



VOC ACT & Close-the-Loop

Process example & Agent training

Sandsiv, October 2020

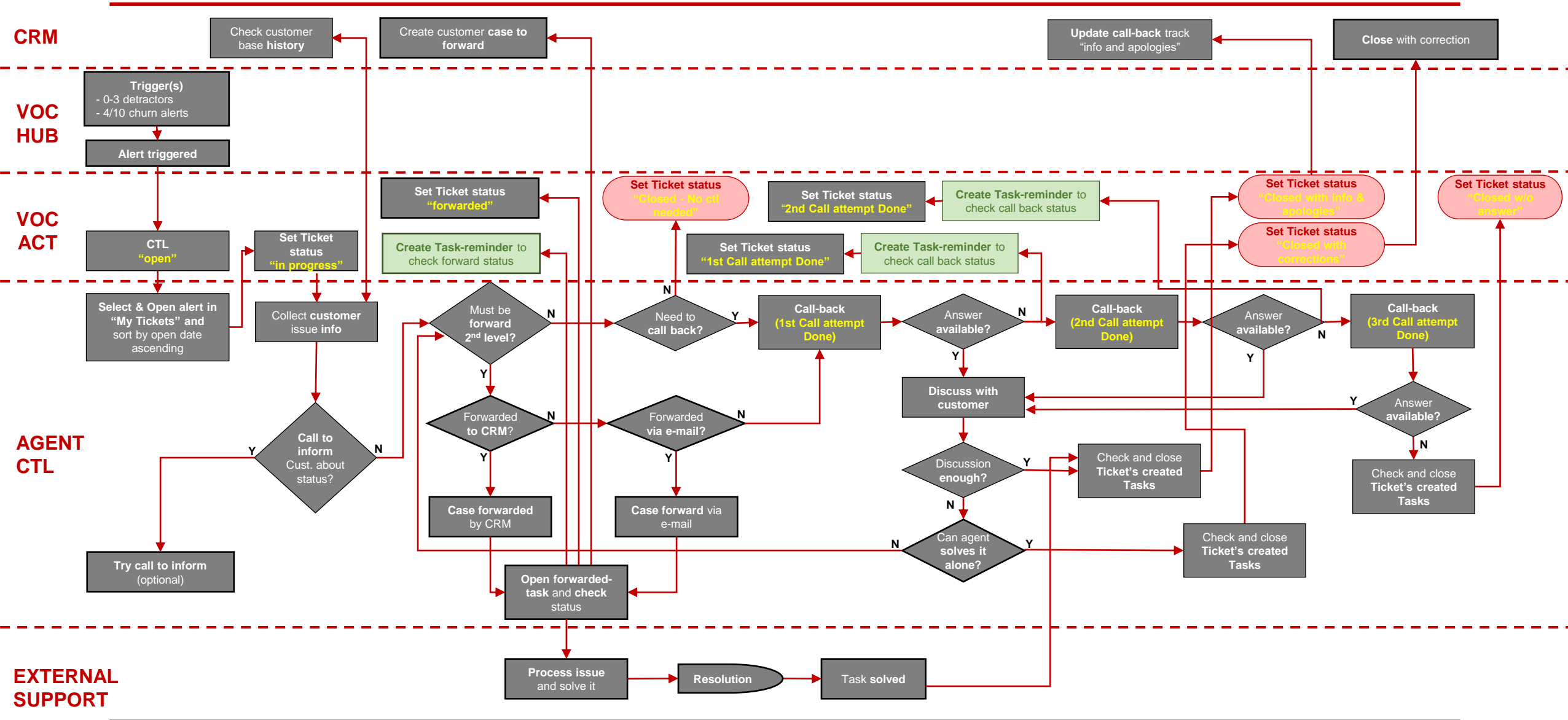
sandsiv+

INTRODUCTION

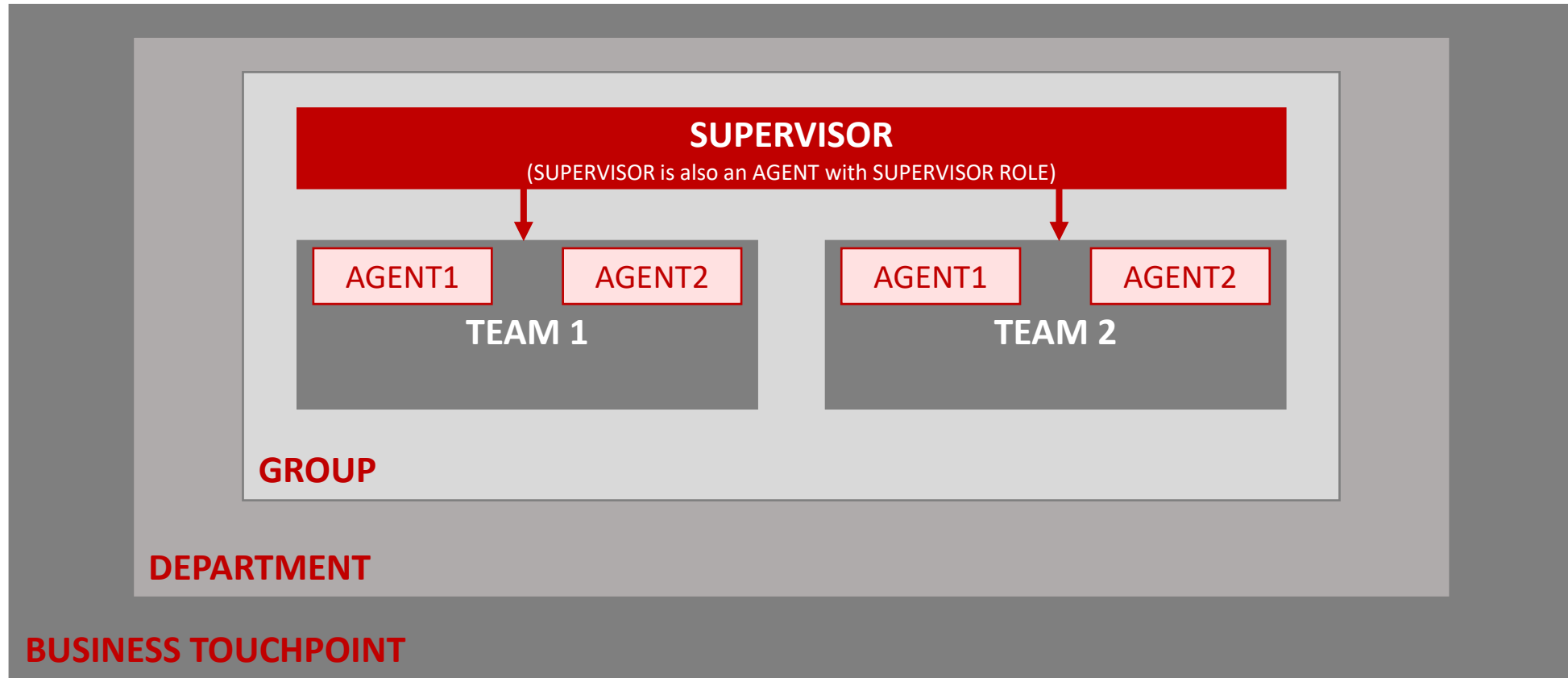
- Close-the-Loop process overview example
- Possible Hierarchy & Roles
- Repoll survey concept

VOC ACT

TNPS - Close-the-Loop process example



Group Roles & Hierarchy overview



Group Roles & Hierarchy overview

TITLE	DESCRIPTION	COMMENT
BUSINESS TOUCHPOINT	It is a contact point for the customer. (e.g. POS, Shop, Customer Service or Online)	One Business Touchpoint can but must not contain more departments (for example the DEPARTMENTS “Customer Service & Sales” + “Small Business Sales” are part of the BUSINESS TOUCHPOINT Customer Service).
DEPARTMENT	It contains multiple GROUPs which handle specific services (e.g. Field Force)	-
GROUP	a GROUP is part of a DEPARTMENT and contains multiple TEAMS (e.g. General Service Residential)	The GROUP is led by a SUPERVISOR
SUPERVISOR	A SUPERVISOR is responsible for more teams and he is therefore the member of one GROUP.	For example, in Austria the SUPERVISOR is monitoring the performance of his TEAMS and has no active role. To monitor the performance, he needs to see the number of open/closed etc. cases in a specific time for all his TEAMS. Remark: the SUPERVISOR can also be an AGENT with SUPERVISOR ROLE.
TEAM	A TEAM consists of approx. 10-30 employees which handle customer requests	-
AGENT	the AGENT is responsible for handling the tickets / cases for a specific TEAM and GROUP.	The AGENT is also responsible to handle the tickets of more TEAMS within his GROUP – if the GROUP contains more than 1 TEAM

Repoll Concept ,Rules & Information

REPOOL RULES (Group pre-defined process's rules)

CLOSED REASON	FLAG REPOOL	COMMENT
CLOSED – NO CTL NEEDED	Flag: <input type="checkbox"/>	NO-RE POLL survey
CLOSED WITH INFO & APOLOGIES	Flag: <input checked="" type="checkbox"/>	RE POLL survey IS TRIGGERED
CLOSED WITH CORRECTIONS	Flag: <input checked="" type="checkbox"/>	RE POLL survey IS TRIGGERED
CLOSED W/O ANSWER	Flag: <input type="checkbox"/>	NO-RE POLL survey



Information

- If “Send Repoll” is empty “= ” **NO Repoll is send** to the customer.
- If “Send Repoll” is checked “= ” **Repoll is send** to the customer.

By DEFAULT the system has “Send Repoll = ”, that means if no action is taken NO repoll is send to customer.

If the agent want to send a Repoll SMS he/she MUST manually set the “SEND REPOLL = ”.

AGENT ACTIVITIES

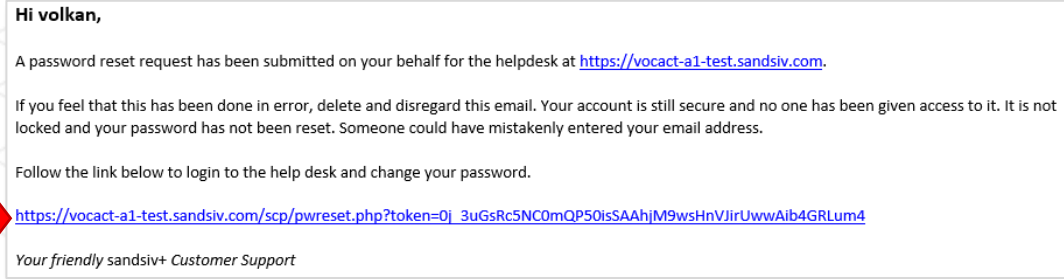
- Account creation
- Interface overview
- Ticket handling & statuses
- Task reminder
- Customer base management
- Filtering

AGENT ACTIVITIES

Account creation invitation mail & password reset



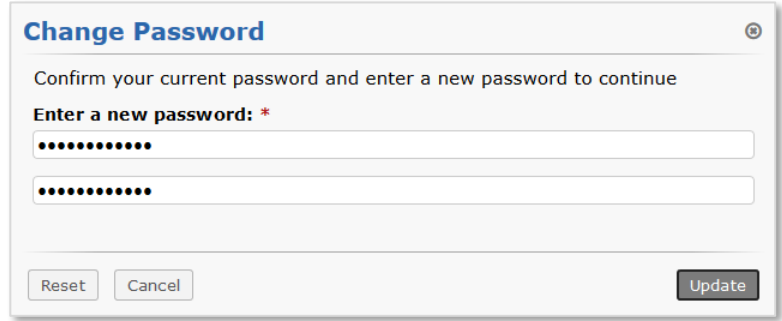
1. Open the invitation mail and start the password reset process by selecting the mentioned link



2. Enter your business mail address and push Login



3. Enter a new password and push Update



4. Welcome to your Team VOC ACT (CTL) tool (team tickets overview)

Training Address: <https://vocact-xx-test.sandsiv.com/scp/login.php>

Production Address: please ask to your Supervisor and/or Customer Experience responsible



AGENT ACTIVITIES

Interface overview

1. Go to your VOC ACT instance and login with your credential
Training Address: <https://vocact-xx-test.sandsiv.com/scp/login.php>
Production Address: please ask to your Supervisor and/or Customer Experience responsible

Which information do you see at glance?

Department Open tickets

My department(s) has right now **Open (4)** tickets which are not assigned to an agent.

Personal "My Tickets"

As agent I have 2 open tickets which need to be closed.

My Tickets

NUMBER	LAST UPDATED	SUBJECT
<input type="checkbox"/> 00000020	14/03/2019 16:22	Freddy Mercury Account is dis...
<input type="checkbox"/> 00000018	14/03/2019 15:46	The new brand phone of Mr...

Select: All None Toggle

Preview Ticket (push on Ticket's NUMBER)

Possibility to see different Ticket's information in a fast way.

Utilise this view to access directly the different Ticket's settings & options. (i.e. Thread, Reply, Assign, etc.)

Ticket #0000023: Cable signal at home doesn't work

Ticket Summary

Ticket State: Open — High
Created: 15/03/2019 15:30
Due Date: 16/03/2019 17:00

Assigned: — Unassigned —
To: —
From: Bob Marley Bob@Marley.com
Department: Support
Help Topic: Close The Loop - CTL

Thread (1) Reply Assign Transfer Post Note Edit Ticket

Overdue

In this moment our department has 3 overdue tickets. These tickets can be my (you find it again in "My ticket") OR of an other agent working in my department.

Overdue Tickets

NUMBER	DUE DATE	SUBJECT
<input type="checkbox"/> 00000018	14/03/2019 16:00	The new brand phone of Mr...
<input type="checkbox"/> 00000019	14/03/2019 16:00	Volkan is always annoying with th...
<input type="checkbox"/> 00000020	15/03/2019 10:00	Freddy Mercury Account is dis...

Select: All None Toggle

Tickets present in "My Tickets" - AND in "Overdue" view

NUMBER	LAST UPDATED	SUBJECT	FROM	PRIORITY	DEPARTMENT
<input type="checkbox"/> 00000015	14/03/2019 14:06	Customer does not have access on l...	Pippo Paperino	Emergency	Support
<input type="checkbox"/> 00000023	15/03/2019 15:30	Cable signal at home doesn't work	Bob Marley	High	Support
<input type="checkbox"/> 00000008	14/03/2019 16:02	Mobile phone is not working	Volkan Uzakgoeren	Normal	Support
<input type="checkbox"/> 00000017	14/03/2019 15:43	No account on My A1 Internet page	Volkan Uzakgoeren	Low	Support

Select: All None Toggle

Page: [1] Export

Showing 1 - 4 of 4

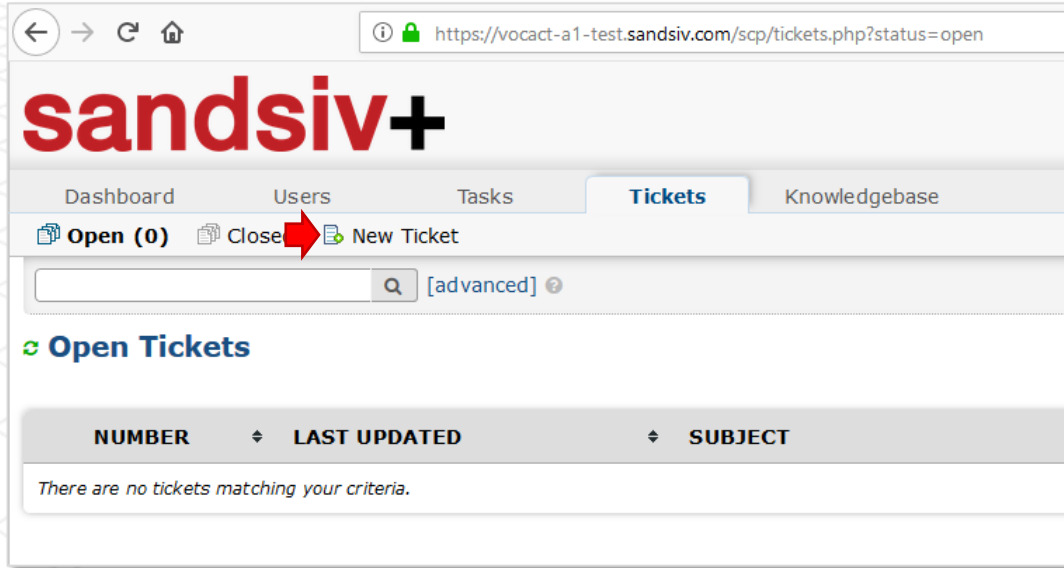
Priority

The ticket Priority level plays a role in the visualization of the tickets only.
Tickets with an higher priority are visualized at first in your list.

AGENT ACTIVITIES

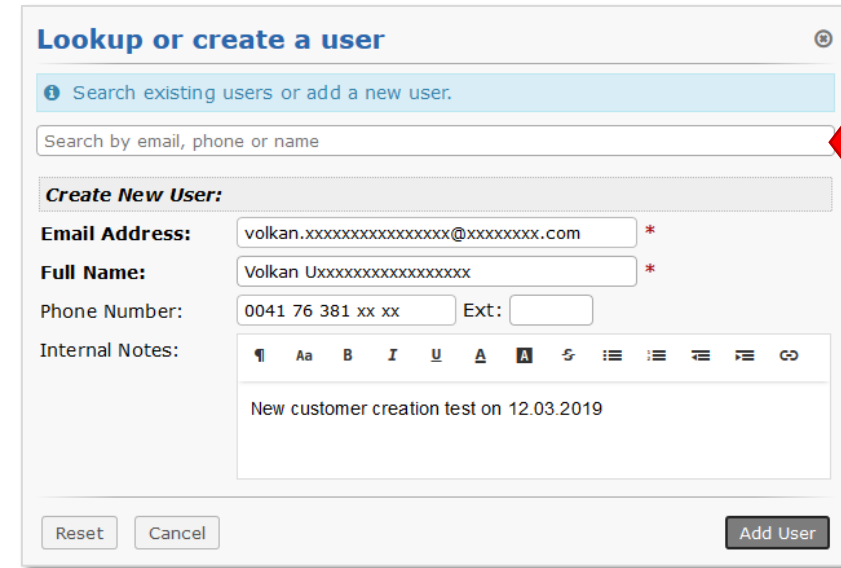
Manually ticket creation & new customer creation

1. Select "New Ticket"



The screenshot shows the SandSiv+ interface. The 'Tickets' tab is active, and the 'New Ticket' button is highlighted with a red arrow. The page displays a search bar and a table with columns for NUMBER, LAST UPDATED, and SUBJECT. The table is currently empty, with the message "There are no tickets matching your criteria."

2. Enter Customer (User) information and select **Add User**



The screenshot shows the 'Lookup or create a user' form. The 'Create New User' section is active, and the 'Add User' button is highlighted. The form contains fields for Email Address, Full Name, Phone Number, and Internal Notes. The 'Add User' button is highlighted with a red arrow.

Remark: if the Customer (User) is already in your customer base you can use the "search function"

AGENT ACTIVITIES

Manual ticket creation (1/2)

1. Complete the fields according your needs

The screenshot shows the 'Open a New Ticket' form in the SandSIV+ interface. The form is divided into several sections: 'User Information', 'Ticket Information and Options', 'Ticket Details', and 'Priority Level'. Red arrows point from text boxes on the right to specific fields in the form.

- User Information:** Points to the 'User' field, which contains 'Volkan Uzakgoeren <volkan.uzakgoeren@gmail.com>' and a 'Change' button.
- Ticket Source:** Points to the 'Ticket Source' dropdown menu, which is set to 'Phone'.
- Help Topic:** Points to the 'Help Topic' dropdown menu, which is set to 'Close The Loop - CTL'.
- Department:** Points to the 'Department' dropdown menu, which is set to 'Support'.
- SLA Plan:** Points to the 'SLA Plan' dropdown menu, which is set to 'Default SLA (48 hours - Active)'.
- Due Date:** Points to the 'Due Date' field, which is set to '15/03/2019' and '17:00'.
- Assign To:** Points to the 'Assign To' dropdown menu, which is set to '— Select an Agent OR a Team —'.
- Ticket Details:** Points to the 'Issue Summary' field, which contains 'Phone is not working' and a text area with the description 'Customer arrived to our shop and his phone was not working'.
- Priority Level:** Points to the 'Priority Level' dropdown menu, which is set to 'Normal'.
- Send Repoll:** Points to the 'Send Repoll' checkbox, which is unchecked.

User Information: check customer (user) information for correctness and/or Change them if needed

Ticket source: Phone, Email or Other

Help Topic: Group default is Close The Loop - CTL

Department: please select the department where the ticket has to be address to

SLA Plan: Default SLA (48 hours – Active)

Remark: since during this “simulation” I’m working in the Support I decide to assign the ticket to the Support department

Due date & time definition if needed

Assign the ticket to a Team or an Agent within your Department (reference to “Group Roles & Hierarchy overview”

Remark: if no selection is done the ticket is assigned to your team (team tickets overview)

Describe customer issue with an adequate Issue Summary (Title) and text. Attached file(s) if needed.

Priority Level: Low, Normal, High or Emergency

Repoll Option: please refer to slide 6 “Repoll Concept ,Rules & Information (Group directives)”

AGENT ACTIVITIES

Manual ticket creation (2/2)

1. Complete the fields according your needs

Response: *Optional response to the above issue.*

Canned Response: Append

Initial response for the ticket

Drop files here or choose them

Ticket Status:

Signature: None Department Signature (if set)

Internal Note

Optional internal note (recommended on assignment)

Open Reset Cancel

Canned Response settings and message possibility. If no selection is done even with ticked box the customer will NOT receive any canned mail.

Ticket Status according Group CTL Process statuses (New Ticket = Open)

Signature: create and apply your Department Signature (if set)

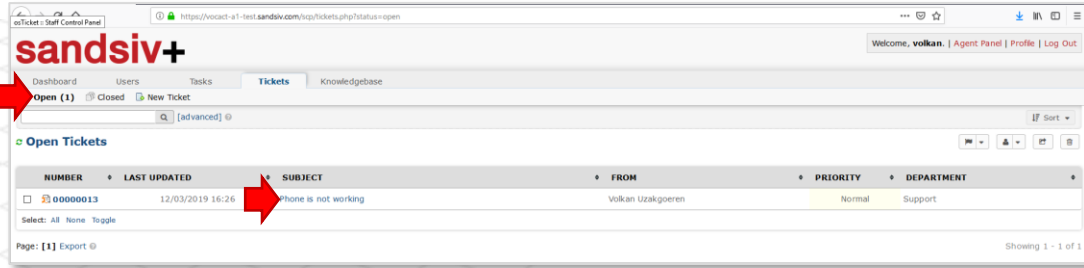
Internal Note recommended in case of assignment to an other agent or team

2. Acknowledge the ticket creation by pushing **Open**

AGENT ACTIVITIES

Manual ticket creation confirmation & Assignment to an Agent

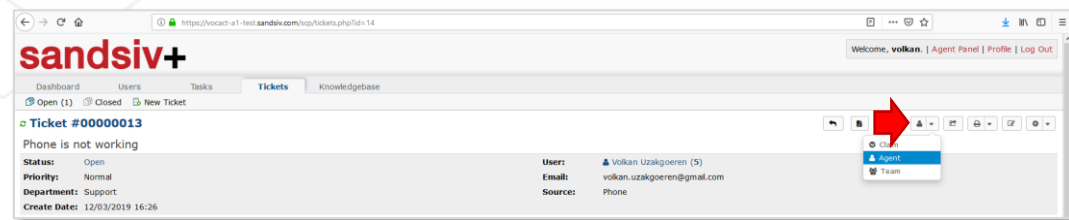
1. Select "Open" to see all YOUR Department open tickets and select the Subject to open it



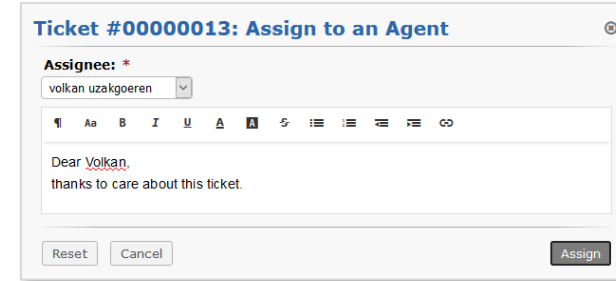
2. Open the ticket & assign it to an Agent or to a Team

Remark: **Claim** is an auto-assignment function, it directly assigns the ticket to yourself (My Tickets).

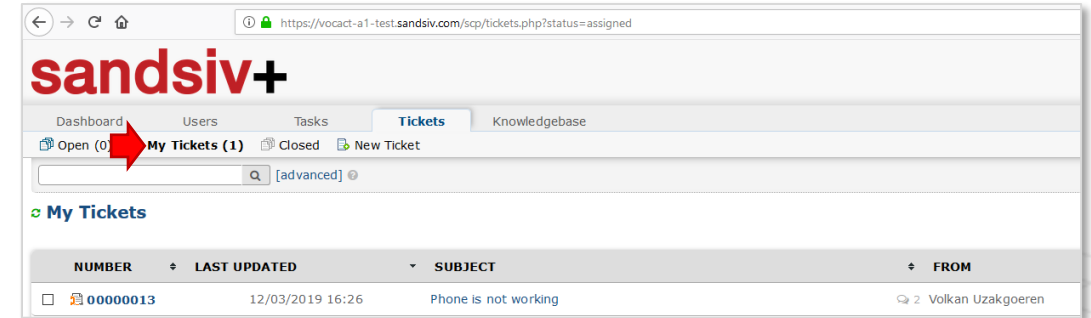
Transfer offers you the possibility to assign the ticket to another Department.



3. Add a comment and acknowledge the ticket assignment by pushing **Assign**



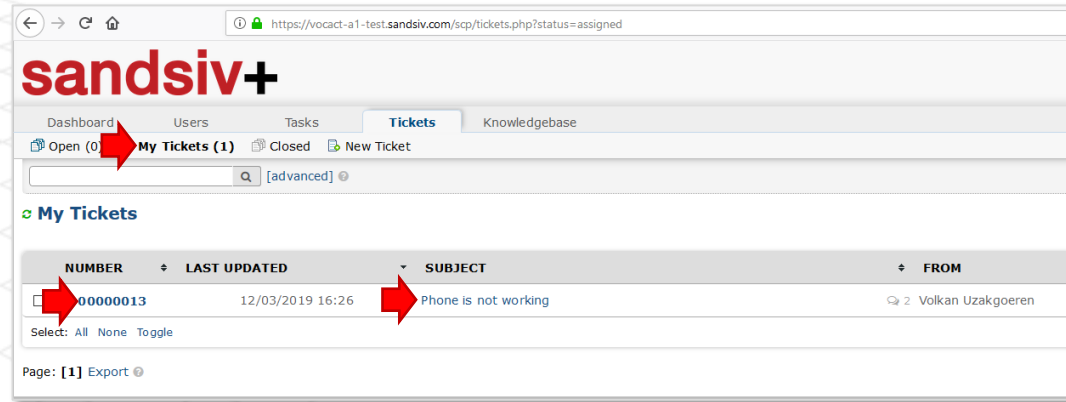
4. Ticket appears now in the personal "My Tickets" box of the agent you assigned the ticket



AGENT ACTIVITIES

Personal tickets “My Tickets”

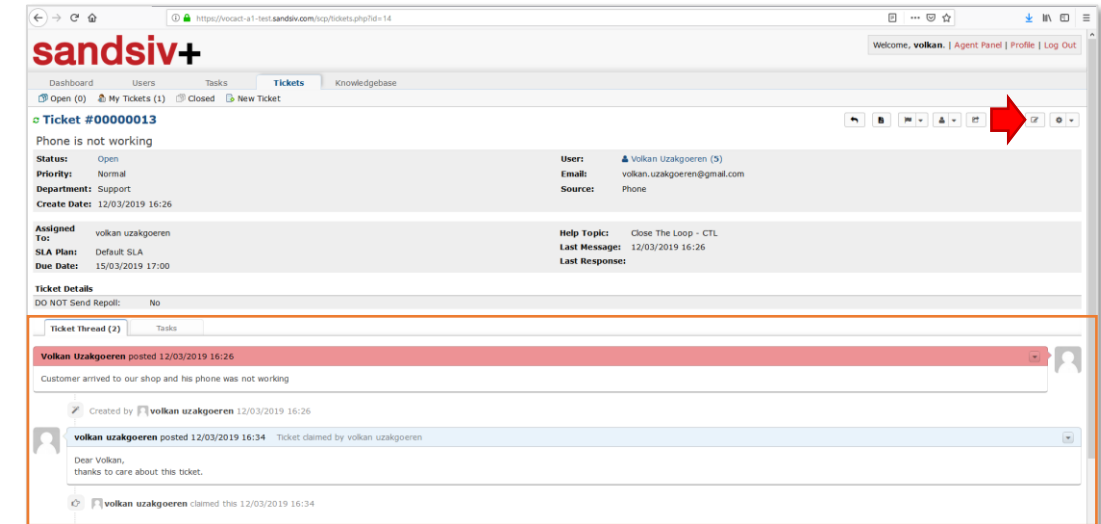
1. Select “My Tickets” to see your personal assigned tickets and open the assigned ticket by selecting the NUMBER or SUBJECT



NUMBER	LAST UPDATED	SUBJECT	FROM
00000013	12/03/2019 16:26	Phone is not working	2 Volkan Uzakgoeren

2. Open the assigned ticket and start the “Tactical” TNPS Loop Process exercise (next page)

Remark: if you need to change some of the ticket information/settings (incl. RE POLL OPTION) you can **Edit the ticket** in any moment



Ticket #00000013

Phone is not working

Status: Open

Priority: Normal

Department: Support

Create Date: 12/03/2019 16:26

User: Volkan Uzakgoeren (3)

Email: volkan.uzakgoeren@gmail.com

Source: Phone

Assigned To: volkan uzakgoeren

SLA Plan: Default SLA

Due Date: 15/03/2019 17:00

Help Topic: Close The Loop - CTL

Last Message: 12/03/2019 16:26

Last Response:

Ticket Details

DO NOT Send Repoll: No

Ticket Thread (2)

Volkan Uzakgoeren posted 12/03/2019 16:26

Customer arrived to our shop and his phone was not working

Created by volkan uzakgoeren 12/03/2019 16:26

volkan uzakgoeren posted 12/03/2019 16:34 Ticket darned by volkan uzakgoeren

Dear Volkan,
thanks to care about this ticket.

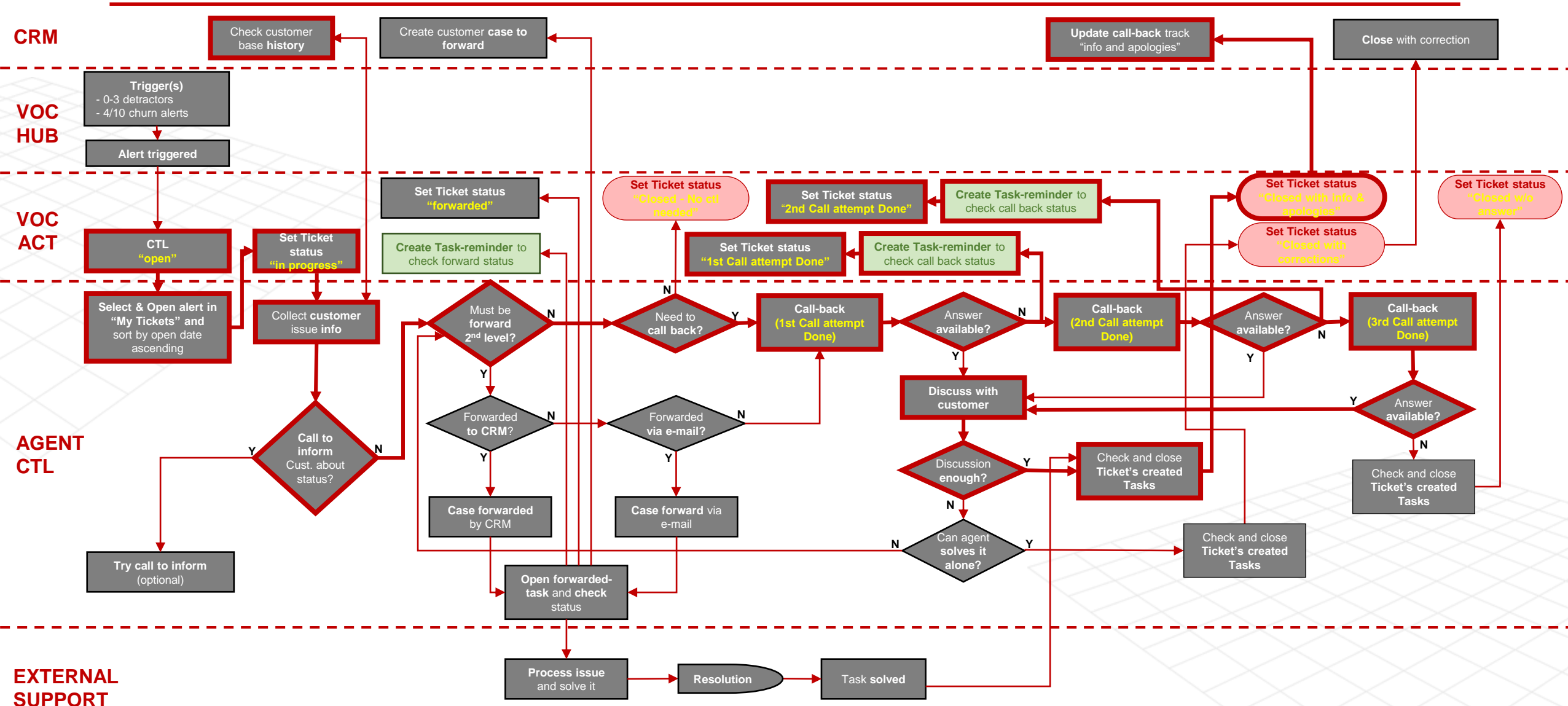
volkan uzakgoeren claimed this 12/03/2019 16:34

Ticket history panel (Thread)

In this section (Ticket Thread) you can see the whole history of the ticket.
(i.e. opening, Assignment, Tasks & Actions, Status changes Overdue time, etc.)

VOC ACT

“Tactical” TNPS Close-the-Loop Process exercise



AGENT ACTIVITIES

Open Ticket in “My Tickets” & set Ticket status to “In Progress”

1. Open the assigned Ticket in “My Tickets” and start the “Tactical” TNPS Loop Process

The screenshot shows the SandSIV+ interface for ticket #00000013. The ticket title is "Phone is not working". The status is "Open". The user is Volkan Uzakgoeren (5). The priority is Normal, the department is Support, and the source is Phone. The create date is 12/03/2019 16:26. The assigned to is volkan uzakgoeren, the help topic is "Close The Loop - CTL", the last message is 12/03/2019 16:26, and the last response is 15/03/2019 17:00. The ticket details section shows "DO NOT Send Repoll: No". The ticket thread shows a post by Volkan Uzakgoeren at 12/03/2019 16:26 with the text "Customer arrived to our shop and his phone was not working". Below this, it shows the ticket was created by volkan uzakgoeren at 12/03/2019 16:26 and then claimed by volkan uzakgoeren at 12/03/2019 16:34. A message from volkan uzakgoeren to Volkan says "Dear Volkan, thanks to care about this ticket." and it was claimed at 12/03/2019 16:34.

2. Change Ticket status to “In Progress”

The screenshot shows the SandSIV+ interface for ticket #00000013. The ticket title is "Phone is not working". The status is "Open". The user is Volkan Uzakgoeren (5). The priority is Normal, the department is Support, and the source is Phone. The create date is 12/03/2019 16:26. The assigned to is volkan uzakgoeren, the help topic is "Close The Loop - CTL", the last message is 12/03/2019 16:26, and the last response is 15/03/2019 17:00. The ticket details section shows "DO NOT Send Repoll: No". The ticket thread shows a post by Volkan Uzakgoeren at 12/03/2019 16:26 with the text "Customer arrived to our shop and his phone was not working". Below this, it shows the ticket was created by volkan uzakgoeren at 12/03/2019 16:26 and then claimed by volkan uzakgoeren at 12/03/2019 16:34. A message from volkan uzakgoeren to Volkan says "Dear Volkan, thanks to care about this ticket." and it was claimed at 12/03/2019 16:34. The status dropdown menu is open, showing options: In Progress, Forwarded, 1st Call attemp. Done, 2nd Call attemp. Done, 3rd Call attemp. Done, Closed - No CTL needed, Closed - with info & apologies, Closed - with correction, Closed - w/o answers, and Closed.

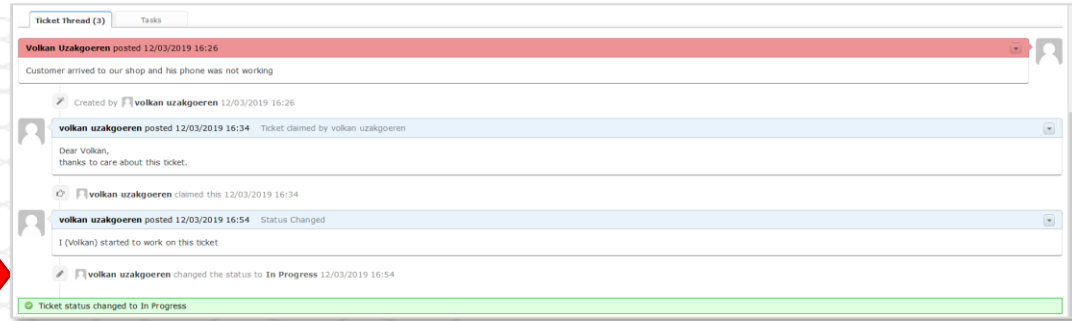
3. Give an appropriate message and save with **Open**

The screenshot shows the "Open Ticket #00000013" dialog box. The status is set to "In Progress". The message text is "I (Volkan) started to work on this ticket". The dialog box has "Reset", "Cancel", and "Open" buttons.

AGENT ACTIVITIES

Execute 1st call (no answer available) & Create Task-reminder

1. Check status change in your Ticket history panel



2. Check customer base history in your **CRM system** and collect customer issue information

3. Call to inform Customer about status => **NO**

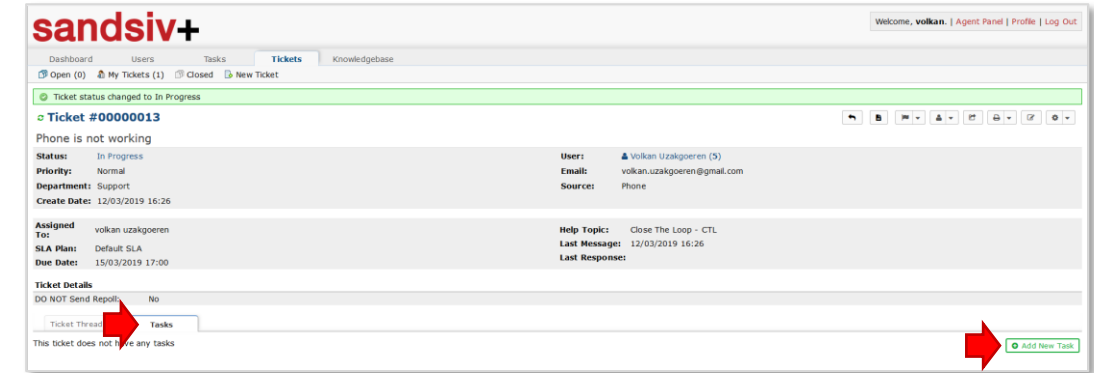
4. Must be forward 2nd level (by CRM) => **NO**

5. Need to call back => **YES**

6. Call-back the customer (1st Call attempt done)

7. Answer available => **NO**

8. Open "Tasks" tab and create your Ticket Task-reminder. Select **Add New Task**



AGENT ACTIVITIES

Create Task-reminder & Set Ticket status to “1st Call attempt Done”

1. Complete needed fields and select **Create Task**

Ticket #0000013: Add New Task

Please Describe The Issue

Title: *
Call back customer (Task-reminder)

Description: *
Customer called (1st attempt) but NO answer available.
Therefore I create this "Task-reminder".

Drop files here or choose them

Task Visibility & Assignment

Department: * Support **Assignee:** volkan uzakgoeren

Due Date: 16/03/2019 16:45 (CET)

Reset Cancel **Create Task**

Task Visibility & Assignment

Possibility to assign the ticket to an other Department and/or Agent and to define the Due Date of the ticket.

2. The new created Task appears now in the ticket “Tasks” list

Ticket Thread (3) **Tasks**

All Tasks (1) / Task #6

Call back customer (Task-reminder)

volkan uzakgoeren posted 12/03/2019 17:02

Customer called (1st attempt) but NO answer available.
Therefore I create this "Task-reminder".

Created by volkan uzakgoeren 12/03/2019 17:02

volkan uzakgoeren claimed this 12/03/2019 17:02

3. Change Ticket status to “1st Call attempt Done”

Ticket #0000013

Phone is not working

Status: In Progress **User:** Volkan Uzakgoeren (5)

Priority: Normal **Email:** volkan.uzakgoeren@gmail.com

Department: Support **Source:** Phone

Create Date: 12/03/2019 16:26

Assigned To: volkan uzakgoeren **Help Topic:** Close The Loop - CTL

SLA Plan: Default SLA **Last Message:** 12/03/2019 16:26

Due Date: 15/03/2019 17:00 **Last Response:**

- Open
- Forwarded
- 1st Call attempt Done**
- 2nd Call attempt Done
- 3rd Call attempt Done
- Closed - No CTL needed
- Closed - with info & apologies
- Closed - with correction
- Closed - w/o answers
- Closed

4. Give an appropriate message and save with **Open**

Open Ticket #0000013

Status: 1st Call attempt Done *

I (Volkan) called the customer a 1st time but NO abswer.

Reset Cancel **Open**

AGENT ACTIVITIES

2nd Call attempt & new Task-reminder creation

1. Check status change & message in your Ticket history panel

Ticket Thread (4) Tasks (1)

Volkan Uzakgoeren posted 12/03/2019 16:26
Customer arrived to our shop and his phone was not working

Created by **volkan uzakgoeren** 12/03/2019 16:26

volkan uzakgoeren posted 12/03/2019 16:34 Ticket claimed by volkan uzakgoeren
Dear Volkan,
thanks to care about this ticket.

volkan uzakgoeren claimed this 12/03/2019 16:34

volkan uzakgoeren posted 12/03/2019 16:54 Status Changed
I (Volkan) started to work on this ticket

volkan uzakgoeren changed the status to **In Progress** 12/03/2019 16:54

volkan uzakgoeren posted 12/03/2019 17:08 Status Changed
I (Volkan) called the customer a 1st time but NO answer.

volkan uzakgoeren changed the status to **1st Call attempt Done** 12/03/2019 17:08

Ticket status changed to **1st Call attempt Done** 12/03/2019 17:08

2. Call-back the customer (2nd Call attempt done)

3. Answer available => NO

4. Open "Tasks" tab and create your Ticket Task-reminder. Select **Add New Task**

sandsiv+ Welcome, volkan. | Agent Panel | Profile | Log Out

Dashboard Users Tasks Tickets Knowledgebase

Open (0) My Tickets (1) Closed New Ticket

Ticket status changed to **1st Call attempt Done**

Ticket #00000013

Phone is not working

Status: 1st Call attempt Done User: **Volkan Uzakgoeren** (5)
Priority: Normal Email: volkan.uzakgoeren@gmail.com
Department: Support Source: Phone
Create Date: 12/03/2019 16:26

Assigned To: volkan uzakgoeren Help Topic: Close The Loop - CTL
SLA Plan: Default SLA Last Message: 12/03/2019 16:26
Due Date: 15/03/2019 17:00 Last Response:

Ticket Details
DO NOT Send Report: No

Ticket Thread Tasks (1)

Showing 1 - 1 of 1 task

Add New Task Options

NUMBER	DATE	STATUS	TITLE	DEPARTMENT	ASSIGNEE
6	12/03/2019 17:02	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren

AGENT ACTIVITIES

New Task-reminder creation & Set Ticket status to “2nd Call attempt Done”

1. Complete needed fields and select **Create Task**

Ticket #0000013: Add New Task

Please Describe The Issue

Title: *
Call back customer (Task-reminder)

Description: *
Customer called 2nd time but NO answer available.
Therefore I create this "Task-reminder" for the 3rd call attempt.

Drop files here or choose them

Task Visibility & Assignment

Department: * Support **Assignee:** volkan uzakgoeren

Due Date: 16/03/2019 17:00 (CET)

Reset Cancel **Create Task**

Task Visibility & Assignment

Possibility to assign the ticket to a other Department and/or Agent and to define the Due Date of the ticket.

2. The new created Task appears now in the ticket “Tasks” list

Ticket Thread (1) Tasks (2)

Showing 1 - 2 of 2 tasks

NUMBER	DATE	STATUS	TITLE	DEPARTMENT	ASSIGNEE
7	12/03/2019 17:15	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren
6	12/03/2019 17:02	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren

3. Change Ticket status to “2nd Call attempt Done”

Ticket #0000013

Phone is not working

Status: 1st Call attempt Done

Priority: Normal

Department: Support

Create Date: 12/03/2019 16:26

Assigned To: volkan uzakgoeren

SLA Plan: Default SLA

Due Date: 15/03/2019 17:00

User: Volkan Uzakgoeren (5)

Email: volkan.uzakgoeren@gmail.com

Source: Phone

Help Topic: Close The Loop - CTL

Last Message: 12/03/2019 16:26

Last Response:

Open
In Progress
Forwarded
2nd Call attempt Done
3rd Call attempt Done
Closed - No CTL needed
Closed - with info & apologies
Closed - with correction
Closed - w/o answers
Closed

4. Give an appropriate message and **save with Open**

Open Ticket #0000013

Status: 2nd Call attempt Done *

I (Volkan) called the customer a 2nd time but NO answer

Reset Cancel **Open**

AGENT ACTIVITIES

3rd Call attempt, Discussion with customer & Close Ticket's created Tasks

1. Check status change in your Ticket history panel

Ticket Thread (5) Tasks (2)

volkan uzakgoeren posted 12/03/2019 16:26
Customer arrived to our shop and his phone was not working

Created by volkan uzakgoeren 12/03/2019 16:26
Ticket claimed by volkan uzakgoeren

volkan uzakgoeren posted 12/03/2019 16:34
Dear Volkan,
thanks to care about this ticket.

volkan uzakgoeren claimed this 12/03/2019 16:34

volkan uzakgoeren posted 12/03/2019 16:54
Status Changed
1 (volkan) started to work on this ticket

volkan uzakgoeren changed the status to In Progress 12/03/2019 16:54

volkan uzakgoeren posted 12/03/2019 17:08
Status Changed
1 (volkan) called the customer a 1st time but NO answer.

volkan uzakgoeren changed the status to 1st Call attempt Done 12/03/2019 17:08

volkan uzakgoeren posted 12/03/2019 17:25
Status Changed
1 (volkan) called the customer a 2nd time but NO answer

volkan uzakgoeren changed the status to 2nd Call attempt Done 12/03/2019 17:25

2. Call-back the customer (3rd Call attempt done)

3. Answer available => YES

4 Discuss with customer

5. Discussion enough => YES

6. Open Tasks tab

7. Select open Tasks

8. Set Task's status on Close

Ticket Thread (5) Tasks (2)

Showing 1 - 2 of 2 tasks

NUMBER	DATE	STATUS	TITLE	DEPARTMENT	ASSIGNEE		
<input checked="" type="checkbox"/>	7	12/03/2019 17:15	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren	Reopen
<input checked="" type="checkbox"/>	6	12/03/2019 17:02	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren	Close

Close
Claim
Assign to Agent
Assign to Team
Transfer
Delete

AGENT ACTIVITIES

Close Ticket's Task-reminders & Set Ticket status to "Closed-with info & apologies"

1. Set Task's status on Close

NUMBER	DATE	STATUS	TITLE	DEPARTMENT	ASSIGNEE
7	12/03/2019 17:15	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren
6	12/03/2019 17:02	open	Call back customer (Task-reminder)	Support	volkan uzakgoeren

2. Give an appropriate reason for closing the Ticket's Tasks and select **Submit**

Are you sure you want to CLOSE selected tasks?

I was able to speak with the customer and I solved the issue

Reset Cancel **Submit**

3. Ticket's Tasks Status change to "closed"

NUMBER	DATE	STATUS	TITLE	DEPARTMENT	ASSIGNEE
7	12/03/2019 17:15	closed	Call back customer (Task-reminder) (2)	Support	volkan uzakgoeren
6	12/03/2019 17:02	closed	Call back customer (Task-reminder) (2)	Support	volkan uzakgoeren

4. Change Ticket status to "Closed – with info & apologies"

sandsiv+

Dashboard Users Tasks **Tickets** Knowledgebase

Open (0) My Tickets (1) Closed New Ticket

Ticket #00000013

Phone is not working

Status: 2nd Call attempt Done

Priority: Normal

Department: Support

Create Date: 12/03/2019 16:26

Assigned To: volkan uzakgoeren

SLA Plan: Default SLA

Due Date: 15/03/2019 17:00

User: volkan uzakgoeren (5)

Email: volkan.uzakgoeren@gmail.com

Source: Phone

Help Topic: Close The Loop - CTL

Last Message: 12/03/2019 16:26

Last Response:

- Open
- In Progress
- Forwarded
- 1st Call attempt Done
- 3rd Call attempt Done
- ⚪ Closed - No CTL needed
- 🔵 **Close with info & apologies**
- 🟢 Closed - with connection
- 🟡 Closed - w/o answers
- 🟠 Closed

5. Give an appropriate last message before closing the Ticket and select **Close**

Close Ticket #00000013

Status: Closed - with info & apologies *

This ticket can be closed successfully and the customer is now happy ;)

Reset Cancel **Close**

6. Ticket status changes and the amount in "My Tickets" decreases/disappears from your User Interface

sandsiv+

Welcome, volkan. | Agent Panel | Profile | Log Out

Dashboard Users Tasks **Tickets** Knowledgebase

Open (0) Closed New Ticket

Ticket #00000013 status changed to Closed - with info & apologies

My Tickets

There are no tickets matching your criteria.

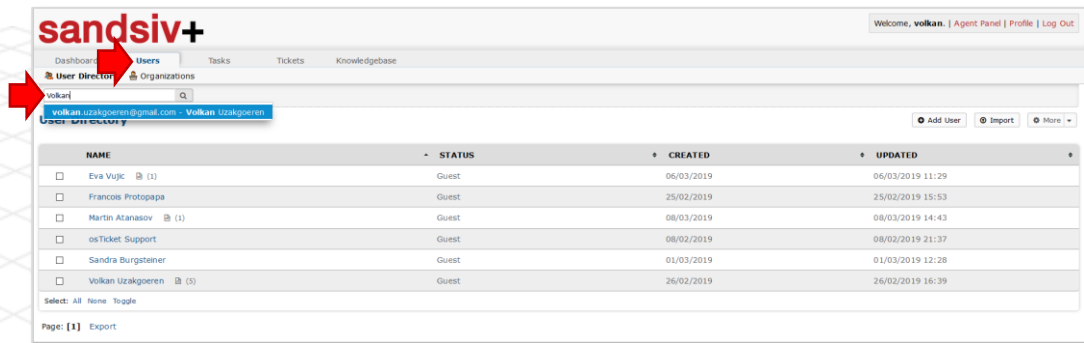
7. Update call-back track "info & apologies" in your **CRM system**

Compliment! Your Ticket is solved and the "Tactical" TNPS Loop Process closed successfully!

AGENT ACTIVITIES

Customers (Users) base management

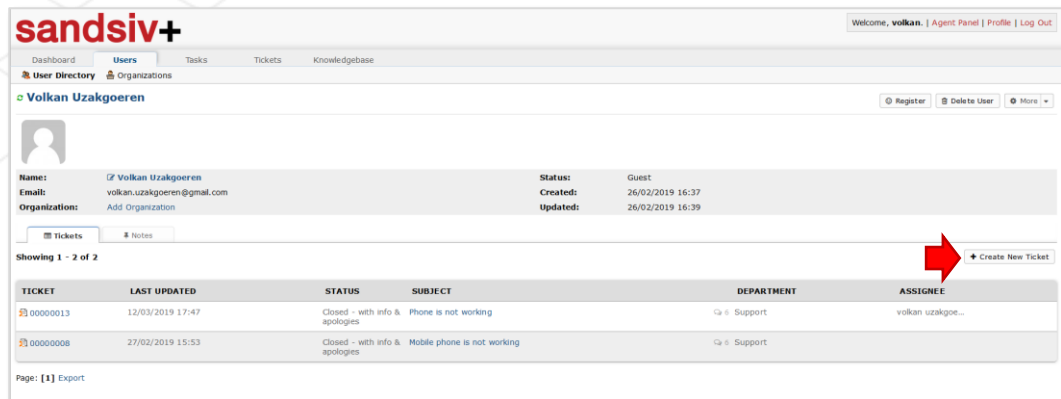
1. Select **Users** and use the **Search** function to find an exact customer (user)



The screenshot shows the SandSiv+ interface with the 'Users' tab selected. A search bar contains 'volkan' and a dropdown menu shows 'Volkan Uzakgoeren'. Below the search bar is a table of users with columns for NAME, STATUS, CREATED, and UPDATED.

NAME	STATUS	CREATED	UPDATED
<input type="checkbox"/> Eva Vujic (1)	Guest	06/03/2019	06/03/2019 11:29
<input type="checkbox"/> Francois Protopapa	Guest	25/02/2019	25/02/2019 15:53
<input type="checkbox"/> Martin Atanasov (1)	Guest	08/03/2019	08/03/2019 14:43
<input type="checkbox"/> osTicket Support	Guest	08/02/2019	08/02/2019 21:37
<input type="checkbox"/> Sandra Burgsteiner	Guest	01/03/2019	01/03/2019 12:28
<input type="checkbox"/> Volkan Uzakgoeren (5)	Guest	26/02/2019	26/02/2019 16:39

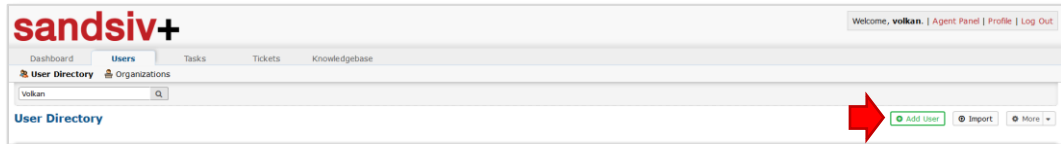
2. By selecting the Customer (User) name you visualize ticket's history and eventually manage open tickets for that precise Customer (User).
Create new Ticket button permit to open a Customer (User) ticket directly form this view.



The screenshot shows the user profile for 'Volkan Uzakgoeren'. It includes fields for Name, Email, Organizations, Status, Created, and Updated. Below the profile is a 'Tickets' section with a table of tickets and a 'Create New Ticket' button.

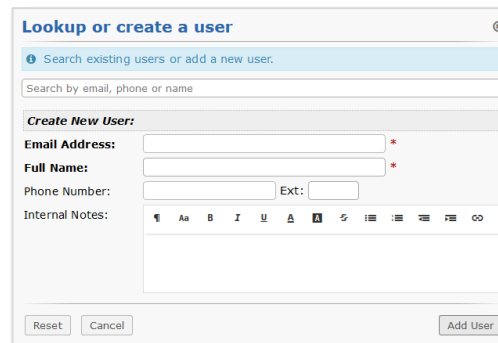
TICKET	LAST UPDATED	STATUS	SUBJECT	DEPARTMENT	ASSIGNEE
00000013	12/03/2019 17:47	Closed - with info & apologies	Phone is not working	Support	volkan uzakgoe...
00000008	27/02/2019 15:53	Closed - with info & apologies	Mobile phone is not working	Support	

3. Select **Add User** in case you want register a new Customer (User) in your VOC ACT system



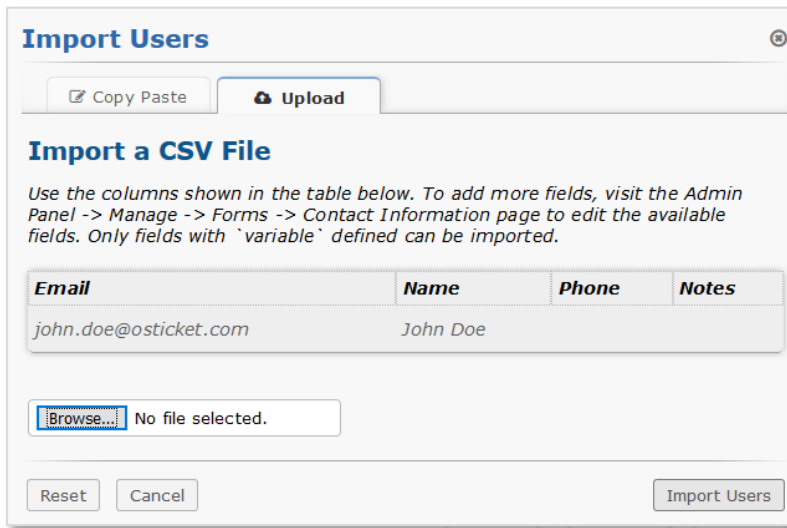
The screenshot shows the SandSiv+ interface with the 'Users' tab selected. The 'Add User' button is highlighted with a red arrow.

4. Enter Customer (User) information and select **Add User**



The screenshot shows the 'Lookup or create a user' form. It includes a search bar, a 'Create New User' section with fields for Email Address, Full Name, Phone Number, and Internal Notes, and buttons for 'Reset', 'Cancel', and 'Add User'.

5. Utilise **Import** function to import a Customer (User) list in the needed format



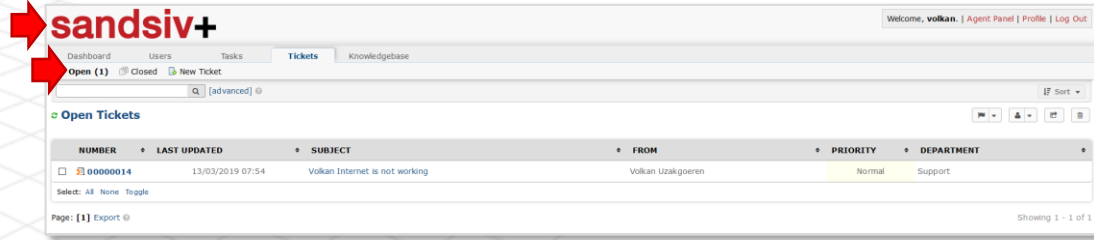
The screenshot shows the 'Import Users' form. It includes tabs for 'Copy Paste' and 'Upload', a section for 'Import a CSV File' with instructions, a table with columns for Email, Name, Phone, and Notes, a 'Browse...' button, and buttons for 'Reset', 'Cancel', and 'Import Users'.

Email	Name	Phone	Notes
john.doe@osticket.com	John Doe		

AGENT ACTIVITIES

Team/Department Ticket's overview & Advanced Ticket Search function

1. Select "sandsiv+" or "Open(#)" functions to visualize your organisation's open tickets which are still not assigned to an agent

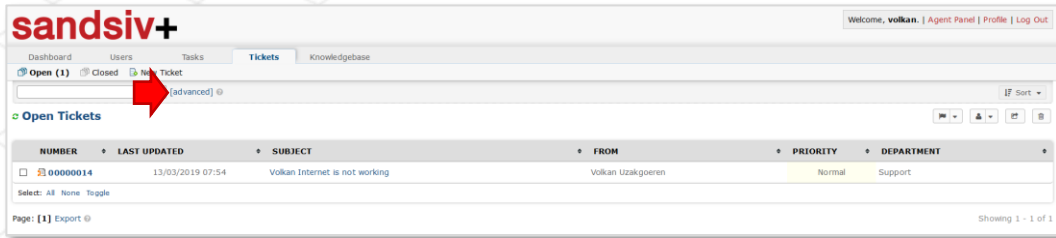


The screenshot shows the 'sandsiv+' interface with the 'Open Tickets' section active. A red arrow points to the 'sandsiv+' logo in the top left corner. The interface includes a navigation bar with 'Dashboard', 'Users', 'Tasks', 'Tickets', and 'Knowledgebase'. Below the navigation bar, there are tabs for 'Open (1)', 'Closed', and 'New Ticket'. A search bar contains the text '[advanced]'. The main content area displays a table of open tickets with columns for NUMBER, LAST UPDATED, SUBJECT, FROM, PRIORITY, and DEPARTMENT. The table contains one row with the following data:

NUMBER	LAST UPDATED	SUBJECT	FROM	PRIORITY	DEPARTMENT
00000014	13/03/2019 07:54	Volkan Internet is not working	Volkan Uzakgoeren	Normal	Support

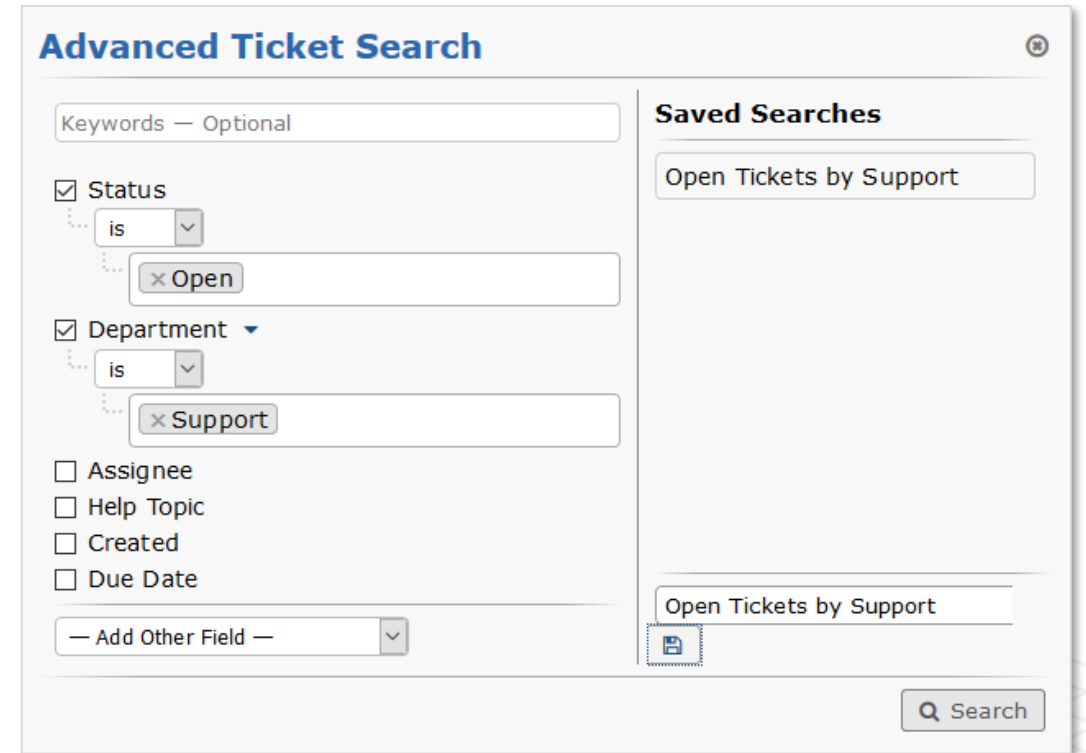
Below the table, there is a 'Select: All None Toggle' and a 'Page: [1] Export' option. The bottom right corner shows 'Showing 1 - 1 of 1'.

2. Utilise Advanced Search for more sophisticated ticket's search



The screenshot shows the 'sandsiv+' interface with the 'Advanced Search' section active. A red arrow points to the 'Advanced Search' button in the top right corner. The interface is identical to the previous screenshot, but the 'Advanced Search' button is highlighted.

3. Filter your ticket's search according different rules and/or save your search criteria for future identical searches



The screenshot shows the 'Advanced Ticket Search' interface. It features a search form with the following fields and options:

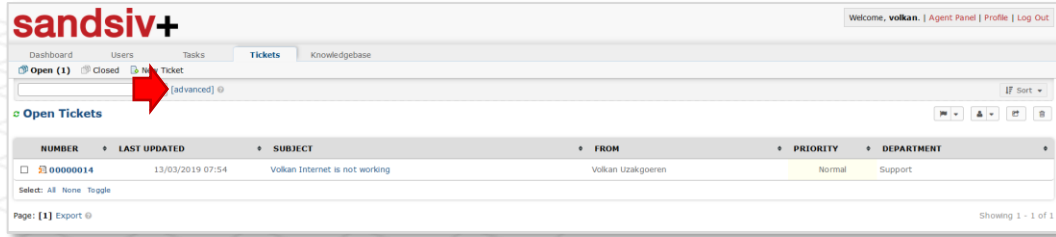
- Keywords — Optional
- Status: is [dropdown] [x Open]
- Department: is [dropdown] [x Support]
- Assignee
- Help Topic
- Created
- Due Date
- Add Other Field — [dropdown]

On the right side, there is a 'Saved Searches' section with a button labeled 'Open Tickets by Support'. At the bottom right, there is a 'Search' button.

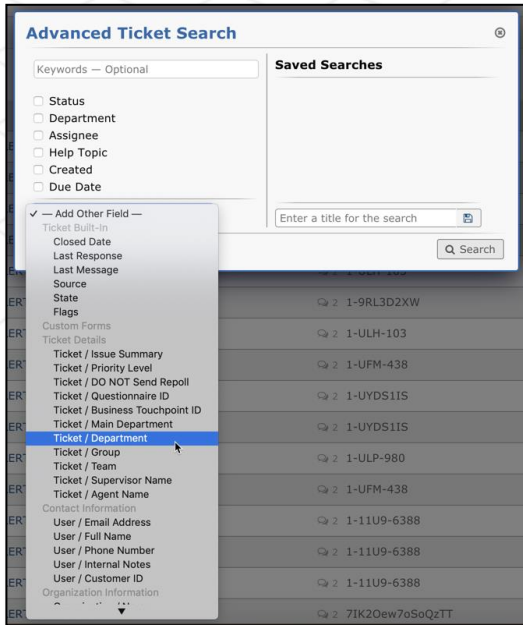
AGENT ACTIVITIES

Filtering according different hierarchy levels

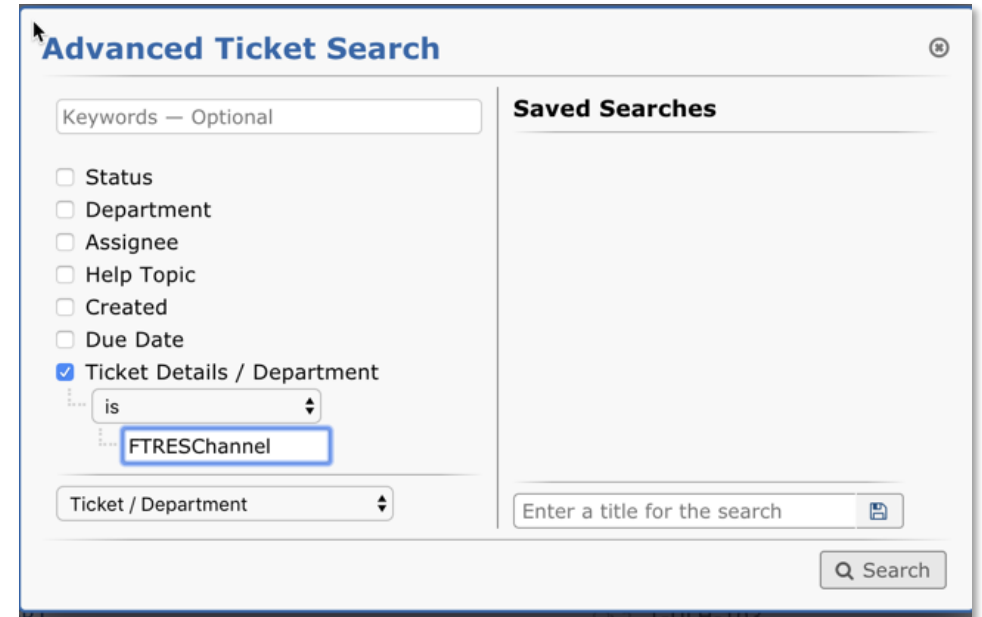
1. Go to **Advanced search**



2. Select **–Add Other Field–** and choose for example **Ticket/Department**



3. Save your search criteria for future identical searches

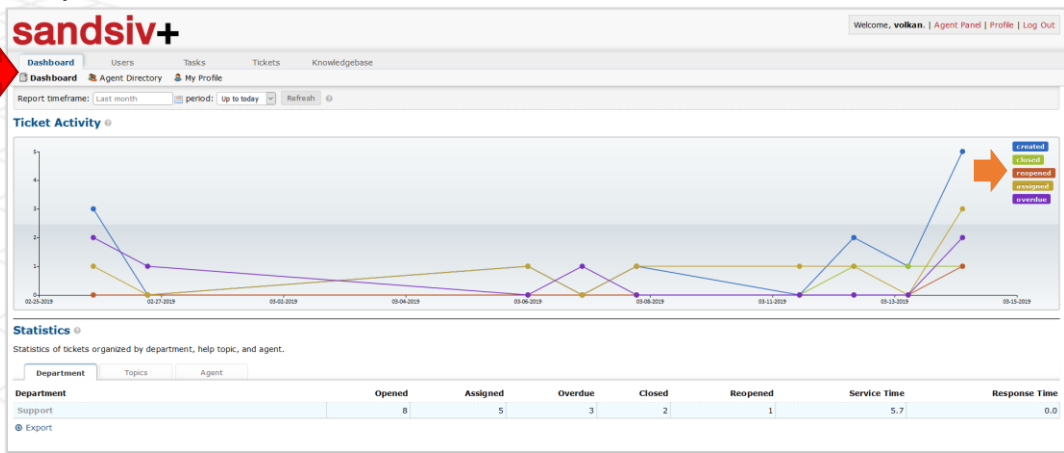


4. Searches are **only visible on your personal VOC ACT account** and not for other users

AGENT ACTIVITIES

Dashboard Tab/Statistic (Dashboard – Agent Directory – My Profile)

1. Select **Dashboard** to see all ticket's trends related to your Department or to you (Agent)
2. Select the **curve(s)** you are interested for (created, closed, reopened, assigned or overdue)
3. **Export** the information if needed into an Excel file



4. **Export** Ticket's statistic for Department, Topics or Agent

	A	B	C	D	E	F	G	H
1	Department	Opened	Assigned	Overdue	Closed	Reopened	Service Time	Response Time
2	Support	8	5	3	2	1	5.7	0
3								
4								

5. Utilise **Agent directory** in case you need to contact agent from other organisations

The screenshot shows the SandSiv+ Agent Directory. It displays a table of agents with columns for Name, Department, Email Address, Phone Number, Extension, and Mobile Number.

NAME	DEPARTMENT	EMAIL ADDRESS	PHONE NUMBER	EXTENSION	MOBILE NUMBER
Ajda Zmazek	Customer Service - Slovenia	ajda.zmazek@a1.si			
Aleksandar Stefanovski	Customer Service - Macedonia	aleksandar.stefanovski@onevip.mk			

3. Utilise **My Profile** change personal setting concerning your account
2. With **Vacation mode** your name will disappear from the "Assignee" list and nobody can assign you tickets during your Vacation

The screenshot shows the SandSiv+ My Account Profile page. It includes a navigation menu with 'Dashboard', 'Users', 'Tasks', 'Tickets', and 'Knowledgebase'. The 'My Profile' tab is active. The page displays a welcome message and a form for account settings.

My Account Profile

Account | Preferences | Signature

Name: volkan uzakgoeren

Email Address: volkan.uzakgoeren@sandsiv.com

Phone Number: [] Ext. []

Mobile Number: []

Authentication

Username: * vuzakgoeren [Change Password]

Status and Settings

Show assigned tickets on open queue.

Vacation Mode

[Save Changes] [Reset] [Cancel]



Agent and Supervisor training session completed.



In the next document's section we present user relevant **Admin features** needed **to run** your VOC ACT instance as Admin.



BECAUSE BEING HUMAN IS A GOOD BUSINESS

sandsiv+
customer intelligence made in switzerland