

Full Ticket Forwarding

2017-07-05 - Colin Dunn - 1 Comment - in Product

Deskpro as a helpdesk removes the need to mess around with confusing shared email inboxes, or endless email chains, and consolidate your support and contact with your users in a controlled interface.

NOTE: This is a BETA feature, which can be enabled in **one-click** from your administrator dashboard!

Why would you need this?

We understand there are situations where a ticket may need to branch back into an email, when working with third parties, or departments which do not use the helpdesk system. We have listened to feedback from our clients, and implemented a feature to seamlessly forward out an entire ticket, or a historical email chain from a ticket.

How does this work?

You can now either forward the entire history using the tab next to the reply/note selection, or select the **“Forward ticket from here”** in any response, which will forward the ticket history from the response to the beginning of the ticket, and omit the most recent responses.

REPLY NOTE **FORWARD**

To: finance@example.com **Add:** To | CC | CC Sender | BCC
CC: accountant@example.com
BCC: thirdparty@example.com

From: John Doe <testing@deskpro.com>
John Doe <testing@deskpro.com>

Subject: John Doe <dev@deskprodev.com>
Fw: Magnam cum et et consequatur laudantium.

Attach Snippets B I U [Icons]

Hello,

We have been in contact with a client who is querying a few payments, claiming these have been taken twice. Below is the full history of our correspondence with the client, could the finance team verify the purchase orders, and the accountant ensure there was no double charging?

Let us know where we are with this!

Best Regards
John

----- Forwarded Message -----
From: John Doe <testing@deskpro.com>
Date: Sunday, January 18th 1970, 8:27:39 am
Subject: Magnam cum et et consequatur laudantium.

Hello,

Thanks for your query about this payment, I will get in touch with our finance department to check the status of these payments.

Thanks
John

From: Mikayla Reichert <goodwin.adrain@example.net>
Date: Sunday, January 18th 1970, 7:20:00 am
Subject: Magnam cum et et consequatur laudantium.

The Pool of Tears 'Curiouser and curiouser!' cried Alice in a few minutes she heard something splashing about in the flurry of the earth. At last.

Duchess: 'what a clear way you have of putting things!' 'It's a pun!'.

From: Beth Gerlach <rhett.schuster@example.net>
Date: Sunday, January 18th 1970, 7:19:56 am
Subject: Magnam cum et et consequatur laudantium.

In this example, I have forwarded the entire ticket history to the finance team, accountant, and have blind carbon copied (BCC) in a third party.

I see a full preview of the email to be sent. You may notice that **internal notes are omitted** from the forwarded email, the purpose of this is to forward correspondence history, so only user/agent replies are included.

The agent is also able to **select the email** this comes from, it can be their personal email in the helpdesk, or the helpdesk/departments email address, this is good for determining where you want responses to go, back into the helpdesk, or into the agents personal mailbox.

The email which is then produced is very similar to a forward chain in traditional email, so the recipients can look through the responses in a format that is familiar to them, and respond back without having to log in or use Deskpro!

Administrator settings

With this new feature there are some administrator settings to control how agents can forward out emails, and from which email addresses:

Ticket Forwarding — Outbound

These settings control how individual ticket messages are forwarded out of the helpdesk using the "Forward Message" function from the Agent Interface. This feature is available from the gear menu on each message in a ticket.

Ticket Account
Account used by the ticket

Choose the email account to use when an agent forwards a ticket message out of the helpdesk.

Allow agents to send from their own email address
When enabled, the agent will have a choice of sending "From" their own email address. For example, you could set the "From" address to `testing@deskpro.com` instead of the email account selected above. This would allow the recipients to reply back to you directly (i.e. thereby moving the conversation out of the helpdesk).

Important: To use this feature, the outgoing email account you selected above must be able to send from arbitrary email addresses. This usually requires special configuration on the email server to allow arbitrary "From" lines.

This is controlled from within the Admin Interface > Tickets > Forward Settings - Under "Ticket Forwarding - Outbound" - you can specify the default email address, and enable a setting where agents can use their own email addresses

Important Information

This will initially be released as a **BETA feature**, to enable this you will need to visit your Admin Interface > Admin Dashboard - on the bottom left of the page there will be a list of features to enable. You can enable **"Improved Forwarding"** to make use of this feature.

Comments (1)

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Keith Ritter

2 years ago

Love this feature! Nice work.