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Documentation Modules Helpdesk

Helpdesk Interface

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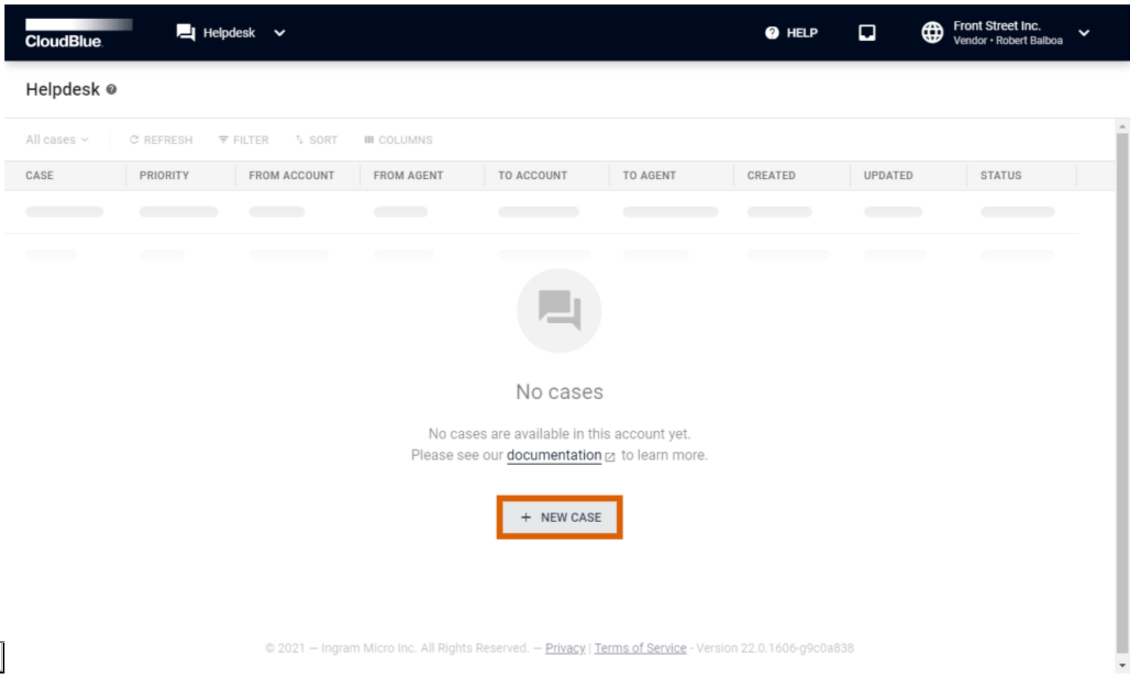
The following describes available operations within the Helpdesk module on the CloudBlue Connect platform, such as creating a Case, inquiring additional information, closing Cases, and more.

Creating Cases

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

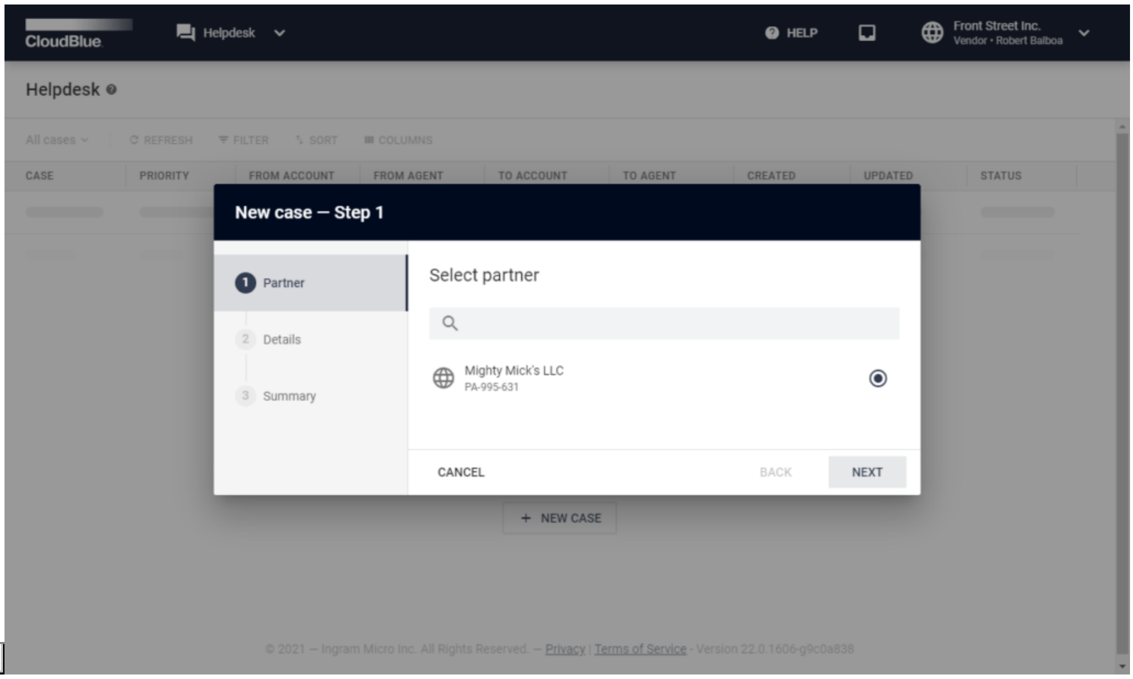
Click the **New Case** button to launch a case creation wizard.



Follow the wizard instructions to successfully create a new Case.

1. Select your Partner

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

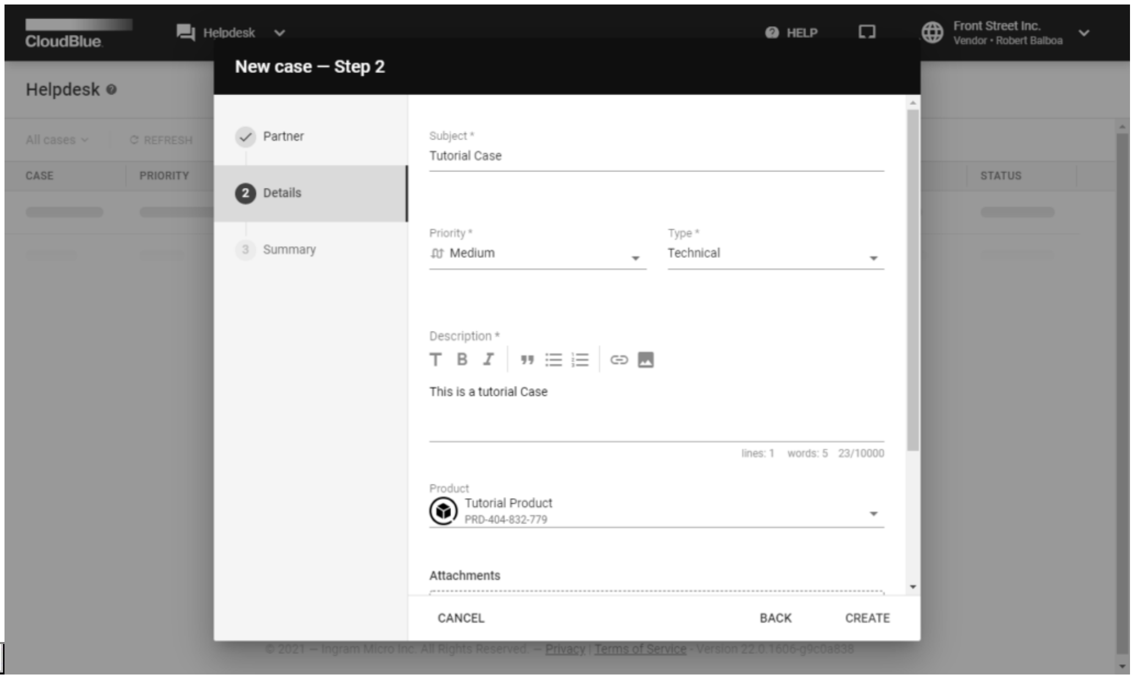


Click the **Next** button to continue.

2. Specify Case details

Fill out the following details form:

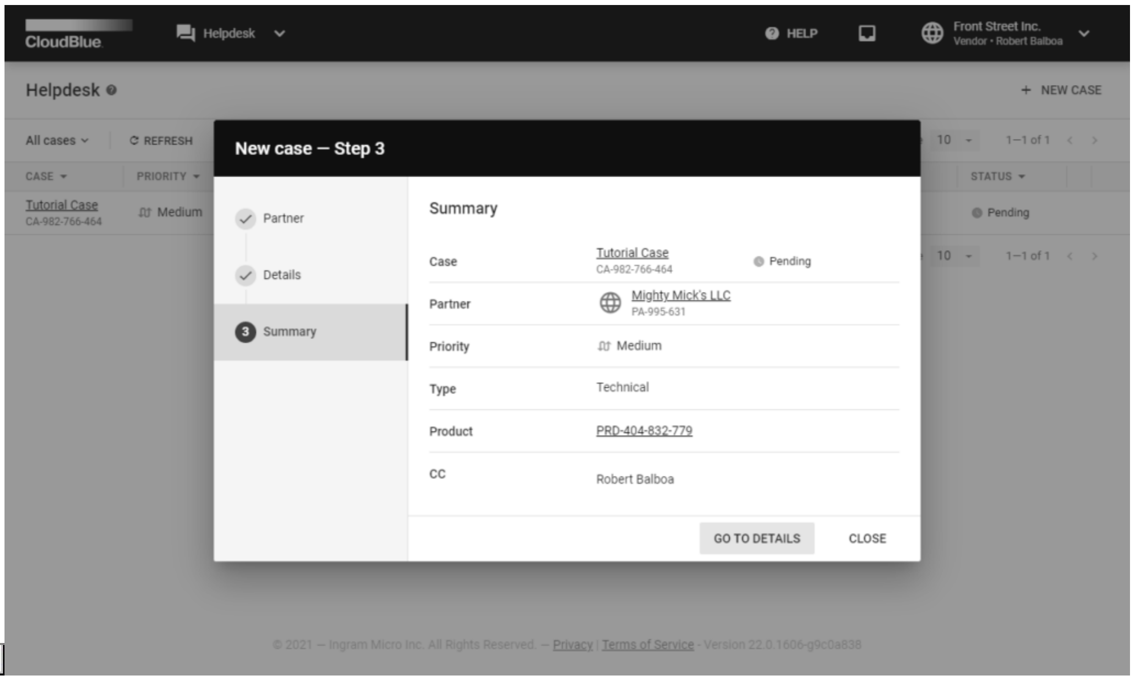
- **Subject:** Enter your Case subject (Case name) in this field.
- **Priority:** Select priority from the list (Low, Medium, High, or Urgent).
- **Type**: Choose a *Business* or *Technical* issue type.
- **Description**: Enter your Case description in this field.
- **Product**: Specify a product for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



Click **Create** to create your Case.

3. Review your summary

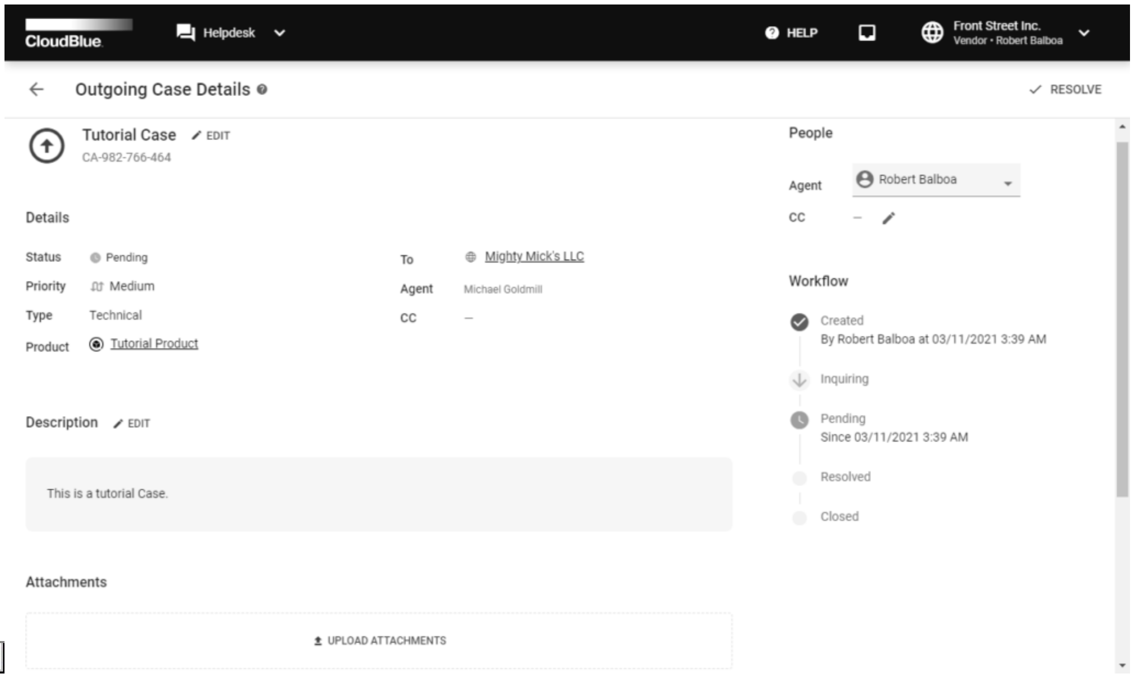
Once your case is successfully created, the system provides your case summary.



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**.

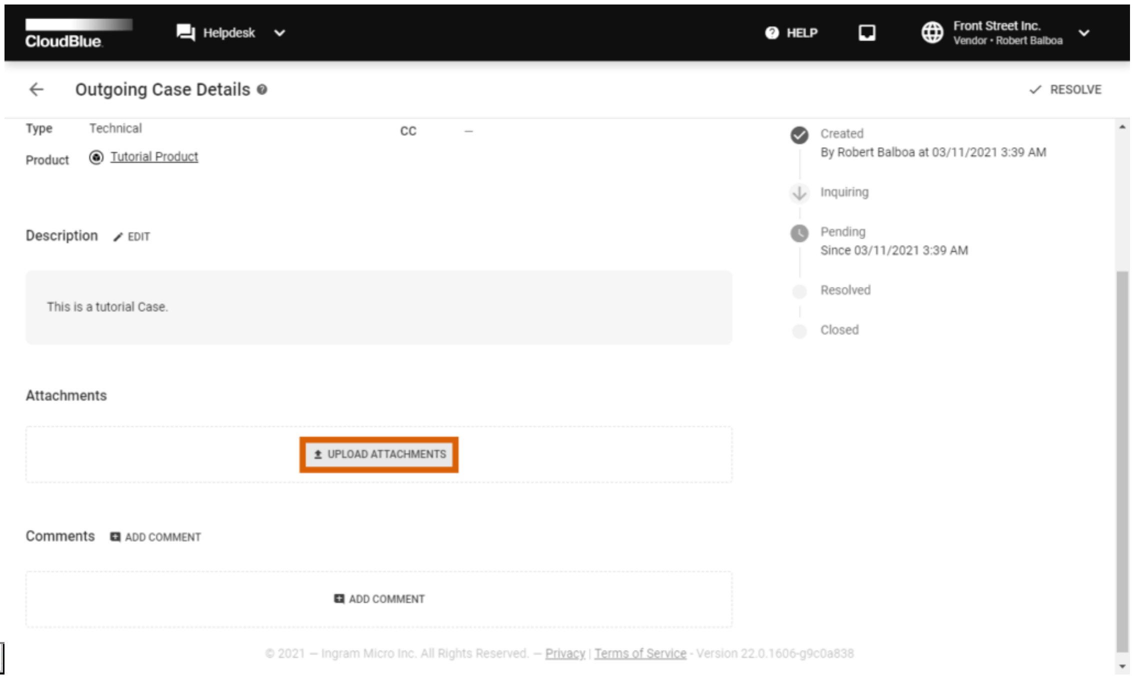
The **Workflow** bar indicates the current state of your Case, associated users and dates. The Workflow bar also showcases completed states and the following states of this Case.

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.

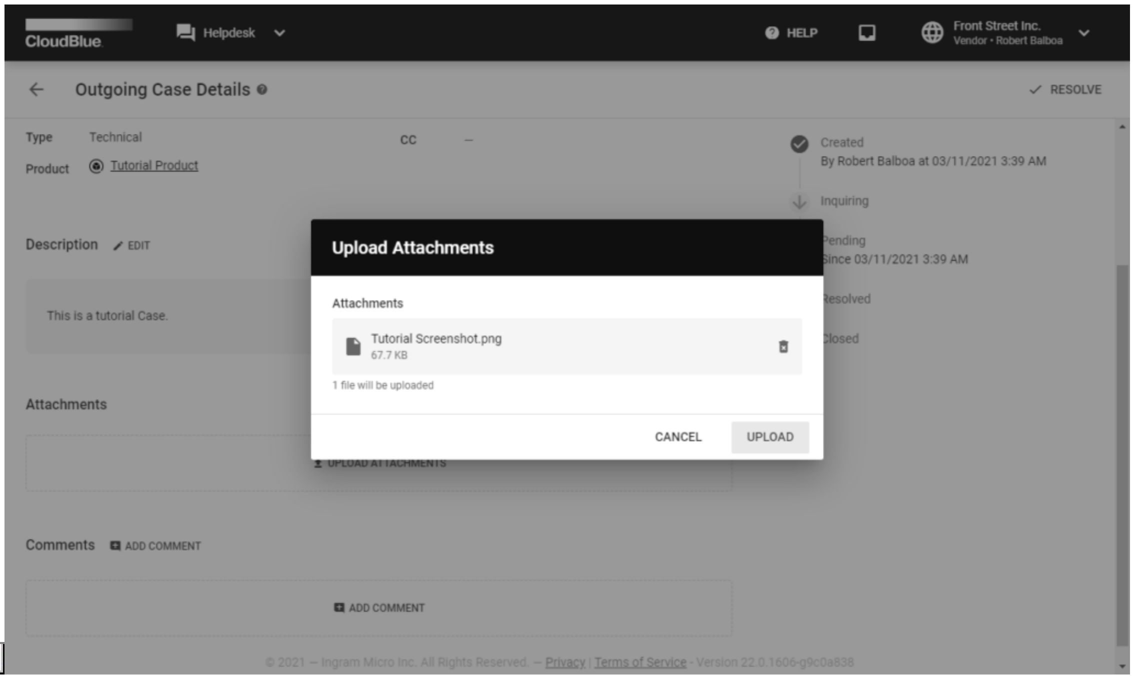
Uploading Attachments

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.



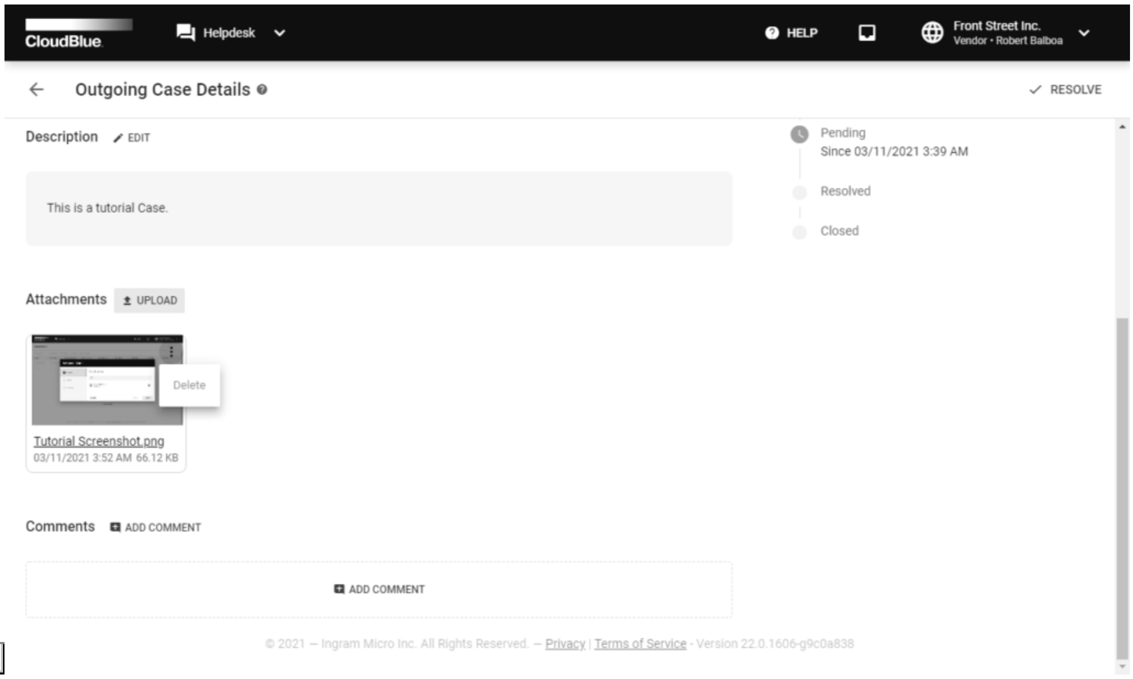
2. Drag or select your files to the corresponding zone in the following **Attachments** form.



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.

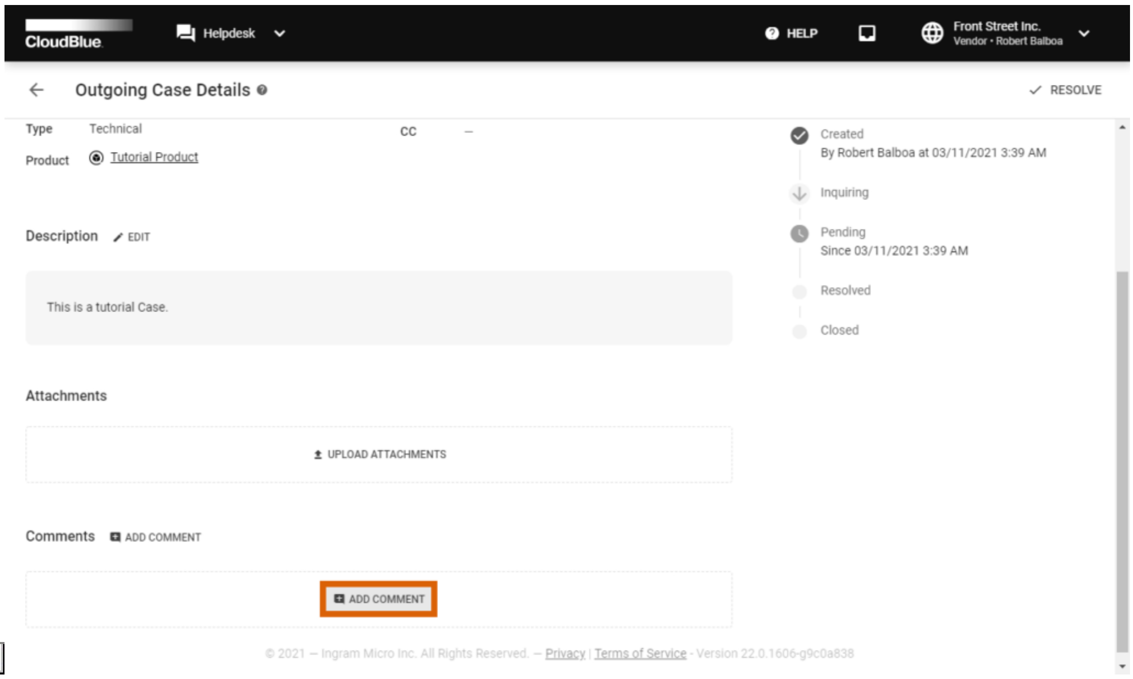


Upload or delete your files by using the corresponding buttons on the user interface.

Adding Comments

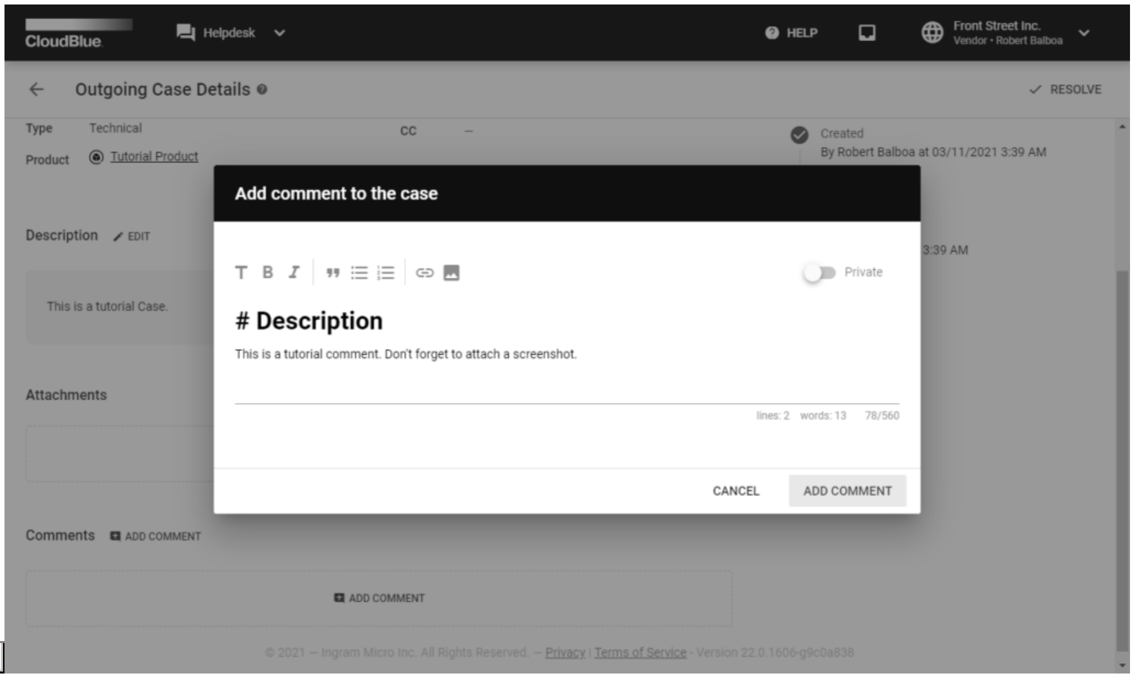
The **Comments** field is used to submit messages for Partners or to leave a *Private* message for users of your account. This field also displays the system messages. Follow the steps below to add a comment.

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

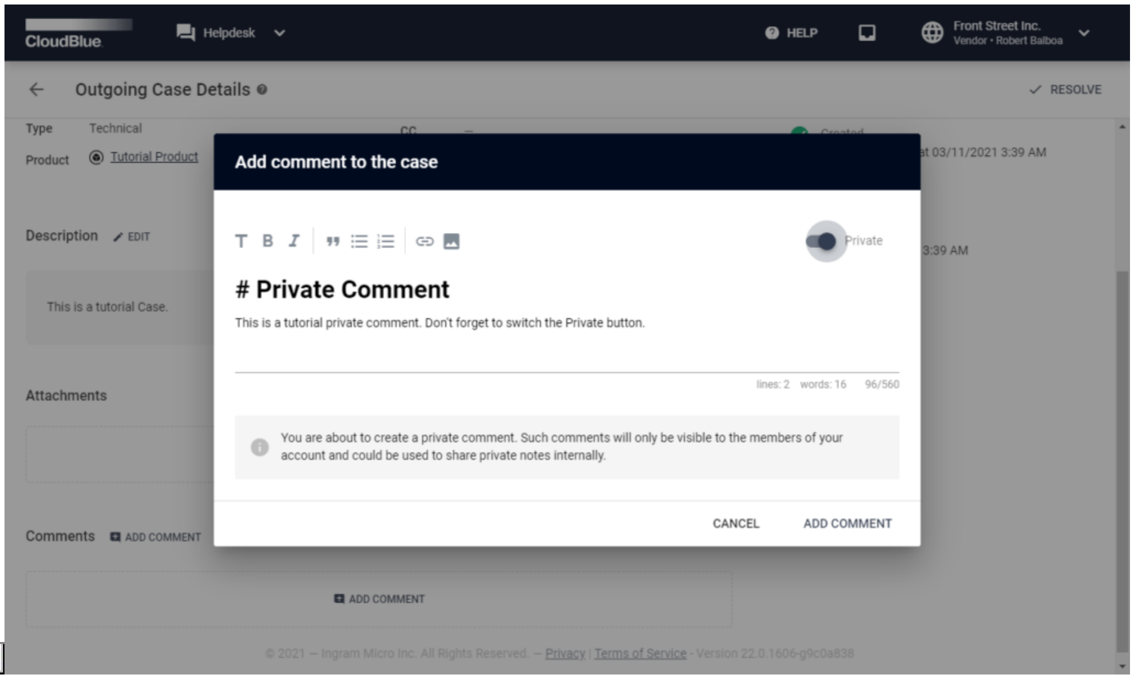


2. Enter your comment into the **Comments** form.

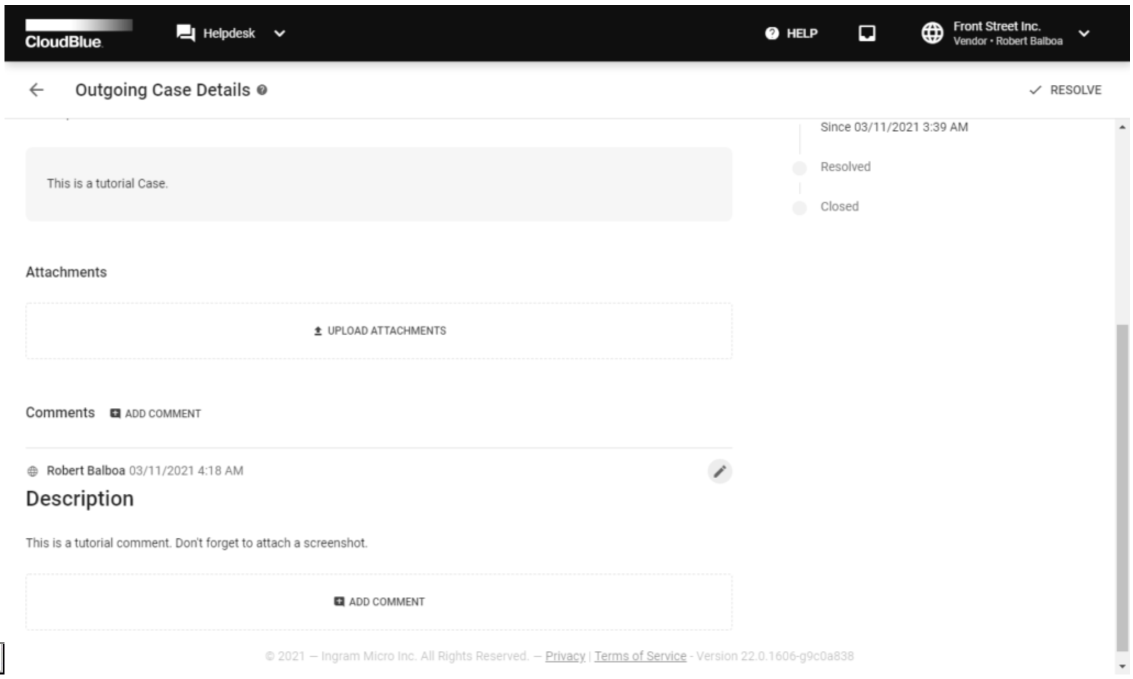
> Advice
>
> Use corresponding buttons on the user interface to edit your text (create headings, quotes, etc.), insert links, or attach images. Furthermore, it is recommended to submit a message with less than 560 symbols.



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.



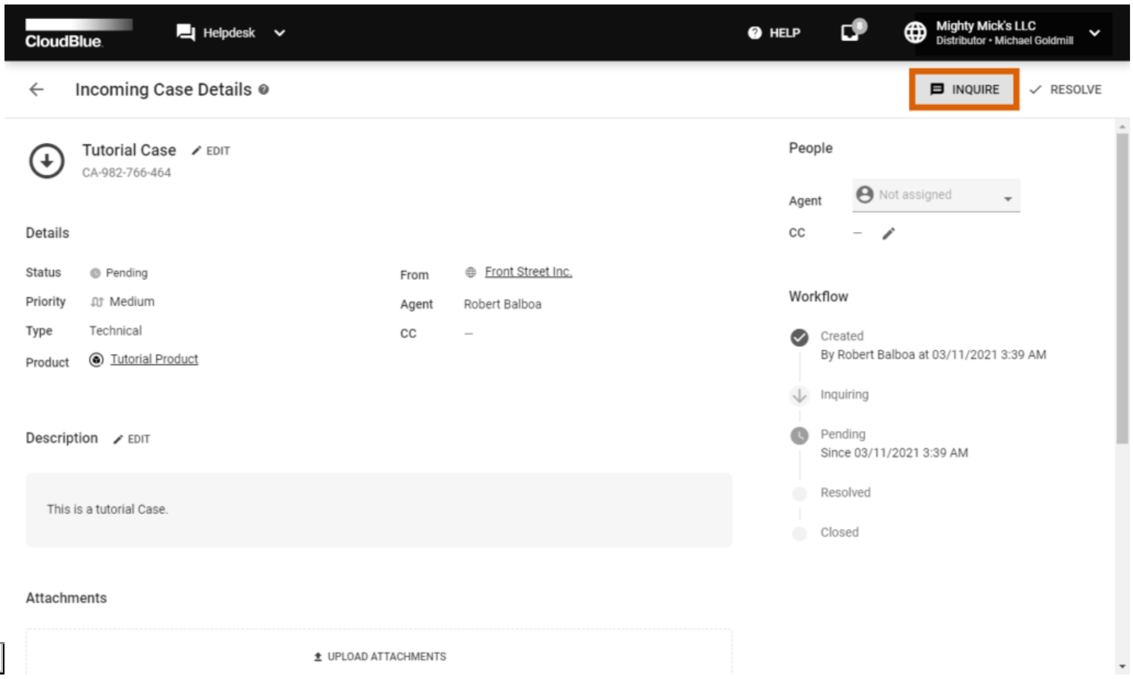
It is possible to edit your comments by clicking on the **Edit** icon next to your submitted comment.

Inquiring data

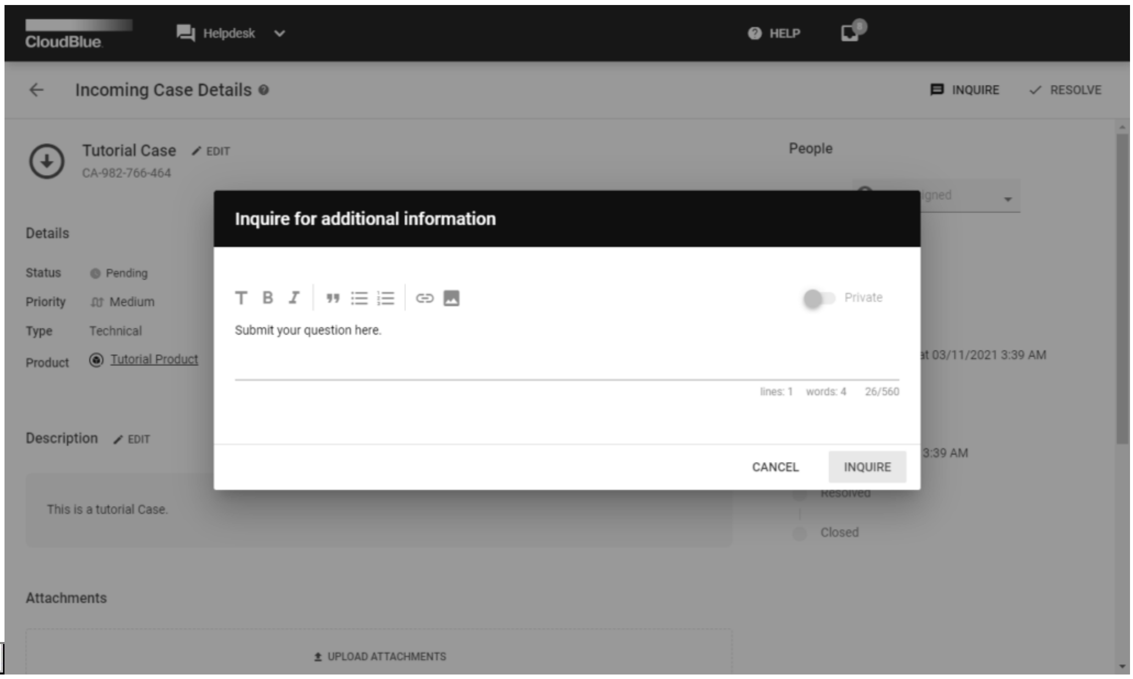
If more information is required for your **Incoming** Case, you can inquire additional information from the **Case details** screen.

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

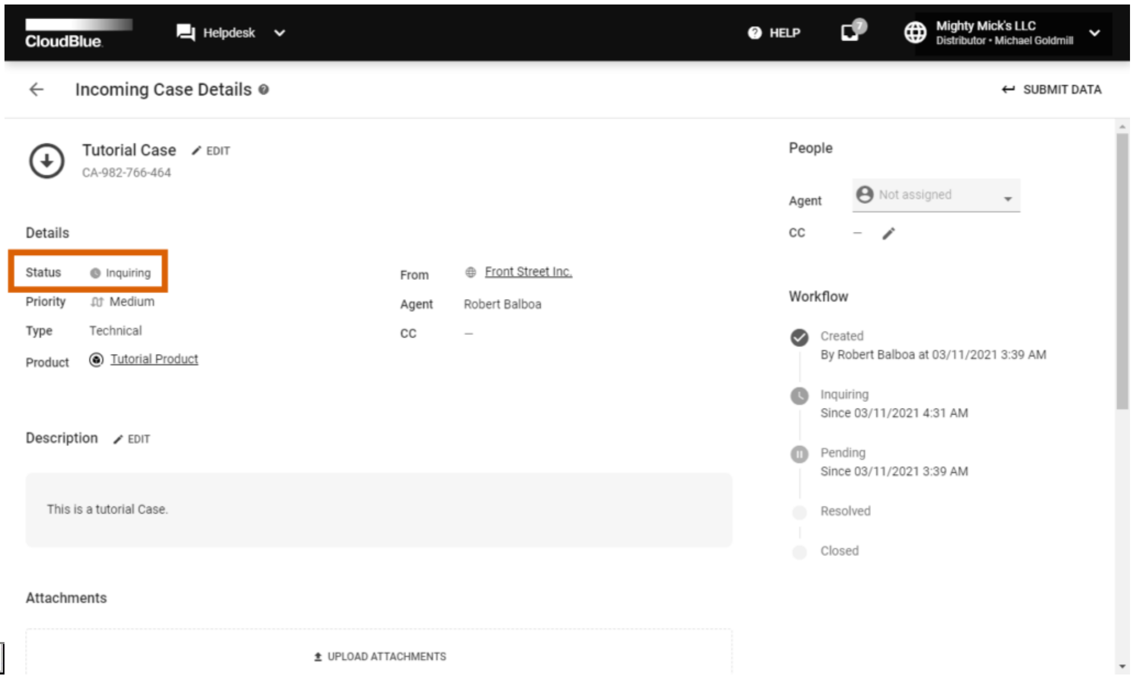
1. Click the **Inquire** button to inquire information from your Partner.



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.

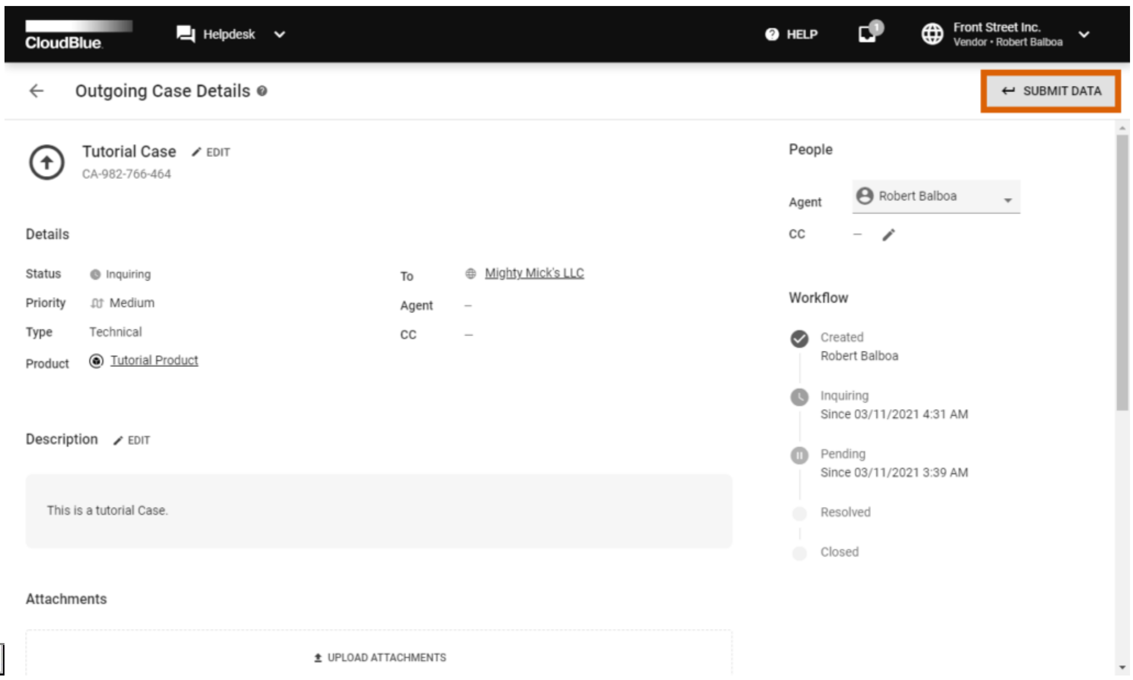


Thus, your Partner will be requested to submit required data to the specified Case.

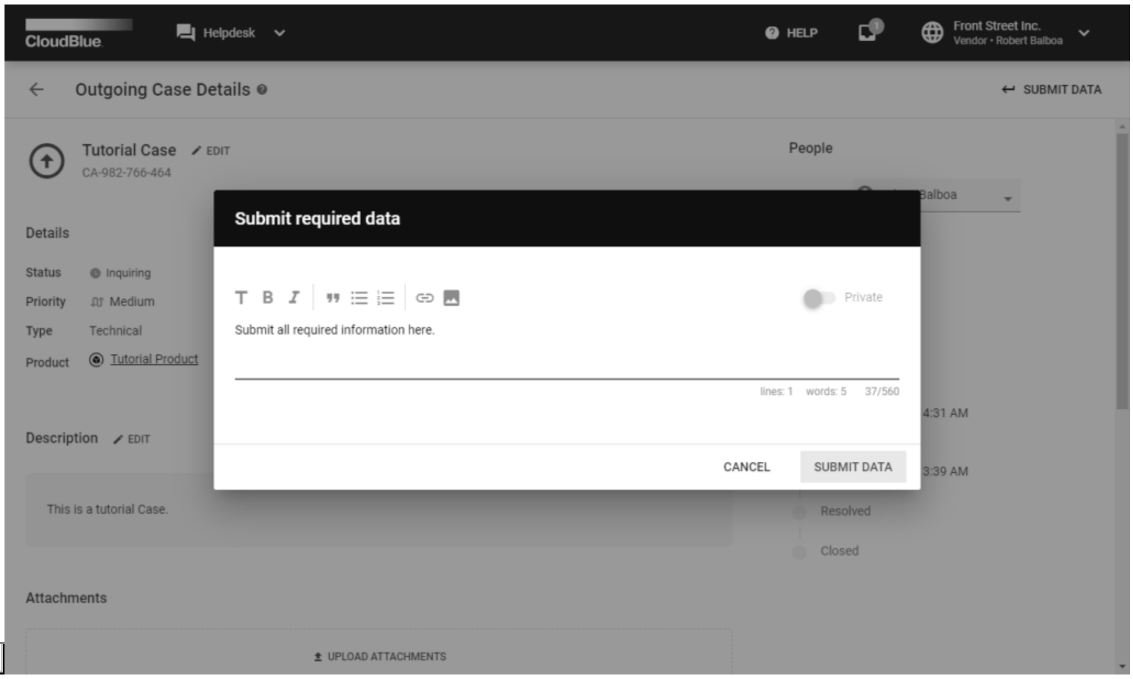
Submitting data

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.

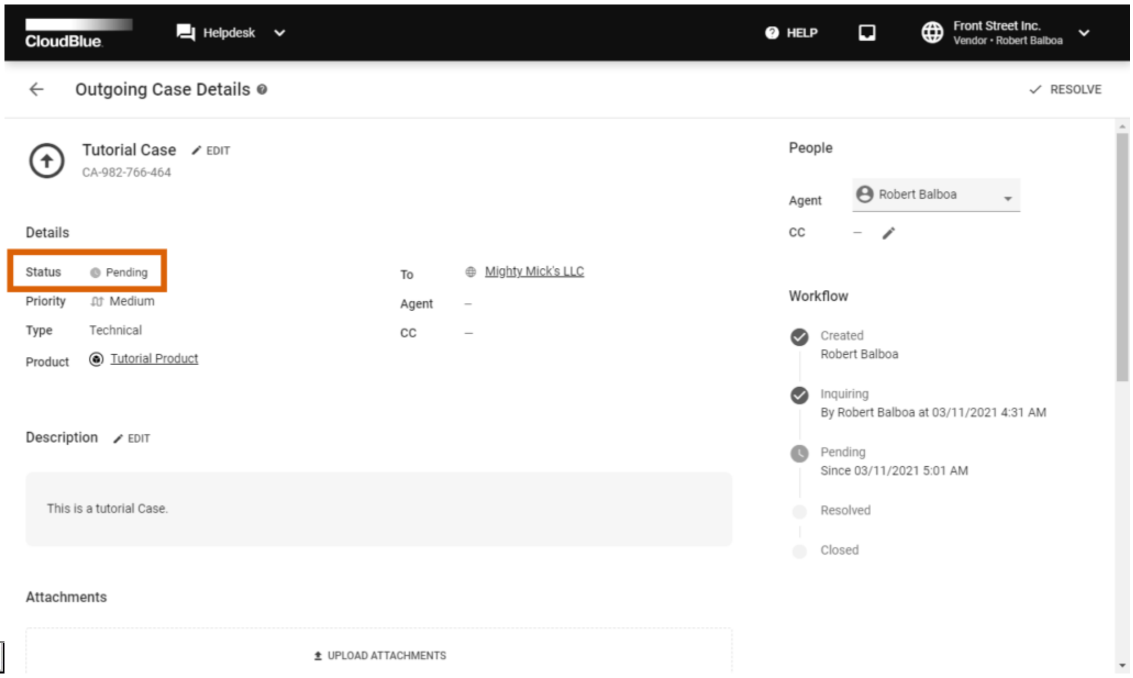
1. Click the **Submit Data** button from the Case details screen.



2. Provide required information into the following form.



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

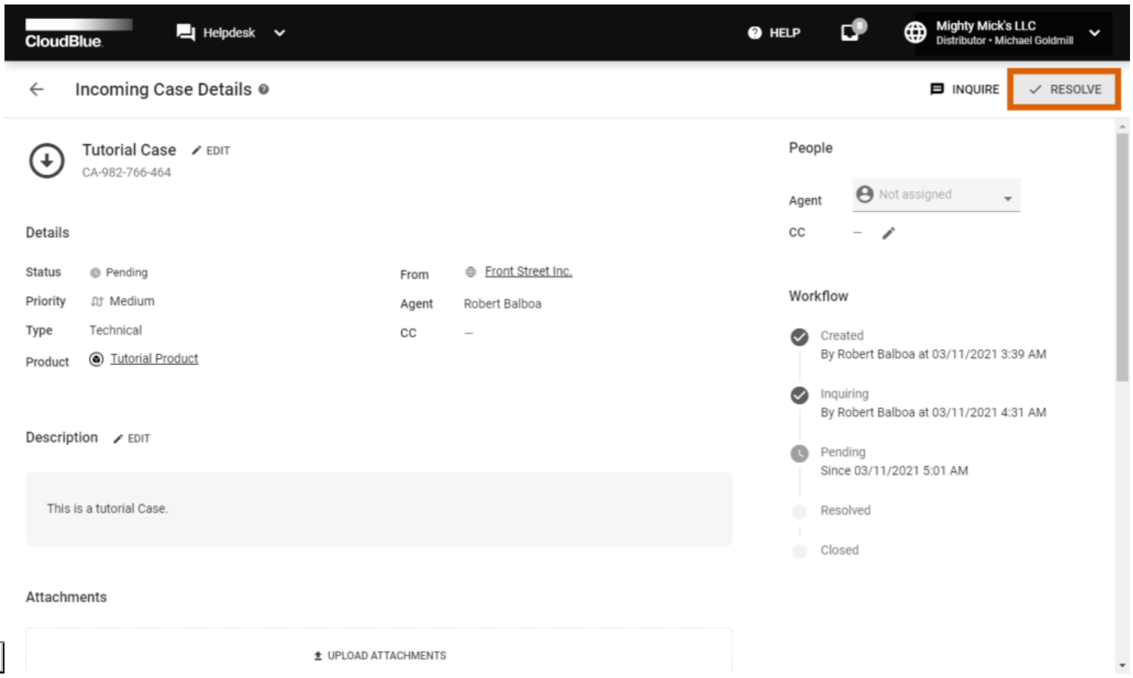


Therefore, your required data will be submitted and the case will be successfully updated.

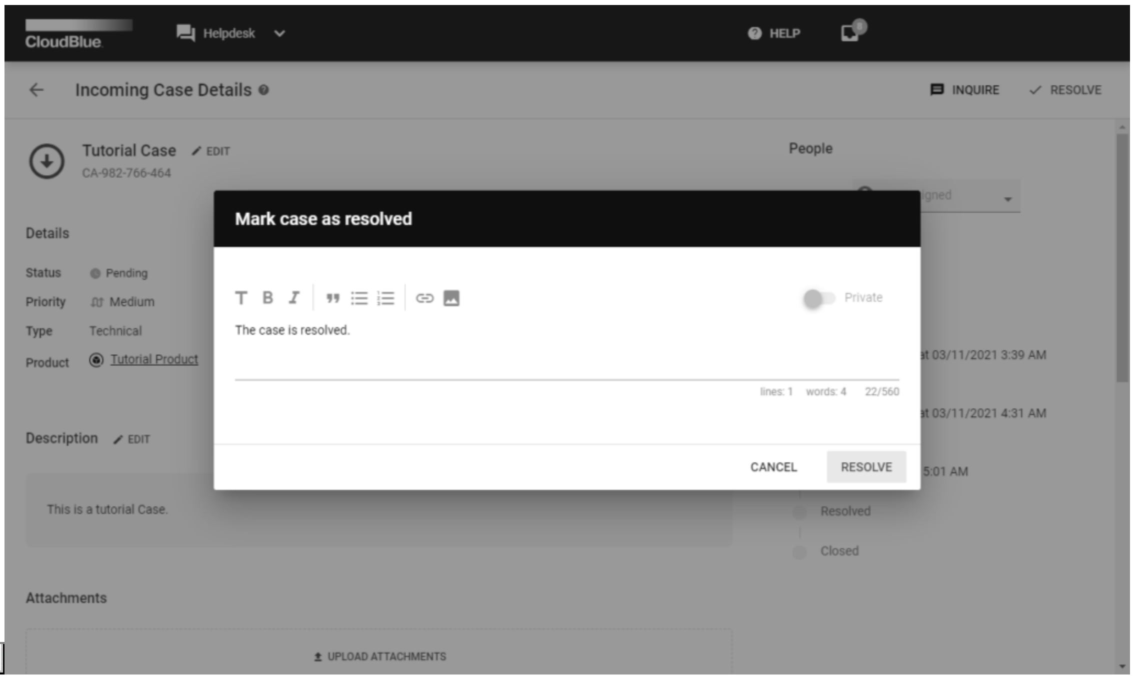
Resolving Cases

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

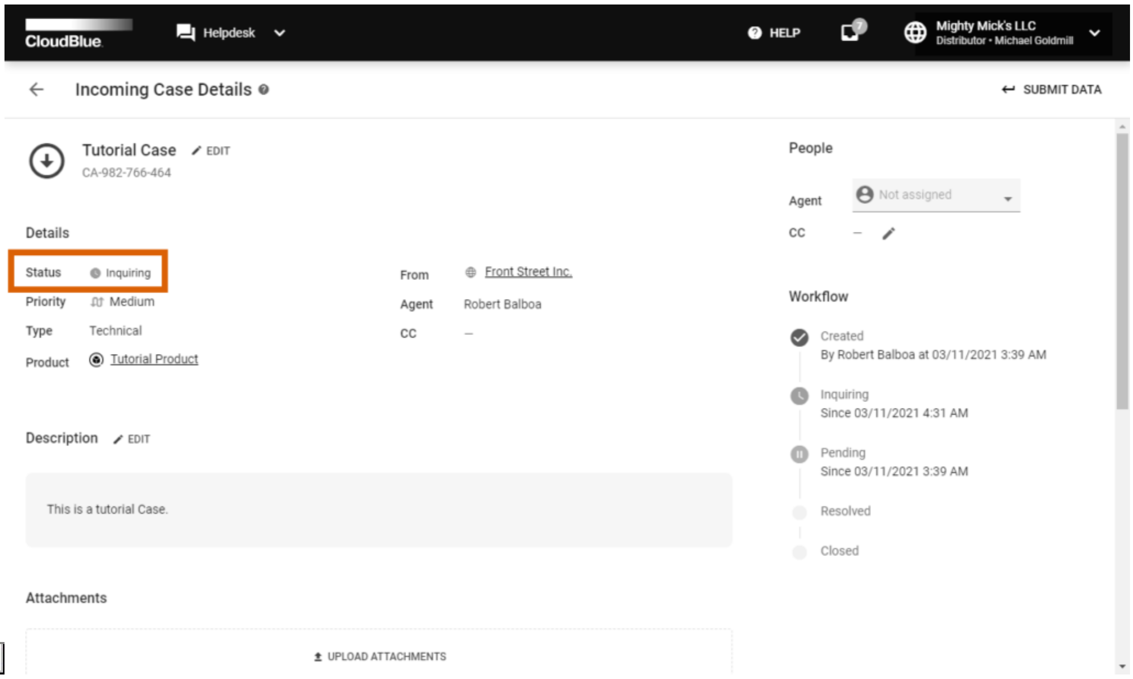
1. Click the **Resolve** button from the Case details screen.



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



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

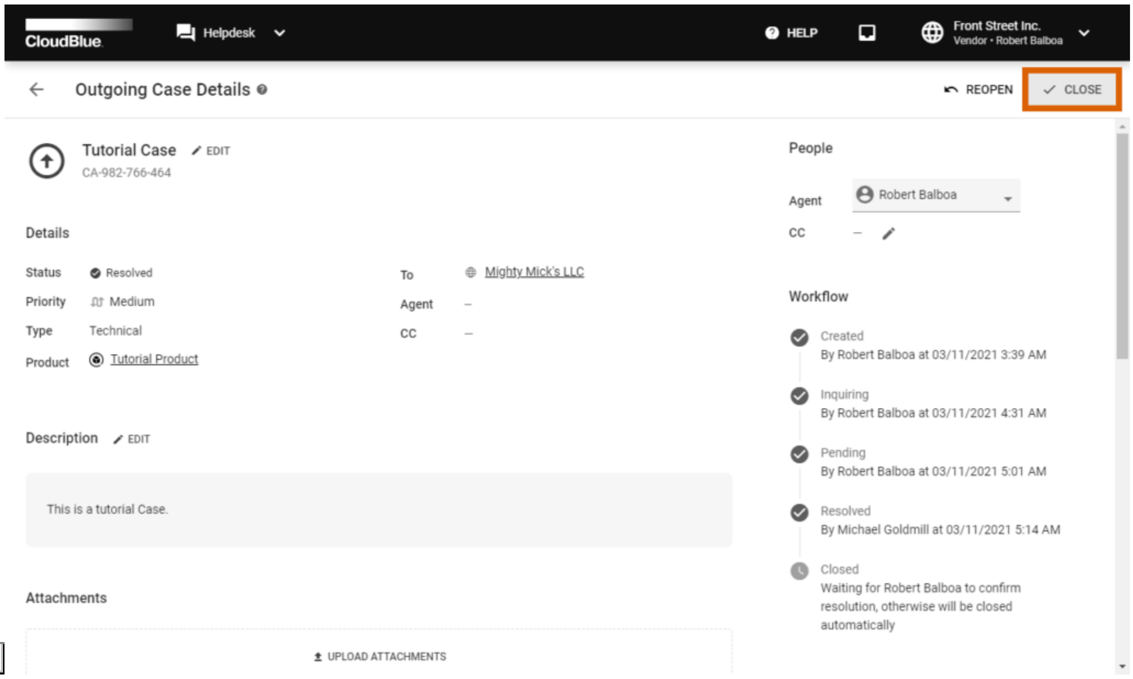


Thus, the system will ask Case creators to confirm that this Case is resolved and close it. It is also possible to reopen a Case and bring it back to the *Pending* state by clicking the **Reopen** button and submitting a comment.

Closing Cases

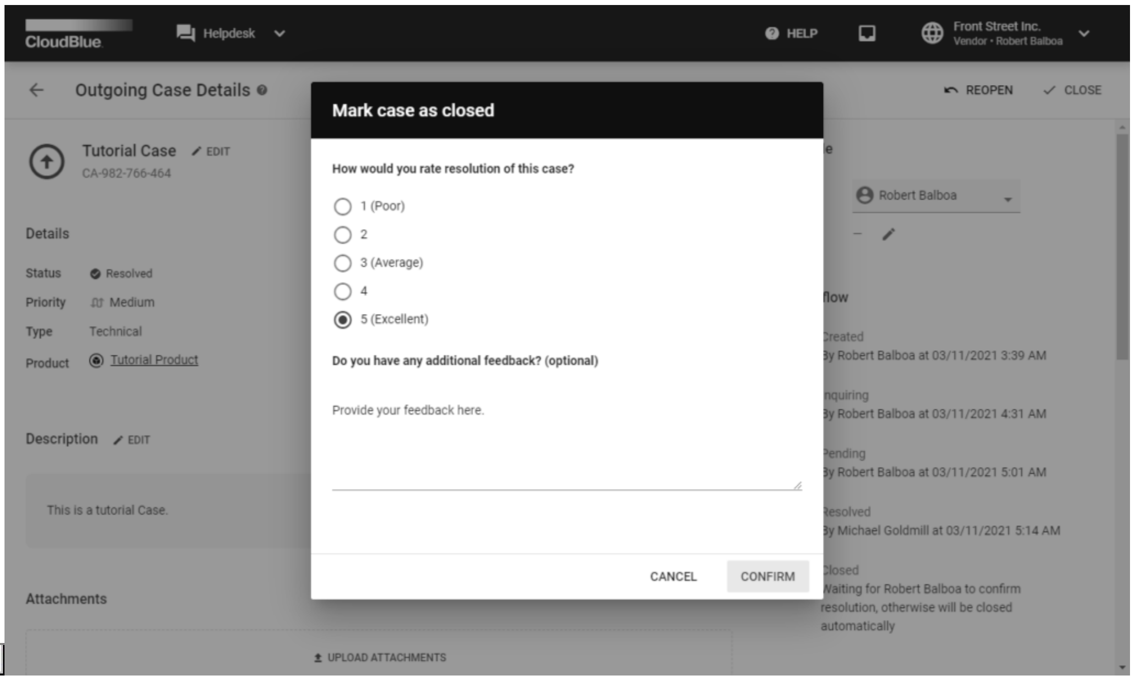
Once an **Outgoing** Case was marked as *Resolved,* its creators can close this Case from the **Case details** screen. The system also closes resolved Cases automatically after the time period specified in the Account module. Follow the steps below to manually close your resolved Case.

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

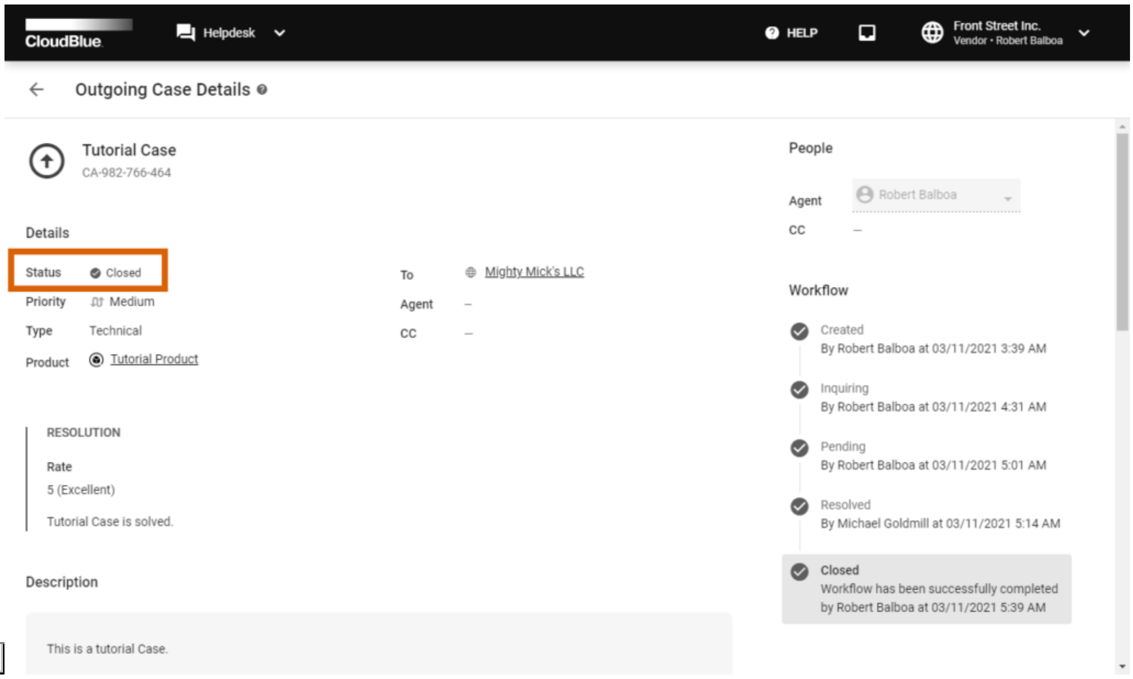


2. Fill out the following **optional** form:

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



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.



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.