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Documentation Modules Helpdesk

Helpdesk Interface



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Auto-generated at February 11, 2026

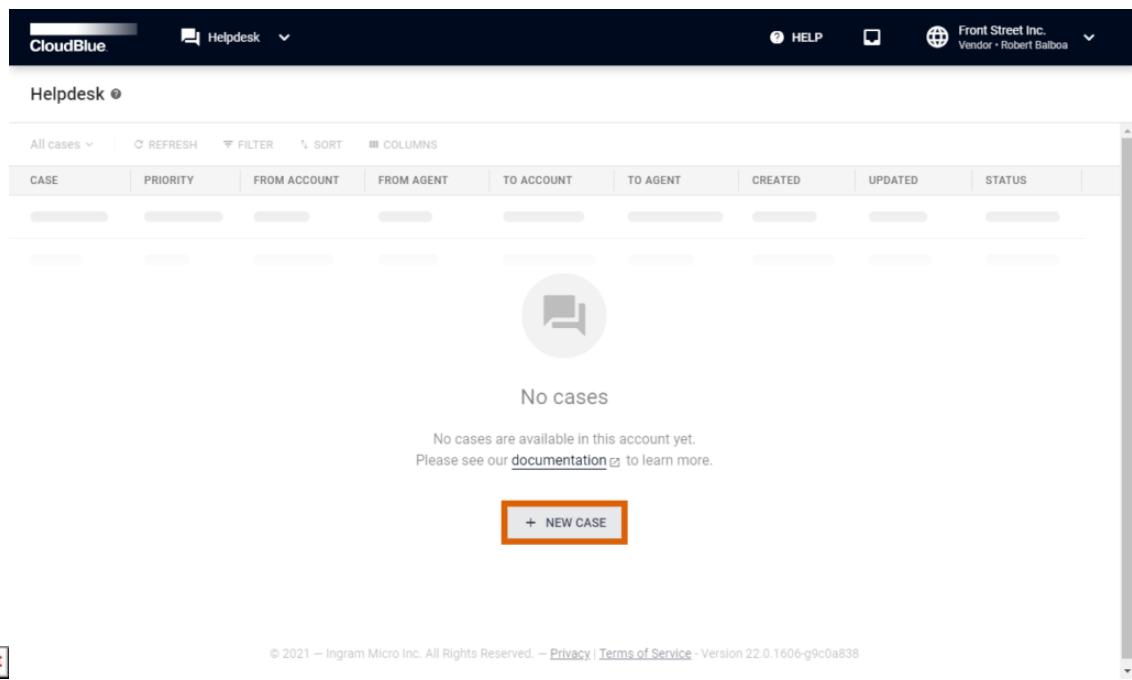


The following describes available operations within the Helpdesk module on the CloudBlue Connect platform, such as creating a Case, inquiring additional information, closing Cases, and more.

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.

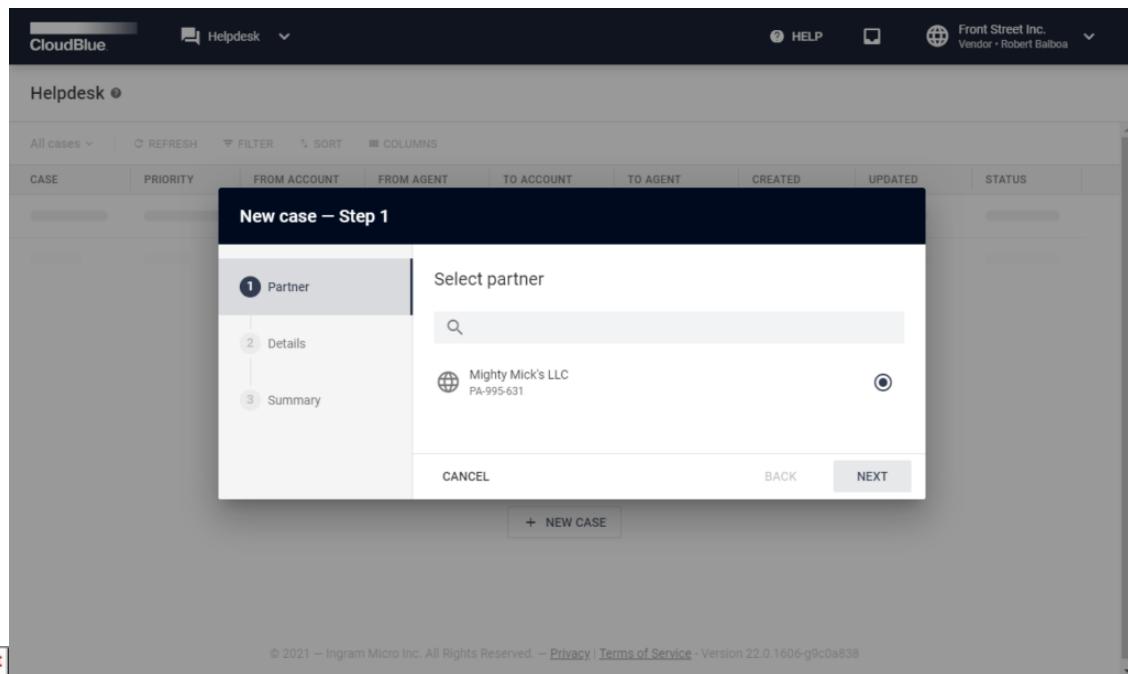


The screenshot shows the CloudBlue Connect Helpdesk interface. The top navigation bar includes the CloudBlue logo, a Helpdesk dropdown, a Help link, and a user account for 'Front Street Inc. Vendor - Robert Balboa'. The main title is 'Helpdesk'. Below the title is a toolbar with 'All cases', 'REFRESH', 'FILTER', 'SORT', and 'COLUMNS' buttons. A table header row contains columns for CASE, PRIORITY, FROM ACCOUNT, FROM AGENT, TO ACCOUNT, TO AGENT, CREATED, UPDATED, and STATUS. A large central message states 'No cases' with a note: 'No cases are available in this account yet. Please see our [documentation](#) to learn more.' A prominent red-outlined button labeled '+ NEW CASE' is located at the bottom of the list area. The footer contains the copyright notice: '© 2021 – Ingram Micro Inc. All Rights Reserved. – [Privacy](#) | [Terms of Service](#) - Version 22.0.1606-g9c0a838'.

Follow the wizard instructions to successfully create a new Case.

1. Select your Partner

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

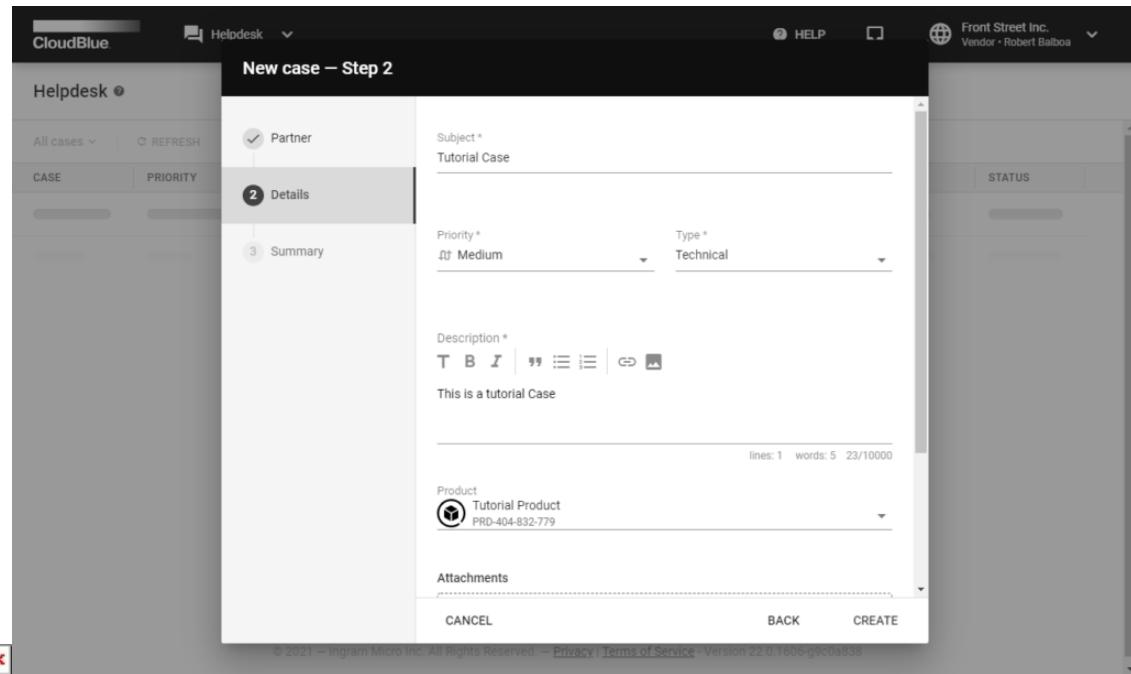


Click the **Next** button to continue.

2. Specify Case details

Fill out the following details form:

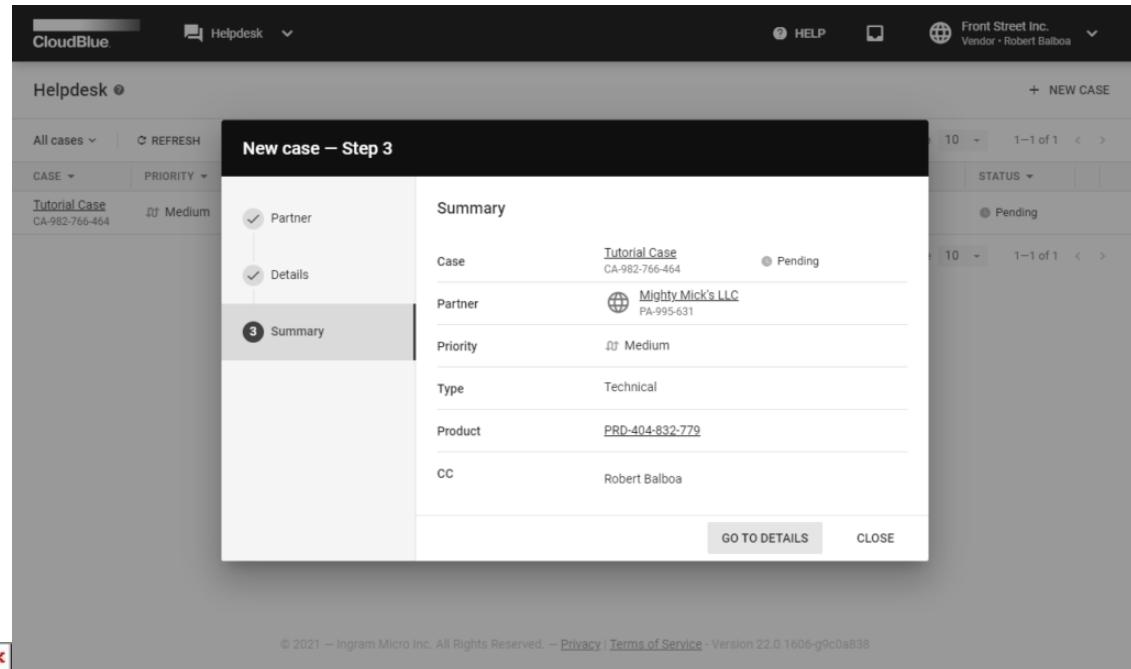
- **Subject:** Enter your Case subject (Case name) in this field.
- **Priority:** Select priority from the list (Low, Medium, High, or Urgent).
- **Type:** Choose a *Business* or *Technical* issue type.
- **Description:** Enter your Case description in this field.
- **Product:** Specify a product for 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.

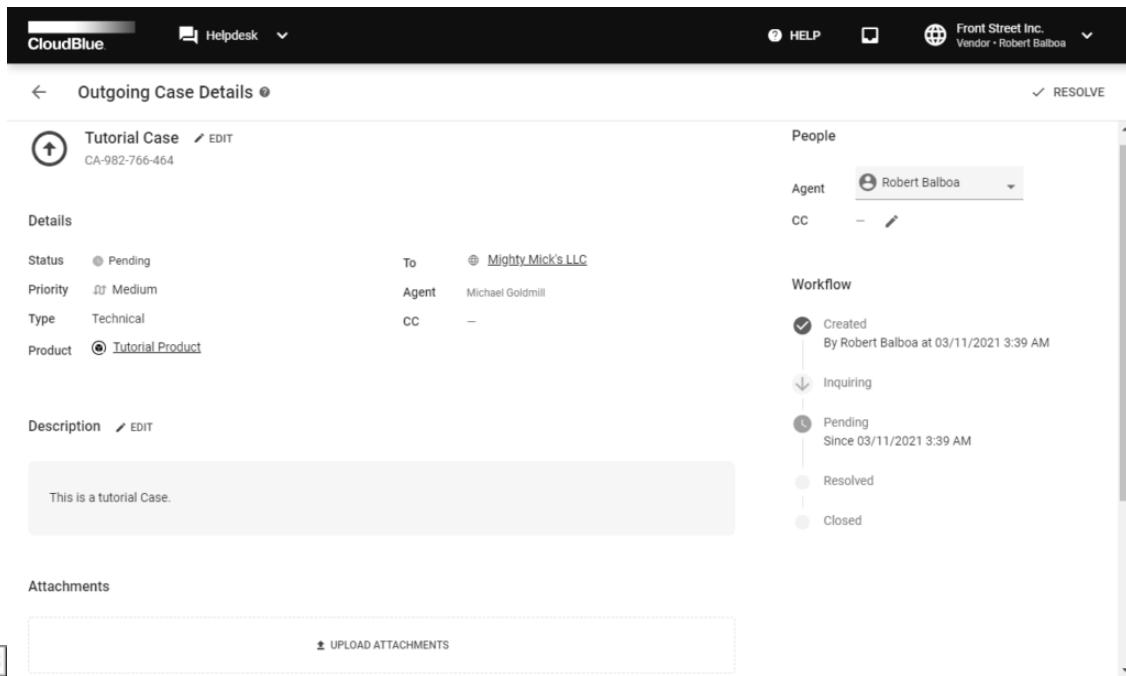


Click **Go to Details** to access the Case details screen. Otherwise, click **Close** to close the summary.



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.

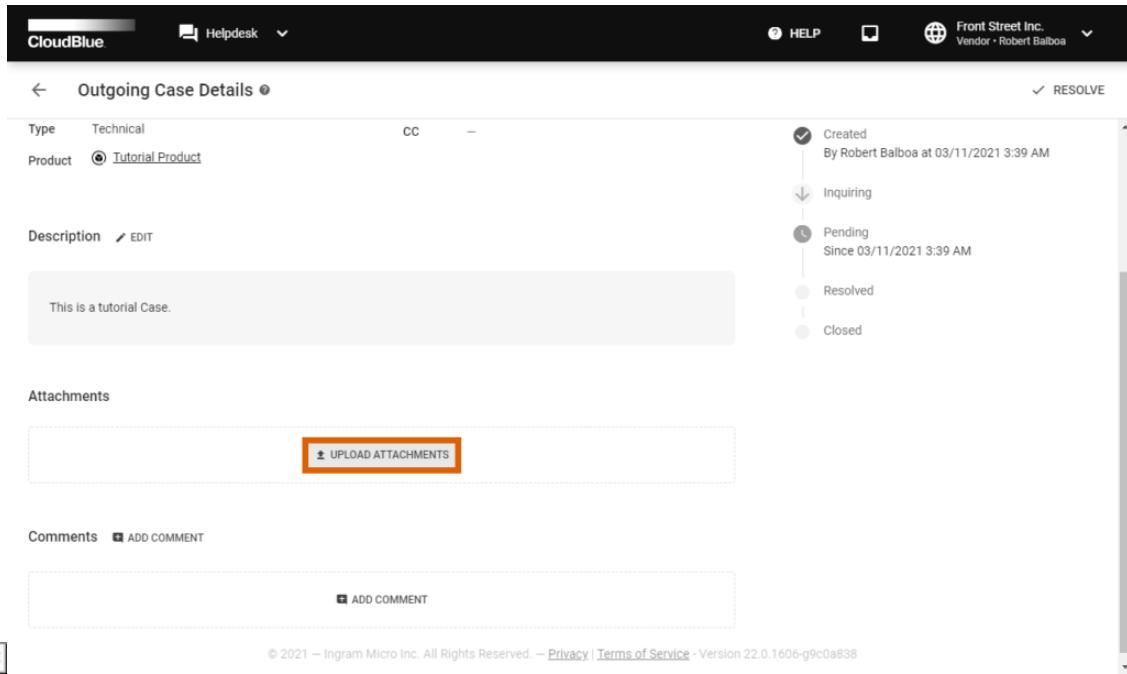
The **Workflow** bar indicates the current state of your Case, associated users and dates. The Workflow bar also showcases completed states and the following states of this Case.

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

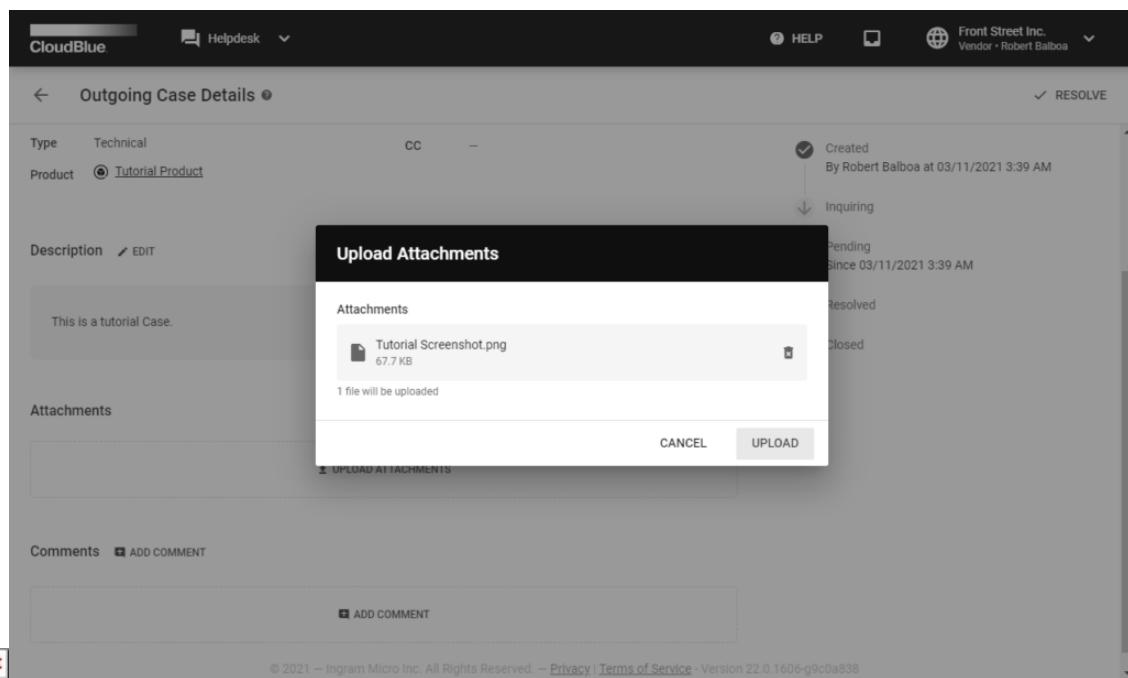
The **Attachments** field allows uploading additional files, such as screenshots, pictures, logs, and so on. Attachments can be especially helpful for technical issues. Follow the steps below to successfully upload your file

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



The screenshot shows the 'Outgoing Case Details' page. At the top, there are navigation links for 'CloudBlue', 'Helpdesk', 'Help', and 'Front Street Inc.' with a user 'Robert Balboa'. On the right, there's a 'RESOLVE' button. The main content area has sections for 'Type' (Technical), 'Product' (Tutorial Product), 'Description' (This is a tutorial Case.), and 'Attachments'. The 'Attachments' section contains a large input field with a red border and a red 'UPLOAD ATTACHMENTS' button. Below this is a 'Comments' section with a red 'ADD COMMENT' button. On the far right, a vertical 'Workflow' bar shows the case status: 'Created' (checked), 'Inquiring', 'Pending', 'Resolved', and 'Closed'.

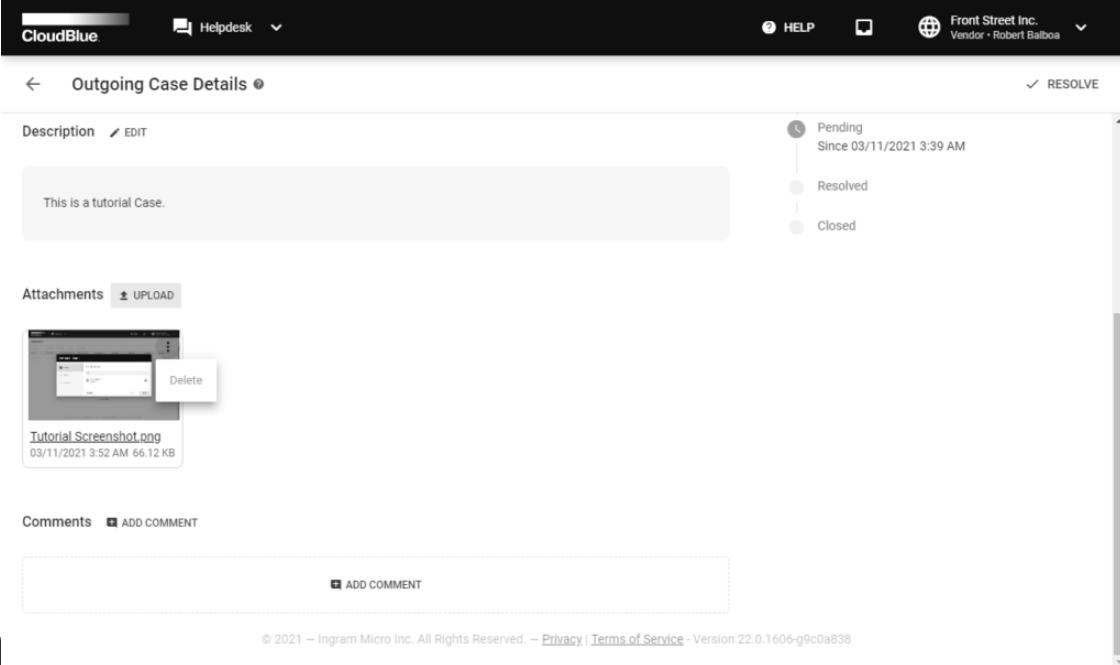
2. Drag or select your files to the corresponding zone in the following **Attachments** form.



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.



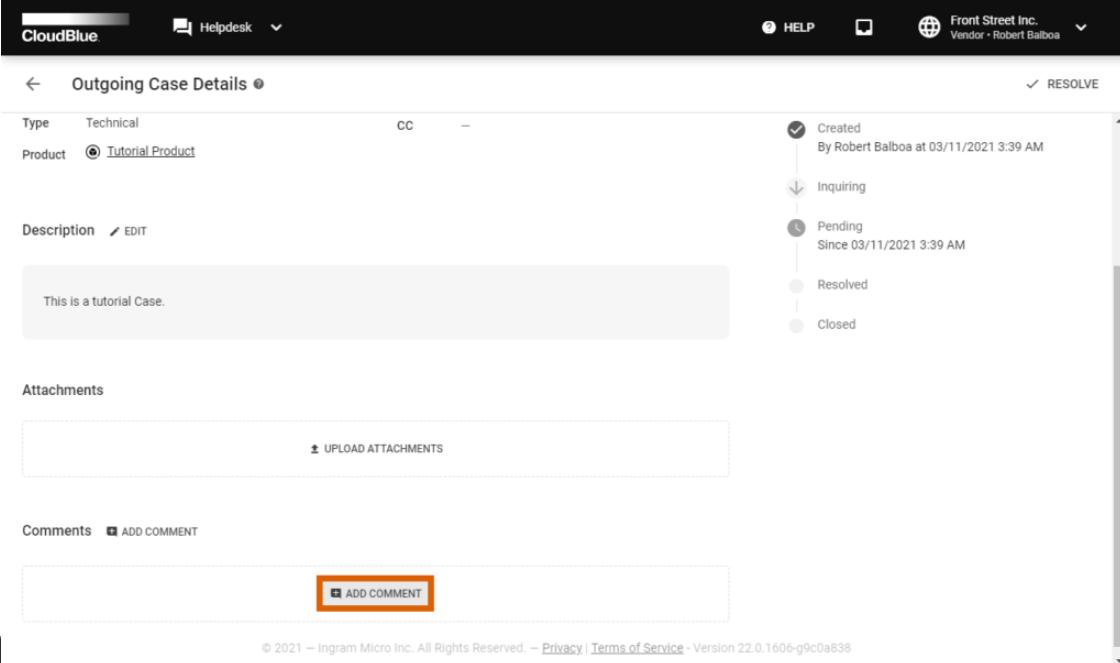
This screenshot shows the 'Outgoing Case Details' page. At the top, there are navigation links for 'CloudBlue', 'Helpdesk', 'HELP', and 'Front Street Inc. Vendor - Robert Balboa'. On the right, there is a 'RESOLVE' button with a checkmark. The main content area has a title 'Outgoing Case Details' with a back arrow. Below it is a 'Description' section with an 'EDIT' link and a text box containing the text 'This is a tutorial Case.' To the right of the text box is a status timeline with the following entries: 'Pending Since 03/11/2021 3:39 AM', 'Resolved', and 'Closed'. Under the 'Description' section is an 'Attachments' section with a 'UPLOAD' button and a thumbnail for 'Tutorial Screenshot.png' (3/11/2021 3:52 AM 66.12 KB). A 'Delete' button is shown over the thumbnail. Below the attachments is a 'Comments' section with an 'ADD COMMENT' button. A large empty box for adding a comment is shown below the button. At the bottom of the page is a copyright notice: '© 2021 – Ingram Micro Inc. All Rights Reserved. – [Privacy](#) | [Terms of Service](#) - Version 22.0.1606-g9c0a838'.

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.



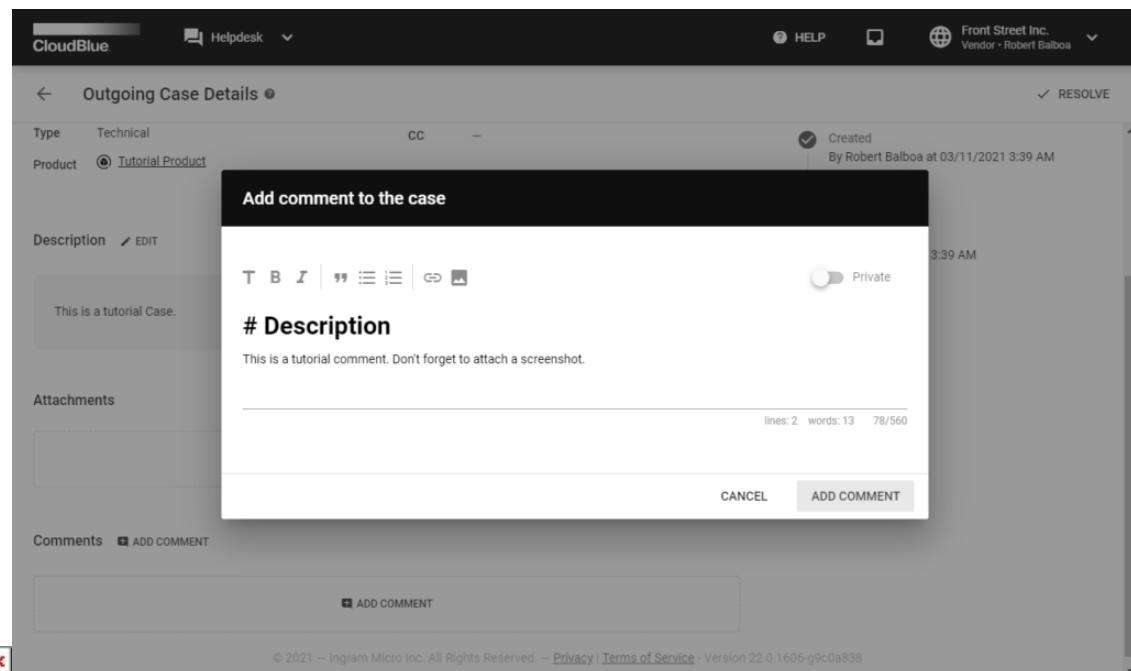
This screenshot shows the 'Outgoing Case Details' page. The layout is identical to the previous one, with the same navigation links and status timeline. The 'Comments' section is visible with its 'ADD COMMENT' button. The 'ADD COMMENT' button in the large empty comment box is highlighted with a red border. The copyright notice at the bottom is identical to the previous screenshot.

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

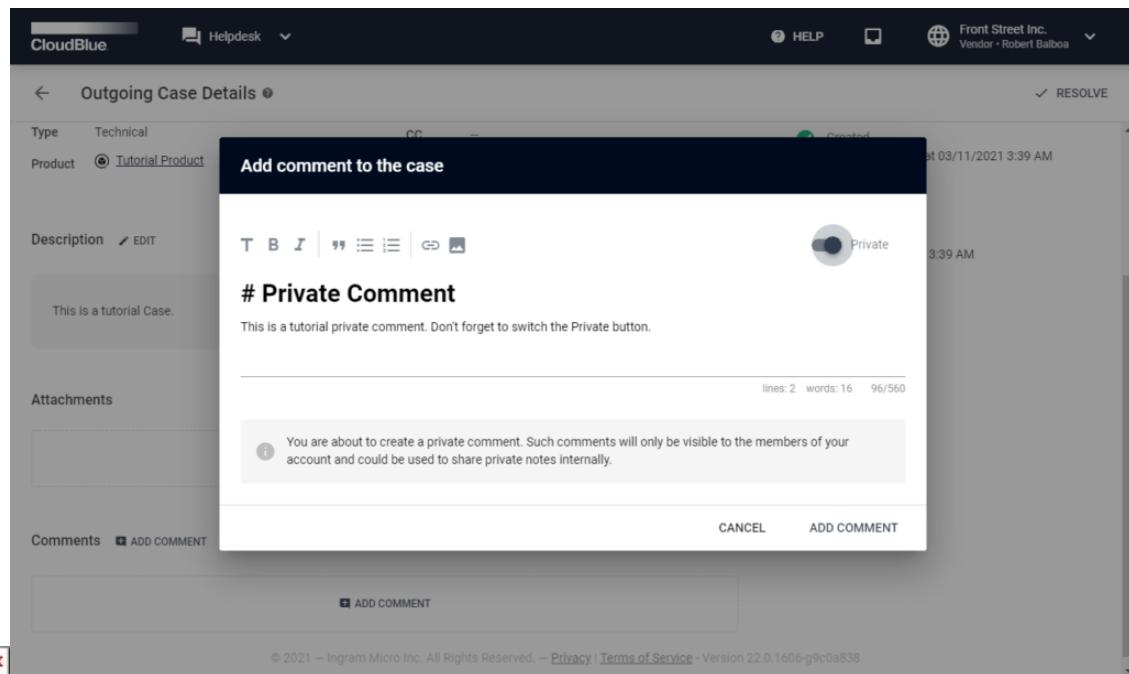


Advice

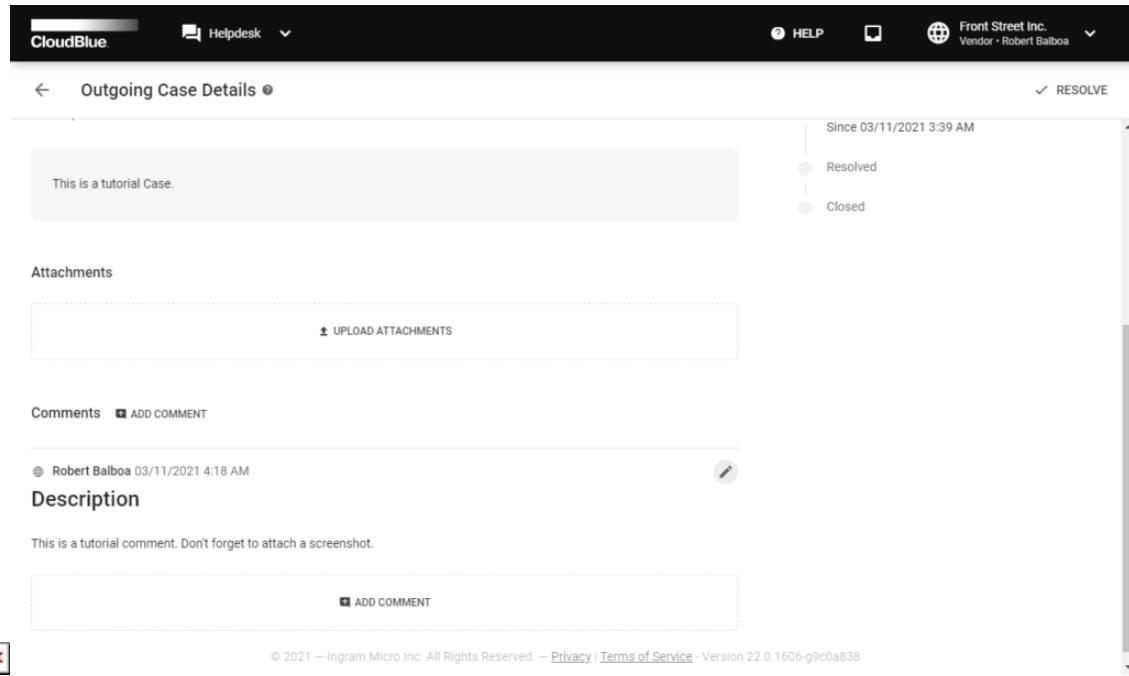
Use corresponding buttons on the user interface to edit your text (create headings, quotes, etc.), insert links, or attach images. Furthermore, it is recommended to submit a message with less than 560 symbols.



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.

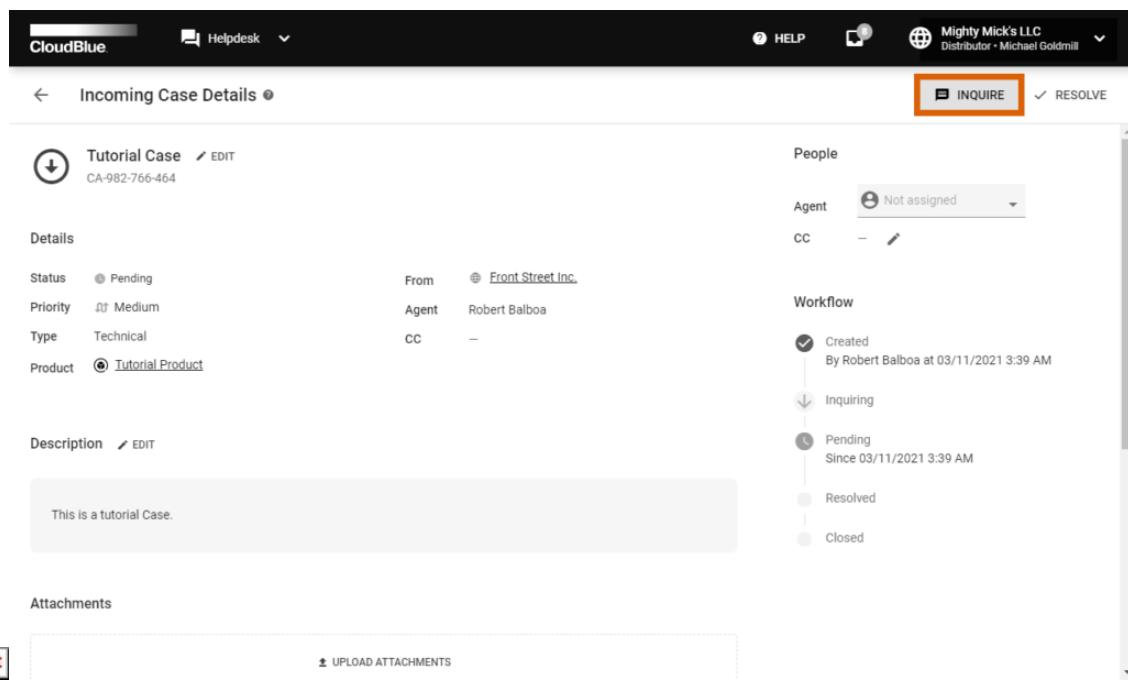
Inquiring data

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



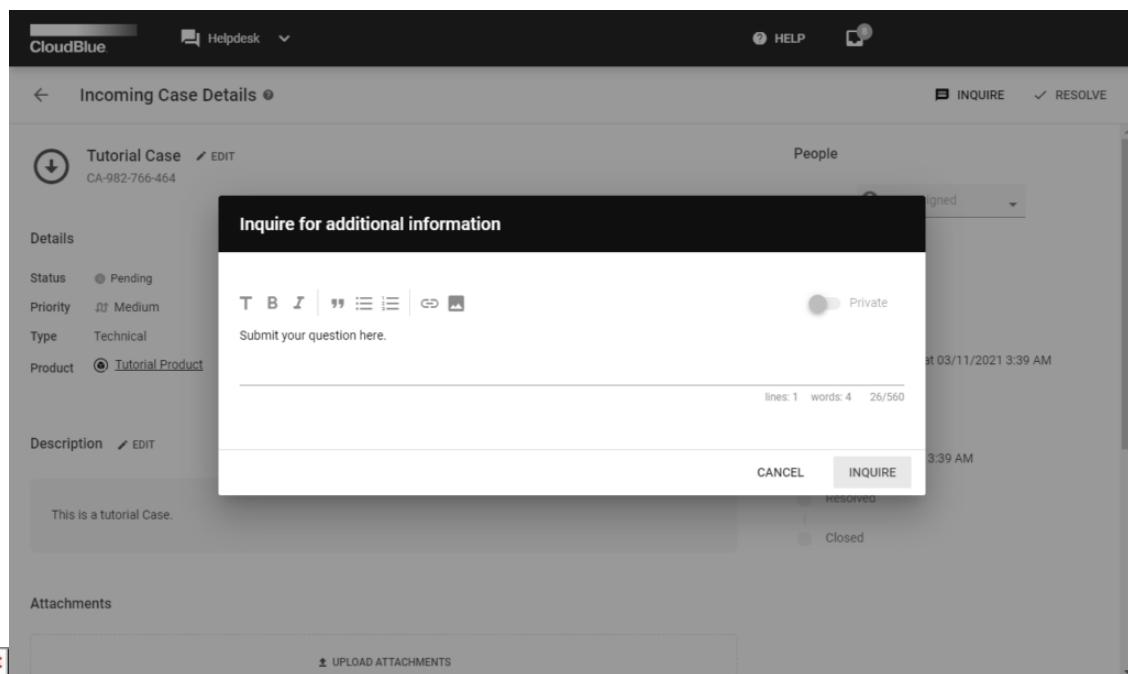
The following steps showcase how to inquire more information and how to transfer your Case to the *Inquiring* state

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



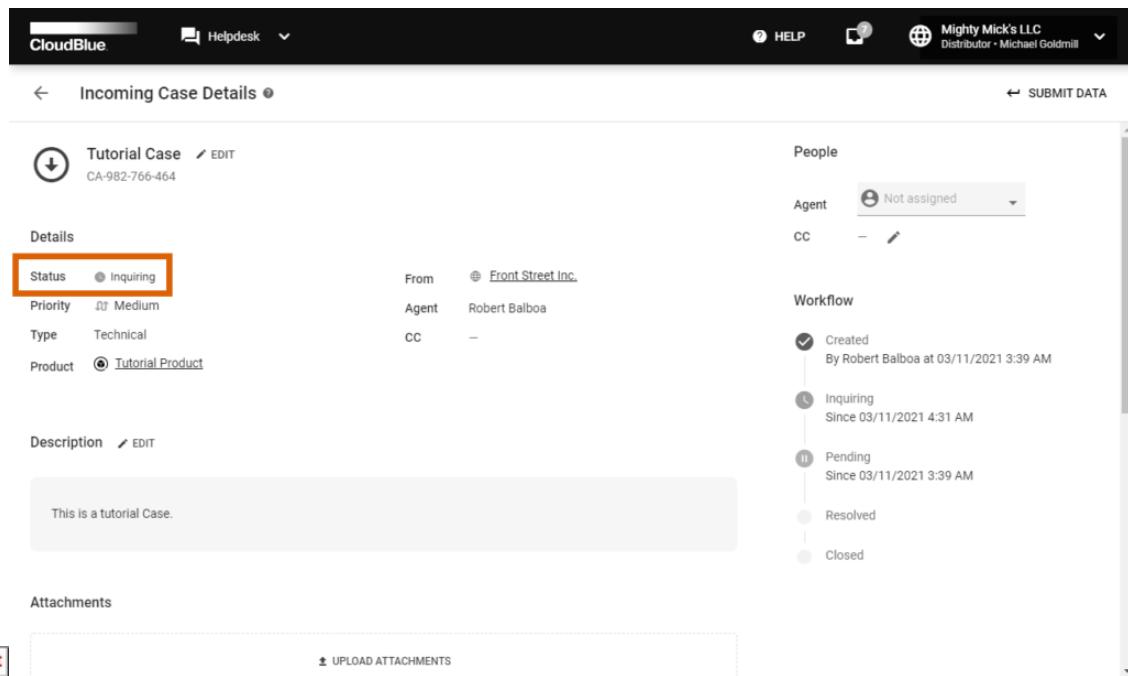
This screenshot shows the 'Incoming Case Details' page for a case titled 'Tutorial Case' (ID: CA-982-766-464). The 'INQUIRE' button is highlighted with a red box. The page displays case details, a description (containing 'This is a tutorial Case.'), and a workflow section with states: Created, Inquiring, Pending, Resolved, and Closed.

2. Add a comment into the following Inquire form.



This screenshot shows the 'Incoming Case Details' page with an 'Inquire for additional information' modal open. The modal contains a text area with a WYSIWYG editor toolbar and a placeholder 'Submit your question here.' The modal also includes a 'Private' toggle, a timestamp '03/11/2021 3:39 AM', and buttons for 'CANCEL' and 'INQUIRE'.

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



CloudBlue Helpdesk

Incoming Case Details

Tutorial Case CA-982-766-464

Details

Status	<input checked="" type="radio"/> Inquiring
Priority	Medium
Type	Technical
Product	<input checked="" type="radio"/> Tutorial Product

From: [Front Street Inc.](#)
Agent: Robert Balboa
CC: —

Description

This is a tutorial Case.

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

Attachments

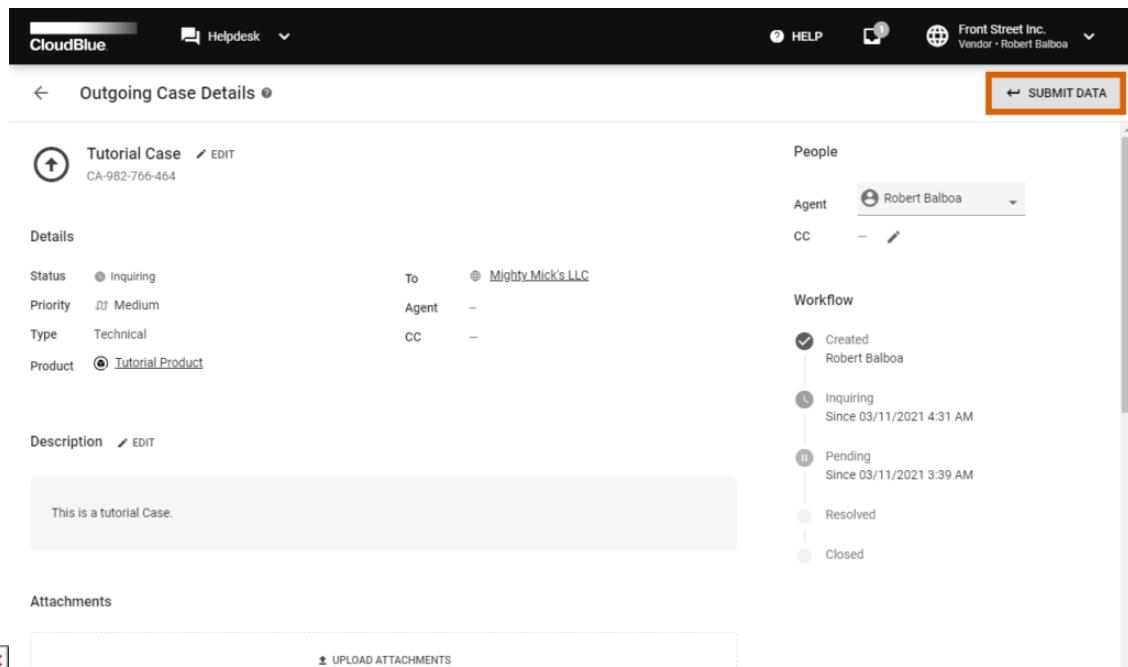
 [UPLOAD ATTACHMENTS](#)

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

Outgoing Case Details

Tutorial Case CA-982-766-464

Details

Status	<input checked="" type="radio"/> Inquiring
Priority	Medium
Type	Technical
Product	<input checked="" type="radio"/> Tutorial Product

To: [Mighty Mick's LLC](#)
Agent: —
CC: —

Description

This is a tutorial Case.

People

Agent: Robert Balboa
CC: —

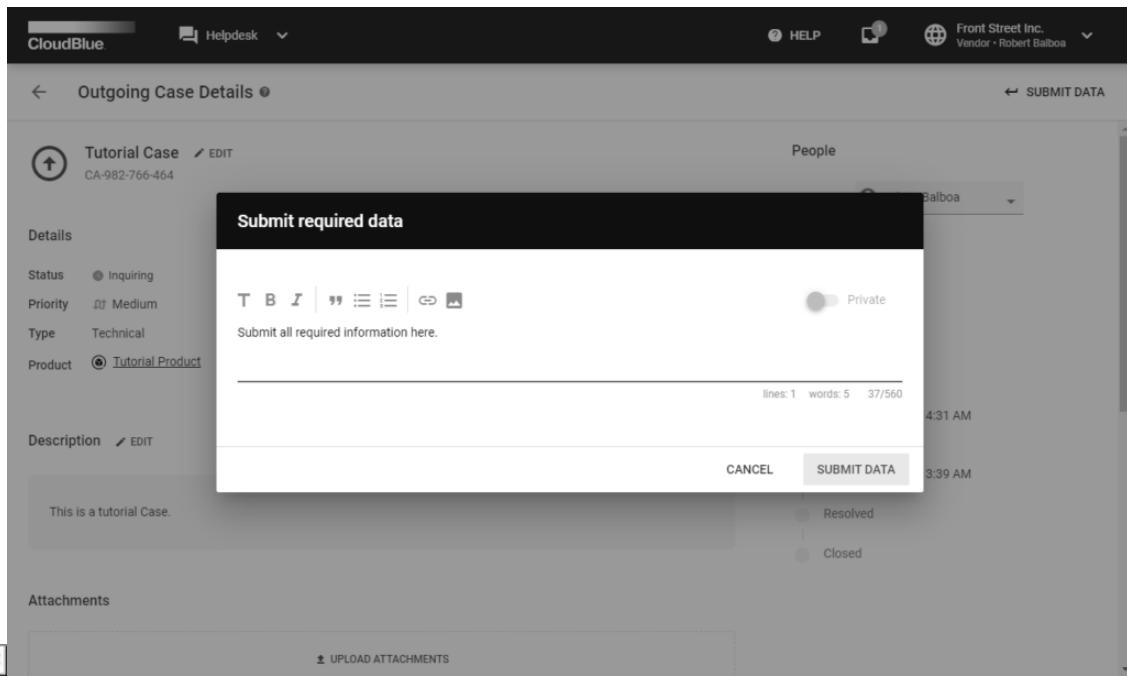
Workflow

- Created: Robert Balboa
- Inquiring: Since 03/11/2021 4:31 AM
- Pending: Since 03/11/2021 3:39 AM
- Resolved
- Closed

Attachments

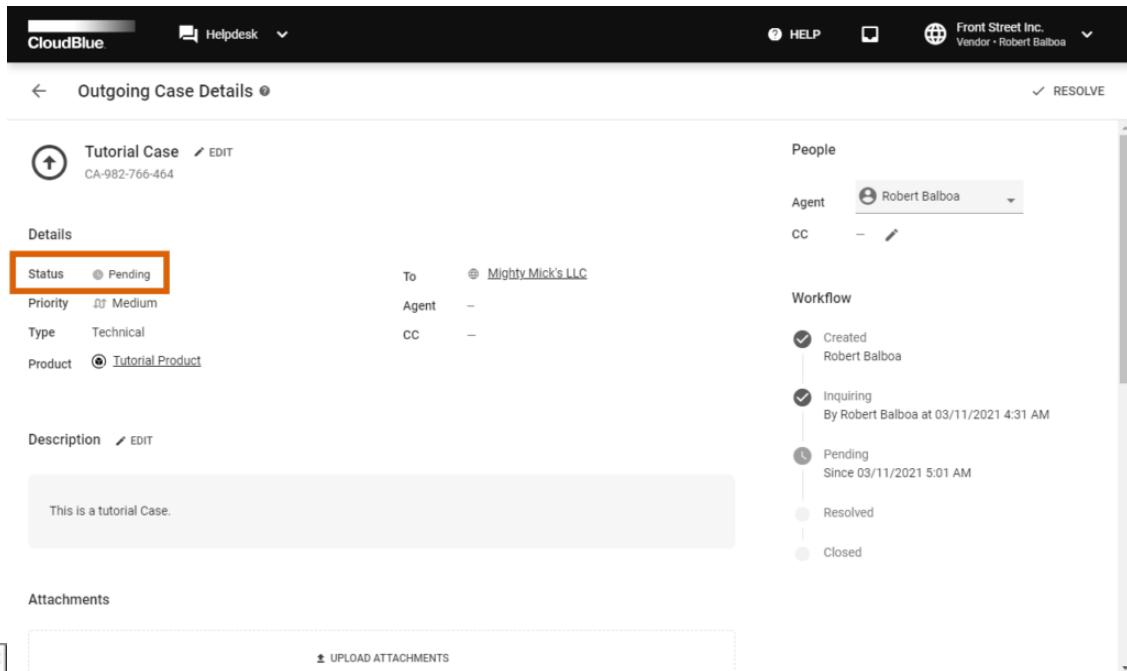
 [UPLOAD ATTACHMENTS](#)

2. Provide required information into the following form.



The screenshot shows the 'Outgoing Case Details' form for a case titled 'Tutorial Case' (CA-982-766-464). The 'Details' section includes fields for Status (Inquiring), Priority (Medium), Type (Technical), and Product (Tutorial Product). The 'Description' section contains the text 'This is a tutorial Case.' The 'Attachments' section has a 'UPLOAD ATTACHMENTS' button. A modal window titled 'Submit required data' is open, containing a rich text editor with toolbar icons (T, B, I, etc.) and a text area with placeholder 'Submit all required information here.' Below the text area are buttons for 'CANCEL' and 'SUBMIT DATA'. To the right of the modal, a 'People' section shows 'Agent: Robert Balboa' and a 'Workflow' section with a history of case status changes: Created (Robert Balboa), Inquiring (By Robert Balboa at 03/11/2021 4:31 AM), Pending (Since 03/11/2021 5:01 AM), Resolved, and Closed.

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' form for the same case. The 'Status' field is now set to 'Pending' (highlighted with a red box). The 'People' section shows 'Agent: Robert Balboa'. The 'Workflow' section shows the history: Created (Robert Balboa), Inquiring (By Robert Balboa at 03/11/2021 4:31 AM), Pending (Since 03/11/2021 5:01 AM), Resolved, and Closed. The rest of the form fields and sections are identical to the previous screenshot.

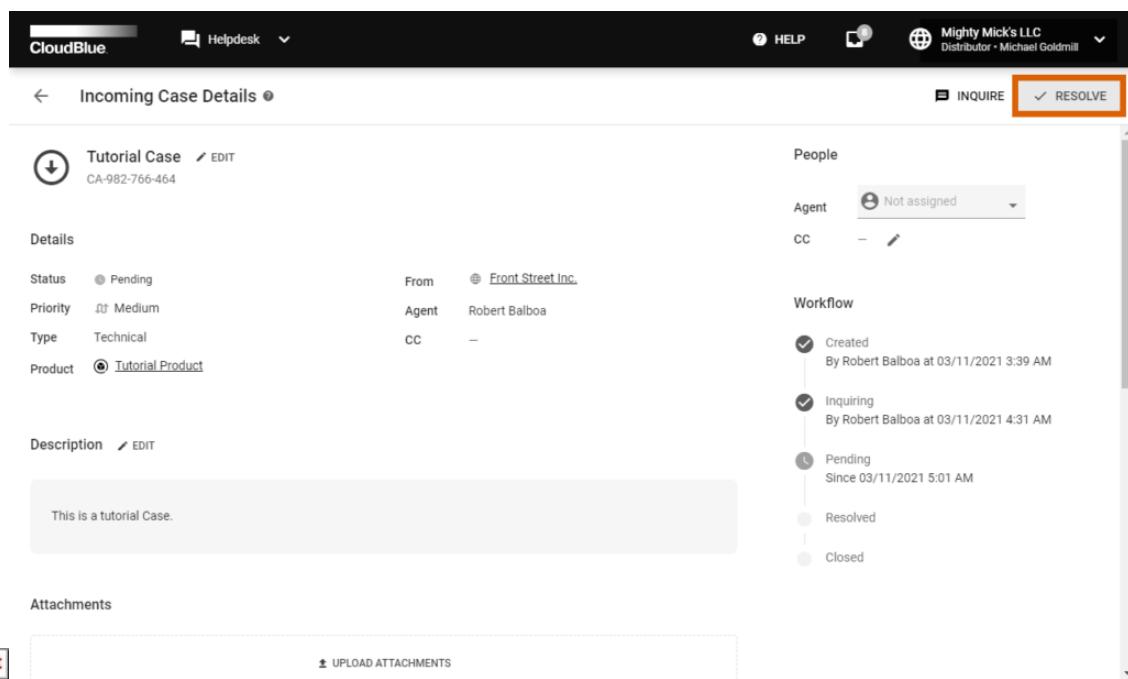
Therefore, your required data will be submitted and the case will be successfully updated.



Resolving Cases

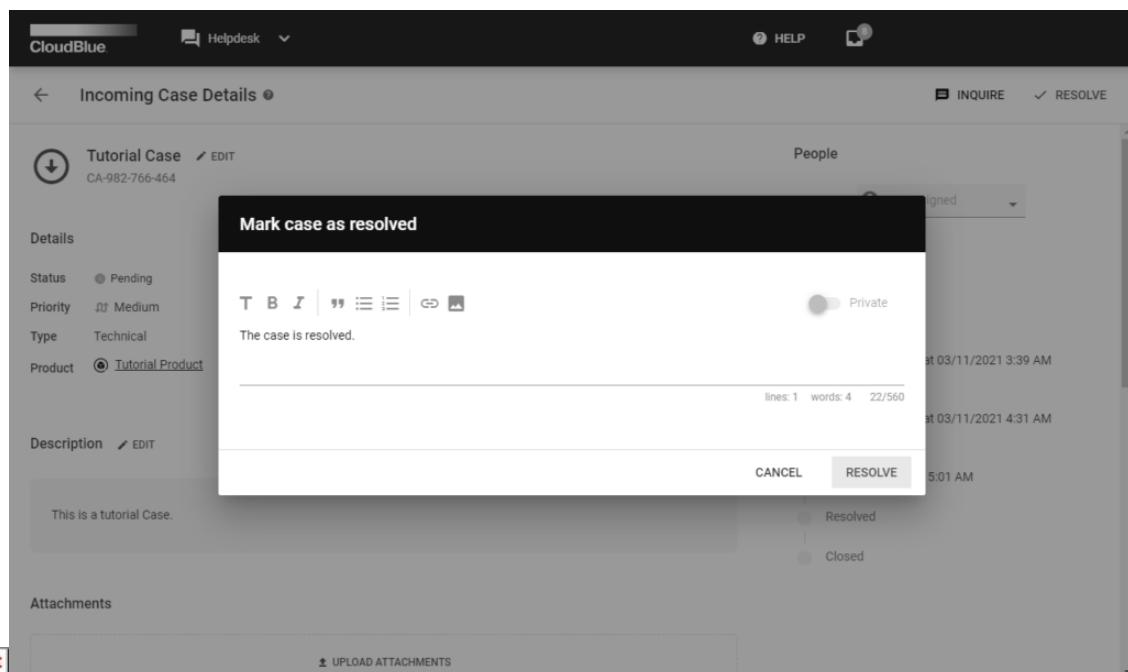
Once your problem or issue is solved, mark your Incoming or Outgoing Case as **Resolved** from the **Case details** screen. Follow the steps below to successfully resolve a Case.

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



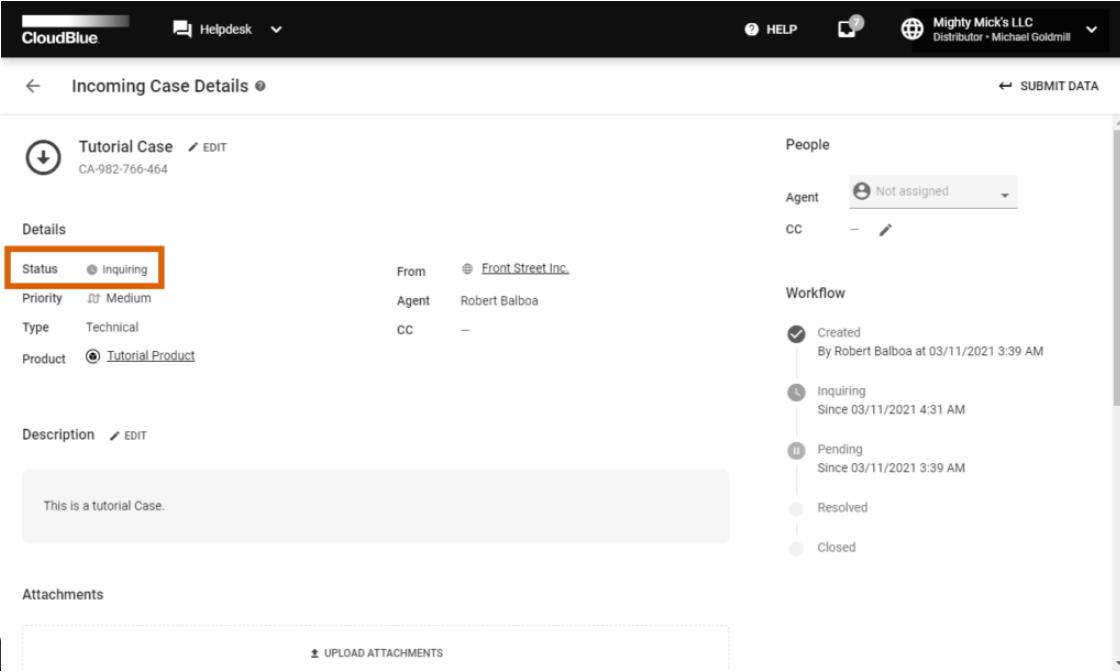
The screenshot shows the 'Incoming Case Details' screen for a case titled 'Tutorial Case'. The 'Resolve' button in the top right corner is highlighted with a red box. The case details include: Status: Pending; Priority: Medium; Type: Technical; Product: Tutorial Product. The 'Description' section contains the text: 'This is a tutorial Case.' The 'Workflow' section shows the case's history: Created, Inquiring, Pending, Resolved, and Closed. The 'Attachments' section has a 'UPLOAD ATTACHMENTS' button.

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



The screenshot shows the 'Incoming Case Details' screen with a 'Mark case as resolved' modal open. The modal contains a rich text editor with a toolbar (T, B, I, etc.) and a message: 'The case is resolved.' Below the message is a 'Private' toggle switch. At the bottom of the modal are 'CANCEL' and 'RESOLVE' buttons. The background shows the same case details and workflow history as the previous screenshot.

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



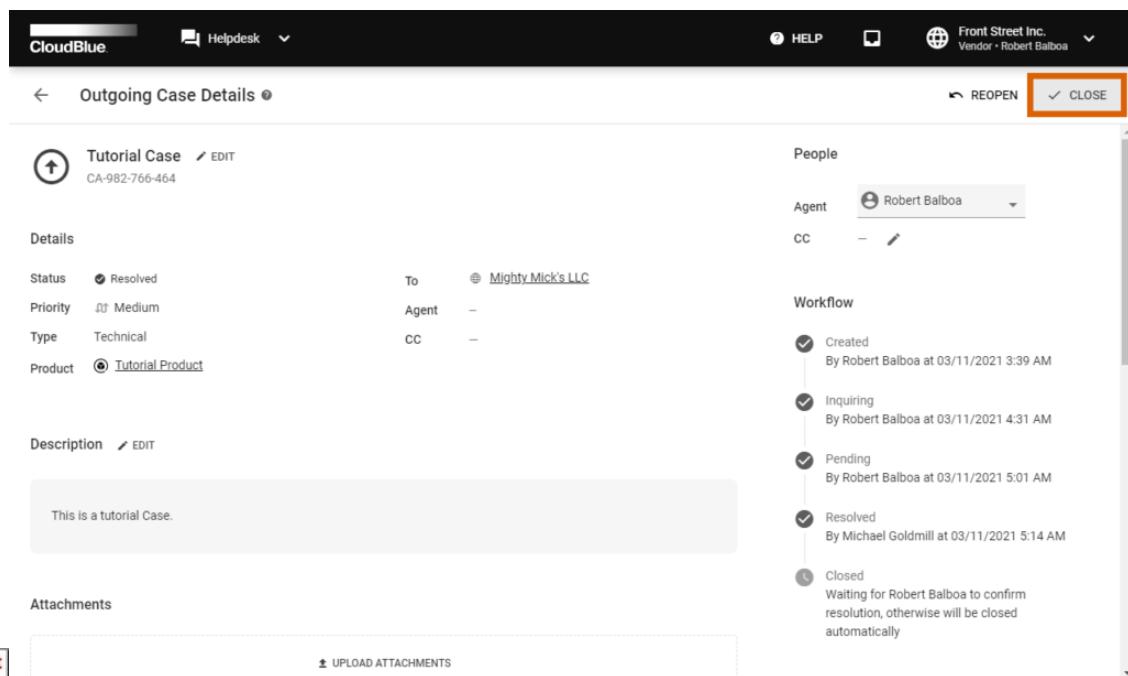
The screenshot shows the 'Incoming Case Details' screen in the CloudBlue Helpdesk. The case is titled 'Tutorial Case' with ID 'CA-982-766-464'. The 'Status' field is set to 'Inquiring' (highlighted with a red box). The 'Workflow' section shows a history of states: 'Created' (checked), 'Inquiring' (since 03/11/2021 4:31 AM), 'Pending' (since 03/11/2021 3:39 AM), 'Resolved', and 'Closed'. The 'Attachments' section has a '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.

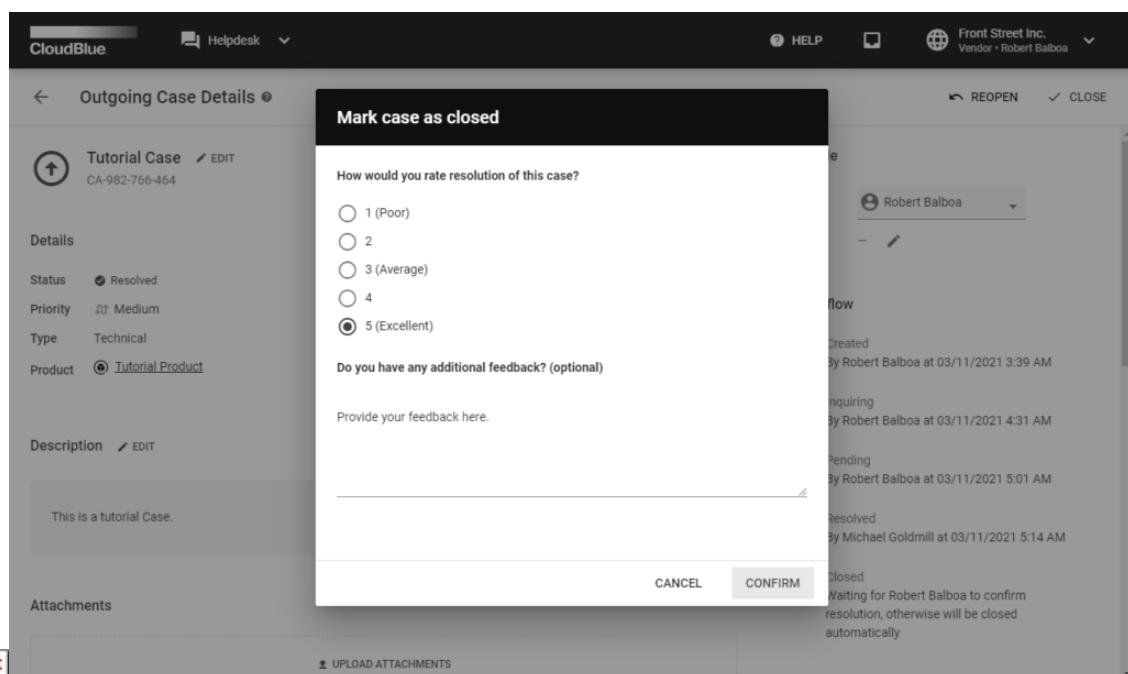


The screenshot shows the 'Outgoing Case Details' screen for a case titled 'Tutorial Case' (ID: CA-982-766-464). The 'Details' section shows the case is 'Resolved'. The 'Description' section contains the text 'This is a tutorial Case.' The 'People' section shows the 'Agent' as 'Robert Balboa'. The 'Workflow' section lists the following history:

- 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)

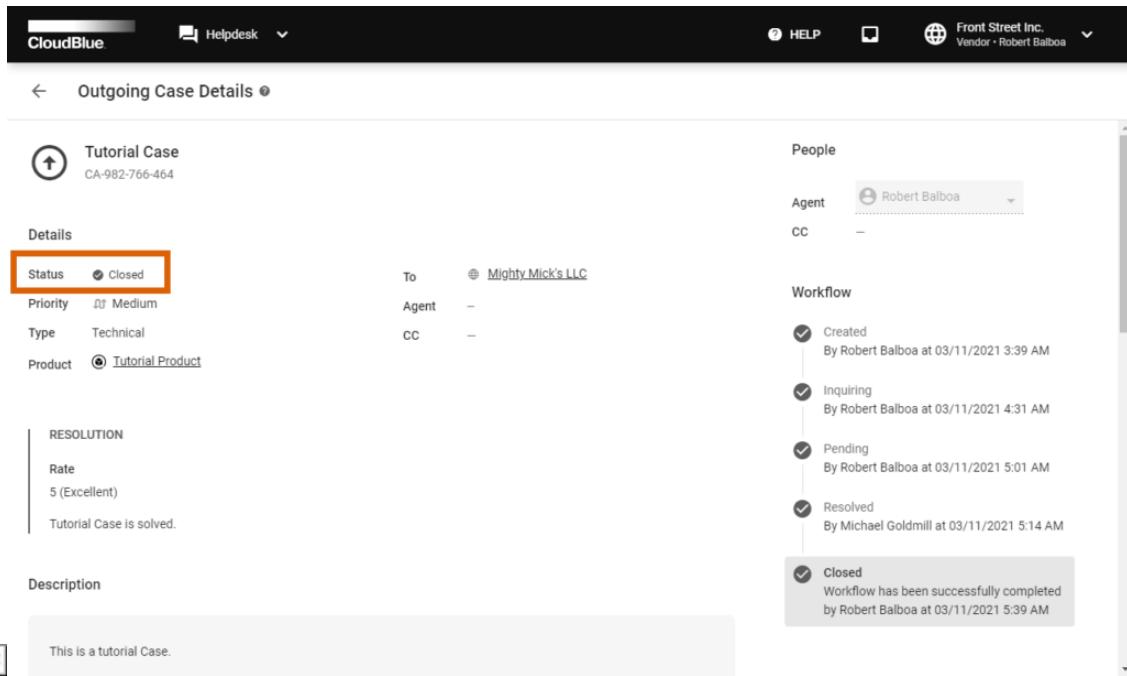
2. Fill out the following **optional** form:

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



The screenshot shows a modal dialog box titled 'Mark case as closed'. It contains a question 'How would you rate resolution of this case?' with five radio buttons labeled 1 (Poor) through 5 (Excellent), where 5 is selected. Below this is a question 'Do you have any additional feedback? (optional)' with a text input field containing the placeholder 'Provide your feedback here.' At the bottom of the dialog are 'CANCEL' and 'CONFIRM' buttons, with 'CONFIRM' being highlighted.

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.



The screenshot shows the 'Outgoing Case Details' page for a case titled 'Tutorial Case' (CA-982-766-464). The status is 'Closed'. The 'Details' section includes fields for Priority (Medium), Type (Technical), and Product (Tutorial Product). The 'RESOLUTION' section shows a rate of 5 (Excellent) and notes that the Tutorial Case is solved. The 'People' section shows the agent as Robert Balboa. The 'Workflow' section lists the following steps: 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), and Closed (by Robert Balboa at 03/11/2021 5:39 AM). A note in the 'Description' section states: 'This is a tutorial Case.'

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.