

InboxHQ Handbook

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Overview

Figure 1. The InBoxHQ Helpdesk web-based interface

The screenshot displays the InBoxHQ web-based interface. At the top left is the logo for 'inboxHQ EMAIL LIFECYCLE MANAGEMENT'. The user is logged in as 'administrator' with a 'logout' link. A navigation bar contains links for 'home', 'search results', 'knowledgebase', 'configuration', 'address book', 'reports', 'my inboxhq', 'advanced options off', and 'save page layout'. The left sidebar features a 'Queues' section with a tree view showing categories like Billing (0), Information (1), Other (0), Sales (2), and Support (1). Below this is a 'Status Breakdown' section with a list of ticket statuses and their counts: new (4), awaiting-reply (0), customer-reply (0), bounced (0), resolved (2), and dead (4). A 'Last 7 Days (New Tickets)' section shows a daily breakdown of new tickets. The 'Statistics' section lists metrics such as 'Number of Tickets Stored' (10) and 'Amount of Correspondence Stored' (16). The main content area is divided into several sections: 'Highest Priority Tickets Assigned to administrator' (showing 0 tickets), 'Newest Unassigned Tickets in All Queues' (showing 0 tickets), 'Quick Ticket Search' (with various filters), and 'Advanced Search Mode >>'. At the bottom, the 'Who's Online' section shows 1 user (Administrator) is online.

There is a variety of e-mail based interaction present in business today. This e-mail interaction exists more commonly (and in greater volume) in Internet-based companies, but can be present at any level in any business. E-mail communication as a customer support medium has several advantages over telephone conversations or written correspondence. First, e-mail is sent and received near instantaneously between any two points on Earth that have access to the Internet - and unlike the telephone or post office, you don't pay for the privilege (just the Internet access). Secondly, it is inherently simple to keep and review a log of previous e-mail conversions - this is not space-efficient with written correspondence, nor is it possible in telephone conversations without outrageously costly equipment out of reach to the majority of businesses.

As most support departments know, efficiently organizing solutions to previous problems is critical to the swiftness and success of your company's customer service. No company wants to pay five people to solve the same problem five different times.

InBoxHQ provides enterprise-level e-mail management with a web-based interface that is both visually and functionally optimized for extensive daily use. By indexing e-mail correspondence in a database, an accumulation of past support experience is at your staff's fingertips in whatever format you need.

I. InBoxHQ

1. What is InBoxHQ Helpdesk?

InBoxHQ Helpdesk provides enterprise-level e-mail management with a web-based interface that is both visually and functionally optimized for extensive daily use. By indexing e-mail correspondence in a database, an accumulation of past support experience is at your staff's fingertips in whatever format you need.

Here are several of the benefits of InBoxHQ over traditional e-mail:

- Tracking all communication with your customers in a single location. No more digging for past responses from your customers or staff in your personal e-mail client. No more quoting an entire conversation in every response, or forwarding replies to a dozen people just to keep everyone in the loop on an issue. The InBoxHQ e-mail parser acts as a proxy, making sure all new responses from your customers are directed back to the support system rather than directly to individual support team members.
- A new staff member can immediately pick up where another left off and be fully up-to-date on any given issue with information provided by the system. An audit log of past ticket actions and ticket correspondence history is available on all tickets. Know instantly what has been done and what needs to be done next.
- The ability to quickly search for past or present tickets based on common criteria, such as: sender, subject, status, queue, content, date-range, custom fields & more.
- You can store your own custom data and information with individual ticket or requestor (e-mail sender) records. No more mental or scribbled notes in various places -- your whole team will have access to this critical information for use in quickly responding to a customer in a personalized manner.
- Providing a uniform corporate image and brand(s) to your existing and potential customers. All

the helpdesk tools can be branded with your company logo(s) and blend together to provide a support experience that keeps the focus on your company.

2. How InBoxHQ Helpdesk Works

Two explanations are provided for how the system works -- brief and technical:

a. Brief Explanation

Step 1: Customer Sends an E-mail

The e-mail support process in InBoxHQ Helpdesk begins with an existing or potential customer sending an e-mail message to one of your company's contact addresses. The content of this e-mail would be redirected from your company mail server to the InBoxHQ Helpdesk parser.

Figure 1-1. Customer e-mail to helpdesk



Step 2: A Ticket is Created

The parser scans and compares components of the e-mail to the database to determine the proper course of action. Once the destination of an e-mail message is determined by pre-defined rules, the e-mail message is split into several parts and is stored in the database. At this time the message is considered "queued".

If this is a new ticket, the customer is sent an auto-response that their message has been received and they are assigned a ticket number for referencing the issue later. Ticket numbers allow you to bring up all previous notes and correspondence regarding an open issue, while saving your customer from the hassle of repeatedly having to explain their problem (or question) to multiple members of your support department. As well, this system allows for "escalation" when one of your support staff members needs to "pass" a ticket to another member with more experience in subjects the ticket may involve.

After a ticket is queued and the customer has been informed their ticket has been created, InBoxHQ Helpdesk will notify your customer support staff of the new ticket. This is done using the notification methods selected in the configuration of the product.

Figure 1-2. The InBoxHQ Helpdesk parser is located on our mail/web servers



Step 3: Staff Reviews Ticket & Replies to Customer

Once an available staff member reviews the new ticket in the GUI, they have the option to "take" it. A staff member who has taken a ticket will communicate with the customer to attempt to solve their problem. A number of tools are provided by InBoxHQ Helpdesk for exactly this purpose. For example, the supporting staff member could browse the knowledgebase for previous occurrences of a similar problem; or look at the individual support history for the client to determine a possible pattern; or utilize other company procedures to troubleshoot a new incident.

When the staff member is ready to communicate their initial (or final) findings with the client, they can initiate a reply from inside the ticket, quoting the customers text to answer separate questions or issues. At this point, the customer may choose to reply with feedback regarding the proposed solution. The communication continues until the customer's problem is solved or a suitable "work around" is found. It would be a perfect world if all ticket's issues were answered completely with one response. Knowing this, most staff members choose to work on another ticket while awaiting customer feedback.

Figure 1-3. The InBoxHQ Helpdesk Graphical User Interface (GUI)

The screenshot shows the inboxHQ helpdesk interface. At the top, it says "logged in as administrator | Logout". Below that is a navigation bar with links: home, search results, knowledgebase, configuration, address book, reports, my inbox, advanced options off, and save page layout. The main content area is divided into several sections:

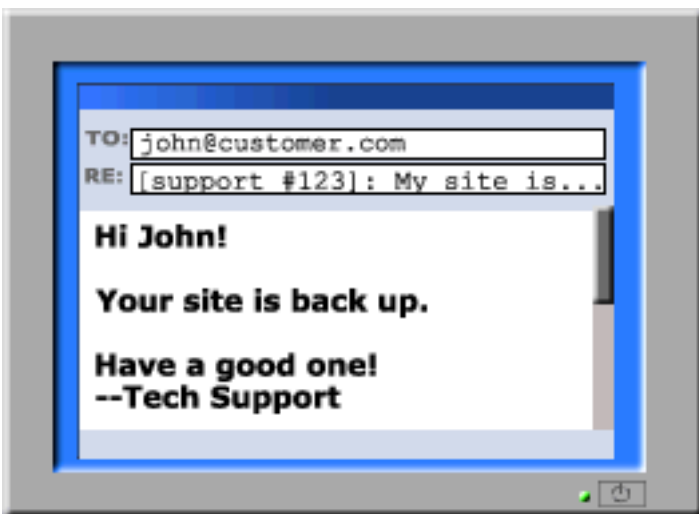
- System Status:** Tue Oct 18 2005 12:20AM
- Queue Load %:** Billing (0), Information (1), Other (0), Sales (2), Support (1)
- Status Breakdown:** new (4), awaiting_reply (0), customer_reply (0), bounced (0), resolved (2), dead (4)
- Last 7 Days (New Tickets):** Tue (Oct 18) 0, Mon (Oct 17) 10, Sun (Oct 16) 9, Sat (Oct 15) 0, Fri (Oct 14) 0, Thu (Oct 13) 0, Wed (Oct 12) 0
- Statistics:** Number of Tickets Stored: 10, Amount of Correspondence Stored: 16, Number of Addresses Stored: 9, Number of Knowledgebase Articles: 0
- Auto Refresh GUI Every:** Don't Auto Refresh [Sat]
- Highest Priority Tickets Assigned to administrator:** A table with columns: all, #, Subject, Wrote Last, Queue, Status, Priority, Due. It shows one ticket with subject "Change Status?".
- Newest Unassigned Tickets in All Queues:** A table with columns: all, #, Wrote Last, Queue, Status, Priority, Age, Due. It shows one ticket with subject "Change Status?".
- Quick Ticket Search:** Search filters for "Is in Queues", "Requester Contains", "Content Contains", "Company Matches", "Status Matches", "Subject Contains", and "Owner Matches". A "Search Now" button is present.
- Who's Online (1 user):** Administrator (Administrator) on the main screen (ip: 66.63.148.130 idle: 0 secs)

Step 4: Ticket Resolved

When the staff member is ready to close the ticket, they update the ticket and set the status to "resolved". They would then be prompted if they would like to enter a summary of the problem and its solution into the company knowledgebase for future use. If the knowledgebase is frequently updated in this fashion, customers browsing the public knowledgebase on your company's web site could potentially find answers to their questions without ever having to contact your support department.

After the ticket has been closed, the staff member moves on to the next unassigned ticket matching their skill set.

Figure 1-4. The customer receives their response from the helpdesk



b. Technical Explanation

When an e-mail is sent to one of your e-mail accounts, InBoxHQ can capture the message through one of the following methods:

- POP3 ("popping"): The system can check a standard POP3 mailbox at a set interval with any mailserver hostname/port/user/password combo. This is the easiest method to set up.
- Piping: This is the optimal solution. E-mail is piped directly from your mail server (MTA) to the InBoxHQ parser in real-time.

After parsing takes place through either method above (piping or popping), the e-mail has been stored and indexed in a MySQL database. This stored information can then be managed with the web-based GUI (graphical user interface).

Actions taken in the GUI can include the following: replying to a customer e-mail; commenting on a customer issue; assigning an issue to a staff member; changing an issue's status; viewing open or closed tickets; viewing queue loads & more.

Your actions may resolve a customers issues and answer their questions, or may prompt further communication through the helpdesk.

II. Administrators Manual

This section describes what you as an Administrator can do after you have purchased InBoxHQ HelpDesk.

1. Logging Into the GUI

Figure 3-1. Login Screen



The screenshot shows the InBoxHQ login interface. At the top left is the InBoxHQ logo, which consists of a green dotted circle containing a white envelope icon, followed by the text 'inboxHQ' in a green sans-serif font and 'EMAIL LIFECYCLE MANAGEMENT' in a smaller, grey sans-serif font below it. Below the logo is a login form with an orange header bar on the left that says 'Login'. The form has two input fields: one labeled 'Login:' and another labeled 'Password:'. At the bottom left of the form is a link that says 'Lost your password?'. At the bottom right is a blue button with the text 'Login'.

The first thing to do after InBoxHQ has been set up is to log into the Support-GUI. Use your browser to navigate to the Support-GUI. The default location would be: <http://<yourdomain>.InBoxHQ.com>. You should have received your admin username and password by email. You will have full access to modify all settings of the system.

a. Lost your password?

You may notice that there is an area on the login screen to get your password should you forget it. The first step is to enter your email address that is set to your account. The system will then email you a verification code. You then enter this code in step 2 and your password will be sent to you via email. It is important to have proper email addresses assigned to users as well so that they can receive the "*E-mail reset verification code*".

2. First view of the Support-GUI

Figure 3-2. First View of Home Page

The screenshot displays the inboxHQ support GUI home page. At the top, the logo "inboxHQ" is visible with the tagline "EMAIL LIFECYCLE MANAGEMENT". The user is logged in as "administrator" and can click "logout". A navigation bar contains links for "home", "search results", "knowledgebase", "configuration", "address book", "reports", "my inboxhq", "advanced options off", and "save page layout".

The main content area is organized into several sections:

- System Status:** Shows the current time as "Tue Oct 18 2005 12:20AM".
- Queue Load %:** A bar chart showing the load percentage for various queues.
- Billing (0), Information (1), Other (0), Sales (2), Support (1):** Summary counts for different ticket categories.
- Status Breakdown:** A list of ticket statuses with counts: new (4), awaiting-reply (0), customer-reply (0), bounced (0), resolved (2), and dead (4).
- Last 7 Days (New Tickets):** A daily breakdown of new tickets: Tue (0), Mon (10), Sun (0), Sat (0), Fri (0), Thu (0), and Wed (0).
- Statistics:** Summary statistics: Number of Tickets Stored (10), Amount of Correspondence Stored (16), Number of Addresses Stored (8), and Number of Knowledgebase Articles (0).
- Auto Refresh GUI Every:** A control to toggle auto-refresh, currently set to "Don't Auto Refresh".
- Highest Priority Tickets Assigned to administrator:** A table with columns: all, #, Subject, Wrote Last, Queue, Status, Priority, Due. It includes action links like "- Change Status?", "- Change Queue?", "- Change Owner?", "- Perform action?", and "Commit".
- Newest Unassigned Tickets in All Queues:** A similar table to the one above, showing unassigned tickets.
- Quick Ticket Search:** Search filters including "Is in Queue:", "Requester Contains:", "Content Contains:", "Company Matches:", "Status Matches:", "Subject Contains:", and "Owner Matches". A "Search Now" button is present.
- Advanced Search Mode >>** A link to access more search options.
- Who's Online: (1 user):** Shows "Administrator (administrator) on the main screen (ip: 66.63.145.130 idle: 0 secs)".

This image is similar to what you would first see after you login. Many areas have no data yet and have little use. It will become obvious what these different areas are for once tickets start to enter the system. In the top-left area of the screen is the *[configuration]* link. Click this to start configuring your system.

3. Configuration

The Configuration area is the brain of the operations. In here is where you will set up all your agents, groups, queues, mail rules, etc. We highly recommend that you only give access to the configuration area to Administrators. Although it would take a bit to render the helpdesk unusable, limiting access to this area ensures that changes aren't made by someone who doesn't have a good idea of what they are doing. We'll start off this section by explaining the main display of the configuration area.

a. Main Page

The first page you will encounter after entering the configuration area consists of the Helpdesk Environment listing and the Client/Server Environment area. This is mostly an informative page for your helpdesk.

Figure 3-3. Configuration Screen

The screenshot displays the InboxHQ Configuration page. At the top left is the InboxHQ logo with the tagline 'EMAIL LIFE CYCLE MANAGEMENT'. The top right shows the user is logged in as 'administrator' with a 'logout' link. A navigation bar below the logo contains links for 'home', 'search results', 'knowledgebase', 'configuration' (highlighted), 'address book', 'reports', 'my inboxhq', and 'advanced options'.

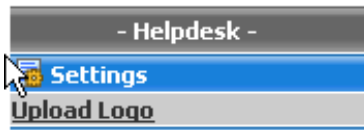
The left sidebar menu is organized into sections:

- Configuration -**: Home
- Helpdesk -**: Settings, Upload Logo, Queues, Edit/Delete Queues, Agents, Create New Agent, Edit/Delete Agents, Manage Groups & Permissions, Plugins, Manage Plugins, Service Level (SLA), Manage SLA Schedules, Manage SLA Plans, Search Indexes, Reindex Knowledgebase Articles, Knowledgebase, New Category, Edit/Delete Categories, Approve/Reject Article Comments, Maintenance, Purge Dead Tickets, Clean-up Attachments, Purge Temp Files
- Parser -**: Parser Settings, Parser Mail Rules, Parser/GUI Log, Block Senders, Export Addresses

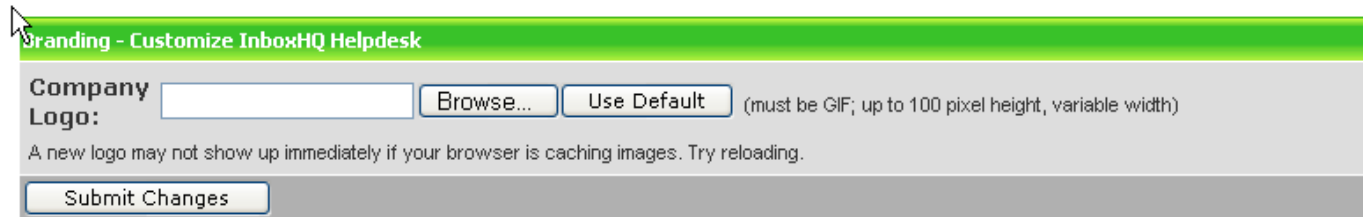
The main content area is titled **Configuration** and includes the instruction: "Please select a configuration option from the menu on the left." Below this are two panels:

- Helpdesk Environment**:
 - There are 2 dead tickets pending purge.
 - There are 0 temporary files (0KB) pending purge.
 - There are 1 attachments (2.0KB) pending clean-up.
 - There are 0 knowledgebase comments pending review.
- Client/Server Environment**:
 - InboxHQ GUI Version:** 2.7.0 Release
 - InboxHQ Parser Version:** 2.x build 592
 - Server Software:** Apache MySQL/4.0.25
 - Machine Type:** FreeBSD
 - Client Browser:** Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.1; SV1; (R1 1.3); .NET CLR 1.1.4322)

b. Settings



This section allows you to upload a customized logo for your helpdesk if you wish to replace the default InBoxHQ Helpdesk logo. It only contains one section, Upload Logo. You may type in the location of the file or you can also browse to the file you would like to upload as your logo. Note that the image must be in GIF format, and has a limit of 100 pixels for the height with a variable width.



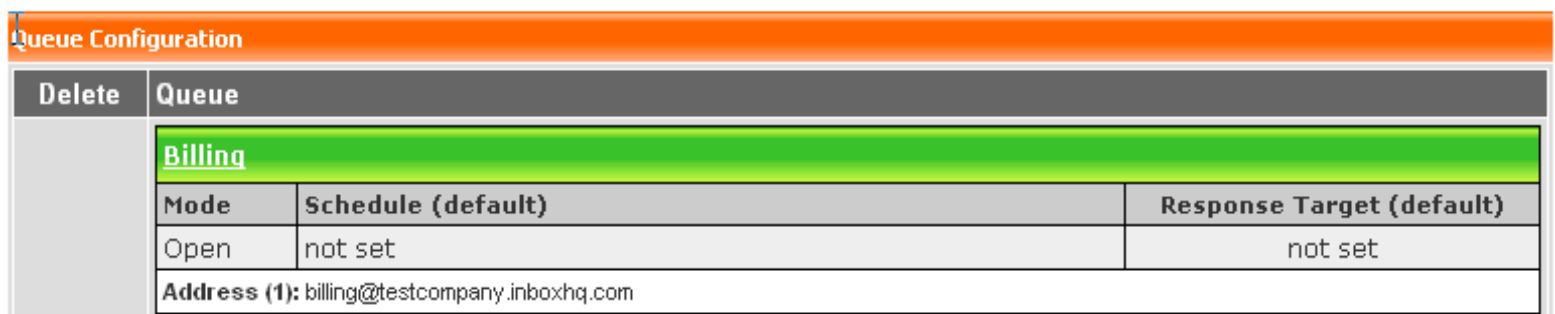
c. Queues



The Queues section is where you will be editing and deleting your queues for use in the system. By default, we have set up and named 5 queues.

Edit/Delete Queues

In the edit/delete queues section, you can edit the queues you have already set up, or delete any existing queues.



Select the queue you wish to edit, in this instance Billing.

The first option you will be able to edit is the Email Friendly From field. This is the email address that will appear in the reply to address when you respond to customer email support request. You can also set the prefix that appears before ticket numbers in the queue. In this example, the tickets in the queue will have "ticket" in front of the ticket number.

Edit Configuration of Queue 'Billing'

Queue Name: (for example: "Support")

E-mail Friendly From: (for example: "XYZ, Inc. Support" or "XYZ, LLC. Sales". Leave blank for normal email address display)

Queue Prefix: (this will prefix the ticket # in e-mail subjects, i.e. [*prefix* #123] :)

Autoreponse template tokens are tokens that you may insert into your autoresponders to include information specific to the current ticket.

Autoreponse Template Tokens:

You can use the following tokens in both the auto-open and auto-close response templates:

##ticket_id## - Ticket ID or Mask
##ticket_subject## - Ticket Subject
##ticket_status## - Ticket Status (new, resolved, etc.)
##ticket_owner## - Ticket Owner User Name
##ticket_due## - Initial Ticket Due Date according to SLA plan/Queue & Schedule
##ticket_time_worked## - The Amount of Agent/Technician Time Spent on this Ticket
##ticket_email## - The Email Body of the Original Ticket Message

##queue_name## - Ticket Queue Name (Support, etc.)
##queue_hours## - Weekly Business Hours this Queue is Staffed (default or SLA override)
##queue_response_time## - Queue's Target Response Time in Business Hours (default or SLA override)

##sla_name## - The Sender's SLA plan (if any, otherwise returns "none").
##contact_name## - The Sender's Full Name (if stored in Contacts, otherwise blank).
##requester_address## - The Sender's E-mail Address that Opened the Ticket.
##company_name## - The Sender's Company Name (if stored in Contacts, otherwise blank).
##company_acct_num## - Company Account Number (if stored in Contacts, otherwise blank).

Responses that can be automatically sent to customers that submit emails/tickets to the helpdesk include when a new ticket is created and/or when the ticket is resolved. If this is enabled, customers will be sent an email with the response you provide within the configuration screen when the ticket is created and/or when it is resolved.

New Ticket Auto Response:

Enable New Ticket Auto Response

Ticket Resolved/Closed Auto Response:

Enable Ticket Resolved Auto Response

You may designate the queue either Open or Gated.

Public Queue Access:

Queue Mode:

Open (Open to all Clients) ▼

Open queues are available for use by any requester.
Gated queues are restricted by Service Level Agreement (SLA) plans that enable access by company (e.g., Priority/Paid Support, etc.)

You may also set default response times for customers not covered by SLA.

Queue Service Level Defaults:

If a client (requester) does not have a Service Level Agreement (SLA) plan covering this queue with a guaranteed response time and defined hours, the following defaults will be used to automatically manage due dates on new tickets and replies.

Default Schedule: - none - ▼

Default Response Time Target: 0 business hours

You can set up an autoresponse to customers who may not be authorized to send to a specific queue.

E-mail Template (if 'Gated'):

The following template is only used if the Queue Mode is 'Gated'. If Cerberus receives e-mail from a sender who isn't authorized by a service-level agreement (SLA) plan to use this queue, this e-mail template will be sent back to the sender and no ticket will be created. This template should include details on how to enable (purchase/renew/etc.) an appropriate SLA plan.

You can use the following tokens in your Access Denied response:
##email_subject## - Subject of the Unauthorized E-mail
##email_to## - Destination Queue E-mail Address of the Unauthorized E-mail
##email_sender## - Sender E-mail Address of the Unauthorized E-mail
##email_date## - Date of the Unauthorized E-mail
##email_body## - Content of the Unauthorized E-mail

Set group permissions for the queue.

Agent Group Access to this Queue:

Group	Queue Access
Administrator:	<input type="radio"/> read <input checked="" type="radio"/> write <input type="radio"/> none
Agent:	<input type="radio"/> read <input checked="" type="radio"/> write <input type="radio"/> none

You may set up the email addresses that will deliver to this queue here. If an email address is not included in the queue configuration, the email will be simply dropped by helpdesk. The first address that you added to the queue will normally be the default reply to address when you reply to tickets. However, you may

Unique E-mail Addresses Assigned to this Queue:

Address	Delete
billing@testcompany.inboxhq.com	<input type="checkbox"/>
Add: <input type="text"/> @ <input type="text"/> (for example: support@yourcompany.com)	

You may designate the queue as a subqueue of another queue here as well.

Subqueues:

Optional. This feature allows you to use this queue as a folder without assigning unique e-mail addresses. This option will share the queue address list from the specified queue when replying, while still keeping tickets separate. For example: if you want to sort sales leads into multiple queues for workflow, but want all replies to come from sales@yourcompany.com, simply set all your sales queues to share the main 'Sales' queue addresses.

Parent Queue:

Once you have completed the configuration/edit of your queue, make sure you submit the changes.

Submit

d. Agents

Agents

- [Create New Agent](#)
- [Edit/Delete Agents](#)
- [Manage Groups & Permissions](#)

The section where you will create new agents for use in your helpdesk. Here you will assign agents/groups to queues, create new admin accounts, and create groups for these agents.

Creating a New Agent

When creating a new agent, you will come upon this screen that will show you fields such as: Agent Name, Agent E-mail Address, Agent Login Name, Agent Password, and Agent Group. It is important to note that the Agent E-mail Address should NOT be a queue address or else you may receive duplicate tickets or mail loops.

New Agent

Agent Name: (for example: "John Doe")

Agent E-Mail Address: (for example: support@yourcompany.com)

NOTE: This address must be a valid e-mail account. If this user plans to respond to tickets from their e-mail client (i.e. Outlook Express) and NOT the GUI, this address must *exactly* match the account and reply-to set up in that e-mail client. Do not use queue addresses here or you will get duplicate tickets or mail loops.

Agent Login Name: (the login name that the agent will log into the system with)

Agent Password:

Agent Password (again): (retype password for verification)

Agent Group: (not required if superuser)

Queue Access:

You can manage queue access for this user at the **group-level** or **user-level**. Group-level access simplifies managing queue permissions for large numbers of users and queues, as updating the queue permissions on a group will automatically update all users associated with that group (e.g., support staff, managers). User-level access overrides the group's queue access for this user only, to allow for special cases.

Queue	Group Access (Default)	User Access (Override)	Watcher
Billing:	<input checked="" type="radio"/> use group access	<input type="radio"/> read <input type="radio"/> write <input type="radio"/> none	<input type="checkbox"/> watcher
Information:	<input checked="" type="radio"/> use group access	<input type="radio"/> read <input type="radio"/> write <input type="radio"/> none	<input type="checkbox"/> watcher
Other:	<input checked="" type="radio"/> use group access	<input type="radio"/> read <input type="radio"/> write <input type="radio"/> none	<input type="checkbox"/> watcher
Sales:	<input checked="" type="radio"/> use group access	<input type="radio"/> read <input type="radio"/> write <input type="radio"/> none	<input type="checkbox"/> watcher
Support:	<input checked="" type="radio"/> use group access	<input type="radio"/> read <input type="radio"/> write <input type="radio"/> none	<input type="checkbox"/> watcher

Submit

Edit/Delete Agents

Much like how the Edit/Delete Queues section worked, you may select agents which you would like to delete or edit. Clicking on a agentname will bring you to the same screen as creating a new agent.

Agent Configuration

Create a New Agent

Administrator

John Doe

Delete

e. Service Level Agreement (SLA)

Service Level (SLA)

Manage SLA Schedules

Manage SLA Plans

Service Level Agreements are integral parts of many businesses today. The application of an SLA plan is to make it so that your company has a set schedule of when to offer support, and in turn it lets customers know when you are available for support as well. Generally SLA's are used in conjunction with fees to guarantee response times or support. The SLA plans in InBoxHQ Helpdesk allow you to give precedence to tickets from certain companies and also allows you to restrict certain queues (also called 'Gated' queues), to customers/companies with the appropriate SLA plan.

Managing SLA Schedules

Schedules are used to maintain the working hours of your queues. The SLA plans depend on these schedules to set due dates.

After clicking on the Create New Schedule link, you will be taken to a new page where you can enter the Schedule name and set the hours for each day of the week. For the time options you may set it to 24 hours, closed (gated), or customize the hours.

Create SLA Schedule

Schedule Name: Such as: "Standard Hours"

Hours:

Day	SLA Hours
Sunday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a
Monday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a
Tuesday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a
Wednesday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a
Thursday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a
Friday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a
Saturday	<input type="radio"/> 24 Hours <input type="radio"/> Closed <input checked="" type="radio"/> Custom: 12:00a - 12:00a

Submit

Managing SLA Plans

This section will allow you to manage different SLA plans. If you already have plans set up, you can edit or delete the existing plans, you can also create new plans.

Service Level Agreement Plans

Create SLA Plan

Explanation: Service Level Agreement (SLA) plans document an enhanced level of support given to a particular company as a contract, usually providing quicker, guaranteed response times for a fee or to meet the customer's requirements. SLAs are used in service-related fields such as Customer Service and Technical Support. SLA Plans in Cerberus are used to give precedence to tickets from certain companies w/ SLA plans. Cerberus helps to enforce guaranteed response times by automatically managing ticket due dates. You may also restrict certain queues (called 'Gated' queues) to customers who have an appropriate SLA plan (e.g., for paid support). If providing SLA options to your customers isn't relevant for your business, you can simply ignore this section.

Delete SLA Plan Name

Delete

After clicking on Create New SLA plan, you will be taken to a new screen which will show a blank field for the Plan name and will also list the queues in your system. The queue modes are open and gated: Open means the queue is available for use by any requestor, Gated queues are restricted to the SLA plan.

Create Service Level Agreement Plan

Plan Name: Such as: "Corporate Support Package"

Plan Includes:

Include	Queue	Queue Mode	SLA Response Schedule	Response (hrs)*
<input type="checkbox"/>	Billing	Open	- none -	<input type="text"/>
<input type="checkbox"/>	Information	Open	- none -	<input type="text"/>
<input type="checkbox"/>	Other	Open	- none -	<input type="text"/>
<input type="checkbox"/>	Sales	Open	- none -	<input type="text"/>
<input type="checkbox"/>	Support	Open	- none -	<input type="text"/>

* SLA Guaranteed Response Time (in business hours using Schedule).

Note: Queues not included in the plan will be handled by their default settings. **Open** queues are available for use by any requester, and **Gated** queues are restricted to SLA plans that enable them by company (e.g., Priority Support, Pager Access, etc.)

Submit

f. Search Indexes

From when you first start receiving tickets, your helpdesk will automatically index all the tickets and knowledgebase articles created. If for any reason you need to update those indexes, the search indexes section will be where you do so.

 Search Indexes

[Reindex Knowledgebase Articles](#)

Reindex Articles

If you would like to reindex just the articles in the knowledgebase, clicking this button will open a new window that shows the progress of the reindexing.

Reindex Knowledgebase Articles

Reindex Articles:

Clicking the button will spawn a new window to proceed with reindexing the knowledgebase articles from the database.

g. Knowledgebase

This section will allow you to configure the base levels of the knowledgebase. You can make new, edit, or delete knowledgebase categories. This section will also allow you to approve/reject Article Comments if you have that option set.

Knowledgebase

[New Category](#)
[Edit/Delete Categories](#)
[Approve/Reject Article Comments](#)

New Category

In this section you will be able to create a new knowledgebase category. You will need to enter a name and select the section to which this category belongs to. Select 'None (Top Level)' to be the top of a tree (e.g. Support, Billing, etc).

Add New Knowledgebase Category

Category Name:

(for example: "Dial-Up", "FTP", "E-Mail")

Category Parent:

Editing/Deleting Categories

You may edit any categories you have created in this section. You may rename the category or select a different category parent.

Knowledgebase Categories Configuration

[Create a New Category](#)


Approve/Reject Article Comments

If you have selected the option that knowledgebase comments require approval in the global settings section, you will be able to view any comments made that needs to be approved here. Any comments that are awaiting approval will be listed and show the Agents e-mail address, their IP address, the date and time, and the category and article in which the comment resides. You may select multiple comments to approve or reject. Any rejected comments will be automatically deleted.

Knowledgebase Article Comments Management

No user comments pending approval.

h. Maintenance

 Maintenance
Purge Dead Tickets
Clean-up Attachments
Purge Temp Files

This section will allow you to purge dead tickets, clean up attachments and purge temp files. If you feel you are having a slowdown, you can try optimizing your database tables to see if that helps.

Purge Dead Tickets

To remove dead tickets from the system, click the Perform button on this section. Tickets marked as dead can only be purged if it meets the time requirement set under Global Settings.

Maintenance

Dead Ticket Purge: 3 Ticket(s) Perform

(deletes all tickets marked 'dead' that are older than the **Purge Wait Time** in Global Settings)

Clean-up Attachments


To remove/clean-up attachments that are no longer needed and slow your database, you may search/filter attachments based on set criteria and then delete the attachments.

Find Attachments to Clean-up

Attachment Search:
Use the filters below to locate attachments which are no longer needed by the helpdesk.

File name contains (case insensitive)

File size bigger than KB

File created after  (mm/dd/yy)

Attachment's ticket is resolved

Return at most 100 results

Search

Remove Attachments

No attachments found. Run a search above to find attachments to prune.

Purge Temp Files

Database performance may also be improved by purging temp files no longer in use

Purge Temporary Files

There are currently no temporary files pending purge.

i. Parser Config

The parser config section contains two subsections, Parser Mail Rules, and Parser GUI Log.

- Parser -
Parser Settings
Parser Mail Rules
Parser/GUI Log
Block Senders
Export Addresses

Parser Mail Rules

In the parser mail rules, you can create rules to be executed as mails come in, before an e-mail message enters the helpdesk or after an e-mail message has been transformed into a ticket. Much like how a filter works for your regular e-mail client, you can set up rules to put specific senders into respective queues, or have spam mails automatically deleted. are run before an e-mail message enters the helpdesk. You may also select the order that a rule will be executed by moving the select rule up and down in the list.

Parser Mail Rules

Pre-Parse Mail Rules

Pre-Parse Mail Rules are run before an e-mail message enters the helpdesk. These rules are best used to combat spam and other nuisances you may not want entering your helpdesk as a ticket.

Create a New Pre-Parse Rule

Post-Parse Mail Rules

Post-Parse Mail Rules are run after an e-mail message has been transformed into a ticket. These are best used to change the properties of a ticket (owner, status, priority, queue) based on your criteria.

Create a New Post-Parse Rule

Currently there are 7 different rule criteria and 6 different rule actions. The 7 rule criteria are as follows: Sender Address, E-mail

Subject, Destination Queue, E-mail is New, E-mail Re-opens a Ticket, Attachment Name, and Spam Probability. The rule actions include Redirect E-mail to, Reply to E-mail with Message, Don't Send Queue Auto-Reply, Don't Send Notifications, Don't Create a Ticket From E-mail and Stop Processing Remaining Rules.

Create Pre-Parse Mail Rule

Rule Name: Choose a name for this rule.

Rule Type: Pre-Parse Mail Rule

Rule Criteria:

<input type="checkbox"/> Sender Address	contains	<input type="text"/>
<input type="checkbox"/> E-mail Subject	contains	<input type="text"/>
<input type="checkbox"/> Destination Queue	equal to	Billing
<input type="checkbox"/> E-mail is New (Not a Reply)	equal to	false
<input type="checkbox"/> E-mail Re-opens a Ticket	equal to	false
<input type="checkbox"/> Attachment Name	contains	<input type="text"/>
<input type="checkbox"/> Spam probability	equal to	<input type="text"/> %

Quick Regular Expression Tester

Rule Actions:

Redirect E-mail to (e-mail address)

Reply to E-mail with Message

Don't Send Queue Auto-Reply

Don't Send Notifications

Don't Create a Ticket From E-mail

Stop Processing Remaining Rules

Note: Enter regular expressions using: */expression/flags*
 More on regular expressions from the [PHP website](#).

Parser/GUI Error Log

If your system experiences any errors, you can view the error logs here. Should you need support for these errors, the InBoxHQ Helpdesk Team may ask to see any errors that have occurred.

Parser/GUI Error Log

Mon Oct 17 2005 07:09PM: CERBERUS PARSER [ERROR]: Incoming message didn't match a queue in TO/CC/BCC (blah@testcompany.inboxhq.com).

Block Senders

In the block senders area you can view all the e-mail addresses that are already being blocked. You may also search for an e-mail address if you can't seem to find it.

E-Mail Addresses

Search for an E-Mail address:

Banned From Address

Export Addresses

The export addresses section allows you to export addresses from the queues in which you select. You also have the choice to select a comma or a line return delimiter, and whether or not you would like to export the addresses to a file, or print it to the screen.

Export Addresses

Select Queues:

Billing
 Information
 Other
 Sales
 Support

Delimiter: Comma Line Return

File Type: Print to Screen Export to File

Note: Printed results will open in a new window.

4. Contacts

The address book link brings you to a new screen which will show you the listing of all the companies and registered contacts that are in the system. Here you can add, edit, or delete these companies/contacts.

Contacts

This is a list of companies, contacts and registered contacts with whom you've communicated.

Contact Substring Search:

(The substring search will match partial company names, contact names and e-mail addresses. It is not case-sensitive. For example: *inc* will match *Widgets, Inc.* and *Acme, Inc.*, etc.)

[[add company](#)]

Companies & Organizations

Name	Service Level (SLA) Plan	Phone	# of Registered Contacts
Showing 1 to 0 of 0			

[[add registered contact](#)]

Registered Contacts

E-mail Address	Contact Name	Company	Registered Addresses
Showing 1 to 0 of 0			

a. Adding a Company

Companies group together the Registered Contacts with whom you communicate. To ensure various companies get the appropriate level of service according to your relationship with them, you can assign a Service Level Agreement (SLA) plan to the company. An SLA will allow InBoxHQ to automatically manage the ticket and response due dates for communication with Registered Contacts under a given company.

When adding a company, you have many fields in which to enter information, however it is not necessary to fill out all the fields in order to add a company.

Company/Organization Details	
Company Name:	<input type="text"/>
Account Number:	<input type="text"/>
Street Address:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Zip/Postal Code:	<input type="text"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
E-mail:	<input type="text"/>
Website:	<input type="text"/>
<input type="button" value="Save Changes"/>	

b. Adding a Contact

A Registered Contact is a user who has access to any public customer services (InBoxHQ Support Center, etc.) that you may be providing to customers through your various websites. You can group all correspondence from this contact by adding their various e-mail addresses to their record. By adding the contact to a company, you can tie all correspondence to a company record -- and the contact may further benefit from company-wide Service Level Agreements (SLAs), etc.

When adding a contact, you will have many fields in which to enter information, however it is not necessary to fill out all the fields to add a client.

Contact Details	
Contact Name:	<input type="text"/>
E-mail Address:	<input type="text"/>
Street Address:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Zip/Postal Code:	<input type="text"/>
Country:	<input type="text"/>
Work Phone:	<input type="text"/>
Home Phone:	<input type="text"/>
Mobile Phone:	<input type="text"/>
Fax:	<input type="text"/>
<input type="button" value="Save Changes"/>	

5. Reports

Currently in InBoxHQ Helpdesk there are 13 reports available in the system. These reports range from the Agent Login Report to the Total Tickets Offered per Queue Report.

Reports

Click on a link below to generate a report.

System Reports
Agent Billable Time Spent by Client -- How much time did agents spend doing billable work for clients during a date range?
Agent Login Report -- Display Logins per day for users.
Agent Performance Report -- Email replies and comments listed by agent over a given date range.
Agent Summary Report -- Date range breakdown for each agent showing average time logged in, average handle time and number of e-mails handled.
Agent Ticket Assignment Report -- Breakdown of assigned tickets per queue grouped by agent.
Average Initial Handle Time Report -- Average of amount of time elapsed between ticket opening and first response by an agent.
Average Response Time Report -- The average amount of time taken to respond to each requester email over a date range, by queue, agent or group.
Average Total Handle Time Report -- Amount of time elapsed between ticket open/reopen and ticket resolved by agent.
Group Assignment Overview -- Overview of who is assigned to what group.
Group Summary Report -- Date range breakdown by group for each agent showing average handle time and number of e-mails handled.
Queue Summary Report -- Date range breakdown by queue for each agent showing average handle time and number of e-mails handled.
Service Level Report - (by resolution time) -- What % of e-mail was resolved by an agent within a given number of hours.
Service Level Report - (by response time) -- What % of e-mail was responded to by an agent within a given number of hours.
Total Tickets Offered per Queue -- Total tickets offered per queue over a date range with the ability to filter by sender.

a. Agent Billable Time Spent by Client Report

The Agent Billable Time Spent by Client Report displays how much time agents spent doing billable work for clients during a date range.

Reports: Agent Billable Time Spent by Client

How much time did agents spend doing billable work for clients during a date range?

[\(back to reports list\)](#)

October 2005						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(October 2005\)](#)
[Show Current Year \(2005\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Only Show Unbilled Work

No data for selected criteria.

b. Agent Login Report

The Agent Login Report displays the logins per day for users in the system over a specified date range. Note that you see the Agents Name (full name NOT the username), the time they logged in, the time they logged out, the total login time, and the IP address with that login. It is also important to note that if a user's login exceeds 12 midnight, their logout time will show on the previous days report.

Reports: Agent Login Report

Display Logins per day for users.

[\(back to reports list\)](#)

< April 2004 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)

[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Agent Login Report for April 01, 2004 to April 30, 2004				
Agent Name	Login	Logout	Total Login	IP Address
Thu Apr 01 2004				
Super User	11:56:29 am	04:11:15 pm	4 hrs, 14 min, 46 sec	192.168.1.107
Tech1	04:11:20 pm	08:17:08 pm	4 hrs, 5 min, 48 sec	192.168.1.107
Fri Apr 02 2004				
Super User	11:59:46 am	02:17:55 pm	2 hrs, 18 min, 9 sec	192.168.1.107
Tech1	02:17:59 pm	02:17:59 pm	0 sec	192.168.1.107

c. Agent Performance Report

The Agent Performance Report will list all e-mail replies and comments over a specified date range. You will notice the Agents Name (full name), the Agent Login name, Replies, and Comments. Please note that this will list all replies to a ticket and does not only count the initial reply.

Reports: Agent Performance Report

Email replies and comments listed by agent over a given date range.

[\(back to reports list\)](#)

< April 2004 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)

[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Agent Performance Report for April 01, 2004 to April 30, 2004			
Agent Name	Agent Login	Replies	Comments
Thu Apr 01 2004			
Super User	superuser	3	0
Sat Apr 03 2004			
Super User	superuser	2	0

d. Agent Summary Report

The Agent Summary Report gives a date range breakdown for every agent, showing the Agent Name, Agent Login, the number of Email Handled, the Average Response Time, and the Average Time Logged In. Please note that the number of Emails listed here only includes initial e-mails that are replied to and resolved. It does not count further replies to the same e-mail. If the date of the e-mail is before the range of the report, it will not show up for that report, but would show up in a report of the date range of when the ticket was created.

Reports: Agent Summary Report

Date range breakdown for each agent showing average time logged in, average handle time and number of e-mails handled.

[\(back to reports list\)](#)

April 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.
[Show Current Month \(April 2004\)](#)
[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Agent Summary Report for April 01, 2004 to April 30, 2004				
Agent Name	Agent Login	Email Handled	Avg. Response Time	Avg. Time Logged In
Super User	superuser	42	14 hrs, 19 min, 5 sec	1 min, 17 sec
Agent Averages		1 agents	14 hrs, 19 min, 5 sec	1 min, 17 sec
System Averages (weighted)		42 samples	14 hrs, 19 min, 5 sec	1 min, 17 sec

e. Agent Ticket Assignment Report

The Agent Ticket Assignment Report gives a breakdown of the number of assigned tickets per queue grouped by the agent name. You can filter the report to choose a specific agent, or you may show all agents (default).

Reports: Agent Ticket Assignment Report

Breakdown of assigned tickets per queue grouped by agent.

[\(back to reports list\)](#)

Filter by Agent:

Agent Ticket Assignment Report	
Agent: Super User	
Queue	Number of Assigned Tickets
Support	8
Total Assigned Tickets: 8	

f. Average Initial Handle Time Report

The Average Initial Handle Time Report shows the average amount of time that elapses between a ticket opening and the first response made by an agent. You can filter this report by entering a specific date range, by group, by agent, or by queue.

Reports: Average Initial Handle Time Report

Average of amount of time elapsed between ticket opening and first response by an agent.

[\(back to reports list\)](#)

April 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)
[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Filter by Group:
Filter by Agent:
Filter by Queue:

Average Initial Handle Time Report for April 01, 2004 to April 30, 2004			
Agent Name	Agent Login	Samples	Avg. Initial Response Time
Super User	superuser	40	15 hrs, 1 min, 55 sec
Agent Average Initial Handle Time		1 agents	15 hrs, 1 min, 55 sec
System Average Initial Handle Time (weighted)		40 samples	15 hrs, 1 min, 55 sec

g. Average Response Time Report

The Average Response Time Report shows the average amount of time it takes to respond to/forward a requesters ticket. You can filter this report by entering a specific date range, by group, by agent, or by queue.

Reports: Average Response Time Report

The average amount of time taken to respond to each requester email over a date range, by queue, agent or group.

[\(back to reports list\)](#)

April 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)
[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Filter by Group:
Filter by Agent:
Filter by Queue:

Average Response Time Report for April 01, 2004 to April 30, 2004				
Agent Name	Agent Login	Replies/Forwards	Avg. Response Time	Avg. Forward Time
Super User	superuser	42 / 1	14 hrs, 19 min, 5 sec	7 days, 19 hrs, 38 min, 32 sec
Agent Average Response/Forward Times		1 agents	14 hrs, 19 min, 5 sec	7 days, 19 hrs, 38 min, 32 sec
System Average Response/Forward Times (weighted)		42 / 1 samples	14 hrs, 19 min, 5 sec	7 days, 19 hrs, 38 min, 32 sec

h. Average Total Handle Time Report

The Average Total Handle Time Report shows the amount of time elapsed between a ticket being opened/reopened and being resolved by an agent. You can filter this report by entering a specific date range, by group, by agent, or by queue.

Reports: Average Total Handle Time Report

Amount of time elapsed between ticket open/reopen and ticket resolved by agent.

[\(back to reports list\)](#)

April 2004

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Enter Date Range: to (enter as mm/dd/yy)

Filter by Group:
Filter by Agent:
Filter by Queue:

Average Total Handle Time Report for April 01, 2004 to April 30, 2004			
Agent Name	Agent Login	Samples	Avg. Resolve Time
Super User	superuser	16	1 day, 18 hrs, 32 min, 57 sec
Agent Average Resolve Time		1 agents	1 day, 18 hrs, 32 min, 57 sec
System Average Resolve Time (weighted)		16 samples	1 day, 18 hrs, 32 min, 57 sec

i. Group Assignment Overview

The Group Assignment Overview report shows which user is assigned to a group. It will list the Agents Name, their Email Address, and their Agent Login name. You may filter this report by a specific group, or show all groups.

Reports: Group Assignment Overview

Overview of who is assigned to what group.

[\(back to reports list\)](#)

Filter by Group:

Group Assignment Overview		
Group: Not Assigned		
Agent Name	Email Address	Agent Login
Super User	demo@webgroupmedia.com	superuser

j. Group Summary Report

The Group Summary Report gives a date range breakdown by group for each agent, showing their average handle time and number of e-mails handled (actual number of e-mails, not replies).

Reports: Group Summary Report

Date range breakdown by group for each agent showing average handle time and number of e-mails handled.

[\(back to reports list\)](#)

April 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)

[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Group Summary Report for April 01, 2004 to April 30, 2004			
Group: Unassigned			
Agent Name	Agent Login	Email Handled	Avg. Response Time
Super User	superuser	42	14 hrs, 19 min, 5 sec
		42	14 hrs, 19 min, 4 sec
Group Averages		1 groups	14 hrs, 19 min, 5 sec
System Averages (weighted)		42 samples	14 hrs, 19 min, 5 sec

k. Queue Summary Report

The Queue Summary Report gives a date range breakdown by queue for each agent, showing their average handle time and number of e-mails handled (actual number of e-mails, not replies).

Reports: Queue Summary Report

Date range breakdown by queue for each agent showing average handle time and number of e-mails handled.

[\(back to reports list\)](#)

April 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)

[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Queue Summary Report for April 01, 2004 to April 30, 2004			
Queue: Support			
Agent Name	Agent Login	Email Handled	Avg. Response Time
Super User	superuser	42	14 hrs, 19 min, 5 sec
		42	14 hrs, 19 min, 4 sec
Queue Averages		1 queues	14 hrs, 19 min, 5 sec
System Averages (weighted)		42 samples	14 hrs, 19 min, 5 sec

I. Service Level Report

The Service Level Report shows what percentage of e-mail was responded to an agent within a given number of hours. You can filter this report by date, the number of hours, by group, and by queue.

Reports: Service Level Report

What % of e-mail was responded to by an agent within a given number of hours.

[\(back to reports list\)](#)

< April 2004 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)
[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Agent Reply Within: hour(s)

Filter by Group: **Filter by Queue:**

Service Level Report for April 01, 2004 to April 30, 2004		
Queue: Support		
Group	Email Handled	Replied within 24 hour(s)
Unassigned	42	78.57%
	42	78.57%
Grand Total:	42	78.57%

m. Total Tickets Offered per Queue

This report shows the total number of tickets offered per queue over a date range. You may filter this report by date, by queue, and additionally by a requester.

Reports: Total Tickets Offered per Queue

Total tickets offered per queue over a date range with the ability to filter by sender.

[\(back to reports list\)](#)

< April 2004 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Use the calendar to the left to choose which month or day to display a report for, or choose a quick option below.

[Show Current Month \(April 2004\)](#)
[Show Current Year \(2004\)](#)

Enter Date Range: to (enter as mm/dd/yy)

Filter by Queue: **Search By Requester:**

Total Tickets Offered per Queue for April 01, 2004 to April 30, 2004	
Queue	Tickets
Support	144
Total Queues: 1	Total Tickets: 144

III. User Manual

Although we try to make InBoxHQ Helpdesk as user friendly and easily understandable as possible, we understand that some functions of the helpdesk may be totally new to you. This section of the manual will describe what and how functions such as "Quote and Reply" and "Set Resolved" do.

1. The Basics

Everyone has to start somewhere and just as well, we will start off in the very basics of logging into the helpdesk and what you will first see after you login.

a. Logging in

The first thing to do after InBoxHQ has been set up is to log into the Support-GUI. Use your browser to navigate to where you installed the Support-GUI. The default location would be: <http://<yourdomain>.InBoxHQ.com>. Enter your username and password as supplied to you by your administrator.



Login

Login:

Password:

[Lost your password?](#)

You may notice that there is an area on the login screen to get your password should you forget it. The first step is to enter your email address that is set to your account. The system will then email you a verification code. You then enter this code in step 2 and your password will be sent to you via email. It is important to enter the proper email addresses assigned to you so that you can receive the "*E-mail reset verification code*".

Lost your password?

E-mail Address:

E-mail reset verification code. (step 2)

Code sent in e-mail:

[Return to Login Form](#)

b. Overview of the GUI

The screenshot displays the inboxHQ support GUI interface. At the top left is the inboxHQ logo with the tagline "EMAIL LIFECYCLE MANAGEMENT". The user is logged in as "administrator" with a "logout" link. A navigation bar contains links for "home", "search results", "knowledgebase", "configuration", "address book", "reports", "my inboxhq", "advanced options off", and "save page layout".

The main content area is divided into several sections:

- System Status:** Shows the current date and time: "Tue Oct 18 2005 12:20AM".
- Queue Load %:** A bar chart showing the load for various queues: Billing (0), Information (1), Other (0), Sales (2), and Support (1).
- Status Breakdown:** A list of ticket statuses with counts: new (4), awaiting-reply (0), customer-reply (0), bounced (0), resolved (2), and dead (4).
- Last 7 Days (New Tickets):** A table showing the number of new tickets received each day from Oct 12 to Oct 18.
- Statistics:** A summary of system metrics: Number of Tickets Stored (10), Amount of Correspondence Stored (16), Number of Addresses Stored (8), and Number of Knowledgebase Articles (0).
- Auto Refresh GUI Every:** A control to toggle auto-refreshing the GUI, currently set to "Set".
- Highest Priority Tickets Assigned to administrator:** A table with columns for "all", "#", "Subject", "Wrote Last", "Queue", "Status", "Priority", and "Due". It includes action links like "- Change Status?", "- Change Queue?", "- Change Owner?", "- Perform action?", and a "Commit" button.
- Newest Unassigned Tickets in All Queues:** A similar table to the one above, but for unassigned tickets.
- Quick Ticket Search:** A search interface with fields for "Is in Queue:", "Requester Contains:", "Content Contains:", "Company Matches:", "Status Matches:", "Subject Contains:", and "Owner Matches:". It includes a "Search Now" button.
- Who's Online: (1 user):** A section showing "Administrator (administrator) on the main screen (ip: 66.63.145.130 idle: 0 secs)".

This image will probably be similar to how you will first see the Support GUI (Note: There may or may not be any data in the system yet depending on how long your helpdesk has been live). You will notice that the GUI is laid out in a few different areas.

Quick Jump Tabs and Advanced Options

The top of the GUI is where you will find your quick jump tabs. These tabs include: Home, Search Results, the Knowledgebase, Address Book, and My Inboxhq (Dashboard). (Note: Links will vary depending on what your administrators have set up). The Advanced Options include: Ability to Quick Assign tickets, Ability to jump to a specific queue, Ability to create a new ticket in a specific queue, and also the Ability to go to a specific ticket itself. Later sections will cover what exactly each of these items will do.

This screenshot shows a different view of the inboxHQ support GUI, specifically the "Advanced Options" section. The user is logged in as "agent1". The navigation bar is similar to the previous screenshot, but the "advanced options" tab is now "on".

The main content area features:

- Configure my quick assign settings:** A section with a "New Ticket in" button and a dropdown menu currently set to "Billing".
- Quick Queue:** A dropdown menu set to "Billing" and a "Go!" button.
- Goto ticket:** A text input field and a "Goto ticket" button.

System Overview

The left hand column is an overview of what is going on in the system. Here you can see the System Status, Queue Load %, Status Breakdown, the Last 7 days and amount of tickets per day, and general statistics of the system.

System Status	
Wed Oct 19 2005 05:51 PM	
Queue Load %	
Billing (0)	<div style="width: 0%;"></div>
Information (1)	<div style="width: 10%;"></div>
Other (0)	<div style="width: 0%;"></div>
Sales (1)	<div style="width: 10%;"></div>
Support (2)	<div style="width: 20%;"></div>
Status Breakdown	
<u>new</u>	4
<u>awaiting-reply</u>	0
<u>customer-reply</u>	0
<u>bounced</u>	0
<u>resolved</u>	3
<u>dead</u>	2
Last 7 Days (New Tickets)	
Wed (Oct 19)	0
Tue (Oct 18)	2
Mon (Oct 17)	10
Sun (Oct 16)	0
Sat (Oct 15)	0
Fri (Oct 14)	0
Thu (Oct 13)	0
Statistics	
Number of Tickets Stored	9
Amount of Correspondence Stored	9
Number of Addresses Stored	13
Number of Knowledgebase Articles	0
Auto Refresh GUI Every	
Don't Auto Refresh	<input type="button" value="Set"/>

Main View

You'll notice that the right section of the helpdesk is the most prominent. This is the main view of any tickets in the system (dependent on the view you have set, more on that later) and any tickets assigned to you.

Highest Priority Tickets Assigned to agent1							options
all	#	Subject	Wrote Last	Queue	Status	Priority	Due
- Change Status? -		+ - Change Queue? -		+ - Change Owner? -		+ - Perform action? -	
Commit							
(Showing 0-0 of 0)							

Newest Unassigned Tickets in All Queues							options
all	#	Wrote Last	Queue	Status	Priority	Age	Due
<input type="checkbox"/>	Test 000012	john@testcompany.com	Support	new	Unassigned	15h	overdue
<input type="checkbox"/>	My Bike 000005	paula@yahoo.com	Support	new	Unassigned	2d	overdue
<input type="checkbox"/>	Interested in re-selling your Bikes 000006	joe@gmail.com	Sales	new	Unassigned	2d	overdue
<input type="checkbox"/>	Requesting Information on the Product 000001	joey@aol.com	Information	new	Unassigned	2d	overdue
- Change Status? -		+ - Change Queue? -		+ - Change Owner? -		+ - Perform action? -	
Commit							
(Showing 1-4 of 4)							

Access to search tickets and view the other technicians online are located just below this main view.

Quick Ticket Search			
Is in Queue:	Information	Status Matches:	- any active -
Requester Contains:	<input type="text"/>	Subject Contains:	<input type="text"/>
Content Contains:	<input type="text"/>	Owner Matches:	- any owner -
Company Matches:	- any company -		
Advanced Search Mode >>			
			Search Now

The Who's Online section shows all current users and their ip addresses that are logged into the system.

Who's Online: (1 user)
tech1 is on the main screen (ip: 192.168.1.103 idle: 1s)

2. Getting Started

a. The Quick Jump Tabs

The quick jump tabs allow you to go to 6 different sections of the dashboard. The list is as follows: Home, Search Results, Knowledgebase, Configuration, Address Book, and My InboxHQ (Dashboard). It also allow you to view your Advanced Options and Save Page Layout. For a more detailed explanation of what the dashboard and its components do, please see below.



Home

As self explanatory as it gets, the Home link sends you to the front page of the helpdesk!

Search Results

The Search Results link only appears after you have done a search in the system. It will relist your last search results that you looked for. If no searches have been made (Like the first time you log in for the day), this link will not appear.

Knowledgebase

The Knowledgebase link (if applicable, your company may not be using the knowledgebase) takes you to, you guessed it, the Knowledgebase. Here you can view articles that your company has entered for referencing.

Configuration

The Configuration link sends you to the configuration page for InBoxHQ Helpdesk. You may or may not have access to this link depending on your group levels set by your Superuser/Administrators.

Address Book

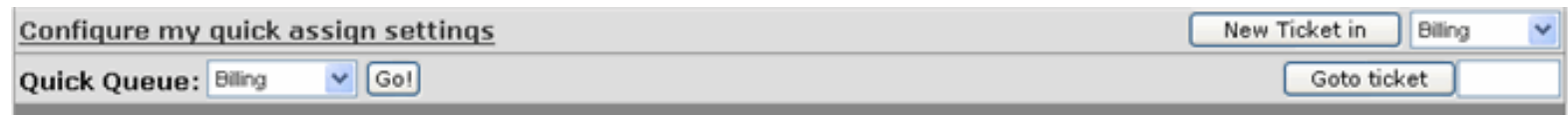
The Address Book link sends you to a page with all the company and contact listings with whom you have communicated.

My InboxHQ

The Reports link will take you to the listing of reports that are available to be run on the system. You may or may not have access to these reports depending on your group access.

b. Advanced Options

Located underneath the Quick Jump links are the Advanced Options.



Configure my quick assign settings

New Ticket in Billing

Quick Queue: Billing Go!

Goto ticket

Quick Queue

The Quick Queue jump allows you to quickly go and view tickets in a specific queue. Only queues that your group has access to will show up in this dropdown

New Ticket In

The New Ticket In button allows you to select a specific queue in which you would like to start a new ticket. After hitting the "Go!" button, you will be taken to a new ticket page.

GoTo Ticket

The Goto Ticket jump allows you to specify a ticket number you want to view. Both masked and non-masked ticket numbers (e.g. 1540, or #EFX-55467-153) apply in this area.

Configure My Quick Assign Link

The quick assign/watcher link allows you to have certain queues automatically assign tickets to you or give you the ability to receive e-mails anytime something happens within a queue. For quick assignment, select the queues you want to have automatically assigned to you and then hit submit. You can also choose how many tickets you want to be assigned to you at once. Watchers receive an e-mail copy of all new tickets and correspondence for the queues you select.

Quick Assign & Watcher Settings

The **quick assign** column below determines which queues will be used by the quick assign feature in the header above. Choose the queues you would like to have tickets assigned to you from. For example: assign from the queues '**Support**' and '**Sales**', but don't assign from the queues '**Failure Notices**' or '**Virus/SPAM**'.

As a **watcher** you will receive an e-mail copy of all new tickets and correspondence for the queues you select below. A watcher can read and reply to tickets through any e-mail client, or simply use the e-mail messages as a notification to log into the GUI.

Your watcher e-mails will be sent to: <**agent1@testcompany.inboxhq.com**>.

Queue	Quick Assign	Watcher
Billing	<input type="checkbox"/>	<input type="checkbox"/>
Information	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>
Sales	<input type="checkbox"/>	<input type="checkbox"/>
Support	<input type="checkbox"/>	<input type="checkbox"/>

Quick Assign: Don't assign me more than ticket(s) at once.

c. System Overview

The System Overview is located on the left hand column of your screen. This area has a blue header (set on default colors)

System Status	
Wed Oct 19 2005 05:51 PM	
Queue Load %	
Billing (0)	<div style="width: 0%;"></div>
Information (1)	<div style="width: 10%;"></div>
Other (0)	<div style="width: 0%;"></div>
Sales (1)	<div style="width: 10%;"></div>
Support (2)	<div style="width: 20%;"></div>
Status Breakdown	
new	4
awaiting-reply	0
customer-reply	0
bounced	0
resolved	3
dead	2
Last 7 Days (New Tickets)	
Wed (Oct 19)	0
Tue (Oct 18)	2
Mon (Oct 17)	10
Sun (Oct 16)	0
Sat (Oct 15)	0
Fri (Oct 14)	0
Thu (Oct 13)	0
Statistics	
Number of Tickets Stored	9
Amount of Correspondence Stored	9
Number of Addresses Stored	13
Number of Knowledgebase Articles	0
Auto Refresh GUI Every	
Don't Auto Refresh	<input type="button" value="Set"/>

System Status

The System Status shows the Date and Time of your local InBoxHQ Helpdesk system.

Queue Load Percentage

The Queue Load % (Percentage) section shows all queues in the system and the number of tickets in each queue. The bar next to each queue represents the percentage load to the system.

Status Breakdown

The Status Breakdown shows the number of new tickets, tickets awaiting reply, tickets the customer has replied to, tickets bounced, resolved and dead.

Last 7 Days (New Tickets)

The Last 7 Days section shows the amount of tickets that entered into the system day by day for the previous seven days (note: The current day is included in those seven days). These numbers may change depending on how many tickets you mark as dead/spam to ensure accuracy of the amount of tickets received.

Statistics

The Statistics view shows four different lines.

1) Number of Tickets Stored

The total amount of tickets stored in your system. Again this number may change as tickets are marked dead/spam and purged.

2) Amount of Correspondence Stored

The total amount of threads stored in the system. This can include replies, forwards, and comments.

3) Number of Addresses Stored

The total amount of requestor addresses stored in the system.

4) Number of Knowledgebase Articles

The total amount of articles available for use in the knowledgebase system. (Your system may not use a knowledgebase, so this field may be empty)

Auto Refresh GUI

This functions as the same under Preferences in your dashboard. You can use this to set how many minutes you want the system to automatically refresh the main page.

d. Main Ticket View

The main ticket views fills the majority of the page. Here you will find areas such as Highest Priority Tickets Assigned and Newest Unassigned Tickets. (These are the default views when the system first goes live. Your views may differ as your company creates new views to better customize your helpdesk!)

Highest Priority Tickets Assigned to agent1							options
all	#	Subject	Wrote Last	Queue	Status	Priority	Due
- Change Status? - <input type="button" value="v"/> + - Change Queue? - <input type="button" value="v"/> + - Change Owner? - <input type="button" value="v"/> + - Perform action? - <input type="button" value="v"/>							
<input type="button" value="Commit"/>							
(Showing 0-0 of 0)							

Newest Unassigned Tickets in All Queues							options	
all	#	Subject	Wrote Last	Queue	Status	Priority	Age	Due
<input type="checkbox"/>	Test	000012	john@testcompany.com	Support	new	Unassigned	17h	overdue
<input type="checkbox"/>	My Bike	000005	paula@yahoo.com	Support	new	Unassigned	2d	overdue
<input type="checkbox"/>	Interested in re-selling your Bikes	000006	joe@gmail.com	Sales	new	Unassigned	2d	overdue
<input type="checkbox"/>	Requesting Information on the Product	000001	joey@aol.com	Information	new	Unassigned	2d	overdue
- Change Status? - <input type="button" value="v"/> + - Change Queue? - <input type="button" value="v"/> + - Change Owner? - <input type="button" value="v"/> + - Perform action? - <input type="button" value="v"/>								
<input type="button" value="Commit"/>								
(Showing 1-4 of 4)								

Highest Priority Tickets Assigned (Default view)

In the default view, this area will show you all tickets assigned to you by order of priority. As you accumulate tickets, you can set the filter below to display as few/many tickets as you would like. Tickets contain checkboxes next to the Ticket ID which allows you to Change Status, Change Queue, Change Owner, and Perform Action on as many tickets as you would like at a time.

Newest Unassigned Tickets (Default view)

In this default view, this area will show all new tickets that are currently unassigned. This area may be set either by newest ticket first or oldest ticket, depending on how your company wishes to choose to set up their views. Like the Highest Priority Tickets Assigned view, you have the option to filter how many tickets to display and have the same four options to change the tickets in this view.

Quick Ticket Search

The Quick Ticket Search area allows you to do a multitude of searches. In this section you can search for tickets in a queue, by the status, by the sender, by the subject, by the content, by the ticket owner, and finally by company.

Quick Ticket Search			
Is in Queue:	Information <input type="button" value="v"/>	Status Matches:	- any active - <input type="button" value="v"/>
Requester Contains:	<input type="text"/>	Subject Contains: <input type="checkbox"/>	<input type="text"/>
Content Contains: <input type="checkbox"/>	<input type="text"/>	Owner Matches:	- any owner - <input type="button" value="v"/>
Company Matches:	- any company - <input type="button" value="v"/>		
Advanced Search Mode >>			
			<input type="button" value="Search Now"/>

Who's Online

The Who's Online section will show all the users that are logged into the system. It displays the username, their IP address, their idle time, and also contains a link to send them a private message (PM).

Who's Online: (1 user)
tech1 is on the main screen (ip: 192.168.1.103 idle: 1s)

3. Ticket views

We will start taking a more in depth look at how tickets look and what functions you, the technician, can do in this area.

a. The Main Ticket View

The normal view of a support ticket consists of a few different sections. We will show what each section contains and what you as a technician can do in each view.

The screenshot shows the inboxHQ interface for viewing a support ticket. At the top left is the inboxHQ logo with the tagline "EMAIL LIFE CYCLE MANAGEMENT". On the top right, it indicates the user is logged in as "agent1" with a "logout" link and shows the last viewed ticket as "Test". A navigation bar contains links for "home", "search results", "knowledgebase", "address book", "my inboxhq", "advanced options off", and "save page layout". Below this is a configuration bar for "Configure my quick assign settings" with a "New Ticket in" button set to "Billing" and a "Go!" button. A "Quick Queue" section also shows "Billing" selected and a "Goto" button. The main ticket title is "Ticket #12: Test", with links to "jump to latest message" and "customize page layout". A row of action buttons includes "Display Thread" (highlighted in green), "Properties", "Anti-Spam", "Batch", and "Log". The "Ticket Conversation" section has links to "toggle activity threads" and "toggle time tracking threads". The email content shows a message from "john@testcompany.com" dated "Wed Oct 19 2005 02:42AM" with subject "Test". Action buttons for "Reply", "Quote & Reply", "Quote & Forward", "Comment", and "More Options..." are visible. The email header includes "From: john@testcompany.com", "Cc: janedoe@testcompany.com", "Reply-To: john@testcompany.com", and "Date: Tue, 18 Oct 2005 18:42:01 -0700". A "back to top" link is at the bottom right.

The Header

The header on top of the page stays the same as the home page of the helpdesk so you can easily navigate out of a ticket.

[home](#) | [search results](#) | [knowledgebase](#) | [address book](#) | [my inboxhq](#) | [advanced options on](#) | [save page layout](#)

[Configure my quick assign settings](#)

Quick Queue:

Tabs

There are six tabs available to you. They include: Display Thread, Properties/Ticket Fields, Manage Requesters/Fields, Anti-Spam, Batch, and Log.

Ticket #12: Test

[jump to latest message](#) | [customize page layout](#)

Display Thread
Properties
Anti-Spam
Batch
Log

Display Thread

This tab is the main view of any ticket. It shows the, Ticket Properties at a Glance, Ticket Vital Signs, Customer Support History, Company/Service Level Agreement Details, Ticket Audit Log (Last 5 Actions), and the Ticket Thread.

Ticket Properties at a Glance

This section of the display thread allows you to quickly view and/or change a tickets owner/status without needing to scroll through the entire thread itself. You can see/change the Ticket ID, its Status, the Ticket Owner, the time worked, the Ticket Priority, and the Queue which the ticket is in. Here you also have the Spam Probability Rating and Training button.

Ticket Properties at a Glance ▲

ID	Status	Owner	Worked	Priority	Queue
12	<input type="button" value="new"/>	<input type="button" value="Nobody"/>	0s	<input type="button" value="Unassigned"/>	<input type="button" value="Support"/>

40.00%
Spam probability ([why?](#))
 Training:

Ticket Vital Signs

The ticket vital signs section shows the date/time which the ticket was created, the due date/time of the ticket, the

number of requesters (e-mail addresses) in the ticket, and the Ticket Users. Pay close attention to the Ticket Users portion, as it displays if another technician is already reading or perhaps replying to that ticket.

Ticket Vital Signs	
Created:	Wed Oct 19 2005 02:42AM
Due:	Wed Oct 19 2005 02:42PM
Use calendar or enter mm/dd/yy	10/19/05
	2 : 45 pm <input type="button" value="Set"/>
# of Requesters:	1 (edit)
Ticket Agents:	agent1 (browsing)

Customer Support History

The customer support history will show the ticket number, subject, queue and date of any tickets associated with the specific customer of the ticket you are currently working.

Customer Support History		
000012 Test (new)	Support	Wed Oct 19 2005 02:42AM

Ticket Audit Log

The ticket audit log shows the last 5 actions that were performed on the ticket. It shows the date, time, and the action that was performed.

Ticket Audit Log (Latest 5 Actions)	
Wed Oct 19 2005 02:42AM:	Ticket created.

Company/Contacts

If you have companies already set up in your Contacts page, the requesters address may already be assigned to a company. If the address is not assigned, you can view or search through the contacts, or create a new contact for that requester.

Company / Contact	
This address isn't assigned to a contact or company.	
view / search contacts	
create a new contact for john@testcompany.com	

Ticket Thread

The ticket thread itself shows the entire dialogue sent in by the requester and any comments, replies, or forwards done to the initial ticket. As a technician you have a multitude of options ranging from Reply to Print Thread. A more in depth look into these options will be later on in the manual.

Ticket Conversation

[toggle activity threads](#) | [toggle time tracking threads](#)

Wed Oct 19 2005 02:42AM by john@testcompany.com (email)

[[Reply](#)] [[Quote & Reply](#)] [[Quote & Forward](#)] [[Comment](#)] [[More Options...](#)]

Subject: Test
From: john@testcompany.com
Cc: janedoe@testcompany.com
Reply-To: john@testcompany.com
Date: Tue, 18 Oct 2005 18:42:01 -0700

Properties/Ticket Fields

The properties and ticket fields tab allows you to change the Subject, Status, Owner, Queue, and Priority of that ticket.

In the manage requesters and fields, you can change and add requesters to the ticket. You may also suppress certain requesters so that any replies will not be sent to a particular requester.

In the Merge ticket fields, you can combine the correspondence, comments and requesters of multiple tickets into a single ticket id. This can be used in a variety of ways, including consolidating multiple related tickets from a single user or company. When merged, this newest ticket will disappear and all future correspondence will be handled through the oldest ticket.

Ticket #12 Properties

Ticket Subject

Ticket Status **Ticket Owner** **Ticket Queue** **Priority**

Manage Ticket Requesters

Ticket Requesters automatically receive a copy of all correspondence regarding this ticket. Suppressed requesters do not receive ticket updates.

Delete	Requester Address	Suppress
PRIMARY	john@testcompany.com	<input type="checkbox"/>

Add Requester:
(format as an e-mail address, e.g.: customer@company.com)

Merge ticket

Merging tickets combines the correspondence, comments and requesters of multiple tickets into a single ticket id. This can be used in a variety of ways, including consolidating multiple related tickets from a single user or company. When merged, this newest ticket will disappear and all future correspondence will be handled through the oldest ticket.

Merge Ticket # 12 with Ticket #

Anti-Spam

The anti-spam tab shows the spam probability, the training of that ticket as spam/not spam, and the words that factored into the probability rating.

InboxHQ Anti-Spam Measures

40.00%	Spam probability	Training:	Ticket Not Trained
---------------	-------------------------	------------------	--------------------

Ranked "Interesting" Words That Factored Into This Probability Rating

Token	In Spam	In Non-Spam	Probability	Interest Factor
test	0	0	0.4000	0.0000

InboxHQ implements Bayesian filtering to give a probability rating on whether or not a given ticket is spam. A group of "interesting" words are sampled based on their deviation from uninteresting words found in your e-mail, by being either extremely innocent (e.g., your company name) or extremely spammy (e.g., viagra). These words are then ranked by InboxHQ's interest in them, 0 (lowest) to .4999 (highest), and an overall probability is generated. Initially the tokens chosen may seem somewhat random -- this is perfectly normal for increasing the experience base of the filter.

An important part of combating spam with Bayesian filtering is training the filter with both good and spammy e-mail. In the ticket display screen you have the option of training the filter to recognize more tokens of each type of e-mail. The filter is adaptive -- if spammers change their tactics through wording, intentional misspelling, changing URLs, etc. the filter training will help combat it.

After you've trained your filter for a while, you can use a high spam probability (0.90 = 90%) in a new ticket mail rule for various behavior, such as: sorting likely spam into a 'quarantine' queue for later review, automatically deleting spam, etc.

For more information on Bayesian spam filtering, [read through](#) Paul Graham's excellent articles on the subject.

Batch

The batch tab shows any tickets that you have added to your batch queue. In this tab you can do a batch comment or a batch reply to all the tickets in your batch queue.

Log

The log tab is just an expansion of the Ticket Audit Log. Instead of the last 5 you see on the Display Thread tab, you see all actions taken on the ticket.

b. Ticket Functions

By now you've seen many different places in which you can change the status of a ticket without ever reviewing the ticket itself. Now it's time to focus on all the functions you can do while viewing the actual ticket thread.

Reply

The reply button will bring you to a new blank e-mail screen for you to type in your message. You can see the From address which the requester will see who the e-mail is from, the requester's e-mail address that you are replying to, a section in which you can CC (Carbon Copy) the reply to, yet another status section in which you can manipulate the ticket upon working on it, an update type (typically you won't use this unless you change your mind on just replying), and a box in which you can enter how much time you worked on this ticket.

Another Ticket Users line appears, remember to note if someone else is already replying or browsing that same ticket to avoid multiple replies.

Above the text box in which you will be typing the body of your message, there are a few buttons to note: Quote, Insert Signature, Use E-mail Template, Spellcheck, Take Ticket, and Set Resolved.

Update Ticket #12: Test

Ticket Recipients

From Address: support@testcompany.inboxhq.com ▾

Ticket Requesters: john@testcompany.com

Cc: (comma-delimited)
 Add Cc'd E-mail Addresses to Ticket Requesters.

Watchers: none

Status: awaiting-reply ▾ **Owner:** Nobody ▾ **Queue:** Support ▾ **Priority:** Unassigned ▾

Update Type: Reply to Requesters **Time Worked:** (minutes)

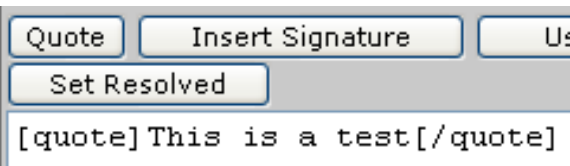
Ticket Agents: agent1 (REPLYING)

Send an Attachment:

Next Step, Go To: Ticket #12 Details ▾

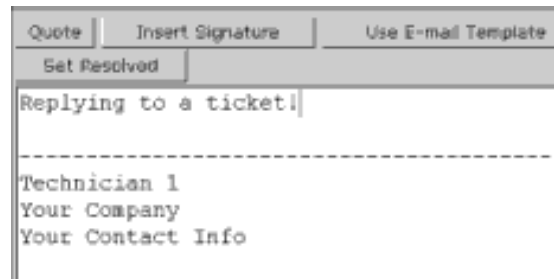
Quote

The quote button automatically inserts the [quote] and [/quote] tags so you can quote text from one of the replies in the review panel. Use this in case you changed your mind from just replying to wanting to reply and quote.



Insert Signature

Depending on your preferences from the dashboard, clicking this button will automatically insert your signature at the top or the bottom of your message body.



Use Template

If you have a response already set up for the ticket you are replying to, click this button to bring up the list of available E-mail Templates your company has set up. You may insert a template at anytime in your message and it will insert itself to the bottom of your message.

E-mail Templates

The template you select will be automatically appended to the end of the e-mail you are currently sending.

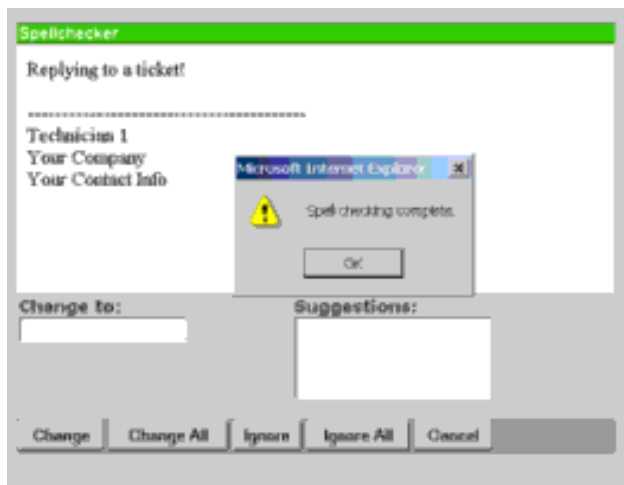
	Template Name	Description
<input checked="" type="radio"/>	Standard Email Response	This is an example of standard email response.

Use Template: Replacing Existing Email Append to Email Prepend to Email

Template Actions:

Spellcheck

We all know that spelling errors are abound while typing. Use this button to spellcheck your message and ensure you have all the correct spellings!



Take Ticket

If you want to automatically assign this ticket to you after working on it, click the Take Ticket button and it will set the Owner to your username.

Set Awaiting-Reply

The set awaiting reply button automatically sets the status of the message to "Awaiting-Reply."

Set Resolved

The set resolved button automatically sets the status of the message to "Resolved." Upon submitting the final changes to the ticket, the ticket will already be resolved.

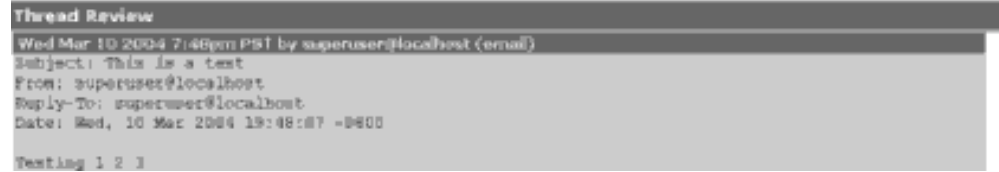
Send an Attachment

Located below the text box you may also attach or remove any attachments to the ticket you are replying to. Clicking the Add/Remove attachment button brings up a browse window for your computer's hard disk.



Finally, you will see a Next Step, Go To: drop down item. From here you can tell the system to take you back to the same ticket thread you just replied to, the ticket listing of the current Queue you are in, the last search you performed, the Batched Tickets page, or back to the home page.

If for any reason you need to refer back to the thread details, the ticket thread review is located at the very bottom of the page.



Quote and Reply

The quote and reply button functions the same as the reply button, however the message you are replying to gets automatically quoted and inserted into the message body area.

Quote and Forward

Quoting and forwarding is similar to quote and replying, however it is used to send the thread response to a 3rd party not listed in the requester fields. You have the same abilities in reply/quote and reply, and no response is sent to the original requester.

Comment

Comments are used for adding information to the thread without actually replying back to the original ticket requester. You have the same abilities as reply and quote and reply, however the message gets added to the thread and no response is sent to the requester.

More Options

Selecting more options will display the remainder of the ticket options you may select from to include:

Forward

Forwarding a message will send off a copy of the message to another address with no chance to edit the message itself.

Bounce

The bounce feature allows you to send an e-mail directly to another address if it is mistakenly sent to you. It will act as if the original e-mail was "bounced" to the destination address to be taken care of.

Strip HTML

In the case that someone sends you an HTML message, you can have the system strip the message of all HTML and save the ticket in its raw form. After hitting Strip HTML, you can preview the change and either Accept or Reject the changes. Note that the system will automatically attempt to strip HTML code from inbound e-mail as it comes in.

Print Message

If you would like to print the ticket thread out for hardcopy purposes, clicking the Print Thread button will bring up a new window and display the printer friendly version of the thread. You may then Print or Close the window.

Add Time Worked

If you are tracking the time a ticket has been worked, you may add the entry by selecting add time worked.

Ticket Conversation

[toggle activity threads](#) | [toggle time tracking threads](#)

Create New Time Tracking Entry

Work Date:	<input type="text" value="10/19/05"/> <small>(mm/dd/yy, show calendar)</small>	5	:	35	pm
Date Billed:	<input type="text"/> <small>(mm/dd/yy, show calendar)</small>				
Work Agent:	<input type="text" value="agent1"/>				
Hours: <small>(for example: 1.5)</small>	Worked: <input type="text"/>	Chargeable: <input type="text"/>	Billable: <input type="text"/>	Payable: <input type="text"/>	
Work Summary:	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>				
					<input type="button" value="Update"/> <input type="button" value="Cancel"/>

4. The InBoxHQ The Dashboard

The dashboard contains many useful tabs for you to optimize the time you spend within the helpdesk. From the preferences to private messages, the dashboard is where you can make many of these adjustments.

a. My InBoxHQ

Within My InBoxHQ you will notice a few things. The first being the calendar with the current month and year, and the current day in bold. The calendar provides you a way to see your ticket worked on history. Just click a day and it will automatically change the screen to show you your history for that day. To the right of the calendar you can view "My Performance." The My Performance area covers your assigned active tickets, your last resolved ticket, and a 7 day activity snapshot. You can list all your active assigned tickets and also go back to your last resolved ticket through the links provided. On the bottom of this page you will see the Tickets Worked History. This shows all tickets that you have performed an action on for the selected day.

My InboxHQ Custom settings for agent1

Dashboard	Preferences	Layout	Notification	Quick Assign/Watcher	Projects/Tasks	Private Messages																																																								
<table border="1"> <thead> <tr> <th colspan="7">< October 2005 ></th> </tr> <tr> <th>Sun</th> <th>Mon</th> <th>Tue</th> <th>Wed</th> <th>Thu</th> <th>Fri</th> <th>Sat</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> </tr> <tr> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> </tr> <tr> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> </tr> <tr> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> </tr> <tr> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> </tr> <tr> <td>30</td> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>							< October 2005 >							Sun	Mon	Tue	Wed	Thu	Fri	Sat							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
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b. Preferences

The preferences tab allows you to set some settings for your GUI and ticket viewing. The first section of the preferences tab is User Preferences. Here you can set how many minutes you would like the GUI to auto refresh itself, whether or not you would like to view tickets with the oldest/newest message first, and what language you would like the GUI to be set in.

My InboxHQ Custom settings for agent1

Dashboard	Preferences	Layout	Notification	Quick Assign/Watcher	Projects/Tasks	Private Messages
Agent Preferences						
Timezone:	(GMT) WETAUTC: London, Dublin, Lisbon, Casablanca, Edinburgh					▼
Using GMT 0. The time is now 01:42AM.						
Auto Refresh GUI Every:	Don't Auto Refresh					▼
View ticket threads with:	<input checked="" type="radio"/> Oldest Message First <input type="radio"/> Newest Message First					
Language:	English					▼
Keyboard Shortcuts:	<input type="checkbox"/> Enabled					

The second section allows you to change your password. You need to enter your current password, your new desired password, and another line to verify your new password.

Change Password	
Current Password	<input type="password"/>
New Password	<input type="password"/>
Verify Password	<input type="password"/>

The third section is where you set your signature for your replies/forwards etc. You have your text body space and then you can set whether or not you would like to place the signature before or after quoted text, and whether or not you want the signature to be automatically placed.

Auto Message Signature	
<pre>----- Technician 1 Your Company Your Contact Info</pre>	
Auto Signature Placement:	<input checked="" type="radio"/> After Quoted Text <input type="radio"/> Before Quoted Text
Auto Insert Signature:	<input type="checkbox"/>
Submit	

c. Layout

The layout tab allows you to customize the home page of your InboxHQ by enabling and disabling modules.

Custom Layout for agent1 (agent1)

Page: Ticket Display

Enabled Modules

- Ticket Properties at a Glance / Ticket Vital Signs
- Customer Support History
- Ticket Audit Log
- Company / Contact
- Ticket Conversation

Disabled Modules

<- Enable

Disable ->

<- Move Up

<- Move Down

Reset to Defaults

Update

d. Notifications

The notifications tab allows you to configure an e-mail that will automatically be sent to you upon certain events such as assignment, or requester reply. You have different tokens that can be placed in the e-mail that gets sent to you ranging from the ticket ID to the requesters e-mail address itself.

My Notification Settings

Here you can set up **notifications** that will send you a configurable e-mail notice when certain events occur, such as a new ticket being assigned to you.

You can use the following tokens in all notification templates:

- ##ticket_id## - Ticket ID or Mask
- ##ticket_subject## - Ticket Subject
- ##ticket_status## - Ticket Status (new, resolved, etc.)
- ##ticket_owner## - Ticket Owner Agent Name
- ##ticket_email## - The Email Body of the Original Ticket Message
- ##queue_name## - Ticket Queue Name (Support, etc.)
- ##requester_address## - The Email Address that Opened the Ticket.

Event: New Ticket

Queues:	Enabled:	Queue	Send to: (comma-delimited email addresses)
(the queues you want to be notified of new tickets in)	<input type="checkbox"/>	Billing	
	<input type="checkbox"/>	Information	
	<input type="checkbox"/>	Other	
	<input type="checkbox"/>	Sales	
	<input type="checkbox"/>	Support	

E-mail Template:

```

=====
NEW TICKET NOTIFICATION
=====
Ticket ID: ##ticket_id##
Ticket Subject: ##ticket_subject##
    
```

Event: Assignment	
Enabled:	<input type="checkbox"/>
Send to:	<input type="text" value=""/> (comma-delimited email addresses)
E-mail Template:	<pre>***** NEW ASSIGNMENT NOTIFICATION ***** Ticket ID: ##ticket_id## Ticket Subject: ##ticket_subject##</pre>
Event: Client Reply on Assigned Ticket	
Enabled:	<input type="checkbox"/>
Send to:	<input type="text" value=""/> (comma-delimited email addresses)
E-mail Template::	<pre>***** NEW CLIENT REPLY ***** Ticket ID: ##ticket_id## Ticket Subject: ##ticket_subject##</pre>
<input type="button" value="Submit"/>	

e. Quick Assign / Watcher

The quick assign/watcher tab allows you to have certain queues automatically assign tickets to you or give you the ability to receive e-mails anytime something happens within a queue. For quick assignment, select the queues you want to have automatically assigned to you and then hit submit. You can also choose how many tickets you want to be assigned to you at once. Watchers receive an e-mail copy of all new tickets and correspondence for the queues you select.

Quick Assign & Watcher Settings

The **quick assign** column below determines which queues will be used by the quick assign feature in the header above. Choose the queues you would like to have tickets assigned to you from. For example: assign from the queues **'Support'** and **'Sales'**, but don't assign from the queues **'Failure Notices'** or **'Virus/SPAM'**.

As a **watcher** you will receive an e-mail copy of all new tickets and correspondence for the queues you select below. A watcher can read and reply to tickets through any e-mail client, or simply use the e-mail messages as a notification to log into the GUI.

Your watcher e-mails will be sent to: <**agent1@testcompany.inboxhq.com**>.

Queue	Quick Assign	Watcher
Billing	<input type="checkbox"/>	<input type="checkbox"/>
Information	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>
Sales	<input type="checkbox"/>	<input type="checkbox"/>
Support	<input type="checkbox"/>	<input type="checkbox"/>

Quick Assign: Don't assign me more than ticket(s) at once.

Submit

f. Projects / Tasks

The Projects/Tasks tab will show all the projects that have been created in your helpdesk. If you do not have the hide completed tasks filter enabled, you will be able to see all current and finished projects in this tab. Depending on the access level that your company has given your group, you may or may not be able to create a new project or task.

Projects

Active Projects				
Project Name	Total Tasks	Incomplete	Complete	Project Manager
				<input type="checkbox"/> Hide Completed Projects <input type="button" value="Filter"/>

Create New Project					
Project Name:	<input type="text"/> (For example: "To Do List" or "Bug Reports")				
Manager:	agent1 (agent1) <input type="button" value="v"/>				
Resources:	<table border="1"> <thead> <tr> <th>Project Members</th> <th>Available Agents</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td> <input type="button" value="<"/> Administrator (administrator) agent1 (agent1) John Doe (john) <input type="button" value=">"/> Super User (superuser) InboxHQ Administrator (XSP) (xsp_dcouncil) </td> </tr> </tbody> </table>	Project Members	Available Agents	<input type="text"/>	<input type="button" value="<"/> Administrator (administrator) agent1 (agent1) John Doe (john) <input type="button" value=">"/> Super User (superuser) InboxHQ Administrator (XSP) (xsp_dcouncil)
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<input type="button" value="Submit"/>					

g. Private Messages

In a busy office environment its hard to communicate with coworkers (whether you are on the phone or your coworker is busy). With Private Messages, you can send and receive messages directly in InBoxHQ Helpdesk. When a new message arrives, it will bring up a pop up on your screen that says you have a new message and it will display who sent the message.

Private Messages in 'Inbox'
No private messages.

Change Folder:

Send a Private Message

To Agent:

Subject:

Message:

5. Anti-Spam

By now you've seen a few instances of the anti-spam features that are provided in InBoxHQ Helpdesk. InBoxHQ incorporates what is known as Bayesian Filtering. Rather than just blocking certain keywords and e-mail addresses themselves, Bayesian Filtering gives a probability rating to show whether or not an e-mail is considered spam. By "training" the system with keywords that are more innocent (e.g. your company name) or more spammy (e.g. viagra), the system learns what is good and bad for your system. So whether your company is the leading publisher of children's books, or a major distributor of Viagra, it is up to you to train the system. So even though one word may be considered spam to you, to another company it may not. After you have trained the system sufficiently, you can then set a mail rule to move or delete spam above a certain probability rating, with little fear that an actual e-mail will get moved accidentally.

InboxHQ Anti-Spam Measures				
40.00%	Spam probability		Training:	Ticket Not Trained
Ranked "Interesting" Words That Factored Into This Probability Rating				
Token	In Spam	In Non-Spam	Probability	Interest Factor
test	0	0	0.4000	0.0000

InboxHQ implements Bayesian filtering to give a probability rating on whether or not a given ticket is spam. A group of "interesting" words are sampled based on their deviation from uninteresting words found in your e-mail, by being either extremely innocent (e.g., your company name) or extremely spammy (e.g., viagra). These words are then ranked by InboxHQ's interest in them, 0 (lowest) to .4999 (highest), and an overall probability is generated. Initially the tokens chosen may seem somewhat random -- this is perfectly normal for increasing the experience base of the filter.

An important part of combating spam with Bayesian filtering is training the filter with both good and spammy e-mail. In the ticket display screen you have the option of training the filter to recognize more tokens of each type of e-mail. The filter is adaptive -- if spammers change their tactics through wording, intentional misspelling, changing URLs, etc. the filter training will help combat it.

After you've trained your filter for a while, you can use a high spam probability (0.90 = 90%) in a new ticket mail rule for various behavior, such as: sorting likely spam into a 'quarantine' queue for later review, automatically deleting spam, etc.

For more information on Bayesian spam filtering, [read through](#) Paul Graham's excellent articles on the subject.

6. Knowledgebase Articles

Knowledgebase Articles can be your best asset in determining a solution to a problem. With InBoxHQ Helpdesk's new Fetch and Retrieve™ Technology, the more the system learns that a knowledgebase article has provided good responses, the more accurate the system becomes.

a. Searching and Listing Articles

The Knowledgebase allows you to search through every article in every category, or you may specify which category you search in. You may also browse a category underneath the search boxes.

Knowledgebase

Cerberus Fetch & Retrieve™ Knowledgebase Search

Try a Keyword Search:

-or-

Ask a Question:

(include as much information as possible using your natural writing style)

-or-

Go to Article ID:

Browse Knowledgebase by Category:

Categories:

[Top](#) : [Support](#)

No sub-categories.

No knowledgebase articles in this category.

[Create a New Knowledgebase Article in 'Support'](#)

b. Creating a New Article

When creating a new knowledgebase category, you will be taken to a new page that will have several fields. The first field, Summary, should be a short description of the problem like "What kinds of payments do you accept?". The next field, Category, is where the article will be located. Your administrators probably have set up a few different categories in which you can place this article. The keywords field should contain relevant keywords to the article, make sure you don't enter common words such as, the, and, or. You may also select whether to make this article Public (available for viewing in the Support Center) or Private (only available in the helpdesk).

The text box containing the 'Description of Problem' will be where you put in a more comprehensive description, as opposed to what you put in on the summary box. Rather than just saying "What type of payments do you accept?" it would now read something like, "Do you accept Visa, American Express, Mastercard, etc etc".

The 'Explanation of Solution' box is where you will type in the resolution to the problem.

Knowledgebase

Create Knowledgebase Article in 'Support'	
Summary:	<input type="text"/>
Entry Date:	Thu Oct 20 2005
Entry Agent:	agent1
Category:	Support <input type="button" value="v"/>
Keywords:	<input type="text"/> (space-delimited)
Article Type:	<input type="radio"/> Public <input checked="" type="radio"/> Private
Description of Problem:	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>
	Text format: <input checked="" type="radio"/> Plaintext <input type="radio"/> HTML Plaintext will automatically hyperlink URLs and preserve wordwrapping. HTML will be passed to the browser directly without additional formatting.
Explanation of Solution:	<div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>
	Text format: <input checked="" type="radio"/> Plaintext <input type="radio"/> HTML Plaintext will automatically hyperlink URLs and preserve wordwrapping. HTML will be passed to the browser directly without additional formatting.
Reset Fetch &	

Reset Fetch &
Retrieve
Training:

No Yes

Submit

c. Commenting on Knowledgebase Articles

Usually as a technician on the helpdesk, you won't need to add comments to a knowledgebase article. Comments are mainly used to allow the public to give feedback on the articles that they are allowed to see.

How Helpful was this Article?

0% 25% 50% 75% 100%

Access:	Private
Category:	Support
Keywords:	test
Entry Date:	Thu Oct 20 2005 08:00PM
Entry Agent:	agent1

User Contributed Comments:

([add comment](#))

No user comments.

Add a Comment

If you choose to leave an e-mail address, your address will be masked to aid in preventing automatic harvesting of e-mail addresses from this system for unsolicited commercial e-mail purposes. user@domain.com will become **user at domain dot com**. You are welcome to add your own spam protection as well, by adding a human-readable spam blocker such as user@NOSPAM.domain.com.

Use this system to append to the current knowledgebase articles, posting notes you feel should be added to current documentation or may assist other users. Please do **not** use the comments system to request support, report bugs or suggest new functionality. There are other avenues for pursuing such items, and offending notes will be removed.

HTML tags are disabled in comments. URLs will automatically be hyperlinked. **All comments must be approved by an editor before becoming visible in the knowledgebase.**

Article Comment

Your E-mail Address
(or Name):

user@domain.com

Comment:

IP Address: 66.63.145.130

IV. FAQ - Frequently Asked Questions

This page includes many frequently asked questions regarding InBoxHQ Helpdesk. If you do not find an answer to your question here, you may also contact our customer care at 1-888-638-4373

User FAQ's

1. What are the different status types and what do they mean?

In the most recent release of InBoxHQ Helpdesk, there are 11 different status types. These include: New, Responded, In Progress, Info Needed, Acceptance, On Hold, Escalated, Fixed, Reopened, Resolved, and Dead.

a. New

The 'New' status is the default status when a ticket comes into the system. It signifies that it is 'New' and generally means no action has been taken upon it yet.

b. Responded

The 'Responded' status is the default status when a reply is sent to the requester. If no other status is set during a reply, a ticket will be marked as 'responded'

c. In Progress

In Progress can be used in a few different ways, depending on the nature of your company. If perhaps a ticket is being worked on but is awaiting a reply from the requester, then you can mark a ticket as 'in progress'.

d. Info Needed

Generally a ticket can be set to 'Info Needed' when a ticket is missing information or perhaps when you are awaiting a response from a requester for information regarding the ticket.

e. Acceptance

Geared more towards sales or accounting purposes, 'Acceptance' means that a ticket is in the stage of being accepted whether for a sale or purchase.

f. On Hold

Geared more towards sales or accounting purposes, 'On Hold' could mean that a ticket is suspended for non-payment or can not be completed to a later time.

f. Escalated

When a ticket is marked as 'Escalated', it means that the ticket has gone beyond the basic means of support and needs higher priority. Usually combined with setting a ticket as 'High' priority.

g. Fixed

When set to a 'Fixed' status, a problem in the ticket is most likely solved, but the ticket is not to a stage where it can be marked as 'Resolved' quite yet.

h. Reopened

When a ticket is marked as resolved and a requester responds, the default status that the ticket will be set to will be 'Reopened'. This just means that the ticket has been reopened by the requester.

i. Resolved

When a ticket is set to a 'Resolved' status, it means that a resolution has been found to the ticket and it no longer needs anymore work done to it.

j. Dead

Generally reserved for clearing tickets or for spam e-mails, marking a ticket as 'Dead' will set the ticket to be able to be removed from the system completely by 'purging' it. The time set for purging dead tickets can be found in the Configuration area.

2. Why do the colors of a status change from red to black or black to red?

The colors reflect who wrote last to a ticket. Black means that the last person to reply/comment on a ticket was staff and Red means that the requester replied.

3. What does batching a ticket do? Merging? Cloning?

When you batch a ticket, you mark the ticket so that you can do a mass reply or comment to those tickets. It saves you time if you have more than one ticket which requires the same answer or comment.

When you merge a ticket, you combine two tickets into one. Useful for when someone sends in multiple tickets or tickets have similar information to them. Merging a ticket will keep the ticket ID of the first ticket that came into the system.

When you clone a ticket, you create an exact duplicate of a ticket and the cloned ticket receives a new ticket ID.

4. How do I search for a specific ticket?

Once logged into the help desk, you can find the Quick Ticket Search section at the bottom of your InBoxHQ dashboard. This section allows you to search for tickets by Queue, Status, content contained within the Requester, Subject or body of the ticket, Owner or Company. You may also search using multiple search items. For example, you can search for a specific ticket in the Billing queue that has a status of Resolved

Quick Ticket Search			
Is in Queue:	<input type="text" value="- any queue -"/>	Status Matches:	<input type="text" value="- any status -"/>
Requester Contains:	<input type="text"/>	Subject Contains:	<input type="text"/>
Content Contains:	<input type="checkbox"/>	Owner Matches:	<input type="text" value="- any owner -"/>
Company Matches:	<input type="text" value="- any company -"/>		
Advanced Search Mode >>			
			<input type="button" value="Search Now"/>

The Advanced Search Mode allows you to narrow your search based on the date the message was created to the latest message.

Dates			
Date Range:	<input type="text" value="Created Between"/>	<input type="text"/>	<input type="text" value="-and-"/>
	<input type="text" value="Created Between"/>	<input type="text"/>	<input type="text" value="(mm/dd/yy)"/>
	<input type="text" value="Latest Message Between"/>		<input type="button" value="Search Now"/>

3. How do I take ownership of a ticket?

From the main screen:

Select the ticket that you want to take ownership of, select the appropriate agent from the Change Owner drop down menu and then select Commit.

Highest Priority Tickets Assigned to agent1 options

all	#	Subject	Wrote Last	Queue	Status	Priority	Due
- Change Status? - <input type="button" value="v"/> + - Change Queue? - <input type="button" value="v"/> + - Change Owner? - <input type="button" value="v"/> + - Perform action? - <input type="button" value="v"/> <input type="button" value="Commit"/>							
(Showing 0-0 of 0)							

Newest Unassigned Tickets in All Queues options

all	#	Wrote Last	Queue	Status	Priority	Age	Due
<input checked="" type="checkbox"/>	My Bike	paula@yahoo.com	Support	new	Unassigned	10d	overdue
<input type="checkbox"/>	Interested in re-selling your Bikes	joe@gmail.com	Sales	new	Unassigned	10d	overdue
<input type="checkbox"/>	Requesting Information on the Product	joey@aol.com	Information	new	Unassigned	10d	overdue
- Change Status? - <input type="button" value="v"/> + - Change Queue? - <input type="button" value="v"/> + - Change Owner? - <input type="button" value="v"/> + - Perform action? - <input type="button" value="v"/> <input type="button" value="Commit"/>							
(Showing 1-3 of 3)							

- Nobody
- administrator
- agent1

Advanced Ticket Search

After assigning the ticket, it will appear in the list of tickets assigned to that agent.

Highest Priority Tickets Assigned to agent1 options

all	#	Subject	Wrote Last	Queue	Status	Priority	Due
<input type="checkbox"/>	000005	My Bike	paula@yahoo.com	Support	new	Unassigned	overdue
- Change Status? - <input type="button" value="v"/> + - Change Queue? - <input type="button" value="v"/> + - Change Owner? - <input type="button" value="v"/> + - Perform action? - <input type="button" value="v"/> <input type="button" value="Commit"/>							
(Showing 1-1 of 1)							

From the Ticket View:

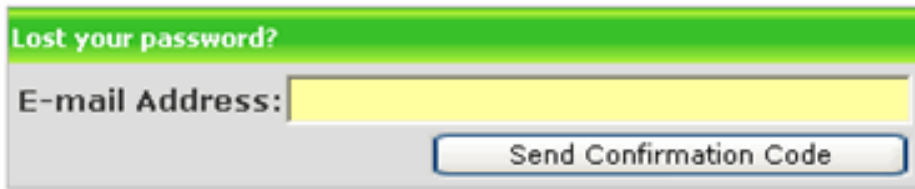
Under Ticket Properties at a Glance, simply select the appropriate agent from the drop down menu under Owner and Update Ticket.

Ticket Properties at a Glance

ID	Status	Owner	Worked	Priority	Queue
12	new	Nobody	0s	Unassigned	Support
40.00% Spam probability (why?) Training: Ticket is Not Spam					
<input type="button" value="Update Ticket"/>					

4. How do I change my password?

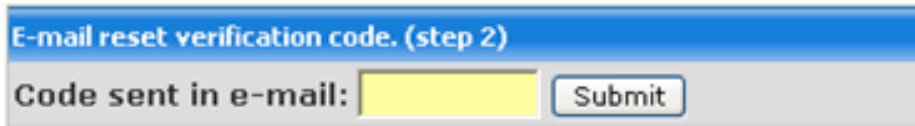
On the login screen, there is an area that you may request your password should you forget it. The first step is to enter your email address that is set to your account. The system will then email you a verification code. You then enter this code in step 2 and your password will be sent to you via email. It is important to enter the proper email addresses assigned to you so that you can receive the "*E-mail reset verification code*".



Lost your password?

E-mail Address:

Send Confirmation Code



E-mail reset verification code. (step 2)

Code sent in e-mail:

Submit

[Return to Login Form](#)

9. How do enable the advanced options InboxHQ?

In the most recent release of InBoxHQ Helpdesk, there are 11 different status types. These include: New, Responded, In Progress, Info Needed, Acceptance, On Hold, Escalated, Fixed, Reopened, Resolved, and Dead.

10. How do retrieve my lost password?

In the most recent release of InBoxHQ Helpdesk, there are 11 different status types. These include: New, Responded, In Progress, Info Needed, Acceptance, On Hold, Escalated, Fixed, Reopened, Resolved, and Dead.

IV. FAQ - Frequently Asked Questions

This page includes many frequently asked questions regarding InBoxHQ Helpdesk. If you do not find an answer to your question here, you may also contact our customer care at 1-888-638-4373

Admin FAQ's

-in progress

Glossary

This is a quick reference for many of the terms in the manual and their definitions.

D

domain

An example domain name is: www.nethere.com

F

FQDN

Fully Qualified Domain Name

H

helpdesk

Helpdesk is a generic term referring to a customer support center that facilitates interaction between customers and customer service.

K

knowledgebase

The knowledgebase contains an archive of solutions to previous problems. It can also hold answers to frequently asked questions. Knowledgebase items detailing problems and their solutions are called articles. Articles can be marked as private (internal use only) or public. A InBoxHQ Helpdesk Public Knowledgebase Interface can be set up easily on your company's web site to provide a self-help avenue for your customers.

O

owner

Tickets usually have one owner. An owner is responsible for seeing that the requestor of a ticket receives enough assistance to resolve their issue (ticket).

P

pipe

To pass from the output of one application to the input of another application.

Post Office Protocol (v3) (POP3)

Defined in RFC 1081. POP3 allows a client computer to retrieve electronic mail from a POP3 server via a TCP/IP connection.

Q

queue

Queues process incoming and outgoing e-mail and are usually used to separate correspondence for a specific department. Example queues are: Billing, Support & Sales.

R

requester

The requester is a person who opens a ticket. In the case of a User opening a ticket for a customer (i.e. by phone or other means) the requester is the user requiring support.

T

thread

Threads are a string of responses to a particular message. This term is used in InBoxHQ Helpdesk to encompass all messages gathered under a single ticket.

ticket

Tickets are a way of grouping correspondence regarding a particular issue. Incoming tickets are sorted into queues. The multiple messages gathered under a single ticket are called threads. Example tickets are: support trouble tickets, sales lead tickets & billing inquiries.

U

user

Users have a login and password to enter the system. They are typically staff members with daily duties to perform -- be it technically supporting your customer base, overseeing all correspondence with customers, answering billing inquiries or multiple other tasks.

W

watcher

A watcher is a support user who gets a copy of every email to his email client for the queues he is a watcher. He can then respond to those emails he receives and send them back to the Helpdesk. The helpdesk will save them into the database and send the watchers response on to the requester.