

Stellar-OB-007-Freshdesk status

Freshdesk Status

This document is prepared to explain various statuses configured in Freshdesk for SOLVAY. Through this document you will be able to understand which status should be used at basic situation.

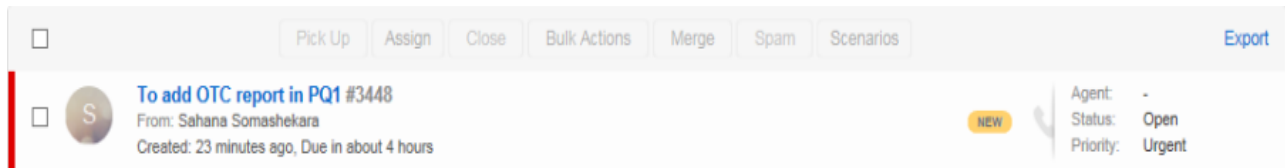
List of the statuses available in Freshdesk are:

1. **Open**
2. **Pending**
3. **Need for more information**
4. **Waiting on Third party**
5. **Transferred**
6. **Transferred to CM**
7. **Resolved**
8. **Activities before closure**
9. **Closed**

P.S: All are explained according to the best practice in this document.

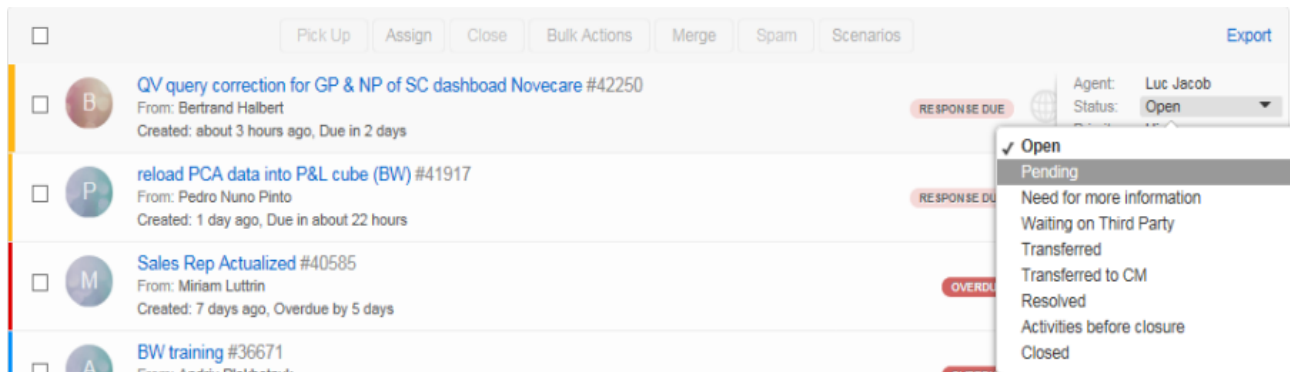
Open:

- If ticket is new, automatically assigned status to Open.
- Any ticket created will be in **Open** status i.e. ticket is not acknowledged yet by any agent.
- A ticket is assigned to a group. Dispatcher of that group can assign among the available agent based on the skill/domain. It is an agent's responsibility to change the status of the ticket further as required.



Pending:

- If ticket is assigned to a Group, Agent. Pending status is updated.
- Pending status in Freshdesk means "**Work in progress**".
- After a ticket is dispatched to L1 queue, an agent should acknowledge the ticket by changing the ticket status to Pending status. This means, a ticket has been acknowledged and an agent is working on the ticket.
- The change in status can be done either in ticket dashboard or in ticket properties after opening a ticket.



- **Ticket properties:**

▼ Ticket Properties Update

Priority * Status *

High Open

Source Open

Portal Pending

Group * Need for more information

IS-CGI-L2-TECHNO Waiting on Third Party

Agent Transferred

Luc Jacob Transferred to CM

Resolved

• [Freshdesk SLA:](#)

Edit SLA Policy

Name

Description

SLA Targets

Set Service Level Targets for each ticket priority

Important:
 1. Response and resolution time should be within 13 min to 12 months.
 2. Reminder and escalation emails should be configured and enabled in Admin > Email notifications

Priority	Respond within	Resolve within	Operational Hrs	Escalation email
Urgent	30 Mins	4 Hrs	Business Hours	CM
High	1 Hrs	2 Days	Business Hours	CM
Medium	2 Hrs	3 Days	Business Hours	CM
Low	3 Hrs	5 Days	Business Hours	CM

Apply this to:

Choose when this SLA policy must be enforced

Group IS-CGI-L1-SAP IS-CGI-L1-NONGAP IS-CGI-L1-AM IS-CGI-L2-EP IS-CGI-L3-EP IS-CGI-L3-OTC IS-CGI-L3-OTC IS-CGI-L3-PTP IS-CGI-L3-PTP

Type IS Request

[Add new](#)

[Set SLA reminders](#)

Need for more information:

- Ticket was answered and agent waits for request from the user.
- While working on the ticket if an agent feels like they **need more information** on the issue from user then status should be updated as **"Need for more information"** and should send a reply to user.
- As soon as the user replies to email, Freshdesk will pop up a status saying user has replied. **This will be applicable if the user is able to communicate in English.**
- If any language translation is required then the ticket status needs to be changed as **Need for more information** and send that ticket to L0, by changing the group.
- Click on Reply button, and write the content, and click on send button and set status as **"Send and set as need for more information"**.

From: Solvay SBS Pilot <support@sbspilot.freshdesk.com>

To: Cc Bcc

B *I* U

[This reply refers to Ticket: 3479 - <https://sbs-support-dev.solvay.com/helpdesk/tickets/3479>]

Hi Sahana Somashekara

Need further details

...

[+ Attach a file](#) [Attach from Google Drive](#) (Total File size < 15 MB) Cancel Send

Send and set as Pending

Send and set as **Need of more information**

Send and set as **Waiting on Third Party**

Send and set as **Transferred**

Send and set as **Transferred to CM**

Send and set as **Resolved**

MB) Draft Saved Cancel Send

- This activity will be popped up in activity list of ticket.

Harsha Uppasettyraghava replied a few seconds ago (Thu, 1 Sep at 2:58 PM)

Replied to : sahana.somashekara@cgi.com

[This reply refers to Ticket: 3479 - <https://sbs-support-dev.solvay.com/helpdesk/tickets/3479>]

Hi Sahana Somashekara,

Need further details

- Ticket status has been changed as Need for more information

Ticket Properties Update

Priority * Status *

Low Need of more inf...

- This will stop the clock in Freshdesk.

Need of more information
 Since a minute ago
 from Thu, 1 Sep at 3:09 PM

- User will receive an email like below

Re: 3479 issue in bex report

Solvay SBS Pilot <support@sbspilot.freshdesk.com>

i If there are problems with how this message is displayed, click here to view it in

Sent: Thu 9/1/2016 2:59 PM
 To: Somashekara, Sahana

[This reply refers to Ticket: 3479 - <https://sbs-support-dev.solvay.com/helpdesk/tickets/3479>]

Hi Sahana Somashekara,

Need further details

On Thu, 1 Sep at 2:42 PM , Sahana Somashekara
 <sahana_somashekara@cgi.com> wrote:
 issue in bex report

**

- Ticket Dashboard will look like below:

S

issue in bex report #3479

From: Sahana Somashekara

Agent responded: 2 minutes ago, Need of more information for 2 minutes

Agent: -

Status: Need of more I...

Priority: Low

- As soon as the user responds to the ticket a status will pop up as customer responded in ticket dashboard.

S

issue in bex report #3479

From: Sahana Somashekara

Customer responded: less than a minute ago, Due in 6 days

CUSTOMER RESPONDED

Agent: -

Status: Pending

Priority: Low

- And status will change as Pending by freshdesk automatically.

Waiting on Third party:

- **Ticket was transferred to entity external to applications (vendor, supplier, infrastructure)**
- This status will be updated when ticket is transferred to external entity.

Example Vendor, SAP, Supplier etc.

- To update the ticket into status **"waiting on third party"**, we need to change the status in ticket properties tab and update the ticket.

Transferred:

- **When a ticket is transferred to specific groups and must be signaled like that. Used in specific processes (e.g. HtR) no agent is assigned.**
- When a ticket is transferred to specific groups they must be indicated like this.
- We use this option, when we are transferring tickets from one group to other.

For example:

- A ticket is with IS-CGI-L2-Techno, an agent who is working on the ticket feels like they need information from functional team, a ticket can be transferred to IS-CGI-L2-OTC.
- When the ticket is transferred the status should be changed to **"Transferred"** and change the group name.

Update the status:

The screenshot shows the 'Ticket Properties' form with an 'Update' button. The 'Status' dropdown menu is open, showing options: Open, Pending, Need for more information, Waiting on Third Party, **Transferred** (highlighted), Transferred to CM, and Resolved. Other fields include Priority: High, Source: Portal, Group: IS-CGI-L2-TECHNO, and Agent: Luc Jacob.

- **Change the group name:**


The screenshot shows the 'Group' dropdown menu with a search bar containing 'otc'. The list of groups includes: IS-CGI-L2-OTC (highlighted), IS-CGI-L3-OTC, IS-OTC-A2S, IS-OTC-CRM-SFDC, IS-OTC-CRM-SFDC-TCK, IS-OTC-CRM-SMART, IS-OTC-GTS, IS-OTC-Reporting, and IS-OTC-SD-LE. The current group is IS-CGI-L2-TECHNO.

Transferred to CM:

- When a ticket is transferred to Solman/other change management tools in use - e.g. Otc CRM - PMO Toolkit
- When a ticket is transferred to change management system the **"Transferred to CM"** status is updated
- This will stop the SLA clock in freshdesk.

Transferred to CM
 Since 11 minutes ago
 from Thu, 1 Sep at 3:14 PM

- This will update the ticket as below

 SolMan Solvay added a private note 37 minutes ago (Thu, 1 Sep at 3:26 PM)

900 - RFC Created
7000002500
http://solia.solvay.com/irj/portal/go?url=http%3A%2F%2Fds1sapsm.ibm.be.solvay.com%3A8040%2Fsap%2Fbc%2Fbsp%2Fsap%2Fcm_ui_start%2Fdefault.htm%3FCRM-OBJECT-TYPE%3DAIC_OB_CMCR%26CRM-OBJECT-ACTION%3DB%26CRM-OBJECT-VALUE%3D57C617C8AD9F1ED0E100800096FB770F

Activities before Closure:

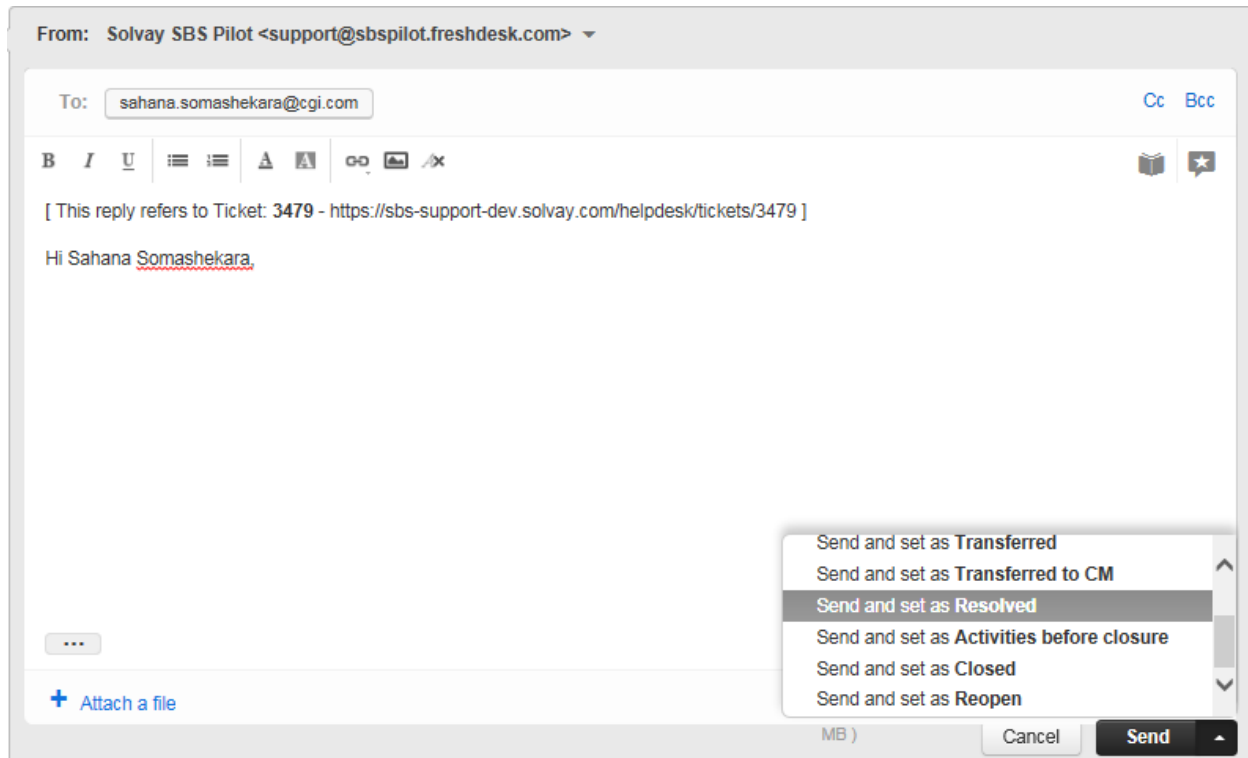
- When a resolved ticket requires some additional actions before closure. Example: it needs to be translated to requester's language.
- When a resolved ticket requires some more additional actions before closure then we will keep a ticket in this status.

Example:

A ticket needs to be translated to requester's language.

Resolved:

- Used when a solution is found and proposed to user. May be closed automatically.
- If a solution is found by an agent, the detailed solution will be proposed to the user by resolving the ticket.
- By replying the solution to a user and update a status as "set a status as resolved".



From: Solvay SBS Pilot <support@sbspilot.freshdesk.com>

To: sahana.somashekara@cgi.com

[This reply refers to Ticket: 3479 - <https://sbs-support-dev.solvay.com/helpdesk/tickets/3479>]

Hi Sahana Somashekara

Send and set as Transferred
Send and set as Transferred to CM
Send and set as Resolved
Send and set as Activities before closure
Send and set as Closed
Send and set as Reopen

Cancel Send

- User will receive an email on resolving the ticket.

Closed:

- Closed tickets

A ticket can be closed in 3 ways are:

- By user
- By agent
- Auto closed

By user:

- User can mark the ticket as closed from customer portal after a solution is proposed by agent.
- When an agent finds a solution, they should reply to user and mark the ticket as resolved.

From: Solvay SBS Pilot <support@sbspilot.freshdesk.com> ▾

To: sahana.somashekara@cgi.com Cc Bcc

B I U | | | **A A** |

[This reply refers to Ticket: **3448** - <https://sbs-support-dev.solvay.com/helpdesk/tickets/3448>]

Hi Sahana Somashekara,

We have done the implementation. Please check

Send and set as **Transferred**

Send and set as **Transferred to CM**

Send and set as **Resolved**

Send and set as **Activities before closure**

Send and set as **Closed**

Send and set as **Reopen**

Draft Saved

- After a ticket is resolved, ticket looks like below in dashboard

To add OTC report in PQ1 #3448 From: Sahana Somashekara, Resolved: 4 minutes ago Please add OTC report in PQ1	Agent: Harsha Uppasettyraghava Status: Resolved Group: IS-COI-L2-Techno
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- When a ticket as a status "**resolved**", user will receive an email communication from freshdesk, stating the ticket has been resolved.

If there are problems with how this message is displayed, click here to view it in a web browser.

From: Solvay SBS Pilot <support@sbspilot.freshdesk.com>

To: Somashekara, Sahana

Cc:

Subject: Re: 3448 To add OTC report in PQ1

[This reply refers to Ticket: **3448** - <https://sbs-support-dev.solvay.com/helpdesk/tickets/3448>]

Hi Sahana Somashekara,


We have done the implementation. Please check

- User can view the list of ticket and their status in customer portal of user. User will have an option on right hand side of the ticket to **"Mark the ticket as closed"**.




Home / Tickets list

Resolved since 2 minutes 2 seconds

#3448 To add OTC report in PQ1

 **Sahana Somashekara**
reported 8 days ago

Mark ticket as closed


  


- When the user mark the ticket as closed, user will get a below pop up.

Your ticket has been successfully closed.


- This will also trigger an email notification to user, like below.

Ticket Closed - To add OTC report in PQ1

 Solvay SBS Pilot <support@sbspilot.freshdesk.com>

 If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 9/8/2016 9:21 AM

To:  Somashekara, Sahana

Dear Sahana Somashekara,

Your ticket - To add OTC report in PQ1 - has been closed.

We hope that the ticket was resolved to your satisfaction. If you feel that the ticket should not be closed or if the ticket has not been resolved, please reply to this email.

Would you mind to take a brief survey about our service? click in the link below:


[click here](#)

Sincerely,

Solvay SBS - Test environment Support Team

<https://sbs-support-dev.solvay.com/helpdesk/tickets/3448>

- On agent's portal, the ticket looks like below in ticket dashboard.

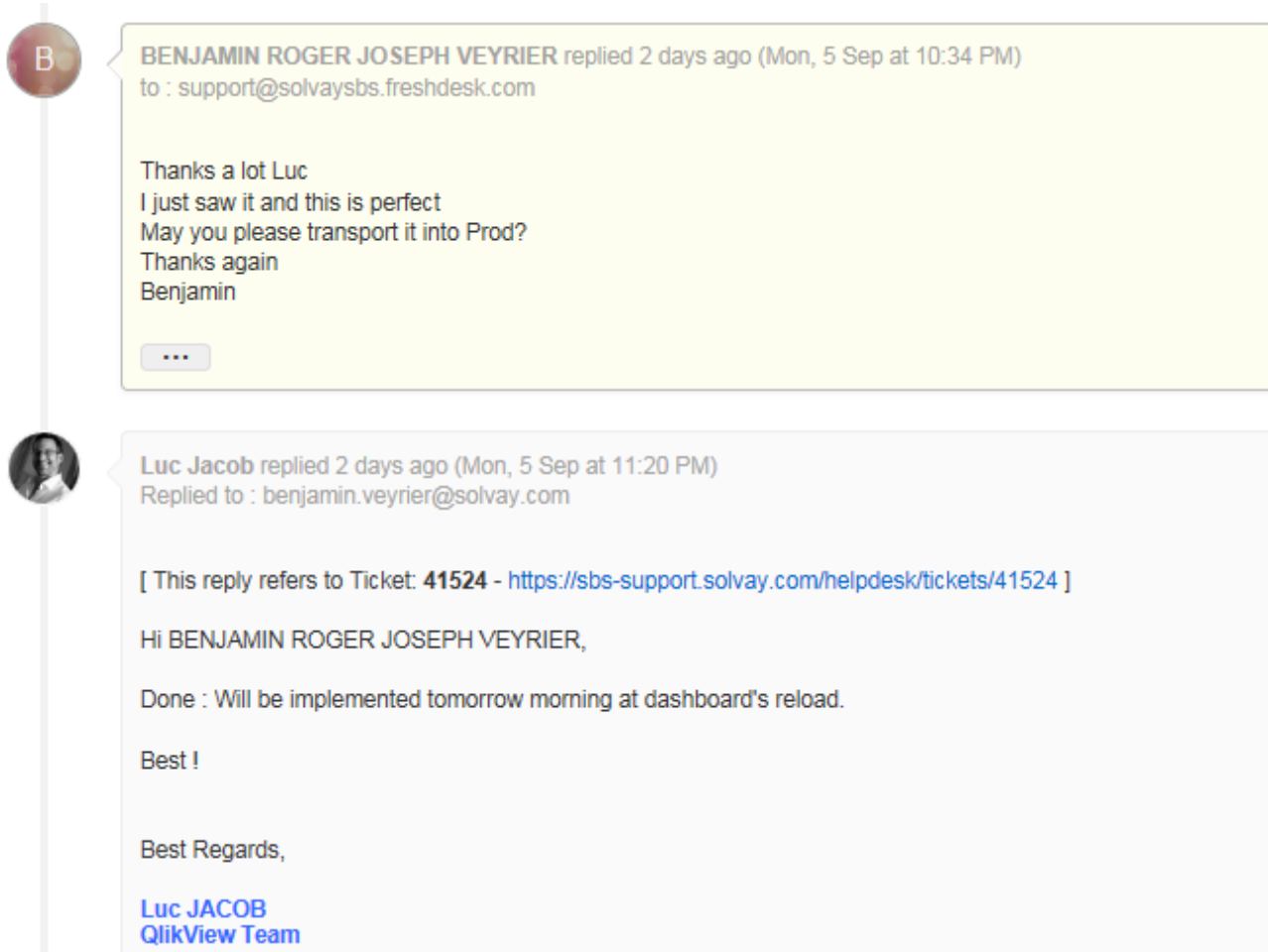
 **Sahana Somashekara** updated ticket status of **To add OTC report in PQ1 (#3448)** to Closed
2 minutes ago

 **To add OTC report in PQ1 #3448**
From: Sahana Somashekara, Closed: 3 minutes ago
Please add OTC report in PQ1

Agent: Harsha Uppasettyraghava
Status: Closed
Group: IS-CO+L2-Techno

By agent:

- An agent can also change the ticket status to closed, if the user confirms that provided solution is useful.



The image shows a vertical timeline of a ticket conversation. On the left, a vertical line has two circular profile icons. The top icon is a red circle with the letter 'B'. The bottom icon is a circular photo of a man. The messages are contained in rounded rectangular boxes that branch off from the timeline.

BENJAMIN ROGER JOSEPH VEYRIER replied 2 days ago (Mon, 5 Sep at 10:34 PM)
to : support@solvaysbs.freshdesk.com

Thanks a lot Luc
I just saw it and this is perfect
May you please transport it into Prod?
Thanks again
Benjamin

...

Luc Jacob replied 2 days ago (Mon, 5 Sep at 11:20 PM)
Replied to : benjamin.veyrier@solvay.com

[This reply refers to Ticket: **41524** - <https://sbs-support.solvay.com/helpdesk/tickets/41524>]

Hi BENJAMIN ROGER JOSEPH VEYRIER,

Done : Will be implemented tomorrow morning at dashboard's reload.

Best !

Best Regards,

Luc JACOB
QlikView Team

Auto closed:

- If the ticket is not marked by user as closed and if agent also have not marked ticket as closed, then fresh desk will mark resolved tickets as closed after "**defined days**" in system.

Example:

If the ticket is not marked as closed within 5 days, all resolved tickets will be marked as closed after 5 days.