

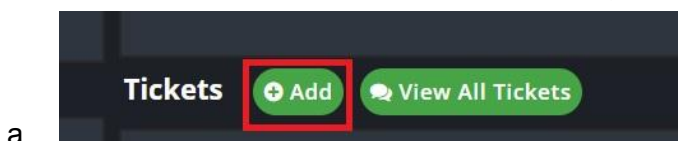
Ticketing Processes

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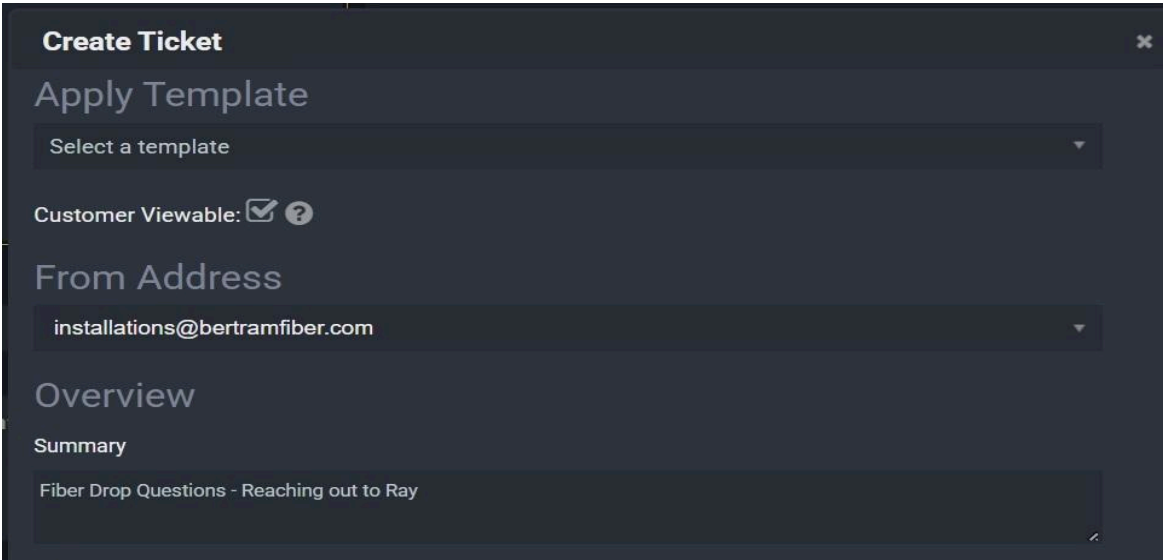
Purpose: The purpose of this document is to provide a clear overview of the ticketing process. Tickets are intended for customer interactions that require follow-up or need more details than a simple call log can accommodate. This guide will walk users through the entire process, explaining how to effectively use the ticket interface. Additionally, it will include tips and best practices to help users maximize the functionality of the interface.

1. On the overview screen of the customer's account, click the "Add" button next to tickets.



2. You can leave the template section as is. If you plan to email the customer from the ticket, be sure to check the "Customer Viewable" option. When you select this option, you will need to choose the email address from which you will send the correspondence about the ticket; typically, you should select fiber@bertramfiber.com

Please note that enabling "Customer Viewable" allows the customer to see all notes added to the ticket, including the summary and problem description. Therefore, it is essential to maintain a professional tone in all ticket entries. Afterward, you will need to enter a summary of the ticket and complete your notes. You can also add a file attachment. Once you have entered the information click "Next"

a. 

Problem

Barbara (920-555-5555) is asking about what kind of conduit would be necessary for them to use in order to run their own conduit the 600 feet from the right of way to their house in Baileys Harbor. Reaching out to Ray about the specifications and will respond back.

Attachments
Max File Size: 50M Current size: 0

Choose Files No file chosen

Next

b.

- You can select a "User" and a "Group" to assign a ticket. Instead of assigning the ticket to a specific user, it's usually better to assign it to a "Group," in this case, 5Star. This way, multiple people can review the ticket. Next, choose a Category, specifically "Fiber 5Star." You can leave the "Type" field as is.

We have created the 5Star Group and Categories specifically for 5Star. However, if you are creating a ticket about an issue such as fiber pricing or RoE signatures, which are Bertram's responsibilities, you may want to change the Group and Category to a different option, like Sales.

If you create a ticket that doesn't require follow-up, you can click "Resolve Ticket," which will immediately resolve the ticket upon creation. Once you have selected the appropriate options, click "Submit Ticket."

Responsibilities

User
Select an Option

Group
5Star

Classification

Category
1 - Fiber 5Star

Type
Select an Option

☐ Urgent? Follow Up:

☐ Close Ticket
☐ Resolve Ticket

Back **Submit Ticket**

a.

4. You will be taken back to the account Overview screen, where you will see the new ticket. Tickets are color-coded based on their status.
- "Red" indicates that someone needs to be actively working on the ticket.
 - "Yellow indicates that we are waiting for a response from the customer."
 - Green is Resolved which after 7 days will transition to ...
 - Closed which has no highlighted color.

e.

Tickets						
236244	Active	1	Fiber Drop Questions - Reach...		1 - Fiber 5Star	Apr 17, 2025
236237	Resolved	1	Escalated Call: Test	Generic	Miscellaneous	Apr 17, 2025


5. To update a ticket, click on the ticket number on the left side. You will then see the ticket's history along with options at the top.

a.

ACTIVE **REPLY** **COMMENT** **TRANSFER** **ACTIONS** **WATCHERS** **HISTORY** **FILES 0**

ID: **236244** RELATION: **Baileys Harbor Fiber Training Account (70768)** ASSOCIATED EMAIL: **support@gobertram.com**
AGENT: CUSTOMER VIEWABLE: **Yes** IDLE / DURATION: **0h 1m / 0**

Fiber Drop Questions - Reaching out to Ray
1 - FIBER 5STAR /



Message Received From Customer
Apr 17th 25 2:41:01pm sales@gobertram.com

Ticket Opened
Apr 17th 25 2:37:11pm bwilkinson

Barbara (920-555-5555) is asking about what kind of conduit would be necessary for them to use in order to run their own

- b. The upper left corner indicates the status of the ticket. By clicking the second option, you can either “Reply” to the ticket (which sends an email to the customer) or “Update” the ticket. This choice depends on whether the ticket is viewable by the customer. Update does NOT send the customer an email response.

When you use the Reply option, the email will be sent from the address selected in the drop-down menu. When responding you have the option to set the ticket status as “Active,” “Waiting,” or “Resolved.” which will take effect after you click the “Post Reply” button. Please note that these email responses may sometimes end up in the customer's spam folder.

ACTIVE REPLY COMMENT TRANSFER ACTIONS WATCHERS HISTORY FILES 0

Reply **Select whichever status you want the ticket to be after you have sent the email**

Set Ticket Status: ACTIVE WAITING **RESOLVED** CLOSED

From Address:
installations@bertramfiber.com

<> T B / S : ☰ ☷ 🔗

Barb,

If you wish to have someone run your own conduit it would needs to be at least 1" in diameter and must be run from the premise(s) to the ROW. The conduit needs to be either communication orange conduit or grey PVC | You would want to bury it 6" deep at a minimum. If you have any further questions feel free to give us a call at 262-720-1603.

Attachments
Choose Files No file chosen
MAX FILE SIZE: 50M CURRENT SIZE: 0

Re-assign this ticket to yourself? ☒

Post Reply ☐ Take me back to the customer page

- c.
- d. The “Comment” feature allows you to leave comments without directly emailing the customer. These comments will not be visible to the customer but should still remain professional.
- e. “Transfer” would permit you to assign the ticket to a different group such as sales.

- f. The “Actions” option allows you to rename the Ticket Summary, change its status, and update the category of the ticket. You can also uncheck the “Customer Viewable” toggle to prevent them from being able to see the ticket and they will not get emails. Click “Save” after making changes.

REPLY COMMENT TRANSFER ACTIONS WATCHERS HISTORY FILES

3624 Summary

UPDATED TITLE: Fiber Drop Questions - Reaching out to Ray

Status: Active

Follow Up

☐ Urgent?

Category: 1 - Fiber 5Star

Type: Select an Option

Parent Ticket: none

Associated Customer: Baileys Harbor Fiber Training Account

Associated Contact: None

Customer Viewable: ☒ ?

Create scheduled job from ticket

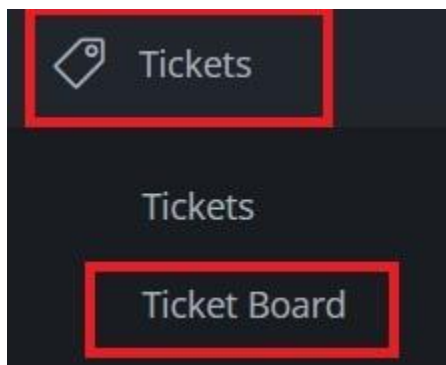
Save

g.

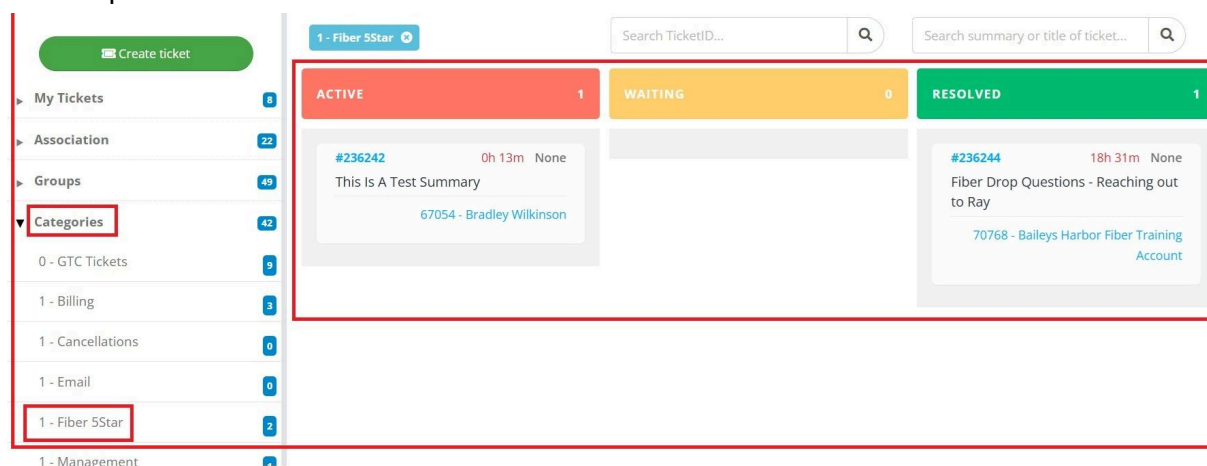
h. Other options are not regularly used.

6. Tickets can also be automatically generated by the customer sending an email to one of our managed email addresses such as fiber@bertramfiber.com. If the email they are sending from is associated with an account the ticket will also show up associated with their account. If not, it will create an unassociated ticket.

7. There is also a Ticket Board where you can see all Active, Waiting and Resolved tickets by clicking Tickets -> Ticket Board.



- a.
- b. It will initially show all tickets but you can narrow it down to just the 5 Star tickets by clicking the arrow next to Categories and then selecting 1 - Fiber 5Star. This will filter to just the tickets that are assigned to 5Star. The tickets on the left (under Active) should be high priority, followed by Waiting (which should generally be followed up on if it has been a few days since they were last interacted with). Resolved tickets will be on the right. You can click on any ticket number to look at and update the ticket.



c.