![Puzzel logo - Solving Customer Interactions]

Puzzel Ticketing Agent Guide

This section is dedicated for the Puzzel Ticketing agents to help them understand and work seamlessly with Tickets. This section describes steps and procedures for Puzzel Ticketing in an integrated environment Only. However, the stand-alone environment works mostly in a similar way albeit a few differences.

The agents will be able to have a full customer-centric view of all tickets in a single interface, enabling them to provide a quick and personalised service to the customers.

> **Note**
>
> Please note that the agents are only allowed to view the tickets as per the configuration done by the admins in your organisation.

A typical Ticket page when logged on from Puzzel Contact Centre solution looks like the image below. You can see a list of tickets and its attributes next to it. By clicking on the column header, you can sort them in increasing or decreasing order. By default, you will always see the most recent ticket at the top of the list.
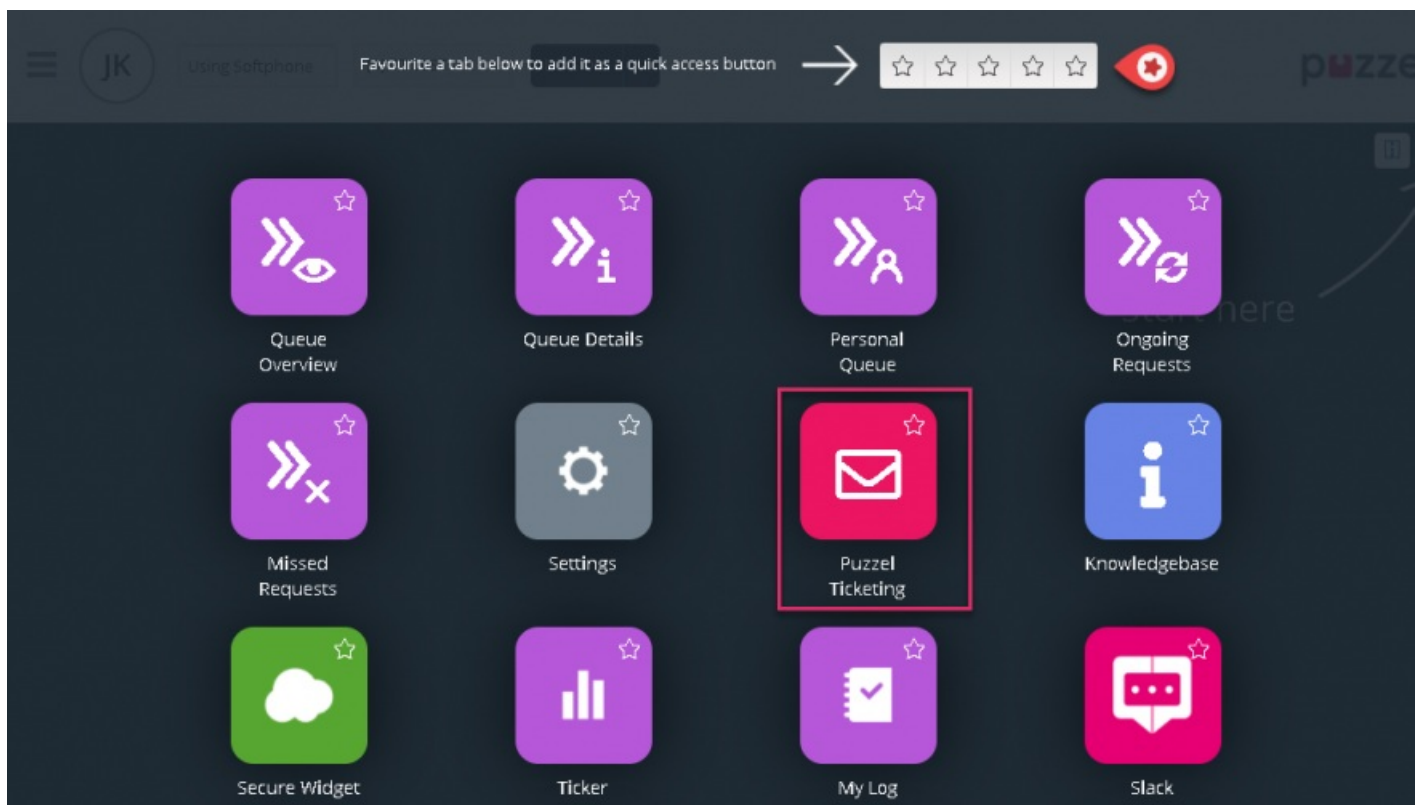

> **Note**
>
> We have SSO from Puzzel Agent Application enabled for all our Puzzel Ticketing users. If you do not have this service enabled in your environment, please contact Puzzel support.

Logging on into Puzzel Ticketing

You can get access into your Puzzel Ticketing environment if you have already signed on into Puzzel Agent Application. Click on the **+** sign on the top right corner of your screen as shown in the picture below.
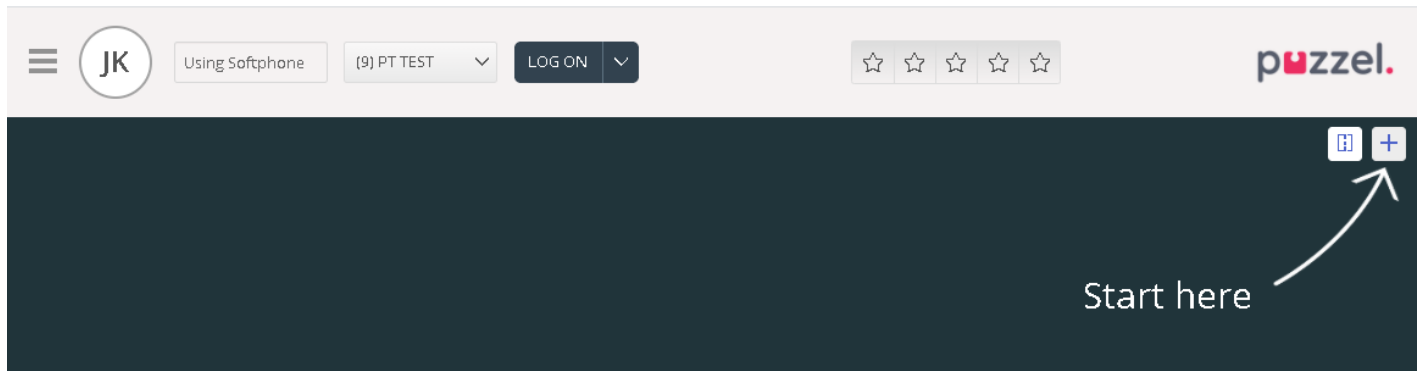
Select **Puzzel Ticketing** widget from the list. You may also set this widget as a quick access or favourite by clicking on the star at the top.

You will now be taken to the Tickets page of Puzzel Ticketing through Single Sign On.

> **Note**
>
> Please note that you have to be logged on into Puzzel Agent Application in order to receive any new notifications. All new tickets will be processed by Puzzel routing engine and assigned to best qualified available agent.

Accepting the ticket through Puzzel Agent Application

If you are in an integrated setup and logged on into Puzzel Agent Application, you can be assigned new tickets based on the skill set and profile you are logged on. An email notification appears as shown below on being allocated a ticket to yourself.
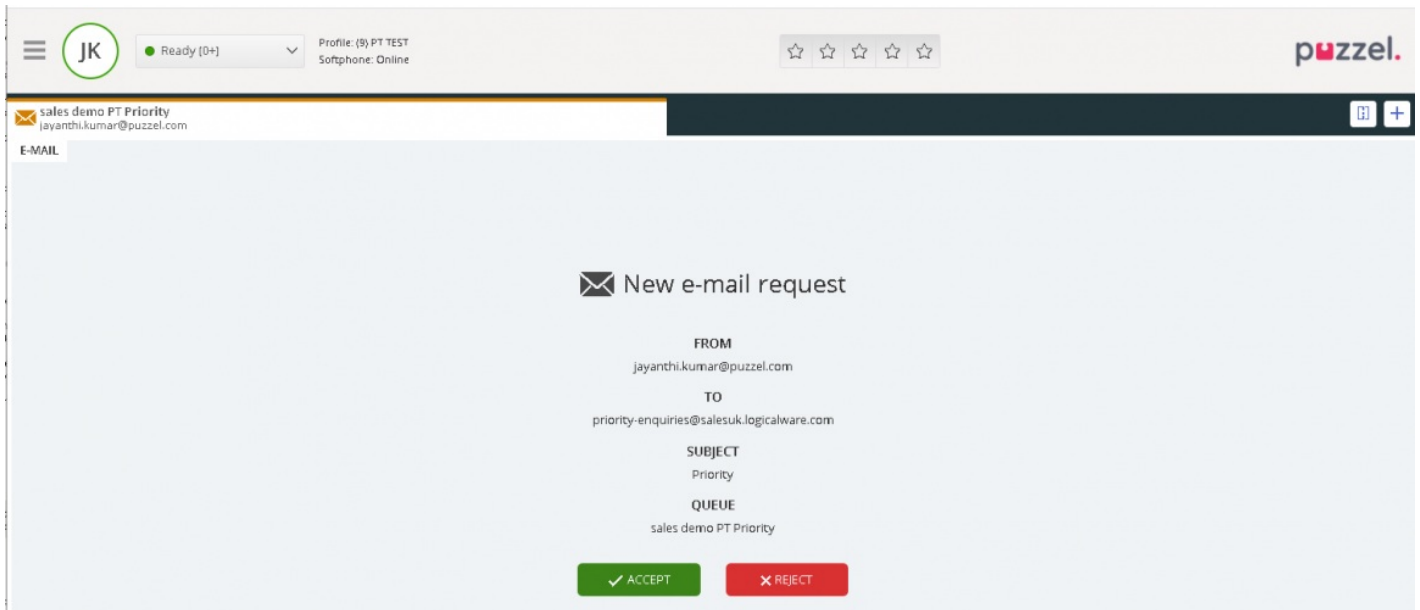
Once you accept the request, you will be taken into the ticket timeline where you can take necessary actions.

If you have the Puzzel Ticketing widget open, the email notification will be received on a separate tab. Upon accepting the request, you will be able to see ticket details on the same tab.
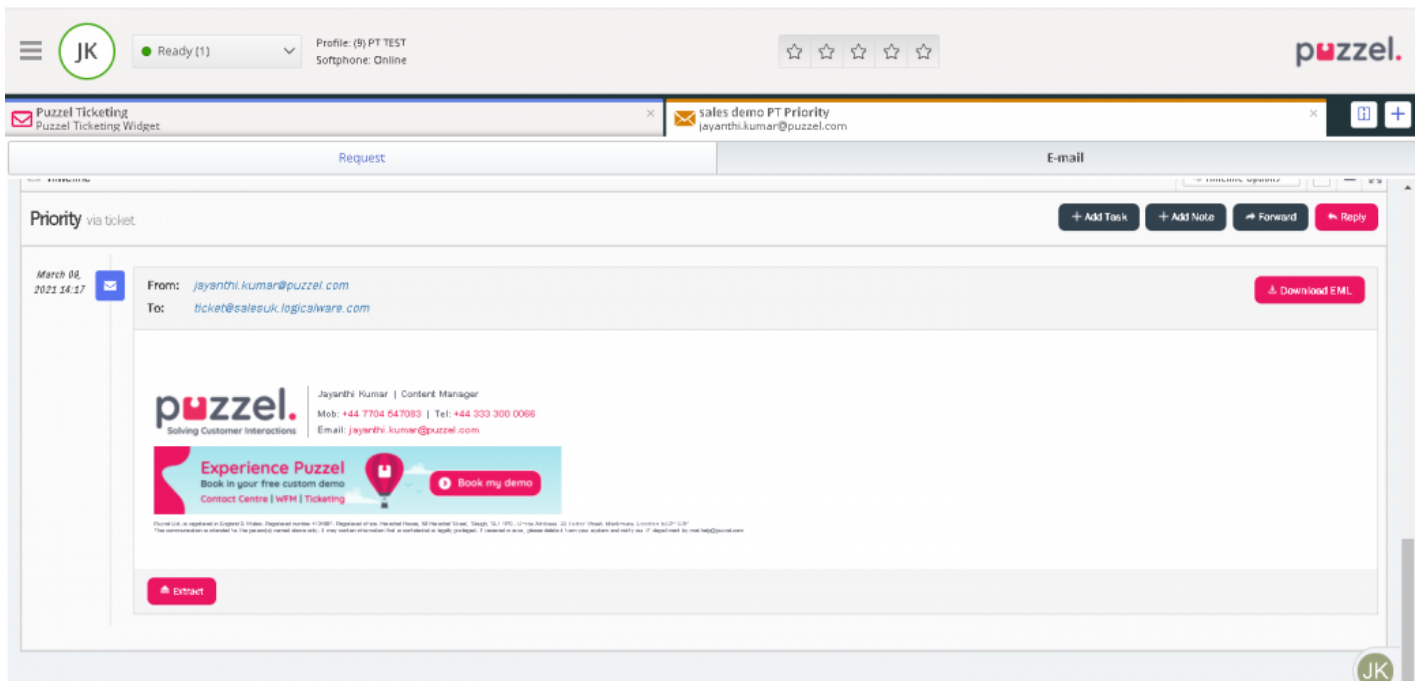
> **Note**
>
> You will only be able to see the ticket details of the ticket you just accepted. To view a complete list of tickets and access agent dashboard, you will have to go to the Puzzel Ticketing widget.

Accessing Agent Dashboard

The dashboard displays the overview of your performance and activity for a period of time. The graph shows for the period chosen from the options at the top of the screen [12h, 1day, 1 week]

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 to the right of the graph. By clicking on individual tickets you will be able to go to the ticket timeline.

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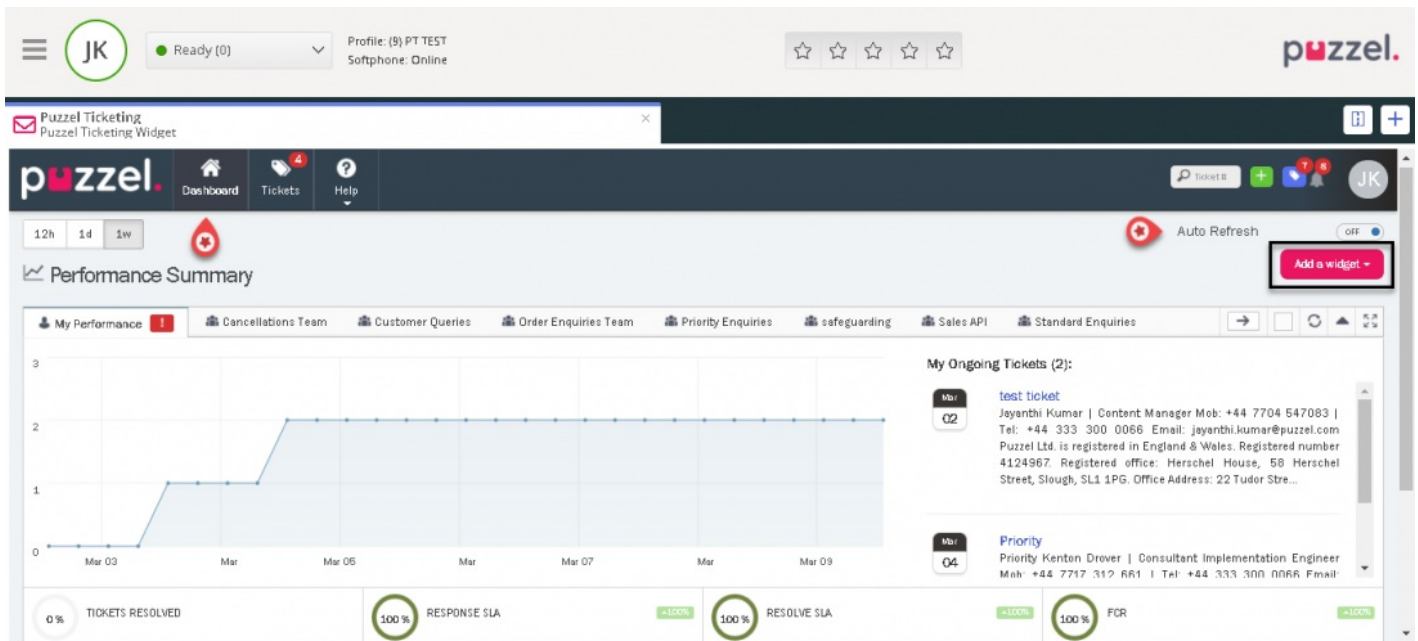
At the bottom, is the list of different statuses available to gauge your performance.A measure of response and resolution times ensures that you are delivering measured and agreed service to your customers. You and your agents can monitor your service level performance and promptly meet your goals as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

You can also add widgets to the dashboard by clicking on the**Add a Widget** button on the top right corner of your screen. Some of the widgets that may be useful in your day to day activities are as listed below:

- **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 my team

- **To do** widget : To do list to manage the ongoing tasks

- **Follow up calendar** : A follow up task can to remind yourself of any upcoming task

To know more about how to create To Do and Follow up task, see the admin guide article[here](#).
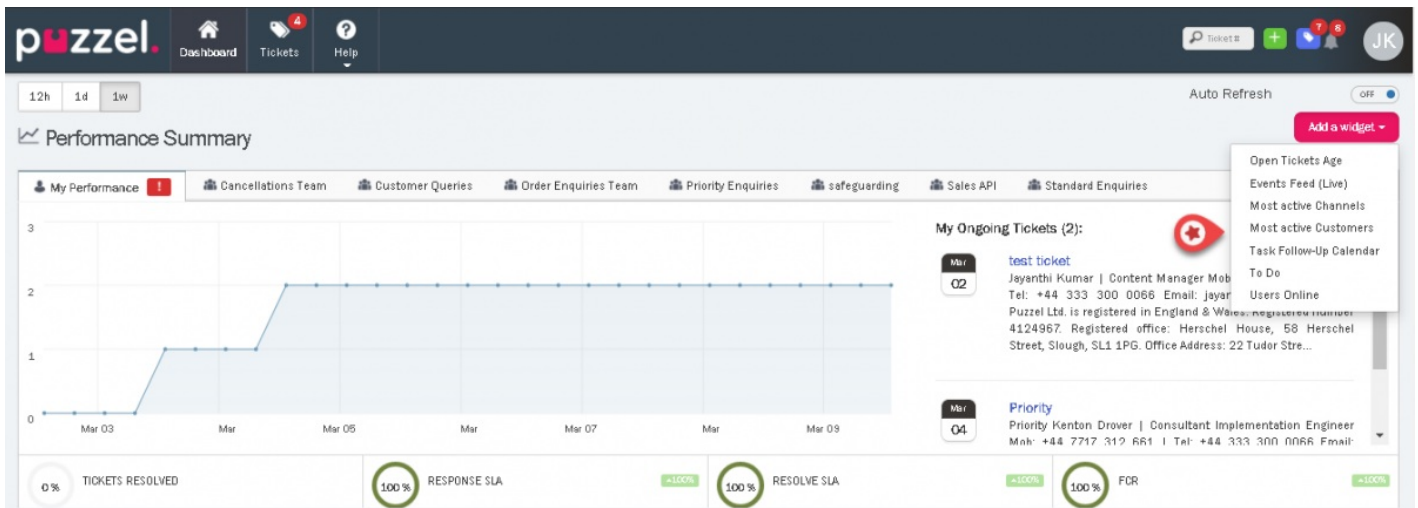
Along with these is the **Events Feed** widget that displays the changes happening to all the assigned tickets. This only includes Tickets you have access to. You can view the ticket details by clicking on the ticket number at any point of time.

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 minimised, maximised or removed as required.

> **Note**
>
> We recommend agents to add To Do and Follow up calendar widgets so that you can keep track of your tasks and receive reminders on time.

Accessing the Ticket list

Depending on the configuration settings done by the admin of your organisation, you will be able to see all tickets that are allowed for your profile. To see the ticket list, click on **Tickets** on the top menu option.

The columns against each ticket displays the attributes for each of those tickets. To view ticket details, click on the ticket number or the subject of the ticket. You can also sort the tickets in ascending or descending order of each of the attributes by clicking on the column header.

Searching a ticket by Ticket Id

As an agent you may want to search a ticket based on Ticket Id and open the ticket to view the details. To search by Ticket id, you need to know the ticket id number that can be searched on.

Enter the Ticket id number in the search box on the top right corner of the screen and hit enter.

If the search has been successful, the ticket details will be displayed for you. In the case of No match for the ticket id entered, an error message will be displayed as shown in the image below.
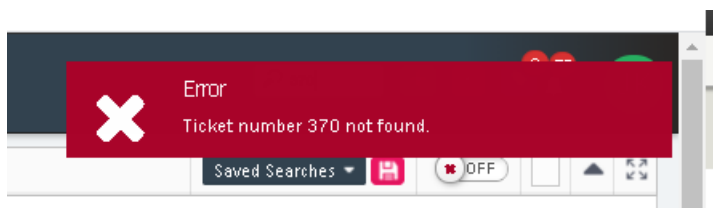
Creating a manual ticket

Apart from automatically being assigned a support ticket, you can also manually create a ticket and assign it to yourself or other members of your team,

To create a manual ticket,

1. Click on the **New Ticket** button on the top right corner of your screen
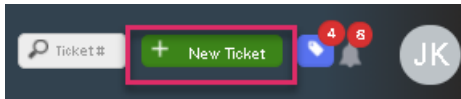
2. Enter the Subject of the ticket and select the team to assign to
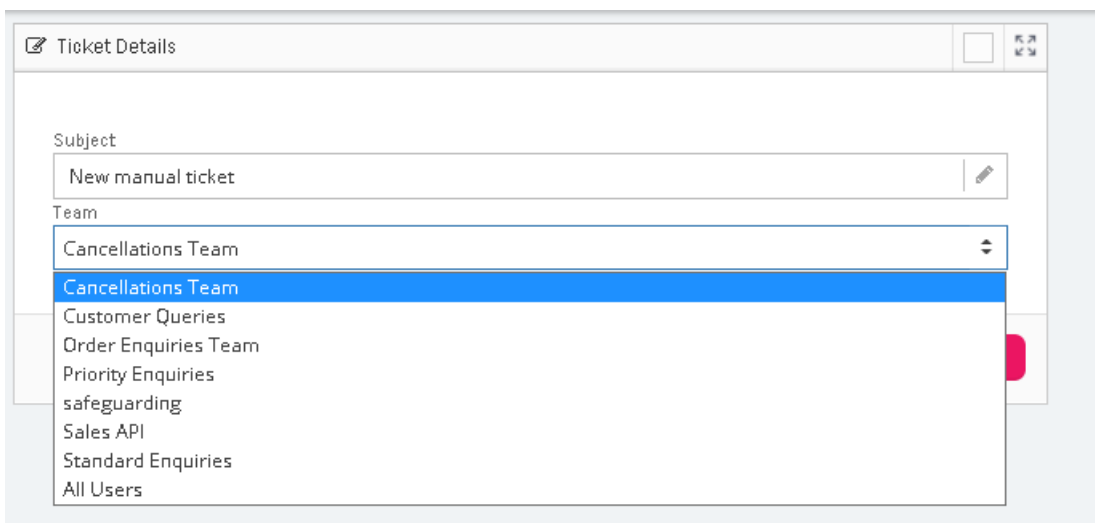
3. Click **Save** to take you to the ticket details page. Here you can add the attributes to the ticket or start a conversation and add more details to the ticket.

Viewing customer details on a ticket

You can view customer information for a particular ticket, by clicking on the initials at the bottom right of your screen on a ticket details page.

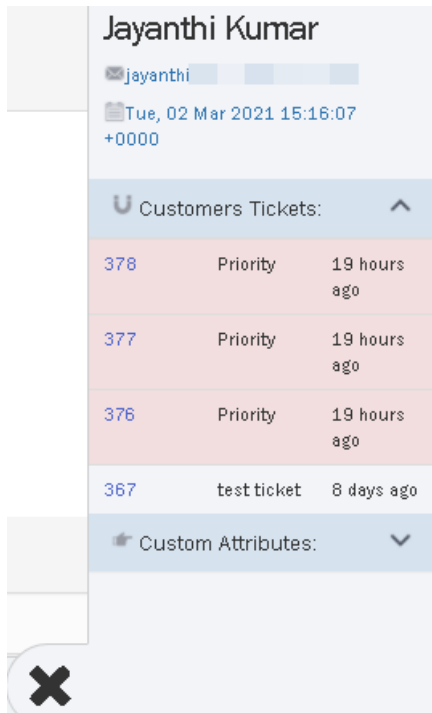
By clicking on the initials, it opens up a sliding window to reveal the customer information such as:

1. customer email id

2. Date and time the first contact was made or ticket created

3. List of all other tickets from the same customer. By clicking on the Ticket number, you can open the ticket details for that ticket.

4. Custom attributes if any

This helps the agent to get a quick view of the customer information.

> **Note**
>
> The customer information may not be available for manually created tickets.

Creating and using a search filter

You can search tickets based on the ticket attributes on the already saved filters created by your team or create a new one yourself based on the criteria.

To search from the available filters, Click on **Saved Searches** option on the top right corner of your screen to show a list of filters available. Click on the filter of your choice to see the results.
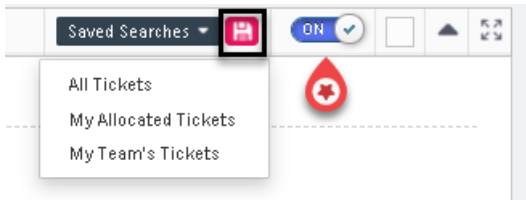
To create a new search filter, enter the attributes you wish to search on. For example, if you wish to search for resolved tickets from Customer queries team, enter the attributes as shown in the figure and click Submit. If you want the results to be listed without clicking the Submit button, toggle the Auto submit button On[see image above]
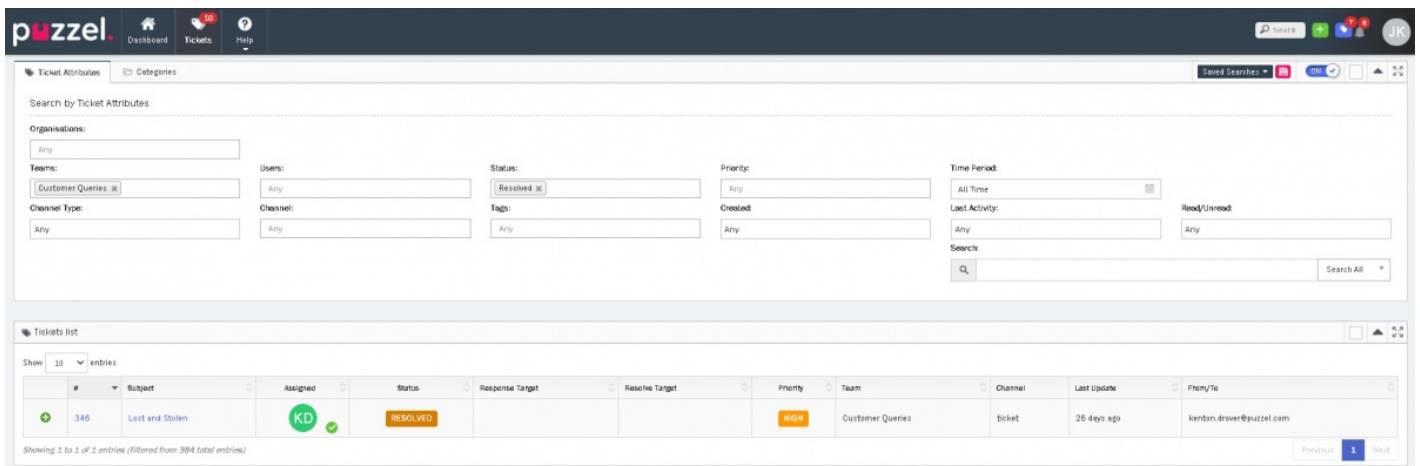
To save this filter so that other members of the team can use it, click on the **Save** icon next to **Saved Searches** option and give it a name and Save it.

Managing personal address book

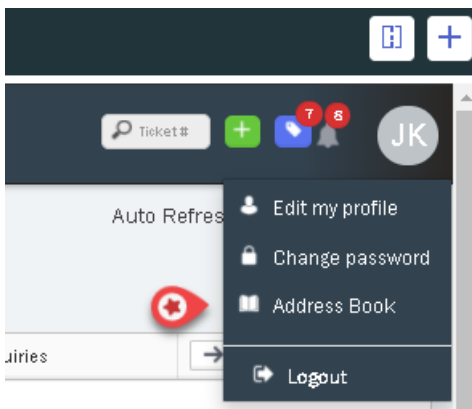You can maintain your personal address book in Puzzel Ticketing with the necessary contact details as shown below.
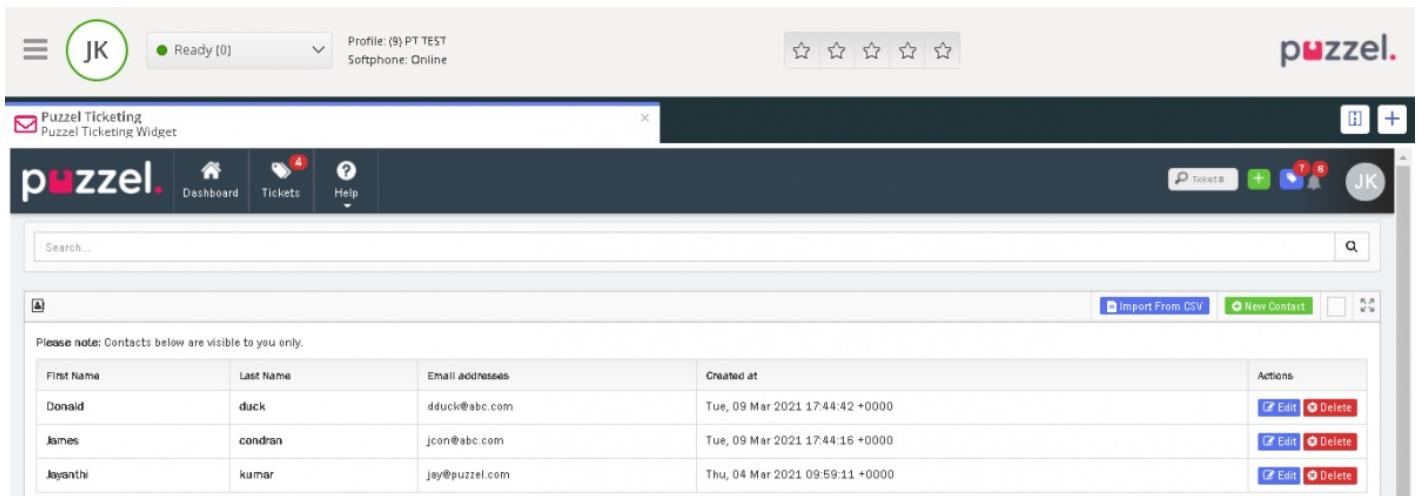
To add a address book entry, click on the user profile icon on the top right corner of your screen and select **Address Book** from the drop-down menu.

You can either import a contact list from a CSV file or manually add them yourself. Click on the **New Contact** option to manually add an entry. You will now be presented with the **Contact** screen, where you can add the details and Save.

> **Note**
>
> Remember to click on the arrow button as shown in the picture before saving.


Editing and Deleting contact entry

To edit an entry, click on the [Edit] next to the entry you wish to edit. This will take you to the contact screen. Make the necessary changes and Save the entry.

To delete a contact, click on [Delete] next to the entry you wish to delete. Click on **Confirm** to affirm your decision.

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
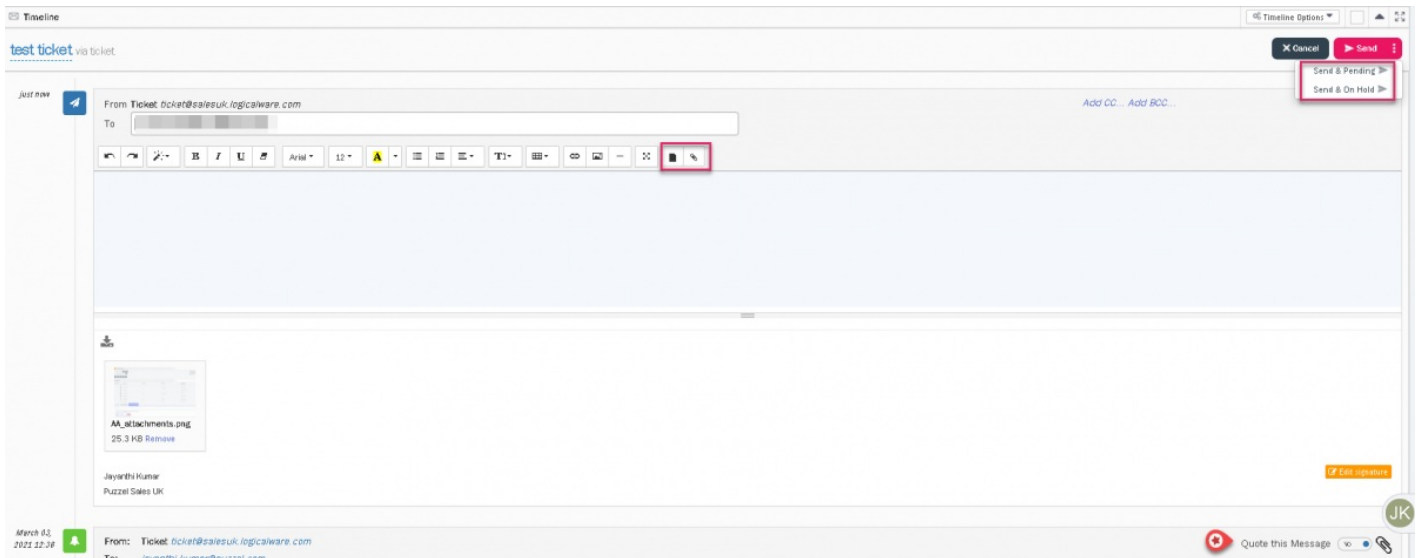
3. The **To** field is auto populated but can be amended. You can either type the email address or choose from the list you've added in the address book and start to compose the message.

4. You can also edit signature by clicking the edit signature (unless this is locked down in permissions).

5. You can also use templates to reply using the**Template** option in the toolbar.

6. Attach any files if required.

7. Upon completing the editing, you can click on send. Sending the reply has 3 options as listed below:

   - **Send** : Means the reply will be sent and ticket status will be marked as resolved

   - **Send & Pending** : Means the reply has been sent but ticket status is Pending (i.e. waiting on information from customer to be able to resolve)

   - **Send as on-hold** : Means the reply has been sent and ticket status is On-Hold (i.e. waiting on internal information)

The ticket status can be changed manually if required from the Status attribute drop-down box at the top.
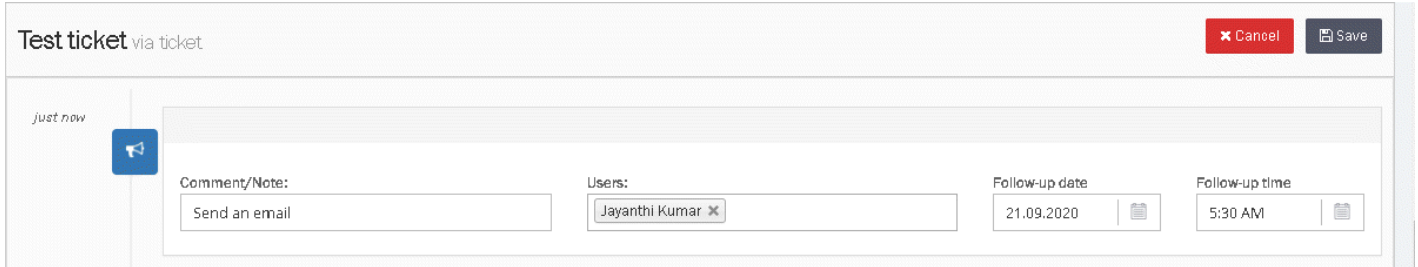
Messages can also be forwarded in a similar way to reply by clicking on the**Forward** button on the ticket timeline.

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.
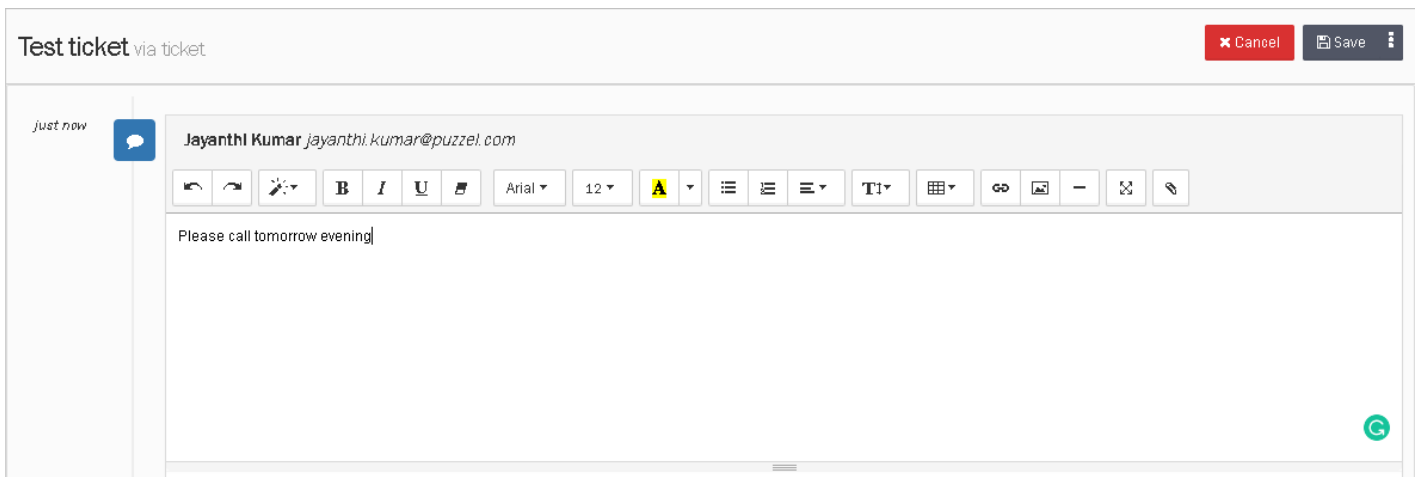
Adding Task and Note on a ticket timeline

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.**

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.

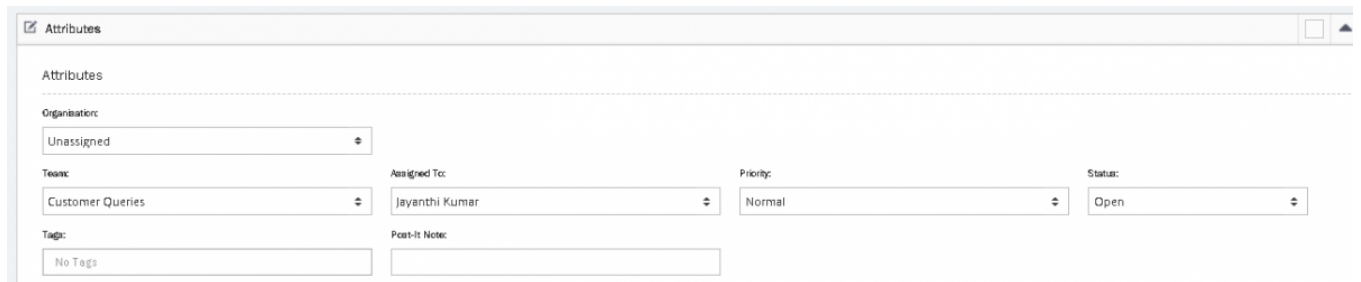To add a note, click on the [+ Add Note] icon, compose the note and save.

Adding attributes to the ticket

Ticket attributes are a set of information that describes a ticket. Regardless of how the ticket was created[automatic/manual], the attributes can still be changed to reflect the current status.

Each ticket can be assigned with a number of attributes which are easily editable by the agents. Depending on what attributes are allowed by your admin, you will be able to see and change the attribute values for the tickets. Some of the key attributes are:

- Organisation : Organisation related to a ticket

- Team: The team that needs to deal with the ticket

- Tags: Specific way in which the ticket or query has been named

- Assigned to: The agent assigned to for dealing with the query

- Post it note: Notes that agent can leave to himself or others about the ticket

- Priority: Urgency in which the ticket needs to be dealt with - Lowest, Low, normal, high, highest

- Status: Current status of a ticket : Open, pending, on hold, resolved.

You can click on the box for each of the attributes to see a drop-down list of options available. Select the appropriate one and save the changes.

Adding attachments to tickets

Agents can include file attachments in the ticket comments. The attachments can be sent to customers in two formats as stated below:

- As an attached file size less than 10mb

- As a downloadable link if the file size is going to be more than 10mb

Admins can decide the behaviour of the attachment files by gauging the file size they are going to use within their organisation. Please bear in mind that it is going to be one or the other and not both. If the first method is chosen, then you might receive error messages if files more than 10mb are being sent in reply to a customer query.

To attach a file to a ticket, you need to

1. Open the ticket and click on reply to open the editor.

2. Click on the paperclip icon and select the file you want to attach
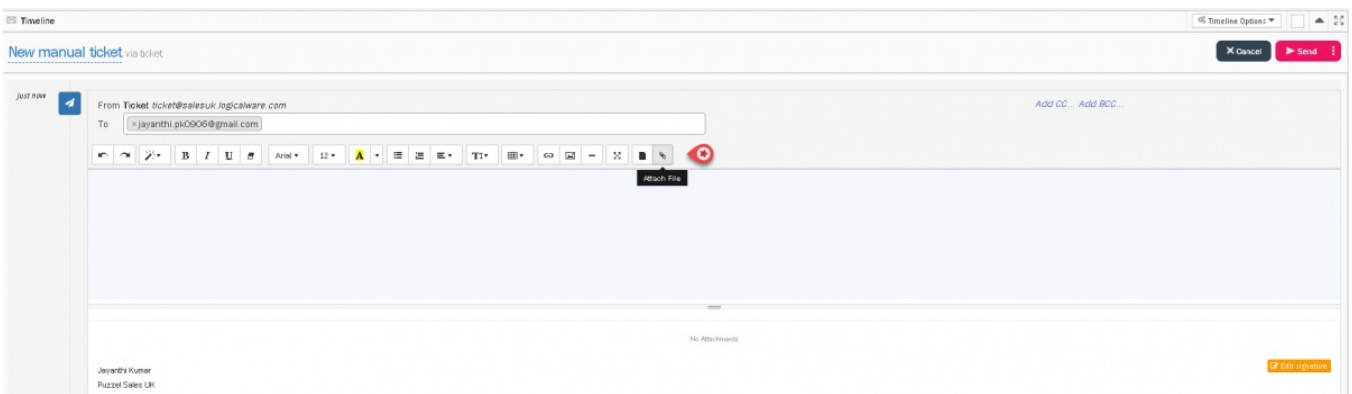
3. Click **Done** to see the file attached and hit send.
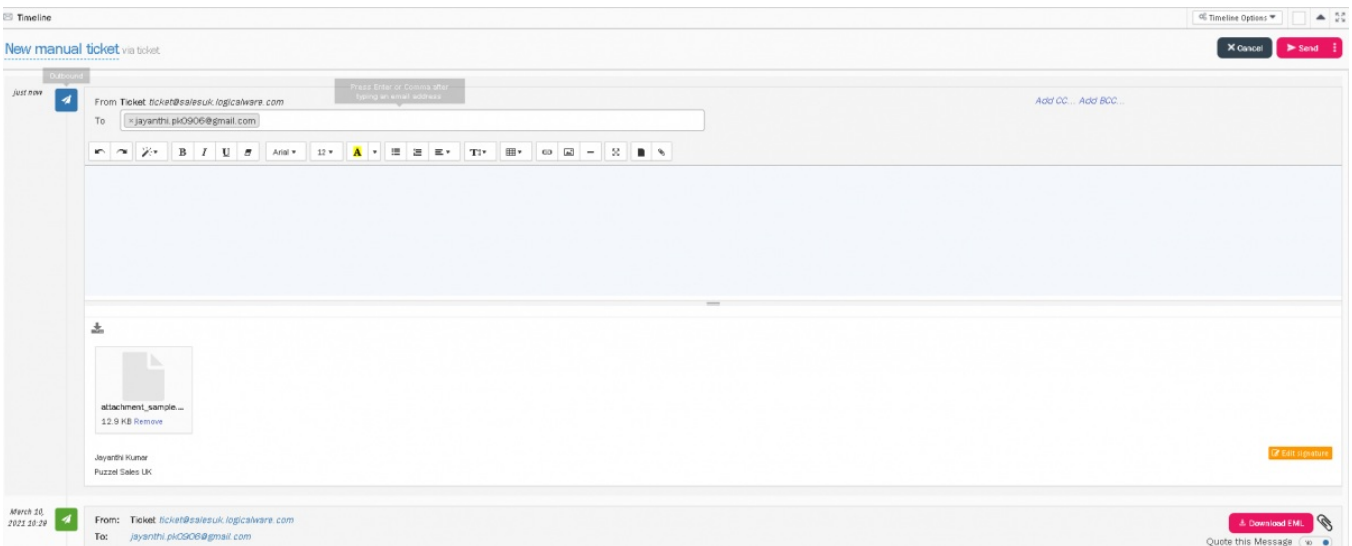
Please note that in the agent view the file will always appear as an attached file even when your organisation has chosen the attachment to be a downloadable link. However, the recipient will see the file as downloadable link as shown in the picture below.

Ticket <ticket@salesuk.logicalware.com>

to me ▾

This ticket was created by the agent after the customer requested for it.


Jayanthi Kumar

Puzzel Sales UK

Attachments

🔗 attachment_sample.docx (12.9 KB)

↩ Reply   ➡ Forward

Timeline Options

There are several timeline options available as detailed in the table below. These options can be used to show all ticket updates and notifications, related to a person or a business rule. By looking at the ticket events, you can see the complete history of a ticket. These include ticket properties that are added, removed, or changed, as well as any external notifications associated with the ticket update.
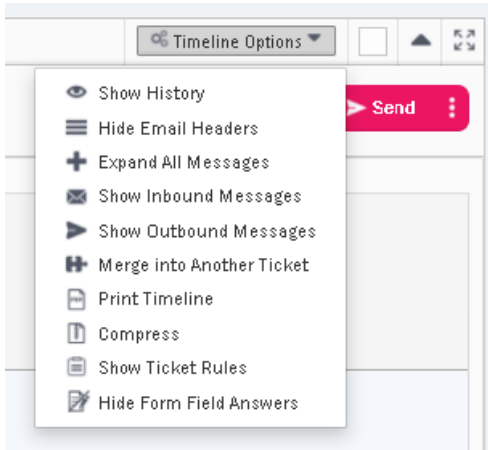
Timeline Option	Description
Show/Hide History	Shows/hides past events that has happened on the ticket
Show/Hide Email Headers	Shows/hides header details in the email
Expand All Messages	it expands all the previous emails and the recent one
Show Inbound Messages	Only displays inbound messages relating to the ticket
Show Outbound Messages	Only displays Outbound messages relating to the ticket
Merge into Another Ticket	Allows to merge with another ticket in the system
Print TImeline	Prints the entire timeline details on to a PDF and emails it to the customer
Compress	Emails the timeline details on to a PDF and emails it in a compressed format
Show Ticket Rules	Displays all the ticket rules applied on the ticket
Show/Hide Form Field Answers	Displays all the form fields assigned to the ticket