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Helpdesk Interface



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Auto-generated at June 2, 2025

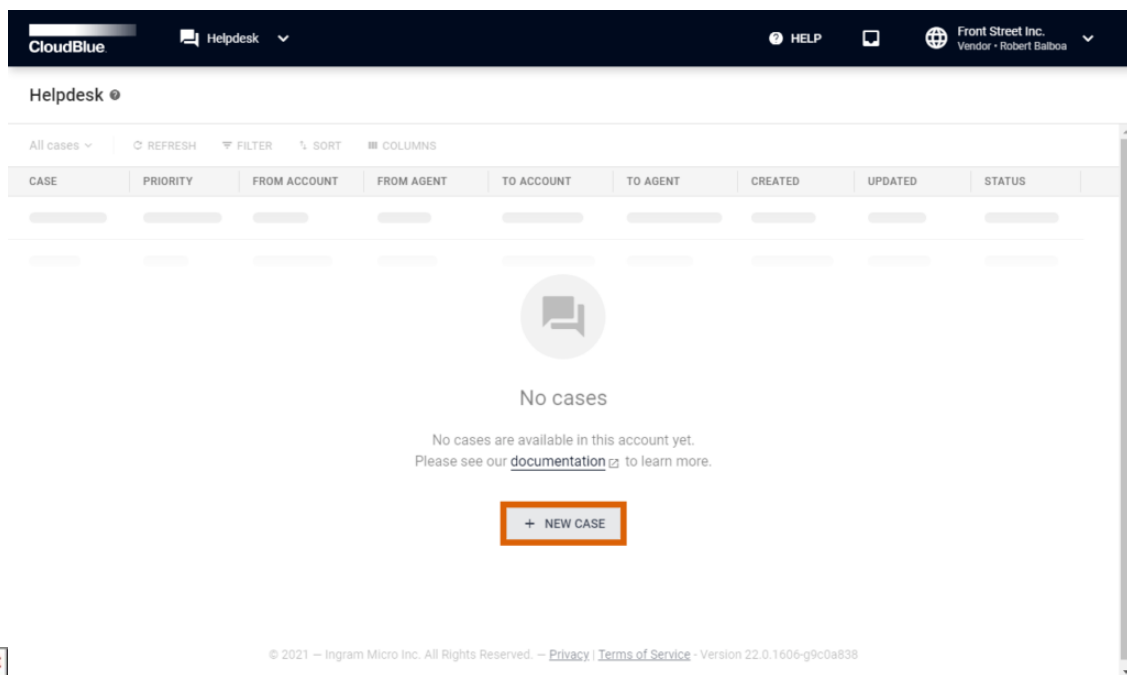


The following describes available operations within the Helpdesk module on the CloudBlue Connect platform, such as creating a Case, inquiring additional information, closing Cases, and more.

Creating Cases

Navigate to the **Helpdesk** module on the Connect platform. Submitted Cases are displayed within the provided list.

Click the **New Case** button to launch a case creation wizard.



Follow the wizard instructions to successfully create a new Case.

1. Select your Partner

Choose a Partner (Vendor, Provider, or Reseller) from the list.

The screenshot displays the CloudBlue Helpdesk interface. A modal window titled "New case — Step 1" is open, showing the "Partner" selection step. The sidebar on the left of the modal lists three steps: "1 Partner", "2 Details", and "3 Summary". The "Partner" step is currently selected. The main area of the modal shows a search bar and a list of partners. One partner, "Mighty Mick's LLC PA-995-631", is selected. At the bottom of the modal, there are three buttons: "CANCEL", "BACK", and "NEXT". The background of the interface shows a table of cases with columns for CASE, PRIORITY, FROM ACCOUNT, FROM AGENT, TO ACCOUNT, TO AGENT, CREATED, UPDATED, and STATUS. The top of the interface shows the CloudBlue logo and the Helpdesk menu.

Click the **Next** button to continue.

2. Specify Case details

Fill out the following details form:

- **Subject:** Enter your Case subject (Case name) in this field.
- **Priority:** Select priority from the list (Low, Medium, High, or Urgent).
- **Type:** Choose a *Business* or *Technical* issue type.
- **Description:** Enter your Case description in this field.
- **Product:** Specify a product for your case (optional).
- **Attachments:** Upload additional files, such as screenshots or logs (optional).
- **CC:** Add "carbon copy" recipients (optional).

CloudBlue Helpdesk

Front Street Inc. Vendor - Robert Balboa

Helpdesk

NEW CASE

Partner

Details

Summary

Subject *

Tutorial Case

Priority *

Medium

Type *

Technical

Description *

This is a tutorial Case

lines: 1 words: 5 23/10000

Product

Tutorial Product PRD-404-832-779

Attachments

CANCEL BACK CREATE

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Click **Create** to create your Case.

3. Review your summary

Once your case is successfully created, the system provides your case summary.

CloudBlue Helpdesk

Front Street Inc. Vendor - Robert Balboa

Helpdesk

NEW CASE

Partner

Details

Summary

Case

Tutorial Case CA-982-766-464 Pending

Partner

Mighty Mick's LLC PA-995-631

Priority

Medium

Type

Technical

Product

PRD-404-832-779

CC

Robert Balboa

GO TO DETAILS CLOSE

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Click **Go to Details** to access the Case details screen. Otherwise, click **Close** to close the summary.



Case details

Click on the Case name from the Helpdesks module to access the **Case details** screen.

The Case details screen indicates if an **Outgoing** or **Incoming** Case is opened. This information is displayed at the upper left corner of the screen.



Information

Outgoing Cases represent tickets submitted **from** your account. **Incoming** Cases represent issues submitted **to** your account.

Next, this screen contains specified details. Namely, it provides Case **Status**, selected **Priority**, specified **Type**, selected **Product**, and a reporter (the **From** field).

The Case details screen also displays assigned **Agents** and **CC** for Incoming or Outgoing Cases.



Advice

Change your assigned *Agent* or specified *CCs* by using the corresponding fields



under **People**.

The **Workflow** bar indicates the current state of your Case, associated users and dates. The Workflow bar also showcases completed states and the following states of this Case.

Furthermore, this screen allows uploading attachments and submitting comments for communication between Partners or private messaging. Follow the instructions below to upload an attachment and submit a comment.

Uploading Attachments

The **Attachments** field allows uploading additional files, such as screenshots, pictures, logs, and so on. Attachments can be especially helpful for technical issues. Follow the steps below to successfully upload your file

1. Click the **Upload Attachments** button to submit your file.

CloudBlue Helpdesk

HELP

Front Street Inc.
Vendor - Robert Balboa

Outgoing Case Details

Type Technical CC -

Product Tutorial Product

Description EDIT

This is a tutorial Case.

Attachments

UPLOAD ATTACHMENTS

Comments ADD COMMENT

ADD COMMENT

Created By Robert Balboa at 03/11/2021 3:39 AM

Inquiring

Pending Since 03/11/2021 3:39 AM

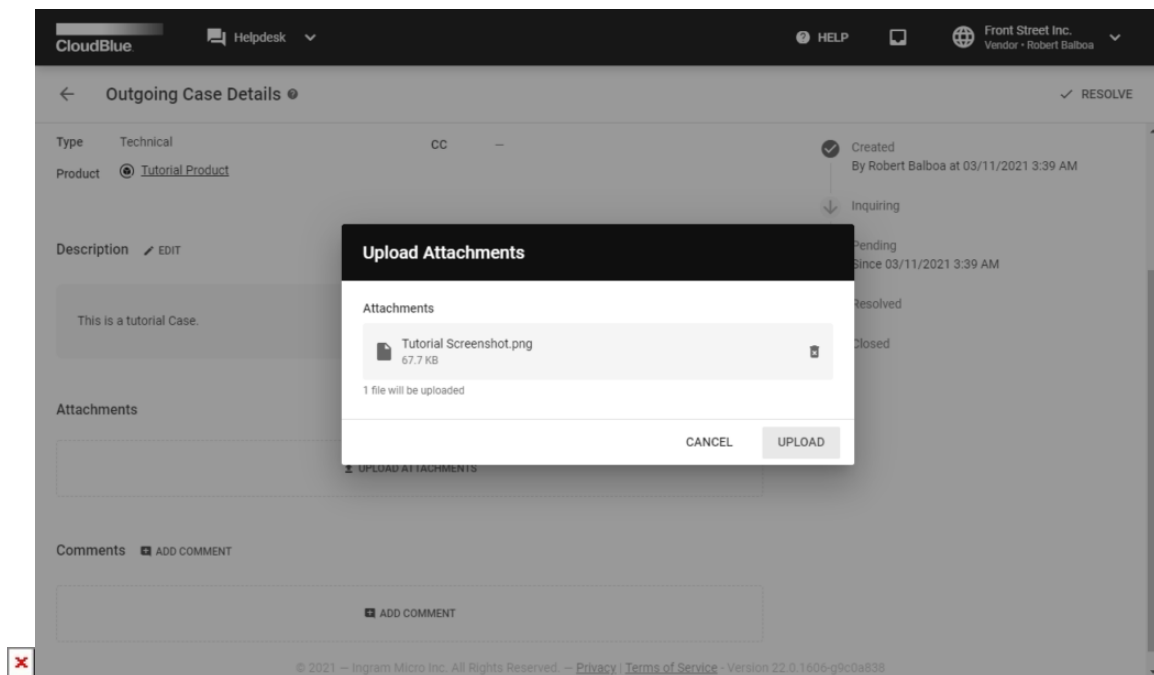
Resolved

Closed

RESOLVE

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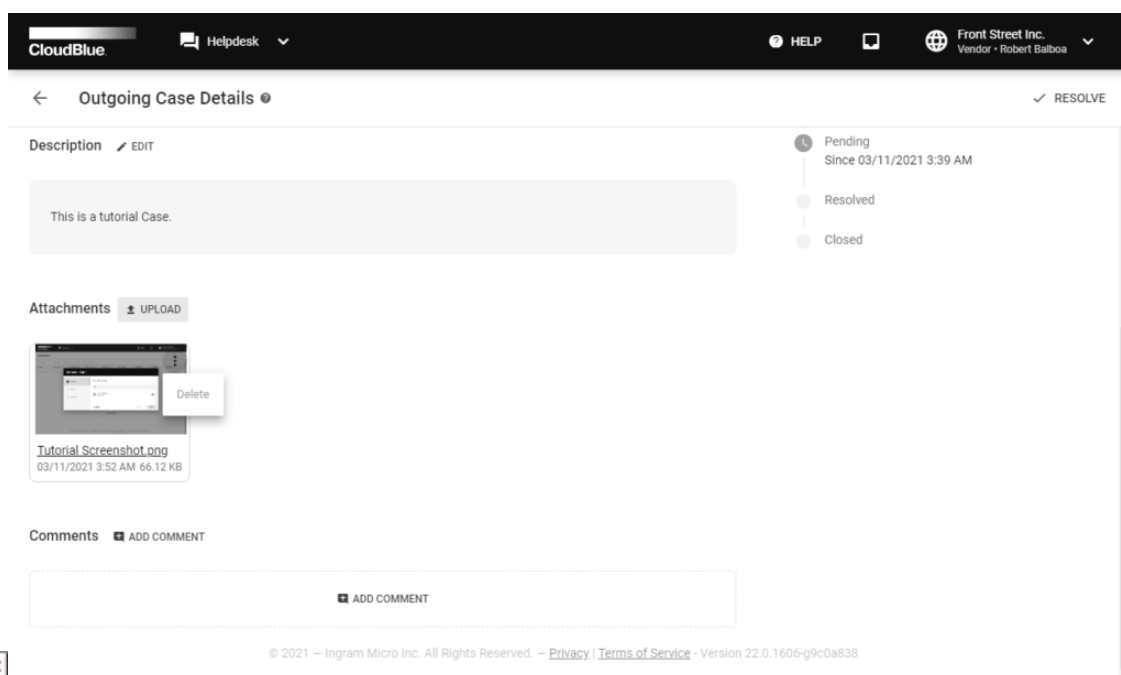
2. Drag or select your files to the corresponding zone in the following **Attachments** form.



Advice


Alternatively, click the **browse** button to locate and submit your file. Note that maximum upload file size is 10 megabytes.

3. Click the **Upload** button to upload your file. Once this operation is complete, your file will be displayed under **Attachments** within the Case details screen.





CloudBlue Helpdesk

Outgoing Case Details


Description  EDIT


This is a tutorial Case.

Attachments  UPLOAD

 Delete

Tutorial Screenshot.png
03/11/2021 3:52 AM 66.12 KB

Comments  ADD COMMENT

 ADD COMMENT

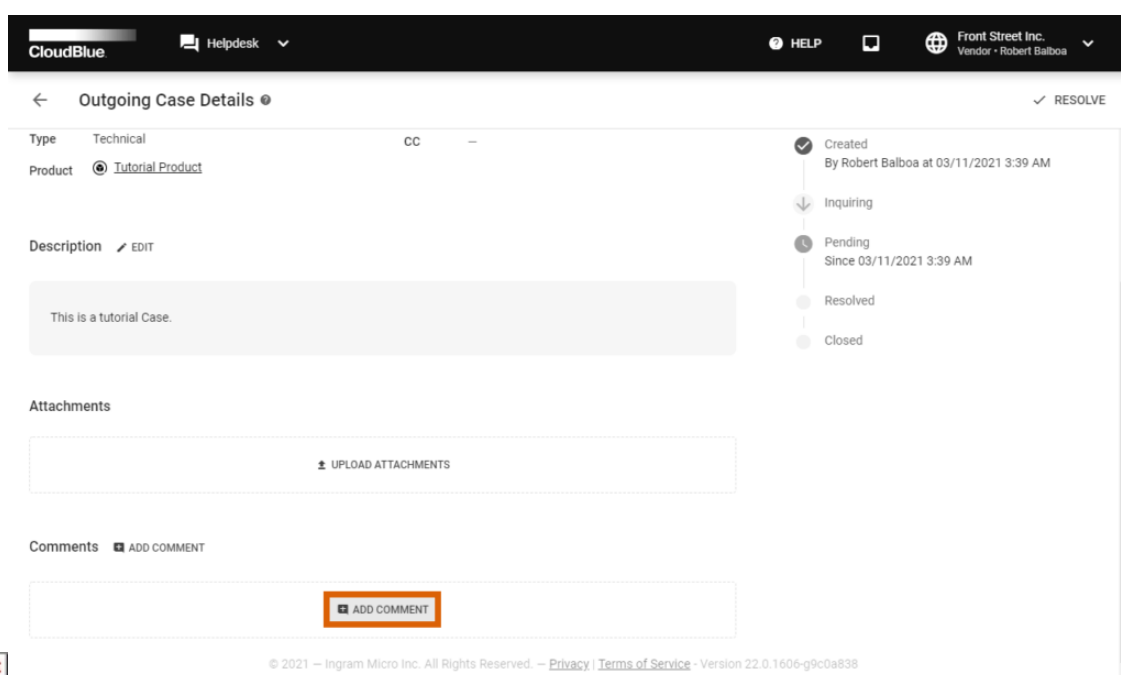
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Upload or delete your files by using the corresponding buttons on the user interface.

Adding Comments

The **Comments** field is used to submit messages for Partners or to leave a *Private* message for users of your account. This field also displays the system messages. Follow the steps below to add a comment.


1. Click the **Add Comment** button to add a new comment.




CloudBlue Helpdesk

Outgoing Case Details


Type Technical CC —


Product  Tutorial Product


Description  EDIT

This is a tutorial Case.

Attachments

 UPLOAD ATTACHMENTS

Comments  ADD COMMENT

 ADD COMMENT

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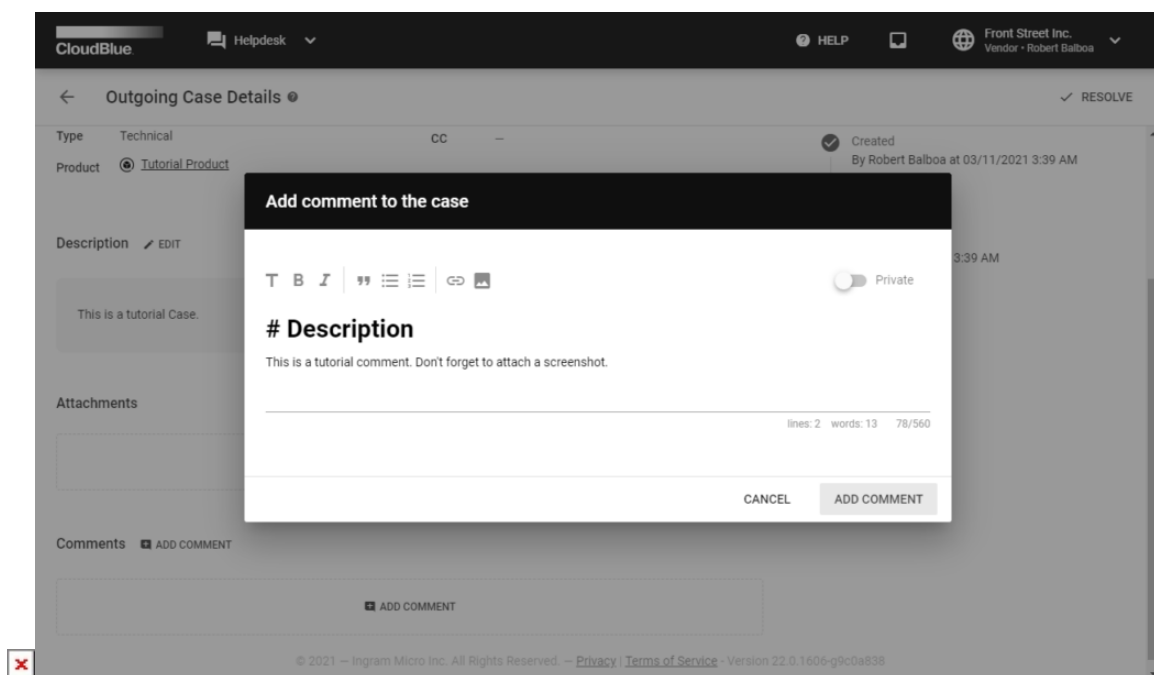


2. Enter your comment into the **Comments** form.

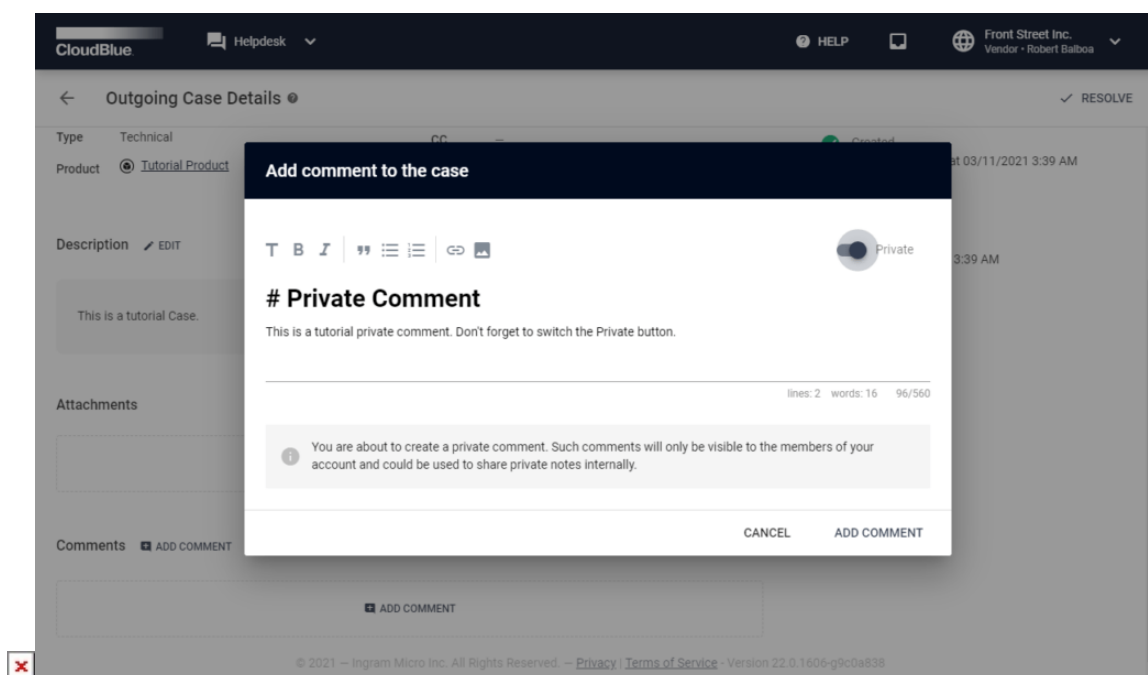


Advice

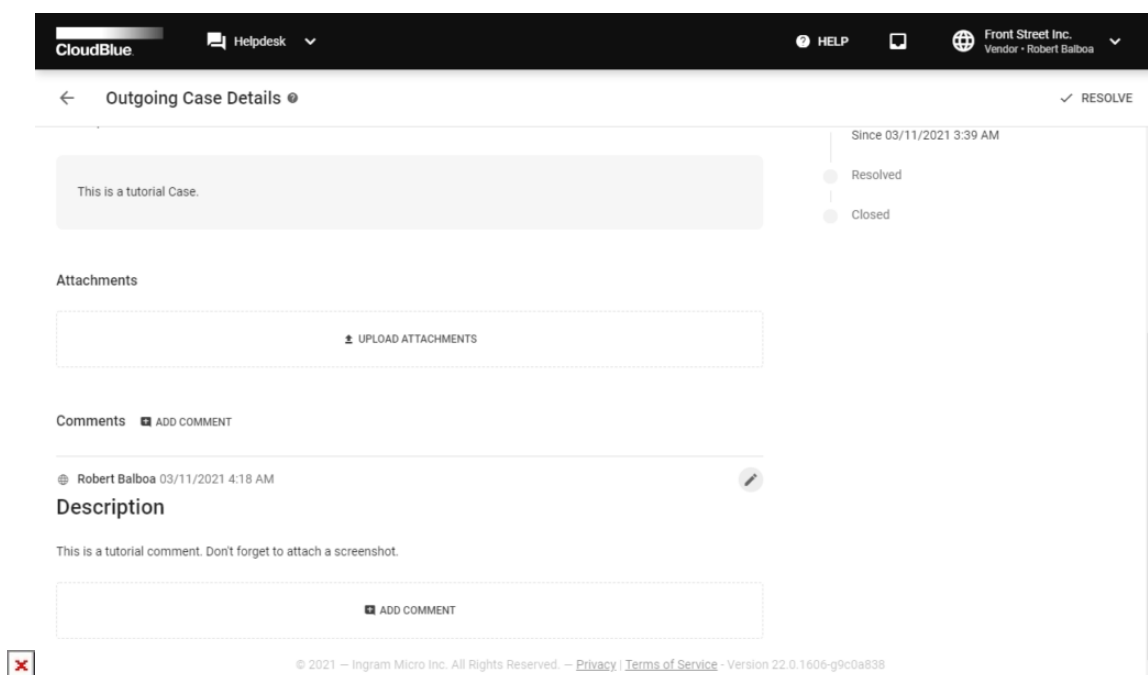
Use corresponding buttons on the user interface to edit your text (create headings, quotes, etc.), insert links, or attach images. Furthermore, it is recommended to submit a message with less than 560 symbols.



3. Click on the **Private** switch to make your comment visible only to users of your account.



4. Click **Add Comment** to successfully submit your comment. Therefore, your comment will be available from the Case details screen.



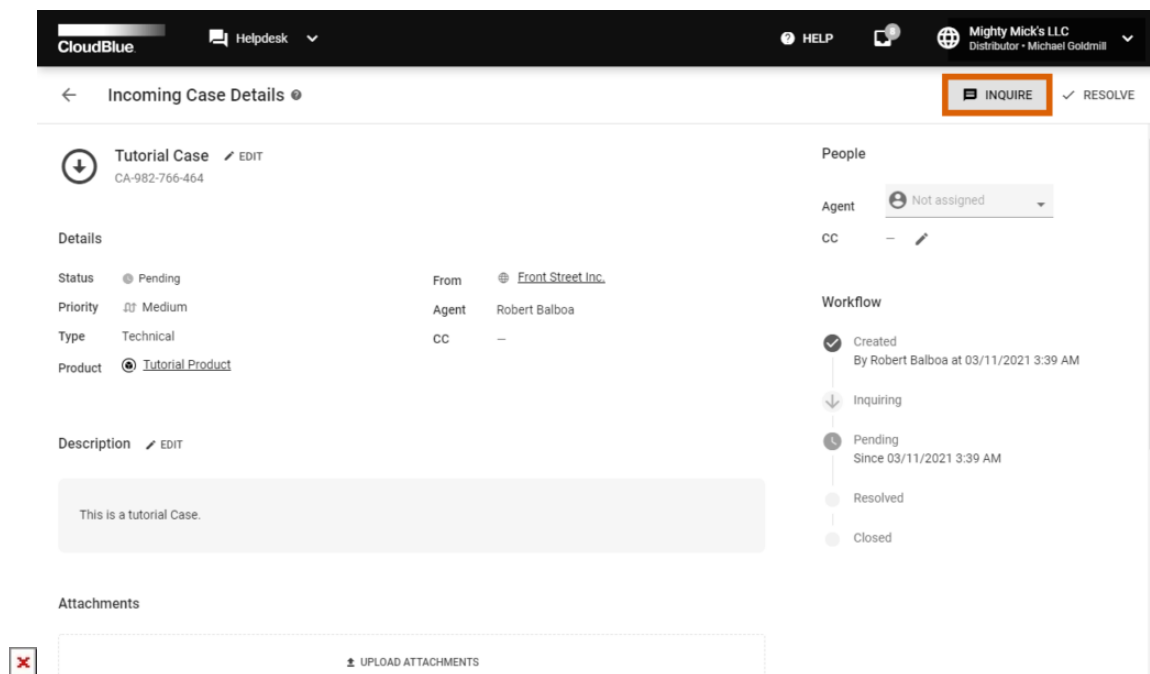
It is possible to edit your comments by clicking on the **Edit** icon next to your submitted comment.

Inquiring data

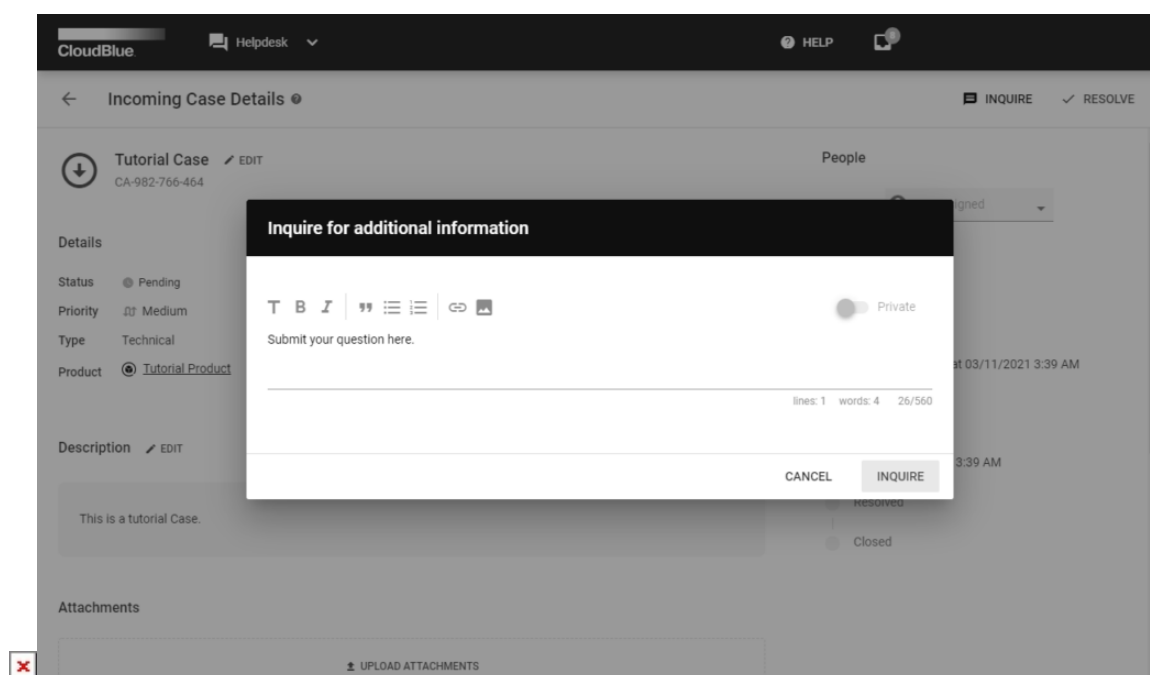
If more information is required for your **Incoming** Case, you can inquire additional information from the **Case details** screen.

The following steps showcase how to inquire more information and how to transfer your Case to the Inquiring state

1. Click the **Inquire** button to inquire information from your Partner.



2. Add a comment into the following Inquire form.



3. Click **Inquire** to submit your comment. Once your request is submitted, the system transfers the Case to the *Inquiring* state.



CloudBlue Helpdesk

HELP

Mighty Mick's LLC
Distributor - Michael Goldmill

← Incoming Case Details → SUBMIT DATA

Tutorial Case CA-982-766-464 EDIT

Details

Status **Inquiring**

Priority Medium

Type Technical

Product Tutorial Product

From Front Street Inc.

Agent Robert Balboa

CC

People

Agent Not assigned

CC

Workflow

Created By Robert Balboa at 03/11/2021 3:39 AM

Inquiring Since 03/11/2021 4:31 AM

Pending Since 03/11/2021 3:39 AM

Resolved

Closed

Description EDIT

This is a tutorial Case.

Attachments

UPLOAD ATTACHMENTS

Thus, your Partner will be requested to submit required data to the specified Case.

Submitting data

If your **Outgoing** or **Incoming** Case is assigned in the *Inquiring* state, it is required to submit corresponding data and subsequently update the case. Complete the following steps to successfully send all required information.

1. Click the **Submit Data** button from the Case details screen.

CloudBlue Helpdesk

HELP

Front Street Inc.
Vendor - Robert Balboa

← Outgoing Case Details → SUBMIT DATA

Tutorial Case CA-982-766-464 EDIT

Details

Status Inquiring

Priority Medium

Type Technical

Product Tutorial Product

To Mighty Mick's LLC

Agent

CC

People

Agent Robert Balboa

CC

Workflow

Created Robert Balboa

Inquiring Since 03/11/2021 4:31 AM

Pending Since 03/11/2021 3:39 AM

Resolved

Closed

Description EDIT

This is a tutorial Case.

Attachments

UPLOAD ATTACHMENTS

2. Provide required information into the following form.

The screenshot shows the 'Outgoing Case Details' page for a case titled 'Tutorial Case' (CA-982-766-464). A modal window titled 'Submit required data' is displayed in the center. The modal contains a text area with a character count (lines: 1, words: 5 / 37/560) and buttons for 'CANCEL' and 'SUBMIT DATA'. The background shows the case details, including status (Inquiring), priority (Medium), type (Technical), and product (Tutorial Product).

3. Click **Submit Data** to send required information. Once all required data is presented, the system transfers this Case to the *Pending* state.

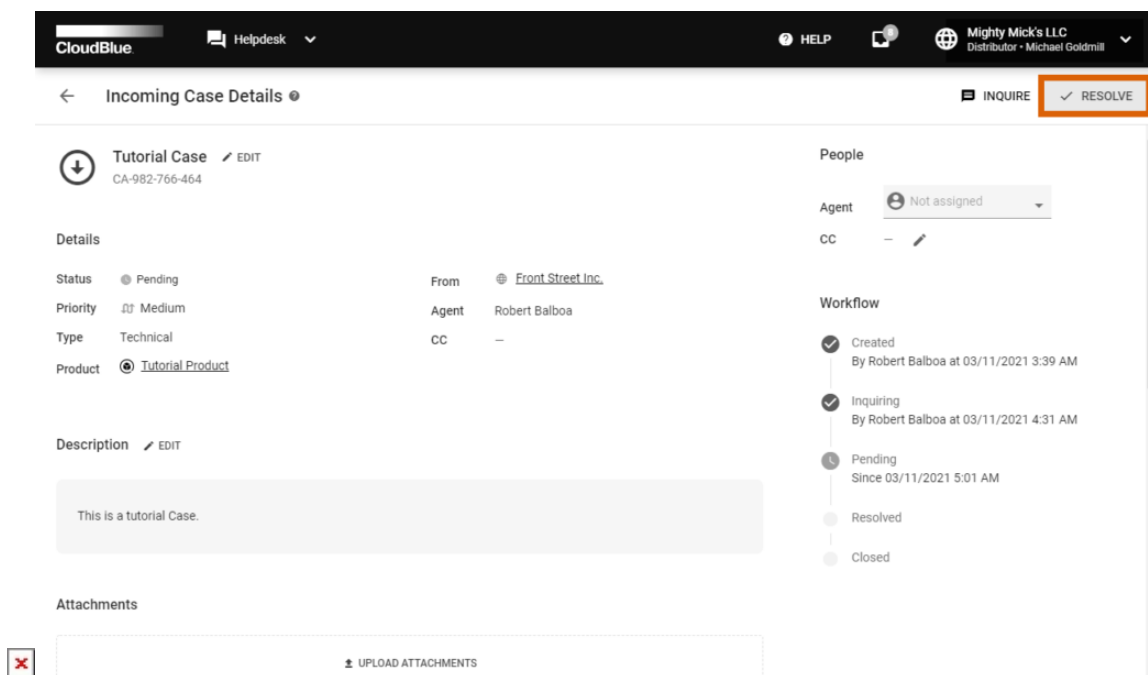
The screenshot shows the 'Outgoing Case Details' page for the same 'Tutorial Case'. The status is now 'Pending', which is highlighted with a red box. The 'Workflow' section on the right shows the case history, including 'Created', 'Inquiring', and 'Pending' states. The 'SUBMIT DATA' button from the previous step is now visible in the top right corner of the page.

Therefore, your required data will be submitted and the case will be successfully updated.

Resolving Cases

Once your problem or issue is solved, mark your Incoming or Outgoing Case as *Resolved* from the **Case details** screen. Follow the steps below to successfully resolve a Case.

1. Click the **Resolve** button from the Case details screen.

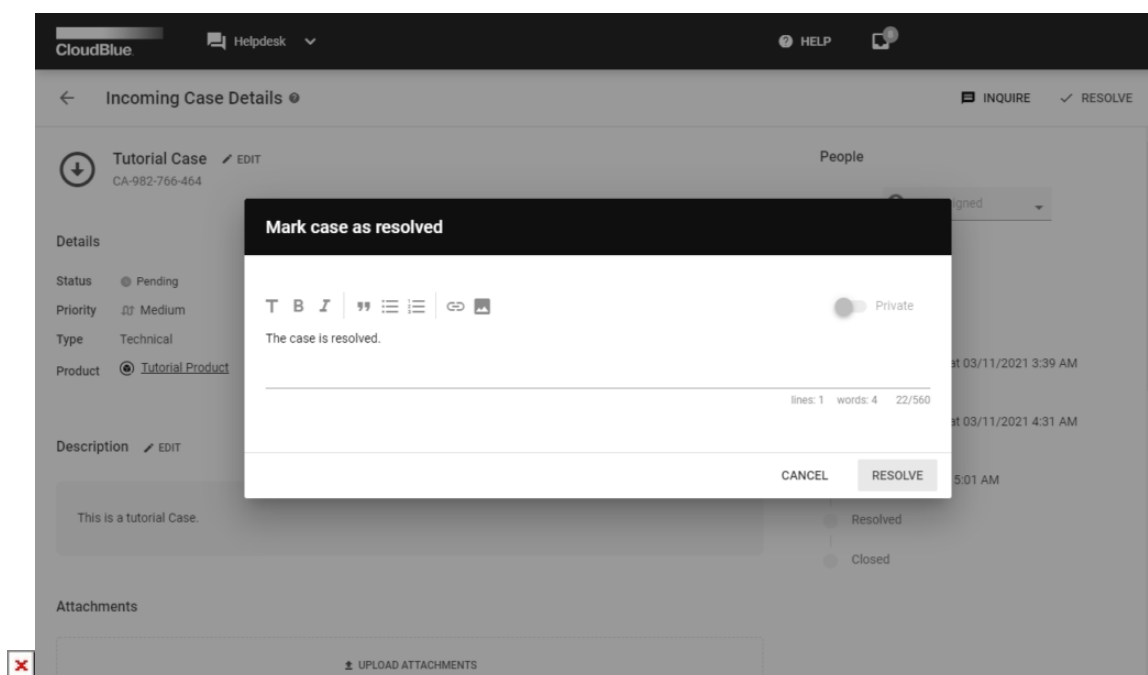


The screenshot shows the 'Incoming Case Details' screen for a 'Tutorial Case' (CA-982-766-464). The 'Resolve' button is highlighted with an orange box. The case details include:

- Status: Pending
- Priority: Medium
- Type: Technical
- Product: Tutorial Product
- From: Front Street Inc.
- Agent: Robert Balboa
- CC: -

The description field contains the text: 'This is a tutorial Case.' The workflow shows the case was created by Robert Balboa at 03/11/2021 3:39 AM, inquired by Robert Balboa at 03/11/2021 4:31 AM, and is currently pending since 03/11/2021 5:01 AM. The 'Attachments' section is empty.

2. Add a comment with required information into the following form.



The screenshot shows the 'Mark case as resolved' dialog box. The dialog box has a title bar 'Mark case as resolved' and a text area with the text 'The case is resolved.' The text area has a character count of 'lines: 1 words: 4 22/560'. The dialog box has 'CANCEL' and 'RESOLVE' buttons. The background shows the 'Incoming Case Details' screen for the 'Tutorial Case'.



3. Click **Resolve** to submit your comment. Once your comment is submitted, the system will mark your Case as *Resolved*.

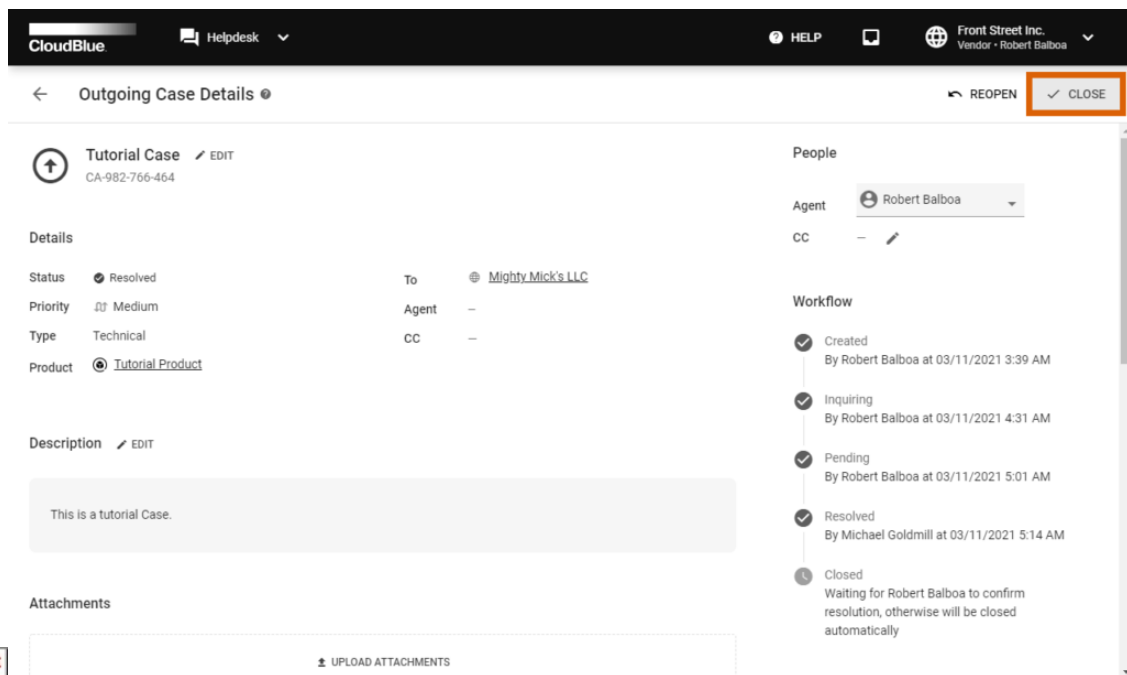
The screenshot shows the 'Incoming Case Details' page for a 'Tutorial Case' (CA-982-766-464). The 'Status' dropdown is highlighted with an orange box and shows 'Inquiring' selected. The 'Workflow' section on the right shows a timeline: Created (03/11/2021 3:39 AM), Inquiring (03/11/2021 4:31 AM), Pending (03/11/2021 3:39 AM), Resolved, and Closed. The 'Attachments' section at the bottom has an 'UPLOAD ATTACHMENTS' button.

Thus, the system will ask Case creators to confirm that this Case is resolved and close it. It is also possible to reopen a Case and bring it back to the *Pending* state by clicking the **Reopen** button and submitting a comment.

Closing Cases

Once an **Outgoing** Case was marked as *Resolved*, its creators can close this Case from the **Case details** screen. The system also closes resolved Cases automatically after the time period specified in the Account module. Follow the steps below to manually close your resolved Case.

1. Click the **Close** button from the Case details screen.



CloudBlue Helpdesk

HELP

Front Street Inc.
Vendor - Robert Balboa

← Outgoing Case Details ●

REOPEN CLOSE

Tutorial Case EDIT
CA-982-766-464

Details

Status: Resolved To: Mighty Mick's LLC
Priority: Medium Agent: -
Type: Technical CC: -
Product: Tutorial Product

Description EDIT
This is a tutorial Case.

Attachments
UPLOAD ATTACHMENTS

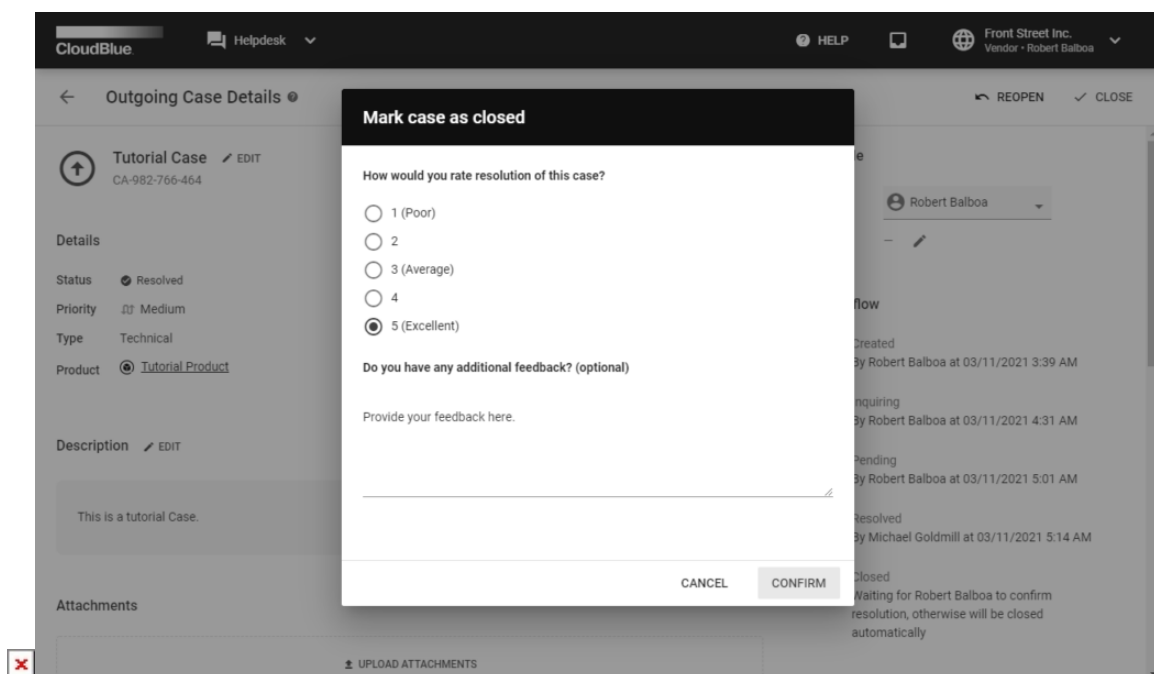
People
Agent: Robert Balboa
CC: -

Workflow

- Created By Robert Balboa at 03/11/2021 3:39 AM
- Inquiring By Robert Balboa at 03/11/2021 4:31 AM
- Pending By Robert Balboa at 03/11/2021 5:01 AM
- Resolved By Michael Goldmill at 03/11/2021 5:14 AM
- Closed Waiting for Robert Balboa to confirm resolution, otherwise will be closed automatically

2. Fill out the following **optional** form:

- Rate the resolution of your Case from **1** (Poor) to **5** (Excellent).
- Provide your feedback to the field below.



CloudBlue Helpdesk

HELP

Front Street Inc.
Vendor - Robert Balboa

← Outgoing Case Details ●

REOPEN CLOSE

Tutorial Case EDIT
CA-982-766-464

Details

Status: Resolved To: Mighty Mick's LLC
Priority: Medium Agent: -
Type: Technical CC: -
Product: Tutorial Product

Description EDIT
This is a tutorial Case.

Attachments
UPLOAD ATTACHMENTS

Mark case as closed

How would you rate resolution of this case?

☐ 1 (Poor)
☐ 2
☐ 3 (Average)
☐ 4
☒ 5 (Excellent)

Do you have any additional feedback? (optional)

Provide your feedback here.

CANCEL CONFIRM

3. Click **Confirm** to successfully close your Case. The system will mark this Case as *Closed* and will display the resolution on the Case details screen.



CloudBlue

Helpdesk

HELP

Front Street Inc.
Vendor - Robert Balboa

← Outgoing Case Details

↑

Tutorial Case

CA-982-766-464

Details

Status

Closed

Priority

Medium

Type

Technical

Product

Tutorial Product

RESOLUTION

Rate

5 (Excellent)

Tutorial Case is solved.

Description

This is a tutorial Case.

To

Mighty Mick's LLC

Agent

—

CC

—

People

Agent

Robert Balboa

CC

—

Workflow

Created

By Robert Balboa at 03/11/2021 3:39 AM

Inquiring

By Robert Balboa at 03/11/2021 4:31 AM

Pending

By Robert Balboa at 03/11/2021 5:01 AM

Resolved

By Michael Goldmill at 03/11/2021 5:14 AM

Closed

Workflow has been successfully completed by Robert Balboa at 03/11/2021 5:39 AM

Therefore, you will not be able to reopen this closed Case. However, it is still possible to add comments and upload attachments within your closed Cases.