

# BLUE CHAMELEON : Customer Support

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*download the relevant chapter or the **Blue Chameleon Full Documentation**.*

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# Chapter 8

## Customer Support

The right and convenient way of handling customer complaints and requests through Blue Chameleon's Ticket System will be unveiled in this Chapter.

All commands explained in this section are accessible from **Add-ons** / **Helpdesk**.



*Helpdesk access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[Menu script user rights :] Helpdesk*

### 8.1 Helpdesk setup guide

The following guide mainly refers to functions explained in *Advanced Functions and Configuring* (10).

1. creation of ticket types (10.2.1) and their related categories and parameters (10.2.2.1) ;
2. if to be used in the future, creation of predefined emails (10.2.2.2), texts (10.2.2.3) and durations (10.2.2.4) ;
3. creation of ticket styles (10.3) ;
4. editing user details for helpdesk (10.4) : style, rights and ticket types ;
5. editing user group details for helpdesk (10.5).

## 8.2 Ticket purposes and basics

The Blue Chameleon Ticket system has two main primary goals :

- to keep a record of your Customer Support service's activity, that is to say the clients' problem descriptions as well as the different steps taken to solve them ;
- to efficiently plan the resolving of client problems according to their priority and the date of their issuing.

### 8.2.1 Creating a ticket



**Successful ticket creation requires a defined ticket type category and parameter (10.2.2.1).**



User right for ticket creation can be set up either at the *Modify User Page* (Fig.9.17) or the *User Right Page* (11.2) under the element

[*Custom script user rights :*] Insert client ticket

Once a complaint is received, issuing a ticket is done via the main *Customer Support Page*. From this page as accessible via **Add-ons** / **Helpdesk** and featured in Fig.8.1, simply click on the **New ticket** button to choose the client that issued the complaint.

Once it is done, you will be brought back to the *Customer Support Page* and see the aforementioned button has changed into **New ticket : Smith.John** (in this example) ; it leads to the *New Ticket Page* (Fig.8.2), which lists the client's main data.

There :

- select a ticket type (10.2) and a subsequent ticket parameter (10.2.2.1) to assign to this ticket ; the request in the chosen example is a 'Customer' ticket, of the parameter 'Product' ;
- ticking the Notification Email box allows you to send a mail to the client ; if so, the title menu will provide predefined notifications (10.2.2.2) to choose from ;
- Once you are done, finally click on the **Create** button ; this will definitely create your ticket, as well as leading you to the *View Ticket Page* whose details are fully explained at 8.3.3.

Tickets can also be created when an Agenda appointment is added (7.2.3.1), provided that the corresponding agenda supports ticket assignment (7.2.2.3.1).

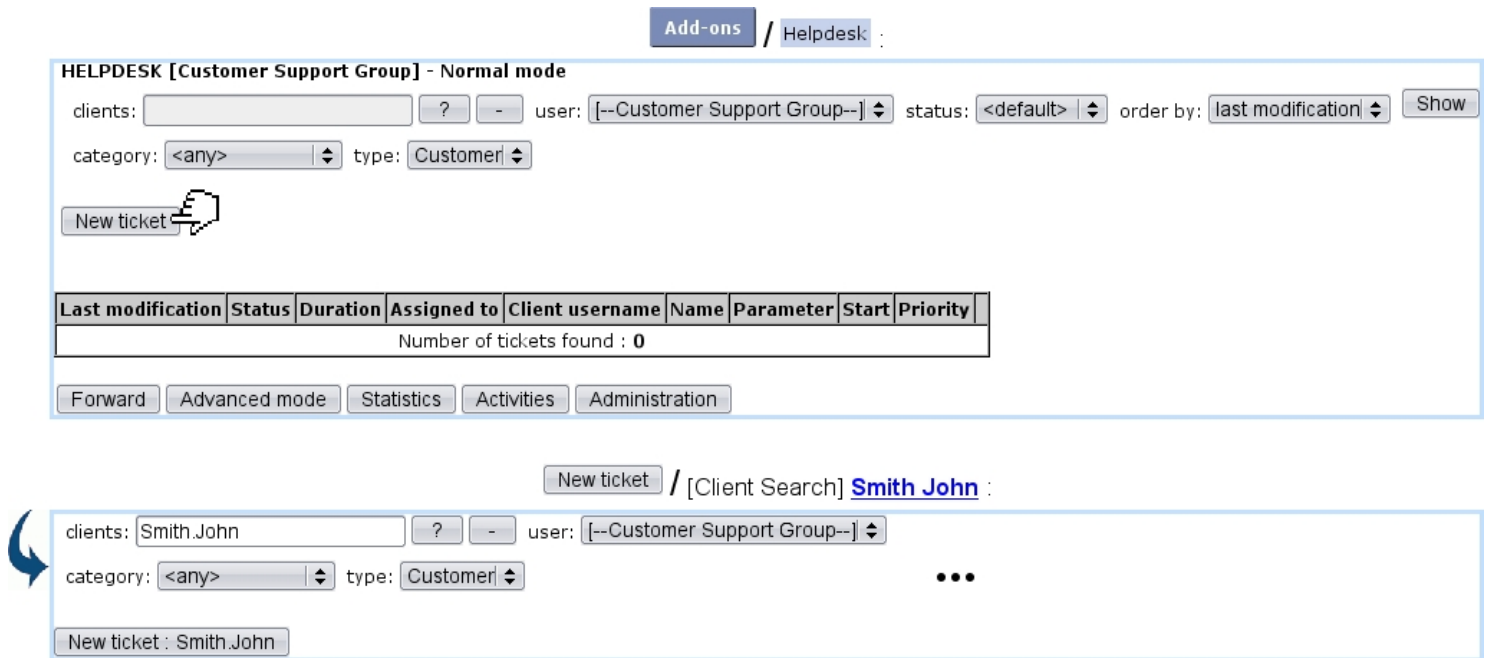


Figure 8.1: The main *Customer Support Page*, ready to create a ticket for client John Smith.

## 8.2.2 Creating tickets for other objects (In Development)

The above described how to create a ticket for a client ; it is to note that Blue Chameleon also allows to create tickets pertaining to other objects, such as prospects (7.9.3), articles, subscriptions, invoices and orders.

In order to create a ticket pertaining to any of these things, the page accessed via **New ticket** or **?** provides at the bottom an **Other object** button leading to what is seen at Fig.8.3.

## 8.2.3 Ticket statuses

Ticket statuses are five :

- new, which is the default status when the ticket is created ;
- open, which is the status a 'new' ticket can be changed to in order to mean it has to be processed ;
- client pending ;
- event pending, which puts the ticket in stand-by until a call-back date, set thanks to a calendar that pops-up when this status is validated ;
- closed, which serves to mean that the issue has been resolved.

New ticket : Smith.John :

**HELPDESK [Customer Support Group]**

Client username : **Smith.John** Ordered articles

Name : **Smith John**

Address : **12 Orange Road**

Post code : **90000** City : **Los Angeles**

Country : **USA**

Tel. number : **555 1234**

Email : **john.smith@mailserv.com**

Payment status : **First reminder**

Language : **English**

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Ticket type :

Complaint :

---

Email Notification

Email :  Title :

---

**Dear Sir/Madam,**

**Your request is currently being processed.**

We thank you for your patience.

**Kind Regards**

---

SMS Notification

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Figure 8.2: The *New Ticket Page* displaying client information and allowing to pick ticket type parameter and to type a notification email to the issuing client.

## 8.2.4 Ticket duration

Ticket durations, according to the choice made for the relevant ticket type (10.2.1) can be optional and be chosen in a menu as predefined in the Helpdesk administration (10.2.2.4). Their goal is to add to a ticket, anytime an action (8.4) is performed, a time attribute, **corresponding to the estimated time the action will take.**

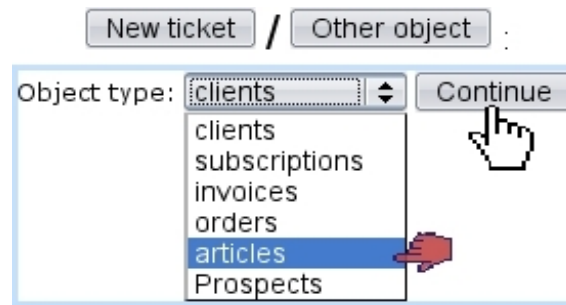


Figure 8.3: Creating a ticket for any object, pertaining to people (clients, prospects (7.9.3.1)), items (articles, subscriptions), invoices, orders...

As actions on a single ticket follow each other, duration builds up and is featured at the Ticket Table (8.4).

### 8.2.5 Ticket priorities

Tickets, if the related ticket type allows it (10.2) may be assessed different priorities, that are chosen from previously-defined service level agreements (9.5). As seen on Fig.9.19, for instance three SLAs/priorities 'Normal', 'Priority' and 'Urgent' can thus be defined.

As a rule, on the ticket table as illustrated on Fig.8.4 below, tickets are sorted :

- first by their priority (if the ticket type they belong to actually has one) according to the level given to the corresponding service level agreement : in this case 'Urgent' tickets will appear first ;
- then, by their last modification date, also in descending order (last modified ticket first).

If a ticket has a defined priority, user will allowed to edit it according to her/his particular Helpdesk settings (10.4.1) and the available priorities to choose from then depend on user's commercial access levels (11.1.1.3).

## 8.3 Searching for tickets and displaying them


As the number of tickets grow, they might become more and more difficult to go through ; therefore, Blue Chameleon supplies extensive search options to look for them.

### 8.3.1 Different ways to look for tickets


Once tickets have been created, the main *Customer Support Page* displays them, as pictured in Fig.8.4 which shows the ticket created above ; the [View](#) links at the end of the table lead to the corresponding ticket's *View Ticket Page* (see below).

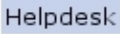
It is also possible to search into them after having chosen criteria for which you wish to see corresponding tickets. First, you have to be sure that the user's 'Menu View:' is

set to 'Client Search' (10.4.1) to have all search options.

If for instance you want to see tickets pertaining to a specific client, just click the  button, which will lead you to a *Client Search Page* ; after having clicked on the aimed client's name, you will be brought back to the *Customer Support Page* and tickets for this client will be displayed.

Another way of achieving this is via the  button while at the *Client Management Page* (2.3) for this client.

By the help of three drop-down menus, you can also run a search by specifying the user to whom the ticket has been assigned, its current status and type and finally  for results.

 :

Last modification	Status	Duration	Assigned to	Client username	Client	Parameter	Start	Priority	
1/6/2010 9:40	new	0 min.	James	Smith.John	<a href="#">Smith John</a>	Product	1/6/2010 9:40	Normal	<a href="#">View</a>
Number of tickets found : <b>1</b>									

Figure 8.4: The *Customer Support Page*, displaying the recently-created ticket for client John Smith. The [View](#) link at the far right of the table leads to the *View Ticket Page* (8.5) for this particular ticket.

### 8.3.2 Styles for displaying tickets

In the ticket table as shown in Fig.8.4, in order to distinguish between tickets of different types, different displaying options (colors for background and font, font styles) can be assessed to each ticket type : this is accomplished from the *Ticket Administration Page* (10.3).

Also, two tickets belonging to the same type can be made to appear differently (10.12).

### 8.3.3 The *View Ticket Page*


This page is accessed just after the creation of a new ticket and also by clicking the corresponding [View](#) link from the *Customer Support Page*. This page for the current example is featured at Fig.8.5 ; it displays the ticket's information, mainly consisting in :


- the ticket's ID ;
- the start date and time, at which it is created ;
- the date and time at which it was last modified ;
- its duration (8.2.4) ;

- the ticket type (10.2) and the parameter (10.2.2.1) you defined it to be.

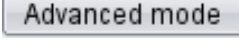
There are also properties that can be modify via drop-down menus :

- the ticket's status (8.2.3) ;
- the user to whom it is assigned : by default, the creating user, but it can be changed according to the actions to take (see Fig.8.7 for an example) ;
- the ticket's type (if ticket type allows to, 10.2.1)
- the ticket's priority (if : ticket type allows to (10.2.1) and user is allowed to, 10.4.1) ;
- the visibility of the ticket (if ticket type's visibility is set to 'private or public' or 'public or private, 10.2.1).

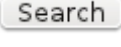
Any change is to be validated via the corresponding buttons, respectively , , ,  and .

Also available is the  button, whose great utility will be explained in 8.4.

### 8.3.4 Ticket display details - The Advanced Mode

The Advanced Mode is a display mode that is switched on by clicking the  button at the bottom of the main *Customer Support Page* (this button is only available if the user's 'Menu View:' is set to 'Search Criteria' or 'Client Search' (10.4.1)).

On this Mode, you now have two more options to display tickets, as drop-down menus : the user who opened the ticket and the number of tickets displayed, 50, 100, 200, 500 or all of them (the previous mode, Normal Mode displays 50 tickets).

Once you have chosen your options, refresh displaying via . You can go back to the Normal Mode any time by clicking the same button which brought you here : this button indeed toggles between Advanced and Normal modes.



(...) [Smith John](#) (...) [View](#) :

**HELPDESK [Customer Support Group] - View ticket(232)**

Ticket ID : **232**  
Start : **2/1/2012 9:40**  
Last modification **2/1/2012 9:40**  
Duration : **0 min.**  
Status : **new**   
Opened by : **James**  
Assigned to : **James (Customer Support Group)**   
Type : **Customer**   
Complaint : **Product**  
Display :  **default**  
Font :  **default**  
Priority :    
Visibility :

---

**[Client general information]**

---

2/1/2012 9:40 James 0 min.

[Notification by email :  
Dear Sir/Madam,  
Your request is currently being processed.  
We thank you for your patience.  
Kind Regards]

Figure 8.5: The *View Ticket Page*, enabling to execute all of ticket-related activities.

## 8.4 Processing a ticket : an example

Once a ticket is created, according to the evolution of the situation, it is possible for you to *act* on the ticket. This *Add Action in Ticket Page* can be accessed via  , a button which is available at any *View Ticket Page* (8.5).

Adding an action on a ticket is done whenever you need to change its status or assign it to an other user ; therefore, the action's main purpose is to keep an historical track of everything (status changes, assignments) that has been done in the ticket to solve it.

In the current example, the user (James) that created the ticket has first to declare

the ticket as 'open', and also to conveniently add a description of the problem that client John Smith complained about (Fig.8.6). As seen there, whether the action is billable or not is shown and a duration can be entered ; these two items depend on ticket type (10.2.1). Also, a **red & bold** button allows to place HTML tags that will make the action text appear in such style.

[View Ticket Page] **Add action** :

Comments :	Smith's complaint : Cheddar Cracker box (s/n : Box 2) contained a 'dead bug'. Supplier : Food Corps, Ltd
Status :	Open
<input type="checkbox"/> Email Notification	
<input type="checkbox"/> SMS Notification	
<b>Create</b>	<b>Cancel</b>

Figure 8.6: The 'new' ticket is set to 'open' and also a comment consisting in the problem's description is given for the record.

A notification email is not sent to the complaining client because no meaningful event occurred yet.

As the complaint is about a manufactured product coming from a supplier, Customer Support group member James then decides to forward the ticket to Mary, member of the External Relations group (Fig.8.7).

[View Ticket Page]

[External Relations] Mary **Update assignment**

Figure 8.7: Ticket is forwarded to External Relations group member Mary.

Mary (who had enabled displaying of a 'Customer Support' Event Control, 1.3) then receives the alert that a new ticket has been assigned to her ; she contacts the supplier Food Corps, Ltd and at the same time informs the client that his complaint has been sent (Fig.8.8).

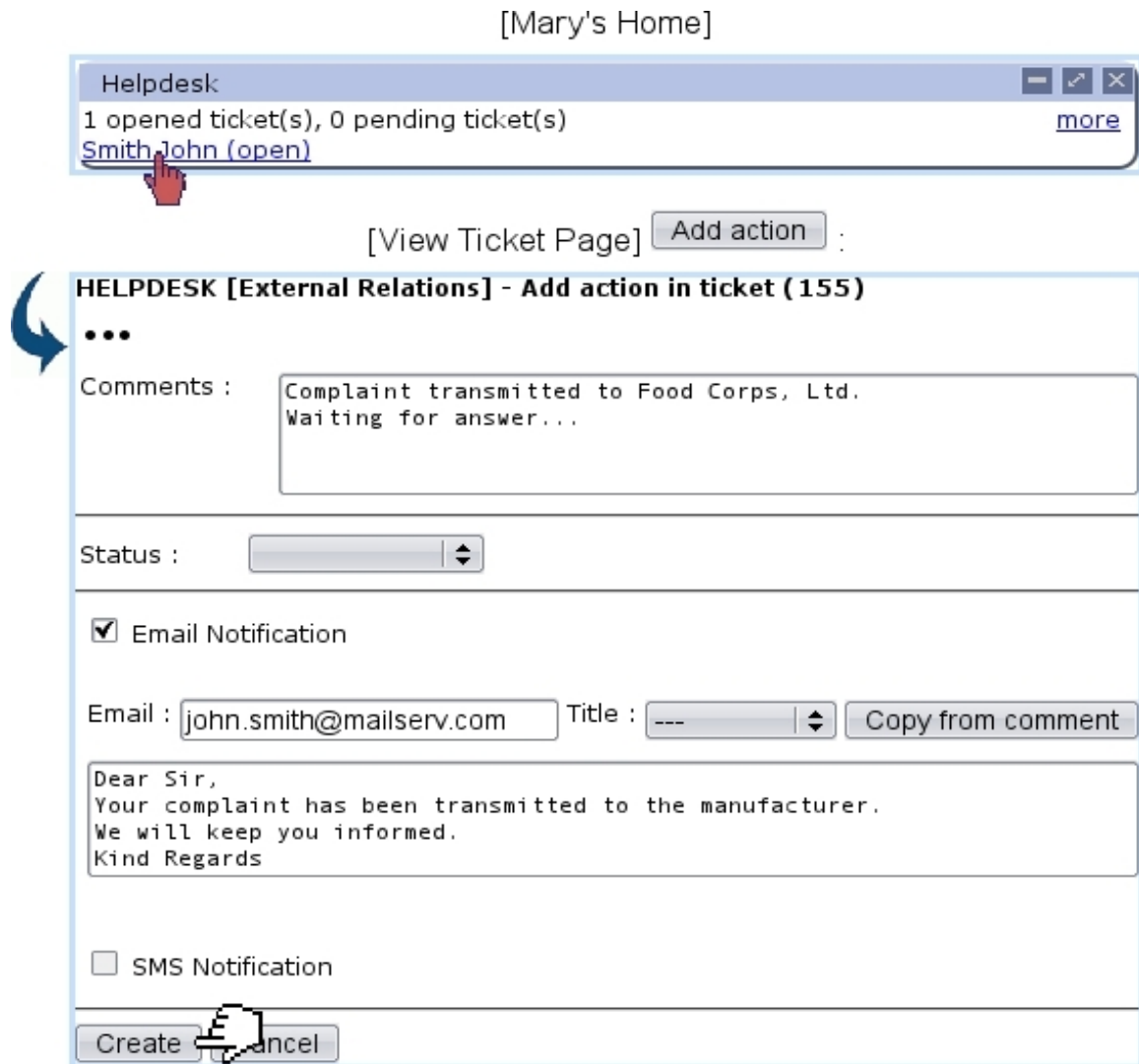


Figure 8.8: User Mary receives ticket and processes it according to her External Relations skills, and also informs client.



The **Copy from comment** button as seen on Fig.8.8 can be used to directly put in the Email field what was typed in the 'Comments:' field.

After a while, now with the answer of the supplier, Mary adds another action (comment : "FC Ltd apologized for mishap and reinforced quality controls. Client is proposed free tour of the factory with gifts.") and, as her work here is finished, she assigns the ticket to James, who adds a last comment while sending a final notification to the client and also closing the ticket (Fig.8.9).

[James' View Ticket Page for this ticket]

Comments :


Status :

Email Notification

Email :  Title :

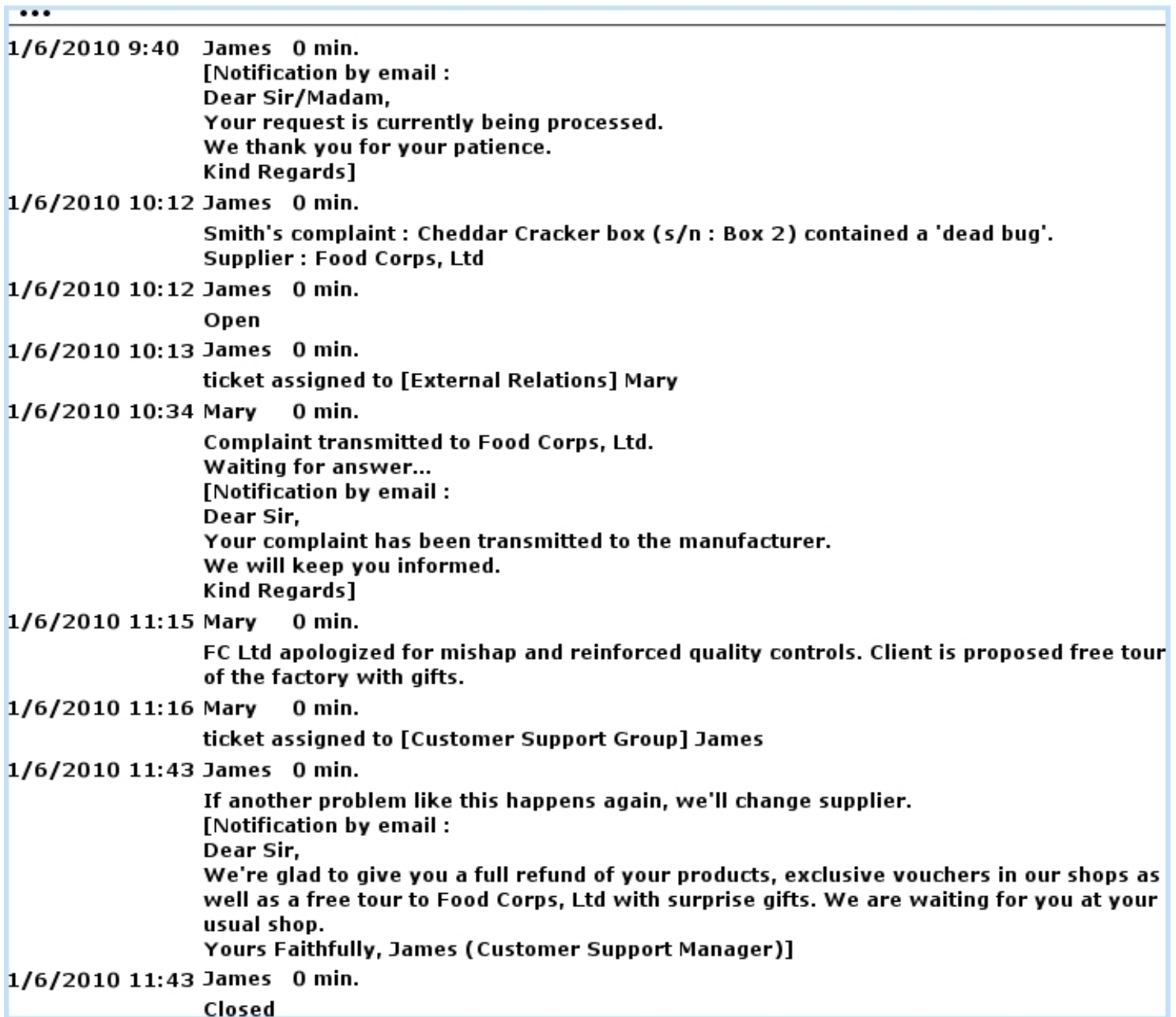
SMS Notification

Figure 8.9: Problem is solved and therefore ticket is closed.

 *To each action, any kind of file can be attached via the  button (provided that related ticket type allows it, 10.2.1).*

Blue Chameleon keeps track of all comments, status changes, notifications email at the bottom of the *View Ticket Page*. This log is useful to follow the solving of a problem from the beginning to the end (thus making faster the solving of ulterior problems of the same kind) and keep records of clients' problems.

For the example above, the full log is shown at Fig.8.10.



1/6/2010 9:40	James	0 min.	<b>[Notification by email : Dear Sir/Madam, Your request is currently being processed. We thank you for your patience. Kind Regards]</b>
1/6/2010 10:12	James	0 min.	<b>Smith's complaint : Cheddar Cracker box (s/n : Box 2) contained a 'dead bug'. Supplier : Food Corps, Ltd</b>
1/6/2010 10:12	James	0 min.	<b>Open</b>
1/6/2010 10:13	James	0 min.	<b>ticket assigned to [External Relations] Mary</b>
1/6/2010 10:34	Mary	0 min.	<b>Complaint transmitted to Food Corps, Ltd. Waiting for answer... [Notification by email : Dear Sir, Your complaint has been transmitted to the manufacturer. We will keep you informed. Kind Regards]</b>
1/6/2010 11:15	Mary	0 min.	<b>FC Ltd apologized for mishap and reinforced quality controls. Client is proposed free tour of the factory with gifts.</b>
1/6/2010 11:16	Mary	0 min.	<b>ticket assigned to [Customer Support Group] James</b>
1/6/2010 11:43	James	0 min.	<b>If another problem like this happens again, we'll change supplier. [Notification by email : Dear Sir, We're glad to give you a full refund of your products, exclusive vouchers in our shops as well as a free tour to Food Corps, Ltd with surprise gifts. We are waiting for you at your usual shop. Yours Faithfully, James ( Customer Support Manager)]</b>
1/6/2010 11:43	James	0 min.	<b>Closed</b>

Figure 8.10: Full history of the current example ticket's solving.

## 8.5 Checking time evolution of ticket-related data

User activities and statistics are the two ways in which Blue Chameleon users can check the quantitative aspects of tickets.

### 8.5.1 User activity

It is possible to check a ticket-wise user's activities at any day via the **Activities** button as found at the bottom of the main *Customer Support Page*. On the then displaying

*Activities Page*, two drop-down menus let you input a specific user and day. Every ticket that has been acted on will be listed (displayed inbetween time gaps of 15 minutes) as a click-link leading to its full description.

Fig.8.11 illustrates this page for user James on the day of the example case above.

## 8.5.2 Ticket statistics

Also available from the main *Customer Support Page*, the **Statistics** button leads to a page shown at Fig.8.12 which will allow you to check ticket statistics by displaying tables featuring ticket types, categories, statuses... Dates inbetween which to check ticket statistics can be chosen, as well as the issuing user group.

Several displays are then available, cleared up below.



*For a user group to appear in the menu, it must be an 'open' group (9.4.1).*

### 8.5.2.1 'Global Statistics:'

It features a table of the total number of tickets, sorted horizontally by their status and vertically by their type (Fig.8.13).

### 8.5.2.2 'Statistics for selected parameter:'

It provides a drop-down menu with the option 'Helpdesk users' and all defined ticket type categories :

- when picking the 'Helpdesk user', a number-of-ticket table sorted horizontally by ticket types (and inside each, by status) and vertically by the issuing users (belonging to the user group as chosen on the top of the page) (Fig.8.14) ;
- when picking a category, a number-of-ticket table sorted horizontally by ticket types (and inside each, by status).

### 8.5.2.3 'Global Statistics - sort by parameters:'

It displays all possible tables described above ('Helpdesk users' and each possible category).

HELPDESK [Customer Support Group] - Activities

Activities by User : James on  Monday 02 January 2012 

Statistics for James - 02/01/2012

9h30	9h45	<p><a href="#">NewTicket (Smith.John)</a></p> <p><a href="#">Ticket (Smith.John)</a></p> <p>Action :  <b>[Notification by email :                      Dear Sir/Madam,                      Your request is currently being processed.                      We thank you for your patience.                      Kind Regards]</b></p> <p>Duration : 0 min.</p>
9h45	10h0	<p><a href="#">Ticket (Smith.John)</a></p> <p>Action : <b>Smith's complaint : Cheddar Cracker box (s/n Box 242) contained a 'dead bug'.                      Supplier : Food Corps, Ltd.</b></p> <p>Duration : 0 min.</p> <p>Action : <b>Open</b></p> <p>Duration : 0 min.</p> <p>Action : <b>ticket assigned to [External Relations] Mary</b></p> <p>Duration : 0 min.</p>
14h0	14h15	<p><a href="#">Ticket (Smith.John)</a></p> <p>Action : <b>If another problem like this happens again                      --&gt; change supplier</b></p> <p><b>[Notification by email :                      Dear Sir,                      We're glad to give you a full refund of your products, exclusive vouchers in our shops and a                      free tour in Food Corps with gifts. We are waiting for you at your usual shop. Yours                      Faithfully, James (Manager)]</b></p> <p>Duration : 0 min.</p> <p>Action : <b>Closed</b></p> <p>Duration : 0 min.</p>

Figure 8.11: A log of James' activity on the day when the example client complaint was issued.



**HELPDESK [Administrator] - Statistics**

From :  Monday 06 December 2010 to :  Sunday 12 December 2010


User group :  ▾

Global statistics :

Statistics for selected parameter :  ▾

Global statistics - sort by parameters

Figure 8.12: From here, ticket statistics can displayed according to date and user groups, with three kinds of tables

Global Statistics :  

	Total	Closed	New	Open	Customer Pending	Event Pending
Nb of Tickets - Customer	3	1	2	0	0	0
Nb of Tickets - Supplier	0	0	0	0	0	0

Figure 8.13: The Global Statistics table.

Statistics for selected parameter :  ▾  :

Users	Total	Customer						Supplier					
		Total	Closed	New	Open	Client pending	Event pending	Total	Closed	New	Open	Client pending	Event pending
James	7	7	4	3	0	0	0	0	0	0	0	0	0
Karen	1	1	1	0	0	0	0	0	0	0	0	0	0
<b>TOTAL</b>	<b>8</b>	<b>8</b>	<b>5</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Figure 8.14: This table sorts tickets by ticket types and issuing user.

Statistics for selected parameter :  ▾  :

Complaint	Total	Customer						Supplier					
		Total	Closed	New	Open	Client pending	Event pending	Total	Closed	New	Open	Client pending	Event pending
<b>TOTAL</b>	<b>72</b>	<b>70</b>	<b>15</b>	<b>0</b>	<b>54</b>	<b>1</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>

Figure 8.15: This table takes interest into a particular category.