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## Welcome!

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### Getting Started

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Welcome!

Welcome to the TeamSupport documentation center! TeamSupport is the leading customer support and helpdesk solution for B2B technology companies and we pride ourselves in the support we provide to our customers.

Another great resource we offer is help directly from the application – You can go to the upper right corner in the TeamSupport app and select to either chat with our support staff or go directly to our Support Portal.

Ready to get started?

Is this a new account? Visit the Getting Started section.
Are you a new user? Visit the Quick Start User Basics section.
Advanced User? Visit the Advanced User Functions section.
Want to see more of what's under the hood? Visit the Advanced Admin Functions section.
Expand your knowledge with Big Picture Topics

Thank you for using TeamSupport, and we look forward to working with you!

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Getting Started

5 Minute Tour

Each new account includes preconfigured settings to help new trial users quickly get a general understanding of how TeamSupport works. You are welcome to use these settings – but more importantly you can change them.

Ready to Get Started?

Decide on a browser, or learn about Mobile App.
Log in
Setup your email
Setup Users
Setup Groups
Setup Customers
Customize your account
Learn about your Customer Hub
Create your First Ticket
Test with a Sandbox Account

What's Next?.

Need Help?

Visit the Help Center page.

Thanks for using TeamSupport!
Browser Support

We support the current versions of Chrome, Firefox, Safari, Internet Explorer 11, and Edge.

Previous versions of all browsers, for example IE 7-10 are not supported.

Click here to troubleshoot browser issues.

We also have a Mobile App.

What’s Next?

Log in

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Web Browser Notifications

TeamSupport leverages your browser’s “Web Notification” feature for in-app notifications like ticket updates and new chat requests. Currently, there are browser notifications for ticket updates and new Customer Chat requests. See below on how to enable/disable these notifications at any time.

**Ticket Notifications**

Very often you will need to open more than one ticket at a time. TeamSupport allows you to multi-task by displaying all of your recently opened tickets (and other objects) along the top of your screen.

When you log out, these tickets will still have shortcuts, but they may not be “loaded”. For a ticket to be “loaded”, you must have viewed the ticket since your last browser refresh/reload. If another user updates one of your “loaded” tickets, you will receive a browser notification indicating that an update has been made.

**Customer Chat**

If you are signed in as a chat user, you will receive browser notifications when a new chat is initiated by one of your Customers. Click [here](#) to learn about the entire Customer chat process.

**Enabling Browser Notifications**

The first time you receive a browser notification, your browser will prompt you to accept/block these notifications. You only need to click the “Accept” button once for both ticket update and Chat notifications.

**Disabling Browser Notifications**

Here are steps for each of the main web browsers to turn off TeamSupport browser notifications:
1. Go to the Firefox menu New Fx Menu and select Options.
2. Select the Content panel and click the Choose… button under Notifications.
3. Select the site.
4. Click Remove Site.
5. Highlight the TeamSupport URL, select Remove Site and then select Save Changes to save
On your computer, open Chrome.

1. At the top right, click More More and then Settings.
2. At the bottom, click Show advanced settings.
4. Under “Notifications,” choose one of the Manage exceptions
5. Highlight the TeamSupport URL and select the “X” beside it. Then select Done to save

![Notifications exceptions](image)

1. Click on the More icon in the top right corner of Edge
2. Select Settings
3. Under Advanced Settings, select View advanced settings
4. Under Notifications, select Manage
5. Turn the On/Off switch to Off for the TeamSupport URL
Choose Safari > Preferences, click Notifications, find the TeamSupport website in the list, then select Deny for it.
Logging In

2. Your email address is your user name.
3. If you have multiple accounts with your email address, you will be asked to select which account you would like to log into. Depending on your log in method, this may be a drop down menu, or a list of choices.
4. Enter your password. Passwords are not required for Single Sign On users.
5. If you want the system to remember you on this computer, check the “Remember me” box before pressing Login. Note that we do not recommend this when using TeamSupport on a shared or public computer.
6. Forgot your password? Select the “Forgot your password” link and the system will generate a new password and email it to you. Click here to learn more.

What’s Next?

Setup your email
Passwords

Protecting your data has always been a major priority for TeamSupport. We have multiple ways you can increase security on your account in order to provide the highest level of security possible.

1. **New Users**: New users will receive an email containing a temporary password. Users may contact their Administrators if they have not received this email. Upon logging in with your temporary password, you will immediately be asked to reset your password.

2. **Strong Passwords**: TeamSupport users are required to have a secure password that is at least 8 characters, must contain a capital letter, and must contain a number.

3. **Password expiration**: Passwords can be set to expire after a certain number of days.

4. **Failed Attempts Lockout**: Users will be locked out of their accounts after 10 failed login attempts. The lockout lasts 15 minutes, or users can reset their passwords (see below).

5. **Two Step Verification**: If your Administrator has turned on Two Step Verification, you may also need to verify login by inputting your cell phone number and supplying a verification code when logging in from a new computer. If your phone number changes, or if a user inputs the incorrect cell phone number, it can be changed in the user settings.

6. **Resetting Passwords**: Users always have the option to reset their password from the login screen by clicking on the “Forgot your password?” link. Administrators can also reset passwords for other users from the user settings. In these cases, a new temporary password will be emailed to the user and will require a new password to be entered immediately upon logging in. Additionally, if already logged in, users can immediately reset their passwords from within their user settings.
Email Integration

How it works – High Level:

When your customer (or anyone) sends emails to your support@yourcompany.com address, it will create a new ticket. The sender will get an auto reply confirming receipt, and your team will get an email letting them know a new ticket has been created, by who, and what they had to say.

When your customer or team members get the confirmation email, the Ticket number will be in brackets in the subject line. This is how we know which ticket to update when someone replies to the email. When someone replies to these confirmation/update emails generated from your account, their reply will be added as a new Action on the ticket in question.

Click here for setup instructions. Email Integration Setup

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Email Integration Setup

To setup the Email integration, you will need to go to the Admin -> Email tab.

Simply forward your company’s support address (or another department/group email address) to the system email address in your account. When emails are received, they will either create new tickets, or update existing tickets.

* Forwarding is typically done by having your IT Manager add an “Email Forwarder” at the hosting level of your email/website account. If you use Outlook/Exchange Server, or similar technology, you will want to setup “Message Redirection” so that the email simply gets sent on to the TeamSupport address without any manipulation.

Place your company address that you forwarded into the “Organization Reply To Address”. That way, when TeamSupport sends emails, it will insert your address on the FROM line and complete the loop.

What’s next?

Setup Users

Click here for more on Email Integration
More on Email Integration

Ready for more?

Click [here](#) to read more about Advanced Email Integration options such as Tagging Emails in the subject lines, adding Alternate Email Addresses, and Customizing Outgoing Emails.

*TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click [here](#).*
Setup Users

The users section of TeamSupport is where you define who can use the product – These are the internal users (your staff) and not your external customers.

Get started here by Adding a New User.

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Add a New User

To add a new user you will need to click on User from the left hand navigation from within TeamSupport.

Click the Add button. This button is only available to system Admins.

Then fill out the form. There are 3 required fields on this form: First Name, Last Name, and Email. We also recommend that you leave “Active” and “Email new user a password?” checked.

What’s Next?

User Properties
User Properties

Once the user has been added, you will see the User Properties section. Users can upload an image to their account. Anything with blue text can be clicked on for edit and saves in real time.

You should indicate whether this user will be a “System Administrator” for your company. System Administrators are allowed to make system changes in your account. Non admins are also disallowed from deleting tickets, and do not have access to the History tab in the Users section.

What’s Next?

User Menu Items
User Menu Items

TeamSupport customer support software lets you restrict what sections of the application each user has access to. This can be done for security reasons (ie you don’t want all of the users to see the customer section) or simply to make the user interface have fewer options for agents who just need to log support tickets. In either case, restricting what a user can see is controlled by the “User Menu Items” section of the Users page (pictured below).

Simply uncheck the menu items that you want the user to NOT have access to and the next time they log in or refresh the browser, these sections will no longer be visible.

What’s Next?

Click here to setup Groups

Click here for more on user setup
More on User Setup

Ready for more?

Click here for advanced User Setup options such as Changing your Password, User Ticket Rights (security) and Email Ticket Notifications.

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Setup Groups

Groups are a way to organize Users. Generally this is used to define departments or teams within your company such as “Customer Support Tier 1”, “Developers”, “Billing”, etc. A user can be a member of more than one Group. It’s important to note that Groups are used for a number of things within TeamSupport including ticket assignment, user rights, and even notifications in the WaterCooler.

Get started here by Adding a New Group.
Add a New Group

To add a new Group, click on Groups from the left hand navigation from within TeamSupport.

Click the + (plus) button in the upper right hand corner.

• **Name**: The name field is required. This value will be visible through TeamSupport and may also to your Customers on the Hub/Portals and in email.
• **Description**: The optional field describes the Group you are creating. This field is not available for Customers to view.
• **Product Line**: The optional field will allow you to tie a Product Line to your Group. Click [here](#) to learn more about this advanced feature.

Click the “Group Information” tab, and then click “+New User” button to add an existing user to the group.

[Add User](#)

Please Note:

• You can add any number of users to a group.
• Users can also be members of multiple groups – which is perfect for those wearing multiple hats!
• When a user is a member of a group, and a ticket is assigned to that group AND not yet assigned to a user, all members of that group can be notified with an email.
• To remove a user from a group, click the trash button next to the users name.

What’s Next?

Click [here](#) to setup your Customers

Click [here](#) for more on Group setup
More on Group Setup

Ready for more?

Click here to learn about Working with Groups such as setting up a default Group, limiting which tickets can be viewed by group assignment, and automatically routing tickets to Groups.

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Setup Customers

The Customers tab is where you can define who your customers are, what Products and Versions they are using, and attach important files and activities.

Get started here by Adding a Customer.
Add a Customer

To add a new customer, click Customers from the left hand navigation. Click the New Customer button.

Select the “New Company” tab, fill out the form, and click save. The only required field is “Name”. We recommend you leave Active checked. The screenshot below includes Custom Fields, which you can customize for your account.

![Customer Information Form](image)
Additional Information

- Default Support User: Unassigned
- Default Support Group: Unassigned
- Service Agreement Expiration
- Service Level Agreement: Unassigned
- Support hours per month: 0
- Active: ✓
- Portal Access:  

Custom Fields

General Info (Custom Category)

- Customer Type: Business
- Annual Revenue
- Status: Pick One
- Contract #
- Acct# Pin Preference
- Trial Expiration: mm/dd/yyyy
- Payment Status: Pick One
- Plant Location: Select Plant
- License Expiration Date: mm/dd/yyyy
To add a Contact to your new Company record, open the Company and click the contact tab. Then click the Add Contact button.

![Add Contact button]

Fill out the form and click save. Required fields are “First Name”, “Last Name”. We recommend that you leave Active checked. You may add as many contacts per company as required.

![Contact form]

You can add custom fields to the customer so that you can track information unique to your organization. See Custom Fields for more information on this.

What’s Next?
Click [here](#) to add a “Test Customer” so you can see the system from a customers prospective.

Click [here](#) for more on the Customer setup.
Add a Test Customer

We recommend you add a “Test Customer” using your personal email address (i.e. gmail, verizon, etc.). This will allow you to experience the system as your customers will via email and the Customer Hub.

If you haven’t added a customer yet – read this page first.

To add a Test Customer create a Company with the name of “Internal”, or something similar. Be sure to check “Active” and “Portal Access” for this customer.

For the contact, be sure to use a different email address than what you are using as your “User” from within
TeamSupport. Be sure to check “Active”, “Portal User”, and “Email contact a password to the hub”.

To create a ticket using your Test Customer, send an email from your Test Customer email address into your “System Email Address” in TeamSupport. The “System Email Address” can be found by going to Admin->Email->System Email Address. See screenshot below.

To access your Customer Hub using your Test Customer, use the “Landing Page URL” which can be found by going to Admin->My Portal->Customer Hub Settings->Landing Page. See screenshot below.
What's Next?

Click [here](#) to start Basic Customization.

Click [here](#) for more on Customer setup.

Click [here](#) for Customer Hub.
More on Customer Setup

Ready for more?

Click here for Advanced Customer Setup options such as adding Domains, and selecting Default Support Groups and Users.

Using a CRM such as Highrise or Salesforce? Click here to learn more about our native Integrations and API.
Basic Customization

Although TeamSupport is pre-configured with very useful defaults, there are many opportunities for customization.

Here are a few to get started with:

- Setup Ticket Types
- Setup Custom Fields
- Setup Other Custom Properties
Setup Ticket Types

You have the ability to define what types of tickets you need to manage within your operation. We pre-configure a few types to help you get started, however these may be changed to what you need. You can always edit the name of the Ticket Types later. You can also “retire” a Ticket Type by marking it not active.

To setup your Ticket Types, from the left hand navigation click on Admin->Custom Properties tab-> then select Ticket Types from the “System Property type” drop down menu.

The first ticket type in the list is the default. Here you can edit, delete and re-order how your ticket types appear. To Add a new ticket type, click the “+ Add” link.

What’s Next?

Setup Custom Fields
Setup Custom Properties
Setup Custom Fields

The Custom Fields section allows you to create fields unique to your organization for a handful of areas including Tickets, Users, and Customers. Each of these different areas in the application can have as many different custom fields as you want.

To add/edit custom fields, go to Admin -> Custom Fields Tab.

Simply select the field type where you want to modify the custom fields in the “Field Type” pulldown. If you choose Ticket, a second pulldown for Ticket Type will appear.

To add a category, click “Add Category”. You can always rearrange the custom fields into categories by dragging and dropping. To add a custom field, click “Add Custom Field” and the following form with appear.
<table>
<thead>
<tr>
<th>Name:</th>
<th>Billable?</th>
</tr>
</thead>
<tbody>
<tr>
<td>API Field Name:</td>
<td>Billable</td>
</tr>
<tr>
<td>Parent Field:</td>
<td>Unassigned</td>
</tr>
<tr>
<td>Parent Product:</td>
<td>Unassigned</td>
</tr>
<tr>
<td>Field Type:</td>
<td>Pick List</td>
</tr>
<tr>
<td>Pick List Values:</td>
<td>(Required at Closing)</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

- The first value is not a valid selection for a required field.
- A value is required
- A value is required prior to closing ticket

The required fields on this form are Name and Field Type.

What's Next?

Setup Custom Properties
Setup Other Custom Properties

For additional customization, from the left hand navigation click on Admin -> Custom Properties tab -> then make your selection from the “System Property type” drop down menu. To Add a new value, click the “+ Add” link. Name is the only required field for all of these areas.

Each area has pre-configured defaults to help you get started, however these may be customized to what you need. Here you can edit, delete and re-order how your values appear.

* Please Note: When editing “Ticket Statuses” you must also make a “Ticket Type” selection.

What’s Next?

Click here to learn about your Customer Hub

Click here for more on Customization
More on Customization

Ready for more?

Some other popular customizations include adding Workflows, Ticket Automation triggers, and SLA’s. These can be found in the [Advanced Admin Section](#).

*TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click [here](#).*
The TeamSupport application helps your team to provide exceptional customer support. TeamSupport also offers an extension of the application, called the Customer Hub, which provides a self-service resource area for your customers to manage their tickets and find answers to their questions. Your customers will be able to submit tickets, manage their tickets, manage their organizations tickets, view Knowledge Base and Wiki articles, engage in a forum called Community, and initiate Chats with your Support team. Enterprise customers also have the ability to create multiple Customer Hubs.

Click [here](#) to learn how to use and configure your Customer Hub(s).
More on Customer Hub

Ready for more?

Click here to learn more about customizing Customer Hub such as setting up CName, Wiki, My Products section, and Suggested Solutions.

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Create your First Ticket

There are many ways a new ticket can be created automatically. These include via email, the Customer Hub, a CRM integration, and from our API.

You can also create a ticket manually by clicking on one of the following New Ticket buttons.

Click “New Ticket” from the main screen next to the TeamSupport logo:

If you click the New Ticket button while you have a Company or Contact selected, they will be associated with the ticket. First click open the Customer from the Customer section, then click on the Tickets tab.

The only default required field is Ticket Name. If you would like the ticket to be visible to the customer associated with the ticket, check the “Visible” box. Otherwise, leave it blank and only TeamSupport users will be able to see the ticket.

I created my first ticket! What’s Next?

Test the system using a Sandbox Account

Click here for more details on creating a ticket.
Test in a Sandbox Account

If you would like to have a test account – you can setup a Sandbox Account.

This will allow you to:

• Work in a testing environment
• See the emails that we send out of TeamSupport
• Setup Ticket Automation Triggers
• Customize Email Templates and design of Customer Hub
• Access the Customer Hub from your customer’s perspective

All of this can be done without worrying about affecting your main account.

To setup a Sandbox Account, visit www.teamsupport.com and click on the “Try it Free” button. Fill out all of the fields the same as you did for your main account with the exception of “Company”. For the “Company” field, use your company name ending in “-Sandbox”. For example – “J4 Inc. – Sandbox”.

When you log into TeamSupport the next time, after you type in your email address, a box will appear which will allow you to choose which account to log into.

Company:
BitsAndBytes.com

Remember me on this computer

Login Visit Mobile Site

That was fun! What’s Next?
What’s Next?

You’re finished with the Getting Started Section…

What’s Next?

Click here to learn the basic day-to-day tasks of a typical support software user.
Click here if you would like to see a bit more of what is under the hood.
Click here to expand your knowledge with Big Picture topics.

Need Help?

Visit the Help Center page.

Thank you for using TeamSupport!

TeamSupport is a leading customer service software solution. For more information on how TeamSupport can help improve your helpdesk, please click here.
Quick Start User Basics

First you'll need to log in.

What's Next?

Basic Workflow
Explore your Dashboard
Explore the Customer Section
Create your first ticket
Manage your tickets
Search
Make a Post on the Water Cooler

Ready for More?

Click here for Advanced User functions.
Basic Workflow

Every organization is different. Your TeamSupport account has a lot of default settings to give you a turn-key customer support solution. Additionally, you can customize the settings and workflow to meet the unique needs of your organization. Here is an example of a common workflow for an incident request. This example assumes you have already done the setup outlined in the Getting Started section of this manual.

Workflow diagram

Click here to download a diagram of a basic workflow.

Workflow in steps

Below are some steps that are included in a basic workflow:

1. Chris with Company XYZ sends an email to support@yourdomain.com.
2. A new ticket gets created, is given a ticket #, is associated to both Chris and Company XYZ, and is assigned to the Support Group.
3. Support reps who are members of the Support Group get an email letting them know that a new ticket has arrived.
4. Chris receives an automated message thanking him for his submission.
5. One of the Support reps who is a member of the Support Group, Kimberly, sees on her Dashboard that there is a new ticket in her group. She takes ownership of the ticket.
6. Kimberly has a question for Chris, so she creates a visible action for Chris, and changes the status of the ticket to “Pending Customer Reply”.
7. That action sends an email to Chris with the question from Kimberly. There is a link in the email to the Customer Hub which Chris follows and posts a new action for the ticket.
8. The response from Chris updates the ticket status to “Customer Replied”.
9. Kimberly receives an email that her ticket has been updated. She also sees this update on one of her Dashboard Reports. Her My Tickets grid also shows that she has a ticket that has an unread action.
10. Chris’s response has indicated that Kimberly has resolved his issue. Kimberly adds another visible action thanking Chris and indicating that she will close the ticket. She changes the status of the ticket to Closed.
11. Chris receives an email indicating that the ticket has been closed.
12. The ticket is automatically moved from Kimberly’s Open ticket tab to the Closed ticket tab within the My Tickets section.

These are just examples of a support ticket workflows. There are numerous possible variations to this workflow including the ticket source, ticket routing, action visibility, ticket reassignment, and automated updates through Ticket Automation.

Click here to learn more about customizing TeamSupport for your specific workflow.
Dashboard

When you first log in to TeamSupport you are taken to the dashboard. The contents of the dashboard include:

- **“New Ticket” Button** – Brings up the new ticket form.

- **Quick Ticket Search** – You can search by ticket name or ticket number and a list of matching tickets will be displayed in the pulldown after 4 characters have been entered. You may use the asterisk * as a wild character to display results when using fewer than 4 characters or when you have incomplete characters. Clicking on one of the tickets will open it up into a new tab. For more advanced searching you can also use the Search button on the left.

- A pie chart which shows the user how many tickets they currently have open and a few other reports to help you get started.

- Other types of default reports displaying data from your system.

Dashboards are user specific. All customizations are personal preference and no other user can change them for you, or be affected by your changes.
• You can customize the view of the dashboard to your liking. You can add any report you have defined in the reports section into the dashboard just by clicking the “Add Report” button in the upper right. You can also move around the reports and graphs, edit the width and height (small, medium, large), or get rid of them by clicking the x.

• You can drag and drop columns to reorder them. You can also change the sort order by clicking on the column header from the Dashboard report.

• You can hide/unhide series from being displayed in the graph by clicking on the series in the legend.

• By clicking on the blue link for Ticket Name or Ticket Number, the ticket will open into a new tab for editing.

You will also notice multiple ticket tabs across the top. TeamSupport allows you to open multiple tickets, making multi-tasking easier for each user.

What’s Next?

Manage your Tickets
Customer Basics

The Customers tab is where you can define who your customers are, what products and versions they are using, and attach important files and activities.

The picture below displays a list of your customers. From here, you can define the specifics about each customer.

To add a new customer, click the New Customer button and fill out the form. You have the choice to add a Company, or just add a Contact without a company affiliation. When clicked, the following form will appear:
To add contacts to a customer record, click the contact tab. Here we have the option to add as many contacts as desired, and their individual information.
To see the tickets that are associated with the customer record, click the tickets tab. This will show the customer's tickets broken down into sub-tabs.

### What's Next?

Click [here](#) for more advanced Customer Section options.

Click [here](#) for a Basic Support Workflow.
Manage your Tickets

Haven't created your first ticket yet? You can do that [here](#).

Tickets are the major component of TeamSupport. There are two main areas to Edit/Manage your tickets:

- [Ticket Detail Tab](#)
- [My Tickets Grid](#)

What's Next?

Click [here](#) for More on Managing your Tickets.

Click [here](#) for Search Basics.
Ticket Detail Tab

When you open a new ticket, a new ticket detail tab will open. You can multitask by having multiple tabs open at once for tickets, customers, and reports.

- The Ticket Detail tab will show all correspondence from Customer and Agents in the white action boxes.

- On the right you will find all of the information for the ticket including user assignment, group assignment, ticket type, ticket status, severity, and Customer association.

Click the public/private action links to add a new action. The new action window will be displayed.
Click Save to save the action, or click the arrow next to Save to change the status along with the save.

Here you can create a new action for yourself, other TeamSupport Users, or for your Customers. Talk about collaborative customer support!

If the action is visible, TeamSupport will send all customers associated with the ticket an email with your new action. They will also be able to see this action on the Customer Hub.

Click here to learn more about ticket visibility.

What’s Next?

Click here to learn about the My Tickets section.
My Tickets Basics

The “My Tickets” grid has lots of tools to keep you on track, organized, and efficient. Here are some common “My Ticket” options:

- The number in parenthesis after “My Tickets” indicates the number of your tickets that have new unread actions.
- The “Open Tickets” tab shows all of the tickets that are assigned to you.
- If you click on a ticket, a preview will be displayed in the bottom viewing pane.
- To open a ticket, click on the green arrow, or double click the ticket.
- To create a new ticket, click the “New Ticket” button.
- You can choose which columns you would like to be displayed by clicking the “Select Columns” button, drag and drop to reorder columns, and sort columns in either direction by clicking on the column header. All customizations in the My Tickets section are user specific and will be saved for the
next time you log in.

Click [here](#) for a more detailed description of the My Tickets section.

**What's Next?**

Click [here](#) to learn more about Managing your Tickets.

Click [here](#) to get familiar with Searching.
More on Managing your Tickets

Click here for more on Managing your Tickets, including Tips and Tricks for managing your tickets, and advanced user functions.

Click here to read about “Web Conversations” which allows you to get out of the e-mail inbox for managing support issues.
Search Basics

TeamSupport offers a powerful search tool which allows you to find Tickets, KB articles, Customers, and Contacts quickly. You can also perform advanced filters and sorting to better narrow down your search.

Advanced Search

• Search Bar: Type your word or words into the search bar to return your results.
• Tickets, KB, Customers, Contacts Buttons: Click the area of TeamSupport where you would like to search. The default is Tickets.
• Results: Results are displayed with Ticket Number, Ticket Name, Date Created, Date Modified, and Status. You can click on any result, and it will open in a new tab.
• Switch to Classic Search: This button will allow you to toggle between Classic Search and the New & Improved Advanced Search.
• Sort By: The default is Relevance. The drop-down menu will display other options by which to sort the results.
• Filters: Filtering is optional. Add a filter by clicking in the “Add a Filter” box. Once a selection is made, you will have the option to define your search criteria. You may add multiple filters to a single search by clicking again in the “Add a Filter” box. When you add a filter, the results will update automatically.

What’s Next?
Click [here](#) to learn Advanced Search options.

Click [here](#) to make a post on the Water Cooler.
Make a Post on the Water Cooler

The easiest way to think of the Water Cooler is as a Facebook-type social network that only people in your company can access. You can post questions, have conversations, and even chat one on one with your colleagues. Basically, it’s a way for you to collaborate more closely within your company to better support your customers.

Click the Water Cooler section on the left hand navigation.

You can chat with other TeamSupport users who are logged in by clicking on their name on the right hand side of the screen under “Online Chat”

Click on the box that says “Share to Watercooler” and the following menu will appear.

- Simply type in a comment or question, and click the “Post” button
- To associate a ticket to the post, click the ticket icon and search by either name or number
Any user can hover over the “Info” icon on the upper right hand corner of the post to see all associations, and can open them by clicking on the link.

### What's Next?

Click [here](#) to learn more about Advanced Water Cooler options.

Click [here](#) to learn about the basics of the Customer section.
More User Functions

Ready for More?

Click [here](#) for Advanced User functions such as advanced Ticket Functions, Knowledge Base, and User Account settings.

Click [here](#) for Advanced Admin Functions such as advanced Custom Fields, Customer Hub customization, and Ticket Automation setup.

Click [here](#) to explore Big Picture Topics such as ways to Collaborate in TeamSupport, Web Conversations, and E-Mail Best Practices.

Need Help?

Visit the [Help Center](#) page.
Advanced User Functions

If you are a basic Support User, you might find all you need in the Quick Start User Basics section.

Browse this section for Advanced User topics such as:

- Home Screen Navigation
- Dashboard
- Ticket Functions
- Ticket Tags
- Knowledge Base
- Community
- Wiki
- Search
- Customer Chat
- Water Cooler
- User Account Settings
- Groups
- Customer Functions
- Product Section
- Inventory Section
- Reporting & Metrics

What's Left?
What do all the buttons on the top do?

Field Definitions

Top Row

- **“New Ticket Button”** – Click this button to open a new ticket
- **“Quick Ticket Search”** – You can search by ticket name or ticket number and a list of matching tickets will be displayed in the pulldown after 4 characters have been entered. You may use the asterisk (*) as a wild character to display results when using fewer than 4 characters or when you have incomplete characters. Clicking on one of the tickets will open it up into a new tab. For more advanced searching you can also use the Search button on the left.
- **“Chat Status”** – This shows whether the logged in user is available to chat with a customer. Toggle this button between Online and Offline.
- **“Office Status”** – This allows each user the option to notify others of your office availability. This is generally used to let people know if you are out of the office on a business trip or vacation. There is also a message box where users can write a brief note about what they are working on, or any other message they would like displayed next to their name in the User list. For example, if you are on a sales trip you could choose “Busy” as the status and type “On sales trip to see Client XYZ” in the text box. You can also use this as a generic status box to update what you are working on. You may use [Ticket Automation](#) to take action on a ticket based on the status of the assigned user.
- **“Help”** – Contains help tools including: Documentation (redirects to our help site), Chat with us (initiates a chat with TeamSupport Staff), and Support Portal (signs you in to the TeamSupport Customer Hub where you can submit and manage your tickets, and browse our Knowledge Base).
- **“Sign Out”** – Logs the user out of TeamSupport and returns to the login page.

Bottom Row

- **“Current navigation”** – shows which section on the [left hand navigation](#) you have currently selected
- **“Opened Tickets, Customers, and Reports”** – To make it easy to multi-task, each time you open a Ticket, Customer, or Report, a new tab will open along the top of the screen. You can drag and drop these tabs to rearrange. You can also hover over them and click the X to close the tab. There are also browser notifications for updates that may take place by another users while you have a ticket “loaded”. You will not receive browser notifications for all tickets that are opened in a tab – only those which you have accessed since your last browser load/refresh.

What's Next?
Click [here](#) to explore the left hand navigation.
What about all of the icons on the left?

The left side of the application displays a list of navigation buttons which direct the user to the specific area of interest. The available buttons will depend on the version of TeamSupport you are using. In this display, you can see everything available in the Enterprise edition. Some options in the screenshot below will not be available in the Support Desk edition.

Please note – The left hand navigation can be customized per user to show/hide any of the following sections. Click [here](#) to learn more about user display options.

- **“Current Navigation”**: Displayed just above the navigation bar, it changes to show which section on
the left hand navigation you have currently selected.

- **Getting Started**: Some basic tasks to get started using TeamSupport.
- **Dashboard**: The Dashboard is where you can put tables and graphs to show critical information in your TeamSupport account.
- **My Tickets**: My Tickets is a grid which shows tickets that are assigned to you or are in your group. The number in parenthesis next to “My Tickets” is the total number tickets assigned to you which have unread actions. You can expand down the My Tickets section to reveal Ticket Views that are visible only to you.
- **All Tickets**: As the name implies, this grid shows all tickets in the system. The top menu allows you to display just tickets which are open, closed, unassigned (do not have a current owner) or all tickets. You can expand down the All Tickets section to reveal Ticket Views that are visible to everyone.
- **Ticket Types**: A submenu under All Tickets (click on the little triangle to see them) will show each of the ticket types you have in your instance of TeamSupport. Clicking one of them will show only the tickets from that ticket type. Click here to learn more about customizing Ticket Types.
- **Tasks**: An Enterprise edition only feature. Tasks allow you to manage tasks for yourself or for other team members from a single ticket.
- **Ticket Tags**: Another way to classify tickets is to tag them, and this section of the application will let you find tickets that have been tagged.
- **Knowledge Base**: The Knowledge Base is a great way to organize commonly referenced tickets into one portion of the application.
- **Community**: Please note: Community will appear when you enable Community in the Admin section. Community is a forum accessible from the Customer Hub that will allow your customers to interact with each other, and also with you.
- **Wiki**: Wiki allows you to collaborate on articles which include images and documents that can be shared internally in your organization, externally via the Hub, or to the entire world.
- **Search**: Search allows you to find Tickets, KB’s and Wiki articles, and other items quickly.
- **Customer Chat**: Customer Chat will allow your customers to initiate a chat with your TeamSupport users.
- **Water Cooler**: Water Cooler is a collaboration tool where you can post questions and comments, and chat with other TeamSupport users.
- **Calendar**: The Calendar feature allows you to see events across your team, ticket due dates, and reminders.
- **Users**: The Users section is where you manage users of TeamSupport.
- **Groups**: The Groups section is where you manage groups within TeamSupport.
- **Customers**: The Customers tab is where you can define who your customers are, what products and versions they are using, and attach important files and notes.
- **Products**: An Enterprise Edition only feature. The product module is where you define all of your products and versions.
- **Inventory**: An Enterprise Edition only feature. The Inventory module allows you to track physical inventory items (or “assets”) which have been shipped to customers.
- **Reports**: The Reports section offers best-in-class advanced reporting capabilities which you can use to view your data in virtually any way you want.
• **Admin**: The Admin section is only viewable by TeamSupport admin users and is where you define important aspects of your system.
Ticket Functions – Advanced

Please Note: This section includes Advanced Ticketing Functions. Basic ticketing functions are covered here, in the Quick Start User Basics section of this manual.

Tickets are the core of the TeamSupport system and is where the majority of the work happens within the system. The TeamSupport development team has worked hard to implement a number of useful and unique features in the application which will make it easier to support your customer base.

Explore this section to learn more about how tickets are created, tips and tricks, and detailed descriptions of the My Ticket Grid and Ticket Detail window.
How are tickets created?

TeamSupport is a true multi-channel customer support solution which means that tickets can be created through a variety of means. The following is a list, with links to the appropriate section of the documentation, of the various ways tickets can be created:

1. [Manually via an Agent](#)
2. [Email](#)
3. [Customer Hub](#)
4. [API](#)
5. [Integration with other applications such as CRM systems](#)
6. [Missed Customer Chat](#)
Tips and Tricks for Managing your Tickets

TeamSupport gives you lots of tools to help support your customers. Here are some tips and tricks for managing your tickets:

• **Statuses:** Statuses are important to keep up to date in order to communicate with your customer, but they also allow a user to quickly see which tickets they should be focusing on. You can customize your list of statuses, change your statuses easily on each ticket, and sort in either direction on the status column from the My Ticket grid in order to find the tickets that need your attention.

• **Reminders:** are a great tool to keep help capture important dates or items that require you to follow up. Reminders can be set up for tickets or for customers.

• **Tasks:** add a Project Management dimension to TeamSupport which allows you to manage and assign multiple tasks on a single ticket.

• **Ticket Queue:** Use the Ticket Queue to prioritize your tickets

• **Flags and the Unread Dot:** Use these icons to identify important tickets on the My Ticket Grid

• **Dashboard:** Put a report on your Dashboard using custom fields

• **Reporting section:** Mark a report to save to your Starred Section of Reports to find it easier

• **SLA:** Recognizing status
Tips and Tricks for Supervisors

TeamSupport gives you lots of tools to help support your customers. Here are some tips and tricks for Supervisors who manage other TeamSupport users.

- Review and Manage User Queues for your team
- Setup Ticket Automation to automate some of your tasks
- Put a report on your Dashboard using custom fields or to show trends in your system
- Mark a report to save to your Starred section to find it easier
- Ask for an update on a ticket
- Add a private action on a ticket
- Subscribe to a ticket or a subscribe to a customer to stay in the loop on important issues

Click here to read more tips and tricks for Managing tickets.
A Note about Ticket Visibility

There are two layers of visibility on a ticket – the ticket level, and the action level.

Typically, a ticket which is visible to customers will have a mix of visible and non-visible actions. Non-visible actions are great for internal notes to yourself, or another TeamSupport user. A ticket which is not visible to customers is typically an internal ticket which would have all non-visible actions. While it is allowed, it is not typical to have a visible action on a non-visible ticket.

Here are some notes on system behavior regarding ticket visibility:

When a ticket is visible:

- Associated customers will be able to see the ticket and any visible actions on the Customer Hub.
- Associated customers will receive emails when a visible action is posted and (optionally) when the ticket status is updated. The latter is controlled by an admin setting called “Disable ticket status update emails”.
- If the ticket is a Knowledge Base article (and also taking into account any product associations), all customers will have access to the ticket from the Customer Hub.

When an action on a ticket is marked visible on a visible ticket:

- Associated customers will be able to see the action on the Customer Hub.
- Associated customers will receive an email containing the action.

Ticket and Action visibility are easily changed from the ticket detail window. You can also automatically change a ticket and action visibility using Ticket Automation.
Sending an Email from a Ticket

TeamSupport is built around a very strong base of email communication, and we make it very easy to communicate with clients via email directly from the ticket. We call this feature “Web Conversations” and it is the ability to hold communications with your customers entirely within TeamSupport.

If a ticket is created via email, the Customer Hub, or the ticket submission page, the user's email will automatically be associated with it. To reply to the email, simply add an action to the ticket and check the “visible to customers” checkbox at the bottom. That's it! Your customer will get the action you put in the ticket delivered to them directly via email.

Your customer can then reply directly to the system generated email and that reply will be put into TeamSupport.

It is important to note that when you do log a visible action, the email is placed into a queue and sent 2 minutes after saving the action. This is a protective feature in the event your action needs to be changed for any reason.

When a customer receives a notification about a ticket update they can simply reply to it to add a new action to the ticket automatically.

Note that you can customize how these outgoing e-mails look by changing the email template.

The power of Web Conversations is that it allows you to support your customers directly from within TeamSupport and does not require that you use an e-mail client for any of your day to day customer interactions.

Click here to learn more about setting up email in TeamSupport.
Create a New Ticket Manually

If you want to learn the basic requirements for creating a ticket, read this section first.

To create a new ticket manually, click on the + New Ticket Button next to the TeamSupport logo. Notice also that there is a New Ticket button at the top of each grid in the My Tickets and All Tickets sections.

The following form is displayed.

The only required field for this form is Name.

- **Name:** Each ticket must have a name/description. This is typically the subject of the ticket.
- **Action Toolbar:** TeamSupport gives you lots of tools for enhancing your action description.
- **Description**: This is where you type in the ticket description. You can insert links to other tickets, insert KB articles as canned responses, and other edits.
- **Date Started**: This field defaults to the current time, although it can be changed to indicate the time work on the ticket started.
- **Hours and Minutes**: You can indicate how much time is spent on each action of a ticket.
- **Attach File**: You can attach files to a ticket.

The following describes the available selections on the right hand side of a ticket. Please note that your fields may differ from those described below. Ticket fields can be reordered and/or removed in the **Ticket Page Order** section.

- **Assigned**: Assigns the ticket to a defined TeamSupport user. See the **User section** on how users are created and defined.
- **Group**: Like user assignment, you also have the option to assign a ticket to Groups.
- **Line Spacer**: These can be added/moved in the **Ticket Page Order** section
- **Type**: Tickets can be classified as any Ticket Type, and can be reclassified at anytime.
- **Status**: The Ticket Status defines the current state of the ticket.
- **Severity**: The Severity of a ticket helps define what kind of attention is needed.
- **Add Customer**: You can associate one, or multiple, customers/contacts to a ticket.
- **Visible**: Indicates whether this ticket and the initial action will be visible to customers.
- **Knowledge Base**: Checking this box will add the ticket to your Knowledge Base. When checked, an optional “KB Category” pick list will appear.
- **Community**: Community is a Forum available on the Customer Hub.
- **Due Date**: If you include a Due Date on the ticket, it will be displayed on the right hand side of the ticket and will turn red when past. Ticket Due Dates appear on the **Calendar**, and can be **Reported** against.
- **Product** (Enterprise edition Only): By defining the products provided by your company within the Products section, you will have the option to select the particular product in question with regards to the ticket.
- **Reported/Resolved Ver.** (Enterprise edition only): A powerful option in TeamSupport is the ability to track Reported and Resolved versions on each ticket.
- **Add Inventory**: (Enterprise Only) You can indicate if an item from your inventory was related to the ticket.
- **Add Tags**: Tagging tickets with keywords allows you to further classify and organize your tickets.
- **Add Reminders**: Reminders help you follow up on important issues regarding tickets.
- **Add Ticket**: Allows you to create a “Parent”, “Child”, or “Related” relationship.
- **Add to Queue**: Allows each person on your team to set aside certain tickets from the pack for easier management and prioritization.
- **Subscribe Users**: Subscribing enables team members to get email updates on a ticket’s progress without the need to look up a ticket.
Ticket Detail – Advanced

TeamSupport users spend the majority of their time inside of the Ticket Detail Window. There are many options on this screen for customization as are described below. When you open a ticket, it will open in a new tab along the top of the TeamSupport window. This allows users to multi-task by going back and forth between tickets, and even Customers, Contacts, and Products.

Below are definitions for the various options you have from the Ticket Detail page:

Top Menu

- **+ Public Action / + Private Action**: Allows you to add a new action to the ticket.
- **+ Watercooler Post**: Allows you to add a Water Cooler post that will be auto associated to this ticket.
- **Take Ownership**: Selecting this button will assign the currently selected ticket to the user. For example, a ticket may be assigned to the Customer Service Group but **NOT** assigned to a specific individual. The Take Ownership button is a quick way for users to add any ticket to their list and begin working on it.
- **Request Update**: Any user can use the Request Update feature which will send the ticket owner an email informing them that the requesting user would like an update to a ticket. This feature is especially nice for managers that notice a ticket has been open and untouched for an unusual amount of time.
- **Merge**: This button will give you options for merging two tickets together.
- **Refresh**: Click this button to refresh the Ticket view.
- **Read/Unread**: Toggle this option. This will affect the Read/Unread flag on the Ticket Grids.
- **Subscribe/Unsubscribe**: Subscriptions are a very powerful feature of TeamSupport. Rather than parties of interest having to run down information about a ticket or a customer, users can simply “subscribe” to tickets/customers and will be notified via email when new Actions occur.
- **Enqueue/Dequeue**: Add/Remove the ticket to your Queue.
- **Flag/Unflag**: Flags or Unflags a ticket in any ticket grid view which you can then sort to easily find tickets you have flagged for follow up. Flagged tickets also appear under the “Flagged” tab on your ticket grid.
- **Ticket Number**: This is the automatic number which is given to each ticket.

The following can be found under the “More” menu:
- **History**: This option will display every action taken on a given ticket. You are given the date and time stamp, who performed the action, and what action took place.

- **Print**: Formats the view so the ticket may be printed through your browser.

- **Email Ticket**: The public actions within a ticket can be emailed to one or more recipients.

- **URL**: Will display the URL of the ticket so that you can share it with another co-worker. This cannot be used to send to a customer or any other non-TeamSupport user. This is an internal function only.

- **Filter**: These toggle buttons will allow you to filter the action results for this ticket between Public comments, Private comments, and Water Cooler posts. If you toggle off one of these buttons, the results will not display in the results list.

- **Clone**: This option makes branching out from a ticket easy by copying settings from one ticket into a second ticket. Also, if you generate similar tickets repeatedly, you may create template tickets and generate a copy whenever needed. You will be able to confirm the clone before the ticket is made. The next available ticket number will be used, and the ticket name will be the original ticket name plus (Clone) appended.

  Here are the settings that will be cloned:
  - Actions and Action Log
  - Ticket Relationships
  - Associated Companies and Contacts
  - Community posts
  - Tags
  - Custom Field Values
  - Subscribers
  - Queuers
  - Reminders
  - Assets
  - Attachments
  - SLA metrics
  - Tasks

- **Delete**: Deletes the selected ticket. Only Administrators can perform this action.
• **Ticket Name:** Lists the current ticket name. If the ticket was from created email, this is the subject of the email. This field can be edited by clicking on the field and then clicking Save.

The Action Windows provide important information for the actions which have been added to the ticket. Actions are added inline where the newest action is listed at the top by default.

- **Timeline:** The date of the action will be displayed in a blue box to help acclimate the user to the timeline of the actions.
- **Actor:** Lists who actually created the action.
- **Action Type:** This is a customized list to indicate the type of action. The first action in a ticket is always labeled as “Description”.
- **Timestamp:** Lists when the action was created or edited
- **Sentiment:** Lists the sentiments that were detected in body of the action.
- **Applause:** Team members can encourage each other by applauding their Ticket Actions.
- **Action Description:** The body of the email, or the action description, includes any screen recordings and pasted images.
- **Action Number:** The number in the upper right hand corner of the action box indicates the order in which the action was logged.
- **Private/Public Flag:** Toggle this flag to mark the action as Visible, or Not Visible to customers. Click [here](#) to learn more about action visibility.

The following options can be found by hoovering over the 3 ellipses on the upper right hand corner of the
action:

- **Edit:** Click the button to edit the action. Users rights control which actions users may edit.
- **Delete:** Deletes the selected action. Users rights control which actions users may delete.
- **Pin:** By clicking this button, all users will see this action pinned to the top of the actions list. A pin indicator will appear in the top left hand corner of the action.
- **Knowledge Base Status:** Indicates if an action is visible on the Knowledge Base. The ticket must be set up properly for actions to be displayed on the Customer Knowledge Base. Click [here](#) to learn more about Knowledge Base setup.
- **Open Eye/Closed Eye Icon:** Indicates Action visibility. By clicking on the eye, you can toggle between visible and not visible to customers. Click [here](#) to learn more about action visibility.

**Right hand side of the Ticket Detail Window**

- **Assigned:** Unassigned
- **Group:** General Discussion
- **Type:** Features
- **Status:** Approved
- **Severity:** Urgent
- **SLA Status:**
- **Visible:**
- **KB:**
- **Assigned:** Tips & Tricks -> Product A
- **Days Opened:** 10
- **Time Spent:** 0 Minutes
- **Due Date:**

**Add/Create Customer**

- **Product:** Product A
The following describes the available selections on the right hand side of a ticket. Please note that your fields may differ from those described below. Ticket fields can be reordered and/or removed in the Ticket Page Order section.

Furthermore Enterprise customers may add additional sections to the ticket page using Ticket Widgets. Widgets use HTML and JavaScript to add customization, pop-up boxes, and can pull in native or external data to display on the right side of the ticket.

- **Line Spacer**: These can be added/moved in the Ticket Page Order section
- **Assigned User**: Indicates the user who is currently assigned to the ticket.
- **Group**: Indicates the group who is currently assigned to the ticket.
- **Type**: Indicates the Ticket Type that is currently selected for the ticket.
- **Status**: Indicates the Ticket Status that is currently selected for the ticket.
- **Severity**: Indicates the Ticket Severity that is currently selected for the ticket.
- **SLA Status**: Has several indicators to show the current SLA Status.
- **Visible**: Indicates Ticket visibility.
- **Sentiment**: Indicates the sentiment score of the Ticket.
- **Knowledgebase**: Indicates Knowledgebase status.
- **KB Category**: Indicates the selected Knowledge Base Category. This is only visible when “Knowledgebase” is “Yes”.
- **Community**: Indicates the currently assigned category for Community (Forum).
- **Days Opened**: Indicates the number of days the ticket has been open.
- **Total Time Spent**: Total time spent on the entire ticket based on aggregate time spent on each action.
• **Due Date:** You can indicate the date in which the ticket is due. When the ticket becomes due, this field will be displayed with red text and surrounded by a red box. Due Dates are displayed on applicable Calendar views. You can also change due dates on more than one ticket at once from the Ticket Grids.

• **Customers:** Add a new or existing customer to a ticket.

• **Custom Fields:** Displays any custom fields in their designated category for this ticket along with their selected values.

• **Product:** Add and View Product associated to a ticket.

• **Reported:** Add and View Reported Versions associated to a ticket.

• **Resolved:** Add and View Resolved Versions associated to a ticket.

• **Inventory:** Add and View Inventory associated to a ticket.

• **Tags:** Add a new or existing tag to a ticket.

• **Reminders or Tasks:** Add and view your own Reminders or Tasks on a ticket. Reminders are found in Support Desk Edition, while Tasks are found in Enterprise Edition.

• **Associated Tickets:** Associate a related ticket to the current ticket.

• **User Queues:** Add and View the users who have the selected ticket in their User Queue.

• **Subscribed Users:** Add and View the users who are subscribed to the selected ticket.

• **Jira:** View, Create new, or Associate an existing Jira ticket to the selected ticket.

• **TFS:** View, Create new, or Associate an existing TFS ticket to the selected ticket.

• **File Attachments:** The file attachments on a ticket are consolidated on the right hand side of the ticket for your convenience.
Assigning a User to a Ticket

There are several ways a user can become assigned to a ticket including:

1. When an agent creates a new ticket, by default, that user is assigned to the ticket. Click here for additional information on creating a new ticket.
2. In the Customer record, a “Default User” can be indicated. Any new ticket for this customer will be initially assigned to the default user. Click here for more information on Customer settings.
3. A user can take ownership of any ticket by clicking on the “Take Ownership” button from the “My Tickets” grid or from the top toolbar of any ticket.
4. Ticket Automation can assign a ticket to a user based on specified conditions.
5. Any user can reassign a ticket to another user from the My Tickets window using the “Assign user” button under “More” on the top grid navigation.
6. From the Ticket Detail window, a user can select a different user from the drop down menu. See screenshot below:

   This list begins with unassigned, and then is followed by the user who last had ownership of the ticket (the sender). Next in the list are the users who are members of the group to which the ticket is assigned to (if any). The remaining users are listed in alphabetical order.
Assigning a Group to a Ticket

There are several ways a group can become assigned to a ticket including:

1. A Default Group can be selected for all new tickets from email and the Customer Hub. This option can be found in your Admin settings.
2. When an agent creates a new ticket, the user can select an initial group assignment. Click here for additional information on creating a new ticket.
3. In the Customer record, a “Default Group” can be indicated. Any new ticket for this customer will be initially assigned to the default Group. Click here for more information on Customer settings.
4. Ticket Automation can assign a ticket to a group based on specified conditions.
5. Any user can reassign a ticket to another group from the My Tickets window using the “Assign Group” button under “More” on the top grid navigation.
6. From the Ticket Detail window, a user can make a group selection from the drop down menu. See screenshot below:

   ![Ticket Detail Window]

   Your system is pre-configured with a list of groups. Click here to learn how to customize your list of groups.
Customers on Tickets

Associating a Customer to a Ticket

There are several ways a customer can become associated to a ticket including:

1. When a customer sends an email to your support address (read how to configure email [here](#)) a ticket will be created and their email address will be associated with the ticket automatically. If this email is already in your Customer list, the ticket will automatically be matched with the contact. If we do not recognize the email, we will associate it with _Unknown Company_.
2. If you open a new tab for a Contact from the Customer section, then press “New Ticket”, the customer will be automatically associated with the new ticket.
3. **Ticket Automation** can assign a customer to a ticket based on specified conditions.
4. You can always add or edit the customer list from the Ticket Detail Page by clicking on the Add button as in the screen shot below:

   ![Customer List Screen Shot](#)

   The list will narrow down based on the text you type.

   If you need to add a new customer that will be associated with the ticket, you can do so from the Ticket Detail window. Start by typing in the name you would to add. The word “Create” will be the first choice in the drop down menu. Clicking “Create” will display the following window:
Required fields are First Name and Last Name. If you leave Organization blank, the Contact will be associated with Unknown Company.

Let’s discuss what happens when a customer is associated with a ticket:

- You may add any number of customers to a ticket
- You may associate a Company only, without an actual contact. This is useful if you would like to match a ticket to a company, but do not have, or do not wish to notify any person from that company.
- In order for the associated customer to see the ticket, the ticket must be marked “Visible to customer”. Within a visible ticket, Customers will only be able to see visible actions. Click here to learn more about ticket visibility.
- When a customer has been marked “inactive”, or their service expiration date has passed, the customer box in the Ticket Detail window will appear with red text and surrounded by a red box.
- To remove a customer from a ticket, click the “x” next to their name.
- You can hover over the customer or contact to view additional information without needing to visit the full Customer section. By hovering over the company, you can see the 5 most recent tickets, 5 most
**Recent Activities** and the **service expiration date** as displayed in the screenshot below. Additional information such as email and phone numbers are also displayed.

<table>
<thead>
<tr>
<th><strong>A Plus Productions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Website</strong></td>
</tr>
<tr>
<td><strong>Service Expiration</strong></td>
</tr>
<tr>
<td><strong>Work</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Monthly Support Hours</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hours Used</strong></td>
</tr>
<tr>
<td><strong>Hours Remaining</strong></td>
</tr>
</tbody>
</table>

**Recent Ticket History**

- 1480  New  Zoom Question (Clone)
- 1286  New  Help! My software keeps giving me...
- 789   Closed - No Email  HIPAA Compliance
- 624   Under Review  Getting Exception Errors
- 569   Closed  Reminders

**Notes**

- Important Client...
- server upgrade
- Portal HTML
- HD Server
- Client Call

**Primary Customer**

When associating multiple customers to a ticket, it may be helpful to identify which is the ‘primary’ customer. This is especially useful when associating customers who are actually 3rd parties, resellers, contractors, etc, who help to get the work done on the ticket.

The primary customer on a ticket is indicated by the ‘P’ icon to the right of their name on the ticket.

**Add/Create Customer**

- Aviato
- Erlich Bachman
- Pied Piper
- Richard Hendricks
- Jared Dunn
- Hooli Inc.
- Gavin Belson
To identify which is the primary customer, click on the ‘P’ icon on the top right corner of the customer section on a ticket. This will allow you to edit the Primary Customer.

### Important Details

- Only one primary customer can be selected per ticket.
- A primary customer is not required, and clicking the currently selected primary customer will remove the designation.
- The Primary Customer will default to the creator of the ticket IF the ticket is created via email from a Contact.
- The Primary Customer feature extends into [reporting](#), including Custom Ticket Views.

### SLAs

If a primary customer is specified on a ticket and your account has Customer specific SLA’s, the SLA will adhere to the primary customer, and will change automatically on the ticket.
Ticket #280397

PC testing

<table>
<thead>
<tr>
<th>SLA Name</th>
<th>Hooli SLA</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLA Type</td>
<td>Next Warning</td>
</tr>
<tr>
<td>Initial Response</td>
<td>4/14/2020 6:19 PM</td>
</tr>
<tr>
<td>Next Action</td>
<td>None</td>
</tr>
<tr>
<td>Close</td>
<td>5/26/2020 10:19 AM</td>
</tr>
<tr>
<td>Soonest Date</td>
<td>4/14/2020 6:19 PM</td>
</tr>
</tbody>
</table>

Product

Sentiment

Add/Create Customer

- Aviato
- Erlich Bachman
- Pied Piper
- Richard Hendricks
- Jared Dunn
- Hooli Inc.
- Gavin Belson
Using the EntityID Field

The EntityID field can be found under ‘Company Info’ on the Customer record. The following parameter can be passed on the subject line of an email generated from a contact or a TeamSupport user.

[EntityID:XXXX]

This causes the customer with the matching EntityID to be associated and identified as the primary customer on that ticket.
Action Editing Features

When you click the “Add Public or Private Action” link in TeamSupport, the following text box will open up and allow you to type directly into it. As you begin editing, drafts are saved after 10 seconds of inactivity. In the event of a ticket or page refresh, your work will not be lost and it will populate into the ticket window when you reopen the ticket.

Along the top of the action you will find:

- **Name:** You can click on the ticket name to edit it.
- **Public/Private Flag:** This field can be toggled, and indicates whether the action will be visible to customers.

At the top of the text box is an editing bar with a number of great features that can be used to edit the text and add information to the ticket:

- **Insert Pasted Image:** One of the most useful features for customers who support software based tools, this feature lets you insert a screenshot directly into the ticket action. You may copy screenshots directly into the text box using Firefox, Chrome, and IE 11 or higher. Stay tuned for support of this feature in Safari.
- **Suggested Solutions:** This feature, also called “canned responses”, lets you select one of your Knowledge Base articles and the text (and any images/recordings) of that article will be put directly into the action.
- **Insert Ticket:** To better describe a particular issue, it’s often beneficial to put a link to another ticket with the description. The Insert Ticket function lets you put this link in an action so that clicking it will take the user directly to the other ticket (see Associated Tickets for another option to relate tickets).
• **Insert Image:** In addition to the Insert Pasted Image option, TeamSupport allows you to insert images from a stored library. This library is shared with the Wiki so you can have images used in both locations within the application and develop a common library of often used images.

• **Insert Dropbox:** TeamSupport has an integration with Dropbox which lets you insert a link to images and documents from your Dropbox account.

• **Record Screen:** Another unique feature of TeamSupport is our ability to record a screencast and embed it directly into the ticket action.

• **Clock Icon:** Click this button to insert a timestamp. This is useful if you need to update an action.

• **Record Video:** You may add a video to actions into the tickets and through the Customer Hub recorded using your webcam.

• **Link / Unlink:** By highlighting a piece of text and clicking the link button, you can create a hyperlink outside of TeamSupport. Similarly, if you have text that is hyper-linked and you want to remove the link, select the text and click the unlink button.

• **Undo / Redo:** These buttons, and associated shortcuts (Ctrl-Z for undo and Ctrl-Y for redo) will allow you to undo recent changes to your action.

• **Remove Formatting:** This will strip formatting from the selected text (bold, italics, etc).

• **Cut, Copy, and Paste:** The traditional cut, copy and paste text buttons. Note that the standard shortcuts (Ctrl-X, C, And V) will work as well.

• **Paste as Plain Text, Paste from Word:** Often when text is copied from third party applications it can come along with HTML formatting that is not desired. To prevent this, when copying from another application you may want to try Pasting as Plain Text or Paste from Word.

• **Decrease & Increase Indent:** These will change the indentation of a block of text.

• **Bullet and Numbered Lists:** Using these functions will let you create either bulleted lists or automatically numbered lists.

• **Alignment:** Changes the text alignment to left, center, right, or full.

• **Color, Background Color, Font Family, and Font Size:** These let you customize the text style in the action to be formatted in whatever way you would like.

• **Bold, Italic, Underline, Strike through:** Formats the text as expected.

• **Block Quote:** Selecting text and using the block quote will indent the text, put a box around it, and make the background a light blue. This is useful for calling out specific text in an action. Note: This formatting function often does not display correctly in emails, so be careful when it’s used.

• **Insert/Edit Code Sample:** This button allows you to enter code snippets into your action that will be processed as text as opposed to processed as code. This allows you to share code snippets in actions.

• **Source Code:** Opens a window to allow you to see the source code of the action window.

• **Insert Table:** Allows you to insert a table of columns and rows into your action.

You may also adjust the height of the window by dragging the bottom right hand corner of the window.

Underneath the box where you type in your action description, you have several additional options:

• **Date Work Started:** This field defaults to the current time, although it can be changed to indicate the time work on the ticket started.
• **Start Timing:** You can click this button to allow the system to start a counter for the time spent on the current action.

• **Hours and Minutes:** Alternatively, you can indicate how much time is spent on each action of a ticket.

• **Type:** A customizable list to indicate the type of action. This field is often used to indicate whether an action is billable.

• **Knowledge Base:** Checking this box will add the ticket to your Knowledge Base.

• **Attach File:** You can attach files to a ticket.

• **Save/Update (with Submenu):** This button will save or update your action. If you select the arrow next to this button, you will also be able to set the status at the same time as saving.
Embed Images and Screen Shots

TeamSupport offers two easy ways to embed images or screenshots into your tickets – You can paste them directly from your clipboard, or you can access a warehouse of previously uploaded images and add them directly to the action. As the saying goes, a picture is worth a thousand words, and embedding screenshots or other images can really help your customers understand the solution to their problems.

Insert Pasted Image

First you need to copy an image to your computer’s clipboard. Most customers use a screen capture utility such as TechSmith’s SnagIt to capture screen shots and then annotate them as needed. Once the image has been captured, you can use the “copy all” or “Ctrl-C” (command+c on a mac) command to move the image into your computer’s clipboard.

Once there, you can click on the “Insert Pasted Image” icon from the Action toolbar: ![Insert Pasted Image](image.png), or press Ctrl + V to paste directly into the action window.

Please note that while the “Insert Pasted Image” button is still available, you may past screenshots directly into the text box using Firefox, Chrome, and IE 11 or higher using Ctrl+V. Stay tuned for support of this feature in Safari. Below are instructions to use the “Insert Pasted Image” button.

Follow the instructions on the screen to past the image into the window.

Please click here and paste your image

Windows users Ctrl+V, Mac Users Cmd+V or from your browser menu select edit and then paste.
Note: Due to technical limitations of browsers, this feature is only supported in Firefox and Chrome – Internet Explorer and Safari do not have the capabilities we need.

Your image will appear in the body of the description and you can put leading and trailing text around the image as usual.

Additional ways to insert images into your ticket:

- Image Manager
- File Upload
Suggested Solutions / Canned Responses

Please note: The “Insert Knowledge Base” feature is now “Suggested Solutions”

When logging an Action on a ticket, you can insert a KB article on the fly. This is an easy way to provide answers to repetitive questions and avoid the need to retype the solution over and over again. Some people call this “canned responses”.

Insert Knowledgebase

Search a ticket number or description:

Or select a suggested solution:

4 solutions found.

1462: KB Example
Tags: password, email
Category: Features

1411: Contract Question
Tags: email, password, reset
Category: Uncategorized

686: How to Reset Email Password
Tags: reset, password
Category: Uncfiled Subcategory

To reset your password, perform the following actions...

- Click the Reset Password button on the login page (an email will be sent to you)
- Click the Reset Password link inside the email
- Type your new password twice (must be 8 digits, have one upper case and one number)
- Click Save New Password button (an email is sent confirming the change) and you will be prompted for the login screen

TeamSupport gives you two options for inserting KB articles into your actions. Both are available by clicking the “Suggested Solutions” button on your action toolbar:

1. **Suggested Solutions**: TeamSupport will suggest relevant articles to you. The suggestions are based on keyword tags in your KB article. These tags will match keywords that you have used in your ticket.

2. **Search for Solutions**: You may search through public or private KB articles by typing in a KB number, keyword, or phrase. Matching results will be displayed in the drop down menu.

You may click/select any article to preview it on the right hand side of the Suggest Solutions window.
You have two choices when you are ready to insert the article into your ticket:

1. **Insert Link:** Inserting a link will allow the customer to access the KB article from your Customer Hub. Please note that when using this feature, if you do not allow anonymous access to your KB articles, your customer will be asked to log in before they can view the article. The “Allow Anonymous Knowledge Base” setting can be found under Admin->Customer Hub->Basic Hub Settings->Anonymous Access Settings.

2. **Insert Article:** This method will simply copy all text, images, and recordings that are present in the preview pane into your ticket action. Only public actions in the KB article will be copied to the ticket. Private actions in the KB article will not be previewed or copied to the ticket. The entire description of the text is editable, even the portion that came from the inserted Knowledge Base.

Here is an example of one type of workflow to use this feature:

1. Make a new ticket with any Ticket Type.
2. The ticket name is the KB name and the description is the article body.
3. Attach any files, insert a screen recording, and/or images.
4. Set the Status of the ticket to Closed.
5. Check the box Knowledge Base. Optionally, choose a Knowledge Base category.
6. Check the Visible box.
7. Add a ticket tag.
8. Click Save & Close

The next time someone creates a ticket with your team that you have already answered:

1. Log a new action in the ticket and type in any leading text.
2. Click the Suggested Solutions button.
3. Preview one of the suggested solutions that have tags that match the keywords you have used in your ticket.
4. Click the Insert Article Button.
Image Manager

The Image Manager is used to store documents that you can later insert into tickets. The image manager is shared between tickets, Knowledgebase Articles, and Wiki Articles.

You can upload a new image, or insert an existing image into your ticket by clicking on the Image Manager button from the Action toolbar:

When clicked, the following window will appear. You can choose from previous uploaded images, or you can upload images to the editor, then insert. You can also organize images into folders.

Important Note: There is no individual security for files in the Image Manager. Even if you mark a ticket or Wiki Article as private, the images you upload are visible to everyone within your company when viewing the folders.
Screen Recording

TeamSupport provides a screen recording feature so that your teams can better describe a solution to your customers. You can record your screen and embed it within the ticket action so your customers can play a video and optionally hear your voice recording describing exactly how to do something. A single recording can be up to 5 minutes long and are embedded right within your action. Your customers also have the option of Screen Recording from the Customer Hub.

Use Cases

While Screen Recording is great to share information with your customers, another use case is to share information between teams. For example, if your customers report a bug, and your Support team is able to replicate, they can record their testing using Screen Recording and pass to a developer. This knowledge transfer saves valuable time and allows you to provide solutions to your customers faster. Additionally, Screen Recordings can be embedded into Knowledgebase articles or internal or customer facing purposes. If you have a new feature you would like to display, or a short tutorial, you may create a Screen Recording to save to the Knowledgebase which would be viewable from inside of TeamSupport for internal users, or on the Customer Hub for customers.

When you are creating a new ticket, or adding an action to an existing one, click the Record button in the tool bar to record your screen and embed it into the ticket:

First Time Use / Setup Instructions

TeamSupport utilizes browser extensions to operate Screen Recording. If this is the first time you are using Screen Recording, or if this is the first time you are using Screen Recording since we moved to using extensions (April 2 2016), you may be prompted to add an extension to your browser. You will only need to do this once.

For example, in Chrome. You will get the following prompt:
Extension Required

An Extension is required in order for Screen Sharing to function properly. Please select your browser and install the extension. Once the installation is complete close this dialog and click the Record Screen button again.

Click the “Add to Chrome” button and follow the prompts to add the extension to your browser.

Add "Teamsupport Screen Sharing"?
5 stars (1)
12 users
View details

It can:
- Communicate with cooperating websites
- Capture content of your screen

Add extension Cancel

To complete the setup, you must refresh your browser.

Using Screen Recording

Click on the Private or Public action link, then click on the record button on the action toolbar:

You will be prompted to select your display:
You have several options for your display including individual browser windows, your entire “Internal” display (which is your first monitor or your laptop screen), or external or secondary monitor displays. If you select “Internal” or “External” displays, you may move around between windows and your recording will capture everything all mouse movements.

Select your desired display and click the “Share” button.

**Initial Recording options**

- **Record Button**: When you are ready to begin, click the blue “Record Screen” button on the action window display. Your 5 minute counter will begin. If you are sharing your “Internal” or “External” display, you may move around between windows and the recording will continue to be captured.

- **Eject Button**: To cancel the recording, you may click the eject button. This causes the record and eject buttons to be removed and allows you to begin the process again by clicking on the record button from the action toolbar.
Record-in-process options

- **Mute/Unmute**: You have the option to use your voice to narrate your recording. By default, your microphone is turned on. You may toggle the mute button on/off depending on whether or not you would like to record audio on your recording.

- **Stop**: When you are ready to stop recording, click the stop button. Your video will be loaded into the action window for your review.

- **Eject Button**: To cancel the recording, you may click the eject button. This causes the record and eject buttons to be removed and allows you to begin the process again by clicking on the record button from the action window.

Once the video is loaded into the action window, you may click the play button to play the video. If you are not satisfied with the video, you may delete it by putting your cursor after the video and clicking the backspace button – just like any text or image.

You may add text and images in the same action as the recording. After you save your action, the screen recording will be available for other users to view in the TeamSupport action. Customers will see a link in their email for the recording. They can click on the link and will be directed to login securely to the Hub in order to view the recording.

**Troubleshooting**

We have recently updated our Screen Recording app to use browser extensions. Most Screen Recording issues can be resolved by [clearing your browser cache](#).
Video Recording

In addition to Screen Recordings, you can now add Video Recordings into your tickets in the app as well as through the Customer Hub. This allows you to provide a real face and voice to your customers, improving the customer experience even more! Your customers also have the option of Screen Recording from the Customer Hub.

While the Screen Recording option is great for capturing content or issues that are on a computer (like new features or an error message), Video Recording is a powerful option to allow adding a video of your face, or a physical product that can be captured with a webcam.

To add a Video Recording to an action from inside of TeamSupport, click the “Record Video” button which can found on the editing tool bar button:

The following window will be displayed which will allow you to capture a video using your webcam.

Options while waiting for recording

- **Mute**: You have the option to mute your audio. By default, your video with not be muted. The mute button appears in the upper right hand corner when you hover over your video.
- **Record**: Click the blue record button under the video when you are ready to begin your recording
- **Eject**: If you change your mind about inserting a video recording into your action, you can click the red eject button located under the video. This will cancel the video and remove the video recording
buttons. You may click the Record button on the action toolbar to begin again.

When you click the blue record button, the following screen is displayed:

![Currently Recording ...](image)

**Options while recording is in progress**

- **Mute**: You have the option to mute your audio. By default, your video with not be muted. The mute button appears in the upper right hand corner when you hover over your video.
- **Stop**: Click the red stop button under the video when you are ready to stop your recording.
- **Eject**: If you change your mind about inserting a video recording into your action, you can click the red eject button located under the video. This will cancel the video and remove the video recording buttons. You may click the Record button on the action toolbar to begin again.

When you click the red stop button, the following screen is displayed:
Options when recording is complete

- **Re-Record**: If you are not satisfied with your recording, you may click the blue record button to re-record.
- **Insert Video button**: Click the green insert video button when you are ready to upload your video to your action.
- **Eject**: If you change your mind about inserting a video recording into your action, you can click the red eject button located under the video. This will cancel the video and remove the video recording buttons. You may click the Record button on the action toolbar to begin again.

When you upload your video to your action, your action will be embedded in your action and available for playback.
Here is a video of my headset. I am demonstrating the problem that we discussed earlier today.

You may add text before and after your video. To delete your video, simply put your cursor behind the video and delete just like you would any other text or image.

Your customers will have to option to view this video from the Customer Hub in Knowledgebase or ticket format. Emails containing this action will have a link to the Hub where customers and view the video.

Click here to learn more about your customers can also attach videos to their tickets from the Customer Hub.
Time Tracking on a Ticket

You can track time spent on tickets by manually entering this by hand, or you can use the auto timer feature.

To use the auto timer, simply click the red timer to start. When clicked, the timer will turn green. Clicking again will pause the timer. When you are ready, just save the action and the elapsed time will update automatically.

One you save the ticket/action, the total time tally can be seen on the right side of the ticket. You can use this tally for informative reports such as: How much Support have you given to a particular Customer this month? How much time is being spent on tickets associated to a particular Product? How much time has a specific user spent working ticket this month?

Forcing Time Spent

If you want each action added to also include time spent, you can force this by going to Admin -> My Company and setting “Require time spent on timed actions” to True. Any time someone adds an action to a ticket and forgets to add their time spent, they will be prompted to do so – and will not be allowed to save the action until time is entered.

Click here for some additional ideas for tracking time with your customers.
File Attachments on Tickets

There are multiple ways to add file attachments to actions within tickets:

Manually

You can add file attachments to a ticket through the TeamSupport user interface by clicking on the Attach File button at the bottom of the action. You can also drag and drop files directly onto the “Attach File” button and the files will be uploaded and attached.

Via Email

When a ticket update comes into TeamSupport and has an attachment with the email, we will automatically make that file part of the action. If the email has embedded images, we will do our best to parse the email and put the embedded images inline in the action.

From the Hub

When customers submit new tickets or add actions to existing tickets they have the ability to attach files here as well.

Additional Information about Attachments

- Any file type is accepted.
- Attachments on Public Actions will be sent to the Customer via email. If the attachment is too large to be accepted by the Customer’s email handler, they can view the attachment via the Customer Hub.
- File attachments are limited to 25 MB throughout the TeamSupport app and also on the Customer Hub.
- Attachments on a ticket are consolidated for your convenience on the right hand side of the ticket. The right hand side of tickets can be customized.

Related Topics

- Click here to learn how to Embed Images and Screen Shots
Code Samples on Tickets

TeamSupport provides the “Insert/Edit Code Sample” button in the action editing toolbar which gives you the ability to share code samples within actions.

If you choose not to use this button and paste code directly into the action window, you may get varying results. For example, your code might be processed by the editor and your formatting may not be retained.

Using the “Insert/Edit Code Sample” Button

To insert sample code, press the “Insert/Edit Code Sample” button from the action toolbar. The following window will be displayed:

```
<code>
<html>
  <label>Name</label>
  <div class="popover-wrapper">
    <a href="#" ng-class="{'editDisabled': !settings.Features.EnableTicketNameModification}"
       onbeforesave="checkTicketName($data);" style="margin-left:15px;"
       editable-text="Ticket.Ticket.Name" edit-disabled="!settings.Features.EnableTicketNameModification"
       onaftersave="updateTicketName(Ticket.Ticket.Name);">{{Ticket.Ticket.Name}} | | "." </a>
  </div>
</html>
</code>
```

Choose the language of your sample code and paste the code into the provided window. When finished, click Ok.
Your code will be placed in a separate box within the action. You will see that the tags will be highlighted in different colors which you can use to ensure the code was pasted properly. Once the code is inserted, if you would like to edit again, you must click inside this box so that the outline is of the box is highlighted, and click the "Insert/Edit Code Sample" button again.

After you save your action, your code sample will appear as follows:

```html
<div>
  <label>Name</label><br />
  <div class="popover-wrapper">
    <a href="#" ng-class="{'editDisabled' : !settings.Features.EnableTicketNameModification}" onbeforesave="checkTicketName($data);" editable-text="Ticket.Name" edit-disabled="!settings.Features.EnableTicketNameModification" onaftersave="updateTicketName(Ticket.Name);">{{{Ticket.Name} || "-" }}</a>
  </div>
</div>
```
SLA Status on a Ticket

TeamSupport has the ability to define various levels of SLAs and assign these to customers. Click here to learn more about SLA’s and how to configure them from within TeamSupport.

From within a ticket, the SLA status is displayed on the right hand side of the ticket as shown in the screen shot below.

Additionally, when you mouse over the index card next to the SLA Status, you will be given additional information:

This window will indicate which SLA is currently being calculated. The SLA warning icon will change color depending on the SLA status: Red for violation, Yellow for warning, and Green for no issues. If you have selected a Ticket Status which will “pause” an SLA, the box will indicate the paused state accordingly.

The “Open this ticket” icon in the My Tickets Grid will also be green, red, or yellow according to SLA status.

Click here to read more about reporting on SLA status.
Product on Tickets

Edition: Enterprise

One of the biggest differences between TeamSupport and other customer support solutions on the market is being able to link product versions to a customer and a ticket. The development/product management team can define every product and version within the Products section. By defining your products, you will have quick access to this information from several pull down menus in the ticket window as show in the screenshot below:

<table>
<thead>
<tr>
<th>Product</th>
<th>DB Wizard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reported Ver.</td>
<td>1.0</td>
</tr>
<tr>
<td>Resolved Ver.</td>
<td>2.0</td>
</tr>
</tbody>
</table>

You can expose additional information by mousing over the product fields:

**Product Lines**

Product Lines is an option feature that can configured to filter Ticket types and to use custom Email Templates. While you do not select Product Lines from the ticket, they are linked to Products, which can be selected on a ticket. Based on the Product selection made on a ticket, Ticket Types will be narrowed down based on how they are configured in Custom Properties. Additionally, if configured, specific Email Templates may be used based on Product Selection. Click here to learn more about configuring Ticket Types, and here to learn more about Email Templates.

**Custom Fields**

TeamSupport offers custom fields on tickets, for which there is an option to define a “Parent Product”. If a “Parent Product” is defined, that custom field will only be displayed if the “Parent Product” is selected on the ticket. Click here for more information on configuring conditional custom fields.
Ticket Automation

You can automatically change a Product on a ticket using Ticket Automation.

Relating Tickets by Product selection

Click here to learn how you can use the product section to relate tickets together that are affected by the same product versions.
Custom Fields on Tickets

Custom fields are an important part of customizing TeamSupport according to your needs. Click [here](#) to learn more about adding Custom Fields.

Custom fields are displayed in a group on the right hand side of the ticket.

**Nature of Issue**

- Pick From One of these
  - Benefits
  - Root Cause
  - User Error

If a custom field is mandatory, before saving, or prior to closing, the display will change to red text and will be surrounded by a red box.
Inventory on Tickets

Edition: Enterprise

TeamSupport's Inventory module allows you to track physical inventory items (or "assets") which have been shipped to customers. You can also associate these assets to tickets for easier tracking.

To add assets to tickets, simply click the add Inventory link to the right within a ticket. There you can type in an asset name and/or a serial number. You can add as many assets to a ticket as you like.

Hovering over the asset will give you all of the info about the asset.

Click [here](#) to learn more about tracking assets from within TeamSupport.
Tagging a Ticket

Tags allow you to organize tickets around keywords that make sense to you. For example, you could add a tag called “Exchange” to quickly see a list of tickets that involve the exchange server.

You can add/view/edit tags from the Tags section on the right hand side of the Ticket Detail window:

Add Tag

overdue × reminders × zoom ×

If a tag does not exist, once you add it to a ticket, it will be created and can be viewed in the tag section. There is nothing special you need to do to create a tag, just type in the keyword, and click to add! If the tag already exists, you will see a box with the tag name in it as you start typing and you can just click on it.

To remove a tag from a ticket, click the “x” next to the tag.

If you click on a Tag, you will be directed to the Tag Section where you can see other tickets that share the tag.

Click here to learn more about the Tag Section.

In addition to relating tickets together, tagging is also used for Ticket Deflection on the Customer Hub. Click here to learn more about this feature.
Reminders are a great way to stay on top of follow ups with tickets. Simply add a reminder and an email will be sent to you on the due date.

You can also add reminders for customer accounts and individual contacts. Click here to learn more.

Reminders for Tickets and Customers are displayed on applicable Calendar views.

To add a reminder on a ticket, open a ticket and click “add” under the Reminders section on the right.

The following form is displayed. Fill in the form and click OK.
You can view the reminders for tickets on the right hand side of the Ticket Detail window. You can also view and manage all of your Reminders in the My Tickets section under the Reminders tab.
Tasks on Tickets

Edition: Enterprise

The Tasks feature allows TeamSupport users to assign and track multiple Tasks for other users or themselves. This way a single person, like a Project Manager or a Ticket creator, can assign various Tasks out to other users at any time. Furthermore, you can create 1 layer of Subtasks for your main Task. This allows you to add further granularity and organization to your Tasks. There is not a limit to the number of Tasks or SubTasks that can be created. Tasks can be setup with Reminder Dates and Due Dates so that deadlines are not missed. An email will be sent to the assigned user on the reminder date and/or the due date.

Here are some ideas for Tasks:

- **Followups**: Set a reminder to followup with a Customer at a certain time/date.
- **Approvals**: Ask for approval on a Ticket or Product by assigning a Task to the Approvals User or Group.
- **Documentation**: If the result of a ticket means that your documentation should be updated, ensure this happens by creating a Task for your Documentation Group.
- **RMAs**: There are a number of steps required with Return Merchandise Authorizations. You can assign multiple Tasks out to multiple Users at once.
- **Software Releases**: If a bug is reported, there are multiple Users and Groups who would need to take action on a the ticket in order for it to be released.
- **Orders**: When a new order is created, this sets off a chain of events which can be handled by associating the Order to Customers and Products, and assigning to the appropriate Group and User.

You can view the Tasks for tickets on the right hand side of the Ticket Detail window.

You can also view and manage all of your Tasks from the **Task** section on the left hand navigation.

To add a Task on a ticket, open a ticket and click “add” under the Task section on the right.

The following form is displayed. Name is the only required field. The ticket will be auto associated to the
Task.

Field Definitions

The field definitions are the same for Tasks with associations other than Tickets. Click here to see definitions for all Task fields.
Relating Tickets

In many situations, it is important to be able to associate, or relate, multiple tickets together. This can be useful, for example, when multiple issues all relate to a common root cause or if several customers report the same issue.

In TeamSupport there are three types of ticket associations:

1. Related
2. Parent
3. Child

A “related” ticket is the simplest association and just means that multiple tickets have something in common. You can see what tickets are related to each other in the Associated Tickets section of the Ticket page and click on them to go to that ticket.

The parent/child relationship is a bit more complex – The key thing to understand in a parent/child relationship is that by default an action, group, or status change on the parent ticket will also modify the child ticket. One example of when this is useful would be in a case where multiple customers all report the same issue – With a Parent/Child relationship you can create a master (Parent) ticket and set all of the other tickets to be Children. When you add a public action to the Parent ticket, it will also get added to all of the Child tickets and your customer will be notified. Likewise, if you change the status of the Parent ticket, the statuses of all the Child tickets will be modified as well – This can be a great time saver for your customer support team. There is a setting under Admin->My Company called “Update Ticket Children Group with Parent” which will allow you to define the behavior for Group changes.

We do not recommend turning a customer ticket into a Parent ticket. Instead we recommend creating a new ticket for the Parent ticket, and making any customer tickets Child tickets. The reason for this workflow is so that you can continue to have private conversations with your customers on the Child tickets. The conversations on the Parent tickets will be seen by all of the Child tickets.

Important notes:

1. If you add an action to a parent ticket, the child tickets will also have this action added.
2. By default, if you change the status or group of a parent ticket, the child tickets will be changed to match the status and group of the parent.
3. If the ticket type is the same for both the parent and child, updating the status of the parent will also update the child’s status as well.
4. If you make any changes to the child ticket, nothing will happen to the parent.
5. If a ticket is related and changes are made, no updates will be made to the other related tickets.
Once a ticket is created, you can create any of the 3 relationships with any other ticket by clicking on the “Add Related Ticket” link on the right hand side of a ticket.

As you begin typing, the list will narrow down to show available matches. You will then be prompted to choose which type of relationship you would like to create.

When you hover over the related ticket, you will see the ticket details. Within this pop up, you can click on any blue text to be taken to the proper area within the application.
Request Update

The quickest way to get an update on a ticket from the assigned user is to use the “Request Update” button at the top of any ticket:

When this button is clicked, the following message is displayed indicating that an email update was sent to the assigned user:

The page at https://app.teamsupport.com says:  

An update has been requested for this ticket.

You can customize what the email says by editing the template named “Ticket Update Request”. Click here to learn about customizing email templates.
Merging Tickets

Merging Two Tickets Only

To merge two tickets into one, you will first choose the loser (the ticket that will be lost). With the losing ticket open in a tab, click the Merge button in the tool bar.

When you do this, a dialogue box will appear asking you to locate and choose the winner. Simply search for the ticket by name or number.

When you merge tickets, all of the actions, customers, tags, subscriptions, associations, queues, reminders and assets on the losing ticket will be moved to the winning ticket, and then the losing ticket will be deleted.

Please note: A merge cannot be undone, and you are required to check an “I understand” box before you can perform each merge.
**Merge Tickets**

1. **You have selected the "loser" of the merge**
   All the actions, customers, tags, subscriptions, associations, queues, reminders and assets to this ticket will be moved to the "winner" you choose below. The "loser" will then be deleted.

2. **Next choose the Ticket you want to keep the "winner"**
   You can only choose one Ticket. If you'd like to merge more than two tickets together just go through the merge process again after the merge you are performing now is done.

   114: Bios post errors

   Here is some basic information about the ticket you have selected:
   **Ticket Name:** Bios post errors
   **Ticket Assigned To:** Michael Scott
   **Ticket Description Sample:** Hey Bob. Just wanted ...

3. **Finally, click "OK" to merge these Tickets.**

   ![Checkbox for understanding action](image)

   I understand that I will be deleting the losing ticket, and there is no recovery from that action.

---

**Bulk Merge**

You can bulk Merge tickets from the [My Tickets](#) Grid by selecting “Bulk Merge” from the More menu at the top of the grid.

The difference with the bulk merge is that you can select multiple “loser” ticket from the grid. When you pick the winner, all selected loser tickets will be merged into the winner.

This option is controlled by a [User Rights](#) setting. It can be allowed/disallowed on a user to user basis.

**Customer Merge**

Click [here](#) to learn more about Merging Customers.
Sync a ticket with Jira

If you have followed the steps outlined in the [Jira Integration page](#), you will find the following “Sync with Jira” section on the right hand side in the ticket page. If the Jira section is not in a convenient spot, you have the option to [reorder the right hand menu of new and existing tickets](#).

If you have [multiple Jira instances](#) defined, you can hover over this section and the Jira Instance which the ticket is linked to will be displayed. The Jira instance is made automatically based on the Product selection that was made on your ticket. If there is no product selected on the ticket, the Default Jira Instance and Default Project Key will be used. Click [here](#) to learn more about configuring your Products.

<table>
<thead>
<tr>
<th>New Jira Issue</th>
<th>Development instance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Jira Issue</td>
<td></td>
</tr>
</tbody>
</table>

Creating a New Issue

Clicking in the “New Issue” button will add the ticket to the queue to sync and the Issue Key will display “Pending…”. When this process is complete, the box will change from “pending...” to the Jira ticket number with a link. To see the link you will need to refresh the ticket.

Issue Key: Pending... ✗

A new Jira Issue will be created and a remote link to the synced TeamSupport ticket will be added in the new issue.
Linking an Existing Jira Issue

Clicking in the “Existing Issue” button will allow you to enter the Issue Key to sync with:

**Existing Issue Key:**

Enter the key and click on the Save button. The Issue Key will be displayed in black font without a link to Jira. Once the sync has taken place a new remote link will be added to the synced Jira Issue and the Issue Key in TeamSupport will become a link to the Jira Issue.

Automating the Ticket Links using API

TeamSupport offers an API which allows customers to have access to their TeamSupport data from outside of TeamSupport. You may use the API to set an existing Jira ticket link, or to create a new one. Click [here](#) to learn more.

Removing a Ticket sync to Jira

Once a sync has been made, if you need to make a change to the Product selection, you will be prompted to first remove the Jira sync from the ticket.

The Product can't be changed if the Ticket is linked to Jira. Unlink ticket before changing product.
You may click the “x” at any time next to the sync in order to remove the link to Jira.

**Updating Data**

Jira Issue changes in the mapped fields listed on the [Jira Integration Page](#) will be applied to the TeamSupport ticket and new comments will generate new actions. New actions in the TeamSupport ticket will generate their equivalent new comments in the Jira Issue.

The synchronization runs approximately every 15 minutes, possibly longer depending on the number of items that need processing. Wait for at least 15 minutes after saving. Once it is done you should be able to refresh your ticket and see the updated data.

**Logging and Troubleshooting**

If your tickets are not syncing, you may look for errors in the “CRM Sync Errors” report which can be found in the [Reporting Section](#). Additionally, logging reports can be found in the CRM Sync Logs report.

Additionally, Jira errors may be logged in the Ticket History. Ticket History can be found on the Ticket Detail Page by clicking More -> Ticket History. However, errors will only be reported in the Ticket History if they are specific to the ticket. For example, if the ticket sync has failed due to an authentication issue, these errors can be found in the “CRM Sync Errors” report as described above.
Applause on a Ticket Action

The Applause feature encourages teamwork by letting users applaud other team member’s Ticket Actions, similar to the “Like” button on Water Cooler.

If a user sees an Action created by another team member that is worthy of applause, they can toggle the hand clap button on the top of the action. If this was done by mistake, the applause can be toggled off again at any time.

Hovering over the applause button shows the users who have applauded.

Additionally, a congratulatory email is sent to the action creator. This email uses the “Applause Reaction Notification” Email Template which can be modified like other TeamSupport generated emails. The email can also be disabled by deleting the body of the email template. This will prevent an email from being sent if a ticket action is applauded.
Ticket Sentiment Analysis

Edition: Enterprise

TeamSupport is leveraging IBM’s Watson technology to provide internal sentiment analysis on Ticket Actions. You may notice public Actions scored with sentiments like satisfied, polite, and frustrated, along with scoring on the Ticket.

The goal for the Watson data is to help you better understand your relationships with your Customers so that you can continue to provide them with exceptional service. Additionally, you can use the service to understand how your team’s written communications may be perceived by your Customers. This analysis can highlight training opportunities for your agents in order to improve the tone of your communications and elevate conversations with your Customers.

Ticket Sentiment is available as a weight in our CDI calculation. The two values working together will enhance your understanding of your customer health and satisfaction.

Going forward, we are planning to add Ticket Automation rules which will let you run triggers on Action sentiments.

* Please note that this data is not visible to your Customers and is only displayed internally.

Sentiments

The following sentiments are used:

- **Positive emotions:** Satisfied, Excited, Polite
- **Negative emotions:** Sad, Frustrated, Impolite, Sympathetic

The tone detector is 'tuned' specifically for support interaction, and will detect language that fits the listed emotions from the context of a Support Agent/Customer conversation. Tone is expressed by your word choices, punctuation, and the level of formality in your writing.

Here are some example sentences for each sentiment.

**Satisfied**

- Yes, that time works fine for me.
- Excellent, that worked.
- I appreciate the help with this.
Excited

- That’s awesome, thank you!
- I’m glad we were able to fit you in so quickly!
- I’m glad that solution works for you.
- I am happy to help.

Polite

- Please let me know your next availability.
- Thank you for your patience.
- May I suggest using our reference guide?
- I’d like check on a few things first.
- Could you please provide me with your ID#?

Sad

- I am very disappointed with those options.
- I really wish that hadn’t happened.
- We feel like our concerns are not being heard.

Frustrated

- This has been a very frustrating experience.
- This is not acceptable.
- I don’t like the options presented.

Impolite

- This is ridiculous.
- Your whole company is useless.

Sympathetic

- I’m sorry you’ve been having trouble logging in.
- I apologize for the inconvenience.
Scoring

Actions

Hello Shelly,

I am very sorry to hear that you have been having login issues. I have asked Cindy to help you out. You should hear from her shortly.

Please let me know if I can be of further assistance.

Regards,
Kimberly

The text of each public Action on a visible Ticket is analyzed for sentiments. Actions created by Users and Contacts are analyzed. The result may be that no sentiment was detected, or there may be one or more sentiments detected. If detected, the sentiment(s) will be listed at the top of the Action along with a percentage score which illustrates the confidence that the Action has the indicated sentiment. For example, text that is analyzed with the results of “Frustrated 66% Sad 74%” indicates with a 66% confidence that the author of the text was expressing frustration, and 74% confidence that the text expresses sadness.

You may not see this information instantaneously as it may take a few minutes to populate.

Scores 50% and above are only listed to ensure that the system is providing a confident score. When evaluating scores on Actions, it’s important to realize that 50 is the lowest calculable score. With this perspective, a score of 57%, for example, can be considered a “low” score.

Tickets

- **Status**: Closed
- **Severity**: Normal
- **Sentiment**: 386 - Frustrated Polite
- **Due Date**
Public Actions on visible Tickets created by Contacts are used to provide the Ticket with a sentiment score. The score is calculated by averaging the highest confidence sentiments of each of the Contact’s Actions. Using the above example, the “Frustrated 66% Sad 74%” Action would be interpreted as a Sad 74% Action because 74% is the higher of the two scores on that Action. Since Sad is considered to be a negative emotion, it is averaged in as a negative value (-74). If there is an additional Action with a positive sentiment such as Polite 55%, that would be averaged in as a positive number (+55). Thus the average of the two would be \((-74 + 55)/2 = -9.5\). The Ticket scores are expressed with a value in between 0 and 1000 where:

- **Negative**: 0-499
- **Neutral**: 500
- **Positive**: 501-1000

Therefore the number is scaled as follows: \((5 \times -9.5) + 500 = 453\) (rounded up). The result of 453 indicates that they system is more confident that the Ticket has negative sentiment (< 500) than positive.

**Agent Training**

Ticket Sentiment Analysis provides many opportunities for growth within your Support team. Here are a few focus points for agent training:

- Did the Customer start out frustrated at the beginning of the Ticket, but their tone improved by the end of the Ticket? How did the agent’s tone affect the tone of the Customer?
- Did the Customer’s tone turn from positive to negative? Could the Ticket have been escalated before it turned sour?
- Are there any patterns in the tones of successful agents?

**Disabling**

Ticket Sentiment Analysis can be disabled at any time in the [Admin panel](#).
“Email Ticket” Button

The “Email Ticket” button can be found under the “More” button on the top menu of the Ticket Detail page.

This button allows the Public Actions within a ticket to be emailed to one or more recipients. This means private actions are not sent in the email. A use case for this feature is if a TeamSupport User is interested in sending ticket information to a non TeamSupport user, like a co-worker, who would normally not have access to the ticket information. Not only would this allow the user to easily share this information, but the email activity will be documented as a private action for record keeping and future reference.

How Does it Work?

When the Email Ticket button is pressed, the following screen appears.

Email Ticket

Please enter the email addresses you would like to send this ticket to. (Comma separated)

Enter Comma Separated Email Addresses

Introduction

Introduction

Attach File? Click or Drop Here.

All of the information (Recipients, Introduction, and Attachments) will be captured and posted to a new private action on the ticket in order to document the email activity.
Field Definitions

- **Email Address(s):** Type in one or more email addresses separated by commas.
- **Introduction:** An Introduction may be added to the email which can include any additional detail or instruction to the recipient(s).
- **Attach File:** Files may be attached to the outgoing email. The attachments will also be included along with any other ticket attachments.

Email Template

This email can be customized using the [Ticket Email email template](#).
Each ticket grid throughout TeamSupport is laid out in the same fashion. The upper section provides quick tabs, actions and a ticket grid. If you have Ticket Views defined, they will be accessible by expanding down the My Tickets and/or All Tickets sections.

These grids have a number of powerful features which give you a great deal of control over the tickets and how you interact with them.

You can always click on one of the tickets in the grid, and it will be displayed in the adjustable review pane underneath the grid. If you double click on a ticket, it will open in a new tab.

Let’s start with the toolbar above the grid. You must select one or more tickets in order for the options to be applied. This is very powerful if you need to change multiple tickets at once. If you would like to select a large number of tickets in a row, you check the box on the first ticket, click and hold the shift button, then check the box on the last ticket. This will check the boxes of all tickets in between the first and last ticket.

**Toolbar**

- **New Ticket**: Create a new ticket.
- **Take Ownership**: This will change the owner of the ticket to you.
- **Request Update**: When someone else owns the ticket but you would like to remind them to update the ticket, clicking this button will generate an email to the ticket owner.
- **Delete**: Delete the selected ticket. Note that you can only delete tickets that you have created, unless you are an admin in which case you can delete any ticket in the system.
- **Export Tickets**: This will export the entire list of tickets displayed in the grid to a CSV formatted file.
• **Select Columns:** TeamSupport has a large number of fields which can be displayed in the grids, and this button allows you to select which fields will be displayed in your TeamSupport user. By creating a Ticket View, you can have access to more columns.

• **Show/Hide View Pane:** You may show the View Pane at the bottom of the ticket grid so that you can quickly review tickets, or you make hide it so that you have more screen space to display your tickets in the grid.

• **Refresh:** Refreshes the ticket grid

• **More:** There are additional options under the More button:

![More options]

- **Assign user:** Assigns selected tickets to a designated user.
- **Assign group:** Assigns selected tickets to a designated group.
- **Change status:** Assigns selected tickets to a designated status.
- **Change severity:** Assigns selected tickets to a designated severity.
- **Change due date:** Changes the due date on selected ticket(s).
- **Mark as read/unread:** Marks the selected tickets to Read or Unread.
- **Flag/Remove Flag:** Flags, or un-flags the selected tickets. Flagged tickets also show up under the “Flagged Tab” on the My Tickets Grid. You can automatically change flag a ticket using Ticket Automation.
- **Subscribe/Unsubscribe:** Subscribes or Unsubscribes the current user to the selected tickets.
- **Enqueue/Dequeue:** Adds or removes the selected tickets from the user’s Queue.
• **Bulk Merge**: You may select multiple tickets to merge into a single ticket.
• **Make Visible/Non-Visible to Customers**: Changes the visibility of tickets. This applies to the visibility of the entire ticket, rather than the visibility of the actions within a ticket. For example, if a ticket was once public, and you change it to private, the customer would no longer see the ticket on their Customer Hub. No emails will be sent out with this change.

You can select which fields are displayed in the grids with the Select Columns button, and you can also change the order of the fields simply by dragging and dropping the column headers. In addition, clicking on a field header will sort the grid by that column.

The following image shows the use of the various icons and buttons which are in the ticket grids.

**Options Within the Ticket Grids**

![Diagram of ticket grid options](image)

Note that you can click directly on the icon to toggle between on and off.

• **Select Ticket**: You can select multiple tickets at once.
• **Open Ticket**: The “Open Ticket” icon will change color depending on the [SLA status](#). The colors are: Red for violation, Yellow for warning, and Green for no issues.
• **Read/Unread**: Any time a ticket has a new action (from another TeamSupport user, Ticket Automation, a customer, ect.) that you have not yet read, the blue dot will appear and that line will be displayed in bold. Additionally, the number of tickets which are marked as “Unread” will be displayed in parenthesis next to “My Tickets” on the left hand navigation.
• **Flag/Unflag**: Flags, or un-flags the selected tickets. Flagged tickets also show up under the “Flagged Tab” on the My Tickets Grid. You can automatically change flag a ticket using [Ticket Automation](#).
• **Subscribe/Unsubscribe**: Subscribes or Unsubscribes the current user to the selected tickets.
• **Enqueue/Dequeue**: Adds or removes the selected tickets from the user’s Queue.

There are multiple tabs in the My Tickets section to help organize your tickets.

**Tabs**

• **Open**: Shows all of the open tickets that are assigned to you.
• **My Groups:** Shows all of the open tickets that are assigned to your group. These tickets might be assigned to other users. This is a great tool to use to quickly find tickets which are in your group that you can help to address.
• **Subscribed:** Shows all of the tickets which you are currently subscribed to.
• **Flagged:** Shows all of the tickets which you have marked with the “Flag” icon.
• **Closed:** Shows all of the tickets which were assigned to you, that have now been closed.
• **All:** Shows all tickets that are currently assigned to you, regardless of status. This includes closed tickets.
• **Queue:** This tab displays and allows you to prioritize the tickets which have been added to your Queue.
• **Reminders:** This is a Support Desk only feature. Enterprise Edition customers utilize the [Tasks](#) feature. Allows you to view and manage your ticket and customer reminders.

**Ticket Views**

Ticket Views help you to find and manage your tickets by allowing you to select columns and filter data similar to a report. Click [here](#) to learn more about Ticket Views.
Ticket Queue

The ticket queue is designed to offer better control over what you and others are working on today or over the next week. A user may have many, many tickets assigned to them, but in many cases, the user is not necessarily going to work on every single one of those tickets today or even this week.

First let's discuss the ways in which a ticket can be added to your Queue:

1. A user can click the Enqueue/Dequeue button at the top of a ticket in the Ticket Detail window.
2. From the My Tickets grid, there are two options for Queueing a ticket. The first way is to click the icon on the grid inline of the ticket, and the other is to choose the Queue option by expanding down the “More” menu. You can also select multiple tickets at a time to perform these actions.
3. Any user (especially a Supervisor) can view and manage Queue’s for all users from the User Section.
4. Ticket Automation can be configured to Enqueue/Dequeue a ticket.
5. Any user can add a ticket to their own, or someone else’s queue from the Ticket Detail window.

The image below shows what the queue looks like when you have tickets in your queue. Closed tickets appear in your Queue with strikethrough text. You may remove closed, or any tickets, from your Queue by toggling the Queue button on the ticket. If the ticket is assigned to a different user, it will be displayed in italics.

Note that the Queue tab has the same behavior as other tabs in the My Tickets section. However, you are able to prioritize your Queue tickets. You can do this by dragging and dropping the ticket in the preferred order using the “Prioritize” icon inline of the ticket:
You can add/remove/view which users have a specific ticket in their Queue from the Ticket Detail window. If you mouse over the users name, additional information is displayed. Clicking on the users name will take you to the Users section.

Want to see what tickets are in someone else’s queue? Go to the Users section and click on their Queue tab.
Subscribing to Tickets

You can subscribe yourself, or you can subscribe others to tickets. Once subscribed, when the ticket is updated, subscribed users will get an email with the ticket details. Users can unsubscribe from these updates at anytime. Subscribing is an easy way to ensure you stay in the loop on tickets that are important to you.

First let’s discuss the ways in which you can become subscribed to a ticket:

1. A user can click the Subscribe/Unsubscribe button at the top of a ticket in the Ticket Detail window.
2. From the My Tickets grid, there are two options for Subscribing to a ticket. The first way is to click the icon on the grid inline of the ticket, and the other is to choose the Queue option by expanding down the “More” menu. If you use the “More” method, you may select multiple tickets at once that you would like to subscribe to.
3. Ticket Automation can be configured to Subscribe a user to a ticket.
4. There are automatic subscription options based on your activity on a ticket that can be configured in the user section.
5. Any user can add a ticket to their own, or someone else’s queue from the Ticket Detail window.

The image below shows how tickets appear in the “Subscribed” tab under the My Tickets section. Tickets which are closed appear with a strikethrough font.

Note that the Subscribe tab has the same behavior as other tabs in the My Tickets section.
You can add/remove/view which users are subscribed to a ticket from the Ticket Detail window. You can mouse over the users name to get additional information. Clicking on the users name will take you to the Users section.

Click [here](#) to learn about how you can also subscribe to a customer so that you will be notified any time a ticket is created or modified by a customer you are subscribed to.
Reminders are a great way to stay on top of follow ups with tickets, customer accounts and individual contacts. Simply add a reminder to a ticket and an email will be sent to you on the due date.

To view a list of your reminders, go to My Tickets -> Reminders tab.

You can mark the reminder as done and remove it by checking the box next to the reminder name.

You can also hover over the reminder icon to receive additional information about the reminder. If you click on the ticket name or customer name, it will open in a new window.
In addition, you can customize the emails that are sent to you by going to Email Tab in the admin section.
Scroll towards the bottom where the templates are and edit:
Reminder – Ticket
Reminder – Customer
Reminder – Contact

Click here to learn about adding reminders to customer accounts and individual contacts.
Working with All Tickets

You will find many of the same features in the All Tickets section that you will find in the My Tickets Section. These grids have a number of powerful features which give you a great deal of control over the tickets and how you interact with them.

Ticket Views

Ticket Views help you to find and manage your tickets by allowing you to select columns and filter data similar to a report. If your organization has global Ticket Views defined, they will be accessible by expanding down the All Tickets section. Click here to learn more about Ticket Views.

Tabs

- **My [Ticket Type]**: This tab is shown when you have made a ticket type selection. For example, if you choose the Ticket Type “Support”, you will see a tab that says “My Support”. These will be open tickets, that are currently assigned to you, which are assigned to the Ticket Type “Support”.
- **Open**: This tab shows all Open tickets, filtered if Ticket Type is chosen.
- **Closed**: This tab shows all Closed tickets, filtered if Ticket Type is chosen.
- **Unassigned**: This tab shows all Unassigned tickets, filtered if Ticket Type is chosen. This is useful for showing all tickets within a specific Ticket Type which might need assigning to a User.
- **All**: This tab shows All tickets, filtered if Ticket Type is chosen.

Left Navigation Menu

All Tickets lets you see all of the tickets in the system broken down in various convenient ways. First, you can expand down the My Tickets menu to show all of your Ticket Types and Ticket Views visible to “everyone”.
You can click on each ticket type and only those tickets that have the selected ticket type will be shown in the grid. This is a filter. Each of these selections displays the following tabs to further filter the ticket results:
Tasks

Edition: Enterprise

TeamSupport very often crosses over into the realm of Project Management when there are multiple steps or actions that need to be taken and managed regarding Tickets, Customers, Contact, Products, Users, and Groups. The Tasks feature allows TeamSupport users to assign and track multiple Tasks for other users or themselves. Tasks can be “open” or associated to Tickets, Customers, Contacts, Products, Users, Groups. This way a single person, like a Project Manager or a Ticket creator, can assign various Tasks out to other users at any time. Furthermore, you can create 1 layer of Subtasks for your main Task. This allows you to add further granularity and organization to your Tasks. There is not a limit to the number of Tasks or SubTasks that can be created. Tasks can be setup with Reminder Dates and Due Dates so that deadlines are not missed.

Here are some ideas for Tasks:

- **Ticket Collaboration**: When working on a ticket, it’s common for support to involve other team members to participate in the resolution, while not losing visibility and ownership of the ticket. Add tasks for multiple people right on the ticket, and assign them individual due dates and reminders to help everyone stay in sync and provide a great customer experience.

- **Customer Check In**: It’s important for support teams to proactively check on customers they’ve helped in the past. It’s an excellent way to build rapport and strengthen the relationship. By creating a task to check in some time in the future, the support team can easily stay focused on the busy day to day ticket management, but also make time to take a moment and conduct proactive outreach that may not be related to an active issue. Just checking in to say hello goes a long way.

- **Approvals**: Ask for approval on a Ticket or Product by assigning a Task to the Approvals User or Group.

- **Documentation**: If the result of a ticket means that your documentation should be updated, ensure this happens by creating a Task for your Documentation Group.

- **Software Releases**: If a bug is reported, there are multiple Users and Groups who would need to take action on the ticket in order for it to be released.

Quick Tips

Tasks are related to these other areas of TeamSupport:

- **Associations** can be made for the following areas: Tickets, Customers, Contacts, Products, Users, Customer Activities, and Groups. See below for more information on Associations.

- **Email Templates**: There are several Email Templates that work with Tasks. These include templates for Task reminders, if someone else updates your Task, if someone else assigns you a Task, if someone else completes your Task, and when someone takes ownership of your Task.

- **Search**: There is a “Tasks” checkbox in the Search section that allows you to search through the title
and the body of the task.

- **Reports:** There is a Task table in Reports that will allow you to report against Tasks.
- **Ticket Cloning:** When you Clone a Ticket, the Tasks will also be cloned. The Tasks will be separate and will be associated with the new Ticket. If the Tasks were associated with other objects such as Group and Customer, those associations will remain.

Tasks can be found on the left hand navigation of your TeamSupport window. Two counts will be listed on the left hand navigation. The count of your overdue Tasks will be listed in red, followed by your total open tasks.

![Task grid](image)

### Field Definitions

Let’s look at the tabs along the top first:

- **My Tasks:** Lists all of the Tasks that have been assigned to you. Other TeamSupport users may assign tasks to you.
- **Assigned Tasks:** Lists all of the Tasks that you have assign out to other people. This area allows you to manage other users Tasks and manage projects that you may be in charge of.
- **Completed Tasks:** A repository of Tasks that were assigned to you which you have marked as “complete”.

Additionally you have the following buttons along the top:

- **Refresh:** Allows you to manually refresh your lists of Tasks.
- **+ New Task:** Click this button to create a new Task. There is not a limit to the number of Tasks that can be created. This can be changed later.

Finally, you have the following fields in the Task grid:

- **Checkbox:** The checkbox allows you to complete a Task. Any Task that you complete, whether it was
assigned to you or to someone else, will appear in the “Completed Tasks” Tab. When you complete a task, you have the ability to add an optional note with additional information regarding the completion of the Task. This comment along with the date of completion is stored in the Task info. You can always reverse the completed Task by unchecking the box. If your Task has Subtasks, all of your Subtasks must be completed before you can complete the main Task.

• **Name:** Give your Task a name – this is a required field.

• **Due:** You may optionally indicate a Due Date for the task. The assigned User will receive an email on the Due Date. The grid also sorts first by Due Date. * Due Dates appear on the [Calendar](#) with purple text.

• **Reminder Date:** You may optionally indicate a Reminder Date for the task. The assigned User will receive an email on the Reminder Date. The grid also sorts by Reminder Date if a Due Date is not present.

• **Associations Toolbar:** To integrate the Task into other areas of TeamSupport, you may associate the Task with a Ticket, User, Company, Contact, Group, or Product. Each of these areas will have a Tasks tab which allows you to see Tasks associated with these areas.
  - **Associate Ticket** – Search by either name or number to associate a ticket. This will cause the [Task to display on the right hand side of the ticket](#).
  - **Associate User** – Associating a user will cause the Task to appear on the Tasks page of the User section for the associated User. Email notifications are not sent to associated Users. You may want to associate a Task to a User if they need to be aware of the Task, but do not necessarily need to take action – like an Account Manager.
  - **Associate Company** – You can associate a Company to a Task. Currently, there is not a tab available under the Company section. This will be added soon.
  - **Associate Contact** – Associating a Contact will cause the Task to display under the Tasks tab in the Contact section.
  - **Associate Group** – You can associate a Group to a Task. Currently there is not a Tasks tab under the Group section. This will be added soon.
  - **Associate Product** – (Enterprise Only) You can associate a Product to a Task. Currently there is not a Tasks tab under the Products section. This will be added soon.

Tasks in this grid are sorted first by Due Date, then Reminder Date, then the date the Task was created.

Click [here](#) to learn more about updating and managing Tasks.
Add/Manage a Task

Edition: Enterprise

Enterprise Edition customers use our Tasks feature rather than Reminders, which is Support Desk only. Tasks are an extension of Reminders and allows user to assign and manage Tasks for themselves and other users.

You can view and add Tasks for tickets on the right hand side of the Ticket Detail window for existing tickets. You can also view and manage all of your Tasks from the Task section on the left hand navigation. There is also a Task tab for Customers and Contacts, Products, Group, and Users.

Tasks can be found on the left hand navigation of your TeamSupport window. Click here to learn about fields found on the main Tasks page.

Click the "+ New Task" button. The following form will display:
Field Definitions

- **Name**: This is the only required field. Similar to tickets, give your Tasks descriptive names so that they are easily identifiable from the grids. This means the assigned user will not have to open the task to understand what it is for.

- **Description**: Give your Tasks any additional details in this field. There is a editing toolbar similar to the one found in Ticket actions. For example, you can insert images, Ticket links, along with lots of formatting options.

- **Assigned to**: The default assignee will be the user who creates the Task. The assigned user can be changed at any time, and an unassigned user can be selected. Similar to Tickets, unassigned users are useful if a Task need to be made for an entire group, but doesn't necessarily need to be assigned to a particular user right away.

- **Complete**: By checking this box, the Task will be marked as complete. Completed Tasks appear under the “Completed Tasks” tab.
• **Due Date:** Due Dates on Tasks help users stick to deadlines. When a Due Date passes, the Task will appear on the grid with a red background. An email also gets sent to the assigned user when a Task becomes due. Tasks with Due Dates appear on the Calendar with purple text.

• **Reminder:** Check this box if you would like the assigned user to receive a Reminder for the Task.

• **Reminder Date:** The date and time of the Reminder is set using this field. An email will be sent to the assigned user at the Reminder time.

• **Associations Toolbar:** To integrate the Task into other areas of TeamSupport, you may associate the Task with a Ticket, User, Company, Contact, Group, or Product. Each of these areas will have a Tasks tab which allows you to see Tasks associated with these areas.
  
  ◦ **Associate Ticket** – Search by either name or number to associate a ticket. This will cause the Task to display on the right hand side of the ticket.
  
  ◦ **Associate User** – Associating a user will cause the Task to appear on the Tasks page of the User section for the associated User. Email notifications are not sent to associated Users. You may want to associate a Task to a User if they need to be aware of the Task, but do not necessarily need to take action – like an Account Manager.
  
  ◦ **Associate Company** – You can associate a Company to a Task. Currently, there is not a tab available under the Company section. This will be added soon.
  
  ◦ **Associate Contact** – Associating a Contact will cause the Task to display under the Tasks tab in the Contact section.
  
  ◦ **Associate Group** – You can associate a Group to a Task. Currently there is not a Tasks tab under the Group section. This will be added soon.
  
  ◦ **Associate Product** – (Enterprise Only) You can associate a Product to a Task. Currently there is not a Tasks tab under the Products section. This will be added soon.

• **Attachment:** You may attach a file which is relevant to the Task. Max file size is 25MB.

To Edit a Task, Click on it from one of the grids, or from the Ticket. The following page will appear:
Field Definitions

There are a few new field definitions that can be found on this page that are not already defined above:

- **Mark Complete**: This button is similar to checking the “Completed” box on the Task grid. By clicking this button, the Task will be marked as complete. Completed Tasks appear under the “Completed Tasks” tab on the Tasks grid. All Subtasks must be complete before a main Task can be marked as complete.
- **Refresh**: The refresh button will refresh the current window and bring in any changes that may have been made.
- **Trash can**: The Trash can allows you to delete a Task. Deleted Tasks cannot be recovered.
- **Created by/on**: These fields contain information on when and who created the Task
- **Subtasks**: You are able to make 1 level deep of Subtasks. This is a great option for a Project Managers, or anyone who would benefit from grouping Tasks together. For example, you can create a primary Task for Customer Onboarding, which would have several Subtasks for various meetings, documentation, training, and implementation. All Subtasks must be complete before attempting to mark a main Task as complete.
- **History**: All of the actions that are taken on a ticket will be reported in the History section.
Ticket Tags

Tags allow you to organize tickets around keywords that make sense to you. For example, you could add a tag called “Exchange” to quickly see a list of tickets that involve the exchange server.

The Ticket Tags section can be found on the left hand navigation from within your TeamSupport Window. Here, all of your tags are displayed on the right hand side of the screen grouped by first letter. When no tags are selected, all Tickets are displayed in the results window.

You can click on the tag name, and all tickets which have that tag, or use that tag in the body of an action will be displayed in the results window.

The results are displayed with the Ticket Type icon next to the Ticket Name. Other tags associated with that ticket are also displayed with each ticket. You can click on any of these tickets and it will be opened in a new tab.

You can also select multiple tags by clicking on the “Select Multiple Tags” option in the upper right hand
corner of the window. This creates an ‘AND’ clause which means the results will have all of the selected tags associated to them.

System admins can rename and delete tags. These options appear next to the tag name that is selected and are only available to Admin users.

Click here to learn how to Add a Tag to a Ticket.

In addition to relating tickets together, tagging is also used for Ticket Deflection on the Customer Hub. Click here to learn more about this feature.

Quick Tip: You can automatically add a ticket tag to a ticket using Ticket Automation.
Knowledge Base

The Knowledge Base is a great area to store documents for your internal team or for your customers to access at any time from the Customer Hub.

This section includes the following topics:

- **Type of Knowledge Base**: There are three different areas where the Knowledge Base can be displayed and used. The setup and use of the Knowledge Base will depend on the audience.
- **Knowledge Base Setup**
- **Creating a Knowledge Base Article**
- **Getting the Most out of Your Knowledge Base**: Topic include Canned Responses, Knowledge Sharing, Suggested Solutions, Content Filtering, and Reporting.
Access to Knowledge Base

There are 3 different ways to access the Knowledge Base.

**Internal Knowledge Base**

If you are a TeamSupport user, you have access to the Internal Knowledge Base. This Knowledge Base section on the left hand navigation shows all of the articles that are available to your customers, in addition to private categories and articles that only internal TeamSupport Staff will have access to.

The Knowledge Base is a great place to segregate and display helpful information such as how to configure products, use case scenarios, canned responses, tips and tricks, or various protocols that should be followed.

**Customer Hub**

You may give your Customers access to the Knowledge Base through the Customer Hub.

**Anonymous Knowledge Base**

You may display your Knowledge Base anonymously. This allows anyone who visits your Hub to have access to your Knowledge Base without needing to sign in. This is an optional setting found in your Basic.
Secure Knowledge Base

Your customers will require a secure login in order to have access to the Knowledge Base. You may optionally filter Knowledge Base articles based on Product match.

Click here to for Knowledge Base setup.

Click here to learn how to create a Knowledge Base article.
Knowledge Base Setup

The internal Knowledge Base does not require any setup. Simply create a Knowledge Base article, and it will be available for TeamSupport users. You may optionally create Knowledge Base Categories to help with organization.

Some setup is required for Customers to have access to Knowledge Base on the Customer Hub.

From within TeamSupport, browse to the Basic Hub Settings in Admin. There is a button under this section to enable/disable the Knowledge Base.

There is also a section entitled Anonymous Access Settings which will allow you to make the Knowledge Base available to those who have not logged into your Hub.

Click here to learn how to create a Knowledge Base article.
Creating a Knowledge Base Article

You may create a new Knowledge Base article, or convert an existing ticket into a Knowledge Base article. Turning a ticket into a Knowledge Base article is a great way to share a ticket with internal TeamSupport users for use case scenarios and knowledge share.

Visibility and KB Flags

There are two important flags for Knowledge Base Articles: Visibility and Knowledge Base. Both of these flags can be set at the article level, and also at the action level. This allows you the granularity to select not only which article may be visible to your Customers on the Customer Hub, but also allows you to make some actions visible on the Customer Hub, and make some private.

The proper configuration for a public Knowledge Base Article will have the Visibility and KB flags set on the ticket level, and will also have the Public and KB flag set on at least one action as described below. Additionally, the KB should be in a category that is marked “Visible on Portal”.

Article Visibility and KB flags are found on the right hand side of the article/ticket:

- Visible
- KB

Category: DBWizard Info

Action Visibility and KB flags are found at the top of each action:

Creating a New Article

Follow these steps to create a new Knowledge Base article.

1. Create a new ticket
2. Give the ticket a name. This will be the name of the article.
3. The ticket type can be anything – this does not matter. In some cases, our customers will create a ticket type called “KB”. You can read more here on how to create ticket types.
4. Set the status to Closed. Some customers have also created a status called KB Article and made this
a “closed” status – so the ticket is actually closed, but labeled as a KB Article. You can learn more about ticket status here.

5. Decide your visibility. For an internal Knowledge Base article, leave “Visible” unchecked. To give your customers access to the article from the Customer Hub, check the box for “Visible”.

6. Check the box for “Knowledge Base”. Once you check Knowledge Base, choose the optional category/subcategory.

7. Write your content in the Description field. You can also attach files to the ticket which will allow your customers to download them. You can also insert custom HTML into the Description to embed images or add URL links to other locations.

8. Click Save & Close Tab button.

9. Once saved, you may add multiple actions to a KB. If you followed the steps above, you will notice that the first action created will already have the action KB flag and will have the same visibility as the ticket. You may toggle these flags on and off on any action by hovering over the “more” menu and toggling the KB and/or Visible flag.

### Converting a Ticket to an Article

Follow these steps to turn an existing ticket into a Knowledge Base article.

1. Open the ticket into a new tab and edit the Visibility and Knowledge Base flags found on the right hand side of the ticket, as well as the Knowledge Base Category field as described earlier on this page.

2. Next, you must set the KB and Visibility flags for each action. For example, you may have several actions on the existing ticket, but only want to make one of them a visible KB action. Action Visibility and Knowledge Base flags are found on the top of each action as described earlier on this page.

### Related Information

You may filter the article by adding Products and Customers. Click here to learn more about Knowledge Base filtering.

Click here to learn how to use the Internal Knowledge Base.

Click here to see how your Customers will use the Knowledge Base.
Using the Internal Knowledge Base

Turning a ticket into a Knowledge Base article is a great way to share a ticket with internal TeamSupport users for use case scenarios and knowledge share. Internal Knowledge Base articles are not intended to be viewed by your Customers on the Customer Hub.

Click on Knowledge Base from the left hand navigation from within TeamSupport.

Here all of the Knowledge Base articles are listed including articles that your customers can see. Articles are displayed in custom categories that may or may not be visible on the Customer Hub. There are also two boxes on the right hand side that display New articles and articles that have been recently modified.

You can create a new Knowledge Base article by clicking on the +New Article button. This will automatically check the “Knowledgebase” checkbox. Click here for more on how to create a Knowledge Base article.

The Knowledge Base has a search box which allows your users to search for specific topics (note that if they leave the box blank, all Knowledge Base articles will be returned). Here is a view of the screen showing articles which match the search term.

Clicking on the KB Home at the top of the results will bring you back to the main Knowledge Base. You may click any of the results and the article will open in a new tab.

Click here to see how you can get the most out of your Knowledge Base.

Click here to use the Knowledge Base and the Customer Hub from a customers prospective.
Getting the Most out of your Knowledge Base

The Knowledge Base integrates into many other parts of TeamSupport. Browse this section to explore ways to get the most of your Knowledge Base.

Topics include:

• **Canned Responses:** If you have common responses to questions, you can save them as a canned response to insert into tickets easily.

• **Knowledge Sharing:** The internal KB is a great place to store private articles for your team.

• **Suggested Solutions (Ticket Deflection):** TeamSupport suggests solutions to your users and also your customers based on the information they have typed into a ticket.

• **Knowledge Base Filtering with Products and Customers:** KBs can be filtered with Products and Customers.

• **Create a Tutorial:** KBs can be used as internal or external tutorials using images, voice/video recordings, and/or screen recordings.

• **Reporting on Knowledge Base:** Our powerful Reporting Tool has the ability to report on Knowledge Base statistics.
Knowledge Sharing

You can turn any ticket into a Knowledge Base ticket.

Here are a few reasons why you might want to do this:

- You have recently resolved an issue for your customer, and you would like to share the results with the entire team so that they can all learn from the experience.
- You have described a procedure to a customer, and you would like to also share this procedure with your internal team or your customers.

Click here to learn how to turn a ticket into a Knowledge Base article.
Knowledge Base Filtering with Products and Customers

Please note: The Products module is only available in the Enterprise Edition.

There are several ways to filter your Knowledge Base content.

1. **Customer Filtering:** This feature is controlled by the “Customer Specific Articles” setting in the Customer Hub Basic Settings. If enabled, when you associate a Company or Contact with a Knowledge Base article, those articles will only be displayed to the associated Company or Contact. Articles without a Customer association will be displayed to all allowed customers.

2. **Product Filtering:** This feature is controlled by the “Customer Product Association” setting in Customer Hub Basic Settings. If enabled, when you associate a Product with a Knowledge Base article, those articles will only be displayed to customers who are also associated with that product. Articles without a Product association will be displayed to all allowed customers.

3. **Anonymous Hub Access:** This feature is controlled by the “Anonymous Hub Access” setting in Customer Hub Basic Settings. If enabled, anonymous visitors to your Hub will be allowed to view Knowledge Base articles. Allowing anonymous access to some Knowledge Base content may be a good way to provide prospective customers with information about your business.

Click [here](#) to learn how to associate a product to a ticket.

Click [here](#) to learn how to associate a product to a customer.
Create a Tutorial

You can create Tutorials inside of TeamSupport to display on your Knowledge Base. Along with text, you can insert Screen Recording and Screenshots into the article.

Simply create a ticket, create your recordings and/or screenshots, mark the ticket as Visible to Customers, and mark the ticket as on the Knowledge Base. Some of our customers choose to create a custom category for Tutorials, although that is not required.

Click here for a more detailed instructions on creating a Knowledge Base article.
Reporting on Knowledge Base

An important feature of the Reporting Section is the ability to track how your Knowledge Base is being used.

You can view and track the use of your knowledge base by going to Reports and selecting the “Knowledge Base Traffic” report.

![Knowledge Base Traffic Report](image)

This report will show you each individual view of an article on your knowledge base, what search term the user used to get to the article, and the IP address (for users of the public knowledge base) or username (for Customer Hub users) of the reader.

![KB View Report](image)

The “KB View Report” shows the total number of views for each article and the “useful” / “not useful” votes for each one. This will help you craft your knowledge base library by utilizing customer response to the articles.

In addition, you can also write a Custom Report against this Knowledge Base data so you can create traffic graphs like the one below:
Click [here](#) to learn how to create a custom report.
Community (Forum)

If you give your customers access to your Customer Hub you can enable Community (or what some call forums) at no additional cost and let your customers help each other, and also converse with your team.

This page will cover how to use the Community Section of TeamSupport. You will first need to configure Community for use.

Click here to learn how to configure Community in your Admin section.

You can see how your customers will use Community in our usage guides for the Customer Hub.

By default, all users have the ability to create a Community Post. Click here to learn how to change rights on a user level.

Browse to Community on the left hand navigation. The Community Grid has similar tools and behavior to the My Tickets section.

User Posting to the Community

Once you have created your categories and subcategories, navigate to Community, and click “New Ticket” at the top the grid. The ticket name will be the topic name and the description will be the body of the post.

Now select the sub category you want to post in, mark the ticket visible to customers and save it. That’s it!

Locking and Making Topics Sticky
If you want to lock the post from further customer comments, set the ticket status to Closed. It will still be visible/searchable on the Customer Hub, but your customers will not be able to comment on it further. If you want to unlock it, set the status to something other than Closed.

In some cases, community topics can become busy and important items moved to the bottom out of view. If this is the case in your community, then you have the ability to make topics “sticky”. Do to this, open the community ticket within the main TeamSupport app and set the Knowledge base flag to Yes and also make sure the ticket description is in the Knowledge base.

Example:

When you do this, you will see the word Sticky appear on those topics and they will always remain at the top of the list.
This article describes how to configure and use the Wiki section. Click here for some great ideas on how to use the Wiki.

The Wiki feature adds a very powerful knowledge management capability to TeamSupport. You can collaborate on articles which include images and documents that can be shared internally in your organization, externally via the Hub, or to the entire world.

The most basic definition of a wiki is “A website or similar online resource which allows users to add and edit content collectively.” What does collectively editing mean? Simple – If you write an article for the wiki, and someone else finds a problem with it, they can change it directly in the wiki. This means that you will no longer have stale or out of date documents.

Another key tenant of a Wiki is that all changes are logged, and you can go back to a previous version of the document at any time. If you don’t agree with the change that someone made to a document, or you simply made a mistake, just edit the document and select a previously saved version. The wiki keeps a complete track record of every change ever made to the wiki, and lets you go back and resurrect those versions whenever you want.

A wiki also lets you work together as a group on a document. Instead of e-mailing versions of documents around, you can simply use the wiki to edit the document.

Another power feature of the Wiki is that you have the ability to report against Wiki content and settings.

This page will cover how to use the Wiki Section of TeamSupport. Click here to learn how your Customers will use Wiki from your Customer Hub.

You will first need to enable Wiki for use on your Hub. To do this, go to Admin->My Portal->Customer Hub Settings-> and enable “Wiki”.

The wiki in TeamSupport has been designed to be as easy to use as possible. When you first go to the Wiki tab in TeamSupport, you will see a screen that looks like this:
The navigation on the left side allows you to quickly find the article you are looking for. Articles can be nested as many levels deep as you want so it is easy to put documents in their correct categories. Simply clicking on a document on the left will bring up the current version of that document.

To create a new wiki article, just click the Create Wiki Page (+) icon, and to edit the article click the pencil icon in the upper right of the screen.

When you click either the edit or create new icons, you will get a screen similar to the one below:

---

### New Features:

- **Ticket #10403** - Revised Customer Interface
- **Ticket #10032** - Import logging
- **Ticket #10322** - New Email button
- **TeamSupport Features.pdf**

### Bug Fixes:

- **Ticket #10455** - Access Error
- **Ticket #10543** - Email Issues
- **Ticket #10443** - Errors in Report Exports

---
This screen lets you edit the document in a format similar to elsewhere in the TeamSupport application. Most of the editing buttons should be familiar to users, but there are a couple of unique ones for the wiki.

**New Features:**

Ticket #10403 - Revised Customer Interface  
Ticket #10032 - Import logging  
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TeamSupport Features.pdf

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This screen lets you edit the document in a format similar to elsewhere in the TeamSupport application. Most of the editing buttons should be familiar to users, but there are a couple of unique ones for the wiki.

**Page Name:** Name of the Wiki Article

**Save/Edit/Delete:** The upper right hand button has the Save button, with Edit and Delete as a submenu. When you save, you will be prompted to add an optional comment.

**Privacy Settings:** Click here to learn more about Wiki article privacy.

**Toolbar**

- **Top**
Click [here](#) to learn about the buttons that can also be found on ticket actions.

- **Insert User Timestamp**: Inserts a timestamp with the user’s name
- **Insert Wiki Article**: One of the most powerful features of a Wiki is the ability to link from one article to another. The insert Wiki Article menu will allow you to select from any Wiki article to insert a hyperlink to that document.
- **Hyperlink/Document Manager**: Insert a hyperlink into your document. This button also allows you to access the [Document Manager](#).
- **Insert Table**: The button allows you to add a custom table to your Wiki Article.

**Bottom**

**Sub Article of:**

**Version History**

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Edited by</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11/14/2014 7:34 PM</td>
<td>Kimberly Cook</td>
<td>Updated to add public visibility</td>
</tr>
</tbody>
</table>

- **Sub Page of**: Here is where you indicate the hierarchy of your Wiki articles. An article with None as the Sub Page will be a top level article. A note regarding privacy and sub-articles on the Customer Hub: A sub-article will inherent the privacy setting of it’s top-level (or parent) article. For example, if a sub-article is public, but it’s parent article is private, the sub-article will not be displayed on the Customer Hub. In order for a sub-article to be displayed, it must be marked public and it’s parent article must be marked public.

- **Previous Versions**: As mentioned above, every version of every wiki article is stored, and the list on the bottom shows each version, the time it was saved, and any comments that were left by the user. To go to one of these versions, simply click on the preview button for this version and it will be displayed in the edit pane.
Uses of the Wiki

The Wiki feature is a great capability within TeamSupport, but we often get a variation of the “What do we do with it?” question.

This help article will try to give you a few ideas of what we see the Wiki being used for. Please keep in mind that you can report against Wiki content and settings.

Knowledge Base

TeamSupport already has Knowledge Base tickets, but these are limited to ticket types. The Wiki is much more free form and can support embedded images and documents better than a standard ticket can. Ideally a Knowledge Base will have both tickets and Wiki articles.

FAQ

The Wiki is a great place to create a Frequently Asked Questions (FAQ) document. You can mark the article as “Public” then simply link to the article on your web page. The article is hosted within TeamSupport and this lets you make changes to the FAQ document without having to deal with a webmaster or someone who has access to the main website.

Project Management

At TeamSupport we use the Wiki when we are in the initial design phase for new features. The design document becomes a “living document” that all team members can edit and add their comments to. Of course, we can also put screen mockups and other details into the document as well.

Some Internal Fun

All work and no play makes customer service a dull place. The Wiki is a great place to have a little fun and can be treated as a virtual "bulletin board" for family pictures, office parties and other social events.

Technical Documents

Most support departments have various technical documentation articles floating around. The Wiki can be used to consolidate these and when the article is marked Public the Tech Docs can be searched and viewed by your customers as well. Some good examples may be an on-site installation summary, installation/setup checklists, and so on.
Common Internal Documents

With the ability to create sub-articles, you can neatly organize vacation policies, travel policies, “what to do if” documents and many more.

Be creative! This feature is very flexible and designed to help better organize your operation.
Wiki Privacy Settings

There are 3 levels of privacy for Wiki Articles.

- **Visible on Portals**: This option will give your customers access to this article on your Customer Hub.

- **Private Article**: You can elect to make the article private so that only you can see it. This is useful if you are working on a document and are not ready to release it yet – Simply mark it private and no one else can see it.

- **Publicly Visible**: The link is available to copy on the main page Wiki page next to the “Edit” button:
The Document Manager is used to store documents that you can later insert into Tickets, Knowledge Base, and Wiki Articles.

You can upload a new document, or insert an existing document into your Wiki article by clicking on the Link button from the Wiki toolbar, and then clicking the Document Manager (browse) button.

When clicked, the following window will appear. You can choose from previous uploaded images, or you can upload images to the editor, then insert. You can also organize images into folders.

Important Note: There is no individual security on the documents in the Wiki. Even if you mark a wiki article as private, the documents and images you upload are visible to everyone within your company when viewing the documents and images folder.
Search – Advanced

TeamSupport offers a powerful search tool which allows you to find Tickets, KB articles, Customers, and Contacts quickly. You can also perform advanced filters and sorting to better narrow down your search.

Advanced Search

- **Search Bar:** Type your word or words into the search bar to return your results.
- **Tickets, KB, Customers, Contacts Buttons:** Click the area of TeamSupport where you would like to search. The default is Tickets.
- **Results:** Results are displayed with Ticket Number, Ticket Name, Date Created, Date Modified, and Status. You can click on any result, and it will open in a new tab.
- **Switch to Classic Search:** This button will allow you to toggle between Classic Search and the New & Improved Advanced Search.
- **Sort By:** The default is Relevance. The drop-down menu will display other options by which to sort the results.
- **Filters:** Filtering is optional. Add a filter by clicking in the “Add a Filter” box. Once a selection is made, you will have the option to define your search criteria. You may add multiple filters to a single search by clicking again in the “Add a Filter” box. When you add a filter, the results will update automatically.

Field Definitions

- **Search Bar:** Type your word or words into the search bar to return your results.
- **Tickets, KB, Customers, Contacts Buttons:** Click the area of TeamSupport where you would like to search. The default is Tickets.
- **Results:** Results are displayed with Ticket Number, Ticket Name, Date Created, Date Modified, and Status. You can click on any result, and it will open in a new tab.
- **Switch to Classic Search:** This button will allow you to toggle between Classic Search and the New & Improved Advanced Search.
- **Sort By:** The default is Relevance. The drop-down menu will display other options by which to sort the results.
- **Filters:** Filtering is optional. Add a filter by clicking in the “Add a Filter” box. Once a selection is made, you will have the option to define your search criteria. You may add multiple filters to a single search by clicking again in the “Add a Filter” box. When you add a filter, the results will update automatically.
Boolean for Classic Search

Boolean search is for Classic Search ONLY. It is not available in the New & Improved Advanced Search.

Boolean searches are fully supported as well when more direct search results are required. Boolean searches allow you to combine words and phrases using the words AND, OR, NOT and NEAR (otherwise known as Boolean operators) to limit, widen, or define your search. Noise words, such as “if” and “the”, are ignored in searches.

Search terminology and connector examples:

- apple and pear: Both words must be present
- apple or pear: Either word can be present
- apple w/5 pear: Apple must occur within 5 words of pear
- apple not w/12 pear: Apple must occur, but not within 12 words of pear
- apple and not pear: Only apple must be present
- name contains smith: The field name must contain smith
- apple w/5 firstword: Apple must occur in the first five words
- apple w/5 lastword: Apple must occur in the last five words

If you use more than one connector (and, or, contains, etc.), you should use parentheses to indicate precisely what you want to search for. For example, apple and pear or orange could mean (apple and pear) or orange, or it could mean apple and (pear or orange). For best results, always enclose expressions with connectors in parenthesis.

Example:
(apple and pear) or (name contains smith)

Wildcard

Search terms may include the following wildcard characters:

- *: Matches any number of characters
- ?: Matches any single character
• =: Matches any single digit

For example:
appl* would match apple, application, etc.
cipl * would match principle, participle, etc.
appl? would match apply and apple but not apples.
ap*ed would match applied, approved, etc.
N=== would match N123 but not N1234 or Nabc

Use of the * wildcard character near the beginning of a word will slow searches somewhat.

**Fuzzy**

• % for Fuzzy searching. Fuzzy searching will find a word even if it is misspelled. Fuzzy searching can be useful when you are searching text that may contain typographical errors (such as emails), or for text that has been scanned using optical character recognition (OCR). There are two ways to add fuzziness to your searches:

Examples:
ba%ana: Word must begin with ba and have at most one difference between it and banana.
b%%anana: Word must begin with b and have at most two differences between it and banana.

**Phonic**

• # for Phonic searching. Phonic searching looks for a word that sounds like the word you are searching for and begins with the same letter. To search for a word phonically, put a # in front of the word in your search request.

Examples:
#Smith would also find Smith and Smythe

**Stemming**

• ~ for Stemming. Stemming extends a search to cover grammatical variations on a word. To add stemming selectively, add a ~ at the end of words that you want stemmed in a search.

Examples:
fish~ would find fish and fishing
applied~ would find applied, applying, applies, and apply

**Synonym**

• & for Synonym searching. Synonym searching finds synonyms of a word that you include in a search request. You can also enable synonym searching selectively by adding the & character after certain
words in your request.

Examples:
&fast would also find quickly

**Numeric Range**
- ~~ will search for a numeric range. A numeric range search is a search for any numbers that fall within a range. To add a numeric range component to a search request, enter the upper and lower bounds of the search separated by ~~. A numeric range search includes the upper and lower bounds.

Examples:
apple w/5 12~~17: This request would find any document containing apple within 5 words of a number between 12 and 17 (upper bound and lower bound).

**Regular Expression**

- ## for Regular Expression searching. Regular expression searching provides a way to search for advanced combinations of characters. A regular expression included in a search request must be quoted and must begin with ##.

Examples: Apple and “##199[0-9]” Apple and “##19[0-9]+”

When used in searching, a regular expression must match a single whole word. For example, you could not search for “apple pie” with a regular expression “##app.*ie”. The beginning of line and end of line regular expression markers ^ and $ cannot be used in searches.
Special characters in a regular expression are:

<table>
<thead>
<tr>
<th>Regular expression</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>. (period)</td>
<td>Matches any single character. Example: &quot;sampl.&quot; would match &quot;sample&quot; or &quot;samp1Z&quot;</td>
</tr>
<tr>
<td>\</td>
<td>Treat next character literally. Example: in &quot;$100&quot;, the \ indicates that the pattern is &quot;$100&quot;, not end-of-line ($) followed by &quot;100&quot;</td>
</tr>
<tr>
<td>[abc]</td>
<td>Brackets indicate a set of characters, one of which must be present. For example, &quot;sampl[ae]&quot; would match &quot;sample&quot; or &quot;sampla&quot;, but not &quot;sampix&quot;</td>
</tr>
<tr>
<td>[a-z]</td>
<td>Inside brackets, a dash indicates a range of characters. For example, &quot;[a-z]&quot; matches any single lower-case letter.</td>
</tr>
<tr>
<td>[^a-z]</td>
<td>Indicates any character except the ones in the bracketed range.</td>
</tr>
<tr>
<td>.* (period, asterisk)</td>
<td>An asterisk means &quot;0 or more&quot; of something, so .* would match any string of characters, or nothing</td>
</tr>
<tr>
<td>.+ (period, plus)</td>
<td>A plus means &quot;1 or more&quot; of something, so .+ would match any string of at least one character</td>
</tr>
<tr>
<td>[a-z]+</td>
<td>Any sequence of one or more lower-case letters.</td>
</tr>
</tbody>
</table>

Our search uses the TR1 implementation of regular expressions, which provides many capabilities beyond what is described above. For more details on TR1 regular expression capabilities, please see this Microsoft article:

Limitations

(1) A regular expression must match a single whole word. For example, a search for "##app.*ie" would not find “apple pie”.

(2) Only letters are searchable. Characters that are not indexed as letters are not searchable even using regular expressions, because the index does not contain any information about them.

(3) Because our search index does not store information about line breaks, searches that include begining-of-line or end-of-line regular expression criteria (^ and $) will not work.

(4) No case or other conversion is done on regular expressions, so a regular expression must match the case of the information stored in the index. If an index is case-insensitive, all letters in the regular expression must be lower-case. If a character is not searchable in the index, then it cannot be included as a searchable character in the regular expression. Non-searchable characters in a regular expression are not ignored as they are in other search expressions.
Performance

A regular expression is like the * wildcard character in its effect on search speed: the closer to the front of a word the expression is, the more it will slow searching. “appl.*” will be nearly as fast as “apple”, while “.*pple” will be much slower.

Searching for numbers

The = wildcard, which matches a single digit, is faster than regular expressions for matching patterns of numbers. For example, to search for a social security number, you could use “=== ==” instead of the equivalent regular expression.
Customer Chat Functions

Customer Chat provides an additional channel for your customer to reach your Support team. Some of your customers may never use chat, but others may gravitate to this method if it is available. It is good to provide several different channels of communication and let your customers decide which one they prefer.

**Enterprise Edition Only:** TeamSupport’s Customer Chat has integrated screenshare and video share. This lets you effortlessly switch to a more interactive session should the need arise.

Let’s discuss a few things about Chat before we go on:

- **Customer Chat is an optional feature:** It can be easily disabled. Some of our new customers choose to leave chat off when they first start with TeamSupport, and then turn it on later once they are comfortable with the basics of TeamSupport. If you choose to disable it, you can re enable it at any time.
- **Offline Chats:** If a Customer initiates a chat when there are no Support agents available, a ticket will be automatically created for this chat with the title “Offline Chat”.
- **Missed Chats:** If a Customer initiates a chat and a Support agent does not answer the chat within 180 seconds, a ticket will be automatically created for this chat with the title “Missed Chat”. The Customer will receive a message to let them know that the chat was cancelled due to unavailable agents, but that a ticket was created.
- **Multiple Chats:** A user can work on multiple chats a one time.
- **Customer Associations:** If a customer is logged into the Hub when they initiate the chat, they are automatically associated with the chat and any subsequent ticket that is created. If you display your chat widget publicly (like on your website), the customer will be required to indicate their email address. TeamSupport attempts to match the customers email address with an account record. If a match is found, the chat and any subsequent ticket will be associated with the customer record. In the absence of an exact email match, the system will search for a domain only match. If this is found, a new Contact will be created with the matching Company. If no matches are found, one will be created under **Unknown Company**.
- **Customer Access:** It is very common for our customers to put a chat button inside of the secured area Customer Hub. However, you may want to make your customer chat available on a more public basis. For example, you may want to put your chat button on your website so that anyone may initiate a chat. To do this, simply copy and paste the provided HTML chat code anywhere you would like a chat button to appear to your customers. You may customize this HTML to have whatever button you would like.
- **Group Specific Chat:** A chat icon on your website may be Group specific by adding a parameter to the icon URL. You can learn more about how to make a Chat Group specific in our Chat Setup page.
- **Chat History:** You may access chat history through the Reporting Tool at any time by using the primary table “Chat Requests”. You may also build a report on this information to determine how many chats your team has missed by filtering on the field “Was accepted” = False.
How will your Customers use Chat?

This section discusses how to use the Chat section from within TeamSupport. We have guides that explain how your customers will use Chat from the Customer Hub.

Chat Setup

You must first setup Customer Chat – click here to learn how.

New Chat Alerts

To begin receiving chats, you must first sign on. You can toggle between Online and Offline from the button at the top right hand corner of the TeamSupport window:

Several things happen with “online” chat users when a customer submits a chat:

• A “chime” will sound indicated a new chat is available.
• A browser pop up indicating a new chat is available. The first time you receive a browser notification, your browser will prompt you to accept it. Read more here.

• Like similar ticket notifications, a browser notification is displayed on the TeamSupport screen:

• The chat will become available in the chat window to accept.
You may read over the initial chat information to decide if you would like to accept the chat. If you do not wish to accept the chat, you may simply ignore it. Another user may accept the chat, or if no users accept the chat after 180 seconds, the customer will receive a message letting them know that an agent is unavailable and that a ticket will be created for their request. The customer will be associated with the ticket, and the ticket name will be called “Missed Chat”.

**Accepting a Chat**

A user may accept multiple chats at one time by clicking the Accept button on a new chat request. When a user accepts a chat, it will appear in the lower lower left hand window in green. Users can toggle between active chats:

Chat features:
• **Leave Chat**: Disconnects the chat session with the customer. The customer will receive a message that the user has disconnected from the chat. The customer will not automatically receive any chat history unless a ticket is created for the chat.

• **+ Invite Agent**: Invite co-workers to a customer chat. This is great for group chats or a warm hand off of the customer between TeamSupport users. To use this, simply click this button while in a chat. Type in a co-worker’s name and invite them in. They will receive a message letting them know of the invite. You can invite as many co-workers as you wish. Once the other TeamSupport user is in the chat with you and the customer, you can simple click the Leave Chat button. This will leave your co-worker and the customer in the chat for completion.

• **Suggested Solutions**: This feature is also available on tickets. With Suggested Solutions, TeamSupport will suggest KB articles based on the keywords in the chat conversation. You can also type in the name or number of a KB article. The article text/graphics can be inserted into the chat conversation, or a link can be sent.

• **Attachment**: You have the option of attaching a file to send to your customers. For example, you may need to send a PDF or a screenshot of settings that they have a question about. The maximum file attachment size is 25MB per file.

• **Ticket**: Drop down menu contains the following additional options:
  - **Create Ticket**: A very powerful feature is to tie chats to tickets and customers. Clicking this button will open the new ticket window and allow you to create a ticket that will capture the entire chat session. It is important to note that you can create a ticket while in an active chat and it will capture all of the chat history that has already happened. If you continue to chat with the customer, the ticket will also update the ongoing conversation.
  - **Open Ticket**: View the ticket that was created via the chat. Clicking this button will open the ticket in question in a new tab for you to view the details.
  - **Add to Ticket**: If you already have a ticket created and want to add a chat conversation to an existing ticket, select this button. Doing so will open a window where you can type in a keyword or a ticket number. Any conversation you have in this active chat will be added to the ticket.

• **Chat conversation/history**: The main window on this screen is the chat conversation/history. Anything typed by the customer and the agent will be displayed in this window in sequential order. Attachments and other actions (such as audio/video requests) will also be logged.

• **Send**: The box at the bottom of the window is where you type in your new message. Clicking the send button will post the comment for your customer to view. This cannot be undone.

• **Go to Audio / Go to Video / Share Screen**: Edition: Enterprise Only If chatting is text and pictures is not enough, TeamSupport allows you to switch sharing audio, video, and your screen. Screen Sharing does require a browser plugin for both the client and the agent side for Screen Sharing.
Screen, Audio, and Video Sharing on Chat

Edition: Enterprise Only

Customer Chat provides an additional channel for your customer to reach your Support team. Some of your customers may never use chat, but others may gravitate to this method if it is available. It is good to provide several different channels of communication and let your customers decide which one they prefer.

TeamSupport’s Customer Chat has integrated screen, audio, and video sharing. This lets you effortlessly switch to a more interactive session should the need arise.

A browser plugin may be required in order for both parties to use these functions. The plugin needs to only be installed one time and may not be necessary for Firefox and Internet Explorer browsers. The prompt will be similar to the following based on the browser:

On both the client and the agent side, three buttons are available during an active chat:

- Go to Audio
- Go to Video
- Screen Share

Let’s explore these in more detail:

Go to Audio

Sometimes communicating with your customers is better to do over voice, rather than over text. In these
cases, you, or your customer, can simply invite the other to speak over audio. This does not require anything to be downloaded on either the client or the agent side.

To use audio on a chat, either the agent or the customer can click the “Go to Audio” button:

![Go to Audio button]

This will send a message to the other party indicating that an audio session has been requested:

**Kimberly Cook**

*Kimberly Cook wants to share audio with you. Do you Accept?*

*01/24/2017 07:02 AM*

This request can be ignored, or if “Accept” is clicked, a Mute and Stop button will be displayed that will allow an audio conversation between the two parties:

![Mute and Stop button]

Along with the stop and mute buttons, the chat window will contain a sound meter gauge to indicate when the other person is talking. Either party can simply press the stop button to end the audio session.

**Go to Video**

One step beyond audio is communicating over video. This is accomplished via a webcam from the agent and client computers. Sharing video would give you a great opportunity to have “face to face” communication with your customers. Also, if you have a physical product that you sell which the customer would benefit from showing your agents, this can be done via this video feature.

To use video on a chat, either the agent or the customer can click the “Go to Video” button:

![Go to Video button]

This will send a message to the other party indicating that a video session has been requested:
This request can be ignored, or if “Accept” is clicked, a separate window will be launched that will allow an audio conversation between the two parties:

This window contains a mute button. Either party can simply close their window to end the video session.

**Screen Share**

In addition to audio and video share, another useful tool is to have the ability to share your screen with between agent and customer. For companies whose primary business relies on a computer, this is an invaluable tool. Customers and agents will be able to initiate a screen share session which by default also includes voice. At any point during the chat if it becomes apparent that a screen share would be useful in order to troubleshoot, it can be initiated by either customer or agent.

To use screen share on a chat, either the agent or the customer can click the “Screen Share” button:
Depending on the browser, a prompt will be appear to allow a screen selection to be made:

![Share your screen](image)

This will send a message to the other party indicating that a screen share session has been requested:

![Screen Share Request](image)

This request can be ignored, or if “Accept” is clicked, a separate window will be launched that will allow an screen sharing between the two parties:
This window contains a mute button. Either party can simply close their window to end the screen share session.

Additionally, whoever started the screen share also has a mute and pause button on their main chat screen window:
Water Cooler – Advanced

The easiest way to think of the Water Cooler is as a Facebook-type social network that only people in your company can access. You can post questions, have conversations, and even chat one on one with your colleagues. Basically, it’s a way for you to collaborate more closely with your company to better support your customers.

Quick Tip: You can automatically add a Watercooler post using Ticket Automation. A usage example for this is to give a high five to your team when your customers leave positive ratings on tickets, or if they closed a urgent ticket quickly. Also, you can post urgent ticket notifications to the Water Cooler.

Here is what the Water Cooler looks like:

If you would like to add a new post, click where it says “Share to Watercooler”. The following form will appear:
Share Toolbar

- **Add Attachment**: Add an attachment to the post. Max file size for attachments is 25 MB.
- **Associate Ticket**: Search by either name or number to associate a ticket.
- **Associate User**: Associating a user will give only you, and the associated users visibility to the post. Users avatars are uploaded in the [User Section](#).
- **Associate Company**: Associating a Company will cause the Water Cooler post to display under the Water Cooler section in the Company tab
- **Associate Group**: Associating a Group will cause the Water Cooler post to display under the Water Cooler section in the Group tab
- **Associate Product**: (Enterprise Only) Associating a Product will cause the Water Cooler post to display under the Water Cooler section in the Product tab
- **Associate Activity**: Customer Activities organize non-ticket related information that the whole team can use to understand and build the Customer relationship. You may associate a Water Cooler post to a Customer Activity in order to notify others on your team.

If you make an association, once you add the post, you will see a little “i” icon to the right. When people hover over this, they can see the associations and click them to open in a new tab.

Also, when someone posts something new in the Water Cooler, everyone else will receive an audio and a visual indicator. The Water Cooler menu on the left navigation will display the unread posts for that user.

**Water Cooler and Tickets**

You can click on the Water Cooler link within a ticket and start a post. When you do this, the ticket is auto associated. For example, if you are working on a ticket and want to ask your team a question, simply click...
on the Water Cooler link within the ticket and add your post. It will appear in the ticket in sequential order along with the actions, but also the main water cooler section as well.

You can filter out the Water Cooler posts by clicking the blue WC button in the upper right hand corner of the ticket.

**Water Cooler and Customers**

Each customer record has their own Water Cooler tab which will show all of the posts that have been made about this customer – and just like tickets, you can start a post from the customer section/Water Cooler tab. Doing it this way will auto associate the customer to the post, but you can also associate tickets, groups, other customers, users and products as well from here.
You can limit who sees each post by individual user as well as groups. For example, if you wanted to share something to your support team, but hide it from the other groups, simply associate the post to your group. Only those within that group will see the post. The same applies if you associate a team member to the post. Only they will see it and be able to comment on it.
TeamSupport offers an integrated team Calendar solution in order to provide extended collaboration across your organization. The TeamSupport Calendar can be used to display Ticket Due Dates, Reminders, and to add personal or team events such as Projects dates, Onsite Customer visits, User Vacations, Support Rotation schedules, and much more! Additionally, the real power of the TeamSupport Calendar is when you make associations to Tickets, Users, Companies, Groups, and Products.

There are several areas inside of TeamSupport to view the Calendar. For example, to view items for only a specific Customer, you can browse to the Customer and view their Calendar tab.

Please note that User Rights apply to all of the Calendar views. This means that if an Event is associated with a Ticket, Group, or Customer that a user does not have access to, that Event will not appear on their Calendar views.

Calendar views

- **Main Calendar** – From the left hand navigation, browse to Calendar. Displays all of the events that are visible to you.
- **Group Calendar** – Displays all of the events that are associated with the selected Group.
- **Ticket Calendar** – Displays all of the events that are associated with the selected Ticket.
- **Customer Calendar** – Displays all of the events that are associated with the selected Customer.
- **Product Calendar** (Enterprise Only) – Displays all of the events that are associated with the selected Product.

Top Menu

- **Browse buttons** – Select the forward or backward browse buttons to navigate the calendar in Month,
Week, or Day view.

- **Today button** – This button will bring you back to today’s date in Month, Week, or Day view. Today’s date is always shown with a tan background.

- **Month/Week/Day** – Select a date, and then click Month, Week, or Day to zoom in or out based on your selection. For example, if you click April 5th, then click Day, the Calendar will display only April 5th. If you click Week, the Calendar will display the week of April 5th.

- **Subscribe to a Calendar** – Click the subscribe button in the upper right hand corner of the main Calendar. A URL will be displayed which you can add to any other calendar which uses the iCal standard calendar subscription. A common use for this would be for your Google Calendar to subscribe to your TeamSupport Calendar. The Subscribe feature is only available in the main team Calendar, and not in other Calendars like Group and Ticket areas.

- **Plus button (+)** – Adds an Event to your Calendar. Click [here](#) to learn more.

Events can be one of the following:

- **Ticket Due Dates**: Displayed in Red
- **Ticket Reminders** and **Customer Reminders**: Displayed in Blue
- **Manually added Event**: Displayed in Green
- **Task with Due Date**: Displayed in Purple

**Additional Calendar Functions:**

- [Add Event to calendar](#)
- [Manage an Event](#)
Add a Calendar Event

You may want to add personal or team Events to your TeamSupport Calendar. Events might include Projects dates, Onsite Customer visits, User Vacations, and Support Rotation schedules.

Begin by choosing a Calendar view. Depending on which Calendar you choose, your Event will automatically become associated with that object.

Calendar views

- **Main Calendar** – From the left hand navigation, browse to Calendar. Displays all of the events that are visible to you.
- **Group Calendar** – Displays all of the events that are associated with the selected Group.
- **Ticket Calendar** – Displays all of the events that are associated with the selected Ticket.
- **Customer Calendar** – Displays all of the events that are associated with the selected Customer.
- **Product Calendar** (Enterprise Only) – Displays all of the events that are associated with the selected Product.

Please note that User Rights apply to all of the Calendar views. This means that if an Event is associated with a Ticket, Group, or Customer that a user does not have access to, that Event will not appear on their Calendar views.

Next, double click on any date to display the following form:
• **Title:** This title will show up on the Calendar display. This field is required.

• **Start and End Date/Time:** These two fields allow you to enter a start and end time and date.

• **All Day Event:** This checkbox will indicate that the event will last all day. Time fields will be removed from the previous two fields. An All Day Event may span multiple days.

• **Holiday:** A holiday event will appear as an all day event in your calendar with a green background. You can use your Holidays to “pause” your [SLA timers](#).

• **Description:** The description field allows you to enter additional information for your event. This field is visible when you choose to “view” the event after it has been created.

**Association Toolbar**

The real power of the TeamSupport Calendar is when you make associations to Tickets, Users, Companies, Groups, and Products. To integrate this Event into other areas of TeamSupport, you may associate the Event with a Ticket, User, Company, Group, or Product.
• **Associate Ticket** – Search by either name or number to associate a ticket. This will cause the Event to display on Calendar section of the Ticket.

• **Associate User** – Associating a user will give only you, and the associated users visibility to the Event. If you associate the event to yourself, it will only be visible to you.

• **Associate Company** – Associating a Company will cause the Event to display under the Calendar section in the Company tab

• **Associate Group** – Associating a Group will cause the Event to display under the Calendar section in the Group tab

• **Associate Product** – (Enterprise Only) Associating a Product will cause the Event to display under the Calendar section in the Product tab

Click [here](#) to learn about Managing Events.
Manage Calendar Events

Events can be one of the following:

- **Ticket Due Dates** – Displayed in Red
- **Ticket Reminders** and **Customer Reminders** – Displayed in Blue
- **Manually added Events** – Displayed in Green

Viewing, Editing, and Deleting Events

Click any event to display a quick review.

- **Delete** – Deleting an Event will permanently remove the Event system wide for all users.
- **View** – Click this link to see the Event in detail. The following Add/Edit form will be displayed:
Drag and Drop

From any main Calendar view, you may Drag and Drop an event from one date/time to another.

Please note that non-admins do not have rights to edit or delete events created by other users. If this is the case, all options on this form will be unavailable to edit.

You may make changes as necessary, then click save. Click here to learn about making Event associations using the Association toolbar.
Changing Event Duration

From the Month and Week views of any Calendar, you may change the duration of “All Day” events by hovering over the end of the Event. An arrow will appear that allows you to shorten or lengthen the Event duration.

From the Week and Day view of any Calendar, you may shorten or lengthen dates with start and end times by using the pull bar at the bottom of the Event. An arrow will appear that allows you to shorten or lengthen the Event duration.
User Account Settings

The User section is where all TeamSupport users are added and defined.

Tabs

- **User Information**: Contains information about the user and user settings
- **Open/Closed/All Tickets**: You can view all tickets for any user using these tabs
- **Ticket Queue**: View/Edit a users Queue
- **History**: This tab is only available to users who have Admin access. This will show all activity that a user takes inside of TeamSupport.
- **Ratings**: You can give your Customers the option of rating their support experience.
- **Tasks**: You can assign Tasks to Users. This is useful if a User needs to be aware of a Task, but doesn’t necessarily need to take action on it – like an Account Manager.

Additional Information on this page

- **Search**: To search for users, begin typing their name in the search bar and the list will narrow down.
- **Hide Inactive**: Click this button to hide all users who have been marked as Inactive.
- **Number in ()**: The number in parenthesis next to their name indicates the number of open tickets they have.
- **+ Button**: Click the plus button to add a new user. Click [here](#) to learn about adding a new user.
- **Trash Can**: Click this button to delete a User. This option is only available to Administrators.
Manage Users

Click [here](#) to learn about Adding a New User.

**User Status**

TeamSupport users who are Admins can also change any other user’s status by clicking on the online/offline button next to their name on the list of users.

This is useful if a user became unavailable unexpectedly due to illness, for example. This way, the user would not be considered for a [Ticket Automation](#) rule based on user availability.

**User Information**

<table>
<thead>
<tr>
<th>Name</th>
<th>Pam Beesly</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td>Hard Worker</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td><a href="mailto:pam@bitsandbytes.com">pam@bitsandbytes.com</a></td>
</tr>
<tr>
<td><strong>Website</strong></td>
<td>http://</td>
</tr>
<tr>
<td><strong>User Information</strong></td>
<td>No Additional Information</td>
</tr>
<tr>
<td><strong>User Type:</strong></td>
<td>Unassigned</td>
</tr>
<tr>
<td><strong>Region:</strong></td>
<td>Unassigned</td>
</tr>
<tr>
<td><strong>LICENSE:</strong></td>
<td>Unassigned</td>
</tr>
<tr>
<td><strong>Email Alias</strong></td>
<td>Pam Beesly</td>
</tr>
<tr>
<td><strong>Use Email Alias</strong></td>
<td>No</td>
</tr>
</tbody>
</table>
• **Edit**: Users can upload an image which is used in the Water Cooler, Ticket Page, and outgoing emails.

• **Name**: The name which is displayed in various places in the application including for customer facing areas.

• **Title/Website/User Information/Phone/Address**: Optional information that you can save on a per user basis.

• **Email**: This is the email for the support agent. For example jdoe@yourcompany.com. This email is used for internal email purposes, and is not shared with your customers.

• **Custom Fields**: You may include any number of Custom Fields for Users.

• **Email Alias**: Users may include a personalized Email Alias that will be used on emails that are generated from public actions that they create. For example, a user may want to use their name as their Email Alias. If this field is left blank, the system information will be used. The setting “Use Email Alias” controls whether or not this field is used on a per user basis. The setting “Restrict User From Modifying Email Alias” can be found in the User Rights section, and controls whether or not a Non-Admin user is allowed to modify this field. Finally, the setting “Mask Outbound email on the From line to use TeamSupport user’s Alias on public action updates” found in Email Settings controls whether or not to use Email Alias from the organizational level.

• **Use Email Alias**: This setting controls whether or not to use the user-defined Email Alias. When false, the system Email Alias will be used. The setting “Restrict User From Modifying Email Alias” can be found in the User Rights section, and controls whether or not a Non-Admin user is allowed to modify this field.

• **Signature**: Each user can load an individual signature which may include a company logo.

• **Groups**: Displays the groups that the user is a member of.

• **Two Factor Verification**: Displays the cell phone number inputted by the user for the optional Two Step Verification feature. Should this number be entered incorrectly, or should it change, Administrators can update this number for users.
Once the user has been added, you will see their info. Anything with blue text can be clicked on for edit and saves in real time.

**Account**

![Account Table]

Some options are not available/editable for non-Admins.

- **Active**: Identifies if a user is Active or Inactive. Please note that making a user inactive does not reduce your seat count automatically.
- **Activated On**: Displays when a user was first activated.
- **Last Logged In**: Displays when a user last logged into TeamSupport.
- **System Administrator**: Allows the user to make system changes to the account.
- **Customer Chat User**: Indicates if the user is able to accept customer chat requests. You can read more about Chat [here](#).
- **Password**: Click [here](#) to learn more about password resets.

**User Interface**

![User Interface Table]

- **Timezone**: Sets the user timezone. There is also a global timezone setting under Admin->My Company.
- **Date Format**: Sets the user date format. There is also a global date format setting under Admin->My Company.
- **Default Font Family and Size**: Sets the user default Font Family and Size. There are also global font
settings under Admin->My Company.

Email Notifications

<table>
<thead>
<tr>
<th>Email Notifications</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Ticket</td>
<td>Yes</td>
</tr>
<tr>
<td>Assigned Group</td>
<td>No</td>
</tr>
<tr>
<td>Unassigned Group</td>
<td>Yes</td>
</tr>
<tr>
<td>Disable Group Ticket Emails During Business Hours</td>
<td>No</td>
</tr>
<tr>
<td>Subscribe To Tickets I Create</td>
<td>Yes</td>
</tr>
<tr>
<td>Subscribe To Tickets I Post Actions</td>
<td>Yes</td>
</tr>
<tr>
<td>Do Not Subscribe To tickets When CC'd On Email</td>
<td>No</td>
</tr>
<tr>
<td>Applause</td>
<td>Yes</td>
</tr>
<tr>
<td>Assignment</td>
<td>Yes</td>
</tr>
<tr>
<td>Ticket Modification</td>
<td>Yes</td>
</tr>
<tr>
<td>SLA</td>
<td>Yes</td>
</tr>
<tr>
<td>Tasks</td>
<td>Yes</td>
</tr>
<tr>
<td>Reminders</td>
<td>Yes</td>
</tr>
</tbody>
</table>

- **Email Ticket**: If this is set to NO, you should not receive any emails from your account. In order for the remaining options in this section to work, this needs to be YES.

- **Assigned Group**: Note: The word “Assigned” in this setting refers to the TeamSupport User/ticket owner. Typically, this is set to NO in order to reduce emails.
  - If set to YES, you will receive emails from tickets that are within your group(s) when the ticket has an owner.
  - If set to NO, you will not receive emails from tickets that are within your group(s) including SLA email notifications when the ticket has an owner.
  
  Click [here](#) to learn more about Groups.

- **Unassigned Group**: Note: The word “Unassigned” in this setting refers to the TeamSupport User/ticket owner. Typically this is set to YES so that the group gets emails about tickets within their group(s) with no owner.
  - If set to YES, you will receive group emails ONLY if the ticket has no owner.
  - If set to NO, you will not receive group emails from tickets that are within your group(s) including SLA email notifications when the ticket has no owner.
  
  Click [here](#) to learn more about Groups.

- **Disable group ticket emails during business hours**: Based on your settings under Admin->My Company->General, if YES, you will not receive group emails during your defined business hours.

- **Subscribe to tickets I create**: When you create a ticket and assign it to someone else, this option will auto subscribe you to that ticket and email you updates. Click [here](#) to learn more about Subscribing.
• **Subscribe to tickets where I post an action:** If you log an action on a ticket, you will be subscribed and receive email updates. Click [here](#) to learn more about Subscribing.

• **Do Not Subscribe To tickets When CC’d On Email:** If YES, when you email a ticket into TeamSupport, you will not be subscribed automatically. If NO, when you email a ticket into TeamSupport, you will be subscribed automatically. Click [here](#) to learn more about Subscribing.

• **Applause:** If Yes, you will receive emails when someone applauds your action.

• **Assignment:** If Yes, you will receive emails when someone assigns you to a ticket.

• **Ticket Modification:** If Yes, you will receive emails when someone modifies a ticket to which you are assigned.

• **SLA:** If No, you will not receive any SLA notifications. If Yes, you will receive emails according to SLA email notification and warning settings for each SLA Trigger, and based on “Assigned Group” and “Unassigned Group” email notifications listed above in this section.

• **Tasks:** If Yes, you will receive all appropriate Task emails.

• **Reminders:** For Support Desk Users, if Yes, you will receive emails when a Reminder is due.

### Rights and Abilities

Click [here](#) for definitions on User Rights.

### Sidebar Menu Display

TeamSupport lets you restrict what sections of the application each user has access to. This can be done for security reasons (ie you don’t want all of the users to see the customer section) or simply to make the user interface have fewer options for agents who just need to log tickets. In either case, restricting what a user can see is controlled by the “User Menu Items” section of the Users page (pictured below).

Simply uncheck the menu items that you want the user to NOT have access to and the next time they log in or refresh the browser, these sections will no longer be visible.
Sidebar Menu Display

- Dashboard
- Admin
- Water Cooler
- Search
- Tasks
- Users
- Groups
- Customers
- Products
- Inventory
- Reports
- My Tickets
- All Tickets
- Support
- Sales
- Issue
- Onboarding
- Software
- Feature Request
- Defects
- Projects
- RMA
- Change Request
- Community Discussion
- KB Article
- Ticket Tags

- Customer Chat
- Knowledge Base
- Community
- Wiki
User Signature

TeamSupport allows each member of your team to add a custom signature to their profile, so that each ticket action/email they add to a ticket will include their signature.

To set this up, go to the Users section and select yourself (or another user if you are an admin). Click on “Edit” under signature in the top section. The following window will appear.

To insert an image to your signature, click the button in the screenshot below. This will bring up the Image Manager where you can upload/insert your image. Don’t forget to click Save!
When you add an action to a ticket, your signature will appear after you click save. The email that goes out will also include your signature.

I spoke with the customer on the phone. He is all set and is happy now!
User Rights and Abilities

Each user can be configured to have specific rights and abilities in your system. The User section is found on the left hand navigation menu.

Rights

A user must be a System Administrator in order to edit the following fields.

<table>
<thead>
<tr>
<th>Rights</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Lines Rights</td>
<td>Only specific product lines</td>
</tr>
<tr>
<td>Ticket Rights</td>
<td>All tickets</td>
</tr>
<tr>
<td>Restrict User From Public Actions</td>
<td>No</td>
</tr>
<tr>
<td>Restrict User From Editing Any Actions</td>
<td>Yes</td>
</tr>
<tr>
<td>Restrict User From Modifying Email Alias</td>
<td>No</td>
</tr>
<tr>
<td>Restrict User From Exporting Data</td>
<td>No</td>
</tr>
</tbody>
</table>

- **Product Lines (Enterprise Only):** This option can allow you to limit the users view to “Only specific Product Lines”. If this option is selected, you will be able to choose multiple Product Lines to associate to the user. Users will then only have visibility to the selected Product Lines and tickets with no Product association.

- **Ticket Rights:** This option is only available to System Admins. Please note that in all cases, Users will always be able to see tickets that have been marked as Knowledgebase articles. Selecting from “Ticket Rights” will give you the following options:
  - **All Tickets:** User can see all Tickets in the system.
  - **Only assigned Tickets:** User can see only tickets that are assigned to them. Click here to learn more about managing tickets.
  - **Only assigned and user's groups:** User can see only tickets that are assigned to them and are assigned in their Group and tickets that are not assigned to a Group (Group = Unassigned). Users with this setting can also see any ticket that is assigned to the Knowledgebase regardless of group. Click here to learn more about Groups.
  - **Only assigned and tickets associated with specific customers:** This will restrict the user to only see tickets that are specifically assigned to them, or that are associated with customers that this user has authorization to see. When you select this rights level, you will see a new box open below called “User Customers” – Add individual customers in this section that the user has the ability to see tickets related to. This option is good for Re-sellers.

- **Restrict User From Public Actions:** This setting does not apply to users who are System Administrators. The default is “No”. If set to “Yes”, the user is restricted from creating a public action.
and from changing a private action to a public action on existing tickets. In order to remove the ability for a user to create public actions on new tickets, the setting “Visible to Customers in initially enabled for new actions”, which is a global setting, must also be set to “False” so that all newly created tickets will be initially private. Typically, when a user is restricted from making public actions, they are also restricted from changing ticket visibility. This option is controlled above with the “Can Change Ticket Visibility” setting.

- **Restrict User From Editing Any Actions:** Allows/Disallows non-admin user from editing any actions, including the ones they have created. This might be necessary if you are concerned about change management for your users. The default is “No”.
- **Restrict User From Modifying Email Alias:** Allows/Disallows user from managing their Email Alias fields, which can be found in User Information.
- **Restrict User From Exporting Data:** Gives users the right to export data from the Reporting module. Click here to learn more about Reporting.
### Abilities

<table>
<thead>
<tr>
<th>Abilities</th>
<th>Yes/No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Actions - Pin</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Actions - Edit Any</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Assets - Create</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Assets - Edit</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Community - Change Visibility</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Companies - Create</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Companies - Edit</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Contacts - Create</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Contacts - Edit</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Contacts - Merge</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Knowledgebase - Change Visibility</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Products - Create</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Products - Edit</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Tickets - Bulk Merge</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Ticket - Change Visibility</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Versions - Create</strong></td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Versions - Edit</strong></td>
<td>Yes</td>
</tr>
</tbody>
</table>

- **Actions-Pin**: Allows a user to be able to pin an action to the top of a ticket.
- **Actions-Edit Any**: Allows/Disallows non-admin users from editing other user’s actions. The default is “No”.
- **Assets-Create/Edit**: Gives users the right to create and edit Assets. Click [here](#) to learn more about Inventory Assets.
- **Community-Change Visibility**: Gives users the right to change the visibility of a Community post.
Click [here](#) to learn more about Community.

- **Companies/Contact-Create/Edit**: Can Create and Edit Companies and Contacts:* Gives users the rights to create and Edit Companies and Contacts. Click [here](#) to learn more about Customers.
- **Contacts-Merge**: Default is 'No'. Gives users the right to [merge contacts](#).
- **Knowledge Base-Change Visibility**: Gives users the right to change the visibility of a Knowledge Base article. Click [here](#) to learn more about Knowledge Base.
- **Products/ Versions-Create/Edit**: Gives users the right to create and edit Products. Click [here](#) to learn more about Products.
- **Tickets-Change Visibility**: Gives users the right to change the visibility of a Ticket. Click [here](#) to learn more about Ticket visibility.
- **Tickets-Bulk Merge**: Allows/Disallows users the ability to access the “Bulk Merge” feature from the Ticket Grid.
Changing Your Password

Change Your Password
1. Go to the Users section and click on our name. You can also reset another user’s password also.
2. Browse to the “User Properties” section.
3. Click “Reset and Email Password” next to “Password:"

Password: [Input field] Reset and Email Password

A user can also reset their own password from their main app TeamSupport log in screen.
Groups

Groups are used to categorize your users. Each user can be assigned to a group which may be used to determine a user's function within the company. Examples would be “Customer Service”, “Software Development”, Quality Assurance”, etc. Users can also be members of multiple groups – which is perfect for those wearing multiple hats!

Groups play a role in several areas of TeamSupport including:

- **Ticket Notifications**: When a ticket is created and assigned to a group, by default every member of the group is notified via email. Any individual who is part of a group may take ownership of a ticket at anytime.
- **User Settings**: Group Ticket emails can be turned off on a per user bases using the “Receive Assigned Group Notifications” and “Receive Unassigned Group Notifications” in User Properties.
- **SLA**: If a Service Level Agreement is applied to a ticket, Group Notifications may be activated.
- **Calendar**: The Calendar feature allows you to indicate a Group assignment. Each Group contains a Calendar tab which allows you to see only events related to that particular Group.
- **Watercooler**: Each post to the Watercooler has a Group option which allows you to only send notifications to specified group(s) rather than all users.
- **Tasks**: Edition: Enterprise Only. The Tasks feature allows you to indicate a Group assignment.
- **Default Group**: You may indicate a default Group that will be applied for new tickets from email and Customer Hub. For manually entered tickets (agent entry), if a user is a member of only one Group, that Group will be the default. If a user is not part of any Group or multiple Groups, the default Group setting will be “unassigned”.
- **My Company Settings**: You may set Company wide Group settings for Group requirements and Group/Ticket display settings.
- **Ticket Automation**: Ticket Automation is a powerful tool that will allow you to customize your account based on your business needs. Groups can be set automatically based on an array of factors including user assignment, keywords, Ticket Type selection, and many other conditions.
- **Alternate Emails**: If more than one email address is being sent into your system for ticket creation, these will be setup as Alternate Emails. Each Alternate Email has a default Group that can be assigned.
- **Reporting and Metrics**: Groups are also a common field to include in reports, especially those added to a Users Dashboard or Ticket View.
- **Product Line**: When you create a Group, you may specify a Product Line. Within the app, the Group will only be available on a ticket when a Product which is in the specified Product Line is selected on the ticket as well. Additionally, the “Product Line Filtering” setting controls whether or not a Group will be displayed when both Group and Customer Hub instance share a Product Line association.
- **Customer Hub**: Groups are (optionally) available for customers to select on tickets created on the Customer Hub. Additionally, the “Product Line Filtering” setting controls whether or not a Group will be displayed when both Group and Customer Hub instance share a Product Line association.
Below is the view from a ticket showing the assigned group.

![Ticket View](image)

Below is a view of the groups window.

![Group Window](image)

- **Name**: This is the name that you gave this Group. The number in parenthesis next to the Group name indicates the number of open tickets in each group.
- **Plus button (Add)**: This button adds a new Group to your account.
- **Pencil button (Edit)**: Click the pencil button to edit the groups basic information.
- **Trash button (Delete)**: You may delete a group by clicking the trash button.
- **Group Information Tab**: This tab contains the users which are members of the group. You may add and remove users from the group from this tab.
• **Open Tab**: Displays the open tickets in the selected group.
• **Closed Tab**: Displays the closed tickets in the selected group.
• **Unassigned Tab**: Displays the open tickets in the selected group which also have an “unassigned” user.
• **All Tickets Tab**: Displays the open tickets in the selected group regardless of open/closed status.
• **History Tab**: Activities in TeamSupport which are related to the selected group will be displayed in the History Tab. This tab is only available to Admins.
• **Watercooler Tab**: If a group was associated to a Watercooler post, the post will show up on the this tab under the appropriate group.
• **Calendar Tab**: If a group was associated to a Calendar event, the event will show up on the this tab under the appropriate group.
Customer Functions – Advanced

This section covers advanced topics in the Customer section. If you are looking for basic tasks, read this section first.

The Customer section in TeamSupport is one of the areas that makes the system unique – Instead of simply tracking tickets, TeamSupport allows you to see a wholistic view of your customers and understand exactly what is going on with them.

Within the Customer section you can search on individual people or their organizations, and see tickets assigned to the Parent Company, Child Company, and individual level. You can also track the products a specific customers has (in the Enterprise version of TeamSupport), attach files, add activities, and alerts so that critical information about your customers is centralized in one location.

Click on “Customers” from the left hand navigation to access the main Customer page.

From here you can:

• Filter: Click All, Customers or Contacts tabs to filter the results. When Customers is selected, you also have the ability to filter by Parent Customer’s only. When using any of the tabs, you have the ability to show InActive customers or contacts in the results by checking the box.
• Search: To search, select the All, Customers, or the Contacts tab. As you begin typing any data that is on a Customer or Contact record, the list will narrow down the results and highlight the reason of why the results have been returned. Click on the record and it will open in a new tab.
• **Add a New Customer**: Click the “New Customer” button to add a new Customer or Contact.
• Recently Viewed Customers: The box on the right hand side of the window gives you easy access to recently viewed Customers and Contacts.
• **Manage a Customer or Contact**: Click on the name of any Customer or Contact and it will open in a new tab.
• Hide Inactive: Hide the customers or contacts that have been marked as inactive. This selection is on a per user basis and will persist the next time you log in.

**Related Topics**

• Click [here](#) for information on importing customers.
• Click [here](#) to learn about the default customer named _Unknown Company._
• Click [here](#) to learn about the benefit of grouping your companies into Company Families.
• Click [here](#) to learn about filtering Knowledge Base content to your Customers by adding them to Knowledge Base articles.
**Unknown Company – What is it?**

The _Unknown Company is automatically created when one of your customers submits a ticket and they do not exist in your customer database.

The _Unknown Company used in conjunction with the Customer Hub is mainly used (and designed) for TeamSupport customers that are supporting customers not apart of a business (Business to Consumer situation).

If the submission comes from email, we will try to parse the email header and identify their first name, last name and email address but in some cases it may seem to be incorrect. This is because the contact did not setup their information correctly in their email client. You do have the ability to make changes to the contact record and also put them into the company they belong to if you like.

By Default, the _Unknown Company’s Hub Access is set to False. Also, as contacts are placed into this company, their portal access is also False. Make sure you set portal access to True for both the company and any contact you’d like to have access.

Once you have given the _Unknown Company portal access, you can provide each contact within the company portal access.

---

**IMPORTANT** – If you are not using the Auto Registration feature which allows your customers to grant themselves access to your Customer Hub, when you manually provide access to a contact in the _Unknown Company, you do not need to send them a password. If a contact is in the _Unknown Company and has portal access, there is no password required.

---

When your customers visit your Customer Hub site, all they have to do is enter their email address and they will be logged in. If they find they do not have access, there is a link on the Customer Hub login page to request access. This will direct your customer to the ticket submission form where they can submit a ticket to your team. From there, you can grant them portal access and respond to them with a visible action on the ticket.

You can read more [here](#) about the ways your customers can access the Customer Hub.
Manage a Customer or Contact

To manage a customer or contact, click on the name from the Customer section on the left hand navigation.

Let's look at each section separately.

**Navigation Tabs**

Information will vary depending on if you have a Customer or Contact selected:

- **Overview/Details:** Displays charts, Custom fields, Sentiment, Contact Details, Ticket History, and Account History for the Customer/Contact. Information, like bio, avatar, and LinkedIn profile can be automatically posted using our Customer Insights feature. From this screen you may also reset a Contact's password for the Customer Hub.

- **Contacts:** Displays all of the Contacts associated with the selected Company. Click [here](#) to learn how to add a Contact to a Company.
- **Tickets**: Displays all of the tickets associated with the Company or Contact. The tickets are separated by the following tabs: All My Tickets, All Open Tickets, All Closed Tickets, All Unassigned Tickets, All Tickets. The behavior of this grid is similar to that of the My Tickets section.

- **Activities**: If you learn intel, or engage with your Customers in any way outside of a ticket, these interactions can be added as Activities. Activities organize non-ticket related information that the whole team can use to understand and build the Customer relationship including phone calls, site visits, new employees, etc.
• **Files**: Here you can attach any number of Files. For example, you may want to attach sales order documents, or system diagrams. The maximum file attachment size is 25MB per file. If you utilize **Product Lines**, you may identify which Product Line is applicable per file. The number next to Files in parenthesis will indicate how many files are attached to the selected Customer.

• **Products**: This section allows you to view and add Customer Product associations. Click [here](#) to learn more about the Product section.

• **Inventory**: This section allows you to view and add Customer Inventory assignments. Click [here](#) to learn more about the Inventory section.
- **Watercooler**: This section allows you to view and share Water Cooler posts that have been associated with the selected Customer. Click [here](#) to learn more about the Water Cooler.

- **Ratings**: This section allows you to view ratings that were left by your Customers. Click [here](#) to learn more about Ratings.
• **Calendar:** This section allows you to view Events that are associated with your Customers. Click [here](#) to learn more about Calendar.

![Calendar Section]

April 1 2015

- **SLA:** If you are using SLA’s for your Customer, SLA assignments and History will be displayed on this page.
Tasks: Edition: Enterprise Tasks allows users to assign and manage Tasks for themselves and/or other users.

Additionally, you will find the following buttons:

- **Edit**: Click the Edit button to toggle into edit mode for the Details/Overview screen.
- **Refresh**: Refreshes the current view
- **Merge**: Click to Merge a Customer or Contact. This feature is only available to System Administrators.
- **Subscribe/Unsubscribe**: Allows you to Subscribe to a Customer.
- **Reminder**: Allows you to set a Reminder for a Customer.
- **Trash**: Allows you to delete a Customer. This feature is only available to System Administrators.
The middle section contains the following information:

- **Ticket Pie charts**: Indicating Open and Closed Tickets broken down by Group assignment. You can hover over each segment to see more detail.
- **Customer Distress Index (CDI)**: A gauge used to determine the distress level of your customers.
- **Custom Fields**: Allows you to view the Custom Fields created for the Customer. You may edit these custom fields by clicking on the Edit button in the upper right.
- **History**: The Customer history will display every action for a given Customer. The Date, person who performed the action (Author), and Description will be given for each action.
## Right Hand Section of Main Details/Overview

### Recent Ticket History

<table>
<thead>
<tr>
<th>Ticket</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>323</td>
<td>Submitted by consultant</td>
</tr>
<tr>
<td>319</td>
<td>Portal Access Request</td>
</tr>
<tr>
<td>315</td>
<td>Webshop not functioning</td>
</tr>
<tr>
<td>295</td>
<td>SOF #44843 - Upgrade to v2</td>
</tr>
<tr>
<td>290</td>
<td>Conversion</td>
</tr>
</tbody>
</table>

### Open Tickets: 11

### Company Info

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Acme</td>
</tr>
<tr>
<td>Primary Contact</td>
<td>Steve Miller</td>
</tr>
<tr>
<td>Description</td>
<td>Empty</td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.acme.com">www.acme.com</a></td>
</tr>
<tr>
<td>Phone</td>
<td>1234567890</td>
</tr>
<tr>
<td>Address</td>
<td>123 street city, state 78213 USA</td>
</tr>
</tbody>
</table>
### Settings

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization ID</td>
<td>454149</td>
</tr>
<tr>
<td>Default Support User</td>
<td>Empty</td>
</tr>
<tr>
<td>Default Support Group</td>
<td>Empty</td>
</tr>
<tr>
<td>Domains</td>
<td>Empty</td>
</tr>
<tr>
<td>Portal Access</td>
<td>true</td>
</tr>
<tr>
<td>Service Agreement</td>
<td>[None]</td>
</tr>
<tr>
<td>Service Level Agreement Expiration Date</td>
<td>DB (Clone)</td>
</tr>
<tr>
<td>Support Hours Per Month</td>
<td>0</td>
</tr>
<tr>
<td>Active</td>
<td>true</td>
</tr>
<tr>
<td>API Token</td>
<td>dec5fc20-5e51-4b64-aba3-4a18b2125c88</td>
</tr>
<tr>
<td>API Enabled</td>
<td>false</td>
</tr>
<tr>
<td>Inactive Reason</td>
<td>Empty</td>
</tr>
<tr>
<td>Send Ticket Actions</td>
<td>true</td>
</tr>
</tbody>
</table>

The right hand section contains the following information depending on whether you have a Customer or Contact selected.

- **Recent Ticket History**: The five most recent tickets. Click on the ticket and it will open in a new tab.
- **Company Info/Contact Info**: Displays standard fields for the Customer or Contact. Click [here](#) to learn how to edit these fields.
- **Settings**: Displays standard settings for the Customer or Contacts. Click [here](#) to learn how to edit these fields.
Edit Customer Info and Settings

To manage the Customer Information section, click on a Customer or Contact name from the Customer section on the left hand navigation. Click the Edit button on the top right hand corner of the window. The button goes from blue to green, which means you are in edit mode. The fields which are editable in the Company/Contact Info section will become blue.

You may also reset a Contacts Customer Hub password by clicking on the “Send Password” button.
**Company/Contact Info**

**Company Info**

<table>
<thead>
<tr>
<th>Name</th>
<th>Cars, Inc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact</td>
<td>McQueen, Lightning</td>
</tr>
<tr>
<td>Description</td>
<td>Movie Software for kids</td>
</tr>
<tr>
<td>Website</td>
<td><a href="http://www.cars.com">www.cars.com</a></td>
</tr>
<tr>
<td>Entity ID</td>
<td>Empty</td>
</tr>
</tbody>
</table>

**Add Parent Company**

<table>
<thead>
<tr>
<th>Other</th>
<th>+13126015000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>300 S. Riverside Plaza Suite 1000 Chicago, IL 60606 United States</td>
</tr>
</tbody>
</table>
Contact Info

Name: Sam Halloway  
Email: sam@aplus.com  
Title: President  
Company: A Plus Productions  
LinkedIn: Empty  
Email 2: shallowway@aplus.com  
Mobile: 465-233-5599  
Home Office: 8822 Greenville  
Suite 500  
Ft. Worth, TX  
76252  
USA

Here are the available fields depending on whether you have a Company or Contact selected. Please note that our Customer Insights feature will automatically populate a company logo and description if you include a website on the company record. Customer Insights can be disabled [here](#).

- **Add Email**: Click the +Email button to add a secondary email address to a contact. If the contact emails your support address with any of their listed email address, TeamSupport will associate the ticket to the contact.
- **Add Phone/Add Address**: Click the +Phone or +Address buttons to add this information for the Customer.
- **Icon**: The Company icon comes from our Customer Insights feature. Click [here](#) to learn more.
- **Name**: Name of the Company or Contact.
- **Primary Contact**: The primary contact for this customer. A pick list will appear for you to choose from all of the Contacts associated with the Company.
- **Description**: A brief description of the Customer.
- **Website**: The Customer’s website. If you populate this field, our Customer Insights feature will pull information back from the internet and populate the description and company logo fields.
- **EntityID**: When populated, this field will allow a contact or user to pass the customer’s EntityID as a parameter via the subject line of an email, which causes the customer to be identified as the primary customer on the ticket.
- **Parent Company**: You may group your customers in a hierarchical fashion by indicating Parent Companies. Click [here](#) to learn more about Customer Families.
- **Existing Phone and Addresses**: Any phone and addresses that have already been added to the Customer.
- **Email**: The email associated with the Contact.
• **Title:** The business title for this Contact.
• **Company:** The organization that this Contact is associated with.
• **LinkedIn:** You may provide the URL to the contact’s LinkedIn account. If provided, our Customer Insights feature will automatically supply the contact’s image from LinkedIn.

## Settings

### Company:

<table>
<thead>
<tr>
<th>Settings</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization ID</td>
<td>454149</td>
</tr>
<tr>
<td>Default Support User</td>
<td>Empty</td>
</tr>
<tr>
<td>Default Support Group</td>
<td>Empty</td>
</tr>
<tr>
<td>Domains</td>
<td>Empty</td>
</tr>
<tr>
<td>Portal Access</td>
<td>true</td>
</tr>
<tr>
<td>Service Agreement Expiration Date</td>
<td>[None]</td>
</tr>
<tr>
<td>Service Level Agreement</td>
<td>DB (Clone)</td>
</tr>
<tr>
<td>Support Hours Per Month</td>
<td>0</td>
</tr>
<tr>
<td>API Enabled</td>
<td>false</td>
</tr>
<tr>
<td>Inactive Reason</td>
<td>Empty</td>
</tr>
<tr>
<td>Send Ticket Actions</td>
<td>true</td>
</tr>
</tbody>
</table>

• **Organization ID:** A unique System ID for each Company.
• **Default Support User and Group:** You can select a User or Group to be automatically assigned to any ticket that is created by a Company.
• **Domains:** You may list the Company domain(s). Multiple domains can be separated by a comma. If a domain is listed, and a ticket is created or if a Chat is initiated with an email which was not already a Contact in the system, it will be associated to the Company based on the a domain match.
• **Portal Access:** Indicates if a Company is given Customer Hub Access.
• **Service Agreement Expiration Date:** You may indicate the date on which the Service Agreement should expire. A Company with an expired Service Agreement will display with a red background on any ticket.
- **Service Level Agreement**: Indicates the selected Service Level Agreement (SLA).
- **Support Hours Per Month**: You may indicate the available Support Hours that a Company is allotted per month.
- **Active**: Indicates whether a Customer is Active or Inactive.
- **API Token/API Enabled**: This field will allow you to give your customer access to their data within your TeamSupport account.
- **Inactive Reason**: You may indicate the reason a Customer has been marked as Inactive.
- **Send Ticket Actions**: When true, the ticket update emails sent to this Contact include the public actions of a ticket. When false, the ticket update emails will not include public actions, but rather a link to your customer hub login, where your customers can see the public comments.

**Contact:**

**Settings**

- **Active**: Yes
- **Portal User**: Yes
- **Portal View Only**: No
- **Prevent email from creating and updating tickets**: Yes
- **Prevent email from creating but allow updating tickets**: Empty
- **Disable Organization Tickets View on Portal**: No
- **Disable Organization Children Tickets View on Portal**: No
- **Last Logged In**: 5/5/2015 8:41 AM

- **Active**: Indicates whether a Contact is Active or Inactive.
- **Portal User**: Indicates if a Contact is given Customer Hub access.
- **Portal View Only**: The default is false. If checked, the contact will have read-only access to the
Customer Hub.

- **Prevent email from creating and updating tickets:** You may set this option if you are getting spam or want to block emails from certain contacts. When set, we will no longer allow emails into your account from this address.

- **Prevent email from creating but allow updating tickets:** You may set this option if you want to prevent emails from creating tickets, but if the ticket is already created, this contact may update tickets. This is useful if you only allow certain individuals (like supervisors) from your customers organizations to submit tickets, but once tickets are submitted, anyone from the company can update.

- **Disable Organizational View:** If you would like to disallow the viewing of Organization wide tickets from the Customer Hub, you can set this option to “No”.

- **Disable Organization Children Tickets View on Portal:** With our Customer Families feature, by default, a contact within a Parent Company can view tickets of all Child Companies. Set this option if you would like to disable the ability to view tickets of child companies.

- **Last Logged In:** Displays the timestamp of the last system login.
Customer Insights

TeamSupports offers our Customer Insights feature which automatically pulls data from publicly accessible data sources including a Contact's photo and LinkedIn profile, and the Company Logo and Description.

The Contact avatar will be displayed along with any action that is created by the Contact on a Ticket. Additionally, these avatars may be included in outgoing emails.

Company

Simply type in the company's website into the “Website” field, and the system will discover the Company Logo and Description. If you have already included a Company Description, Customer Insights will not overwrite this field.

Contact

Simply type in the contact's email address into the primary email field, and the system will discover the Contact Photo and LinkedIn profile. If you have already included a Linkedin Profile, Customer Insights will not overwrite this field.
Setup

This feature can be disabled in My Company Settings. It may take up to 24 hours for this information to be pulled into TeamSupport. The service is “once and done”, so continual updates are not made.
Customer Families

Customer Families allows you to relate a number of customers together, similar to a parent/child methodology. This means you’ll be able to look at one parent company and access all of the tickets from the various companies connected to it quickly and easily. This is very helpful in situations where your customers have multiple locations, or multiple divisions. This also applies to the Customer Hub. When a customer is associated with a parent company and they log into the Hub, they’ll be able to see all of the information for the various subsidiaries as well.

Using Customer Families

To see your list of Parent Companies, browse to Companies from your left hand navigation, and click on the Parent Companies tab.

Here is an example of a Parent Company.

![Parent Company Example](image_url)

You will notice that it looks very similar to a regular Company with a few important distinctions:

- **(Parent View)**: The word “Parent View” is noted next to the company name in parenthesis.
- **Parent View/Child View Toggle button**: To switch back and forth between Parent View and Child View, click the Parent View/Child View Toggle button in the upper right hand corner.
- **Pie Charts and CDI**: These graphs will display data for both Parent and Child Companies. The CDI is an average of Parent and Child companies.
- **Children Tab**: Lists all of the Companies are defined as Children Companies to this Company.
- **Contacts Tab**: The Contacts tab will show contacts for both Parent and Child Companies.
- **Tickets Tab**: The Tickets tab will show tickets for both Parent and Child Companies.
• **Activities:** The Activities tab will show activities for both Parent and Child Companies.
• **Files:** The Files tab will show files that have been attached to both Parent and Child Companies.

There are some features that are not available in Parent Company view such as [Calendar](#), [Water Cooler](#), [Customer Merge](#), [Subscribe](#), [Reminders](#), [Delete](#), and [Ratings](#).

**Creating a Parent/Child Relationship**

Please note that a Parent Company is not created directly. Initially, it will be just a regular Company. It becomes a Parent when you make the Parent/Child relationship. Once the relationship is made, the Company will be visible in both the Company and Parent Company tabs in the Customer section, and you will be able to toggle between Parent/Child view as described above.

To create a Parent/Child relationship, visit the record for the Company you wish to make the child and define a Parent Company. If it is not already, the Parent company will be displayed in the “Parent Companies” section, and the Child will be displayed in the “Child Companies” tab of the Parent Company.

![Monsters Inc - Corporate](#)

**Managing a Parent Company**

The Edit button is not available in Parent View. To edit a Parent Company, you simply need to edit the company in Child View. You can toggle views by clicking the Parent View/Child View toggle button on the upper right hand corner as seen in the screenshot above.

**Marking a Parent Company Inactive**

While in Child view edit mode, a Parent Company can be marked inactive. The following prompt will be displayed on the screen which allows the user to select whether or not the Child Companies should also be set to inactive along with the Parent Company.
Manging a Contact within a Parent Company

You have an option for contacts of Parent Companies which will allow/disallow them from seeing tickets for Child companies. Click here to learn more about this contact setting.

Additional important Notes about Customer Families

• A Parent may have many Child Companies, and a Child Company may have many Parent Companies.
• Any Company can be a Parent Company.
• When a Company is a Parent Company, it will be listed as a Parent Company and a regular Company. You can switch between Parent View and Child (or Regular) View as described above.
• You may assign Contacts to Parent Companies. Contacts that are assigned to Parent Companies may have ticket visibility of all Child Companies. This is a contact setting which can be defined here.
Customer Distress Index (CDI)

One of the powers of TeamSupport is that we track a great deal of information about your customers.

The Customer Distress Index, or CDI for short, computes a single number for each of your customers which will give you an idea of how often your customers are interacting with your support department and how quickly their issues are being resolved. This can be an important metric to understand how much difficulty your customers are having with your product or service.

The CDI data is displayed in the Customer section via a gauge indicator, and is configured in your Admin panel. A higher CDI number indicates a higher potential for distress.

There is also a CDI Trend which indicates which way your CDI calculation is moving, up or down. There are multiple weights involved in calculating the CDI.

Click here to learn more about CDI and how it is configured.
Customer Activities

If you learn intel, or engage with your Customers in any way outside of a ticket, these interactions can be added as Activities. Activities organize non-ticket related information that the whole team can use to understand and build the Customer relationship.

Activities allow your team to own the customer relationship post sale. While tickets capture “transactional” activities that typically happen via email, the Activities section can serve as a repository for other non-transactional activities that happen outside of tickets. Leveraging this information will allow for greater continuity in support for your Customer because everyone on your team has awareness of conversations that are shared between all users.

Because Activities allow for visibility from both Contact and Customer levels from within the same view, these Customer relationships can be build without leaving TeamSupport.

Each Company and Contact has an Activities tab in the Customer section. Activities can be used to describe any type of activity that you have with your Customers. Some ideas are phone calls, site visits, notes about new employees, and important information about the customer that your users should be Alerted about.

A few notes about Activities:

- **Number of Activities:** The number on the tab Activities tab in parenthesis indicates how many Activities are present on the selected Customer.
• **No Limits:** There is not a limit to the number of Activities that are added.
• **Company and Contact Activities:** The Company Activities as well as the Contact Activities are displayed in both the Company and Contact levels for increased visibility and awareness.
• **Recent Activities:** The 5 most recent Activities for a Customer or Contact are displayed on the business card on the Ticket Page.
• **Posting to the Water Cooler:** TeamSupport’s Water Cooler feature allows you to collaborate more closely with your company to better support your customers. You may associate a Water Cooler post to a Customer Activity in order to notify others on your team.

### Add an Activity

There are two ways to add an Activity: manually and from email. Both options are described in this section below.

#### Manually Adding an Activity

Click the Log Activity Button. The following form is displayed.
Field Definitions

- **Title**: Title is the only required field. This field will be displayed in the Activities list.
- **Description**: You may add details to your Activity in the Description field. The Description is used when displaying an [Alert](#).
- **Activity Type**: Activity Types help to define a more accurate log of every interaction. There are 4 basic types which are in the list by default (Call, Email, Note, and Visit). Additionally, you may add/edit custom types in the [Admin section](#).
- **Date Activity Occurred**: The current date will be the default. However, you may change the date accordingly, for example, if the Activity happened in the past.
- **Product Line**: Product Lines can be defined for each Activity to provide additional context. Additionally, if you select a Product Line for your Activity, only users who have rights to the Product Line will be able to see Activity.
- **File**: Files associated with each Activity (such as a presentation or spreadsheet) can be uploaded and attached for convenience. The maximum file size is 25MB per file.
- **Set as Alert**: Customer Alerts allow you to change Activities for Customers and Contacts into an Alert that will pop up on the users screen when viewing a Ticket they are associated with. The pop up will also occur when the user views the Customer or Contact from the Customers section.
- **Save Activity/Cancel Buttons**: You must press the Save button in order to save your Activity.

Creating an Activity from Email

Because interactions with your customers so commonly happen inside of email, it is important to have an easy way to turn those emails into Activities inside of your TeamSupport account. For this reason, Activities can be created by bcc'ing your emails into your TeamSupport account.

**How it Works**

Your TeamSupport account has a unique Activity email address. Any customer correspondence can be bcc’d to that email address and an Activity will be created and associated to the Contact that is listed in the address line of the email.

Your Activity email address can be found in the Customer section:
It can also be found next to the Log Activity button on the Contact Activity page.

When created by email, the Activity will have the following fields:

- **Title**: The subject of the email
- **Description**: The body of the email. Html and embedded images are preserved
- **Activity Type**: The Activity Type field will be listed as “Email”
- **Date Activity Occurred**: Date when the activity is created
- **Existing Files**: The email attachments will be included in the Activity

**Additional Notes about creating an Activity from email**

- The email in the FROM line must be a valid, active TeamSupport User and must belong to the account to which the Activity email belongs. For example, if the Activity email belongs to Company ABC, the email in the FROM line must be a valid, active TeamSupport User in the Company ABC account.
- The TO, and CC can have any email address, however only the valid contacts will have the activity created for them and no contact will be created.
- The Activity email must be added to the BCC, and only in BCC, for the email to generate the activity for the contact(s)
- If an email contains a Primary or Alternate System email address in the TO or CC lines, and also has the Activity email in the BCC line, a ticket will be created/updated as normal and also the Activity(ies) for the Contact(s) will be created.
Creating a Task from an Activity

Tasks are an Enterprise Edition feature

An important conversation or interaction with your Customer is a common use case for an Activity. Those interactions typically involve one or more Tasks in order to follow up with the interaction. You can save some time by adding and associating a Task directly from the Activity by clicking on the + (plus) button on the Activities grid.

This opens a New Task window and automatically associates the Activity to the Task.

After adding all other necessary information, the Activity association will display as a link on the Task which will open the Activity in a new tab. Click here to learn more about the other fields in the Task window.
Customer Alert Messages

Customer Alerts allow you to change Activities for Customers and Contacts into an Alert that will pop up on the users screen when viewing a Ticket they are associated with. The pop up will also occur when the user views the Customer or Contact from the Customers section.

To add an Alert, go to the Activity tab for a Company or Contact. When adding the Activity, check the box labeled “Set As Alert” as seen below. The “Description” field will be displayed in the alert box.

When the message pops up, there are three options.

1. Close will close the Alert box, but the next time you view a Ticket with the Company/Contact, it will appear again.
2. Snooze will close the alert for 8 hours, after that time, the Alert will appear again on the Ticket.
3. Dismiss will stop the Alert from reappearing.
You have the ability to set multiple Activities as “Alerts”. In the case of multiple Alerts, they will each display in separate pop ups in the order in which they were created (oldest first).

You have the option to disallow a non-Admin from dismissing an Alert. This setting can be found in Admin->My Company “Hide Alert Dismiss for Non Admins”
Subscribe to a Customer

You can subscribe to a customer to get updates!

A key feature in TeamSupport is the ability to "subscribe" to a customer. To do this, simply click the Subscribe button next to the customer name on the right. Anytime something changes with the customer, such as a new ticket or a new action to an existing ticket, you will be notified via email which will contain the updated information. This is an invaluable tool for SE’s (sales engineers) and support managers to keep track on key accounts.
Merging Companies and Contacts

There are occasions where you may have multiple entries for the same Company or Contacts. In these cases, you may choose to merge these Companies or Contacts together.

Please note that the Customer Merge feature is only available to system Admins. Also, all merge activity gets logged to the Customer History for auditing/historical reference purposes.

To merge two Companies or Contacts into one, you will first choose the loser. The loser will be deleted and will not have an option of recovery. Data from the losing Company or Contact will never overwrite the winning Customer.

With the losing Company or Contact open in a tab, click the Merge button in the tool bar.

The following window will appear which will allow you to type in the name of the winner Company or Contact, which is the one that will not be deleted.
Merge Companies

1. You have selected the "loser" of the merge
All the contacts, tickets, notes, files, products, assets, watercooler messages, ratings and calendar entries of this company will be moved to the "winner" you choose below. The "loser" will then be deleted.

2. Next choose the Company you want to keep the "winner"
You can only choose one Company. If you'd like to merge more than two companies together just go through the merge process again after the merge you are performing now is done.

Search for the company you want to merge ...

After typing in your entry, details of your entry will appear, along with a box to confirm that the loser of the merge will be permanently deleted.

Assure Technical Services

Here is some basic information about the company you have selected:
**Company Name:** Assure Technical Services  
**Company Website:** null  
**Company Description Sample:** id: 508447 name: Customer

3. Finally, click "OK" to merge these Companies.

- I understand that I will be deleting the losing company, and there is no recovery from that action.

    Cancel    OK
What gets merged

- All tickets of the losing Company or Contact are moved to the winner.
- Phone Numbers, Address, Files, Activities, History, Ratings, Reminders, Products associations, and Inventory associations of the losing Company or Contact are added to the winner record in addition to any of these items that may have already existed on the winner record.
- Custom field data and general settings of the loser Company or Contact are posted to the winner record ONLY if the winners field is empty. The losing record never overwrites any data.

What does not get merged

- Custom field data and general settings of the loser Company or Contact do not come over to overwrite the winners custom field data and general settings.

Click here to learn more about merging Tickets.
Routing Customer Tickets

In some cases it is beneficial to be able to direct a specific customer’s e-mail to a different group and/or individual than the generic support group. TeamSupport allows you to do this by assigning a default support group and/or use to the Customer record. Simply go to the Customer section, and select the Details tab, click “Edit Organization”. You will then be able to select the “Default Support User” or the “Default Support Group” for this customer so that any new tickets created by that customer will be routed to that group or individual.

This feature is commonly used for “high profile” customers that you want handled by a more experienced support group instead of being dealt with by the normal support team.

You can also handle custom routing by creating automation rules as well.
Time and Service Agreement Tracking

TeamSupport allows you to track when a customers warranty expires. You can also define a set number of hours per month your customer has purchased, and also see how much time they have spent/have left over for the month.

Note: these two options do not rely on one another. If you only want to track hours per month and not warranty expiration, that is fine.

You may also track time on each ticket action. Click here to learn more about tracking time on tickets.

To configure these settings open a customer by going to the Customer section from the right hand navigation. Click the “Edit” button on the Customer detail page. Fill in the date for Service Agreement Expiration, then fill in the number of hours on Support Hours Per Month and click “Edit” again to leave Edit mode.

Settings

<table>
<thead>
<tr>
<th>Organization ID</th>
<th>1107</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Support User</td>
<td>Empty</td>
</tr>
<tr>
<td>Default Support Group</td>
<td>Empty</td>
</tr>
<tr>
<td>Domains</td>
<td>aplusproductions.com</td>
</tr>
<tr>
<td>Portal Access</td>
<td>true</td>
</tr>
<tr>
<td>Service Agreement Expiration Date</td>
<td>9/05/2015</td>
</tr>
<tr>
<td>Service Level Agreement</td>
<td>Gold</td>
</tr>
<tr>
<td>Support Hours Per Month</td>
<td>15</td>
</tr>
</tbody>
</table>

In this example, we have added an action on a ticket and put in 30 minutes for time spent.
Next, hover over the customer name on the right hand side of the ticket, and the following pop-up will appear:

As you add time spent on your tickets, we will auto tally the time based on what you setup in the configurations. In the example above, we have indicated this customer has 15 support hours each month, and we’ve used 30 minutes to date.

This will enable you to see right away what the customer has used and what they have remaining.
Reminders for Customers

Edition: Support Desk

Enterprise Edition uses the extended Tasks feature rather than Reminders. The Tasks feature allows TeamSupport users to assign and track multiple tasks for other users or themselves on a single ticket. Click here to learn about Tasks.

To add a reminder to a company and/or contact, go to the Customers section and click the Add Reminder button.

You will be presented with the following form:

Your Customer/Contact reminders will show up along with your ticket reminders in the My Tickets section.
One of the biggest differences between TeamSupport and the rest of the solutions on the market is understanding the importance of being able to track specific product versions to a customer and a ticket. The development/product management team can define every product and version within the Products section. By defining this information, you will have quick access to these versions from the pull down menu.

The Products Section on the left hand navigation lets you easily see what tickets are associated with each product, version, and customer, and where you define all of your Product Lines, Products, and Versions. As you can see, the design of TeamSupport makes it very easy to tell what Product Lines, Products and Versions you provide.

Organizing the data in this fashion will not only save everyone time, but also consolidate information needed to provide outstanding customer service!

Managing Product Lines

Click on the Product Lines header under the Products section.
Product Lines are tied to the following areas of TeamSupport:

- **Multiple Customer Hubs**: You have the ability to create an unlimited number of Customer Hubs based on your Product Lines. Configuring Multiple Hubs along Product Lines will give your Customers a further refined self-help tool.

- **Email Templates**: Creating customized Email Templates is a powerful option which can allow you to specify different logos on email responses based on the Product Line (by way of Product) that is selected on a ticket. When you select a product on a ticket, the appropriate email template will be used based on your configurations.

- **Ticket Types**: Ticket Types may be filtered based on the Product selection within the TeamSupport app, and on the Customer Hub. This is useful if you would like to display specific Ticket Types based on the Product that is selected on a ticket.

- **User Rights**: User Rights are a key component of Product Lines. You may want certain users to only have access to tickets that are of a certain Product Line. Setting Product Line User Rights for a user will limit ticket access site wide to only those tickets that have a matching Product Line (by way of Product) OR have no Product association.

- **Custom Fields**: Custom Fields on Tickets are very useful, and can also be applied to Product Lines. Custom Fields for Product Lines will be displayed on the main page of the Product Line and are fully reportable. Some Custom Field Categories (like in the Customer table) can also be created against a Product Line.

- **Action Types**: You can specify a list of Action Types that a user can select from when creating an action from within TeamSupport. A use case for this might be to specify that a user spent time on billable vs non-billable work, or to document a phone call. Action types can also be linked to Product
Lines.

- **Tasks:** Edition: Enterprise Only. The Tasks feature allows you to indicate a Product assignment.
- **Ratings:** TeamSupport can present your customers with an option to leave a rating for their support experience on each ticket. You have the option to filter the ratings based on the Product Line that is associated to the ticket.
- **Customer Files:** You may attach any number of files to your Customer records. When attaching, you may also indicate the Product Line that is associated to the file. This will allow you to upload multiple files on a Customer record that are Product Line specific.
- **Reports:** Product Lines are available to report against in our Reporting module.
- **Groups:** Groups may be associated to a Product Line. This allows them to be filtered based on the Product selection within the TeamSupport app, and on the Customer Hub.
- **Customer Activities:** If you learn intel, or engage with your Customers in any way outside of a ticket, these interactions can be added as Activities. Activities organize non-ticket related information that the whole team can use to understand and build the Customer relationship including phone calls, site visits, new employees, etc.

- **Jira:** Jira can be setup as a third party integration to map the Jira Project and TeamSupport Product in the Jira Integration section. The relationship between the TeamSupport Product and/or Product Version to the corresponding Jira Project is made by indicating the Project Name in this section. There is a Project Key field on both the Product level and the Version level. A Jira Instance selection will also be available if you have multiple Jira instances defined.

- **TFS Integration:** Team Foundation Server (TFS) can be setup as a third party integration to map TFS Projects and TeamSupport Products. In the TFS Integration section, you can define TFS Project Names for Products and Versions that will be used for new syncs. The relationship between the TeamSupport Product and/or Product Version to the corresponding TFS Project is made by indicating the Project Name in this section. There is a Project Key field on both the Product level and the Version level.

Select any Product Line and details will be displayed including Ticket history, Custom Fields, and a Product list.
Adding a Product Line

Click [here](#) to learn how to add a Product Line.

Managing Products

- **Details Tab** – Contains important information on the Product or Version including Open Tickets, Recent Ticket History, SLAs, Jira Integration, TFS Integration, and Custom Fields. On this tab you can indicate an Email Reply To Address. This field is a pick list that pulls from your available Alternate Email addresses. These email addresses are defined in Admin->Email -> Alternate Email in the “Sending Email Address” field. When an agent creates a ticket manually and adds a Product to the ticket, the corresponding Email Reply To Address will be used on the outgoing emails for that ticket.
• **Versions Tab** – Version information allows you to update what changes and fixes have been put in place. You can also upload version updates so they may be downloaded by customers on the Customer Hub.

  ![DB Wizard](image)

  **DB Wizard**

  ![Add Version](image)

  **other**
  - Alpha
    - 0 Open Tickets
    - 0 Closed Tickets
  - 3.0
    - Production
    - Released on 8/10/2011
    - 17 Open Tickets
    - 35 Closed Tickets
  - 2.0
    - Production
    - Released on 3/29/2010
    - 5 Open Tickets
    - 5 Closed Tickets

  ![Customer Integration](image)

  **Jira Integration**

  ![Email Reply To Address](image)

  **Email Reply To Address**

• **Customers Tab** – Associating a customer to a product is a powerful feature in TeamSupport. Always know what products and versions your customers have. Making this association is very easy to do. Simply click the product or a version, then click the Associate Customer button. You are presented with the following form:
When making the association, you are presented with the option of setting an expiration date for this individual product. If the product support has expired, the customer can be limited to what they can view and download from the Products section on the Hub. The setting for this can be found under Admin->My Portal->Customer Hub Settings->Login Settings>“Honor Support Expiration”.

The result of this selection can be seen by selecting the customer tab within the Products section – or the Products tab within the Customer section.

- **Tickets Tab** – Easily find tickets that were resolved as a result of a new version. Click [here](#) to learn more about associating products and versions to tickets.

- **Knowledge Base Tab** – Any Knowledge Base articles that have been associated to the Product or Version will be displayed here. You may [filter Knowledge Base articles](#) on the Customer Hub based on the Product selection.

- **Files Tab** – Another great feature in the Products section is that you can attach files to product
versions. This is commonly used to upload the newest version of software so that your customers can
download it from the Customer Hub. When a customer goes to the Hub and clicks on the Products
section, they will have the ability to download the most recent versions of your software. The
“Downloaded Products” report in the Reports section provides tracking of what user downloaded what
versions of your software. The maximum file attachment size is 25MB per file.

- **Water Cooler Tab** – Any Watercooler posts that have been associated to the Product or Version will
  be displayed here.

- **Inventory Tab** – Any Inventory Assets that have been associated to the Product or Version will be
displayed here.

- **Calendar Tab** – Any Calendar Events that have been associated to the Product or Version will be
displayed here.

- **Edit** – Click the Edit button to change from Blue to Green which indicates you are in edit mode. Click
  again to exit edit mode. Please note that the ability to edit Products and Versions depends on user
  rights.
- **Refresh button** – Refreshes the current Product/Version view
- **Delete** – Allows you to permanently delete the Product or Version. Please note that the ability to edit
  Products and Versions depends on user rights.

**Mandatory Fields**

When filling out tickets, you can make it mandatory for an agent to choose a product and/or version. To turn
this on, go to Admin->My Company and edit the following fields which can be found in your Admin section:
“Require Products for Ticket” and “Require Product Version for Ticket”
Adding a Product Line/Product/Version

Edition: Enterprise

Adding New Product Lines

Under Products on the left hand navigation, click Product Lines, then New Product Line. You will be presented with the following screen:

Field Definitions

- **Name**: This is the only required field.
- **Description**: Add an optional description.
- **Custom Fields**: Custom Fields can be created globally for Product Lines.

Adding a New Product

Adding new products is very simple. Just click the “New Product” button and the below form opens.
Field Definitions

- **Name**: This is the only required field.
- **Description**: Add an optional description.
- **Line**: If this Product belongs to a Product Line, you may indicate the Product Line here.
- **Custom Fields**: Custom Fields can be created globally for Products.
- **Jira Product Key**: This field may be displayed if you have the Jira Integration active in your account. This field allows you to map a TeamSupport Product to a Jira Product. Please read the Jira documentation carefully before filling out this field or the mapping may not work correctly.
- **TFS Product Key**: This field may be displayed if you have the TFS Integration active in your account. This field allows you to map a TeamSupport Product to a TFS Team Project. Please read the TFS documentation carefully before filling out this field or the mapping may not work correctly.

Adding a New Version

Adding new products is also very simple. Just browse to the Product that you would like to add the new version to, click on the Versions tab with the Product, and click the “New Version” button.
Field Definitions

- **Version Number**: This is the only required field. Versions sort in descending order. When dealing with numbers, it is best practice to pad with 0’s before and after the decimal in the version # so that it will sort properly. For example, the following versions would be sorted in the following order: 100, 020, 010, 009, 008, 007.45, 007.07
- **Status**: This field is typically Alpha, Beta, Production and Discontinued. Of course, this drop down is customizable and you have the freedom to create your own.
- **Expected Release**: You have the option of indicated the expected release date of the version.
- **Released**: This field will indicate to your internal team if the version has been released. Additionally, if this box is checked, the version along with the description information below will be displayed on the Customer Hub. This is a great way to display your release notes to your customers.
- **Description**: Add an optional description.
- **Custom Fields**: Custom Fields can be created globally for Product Lines.
- **Jira Product Key**: This field may be displayed if you have the Jira Integration active in your account. This field allows you to map a TeamSupport Version to a Jira Product Version. Please read the Jira documentation carefully before filling out this field or the mapping may not work correctly.
- **TFS Product Key**: This field may be displayed if you have the TFS Integration active in your account. This field allows you to map a TeamSupport Version to a TFS Team Project Version. Please read the TFS documentation carefully before filling out this field or the mapping may not work correctly.
Inventory Section

Edition: Enterprise

The TeamSupport Inventory module allows you to track physical inventory items (or “assets”) which have been shipped to customers. You can also associate these assets to tickets for easier tracking.

There are four tabs on the main screen of the Inventory module:

• **All** – Shows all assets available across the Assigned, Warehouse, and Junkyard tabs.

• **Assigned** – Shows all assets which are currently assigned to customers.

• **Warehouse** – Shows all unassigned assets; which are the assets that are available to ship.

• **Junkyard** – Shows all assets that are no longer functioning. This allows you to keep track of historical assets.

From the main Inventory screen, you can perform the following tasks:

• **Search**: Type the Asset Name or Serial Number and the list will narrow down
Inventory

- Add a new Asset: Add a new asset by clicking on the “New Asset” button.

- Open/Manage an Asset: Manage an Asset by clicking the name of the asset from the results list or the “Recently Viewed” section. This will open the asset in a new tab. Management tasks include: Ship, Return, Junk, Edit, view Ticket associations, attach files, and view asset info.

Other Inventory functions:

- View and create Reports for Inventory information (including Asset counts in the Stock Inventory Report)
- Change user settings for adding/editing Inventory Assets.
- Associate Inventory to a Ticket
- Add custom fields to Assets
- View the assigned Inventory for individual Customers in the Customer Section
- Manage the Inventory using our API
Add an Asset

Editions: Enterprise Only

To add a new asset, click the “New Asset” button from the main Inventory screen.

Inventory

All Assigned Warehouse Junkyard

Search for an asset.

Fill in the following form and click save.

The Product pull down displays all of the products you have created under the Product Section within TeamSupport. The appropriate versions will be displayed based on the product selection.

If you do not specify an Asset name, the auto-generated asset ID will be used.

The Additional Information section lists any custom fields that you have setup for Assets. Click here to learn how to add Custom Fields.

New assets will default to the Warehouse.
Manage an Asset

Editions: Enterprise Only

Details Tab

When you open an asset, depending on the assignment of the asset (Assigned, Warehouse, or Junkyard), you can take one or more the following actions:

- Assign
- Return
- Junk
- Edit
- View History

Assign Asset

To ship/assign an asset to a Customer or Contact, click on the “Assign” button.

Fill out the following form and click save.
The Customer name and date are the only required fields in this form. This asset will now be moved to the Assigned Tab, and can be found under the Inventory tab for that customer in the Customer section.

**Return Asset**

Typically you will want to return the asset back to the warehouse when the asset is returned from the customer. This allows the Asset to be in the Warehouse, making it an available asset. You are then working with a clean slate if you need to “Assign” the asset again to a new/different customer. Your other option is not to “Return” the asset back to the warehouse, but instead choose to “Assign” it directly to a new customer. In this case, all of the contacts will remain associated to the asset. Furthermore, if you associate the asset with a ticket, all contacts assigned to the asset will be added to the ticket.

To return an asset back to the Warehouse, click the “Return” button.

Fill out the following form and click save.
The date is the only required field. This asset will now be moved to the Warehouse tab.

**Junk Asset**

To send an asset to the Junyard tab, click the “Junk” button.

Fill out the following form and click save.
Adding a comment is optional. This asset will now be moved to the Junkyard tab. This implies that this asset is no longer available to ship to customers, however you can still keep it in your system for informational purposes.

**Edit Asset**

To edit an asset, click the “Edit” button. The button will turn green when in edit mode. When you are finished editing, click the edit button again and it will return blue.

While in Edit mode, the Asset Info fields will turn blue. Click on any of the fields to edit them.
Asset Assignments History

If you would like to see the assignment history of a given asset, simply expand the Assignment History section. This will show you every assignment that has happened over the life of the asset.
Asset History

If you would like to see the action/edit history of a given asset, simply expand the Asset History section. This will show you every action that has happened over the life of the asset.

Tickets Tab

This tab has the same ticket grid that is found throughout the TeamSupport application.
Files Tab

2501917TA

File Name | Description | Attached By | Date Attached
----------|-------------|-------------|-----------------|
Screenshot 2018-07-13 at 12.03.21 PM.png | | Kimberly Cook | Fri Jul 13 2018

You have the option of attaching a file to your Inventory Asset. For example, you may want to upload an image of the asset before shipment. The maximum file attachment size is 25MB per file.

To upload attachments, click the “Add Files” button. You may drag and drop or browse your computer for the files.
We’ve recently rebooted the reporting section. It’s better, faster, easier, cleaner and way more powerful! Watch our webinar above which covers how to create reports.

TeamSupport offers advanced reporting capabilities which you can use to view your data in virtually any way you want.

Several pre-defined “Stock” reports come standard as a part of your TeamSupport subscription, and you can also create Custom Reports and Ticket Views to easily access information and analyze data. You can add any report to your Dashboard to have this information at your fingertips.

**Reporting Overview**

Click on Reports on the left hand navigation.
Top Section

- **Search**: Begin by selecting the appropriate section on the left hand side of the reporting window. Next, type in any part of the report name to narrow down the list of results. Please note that the results will only be returned that are within the same section that you have selected on the left hand side of the reporting window.
- **Create a Report**: Allows you to create a [Custom Report, Folder], or [Ticket View].
- **Move to Folder**: Click one or more boxes to the left of a report, then click the folder button to move.
- **Delete**: Click one or more boxes to the left of a report, then click the trash button to delete.
- **Clone**: Click one or more boxes to the left of a report, then click the copy button to create a clone of the report.
- **Schedule**: You can schedule a report to be emailed on a recurring basis.
- **Refresh**: Click the refresh button to update the screen.
Left Hand Section

- **Starred**: Reports that have marked with a star on the grid will be displayed here for you to easily access.
- **All Reports**: All reports in your account.
- **Scheduled Reports**: You can schedule a report to be emailed on a recurring basis. Any report that has a schedule associated to it will be displayed in this section.
- **Tabular**, **Summary**, **Charts**: Tabular, Summary, Charts, External: Only the specified type of report will be displayed in their respective sections. Click [here](#) to learn more about how to create a Custom Report.
- **Ticket Views**: Ticket Views allow you to view your data more easily in the [My Tickets](#) section.
- **Custom**: Reports that TeamSupport has created for your account will be displayed in the Custom section.
- **Stock**: Default Reports that TeamSupport displays on all accounts will be displayed in the Stock section.
- **Folders**: Allows you to organize your reports.
Report Grids

- **Checkbox**: You can select one or more reports to take action from the options in the top section.
- **Starred**: You may star any report so that you may easily access it from your “Starred” section on the left hand side of the report window.

Please note that you may sort in either direction on any of the following fields:

- **Report Name**: The name that the report was given. An icon representing the type of report (Tabular, Summary, Chart, Ticket View, External) will be displayed to the left of the name.
- **Owner**: The User who created the report.
- **Last Viewed**: The last time this report was viewed by you.
- **Last Modified**: The last time the report was modified. The name of the modifier may be displayed to the right.
Create a Custom Report

To create a Custom Report, click on Reports on the left hand navigation, then click the Create button. You will be presented with the following menu:

New Folder
Creating a folder allows you to organize your reports. All folders will be displayed at the bottom of the left hand section of the reporting window. Folders will allow you to organize your reports. All reports in folders are copies, and a duplicate can be found in the respective section above.

The steps below are similar for several of the reports.

- **Tabular Report**: Tabular reports will allow you to view data in a “raw” format, similar to rows in a spreadsheet.
- **Summary Report**: Summary reports show data in a grid format with calculated fields. For example, you can display a count of the number of open tickets segmented by their [Ticket Types](#).
- **Chart**: Charts allow you to display your data graphically in a Pie, Line, Area, Stacked Area, Bar, Stacked Bar, Column, or Stacked Column format.

**Step 1: Setup for All Reports**
New Tabular Report

Setup your report

Report Name
Enter report name...

Private Report
Everyone Can See It

Primary Table
Agent Ratings

Secondary Table
None

- **Report Name**: This is a required field
- **Private Report**: A user can create a report that is visible to all users by selecting “Everyone Can See It”, which is the default value. Otherwise, a private report can be created by selecting “Only I Can See It”. A private report will only be available to view by the report creator.
- **Primary Table**: This is a required field and will be the table where all or most of the data you are interested in reporting against will be housed.
- **Secondary Table**: Optional – If the data is not housed in the Primary table, you may require a secondary table for your report.

Step 2: Field Selection for Tabular Report
The fields that you select will be displayed as columns in your report. You may filter against fields that are not displayed. Please note that custom fields are available in this list in the custom fields section. If your field does not appear in this list, it is possible that you may need to include a secondary table from Step 1.

**Step 2: Field Selection for Summary Report**

![New Summary Report](image)

**What data do you want to report on?**

**Descriptive Fields**

- Assigned To

Add Field

**Calculated Fields**

- Ticket Name
- Count
- No Limits

Add Field

- Descriptive Fields: Add one or more fields that will be listed as columns in your report. If there are multiple values returned for the field selected, they will appear a their own line.
- Calculated Fields: Add one or more fields that will be listed as columns in your report with a calculated value as the row result. The calculation option will vary depending on the field that is selected. You may set limits on the values for the calculated fields – similar to a filter. For example, you may want to only return results that have a count of greater than zero.

In the screenshot above, the results would be that all users will be returned on their own row, alongside the count of their tickets.

**Step 2: Field Selection for Chart**
• X Axis (Horizontal Axis): Add one or more fields that will be listed as a Series in your report. If there are multiple values returned for the field selected, they will appear at their own point on the horizontal axis of the graph. Please note that you are not able to select more than one series for a Pie Chart.

• Y Axis (Vertical Axis): Select one field that will be displayed along the Y axis of your chart with a calculated value as the result. The calculation option will vary depending on the field that is selected. You may set limits on the values for the calculated fields — similar to a filter. For example, you may want to only return results that have a count of greater than zero. For Pie charts, rather than being a point on the chart, the values will be displayed as a percentage of the whole.

In the screenshot above, the results would be that all users will be returned as their own point on the chart, alongside the count of their tickets.

Step 3: Optional Filtering for All Reports

You may filter the data in your report. Examples include filtering on Ticket Types, Groups, Date Created, Closed status, etc. Depending on the field selected, you will receive different options for criteria. Toggle
between AND and OR by clicking the AND button. You may add multiple filters by clicking the +Condition button. You may add groups of AND/OR filters by adding +Group. For example:

![Filter your data](image)

This filter would return all Open tickets that are assigned to Kimberly OR Michael.

Note that you can also set the “Assigned To”, “Creator Name”, or “Modifier Name” fields to “The Report Viewer”. This will let you create one View which you can use for every TeamSupport user in your account. For example, this following View could be set to “Everyone Can See It” and each person would just see a list of tickets assigned to them:

![Ticket Views](image)

**Step 4: Preview and Chart Properties**
Click the Preview button to preview your chart before saving to ensure the chart is displaying correctly.
You have several options for customizing your chart.

- **Chart Type**: Select Pie, Line, Area, Stacked Area, Bar, Stacked Bar, Column, or Stacked Column
- **Title, Subtitle, Y Axis Title**: To describe your report
- **Tool tip Suffix**: This will appear after the numerical calculation when you hover over a series on a chart.
- **Legend Layout**: Will display the legend vertically or horizontally.
- **Legend Align**: Allows you to display the legend Right, Left, or Centered.
- **Show Data Labels**: Select whether you would like the calculated values to be displayed on the graph.
If this is no, the data is still displayed when you hover over the chart.

**Ticket Views**
Ticket Views help you to find and manage your tickets by allowing you to select columns and filter data similar to a report. The difference is that Ticket Views are conveniently located in your My Tickets section. Click [here](#) to learn more about Ticket Views.

**External Report**
External Reports allow you to display an external page accessible via a secure (https) URL, and display it on your Dashboard.

> Please note that we will only display secure information. If the information you are linking to cannot be displayed securely, we will not display it.

External Reports may be used to display important information such as system monitoring reports, and other utilities that are important to your daily operation.

**Step 1: Setup External Report**

![New External Report](#)

Setup your report

<table>
<thead>
<tr>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter report name...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>External URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a website's url...</td>
</tr>
</tbody>
</table>

You must type in a Report Name and an External URL.

**Step 2: Add External Report to Dashboard**
Click on Dashboard on your left hand navigation, and click the + button in the upper right hand corner. Type in the name of your External Report, and click Add Report. Click here to learn more about Dashboard settings.

Top Menu of any Report

- **Edit**: Click this button to go back through the editing process that is described above.
- **Export**: You may export any Report to CSV or Excel format.
- **Star**: Starring a report will add it to your “Starred” menu on the right hand side of the main Report screen.
- **Schedule**: You may schedule a report to be emailed on a recurring basis.
- **Filter**: Click this button to adjust your filters as described above.
• **Refresh**: If your report is open, and the data in the report has been updated, you must refresh your report to see the updated data.
Create a Ticket View

Ticket Views are available for you to further define the tickets you need to view by allowing you to select columns, and filter data, similar to a report. The difference is that Ticket Views are available in the My Tickets or All Tickets section.

To create a Ticket View, click Reports from the left hand navigation, click the Create button, then click “Ticket View”.

Step 1: Setup

Ticket Views

Setup your report

Report Name

Enter report name...

Private Report

Everyone Can See It
• **Report Name:** This is a required field.

• **Private Report:** A user can create a view that is visible to all users by selecting “Everyone Can See It” and all users will see the View in the [All Tickets] submenu. “Everyone Can See It” is the default value. Otherwise, a private Ticket View can be created by selecting “Only I Can See It”, which will show up under the creators [My Tickets] submenu.

### Step 2: Field Selection

#### Ticket Views

<table>
<thead>
<tr>
<th>Select some fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>UserTicketsView Assigned To</td>
</tr>
<tr>
<td>UserTicketsView Category Name</td>
</tr>
<tr>
<td>UserTicketsView Closer</td>
</tr>
<tr>
<td>UserTicketsView CloserID</td>
</tr>
<tr>
<td>UserTicketsView Contacts</td>
</tr>
<tr>
<td>UserTicketsView CreatorID</td>
</tr>
<tr>
<td>UserTicketsView CreatorName</td>
</tr>
<tr>
<td>UserTicketsView CreatorModifierName</td>
</tr>
<tr>
<td>UserTicketsView DateClosed</td>
</tr>
<tr>
<td>UserTicketsView DateCreated</td>
</tr>
<tr>
<td>UserTicketsView DateModified</td>
</tr>
<tr>
<td>UserTicketsView DateModifiedBySalesForceSync</td>
</tr>
<tr>
<td>UserTicketsView DaysSinceCreated</td>
</tr>
<tr>
<td>UserTicketsView DaysSinceModified</td>
</tr>
<tr>
<td>UserTicketsView DaysClosed</td>
</tr>
<tr>
<td>UserTicketsView DaysOpened</td>
</tr>
</tbody>
</table>

The fields that you select will be displayed as columns in your report. You may filter against fields that are not displayed. Please note that custom fields are available in this list.

⭐ The popular graphical boxes which you can toggle for Read, Flag, Subscribe, and Queue are available in Ticket Views. To display these, you must choose the fields IsRead, IsFlagged, IsSubscribed, IsEnqueued from the field list

### Step 3: Filter
You may filter the data in your ticket view. Examples include filtering on Assigned User, Ticket Types, Groups, Date Created, Closed status, etc. Depending on the field selected, you will receive different options for criteria. Toggle between AND and OR by clicking the AND button. You may add multiple filters by clicking the +Condition button. You may add groups of AND/OR filters by adding +Group. For example:

This filter would return all Open tickets that are assigned to Kimberly OR Michael.

Note that you can also set the “Assigned To”, “Creator Name”, or “Modifier Name” fields to “The Report Viewer”. This will let you create one View which you can use for every TeamSupport user in your account. For example, this following View could be set to “Everyone Can See It” and each person would just see a list of tickets assigned to them:
Ticket Views will accessible by expanding down the My Tickets section for private views, and the All Tickets section for views that everyone can see on the left hand navigation. The Ticket View grid follows the same rules as the My Tickets grid. One addition is that you may edit the Ticket View from the My Tickets section by clicking on the pencil icon.
Scheduled Reports

Scheduling a Report can be an excellent way to make your Reports even more useful. Here are several use cases for scheduling reports:

- SLAs and capturing the amount of support that was given to a customer in a certain timeframe can be time sensitive. To ensure that you capture the moment in time, you can schedule a report to be emailed to you at the correct time.
- If your customers request reports from you, it may be easier to have these reports scheduled and emailed to your customers directly.
- Rather than having to remember to look over your monthly metrics by accessing the Reporting section, it may be more convenient to you for TeamSupport to deliver these Reports to your inbox on a scheduled basis.

To schedule a report, Click on the Schedule button at the top of the report or grid:

The following menu will appear:

- **Email Subject**: This field will be sent as the subject of the email for the report.
- **Email Body**: You may include any introduction to the report in the email body. This will be included in the Scheduled Report Email Template. You may further customize this Email Template to include additional leading/trailing text and/or placeholder variables.
• **Email Recipients**: You may include one or more email addresses separated by comma.
• **Start On**: Indicate the time and date you would like the schedule to begin.
• **Frequency**: Allows you to run the report once, daily, weekly, or monthly basis.
• **Active**: Check this box to make the schedule active, otherwise, the schedule will not run.

All of your Scheduled Reports will show on the Main Report Grid under the “Scheduled Reports” sub menu.

• **Edit**: You may click on the Schedule Report at any time to make changes.
• **Green/Grey Clock Icon**: A green clock icon indicates the report is active. A grey clock icon indicates the report is not active.
• **Delete**: To delete a Scheduled Report, click on the box next to the name, and click the trash icon. This cannot be reversed.
• **Refresh**: The refresh button can be used to refresh the grid if you are expecting to see changes.

Click [here](#) to learn more about Reports.
Ratings

TeamSupport gives you the ability to create a customer feedback loop, which gives you valuable insight into the satisfaction of your customers.

Please note: If you signed up for TeamSupport after June 28, 2014, Ratings will be pre-configured in your account. For customers who had an active account on or before June 28, 2014, setup is required.

TeamSupport can send out an email to your customers after a ticket is closed to ask them to rate their Customer Support experience. The rating will be applied to all users who added a visible (public) action to the ticket.

Quick Tips

- You can write custom reports for your Ratings. Click here to learn how to create a custom report.
- You can use rating as a condition in Ticket Automation. For example, you can post a shout out on Water Cooler when your team receives a positive rating.

Viewing Ratings

To view ratings for a user, click on their "Ratings" tab in the User section.
Each rating for the selected user will be listed on a separate line with the Ticket Number, Agent(s) who added a visible action on the ticket, the Customer who reported the rating, their Company association, Date reported, Rating (Happy, Neutral, or Unhappy), and an optional comment.

To view all ratings, click the “View All” link, or you can filter the results by rating type by clicking on the icon. Additionally, you may filter the ratings based on the Product Line that was selected on the ticket by choosing a Product Line from the drop down menu. Your user rights apply to which Product Lines you may have available to you.

In addition to viewing the ratings in the User section, you can also view all of the ratings a particular customer has left by viewing the Ratings tab in the Customer section.

**Customer Presentation**

Here is how the ratings are presented to your customers:

When you close a ticket, your customers will be asked to provide feedback similar to the following email:
When they make their selection, they will be redirected to a page where they can provide an additional comment:
We’re happy you had a great experience with our team! Would you like to share any details?

(optional)

When they click “Submit” they will be redirected to a “Thank you” page:

Thank you for helping us improve our service!

Setup

Click here to learn how to setup Ratings.
What’s Left?

Ready for more?

Click here for Advanced Admin Functions such as advanced Custom Fields, Customer Hub customization, and Ticket Automation setup.

Click here to explore Big Picture Topics such as ways to Collaborate in TeamSupport, Web Conversations, and E-Mail Best Practices.

Need Help?

Visit the Help Center page.
Advanced Admin Functions

TeamSupport gives you simple, yet robust tools in order to customize your system.

The Admin section of TeamSupport is only visible to those with Administrative rights. If you do not see the Admin section and feel you should have access, please contact your TeamSupport administrator.

Browse this section for Advanced Admin Functions such as:

- General System Settings
- Customer Hub Settings
- Custom Fields
- Custom Properties
- SLA
- Workflow
- Email Integration
- 3rd Party Integrations and API
- Ticket Templates
- Ticket Automation
My Company Settings

The My Company tab contains multiple tabs that control global settings for your TeamSupport account.

- **Account Settings**: The first tab in the Admin section stores the basic information about your company and your Chat settings.
- **CDI Rating**: The Customer Distress Index (CDI) is a customizable metric which gives you insight into the happiness of your customers.
- **Agent Ratings**: Contains settings to define ratings that are sent to your customers
- **Ticket Page Order**: The left hand side of your new and existing ticket pages contains a wealth of information. You have control over the order in which these fields are displayed, and you may remove some fields which are not needed.
- **Data Import**: Oftentimes customers will have data which needs to be pulled into their new TeamSupport account. This can be done using CSV files through our Data Import tool. New data can also be pulled in on an ongoing basis.

Account Settings

To edit this information, click the “Edit Properties” Button in the upper right hand corner.
### Account Settings

<table>
<thead>
<tr>
<th>Properties and Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Bits and Bytes Software</td>
</tr>
<tr>
<td><strong>Description:</strong> Software Company</td>
</tr>
<tr>
<td><strong>Organization ID:</strong> 1088</td>
</tr>
<tr>
<td><strong>Primary Contact:</strong> Michael Scott</td>
</tr>
<tr>
<td><strong>Default Font Family:</strong> Unassigned</td>
</tr>
<tr>
<td><strong>Default Font Size:</strong> Unassigned</td>
</tr>
<tr>
<td><strong>Date Format:</strong> English (United States)</td>
</tr>
<tr>
<td><strong>Time Zone:</strong> (UTC-06:00) Central Time (US &amp; Canada)</td>
</tr>
<tr>
<td><strong>Business Day Start:</strong> 9:00 AM, (UTC-06:00) Central Time (US &amp; Canada)</td>
</tr>
<tr>
<td><strong>Business Day End:</strong> 5:00 PM, (UTC-06:00) Central Time (US &amp; Canada)</td>
</tr>
<tr>
<td><strong>Business Days:</strong> Monday, Tuesday, Wednesday, Thursday, Friday</td>
</tr>
<tr>
<td><strong>Product Required on Ticket:</strong> True</td>
</tr>
<tr>
<td><strong>Product Version Required on ticket:</strong> False</td>
</tr>
<tr>
<td><strong>Only show products for the customers of a ticket:</strong> True</td>
</tr>
<tr>
<td><strong>Only show product versions for the customers of a ticket:</strong> False</td>
</tr>
<tr>
<td><strong>Auto Assign Customer with Asset On Tickets:</strong> True</td>
</tr>
<tr>
<td><strong>Auto Associate Customer To Ticket based on Asset Assignment:</strong> True</td>
</tr>
<tr>
<td><strong>Require customer for new ticket:</strong> False</td>
</tr>
<tr>
<td><strong>Require time spent on timed actions:</strong> False</td>
</tr>
<tr>
<td><strong>Disable ticket status update emails:</strong> False</td>
</tr>
</tbody>
</table>
Field Definitions

- **Name:** Company Name. If you would like to change this, please contact TeamSupport.
- **Description:** A description of your company.
- **Organization ID:** This is a system field for use by TeamSupport.
- **Primary Contact:** This is where you set the administrative or primary contact in TeamSupport. This is the user we (TeamSupport) will contact with information regarding billing, system down time, new features, etc.
- **Time Zone:** This setting impacts time stamps for all actions in your account. In addition, each user on your team can override this setting. This is very useful for remote teams.

- **Date Format:** Depending on your country, you may like to see the date formats as you use them. For example, in the U.S. we typically use MM/DD/YYYY. In the UK, it is standard to use DD/MM/YYYY. This is also a User setting so that if you have TeamSupport users in other countries, they can view the date format as they are used to seeing it. Everyone’s happy!

- **Default Font Family/Size:** This font will be used as the default font for actions within tickets. You may also setup the fonts on a per user basis in the User section.

- **Business Days:** This setting impacts your SLA's. Based on the days you have defined as “business
days”, you can set your SLA’s to pause during non business hours.

- **Business Day Start/End:** Same as Business Day description.

- **Product Required on Ticket:** Determines if you require a Product selection to be made on a ticket. If this is set to True, a user will be prompted to select a Product if they attempt to create or edit a ticket.

- **Product Version Required on Ticket:** Determines if you require a Product and a Product version selection to be made on a ticket. If this is set to True, a user will be prompted to select a Product and a Product Version if they attempt to create or edit a ticket.

- **Only show products for the customer of a ticket:** Applies to Enterprise Edition only. Setting this to true will only show the products that have been associated to the customer who is associated to the ticket.

- **Only Show Product Versions for the customers of a ticket.** Applies to Enterprise Edition only. If set to True, the Product Versions available to TeamSupport Users on a ticket are restricted to the Products associated with the Customers that are on the ticket. **NOTE:** If a Customer is associated to a Product only rather than a Product Version, all Versions will be available.

- **Auto Assign Customer with Asset On Tickets:** Default is True. If set to True, when you associate an asset to a ticket, any Customer/Contact associated to the ticket will also be associated to the asset.

- **Auto Associate Customer To Ticket based on Asset Assignment:** Default is True. If set to True, when an asset is associated to a ticket, the Customer/Contact(s) who are associated with that Asset will also become associated to the Ticket.

- **Require custom er for new ticket:** When active, users will not be able to save a new ticket unless a customer/contact has been associated with the ticket.

- **Require time spent on timed actions:** When active, users will not be able to save a new ticket action unless they enter in how much time they spent.

- **Disable ticket status update emails:** If set to True, a ticket update email will not be sent to anyone when only the ticket status changes.

- **Visible to customers is initially enabled for new actions:** This setting determines the initial value for the “Visible to Customers” check box when a new ticket is created by a user. The recommended, and default, value for this setting is False.

- **Allow unauthenticated users to view attachments:** Default is True. When true, any embedded
images that are sent to your customers within tickets will be viewable by your customers from within their email. The overwhelming majority of our customers will leave this setting to True. In rare cases, where viewing attachments in email is considered a security issue, you may set this to false. In this case, when emails are sent out that have embedded images, the will not be viewable in email. Your customers will be always able to view the images by visiting the Customer Hub.

- **Allow private actions to satisfy SLA first response:** If set to True, a private action (which is not visible to customers) will satisfy the first response condition for the associated SLA. Click here to learn more about SLAs.

- **Default Wiki Article:** Each time you visit the Wiki section, the article you define here will always be the first to appear.

- **Only admin can view reports:** When active, only users with admin rights will see the reports section.

- **Internal SLA:** In addition to the typical use case for customer support, we take this feature a step further to allow our customers to create and define their own “internal” SLA. This SLA applies to tickets that do not have any customer or product association, and is a great way to stay on top of internal tickets. The SLA you would like to use for the Internal SLA must first be defined in the SLA section, then it can be selected here.

- **Show Group Members First in Ticket Assignment:** When active, on a ticket the “User Assignment” drop down list will first list the members of the group in which the ticket is currently assigned.

- **Require Group on a Ticket:** Default is False. This setting will cause a group to be required on a ticket before a user can create a new ticket or save any edits. The “Default Group” found in the Customer Hub settings satisfies this settings requirement.

- **Update Ticket Children Group With Parent:** When active, if the “Group” of a Parent Ticket is reassigned, the change will also be made on all it’s child tickets. Click here to learn more about relating tickets.

- **Hide Alert Dismiss for Non Admins:** When active, non-admins will not have the ability to dismiss an Alert. Click here to learn more about Alerts.

- **Use Product Lines:** Default is “True”. Set to “False” to disable this feature.

- **Customer Insights:** This setting will pull public information into your customer record. Default is “True”. Set to “False” to disable this feature.

- **Two Step Verification:** This setting will require users to supply a verification code sent to their cell phones when they sign in from an unidentified computer. This setting will Default is “False”.
• **How many days before user passwords expire:** When set to a number other than 0, this will force your users to change their password after a certain number of days. The default is “0”, which means passwords will not expire.

• **Do not include attachments in outbound emails (Optional: Except for the following Product Lines):** The default setting is off (false), which means attachments will be included with outbound emails. Checking this box will cause an additional box titled “Except for the following Product Lines” to appear. The result will be that attachments will not be sent on outbound emails excluding any tickets associated with any selected Product Lines.

• **Except for the Following Product Lines:** This setting will only appear if “Do Not Include Attachments in Outbound Emails” is set to True (see above).

• **Warn if Contact has no Email Address:** The default setting is True. When True, you will receive a pop up warning message if you attempt to add a Public Action to a Ticket which has a Contact that has no email address. To avoid this pop up message, set this value to False.

• **Use Watson:** Default is True. Select False to disable the Watson/Sentiment feature. TeamSupport is leveraging IBM’s Watson technology to provide internal sentiment analysis on Ticket Actions. You may notice public Actions scored with sentiments like satisfied, polite, and frustrated, along with scoring on the Ticket.

### Customer Chat Settings

The My Company tab contains a Chat section. Click here to learn how to configure your Customer Chat options.
Additional Settings

Multiple phone numbers and addresses can be listed on this page for your company. Addresses and phone numbers can be referenced in various places within your app including in email templates. To add an address or phone number, simply click the “+ Phone Numbers” or “+ Addresses” button. Phone Numbers contain a customizable Phone Type which can be configured in your Admin panel.
Two Step Verification

Protecting your data is a major priority for TeamSupport. This is why we offer an optional Two Step Verification for authenticating users.

When enabled, this will utilize your user’s cell phones to provide a second layer of security for their accounts. When a user logs into TeamSupport from a computer that we don’t recognize, we will send them a text message with an authentication code they will have to use in addition to their password.

Enabling Two Step Verification

Browse to Admin->My Company-> “Two Step Verification”. The default is False, and setting this to True will enable this feature.

The next time a user logs in to their account, the following window will be displayed:

After they click submit, a text message with a verification code will be sent to their inputted cell phone number. The following page will be displayed for them to input their verification code:
User Settings

The cell phone number that was inputted by the user will be stored in their User Settings. Administrators can change this phone number at any time should the cell phone number be entered incorrectly, or if there is a change in cell phone number.
Customer Chat Setup

Customer Chat provides an additional channel for your customer to reach your Support team. Some of your customers may never use chat, but others may gravitate to this method if it is available. It is good to provide several different channels of communication and let your customers decide which one they prefer.

TeamSupport’s Customer Chat has integrated Audio, Video, and Screen Share (Enterprise Only Customers). This lets you effortlessly switch to a more interactive session should the need arise.

Once you have chat configured, click here to learn how you and your customers will use chat.

Setup Chat Users

Any member of your team can be a chat user. By default, Chat is enabled for new users you create in your account. This setting is located in the Users -> User Properties -> “Customer Chat User”. The user will need to refresh their browser, or log out and back in order to log in to Chat.

Setup Chat Interface

Navigate to the Admin section -> My Company tab and scroll to the Chat section and click the Edit Chat Properties link.
Available Options

- **Online/Offline Buttons:** This setting applies to the “Classic Customer Portal” only and does not apply to the Customer Hub. You have the ability to select which buttons will be used for Online/Offline chat status. When at least one of your users has their toggle button set to “Online”, the Online button will show. If all of your users have their toggle buttons set to “Offline”, the Offline button will show to your Customers. When Offline, your Customers will still have the option to submit a ticket for their question.

- **Avatar:** This setting applies to the “Classic Customer Portal” only and does not apply to the Customer Hub. You can change your avatar that will be displayed to the customer on their chat window.

- **Message:** You may customize the initial message displayed to your customer on their chat window.

- **Enable Avatars:** In the User section of TeamSupport, each user has the ability to upload their Avatar of choice. If this box is checked, this Avatar will be displayed while chatting. If left unchecked, the system will display the Users initials.

- **Enable ScreenShare/Voice Calls/Video Calls** (Enterprise Only): You may turn these options on and off depending on your preference. This is an account wide setting.

- **Enable Ticket Deflection:** If enabled, Knowledge Base articles will be suggested to customers on the initial Customer Chat screen before the chat is actually initiated. This feature can help to provide answers to your customers without the need to submit a chat request.
Press the “Save” button to return to the Admin ->My Company Screen.

By default, the Chat button is already displayed on your Customer Hub. If you are interested in placing your Chat somewhere other than the Hub, you may copy the chat code to any website that you manage.

Simply copy and paste this code to your site and that’s it! You can also test your chat by clicking the “Test” button.

**Group Specific Chat**

TeamSupport allows users to be in different Groups, for example Sales and Support. You may place multiple Chat buttons on your website that are directed to specified Groups using an added parameter in the URL. Only one Group may be specified per URL. When this parameter is used, only members of the specified Group will receive the Chat notification.

For example, using your chat link code, append &Group=Sales to the UID in your URL:

```html
<a href="#" onclick="window.open('https://app.teamsupport.com/Chat/ChatInit.asp?uid=[Your UID]&Group=Sales', 'TSChat', 'toolbar=no,location=no,directories=no,status=no,menubar=no,scrollbars=no,copyhistory=no,resizable=no,width=450,height=575'); return false;"><img src='https://app.teamsupport.com/dc/[Your OrgID]/chat/image' border='0' /></a>
```

Using this feature, you may funnel Chat activity from your website to the intended users. For example, your website Support page may have a Chat button that is directed to Support users, and your website Sales page is directed to Sales users.

**Pre-Populating Fields**

If you are using TeamSupport’s chat in an environment where the users are already logged into your application or otherwise known (note: See our documentation on Single Sign On to learn more about how to tightly integrate TeamSupport into your application), you can pass parameters to the chat interface.
The parameters you can pass are:

- "fname" for the user’s First Name
- "lname" for the user’s Last Name
- "email" for the user’s EMail address
- "msg" to fill in the text of the message box

To implement these, you will need to add the query parameters when calling the chat dialog.

For example, here would be the call to a chat session from John Smith:


Disabling Chat

There are two steps to disabling Chat.

**Step One: Disabling users**

All users in your account should have their user settings disabled. By default, Chat is enabled for new users you create in your account. This setting is located in the Users -> User Properties -> “Customer Chat User”. When Chat is disabled for a user, it will not appear on their left hand navigation and the “Customer Chat Online/Offline” button on the upper right hand of the screen will not be visible.

**Step Two**

You will need to disable the "Chat" button in your Customer Hub Settings. This is found in Admin -> My Portal -> Customer Hub Settings -> Enable/Disable Features section. Be sure to click save. Once the browser is refreshed, the Chat logo will no longer appear on the Customer Hub.
Enable/Disable Features

- Community
- Knowledge Base
- Customer Product Association
- Products
- Wiki
- Chat

Additionally, if you placed your Chat code anywhere on an external website, like your homepage, this will need to be removed.
CDI Settings

CDI Overview

One of the powers of TeamSupport is that we track a great deal of information about your customers.

The Customer Distress Index, or CDI for short, computes a single number for each of your customers which will give you an idea of how often your customers are interacting with your support department and how quickly their issues are being resolved. This can be an important metric to understand how much difficulty your customers are having with your product or service.

The CDI computes multiple individual metrics for each of your customers, and compares them with the averages of all of your customers. It’s important to understand that the CDI doesn’t measure absolute numbers, but instead it is looking at how much above or below the average of all of your customers a particular number is.

The CDI data is displayed in the Customer section via a gauge indicator. A higher CDI number indicates a higher potential for distress.

A Plus Productions

The calculated rating is displayed in the middle of the gauge, and is also displayed if you hoover over the gauge.

CDI Trend

While the CDI number gives you a great indication as to the health of your customers, it is a static number and doesn’t give any indication of which way the CDI is moving. To address this, we have added the CDI
Trend Indicator.

The CDI Trend Indicator is a red arrow pointing up, or a green arrow pointing down above the CDI gauge. When the CDI computations are run, TeamSupport also looks at the average CDI of the past 10 days for that customer and then displays an arrow indicating which way the CDI is moving. A red arrow pointing up indicates that the CDI is trending higher (not a good thing), and conversely a green arrow pointing down shows that the CDI is moving in the right direction.

Please note that since the trend is based on the prior 10 days of CDI data, the trending information may not be accurate for new accounts or if the CDI Weights have been recently changed.

Understanding which direction the CDI is moving for a given customer is critically important data and will help you understand and spot potential issues before they become large problems.

Making the most of CDI

CDI is integrated with several areas of TeamSupport:

- **Reporting**: In the Customers table, you can access the CDI data via the Customers.Customer Distress Index and Customers.Customer Distress Index Trend fields. The Trend number will be a -1 (good – trending down), 0 (no change over the last 10 days) and 1 (bad – trending upwards). The CDI number will be a value 0-100; the same as is displayed in the Gauge.
• **Custom CDI Ticket Widget:** A popular Ticket Widget utilizes CDI data to display on the ticket page. This makes the CDI data even more valuable to your everyday TeamSupport users.

• **Ticket Automation:** CDI Value and CDI Trend are available in Ticket Automation as a condition. This will allow you to take action if a Customer’s CDI value meets a certain threshold. For example, if a new ticket has a Customer association whose CDI is above 80, you can alert all users via a WaterCooler post.

• **Ticket Types:** Ticket Types are a core feature of TeamSupport and allow you to classify tickets in a structured manner. An option is provided for each Ticket Type which will excluded it from the CDI calculation. This may be necessary for Ticket Types that are not related to the satisfaction of your Customers, or skew the metrics (i.e. automatically generated tickets, internal tickets).

### CDI Settings

To configure the CDI in your account, from the left hand navigation, select Admin->My Company->CDI Rating tab.
The CDI (or Customer Distress Index) is a proactive tool you can use to quickly determine the overall health of your customers. This is where you will weight the metrics, and the results can be viewed on each customer record. Detailed setup instructions can be found here. (http://www.teamsupport.com/documentation/1/en/topic/customer-distress-index-cdi)

The CDI runs once per day, and the last time your account processed was: 10/3/2018 10:00 PM

To force an update now, please click the force update button below.

<table>
<thead>
<tr>
<th>Field Definition</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Tickets Created in lifetime of account</td>
<td>10%</td>
</tr>
<tr>
<td>Tickets Created in the Last 30 Days</td>
<td>10%</td>
</tr>
<tr>
<td>Number of tickets currently open</td>
<td>10%</td>
</tr>
<tr>
<td>Average time open tickets have been open</td>
<td>20%</td>
</tr>
<tr>
<td>Average time closed tickets took to close</td>
<td>20%</td>
</tr>
<tr>
<td>Ticket Sentiment</td>
<td>5%</td>
</tr>
<tr>
<td>Action Count</td>
<td>5%</td>
</tr>
<tr>
<td>Ticket Severity</td>
<td>20%</td>
</tr>
<tr>
<td>Agent Ratings</td>
<td>0%</td>
</tr>
<tr>
<td>Total Weight</td>
<td>100%</td>
</tr>
</tbody>
</table>

The total weights must equal 100%.

Field Definitions

- **CDI Rating**: Contains a timestamp for the last time your CDI was processed. Your CDI is indexed once per day, but you can force update using the “Force CDI Update” button.
• **Weights**: There are multiple weights which you can configure.

• **Force CDI Update button**: This button will allow you to force your CDI to be indexed. The CDI is automatically indexed once per day. A forced index could take up to 30 minutes.

• **Chart Green Upper Range**: Indicates the upper limit that your CDI gauge will show as Green, or meaning low distress.

• **Chart Yellow Upper Range**: Indicates the upper limit that your CDI gauge will show as Yellow, or meaning moderate distress. This value must be equal to or greater than the Green Upper Range in order to save.

**Weights**

There are multiple metrics that the CDI computation uses. They must all total to be exactly 100%. If you do not wish to include one or more of the weights in the calculation of the CDI, simply set to weight to 0%.

• **Total Tickets Created in Lifetime of Account**: The total number of tickets (that are both open and closed) which have been created over the lifetime of a given customer. This measures the total volume of interactions that a customer has had with your support team, and a high number here could indicate a customer who has needed a lot of help and handholding as compared to your other customers.

• **Tickets Created in the Last 30 Days**: This measures how active a customer has been recently and may be an early indicator of problems with a particular customer. This metric uses the tickets that have been created in the 30 days of most recent ticket data. Typically this means it will use the last 30 days from the current date, but may look back further (i.e. 30-60 days from the current date) if recent data is not available.

• **Number of Tickets Currently Open**: Measures the number of tickets which are open, without regards to how long they have been open. This is a measure of the backlog, and a high number here could indicate a customer who is frustrated with a lack of follow up and response from your support team.

• **Average Time Open Tickets Have Been Open**: This measures how “stale” tickets are by looking at the amount of time they have been open and not addressed. While this is related in many ways to the above metric (total number of tickets currently open), it differs in that it looks at how long they have been open and not the number of tickets. There is a direct correlation between how long a ticket has been open and the frustration level of your customers.

• **Average Time Closed Tickets Took to Close**: This metric will show if it has taken longer, on average, to address this customer’s tickets and could indicate frustration because of the lack of timeliness in resolving their issues. This metric uses the last 30 days of most recent ticket data. Typically this means it will use the last 30 days from the current date, but may look back further (i.e.
30-60 days from the current date) if recent data is not available.

- **Ticket Sentiment**: TeamSupport is leveraging IBM’s Watson technology to provide internal sentiment analysis on Ticket Actions. This metric uses a Customer sentiment score which is an aggregation of Ticket Sentiments associated with the Customer for the last 3 years of available data. This CDI metric applies to Closed Tickets only.

- **Action Count**: A ticket can have any number of actions. It is reasonable to correlate that a higher action count indicates a higher ticket complexity and may lead to customer frustration. This CDI metric applies to Closed Tickets only and uses the last 30 days of most recent ticket data. Typically this means it will use the last 30 days from the current date, but may look back further (i.e. 30-60 days from the current date) if recent data is not available.

- **Ticket Severity**: Ticket Severity is an important field that is used throughout TeamSupport. We use a comprehensive list of names to issue a rank to the Ticket Severities. For example, 1 corresponds to Urgent emergency/outage, 2 Major, 3 Normal, 4 Low, 5 Very Low, 6 No Severity. These ranks (1-6) are used in the calculation of the CDI where Tickets with a higher rank (1 being the highest rank) will raise the CDI score. This CDI metric applies to Closed Tickets only and uses the last 30 days of most recent ticket data. Typically this means it will use the last 30 days from the current date, but may look back further (i.e. 30-60 days from the current date) if recent data is not available.

- **Agent Ratings**: Through Agent Ratings, TeamSupport gives you the ability to create a customer feedback loop, which gives you valuable insight into the satisfaction of your customers. This CDI metric applies a score based on the ratings your Customer has left on their tickets: Good rating receives a score of 1, a Neutral rating receives a score of 0, and a Bad rating receives a score of -1. The sum of the scores for the last 3 years of data is used for this metric.
Agent Ratings – Setup

Please note: If you signed up for TeamSupport after June 28, 2014, Agent Ratings will be pre-configured in your account. For customers who had an active account on or before June 28, 2014, setup is required.

There are several components to Setup Agent Ratings.

1. **Ticket Status**: You must have at least one Ticket Status which closes tickets and sends a Closed Email
2. **Email Template**: The “Ticket Closed” Email Template must be setup properly
3. **Rating Tab**: There are several options in the ratings tab which you may need to configure
4. **Embed on your Website (Optional)**: You may optionally embed your ratings page into your website using an iframe.

**Ticket Status**

TeamSupport will send out an email which asks your customers for feedback when you choose specific closed statuses. For example: you can have a status called “First Call Resolution” and “Closed-Rating” both of which close the ticket and ask your customer for feedback. You can have additional statuses that close the ticket which do not ask for feedback.

There are two settings required to setup a status for ratings: “Is Closed” and “Send Closed Email”. The status named “Closed” in the screenshot below is an example of this setup:

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Description</th>
<th>Is Closed</th>
<th>Closed Email</th>
<th>Email Response</th>
<th>Pause SLA</th>
</tr>
</thead>
<tbody>
<tr>
<td>217878</td>
<td>New</td>
<td></td>
<td>False</td>
<td>False</td>
<td>False</td>
<td>False</td>
</tr>
<tr>
<td>18317</td>
<td>Closed</td>
<td></td>
<td>True</td>
<td>True</td>
<td>False</td>
<td>False</td>
</tr>
</tbody>
</table>

Click [here](#) to learn more about Ticket Statuses.

**Email Template**

The email template that is used to send the ratings is called “Ticket Closed”. You can find this going to Admin->Email-> Email Templates section.
Here is the default code for the “Ticket Closed” email template:

```html
<font size="3"><strong>Ticket History</strong></font>

{{Actions:3}}
<br />
<hr>
<br />
<center><font size="5"><strong>Please tell us how we did!</strong></font>
<br />
{{AgentRatingsImageLink.Positive}} &nbsp;&nbsp;{{AgentRatingsImageLink.Neutral}} &nbsp;&nbsp;{{AgentRatingsImageLink.Negative}}</center>
<br />
<br />
<br />
<br />
```

Click [here](#) to learn more about Email Templates.

**Agent Rating Tab**

The Rating Tab can be found at Admin->My Company-> Agent Rating tab. Default values are provided for icons and messaging. Click [here](#) to learn about configuring these settings.

**Embed in your Website**

You may optionally embed your Ratings page into an iframe on your website. This will provide your customers with a more integrated experience with your website. If you choose not to embed your ratings in an iframe on your website, you may use the default page which does not require any further configuration. Click [here](#) for more information on how to embed your Ratings page into an iframe on your website.
Agent Ratings Tab

This section describes how to setup Ratings in your account. Please note that accounts created after June 28, 2014 are pre-configured with default values.

The Agent Rating settings tab can be found at Admin->My Company->Agent Ratings.

You are able to adjust the rating text that is presented to your customers, along with the icons associated with the 3 rating levels.
At the bottom of the tab, you have two URL options:

- **External URL**: This is the page your customers will be taken to when they click a rating from the initial email.

Here is what the default page looks like:
We’re happy you had a great experience with our team! Would you like to share any details?

(optional)

• Redirect URL: This is where your users will go after they submit a successful rating.

Here is what the default “Thank you” page looks like:

Thank you for helping us improve our service!

You will also need to make sure you setup your Ticket Statuses and Ticket Email Template correctly. Click here for details on these tasks.

Click here for additional information on how to use Ratings from within the TeamSupport application.
Embed Ratings in your Website

Embedding your Ratings page into an iframe on your website is an optional feature. The pros to doing this to provide your customers with a more integrated experience with your website. If you choose not to embed your ratings in an iframe on your website, you may use the default page which does not require any further configuration.

This process does require a bit of software development and HTML knowledge. The easiest way to do this is simply embed the call to the ratings page, with your organization ID, within the iframe tags. You need code on the top level page (the one that hosts the iFrame) which will pass the parameters from the main page to the iframe.

Your Ratings page URL is formatted the following way: https://portal.[ServerName].teamsupport.com/rating.aspx?OrgName=xxxx. Simply replace "xxxx" with your Organization ID which can be found in your account under Admin-> Account Settings -> Organization ID.

> The URL examples below contain a [ServerName] placeholder. This needs to be replaced with your Server Name, or removed if your URL does not contain a server name. How do I find my URL?

When For example, if your ratings page is at “http://www.acmeco.com/rating”, when a user clicks on a Rating selection on an e-mail they would attempt to go to


The code on the page needs to change the iframe url so it reads


There are multiple ways to do this, but we’ve provided a sample below for JavaScript.

Don’t forget to tell TeamSupport where your iframe page is located. The setting for this is called “External URL” and can be found on the Agent Ratings Tab.

Now when an e-mail is sent to a customer asking for Rating feedback, the link will point towards your iframe embedded Ratings page!

JavaScript Code Sample
JavaScript is very sensitive to capitalization, so make sure that OrganizationID and TicketNumber are capitalized correctly.

Note: You'll need to replace “xxxx” with your organization id.

```html
<html>
<head>
    <title>Portal Example</title>
    <script language="javascript" type="text/javascript">
        function pageLoad() {
            var ticketID = getQueryParamValue("TicketID", window.location);
            var organizationID = getQueryParamValue("OrganizationID", window.location);
            var rating = getQueryParamValue("Rating", window.location);
            var customerID = getQueryParamValue("CustomerID", window.location);


            var frame = document.getElementById("frmPortal");
            frame.setAttribute('src', url);
        }

        function getQueryParamValue(name, url) {
            params = url.search.substring(1);
            name = name.toLowerCase();
            param = params.split("&");
            for (i = 0; i < param.length; i++) {
                value = param[i].split("=");
                if (value[0].toLowerCase() == name) {
                    return this.unescape(value[1]);
                }
            }
        }
    </script>
</head>
```
Ticket Page Order

TeamSupport gives you the ability to customize your Ticket Page by choosing which fields are displayed, and in what order, on the right and side of your ticket window. These are organizational wide settings and will be displayed the same for all users.

To access these settings, browse to Admin-> My Company-> Ticket Page Order tab.

Here you will find two boxes. The “Ticket Page” box controls the existing ticket window, whereas the “Create Ticket Page” box controls the new (manually created) ticket window.
To reorder fields, simply drag and drop your fields in your chosen order.

You may add a line breaks in order to help visually separate fields.

If there are some fields that you do not use, you may drag them to the “Available Fields” in the bottom sections. Fields in this section will not be displayed on your ticket windows. If you change your mind, you can drag them back to the top section at any time to display them again.

**For Enterprise Customers Only:** In the “Available Fields” box you will find a “Add Custom Widget Button”. This will allow you to add custom code that will appear on the right hand side of your ticket. For example, you may choose to display data from within TeamSupport, or from an external 3rd Party system. Click [here](#) to learn more about adding a Custom Widget.
Custom Ticket Widget

Edition: Enterprise Only

TeamSupport gives Enterprise Customers the ability to add a Custom Widget to the Ticket page. This option allows you to add custom code that will appear as a widget, or plugin, on the right hand side of your ticket. For example, you may choose to display data from within TeamSupport, or from an external 3rd Party system.

In their simplest use, Widgets allow you to place straight text, or formatted HTML/CSS text, on the right side of the New Ticket or Ticket page. This can be used to easily add data from other locations of TeamSupport that aren’t natively supported by our ticket page customization.

You can also use more advanced logic by utilizing JavaScript. JavaScript is a ‘client side’ (ie it’s run on your browser, not on TeamSupport’s servers) language which is supported by all modern browsers and is easy to write and debug. Some basic uses for JavaScript would be to format the text that you are displaying (for example, if you display the CDI, color code it Red if it’s above a certain value), or do display an alert box on the page if certain thresholds are met.

More advanced used of JavaScript could allow you to pull data from third party systems and display it on the ticket page. For example, if you store the “Customer ID” in TeamSupport and have an accounting system, you could write a Widget which queries the accounting system for the customer’s balance due and display that on the ticket page if it’s greater than $0. Another idea would be to pull customer satisfaction data (NPS score or other metrics) from a customer success system and display that.

It’s also important to understand that a Widget doesn’t have to display anything at all on the ticket page but can instead be used for writing data to another system.

The potential for Widgets is almost unlimited and we’re excited to see what you can develop! We have created a new Community section where you can share Widgets that you create.

!* Ticket Widgets is considered an Advanced feature as knowledge of HTML and JS is required. While our support team will do their best to help you with Widgets, we can’t debug your JavaScript or teach you how to write code. While Widgets are very powerful, they do require understanding HTML and JavaScript and how to debug it.*

Here are some additional Widget ideas:

- Display TeamSupport’s CDI under to the Customer Name * Note that we have a tutorial in our Community section which shows how to do this.
- Display Custom Fields from the Customer section of TeamSupport
- Display a Customer Number that is used in a 3rd Party system
- Show whether the Customer is currently logged into your website
- If you have a tool that pulls system statistics from your Customers machines, you can display it alongside the Customer Name
- Create links that would open the Customer record in your CRM system

### Adding a Widget

To add a Widget, click Admin->My Company->Ticket Page Order tab. The “Add Custom Widget Button” is found in the “Available Fields for Ticket Page” section.

#### Available Fields for Ticket Page

<table>
<thead>
<tr>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resolved</td>
</tr>
<tr>
<td>Reported</td>
</tr>
</tbody>
</table>

[Available Fields for Ticket Page](#)

When you click this button, the following screen will appear:

#### Widget Code

```html
<div id="widget1">
  <script>
    var CDI = "{{Customer.CustDispIndex}}";
    var CDInt = parseInt(CDI); // turn the CDI into an integer.
    var CDITrend = {{Customer.CustDispIndexTrend}};
    var UpArrow = '\u21d1';
    var DownArrow = '\u21d3';
    var CIDString = "";
    if (CDI < 40) {
      CIDString = UpArrow;
    } else if (CDI > 60) {
      CIDString = DownArrow;
    } else {
      CIDString = UpArrow + DownArrow;
    }
    document.getElementById('widget1').innerHTML = CIDString;
  </script>
</div>
```

[Preview](#)

<table>
<thead>
<tr>
<th>Sample Ticket</th>
</tr>
</thead>
<tbody>
<tr>
<td>419</td>
</tr>
</tbody>
</table>

CDI: 68

[Show Placeholders](#)
• **Name:** Enter a name for your Widget. This field is required.
• **Widget Code:** Enter your Widget code here.
• **Cancel:** You may cancel and return the previous screen without saving by clicking the cancel button.
• **Save:** Click the Save button to save your widget. Read below for addition information on managing your Widget.
• **Delete:** You may permanently delete your Widget. Please note, you can effectively disable your Widget by moving it out of view. Read below for addition information on managing your Widget.
• **Preview:** This pane allows you to preview your Widget.
  ○ **Sample Ticket:** Enter a sample ticket number that you would like to run your Widget against.
  ○ **Refresh Preview:** Click this button to refresh the Preview pane. This is useful if you have updated your code, or if you expect underlying data to have changed.
• **Placeholders:** Throughout TeamSupport we have Placeholder values which allows you to access dynamic data in your account. The available Placeholders for Ticket Widgets are displayed at the bottom of the edit Widget screen. They include common Ticket, Customer, and Contact fields. To insert a Placeholder, move your cursor to where you wish the Placeholder to be added. Next, click the Placeholder you are interested in, and it will be added after your cursor position.

**Managing your Ticket Widget**

Once you click “Save”, you will be sent back to the Ticket Page Order screen. You will find your Widget at the bottom of the “New Ticket Page” section.

![Available Fields for Ticket Page](image)

• **Edit:** Click the pencil icon to the right of your Widget to make any changes as necessary.
• **Move:** Drag and drop the button to the left of your Widget to move it to any position you would like. You may also move it down to the “Available Fields for Ticket Page” section if you would like to remove it from view.

**Additional Resources**

Please [click here](http://example.com) to access a tutorial in our Community Forum on how to display the CDI as a widget in TeamSupport.
# Data Import

<table>
<thead>
<tr>
<th>CompanyImportID</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>104</td>
<td>CompanyABC</td>
</tr>
<tr>
<td>105</td>
<td>CompanyXYZ</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ContactImportID</th>
<th>CompanyImportID</th>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>448</td>
<td>104</td>
<td>John</td>
<td>Smith</td>
</tr>
<tr>
<td>449</td>
<td>104</td>
<td>Jane</td>
<td>Smith</td>
</tr>
<tr>
<td>1039</td>
<td>105</td>
<td>Sally</td>
<td>Jones</td>
</tr>
</tbody>
</table>
SSO (Single Sign On) with TeamSupport

Logging into TeamSupport requires a secure username and password to sign in. Typically the user is prompted to enter this information upon signing in. While this works fine for some TeamSupport customers, requiring a password creates a problem if TeamSupport is being accessed from within another application which already has authentication.

TeamSupport solves this problem by utilizing SAML (Security Assertion Markup Language) to provide authentication to users via secure tokens.

When SAML is properly configured, the user still goes through the same validation that they would for standard login, although a password is not required to be entered on the login screen. For example, if the user is inactive inside TeamSupport even when using SAML SSO, they will still be unable to login. Additionally, SAML login attempts are recorded in the user history similar to the standard login process.

Two methods of authentication are available:

- **IDP Initiated**: Authentication starts by a user of TS app authenticating through their company Identity Provider (IDP). Multiple IDP options are available including Active Directory (AD).
- **Link initiated**: Also referred to as Service Provider Initiated SSO, this authentication starts by a user clicking on a link their company provides to them.

In either of these cases, you can use SAML over HTTPS to generate and pass an authentication token to TeamSupport which will provide the credentials needed to automatically log the user into the app without further login requirements. The user email in the IDP and in TeamSupport must match in order for the authentication to work.

**Step 1: SSO Setup**

From within TeamSupport, navigate to Admin->My Company -> Single Sign On Tab.
Field Definitions

- **Enable SAML Login**: Check this box to enable/disable the SAML in your account.

It is important that SAML be fully configured before enabling SAML. If this box is checked before SAML is properly configured, the authentication for your users will fail and they will be unable to log in.

- **Identity Provider Sign In URL**: Identity provider endpoint that TeamSupport will use to redirect the user when a request to authenticate is received.

- **Identity Provider Sign Out Redirect URL**: Optional. The URL that identifies where users that have been signed out of TeamSupport via the Identity Provider will be redirected.

- **x509 Certificate**: The certificate can be obtained from your Identity Provider and is used to verify the authenticity of SAML requests to TeamSupport.

**Step 2: Configuring Your Identity Provider**

Once the form above is populated, click save and “Configuring your identity provider for TeamSupport” will populate with information necessary to configure your Identity Provider. How to configure your IDP will vary based on which IDP you are using.
Configuring your identity provider for TeamSupport

**SAML Identifier/Audience**
https://*teamsupport.com

**Assertion Consumer Service URL (ACS)**
https://*teamsupport.com/Services/LoginService.asmx/SAMLAuth?organizationGUID=8ef0fc15-

**Logout Assertion URL**
https://*teamsupport.com/Services/LoginService.asmx/SAMLSignOut?organizationGUID=8ef0fc15-

**Required SAML Attributes:**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>email</td>
<td>This is the email address of the TeamSupport user attempting to sign in.</td>
</tr>
</tbody>
</table>

**Field Definitions**

- **SAML Identifier/Audience**: Unique identifier for TeamSupport to your Identity Provider.
- **Assertion Consumer Service URL**: Your Identity Provider will use this URL for posting SAML after user validation.
- **Logout Assertion URL**: Your Identity Provider will use this URL to post to for TeamSupport logout.

**Code Snippets**

Below is an example in XML of what TeamSupport expects to be included in the IDP generated SAML when calling the sign in endpoint.

```xml
<AttributeStatement>
  <Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress">
    <AttributeValue>{email@gmail.com}</AttributeValue>
  </Attribute>
</AttributeStatement>

<AttributeStatement>
  <Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress">
    <AttributeValue>{email@gmail.com}</AttributeValue>
  </Attribute>
</AttributeStatement>
```
<AttributeValue>{email@gmail.com}</AttributeValue>
</Attribute>
</AttributeStatement>
My Portal Settings

This section deals with configuring your Customer Hub.

The Customer Hub is a replacement for our Advanced Portal and Public Portal. If you are already an Advanced and/or Public Portal user, we have provided this Migration document for you to transition to the Customer Hub. New customers who joined TeamSupport after April 21, 2017 will only see Customer Hub settings in their account.

Hub Overview

While the TeamSupport application is used by your Support agents to provide direct support to your customers, the Customer Hub is a self-service tools that your customers will use to find answers to their questions on their own by browsing your Knowledge Base and Wiki articles. They may also submit and manage their tickets as well. The Hub will translate much of the text into the native language that your customer uses on their browser. Click here to learn more about language support.

It is important to note that TeamSupport preconfigures your Customer Hub with many default settings. You may keep these default settings, but more importantly, you can change them. This section includes the following topics:

- How to use CName with your Customer Hub
- Language Support on the Customer Hub
- Suggested Solutions
- Community Settings
- Knowledge Base Settings

To set these up go to Admin->My Portal. There you will find the following tabs:

- **Customer Hub Settings Tab**: Contains settings and HTML configuration for the Customer Hub
- **Knowledgebase Tab**: Contains settings to define categories in Knowledgebase
- **Community Tab**: Contains settings to define the categories in Community
- **Custom Grid Columns**: Allows you to customize which fields are displayed on the Customer Hub Ticket Grids.
Language Support

The language in which the Customer Hub is displayed is based on your customers language settings within their browser. We accomplish this via the Google Translate API.

It is important to note that you can add custom fields to the Hub and those fields are not a part of the google translation. When you add the custom fields in your account on the tickets, you will have to label those fields in the language needed. To learn more about adding custom fields, see here.

Click here for a list of supported languages.
Customer Hub Settings

The Customer Hub has an admin page which will allow you to customize and control all of your settings.

The Customer Hub is a replacement for our Advanced Portal and Public Portal. If you are already an Advanced and/or Public Portal user, we have provided this Migration document for you to transition to the Customer Hub. New customers who joined TeamSupport after April 21, 2017 will only see Customer Hub settings in their account.

The admin page can be found by navigating to Admin -> My Portal -> Customer Hub.

There are two tabs:

- **Basic Hub Settings:** There are many option settings to configure your Customer Hub which listed on this page. If you hover over the name of the option, text will appear which will have a brief description of the setting. Click here to learn more about Changing the Customer Hub URL.
- **Advanced View Designer:** In addition to the Basic Hub Settings, you may optionally choose to configure the look and feel of your Customer Hub using HTML. This tab will require some knowledge of HTML. There is a button to revert back to default settings should any mistakes be made in the HTML. We recommend building your Hub on in a Sandbox environment so that you can test offline.
The Basic Hub Settings Tab

The Basic Hub Settings Tab contains many of the settings you need to configure your Hub. This page is also where you can add additional Hubs. The Advanced View Designer Tab allows you to edit the HTML on each page of your Hub for further customization.

We have included mouse over ALT descriptions that define most of the fields in the following image. All of the fields are defined below.

After changes are made to each section, please be sure to click save or cancel accordingly.

**Field Definitions**

**Top Section**

- **Name of Hub**: The name of your Hub will be displayed here. This name is defined in the “Portal Name” field below.
- **Add New Hub**: Multiple Hubs can be added and aligned with your Product Lines for branding purposes. This allows you to provide a refined Hub view to your Customers.
- **Basic Hub Settings Tab**: This tab will bring you back to the Basic Hub Settings described on this page.
- **Advanced View Designer Tab**: The Advanced View Designer Tab allows you to edit the HTML on each page of your Hub for further customization.
- **User’s Name**: The User who is logged in will be displayed. If you click on this field, you will be given the option to log out. Because this field is iframed into your TeamSupport app, this field is automatically displayed. This field is most useful when the page is being utilized by an actual Customer.
Primary Hub Settings

Navigation Properties

Portal Name:
Apollo

CName Redirect URL

Product Line
Apollo

Landing Page:
Apollo.{domain}

Knowledge Base:
Apollo.{domain}/knowledgeBase

Wiki:
Apollo.{domain}/Wiki

- **Portal Name:** This field defines the name of your Hub instance.
- **CName Redirect URL: Edition: Enterprise Only** You have the ability to change the name of your URL for your Hub(s) away from the default Landing Page URL listed below.
- **Product Line:** You have the ability to create an unlimited number of Customer Hubs based on your Product Lines. Configuring Multiple Hubs along Product Lines will give your Customers a further refined self-help tool. All of the Hubs will have discrete settings which allows you to completely customize your Customer’s experience along Product Lines.
- **Landing Page:** This is the default URL used by the Hub instance. You may change this URL by using CName Redirect above.
- **Knowledge Base:** This is the default URL to access the Knowledge base directly as a standalone tool.
- **Wiki:** This is the default URL to access the Wiki directly as a standalone tool.
Hub Appearance

- **Company Logo**: You may set your Customer Logo for the Hub instance.
- **Header/Footer Background**: This is the background of the header and footer used by your Hub.
- **Header/Footer Text**: This is the text color used by the header and footer of your Hub.
- **General Text**: This is the text color used on the body of your Hub.
- **Panel Tiles**: This is the color of the text on your Hub tiles.
- **Background**: This is the background color of the body of your Hub.
Hub Access Control

User Account Creation

- **Request Access**: This controls whether your Customers can request access to your Hub on the login screen.
  - **Ticket Type**: Ticket Type for when a Customer requests access to the Hub.
  - **Group**: Ticket Group for when a Customer requests access to the Hub.
- **Self Registration**: This controls whether your Customers can register themselves to your Hub on the login page.

Anonymous Access Settings

- **Anonymous Hub Access**: Controls whether anonymous users can access areas of your Hub. If the following options are turned on, they are accessible visitors who are not logged in.
  - **Anonymous Chat**: Turns on and off anonymous Chat.
Anonymous Knowledge Base: Turns on and off anonymous Knowledge Base.
Anonymous Products: Turns on and off anonymous Products.
Anonymous Ticketing: Turns on and off anonymous Ticketing.
Anonymous Wiki: Turns on and off anonymous Wiki.

Login Settings

- **Allow Single Sign On**: Here you can disable access via SSO.
- **Honor Support Expiration**: If checked, you must Products with your Customers AND there must be a date defined to “Support Expiration” which is found under the Customer section, Products tab. Otherwise your Customers will be unable to login to your Hub.
- **Honor Service Agreement Expiration**: If checked, you must enter a Service Agreement Expiration Date for each Customer, which is found under the Customer Section. If no date is defined OR the date you define has expired, your Customers will be unable to login to your Hub.
- **Require Terms and Conditions**: If checked, upon first login, a Customer must agree to the terms and conditions or they will be unable to login to your Hub.
Enable/Disable Features

Community

Community Sort Order

Last Modified

Knowledge Base

Customer Specific Articles

Customer Product Association

Anonymous Product Association

Knowledge Base Sort Order

Last Modified

Products

Wiki

Chat

Video Recording

Screen Recording

Product Line Filtering

• **Community**: Here you can turn off Community.
  
  • **Community Sort Order**: This field allows you to select a sort order for the Community posts on the Hub. The options are Last Modified and Alphabetical

• **Knowledge Base**: Here you can turn off Knowledge base.
  
  • **Customer Specific Articles**: If enabled, when you associate a Company with a Knowledge
Base article, those articles will only be displayed to the associated Company on your Hub. A Contact can also be added, in which case the Contact as well as any other Contacts within the same Company that have visibility to their organizations' tickets can view the article on your Hub. Articles without a Customer association will be displayed to all allowed Customers.

- **Customer Product Association:** If enabled, when you associate a Product with a Knowledge Base article, those articles will only be displayed on the Hub to Customers who are also associated with that Product. Articles without a Product association will be displayed to all allowed Customers.
  - **Anonymous Product Association:** Default is disabled. When disabled, users who are not logged into your Hub (browsing anonymously), will have access to articles that have a Product association. When enabled, anonymous users will be restricted from viewing Knowledge Base articles with Product associations.
  - **Knowledge Base Sort Order:** This field allows you to select a sort order for the Knowledge Base articles on the Hub. The options are Last Modified and Alphabetical

- **Products:** Here you can turn off the Products section.
- **Wiki:** Here you can turn off the Wiki.
- **Chat:** Here you can turn off the Customer Chat.
- **Video Recording:** Here you can turn off Video Recording throughout the Hub.
- **Screen Recording:** Here you can turn off Screen Recording throughout the Hub.
- **Product Line Filtering:** Default is disabled. When enabled, the following will occur:
  - Ticket Types and Groups that are associated to the same Product Line as the selected Customer Hub will be available on the Customer Hub.
  - Ticket Types and Groups that do not have a Product Line association will be available on the Customer Hub.
  - Ticket Types and Groups that are associated to other Product Lines will not be available on the Customer Hub.
  - Ticket Types that have “Visible to Customers” Disabled will not be displayed on any Customer Hub.
Ticketing

**Anonymous Submission Captcha**: This field adds an anti-automation captcha for tickets submitted anonymously. TeamSupport recommends leaving this field enabled.

**Create a ticket**: Here you can turn off the Create Ticket forms.

- **Default Ticket Type**: This controls the default Ticket Type for tickets created on the Customer Support interface.
Hub. You may optionally allow your customers to select Ticket Types from a drop down menu by marking the Ticket Types as “Visible to Customers”. This setup is done in the admin panel.

- **Default Group:** This controls the Ticket Group assigned to the Tickets submitted by your Customers.

- **Enable Contact Additions:** This controls whether an authenticated Hub user has the ability to add additional contacts upon ticket creation. This setting does not apply to users who create tickets anonymously. When enabled, a field is displayed on the New Ticket window which allows the Hub user to include multiple email addresses of contacts whom they wish to be added to the ticket. If the emails are already associated to a contact in your account, the contact will be added to the ticket. If the email address is not already in your account, the contact will be added to **Unknown Company** and also added to the ticket.

- **Group Selection:** This removes the Group selection from the Create Ticket pages.

- **Product Selection:** This removes the Product selection from the Create Ticket pages.

- **Product Version Selection:** This removes the Product Version selection from the Create Ticket pages.
  - **Restrict Product Versions:** This restricts view of Product Versions to only versions associated to the Customers who is logged in.

- **Severity Selection:** This removes the severity selection from the Create Ticket pages. You may allow/disallow the Severity field from being modified by Hub users via the **Severity Modification setting**.

- **My Tickets:** This removes access to the My Ticket page completely from your Customers.

- **Organization Tickets:** This removes access to the organization tickets tab from the My Tickets page.

- **Contact/Product Restriction:** *(Edition: Enterprise Only)* Default is disabled. When enabled, the following will occur when a Contact is logged into the Customer Hub:
  - When submitting new tickets, the Contact will only be able to select Products that are directly related them. If no Products are related to the Contact, they will be able to select Products that are related to the Customer to which the Contact is related.
  - When viewing the list of “Organization Open Tickets”, “Organization Closed Tickets”, and “All Tickets”, the Contact will only be able to view tickets to which they are associated, and tickets that have a Product to which they are related.

### Post Ticket Creation Modifications

- **Ticket Name Modification:** Allows a Hub user the ability to edit the ticket name after ticket creation.
• **Severity Modification**: Allows a Hub user the ability to edit the severity after ticket creation. The Severity field may be hidden from view based on the Severity Selection setting.

• **Custom Field Modification**: Allows a Hub user the ability to edit Custom Fields after ticket creation. Custom Fields must be marked “visible” for them to display on the Customer Hub. Conditional Custom fields are not available for modification on the Customer Hub.
Add a New Hub

Edition: Enterprise

Multiple Customer Hubs are added in the Hub builder which is accessible by clicking the “Add New Hub Button” from Admin -> My Portals -> Customer Hub Settings.

When this link is pressed, the following page will appear.
Field Definitions

- **Hub Prefix/Name**: This is a unique name for the Hub instance. The Hub name must be one alphanumeric word with no special characters. It must also be unique across all TeamSupport customers as the name is included in the default URL.

- **Product Line**: This field is optional. Associating a Product Line to your Customer Hub will allow you to refine the content that your Customers will see.

- **Copy All Other Settings From**: This field allows you to clone an existing Hub. All of the remaining fields will default to the selected Hub. Once created, you can edit any of the fields in your new Hub.

For each of the new Customer Hub that is created with a Product Line, new Email Templates will need to be built and managed. This allows you to further customize the messaging your customer receives. For example, you can include the same customer logos on your Hub and emails.

Click [here](https://example.com) to learn how to configure the Customer Hub.
Changing the Customer Hub URL

Edition: Enterprise

The default URL for your Customer Hub will be a subdomain of the TeamSupport URL.

For example:

The company “Bits & Bytes” might have a default URL of bitsandbytes.na1.teamsupport.com and a Wiki document might route to a URL of bitsandbytes.na1.teamsupport.com/WikiDetail/38657

While you are welcome to use this URL, you may also decide to mask this URL for branding purposes, or to provide a more seamless user experience for your customers. TeamSupport achieves this through using CNAME – which is a method to alias domain names.

For example:

Using CNAME “Bits & Bytes” might have a Landing Page URL of bitsandbytessoftware.co and a Wiki document might route to a URL of bitsandbytessoftware.co/WikiDetail/38657

⭐️ It may take some time to get CNAME fully functional. You may want to consider the lead time when planning your implementation of the Customer Hub.

Steps to change the Customer Hub URL using CNAME

1. You must first own the domain that you would like to use as your alias. Once you own the domain, you will need to establish a subdomain that will be used for your Customer Hub. Your domain registrar should have all of the tools and instructions that you need in order to get your subdomain setup.
2. The next step will be to make your subdomain the alias for your Customer Hub. This is also achieved through the admin tools for your domain registrar. When configuring your CNAME, it will ask the URL to which your subdomain should point. This will be the “Landing Page URL” which can be found by going to Admin -> My Portal -> Customer Hub -> Basic Hub Settings tab -> Primary Hub Settings Section -> “Landing Page URL”. Your registrar should indicate that it may take several days for this mapping to be completed.
3. While you are waiting for the CNAME mapping to complete, you can move on to adding the CNAME URL to your Customer Hub settings. This setting can be found by going to Admin -> My Portal -> Customer Hub -> Basic Hub Settings tab -> Primary Hub Settings Section ->“CNAME Redirect URL”. You will need to put your subdomain URL in this field. If this step is not completed, your subdomain
will not redirect properly.

4. You will need to supply TeamSupport with the SSL certificate (in PFX format) for the CName. The password for the PFX must also be supplied. The certificate can be an export of IIS and must be in PFX format. Here is a link to help change to PFX format if necessary. Note that hosting an SSL certificate is limited to customers on our Enterprise plan. **We strongly advise against using wildcard certificates because of the potential security risks.** We renew SSL Certificates on a once a year basis, so we do request that when finding a source for your SSL Certificate to confirm that your certificate will not need to be renewed in less than a year.
Default Customer Hub Group

When tickets are submitted on the Customer Hub or email, you have the option to define which group the ticket will be associated with. A common group for customer service is usually designated for this but you have the option to select any group you have created.

All members of the default group may get an email telling them that a new ticket has been created. This is a user setting.

This setting can be defined in Admin on the Basic Hub Settings Tab.

Setting the Default Group on a Per Customer Basis

To override the default group on a per customer basis, go to the Customers section, select a customer, then edit Details tab to set the Default Support User and/or Group. When any contact within that customer account submits a ticket, the ticket will be assigned to either the user/group you defined.
Advanced View Designer Tab

If there are edits that you would like to make to your Customer Hub that cannot be handled by the Basic Hub Settings tab, you may be able to edit the HTML directly using the Advanced View Designer tab. We recommend building your Hub on in a Sandbox environment so that you can test offline.

- Page: The upper left hand corner of this page has a drop down menu which allows you to switch between pages in your Customer Hub. We have included all of the default HTML for all of the available pages. Here is an example.
- Code Pane: Depending on the page you have selected, the HTML code will display underneath the page selection on the left hand pane. You can edit the HTML code in these pages as necessary.
- Review Pane: Depending on the page you have selected, a review of the page will display on the right hand pane. If you update the code on the left hand pane, the review pane will update accordingly after changes are saved.
- Save Changes Button: If you choose to update HTML code, you must hit this button. Changes take
place immediately.

- **Revert Button**: If you have made changes to your HTML code, a red revert button will be displayed. Clicking this button will allow you to revert back to factory settings. This change can not be reversed, so please be sure you intend to revert back to factory settings by clicking OK through the confirmation window.
Create Ticket HTML Code

Here is the factory code for the Create Ticket page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<div class="row row-centered">
    <div class="col-xs-12 col-sm-10 col-md-8 col-lg-6 col-centered">
        <div class="panel panel-default accountContainer">
            <div class="panel-body">
                <form id="ticket_form" name="ticketForm" ng-submit="submitNewTicket(ticket)" novalidate>
                    <div class="row" ng-if="!settings.UserInformation.isAuthenticated">
                        <div class="col-md-6 col-sm-6 col-xs-6">
                            <div class="form-group ng-class="{ has-error: ticketForm.AnonymousFullName.$touched && ticketForm.AnonymousFullName.$invalid }">
                                <label>First and Last Name</label>
                                <input type="text" class="form-control" ng-model="ticket.AnonymousContactModel.FullName" name="AnonymousFullName" pattern="\w+ \w+" required>
                                <div class="help-block" ng-messages="ticketForm.AnonymousFullName.$error" ng-if="ticketForm.AnonymousFullName.$touched">
                                    <p ng-message="required">Name is required</p>
                                    <p ng-message="pattern">Enter valid first and last name</p>
                                </div>
                            </div>
                        </div>
                        <div class="col-md-6 col-sm-6 col-xs-6">
                            <div class="form-group ng-class="{ has-error: ticketForm.AnonymousEmail.$touched && ticketForm.AnonymousEmail.$invalid }">
                                <label>Email address</label>
                                <input type="text" class="form-control" ng-model="ticket.AnonymousContactModel.EmailAddress" ng-pattern="/^[^\s@]+@[^\s@]+\.[^\s@]{2,}$/" name="AnonymousEmail" required>
                                <div class="help-block" ng-messages="ticketForm.AnonymousEmail.$error" ng-if="ticketForm.AnonymousEmail.$touched">
                                    <p ng-message="required">Email is required</p>
                                    <p ng-message="pattern">Enter valid email address</p>
                                </div>
                            </div>
                        </div>
                    </div>
                </form>
            </div>
        </div>
    </div>
</div>
```
<p>Email address required</p>
<p>Invalid email address</p>

<div class="form-group" ng-class="{ 'has-error': ticketForm.title.$touched && ticketForm.title.$invalid }">
  <label>Title (Subject)</label>
  <input type="text" class="form-control" ng-model="ticket.TicketName" name="title" required>
  <div class="help-block" ng-messages="ticketForm.title.$error" ng-if="ticketForm.title.$touched">
    <p>Ticket title required</p>
  </div>
</div>

<div class="form-group" style="margin-top:10px;"
  ng-class="{ 'has-error': ticketForm.TicketType.$touched && ticketForm.TicketType.$invalid }"
  ng-if="orgTicketInfo.DropdownCollection[2].DropdownItems.length > 1">
  <label>Ticket Type</label>
  <select name="TicketType" class="form-control" ng-model="ticket.TicketTypeID" ng-options="TicketType.ID as TicketType.Value for TicketType in orgTicketInfo.DropdownCollection[2].DropdownItems" ng-required="orgTicketInfo.DropdownCollection[2].Required">
    <option value="" disabled>"Select a Type</option>
  </select>
</div>
Ticket type required

Product

Select a Product

Version

Select a Version

Product version required
<div class="form-group" style="margin-top:10px;">
  <label>Description</label>
  <summernote height="140" name="description" config="options"></summernote>
</div>

<!-- Screen recording button -->
<div class="screen-recording"></div>

<!-- Video recording button -->
<div class="video-recording"></div>

<!-- File upload area -->
<div class="drop-box" ngf-drag-over-class="dragover" ngf-multiple="true" ngf-allow-dir="true" ngf-max-size="25MB">
  <i class="fa fa-cloud-upload fa-4x" style="color:#3D6DA7"></i><br />
  <label>Drop files here or click to upload</label><br />
  <small>Images can be pasted into the description as well</small><br />
</div>

<ul class="list-group">
  <li class="list-group-item" ng-repeat="f in files">{{f.name}}<a ng-click="deleteFile($index)" class="pull-right"><i class="fa fa-trash"></i></a></li>
</ul>

<div ngf-no-file-drop>File Drag/Drop is not supported for this browser</div>

{{errorMsg}}

</form>

</div>
</div>
</div>

<!-- Suggested Solutions -->
<div class="list-group">
  <h4>Suggested Solutions</h4>
  <a ng-click="ShowDeflection(Result)" class="btn btn-primary" ng-disabled="ticketSubmitting">Submit Ticket</a>
</div>
<div class="modal fade" id="deflectionModal" tabindex="-1" role="dialog" aria-labelledby="deflectionModalLabel">
  <div class="modal-dialog modal-lg" role="document">
    <div class="modal-content">
      <div class="modal-header">
        <button type="button" class="close" data-dismiss="modal" aria-label="Close"><span aria-hidden="true">&times;</span></button>
        <h4 class="modal-title" id="deflectionModalLabel">{{ActiveDeflection.Ticket.Name}}</h4>
      </div>
      <div class="modal-body">
        <div ng-repeat="ArticleBody in ActiveDeflection.ArticleBodies">
          <div ng-bind-html="ArticleBody.Description"></div>
        </div>
      </div>
      <div class="modal-footer">
        <label>Did this resolve your issue?</label>
        <button type="button" class="btn btn-primary" data-dismiss="modal" ng-click="LogAnswer(true)" data-label="Yes">Yes</button>
        <button type="button" class="btn btn-primary" data-dismiss="modal" ng-click="LogAnswer(false)" data-label="No">No</button>
      </div>
    </div>
  </div>
</div>

<modal title="Ticket Submission Confirmation" visible="ticketCreatedSuccess">
  <div>
    Your ticket has been submitted successfully and you will receive a
    email confirmation shortly.
  </div>
  <div style="text-align:right;">
    <button type="submit" class="btn btn-primary" ng-click="closeModal()" data-label="Ok">Ok</button>
  </div>
</modal>

<style>
.drop-box {
  background: #F8F8F8;
  border: 5px dashed #DDD;
  text-align: center;
  margin: 10px 0px 10px 0px;
  border-radius: 5px;
  font-weight: 400;
  padding: 15px;
}
</style>
.dragover {
    border: 5px dashed #3d6da7;
}
md-chips.md-default-theme.md-chips.md-focused, md-chips .md-chips.md-focused {
    border-color: red;
    box-shadow: 0 2px lightgrey;
}
</style>
Custom CSS HTML Code

Here is the factory code for the Custom CSS page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<style>
    /*Site-wide custom css may be placed here*/
</style>
```
Dashboard HTML Code

Here is the factory code for the Dashboard page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<div search></div>
<div class="container-fluid no-gutter">
  <div class="row row-centered no-gutter">
    <div class="dashboard-panel">
      <div class="col-xs-12 col-sm-6 col-md-3 col-lg-3 col-centered" ng-show="showWiki">
        <div class="panel panel-default shadowHover">
          <a href="/Wiki" class="panelLink">
            <div class="hubPanel panel-body">
              <div class="panelLogo" style="color:#2969B0;">
                <i class="fa fa-map-signs fa-4x"></i>
              </div>
              <div class="panelTitleBar">
                <div class="panelTitle">
                  Browse our Wiki
                </div>
              </div>
              <div class="panelContent">
                Learn new tips, tricks, and access helpful documents
              </div>
            </div>
          </a>
        </div>
      </div>
      <div class="col-xs-12 col-sm-6 col-md-3 col-lg-3 col-centered" ng-show="showCommunity">
        <div class="panel panel-default shadowHover">
          <a href="/Community" class="panelLink">
            <div class="hubPanel panel-body">
              <div class="panelLogo" style="color:mediumpurple;">
                <i class="fa fa-users fa-4x"></i>
              </div>
              <div class="panelTitleBar">
                <div class="panelTitle">
                  Community
                </div>
              </div>
              <div class="panelContent">
                Browse information from other users in a forum style.
              </div>
            </div>
          </a>
        </div>
      </div>
    </div>
  </div>
</div>
```
Footer HTML Code

Here is the factory code for the Footer page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<div class="footer">
  <p class="text-muted text-center">
    <a href="/tandc">Terms & Conditions</a>  <!--|-->
    <a href="#">Privacy Policy</a>  <!--|-->
  </p>
</div>
```
Header HTML Code

Here is the factory code for the Header page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<nav ng-controller="accountController" class="navbar navbar-default">
  <div class="container-fluid">
    <div class="navbar-header">
      <button type="button" class="navbar-toggle collapsed" data-toggle="collapse" data-target="#bs-example-navbar-collapse-1" aria-expanded="false">
        <span class="sr-only">Toggle navigation</span>
        <span class="icon-bar"></span>
        <span class="icon-bar"></span>
        <span class="icon-bar"></span>
      </button>
      <a class="navbar-brand" style="padding:0px;" href="/dashboard">
        <img class="companyLogo" ng-if="settings.HubLogoURL" src="{{settings.HubLogoURL}}" />
      </a>
    </div>
    <div class="collapse navbar-collapse" id="bs-example-navbar-collapse-1">
      <ul class="nav navbar-nav">
        <li ng-show="showKB">
          <a href="/knowledgeBase">Knowledge Base</a>
        </li>
        <li ng-show="showWiki">
          <a href="/Wiki">Wiki</a>
        </li>
        <li ng-show="showMyTickets">
          <a href="/mytickets">Tickets</a>
        </li>
      </ul>
      <ul class="nav navbar-nav navbar-right">
        <li>
          <div searchsmall></div>
        </li>
          <a href="/createticket">Submit a Ticket</a>
        </li>
      </ul>
    </div>
  </div>
</nav>
```
# Knowledge Base HTML Code

Here is the factory code for the Knowledge Base page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as [DiffNow](#).

```html
<div id="form-views" ui-view>
  <div ncy-breadcrumb></div>
  <div class="row row-centered">
    <div class="col-sm-12" ng-repeat="Category in KnowledgeBaseCategories">
      <div class="col-xs-12 col-sm-11 col-md-10 col-lg-9 col-centered">
        <div class="panel panel-default" style="padding: 0px 15px 15px 15px;">
          <h2 class="MainCategoryName text-center">
            <a href="/knowledgeBase/category/{{Category.CategoryID}}">{{Category.CategoryName}}</a>
          </h2>
          <div class="row SubCategorySection">
            <div class="col-sm-6" ng-repeat="SubCategory in Category.SubCategories">
              <h5 class="CategoryName">
                <a href="/knowledgeBase/category/{{Category.CategoryID}}/subcategory/{{SubCategory.CategoryID}}">{{SubCategory.CategoryName}} ({{SubCategory.Articles.length}})</a>
              </h5>
              <a href="/knowledgeBase/{{Article.ArticleID}}" class="center-block articleName" ng-repeat="Article in SubCategory.Articles | limitTo:limit" ng-bind-html="Article.ArticleName"></a>
              <div ng-if="SubCategory.Articles.length > limit" style="margin-top:6px;">
                <a href="/knowledgeBase/category/{{Category.CategoryID}}/subcategory/{{SubCategory.CategoryID}}">View More<i class="fa fa-hand-o-right"></i></a>
              </div>
            </div>
            <div class="col-sm-6" ng-if="Category.Articles.length > 0">
              <a href="/knowledgeBase/{{Article.ArticleID}}" class="center-block articleName" ng-repeat="Article in Category.Articles" ng-bind-html="Article.ArticleName"></a>
            </div>
          </div>
        </div>
      </div>
    </div>
  </div>
</div>
```
Knowledge Base Article HTML Code

Here is the factory code for the Knowledge Base Article page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<div ncy-breadcrumb></div>
<div class="container-fluid" style="background-color:white;">
  <div class="col-lg-10 col-md-10 col-lg-offset-1 col-md-offset-1 col-sm-offset-1" ng-show="!Unauthorized">
    <div class="row">
      <div class="col-lg-10 col-md-10 col-lg-offset-1 col-md-offset-1 col-sm-offset-1" ng-show="!Unauthorized">
        <h1 class="text-center" ng-bind-html="KB.Article.Name"></h1>
      </div>
    </div>
    <div class="row" style="margin-top:30px;">
      <div ng-repeat="ArticleBodyModel in KB.ArticleBodies" style="margin-bottom:20px;">
        <div ng-repeat="ArticleBody in ArticleBodyModel">
          <div ng-bind-html="ArticleBody.Description"></div>
        </div>
        <div ng-repeat="Attachment in ArticleBodyModel.Attachments" style="padding-top:4px;">
          <a ng-click="downloadKBAttachment(Attachment)"
             style="text-decoration: none;"
            >
            <i class="fa fa-paperclip"></i>{{Attachment.FileName}}</a>
        </div>
      </div>
    </div>
  </div>
</div>
<div ng-repeat="Attachment in KB.AttachmentModel">
  <div ng-bind-html="Attachment.Description"></div>
  <div ng-repeat="Attachment in KB.AttachmentModel.Attachments" style="padding-top:4px;">
    <a ng-click="downloadKBAttachment(Attachment)"
       style="text-decoration: none;"
      >
      <i class="fa fa-paperclip"></i>{{Attachment.FileName}}</a>
  </div>
</div>
<div style="border-top: lightgrey solid 1px; padding-top:20px; margin-bottom:20px;">
  <div style="display:inline; padding-top:20px;">
    <i ng-click="displayRatingModal(true)"
       ng-class="{'thumbsUp' : KB.KBRating.Rating == true }">
      fa fa-thumbs-up fa-2x"
    </i>
  </div>
  <div style="display:inline; margin-left:10px;">
    <i ng-click="displayRatingModal(false)"
       ng-class="{'thumbsDown' : KB.KBRating.Rating == false }">
      fa fa-thumbs-down fa-2x"
    </i>
  </div>
  <div ng-if="KB.KBRating.Comment">
    <i ng-click="displayRatingModal(true)"
       ng-class="{'thumbsUp' : KB.KBRating.Rating == true }">
      fa fa-thumbs-up fa-2x"
    </i>
    <i ng-click="displayRatingModal(false)"
       ng-class="{'thumbsDown' : KB.KBRating.Rating == false }">
      fa fa-thumbs-down fa-2x"
    </i>
  </div>
</div>
<div ng-if="KB.KBRating.Comment">
  <i ng-click="displayRatingModal(true)"
     ng-class="{'thumbsUp' : KB.KBRating.Rating == true }">
    fa fa-thumbs-up fa-2x"
  </i>
  <i ng-click="displayRatingModal(false)"
     ng-class="{'thumbsDown' : KB.KBRating.Rating == false }">
    fa fa-thumbs-down fa-2x"
  </i>
</div>
```

arg-in-bottom:20px;">
  My Comments:
  <textarea class="form-control" ng-model="KB.KBRating.Comment" disabled="true" style="width:480px;"></textarea>
</div>
  <div style="margin-top:30px; border-top: lightgrey solid 1px; padding-top:20px; margin-bottom:20px;" ng-show="KB.ArticleRating > 0">
    <div style="display:inline; padding-top:20px;">{{KB.ArticleRating}}% of voters found this helpful</div>
  </div>
</div>

  </div>
  <div style="margin-top:30px; border-top: solid 1px; padding-top:20px; margin-bottom:20px;" ng-show="Unauthorized" class="text-center">
    <label>You are not authorized to view this Knowledge Base Article.</label>
  </div>
</div>

  <modal title="Add/Edit a Rating" visible="showRatingModal">
    <form name="ratingForm" ng-submit="rateKBArticle(clientComment)" class="container-fluid" style="margin:10px;">
      <div class="row">
        <div style="display:inline;">Was this article helpful to you?</div>
        <div style="display:inline; margin-left:10px;">
          <i ng-click="KB.KBRating.Rating = true;" ng-class="{'thumbsUp' : KB.KBRating.Rating == true }" class="fa fa-thumbs-up fa-2x"></i>
        </div>
        <div style="display:inline; margin-left:10px;">
          <i ng-click="KB.KBRating.Rating = false;" ng-class="{'thumbsDown' : KB.KBRating.Rating == false }" class="fa fa-thumbs-down fa-2x"></i>
        </div>
      </div>
      <div class="row" style="margin-top:20px;">
        My Comments:
        <textarea class="form-control" ng-model="clientComment" style="min-height:100px;"></textarea>
      </div>
      <div class="row" style="text-align:right; margin-top:20px;">
        <input type="button" class="btn btn-danger" ng-click="resetRating()" value="Cancel">
        <button type="submit" class="btn btn-primary" ng-disabled="newContactForm.$invalid || commentSubmitting">Submit</button>
      </div>
    </form>
  </modal>
.thumbsDown {
  color: red;
}

</style>
My Tickets HTML Code

Here is the factory code for the My Tickets page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<nyc-breadcrumb></nyc-breadcrumb>
<ui-view>
  <div class="row">
    <div class="col-md-12">
      <div class="panel panel-default">
        <div class="panel-heading">
          <div class="row">
            <div class="col-sm-9">
              <ul class="nav nav-pills">
                <li role="presentation" ng-class="{ 'active': MyOpenTicketsTabActive }"><a ng-click="getMyOpenTickets()">My Open Tickets</a></li>
                <li role="presentation" ng-class="{ 'active': MyClosedTicketsTabActive }"><a ng-click="getMyClosedTickets()">My Closed Tickets</a></li>
                <li role="presentation" ng-class="{ 'active': OrgOpenTicketsTabActive }"><a ng-click="getOrgOpenTickets()" ng-show="settings.Features.EnableOrganizationTickets & ShowOrgticketsTab & (!UserInfo.portalLimitOrgTickets)">Organization Open Tickets</a></li>
                <li role="presentation" ng-class="{ 'active': OrgClosedTicketsTabActive }"><a ng-click="getOrgClosedTickets()" ng-show="settings.Features.EnableOrganizationTickets & ShowOrgticketsTab & (!UserInfo.portalLimitOrgTickets)">Organization Closed Tickets</a></li>
                <li role="presentation" ng-class="{ 'active': AllTicketsTabActive }"><a ng-click="getAllTickets()" ng-show="settings.Features.EnableOrganizationTickets & ShowOrgticketsTab & (!UserInfo.portalLimitOrgTickets)">All Tickets</a></li>
                <!--li role="presentation" ng-class="{ 'active': MyTicketsTabActive }"><a ng-click="getMyTickets()">My Open Tickets</a></li>
                <li role="presentation" ng-class="{ 'active': OrgTicketsTabActive }"><a ng-click="getOrgTickets()" ng-show="settings.Features.EnableOrganizationTickets & ShowOrgticketsTab & (!UserInfo.portalLimitOrgTickets)">Organization Open Tickets</a></li>
                <li role="presentation" ng-class="{ 'active': ClosedTicketsTabActive }"><a ng-click="getAllClosedTickets()">All Closed Tickets</a></li-->
              </ul>
            </div>
            <div class="col-sm-3 pull-right">
              <form role="search" method="get" action="/tbl">
                <input type="text" name="criteria" class="form-control" ng-model="search" value="" placeholder="Search " />
              </form>
            </div>
          </div>
        </div>
        <!--div class="col-sm-3 pull-right">
        <form role="search" method="get" action="/tbl">
          <input type="text" name="criteria" class="form-control" ng-model="search" value="" placeholder="Search " />
        </form>
        </div-->
      </div>
    </div>
  </div>
</ui-view>
</div>


```
<div class="panel-body">
<table class="table table-striped table-hover">
<thead>
<tr ng-repeat="Column in Columns">
<td ng-click="sortColumn(Column.FieldText)" class="padFix">
<a ng-click="sortColumn(Column.FieldText)" class="padFix" ng-if="!(key.indexOf('hidden') &gt; -1)">
{{Column.FieldText}}</a>
</td>
</tr>
</thead>
<tbody>
<tr ng-repeat="ticket in MyTicketData | orderBy:orderBy:reverseSort | filter:search" ng-click="loadTicket(ticket.hiddenTicketNumber)" ng-if="!(key.indexOf('hidden') &gt; -1)">
<td ng-repeat="(key,prop) in ticket track by key" class="padFix" ng-if="!(key.indexOf('hidden') &gt; -1)">

{{prop}}</td>
</tr>
</tbody>
</table>
</div>

<style>
.table { font-size:14px; }
</style>
Search HTML Code

Here is the factory code for the Search page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<ncy-breadcrumb></ncy-breadcrumb>
<div class="row">
  <div class="col-md-3 col-md-offset-3" ng-show="showKB">
    <h3>Knowledge Base</h3>
    <ul class="list-unstyled">
      <li class="result-item" ng-repeat="KB in KBSearchResults | limitTo: 15 | orderBy:'-HitRating'">
        <a href="/knowledgeBase/{{KB.Article.TicketID}}">{{KB.Article.Name}}  <span ng-if="KB.VoteRating" class="badge fa fa-thumbs-up">  {{KB.VoteRating}}</span></a>
        <p class="text-muted">Created by {{KB.Article.CreatorName}} <em>{{KB.Article.DateModified | date:'MM/dd/yyyy'}}</em></p><br />
      </li>
      <li class="result-item" ng-show="!(KBSearchResults.length > 0)">
        <label>No Results</label>
      </li>
    </ul>
  </div>
  <div class="col-md-3" ng-show="showWiki">
    <h3>Wiki</h3>
    <ul class="list-unstyled">
      <li class="result-item" ng-repeat="Wiki in WikiSearchResults | limitTo: 15 | orderBy:'-HitRating'">
        <a href="/WikiDetail/{{Wiki.Article.ArticleID}}">{{Wiki.Article.Articlename}}</a>
        <p class="text-muted">Created by {{Wiki.Article.Creator}} <em>{{Wiki.Article.ModifiedDate | date:'MM/dd/yyyy'}}</em></p>
      </li>
      <li class="result-item" ng-show="NoWikiResults">
        <label>No Results</label>
      </li>
    </ul>
  </div>
</div>
<style>
  .result-item:first-child {
    border-top: 1px solid #ddd;
  }
  .result-item {
    border: 1px solid #ddd;
    padding: 20px 20px 20px 20px;
    background-color:white;
  }
</style>
```
Search Panel HTML Code

Here is the factory code for the Search Panel page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<form ng-submit="getSearchResults(SearchText)" ng-controller="searchController" class="search-container">
  <div class="container">
    <div class="row">
      <div class="col-lg-8 col-lg-offset-2 col-md-8 col-md-offset-2 col-sm-offset-2 col-sm-8 col-xs-12">
        <div class="inputContainer" style="position:relative;">
          <i ng-click="getSearchResults(SearchText)" class="fa fa-search fa-2x" style="position:absolute; right:14px; top:14px; opacity:.4"></i>
          <input class="search-control form-control" type="text" ng-model="SearchText" placeholder="Search">
        </div>
      </div>
    </div>
  </div>
</form>
```
Terms and Conditions HTML Code

Here is the factory code for the Terms and Conditions page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<div ng-if="UserInfo.approvedTermsAndConditions || !UserInfo.isAuthenticated">
  <ncy-breadcrumb></ncy-breadcrumb>
</div>
<div class="container">
  <div class="row">
    <div class="col-md-8 col-md-offset-2">
      <form name="tandc" ng-submit="approveTandC()">
        <div class="panel panel-default" style="margin-top:20px;">
          <div class="panel-body" style="max-height:600px; overflow-y:scroll; background-color:white;">
            <div style="text-align:center;">
              <h1>Terms and Conditions</h1>
              <p>This is where your terms and conditions content will go.</p>
            </div>
          </div>
        </form>
      </div>
    </div>
  </div>
</div>
```

Here is the factory code for the Access Detail page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<ncy-breadcrumb/>
<div class="col-xs-12 col-sm-3 col-md-3 col-lg-3">
  <div class="well well-sm ticket-fields">
    <div>
      <label>Name</label><br />
      <p>{{(Ticket.Ticket.Name) || "-" }}</p>
    </div>
    <div>
      <label>Number</label><br />
      <p>{{(Ticket.Ticket.TicketNumber) || "-" }}</p>
    </div>
    <div>
      <label>Type</label><br />
      <p>{{(Ticket.Ticket.TicketTypeName) || "-" }}</p>
    </div>
    <div>
      <label>Status</label><br />
      <p>{{(Ticket.Ticket.Status) || "-" }}</p>
    </div>
    <div>
      <label>Severity</label><br />
      <p>{{(Ticket.Ticket.Severity) || "-" }}</p>
    </div>
    <div ng-show="settings.Features.EnableTicketGroupSelection">
      <label>Group</label><br />
      <p>{{(Ticket.Ticket.GroupName) || "-" }}</p>
    </div>
    <div ng-show="settings.Features.EnableTicketProductSelection">
      <label>Product</label><br />
      <p>{{(Ticket.Ticket.ProductName) || "-" }}</p>
    </div>
    <div ng-show="settings.Features.EnableTicketProductVersionSelection">
      <label>Version</label><br />
      <p>{{(Ticket.Ticket.ReportedVersion) || "-" }}</p>
    </div>
    <div>
      <label>Assigned To</label><br />
      <p>{{(Ticket.Ticket.UserName) || "-" }}</p>
    </div>
    <div>
      <label>Contacts</label><i class="fa fa-plus-circle" ng-click="toggleContactModal()"></i>
    </div>
  </div>
</div>
```
<div class="row">
    <div screen-recording></div>
</div>

<div class="row">
    <div video-recording></div>
</div>

<div class="row">
    <div class="col-sm-12">
        <div ngf-drop="addFiles($files)" ngf-select="addFiles($files)"
            class="drop-box" ngf-drag-over-class="'dragover'" ngf-multiple="true"
            ngf-allow-dir="true" ngf-max-size="20MB">
            <i class="fa fa-cloud-upload fa-4x" style="color:#3D6DA7"></i><br />
            <label>Drop files here or click to upload</label><br />
            <small>Images can be pasted into the description as well</small><br />
        </div>
        <ul class="list-group">
            <li class="list-group-item" ng-repeat="f in files">{{f.name}}<a ng-click="deleteFile($index)" class="pull-right"><i class="fa fa-trash"></i></a></li>
        </ul>
        <div ngf-no-file-drop>File Drag/Drop is not supported for this browser</div>
        {{errorMsg}}
    </div>
</div>

<div style="text-align:right;" class="btn btn-primary" ng-disabled="commentSubmitting">Submit</div>
</form>

<modal title="Add a contact" id="addContact" visible="showContactModal">
    <form name="newContactForm" role="actionForm" ng-submit="AddNewContact(AnonymousContactModel)">
        <div class="col-md-6 col-sm-6 col-xs-6">
            <div class="form-group ng-class={ 'has-error': newContactForm.FullName.$touched && newContactForm.FullName.$invalid }">
                <label>First and Last Name</label>
                <input type="text" class="form-control" ng-model="AnonymousContactModel.FullName" name="FullName" pattern="\w+ \w+" required>
                <div class="help-block ng-messages="newContactForm.FullName.$error" ng-if="newContactForm.FullName.$touched">
                    <p ng-message="required">Name is required</p>
                    <p ng-message="pattern">Enter valid first and last name</p>
                </div>
            </div>
        </div>
        <div class="col-md-6 col-sm-6 col-xs-6">
            <p ng-message="required">Name is required</p>
            <p ng-message="pattern">Enter valid first and last name</p>
        </div>
    </form>
</modal>
Wiki HTML Code

Here is the factory code for the Wiki page for the Customer Hub. If you would like to use this code on your page, you can hit the red “Revert” button on your page. If you do not see the “Revert” button, that means your code is up to date.

If you have customized your code and would like to compare it with the factory code below, we recommend using a text compare tool such as DiffNow.

```html
<div ng-if="WikiArticles.length > 0">
  <div class="row">
    <div class="col-xs-12 col-sm-3 sidebar">
      <ul class="nav nav-sidebar">
        <li ng-class="{"active": $first}" ng-repeat="Wiki in WikiArticles" ng-include="'categoryTree'"></li>
      </ul>
    </div>
    <div class="col-xs-12 col-sm-9">
      <div class="wiki-container">
        <h1 class="wiki-title">{{CurrentArticle(ArticleName)}}</h1>
        <div ng-if="CurrentArticle !== null" ng-bind-html="CurrentArticle.Body"></div>
        <div ng-if="CurrentArticle == null">You do not have access to this wiki. Please contact your administrator for further information.</div>
      </div>
    </div>
  </div>
</div>

<script type="text/ng-template" id="categoryTree">
  <a ng-click="loadArticle(Wiki(Article(ArticleID, $event))">{{Wiki(Article(ArticleName))}}</a>
  <ul class="nav sub-nav" ng-if="Wiki(SubArticles.length">
    <li ng-repeat="Wiki in Wiki.SubArticles" ng-include="'categoryTree'"></li>
  </ul>
</script>

<style>
  .sidebar {
    overflow-x: hidden;
    overflow-y: auto;
    background-color: #f3f3f4;
    border-right: 1px solid #e7e7e7;
  }

  /* Sidebar navigation */
  .nav-sidebar {
    margin-right: -21px;
    margin-bottom: 20px;
  }
</style>
```
Granting Access to Customer Hub

There are four ways for your customers to gain access to your Customer Hub. Please browse the topics below to learn more about each method.

- **Manually give access through the Customer section**
- **Allow your customers to Self Register OR Request Access**
- **Single Sign On (SSO)**
Manually Granting Access to Customer Hub

You may grant any Customer and/or Contact access to the Customer Hub manually through the Customer section within TeamSupport. One use case for this method is if you manually enter new Contacts into your system and will need to individually choose whether or not each Contact should have Hub access. Another use case might be if a new Contact reaches out to you via email, and you would like to give them access to your Customer Hub. [View this page for other methods of granting access to the Customer Hub](#).

1. Navigate to the **Customer** section.
2. Click on the Customer you would like to grant access.

3. Click on the **Edit Organization** link.
4. Set Portal Access to “true”
5. Click **Save**

At this point, the Company has been granted access to your Customer Hub.

Now you can determine which contacts within this company can log in to your Customer Hub. To do this, follow these steps:

1. While still under the Customer section, click the **Contacts** tab, select the contact of interest and click the **Edit** link.
2. Set Portal User to “true”.
3. If you would like to send the Contact a password, click the button labeled “Send Password” and choose “Customer Hub”. This will email the contact a temporary password and a link to your Customer Hub. Once they log in, they will be required to create a new password. Please note that if you are using SSO (Single Sign On), you do not need to issue passwords to your contacts.
4. Click **Save**.
<table>
<thead>
<tr>
<th>Overview</th>
<th>Active</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal User</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Portal View Only</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>
Self Registration and Request Access on Customer Hub

Auto Register and Request Access are two methods you elect to enable on your Customer Hub. Auto Register allows your Customers to automatically gain access to your Hub immediately by supplying their username and password. You may choose not to have this option if you are concerned about non-customers gaining access to your Customer Hub. Alternatively, Request Access allows your Customers to visit your Customer Hub and ask to be granted access in the form of a ticket. This allows you to verify the Customer before they gain access to your Hub. This method does require some manual intervention and is not automatic.

When your Customers visit your Hub login, they will be presented with the following:

Request Access

To enable Request Access, go to Admin->My Portal->Customer Hub Settings->Hub Access Control->User Account Creation-> “Request Access”. The default Ticket Types and Groups will be selected. You may change these to make these requests more obvious in your system. For example, if you would like one person to validate and grant access to Customers, you can put these requests into their own Group and/or
their own Ticket Type by default.

If Request Access is enabled, your Customer will be presented with the following window:

Once they out this for in and click “Register Me!”, a ticket will be created for their request. We will also create a new Contact in your database and link them to _Unknown Company by default. If this is a duplicate contact, you may Merge Contacts. You may also simply update their Company record so that they are in the correct organization.

If you would like to grant this Contact access to the Hub, follow the instructions for Manually Granting your Customers Access to Customer Hub.
Self Registration

To enable Self Registration, go to Admin->My Portal->Customer Hub Settings->Hub Access Control->User Account Creation-> “Self Registration”.

If Self Registration is enabled, your Customer will be presented with the following window:

![Self Registration Form](image)

After filling out the form, they will be automatically granted access to the Hub to submit tickets, view Knowledgebase Articles, etc. We will also create a new Contact in your database and link them to _Unknown Company_ by default. If this is a duplicate contact, you may Merge Contacts. You may also simply update their Company record so that they are in the correct organization.
TeamSupport

Customer Support Software Documentation - 1

SSO (Single Sign On) with Customer Hub
You have the option for your TeamSupport Customer Hub to require a user to log in with a username and
password. While this works fine for some TeamSupport customers, requiring a password creates a problem
if the Customer Hub is being accessed from within another application which already has authentication.
Two examples of this would be if you would like to put a link to the Customer Hub from within your
application, or from within a portal that you already provide to your customers for your own product.
In these cases, you can use Single Sign On which allows you to generate and pass an authentication token
to the Customer Hub which will provide the credentials needed to automatically log the customer into the
Customer Hub without further login requirements. You will need to follow the 3 steps outlined on this page.

*

Please contact TeamSupport for the GUID that is referenced in this SSO setup.

Step 1: Generating an “authtoken” encrypted value
To generate the authtoken you will need to combine the users email and your GUID along with AES
encryption.
Below are examples of creating the encrypted authtoken.
Javascript example: If you do not want the encryption method exposed to users with javascript you can run
the code server side and pass just the encrypted string to the front end.
<script src="https://app.teamsupport.com/frontend/library/aes.js"></script>
<script type="text/javascript">
var encrypted = CryptoJS.AES.encrypt(Date.now() + ",{users email}",
"{GUID}");
</script>
PHP example:
$microtime = microtime();
$comps = explode(' ', $microtime);
// Note: Using a string here to prevent loss of precision
// in case of "overflow" (PHP converts it to a double)
$milliseconds = sprintf('%d%03d', $comps[1], $comps[0] * 1000);
$data_to_encrypt = $milliseconds . ",{users email}";
$passphrase = {GUID};
$salt = openssl_random_pseudo_bytes(8);
$salted = '';
$dx = '';
while (strlen($salted) < 48) {
$dx = md5($dx.$passphrase.$salt, true);
Page 406 of 627


Step 2: Generating URL for “Login Button”

You will need to replace [YourCustomerHubURL] – including the brackets – with your Customer Hub Landing Page URL which can be found under Admin->My Portal->Customer Hub->Basic Settings, and replace [encryptedAuthToken] – including the brackets – with your authentication token from Step 1 above. The URL behind your “login button” will look something like this:

https://[YourCustomerHubURL]/sso/[encryptedAuthToken]

You may also redirect to a specific page by including an optional redirect parameter:

https://[YourCustomerHubURL]/sso/[encryptedAuthToken]?redirect=http://example.com

Step 3: Giving Customer and Contact access through the settings in the Customer section of TeamSupport

Before anyone can access your Customer Hub, you need to allow Hub access to BOTH the company and the contacts within the company.

Note – Since you are using the single sign on method as described above, you do not need to send the Customer Hub user a password.

A few notes about giving your Customers access:

- If you are a new customer of TeamSupport and you have not yet imported your Customers into TeamSupport, we advise that you set this value with your import as this will save you a lot of work. For example, if you are pulling your Customers in through our Salesforce Integration, you can mark each new Customer to have Hub access upon import. Likewise, you can include the “Portal access” and “Portal user” fields in your Customer and Contact tables as part of the import.
• If you would like to give all of your Customers and Contacts access to your Customer Hub, we have a utility to perform this task. This is “all or nothing”, meaning, we can not segment your Customer list in any way with this utility. Please contact TeamSupport with this request.

• If your Customers are already populated inside of TeamSupport, and you do not wish to give all of your Customers access to the Customer Hub, you may turn on access to each Company/Contact manually. Please keep in mind that you do not need to issue your customer passwords for this method. Click here to learn how to give Hub access manually.

• By default, customers have access to change their passwords in the Customer Hub. We recommend removing this link to changing their password. You can do this by adding the following html code to your Custom CSS page in the Advanced View Designer for the Customer Hub.

  .change-password{display:none}
Suggested Solutions on Customer Hub

In an effort to reduce the number of tickets your customers send your way, you can use Knowledge Base Tickets and Tagging to display suggested articles to your customers in hopes they will find the answer to their question before actually submitting a ticket or connecting with your team over Chat. Suggestions are displayed during:

- **Ticket Creation**: Articles are suggested to customers during ticket creation on the Customer Hub. Suggestions will be made to authenticated and anonymous Customer Hub users.
- **Ticket Confirmation Email**: This feature is optional. The “New Ticket Confirmation – Advanced Portal” email template is used to send suggested solutions to authenticated customers who submitted a ticket via the Customer Hub.
- **Customer Chat**: This feature is optional. Articles will be suggested to customers on the initial Customer Chat screen before the chat is actually initiated.

Setup

Step One

Required for suggestions during Ticket Creation on Hub, Ticket Confirmation Email, Customer Chat

The first step is to configure the Knowledge Base article correctly. You can create new KB tickets or use existing ones. Several items are required:

1. On the ticket:

   Upgrade to V2

   10/30/2018

   Kimberly Cook
   Description added on 10/30/2018 2:41 PM

   Upgrading to V2 requires a hardware upgrade. Please contact our Support Department for more information.

   Assigned: Kimberly Cook
   Type: KB
   Group: Dev
   Status: In Progress
   Severity: Immediate Attention
   Visible: ✔️
   KB: ✔️
   Category: unassigned
   Add Tag
   x upgrade
1. Visible (to customers) should be checked
   a. Knowledge Base should be checked
   c. One or more keyword tags should be added to the ticket. These tags will be matched with words used by your customers, and the matched articles will be suggested to them.

2. On the action inside of the ticket:
   a. KB should be selected
   b. The action should be marked Public

---

**Step Two**

**Required for Ticket Confirmation Email and Customer Chat**

The following settings must be enabled in your My Portal settings.

**Anonymous Access Settings**

- Anonymous Hub Access
- Anonymous Chat
- Anonymous Knowledge Base
- Anonymous Products
- Anonymous Ticketing
- Anonymous Wiki

---

**Step Three**

**Required for Ticket Confirmation Email**

To display article suggestions via the Ticket Confirmation Email, you must insert the placeholder `{{Deflector title="insert title text here"}}` in the “New Ticket Confirmation – Advanced Portal” email template. You may customize your title by changing the text inside the quotations.

This placeholder is not available for the email template that is used to automatically respond to tickets submitted via email. Additionally, articles will only be suggested to customers who are logged in to the Customer Hub. Suggestions are not made to users who submit tickets anonymously; even if they are a portal user in your system.
Step Four

Required for **Customer Chat**

The option “Enable Ticket Deflection” is found under [Customer Chat Settings](#) in the Admin panel.

Additionally, [Customer Specific Articles](#) must be disabled in the Admin panel.
How Suggested Solutions are Displayed

Upon Ticket Creation on the Customer Hub

Articles will be displayed under the title “Suggested Solutions”. The keyword Tags on the articles are matched to the words typed into the Ticket Description.
Ticket Confirmation Email

Articles will be displayed in the email that have Ticket Tags that match the keywords that customers have typed in their Ticket Description box. They will be listed under the title you have defined into the placeholder value.
Customer Chat

The initial Customer Chat window that is available to the customer contains a box that allows the customer to type their initial question. Articles will be displayed that have Ticket Tags that match the keywords that customers have typed in their Chat question box.

Welcome to our live chat!

Amy
Waters
email@company.com

How do you upgrade to v2?

⚠️ Would one of these articles help you?

Upgrade to V2

SUBMIT
Viewing Articles

In all cases, when your customers may click the suggested topic, they will be taken to the actual article where they will have a chance to indicate whether or not the article was helpful. This information is stored in the “Ticket Deflections” report as described below.

Measuring Success for Tickets Deflected from Customer Hub

TeamSupport tracks how effective the Ticket Deflections have been in the “Ticket Deflection Report” in the Reports section. This will show each time a user clicks on a suggested ticket presented by Ticket Deflection initiated by ticket creation on the Customer Hub, and will log if that ticket was used by the user or not.
Knowledge Base Settings

You can configure all of your categories and subcategories within TeamSupport under Admin -> My Portal -> Knowledgebase Tab.

* Drag and drop categories to reorder them as they appear in the community.
Community Settings

You may choose to enable Community (or what some call forums) on your Customer Hub at no additional cost and let your customers help each other, and also converse with your team.

Note: Some customers may want to create a new ticket type called Community or Forum (your choice) but it is not needed and also a Group called Community. Any ticket type can be designated to the Community as can any Group. To learn how to customize your Ticket Types, see [here](#). See more about Groups [here](#).

**Enable Community** by going to Admin/My Portal/Community tab. Check the Enable box at the top and click Save. **Refresh your browser** and you will see a new Community section appear on the left navigation under Knowledge Base. This is where all of your forum posts will appear. If you are using the Customer Hub, you will also need to visit Admin->My Portal->Customer Hub to enable Community on the Hub as well.

**Add a Category, then add your Sub Categories.** The Sub Category is where the discussion happens. These Sub Categories are "tickets" within your main account, but to your customers, they appear in the community (forum) format. This makes it easy for your team to manage the exchanges.

Click New Category or New Sub Category. In the pictures below, you can see how to define what ticket type you want to be created when a customer creates a new Topic on the Community. Again, you can choose to
create a ticket type called Community, Form, etc – or you can tie these to types you already have. See [here](#) to learn more about ticket types.

You can also define a default group to assign these too as well as a product and product line (Enterprise only on the Products selection).

<table>
<thead>
<tr>
<th>Properties</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Delete this category and all its subcategories</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Name</strong></td>
<td>New Parent Category</td>
</tr>
<tr>
<td>The name of the category to appear in the community.</td>
<td></td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Product Line</strong></td>
<td>Unassigned</td>
</tr>
<tr>
<td>The product line this category will be associated with (dictates which customer hub this will be viewable on).</td>
<td></td>
</tr>
</tbody>
</table>

[Save Category](#)
Click [here](#) to learn how to create and manage Community posts from within TeamSupport.

You can see how your customers will use Community in our usage guides for the [Customer Hub](#).
Custom Grid Columns

Along with many other types of customization, TeamSupport allows you to select which columns will be displayed to your customers on their Ticket Grids on the Customer Hub.

On new accounts, a default set of columns are selected. To edit this list, go to Admin->My Portal->Custom Grid Columns.

Customizing Grid Columns

- **Reorder columns**: Drag and drop columns to reorder them.
- **Add columns**: Select a column from the list and click “Add”. Custom fields are available to display.
- **Remove columns**: Hover over a column that is in the list and trash can will appear. Click “OK” on the confirmation window.

Click [here](#) to learn more ways to customize your Hub.
The Custom Fields section allows you to create fields unique to your organization for Tickets, Users, Products, Product Versions, Product Line, Inventory Assets, Customers, Customer Products, and Customer Contacts. Each of these different areas in the application can have as many different custom fields as you need.

Quick Tip: Custom fields can be found in our Reporting section, which means you can use these fields for analyzing your data. You can also build Ticket Automation triggers with custom fields which gives you the power to automatically take action on tickets based on values that are selected in a custom field. You may also set custom field values based on other ticket conditions through Ticket Automation.

To add/edit custom fields, go to Admin -> Custom Fields tab.

First, make a selection from the “Field Type” pulldown. If you select Tickets, a second pulldown for Ticket Type will appear. To add a category, click “Add Category”. Depending on your table selection, you may have Product Line as an option. If you select a Product Line for your category, only users who have rights to the Product Line will be able to see Custom Fields within that category. You can always rearrange the custom fields into categories by dragging and dropping. You can create an unlimited number of custom fields per category and Ticket Type. This means that each separate ticket type can have custom fields which best capture the information required for that particular type.

To add a custom field click “Add Custom Field”. To edit an existing custom field, hover over the name then click the pencil icon next to the name that will appear.
The following form will appear:

**Custom Field**

**Name:**
Billable?

**API Field Name:**
Billable

**Parent Field:**
Unassigned

**Parent Product:**
Unassigned

**Field Type:**
Pick List

**Pick List Values:**
(Required at Closing)
Yes
No

- The first value is not a valid selection for a required field.
- A value is required
- A value is required prior to closing ticket

**Description:**

- Visible on Portal

[Save] [Cancel]
Field Definitions

Please note that not all options below will be available based on the Field Type selection

- **Name**: Required. This will be the name of the field displayed to the user/customer entering data in the user interface and/or Customer Hub.
- **API Field Name**: The name used for our API. This will be auto-filled after you click save.
- **Parent Field/Parent Product**: For Ticket Custom Fields, you can setup a tree of conditional custom fields using the parent field.
- **Field Type**: Required. The Property Type field has 5 possible options:
  - **Text**: This is used when you simply want a place to enter additional text information with no restrictions unless an input mask is specified. See Input Mask description below.
  - **Number**: This will only allow numbers to be entered.
  - **Pick List**: When you select Pick List you will get an additional field in the dialog named “Pick List Values”. You can enter the specific items you want to appear in the pulldown here with carriage returns. We also suggest you manually type in the word “Select” as the first value. For example:

        Pick List Values:

        (Select)
        Choice A
        Choice B

  - **True of False**: This is used when you want the user to enter only a true or false value. It will be presented to the user as a checkbox (checked = true, unchecked = false).
  - **Date and Time**: The user will only be allowed to enter a date/time, and will be prompted with a clock and calendar dialog to help them.
  - **Date**: The user will only be allowed to enter a date, and will be prompted with a calendar dialog to help them.
  - **Time**: The user will only be allowed to enter a time, and will be prompted with a clock dialog to help them.
- **Required/Mandatory fields**: These boxes define if a custom field is required or mandatory for a user/customer to fill out.
- **Description**: For fields marked “visible”, when your customers hover over Custom Fields on the Customer Hub, this text will be displayed in a pop-up. For fields not “visible” this field can be used for internal informational purposes.
- **Visible on Portal**: allows you to define which of your custom fields are shown to users of your Customer Hub. When this field is enabled, the Custom Field is displayed on the New Ticket form and the values can be populated by the Hub user. This is a great way to capture necessary information from your customer during the initiation of the ticket. Additionally, the values are displayed on existing Ticket pages. You can optionally allow Hub users to modify these fields. Leaving the “Visible on Portal” flag disabled allows you to have some fields which are only displayed to internal TeamSupport users. Note that the Visible flag only applies to custom fields under the “Tickets” Field Type. Please note that mandatory fields can be set for your customers on the Customer Hub.
- **Masks**: Input masks allows a user to more easily enter fixed width input where you would like them to
enter the data in a certain format (dates, phone numbers, etc).

**Grouping:**

Many TeamSupport customers tend to add a lot of custom fields under the Customers section. To help better organize this data, you can group fields into categories. Just click on the “add category” link, then drag/drop the custom fields where you want them to be. You can also drag/drop entire categories to reorder.

<table>
<thead>
<tr>
<th>General Info (Custom Category)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Revenue (Text)</td>
</tr>
<tr>
<td>Customer Type (Pick List)</td>
</tr>
<tr>
<td>Features (Text)</td>
</tr>
<tr>
<td>Language (Pick List)</td>
</tr>
<tr>
<td>Status (Pick List)</td>
</tr>
<tr>
<td>Contract # (Number)</td>
</tr>
<tr>
<td>Acct# Pin Preference (Text, Visible to Customers)</td>
</tr>
<tr>
<td>Trial Expiration (Date)</td>
</tr>
<tr>
<td>Payment Status (Pick List)</td>
</tr>
<tr>
<td>Plant Location (Pick List, Required)</td>
</tr>
<tr>
<td>License Expiration Date (Date, Required)</td>
</tr>
<tr>
<td>Last Health Check (Date, Visible to Customers)</td>
</tr>
</tbody>
</table>

Add Custom Field

<table>
<thead>
<tr>
<th>Relationships</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant (Text)</td>
</tr>
<tr>
<td>Partner (Text)</td>
</tr>
<tr>
<td>Reseller ID (Text)</td>
</tr>
</tbody>
</table>

Add Custom Field
Mandatory Custom Fields

Often TeamSupport users find it necessary to enforce mandatory fields which must have a value. We make this quite simple by having a checkbox for "A Value is Required" or "A Value is Required prior to closing a ticket" in the custom fields setup.

It is important to note that this applies to custom fields only that are of the types Text, Date and Pick List. Your My Company section has settings for a handful of standard “stock” fields which may be set as required as well.

From Admin->Custom Fields tab, create a new or edit a custom field by clicking on the pencil icon next to the custom field you would like to edit.

- A Value is Required – a user will not be able to make a change to a ticket without first filling out the custom field(s).
- A Value is Required prior to closing a ticket – a user will not be able to select a “closed status” for a ticket without first filling out the custom field(s).

In each of the above cases, if a user needs to be reminded of the mandatory custom field, the fields will be displayed with a red box as seen below:
Special Note for Pick Lists

It is highly suggested that the first value you add to any pick list is something that will trigger the user to do something. Call it “Select”, “Choose”, etc. Next, select the field “The first value is not a valid selection for a required field.”

Special Note “Visible on Portal”

If you select “Visible on Portal” as well as “A value is required”, this will require your customer to populate this custom field from your Customer Hub.
Input Masks (Custom Fields)

Input masks allows a user to more easily enter fixed width input where you would like them to enter the data in a certain format (dates, phone numbers, etc). A mask is defined by a format made up of mask literals and mask definitions. Any character not in the definitions list below is considered a mask literal. Mask literals will be automatically entered for the user as they type and will not be able to be removed by the user. The following are the mask definitions:

- a – Represents an alpha character (A-Z,a-z)
- 9 – Represents a numeric character (0-9)
- * – Represents an alphanumeric character (A-Z,a-z,0-9)
- ~ – Represents an alphanumeric character or symbol (A-Za-z0-9`~!@#$%^&*()_+-={}|:';>?)

For example:
The mask of the social security number is “999-99-9999”. The user will see ___-__-_____ and it will only be able to enter numbers in the blank spaces and will not be able to remove the dashes.

You can have part of your mask be optional. Anything listed after ‘?’ within the mask is considered optional user input. The common example for this is phone number + optional extension. e.g. “(999) 999-9999? x99999"
Conditional Custom Fields

Conditional Custom Fields are available for Ticket Custom Fields and can display certain custom fields based on a value that was selected in a “Parent” field. A “Parent” field can be another Custom field Pick List, and/or a Product selection (available in Enterprise edition). If a Parent Custom Field and a Parent Product are chosen, both must be selected before the “child” field will be displayed.

To setup conditional custom fields, browse to Admin->Custom Fields. Choose “Field Type” “Ticket”. Next make a selection under the “Ticket Type” drop down menu.

Click the “Add Custom Field” button, or hover over an existing custom field and click the pencil button to edit the entry. The following fields will be available:

- **Parent Field**: Allows you to choose a Parent Value below. This field will be hidden if you do not already have a Custom Pick List field defined in your list.
- **Parent Value**: This value in the Parent Field above will need to be selected on the ticket page in order for the field you are editing to be displayed. This field will be hidden if you do not already have a Custom Pick List defined in your list.
- **Parent Product**: This Product will need to be selected on the ticket page in order for the field you are editing to be displayed.

Field definitions:

- **Parent Field**: Allows you to choose a Parent Value below. This field will be hidden if you do not already have a Custom Pick List field defined in your list.
- **Parent Value**: This value in the Parent Field above will need to be selected on the ticket page in order for the field you are editing to be displayed. This field will be hidden if you do not already have a Custom Pick List defined in your list.
- **Parent Product**: This Product will need to be selected on the ticket page in order for the field you are editing to be displayed.

Click [here](#) to read more about the other options in Custom Fields.
Custom Properties – Advanced

The Custom Properties section allows you modify, add and delete the various properties in the application to customize it to have exactly the data you want.

There are six different types of custom properties:

- **Ticket Type**: These are the highest level of categorizing your tickets.
- **Action Type**: When you add an action to a ticket, the action has a “type” such as “comment”, “email”, “phone call”, etc. You can modify these action types to call them what you want here.
- **Phone types**: This allows you to create different phone types (mobile, home, work, etc) for users and customers.
- **Product Version Status**: In the Products section pf the application, each product can be assigned a status. Typically these statuses are things like “Alpha”, “Public Beta”, “Release Candidate”, “Shipping” and “Discontinued”, although each organization follows their own methodology. You can also set a checkbox to show if the version is shipping (eg “Shipping” would have this checked while “Alpha” would not) and Is Discontinued.
- **Ticket Severity**: Every organization has their own way of classifying how serious a ticket is. You can set the terminology that your organization uses here. Please note that you can automatically change a ticket severity using [Ticket Automation](#). You can also change severities on more that one ticket at once from the [Ticket Grids](#). Ticket Severity may be used in the [CDI](#) calculation which extends it’s value to be used in determining a Customer’s overall health and satisfaction.
- **Ticket Status**: This allows you to set the various statuses for each of the four types of tickets. Ticket Statuses, combined with Workflow (see next section) define the lifecycle of a particular ticket. Basically, the statuses define the various stages that a ticket can go through during its life. Some organizations have just a few statuses (just “open” and “closed” would be fine) while others have many different statuses that a given ticket can be. Thought and planning should be given to what statuses a given ticket can have, and if you want to discuss this please give us a call.
- **Activity Type**: If you learn intel, or engage with your Customers in any way outside of a ticket, these interactions can be added as Activities. Activities organize non-ticket related information that the whole team can use to understand and build the Customer relationship. There are 4 basic Activity Types which do not appear in this list: Note, Call, Email, and Visit. Any other type of activity can be added/edited. Some ideas are notes about new employees, site information, and important information about the customer that your users should be [Alerted](#) about.

A couple of points which are worth mentioning:

- The possible statuses are different for the four different [ticket types](#). (eg A status for a Task probably
isn’t appropriate for a Feature request).

- Workflows are interrelated with statuses.
Ticket Types

Ticket Types are a core feature of TeamSupport and allow you to classify tickets in a structured manner. The system provides complete flexibility in how you configure ticket types, and we also let you define different custom fields for each ticket type.

A few notes about Ticket Types before we get started:

- **What Ticket Types should I have?** When building your Ticket Type list, you should think of what types of questions your customers have. If your business is a software company, you may have Support, Bug, and Feature Request questions from your customer. If your business is in manufacturing, you may have Hardware or Software questions, or may need to manage RMA’s. A service industry may have questions relating to Billing, Complaints, and Orders. You should limit your Ticket Types to 8-10, otherwise your agents may have a hard time deciphering which Ticket Type is best for their incident.

- **Custom Fields:** Custom Fields are another major part of customizing your workflow in TeamSupport. Custom fields are based on your Ticket Types. You may want to consider this when building your Ticket Types. For example, if there is a certain project that requires unique data to be collected, you may want to separate this into its own Ticket Type so that it can have its discrete list of Custom Fields. Similarly, if you have several different types of questions that end up sharing Custom Fields, you might consider combining those into one Ticket Type.

- **Ticket Automation:** You can automatically change Ticket Types using Ticket Automation.

- **Reporting:** It is likely that you will setup many reports against your Ticket Types because they will be so core to your business. There are default reports in your account based on Ticket Type, or you may create your own reports.

- **Default settings:** When you first log into a TeamSupport trial account there will be a handful of Ticket Types pre-configured to help you get started. It’s important to understand that these pre-configured Ticket Types can be changed to whatever you want.

- **Product Lines:** TeamSupport customers with Enterprise Edition can associate Ticket Types to Product Lines. This means Ticket Types with an associated Product Line will only appear as an option on tickets within the app if the Product Line has been associated. Optionally, Ticket Types can be filtered on the Customer Hub based on the Product Line association as well. This option is configured in the **Basic Hub Settings Tab**.

From the System Property Type pull down, select Ticket Types.
Here you can Edit (pencil icon), Delete (trashcan icon) and re-order (up and down green arrows) how your ticket types appear.

Tickets created via email or the Customer Hub will default to the FIRST ticket type you have defined. You can change which ticket type is created by these methods just by changing the order of the ticket types in the above menu and putting the one you want to be the default at the top.

To Add a new ticket type, click the “+ Add” link.

Field Definitions

- **Name**: Required. Give the field a short logical name that will be displayed to all users and customers
- **Description**: This is a longer description of the Ticket Type. This will only be made available internally.
- **Product Line:** TeamSupport offers a feature called Product Lines, which allows you to group your Products together. One feature of Product Lines is the ability to filter your Ticket Types based on Product selection on a ticket. In order for this to work, you must first setup your Products within your Product Lines. Next, create your Ticket Types and assign a Product Line. When a Product is selected on a ticket, the Ticket Types that match the Product Lines will be available for selection. Optionally, Ticket Types can be filtered on the Customer Hub based on the Product Line association. This option is configured in the [Basic Hub Settings Tab](#).

- **Icon:** This icon will be displayed internally within TeamSupport for your Support representatives. We have included a few defaults but feel free to upload your own icons. 16×16 is the standard size for these icons.

- **Visible On Portal:** The Visible On Portal option allows your customers to choose which type of ticket they want to submit. This is optional, and if you don’t have the ticket type visible on the Customer Hub, new tickets created via the Customer Hub will default to the first ticket type.

- **Is Active:** Default: Unchecked. At times you may wish to retire a Ticket Type that you no longer need. The “Is Active” checkbox allows you to mark a Ticket Type as no longer being active. If a Ticket Type was previously active, and then you uncheck this box, the Ticket Type will no longer be available throughout the system. It will remain on Tickets that already had this selection for historical purposes.

- **Exclude from CDI:** TeamSupport’s Customer Distress Index (CDI), captures information about your Customers and calculates a “score” to indicate their satisfaction level. By checking this box, tickets in this Ticket Type will be excluded from the CDI calculation. This may be necessary for Ticket Types that are not related to the satisfaction of your Customers, or skew the metrics (i.e. automatically generated tickets, internal tickets).
Ticket Statuses

Ticket Statuses reflect the current state of a ticket and are completely customizable on a per ticket type basis.

Ticket Statuses can be a very important part of your ticketing system. Here are several points to consider when you are adding Ticket Statuses:

- **Keeps Users prioritized:** Ticket Statuses are used to identify major and interim steps that a ticket might be in at any given time. This granularity allows your users to quickly filter through tickets on their Ticket Grids based on statuses. For example, a User may want to focus first on tickets with a status of “New” or “Customer Replied”, as opposed to tickets with a status of “On Hold” or “Pending Customer Reply”. This allows your Users to be able to prioritize themselves and keep their tickets organized.

- **Metrics:** Ticket Statuses can give Supervisors insight into how long response times are, and other important metrics. You will find a table called “Ticket Status History” in our Reporting tool which will allow you to analyze this data.

- **Can be managed in Ticket Automation:** You can automatically change a ticket status using Ticket Automation. One common use of this is to have a status called “Pending Closure”. Your users can select this status, then a few days later, Ticket Automation can actually close the ticket by updating the status to “Closed”. This may be used if you feel like you need to give your Customers a heads up before the ticket actually closes.

- **Keeps Customers in the loop:** Status are displayed on the Customer Hub for your Customers to view. If you find that your Customers often ask questions regarding what the status is of their accounts, directing them to the Customer Hub will allow them to find this answer on their own without a request from your Support team.

- **Bulk status changes:** You can change multiple statuses at once from the Ticket Grids.

Ticket statuses are completely customizable and are unique to each ticket type. Having unique status based on your ticket types allows you the flexibility to define different workflows for different types of tickets. For example, you may have a ticket type called “Billing” which has unique steps and status that are not found in any other group or type of ticket. You can create as many statuses as you like, and can also configure Workflow around them.

To customize your ticket status, go to the Admin section on the left hand navigation, then select the “Custom Properties” tab. Select “Ticket Status” from the “System Property Type:” drop down menu. Finally, select the ticket type you would like to work with.

- **The first status in the list will be used as the default status. This is the status that will be used when a new ticket arrives in your system, so we recommend calling this status “New”. The statuses will appear in the dropdown list on a ticket in the same order as they appear in**
It should look something like this:

![Ticket Status List](image)

From here, you can modify all of the possible “steps” or “statuses” a ticket can be in during its lifecycle.

**Adding Status:**

Click the Add icon in the upper right of the form. The following appears:

![Type Editor](image)

- **Name:** This field names the status. The name will appear in the drop down list on the Ticket Page and throughout TeamSupport and the Customer Hub. This field is required.
- **Description:** The Description field is optional. It will be displayed in this admin menu to give a brief
description for what the purpose of the status should be.

- **Is Closed**: This field will tell TeamSupport that the ticket is in a closed state when this status is selected. You may have several statuses which indicate the ticket is closed. For example, in a Task ticket, you may have closed states for “Completed” and “Abandoned” – Both with indicate that the ticket is closed, but with different results.

- **Send Closed Email**: This setting will force TeamSupport to send a specific email message to you customers when a ticket is closed. The template for this email can be customized by going to Admin- > Email and editing the template for “Ticket Closed”. Please Note: This setting applies to the “Ticket Closed” email only. To prevent Ticket Closed and Status Update emails from being sent when a closed status is selected, you must set “Send Closed Email” = False AND “Disable ticket status update emails” = True. The “Disable ticket status update emails” is found under Admin -> My Company -> General Tab. By default, a Ratings message is embedded in your Closed Email template.

- **Email Response**: This field can be “True” for only one of your statuses, and you might choose to call this status “Customer Replied”. If a customer updates a ticket that has a status other than your default status (described above) either via email reply or from the Hub, it will get updated to this status. Oftentimes a customer will submit a ticket, and then reply quickly back to the confirmation email before your team has a chance to respond to the ticket. For this reason, if a ticket is in the default status, and a customer replies, the status will not be updated. This email response status is important because it will indicate that a customer is waiting for your response. You may also wish to capture metrics on this status, and the default status, to determine how long your customers wait to hear back from your Support team.

- **Pause SLA**: If you will be using the SLA feature, you may want to pause the timer on the SLA on certain statuses. For example, you may not want to include time spent where you are waiting for a response from a customer. In this example, you may have a status called “Pending Customer Reply” which has the Pause SLA box checked.

**Related Topics**

- **Customer Emails Upon Status Change**: You have the option to send email updates whenever there is a status change on a ticket. This may help to keep your customers up to date with the ongoings of a ticket. The setting can be found under Admin -> My Company tab -> “Disable ticket status update emails”. By default, this setting is “False” which means if you have a ticket that is marked “visible to customers” and a contact associated to the ticket, each time the status changes on a ticket, an email will be sent to the customer. This email template is called “Ticket Update” and can be configured in your admin section.

- **Workflow**: To add workflow to these ticket statuses, please remember you need to visit the Workflow tab after your status have been defined. More specifically, what statuses will be visible as next possible selections based on the current status selected within each ticket.
Ticket Automation

Ticket Automation is a powerful feature within TeamSupport that allows you to create rules for handling tickets. The potential uses of Ticket Automation are almost limitless, but a few examples include:

- Automatically reminding customers when they haven’t responded to a ticket
- Managing escalation when a ticket has been opened longer than a certain time
- Notifying managerial users if a ticket bypasses a specified threshold
- Rounding the ticket to a specific user or group depending on keywords in the subject of the ticket
- Sending an automatic response to a user with specific tips if there are keywords in the subject
- Putting a ticket in a specific user’s queue automatically
- Changing the queue of a ticket if a certain Product is specified
- Changing the group of a ticket if a certain Custom Field value is specified

Triggers consist on one or more conditions, and one or more actions. Here are some tips for creating Ticket Automation Triggers.

Trigger Tips

Here are 5 triggers that are very commonly configured:

**TIP 1**
Auto assign a ticket to a specific user: When a ticket is created via email or the Customer Hub, you can define a trigger that the ticket gets assigned to a specific person on your team. In this case, we will use ticket name – here’s how it works.

1. Setup a trigger and call it something like “auto assign to Chris”.
2. Set a condition where ticket name contains Chris.
3. Set an action that assigns to user Chris.

If you are forwarding in an email to your account, just add Chris to the subject line and when the ticket gets created, automation will fire the trigger and assign the ticket to Chris. Same applies if a ticket comes in from the Customer Hub. If the ticket subject contains Chris, the ticket will be assigned to Chris.

To get a bit more advanced with this, you could create commands with hashtags (ie #bug to set the ticket type to a bug automatically) to allow all kinds of automatic ticket rules.

**TIP 2**
Remind your customer that the ticket is awaiting their reply: Often times, a customer submits a ticket and more info is needed by your team. So you log a visible action asking them for the additional info, then set the status to “waiting on customer” (or whatever you’ve defined in your statuses). Rather than letting the ticket sit and collect dust, you can poke your customer with a nice email to remind them that the ticket is
pending their reply – here’s how it works.

1. Setup a trigger and call it something like “customer reminder”.
2. Set a condition where Status = waiting on customer
3. Set another condition where days since the ticket was last modified = 7 days.
4. Set an action to log a visible action. When you do this, a text editor box will appear. Type in something nice and generic, such as “We know you are busy, but wanted to remind you that this ticket has been awaiting your reply for 7 days. Please reply to this email with the requested information as soon as possible. Thanks!”…Or something along those lines.

**TIP 3**
Auto close a ticket: Carrying over the scenario from tip 2, if your customer still does not update the ticket after the reminder, you can close the ticket and let the customer know it has been closed. Here’s how it works.

1. Setup a trigger and call it something like “No customer reply – auto close ticket”.
2. Setup a condition where Status = waiting on customer”.
3. Setup another condition where the days since the ticket was last modified = 14
4. Set an action to log a visible action. In the text edit box, type in a nice generic message, such as “We know you are busy, however this ticket has been open and awaiting your reply for 3 weeks. At this time, we assume your issues has been resolved and this ticket is now closed. If this is not the case, simply reply to this email which will reopen the ticket and notify our staff.
5. Set a second action to close the ticket.

**TIP 4**
To make sure that urgent tickets are not missed, especially when they are created after hours, you can make an Automation which will send a text message when an urgent ticket is created.

1. Create a trigger called “Urgent Ticket” or similar.
2. Set a condition where Severity = Urgent
3. Create a “Notify External User” action, and set the email address to the address of the phone you want to text. Here’s a list of how to send a text message to most carriers.

**TIP 5**
If a ticket is created over the weekend, you may want to let your customer know it will be Monday before they will get a response. To do this, simply set up a rule which adds a public action (which will generate an email to your customer) if the ticket was created on a Saturday or Sunday.

1. Create a trigger called “Weekend” or similar.
2. In the “ALL” logic section, create a condition for “Visible on Portal” (this means the ticket is visible to customers, and is not an internal ticket) = True
3. In the “ANY” logic section, create two conditions: One for “Day of Week Created” = Saturday, and one for “Day of Week Created” = Sunday.
4. In the Actions section, create an action for “Log Public Action” and put something like “We’re sorry, but we do not offer support over the weekend – We will respond to your ticket as soon as we can on Monday” in
the text box.

**Related Topics**

- [Create a new Ticket Automation Trigger](#): Instructions on how to create or duplicate a trigger.
- **Placeholder Variables**: There are a handful of placeholder variables which can be used in the Log Public/Private Actions and Notify User Actions. Simply place the text as below, including the “squiggly parenthesis” and the text will be replaced by the correct variable when the e-mail is sent or the action logged.
- **SQL Wildcards**: Explore wildcards that can be used in SQL conditions.
Creating a Ticket Automation Trigger

Important Note

There are a few important things to remember about ticket automation:

• **Ticket Automation will only work on tickets that were modified after the trigger was created.** This is a safety mechanism put in place so that if a mistake is made and you create a trigger that affects lots of tickets incorrectly, we don’t go back and retroactively change tickets.

• **Each Trigger can only affect a given ticket once, even if the ticket matches all of the triggers again.** This is another safety feature put in place so we don’t get into a situation where we continually change the same ticket, or end up in a loop situation.

• **Triggers will be disabled if the trigger’s respective conditions have not been met within a years time.**

Ticket Automation is controlled by creating a Trigger. Each trigger has specific rules, and when those rules are met one or more actions are performed.

Creating a Ticket Automation Trigger

- New Trigger
- Duplicate Trigger
- Delete Trigger
- Refresh

• **New Trigger Button:** To create a new Ticket Automation Trigger from scratch, click the New Trigger button.

• **Duplicate Trigger Button:** You may create a new trigger from an existing trigger by clicking on the Duplicate Trigger Button. All of the settings get carried over to the new trigger, including the name. You must rename the trigger so that it has a unique name.

• **Delete Trigger Button:** Click this button to delete a trigger. This is not reversible.

• **Refresh Button:** Use the refresh trigger button if you feel that your trigger list needs to be manually refreshed. For example, if you are testing an automation trigger and would like to see if indicates whether it has made any additional updates to tickets.

Here is an example of a Ticket Automation Trigger:
• **Trigger Name**: Give the trigger a logical name. Ticket Automation runs on a timer. It will start through the Ticket Automation triggers in alphabetical order for each cycle. If you are interested in ordering your triggers, one method is to name them alphabetically. For example, use a number naming scheme like “01 – Initial Alert”, “02 – Alert to followup after 2 weeks”.

• **Enable/Disable**: You have the choice to enable or disable a trigger at any time.

• **Statistics**: Each trigger will indicate how many tickets it has modified, and will list a timestamp for its last modification.

**Conditions**

The rules section has two areas to allow you to tightly define what tickets meet the trigger criteria. In the top section you define conditions that **ALL** have to be met (a logical AND), and in the bottom section you list conditions where any of the items can be met (logical OR).

The trigger in the above screenshot will fire if the ticket is 3 days old (“Days Since Ticket was Last Modified” is the field name) and has a status of “Pending Customer Reply”. If both of those are true then it means we have been waiting for a customer to respond and it’s time for a nudge.

Most of the fields that are found under the conditions section are self explanatory as they are data fields in
the ticket table. You will find Custom Fields in your list which are unique to your account. Creating triggers against your Custom Fields will allow you to create triggers that are completely customized for your organization. If your custom field is a pick list, you will be prompted to select which value will be used as a condition. Here are some standard fields that may require more explanation.

- **Days/Minutes since Ticket was Created**: These fields allow you to trigger based on how many minutes or days have elapsed since the ticket was created.
- **Days/Minutes since Ticket was Last Modified**: These fields allow you to trigger based on how many minutes or days have elapsed since the ticket was last modified.
- **Day of Week/Hour of Day Created**: These fields allow you to trigger based on the day of the week or hour of the day the ticket was created. Hour of day should be in 24 hour format. For example, 8:00 am will have a value of 8, and 1:00 pm will be value 13. It is okay to have 1 digit numbers, and you should not lead or trail with zeros. Again, the correct value for 8:00 am is 8, not 08 or 0800. All times are local to the account in which they are created, which can be found under Admin->My Company.
- **Minutes/Hours since Last Action Added**: These fields allow you to trigger based on how many minutes or hours have elapsed since the last action in a ticket was added.
- **Current Day/Hour of the Week**: These fields allow you to trigger based on the current day of the week or hour of the day. This is typically combined with another AND condition (i.e. Ticket was created less than 1 minute ago). Hour of day should be a two digit number in 24 hour format. For example, 8:00 am will have a value of 08 or 8, and 1:00 pm will be value 13.
- **Agent Rating**: This field allows you to take action if a rating is left by your customers that is either Positive, Negative, or Neutral. You may want to combine this with posting a Water Cooler action (below) to give your team a high five for a positive rating.
- **Assigned User is Available/Busy**: These fields will allow you to trigger based on the availability of the user assigned to the ticket. If the user sets their status to Busy (for example while they are on vacation), you might decide to assign the ticket to a different user.
- **Various SLA**: There are a handful of conditions relating to SLA. These are not required for the SLA to send notifications. You can use these conditions in extension to the notifications that are available as standard within the SLA definition.

For the following Customer fields: if there is more than 1 customer on the ticket, the trigger will only consider the FIRST customer in the list:

- **Customer Custom Value**: This fields allows you to trigger off of custom fields on the CUSTOMER record. When you select ‘Customer Custom Value’ you’ll get another pull down menu for the available custom fields on the Customer record. You can then choose the value for that Custom Field.
- **Service Level Name**: The SLA assigned to the customer
- **Customer CDI Value**: Allows you to set a trigger based on the current CDI value of the Customer.
- **Customer CDI Trend**: Allows you to set a trigger based on the current CDI trend. Values are: 0 (no change), -1 (going down – which is good), 1 (going up – which is not good).
- **Service Expiration Date**: The trigger can look for the date of the Customer’s Service Agreement Expiration Date.
- **Service Expired**: This fields asks the question, “Is the current date past the Service Agreement
Expiration Date for this Customer?”. In other words, it checks if the Customer’s Support Service contract has run out.

- **Customer Is Active**: This field checks to see if the Customer is active. Values are True or False.

### Actions

Once the trigger conditions have been defined, you can create actions to be performed when the conditions have been met. Any number of actions can be added.

The “nudge” referenced in the example above is in the form of a public action. We are using the action “Log Public Action” which will place the text into an action for this ticket. Since it’s a public action your customer will get an e-mail notification automatically.

Usually a Trigger like this is paired with another Trigger that will close the ticket in a few days. Note if you have two Triggers that you want to happen sequentially, and they are both looking at the Days Since Ticket was Last Modified”, you need to have the number of days for the second one larger than for the first one – Otherwise, you could get into a situation where the ticket was closed before you asked the customer to respond to the ticket!

Here is the list of available actions:

- **Set Status**: This will change the status of a ticket. Used for automatically moving a ticket to a new status.
- **Set Severity**: This will change the severity of a ticket, and is used to manage automatic escalations.
- **Log a Public Action**: This will add an action to the ticket which is visible to the end user (assuming the ticket itself is marked “Visible to Customer”). This will generate an e-mail notification to the end user as well. When this action is selected, a textbox will appear and allow you to enter the text to be added. Please see “Placeholder Variables” below for a way to add data about the ticket to the action.
- **Log a Private Action**: Adds a private action to the ticket. No e-mail is generated to the end user, but internal TeamSupport users will be notified as normal. When this action is selected, a textbox will appear and allow you to enter the text to be added. Please see “Placeholder Variables” below for a way to add data about the ticket to the
- **Assign Ticket to an Individual**: The ticket’s owner will be changed to the user specified.
- **Assign Ticket to a Group**: The ticket’s group owner will be changed to the one specified.
- **Notify User**: This will generate an e-mail to the TeamSupport user specified. The e-mail will be the text that is entered in the text box. Please see “Placeholder Variables” below for a way to add data about the ticket to the e-mail.
- **Close Ticket**: Sets the status of the ticket to the first status that indicates a ticket is closed for that ticket type.
- **Enqueue** Ticket: Places the ticket the specified user’s queue.
- **Notify External User**: Generates an email to an external email address(s) (ie the user doesn’t have to be a TeamSupport user). One of the interesting ways this can be used is to send a text message to alert agents of tickets by using an email to text message gateway. [Here’s a list of how to send a text](#)
message to most carriers.

- **Associate Product to Ticket**: This will associate the ticket to a specific product. Often used if a keyword is found in the ticket body which would indicate the automatic assignment to a specific product.
- **Make Ticket Public**: Forces the ticket to be visible to the customers associated with it.
- **Make Ticket Private**: Forces a ticket to be private.
- **Subscribe User**: Subscribe a TeamSupport user to the ticket so that they are notified whenever a change is made to the ticket.
- **Flag Ticket**: This will flag a ticket for a specific user.
- **Unflag Ticket**: This will unflag a ticket for a specific user.
- **Set Ticket Type**: Allows you to change the ticket type.
- **Unflag for All Users**: If the ticket is flagged by any users, this will remove the flag for all users.
- **Unsubscribe All Users**: This will unsubscribe all users from a ticket.
- **Unqueue from All Queues**: This will remove the ticket from all users’ queues.
- **Enqueue Default Support Rep**: If a customer has a default support representative set up, this action will put the ticket into their Queue.
- **Unassign User from Ticket**: This will set the ticket owner to be “Unassigned”
- **Tag Ticket**: Associate the selected tag keyword with the ticket.
- **Auto Assign Ticket (Workload)**: Assigns the ticket to the person in the group with the fewest open tickets. If there are multiple people with the same number of unassigned tickets, this action will assign the ticket at random to one of these people. Note that we also take into account the “in office” setting and will not assign a ticket to a user who is marked as not in office.
- **Auto Assign Ticket (Random)**: Similar to the above, this action will assign a ticket to a person in a group by random. Over time this will evenly distribute the tickets to the people in the group. As with the above action, this action will not assign tickets to individuals who are marked as out of office.
- **Associate Customer/Contact to a Ticket**: Adds specified customer or contact to the customers section of the ticket
- **Set Custom Field**: Allows you to set a custom field based on ticket conditions. If your custom field is a pick list, you will be able to select the pick list value.
- **Post to Water Cooler**: Adds a post to the Water Cooler. A usage example for this is to give a high five to your team when your customers leave positive ratings on tickets, or if they close an urgent ticket quickly. Also, you can post urgent ticket notifications to the Water Cooler.
- **Unassign from Group**: Allows you to unassign a ticket from a group.

**Related Topics**

- **Ticket Automation Tips and Tricks**: A list of important information, tips, and suggestions for Ticket Automation Triggers.
- **Placeholder Variables**: There are a handful of placeholder variables which can be used in the Log Public/Private Actions and Notify User Actions. Simply place the text as below, including the “squiggly parenthesis” and the text will be replaced by the correct variable when the e-mail is sent or the action logged.
- **SQL Wildcards**: Explore wildcards that can be used in SQL conditions.
SQL Wildcards

Ticket Automation uses standard SQL Wildcards for search results.

• % : Use a percent symbol as a substitute for zero or more characters.
  For example:
  ![Action Name](action-name) ![Contains](contains) ![appl%](appl%)
  will return results that contain “apple” and “apples”

• _ : Use an underscore as a substitute for a single character.
  For example:
  ![Action Name](action-name) ![Contains](contains) ![_ear](_ear)
  will return both “pear” and “dear”

• [charlist] : Using a character list inside of square brackets sets a range of characters to match.
  For example:
  ![Customers](customers) ![Equal To](equal-to) ![bsp%](bsp%)
  will return Customers whose name starts with B, S, or P.

• [^charlist] or ![charlist] : Using a character list inside of square brackets beginning with a caret or exclamation point sets a range of characters that do NOT match. For example:
  ![Customers](customers) ![Equal To](equal-to) ![lbsp%](lbsp%)
  will return Customers whose name does NOT start with B, S, or P.

Related Topics

• **Ticket Automation Tips and Tricks**: A list of important information, tips, and suggestions for Ticket Automation Triggers.
• **Create a new Ticket Automation Trigger**: Instructions on how to create or duplicate a trigger.
• **Placeholder Variables**: There are a handful of placeholder variables which can be used in the Log Public/Private Actions and Notify User Actions. Simply place the text as below, including the “squiggly parenthesis” and the text will be replaced by the correct variable when the e-mail is sent or the action logged.
Placeholder Variables for Ticket Automation

Placeholder Variables

There are a handful of placeholder variables which can be used in the Log Public/Private Actions and Notify User Actions. Simply place the text as below, including the “squiggly parenthesis” and the text will be replaced by the correct variable when the e-mail is sent or the action logged. They are:

Administrative Placeholders

- {{MyCompany.Name}} – The name of the parent organization (not the client’s)

Contact Placeholders: Please note that only one contact will be returned using the Contact placeholders. If multiple Contacts are present on a ticket, only the first Contact will be returned.

- {{Ticket.ContactFirstName}} The first name of the first contact listed on the ticket
- {{Ticket.ContactLastName}} The last name of the first contact listed on the ticket
- {{Ticket.ContactFullName}} The full name of the first contact listed on the ticket
- {{Ticket.ContactEmailAddress}} The email address of the first contact listed on the ticket

Custom Field Placeholders

- {{TicketCustomField.xxxx}} Where ‘xxxx’ is the Custom Field name (not the API name). Spaces are okay.

Ticket Placeholders

- {{Ticket.TicketNumber}} – The ticket number
- {{Ticket.Name}} – The ticket name
- {{Ticket.Customers}} – A list of customers associated with the ticket
- {{Ticket.AssignedTo}} – The user the ticket is currently assigned to
- {{Ticket.Status}} – Status of the ticket
- {{Ticket.Type}} – The Ticket Type
- {{Ticket.ProductName}} – Product associated with customer
- {{Ticket.GroupName}} – Group the ticket is assigned to
- {{Ticket.Severity}} – Severity of the ticket
- {{Ticket.URL}} – A hyperlink to the ticket. Clicking on this will open TeamSupport and take you to the ticket.
- {{Ticket.SlackURL}} – Due to the way that Slack handles URLs (they don’t support standard HTML hyperlinks), if you are using a ticket automation that posts to slack you need to use this placeholder instead of {{Ticket.URL}} when referencing a ticket.
- {{Ticket.DaysSinceModified}} – Number of days since the ticket was last modified

Contact Placeholders: Please note that only one contact will be returned using the Contact placeholders. If multiple Contacts are present on a ticket, only the first Contact will be returned.

- {{Ticket.ContactFirstName}} The first name of the first contact listed on the ticket
- {{Ticket.ContactLastName}} The last name of the first contact listed on the ticket
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- {{Ticket.Severity}} – Severity of the ticket
- {{Ticket.URL}} – A hyperlink to the ticket. Clicking on this will open TeamSupport and take you to the ticket.
- {{Ticket.SlackURL}} – Due to the way that Slack handles URLs (they don’t support standard HTML hyperlinks), if you are using a ticket automation that posts to slack you need to use this placeholder instead of {{Ticket.URL}} when referencing a ticket.
- {{Ticket.DaysSinceModified}} – Number of days since the ticket was last modified
• {{Ticket.MinsSinceModified}} – Number of minutes since the ticket was last modified
• {{Ticket.DaysSinceCreated}} – Number of days since the ticket was created
• {{Ticket.MinsSinceCreated}} – Number of minutes since the ticket was created
• {{Ticket.TicketTypeName}} – The ticket type
• {{Ticket.ReportedVersion}} – Version that the issue was reported in (Enterprise version only)
• {{Ticket.SolvedVersion}} – Version the issue was resolved in (Enterprise version only)
• {{Ticket.DateCreated}} – Date/time the ticket was created (returns time in UTC, not local time)
• {{Ticket.DateModified}} – Date/time the ticket was last modified (returns time in UTC, not local time)
• {{Ticket.DateClosed}} – Date/time the ticket was closed (returns time in UTC, not local time)
• {{Ticket.DaysClosed}} – Number of days the ticket as been closed
• {{Ticket.DaysOpened}} – Number of days the ticket was open
• {{Ticket.CloserName}} – Name of the person who closed the ticket
• {{Ticket.CreatorName}} – Name of the person who created the ticket
• {{Ticket.ModifierName}} – Name of the person who last modified the ticket
• {{Ticket.HoursSpent}} – Hours spent addressing issue
• {{Ticket.Tags}} – Tags that are associated with the ticket
• {{Ticket.Contacts}} – Customer contacts who are associated with ticket
• {{Ticket.TicketSource}} – Where the ticket originated from (email, web, agent, etc)

Related Topics

• Ticket Automation Tips and Tricks: A list of important information, tips, and suggestions for Ticket Automation Triggers.
• Create a new Ticket Automation Trigger: Instructions on how to create or duplicate a trigger.
• SQL Wildcards: Explore wildcards that can be used in SQL conditions.
TeamSupport has the ability to define various levels of SLAs and assign these to Customers, Products, or both (Customer/Product associations). A Service Level Agreement (SLA) is a negotiated agreement between two parties where one is the customer and the other is the service provider. This can be a legally binding formal or informal “contract”. The SLA records a common understanding about services, priorities, responsibilities, guarantees, and warranties. The SLA may specify the levels of availability, serviceability, performance, operation, or other attributes of the service.

Another way of thinking of an SLA is a warning system to make sure that tickets are dealt with in a timely manner and none are forgotten or go “stale”.

**Quick Tips**

- **Pausing SLA based on status**: A very power feature in SLA is the ability to “pause” the SLA timer based on the current status of the ticket. For example, you may not want to include time spent where you are waiting for a response from a customer. In this example, you may have a status called “Pending Customer Reply” which has the Pause SLA box checked in your Admin settings. Any of your status can be setup to pause your SLAs. When a status is changed again, the SLA will pickup timing where it left off.
- **Ticket Automation**: You can use SLA status as a condition in Ticket Automation. This can be used as an extension of the notifications that are standard in SLA.
- **Reporting**: SLA is also available to report against in our Reporting section. Two “secondary tables” are available: SLA Status Paused Times and SLA Violation History under the Tickets “primary table”.

*Click here* for a useful template that may help you to build an SLA between you and your Customers.
• **New SLA:** Click this button to add a new Service Level. This Service Level will appear in the “Service Level Agreement” drop down menu below and will be available to assign to Customers/Products. Typically you will define these levels (think “Gold”, “Silver”, “ Bronze”, etc) to define the maximum amount of time that can pass before being in violation of the contracted SLA. There is not a limit to how many SLA’s you create in your system. A use case might be that your most important Customer has their own specific SLA that is created and assigned just for them.

• **Edit SLA:** If you would like to change the name of your SLA, make a selection from the “Service Level Agreement” menu below and click this button. This change will be made on any existing Customer and ticket that is associated to the SLA.

• **Delete SLA:** If you would like to delete an SLA from the “Service Level Agreement” menu below, you can click this button. You will receive a confirmation page before you delete. This deletion is permanent and cannot be recovered. If you delete an SLA, it will be removed from all Customer and Ticket associations.

• **Clone SLA:** The Clone SLA button allows you to make a copy of your SLA and all of it’s triggers. The new SLA will initially be named with (Clone) appended, but you may rename the SLA at any time.

• **Add Trigger:** The Add Trigger button is used to create an SLA trigger based on your SLA and Ticket Type selections.
Add/Edit an SLA Trigger

Once you have created an SLA, the next step is to select which Ticket Type would like to use. Selecting a Ticket Type is useful as different ticket types may have different SLA requirements. For example, a “Feature Request” might allow for longer response times than a “Bug” or an “Issue”.

All of your defined Ticket Types will be available in the Ticket Type drop-down menu:

Once you have your SLA and your Ticket Type selected, you are ready to create a new trigger. To do this, click either of the “Add Trigger” buttons:

To edit an existing trigger, press the pencil button next to the existing trigger:

The following screen will appear when you are adding or editing a trigger:

![SLA Trigger Screen](image-url)
**Violation Times**

<table>
<thead>
<tr>
<th>Time until initial response:</th>
<th>5</th>
<th>Minutes</th>
<th>Hours</th>
<th>Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time between actions:</td>
<td>5</td>
<td>Minutes</td>
<td>Hours</td>
<td>Days</td>
</tr>
<tr>
<td>Time until Closing:</td>
<td>20</td>
<td>Minutes</td>
<td>Hours</td>
<td>Days</td>
</tr>
</tbody>
</table>

**Notification Options**

- Notify Group of Warnings
- Notify Group of Violations
- Notify User of Warnings
- Notify User of Violations

- **SLA Name:** This value cannot be changed from this screen. It is based on the selection that you made on the previous window (see above).
- **Ticket Type:** This value cannot be changed from this screen. It is based on the selection that you made on the previous window (see above).
- **Ticket Severity:** The SLA is also defined against each severity so that a “Critical” ticket severity has a different and more stringent SLA than a “Minor” ticket.
- **Warning Time before Violation:** You can define when the warning time kicks in before each Violation. A ticket in warning state has color coding and notifications (see below).

- **Pause on Company Holidays:** You have the option to “pause”, or stop calculating time against your SLA’s on Company Holidays. These Holidays are defined in your TeamSupport Calendar. Holidays are defined as an entire day. If you choose to pause on Company Holidays, your SLA’s will resume counting on the following day where it left off.
- **Pause on Specific Dates:** Similar to pausing on a day listed as a Company Holiday, you may choose another specific date to Pause the SLA.

- **No Business Hours:** If your SLA should operate independently of your business hours use this default selection. This means your SLA times will be calculated during off peak times like overnight and the weekends.
- **Use Account Business Hours:** You can set up your Business Hours in your My Company settings. If you check this box, your SLA rules will only apply during these defined business hours.
- **Use Custom Business Hours:** If you have Custom Business Hours that need to be defined that are separate from your Account Business Hours, you can define them here. A use case for this might be if you are defining business hours for an SLA that will apply in a different timezone. You can name this SLA for the area that it will apply to, for example, “APAC – Bronze”, and then choose the appropriate timezone for the business hours. You have the following options for defining your custom Business Hours: SLA Start, SLA End, Timezone, and SLA Days (Monday – Sunday).

- **Violation Times:** We can define the SLA based on the following criteria:
  - **Time until initial response** This defines how quickly you must take the first action on a ticket – Typically this is something as simple as an acknowledgment that the ticket has been received.
The initial response is satisfied by a public action by default. However, there is a My Company admin setting that will allow private actions to also satisfy SLA first response.

- **Time between actions:** This defines the amount of time which can pass without any work being done on the ticket. In many cases, SLAs are defined for certain severities such that “continuous work” must be performed until resolution. In this case, a new public or private action would have to be added to the ticket by the user or the customer as the team worked to resolve the issue. You can also use this to highlight stale tickets by setting this value to a few weeks.

- **Time until Closing:** Perhaps the most important metric that the customer cares about – How long do they have to wait until the issue has been resolved.

**Notification Options:** Notifications of SLA warnings and violations are sent via Email and color coding is used on the user interface. Choose to whom notifications are sent to (users and/or groups) and when they are sent for warnings and violations. For example, for “High” severity Support tickets, you may want to send out emails for warnings and violations to assigned User and Group. However, for “Low” severity Feature Requests, you may only want to send out email notifications to assigned Users only for Violations only. **Please Note:** Group Notifications may be turned off on the User level. If a User has “Receive Unassigned or Assigned Group Notifications” set to “No”, they may not receive SLA notifications.

Our SLA color scheme is Green = No SLA issues, Yellow = SLA Warning state, Red = SLA Violation state. Colored notifications on the user interface can be seen in all ticket grids and in the SLA section on the Ticket detail window.

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To finalize your SLA setup, you must assign your SLA for your Customer, Product, or both. Click here to learn how finalize your SLAs.
Assigning SLAs

After you have created and added triggers to your SLA, to finalize your SLA setup, you will need to assign the SLA. There are 4 places where you can make this assignment. Customer Section, Customer/Product Association, Product Section, and Internal.

- **Customer/Product Association:** When you are assigning a Product to a Customer, you can indicate a specific SLA that should apply. This granularity gives you the flexibility of assigning multiple SLA’s to a Customer based on the different Products that a Customer is assigned.

- **Product Assignment:** Each Product can also have their own SLA’s assigned. Anytime a Product is associated to a ticket, the designated SLA would be applied.

- **Customer Assignment:** You can assign an SLA to be calculated anytime a Customer is assigned to a ticket by adding the SLA to their Customer in the Customer section. Each customer can be defined a specific SLA level so that your guaranteed response times on a ticket can be different depending on what customers are assigned to a ticket and their contracted SLA based on Ticket Type and Severity selection.

- **Internal SLA:** In addition to the typical use case for customer support, we take this feature a step further to allow our customers to create and define their own “internal” SLA. This SLA applies to tickets that do not have any customer or product association, and is a great way to stay on top of internal tickets. Once your SLA is defined, go to the Admin section -> My Company Tab -> Edit Properties and assign the internal SLA.

🌟 It is important to note the order in which SLA’s will be applied in the event that multiple SLA’s might be applied. The order is Customer/Product, Product, Customer, then Internal. This means Customer/Product SLA’s take precedence. If there is no Customer/Product SLA present, then the system will look for Product SLAs, and so on.
Workflow

To setup workflow, go to ADMIN -> WORKFLOW tab.

The ability to customize the workflow steps in TeamSupport is an extremely powerful feature. Basically this section allows you to define the possible next steps that a ticket can take when one status is selected.

While you may have defined several statuses for a given ticket type (above), most organizations want to impose work rules to make sure that a ticket cannot go from one status to another that doesn’t make much sense.

For example, you probably don’t want a Feature Request to go from “Open” to “Added” directly. You would probably want to make sure it goes to “Feature Request Approved” then to “In Design”, then to “Under Development”, then to “In QA”, then “Added”. Going from “Feature Request Approved” directly to “In QA” wouldn’t make a lot of sense.

In the Workflow section you first select the ticket type, then select the Ticket Status. The fields in the grid below will show only the steps which are the next possible steps from the one selected in Ticket Status. To use the previous example, if you selected “Open” in the ticket status pulldown, you might want to select “Feature Request Approved” and “Feature Request Not Approved” as possible next steps.

When the ticket is opened, and the user goes to change the status, only the statuses which are available as the next statuses will be displayed.

We realize that these are potentially complex topics, but they are some of the most powerful features within TeamSupport. We encourage you to call our support team if you have any questions or would like to get some customized administrator training.
Email Integration – Advanced

How it works – High Level:

When your customer (or anyone) sends emails to your support@yourcompany.com address, it will create a new ticket. The sender will get an auto reply confirming receipt, and your team will get an email letting them know a new ticket has been created, by who, and what they had to say.

When your customer or team members get the confirmation email, the Ticket number will be in brackets in the subject line. This is how we know which ticket to update when someone replies to the email. When someone replies to these confirmation/update emails generated from your account, their reply will be added as a new Action on the ticket in question.

Setup

To setup the Email integration, you will need to go to the Admin -> Email tab.

Simply forward your companies support address (or another departmental/group email address) to the “System Email Address” in your account shown in the screenshot below. When emails are received, they will either create new tickets, or update existing tickets.

Forwarding is typically done by having your IT Manager add an “Email Forwarder” at the hosting level of your email/website account. If you use Outlook/Exchange Server, or similar technology, you will want to setup “Message Redirection” so that the email simply gets sent on to the TeamSupport address without any manipulation.

Place your company address that you forwarded into the “Organization Reply To Address”. That way, when TeamSupport sends emails, it will insert your address on the FROM line and complete the loop.

If you would like to know the basic requirements for setting up email integration, read this first.
Other Considerations

Tagging Emails

- **[Ticket Number]** – When TeamSupport sends emails about a ticket, it will include the ticket name and the ticket number in brackets on the subject line. As long as the ticket number in brackets remain in the subject line – when you or your customer replies to that email, it will add their email as a new action/comment to the ticket.

- **[PVT]** – If you want to send an email to an existing ticket but you want it to be private – meaning your customer will not get an update email as a result of your update, simply add [pvt] to the subject line or anywhere inside the body of the email.

- **[CLOSED]** – If you want to close a ticket with an email, add the keyword [closed] to the subject line or anywhere inside the body of the email.

Attachments

E-mail attachments are automatically extracted from the e-mail and added as attachments to the ticket actions. If you add an attachment to a ticket action, and the ticket is visible to customers, the email your end user receives will contain both your message and the attached file(s) in the action.

Emails that go out to your customers

Emails are sent to your customers when tickets and actions are marked “visible to customers”. These emails run on a 2 minute timer – which starts 2 minutes after the last change was made to the ticket. This allows you to make various changes and avoid sending your customer multiple updates.

When you change the status of a ticket, an email is sent (this is an on/off switch under Admin->My Company). When you add an action that is visible to customers, an email is sent.

You will notice when looking at the actions a Private/Public flag. You can toggle this flag to mark the action visible to customers without having to edit the action.
Related Topics

• **Additional Email Settings**: There are additional settings in the Admin section that control email behavior.

• **Customizing E-Mails**: All outgoing e-mails in TeamSupport can be customized by changing the e-mail templates.

• **Routing E-Mails from a Customer to a Specific User or Group**: You can route tickets created by an end user to a specific TeamSupport Group or User.

• **Alternate Email Dropbox**: You have the option to add additional email “dropboxes” which will route emails into your TeamSupport account.

• **Changing the Ticket Status When a Customer Responds**: You can set up TeamSupport so that the status of a ticket changes when a customer responds to it.
Email Settings

To setup emails, click on the Admin tab from your left-hand navigation, then click the Email tab.

System Email Address: 4193e8a3f8f2c-4dd0-abad6-29a9d88b9157@nail.teamsupport.com
This is your company's dropbox account. We recommend you forward your TeamSupport account this address and make sure you share it with the rest of your team. Forward any email to your dropbox and TeamSupport will either create a new ticket or update an existing ticket. If the email comes from your customer and we know who they are in TeamSupport, we will associate that contact to the ticket and include any attachments. BCC or CC your dropbox when you send an email and include the ticket number in brackets on the subject line and the email will be attached to that ticket.

Organization Reply to Address
support@bitsandbytessoftware.co
Enter your company's support address here. This way when TeamSupport sends emails to your customers, your address will be on the FROM line.

Default Group Assignment
Customer Service
The group in your account where customer email submissions will be assigned initially.

- Require [New] keyword for emails
In some cases, our customers do not want tickets created via email from their end users, or potential spam mail creating tickets. Setting this ON will only create a new ticket from email if we see [new] in the subject line. The majority of our customers leave this OFF.

- Mask Outbound email on the From line to use TeamSupport user's Alias on public action updates
When enabled and a user adds a public action to a ticket, this setting will modify the "From" line that the contact will see in the email inbox to append the user's Alias in front of your system email address.

- Require a known email address for emails
This setting will only allow emails into the system if we know who the sender is - be it a internal TeamSupport user or anyone else. As above, the majority of our customers leave this OFF.

- Auto Change Status of a Closed Ticket
When a Ticket is Closed and your Customer updates the ticket via an email, the status of the ticket will change to what you have set as the "email response" status (see here for more about ticket statuses). If you do not want the status of the ticket to change under this scenario, uncheck this setting.

- Associate additional people to ticket
Automatically associate additional people who are on the To and CC lines of an email to the ticket.

- Mark emails that are identified as Spam
Automatically mark emails identified as spam.

- Match subject to existing tickets.
Attempt to match e-mail subject to existing ticket

- Force Emails on BCC line to be private.
If an email is sent to your TeamSupport dropbox address on the BCC line, this option will force the ticket and/or action to be private.

- Restrict customer email updates.
Only allow customers who are associated with a ticket to update it via email.

- Use alternate email addresses to reply to tickets.
When emails are received via an Alternate Email address, use the alternate email as the Reply To when sending emails about the ticket.

- Allow private actions to update 'Email Response' Status
When a *Private* ticket update is received via email, the status of the ticket will change to what you have set as the "email response" status when this setting is turned on.

Field Definitions

- System Email: This is your company's dropbox account. We recommend you forward your
company’s support address to this address and make sure you share it with the rest of your team. Forward any email to your dropbox and TeamSupport will either create a new ticket or update an existing ticket. If the email comes from your customer and we know who they are in TeamSupport, we will associate that contact to the ticket and include any attachments. BCC or CC your dropbox when you send an email and include the ticket number in brackets on the subject line and the email will be attached to that ticket.

Forwarding is typically done by having your IT Manager add an “Email Forwarder” at the hosting level of your email/website account. If you use Outlook/Exchange Server, or similar technology, you will want to setup “Message Redirection” so that the email simply gets sent on to the TeamSupport address without any manipulation.

- **Organization Reply To Address:** Once you have forwarded your company’s support address to your drop box, insert your company’s support address here. This way, when your TeamSupport account sends emails to your customers, the FROM line will be your support address as opposed to the system email address.
- **Default Group Assignment:** This field contains the group in your account where customer email submissions will be assigned initially. Additionally, for our existing customers who use Classic Portal, this setting serves as the default group for tickets coming from the Classic Portals.
- **Require [New] keyword for emails:** In some cases, our customers do not want tickets created via email from their end users – or potential spam mail creating tickets. Setting this ON will only create a new ticket from email if we see [new] in the subject line. The majority of our customers leave this OFF.
- **Mask Outbound email on the From line to use TeamSupport user’s Alias on public action updates:** When enabled and a user adds a public action to a ticket, this setting will modify the “From” line that the contact will see in the email inbox to append the user’s Alias in front of your system email address.
- **Require a known email address for emails:** This setting will only allow emails into the system if we know who the sender is – be it an internal TeamSupport user or anyone else. As above, the majority of our customers leave this OFF.
- **Auto Change Status of a Closed Ticket:** When a Ticket is Closed and your Customer updates the ticket via an email, the status of the ticket will change to what you have set as the “email response” status (see here for more about ticket status). If you do not want the status of the ticket to change under this scenario, uncheck this setting.
- **Associate additional people to ticket:** Automatically associate additional people who are on the To and CC lines of an email to the ticket. Once they are attached to the ticket (you will see them in the Associations-Customer section of the ticket) they will be updated whenever a visible action is added to the ticket (see Web Conversations for more detail on this). If the additional users on the To or CC lines do not exist in the Customer database, they will be added automatically.
- **Mark emails that are identified as Spam:** Default is unchecked. If checked, the system will automatically mark emails identified as spam by appending [SpamMessage] to the message title. Therefore, [SpamMessage] will also appear on the Ticket Name. If you would like to take action on
messages marked as spam, you may do so with Ticket Automation. For example, a Ticket Automation Trigger could search Ticket Name for “SpamMessage” (without brackets) and change the status to “Closed – Junk”.

- **Match subject to existing tickets:** Please note that if this behavior causes a problem simply turn it off as it is not for every customer. The preferred method of e-mail exchange within TeamSupport is to use Web Conversations. However, we realize that e-mail exchanges with customers are not always this clean, and sometimes it is necessary to just cc an e-mail conversation into your TeamSupport drop box. This can create a problem since then any time someone does a “Reply All” to the e-mail thread a new ticket will be created in TeamSupport because the ticket number does not exist in the subject line. TeamSupport attempts to solve this by looking at the subject line of the e-mail. If the subject of the e-mail matches an existing and open ticket in your organization, then TeamSupport will associate the incoming e-mail with that ticket.

How does it work?

If an e-mail comes into the drop box that does not have a ticket number in brackets, we will search the company’s tickets and see if there is a ticket with the same subject as the e-mail. If we find one, then we will add the body of the e-mail as an action instead of creating a new ticket.

To prevent us unintentionally adding an e-mail to an incorrect ticket, we look for several things:

1. The ticket must not have a ticket number in brackets.
2. The subject of the ticket must match exactly with the title of an existing ticket. Note that we do remove “Re:”, “Fwd:”, and a few other common things in e-mail subjects.
3. The ticket that we are associating the e-mail with must have been modified within the last 10 days. The theory here is that any ticket that has an ongoing e-mail conversation is most likely new.
4. We will only attempt to match to open tickets – We will not automatically associate an e-mail with a closed ticket based on a subject match.
5. We will only associate an action to the ticket if the person who sent the email is already listed as a “Customer” in the ticket. This will prevent matching from different customers and potential data leakage.

- **Force Emails on BCC line to be private:** If an email is sent to your TeamSupport dropbox address on the BCC line, this option will force the ticket and/or action to be private.
- **Restrict customer email updates:** Only allow customers who are associated with a ticket to update it via email.
- **Use alternate email addresses to reply to tickets:** When emails are received via an Alternate Email address, use the alternate email as the Reply To when sending emails about the ticket.
- **Allow private actions to update ‘Email Response’ Status:** This option causes private ticket updates received via email to change the ticket status to the "email response" status (if applicable). If email response status is not defined, no status change will be made. One way a ticket update received via email may be private is if the [PVT] keyword is used in the email.
Related Topics

- **Email Integration Setup**: Setting up your system to receive emails takes only a few easy steps.
- **Customizing E-Mails**: All outgoing e-mails in TeamSupport can be customized by changing the e-mail templates.
- **Routing E-Mails from a Customer to a Specific User or Group**: You can route tickets created by an end user to a specific TeamSupport Group or User.
- **Alternate Email Dropbox**: You have the option to add additional email "dropboxes" which will route emails into your TeamSupport account.
- **Changing the Ticket Status When a Customer Responds**: You can set up TeamSupport so that the status of a ticket changes when a customer responds to it.
Alternate Emails

To setup emails, go to ADMIN -> Email tab.

The alternate email feature is designed to allow multiple company email addresses to be forwarded and routed to your TeamSupport account. You can have the tickets associated with a certain group, product (enterprise edition only), and type of ticket to be created (issues, bugs, features, etc).

You can also setup other automation rules that can handle routing of tickets as well. See here for more info about automation.

If your company has multiple support/department/distribution email addresses, you can add those in the “Alternate Emails” section. These may be addresses like “level1support@mycompany.com”, or “escalation_team@mycompany.com”.

Click the “+ Add” button on the top right of the Alternate email section to create a new alternate email. Here is the form you will see.

![New Alternate Email Form](image)

It is important to add a Description to help identify what the alternate address is used for. It is also important to put the email address which emails will be sent to in the Sending Email Address field. This is needed in order to avoid email loops. Optionally, you can assign a group that you would like the tickets to be associated with, choose the type of ticket to be created, and pick a product. If you do not want to define any
one of these, simply leave them set to unassigned.

If you choose to route an Alternate Email Address to a Product, we also recommend adding this email address as the "[...]. This allows your Alternate Email Address to be used for agent entry tickets. When an agent creates a ticket manually and adds a Product to the ticket, the corresponding Email Reply To Address will be used on the outgoing emails for that ticket. If a Product is changed on a ticket, the Reply to Address will not change. For example, if a customer sends into Alternate Email ProductABC@yourcompany.com which routes to ProductABC, and the Product on the ticket gets changed to ProductXYZ, the reply to email address will remain at ProductABC@yourcompany.com.

Once you are done, you will see a alternate system email address as highlighted in the grid below. Simply forward the address from the “sending email address” to it’s corresponding alternate system email address.

If you would like to edit the description, group, ticket type, product, or sending email address after you have created these accounts, just click the “pencil” icon on the far left.

If you would like your alternate email address to be used as the “Reply To” Address, you must check this box which can be found under Admin->Email->Email Settings:

![Use alternate email addresses to reply to tickets.](image)

When emails are received via an Alternate Email address, use the alternate email as the Reply To when sending emails about the ticket.

If this box is unchecked, the email addressed listed in the “Organization Reply To” address will be used for all outgoing emails.
Email Templates

Every email that is sent out of TeamSupport has a template associated to it. You are able to customize each template to meet the needs of your organization. Your account has been pre-configured with default settings for your convenience.

Global Templates Definitions

There are two templates you can edit that will impact all other templates color/look/feel wise.

- **Global Email Template** – This is the master template regarding the colors and font styles. To edit the code for the Email Template, simply type right into the body space and click save when you are done.
- **Ticket Actions Template** – This template allows you to further define the actual comments that appear within the emails that contain the placeholder `{{Actions}}`.

Additional Template Definitions

**Enterprise Edition Only Templates:**

- **Task – Reminder**: This is the email the Task owner will receive as a reminder for their Task.
- **Task – Update**: This is the email the Task owner will receive when their Task gets updated.
- **Task – Assigned**: This is the email the Task owner will receive when a Task gets assigned to them.
- **Task – Completed**: This is the email the Task creator or owner will receive when a Task has been completed.
- **Task – Old Owner**: This is the email the previous Task owner will receive when their Task is assigned to someone else.

**Support Desk Edition Only Templates:**

- **Reminder – Ticket**: This is the email the user will receive for a Ticket Reminder.
- **Reminder – Customer**: This is the email the user will receive for a Customer Reminder.
- **Reminder – Contact**: This is the email the user will receive for a Contact Reminder.

**Templates for Both Editions:**

- **New Ticket Confirmation**: This is the confirmation email a customer receives after creating a ticket on the [Classic Public Portal](#).
- **New Ticket Confirmation – Advanced Portal**: This is the confirmation email a customer receives after creating a ticket in the [Classic Advanced Portal](#) or the [Customer Hub](#).
- **New Ticket Confirmation – Internal**: This is the confirmation email a TeamSupport user receives after creating a ticket via email.
- **Ticket Assignment – User**: This is the email a TeamSupport user receives after a ticket is manually or automatically assigned to them.
• **Ticket Assignment – Group**: This is the email a TeamSupport user receives when a ticket with an unassigned user is assigned to a group to which they are a member. This feature is controllable via user settings.

• **Ticket Update – User**: This is the email a TeamSupport user receives when a ticket is modified. This email will be sent to the assigned user, and all subscribed users, when the following occurs by any other user or a customer:
  - Private and/or public actions are created
  - Severity update
  - Status update

  We recommend using the {{Changes}} placeholder in this email template. This placeholder will indicate that the severity was updated and will include the new severity.

• **Ticket Update – Basic Portal**: This is the email a Classic Public Portal and non Customer Hub users receives when a ticket is modified.

• **Ticket Update – Advanced Portal**: This is the email Classic Advanced Portal and Customer Hub users receives when a public action is added to a ticket, or (optionally) when the status is updated. The latter is controlled by an admin setting called “Disable ticket status update emails”.

• **Ticket Closed**: This is the email a customer will receive when a ticket is set with a status that has the “Send Closed Email” option checked.

• **Ticket Update Request**: The user assigned to the ticket gets this email when an Update Request is issued.

• **Ticket Email**: This is the email a ticket owner will receive when a Email Ticket request is issued.

• **SLA – Violation**: This is the email sent when a ticket violates an SLA.

• **SLA – Warning**: This is the email sent when a ticket goes into warning state for an SLA.

• **Welcome User – Portal**: This email welcomes a new Classic Portal user.

• **Changed Password – Portal**: This is the email a Classic Portal user receives after they successfully reset their password.

• **Reset Password – Customer Hub**: This is the email a Customer Hub user receives when their password is reset.

• **Welcome User – Customer Hub**: This email welcomes a new Customer Hub user.

• **Reset Password – Portal**: This is the email a Classic Portal user receives when their password is reset.

• **Scheduled Report**: This is the email received when the scheduled report is processed and sent.

• **Applause Reaction Notification**: This is the email a person will receive when their post receives a reaction.

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**Customizing Templates**

Clicking the combo box will show you a list of every email template that exists in TeamSupport. Select the template you would like to customize and edit/save your changes.

You may specify an Email Template to be used by specific Product Lines by selecting the Product Line from the drop down menu. This is a very powerful option in order to customize your Email Templates based on
the Product selection made on a ticket. An example use for this feature would be to put Product Line specific logos on outgoing emails from TeamSupport. First, your Product Lines and Products need to be setup. Next, create your Product Line specific Email Templates. Finally, when a Product is selected on a ticket, the corresponding Email Template will be used.

To configure a Email Template for a Product Line, simply select the Product Line from the drop down menu. You are now working on that Product Line specific Template. Be sure to save any changes you make by clicking the save button as outlined below.

Once you have selected your template and customized the code, you can click the Preview link to see what your template will look like. To make additional edits, just click the Edit link.
Placeholders

Available Placeholders

You can re-order place holders, add and remove them as needed. Do not edit the text inside of them however. Example: Do not change {{Action.Description}} to {{Text.Description}}

Miscellaneous

- {{Body}} - This is where the main content will be placed from the other email templates.
- {{Header}} - This is where the text entered in the Header field of other templates will be placed.
- {{Footer}} - This is where the text entered in the Footer field of other templates will be placed.
- {{ToEmailAddress}} - This adds the recipient's email address.
- {{ToFirstName}} - This adds the recipient's first name.
- {{ToLastName}} - This adds the recipient's last name.

MyCompany

Your company's information

- {{MyCompany.CreatedBy}}
- {{MyCompany.Description}}
- {{MyCompany.IsActive}}
- {{MyCompany.Name}}
- {{MyCompany.CreatorID}}
- {{MyCompany.CustDistIndex}}
- {{MyCompany.CustDistIndexTrend}}
- {{MyCompany.OrganizationID}}

Use placeholders to easily insert frequently used information into your text. For example, you may want to insert your company name into your emails. Simply add the {{MyCompany.Name}} into a given template to add this.

You can re-order place holders, add and remove them as needed. **Do not edit the text inside of them however.** Example: Do not change {{Action.Description}} to {{Text.Description}}

You can also personalize your emails using the placeholders. Some examples are:

- {{Ticket.Status}}
- {{Ticket.Severity}}
- {{Ticket.CreatorName}}
- {{Ticket.DateCreated}}

There are many placeholders that will be updated according to the email template that you choose.

The placeholders will be replaced with the correct values when the email is sent.
3rd Party Integrations and API

TeamSupport has native integrations with many leading software providers – These pre-built integrations means it’s very simple to get TeamSupport talking with other business systems.

For integrating with internal systems, we also offer a “Rest” based API.

Browse this section for details these and other integrations.
The TeamSupport API is a RESTful style API over HTTP using XML or JSON. Each object (Tickets, Customers, Products, Jira, etc…) in TeamSupport is treated as a resource. You can use four verbs (GET, POST, PUT, DELETE) to manipulate the data.

**API Topics**

- Below on this page:
  - API Authentication
  - API Verbs
  - Appending .xml
  - Uploading Attachments
- API URL Examples
- Sample code written in C# and PHP
- Customer API: Allows your customers to access their data within your account by giving them their Customer API Token.
- API filtering
- API Pagination

**Authentication**

To gain access to your data, you must get authenticated. TeamSupport uses HTTP Basic Authentication over SSL to secure your data. **You will use your OrganizationID for your username, and your authentication token as your password.** Your authentication token allows access to your data, so be sure to keep it very secure.

Locate your OrgID: Go to Admin, My Company tab.
Locate your API Token: Go to Admin, Integration tab and expand the top selection labeled TeamSupport API.

An easy way to test your calls is to use a HTTP client such as Fiddler, hurl.it, or cURL. You can even test the GET verb with a standard web browser.

**Verbs**

The URL examples below contain a [ServerName] placeholder. This needs to be replaced with your Server Name, or removed if your URL does not contain a server name. **How do I find my URL?**
GET (Retrieve)

The GET verb allows you to retrieve the data. For example:

Use the following url with the GET verb to retrieve all of your customers:
https://app.[ServerName].teamsupport.com/api/xml/customers OR
https://app.[ServerName].teamsupport.com/api/json/customers

Use the following url with the GET verb to retrieve a single customer with the CustomerID of 123:
https://app.[ServerName].teamsupport.com/api/xml/customers/123 OR
https://app.[ServerName].teamsupport.com/api/json/customers/123

Use the following url with the GET verb to retrieve the Ticket Status IDs:
https://app.[ServerName].teamsupport.com/api/xml/properties/ticketstatuses OR
https://app.[ServerName].teamsupport.com/api/json/properties/ticketstatuses

POST (Insert or Create)

The POST verb will allow you create resources. For example, use the following URL with the POST verb to create a new customer:

https://app.[ServerName].teamsupport.com/api/xml/customers OR
https://app.[ServerName].teamsupport.com/api/json/customers

• The Body of the request (for POST and PUT verbs) needs to be formatted in either XML or JSON. The request must include the parent tag and all the required tags. Here is an example in XML:

```xml
<Customer>
    <Name>John Doe Company</Name>
</Customer>
```

Here is an example in JSON:

```json
{
    "Ticket": {
        "Name": "Testing add ticket with JSON",
        "TicketStatusID": "28746",
        "TicketTypeID": "6080",
        "TicketSeverityID": "6109"
    }
}
```
• If there are no required tags, an empty ID tag will be required to parse the request file successfully. Here is an example in XML:

```
<Table>
    <TableID/></TableID>
</Table>
```

• The request also may include any other relevant tags for the new record, including custom fields. If an invalid tag or a read-only tag are included they will be ignored without preventing the request to take effect. To update a read-only field the related field needs to be updated instead. Here is an example in XML:

```
<Customer>
    <Name>John Doe Company</Name>
    <Website>www.3TestCustomer.com</Website>
    <FirstCustomField>This is the value for the custom field with the API field name "FirstCustomField"</FirstCustomField>
</Customer>
```

• To update the value of the `<PrimaryContact>` the corresponding value needs to be specified in the `<PrimaryUserID>` tag.

• DateTime fields values need to be provided in UTC time, nevertheless they will be returned in the local time specified for the organization.

• The only required field to create a ticket is the `<TicketStatusID>`. For Example:

```
<ticket>
    <TicketStatusID>28732</TicketStatusID>
    <TicketTypeID>6077</TicketTypeID>
    <Name>A Ticket added from API</Name>
</ticket>
```

• We define the ticket description as a ticket action. When you create a ticket an empty description is created. You can get the ID of the new empty description created using the following URL.

"Tickets/{TicketID}/Actions" or "Tickets/{TicketName}/Actions"
A description is a ticket action with a SystemActionTypeID equal to 1. To give a value to the new empty description, call the following URL using the PUT verb:

"Tickets/{TicketID}/Actions/{ActionID}" or "Tickets/{TicketNumber}/Actions/{ActionID}"

The content of the description must be placed in the “Description” tag. For example:

```
<Action>
  <Description>
  This is the content of the new ticket description.
  </Description>
</Action>
```

**PUT (Update)**

The PUT verb is much like the POST, except that it updates an existing resource instead of creating a new one. You will need to put the XML in the body of the request. An easy way to see the format, is to use the GET verb to request a resource.

https://app.[ServerName].teamsupport.com/api/xml/customers/123

**DELETE**

The DELETE verb is pretty much straightforward. You issue an HTTP request upon a resource, and that resource will be deleted. In the following example Customer 456’s association with ticket 123 will be deleted.

Tickets/123/Customer/456

**Additional Notes**

- You also have an option of appending "\.xml" to the resource. This might be useful for some clients to display the proper XML format. When you receive a response back from your request, the Status Code is very meaningful. The Status Code determines the success of the request. For example: https://app..[ServerName].teamsupport.com/api/xml/customers.xml

Some common codes are as follows:
200 Successful
201 Created
202 Accepted
300 Redirection
304 Not Modified
401 Unauthorized
403 Forbidden
404 Not Found
405 Method Not Allowed
500 Server Error
501 Not Implemented

• The XML also may include any other relevant tags for the new record, including custom fields. For example:

```
<Customer>
  <Name>John Doe Company</Name>
  <Website>www.3TestCustomer.com</Website>
  <FirstCustomField>This is the value for the custom field with the API field name "FirstCustomField"</FirstCustomField>
</Customer>
```

• The custom fields that you create will be available like any other property of a resource in TeamSupport. You can modify the property name when you create or edit your custom fields (Admin>Custom Fields). When modifying your custom fields, you will notice a value “API Field Name”. This value will determine the element name in your XML.

**Attachments**

You may upload attachments to Ticket Actions and Inventory Assets. We have supplied sample code [here](#).
How do I find my URL?

The easiest way to find your URL is by locating your “Welcome to TeamSupport” email which was sent to you when your account was created.

Be sure to bookmark your URL to make finding it easier. If you have misplaced your URL and cannot locate your “Welcome to TeamSupport” email, you may contact support@teamsupport.com so that we can retrieve it for you.

Here is information about our [ServerName]:

- If you were a customer before March 15, 2016, you do not have a server name in your URL. Your URL is app.teamsupport.com.

- If you became a customer after March 15, 2016, your URL contains a Server Name. For example: app.na2.teamsupport.com is a valid TeamSupport URL, where na2 is the server name (North American 2). Please follow the instructions at the top of this page if you have misplaced your URL.
Here is sample code written in C# to create a Company.

```csharp
using System;
using System.IO;
using System.Net;
using System.Text;
using System.Xml;
namespace TeamSupport.Api.Consumer
{
    class Program
    {
        static void Main(string[] args)
        {
            // Create a company
            string URI = "https://app.[ServerName].teamsupport.com/api/xml/customers";
            HttpWebRequest request = (HttpWebRequest)WebRequest.Create(URI);
            string organizationID = "{Your organization ID}";
            string apiToken = "{Your API Token}";
            string credentials = string.Format("{0}:{1}", organizationID, apiToken);
            Byte[] credentialsByteArray = UTF8Encoding.UTF8.GetBytes(credentials);
            request.Headers.Add("Authorization", "Basic " + Convert.ToBase64String(credentialsByteArray));
            request.Method = "POST";
            request.ContentType = "application/xml";
            request.UserAgent = "your organization name";
            MemoryStream stream = new MemoryStream();
            XmlTextWriter writer = new XmlTextWriter(stream, new UTF8Encoding(false));
            writer.Formatting = Formatting.Indented;
            writer.WriteStartElement("Customer");
            writer.WriteElementString("Name", "Second Company, Inc.");
            writer.WriteElementString("Website", "www.secondcompany.com");
            writer.WriteElementString("Customercustomfield1", "CustomField1Value");
            writer.WriteFullEndElement();
            writer.Flush();
            stream.Position = 0;
            StreamReader reader = new StreamReader(stream);
            string body = reader.ReadToEnd();
            Byte[] bodyByteArray = UTF8Encoding.UTF8.GetBytes(body);
            int offSet = 0;
            int count = bodyByteArray.Length;
            using (Stream requestStream = request.GetRequestStream())
            {
                requestStream.Write(bodyByteArray, offSet, count);
            }
        }
    }
}
```

The URL examples below contain a [ServerName] placeholder. This needs to be replaced with your Server Name, or removed if your URL does not contain a server name. How do I find my URL?
Here is sample code written in PHPT to create a ticket.

```php
<?php
/* CREATE TICKET */
$orgID='ORGANIZATION_ID';
$apiToken ='Your_API_KEY';
$input_xml="<Ticket>
    <TicketStatusID>28730</TicketStatusID>
    <TicketTypeID>13237</TicketTypeID>
    <TicketTypeName>Support</TicketTypeName>
    <Name>Title goes here</Name>
    <Description>This is the content of the new ticket description.</Description>
    <Status>New</Status>
</Ticket>";
$host="https://app.[ServerName].teamsupport.com/api/xml/Tickets";
$base64str=base64_encode("$orgID:$apiToken");
$process = curl_init();
curl_setopt( $process, CURLOPT_URL, $host );
curl_setopt( $process, CURLOPT_POST, true );
curl_setopt($process, CURLOPT_HTTPHEADER,array('Content-Type: application/xml', 'Authorization: Basic '.$base64str));
curl_setopt($process, CURLOPT_TIMEOUT, 30);
curl_setopt($process, CURLOPT_POSTFIELDS, $input_xml);
curl_setopt($process, CURLOPT_RETURNTRANSFER, TRUE);
$return = curl_exec($process);
$response = curl_getinfo( $process );
curl_close($process);
print_r($return);
```

Here is sample code written in C# to upload an attachment to a Ticket Action or Inventory Asset:

```csharp
using System;
using System.Collections.Specialized;
using System.IO;
using System.Text;
using System.Net;

namespace Tests
{
    class Program
    {
        static void Main(string[] args)
        {
            //****
            //example of API url to upload attachment file to an Acti
```
on. Replace values appropriately.

```csharp
string URI = "https://app.teamsupport.com/api/xml/Tickets/{ticketId}/Actions/{actionId}/Attachments"; //Use correct values here
HttpWebRequest request = (HttpWebRequest)WebRequest.Create(URI);
string organizationID = "{organizationId}"; //Use correct values here
string apiToken = "{apiToken}"; //Use correct values here
string credentials = string.Format("{0}:{1}", organizationID, apiToken);
Byte[] credentialsByteArray = UTF8Encoding.UTF8.GetBytes(credentials);
string encodedCredentials = Convert.ToBase64String(credentialsByteArray);
string boundary = "---------------------------" + DateTime.Now.Ticks.ToString("x");
request.Headers.Add("Authorization", "Basic " + encodedCredentials);
request.Method = "POST";
request.ContentType = "multipart/form-data; boundary=" + boundary;
request.Accept = "text/html, application/xhtml+xml, */*";
request.Headers.Add(HttpRequestHeader.AcceptEncoding, "gzip, deflate");
MemoryStream stream = new MemoryStream();
string FilePath = "{fileToUploadPath}"; //Use correct values here
Stream postDataStream = GetPostStream(FilePath, boundary);
request.ContentLength = postDataStream.Length;
Stream reqStream = request.GetRequestStream();
postDataStream.Position = 0;
byte[] buffer = new byte[1024];
int bytesRead = 0;
while ((bytesRead = postDataStream.Read(buffer, 0, buffer.Length)) != 0)
{
    reqStream.Write(buffer, 0, bytesRead);
}
postDataStream.Close();
reqStream.Close();
StreamReader sr = new StreamReader(request.GetResponseStream());
string Result = sr.ReadToEnd();
}
private static Stream GetPostStream(string filePath, string boundary)
{
    Stream postDataStream = new System.IO.MemoryStream();
    FileInfo fileInfo = new FileInfo(filePath);
    string fileHeaderTemplate = "--" + boundary + Environment.NewLine + "Content-Disposition: form-data; name=" + "fileToUploadPath" + "; filename=" + fileName + ""
    Stream reqStream = request.GetRequestStream();
    postDataStream.Position = 0;
    byte[] buffer = new byte[1024];
    int bytesRead = 0;
    while ((bytesRead = postDataStream.Read(buffer, 0, buffer.Length)) != 0)
    {
        reqStream.Write(buffer, 0, bytesRead);
    }
    postDataStream.Close();
    reqStream.Close();
    StreamReader sr = new StreamReader(request.GetResponseStream());
    string Result = sr.ReadToEnd();
```
Here is sample code written in XML to return Ticket Assignment History.

```xml
<TicketAssignments>
  <TotalRecords>{the number of records here}</TotalRecords>
  <Tickets>
    <TicketId>{ticketId here}</TicketId>
    <TicketNumber>{ticket number here}</TicketNumber>
    <UserAssignmentHistory>
      <Assignment>
        <UserID>{userid}</UserID>
        <UserName>{user name}</UserName>
        <DateAssigned>{date when the ticket was assigned to this user}</DateAssigned>
      </Assignment>
      ...etc, one Assignment block per ticket history assignment...
    </UserAssignmentHistory>
  </Tickets>
  <Tickets>
    ...etc, one Tickets block per ticket...
  </Tickets>
</TicketAssignments>
```

Here is sample code written in json to return Ticket Assignment History.

```json
{
    "TicketAssignments": {
        "TotalRecords": "{the number of records here}"
    },
    "Tickets": [
```
Click [here](#) to learn more about our API.
API URLs

Download this spreadsheet.
Sample Code

Sample json and xml code can be found here.
Customer API

Customer API

You can allow your Customer to access their data within your account by giving them their Customer API Token that is found on their Customer record. Your customers can do things like access their ticket information, update tickets, and post new tickets. Here is a list of the API calls and tables that are available when using the Customer API Token.

GET

- Tickets
- Actions
- Products
- Versions
- ActionTypes
- PhoneTypes
- Product Version Statuses
- Ticket Severities
- Ticket Statuses
- Ticket Types

POST & PUT

- Tickets
- Actions

DELETE

- None

Pagination is also available for some of the above URLs.
**API Filtering**

- **Using Spaces and Special Characters**
  Any filter where you will need to use spaces or other special characters will need to be encoded. This means the code contained in this table will need to be used in place of the special character. For example, `%20` will be used in place of a space. The following example will find tickets with the name “Error Code 303”.

  Example: https://app.[ServerName].teamsupport.com/api/xml/Tickets?name=Error%20Code%20303

- **Filtering And Search**
  To filter results, use the query string in the URL. You can use any field name, including custom fields. For the name portion you use the field name and the value portion you use the value that you want the field contents to equal.

  Example: https://app.[ServerName].teamsupport.com/api/xml/Contacts?Email=jdoe@teamsupport.com

- **Filter with multiple fields**
  To filter using multiple fields, you may use a ampersand (&) in between fields.

  Example: https://app.[ServerName].teamsupport.com/api/xml/Contacts?FirstName=John&LastName=Doe

- **Filter with the same field more than once**
  This will return all the contacts with the first name of Jane or John.

  Example: https://app.[ServerName].teamsupport.com/api/xml/Contacts?FirstName=John&FirstName=Jane

- **Filter with date fields**
  All filters are set to equal the value that you specify, except for dates. Dates and times are handled differently. The dates that are returned are greater than the date specified in the filter. They also

*The URL examples below contain a [ServerName] placeholder. This needs to be replaced with your Server Name, or removed if your URL does not contain a server name. [How do I find my URL?]*
require a special format of YYYYMMDDHHMMSS. All 14 characters must be included, and the date must be UTC with a 24 hour format.

Example: https://app.[ServerName].teamsupport.com/api/xml/Tickets?DateModified=20100325154225

• **Filter Between Two Dates**
  The “between” filter allows you to return results that fall in between two dates. Exactly two date filter parameters must be passed. If additional date filter parameters are passed, the result will be that no date filter is applied. Both of the parameters must have the “between” keyword: [bt].


This will return the Tickets whose DateClosed is between ‘2017-01-01 10:20:33’ and ‘2018-06-01 10:20:33’

• **Filtering on Custom Fields**
  To include custom fields in the ticket results, you must include the filter for “TicketTypeID”.

Example: https://app.[ServerName].teamsupport.com/api/xml/Tickets?TicketTypeID=2010

• **Filter Options**
  Some types of fields have options when filtering, depending on the field’s data type.

  ◦ **String**: Strings use the keyword “contains”. The default for filtering a string, is an exact match of the value. If the “contains” option is used, the field only has include the value, not match it exactly.

    Example: https://app.[ServerName].teamsupport.com/api/xml/Contacts?Email[contains]=@teamsupport.com

  ◦ **Date**: Date also has only one option, and that is “lt”. When you use “lt”, all the results will be less than the filtered date, instead of greater than.

    Example: https://app.[ServerName].teamsupport.com/api/xml/Tickets?DateModified[lt]=20100325154225
• **Number:** Numbers have several options, but the default is equal to the value. They include Less Than ("lt"), Less Than or Equal ("lte"), Greater Than ("gt"), Greater Than or Equal ("gte"), Not equal ("not").


• **Null Values:** To check for a null value, use "[null]" for the value in the query string.

Example: https://app.[ServerName].teamsupport.com/api/xml/Customers?CRMLinkID=[null]

OR

https://app.[ServerName].teamsupport.com/api/xml/Customers?CRMLinkID[not]=[null]

• **Does not contain:** To filter out a phrase, you can use the "doesnotcontain" text filter. The following example will return all tickets where the name does not contain the word 'test'.

Example: https://app.[ServerName].teamsupport.com/api/xml/tickets?name[doesnotcontain]=test

• **Not:** Use the [not] filter (which is <> ) to find text or numbers that are not an exact match. The following example will return all tickets where the name is not exactly ‘test’.

Example: https://app.[ServerName].teamsupport.com/api/xml/tickets?name[not]=test
API Pagination

TeamSupport requests that pagination be used in all possible API calls. While it is optional today, pagination will soon be a requirement.

Paginating displays results separated into a discrete number of pages. This is necessary to avoid delays if large amounts of data is being accessed.

Pagination works with the following tables/urls:

**API**
- Tickets Table
- Contacts Table
- Customer Table URL: .../customers/{id}/tickets/
- Customer Table URL (for Zapier integration): .../zapier/customers/{id}/tickets/

**Customer API**
- Organizations Table
- Tickets Table URL .../tickets/

The following two parameters must be sent in the URL for pagination to work correctly.

- **pageSize**: Default value is 50. Specifies the maximum number of results returned per page. If there are not enough results to reach the maximum, then the exact number of results will be returned.
- **pageNumber**: Default value is 1. Specifies a specific page to return. For example, if you would like to view the 5th page of results, you would enter the value “5” for this field.

The results returned will include a TotalRecords element. With this, you can figure out how many pages there are based on the pagesize.

Example:

.../api/xml/tickets?name[contains]=Test&pageNumber=2&pageSize=40

This will return the second page of results. Each page will contain 40 records.

Let’s say the TotalRecords is 164. In this case, there will be 5 total pages. Pages 1-4 will have 40 records and page 5 with a remaining 4 records.

For convenience when using paginated API endpoints, the NextPage property can be utilized to obtain your next API call. If your initial API call were https://app.teamsupport.com/api/json/tickets?pageNumber=1&pageSize=5, the NextPage property will return the API call to retrieve the next set
of results as shown below:

"RecordsReturned": "5",
"TotalRecords": "1770"
Beanstalk

TeamSupport.com offers integration with BeanStalk, a hosted SVN source repository.

Once configured, when a new version is “committed” to BeanStalk, the tickets which that version addresses will have a new action associated with them that shows the version of software the ticket was addressed in, and a link to view the actual changes in code which happened in that version (note that you will have to have a BeanStalk account to view the code).

Codes in the Description Field
When you do a source commit, that information is sent from BeanStalk to TeamSupport. TeamSupport then parses the commit “description” text looking for certain keywords. The three keywords currently supported are “Tickets:“, “Version:“ and “Status:“.

The Tickets keyword is used to associate the code changes to a specific ticket within TeamSupport. The Status keyword lets you change the status of the tickets, and the Version keyword allows TeamSupport to associate the commit to a specific version.

The Tickets keyword looks like this:
[Tickets:342,345,123]

Note the square brackets and the colon. Multiple tickets can be associated with a given commit, and in this example there are three. Each ticket needs to be separated by a comma.

A Status keyword looks like this:
[Status:In QA, Closed, Needs Work]

A Status keyword can either have a single status which is applied to all tickets identified in the tickets command, or multiple statuses with each status relating to a particular ticket number. In this case, the status of QA would be applied to ticket 342, Closed to ticket 345, and Needs Work to ticket 123.

🌟 It’s important to understand that the status keywords need to match the name of the statuses you have defined in TeamSupport.
A version keyword should look like:
[Version:1.2a1]

Note the square brackets and the colon. In this case the version is “1.2a1” and will be associated with the commit.

BeanStalk Configuration

There is no configuration needed for TeamSupport, but there is a little on the BeanStalk side. Assuming you have a BeanStalk account and have already set up a repository, you will need to go to that repository’s setup.

From the dashboard when you log into BeanStalk, click on Repositories, then the Repository you want to configure, then click on the “Setup” tab, then on the integration link.

On the left hand side, click on “Web Hooks”. There will most likely be a message which says “Integration with Web hooks is disabled”. Click the “Activate” button right below this message.

You will then get a screen which asks you to specify the URL, or WebHook, you want to use.

The webhook you enter should look something like this:
http://integrate.teamsupport.com/beanstalkapp.aspx?
organizationid=xxxx&productid=yyy&RepositoryLocation=https://yourcompanyname.beanstalkapp.com/
yourproductname/changesets/

What do each of these mean?

1. integrate.teamsupport.com
   This is the URL of the service which communicates with BeanStalk. Whenever code is committed to BeanStalk, they send a message (called a “WebHook”) to this address and we process it.

2. OrganizationID=xxx
   This is your company’s organization ID within TeamSupport. You can find it in the My Account page and is typically a 4 to 5 digit number.

3. ProductID=yyy
   Each different repository in BeanStalk needs to be associated with a Product in TeamSupport. Each specific product in TeamSupport has a unique ProductID that goes with it. You can find this by going to Reports and selecting the “Product List”. This will list all of your products and their ProductIDs.

4. RepositoryLocation
   This field is optional, but when implemented is highly useful. This is the link to the Repository in BeanStalk which houses this product, and will allow you to click on a hyperlink in an action within the ticket to view the
source code in BeanStalk.

Typically the repository location will look something like:
https://CCCC.beanstalkapp.com/PPPP/changesets/

Where:

- CCCC will be your company name that you login to BeanStalk with. For example, if you go to “mycompany.beanstalkapp.com” to get to your repository, then use “mycompany” here.
- PPPP is your product name in BeanStalk.

The easiest way to get the value for RepositoryLocation is simply to go to BeanStalk and click on a repository “changeset”. Copy the URL, minus the number at the end, and paste that at the end of your webhook URL.

Please note that the trailing slash (“/”) should be included.
Once you have entered the WebHook, click “Confirm”, then review the WebHook and press the “Activate!” button.

If all went well, when you commit a new version of your code (and include tags in the description as detailed above) you will get actions added to the tickets. If something wasn’t set up correctly, the main contact for the BeanStalk repository will get an e-mail saying that the integration failed. Check the WebHook, and if it looks good then just give us a call.
Dropbox

If you have a Dropbox account, you can insert a direct link to any document into a ticket action.

Your customer will then be able to click the link from the email update they get, or from the Customer Hub and access the file.

I combed through their logs today. I think I might have found the issue. I'm going to call them again after their lunch hour.

Here is the log: actionlog.txt
Highrise

TeamSupport has native integration with 37 Signal’s Highrise CRM system so that company and contact information can be synced from Highrise to TeamSupport, and ticket information can be sent back to Highrise.

Setup:
Setting up the integration is very straightforward and only requires a couple of steps:

1. Log into your Highrise account and navigate to “My Info” in the upper right hand corner.

2. Click the “Reveal Authentication Token” link, then copy and paste the token which is displayed.

Note: The authentication token is unique to each user in Highrise. When the integration service adds a note with ticket information back to Highrise, it will tag that note with the name of the user whose authentication token is used. We suggest that you create a “TeamSupport” user in Highrise then use that user’s authentication token in TeamSupport.
3. Log into TeamSupport and navigate to the Admin section (note that you must have administrator privileges), then Integration. Expand the Highrise section – You should see a screen like the one below:

![Highrise Integration Screen](image)

4. In the “Authentication Token” section paste the Highrise authentication token from step 2, then paste it again into the “Confirm Authentication Token” text box.

5. When you log into Highrise, you have a company name which comes before the “highrisehq.com” URL. This company name is what you should enter into the “Highrise Company Name” box. For example, if your Highrise login is “http://ABC123.highrisehq.com” then you should enter “ABC123” (without the quote marks) into this field.

   (Important) Please make sure there are NO SPACES in this field!

6. The “Tag which identifies customer” field allows you to select the text you will use in Highrise to mark which companies are customers. Generally people use “Customer”, but you can change this to whatever you want. Please note that capitalization does matter here, so “customer” is not the same as “Customer”.

7. Check the “Sync Active” button. The first synchronization will start after 15 minutes. The next cycle will begin no sooner than 15 minutes. The timing of each subsequent cycle depends on it’s place in the queue, which is affected by the number of other items that require processing. Typically the timing of the cycles range from 15 – 60 minutes.
Give portal access to customers imported
Setting this option will automatically allow every imported contact to access your secure Customer Hub.

Send welcome email to imported contacts
When a new contact is added and given Customer Hub access, TeamSupport can automatically send each customer a welcome email that contains a link to your Hub, their user name and a temporary password. The Welcome email can be customized by editing the email templates here.

The Integration in Action

Once you’ve followed the steps above, your integration should be active. Now you can go into Highrise and tag a company with the name you entered in step 6 above. It will take about 15 minutes, but that customer – and all of their contact information, including people associated with that company – should come across to TeamSupport and be visible in the Customers section.

When you create a new ticket and associate it with a linked company, a note will appear in the Highrise account with a link to the ticket in TeamSupport.

A Few Integration Notes

There are a few things which are worth mentioning:

- Company and Contact information is only synced from Highrise to TeamSupport, not the other way around. If a change is made to a linked contact in TeamSupport, it will be wiped out the next time the integration service runs.
- You can only tag companies in Highrise with the TeamSupport customer tag (see step 6 above). If you tag a person with this tag, it will break the integration.
- The integration service will take a few minutes to update information. Please wait at least 15 minutes for data to propagate from Highrise to TeamSupport.

Fields we are mapping from Highrise:

Companies:
Name
Address
City
State
Zip
Country
Phone
Fax

Contacts:
Still Need Help?

As always, if you have any problems or need help with the integration, please give us a call or drop us a line!
HubSpot CRM

TeamSupport has a native integration with HubSpot CRM so can share information between the two systems.

Company and contact information can be pulled from your HubSpot account into your TeamSupport account, and ticket information can be sent back to HubSpot as Account Notes. This integration allows your company to use best of breed solutions for sales, marketing and contact management as well as customer service and support!

From within TeamSupport, browse to Admin->Integration Tab->HubSpot

Field Definitions

- Authentication Token: Password field to enter the HubSpot token to be used for the sync
- Confirm Authentication Token: Confirm the HubSpot token
- Synchronization Active: Check this box to turn on the integration
- Push-Out Tickets As Account Notes: Check this box to send tickets as Account notes in HubSpot.

Setup

In order to get the integration working between TeamSupport and HubSpot we need the token created in
HubSpot. Click [here](#) for the HubSpot help document that explains this process.

Your confirmation page should look similar to this:

![HubSpot API Key](image)

**Field Mapping for Customers**

* Only Customers/Contacts who are in “Customer” lifecycle state in HubSpot will be pulled into TeamSupport

Company information pulled/updated from HubSpot into TeamSupport:

- Name
- Address
- Address2
- City
- State
- Zip
- Country
Here is an example of the Customer record in HubSpot:

Here is an example of the Customer record in TeamSupport:
Field Mapping for Contacts

Contact information pulled/updated from HubSpot to TeamSupport:

- FirstName
- LastName
- Title
- MobilePhone
- Phone
- Fax
- Email

Here is an example of the Contact record in HubSpot:
Here is an example of the Contact record in TeamSupport:

Here is an example of the Ticket in TeamSupport:

Ticket pushed as Account Notes

When a new ticket is created in TeamSupport and is associated to a Company that exists in HubSpot, a HubSpot Account Note will be created containing the Ticket title and a Ticket URL link. When a Company/Contact is pushed into TeamSupport from HubSpot, we create an “integration link” between the systems for that account. TeamSupport will only push Tickets out to Account Notes for accounts that have been linked in this way. For example, if there was a ticket created for a Company that was created manually from within TeamSupport with a similar name as a Company that was brought in from HubSpot, an Account Note will not be created because the account does not have the “integration link”.

Here is an example of the Ticket in TeamSupport:
Here is an example of the HubSpot Account Note:

![Screenshot of HubSpot account note]

**Synchronization Notes**

- The first synchronization will start after 15 minutes. The next cycle will begin no sooner than 15 minutes. The timing of each subsequent cycle depends on it’s place in the queue, which is affected by the number of other items that require processing. Typically the timing of the cycles range from 15 – 60 minutes.
- The sync will update in TeamSupport any Companies or Contacts that have been updated in HubSpot since the last sync. Updates made in TeamSupport do not flow back into HubSpot. HubSpot is treated as the master record and will overwrite any changes that may have been made in TeamSupport.
- Only newly created tickets that are associated to a Company in TeamSupport will be sent to HubSpot as a Note to that company. This means the integration will not go back in time and push out tickets that were created before the synchronization was initialized.
High Level Overview

In TeamSupport we are focused on helping your organization provide the best customer & product support possible. If you are using Jira to keep track of bugs and projects and your support team have identified a problem that needs to be reviewed by your development team, the integration between the two products makes it very simple for your teams to collaborate and improve your customer’s experience.

How it Works

Here is a simple diagram of how the Jira integration works:
Additional details regarding the integration:

- **Linking Tickets to Issues:**
  - A single Issue in Jira can be linked with multiple Tickets in TeamSupport.
  - An Issue in Jira cannot create a Ticket in TeamSupport.
  - You may link a TeamSupport Ticket to a new or existing Jira Issue.
  - Existing and new Jira Issues can be linked to Tickets via the API. This could allow you to automate the Issue/Ticket link.

- **Initial “push” of Custom Mapped Fields:** When a New Issue is created, Default and Custom Mapped Fields are pushed from TeamSupport to Jira. This step does not happen when a Ticket is linked to a Existing Jira Issue. Future updates made within TeamSupport to Custom Mapped Fields are not sent to Jira.

- **Issue updates “pushed” to Ticket:** Any changes made to the Default and Custom Mapped fields in a Jira Issue will also be changed in the linked TeamSupport Ticket.

- **Actions and Comments are kept in-sync:**
  - Comments created in the Jira Issue will also be created in the linked TeamSupport Ticket as Actions. Updates to existing Comments will not be updated in the Action. A Comment can be made “private” by associating it to a “Project Role” from within the full Issue edit mode (not the popup). This will prevent the Comment from being sync’d to TeamSupport and can be useful for comments/communication that may be relevant for Jira users, but not TeamSupport users:
Actions created in the TeamSupport Ticket will also be created in the linked Jira Issue as Comments. Updates to existing Actions will not be updated in the Comment. You can push all TeamSupport Action types to Jira, or only one as defined in the setup instructions.

- **Product/Project Mapping**: This section explains how Product/Project Mapping is achieved.

## Setup

### Enable Issue Linking

The user specified in this integration must have permission to link issues. These permissions are established at two different levels in Jira. Issue linking must be enabled globally. To do or verify this take the following steps:

- Log in as a user with the Jira Administrators global permission.
- Choose > System. Select Issue Features > Issue Linking to open the Issue Linking page (Keyboard shortcut: g + g + start typing issue linking)
- Click the Activate button. The Issue Linking page reloads, stating that linking is enabled.

Once issue linking is enabled globally it also needs to be enabled for the specific user. To do or verify this the following steps need to be taken:

- Log in as a user with the Jira Administrators global permission.
- Choose > Issues. Select Permission Schemes to open the Permission Schemes page. (tick)Keyboard shortcut: g + g + start typing permission schemes
- For each permission scheme necessary click the Permission Scheme name. (For all the relevant projects to get the permission)
- Look down for the Link Issues permission and add or verify the user, its group or its role.
Field Definitions

Log into TeamSupport with an account that has Administrator rights and go to Admin->Integration->Jira

- **Instances**: If you have multiple Jira servers which you need to connect to, you can set them up each as a Jira Instance. Select a Jira Instance from the drop down menu, or click “Create” to create a new Jira Server instance. When using multiple Jira instances, a Product association is required in order for the instance to be correctly associated to the ticket when linking the Jira Issue. This is accomplished by indicating a Jira Project Key and a Jira Instance on the Product in the Product Section, and then ensuring that this Product is associated to the ticket when performing the sync.
**Instance Name:** Enter a name for this instance. This field is required. You may rename this field later, although the “Default” Jira instance cannot be renamed.

**Jira Host Name:** Enter your full Jira Host Name, including the protocol (http or https) and the port number if required. e.g. “https://atlassian.net”, “http://in-house.domain.com:8080”

**Jira User Name:** Enter the Jira username that will be used for our integration to access your account and create new issues, issue links and comments. This user must be able to create Issue Links.

- **For Jira Server (self-hosted) systems:** Be sure to use the username and not the email address. Although Google Users can log in their instance with their email addresses it is not possible to use a user’s email address to authenticate via API.
- **For Jira Cloud instances:** Be sure to use the full email address for proper authentication.

**Jira API Token/Confirm Jira API Token:** Required for Jira Cloud instances. Not Required for Jira Server (self-hosted) systems. An API token is used to authenticate your Jira Cloud account. The token is generated from your Jira account and is copied to these fields. Use these instructions to generate your token.

**Default Project KEY:** We sync the TeamSupport Product with the Jira Issue Project Key. When no product is assigned to a ticket and the ticket is linked with a New Issue, we use the Project Key specified in this field. Please notice that the match is made against the Project key instead of the Project Name.

**Action type to push to Jira as Comments:** Select the “All Types” option if all actions needs to be sent to Jira, otherwise, select the an Action Type from the list.

**Update TeamSupport Ticket Status:** If you need to update the TeamSupport ticket status whenever the Jira Issue Status is updated, check this option. It is very important that your Jira Status and TeamSupport Statuses are named the same, otherwise default values will be used. If this option is not checked an action in the TeamSupport ticket will be added whenever the Jira Issue Status gets updated.

**Synchronization Active:** Sets the Jira Instance to active.

**Always Use Default Project Key:** If you would like to always use the value you entered in the “Default Project Key” field, choose “Always Use Default Project Key”. Otherwise, we will use the Project/Product match.

**Include Non-Required Fields on Issue Creation:** If checked the mapped fields that are not required in Jira for the issue creation will be sent to Jira at initial sync (issue created from ticket). If unchecked, only the required fields will be used to create the issue and the rest of the mapped fields that are non required will not be sent.

**Use All Ticket Types:** If you would like to allow all Ticket Types to be sync’d with Jira, leave “All Ticket Types” checked. If you would like to limit the Ticket Types, uncheck this box and the select only the Ticket Types that you would like to be allowed to sync with Jira. The Jira box will only show up on
tickets that have the selected Ticket Types.

- **Custom Mappings**: You may add custom mapping fields that you want to bring over from the Jira Issues into the TeamSupport tickets. These include custom fields and Ticket Types from within your TeamSupport account.
- **Save**: Click the save button to save your changes.

### Field Mapping

> As a best practice, it is advised that you align your status naming in TeamSupport with corresponding fields in Jira. If the Jira and TeamSupport fields are not named exactly the same, default values will be selected.

### Default Field Mappings

<table>
<thead>
<tr>
<th>TeamSupport</th>
<th>Jira</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Type</td>
</tr>
<tr>
<td>Product</td>
<td>Project</td>
</tr>
<tr>
<td>Status</td>
<td>Status</td>
</tr>
</tbody>
</table>

### Custom Field Mappings

After you mark your synchronization as “Active”, your Custom Field Mappings will appear to the right of your other settings. These will allow you to map additional Ticket fields other than the defaults including Custom Fields and Ticket Types.

### Field Definitions

- **Mapping Type**: You may choose between “Ticket” and “Ticket Type”.
  - Choosing “Ticket” will allow you to map Standard and Custom Ticket fields found within TeamSupport.
  - Choosing “Ticket Type” will allow you to map your Ticket Types from TeamSupport to your
Issues Types in Jira. Mapping these fields will allow you to have the mapped relationship even if your Ticket Types and Issue Types are named differently.

- **Jira Field**: Enter the name for your Jira Field that you wish to map to the selected TeamSupport field.
- **TeamSupport Field**: Select the corresponding TeamSupport Field from the list
- **Add Mapping Button**: Click this button to add the mapping and the mappings will display below. The mapping can be deleted at any time by clicking the “x” to the right of the mapping as displayed in the image above.

## Jira Team Project/Version Mapping

The TeamSupport Product and/or Product Version maps to the Jira Project field. You may indicate a default Project KEY in the field definitions. You may also indicate a Project KEY in the TeamSupport Product and/or Version. When using multiple Jira instances, a Product association is required in order for the instance to be correctly associated to the ticket when linking the Jira Issue. This is accomplished by indicating a Jira Project Key and a Jira Instance on the Product in the Product Section, and then ensuring that this Product is associated to the ticket when performing the sync.

### Project/Version Mapping Logic

The Jira Project is mapped according to the following logic based on ticket fields/values:

1. If the field “Always Use Default Project Key” is defined, the “Default Project Key” value will be used in the Jira mapping for all tickets.
2. The ticket page has a field called “Reported Version”. If a Version is selected for this field, and that Version has a Project Key value defined, that value will be used in the Jira mapping for that ticket.
3. If the ticket has a Product selection and that Product has a Jira Project Key value defined, that value will be used in the Jira mapping for that ticket.
4. If the ticket has a Product selection, but that Product does not have a Jira Project Key value defined, the Product name will be mapped to the Jira Project Key for the Jira mapping for that ticket.
5. Finally, if the ticket being sent to Jira does not have a Product, and there is a Default Project Key value assigned, this value will be used in the Jira mapping for that ticket.

## Creating Jira links on Tickets

Once Jira and Product setup are complete, the final step is creating a link on a ticket. Click here for detailed instructions on how to link a ticket to Jira.
Logging and Troubleshooting

If your tickets are not syncing, you may look for errors in the “CRM Sync Errors” report which can be found in the Reporting Section. Additionally, logging reports can be found in the CRM Sync Logs report.

The first synchronization will start after 15 minutes. The next cycle will begin no sooner than 15 minutes. The timing of each subsequent cycle depends on it’s place in the queue, which is affected by the number of other items that require processing. Typically the timing of the cycles range from 15 – 60 minutes.

Additionally, Jira errors may be logged in the Ticket History. Ticket History can be found on the Ticket Detail Page by clicking More -> Ticket History. However, errors will only be reported in the Ticket History if they are specific to the ticket. For example, if the ticket sync has failed due to an authentication issue, these errors can be found in the “CRM Sync Errors” report as described above.
Automating Jira using API

Edition: Enterprise

TeamSupport offers an API which allows customers to have access to their TeamSupport data from outside of TeamSupport. You may use the API to set an existing Jira ticket link, or to create a new one.

The `<JiraKey>` element will be used to set or update the Ticket-Jira link. It is not case sensitive.

The value for it can be either the existing Jira issue key to link to the ticket to or to create a new Jira issue from the ticket using the value “NewJiraIssue” (not case sensitive, without quotes).

Existing ticket example

PUT: [API URL]\Tickets\1234
Body: `<Ticket><JiraKey>TEST-12</JiraKey></Ticket>`

This would set the link for ticket 1234 to a Jira issue with key TEST-12

New ticket example

PUT: [API URL]\Tickets\5678
Body: `<Ticket><JiraKey>newjiraissue</JiraKey></Ticket>`

This would set the link for ticket 5678 to create a new Jira issue.

These commands would also work with the (POST) verb.

These commands will work with both xml or json formats. It can be combined with the other Ticket elements like any other normal element.

Click here to learn more about our API and see other example API commands.
MailChimp

TeamSupport contacts can be synced up with a specific MailChimp list so that when you need to email your customers about product news, upgrades, maintenance, and so forth, you will know your list is always up to date.

1. Create a list within Mailchimp.

2. Locate your Mailchimp API key by clicking on the Account section and selecting API Keys below.
3. Copy your API Key.

![API Keys](image)

Copy and paste this into TeamSupport

4. Paste into your TeamSupport account under the Admin section/Integration tab.

![MailChimp](image)

All active contacts within active companies will be synced with the Mailchimp list you define above and will auto sync every 15 minutes, 24/7.

*Please note: *

1. You must have your Mailchimp list created first.

2. The Company record in TeamSupport must be active as well as the contacts within the company. If the company is inactive yet you have active contacts, those contacts will not sync over.

3. If you mark a contact as inactive in TeamSupport that has been synced to a Mailchimp list, they will be removed from the mailing list. To mark a contact active or inactive – edit the contact under the Customers section within your TeamSupport account.

Fields we are mapping to Mailchimp:
Contacts:
Email
FirstName
LastName
MS Dynamics

Edition: Enterprise

High-Level Overview

Microsoft Dynamics is a CRM (Customer Relationship Management) tool that focuses on sales and marketing. TeamSupport is not a sales tool and as such our solution does not entail sales force automation, lead generation, sales opportunities or marketing campaigns. We are focused on helping your organization provide the best customer & product support possible. The integration between TeamSupport and Microsoft Dynamics makes it very simple to provide an exceptional customer experience.

How it Works

Here is a simple diagram of how the MS Dynamics CRM integration works:

![Diagram of how the MS Dynamics CRM integration works]

Additional details regarding the integration:

- **Linking Customer Information:**
  - Once you have made a sale, simply change the Customer’s Account/Relationship Type in MS Dynamics to indicate that they are now an active customer.
  - Customers and their Contacts will be added to TeamSupport. Contacts must be associated with a Company in order to be added to TeamSupport.
  - When a Company/Contact is added to TeamSupport from MS Dynamics, we create an
“integration link” between the systems for that Account. The integration will only apply to Accounts that have been linked in this way.

- **Initial data “pull”:**
  - Mapped fields for new Customers, along with the Contacts associated with those Accounts, will be pulled into TeamSupport automatically on the initial pull.
  - Account Names: Initially, a search will be done to attempt to match the Account Name from MS Dynamics to a record in the TeamSupport database based an existing integration link. If none is found, a search will be done based on a matching account name. If neither an integration link or Account Name match can be found, a new record will be created.

- **Syncing Cases and Tickets (optional):**
  - When “Push-out Tickets as Cases” is active, the mapped fields will be sent to MS Dynamics as a Case associated with the corresponding Account on the next sync.
  - “Pull-in Cases as Tickets” works the same way, just in the opposite direction: MS Dynamics Cases and Case Comments are pulled into TeamSupport as Tickets and Actions.
  - If both boxes are checked, the system will keep all mapped fields in sync. For example, if the Ticket Status is updated on the Ticket, it will update the Status on the Case the next time the sync runs (typically between 15-60 minutes). In the event of a conflict, the newest update will win. For example, if the status is updated on a Ticket at 10:00 and the linked Case was updated at 10:05, the next time the sync runs, the new status will be pulled into TeamSupport and the status will be updated.

- **Future Updates to Customers and Contacts:**
  - Any changes that are made to these linked Accounts within MS Dynamics will be pulled into TeamSupport on subsequent syncs.
  - After the initial data pull into TeamSupport, the system will keep all Customer/Contact fields in sync. For example, if the Customer Name is updated in TeamSupport, it will update the Customer Name in MS Dynamics, and vise versa, the next time the sync runs (typically between 15-60 minutes). In the event of a conflict, the newest update will win. For example, if the Contact email is updated in MS Dynamics at 10:00 and the linked contact in TeamSupport is also updated at 10:05, the next time the sync runs, the new email will be updated in MS Dynamics.

## Setup

### Field Definitions

Log into TeamSupport with an account that has Administrator rights and go to Admin->Integration->MS Dynamics.
- **MS Dynamics URL**: This is the MS Dynamics app url of the organization, with the api subdomain. E.g. https://yourorganization.api.crm.dynamics.com/

- **MS Dynamics Authentication**: This page explains how to setup authentication within MS Dynamics for User Name, Password, Tenant ID, Client ID, and Client Secret.

- **Account Type to Link to TeamSupport**: This is a required field. This list of Account Types determines which of your MS Dynamics customers are brought into TeamSupport. It maps to the MS Dynamics field ‘Relationship Type’. When a new Account is updated that matches one of these Account Types, it will be brought in on the next sync. The following are valid entries for this field:
  - **One or more Account Types**: Note that you can use whatever type you want and can have as many as you want. Just separate them with a comma.
  - **NONE**: You can also put in the word “NONE” (no quotes) and we will import the Accounts/Contacts that have no Account type defined in your CRM.
  - **ALL**: If you need to bring over all types of Accounts, you can put in the word “ALL” (no quotes).

- **Pull-In Cases as Tickets**: This setting will pull in Cases and Case Notes from MS Dynamics as Tickets and Actions in TeamSupport. See the “How it Works” section above for more information.

- **Push-Out Tickets as Cases**: This setting will push out Tickets and Actions from TeamSupport as Cases and Case Comments in MS Dynamics. See the “How it Works” section above for more information.

- **Synchronization Active**: When you are ready, enable this option. Syncs typically run every 15-60 minutes.
• **Custom Field Mapping:** This is an optional feature that allows you to map fields other than the default fields between Accounts.

**Field Mapping**

As a best practice, it is advised that you align your ticket types, statuses and severities naming in TeamSupport with the case type, status, and priority in MS Dynamics. This way, if you change the status of a case, the status will be the same in TeamSupport and vice versa.

If an MS Dynamics case type, status, or priority does not exist in the corresponding field values in TeamSupport, the first existing one for the Organization based on the 'position' will be used. The 'position' is determined by the 'Position Field' value within the MS Dynamics Admin section.

If a TeamSupport Ticket Status, Type or Severity does not exist in the corresponding field values in MS Dynamics the value will be assigned as if it exists in the list of values, however, it will not be added to the picklist values.

To ensure proper mapping, when adding the MS Dynamics field values in the mapping settings, you need to provide the field’s ‘Display Name’ for default fields, and the actual backend field name for custom fields. This information is available in the MS Dynamics account.

**Default Field Mappings**

**Company**

**TeamSupport : MS Dynamics**

- “name”: “name”
- “Address Line1”: “Address 1: Street 1”
- “Address Line2”: “Address 1: Street 2”
- “City”: “Address 1: City”
- “Zip/Code”: “Address 1: ZIP/Postal Code”
- “State”: “Address 1: State/Province”
- “Country”: “Address 1: Country/Region”
- “Fax”: “Fax”
- “Phone”: “Phone”

**Contact**

**TeamSupport : MS Dynamics**
• “email”: “Email”
• “First Name”: “First Name”
• “Last Name”: “Last Name”
• “Title”: “Job Title”
• “Phone”: “Business Phone”
• “Mobile”: “Mobile Phone”
• “Fax”: “Fax”

Ticket
TeamSupport: MS Dynamics

• “Name”: “Title”
• “Description (action#1)”: “Description”
• “Ticket Type”: “Type”
• “Ticket Status”: “Status”
• “Severity”: “Priority”

Custom Field Mappings (Optional)

If you have Custom Fields on Accounts, Contacts, and Cases in your MS Dynamics account, you can create those same Custom Fields for Customers, Contacts, and Tickets in your TeamSupport account.

Custom Field Mapping (Optional)

<table>
<thead>
<tr>
<th>Mapping Type</th>
<th>MSDynamics Field</th>
<th>TeamSupport Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td></td>
<td>UserID</td>
</tr>
</tbody>
</table>

Add Mapping

Account Mappings

ActiveYN -&gt; IsActive ✗
CreatedUser -&gt; CreatedBy ✗

Contact Mappings

UserID -&gt; UserID ✗

Ticket Mappings

ClosedDate -&gt; DateClosed ✗

To add a Custom Mapping, first choose a Mapping Type: Account, Contact, or Ticket. Based on your selection, the available TeamSupport fields will be displayed in a drop down menu. Please note that
Standard and Custom Fields are displayed in this list. Next, type in the MS Dynamics API field name.

Finally, click the “Add mapping” button. Your map will be displayed in the appropriate category.

A common field to map for Accounts and Contacts is called “IsActive”, which can be found under custom mappings. By mapping this field to your MS Dynamics field, you can automatically mark Accounts and Contacts as no longer being active.

**Synchronization Run Times**

The first synchronization will start after 15 minutes. The next cycle will begin no sooner than 15 minutes. The timing of each subsequent cycle depends on it’s place in the queue, which is affected by the number of other items that require processing. Typically the timing of the cycles range from 15 – 60 minutes.
MS Dynamics Integration Authentication

This page explains how to acquire the following fields required for the MS Dynamics Integration.

**MSDynamics**

TeamSupport has native integration with MSD

Our integration will **PULL** in MS Dynamics "Accounts" & MS Dynamics or TeamSupport

We also offer a **bi-directional** sync between MSDynami

**MSDynamics URL**

**MSDynamics User Name**

**MSDynamics Password**

**Confirm Password**

**Tenant ID**

**Client ID**

**Client Secret**

**Account Type to Link to TeamSupport**

- **MS Dynamics User Name**: The username for the MS Dynamics account of the registered application user.
- **MS Dynamics Password/Confirm Password**: The password for the MS Dynamics user account of the registered application user.
- **Tenant (Directory) ID**: This is the MS Dynamics Microsoft Tenant ID to authenticate to.
- **Client ID**: The Client ID is assigned by Microsoft when the app is registered.
- **Client Secret**: The Client Secret is assigned by Microsoft when the app is registered.
Client ID and Tenant ID

- The MS Dynamics account must be registered as an app in Azure, because Azure is the authentication authority for Microsoft apps:

- Once in Azure, search for ‘App registrations’.

- Click ‘+New Registration’ and fill out the information.
Register an application

**Name**
The user-facing display name for this application (this can be changed later).

Supported account types
Who can use this application or access this API?
- [ ] Accounts in this organizational directory only (TeamSupport only - Single tenant)
- [ ] Accounts in any organizational directory (Any Azure AD directory - Multi tenant)
- [ ] Accounts in any organizational directory (Any Azure AD directory - Multi tenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Help me choose...

Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

By proceeding, you agree to the Microsoft Platform Policies

• Click the ‘Register’ button.

• The Client ID and Tenant ID will be generated for the application. Please write these down as they will be needed later during setup.

- Display name: TeamSupport
- Application (client) ID: c92eb8d0-b979-4843-a31d-cd4
- Directory (tenant) ID: f5f97bdf-8f10-4893-a7fe-1b73e
- Object ID: 09a9755f-5bdf-4f39-968c-ebde

Client Secret

• Go to the Certificates & Secrets page.
Add a new client secret. Enter any description and choose an expiration. “Never” is an option for expiration. If an expiration date is selected, this secret will expire and will need to be regenerated.

Add a client secret

Description

Expires
- In 1 year
- In 2 years
- Never

Add  Cancel

Click ‘Add’ and the secret will be displayed.

Make note of it as it won’t ever be displayed again

Copy the new client secret value. You won’t be able to retrieve it after you perform another operation or leave this blade.
User Name and Password

• Search for the Users page.

• Click ‘+New User’ on the Users page.

• Click ‘Create’.

• Enter the information for a new User that will be used by the TeamSupport integration.
New user

Create user

Create a new user in your organization. This user will have a user name like alice@integrationdev.onmicrosoft.com. I want to create users in bulk

Invite user

Invite a new guest user to collaborate with your organization. The user will be emailed an invitation they can accept in order to begin collaborating. I want to invite guest users in bulk

Identity

User name *  ○

Example: chris integration.onmicrosoft.com

The domain name I need isn't shown here

Name *  ○

Example: 'Chris Green'

First name

Last name

Groups and roles

Groups  ○  0 groups selected

Roles  ○  User

• Go to API permissions.
• Add a permission.

[Add a permission]

• Select ‘Dynamics CRM’.

[Dynamics CRM]

Access the capabilities of CRM business software and ERP systems

• Check the ‘user_impersonation’ permission.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Admin Consent Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>user_impersonation</td>
<td></td>
</tr>
<tr>
<td>Access Common Data Service as organization users</td>
<td>-</td>
</tr>
</tbody>
</table>
This completes the setup needed in Azure.

**Authorization**

- Inside of MS Dynamics, go to Settings->Security.

- Select Application Users.
• Click ‘+NEW’.

• Select ‘Application user’ in the dropdown list next to User:
Enter the username and Application ID (Client ID) obtained in Azure in the earlier steps to this setup.
• Click ‘Save’. The next two fields should auto-populate.

### Summary

<table>
<thead>
<tr>
<th>Account Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User Name</strong></td>
</tr>
<tr>
<td><strong>Application ID</strong></td>
</tr>
<tr>
<td><strong>Application ID URI</strong></td>
</tr>
<tr>
<td><strong>Azure AD Object ID</strong></td>
</tr>
</tbody>
</table>

• Click ‘Manage Roles’.

#### MANAGE ROLES

• From the list select the role to be assigned to this user. It must be a role that will allow access to modify accounts, contacts, cases, and comments. Click ‘OK’.
Manage User Roles

What roles would you like to apply to the 1 User you have selected?

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Business Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Manager</td>
<td>integrationdev</td>
</tr>
<tr>
<td>Activity Feeds</td>
<td>integrationdev</td>
</tr>
<tr>
<td>CEO-Business Manager</td>
<td>Integrationdev</td>
</tr>
<tr>
<td>Channel Access</td>
<td>integrationdev</td>
</tr>
<tr>
<td>Common Data Service User</td>
<td>integrationdev</td>
</tr>
<tr>
<td>CSR Manager</td>
<td>integrationdev</td>
</tr>
<tr>
<td>Customer service app access</td>
<td>integrationdev</td>
</tr>
</tbody>
</table>

⚠️ As you assign security roles to your users, you will enable access and the ability to extract your data. Access is enabled through multiple clients (i.e. Dynamics 365 for Outlook, Dynamics 365 for tablets, web-user). You may administer these access privileges by...
Phone Systems

TeamSupport can be integrated with many phone systems so that the customer record is called up automatically based on caller ID (a “call pop”).

If your phone system has the ability to call a URL when a call comes in, simply point it to: https://app.[ServerName].TeamSupport.com?phonenumber=xxxyyyzzzz

Replace the “xxxyyyzzzz” with the inbound phone number, and that persons contact record will be displayed when the phone rings.

There are a few things to consider when using this feature.

1. Does your phone system support URL calls? If so, simply configure your phone system settings to make the URL call listed above. You may need to reference your phone system provider to ensure it has this ability.
2. If your phone system does not support URL calls, it must support TAPI so that you may build a small application that will identify incoming calls and in turn make URL calls to TeamSupport.
3. If you do not have an IP based phone system, you can still use this feature as long as there is a modem within your PC and an application (typically provided by your vendor) to identify incoming calls which can in turn perform the necessary URL call listed above.
RingCentral

TeamSupport offers two ways to integrate with the RingCentral phone system.

Call Pops
If you are using the RingCentral softphone application, you can have it launch TeamSupport automatically and bring up information on the client who is calling you.

With the softphone application running, go to the upper left and click the menu button, then select “Options”. In the options menu, select “Calls” on the left, then check the box for “Launch another application or URL” and then click the Customize button.

When the customize menu comes up, put the following text into the “Execute Command” box:

https://app.[ServerName].teamsupport.com?phonenumber=%E

It should look like this:
When this setup is complete, whenever your extension rings, TeamSupport will automatically open and we will try to locate a Customer record which matches the phone number from the caller ID.

**VoiceMail Integration**

If someone calls your support line and leaves a voicemail, you can set up RingCentral to forward that message to an email address. Simply set the forwarding address to the email which forwards into TeamSupport and a new ticket will be created which will have the audio of the voicemail as an attachment.

You can get creative with these by setting up a Ticket Automation to notify people or route a voicemail differently than other tickets, or you could use an alternate email address to treat these tickets in a different manner than a normal email ticket that comes into the system.
Salesforce

Edition: Enterprise

High Level Overview

TeamSupport is not a sales tool and as such our solution does not entail sales force automation, lead generation, sales opportunities or marketing campaigns. We are focused on helping your organization provide the best customer & product support possible. The integration between the two products makes it very simple to provide an exceptional customer experience.

TeamSupport is Salesforce App Exchange certified which means that you can share data between TeamSupport and Salesforce. Here is our listing on the Appexchange.

How it Works

Here is a simple diagram of how the Salesforce integration works:
Additional details regarding the integration:

- **Linking Customer Information:**
  - Once you have made a sale, simply change the Customer’s Account Type in Salesforce to indicate that they are now an active customer.
  - Customers and their Contacts will be added to TeamSupport. Contacts must be associated with a Company in order to be added to TeamSupport.
  - When a Company/Contact is added to TeamSupport from Salesforce, we create an “integration link” between the systems for that Account. The integration will only apply to Accounts that have been linked in this way. This means a Company/Contact account that was created manually in TeamSupport will not be updated via the Salesforce integration.

- **Initial data “pull”:**
  - Mapped fields for new Customers, along with the Contacts associated with those Accounts, will be pulled into TeamSupport automatically on the initial pull.

- **Syncing Cases and Tickets (optional):**
  - When “Push-out Tickets as Cases” is active, the mapped fields will be sent to Salesforce as a Case associated with the corresponding Account on the next sync.
  - “Pull-in Cases as Tickets” works the same way, just in the opposite direction: Salesforce Cases and Case Comments are pulled into TeamSupport as Tickets and Actions.
  - If both boxes are checked, the system will keep all mapped fields in sync. For example, if the Ticket Status is updated on the Ticket, it will update the Status on the Case the next time the sync runs (typically between 15-60 minutes). In the event of a conflict, the newest update will win. For example if the status is updated on a Ticket at 10:00 and the linked Case was updated at 10:05, the next time the sync runs, the new status will be pulled into TeamSupport and the status will be updated.
• **Future Updates to Customers and Contacts:**
  ◦ Any changes that are made to these linked Accounts within Salesforce will be pulled into TeamSupport on subsequent syncs.
  ◦ Any changes that may have been made inside of TeamSupport for these Accounts will be overwritten by the Salesforce data. TeamSupport never pushes any Customer/Contact data to Salesforce, as Salesforce data is treated as the master record.

### Setup

### Field Definitions

Log into TeamSupport with an account that has Administrator rights and go to Admin->Integration->Salesforce.

- **Salesforce User Name:** This is a required field. This is the email you use to log into your Salesforce account.
- **Salesforce Password/Confirm Password:** This is a required field. This is the password you use to
log into your Salesforce account.

- **Salesforce Security Token/Confirm Security Token:** This is a required field. The Salesforce Security Token can be found in your Salesforce account.

- **Account Type to Link to TeamSupport:** This is a required field. This list of Account Types determines which of your Salesforce customers are brought into TeamSupport. When a new Account is updated that matches one of these Account Types, it will be brought in on the next sync. The following are valid entries for this field:
  - **One or more Account Types:** Note that you can use whatever type you want and can have as many as you want. Just separate them with a comma.
  - **NONE:** You can also put in the word “NONE” (no quotes) and we will import the Accounts/Contacts that have no Account type defined in your CRM.
  - **ALL:** If you need to bring over all types of Accounts, you can put in the word “ALL” (no quotes).

- **Default SLA:** By selecting a predefined SLA from the drop down menu, the SLA will be applied to the Customers settings. The default selection made will be the first SLA in your available list. This can be changed later if necessary.

- **Synchronization Active:** When you are ready, enable this option. Syncs typically run every 15-60 minutes.

- **Pull-In Cases as Tickets:** This setting will pull in Cases and Case Notes from Salesforce as Tickets and Actions in TeamSupport. See the “How it Works” section above for more information.

- **Only pull in Comments from linked Cases:** This setting will allow the TeamSupport ticket to be the main point of record for the fields, but comments will flow back and forth between the systems. It will also still allow tickets created in Salesforce to flow back into TeamSupport.

- **Push-Out Tickets as Cases:** This setting will push out Tickets and Actions from TeamSupport as Cases and Case Comments in Salesforce. See the “How it Works” section above for more information.

- **Push-Out Tickets as Account Notes:** This setting will push out Tickets from TeamSupport as Account Notes in Salesforce. If this option is checked, when a new ticket is created in TeamSupport, an Account Note will be created for the Account which gives the title of the ticket and a hyperlink to open the ticket in TeamSupport. After the initial Account Note is created, there are no other updates or additions made to the Account Notes even if there are changes made within TeamSupport.

- **Give Portal access to customers imported:** Setting this option will automatically allow every imported Contact to access your Customer Hub.

- **Send welcome email to imported Contacts:** When a new Contact is added and given Customer Hub access, TeamSupport can automatically send each customer a welcome email that contains a link to your Hub, their user name and a temporary password. The Welcome email can be customized by editing the email templates here.

- **Match Accounts by name:** This option is intended to prevent creation of duplicate Company records. If enabled, if we find an Account update to pull from Salesforce, we first check to see if we have pulled it over before (by using a unique stored ID). If the ID is not found, we search the TeamSupport database for a match name for a Company created manually, for example. If found, we will apply the changes to the matched Company and will use this record going forward. If a matched name is not
found, then it is created and a unique ID is stored. If disabled, we do not check for the matched name, thus creating the potential for duplicate Company names if you have already manually entered the Company.

- **Use sandbox server**: If you are on a trial version of Salesforce, you may be using a "Sandbox" server. If so, this option needs to be enabled.
- **Custom Field Mapping and Product Associations**: This is an optional feature which allows you to map fields other than the default fields between Accounts.

**Field Mapping**

* As a best practice, it is advised that you align your ticket types, statuses and severities naming in TeamSupport with the case types, statuses and priorities in Salesforce. This way, if you change the status of a case, the status will be the same in TeamSupport and vice versa.

If a Salesforce Case Status, Type or Priority does not exists in the corresponding field values in TeamSupport the value will **NOT** be updated. If it is a new case, the first Status, Type or Severity will be assigned by default.

If a TeamSupport Ticket Status, Type or Severity does not exist in the corresponding field values in Salesforce the value will be assigned as if it exists in the list of values, however it will not be added to the picklist values.

**Default Field Mappings**

**Companies**: If these fields are changed in TeamSupport, the sync will override these values.

- Name
- Shipping or Billing Street
- Shipping or Billing City
- Shipping or Billing State/Province
- Shipping or Billing Zip/Postal Code
- Shipping or Billing Country
- Phone
- Fax

**Contacts**: If these fields are changed in TeamSupport, the sync will override these values.

- Email
- FirstName
- LastName
- Title
• Phone
• Mobile
• Fax

**Tickets:**

• Name
• Description
• Type
• Status
• Severity
• Assigned To (Tickets to Cases only)
• Creator (Tickets to Cases only)
• Modifier

**Actions:**

• Action Description
• Action Creator

---

**Custom Field Mappings and Product Association**

To ensure proper mapping, when adding the Salesforce field values in the mapping settings, you need to provide either the “Field Name” (for regular fields) or “API Name” (for custom fields). This information is available in Salesforce under Setup -> App Setup -> Customize -> either Accounts or Contacts depending on which type of object you are working with. The correct field name will not contain any spaces or special characters other than underscores. Here is an example: `Customer_Success_Manager__c`. If the field type of your Salesforce field is “lookup”, you will need to change the letter “c” at the end of your API name to the letter “r”. This will pull over the “relationship name” value as opposed to the ID number value in the lookup field. Here is an example: `Customer_Success_Manager__r__r`.

---

**Custom Field Mappings (Optional)**

If you have Custom Fields on Accounts, Contacts, and Cases in your Salesforce account, you can create those same Custom Fields for Customers, Contacts, and Tickets in your TeamSupport account.
To add a Custom Mapping, first choose a Mapping Type: Account, Contact, or Ticket. Based on your selection, the available TeamSupport fields will be displayed in a drop down menu. Please note that Standard and Custom Fields are displayed in this list. Next, type in the Salesforce API field name (see below for more info on API field names).

Finally, click the “Add mapping” button. Your map will be displayed in the appropriate category.

A common field to map for Accounts and Contacts is called “IsActive”, which can be found under custom mappings. By mapping this field to your Salesforce field, you can automatically mark Accounts and Contacts as no longer being active.

**Product Associations (Optional)**

The Product Association section allows you to “map” a Salesforce Custom Field to a [Product or Product Version]:

This will cause the Customer to be associated to the Product or Product Version within TeamSupport:
To create a Product Association, follow this format along with the examples images above.

- **Product**: First type in the API Name of the Salesforce Custom Field which will contain the Product Name. Type `Product` into “TeamSupport Field” just as it is in the settings image above. If you type anything other than `Product` as the value in “TeamSupport Field”, the Customer Product association will not work correctly.

- **Version**: First type in the API Name of the Salesforce Custom Field which will contain the Version Name. Type in `[Product]_ProductVersion` into “TeamSupport Field”, where `{Product}` is replaced with the Product name that the Version is associated with. The example in the screenshot above illustrates that when the Salesforce field named “DBWizard_Version__c” contains the version number, that would be "mapped" to the TeamSupport Field "DBWizard_ProductVersion". If the value of this field from Salesforce is 1234, then the Customer will be associated with Version 1234 of the DBWizard Product.

Finally, click the “Add Mapping” button, and your Product Association will be listed.

A few notes about Product Associations:

- Each Version belongs to a Product within TeamSupport. When associating Versions to Customers, the Customer must already be associated with the Product to which the Version belongs. If the Customer is not already associated to the Product, the Version will not be associated.
- Products and Product Versions are never added into TeamSupport.
- The association takes place when a new Customer is being added, and also when an existing Customer is being updated.
Synchronization Run Times

The first synchronization will start after 15 minutes. The next cycle will begin no sooner than 15 minutes. The timing of each subsequent cycle depends on it’s place in the queue, which is affected by the number of other items that require processing. Typically the timing of the cycles range from 15 – 60 minutes.

Logging and Troubleshooting

If your tickets are not syncing, you may look for errors in the “CRM Sync Errors” report which can be found in the Reporting Section. Additionally, logging reports can be found in the CRM Sync Logs report.

Case Sync with Salesforce Lightning

If you using Salesforce Lightning, you may have issues syncing cases with the integration. This is because in Lightning, the default communication action is called a “Post.” Case comments are not a default “Quick Action” within the new Lightning version. In order to fix this, you may need to follow the steps in this link in order for comments to sync over.

TeamSupport Button in Salesforce

You may add a TeamSupport button inside of your Salesforce account. Click here to learn more.
Salesforce Integration Activation

The activation of the integration is straight forward. Salesforce’s API is tied to a specific user, so the first step is to determine what user login you will use to interface the two products. Some users spend the extra money with Salesforce to get a dedicated API user id, while others simply use the Support Manager’s user id. In either case, log into Salesforce with that account information and get the Security Token.

The Salesforce security token will be e-mailed to you by following these steps:

1. Log in to Salesforce via the browser to request your security token.
2. Click your name at the top of the screen
3. Click “My Settings”
4. Click “Personal” on the left hand list to expand
5. Click the “Reset My Security Token” link to trigger an email which will contain your security token.
6. Select and copy the token from the email.

This Security Token will need to be entered into your Salesforce Integration page which is found by going to Admin->Integration Tab->Salesforce. There are several required fields required for the integration. These are defined [here](#). Please remember to check the “Synchronization Active” box when you ready to start the sync.

Troubleshooting:

If you have followed the steps above, but do not see the Customer information in a few minutes, please go to Reports and select the “CRM Sync Logs” report in TeamSupport. This report should show you the synchronization activity and errors that have occurred.

You can also go to Salesforce and select Setup->My Personal Information->Personal Information. At the bottom of that page is a list of user logins and API attempted logins to your Salesforce account.
TeamSupport Button in Salesforce

Add A TeamSupport Button To Salesforce

In addition to the sync settings that can be found here, TeamSupport also offers an additional way to integrate with Salesforce by adding a button which opens up the Salesforce Account’s information in TeamSupport.

All you have to do is create a button that points towards https://app.[ServerName].TeamSupport.com?CustomerName=xxx where “xxx” is the name of the company.

Let’s take a look at how this is done in Salesforce:

1. Log in as an administrator account and select “Setup” at the top of the screen.
2. On the left side of the screen, select App Setup -> Customize -> Accounts -> Buttons and Links
3. About midway down the page select the “New” button on the “Custom Buttons and Links” page.
4. Create a button that looks like the picture below. Note that we are using a Salesforce custom field of {!Account.Name} as a variable that will be passed to TeamSupport. It is important to understand that we are matching the company name between the two systems, so the name has to be identical in Salesforce and TeamSupport.

You can copy/paste this string into your Salesforce account as seen below:
5. Go to the Page Layout (App Setup -> Customize -> Accounts -> Page Layout) and decide where you want to add the button to the page. We have found that adding it to the Detail Page Buttons section is the most useful.

6. When completed, your Salesforce implementation will look similar to below:

![Salesforce Page Layout Example](image)

7. And when you press the button, you will be redirected to the customer’s page, like the example below:
Acme

Open Tickets: 6

Closed Tickets: 3

CDI

Recent Ticket History
Open Tickets: 9
1189: Sample Onboarding
Ticket #2
1016: Test
940: hello
979: test ticket
723: inventory needs to be replaced

Company Info
Phone
Address

General Info (Custom Category)
Contract #: 0675309
Status: Unassigned
Account Pin Preference: 9763845
Name: Acme
Primary Contact: Acme Group
**ServiceNow (SNOW)**

**Edition: Enterprise Only**

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### High Level Overview

In TeamSupport we are focused on helping your organization provide the best Customer & Product support possible. If you are using ServiceNow to help manage your internal IT infrastructure, the integration between the two products makes it very simple for your teams to collaborate and improve overall efficiency.

### How it works

Here is a simple diagram on how the ServiceNow integration works:

---

Additional details regarding the integration:
• Linking Tickets to Incidents:
  ◦ A single Incident in ServiceNow can be linked with multiple Tickets in TeamSupport.
  ◦ An Incident in ServiceNow cannot create a Ticket in TeamSupport.
  ◦ You may link a TeamSupport Ticket to a new or existing ServiceNow Incident.
  ◦ When successfully linked, a Ticket URL link will be placed in ServiceNow Incident, and the Incident Number will become a link on the TeamSupport Ticket Page.

• Initial “push” of Custom Mapped Fields: When a New Incident is created, Custom Mapped Fields are pushed from TeamSupport to ServiceNow. This step does not happen when a Ticket is linked to an existing ServiceNow Incident. Future updates made within TeamSupport to Custom Mapped Fields are NOT sent to ServiceNow.

• Incident updates “pushed” to Ticket: Any changes made to the State or any of the Custom Mapped Fields in a ServiceNow Incident will also be changed in the linked TeamSupport Ticket. This means any values in TeamSupport values will be overwritten by the updated values in ServiceNow.

• Actions and Comments/Work Items are kept in-sync:
  ◦ Comments created in the ServiceNow Incident will also be created in the linked TeamSupport Ticket as Public Actions. Work Notes created in Service Now will also be created in the linked TeamSupport Ticket as Private Actions. Updates to existing Comments and Work Notes will NOT be updated in TeamSupport Actions.
  ◦ Public Actions created in the TeamSupport Ticket will also be created in the linked ServiceNow Incident as Comments. Private Actions created in the TeamSupport Ticket will also be created in the linked ServiceNow Incident as Work Notes. Updates to existing Actions will NOT be updated in ServiceNow. You can push all TeamSupport Ticket Types and Action Types to ServiceNow, or only one as defined in the integration.

Setup

For this integration, we utilize a WebHook, which is a simple event-notification via HTTP POST. ServiceNow will POST a message to a URL when an incident that is linked to a ticket is updated. This allows for real-time updates to your TeamSupport account.

Log into TeamSupport with an account that has Administrator rights and go to Admin->Integration->ServiceNow. You should see a screen like this:
Field Definitions

- **TeamSupport WebHook**: Click the “Generate” button to generate your WebHook URL. You will need to provide this URL to your ServiceNow account. View [this help article](#) and [this one](#) on what to do with this WebHook. This URL is read-only and must be copied exactly as it is displayed inside of your account, otherwise, the integration will not work correctly.

- **Get Business Rule Links**: The ServiceNow integration operates based on instructions designed to work with a given partner. You must copy our defined Business rules, then paste them into your ServiceNow Business rule setup. These scripts must be copied exactly as they are displayed inside of your account, otherwise, the integration will not work correctly. Additionally, when you create the Business Rules in ServiceNow, there is a name field that you must enter. The name entered is
referenced within each business rule, so it must be typed in exactly as follows otherwise the integration will not work correctly: TeamSupportIntegration. View this help article about the business rules, and where to paste it in your ServiceNow account.

- **Host Name**: Required. Enter your full ServiceNow Host Name.
- **User Name**: Required. Enter the ServiceNow username/email that will be used to create Incidents.
- **Password/Confirm Password**: Required. Enter the password for the ServiceNow account in the Password and Confirm Password fields.
- **RITM Type To Sync Comments When Request**: This setting allows you to define which Requested Item (RITM) you would like to be created from TeamSupport to SNOW.
- **Actions Type to push to ServiceNow as Comments**: Select the “All Types” option if all actions need to be sent to ServiceNow, otherwise, select an Action Type from the list.
- **Update TeamSupport Tickets Statuses**: If you need to update the TeamSupport Ticket Status whenever the ServiceNow State is updated, check this option. It is important to verify that the different ServiceNow States are also listed in as a TeamSupport Ticket Status, or are mapped accordingly in the Custom Mapping below.
- **Exclude the following**: A multi-selection box will appear if the “Update TeamSupport Ticket Statuses” box is checked. You may select all Statuses which do not map to ServiceNow.
- **Use All Ticket Types**: If you would like to allow all Ticket Types to be synced with ServiceNow, leave “All Ticket Types” checked. If you would like to limit the Ticket Types, uncheck this box and select only the Ticket Types that you would like to be allowed to sync with ServiceNow. The ServiceNow box will only show up on tickets that have the selected Ticket Types.
- **Synchronization Active**: Sets the synchronization to active.
- **Save**: Click the save button to save your changes.
- **Custom Field Mappings (Optional)**: After you mark your synchronization as “Active”, your Custom Field Mappings will appear to the right of your other settings. These will allow you to map additional Ticket fields other than the defaults listed above including Custom Fields. There is additional information about Custom Field Mappings below.

### Default Field Mapping

Below is the list of fields that are mapped between TeamSupport and ServiceNow.

<table>
<thead>
<tr>
<th>TeamSupport</th>
<th>ServiceNow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket</td>
<td>Incident</td>
</tr>
<tr>
<td>Ticket Number</td>
<td>Incident Number</td>
</tr>
<tr>
<td>Public Action</td>
<td>Comment</td>
</tr>
<tr>
<td>Private Action</td>
<td>Work Note</td>
</tr>
<tr>
<td>Status</td>
<td>State</td>
</tr>
<tr>
<td>Attachments</td>
<td>Attachments</td>
</tr>
</tbody>
</table>
Additional Field Mappings (Optional)

After you mark your Synchronization as “Active”, your Custom Field Mappings will appear to the right of your other settings. These will allow you to map additional Ticket fields other than the defaults listed above including Custom Fields.

Field Definitions

- **ServiceNow Field**: Enter the name for your ServiceNow Field.
- **TeamSupport Ticket Field**: Select the corresponding TeamSupport Ticket Field from the list. This list includes Custom Ticket Fields.
- **Add Mapping Button**: Click this button to add the mapping and the mappings will display below. The mapping can be deleted at any time by clicking the “x” to the right of the mapping as displayed in the image above.
- **Is Variable?**: Check this box if the ServiceNow field that is being mapped is a variable field.

Linking Tickets and Incidents from the Ticket Window

Once the integration page is set up as described above, a ServiceNow link section will become available on the right-hand side of an existing Ticket. This option is not available on a new Ticket.

Creating a New Incident Number

Clicking the “New Incident Number” button will add the ticket to the queue to sync and the Incident Number will display “Pending…”. When this process is complete, the box will change from “Pending…” to the Incident Number with a link. Default and Custom Mapped field values will be used on the Incident.
Linking an Existing ServiceNow Incident

Clicking in the “Existing Incident” button will allow you to enter the Incident Number to sync with:

Enter the number and click on the Save button. The Incident will be displayed in black font without a link to ServiceNow. Once the sync has taken place a new remote link will be added to the synced ServiceNow Incident. Additionally, the TeamSupport ticket will contain a link to the ServiceNow Incident.

Removing a Ticket sync to ServiceNow

You may click the “x” at any time next to the sync in order to remove the link to ServiceNow.

Updating Data

All updates should occur within 15 seconds. You may need to refresh your window in order to see updates on demand.

If you do not see the expected updates, see the Logging and Troubleshooting section.

Logging and Troubleshooting

If your tickets are not syncing, you may look for errors in the “CRM Sync Errors” report which can be found in the Reporting Section. Additionally, logging reports can be found in the CRM Sync Logs report.

Additionally, ServiceNow errors may be logged in the Ticket History. Ticket History can be found on the
Ticket Detail Page by clicking More -> Ticket History. However, errors will only be reported in the Ticket History if they are specific to the ticket. For example, if the ticket sync has failed due to an authentication issue, these errors can be found in the “CRM Sync Errors” report as described above.
Slack

Slack is a popular group communication tool, and TeamSupport has the ability to post messages on one of your Slack channels through Ticket Automation.

To enable the integration, first go to https://yourcompany.slack.com/apps/manage (where ‘yourcompany’ is your domain for Slack). You’ll see a page like the below, and select “Incoming WebHooks”:

On the Incoming Webhooks page, select “Add Configuration”: 
This is the page where you will configure what channel you want the TeamSupport integration to post to along with some other information.

First, select the channel that you want TeamSupport messages to post to, then click “Add Incoming Webhooks integration”. Note that currently we can only post to a single channel through Automation:

Once you have created the integration, you will see a page similar to the below with a “Webhook URL”. Cut and paste this URL – This is what will be entered into your TeamSupport instance.
Note that if you scroll down on this page, you will have a series of other options including the icon to use, a descriptive label, and some other settings.

Once you've copied the WebHook URL, go to the TeamSupport admin page, select integrations, and Slack:

Cut and paste the Webhook URL from above, and check the “Synchronization active” checkbox, then click Save.

In Ticket Automation you will now have a new action for “Post to Slack”. This will operate essentially the same as “Post to Watercooler” except that Slack doesn’t use HTML formatting. They have their own markup language which you can read about here.

Placeholders will work the same as with other Ticket Automations, except you should use the {{Ticket.SlackURL}} placeholder in place of the {{Ticket.URL}} one due to how Slack formats URLs.

You can also override the default Slack ‘channel’ you set when creating the Webhook – When you select the Post to Slack action in Ticket Automation, there will be a box to the right. Simply put the channel name in this box and the message will be directed to that channel:
Perform the following actions on the ticket:

Post to Slack

This will post to the testchannel on Slack, irrespective of what default channel you set up in the Webhook.
Survey Monkey

While TeamSupport offers a native Ratings solution, there are some cases where you may need a full suite of survey features for more granular feedback collection and analysis.

By adding a simple link to your Ticket Closed email template in TeamSupport, when a ticket is closed, your Customer will be able to click a link, and be taken to your Survey Monkey survey.

The link will include the Customers name, Company and Ticket Number and other important information.

Survey Setup

1. You’ll need a Survey Monkey account, which you can sign up for here.
2. Create your survey. In the settings, make sure you turn on Multiple Responses (see the below screenshot). Make note of your Web Link – you’ll need it later. The reason you’ll want to turn this feature ON, is because Survey Monkey will know if a unique visitor has taken the survey before. In some cases, this of course makes perfect sense. But in this case, you want your customers to take this survey each time a ticket is closed.

3. In TeamSupport, go to Admin -> Email, then scroll down to the bottom where the Templates are located, and select Ticket Closed.
4. In the body of the Closed Ticket, you will need to insert the Web Link that you noted from Step 2. The example below includes xxxxxxx. If you would like to use this link, replace the x’s with your unique Survey Monkey Weblink (found in your Survey Monkey Survey).
Please provide your feedback <a href="https://www.surveymonkey.com/r/xxxxxx\x?CustomerName={{Ticket.Customers}}&UserName={{ToEmailAddress}}&TicketNumber={{Ticket.TicketNumber}}">HERE</a>.

The placeholders in this example are the Customer Name (Their Company), the Contact name (Your client who gets this email and clicks the link), and the Ticket Number. This way, when you view the survey results in your Survey Monkey account, you’ll know who answered your survey questions.

The “Please provide your feedback” wording is just an example and you may change the wording as you see fit. As with any email template, you can customize as needed, and click “Preview”.

5. It is important that the placeholders you use in the TeamSupport email above need to also exist in your Survey. Survey Monkey offers a very simple instruction on how to create these here. They are called Custom Variables.

Specifically from their site:

**Creating Custom Variables in the Design Survey Section**

**BUILD AND STYLE:** We’re working on a refresh of the Design Survey page where it’s split into two separate sections called Build and Style. If you’re seeing this in your account, learn more here: Build and Style

To add custom variables:

1. Click the Design Survey tab.
2. In the left sidebar, click LOGIC.
3. Click Custom Variables.
4. Set up the first variable by completing the following fields:
   - **Variable Name (required)** - This will appear in the URL string itself. The Variable Name cannot contain any spaces. Max 50 characters.
   - **Label (optional)** - This will appear in your analysis, so create a label that will help you track what information the field contains. Max 250 characters.
5. Click Save.
6. If you wish to add additional custom variables, click + Add New Custom Variable and repeat steps 4 and 5.
Here are some screenshots from Survey Monkey using these exact settings:
Closed Ticket Survey

Summary ➔ Design Survey ➔ Collect F

- QUESTION BANK
- BUILDER
- THEMES

- LOGIC

Custom Variables

- Add New Custom Variable
  - CustomerName
  - UserName
  - TicketNumber

< Done

- OPTIONS
More Placeholders are available in your TeamSupport account. Make sure when creating your Survey Monkey Custom Variables, you use the same name as the TeamSupport placeholder for ease of management and proper functionality.
Survey Results

Within your Survey Monkey account Click “Analyze Results”
You may export your results. You’ll typically find one of the two highlighted below most useful.
You have several export options:

- **XLS**: Opens in Microsoft Excel.
- **XLS+**: Opens in advanced statistical and analytical software.
- **DRIVE**: Downloads directly to Google Sheets.
- **SPSS**: Open in your SPSS analytical software.
- **PDF**: Ideal for sharing and printing.

**Data View**: Select **Current View** or **Original View (No rules applied)**.

**Columns**: Choose **Condensed** or **Actual Answer Text**.

**File Name**: Enter the desired file name, e.g., `Data_All_170322.zip`.
This screenshot shows the report download in progress:

Once downloaded, you'll extract the zip, and choose the “sheet” file.
Team Foundation Server (TFS)

Edition: Enterprise

High Level Overview

In TeamSupport we are focused on helping your organization provide the best Customer & Product support possible. If you are using Microsoft Visual Studio Team Foundation Server to keep track of bugs and projects and your support team have identified a problem that needs to be reviewed by your development team, the integration between the two Products makes it very simple for your teams to collaborate and improve your customer’s experience.

Supported Versions

Currently, the integration supports TFS version 2015 installed, and the latest Visual Studio Team System (VSTS) Cloud based version.

On September 10, 2018, Microsoft renamed Visual Studio Team Services (VSTS) to Azure DevOps Services. For more information about this change, see this blog post. Here is additional information about the transition. The affect of this change within TeamSupport is that it may be necessary to use your Azure Organization URL Hostname in the TeamSupport integration in order for the linking to work.

How it Works

Here is a simple diagram of how the TFS integration works:
Additional details regarding the integration:

- **Linking Tickets to Work Items:**
  - A single Work Item in TFS can be linked with multiple Tickets in TeamSupport.
  - A Work Item in TFS cannot create a Ticket in TeamSupport.
  - You may link a TeamSupport Ticket to a new or existing TFS Work Item.
  - When creating a New TFS Work Item, the TeamSupport [Ticket Type](#) must match the TFS Work Item Type. Please be aware that in TFS, Work Item Types may also be dependent on the selected Project. Therefore, a successful Ticket Type/Work Item match may also be dependent on a Product/Project match. If a Ticket Type/Work Item Type match is not found, the mapping will fail. For your convenience, you have the ability to [map a TeamSupport Ticket Type to a TFS Work Item Type](#) of a different name.

- **Initial “push” of Custom Mapped Fields:** When a New Work Item is created, [Default and Custom Mapped fields](#) are pushed from TeamSupport to TFS. This step does not happen when a Ticket is linked to a Existing TFS Work Item. Future updates made within TeamSupport to Custom Mapped Fields are not sent to TFS.

- **Work Item updates “pushed” to Ticket:** Any changes made to the [Default and Custom Mapped fields](#) in a TFS Work Item will also be changed in the linked TeamSupport Ticket. During setup, you may define the behavior regarding updates to Ticket Type and Ticket Status.

- **Actions and Comments are kept in-sync:**
  - Comments created in the TFS Work Item will also be created in the linked TeamSupport Ticket as Actions. Updates to existing Work Items will not be updated in TeamSupport.
  - Actions created in the TeamSupport Ticket will also be created in the linked TFS Work Item as Comments. Updates to existing Actions will not be updated in TeamSupport.
  - Image attachments (jpg, png, ect.) and other types of files are pushed to TFS from TeamSupport. However, inline embedded images are not considered attachments and therefore not pushed to TFS.
  - You can push all TeamSupport [Action Types](#) to TFS, or only one as defined in [Setup](#).
• **Product/Project Mapping:** The TeamSupport Product and/or Product Version maps to the TFS Team Project. You may create a relationship between the TeamSupport Product and/or Product Version to the corresponding TFS Team Project by indicating the Project Name in the settings in the **Product section.** There is a Project Name field on both the Product level and the Version level. The mapping logic is explained in the [TFS Project/Version mapping section](#).

## Setup

Log into TeamSupport with an account that has Administrator rights and go to Admin->Integration->Team Foundation Server. You should see a screen like this:

![Team Foundation Server](image)

**Important:** Before you setup your link to TFS, please read this important information about how TeamSupport Tickets Types and TFS Work Items Types are mapped, otherwise you may experience initial sync issues.
Field Definitions

• **Instance Name**: Provide a name for this configuration.

• **TFS Host Name**: Required. Enter your full TFS Host Name as described below:
  - For 2015 TFS installed system you should include the protocol (http or https) and the port number if required. e.g. https://[Your Server]:8080
  - Example for VSTS Cloud based system: https://[Your Account].VisualStudio.com. It may be necessary to use the Azure Host Name URL, which must be set to “primary” and can be found in the TFS organization settings page. The format for the Azure Host Name is: https://dev.azure.com/[your organization].

• **TFS User Name**: The User Name and Password OR the API Token is required. Enter the TFS username/email that will be used to create Work Items as described below:
  - For 2015 TFS installed systems your User Name includes your domain in this format: domain\username
  - For VSTS Cloud based system your User Name will be an email address.

• **TFS Password/Confirm Password**: The User Name and Password OR the API Token is required. Enter the password for the TFS account in the Password and Confirm Password fields.
  - For VSTS Cloud based systems it is necessary to use “Alternate Authentication Credentials” for a successful authentication.

• **Use Network Credentials**: This field is required to be checked if you are using the installed TFS 2015 version. Otherwise, you may leave this field unchecked.

• **TFS API Token/Confirm TFS API Token**: The User Name and Password OR the API Token is required. The TFS Security Token can be found in your TFS account. [Here](#) are the instructions for VSTS accounts. The API Token is not available in TFS 2015 installed systems.

• **Default Project Name**: This field defines a default TFS Project. If no Product is assigned to a Ticket and the Ticket is linked with a new Work Item, we use the Project Name specified in this field. The mapping logic is explained in the [TFS Project/Version mapping section](#).
• **Action Type** to push to TFS as comments: Select the “All Types” option if all actions needs to be sent to TFS, otherwise, select one Action Type from the list.

• **Update TeamSupport Tickets Statuses**: If you need to update the TeamSupport Ticket Status whenever the TFS Work Item Status is updated, check this option. It is important to verify that the different TFS States and your TeamSupport Statuses are named the same, otherwise the mapping will not occur.

• **Exclude the following**: A multi-selection box will appear if the “Update TeamSupport Tickets Statuses” box is checked. You may select all status which do not map to your Team Foundation Server.

• **Update TeamSupport Ticket Type**: If you need to update the TeamSupport Ticket Type whenever the TFS Work Item Type is updated, check this option. If your Ticket Types and Work Item Types are named differently, you may map the fields to each other in the Custom Mapping section during setup.

• **Synchronization Active**: Sets the synchronization to active.

• **Always Use Default Project Name**: If you would like to always use the “Default Project Name” listed above, choose “Always Use Default Project Name”. Additional Project/Product mapping logic is explained in the TFS Project/Version mapping section.

• **Use All Ticket Types**: If you would like to allow all Ticket Types to be synced with TFS, leave “All Ticket Types” checked. If you would like to limit the Ticket Types, uncheck this box and select only the Ticket Types that you would like to be allowed to sync with TFS. The TFS box will only show up on tickets that have the selected Ticket Types.

• **Save**: Click the save button to save your changes.

• **Custom Field Mappings**: After you mark your synchronization as “Active”, your Custom Field Mappings will appear to the right of your other settings. These will allow you to map additional Ticket fields other than the defaults, including Custom Fields and Ticket Types.

### Default Field Mapping

Below are the list of fields that are mapped between TeamSupport and TFS.

<table>
<thead>
<tr>
<th>TeamSupport</th>
<th>TFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket</td>
<td>Work Item</td>
</tr>
<tr>
<td>Ticket Type</td>
<td>Work Item Type</td>
</tr>
</tbody>
</table>

* It is important to verify that the different TFS States and your TeamSupport Statuses are named, otherwise the mapping will not occur. Additionally, when creating a New TFS Work Item, the TeamSupport Ticket Type must match the TFS Work Item Type. Please be aware that in in TFS, Work Item Types may also be dependent on the selected Project. Therefore, a successful Ticket Type/Work Item match may also be dependent on a Product/Project match. If a Ticket Type/Work Item Type match is not found, the mapping will fail. For your convenience, you have the ability to map a TeamSupport Ticket Type to a TFS Work Item Type of a different name.*
The TFS Team Project is mapped according to the following logic based on ticket fields/values:

1. If the field “Always Use Default Project Name” is defined, the “Default Project Name” value will be used in the TFS mapping for all tickets.
2. The ticket page has a field called “Reported Version”. If a Version is selected for this field, and that Version has a Project Name value defined, that value will be used in the TFS mapping for that ticket.
3. If the ticket has a Product selection and that Product has a TFS Project Name value defined, that value will be used in the TFS mapping for that ticket.
4. If the ticket has a Product selection, but that Product does not have a TFS Project Name value defined, the Product name will be mapped to the TFS Project Name for the TFS mapping for that ticket.
5. Finally, if the ticket being sent to TFS does not have a Product, and there is a Default Project Name value assigned, this value will be used in the TFS mapping for that ticket.

Additional Field Mappings (Optional)

After you mark your synchronization as “Active”, your Custom Field Mappings will appear to the right of your other settings. These will allow you to map additional Ticket fields other than the defaults, including Custom Fields and Ticket Types.
Field Definitions

- **Mapping Type:** You may choose between “Ticket” and “Ticket Type”.
  - Choosing “Ticket” will allow you to map Standard and [Custom Ticket fields](#) found within TeamSupport.
  - Choosing “Ticket Type” will allow you to map your [Ticket Types](#) from TeamSupport to your Work Item Types in TFS. Mapping these fields will allow you to have the mapped relationship even if your Ticket Types and Work Item Types are named differently.

- **TFS Field:** Enter the reference name for your TFS Field.
- **TeamSupport Field:** Select the corresponding TeamSupport Field from the list.
- **Add Mapping Button:** Click this button to add the mapping and the mappings will display below. The mapping can be deleted at any time by clicking the “x” to the right of the mapping as displayed in the image above.

### Linking Tickets and Work Items from the Ticket Window

Once setup is complete, a TFS link section will become available on the right hand side of an existing Ticket. This option is not available on a new Ticket.

If you do not see this option on the right hand side of an existing Ticket, or if you would like to change it’s position, you may do so in the [Ticket Page Order menu](#).

Once a sync has been made, if you need to make a change to the Product selection, you will be prompted to first remove the TFS sync from the ticket.

### Creating a New Work Item

Clicking the “New Work Item” button will add the ticket to the queue to sync and the Work Item Title will display “Pending…”. When this process is complete, the box will change from “Pending…” to the TFS Work Item ID with a link. The “Work Item ID” is equivalent to the “ID” field found within TFS.

*A successfully created Work Item is heavily dependent on [Setup](#) and [Field Mapping](#). If your new Work Item is not created, see the [troubleshooting section](#).*
Linking an Existing TFS Work Item

Clicking in the “Existing Work Item” button will allow you to enter the Work Item ID to sync with. The “Work Item ID” is equivalent to the “ID” field within TFS.

![Existing TFS Work Item ID:](image)

Enter the number and click on the Save button. The Work Item will be displayed in black font without a link to TFS. Once the sync has taken place a new remote link will be added to the synced TFS Work Item. Additionally, the TeamSupport ticket will contain a link to the TFS Work Item.

Removing a Ticket sync to TFS

You may click the “x” at any time next to the sync in order to remove the link to TFS.

![Work Item Title: Pending... ×](image)

Synchronization Timing

The first synchronization will start after 15 minutes. The next cycle will begin no sooner than 15 minutes. The timing of each subsequent cycle depends on it's place in the queue, which is affected by the number of other items that require processing. Typically the timing of the cycles range from 15 – 60 minutes. Once it is done you should be able to refresh your ticket and see the updated data.

Logging and Troubleshooting

If your tickets are not syncing, you may look for errors in the “CRM Sync Errors” report which can be found in the Reporting Section. Additionally, logging reports can be found in the CRM Sync Logs report.

Additionally, TFS errors may be logged in the Ticket History. Ticket History can be found on the Ticket Detail Page by clicking More -> Ticket History. However, errors will only be reported in the Ticket History if they are specific to the ticket. For example, if the ticket sync has failed due to an authentication issue, these errors can be found in the “CRM Sync Errors” report as described above.
It is necessary to use TFS Alternate Authentication Credentials with your VSTS Cloud based account.

To achieve this, you will need to enable and enter your Alternate Authentication Credentials instead of the account credentials you typically use to sign into your VSTS Cloud based account.

**Setup Instructions**

1. Click on the Manage Security link under actions on the right side of your TFS profile screen.

2. Click on the alternate authentication credentials link

3. Check the enable checkbox
4. Set a password and save it.
5. Finally, Use the same password in the TeamSupport integration screen.
Tortoise SVN

Editions: Enterprise

TeamSupport offers basic integration with Subversion through the Tortoise SVN client.

Setting this up is simple – Just a few changes in the Tortoise properties. Click here to see the Tortoise documentation and how to change their properties.

The specific settings for TeamSupport should be:

- `bugtraq:label TeamSupport`
- `bugtraq:message [TeamSupport Tickets: BUGID]`
- `bugtraq:number True`
- `bugtraq:url https://app.[ServerName].TeamSupport.com/ticket.aspx?ticketnumber=%BUGID%`

When you do a commit in SVN, you will now have the ability to associate ticket numbers (you can input multiple tickets, just separate with a comma) in the commit window. When you open the commit log, the ticket numbers will be hot links and you can click on them to open the ticket in TeamSupport.

Future integration with SVN: We are planning to support post-commit hooks in a future release which will do some automatic processing on the tickets themselves.

Other source control systems: We have tested and verified this implementation with the Tortoise SVN client. While we are sure it will work with other clients and source control systems, we have not yet tested these. However, we would love to get your feedback (support@teamsupport.com) if you successfully integrate with another system.

TeamSupport has also done integration with BeanStalk, a hosted SVN provider.
When someone mentions your twitter account in a tweet, or one of your followers sends you a DM (direct message), twitter can be set to send out an email to the address of your choosing.

To have these notification emails create a ticket in your account:

1. From the Twitter website, click on the cog wheel icon in the upper right, then click settings:

2. Make sure your Twitter account email address is either one that forwards to your TeamSupport account, or your TeamSupport System Email address itself (which can be found under Admin/Email tab at the top of the page).
3. Referencing the image above click on Email notifications to the right. There are many options for you to choose here, and be aware, each time an email is sent, a new ticket will be created in your account.

Below are the settings we use in our account. This means anytime a follower sends us a DM or @teamsupport is mentioned in a tweet, a ticket will be created.
If you want to organize these tickets, you can create an automation rule.

1. Set a condition that looks at Ticket Name and use the “contains” clause for the word Twitter.
2. Next define an action or actions to take. Perhaps you want to assign it to the “Twitter Group”. You will first need to go to the Groups section and make a new group called Twitter. Once that is done, the rule would look like this: Ticket Name Contains Twitter, then the action would be to Assign to Group Twitter.

You can also flag these tickets, assign them to a certain person, and so on if you like. There are many things you can do with Ticket Automation.
TeamSupport has native integration with Zoho CRM so that company, contact and product information can be synced from your Zoho account into your TeamSupport account, and ticket information can be sent back to Zoho. This integration allows your company to use best of breed solutions for sales, marketing and contact management as well as customer service and support!

**Setting up the Integration:**

**Important Note:** After June 30, 2012 the Zoho API Key, that has been used until now, will no longer allow users to connect to Zoho CRM. Because of this, all our Zoho CRM users are required to generate and save in the TeamSupport Integration Settings page the new Zoho CRM Authentication Token as directed in the following instructions. For more details regarding this change visit Zoho’s [authentication token introduction page](#).

Generate your Zoho CRM Authentication Token key:

1. Build the token generation URL replacing in the following string the and with the Zoho CRM username or eMail Id and the Zoho CRM password respectively.

https://accounts.zoho.com/apiauthtoken/nb/create?SCOPE=ZohoCRM/crmapi&EMAIL_ID=&PASSWORD=

e.g.

For eMail Id = “account@domain.com”
and password = “p@$sW0rd”
The token generation URL will be:
https://accounts.zoho.com/apiauthtoken/nb/create?SCOPE=ZohoCRM/crmapi&EMAIL_ID=account@domain.com&PASSWORD=p@$sW0rd

2. On an internet browser window copy and paste the token generation URL and press Enter.

3. Copy the authentication token.
Add it to TeamSupport:

1. Go to Admin/Integration tab and expand the Zoho section and fill out the fields below:

   - **Zoho User Name**
     - `account@domain.com`

   - **Password**
     - Password

   - **Confirm Password**
     - Password

   - **Zoho API Key**
     - Key

   - **Confirm API Key**
     - Key

   - **New Zoho CRM Authentication Token**
     - Paste your token here

   - **Confirm new CRM Authentication Token**
     - Paste your token here too

   - **Account Type to Link to TeamSupport**
     - Customer

   - **Synchronization Active**
     - Select the checkbox

   - **Pull-In Customer Products**
     - Select the checkbox

   - **Give portal access to customers imported (advanc)**
     - Select the checkbox

   - **Send welcome email to imported contacts**
     - Select the checkbox

   - **Save**

The “Account type to link to TeamSupport” field allows you to select the Account Types you will use in Zoho CRM to mark which companies you want brought over to your TeamSupport account. Generally people use “Customer”, but you can change this to whatever you want. Please note that capitalization does matter here,
so “customer” is not the same as “Customer”. You can also identify more than one Account Type by using a comma to separate them as shown above.

You can also put in the word “NONE” (no quotes) and we will import all accounts/contacts that have no account type defined in your CRM.

**Pull-In Customer Products:**

This option will bring the products associated with each account. If the product is found already associated with the account no change will be made. If the product is missing in the list of associated products, it will be added to the customer products. If the product to be added does not exist in the list of products in TeamSupport it will be added in this list also. The products that are not associated to the accounts being imported will not be included in the TeamSupport products list.

**The Integration in Action**

Once you’ve followed the steps above, your integration should be active. Now you can go into Zoho CRM and edit the accounts you would like to sync. The integration runs every 15 minutes, 24/7 so you will not see instant results. Your customers and contacts will begin to appear under the Customer section within your TeamSupport account.

When a ticket is created by your customers, you will see this as a note in Zoho. See below.
A Few Integration Notes

1. Company, Contact and Product information is only synced from Zoho CRM to TeamSupport, not the other way around. If a change is made to a linked contact in TeamSupport, it will be wiped out the next time the integration service runs. We suggesting using your CRM as the main source for contact info.

2. In order for a contact to be brought over into TeamSupport, they must have a valid email address defined within Zoho CRM.

4. Customers can take 15 minutes to show up so once you setup the integration, be patient. After 15 minutes, refresh TeamSupport and you should see the customers begin to appear. Your TeamSupport account will run 24/7/365 scanning for updates. So the next time you go to the customer section in TeamSupport, your Zoho CRM customers should be there. You can also reference a report called CRM Sync Logs within the Reports section of your account to see recent activity.

Fields we are mapping from Zoho:


**Companies:**
Name
Shipping Street
Shipping City
Shipping State
Shipping Code
Shipping Country
Phone
Fax

**Contacts:**
Email
FirstName
LastName
Title
Phone
Mobile
Fax

**Products:**
Name

**Custom Field Mapping**

You can also map fields between Zoho and TeamSupport. The field mapping is between Accounts in Zoho with Companies in TeamSupport, and Contacts in Zoho with Contacts in TeamSupport.

Simply choose the Mapping Type (Account or Contact), then enter the Zoho field name, then enter the TeamSupport field you wish to map to. As a best practice, if you are syncing a pick list, make sure both lists are the same, this way if you change a value in Zoho, the correct one will be chosen in TeamSupport.
As always, if you have any problems or need help with the integration, please email support@teamsupport.com or give us a call at 800.596.2820.
Integration Overview

TeamSupport offers powerful reporting and charting capabilities through an integration with Zoho Analytics. Through this integration, you can create custom reports, charts, and dashboards using TeamSupport data. You can also create a custom dashboard which you can share throughout your organization.

Once the integration is set up, TeamSupport will automatically update Zoho Analytics in near real-time so the data will be fresh and not time delayed.

Zoho Analytics is an add-on to your TeamSupport account. Zoho offers free and paid plans which can be purchased directly from Zoho. Two limitations to the Zoho account which should be considered are:

- The free account is limited to 10,000 total records. Smaller TeamSupport accounts will be able to use the free account, however, that threshold can be reached fairly quickly on medium to large accounts.
- Zoho Analytics supports a maximum of 100 plain text Ticket fields (including Custom Fields). If the field count exceeds 100, an error will be produced. If this Zoho limitation does not accommodate your needs, please contact TeamSupport. We can suggest alternatives that involve using our API and other BI solutions.

Setup

1. Create an account or sign in at https://www.zoho.com/analytics/
2. At the Home screen, click “Import your Data”
3. Click on the “Create Blank Workspace” link and name the workspace “TeamSupport” (note – it is important that the name is exactly “TeamSupport” otherwise the integration will not work).
Once you have named the workspace TeamSupport, click on the “Create” button and the blank workspace will be created.

- **Get your Zoho Analytics API key**: Once you’ve logged into Zohos Analytics, open up a new browser tab and go to this address:


  You should see a screen similar to the below:
Click “Generate Authtoken”. Copy the token and log into TeamSupport (with an Admin rights user account).
Go to the Admin tab and select the Integration tab at the top. Expand the “Zoho Analytics” section. Paste the value into the Zoho Analytics Authentication Token and the Confirm Zoho Analytics Authentication Token fields as shown below:

Field Definitions
◦ **Zoho Username**: Your email address is recommended, however depending on how you’ve setup your Zoho account, “Username” may be your email address or an actual user name

◦ **Zoho Password**: The password will be your Zoho Analytics account password

◦ **Zoho Analytics Authentication Token**: The Authentication Token will be your Zoho API Key (which you copied from the steps above).

◦ **Grid**: This field has the values “US” and “EU”. The default is US. This value affects the hostname. If US is selected, .com will be used for the hostname, and if EU is selected, .eu will be used for the hostname.

◦ **Send Ticket Custom Fields**: Check this box if you would like to send Custom Ticket Fields to Zoho.

◦ **Active**: Make sure to check the “Active” box in order to start the integration.

**Data**

TeamSupport sends over the following data to Zoho:

- Ticket Table – This is one of the main tables in TeamSupport and contains all of the ticket information. Most reporting will be done on this table. Mapping includes the following fields:

> **Zoho Analytics supports a maximum of 100 plain text Ticket fields (including Custom Fields). If the field count exceeds 100, an error will be produced. If this Zoho limitation does not accommodate your needs, please contact TeamSupport. We can suggest alternatives that involve using our API and other BI solutions.**
All Ticket Custom Fields
TicketNumber
TicketURL
Name
TicketTypeName
TicketSource
Status
Severity
AssignedTo
Customers
Contacts
ProductName
ReportedVersion
SolvedVersion
GroupName
DateModified
DateCreated
DaysOpened
IsClosed
CloserName
SlaViolationTime
StatusPosition
SeverityPosition
isVisibleOnPortal
IsKnowledgeBase
DateClosed
DaysClosed
CreatorName
ModifierName
HoursSpent
Tags
SlaWarningTime
SlaViolationHours
SlaWarningHours
MinsSinceCreated
DaysSinceCreated
MinutesToFirstResponse

- Ticket Status History – Every time the status of a ticket changes, we log a record into this table. This allows you to keep track of how long tickets are kept in certain statuses.
- Portal Login History – This table tracks every time a user logs into your Customer Hub
- Knowledge Base Traffic – Tracks each time a customer views a knowledge base article and what
keyword they used to find the article.

- Chat Requests – Shows each time a user has requested a chat, and if the chat was answered or not

## Sync Times and Logs

Within about 15 minutes the initial data should be loaded into your Zoho account and you will be ready to create graphs and reports in Zoho Analytics. Your workspace will look similar to the following:

Logging can be found in the [Report section](#) within the app in the report “CRM Sync Logs”.
Zapier

Zapier is a service which provides a middle ware for hundreds of applications to communicate with each other. In many cases, using Zapier can allow you to link TeamSupport with a product we may not have written a native integration for, and provide you with a way to connect your various business systems together.

TeamSupport is currently in a beta mode with Zapier and you will need an invitation link to get started. Your invitation link depends on which TeamSupport server you use to login. [What is my Server Name/URL?](#)

The invitation links are listed below:

- NA1: app.teamsupport.com
- NA2: app.na2.teamsupport.com
- NA3: app.na3.teamsupport.com

Here are some examples of commands that you can use as actions or triggers from within Zapier.
For example, you may want to create a ticket manually based on specific emails sent to a Gmail address. Zapier can handle this easily by setting up TeamSupport as a trigger from Gmail, or any other application listed in Zapier.
Ticket Templates

Ticket Templates are configured under Admin -> Ticket Templates tab.

Ticket templates allow you to insert pre-built forms into a ticket’s description. These templates can be triggered by a Ticket Type, an Action Type, or a Custom Field Pick List value selected within the ticket during creation. You can make as many templates as you like in TeamSupport.

With the exception of Action Type, you can also elect to use these templates on the Customer Hub as well. To do this, check the “Visible on Customer Portal” option.

To setup ticket templates, go to the Admin section and select the Ticket Template tab.

Select a Ticket Template

Ticket Type - Feature Request

Enabled
Check this box to enable this ticket template.

Visible on Customer Portal
Check this box to use this ticket template on the customer portal.

Ticket Type • Custom Pick List • Action Type
The Ticket Type template will insert the template into the ticket’s description whenever the ticket type changes.

The Custom Pick List template will insert text into the ticket's description when a pick list value matches the template value.

Select a Ticket Type

Feature Request

When this ticket type is selected, the template will be inserted into the ticket's description.

Template Text/HTML

Describe the functionality of the feature and how it would benefit you.
Field Definitions

• **Enabled**: Check this box to enable this ticket template. This can be changed at any time.
• **Visible on Customer Portal**: Check this box to use this ticket template on the Customer Hub.
• **Ticket Type**: Choosing Ticket Type will insert the template into the ticket’s description based on Ticket Type selection.
• **Custom Pick List**: Choosing Custom Pick List will insert the template into the ticket’s description based on Custom Field Pick List Value selection.
• **Action Type**: Choosing Action Type will insert the template into the ticket’s description based on Action Type selection.
• **Template Text/HTML**: Here is where you can design your template which will display in the ticket description.
  ◦ **Design**: WYSIWYG editor for your template
  ◦ **HTML**: Allows you to edit your template in HTML
  ◦ **Preview**: You can preview your template in this pane
• **Save/Cancel**: Click Save or Cancel when you are finished editing.

If you created a Ticket Template using the configuration in the above screenshot, the ticket would display as follows when “Feature Request” is selected as the Ticket Type:
The TeamSupport application helps your team to provide exceptional customer support. TeamSupport's Customer Hub is an extension of the application which provides a self-service resource area for your customers to manage their tickets and find answers to their questions. Your customers will be able to submit tickets, manage their tickets, manage their organizations tickets, view Knowledge Base and Wiki articles, engage in a forum called Community, and initiate Chats with your Support team.

Related Topics

- [Customer Hub Usage Guide](#)
- [Customer Hub Settings](#)
- [Adding Multiple Customer Hubs](#)
Customer Hub Usage Guide

This document is intended to be provided to your customers, who are the end users of the TeamSupport Customer Hub. The document is provided in Word format so that you can easily make edits according to the settings you have selected, and also to provide a company logo and actual screenshots of your Hub.

You can download this guide here.
Multiple Customer Hubs

Edition: Enterprise

Product Lines allows you to organize many aspects of your TeamSupport account. Along with Knowledge Base Articles, Custom Fields, Email Templates, Ticket Types, and other modules, you have the ability to create an unlimited number of Customer Hubs based on your Product Lines.

Configuring Multiple Hubs along Product Lines will give your Customers a more refined self-help tool than ever before!

A few notes about Multiple Hubs:

- Multiple Hubs are an optional feature. Even if you implement Product Lines, having multiple Hubs is not a requirement. New systems are configured with one default Hub.
- Multiple Hubs can be created without associating a Product Line.
- Customer’s access to the Customer Hub will not change. The URL that is used when an email is sent out of TeamSupport will depend on the Product association of the ticket. A contact will have access to any and all of your Hubs provided that they have a Product/Product Line match to the Hub. Contacts will only have one username and password to Hubs, and once logged into a Hub, they will be able to see all tickets regardless of Product association.
- A customer must have the Product Line associated to their account in order to access a Hub with a Product Line association.
- Each page of each Hub is independently configurable. This means you can add branding to specific Hubs including logos, colors, and CSS independently from other Hubs/pages.
- For each of the new Customer Hub that is created with a Product Line, new Email Templates will need to be built and managed. This allows you to further customize the messaging your customer receives. For example, you can include the same customer logos on your Hub and emails.

Click here to learn how to configure Multiple Hubs.
Transitioning from the Portal to the Customer Hub

In 2016, we began sunsetting the Classic and Advanced Portals to be replaced with the Customer Hub. As of April 2017, existing customers will still see the menu “Classic Portals” in their Admin section, while new customers will only see the Customer Hub.

We are happy that you have decided to transition from the Portal to the new Customer Hub! We have tried to make the transition to the Customer Hub as seamless as possible both from an administrative and from your customer’s perspective.

Your customer’s login credentials will remain exactly the same. There will be no need for your customers to reset their passwords. If they had access to the Portal, they will be granted access to the Customer Hub with the same credentials.

Below are a handful of considerations and steps that will need to be made to complete the transition.

Phasing out the Portal

- Once you decide to use the Customer Hub, this means all of your customers will be directed to the Customer Hub, and your customers will no longer be directed to the Advanced Portal.

- You may have been using an iframe with your Portal. If you have Enterprise Edition, you may utilize an optional cName Redirect URL, so there is no longer a need for an iframe to mask the URL.

- In the Portal, you were able to log in as a Customer by simply visiting the link of your Portal and logging in using your Customer credentials. If you attempt to log in as a Customer, in the same manner, using the Customer Hub, what actually happens is the system recognizes your TeamSupport credentials and logs you into your Customer Hub Admin panel. The easiest way is to log in to the Customer Hub is by using an “incognito mode” on your browser. This way, the Customer Hub does not attempt to recognize you based on your TeamSupport login and will allow you to easily log in as a Customer in the same manner as you are familiar with on the Portal.

Forwarding Portal to Hub

Once you have configured the Customer Hub and followed the steps in this document, new customer emails will contain links to the Customer Hub. However, your customers do still have access to older emails that contain links to your Advanced Portal. They also may have bookmarked your old Portal URL. To help guide your customers to your Customer Hub, we recommend you forward your Portal to your Hub using the “Forward Portal to Hub” feature found in your Classic Portal tab in the Admin panel:
If you have multiple Hubs configured, this feature will allow you to select from available Hubs.

**Email Templates**

The following email templates have links in the body of the email which point to your Portal. You will need to edit the body of these email templates to include the link to your Customer Hub. Your cName Redirect URL should be used, if applicable. If you are not using cName, you should use your Landing Page URL. Click [here](#) for information on where to find your URL.

In the below examples, `[YourCustomerHubURL]` will need to be deleted – including the brackets – and replaced with your URL which may look something like this: https://BitsAndBytes.na1.teamsupport.com.

Here are examples of how your updates might look:

- **Welcome User – Portal:**

  Click `<a href="[YourCustomerHubURL]">here</a>` to login in and change your password.

- **Reset Password – Portal:**

  Click `<a href="[YourCustomerHubURL]/resetpassword/{{PortalUser.UserID}}&{{Password}}">here</a>` to log in.

Additionally, some of your email templates contain the placeholder `{{TicketUrl}}` will need to be changed to the new placeholder called `{{HubTicketUrl}}`.

- **Ticket Update – Advanced Portal:** It is very likely that your Ticket Update – Advanced Portal template contains this placeholder. However, if you modified any other template to include the `@{{TicketUrl}}@` placeholder, those need to also be modified.
Single Sign On (SSO)

If you were using Single Sign On (SSO) with your Portal, you will need to update your code to replace your Portal URL with your Customer Hub Landing Page URL.

When passing this information to the portal, you were passing an authtoken as well as the standard OrganizationID parameter. There is no longer a need to pass the OrganizationID parameter, but the authtoken will be passed in the same manner. The URL behind your “login button” will look something like this for your Advanced Portal:

portal.[ServerName].TeamSupport.com?OrganizationID=1234&authtoken={encrypted authtoken}

You will need to change this to accommodate your Customer Hub. You will need to replace [YourCustomerHubURL] – including the brackets – with your Customer Hub Landing Page URL, and replace [encryptedAuthToken] – including the brackets – with your generated authentication token. It will look something like this:

https://[YourCustomerHubURL]/sso/[encryptedAuthToken]
Mobile App

Introduction

Provide better support to your business customers with the TeamSupport app available for iOS and Android. With the power of the TeamSupport app you can view, assign, and edit tickets on the go, respond to customer requests, collaborate with your team to resolve issues faster, and keep up to date with internal discussions.

* You must be a TeamSupport customer to login and use the TeamSupport app

Installation

Click an image below to be taken to the download, or simply search “TeamSupport” within the app store.
Using the TeamSupport App

Logging In

Username

Type in the same username for the mobile app that you use for your desktop TeamSupport app. If you have multiple TeamSupport accounts, you will be asked to indicate which account you wish to log into after clicking “Next” on this screen.
Password

Type in the same password for the mobile app that you use for your desktop TeamSupport app. If you have forgotten your Password, it can be reset at your desktop TeamSupport app.
Field Definitions

- **Name/Picture:** The name and avatar for the user who created the Water Cooler post.
- **When:** The timeframe when the Water Cooler post was created.
- **Message:** The Water Cooler message.
- **Likes:**
  - **Star/Likes Icon:** A gray star indicates that you have not liked the post, whereas a yellow star means you have liked the post. The star also has a number to the right which indicates how many total likes the post has received. Finally, you may click on the star to see the list of users who have liked the post.
  - **Like/Unlike Button:** You may toggle between Like/Unlike for any post.
- **Replies:**
  - **Replies Icon:** If there have been replies to the Water Cooler post, an icon will appear next to the star icon with the number of replies present. You may click on the icon to view the replies. You may add a reply to the Water Cooler post from this page.
  - **Reply button:** This button allows you to add a reply to a WC post by entering a comment and clicking the submit button.
• **Plus button**: Clicking the Plus (+) button at the bottom of the right hand corner of the Water Cooler window allows you to add a new Water Cooler post.
Awesome job, Team!!
Tickets

Ticket Grid

<table>
<thead>
<tr>
<th>My Open</th>
<th>My Closed</th>
<th>All Tickets</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to find your URL</td>
<td>#2409</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Updated: 04/05/2018</td>
<td></td>
</tr>
<tr>
<td>Help! I can't log in!</td>
<td>#2385</td>
<td></td>
</tr>
<tr>
<td>New • 1A Software</td>
<td>Updated: 03/14/2018</td>
<td></td>
</tr>
<tr>
<td>Zoom Question</td>
<td>#160</td>
<td></td>
</tr>
<tr>
<td>New • A Plus Productions, J4 Inc.</td>
<td>Updated: 12/14/2017</td>
<td></td>
</tr>
<tr>
<td>Zoom Question (Clone)</td>
<td>#1480</td>
<td></td>
</tr>
<tr>
<td>New • A Plus Productions, J4 Inc.</td>
<td>Updated: 12/14/2017</td>
<td></td>
</tr>
<tr>
<td>test</td>
<td>#1644</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Updated: 12/14/2017</td>
<td></td>
</tr>
</tbody>
</table>

Field Definitions

- **Tabs**: There are 3 tabs across the top of the ticket screen which filter your ticket views: My Open, My Closed, All Tickets. There is also a [Search Tab](#).
- **Ticket Name/Ticket Number**: The ticket name and number are displayed along the top of each ticket box.
- **Ticket Status**: The Ticket status is displayed below the Ticket Name.
- **Customers**: If any Customers have been associated to a ticket, they will be displayed next to the Status.
- **Last modified date**: The last modified date posted on the ticket will be displayed.
The Search tab allows you to enter a search phrase found in the Name or Description of a ticket.

**Detailed Ticket View**

Clicking a ticket from any of the tabs will take you to the detailed ticket view.
• **Ticket Name/Ticket Number:** The ticket name and number are displayed along the top of ticket detail page.

• **Editable Ticket Fields:** You may edit the following fields: Assigned User, Type, Status, Severity, Group.

• **View Only Ticket Field:** You may view the Customer field.

• **Actions:**
  - **Name/Picture:** The name and avatar for the user who created the ticket action.
  - **When:** The timeframe when the ticket action was created.
  - **Description:** The body of the ticket action.
  - **Public/Private Flag:** This flag indicates whether the action is public or private.
  - **More button “…”:** The More button contains the following options:
    - **Toggle Public/Private:** Allows you to change the visibility of an action. You may only edit your own actions.
    - **Delete Action:** Allows you to delete an action. You may only delete your own actions.
  - **Plus Button:** Clicking this button allows you to add a public or private action.
More Menu

Under the “More” menu on the bottom right hand corner of the main app window, you will find an option to logout of TeamSupport.
Big Picture Topics

Browse this section to learn more about how to bring different parts of the system together to give your customers the best support experience possible.

Topics include:

- Email – Best Practices
- Web Conversations
- Knowledge Base vs Wiki
- Privacy and Security
Email – Best Practices

While TeamSupport can handle e-mail in a number of different ways, below is a list of recommended e-mail practices:

1. Forward your Support e-mail address to your TeamSupport dropbox. This is easily accomplished on most e-mail systems, but will require your mail administrator to set it up. Once your support e-mail address is forwarded, any new e-mail sent to that address will create a new ticket within TeamSupport.

2. Set your “Organization Reply To” address (located in Admin-EMail) to the address you are forwarding into TeamSupport. This way your customers will see your e-mail address as opposed to the long system email address.

3. When tickets are created in TeamSupport and you want to reply back to the customer, simply add a new action in the ticket and check the “Visible to Customer” checkbox. Any customer associated with that ticket will get an e-mail with the updated information. You can read more about this under Web Conversations.

4. Customize your e-mail templates to include your logo, graphics, and custom colors. This will make your support e-mails look very professional and clean.

5. Create a new status called “Customer Responded” (or similar) and set it’s “EMail Response” value to true. This status will be set whenever an end user updates a ticket via e-mail and will give you an easy way to see when a customer has replied. Note – this has been done for you as a system default but you can change it if you like.
Web Conversations

Web Conversations are a powerful and unique feature of TeamSupport which allows you to get out of the e-mail inbox for managing support issues.

If a ticket has been associated with a specific end user (either they created the ticket via e-mail or via the Customer Hub, or a TeamSupport user has manually associated the ticket with an end user) adding an action and marking the action as “Visible to Customers” will automatically send an e-mail to the customers associated with that ticket. The e-mail will include a complete history of the ticket including all actions marked as “visible”. In addition, if the most recent action has attachments associated with it, those attachments will also be e-mailed.

The power of Web Conversations is that it allows you to support your customers directly from within TeamSupport and does not require that you use an e-mail client for any of your day to day customer interactions.

Click [here](#) to learn more about customer/ticket interaction.
TeamSupport implements a Knowledge Base feature which allows commonly used tickets to be grouped within the Knowledge Base section of the application, and also exposed to users through the Customer Hub. Most people use this as the FAQ.

The Wiki also can be used for customer Knowledge Base information when you set the flag “visible to customers” on a given article however you have the option to create a tree structure on the Customer Hub.
Privacy and Security

TeamSupport delivers top-notch security and privacy of our clients’ information. By utilizing the most comprehensive security technologies available, we are able to ensure that all of your information is safe.

TeamSupport utilizes the latest password technology to keep your data secure. This includes the use of strong passwords, passwords expiration, failed attempts lockout, and optional Two Step Verification. Click here to learn more about Password security.

Click here to read a comprehensive overview of our Privacy and Security policy.

At anytime, you can visit our Status page here.
Help Center

We are here to help!

This documentation site may have the information you need, but it is not your only resource.

Is this a new account? Visit the Getting Started section.

Are you a new user? Visit the Quick Start User Basics section.

Advanced User? Visit the Advanced User Functions section.

Want to see more of what's under the hood? Visit the Advanced Admin Functions section.

Expand your knowledge with Big Picture Topics

Other resources:

From the Help Menu from within TeamSupport (upper right hand corner of screen) you can choose:

• Support Portal – will log you in to our Customer Hub on our website
• Chat with us

Go to TeamSupport.com then click Support. From here you can log into the Support Portal (the same as your TeamSupport login). Quick Links to our Support Portal:

• Submit a trouble ticket here.
• View our Knowledge Base here.

You can also:

• Click here to troubleshoot browser issues
• Send an email to support@teamsupport.com
• Call us at 800/596-2820
Troubleshooting

If you're not seeing what you expect in one of our applications, these quick fixes should get you back on track.

**Empty your browser’s cache**

Clearing your browser’s cache can force recently changed web pages to show up properly. Each browser handles caching differently, so be sure to follow the correct steps for your particular browser. Note: If your browser version is not listed here, Google has more comprehensive instructions covering older versions of these browsers.

**Internet Explorer:**
1. In your browser’s menu bar go to Tools → Internet Options → General → Browsing History → Delete…
2. From this window delete the Temporary Internet Files.
3. Close this window, then select OK before exiting the browser.

**FireFox:**
1. In your browser’s menu bar, go to Tools → Clear Recent History.
3. Expand the “Details” section and check “Cache.”
4. Click the “Clear Now” button.

**Chrome:**
1. In your browser’s toolbar go to Tools → Options → Under the Hood.
2. Click the button labeled “Clear browsing data.”
3. Select the checkboxes for the types of information that you want to remove.
4. Click “Clear browsing data.”

**Safari:**
In the Mac OS X menu bar, go to Safari → Empty Cache.

**Remove stale cookies**

A cookie is a piece of text stored by your browser to help it remember your login information, site preferences, and more. If you are having problems with one of our sites, deleting your cookies will reset your preferences to their default values.

Note: On Firefox, Chrome, and Safari, it is possible to search for and delete only your teamsupport cookies. On Internet Explorer you will have to delete all cookies.
**Internet Explorer:**
1. In your browser’s menu bar, click on “Tools.”
2. Click “Internet Options…”
3. Under “Temporary Internet Files” on the General Tab, click “Delete Cookies.”
4. Click “Ok” on the dialog box that says, “Delete all cookies in the Temporary Internet Files Folder?”
5. Click “OK” to exit.

**FireFox:**
1. In your browser’s menu bar, click on “Tools.”
2. Click “Options…”
3. Click on the “Privacy” tab.
4. Click on “Show Cookies…”
5. Depending on the products you use, look for cookies with teamsupport.
6. Select them and click “Remove Cookie.”
7. Click “Close” to exit.

**Chrome:**
1. In your browser’s toolbar go to Tools → Options → Under the Hood.
2. Content settings in the “Privacy” section.
3. On the “Cookies” tab, click Show cookies and other site data.
4. Click Close for the Cookies and Other Data dialog when you’re done.

**Safari:**
1. In the Mac OS X menu bar, select “Safari.”
2. Click “Preferences…”
3. On the “Security” tab, click “Show Cookies.”
4. Click on “Show Cookies…”
5. Depending on the products you use, look for cookies with teamsupport.
6. Select them and click “Remove.”
7. Click “Done.”
8. Close the Preferences box.

***Make sure your browser is up-to-date***
To get the most out of our products, we recommend keeping your browser up-to-date. Modern browsers typically render pages faster, support richer interactivity, and offer enhanced security to keep your data safe. Plus, knowing that you have a newer browser means we can spend less time squashing bugs and more time improving your experience. We support the following browsers:

**IE11 or later**
**FireFox**
**Chrome**
**Safari**
Check your internet connection

Can you access other major web sites?
If you're having trouble accessing one of our sites, try visiting Google, Yahoo, or Apple before submitting a support request. If these sites fail, you may have a more serious connection issue — try our other connection tips below.

Assuming those major sites show up fine, it’s time to verify whether other people can access our products. To look into that, be sure to visit our Status Page.

Try another browser
Extensions or other software may occasionally corrupt your browser, leading to unexpected behavior. Before making changes to your primary browser, try accessing the internet with another browser like Chrome or Firefox.

Check your anti-virus and firewall settings
Still having issues no matter which browser you’re using? Try disabling your anti-virus software — corrupt or partially-uninstalled software can break your access to the internet. Also try disabling your firewall temporarily to see if that helps.

If you continue experiencing issues even with anti-virus and firewall disabled, it’s time to check your connection to the network.

On Wi-Fi? Make sure you’re connected.
Wireless hotspots are great, but they’re not always reliable. If you’re using wi-fi but having connection issues, start by verifying your connection to the base station. Are you connected to the base station you expect or did your computer pick up someone else’s signal? Did you enter the correct password?

If you’re on the correct base station and the password checks out, try looking into your signal strength. If it’s relatively weak, try moving closer to the hotspot and try accessing the web again.

Good signal but still having issues? It may be time to restart the base station and try again in a few minutes.

Restart your modem and your router.
When all else fails, it’s time to check the hardware that connects you to the internet in the first place. If you can access the modem and the router, you’ll need to disconnect them from their power source (the power button often just puts them in standby).
Once you’ve powered down the modem and router, wait 10-15 seconds, then plug the modem back in, followed by the router. Allow time for both to boot up and connect by watching the activity lights, then try connecting to the internet again on your computer.

**Still having a problem?**

Submit a ticket [here](#).