How to create a new Service Desk ticket on behalf of a user

Click 'Staff Panel' > 'Tickets' > 'New Ticket'

- Staff and admins can create tickets on behalf of users from the 'Tickets' interface. You might want to do this if, for example, a customer described their issue over a phone call.

- Staff can also create tickets for issues that they resolved, but which had no ticket. This is useful to record time spent/materials used and bill accordingly.

    - Select 'Work done in the past' to enable this option.

    - Tickets for completed tasks are given a status of 'Closed'.

Click the following links for help with each task:

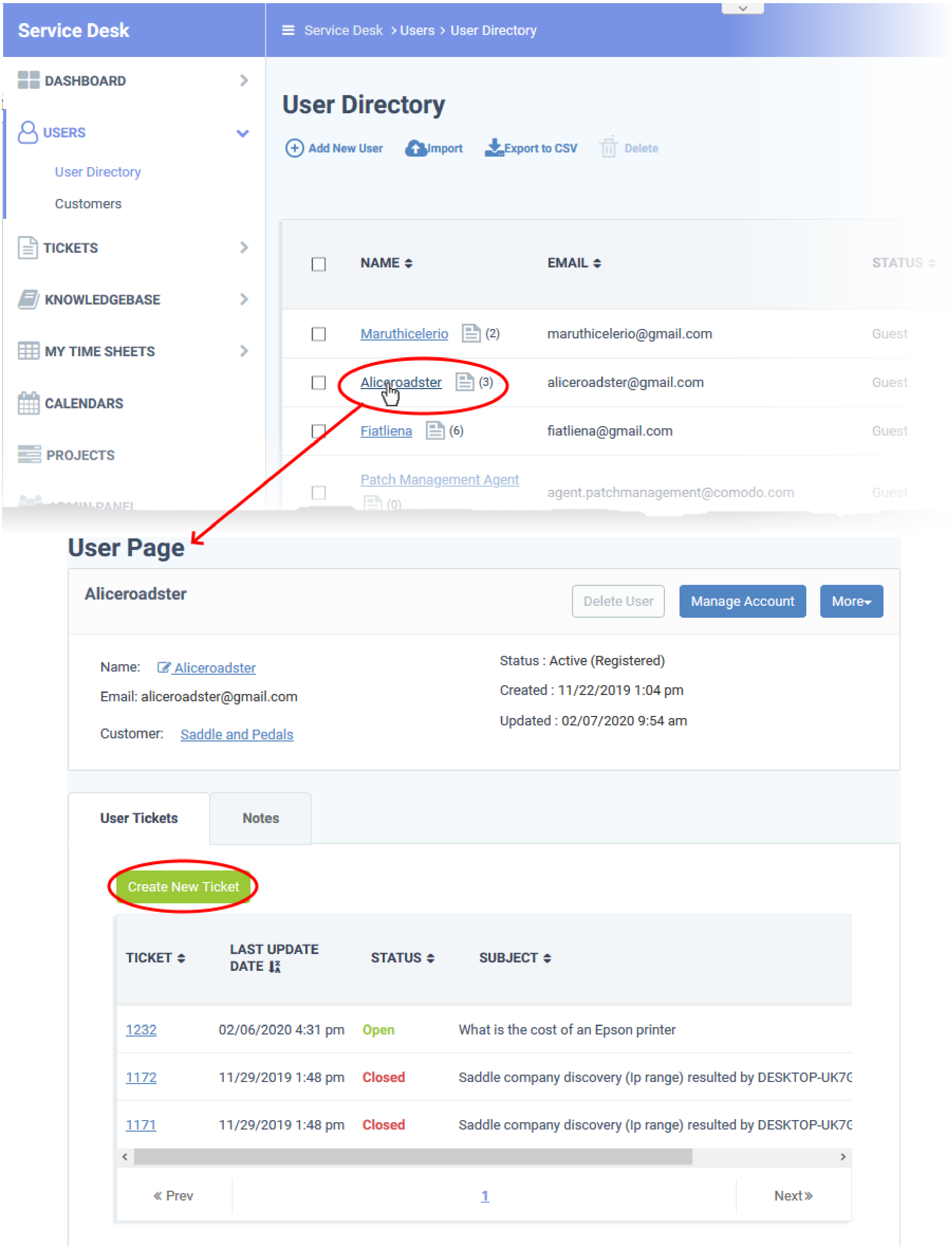
Create a ticket by selecting a user from the directory

- Open the staff panel

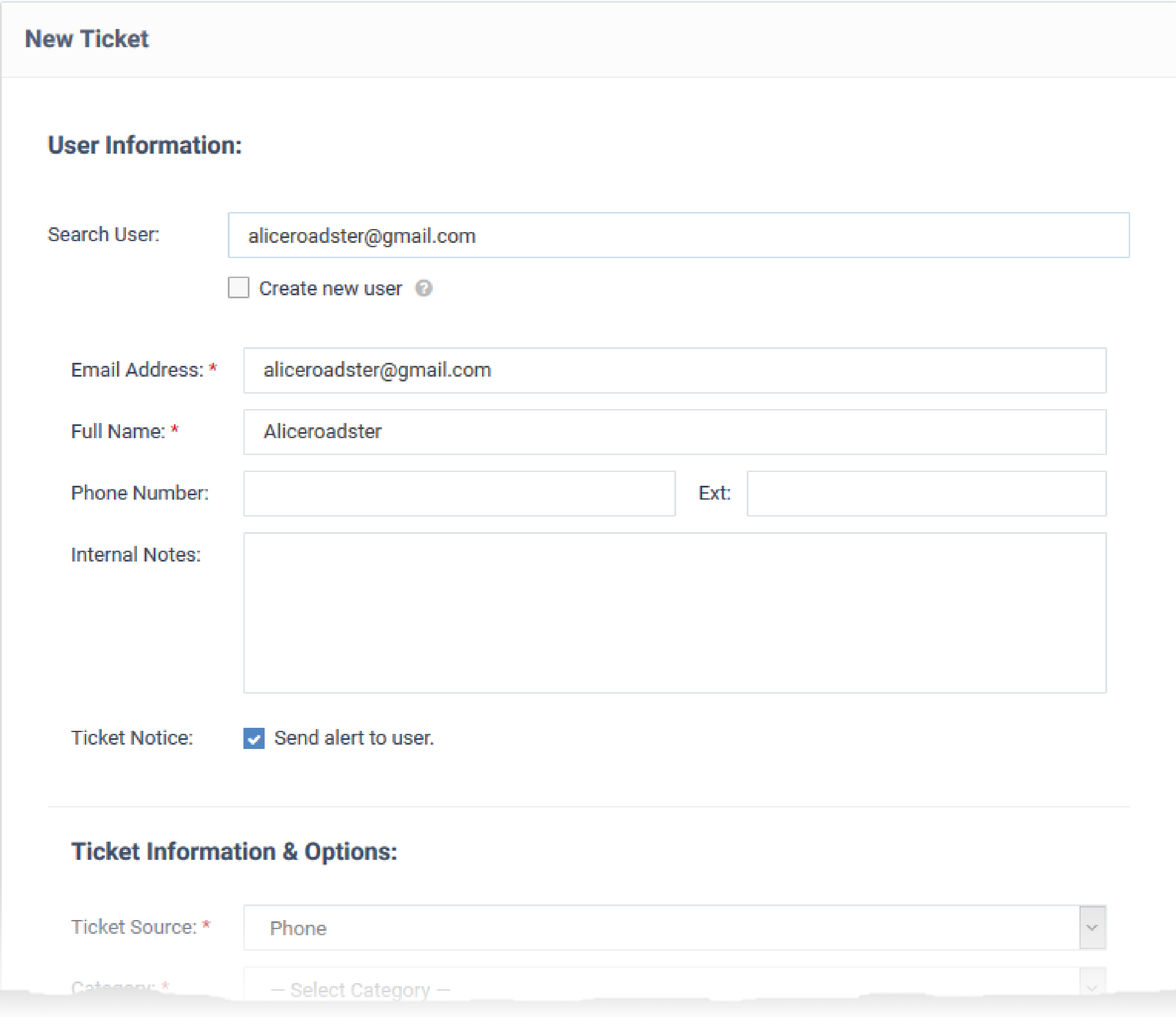
- Click 'Users' > 'User Directory'

- Click on the user for whom you want to create a ticket

- This opens the user details page:



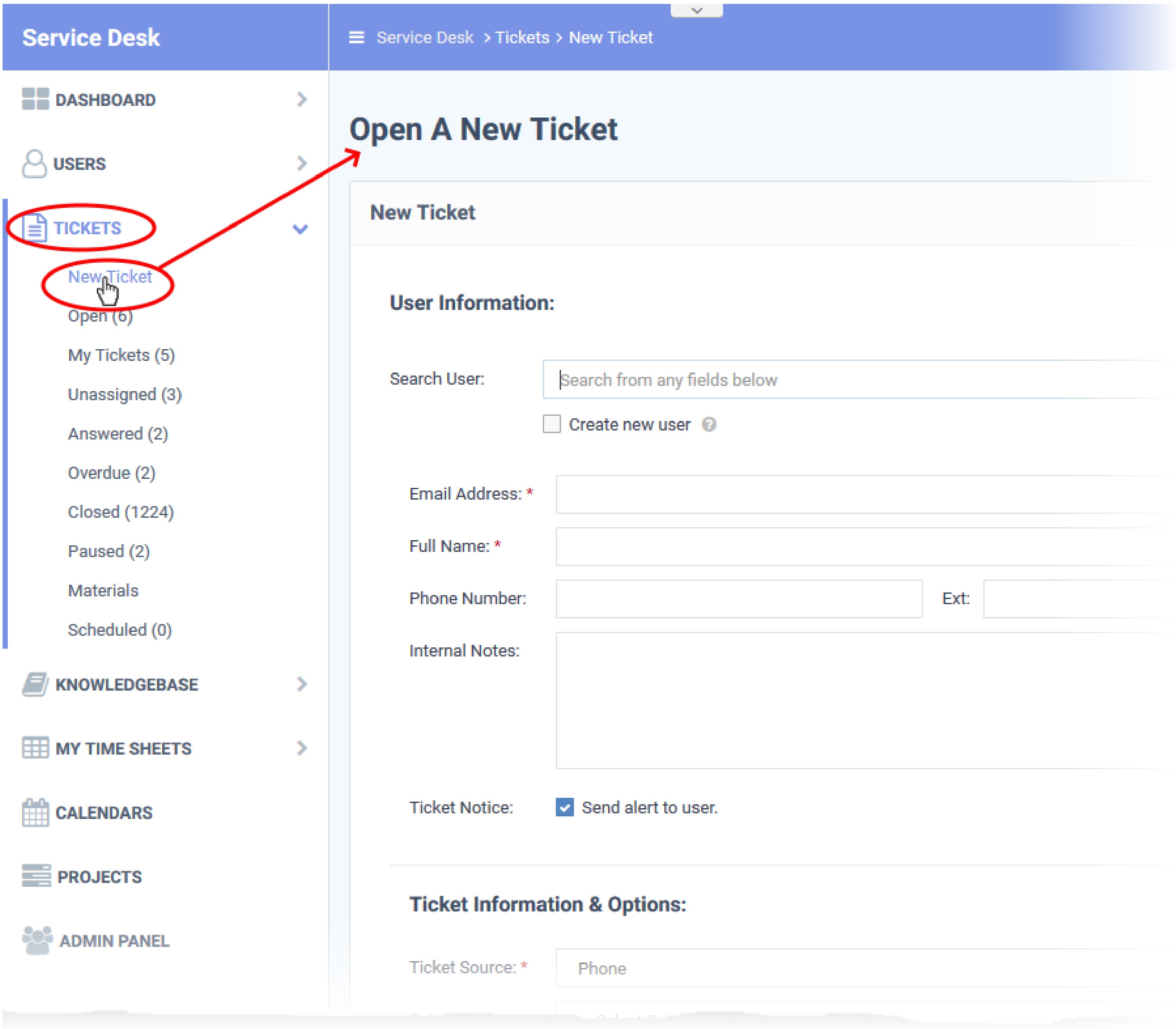
- Click 'Create ticket'
- The new ticket form opens:



Next: Ticket information and options

Create ticket for a new user from the 'Tickets' interface

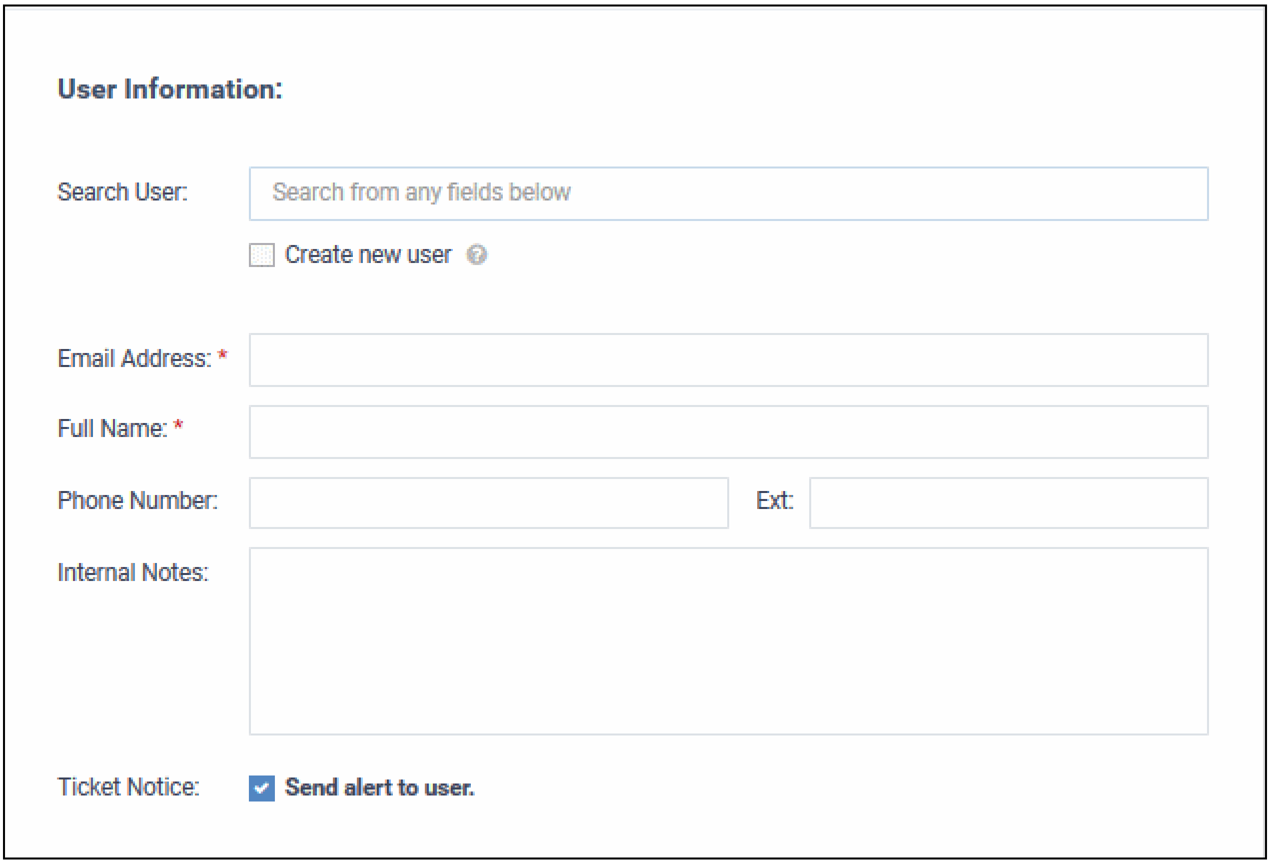
- Open the 'Staff' panel (see last link on the left)
- Click 'Tickets' then select 'New Ticket'



The new ticket form contains the following sections:

- User information - Details about the user on whose behalf of you are creating the ticket
- Ticket information and options - Ticket category, SLA plan, due date, assigned staff member, and more.
- Backdated ticket- Specify whether the work is already complete.
- Ticket details - Issue description, priority, asset type, and more
- Response - Initial reply sent to the user
- Internal note - Notes regarding the issue for internal reference

User Information



Search user - Create ticket for an existing user. Start typing their user name or email. Choose the user from the suggestions.

Create new user - Create a new user. The ticket will be associated with this new user.

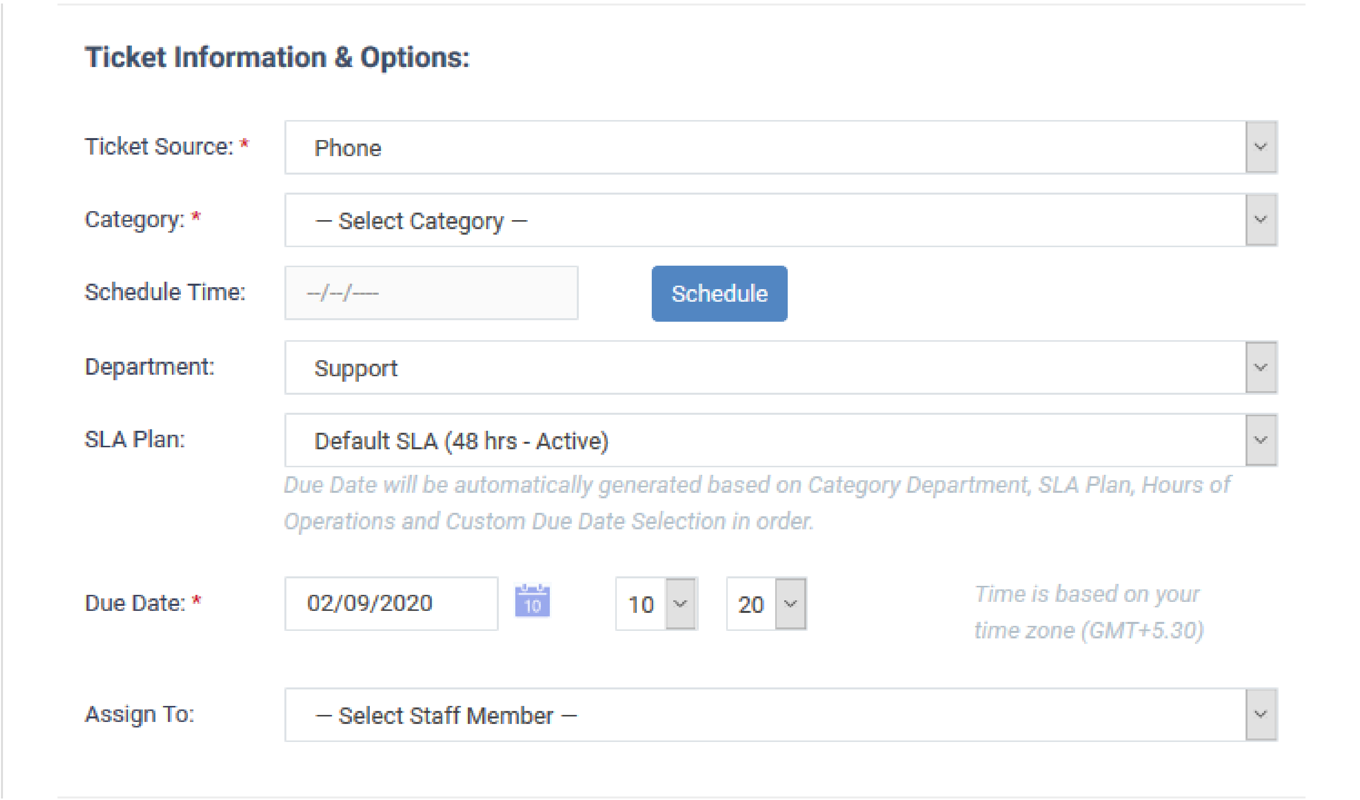
- Enter the email address, full name and phone number of the user. Add any notes about the user in the respective fields. The internal notes are only visible to admins/staff.

- New users are added as guests. You can associate users with customers in the 'User Directory' interface.

- See 'How to add, register and manage users in Service Desk' if you need help with this.

Ticket Notice - Sends an email to the user which informs them that the ticket has been created.

Ticket Information & Options



- **Ticket Source** - Select the channel through which you received the request from the user. The options are 'Phone', 'Email' and 'Other'.

- **Category** - Select the help topic under which the ticket falls. Some categories might add additional fields to the ticket in order to collect more information.

- **Schedule Time** - (Optional). Choose a date in the future when work on the ticket should begin. The schedule will be added to your calendar.

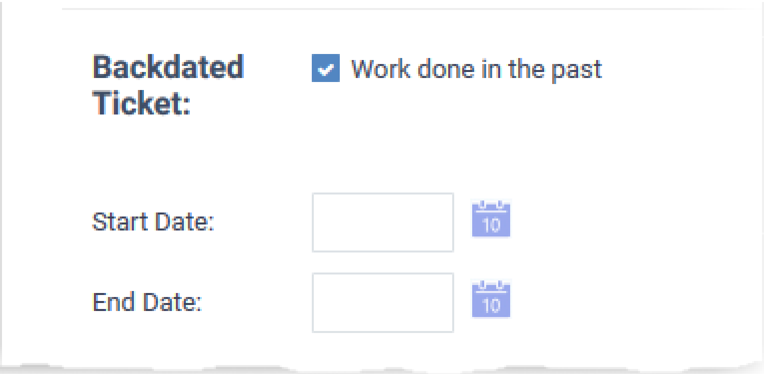
- **Department** - The department is auto-selected when you choose the ticket category. You can choose a different department if you want.

- **SLA Plan** - Service level plan associated with the ticket. This is determined by the ticket category. Use the drop-down menu to change the plan if required.

- **Due Date** - The date and time by which the ticket should be closed. A default due date is auto-generated based on the ticket category, department and SLA. You can change the date and time as required. This will override the date generated by default.

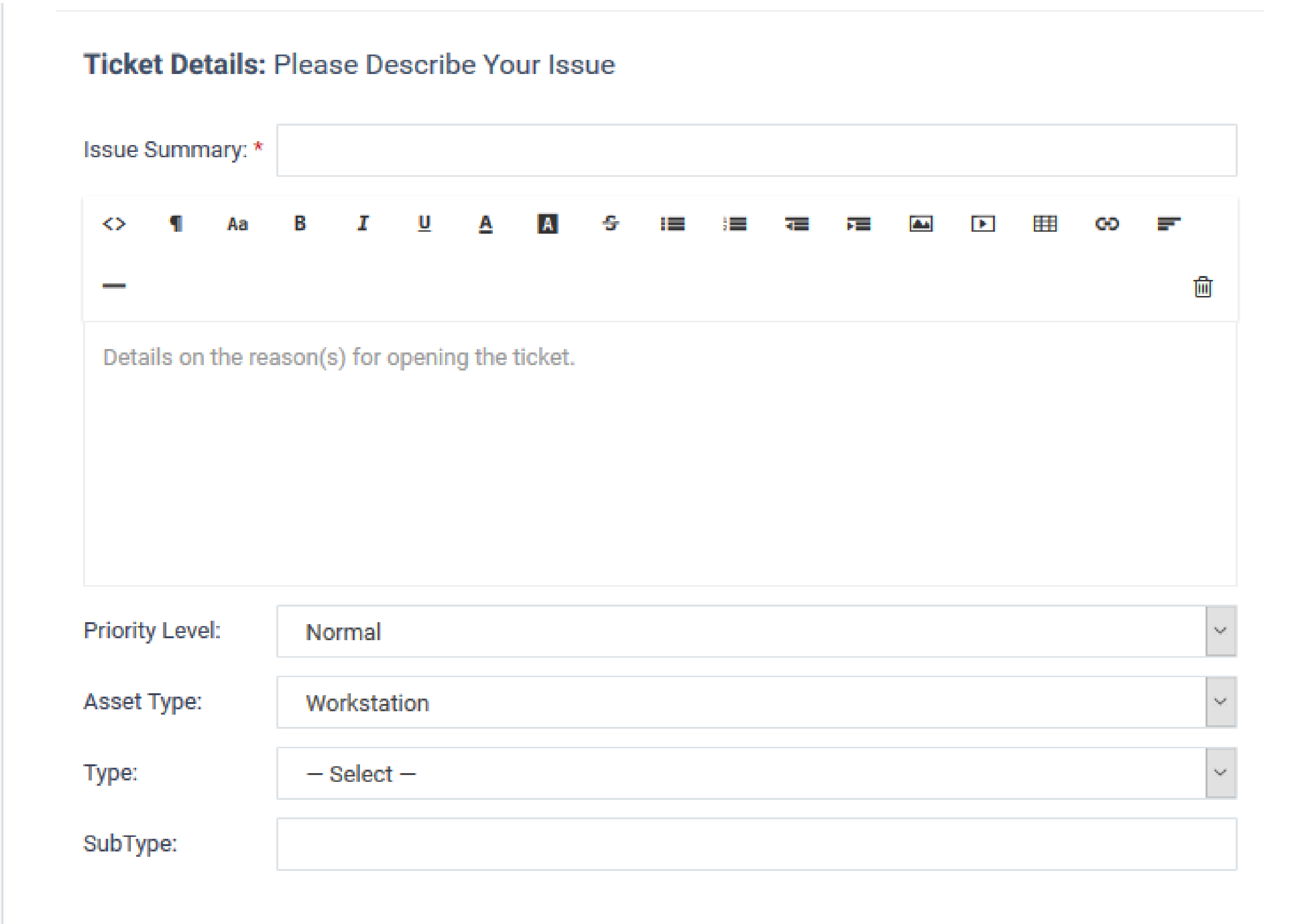
- **Assign to** - Choose the staff member to whom you want to assign the ticket. This assignee stands even if the 'Agent' for the category is different.

Backdated Ticket



- **Work done in the past** - Enable this if the ticket is for work that has already completed. The ticket is automatically given a status of 'Closed'.
    - Enter the task start and end dates in the spaces provided.
    - Make sure the end date is before the 'Due Date' entered elsewhere on the form.

Ticket Details



- **Issue Summary** - Create a one-line description of the issue.
- **Issue Details** - Enter a more detailed description of the issue.
- **Priority Level** - Ticket criticality. This is determined by the ticket category. Change the priority if

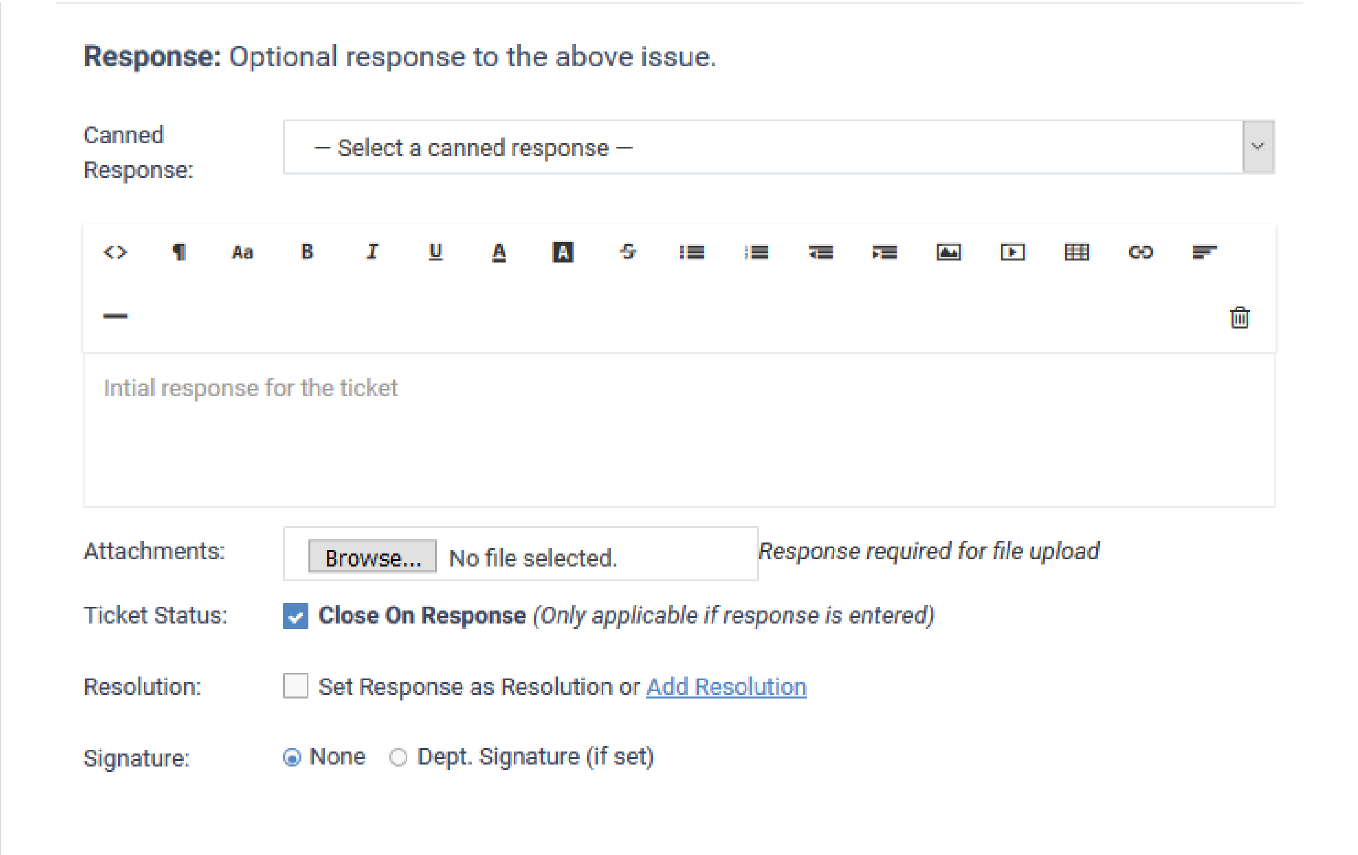
required.

- **Asset Type** - The type of item that the ticket concerns. For example, 'Workstation', 'Server', 'Printer', 'Mobile'.

- **Type** - The broad issue category. The options are 'Alert', 'Order' and 'Problem'.

- **Sub type** - Type a sub-set if you wish to further refine the 'Type'. Sub-types can be used to add more details about the category and asset type. For example, 'Overheating' may be a sub-category of a 'Problem' with a ‘Server’.

Response



- It is optional to create a response. Any response you specify is automatically sent to the user after you click 'Open'.

- **Canned Response**: Select if you want to send a pre-defined response to the ticket.

  Any canned responses you select are added to the 'Response' text field. You are free to edit and/or add text to complement the canned response.

  You can add multiple canned responses to build a more complete answer. For example, you might add the following 3 canned responses to a single response -
  'Acknowledgment', 'Ticket has been queued', 'Contact details'. Please enter a line space between each canned response for formatting reasons.

  - See How to manage canned responses in Service Desk for more details.

- **Attachments** - Click the 'Browse' button to add relevant attachments to the ticket.
- **Ticket Status** - If enabled, the ticket is closed immediately after saving. You must have entered a response for this to work (see the descriptions above).
- **Resolution**:
  - Enabled - The answer/response is considered as resolving the issue.

    Or
  - Click 'Add Resolution', if you want to specify a different resolution statement.
- **Signature**:
  - None - Means you can either send with no signature OR type a custom signature in the editor
  - ???'Dept. Signature' – Use the signature of the department to which the ticket is assigned.

Internal Note

- Enter comments, reminders and remarks to staff who might work on the ticket. Internal notes are only visible to admins/staff, and not to the user.
- Click 'Open' to create the ticket on behalf of a user.
- The ticket is added to the 'Tickets' interface. You or the staff member to whom the ticket is assigned can view/update the ticket by clicking the subject or ticket number.

Further reading:

How to view and take actions on a ticket