

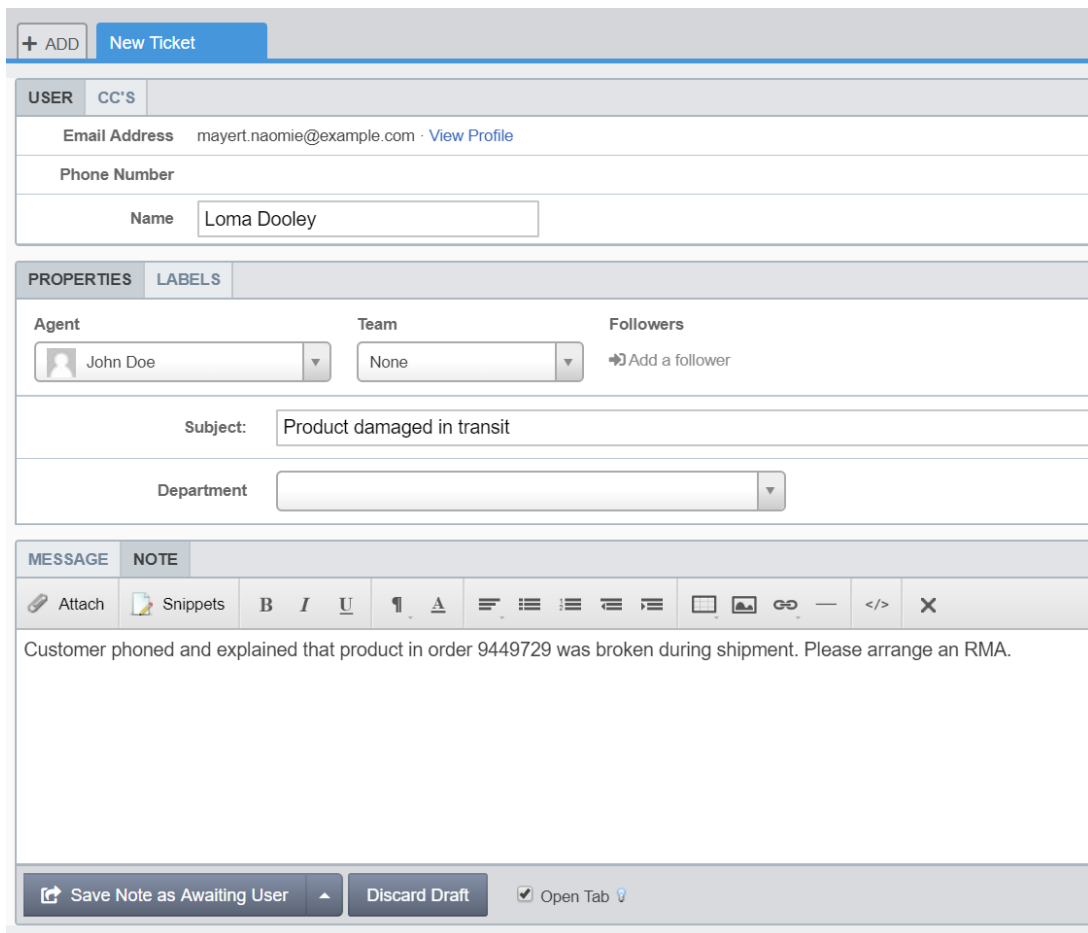
New Feature: Start a Ticket with an Agent Note

2015-06-25 - Ben Henley - Comment (1) - Product

Sometimes when you're creating a ticket on behalf of a user, based on a phone call or live chat or a watercooler conversation, you don't want to send them a message telling them that you know what they just told you. You just want to write down the problem and assign it to the best agent or team to fix it, and then message the user when you actually have something new to say.

We've now updated DeskPRO with the option to **create a ticket and start with an internal agent note**, instead of a message to the user.

You'll soon see a new **TICKET NOTE** tab when you're making a new ticket:



The screenshot shows the 'New Ticket' form in DeskPRO. At the top, there is a '+ ADD' button and a 'New Ticket' button. Below this is a 'USER' section with a 'CC'S' tab. The 'Email Address' field contains 'mayert.naomie@example.com' with a 'View Profile' link. The 'Phone Number' field is empty. The 'Name' field contains 'Loma Dooley'. Below the 'USER' section is a 'PROPERTIES' section with a 'LABELS' tab. The 'Agent' field is set to 'John Doe', the 'Team' field is set to 'None', and there is an 'Add a follower' button. The 'Subject' field contains 'Product damaged in transit' and the 'Department' field is empty. Below the 'PROPERTIES' section is a 'MESSAGE' section with a 'NOTE' tab. The 'NOTE' tab is active, and the message content is 'Customer phoned and explained that product in order 9449729 was broken during shipment. Please arrange an RMA.' At the bottom of the form, there are three buttons: 'Save Note as Awaiting User', 'Discard Draft', and 'Open Tab'.

You'll notice that the default when you start with a note is to make the new ticket Awaiting User - so you may need to edit the status, depending on the context of the ticket.

Of course, you can switch back to the ticket message tab if you realise you do want to send a message after all.

We're going to be rolling this out to your Cloud helpdesk soon. (DeskPRO On-Premise admins: you can update your helpdesk to version #407 or greater to get this right now).