G1\* (Test event rule\*), G2\* (rule 2 of grp 2)

February 04, 2021 16:48  Rules applied: G1\* (rule 2 of grp 2\*, Test event rule\*), G2\* (Test event rule 1)

February 04, 2021 16:48  Rules applied: G1\* (rule 2 of grp 2\*, Test event rule), G2

February 04, 2021 16:48  Rules applied: G1\* (rule 2 of grp 2\*, Test event rule\*), G2\* (Test event rule 1\*)

January 25, 2021 08:25  From: Customer [customer@company.com](mailto:customer@company.com)  
To: Cynthia Schroeder [terrill@jeason.info](mailto:terrill@jeason.info)

## Note

1. Working hours and days are respected by the Event rules. For more details read [this](#) article.
2. The event changes are also recorded under Activity log

## Key points about Response Target

- If the last message is outbound the **Respond by** parameter will be calculated using the time the next inbound message arrives
- If selected, and the last message is inbound (ie nobody has responded yet) then **Respond by** will be calculated using the current time
- If NOT selected, and the last message is inbound (ie nobody has responded yet) then **Respond by** will be calculated using the time the last message arrived

## Key points about Resolve Target

- If selected, **Resolve by** is calculated from the current time
- If NOT selected, the **Resolve by** is calculated from the last time the ticket was opened.

## Forms and Form fields

Ticket form is a set of predefined ticket fields that serves a specific support request. These bits of information give the agent a deeper insight into the support ticket and enables them to resolve the ticket quickly.

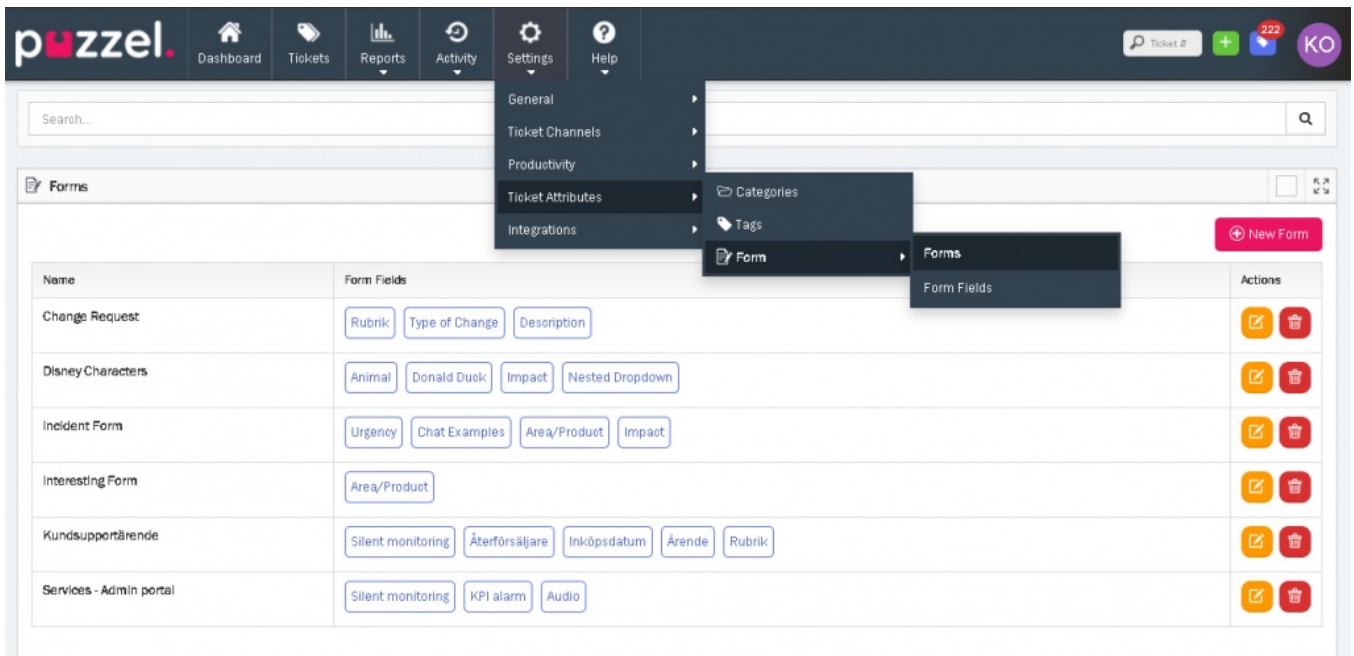
The forms and form fields can be also be used to filter the tickets so that it can all be listed and dealt with swiftly and efficiently.


You can create multiple forms to suit different support requests. For example, you can create different forms with different fields for different products/services.

### Creating a Form

To create a new form, you need to:

1. Click on Settings->Ticket attributes->form->forms. This will display the list of all forms currently available. Please note that this space could be empty to begin with



2. Click on the  icon to create a new form.
3. Enter the name of the form and select the teams that are allowed to use this form and click **Save**. This takes you to the **Edit form** screen where you can add the form fields.
4. Note that the Name and Associated team is auto populated from the previous screen. You can now choose the fields from the available list or create your own. Please see the [Form fields](#) section for more details on creating a form field. To use the existing one, scroll through the list and click on it or search for the field name from the search bar and click on it. Note that this list will be empty to at start.
5. Click **Save**.

### Form Fields

Form fields are individual parameters in a form. The properties of each of these form fields are set at the field level (not the form level). Hence a form field's properties will remain the same in all forms where these fields are used.

## Note

You cannot set form-specific properties for a field. i.e if you have set a field to be required, it will remain required on all ticket forms where it is used. You cannot make the field required on one form but optional on another.

## Adding fields to forms

You can add fields to existing forms or to new forms being created. There are three types of form fields as listed below:

1. Free text
2. Drop-down
3. Nested drop-down

### Free text field

This field will allow you to add some notes or description about the ticket. To add a Free text field, click on icon which opens a dialog box on the right.

+ Free Text



The screenshot shows a dialog box titled "Free Text" with a close button (X) in the top right corner. Inside the dialog, there are three input fields: "Label" with the value "Notes", "Help text" with the value "Include additional information", and a "Required" checkbox which is currently unchecked.

Enter the Label name and help text for the field if needed. You can also make this field mandatory by selecting **Required** option.

### Drop-down field

You can create a drop-down list with options for an agent to choose from. To create the drop-down field, click on

+ Dropdown

icon to open the **Dropdown** dialog box on the right.

Dropdown

Label

Services

Add option

Option 1

Option 2

Option 3

Help text

You have 3 option for services

Required

Enter the Label name and the option name in the Add option box and click on . You can add more options to create a list. Provide the help text to explain the list if necessary and select Required if the field needs to be mandatory.

You can also arrange the options in the list by dragging the icon against the option you want to move.

#### Nested Drop-down field

You can also create a nested drop-down field by clicking on the to open the Nested dialog on the right.

Nested

Label

Example nested drop-down

Add option

Option A

Add new form fields or Add existing form fields

Help text

Required

Enter the Label and the option name in the **Add option** box and click on icon. This gives you further opportunity to add fields that are nested inside Option A.

## Note

Nested option can only be one level deep.

You can either create a new field or select from the existing ones in the system. By clicking to add new fields, it opens the Form fields screen where you can add Free text or drop-down field. Click **Confirm**.

### Form Fields

Choose form field


Click components to right side

+ Free Text    + Dropdown

**Confirm**

## Filtering tickets on forms and form fields

You can filter tickets based on forms and/or form fields. Go to **Tickets** page and select Forms tab at the top. Enter the form/forms name and/or field name you wish to filter and click **Submit**. This will display a list of all tickets that satisfy these criteria.




 **Chuck Norris can unit test an entire application with a single assert.** Assign To Me

via paper-forest-products-80506509c7d8  
Ticket #108

Priority: **NORMAL**    Priority Score: **20**    Status: **OPEN**

---

**Timeline** Timeline Options + Add Note

- February 02, 2021 14:18  Form fields added: \*Audio\* with answer \*dfg\* by Kerry Okl
- February 02, 2021 14:18  Form changed from n/a to Services - Admin portal by Kerry Okl
- January 25, 2021 08:26   
**From:** Customer [customer@company.com](mailto:customer@company.com)  
**To:** **Caterina McKenzie**  
[marcelle\\_goyette@mckenziegoldner.biz](mailto:marcelle_goyette@mckenziegoldner.biz)

D'Artagnan had more than once related to his friends his adventure with the stranger, as well as the apparition of the beautiful foreigner, to whom this man had confided some important missive. The opinion of Athos was that d'Artagnan had lost his letter in the skirmish. A gentleman, in his opinion--and according to d'Artagnan's portrait of him, the stranger

## Creating reports using forms through report builder

You can now create reports in the Report builder using the Form and Form field elements. For more details, read the article on [creating a report using a report builder](#).

The screenshot shows a progress bar at the top with six steps: 1. Details, 2. Conditions (highlighted in red), 3. Filters, 4. Columns, 5. Scheduling, and 6. Summary. Below the progress bar, the text reads: "Step 2 - Select the main element to be reported on and a breakdown. For example: *Report on: Teams, Breakdown by: Users.*"

The main interface consists of two dropdown menus:

- Report on:** A dropdown menu with a search bar and a list of options. The options are: "Select a target...", "User", "Team", "Channel", "Priority", "Tag", "Category", "Customer", "Customer Domain", "Status", "Ticket Performance", "SLA Analysis", "Team Performance", "User Performance", "Login", "Task SLA", "Form" (highlighted in blue), and "Form Field".
- Breakdown by:** A dropdown menu with the option "No Breakdown".

## Ticket Management

This section describes various activities an agent can perform with the tickets.

- [Creating a ticket](#)
- [Replying a ticket](#)
- [Adding tasks and notes](#)
- [Updating ticket status](#)
- [Bulk actions](#)
- [Automatic team assignment](#)
- [Automatic follow-ups](#)
- [Creating an automatic reply](#)

## Creating a ticket

To create a ticket, you need to :

1. Click the green **+ New ticket** button at the top right corner of your screen to create a new ticket.



2. Enter the subject of the ticket and select the Team/Teams you want to assign the ticket to and click on **Save**.

Ticket Details

⌵ ⌵ ⌵

Subject

Team

All Users

Save

3. This opens a new window to enter more details about the ticket. Once you are done click on **Start conversation** button and choose a channel (ex: email) to open text editor.

Ticket #54
Resolve Ticket

Priority: Normal | Priority Score: 30 | Status: Open

Attributes

Team:

Assigned To:

Priority:

Status:

Tags:  | Post-it Note:

Categories

complaints:

Complaint type:

queue:

Task:

Save

Attachments

0
📎
🗑️
⌵

Timeline

Cannot assign rules to teams
Timeline Options
+

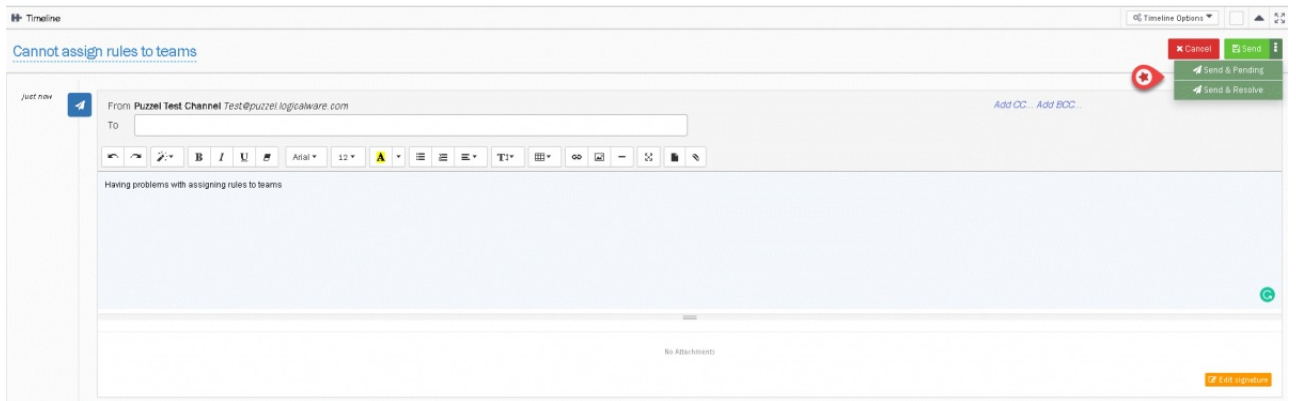
+ Add Task
+ Add Note
Start Conversation

- ✉️ Start with an Email
- 📧 Box2
- 💬 Text
- 🎫 Ticket
- 📱 Start with SMS
- 🗣️ Puzzel Test

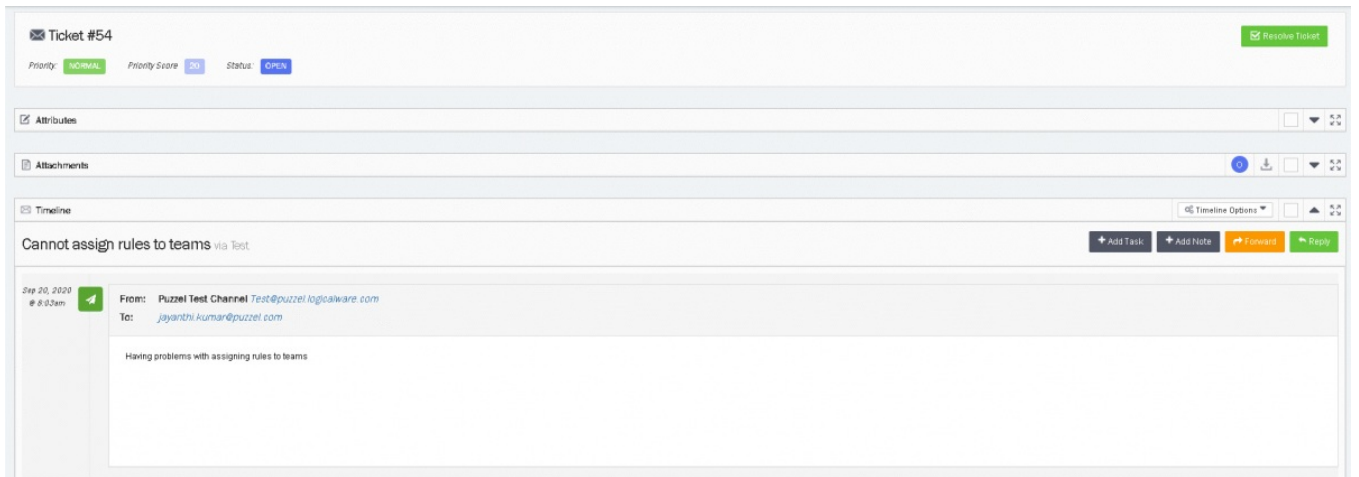
4. Enter the ticket details in the text editor and choose the option for sending the ticket to the system. There are three options as listed below:

- Send means the status will be Resolved
- Send as pending means the status is Pending
- Send as On-Hold means the status is On-Hold





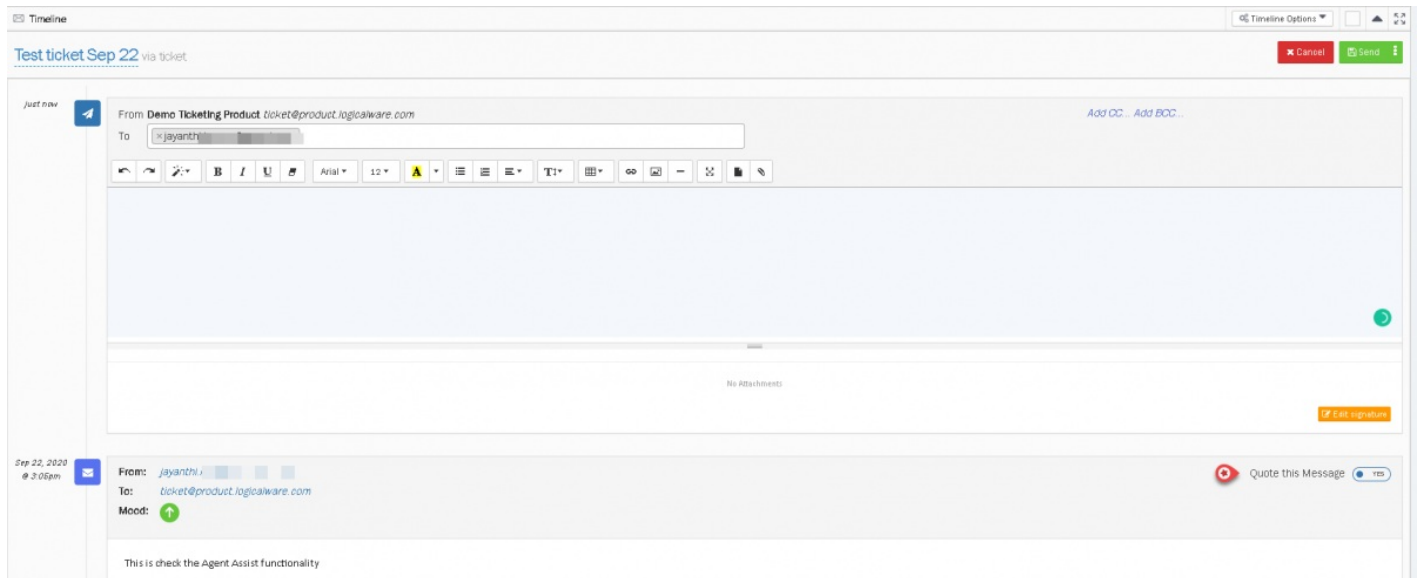
5. Now you can see your ticket has been created and email has been sent.



## Replying to a ticket

To reply to a ticket, you need to:

1. Go to ticket timeline on the tickets page.
2. Click reply to see the text editor



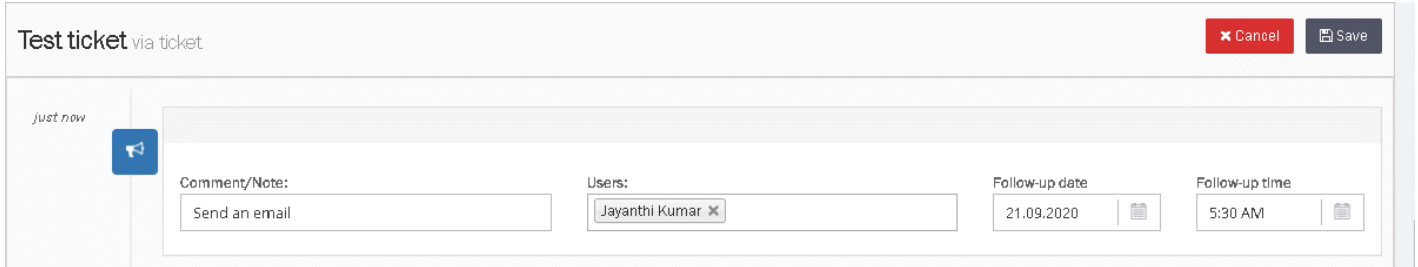
3. The To and cc (etc) are auto populated but can be amended. You can now start composing a message. You may type the email address or choose from the list you've added in the address book.
4. You can also edit signature by clicking the edit signature (unless this is locked down in permissions)
5. Upon completing the editing, you can click on send. Sending the reply has 3 options as listed below:
  - Send means the status will go to Resolved (i.e. ticket is handled)
  - Send as pending means the status is Pending (i.e. waiting on information from customer to be able to resolve)
  - Send as on-hold means the status is On-Hold (i.e. waiting on internal information)
  - The ticket status can be changed manually if required from the dropdown box

### Quoting a message

if you want to quote previous message, turn on the toggle found at the right part of the header of previous message as shown in the image above.

## Adding task and notes from a ticket timeline

To add a task or a note to a ticket, go to the Tickets page and select a ticket for which a task or note need to be added. Click on the **+ Add Task** icon for adding a task and also assigning to a user to it. Click **Save**.

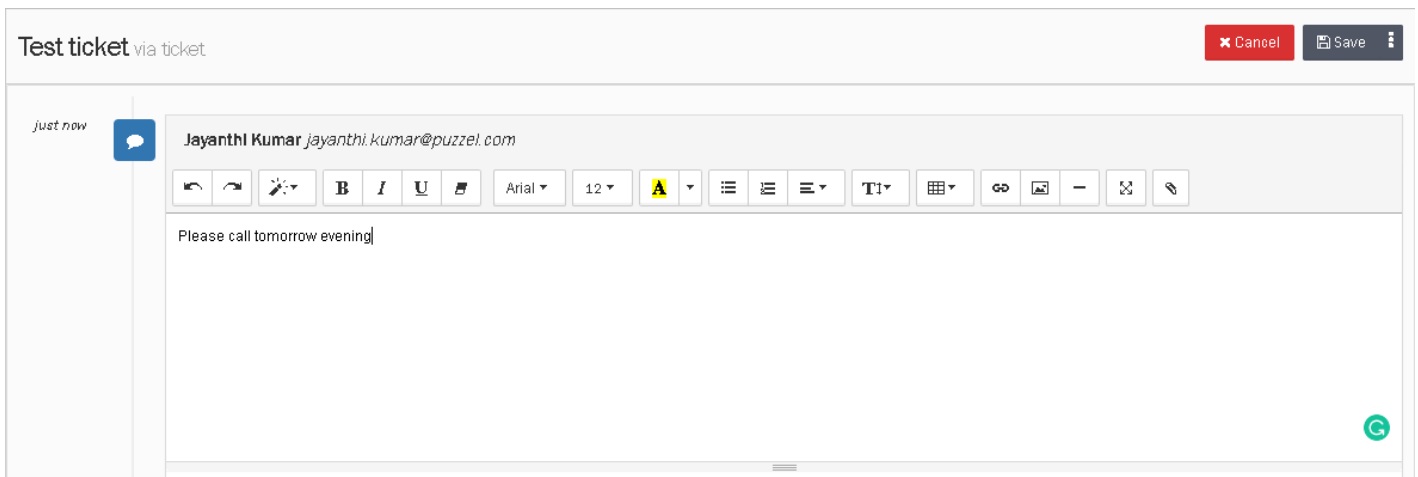


The screenshot shows a form titled "Test ticket via ticket" with a "Cancel" button and a "Save" button. The form is labeled "just now" and contains the following fields:

- Comment/Note:** A text input field containing "Send an email".
- Users:** A dropdown menu with "Jayanthi Kumar" selected.
- Follow-up date:** A date input field containing "21.09.2020".
- Follow-up time:** A time input field containing "5:30 AM".

Follow-Up Tasks can be seen by all Users that can view the Ticket. Tasks can also be assigned to different Users with a time & date. This is then added to their Dashboard calendar. A notification is sent to the User(s) at the selected time and date so that they are always informed of what they need to do and when.

To add a note, click on the **+ Add Note** icon, compose the note and save.



The screenshot shows a form titled "Test ticket via ticket" with a "Cancel" button and a "Save" button. The form is labeled "just now" and contains the following elements:

- Author:** "Jayanthi Kumar jayanthi.kumar@puzzel.com".
- Rich Text Editor:** A toolbar with various icons for undo, redo, bold, italic, underline, strikethrough, font color, background color, bulleted list, numbered list, indent, link, unlink, image, and video. Below the toolbar is a text input field containing "Please call tomorrow evening".
- Submit:** A green circular button with a white plus sign.

## Updating and changing Ticket status

To change the status of a Ticket, you need to :

1. Open the Tickets page and select the ticket you wish to change the status for.
2. Go to the Attributes section of the ticket and look for the status field.
3. Select the reason for status change from the drop-down menu. There are four reasons as listed below:
  - Open- Status used if the ticket is still open
  - Pending- Status used when waiting on the customer,
  - On Hold- Status used when waiting on a 3rd party and not the customer.
  - Resolved- Ticket is resolved

The screenshot displays the 'Ticket #54' interface. At the top, it shows 'Priority: NORMAL', 'Priority Score: 20', and 'Status: OPEN'. Below this is the 'Attributes' section, which includes fields for 'Team' (All Users), 'Assigned To' (Jayanthi Kumar), 'Priority' (Normal), and 'Status' (Open). The 'Status' dropdown menu is open, showing options: Open, Pending, On Hold, and Resolved. Below the 'Attributes' section are 'Categories' (complaints, Complaint type, queries, Text) and 'Attachments'. At the bottom, there is a 'Timeline' section with a message from 'Puzzle Test Channel' dated 'Sep 20, 2020 @ 6:03am'. The message content is 'Cannot assign rules to teams via Test'. Action buttons for 'Add Task', 'Add Note', 'Forward', and 'Reply' are visible.

### Note

Options to allow the user for changing status can be configured in account settings.

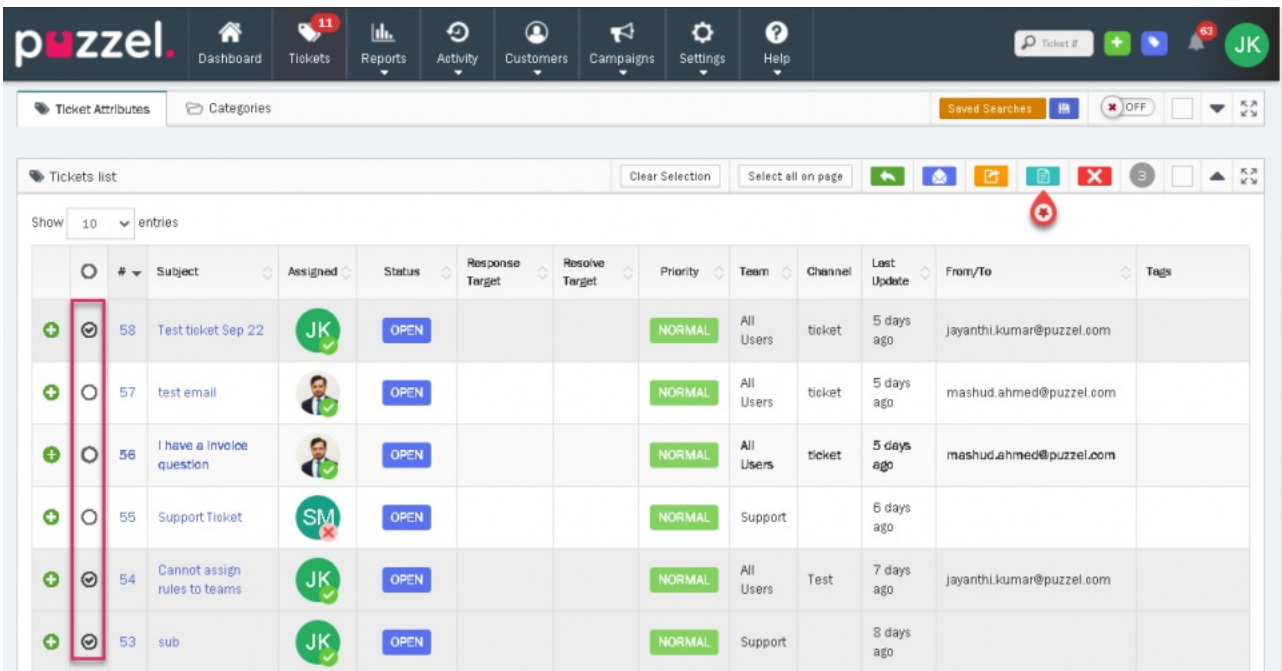
## Bulk action of tickets

Where you have the necessary permissions it is possible to perform bulk actions with up to 100 tickets at a time to:

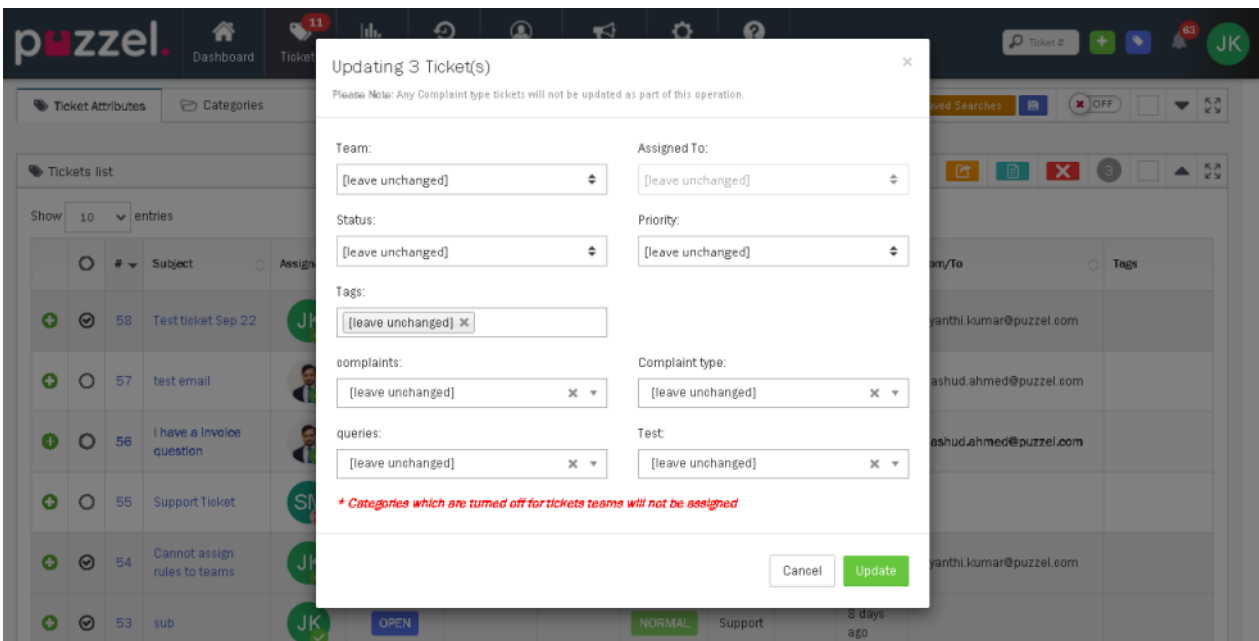
- Bulk Update
- Bulk Response
- Bulk Delete

To bulk update the tickets, you:

1. Go to ticket list, and select the tickets that you want to bulk update. Click the bulk update icon at the right side of the panel.



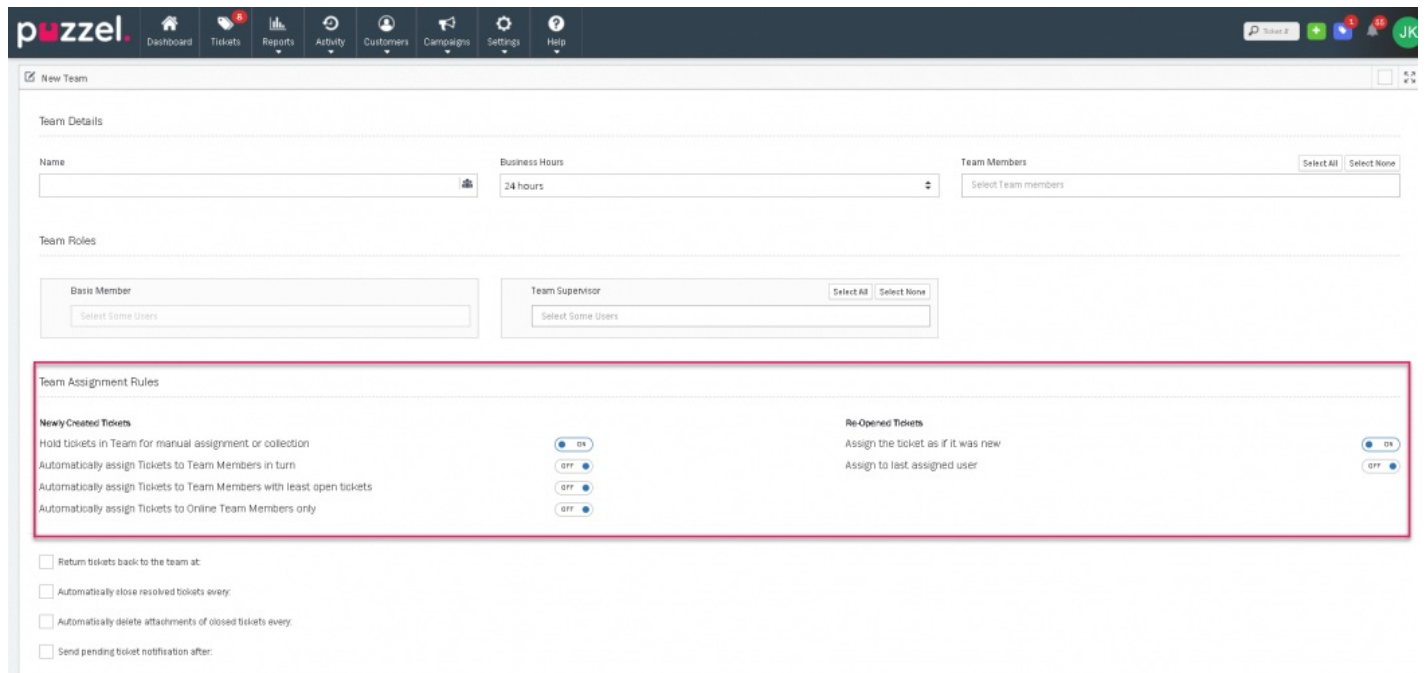
2. You can change/update common attributes such as team, assigned to, ticket status, priority and tags. You may also update categories and other important attributes if enabled.



3. Click **Update** to change the attributes.

## Automatic Team Assignment

Tickets can be automatically distributed to the Users in a Team set under Team Settings.



There are 4 assignment options for Tickets newly assigned to this Team; This includes existing Tickets reassigned from a different Team, as well as New Tickets assigned to this Team by the Ticket Rules.

Property	Description
Hold tickets in Team for manual assignment or collection	Tickets are not automatically assigned to Users but can be collected using the Collect button ensuring the most relevant ticket is automatically chosen. The Collect queue is sorted by SLA and Priority (set by Rules) to ensure that most important Tickets are dealt with first.
Automatically assign Tickets to Team Members in turn	Tickets are distributed automatically to Users in the Team in a rotary or round robin method
Automatically assign to Team Members with least Open tickets	Tickets are automatically assigned to Users in the Team with the least number of assigned Tickets in Open status
Automatically assign to Online Team Members	Tickets are automatically assigned to Users in the Team in a rotary method but only to Users online. If no Users online Tickets held for Collection or Manual assignment

Another Team option ensures that Tickets are redistributed each day.

### Return tickets back to the team at:

This option updates any Unresolved Tickets (Open, Pending & Error) to Unassigned. Once unassigned, the Team assignment option selected for that Team is applied.

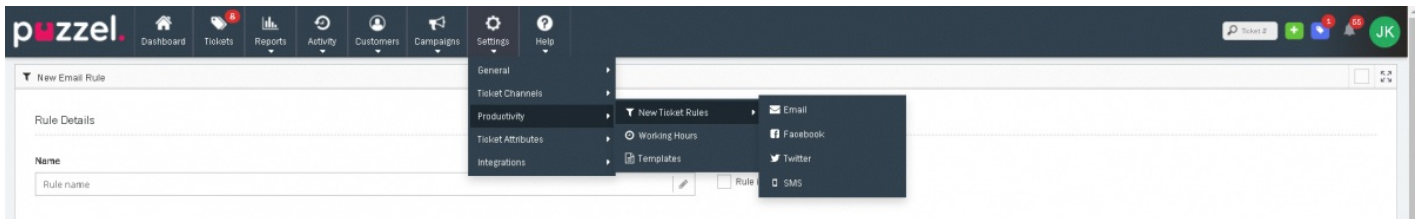
For example, at 6pm each day all Unresolved Tickets are redistributed automatically to Users in the Team, ensuring a balanced workload for the next working day.

For more details on automatic assignment of tickets please refer to this [article](#).

## Automatic Follow-Ups

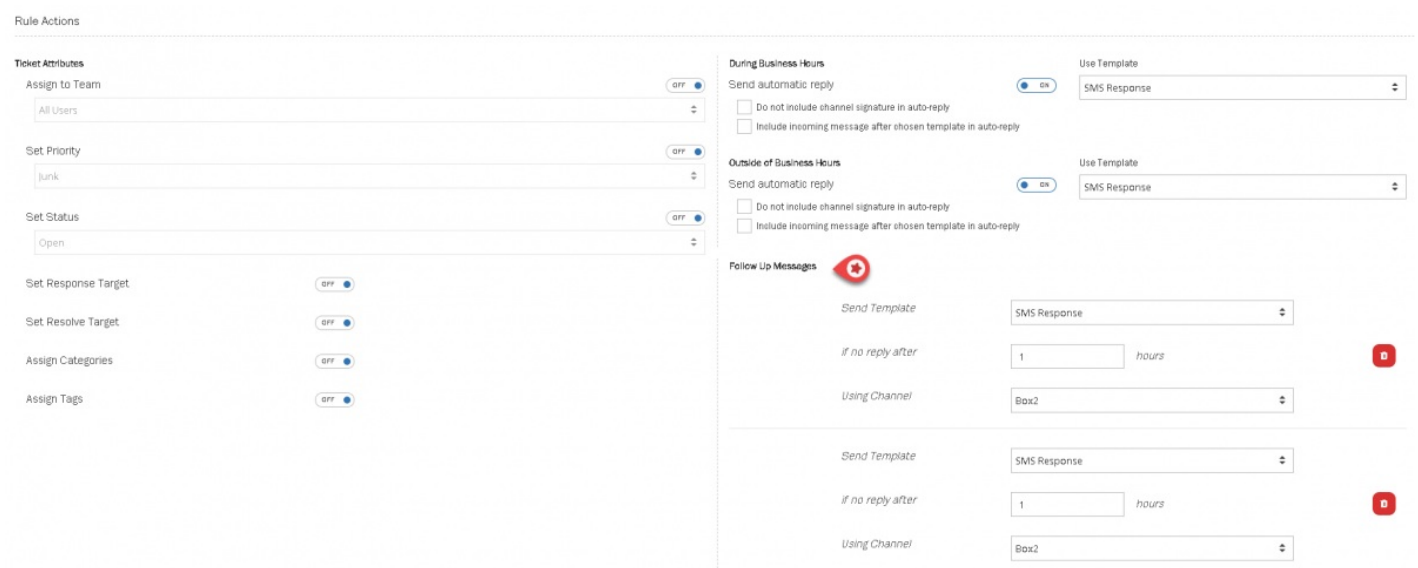
When you send a reply from Puzzel Ticketing that requires a response, Follow-ups are an amazing tool that sends an automated response to the action of the customer, so that you don't have to.

Follow-Ups are governed by the New Ticket Rules. When a Ticket is received and meets the criteria of a Rule, it will simulate a series of actions to send Follow up messages multiple times over a period from different Email & SMS channels. The follow up actions can be defined in the New Ticket Rule section under Settings->Productivity->New Ticket Rules and choose the channel you wish to set the automatic response to.

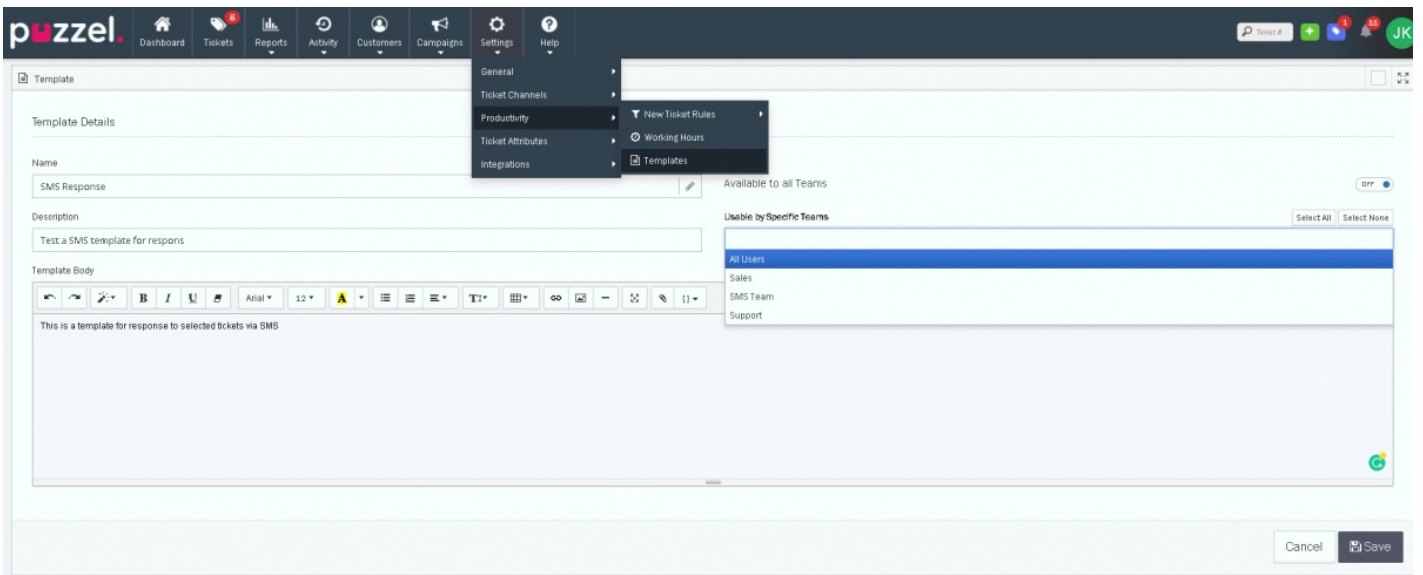


The Follow Up Messages options are available under the Rule Actions section, on the right panel. Click on the

**+ Add Follow Up** button to add a new Follow-Up message. You can have up to a maximum of 10 follow up messages. Each message can be sent from a different Channel, with a different set amount of time to wait before sending, with a different Template message.



The template for the follow up action can be created by going to Settings->Productivity->Templates



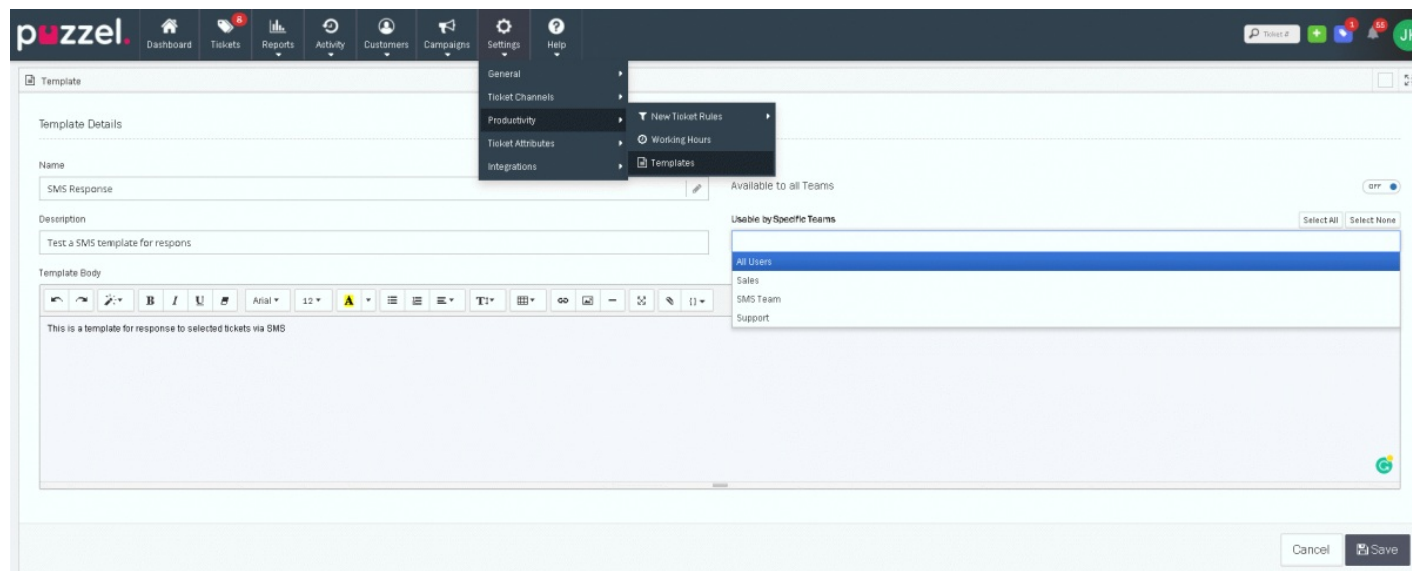
The template messages sent as Follow-ups are shown in the Ticket timeline as a **Follow Up** event.



## Creating an Automatic Reply

Using ticket rules and templates, it is possible to set up an autoreply system within Puzzel Ticketing. To create an auto response system, or a simple autoreply message, you use the same steps and methods.

First, make a new template. **Settings > Productivity > Templates**



Give your template a name and description so that you can quickly identify it. You can also assign the template to specific teams, or simply to all of them. You need to **Save** to continue to the text page. You can now key in the required message you want to auto respond in the template body box. You are allowed to include images and attachments to the response.

Auto replies are set from the New Ticket Rule section.

There is also the placeholder tool. Placeholders allow you to have specific information automatically populated into the message such as, Customer Name, Ticket Number and more. This allows you to send specific and personalised messages that are completed automatically.

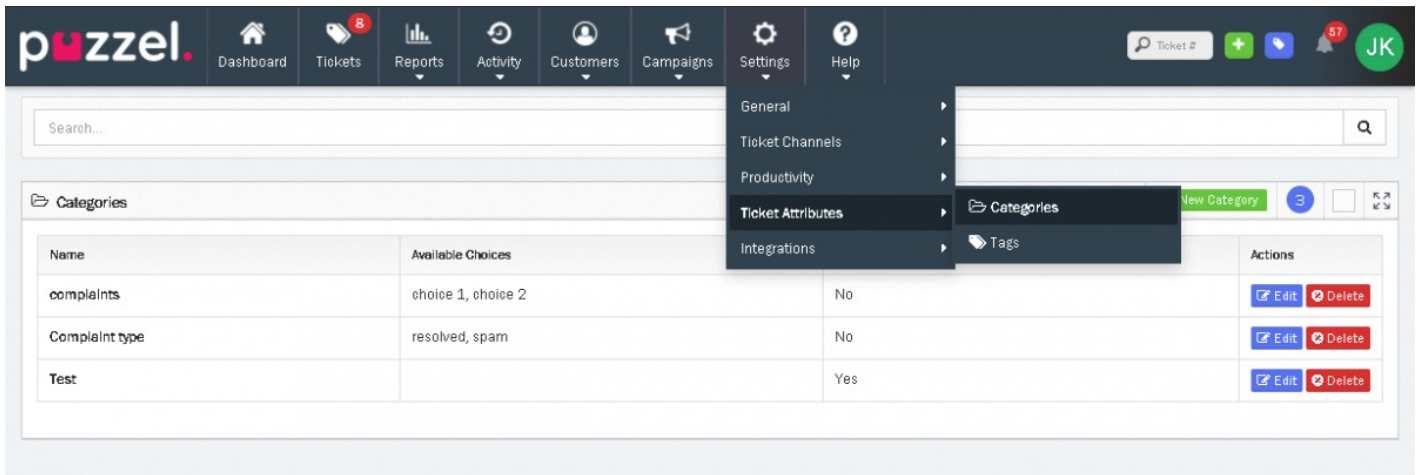
## Categories

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

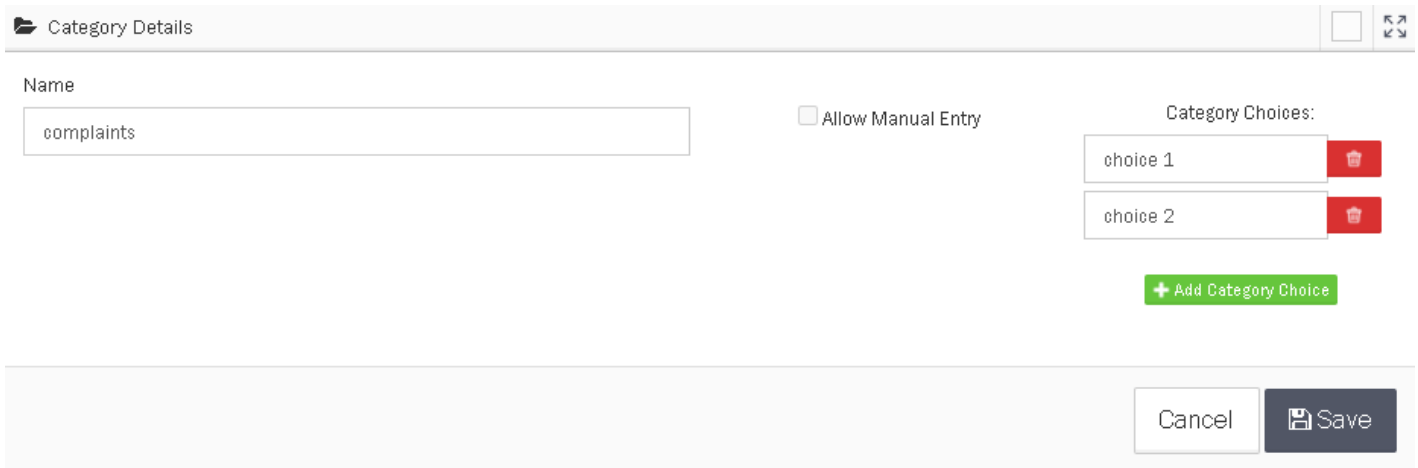
For example:-

**Query Type:** General, Sales, Support or Complaint

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



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



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' section is expanded, and the 'Categories' sub-section is highlighted with a red border. It contains four dropdown menus: 'complaints' (selected 'choice 2'), 'Complaint type' (selected '--Unassigned--'), 'queries' (selected '--Unassigned--'), and 'Test' (empty). A 'Save' button is visible at the bottom right of the Categories section.

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 (3) is active. A filter is being added for 'Users' with the 'Include' option selected. A dropdown list of users is visible on the right, including 'Agent 1', 'Alle Desreux', 'Andreas Wallin', 'Christian Thorsrud', 'Danish', 'Finnish', 'Harald Bakken', 'Jan Rygh', 'Jayanthi Kumar', and 'Jostein Jose Lund'. A 'Previous' button is visible at the bottom left.

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.

The screenshot shows the 'Ticket Attributes' panel. The 'Categories' tab is selected and highlighted with a red box. It shows search fields for 'complaints' (selected '--Any--'), 'Complaint type' (selected '--Any--'), 'queries' (selected '--Any--'), and 'Test' (empty). A 'Submit' button is visible at the bottom right.

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.

The screenshot shows the Puzzel dashboard interface. At the top, there is a navigation bar with the 'puzzel' logo and several menu items: Dashboard, Tickets (with a red notification badge), Reports, Activity, Customers, Campaigns, Settings, and Help. On the right side of the navigation bar, there is a search field for 'Ticket #', a green plus icon, a blue refresh icon, a red notification badge with '58', and a user profile icon labeled 'JK'. Below the navigation bar, the main content area is titled 'Ticket Attributes' and has a sub-tab 'Categories' which is highlighted with a red box and contains a red exclamation mark icon. To the right of the sub-tab, there are buttons for 'Saved Searches', 'OFF', and a window control icon. The main content area is titled 'Search by Ticket Attributes' and contains several filter fields: Teams, Users, Status, Priority, Time Period, Channel Type, Channel, Tags, Created, Last Activity, and Read/Unread. Each filter field has a dropdown menu with 'Any' selected. At the bottom right of the search area, there is a 'Search' field with a magnifying glass icon and a 'Search All' dropdown menu. A green 'Submit' button is located at the bottom right of the page.

## Placeholder

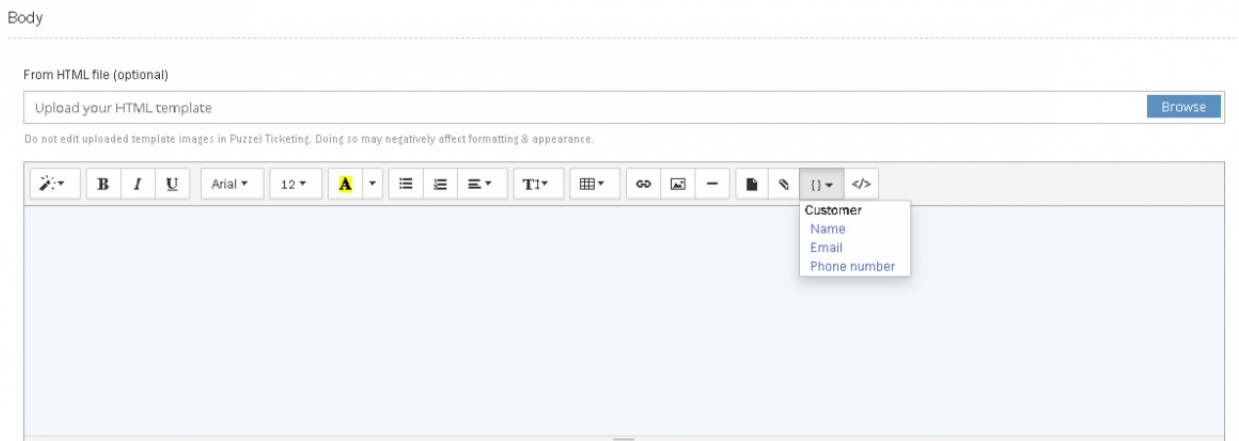
Placeholders are fields you can add to a Template or Campaign to autofill personal and other information in the response.

Some examples are:

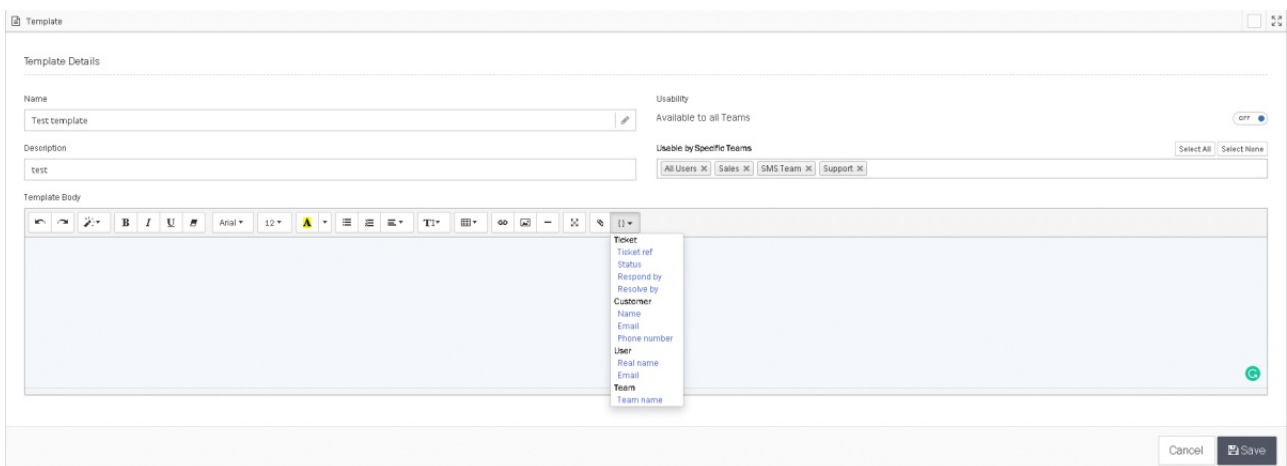
- Customer Name
- Customer Email
- Customer Phone
- Assigned User
- Assigned Team
- Any custom attributes

Placeholders can be added to Templates and Campaigns using the **Insert Placeholder** button found in the text toolbar. The Placeholder button can only be found in the toolbar for Templates and Campaigns. It is not available when replying to a Ticket directly.

### Campaign Placeholder button



### Template Placeholder button



Custom Attributes can also be used with Placeholders, even though they're not displayed in the available options under the Placeholder Button.

To use Custom Attribute Placeholders in Templates or Campaigns, you can manually type `{{customer:...}}` without the

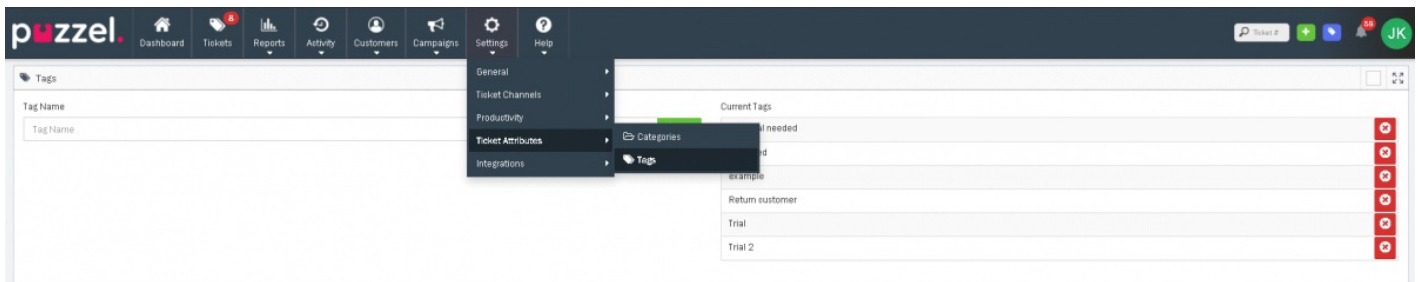
quotation marks. Enter the name of the Custom attribute in place of the "...".


For example, if you have a Custom Attribute '**Policy Number**' which has a unique value for each Customer, you can have this autofill for Template responses by typing:

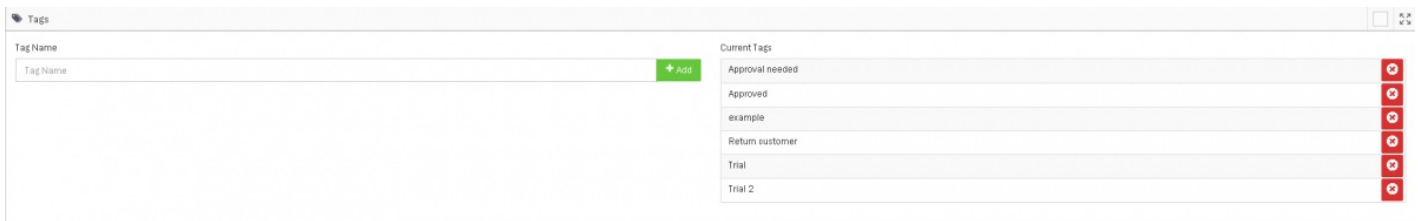
```
{{customer:policy_number}}
```

## Tags

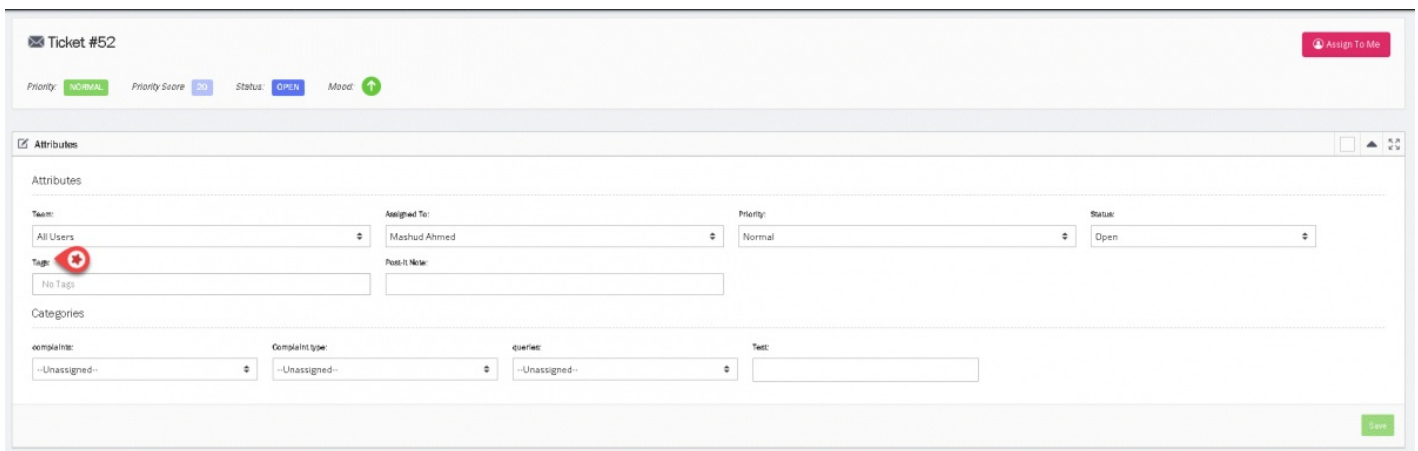
Tags are a great way to label specific Tickets & Queries. To add new Tags, go to **Settings -> Ticket Attributes -> Tags**.



Simply add a Tag name into the **"Name"** field and select the  button to add a new Tag. You can add as many Tags as needed.

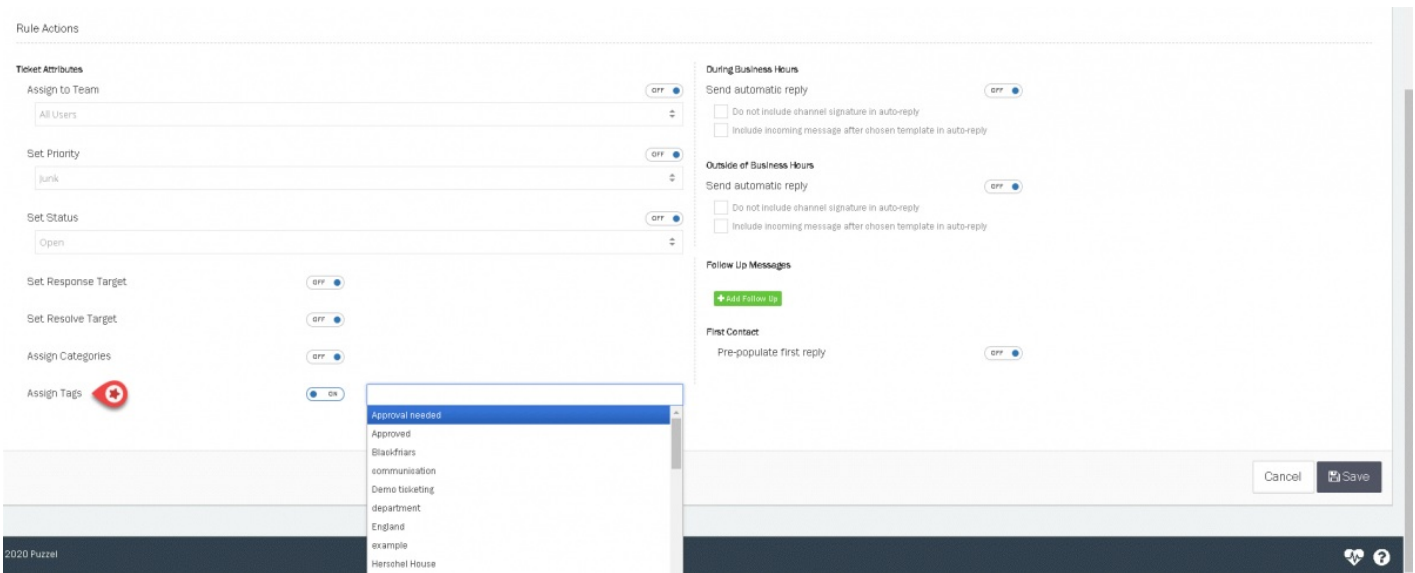


Tags are easily added to the **Ticket Attributes** for a Ticket by selecting appropriate tags from the **"Tags"** field and selecting **"Save"** to update the added Tags.

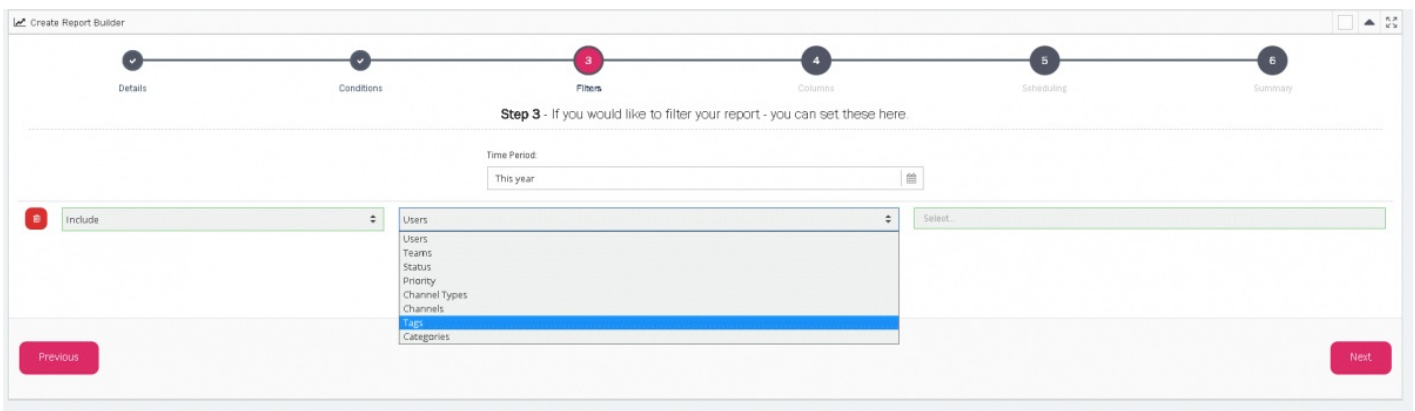


Tags can also be automatically added to Tickets using the New Ticket Rules.

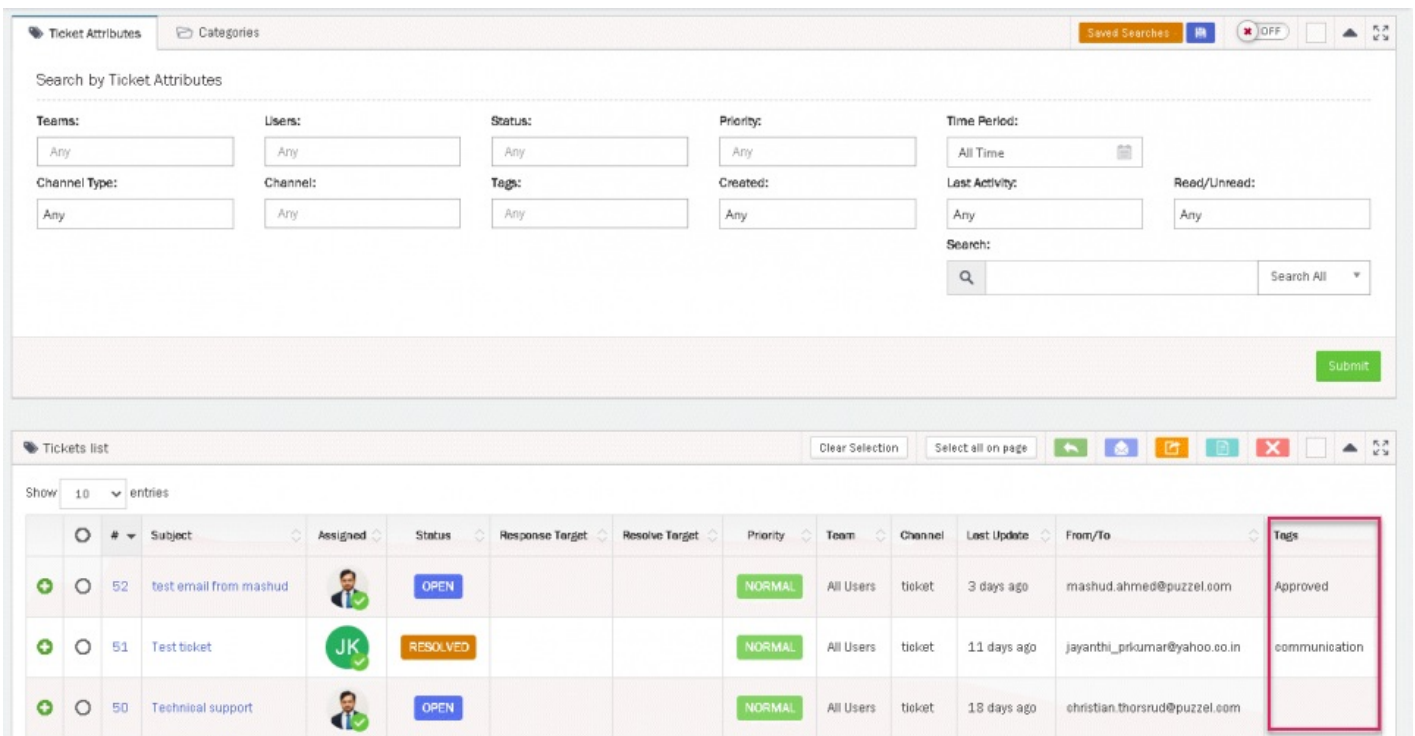




A Filter can be added to Include or Exclude specific Tags in the results.



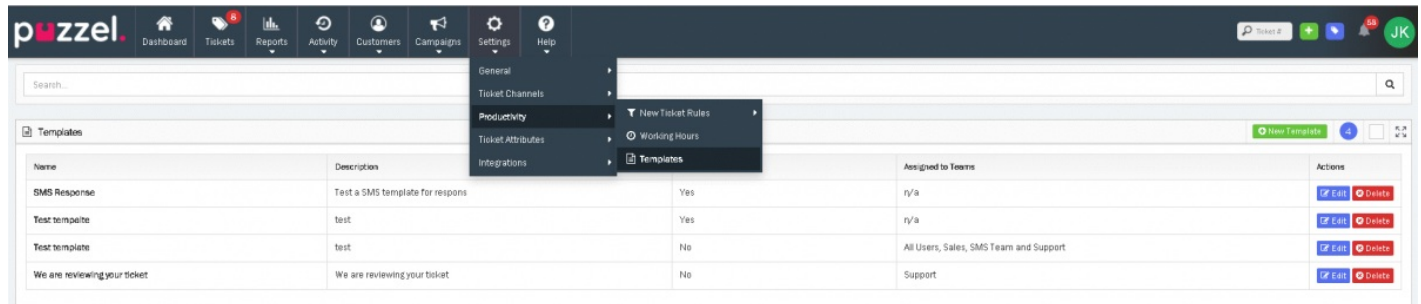
Tickets can be searched for by the applied Tags from the Tickets page.





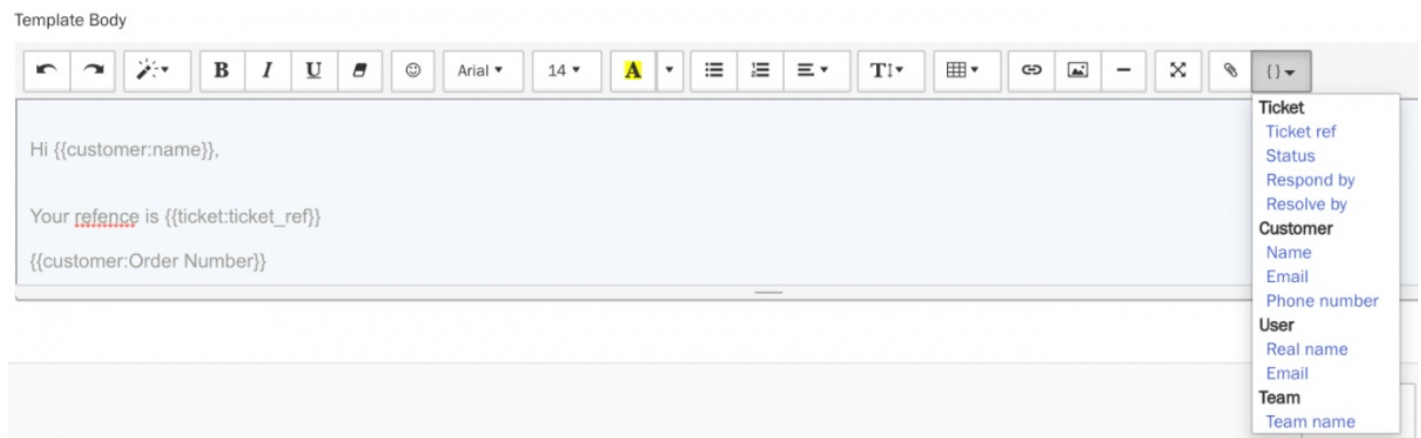
## Templates

Templates can be used to send Automated Replies, Canned messages, Automatic Follow-ups & provide scripted answers in your answers.



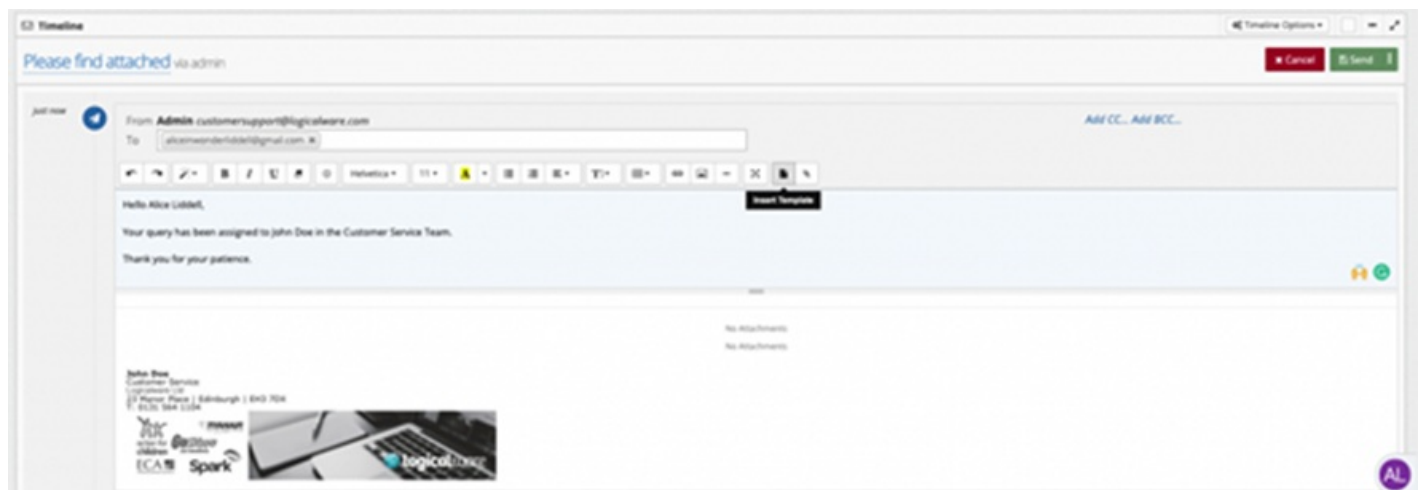
To create a new Template go to Settings -> Productivity -> Templates and click on **New Template** button. or if you want to update an existing Template, click on **Edit** against the template you wish to change.

Specify a name for the Template and determine which teams can use the Template. This will be useful for any Team or query specific responses that shouldn't be made available for some Users.

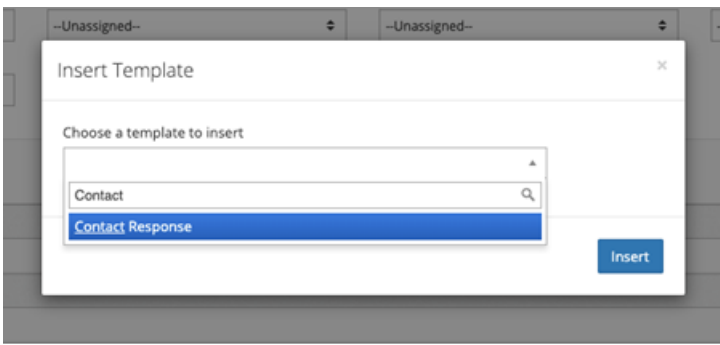


Type out the Template message in the text editor. You can select the Placeholders button to select from available fields that can autofill when the template is sent. For example, have the Customer's name automatically populate by using the **{{customer:name}}** placeholder.

You can also attach files such as PDFs, images Spreadsheets and other documents to templates. These attachments are automatically attached to your Ticket response when this Template is used in your reply.



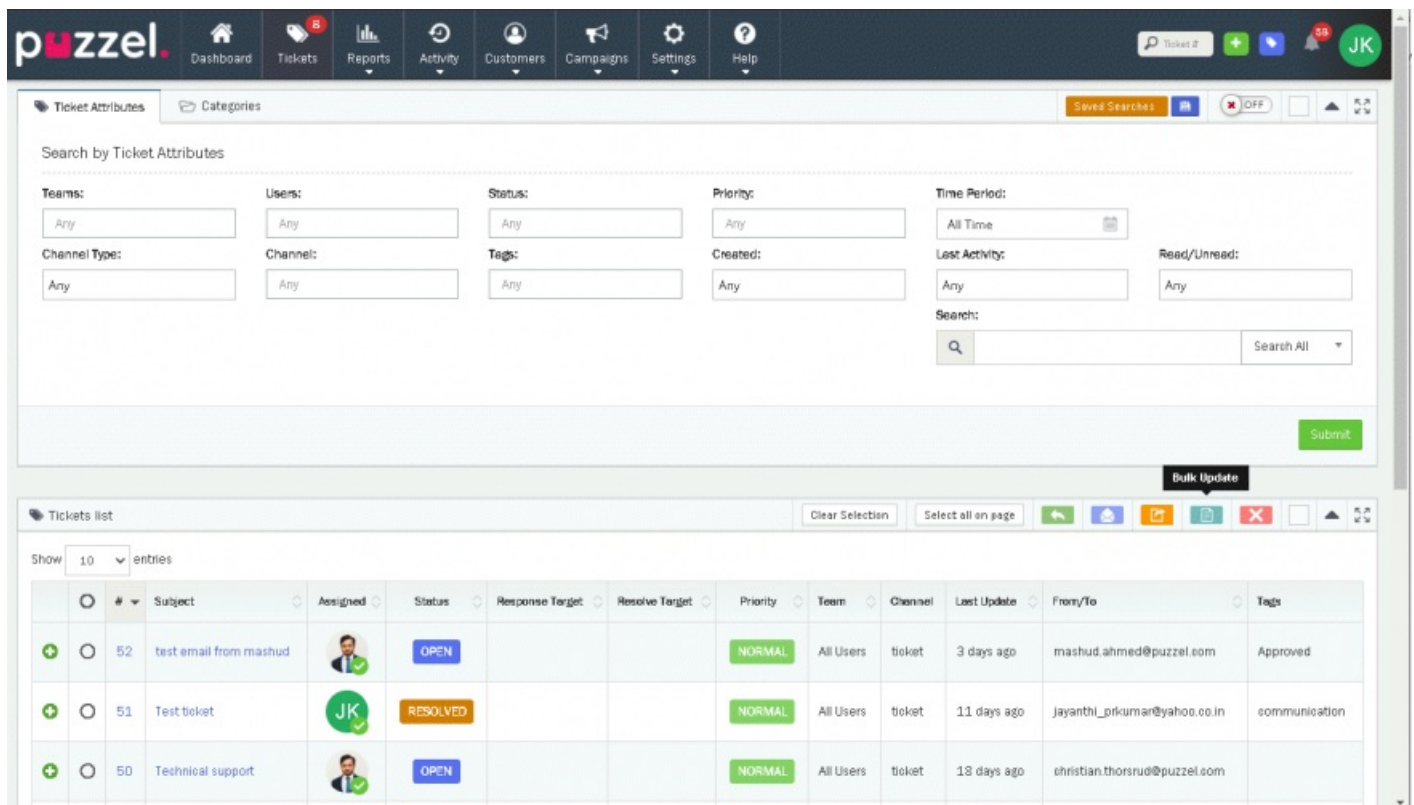
One or more Templates can be added to your response when replying to a Ticket by select the **Insert Template** option found in the text toolbar.



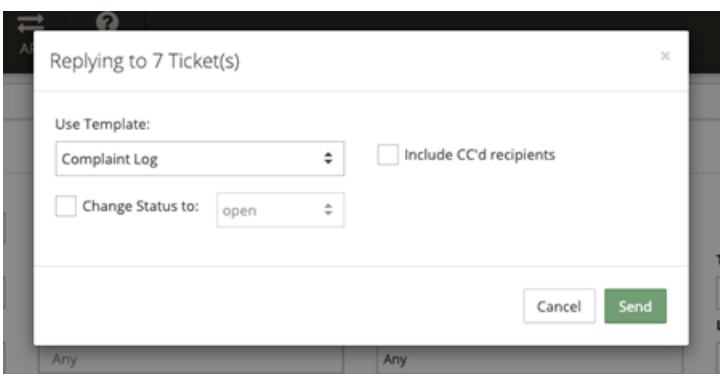
Templates can be searched for by their name. If you use a lot of template responses, we recommend using a naming scheme to make it easier to use the Template search option.

Other uses for Templates include the automatic replies, follow-up messages & pre-populate responses as used by the *New Ticket Rules*. These are found under the actions section when creating or editing a New Ticket Rule.

Templates can also be used for the Bulk Response tool from the Tickets List.



If you have access to the Bulk Update tool, you can select one or more Unresolved Tickets and then select the Bulk Response option.



Select the Template reply you want to send, if CC'd recipients should be included and even update the status of the selected Tickets once the response is sent. This is especially useful if lots of customers all get in touch regarding the same topic and require the same response.

## Campaigns

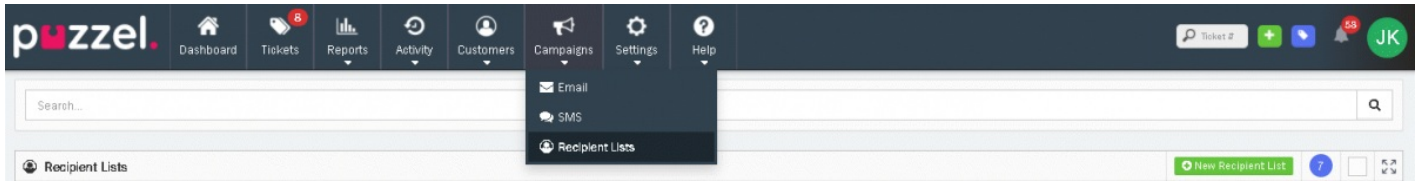
A campaign is an act of sending messages to a set of individuals via email or SMS with a specific purpose over a period of time or as a one off promotion.

- [Creating Recipients List](#)
- [Email Campaigns](#)
- [SMS Campaigns](#)

## Campaigns - Recipients List

The Recipient List is the list of contacts a campaign is sent to. You should create at least one Recipient list before creating any Campaigns.

To create a recipient list Select **Recipient Lists** under the **Campaigns** tab from the main menu bar.



**Note**

The Campaigns tab will only be available if your User has access to Campaigns under your System Role.

The main Recipients List page will show the list of existing Recipients List, including the number of contacts selected under each list and if any lists are already being used by a Campaign.

The screenshot shows the 'Recipient Lists' page with a table of existing lists. The table has columns for Name, Description, Campaigns, Recipients Count, and Actions.

Name	Description	Campaigns	Recipients Count	Actions
Herald File Import test 1		2020-05-05 Herald Test 1	1	[Edit] [Delete]
Herald File Import Test 2	Test of file import		1	[Edit] [Delete]
Herald Test	This list only contains Herald	2020-09-03 Test 1, 2020-06-15 Herald Test, 2020-04-30 Herald Test 1	1	[Edit] [Delete]
Herald Test from contacts	Test to setup at distribution list from contacts		0	[Edit] [Delete]
Jll test		jostein test, 2020-05-06 Herald TEST 1	2	[Edit] [Delete]
Test Import	This is a test	Test Campaign SMS	1	[Edit] [Delete]
trial list	Jays list	New SMS campagn, Trial campagn, New feature announcement, Upcoming release, New feature announcement 2020-09-19 07:55:14, New feature announcement duplicate	3	[Edit] [Delete]

Click on **New Recipient List** button to create a new list.

The screenshot shows the 'Details' form for creating a new Recipient List. It includes fields for Name and Description, and buttons for Cancel and Save.

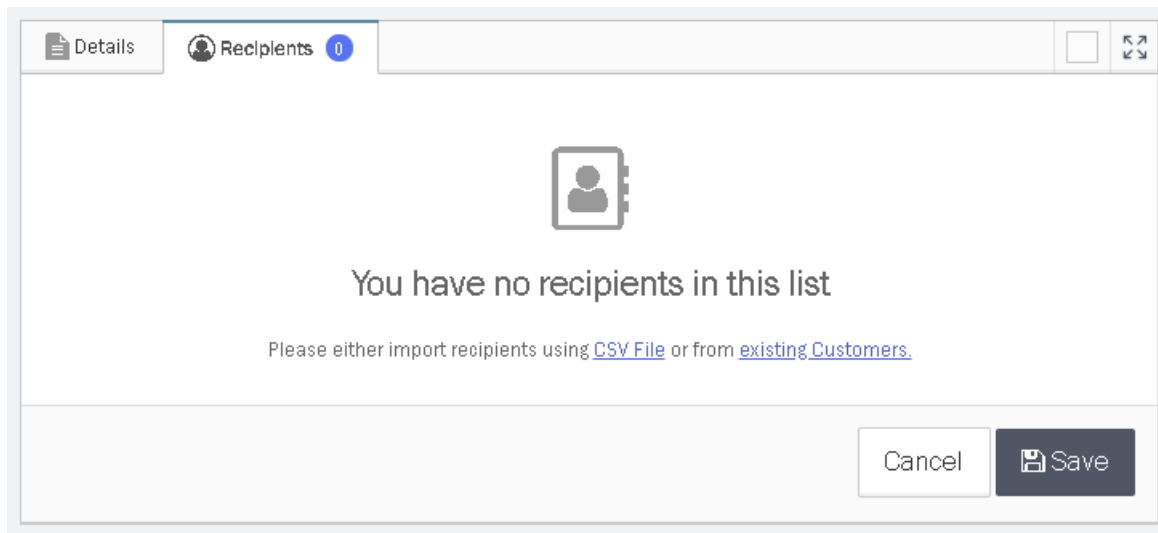
**Details**

Name:

Description:

Enter a Name and Description for the list and click **Save**.

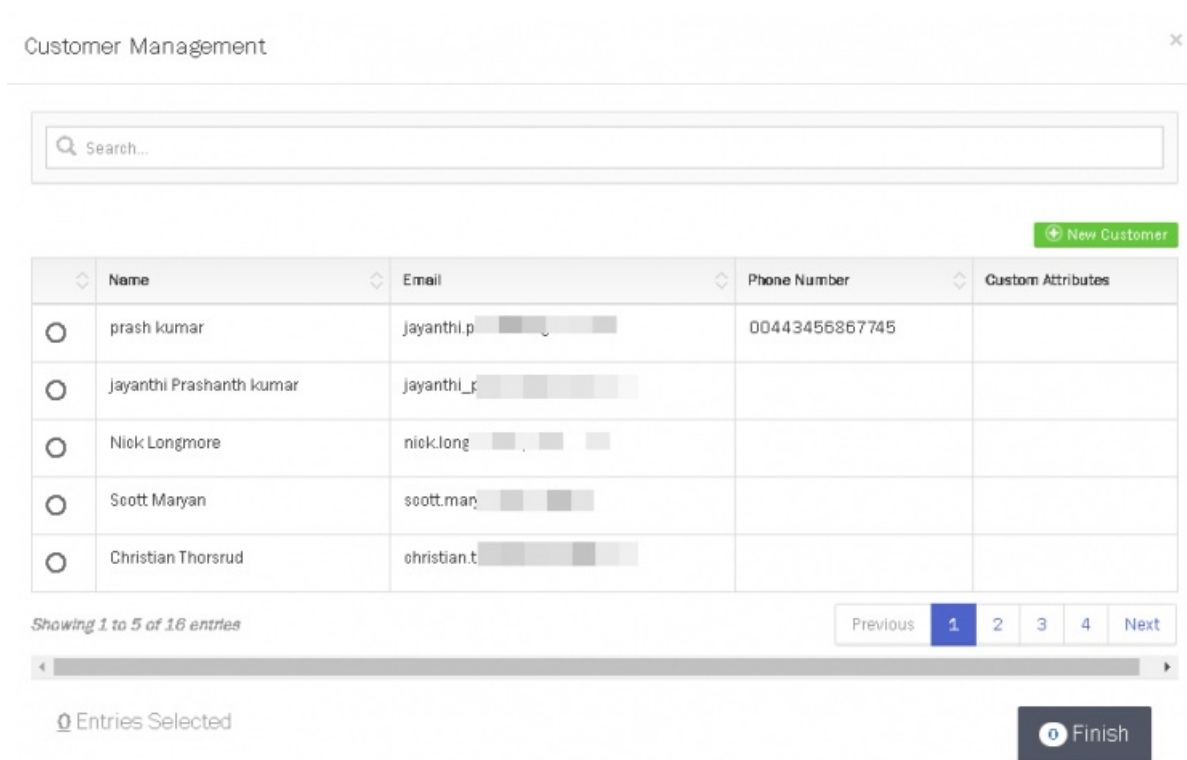
Now select the **Recipients** tab to add contacts to this list.



Contacts can be uploaded using a CSV file. The Customer Attributes template can be used for this purpose.

[import\\_user\\_template.csv](#)

Alternatively, you can add from the existing Customers list as shown on the Customers Management screen.



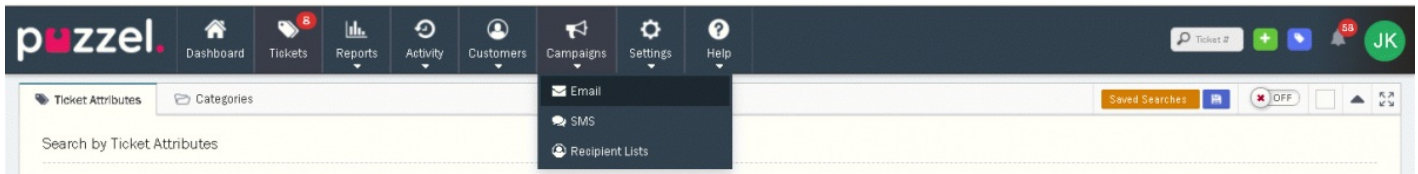
When adding recipients from the existing Customers list, you can search for specific Customers by their information such as:

- Name
- Email
- Phone Number
- Any Custom Attributes

Select **Finish** and then **Save** to complete creating the new Recipient List.

## Email Campaigns

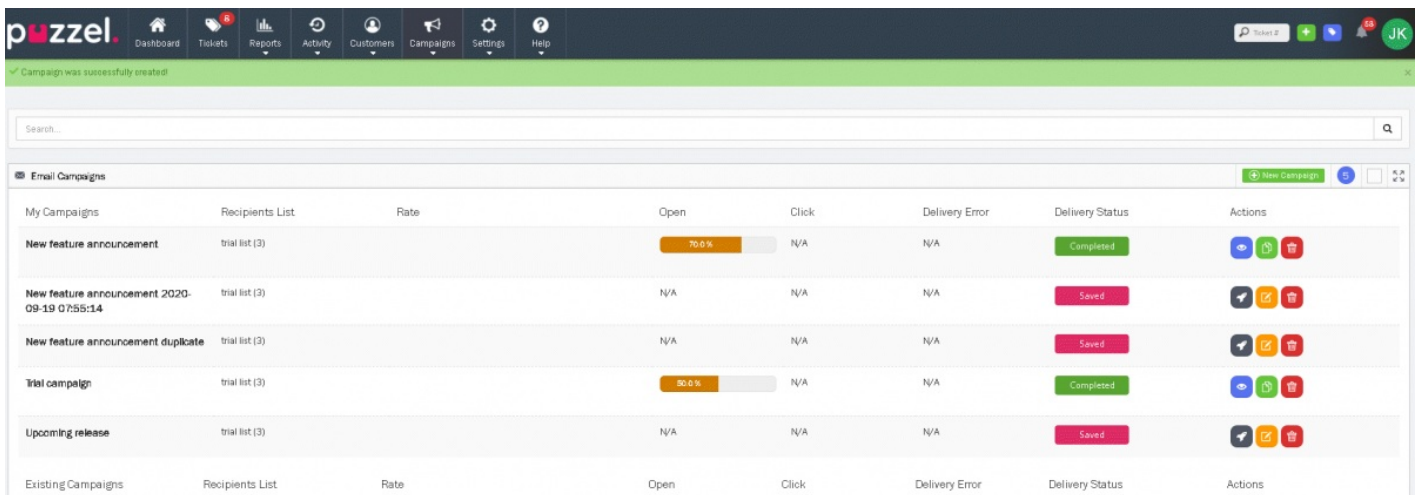
Send bulk or mass outbound e-mails to a list of recipients list. To create, view, edit an Email Campaign select the **Email** option under the **Campaigns** tab from the menu bar.



### Note

You will only see the Campaigns tab if your User has access permissions under your System Role.

The Campaigns page will show the list of Campaigns you have access to. These are split into Campaigns you have created and Campaigns created by other Users that you can view and edit.





## Creating or editing a campaign

To create a new campaign click on the  icon or on  icon to edit the saved campaigns.

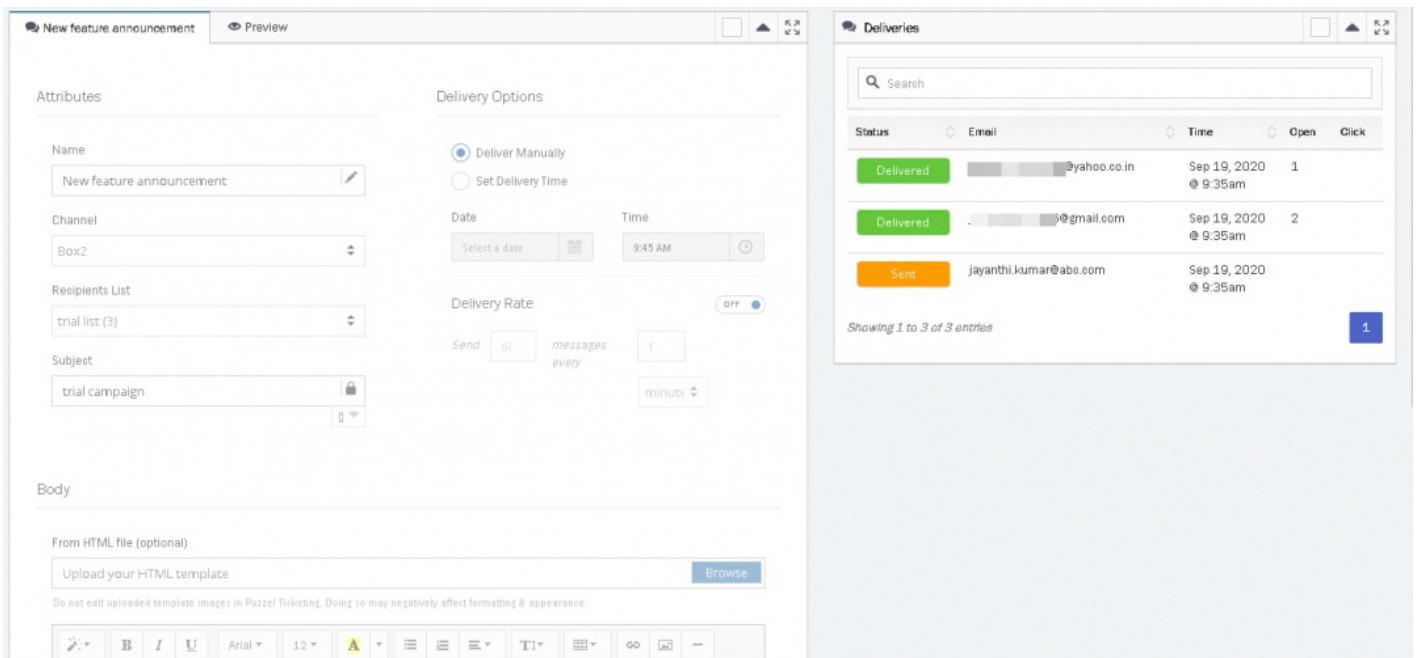
### Note

Note that you cannot edit the launched campaigns. However, you are allowed to duplicate it if required and relaunch it with same or different criteria.

- Enter the name of the campaign and select the Email Channel you wish to send the mails from.
- Select Recipients list from the drop down, this Campaign should be sent to. Read [Recipients list](#) for more information how to add recipients to the list.
- Enter the subject line for the campaign. Placeholders can be used with the Subject line to include Customer-specific information such as their Name.
- Set the delivery options to either manual delivery or to be sent at a set date and time.
- Set the rate at which the campaign messages should be delivered. By default, this is set to 1,800 per minute. You may want to reduce this to have a better control over the rate of responses you receive.
- Enter the campaign content. This can be done in two ways.
  - Upload via HTML template by selecting the file using the **Browse** button
  - Enter the content directly in the text editor. Select the **Code View** option in the text toolbar to edit the content using HTML code.
- Save and Preview the campaign to see how it looks for each recipient by pressing the **Preview** tab at the top. Any Placeholders will load for the select Recipient from the drop-down.
- Launch the campaign by clicking on the  icon against the campaign in the list.



After the Campaign has been launched, a delivery report is made available which shows whether the campaign was Delivered, Bounced or Failed for each recipient as well as the number of Read and Click receipts. To see the delivery status click on the  icon against the completed campaign.





**Note**

The search bar at the top of the Deliveries panel allows you to search for a specific recipient.

You can also duplicate an existing campaign by clicking on the  if you wish to relaunch it with similar criteria or change it according to your requirement. To delete a campaign click on the  icon against the campaign name.

**Email size limit**

**Inbound: 35MB**

Puzzel Ticketing has an Inbound Email limit of 35MB. This means any Email over 35MB will not be received into Puzzel Ticketing. The size of the Email includes the message and the attachments with it.

**Outbound: Unlimited**

There is no Outbound limit in Puzzel Ticketing. You can send an Email of any Size from Puzzel Ticketing. However, we cannot guarantee Emails of significant size will be received at the recipient end as most Email providers have an Inbound Email limit similar to Puzzel Ticketing.

These limits typically range from 20MB – 35MB, so we recommend ensuring your Emails and any Attachments are kept below 30MB.

**Ensuring proper delivery of Emails**

When using your own email address for an Email Ticket Channel, we send out all email responses as if they were from your company email address. Whilst we have taken every step we can to ensure successful delivery of your email, it is possible that your customer’s email server (Gmail, Yahoo, etc.) might mark the replies you send through Puzzel Ticketing as spam. The reason for this is that we are sending emails on your behalf and you have not yet authorised us to do so.

To ensure that your emails get delivered correctly you should create an SPF record on your DNS Zone file – your IT department or web hosting company will be able to complete this task for you.

**Adding our SPF record to your DNS:**

- Log in to the control panel for your domain or mail server
- Open your DNS configuration settings and edit your zone file
- If you have no current SPF record:



- Add the following as a .TXT record: v=spf1 include:spf.logicalware.com ~all
- If you already have an SPF record:
  - Include our SPF value at the beginning of your current record v=spf1 include:spf.logicalware.com include:spf.domain1.com include:spf.domain3.com ~all
- Save your changes

If you set up Ticket Channels for more than one domain, e.g. email@**abc**.com and email@**xyz**.com, you will need to add our SPF record for each domain.

#### Note

We cannot provide specific instructions for each email server, but some specific instructions for some are here:

- [GoDaddy](#)
- [Namecheap](#)

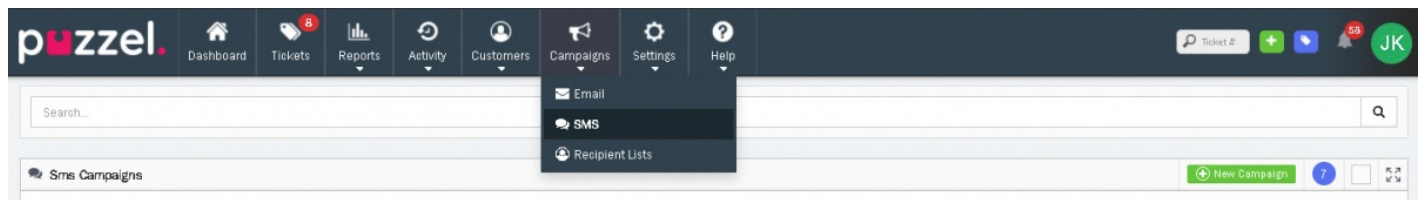
#### **If you're using an Anti-Virus or Anti-Spoofing tool:**

If you use email protection tools, such as Mimecast, be sure to include a Bypass Policy for Puzzel domain.

Third-party protection tools can interfere with our SPF record in your DNS domain and will require an additional Virus or Spoofing Bypass policy to allow our domain, and ensure Puzzel Ticketing can still send your emails without error.

## SMS Campaigns

Send bulk or mass outbound SMS messages to a list of recipients list. To create, view, or edit an SMS Campaign, select the **SMS** option under the Campaigns tab on the main menu bar.



**Note**

You will only see the Campaigns tab if your User has access permissions under your System Role.


The main SMS Campaigns page will show the list of existing and available SMS campaigns. These are separated by your Campaigns and Campaigns created by other Users.


My Campaigns	Recipients List	Rate	Sent	Delivered	Sending Error	Delivery Error	Delivery Status	Actions
<b>New SMS campaign</b>	trial list (3)		N/A	N/A	N/A	N/A	Saved	[Edit] [Duplicate] [Delete]
Existing Campaigns	Recipients List	Rate	Sent	Delivered	Sending Error	Delivery Error	Delivery Status	Actions
2020-04-30 Harald Test 1	Harald Test (1)		N/A	N/A	N/A	N/A	Completed	[View] [Duplicate] [Delete]
2020-05-05 Harald Test 1	Harald File Import test 1 (1)		N/A	100.0 %	N/A	N/A	Completed	[View] [Duplicate] [Delete]
2020-05-06 Harald Test 1	jil test (2)		N/A	100.0 %	N/A	N/A	Completed	[View] [Duplicate] [Delete]
2020-06-15 Harald Test	Harald Test (1)		N/A	N/A	100.0 %	N/A	Completed	[View] [Duplicate] [Delete]
2020-09-03 Test 1	Harald Test (1)		N/A	N/A	100.0 %	N/A	Completed	[View] [Duplicate] [Delete]
Jostein test	jil test (2)		N/A	100.0 %	N/A	N/A	Completed	[View] [Duplicate] [Delete]
Test Campaign SMS	Test Import (1)		50.0 %	50.0 %	N/A	N/A	Completed	[View] [Duplicate] [Delete]

To create a new SMS campaign click on the icon or on icon to edit the saved campaigns.

**Note**

Note that you cannot edit the launched campaigns. However, you are allowed to duplicate it if required and relaunch it with same or different criteria.

- Enter the name of the campaign and select the SMS Channel you wish to send the messages from.
- Select Recipients list from the drop down, this Campaign should be sent to. Read [Recipients list](#) for more information how to add recipients to the list.
- Enter the subject line for the campaign. Placeholders can be used with the Subject line to include Customer-specific information such as their Name.
- Set the delivery options to either manual delivery or to be sent at a set date and time.
- Set the rate at which the campaign messages should be delivered. By default, this is set to 1,800 per minute. You may want to reduce this to have a better control over the rate of responses you receive.
- Compose the SMS campaign message in the text editor. Placeholders can be used to automatically populate any Contact specific details such as their name.
- Save and Preview the campaign to see how it looks for each recipient by pressing the **Preview** tab at the top. Any Placeholders will load for the select Recipient from the drop-down.
- Launch the campaign by clicking on the  icon against the campaign in the list.

After the Campaign has been launched, a delivery report is made available which shows whether the message was Delivered or Failed for each recipient. To see the delivery status click on the  icon against the completed campaign.

## Reporting

This section talks about how to create report and export them.

- [CSV Ticket Export](#)
- [Report Builder](#)
- [Report Builder Columns](#)

## CSV Ticket Export

Users with access to the Bulk Update tool can select a bunch of Tickets on the Tickets page to export. The export is received as an attachment to the User's email address.

To export a specific range of tickets, go to the Tickets page, use the Ticket Attributes widget to filter the Tickets List for only those Tickets you wish to export.

For example, for a CSV export of Customer Service Tickets from Last Week, start a Search Filter for **Team: Customer Service** & **Time Period: Last Week**.

Select the **Categories** tab to search for Tickets with specific Category choices applied. For example, "Query Type: Complaints" to export call Complaint tickets. This search filter is applied alongside the Ticket Attributes search filter.

This Search filter can then be saved for future use. Simply click the *blue save icon* next to the **Saved Searches** drop-down to save the search filter currently applied.

Show	#	Subject	Assigned	Status	Response Target	Resolve Target	Priority	Team	Channel	Last Update	From/To	Tags
+	29	Fresh Ticket	JK	RESOLVED			NORMAL	Sales	ticket	6 months ago	jayanthi.kumar@puzzel.com	
+	26	ticket 24mar	JK	OPEN			NORMAL	All Users	ticket	6 months ago	jayanthi.kumar@puzzel.com	

Showing 1 to 2 of 2 entries (filtered from 52 total entries)

You can bulk select all Tickets on the page by selecting the Checkbox column header to the left of the Ticket number Or select specific tickets to export by selecting each Ticket in turn. You can select Tickets across multiple pages if required.

Once all Tickets you want to export are selected, select the **Export to CSV** option from the bulk update tools. You can only export Tickets you have selected.

You will then be given the option of which columns you want to include in your CSV export. These columns include all of the available columns for the Tickets List, including columns not currently shown on the Tickets List.

All Categories are also available to select as Columns for the CSV export. You can select as many or as few columns as required.

Click on **Export** to create and receive your CSV Ticket Export.

You will then receive an email with a CSV attachment to your User email address. This can take a few minutes to arrive depending on the number of Tickets you have selected to export.

## Report Builder Columns

Below are the details & definitions of each available column in the Report Builder.

### Ticket Counts

- **New Tickets** – The number of new Tickets created during the selected time period
- **New Manual Tickets** – The number of new Tickets created manually during the selected time period
- **New Inbound Tickets** – The number of new Tickets created from received messages during time period
  - **Changed To** – Number of Tickets assigned to User/Team/Status etc.
  - **Changed From** – Number of Tickets re-assigned from User/Team/Status etc. This excludes the ticket assignment.
- **Tickets Resolved** – The Number of Ticket Resolves during the selected time period, not the number of individual Tickets that have been Resolved.
- **Tickets Resolved Without Response** – The Number of Tickets Resolved during the selected time period without sending an Outbound response. This includes Tickets that have been Resolved, re-opened and then Resolved again without Reply.
- **Tickets Closed** – The Number of Tickets Closed during the selected time period.
- **Tickets at Start of Period** – The total number of tickets already assigned at the start of the selected time period.
- **Reopens** – The number of Resolved Tickets that have been re-Opened during the selected time period.
- **Tickets at End of Period** – The total number of tickets assigned at the end of the selected time period.
- **Choice Added** – (When reporting on Categories only) Number of Category choices added during the selected time period.
- **Choice Removed** – (When reporting on Categories only) Number of Category choices removed during the selected time period.

### Ticket Activities

- **Messages Received** – Total number of inbound messages received during the selected time period.
- **All Outbound Activity** – Total number of messages sent from Puzzel Ticketing during the selected time period including Replies & Forwards.
- **Replies Sent** – The number of messages sent in response to a ticket during the selected time period.
- **Forwards Sent** – The number of Forwards sent from Puzzel Ticketing during the selected time period.
- **Added** – The number of internal Notes added in a Ticket Timeline during the selected time period.

### Response Stats

- **Avg. Response Time** – The average time taken to respond to a received message during the selected time period.
- **Max. Response Time** – The single longest time taken to respond to an received message during the selected time period.
- **Response SLA %** – The percentage of responses that have been sent within the set Response target.
- **Avg. First Response Time** – The average time taken to respond to the first message received for a ticket.
- **Max. First Response Time** – The longest time taken to respond to the first message received for a single ticket.

- **First Response SLA %** – The percentage of first responses that have been sent within the set Response target.

## **Resolve Stats**

- **FCR %** – The percentage of tickets that were Resolved on sending the first response.
- **Avg. Resolve Time** – The average time taken to Resolve tickets during the selected time period.
- **Max. Resolve Time** – The single longest time taken to Resolve tickets during the selected time period.
- **Resolve SLA %** – The percentage of tickets that have been Resolved within the set Resolve target.



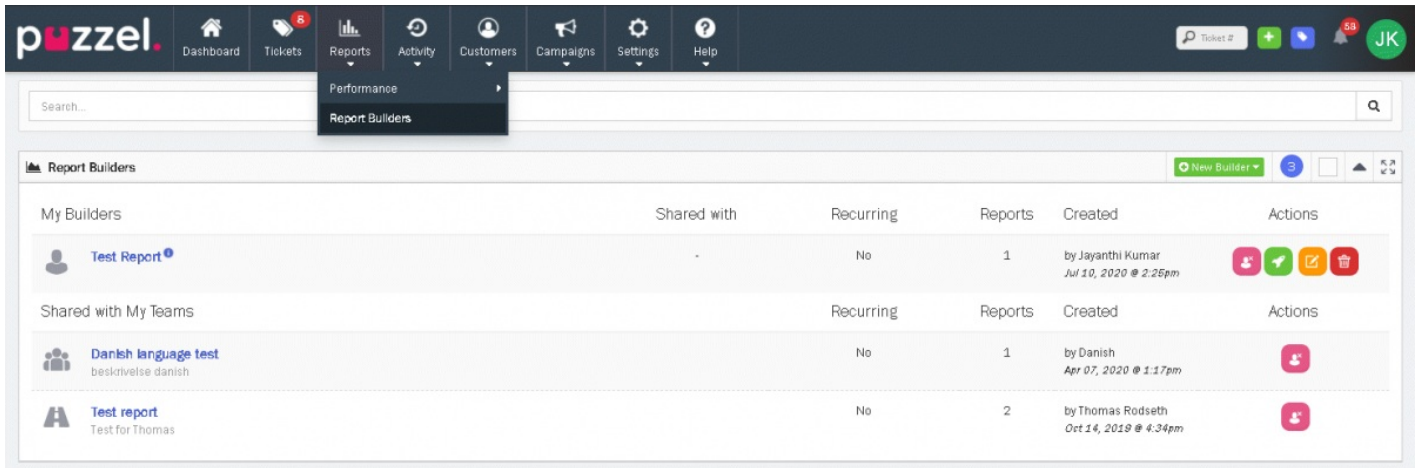
## Report Builder

The Report Builder in Puzzel Ticketing is designed to allow you to create and generate your own custom reports as standard. You can even set these reports to generate automatically at a frequency of your choice and email the results directly to you.

Report Builders can be found under the Reports tab in action bar for Users with access to Reports:


### Reports > Report Builders

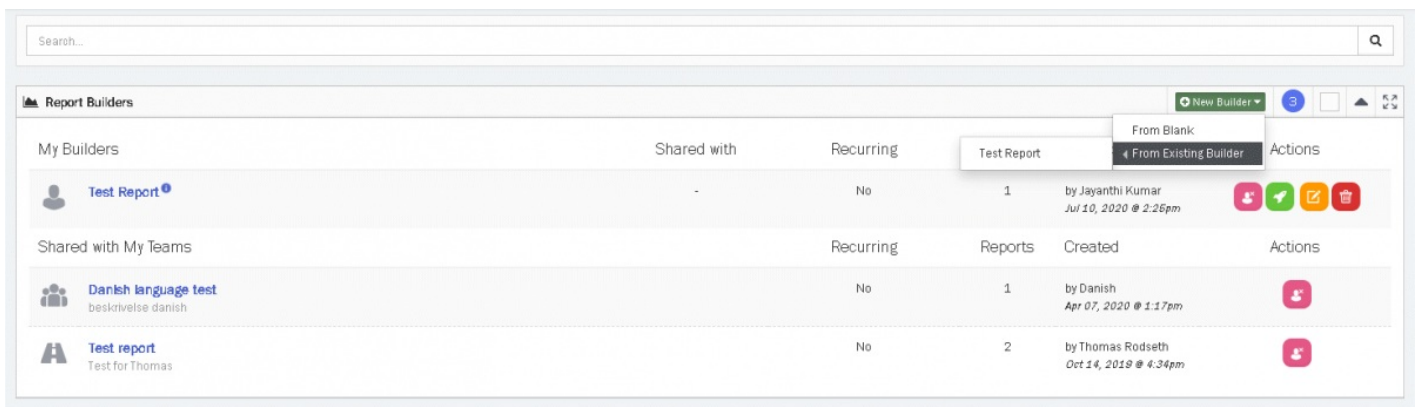
Your list of available Report Builders will be shown. This is divided into Report Builders you own, and Report Builders owned by another User that has been shared with you.



## Create a new Report Builder

Creating a Report Builder is broken down into 6 quick and easy steps.

To create a new Report Builder, click on the  button



If you already have at least one Report Builder, you will have the option to create a new Report Builder **From Existing Builder**, otherwise you can create the report builder from scratch.

### Note

Creating a new Report Builder from an existing Report Builder will open the Report Builder creator pre-loaded with the options for the existing Report Builder. You can make adjustments to these options before saving this new Report Builder.

## Step 1

### Specify Name and Description of your Report Builder

The name of the Report Builder must be unique and descriptive enough for you to know what type of Reports the Report Builder will generate. Use the description field to provide further information for the Report Builder (optional). You also have an option for sharing it with everyone or with a certain group. If you wish to keep it private share the Share generated reports to **NO**. Click **Next** to go to the next step.

Create Report Builder

1 Details 2 Conditions 3 Filters 4 Columns 5 Scheduling 6 Summary

**Step 1** - Give your builder a title and describe its main purpose.

Weekly Report

This is a weekly employee report

Sharing  
Share generated reports  YES

Share With:

- Teams
- All Users
- Sales
- SMS Team
- Support
- Users
- Agent 1
- Alle Desveaux
- Andreas Wallin
- Christian Thorsrud

Previous Next

## Step 2

### Select the conditions for your Report Builder

In this step you can select what data you want to report on. Simply select the Ticket Attribute type from the **Report On** drop-down menu. You can choose to further break down this selection by selecting a different Ticket Attribute type from the **Breakdown by** drop-down menu.

E.g. If you select to report on Teams and Breakdown by Users, your report will Report on the individual Teams in your Puzzel Ticketing account as well as the User's performance within these Teams. Click **Next** to proceed.

Create Report Builder

1 Details 2 Conditions 3 Filters 4 Columns 5 Scheduling 6 Summary

**Step 2** - Select the main element to be reported on and a breakdown. For example: *Report on: Teams, Breakdown by: Users.*

Report on  
Team

Breakdown by  
User

Previous Next

## Step 3

### Select the Time Period for your Report

You can select a specific time range of your choice, or choose from a pre-defined Time Period, such as **This Week** or **Last Month** etc. – These pre-defined Time Periods are relative to when a new report will be generated, even if you set your Report Builder to automatically recur.

E.g. If you set your Report Builder to recur every month and selected the Time Period **Last Month**, the data from the previous month at the date of generation will be used each month.

Create Report Builder

Details Conditions **Filters** Columns Scheduling Summary

**Step 3** - If you would like to filter your report - you can set these here.

Time Period:  
Last week

Exclude Users Danish x Finnish x

Include Status Closed x

+ Add a filter

Previous Next

You can also set custom filters to Include or Exclude specific Ticket information from your Reports. Simply click the **Add Filter** button. Choose to Include or Exclude from the first drop-down menu. The type of attribute or information you want to Include or Exclude in the second drop-down menu. You select the specific attributes to Include and Exclude in the third drop-down menu.

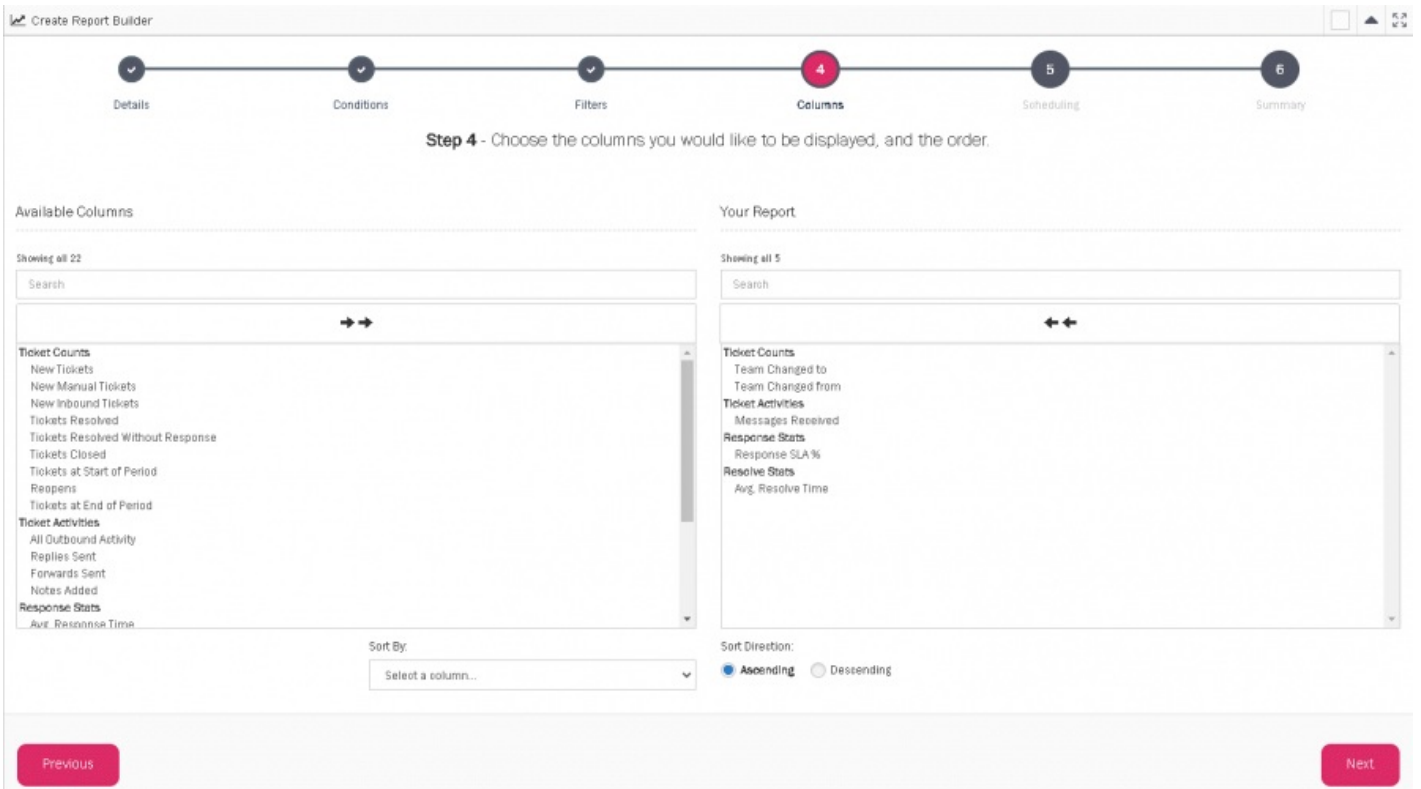
#### Note

You can only have one filter for each attribute type. E.g. You can either Include or Exclude Teams, i.e You cannot set one filter to Include one Team and another Filter to Exclude another as this would be contradictory.

## Step 4

### Include the Columns of your choice for your Report Builder

The Columns on the left are the available Columns that can be added to your Report. The Columns on the right have already been added to your Report and can be removed by clicking on it.



These Columns are broken down into four categories:

- Tickets Counts
- Ticket Activities
- Response Stats
- Resolve Stats

Most of these Column names are self-explanatory, but more information about each Column is available [here](#).

You can include and remove all columns by selecting the two arrow buttons. Alternatively, you can select a specific Column to add or remove by simply clicking on it. You can click and drag to select a range of Columns to add or remove. Click **Next** to proceed.

## Step 5

### Result Format

You can select to make your Report available in additional downloadable formats:

- CSV
- XLSX
- PDF – Only available for Report Builders with 10 Columns or fewer.

If you want to download you generated Reports for this Builder in PDF format, but have already selected more than 10 Columns, you can go back to the previous step and update your selected Columns.

**Step 5 - Schedule the report.**

Result format:  
 CSV  XLSX  PDF

Email result to:  
 People who have access to this builder  and / or

To:   
Press Enter or Comma after typing an email address [Add CC...](#) [Add BCC...](#)

Subject:

Message:

Recurring Reports  
 Repeat...

[Previous](#) [Next](#)

## Email Result

By turning on this option you can choose to email the report from this Report Builder to contact(s) of your choice. Enter the Email address in the **To** field and optionally in the **CC** and **BCC** filed by selecting **Add CC...** and **Add BCC...**

You must enter a Subject and Message at this Step even if you choose not to Email the Results as the Results are sent to your User Email address by Default.

## Recurring Reports

Turn this Option On to set your Report Builder to automatically generate a new Report at a frequency of your choice. With this option Turned On, you first Report will not be generated until the end of the frequency you have selected. E.g. If you set the Report Builder to Repeat every week, the first Report will not be generated until the end of the week. If set to Repeat every month, the first report will not be generated until the end of the month.

If you keep this Option turned Off, your first Report will be generated once the Report Builder is created. You will then be able to manually generate a new Report from this Builder at the click of a button.

## Step 6

Review the Criteria and selections for your Report Builder. Once you're happy with everything, select **Finish** to create your new Report Builder.

Create Report Builder

Details Conditions Filters Columns Scheduling **Summary**

**Step 6 - Summary**

**✓ Complete**

Please review your report builder criteria and then click Finish to create your builder.

Title	Weekly Report
Description	This is a weekly employee report
Shared?	Shared with All Users
Report on	Team
Breakdown by	User
Time Period	Last week
Filters	Exclude users: Danish, Finnish Include status: Closed
Columns	Team Changed to, Tickets Resolved, Messages Received, Response SLA %, Avg. Resolve Time
Order	-
Report Formats	PDF
Email to Shared Users?	NO
External Recipients	-
CC Recipients	-
BCC Recipients	-
Email Subject	Weekly report
Email Message	A weekly report of Teams
Recurring?	NO

Previous Finish

## Additional Actions

There a set of additional actions for each Report Builder you own. These actions are slightly different for Recurring and Non-Recurring Report Builders.

### Recurring

- **Unsubscribe/ Subscribe** – Stop or Start receiving email notifications & attached results when a new Report is generated.
- **Pause/ Resume Generation** – Stop or Start automatic Report generation.
- **Edit** – Update the Title, Description, who the Report Builder is Shared with, who the Report result are emailed to, and the Subject & Message for the sent Email.
- **Remove** – Remove this Report Builder from the System.

### Non-Recurring











- **Unsubscribe/ Subscribe** – Stop or Start receiving email notifications & attached results when a new Report is generated.
- **Run** – Manually Run the Report Builder to create a new Report.
- **Edit** – Update the Title, Description, who the Report Builder is Shared with, who the Report result are emailed to, and the Subject & Message for the sent Email.
- **Remove** – Remove this Report Builder from the System.

## Reports

Report Builder reports are viewed by clicking on the Report Builder option under **Reports** in the main menu. This list consists of available Reports created by yourself and also the reports shared with you/your team.

Search...

Report Builders New Builder

My Builders	Shared with	Recurring	Reports	Created	Actions
<b>Weekly Report</b> This is a weekly employee report	All Users	No	0	by Jayanthi Kumar Sep 19, 2020 @ 5:01pm	   
<b>Test Report</b>	-	No	1	by Jayanthi Kumar Jul 10, 2020 @ 2:26pm	   
Shared with My Teams		Recurring	Reports	Created	Actions
<b>Danish language test</b> beskrivelse danish		No	1	by Danish Apr 07, 2020 @ 1:17pm	
<b>Test report</b> Test for Thomas		No	2	by Thomas Rodseth Oct 14, 2019 @ 4:34pm	

The Results are interactive allowing you to sort the results by selecting the Column header. Results broken down by a subgroup can be expanded by selecting the '+' icon, and collapsed by selecting the '-' icon.

## Integrations

This section contains details about Puzzel Ticketing integrations with other third party applications.

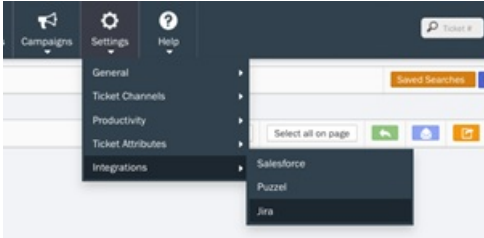
- [Jira integration](#)



## Jira integration

To integrate into your Jira account:

1. Go to **Settings > Integrations > Jira**



2. Fill-out the account credential form



**Your Jira Account is not connected.**

Please provide your Account Credentials below:

Site URL

Project Key

User Email

User API Token

- Site URL - This is your JIRA's site URL
  - Project Key- This is your Jira Software's Project Key which you set upon creating your project and it can also be seen in your browser's address bar (e.g. <https://your-site-name.atlassian.net/secure/RapidBoard.jspa?rapidView=1&projectKey=your-project-key>) **NOTE:** Project Key is case-sensitive.
  - User Email- Your JIRA's user email.
  - User API Token- This is your Jira Software's API Token of a user which you created for API usage or purposes and can also be seen by navigating thru the top/main menu   
Your Avatar > Account Settings > Security (sidebar) > API token > Create and manage API tokens
3. Once you filled-out the fields with the correct credentials, Your Jira account will be connected. You may choose also to edit credentials or disconnect your account.



Thank you for connecting your Jira Account!

<b>Site URL</b>	https://companyname.atlassian.net
<b>Project Key</b>	CO
<b>User Email</b>	username@company.com

Edit Credential

Disconnect