Tickets

- Capture the Account name, Contact Name and Product Name for the ticket.
- Capture the mode of ticket creation in the source field.
- During creation, the ticket can be closed instantly by selecting "Point Of Call" value to yes.
- Store crisp description of the ticket in subject field.
- The ticket can be any one of the status – Open, Pending, Closed.
- Ticket cannot be created in pending or closed status.
- Select sub-status value based on the status values.
- Select sub-category value based on the category value.
- Mention the priority and severity of the ticket.

Quick Ticket

- Create Ticket quickly with minimum description.
- Status is Open by default.
- Capture account name, subject and diary entry details.

Quick Search

- Ticket can be searched quickly by entering the ticket number.
- Ticket details could be viewed if any exact match is found and list of tickets would be displayed if any similar match were found.

Marking Parent-Child Tickets

- Mark a Ticket as a child to another Ticket by selecting a parent Ticket for the current Ticket.
- A parent Ticket cannot be a child to another Ticket.
- The system closes the entire child Tickets, when the parent gets closed.

Diary Entry

- Stores a brief description of the Ticket.
- Diary entry is mandatory field during edition also.
- The text in the diary entry field can be aligned, altered in font styles, coloring, etc.
- Spell checking can be done on the text in Diary Entry field.

Attachments

- Add or remove attachments for each Ticket.
- The administrator configures the size and the number of the attachment.

- The maximum file size that can be attached to a Ticket is 1 MB.
- The maximum number of attachments that can be added to a Ticket is 10.

Knowledge Base

- Add or remove Ticket from the knowledgebase list.
- Addition of comments to Ticket in the knowledgebase list.
- Search templates with pre-defined search values are available for easy search.
- The administrator configures enabling or disabling of confirmation for adding the Ticket to Knowledgebase.
- The administrator configures enabling or disabling of confirmation for removing the Ticket from Knowledgebase.

Ticket Templates

- The template holds a pre-defined set of values that fills the fields if selected during ticket creation.
- Captures information like name, status, subject, category, sub-category, severity, priority, Ticket status, sub-status and group.
- Add a new template or search a one.
- Update or delete an existing template.

Ticket Allocation

- Ticket can be allocated manually or by auto assigning (the system decides the assignee.)
- On allocation of Ticket, mention the assigned date.
- Manual Assigning of Ticket
  - Ticket holder allots the Ticket to specific group manually.
  - Ticket holder allots the Ticket to a user in a specified group manually.
- Auto Assigning of Ticket
  - The administrator configures auto-assigning fields.
  - Auto assigning shall be based on the average resolution time or average Ticket count of the selected users.
  - Auto assigning shall be based on the logged in users or all users.
  - Auto assigning based on User Skill set mappings
  - Option to enable or disable Auto Assigning
  - Option to enable or disable Auto Assigning to Users who are not logged in to the System.

Skill Set

- Define the set of skills possessed by an individual (user) to solve the submitted Ticket.
- The administrator configures the skill set values for the users.
- Activate or inactivate the configuration for a specific field's value at any time.
- Users matching the configured in the auto assigning fields are filtered for auto assigning.

Resolution Time

- The administrator configures enabling or disabling manual entering of resolution date during Ticket creation.
- The administrator configures enabling or disabling auto service level agreement calculation.
- The timestamp for resolving the ticket can be set during ticket creation in manual method.
- Manual setting of resolution time cannot be done for a Ticket in pending status.
- In Automatic way of setting the resolution time, the system provides the ticket with a timestamp based on the service level agreements configured by the administrator.

Service Level Agreements (SLA)

- SLA identified by unique Name given by the administrator.
- There can be active or inactive SLA's.
- SLA can be resolved based on Operational Hours and Holidays configuration done by the administrator.
- The administrator provides the time for resolution and response in terms of hours and minutes.
- Add a new SLA or search a one.
- Update or delete an existing SLA.
- Incase of multiple SLA's satisfying, the system helps to select a SLA with least sort number organized by the administrator.

Rules

- The administrator shall define one or more rules for a SLA.
- The rule has a criteria and value that has to be matched for the SLA to be applied on the created ticket. The criteria can have user-defined fields also.
- The administrator shall choose either AND or OR match while defining the rule.
- The rule can be added or removed by the administrator.

- One or more values for the same field can be configured. In that case it checks for the OR match of the specific field.

Escalation

- SLA has escalations. That is when activity related to ticket management gets delayed; the system sends an email to the pre-configured recipient(s)
- The administrator shall configure the levels of escalation for each SLA.
- SLA allows the administrator to configure up to 10 levels of escalation.
- At each level of escalation the administrator shall select whether to escalate before or after the violation.
- The administrator shall enter the time for escalation notification in terms of hours and minutes at each level of escalation.

Holiday

- Mark a day as holiday or unmark it.
- Update or delete a marked day.
- Days marked, as holiday can be made active or inactive.
- Recursive option is available to mark all the days of the selected date's day in the year as holiday.

Business Hour

- The administrator configures the organizations working hours.
- The system calculates resolution time for tickets based on this timing.

Ticket Editing

- All the fields in the ticket screen can be edited. Diary Entry is a mandatory field always.
- History of Diary Entry field details is displayed.
- Attachments can be removed or added.

Viewing of Ticket Details

- View of the ticket details is possible.
- View the history of diary entry details.
- View the attachment details.

Audit Trail

- Display the audit Trail (History) details of Ticket fields configured by the administrator.

- The Ticket fields configurable are status, sub-status, priority, severity, issue category, issue sub-category and assigned to.

Listing of Tickets

- The Ticket listing can be selected from multiple views like “My Open Tickets”, “My Open Pending Tickets”, “My Group/Team Tickets”, “All Open Tickets”, “All Unassigned Tickets”.
- The Ticket rows get highlighted with different colors based on the configuration set by the administrator.
- Flag gets hooked to the Ticket based on the field configured by the administrator.

Configuring Grid Fields

- The user can configure the fields in the list of Tickets.
- Only the fields selected by the user get displayed for her/him.
- The fields in the grid can be sorted.
- The user can also configure the sequence arrangement of fields.

Bulk Ticket Updating

- Bulk of Tickets field values can be updated at once using the Mass Update option.
- Priority, severity, status, status based sub-status, category, category based sub-category, group,
- Group based assigned to and diary entry field could be updated.
- Updating of status without sub-status, category without sub-category, group without – assigned to is not possible.

Ticket Status Update

- Bulk of tickets can be made active or inactive.
- Tickets can be selected using various search fields available.

Searching of Ticket

- Templates can be created or deleted during search.
- Templates store pre-defined values. It can be used for search.
- Search can be based on the values of the following fields: Ticket number, Group, Subject, Account name, Account grade, Account type, Account address, Contact name, Contact phone, Status, Sub-Status, Priority, Severity, Category, Sub-Category, Product name, Product category, Product make, Product model, Assigned to user, Created by user, Modified by user, Created from date, Created to date, Modified from date, Modified to date, Resolution from date, Resolution to

date, Response from date, Response to date, Is Ticket Assigned, Is SLA Met, Is SLA in Progress and Is SLA Missed.

- Search result can be exported to word or excel format.
- Search result can be printed.

Field Layout Setting

- Create new user-defined fields or edit the existing fields in the Ticket page.
- Fields in create and view screen can be edited.
- All the mandatory fields are non-customizable.
- Sequence arrangement of all fields can be configured.
- Visibility of user-defined and customizable fields can be configured.
- User-defined and customizable fields can be configured as mandatory/non-mandatory.
- The Ticket creates and view screens can be resettled. (The fields moved to their original setting and user-defined fields get deleted.)

Ticket Number Pattern

- System allows configuring ticket number pattern.
- The system generates ticket number based on the configured pattern.
- The following attributes can be added in ticket number pattern: Hour, Minutes, Seconds, Last 2 digit of year, Year, Month, Day, 5 digit running Number, 10 digit running Number, Concatenation string, Hard coded string given between tags, first 3 character of category, First 3 character of user, First 3 character of group.
- Reset option is available based on the year, month or date field change.

Business Rule

- Ticket field values can be updated based on the rules specified by the user.
- Business rule identified by unique Name given by the administrator.
- Business rule allows the administrator to provide brief description about the business rule.
- The administrator can create active or inactive business rule.
- Incase of multiple business rules satisfying, the system helps to select a business rule with least sort number organized by the administrator.
- Add a new business rule or search a one.
- Update or delete an existing business rule.

Rules

- The administrator shall define one or more rules for a business rule.

- The rule has a criteria and value that has to be matched for the business rule to be applied.
- The administrator shall choose either AND or OR match while defining the rule.
- The rule can be added or removed by the administrator.
- One or more values for the same field can be configured. In that case it checks for the OR match of the specific field.

Actions

- The administrator shall define one or more actions for a business rule.
- The action has a criteria and value that has to be matched for the business rule to be applied.
- The rule can be added or removed by the administrator.

Email Notification

- Configure the administrator setting to enable the mailing feature of the system by entering the SMTP server name or the IP Address of the server name.
- Configure the administrator setting to enter the From Email ID for auto escalation mails.
- Configure the administrator setting to enable or disable all outgoing emails.
- Configure the administrator setting to enable or disable the mailing feature in the system.
- Add a new email template or search a one.
- Update or delete an existing email template.

Email Templates

- The administrator can create an email template with the list of available variables (Ticket fields)
- The administrator configures the sender and recipients of the email.
- The administrator configures the subject of the email.
- The template can be active or inactive.
- The system triggers the mail, when the configured event occurs.
- One or more Mail templates could be defined for the same event.
- A mail with the pre-defined active template form is send to the user on the commencement of the event specified.
- The events can be on Ticket creation, Ticket closing, Ticket going to pending status, Ticket going out of pending status, Parent Ticket creation, Parent Ticket closing, Ticket assigning or User creation.

- The content for the mail can be entered text and copy the variables from the dynamic text template list, which will be replaced with the original data's at runtime for the generated mail.

Category

- Any number of issue categories can be created for Tickets.
- Capture information like name, acronym, status, etc.
- Add a new category or search a one.
- Update or delete an existing category.

Sub-Category

- Any number of issue sub-categories can be created for Tickets.
- Sub-Category can be created based on the category value.
- Captures information like name, category, status, etc.
- Add a new sun-category or search a one.
- Update or delete an existing sub-category.

Sub-Status

- Any number of sub-statuses can be created for Ticket status values (Open, Pending, Closed).
- Capture information like name, Ticket status, status.
- Add a new sub-status or search a one.
- Update or delete an existing sub-status.

Groups

- Capture information like name, acronym, status, etc.
- Add a new group or search a one.
- Update or delete an existing group.

Other Ticket features

- Copy the Ticket details and creates a new Ticket with the existing details.
- Mailing of Ticket details to multiple users.
- Printing of Ticket details.
- Ticket could be sent back to its owner (one who created the Ticket).
- Ticket could be sent back to the sender (one who assigned the Ticket).
- Add a new Ticket or search a one.
- Update or view the Ticket details.

Contacts

- Capture basic information of a contact like first name, last name, account name, status, email id, mobile and phone numbers, etc.
- Update an existing contact or insert a new one.
- Viewing a contact detail.
- Search result shall be exported to word or excel format.

Field Layout Setting

- Create new user-defined fields or edit the existing fields in the Contact page.
- Fields in create and view screen can be edited.
- All the mandatory fields are non-customizable.
- Sequence arrangement of all fields can be configured.
- Visibility of user-defined and customizable fields can be configured.
- User-defined and customizable fields can be configured as mandatory/non-mandatory.
- The Contact creates and view screens can be resettled. (The fields moved to their original setting and user-defined fields get deleted.)

Configuring Grid Fields

- The user can configure the fields in the list of Contacts.
- Only the fields selected by the user get displayed for her/him.
- The fields in the grid can be sorted.
- The user can also configure the sequence arrangement of fields.

Import Data

- Bulk of data's from outside can be imported.
- Template is available with the required fields.
- Download the template and fill the required details and upload the excel file to import the bulk of data's.
- Indication will be provided with the number of data's uploaded successfully and number of uploads failed.

Accounts

- Capture basic information of a account like name, display name, status, email ID, parent name, phone, mobile, address, city, state, country, pin code, time zone, grade, type, login ID, login status, password, confirm password, etc.
- Update an existing account or insert a new one.
- Viewing an account detail.
- Search result shall be exported to word or excel format.

Field Layout Setting

- Create new user-defined fields or edit the existing fields in the Account page.
- Fields in create and view screen can be edited.
- All the mandatory fields are non-customizable.
- Sequence arrangement of all fields can be configured.
- Visibility of user-defined and customizable fields can be configured.
- User-defined and customizable fields can be configured as mandatory/non-mandatory.
- The Contact creates and view screens can be resettled. (The fields moved to their original setting and user-defined fields get deleted.)

Configuring Grid Fields

- The user can configure the fields in the list of Accounts.
- Only the fields selected by the user get displayed for her/him.
- The fields in the grid can be sorted.
- The user can also configure the sequence arrangement of fields.

Import Data

- Bulk of data's from outside can be imported.
- Template is available with the required fields.
- Download the template and fill the required details and upload the excel file to import the bulk of data's.
- Indication will be provided with the number of data's uploaded successfully and number of uploads failed.

Products

- Capture basic information of a product like name, category, make, model, price, status, etc.
- Add or remove services to a product.
- Capture information like name, description, status, etc.
- Add a new service or search a one.
- Update or delete an existing service.
- Update an existing product or insert a new one.
- Viewing a product detail.
- Search result shall be exported to word or excel format.

Purchase

- Capture the information of the purchase like date, product, account, serial number, price, description, etc.
- Update an existing purchase or insert a new one.
- Viewing a purchase detail.

Field Layout Setting

- Create new user-defined fields or edit the existing fields in the Product page.
- Fields in create and view screen can be edited.
- All the mandatory fields are non-customizable.
- Sequence arrangement of all fields can be configured.
- Visibility of user-defined and customizable fields can be configured.
- User-defined and customizable fields can be configured as mandatory/non-mandatory.
- The Contact creates and view screens can be resettled. (The fields moved to their original setting and user-defined fields get deleted.)

Configuring Grid Fields

- The user can configure the fields in the list of Products.
- Only the fields selected by the user get displayed for her/him.
- The fields in the grid can be sorted.
- The user can also configure the sequence arrangement of fields.

Import Data

- Bulk of data's from outside can be imported.
- Template is available with the required fields.

- Download the template and fill the required details and upload the excel file to import the bulk of data's.
- Indication will be provided with the number of data's uploaded successfully and number of uploads failed.

Reports

- Two types of reports are available. They can be pictorial or tabular.
- In pictorial representation they can be pie or bar chart.
  - The pie chart is a circular chart divided into sectors displaying the tickets count.
  - The bar chart is a rectangular stacked chart showing related data groups, one on the top of another.
- The user can drilldown with the link in the tabular format and navigate to the detailed list of selected set of results.
- View of enlarged size of report is possible.
- The report result can be exported to word format.

The reports available are:

- Ticket Status Report – Displays count of tickets under each status.
- Ticket Priority Report – Displays the count of tickets under each priority.
- Ticket Severity Report – Displays the count of tickets under each severity
- Point of Call Vs Non-Point of Call Report – Displays the count of tickets under point of call and non-point of call.
- SLA Report – Displays the count of tickets under "SLA Missed", "SLA Met" and "SLA In Progress"
- Top Tickets Report – Displays the count of tickets in category and sub-category.
- Log In Time Report – Displays the difference in time between the login and logout of the users.
- User Work Load Report – Displays the total number of assigned tickets for the selected User

Calendar

- Displays yearly, monthly, weekly and daily calendar.
- Task or reminder can be created from the calendar.
- List of tasks and reminders gets displayed.

Task

- Capture the information of the task like subject, description, start time, finish time, status, assigned to, etc.

- Update an existing task or insert a new one.
- Viewing a task detail.

Reminder

- Capture the information of the reminder like date, description, etc.
- Update an existing reminder or insert a new one.
- Viewing a reminder detail.

Dashboard

- A bar chart of top five priority/severity open tickets is displayed.
- A bar chart of top five group/category/sub-category open tickets is displayed.
- A pie chart of logged in and non-logged in users is displayed.
- A trend information chart of tickets for last 1 year based on Open/Pending/Closed status is displayed.

My Views

- Displays the list of logged in users announcement under “My Announcements”.
- Displays the Ticket count for the logged in user. Select from the list to display the Ticket count in Status, Sub-Status, Priority or Severity under “Scoreboard”.
- Displays the open tasks of the logged in user under “My Tasks”.
- Displays the active reminders of the logged in user under “My Reminders”.
- Displays the list of open tickets for the logged in user under “My Tickets”.

Roles

- Captures basic information like Name, Default Module, Description and Status.
- As per the selected default module the role assigned to the user will be redirected to that particular module.
- Enable or disable accessing of any module listed below.
- Add a new role or search a role.
- Update or delete an existing role.

For Home

- Dashboard

For Tickets

- Create Ticket
- Instant closure of Ticket
- For not a Ticket Owner, allow only adding "Diary Entry"
- Bulk Update Ticket
- Select a parent Ticket for a Ticket

- Return Ticket to Sender
- Return Ticket to Owner
- View Audit Trail Data
- Copy Ticket
- Print Ticket
- Email Ticket
- Export Ticket Data
- Add Attachment
- View Attachment
- Delete Attachment

For Assigning Tickets (Any one of the below)

- Allow assigning of Tickets to all users
- Allow assigning of Tickets only to logged in user
- Allow assigning of Tickets to logged in user and all users in his/her group
- Allow assigning of Tickets to logged in user and all users in his/her group or team
- Do not allow assigning of Tickets

For Viewing Tickets (Any one of the below)

- Allow viewing of Tickets to all users
- Allow viewing of Tickets only to logged in user
- Allow viewing of Tickets to logged in user and all users in his/her group
- Allow viewing of Tickets to logged in user and all users in his/her group or team
- Do not allow viewing of Tickets

For Editing Tickets (Any one of the below)

- Allow editing of Tickets to all users
- Allow editing of Tickets only to logged in user
- Allow editing of Tickets to logged in user and all users in his/her group
- Allow editing of Tickets to logged in user and all users in his/her group or team
- Do not allow editing of Tickets

For Closing Tickets (Any one of the below)

- Allow closing of Tickets to all users
- Allow closing of Tickets only to logged in user
- Allow closing of Tickets to logged in user and all users in his/her group
- Allow closing of Tickets to logged in user and all users in his/her group or team

- Do not allow closing of Tickets

Knowledgebase

- Add/Remove Ticket to/from Knowledge Base
- Add comments/remarks to Knowledge Base

Account / Contact

- View Account/Contact
- Create Account/Contact
- Modify Account/Contact
- Delete Account/Contact
- Import Accounts/Contacts data from Microsoft Excel
- View Tickets for the Account

Product / Purchases

- View Product/Purchase
- Create Product/Purchase
- Modify Product/Purchase
- Delete Product/Purchase
- Import Product Data from Microsoft Excel

Calendars

- View Calendar
- Add/Modify/Delete Tasks
- Add/Modify/Delete Reminders

Reports

- Print Reports
- Export Reports
- Zoom Reports
- Drill down Reports
- Ticket Reports
- SLA Reports
- Other Reports

Admin Modules

- Access all Admin modules
- Update my profile
- Manage Users of my Group only
- Manage my Skill Sets only
- Manage Category and Subcategory
- Manage Ticket Templates

Users

- Captures user information like first name, last name, employee number, email ID, display name, mobile, phone, login ID, password, confirm password, address, acronym, city, state, pin code, country, status, group, role, time zone, reports to, escalation level, is admin, date format, etc.
- User teams can be added.
- Role can be assigned to the user or we can give the user admin rights.
- Email will be sending when the SLA with the same level matches for the selected the mail escalation level for the users.
- Time zone can be selected while user creation, as per the selected time zone the date time will be displayed for the user.
- As per the date format selected the date will be displayed for the user. They can be
  - dd/MM/yyyy HH:mm
  - dd/MM/yyyy hh:mm tt
  - MM/dd/yyyy HH:mm
  - MM/dd/yyyy hh:mm tt
- Add a new user or search a user from the list.
- Update or delete an existing user.
- Bulk of users can be made active or inactive.
- After logging in the system will display user's "display name" with link in the header. It helps to update the user information at any time.

Dropdown Editor

- Create any number of dropdowns; add any number of values to a dropdown.
- New values can be added to the already existing dropdowns in the system.
- System allows editing the dropdown values in the existing system.
- Newly created dropdown can be included in to a module as user defined field.
- Add a new dropdown or search a one.
- Update or delete an existing dropdown's values.

Announcements

- Capture information like group name, description, start date, finish date etc.
- Add an announcement or search a one.
- Update or delete an existing announcement.

Settings

- Select a language that is used in the whole system.
- Enable or disable the system to log messages incase of any exceptions in the system.
- Enable or disable the system to log messages incase of any warnings in the system.
- Select the number of days for which the log details should remain in the system.
- Enable or disable the Help windows in the system.
- Enable or disable confirmation on deletion.
- Enable or disable confirmation on canceling.
- Enable or disable acknowledgement after saving.
- Enable or disable acknowledgement after deleting.

Terminology

- Changing the captions defined in the system is possible.
- Changing the alert messages defined in the system is possible.
- Changing the dropdown values defined in the system is possible.

Logo

- Upload the image file to be used as a logo by the system.
- Display own company logo on every page of the application.

Survey

- Create separate survey for each Account Grade.
- Capture basic information of a Survey like Name, Account Grade, Status, and Period From, Period To, Display Intro, Display Title and Display Footer.
- Add any number of questions to a survey.
- Add Single Choice, Multiple Choices or Text answers for each question.
- Set Survey Frequency for particular Account Grade in Tickets/ Days from Admin -> Settings Page.
- Automatic Email escalations with survey link during Ticket closure when survey frequency is met for the particular Account.
- Configure Survey Email Subject and Email body content using the Settings Page under Admin.

- Search a Survey from the list using Name, Account Grade, Status, Period From and Period To.
- Update/View existing Surveys.

Survey Report

- Generate reports based on Survey Name, Response Date From and Response Date To, etc.
- Report with fields like TicketNo, Date, and Assigned To, Account Name and Questions.
- Export Report to MS-Excel file.

Change Request

- Captures basic information like Application, Status, Raised By, Raised Date, Impact, Change Description, Schedule Start Date, and Schedule End Date.
- Change Request can be created in Open status.
- Mention the priority and severity of the Change Request.
- Change Request can be linked to a Ticket.
- Add Attachment to the Change Request.
- Email and Print a Change Request.
- Captures information like Approved By, Approved On, Approved Start Date, Approved End Date, Implementer, Impact Description, Implementation Detail, Change Justification, Dependency, Additional Remarks, and Changes after Implementation, Implementation Doc and Blackout Plan Document when the status changed to Approved.
- Captures information like Rejected By, Rejected on and Reason for Rejecting when the Status Changed to Rejected.
- Captures information like Closed By, Closed on and Post Implementation Review when the status changed to Closed.
- Update an existing Change Request or insert a new one.
- Viewing a Change Request detail.
- View the Open Request list separately.
- Search a Change Request using the Application, Raised By, Status, Raised by date from, Raised By Date To, Impact, Change Type, Priority and Severity
- Search results can be exported to Excel/ CSV.

Diary Entry

- Enter comment or remarks for a Change Request.
- Diary entry is mandatory during modifying a Change Request.

- The text in the diary entry field can be aligned, altered in font styles, coloring, etc.
- Spell checking can be done on the text in Diary Entry field.

General Features

Search Engine

- Each and every register contains separate search options.
- Searching is included not only for field wise and also dates wise searching.
- User Defined Fields added in the register will automatically add to the particular modules search page.
- We can also delete the entry from search mode. But an Admin can delete the closed entries.
- From the search mode itself we can move to edit mode and update the entry.

Dynamic Help

- Dynamic Help for all the modules in the form of balloon tool tip.
- Tool tip support multiple language.
- Can enable or disable Tool tip.