Digital Kft. Helpdesk User Manual

Introduction

Welcome to the DIGITAL KFT. Helpdesk System User Manual!

The purpose of this manual is to help you effectively and easily use our helpdesk system, through which you can report and track your issues. The unified platform provided by the helpdesk system allows you to communicate with us easily, resolve your issues quickly and efficiently, and streamline the billing process. Through this platform, you will be able to create new tickets, track their status, and communicate efficiently with our support team. The manual provides detailed guidance on the basic functionalities and processes to assist you in effectively using the system. We hope this manual will help you in smooth workflow and simplified communication.

System Overview

The Digital Helpdesk is a web application designed to manage the issue reports received by Digital Kft, accessible at https://helpdesk.digital.co.hu. This chapter provides a comprehensive overview of the main features and functions of the helpdesk system. In this chapter, we introduce the user interface of the system and the available functionalities. The overview chapter will help you navigate the system and become familiar with its basic elements.

User Interface and Login

Login

To log in, you need to enter the email address and password provided during registration, then click the "Log In" button. Here, you have the option to choose between English and Hungarian languages, and if you have forgotten your password, you can request a new one by clicking the "Forgot your password?" link.

Invitation Email and Admin-Initiated Joining

Sometimes, joining the Digital Kft. Helpdesk System is initiated by an administrator. In such cases, the user receives an invitation email containing the necessary steps to join the system. This invitation email includes a unique link that allows the user to complete the registration process and set up their account.

Administrators can pre-configure user permissions and roles, making the onboarding process quick and seamless. When a user receives the invitation, it is important to follow the instructions provided to complete the registration and gain access to the system.

The invitation email ensures that the user can access the system, and administrators can pre-configure the necessary settings and permissions, allowing users to immediately start working within the helpdesk system.

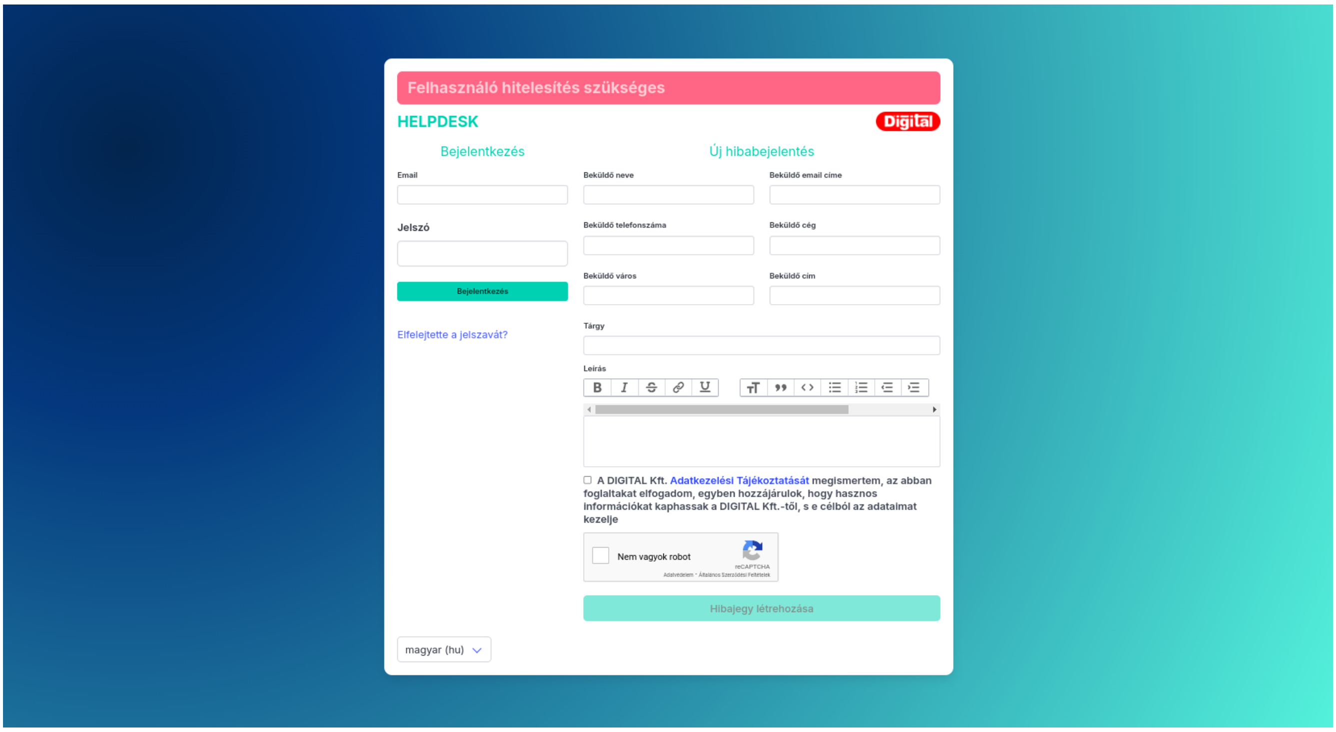

Figure 1. Login

Multi-Factor Authentication (MFA)

The Digital Kft. Helpdesk System supports multi-factor authentication (MFA), providing an additional layer of security to protect user accounts. MFA can be enabled by the user in the account settings.

To use MFA, a device running the Google Authenticator app is required, which allows for the generation of one-time codes during login. Once enabled, the user can only log in to the system using MFA, thereby enhancing security.

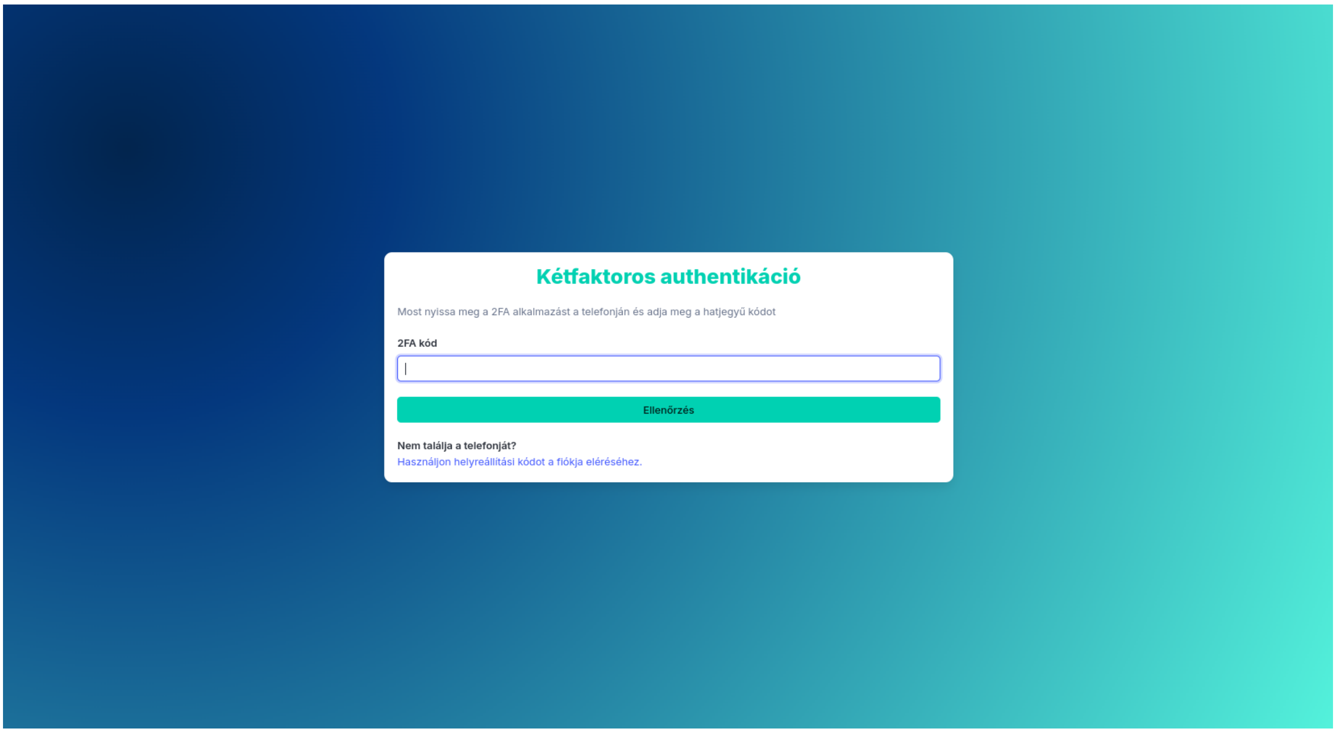

Figure 2. MFA

The activation of MFA can also be set with a time delay. In this case, either the user or the administrator determines the start time for activation. A notification will appear on the user interface, informing the user about the need to set up MFA and the expected activation time. If necessary, the user can disable MFA that they have set up themselves.

Administrators have the option to enforce the use of MFA. With administrative privileges, MFA activation can be made mandatory for both users and clients. This ensures that account access is more secure and protected against unauthorized access.

Dashboard

Under the "Dashboard" menu, you can see the statistics and status of the tickets that concern you. By default, after logging in, this page is displayed, allowing you to review the tickets sorted by status and priority. At the bottom of the page, you can see a table of the most recent open tickets affecting you, sorted by priority and status.

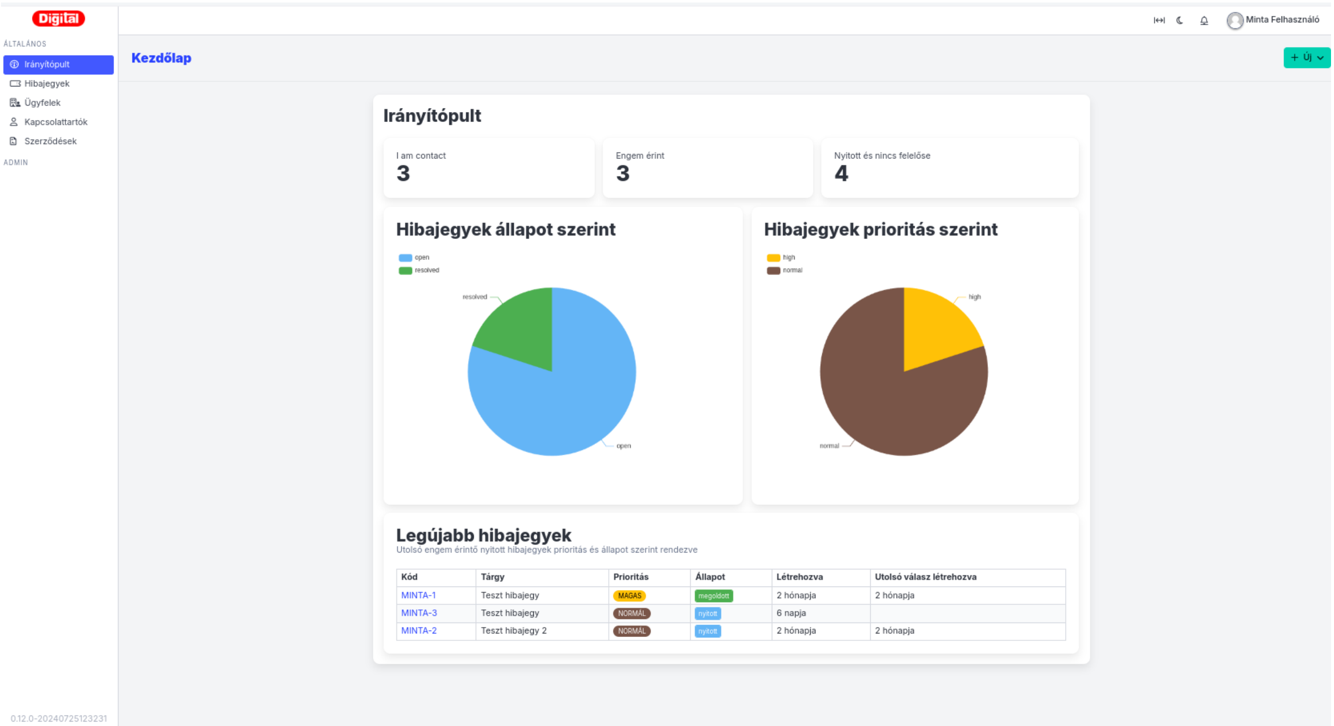

Figure 3. Dashboard

Under the "Tickets" menu, you can view the tickets you have created or that concern you. On the right side of the interface, there is a search tool that allows you to narrow down the results by specifying different filter criteria.

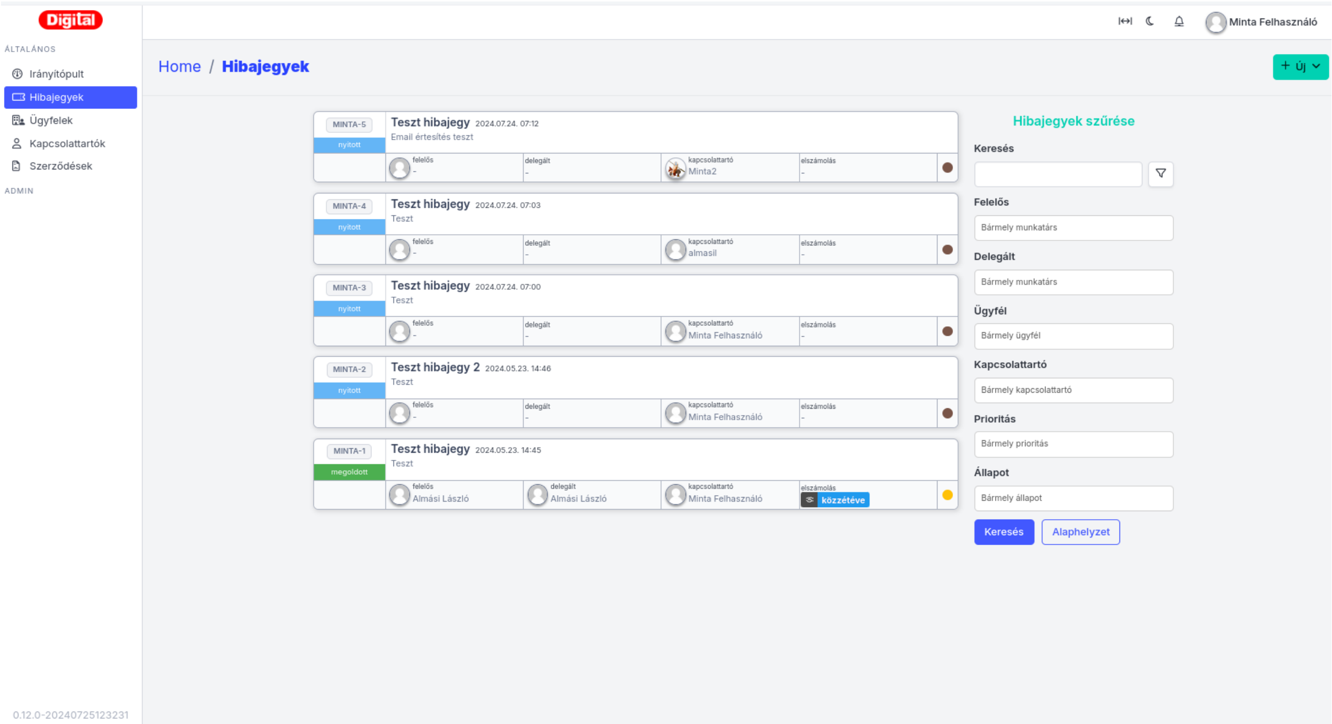

Figure 4. User Interface

Overview of Main Features and Options

User Roles

There are three main types of users:

- "Anonymous" (not authenticated) reporter
- Contract customer with a user account
- Digital Ltd. employee (agent, staff)

The "anonymous" reporter can use the public reporting form and access the created ticket using a unique URL. In contrast, other users access the system by logging in with their email and password.

Customers and staff are assigned roles that determine what they can see and do within the system. There are four roles for both customers and staff:

- Admin: Can do everything (e.g., manage users) within their customer group.
- Manager: Can view and modify all tickets within their customer group.
- Senior Staff: Has the same capabilities as staff but can also see billing amounts.
- Staff: Can view all tickets within their customer group but can only modify and comment on those assigned to them. Cannot see billing amounts.

Creating a Ticket

This chapter explains in detail how to create a ticket in our helpdesk system. This process allows you to notify us about any problem or question. With our system, you can easily record and track issues, enabling our support team to respond quickly and effectively.

It’s very important to fill out each ticket accurately and in detail, as the information provided helps us start working on the issue and is essential for future billing. The data you enter in the ticket helps us identify the problem quickly and find an effective solution.

This chapter provides a step-by-step guide for creating a ticket and helps you understand how to use the system efficiently in your daily work.

Step-by-Step Guide to Creating a Ticket

Creating a New Ticket within the Helpdesk System

To create a new ticket, go to the "Tickets" page and click the green "+ New Ticket" button in the upper right corner.

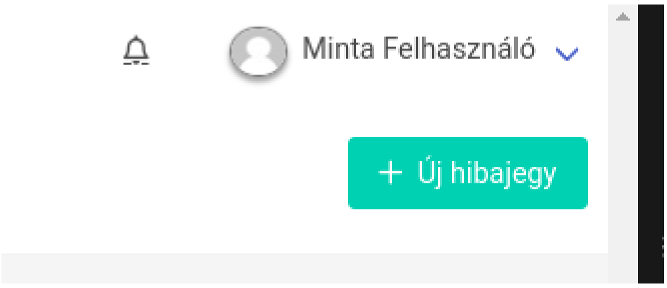

Figure 5. Creating a New Ticket - Step 1

You will need to provide the information required for troubleshooting and billing. First, select the client (by default, the dropdown menu will only offer your own company with normal user permissions), the contact person, and the location. Choose the contract under which you request the issue to be resolved, and if different response levels are available, you can select one now.

Please summarize the problem in the Subject field. You can provide a detailed description of the issue in the "Description" field. If necessary, you can also attach a file to the ticket at this step.

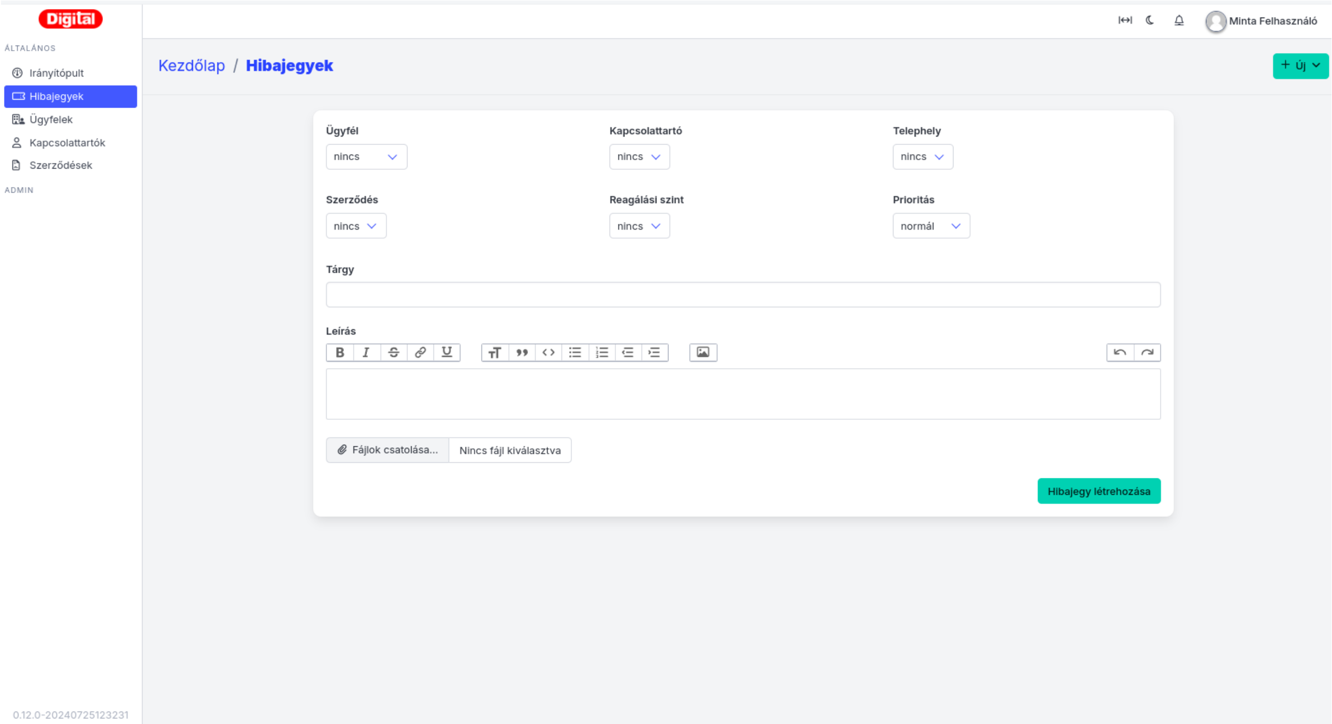

Figure 6. Creating a New Ticket - Step 2

After providing all necessary information for the support team, finalize the submission by clicking the green "Create Ticket" button in the lower right corner.

Creating a New Ticket Outside the Helpdesk System

If you are unable to use the helpdesk system directly, you can report the issue via email at helpdesk@digital.co.hu or using the form available at https://helpdesk.digital.co.hu/. In this case, you must provide contact details in addition to the description of the issue.

It is important to note that if the email domain of the sender matches an existing customer's email domain, the system will automatically assign the created ticket to that customer. The administrator/manager of the customer will be able to view and manage the ticket.

A receipt for the ticket creation will be sent to the provided email address. However, due to privacy reasons, we do not include detailed information about the ticket in the email. Instead, you will receive a "magic link" which you can use to request a PIN code. After authenticating with the PIN code, you can view the ticket, including its information and status changes. Although the PIN code expires, it can be requested again using a valid magic link.

Notifications

Notifications are sent via email whenever a ticket is created or its status changes. By default, the "New Ticket Notification Group" configured in the Customer Settings receives email notifications for new tickets. However, if an additional "New Ticket Notification Group" is set up for the customer, the members of this additional group will receive notifications for tickets submitted by the customer's users, instead of the group specified in the Settings.

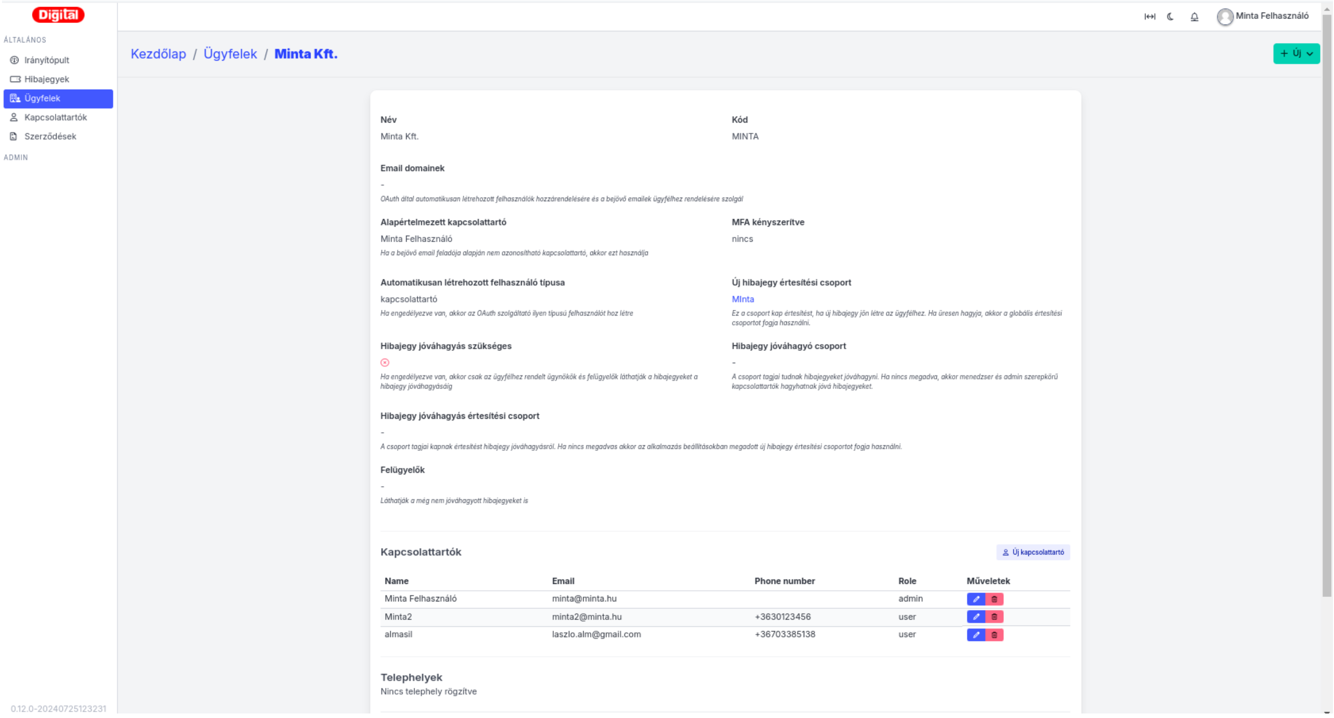

Figure 7. Customer Settings

Required Information and Filling Out Fields

Tickets have the following main properties:

- unique identifier (code): this is a code with sequential numbering unique to each client, consisting of the client's code and a serial number
- subject: the subject of the ticket
- description: the text of the ticket
- assignee: the staff member (agent) assigned to the ticket
- participants: can see the ticket and receive notifications if it changes
- client-side contact: the client's contact person (by default, the submitter)
- priority:
  - low
  - normal
  - high
  - urgent
- status:
  - new
  - in progress
  - awaiting response
  - suspended
  - resolved

- rejected
- closed

- contract: the contract under which the client wants the work billed
- response level: SLA level defined per contract
- billing: items to be billed to the client; a ticket can only be closed with billing information provided
- client response: related status updates, also used to track actual time spent

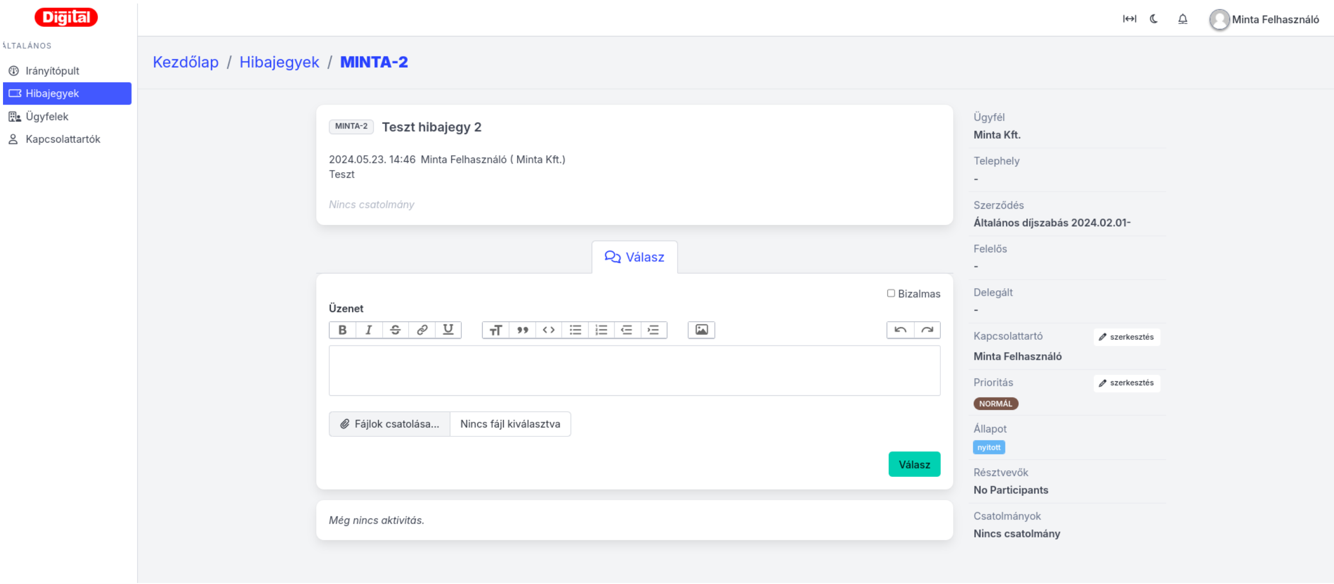

Figure 8. Ticket Properties

On the right side of the screen, you can see which properties of the ticket can be edited, indicated by a small pencil icon and the word "edit". After saving the edits, the ticket will be updated, and a small popup message will notify you of the changes.

In the "response" field of the ticket, you can share information with support, and responses will also be received here. The text entered in this field is also sent via email so that participants are quickly informed of status changes. You can mark messages in this field as "confidential". Confidential messages are not automatically sent via email; instead, they can be viewed securely, with participants notified by email.

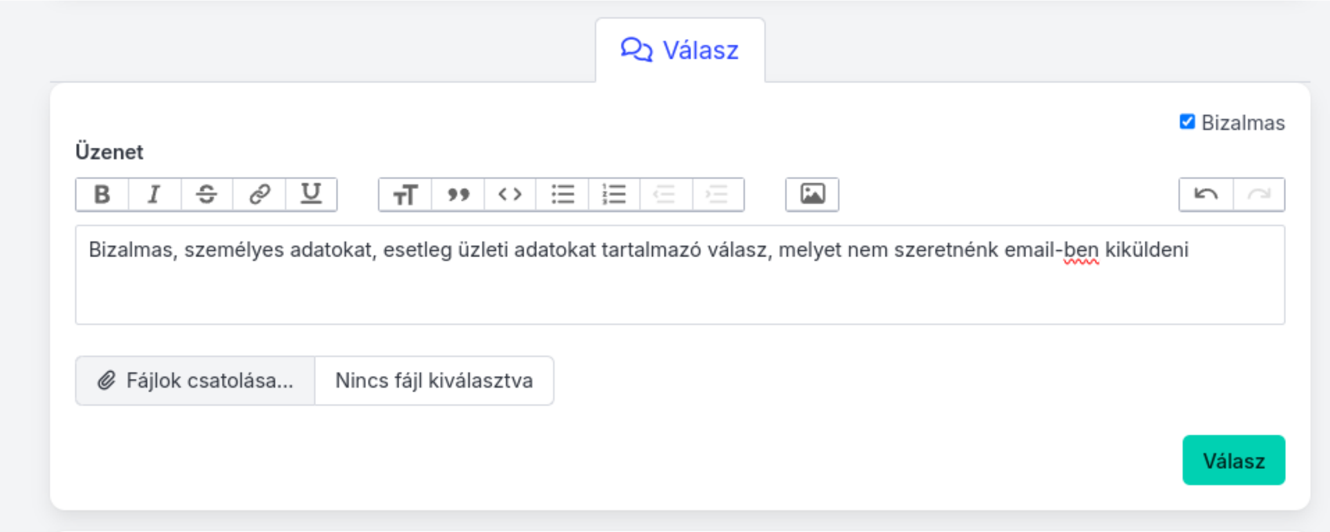

Figure 9. Confidential Response 1

Later, when viewing the ticket, you will see if a response was marked as confidential.

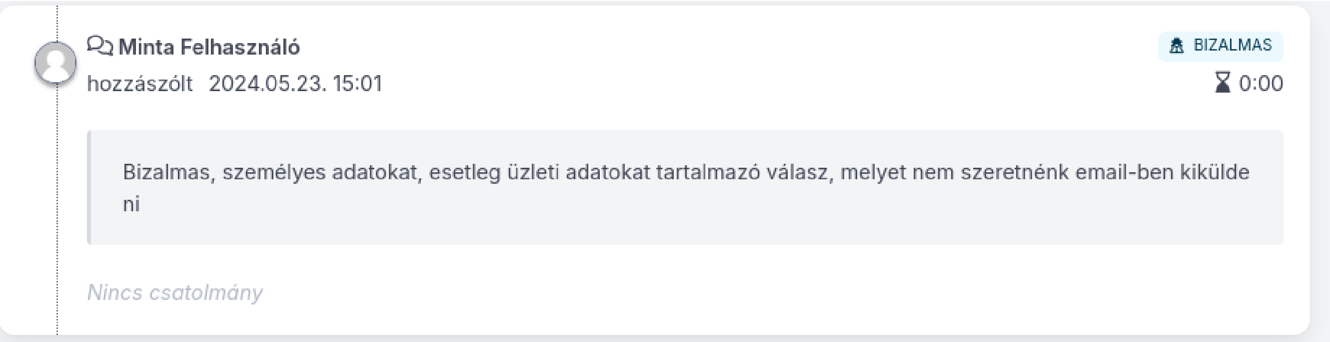

Figure 10. Confidential Response 2

Contract and Response Level

The contract represents the support agreement with the client. It consists of two important parts:

- response levels
- contract lines The response level refers to the SLA requested by the client as defined in the contract.

Contract lines represent billable items specified in the contract (e.g., system engineer hourly rate: … Ft, travel: … Ft/km, etc.). Each contract line is categorized into a contract line category, allowing items to be aggregated across different contracts, as the category defines the unit of measure and currency.

Status and Tracking

Status and Tracking

This chapter helps you understand how to track the status of tickets in the helpdesk system. When you create a ticket, it can go through various statuses such as "Open", "In Progress", "Resolved", and "Closed". These statuses allow you to always know where the problem resolution stands. Tracking statuses is crucial because it lets you see when the support team started working on the issue and when a resolution is expected, keeping you updated on ongoing matters. This chapter details how to check the status of tickets and explains what each status means.

Interpretation of Ticket Statuses

Statuses

A ticket can have the following statuses:

- Open: The support has not yet started working on the ticket.
- In Progress: The issue is currently being addressed.
- Waiting for Response: We are awaiting a response from the customer.
- Suspended: The resolution of the ticket has been temporarily suspended due to external circumstances.
- Resolved: The issue has been resolved, but the customer has not yet approved the associated billing.
- Rejected: The ticket does not require attention (e.g., erroneous report).
- Closed: The issue has been resolved, and the customer has accepted the billing.

The statuses Open, In Progress, Waiting for Response, Suspended, and Rejected can be freely set by the ticket owner. A ticket moves to the Resolved status when the owner attaches a billing to it, and it moves to the Closed status when the customer accepts the billing. A ticket is considered closed if it is in the Rejected or Closed status.

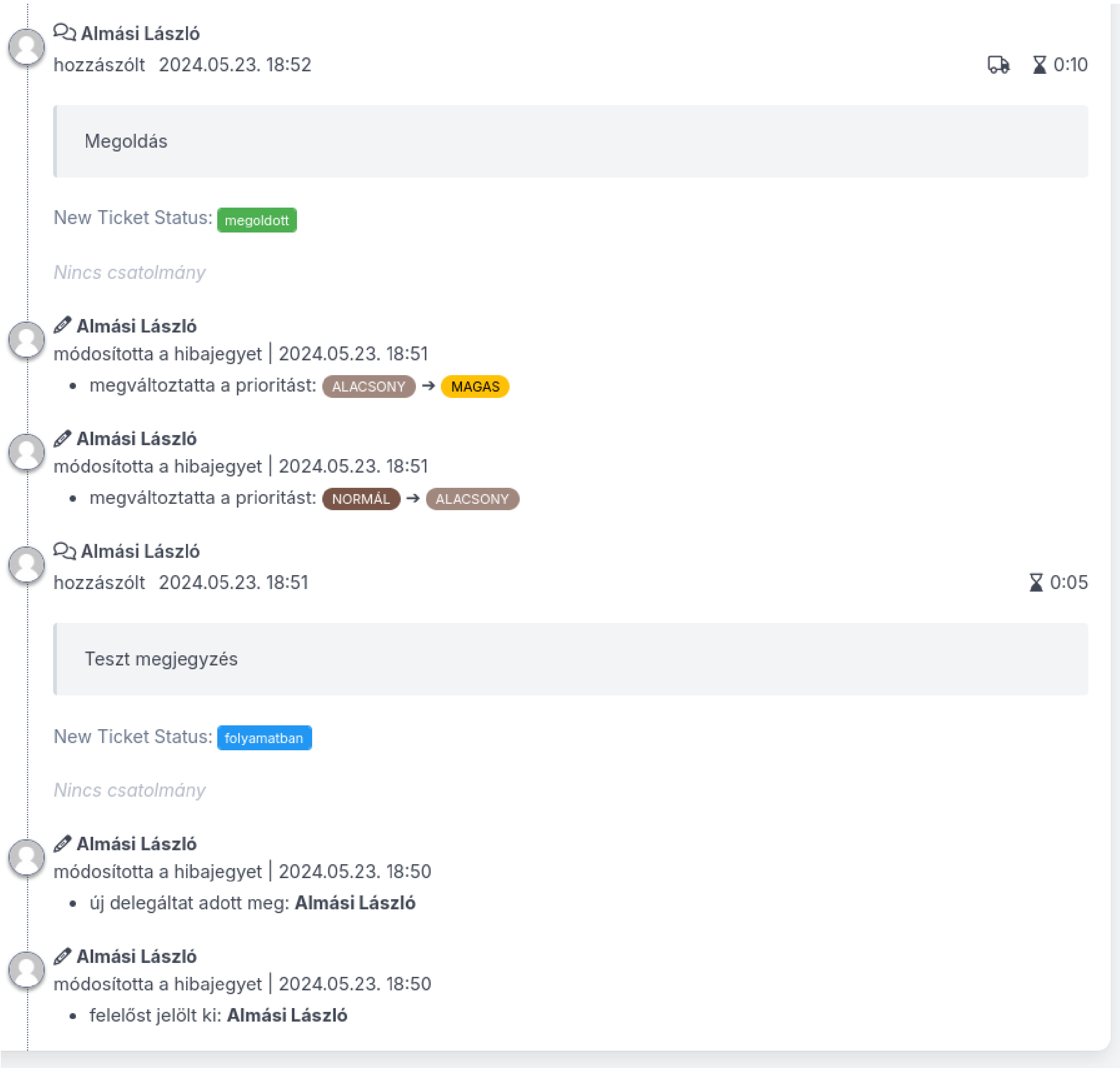

Figure 11. Ticket Status Changes

Changes in priority or status of a ticket are tracked. The authorized users can always see who is handling the task (delegated), who is responsible, and how much time has been spent on the resolution so far. The statuses and priorities of tickets are also marked with color codes, making it easy to distinguish between tickets in different statuses on the homepage.

Priority

There are four priorities in the system based on the urgency of issue resolution:

- Low
- Normal
- High
- Urgent

The priority of a ticket can be modified later in its lifecycle.

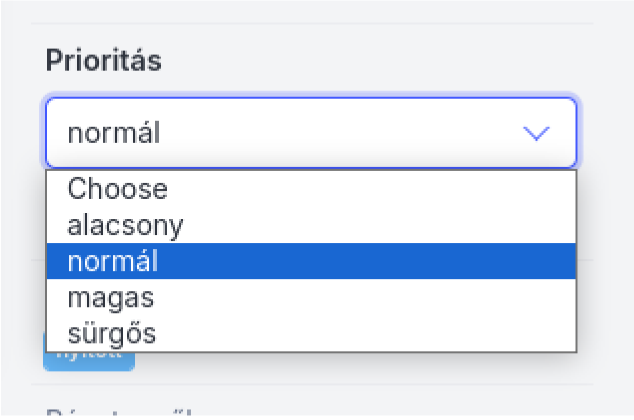

Figure 12. Ticket Priority

Tracking and Updating Tickets

Tracking and updating tickets in the HelpDesk system are crucial for efficient issue resolution. The status of each ticket is continuously updated, ensuring that you always have up-to-date information about its current state.

Both on the "Dashboard" and the "Tickets" pages, you can see the tickets related to you. It displays when their status was last updated, and you can filter them if necessary due to the large volume.

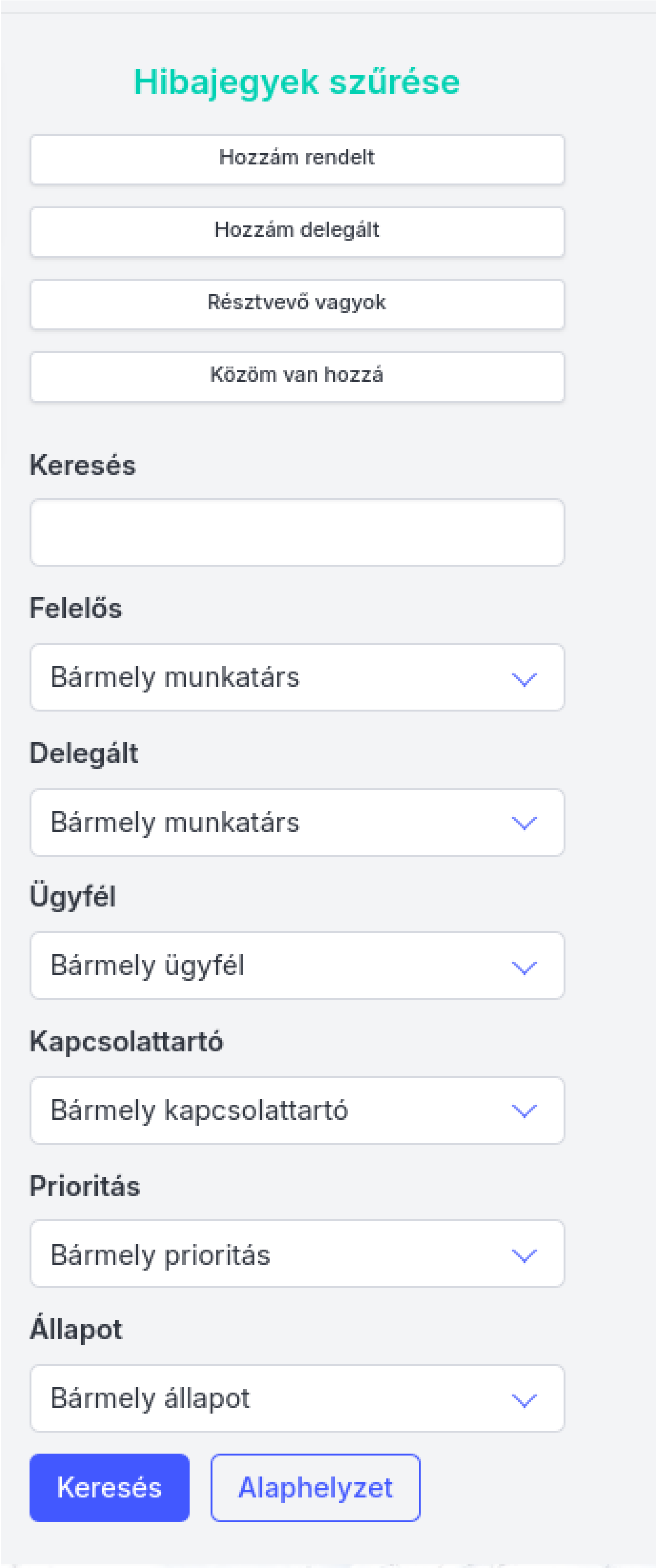

Figure 13. Filtering Tickets

Precise tracking of tickets helps you stay in touch with the support team, facilitating faster issue resolution.

Invoicing

If an invoice is attached to a ticket, you can also see it on the "Tickets" page under the client's delegate.

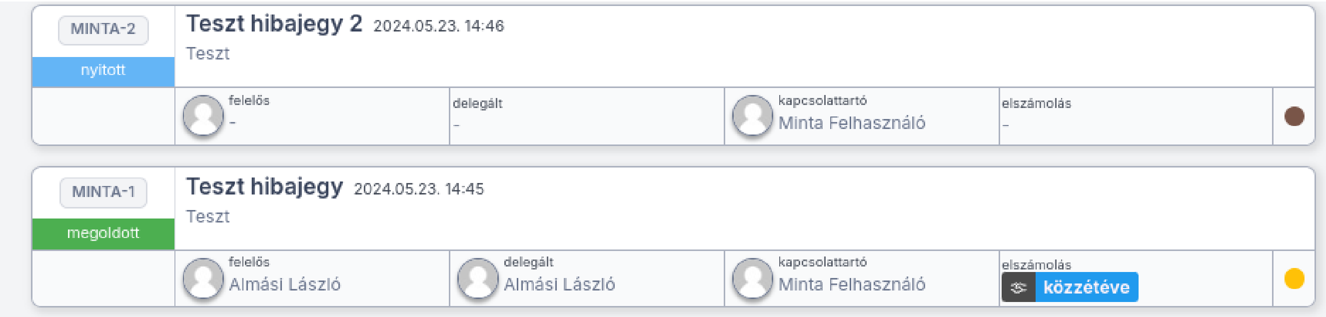

Figure 14. Attached Invoice

A ticket can only be closed, i.e., put into a closed state, if an invoice is attached to it and accepted by the client. When attaching an invoice, the ticket automatically moves to a resolved status. The following details are required for the invoice:

- Assigned staff member
- Which contract and its specific contract line
- The amount to be invoiced

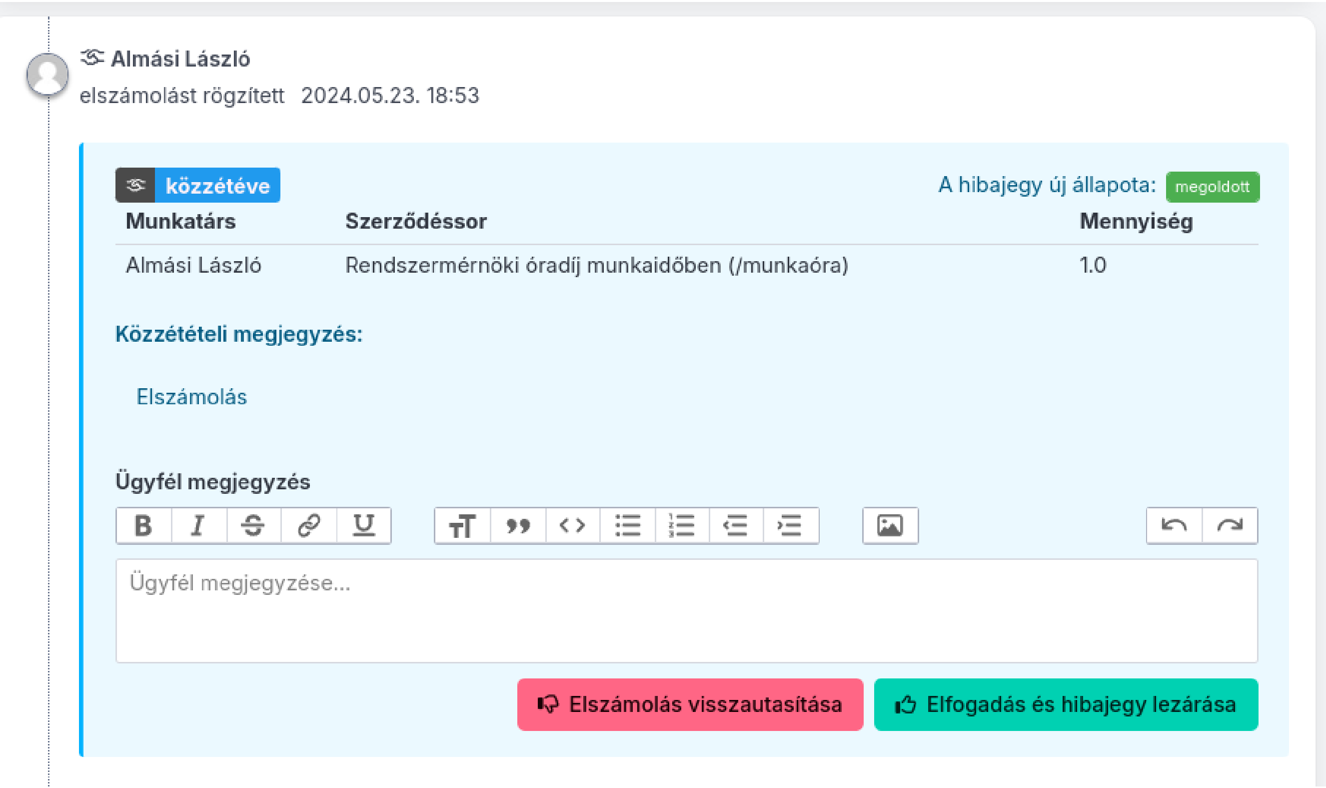

Figure 15. Invoice Details

The client has the option to accept or reject the invoice. If rejected, the ticket status remains in progress; if accepted, the ticket status automatically becomes closed.

Note: Only "highlighted staff" and users and staff with higher user levels can view the amounts in the invoices!

Common Problems and Solutions

Common Problems and Solutions

Authorization Issues

Authorization issues may arise from the system assigning different roles to users. The Helpdesk system can only be used by:

- Contractual clients with user accounts
- Digital Kft. employees (agents, staff)

identified by their email address and password. There are four roles providing access to the system:

- Admin: has full privileges (e.g., managing users)
- Manager: can view and modify all tickets
- Featured Staff: capabilities are similar to Staff, but they can also see billing amounts
- Staff: can view all tickets, but can only modify and comment on assigned ones. They cannot see billing amounts.

If your current role is not sufficient for your tasks, an admin user can assign you a role with higher privileges.

Login Related Issues

If you have forgotten your password, you can request a new one on the "Login" interface. In this case, we will send a password reset email to the provided email address, allowing you to log back into the system.

Contacting Support

Contacting Support

If you have any questions or issues that you cannot resolve on your own, it's important to know how to reach us. You can contact our support team at digital@digital.co.hu. For quick and efficient communication, we recommend providing all necessary information about the problem when contacting us and referring to the ticket number.

Further Information and System Settings

Further Information and System Settings

Configuration Options and Customizations

In the upper right corner of the screen, by clicking on your username, you can view your permission level (role), access your user profile, and change your password.

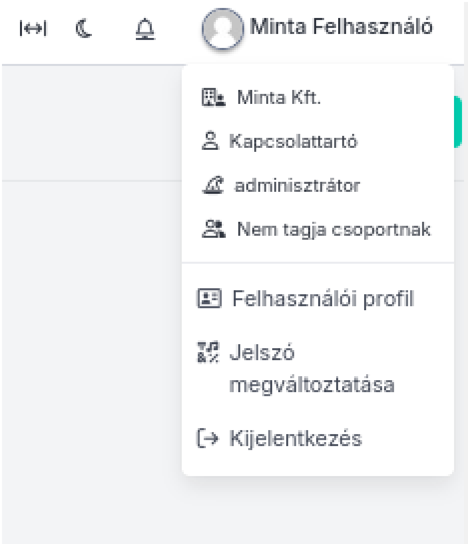

Figure 16. User Settings 1

By clicking on the icons next to your username, you can also modify the appearance and view notifications. Under the User Profile, you can set your preferred language (defaulting to your browser settings) and time zone.

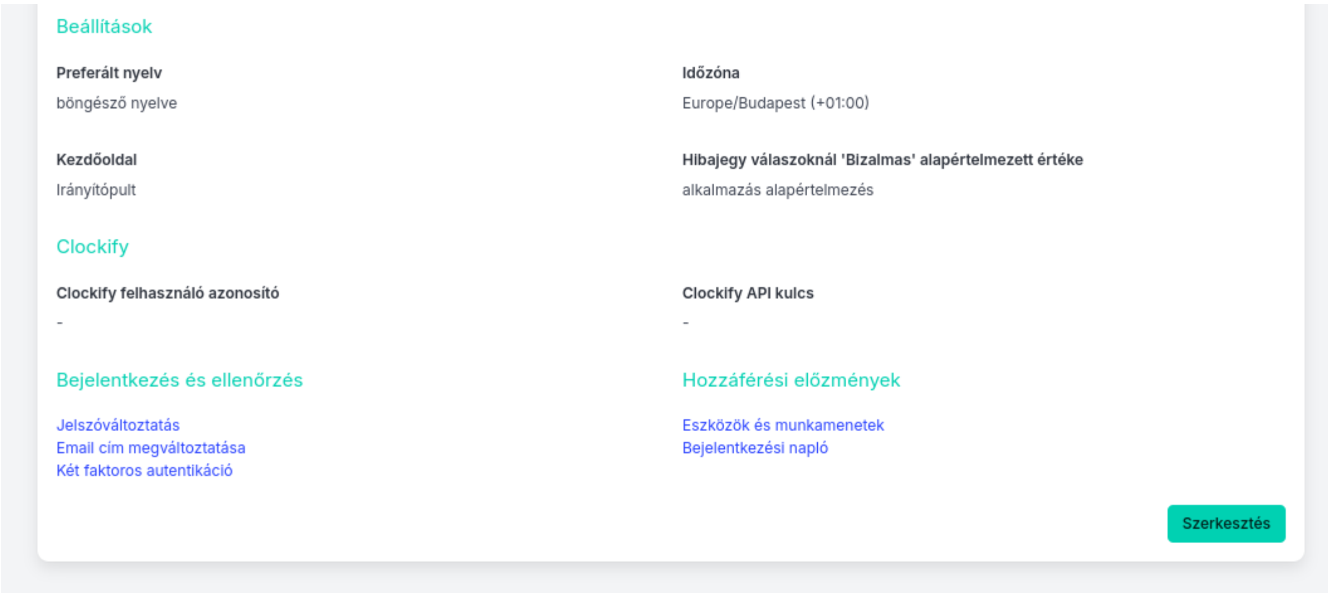

Figure 17. User Settings 2

Here, you can also modify your email address or password.

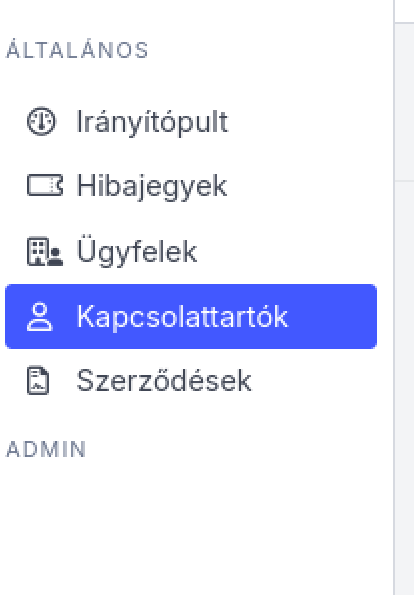

Figure 18. Admin Menu

Users with the "admin" role can not only view contacts but also manage them.

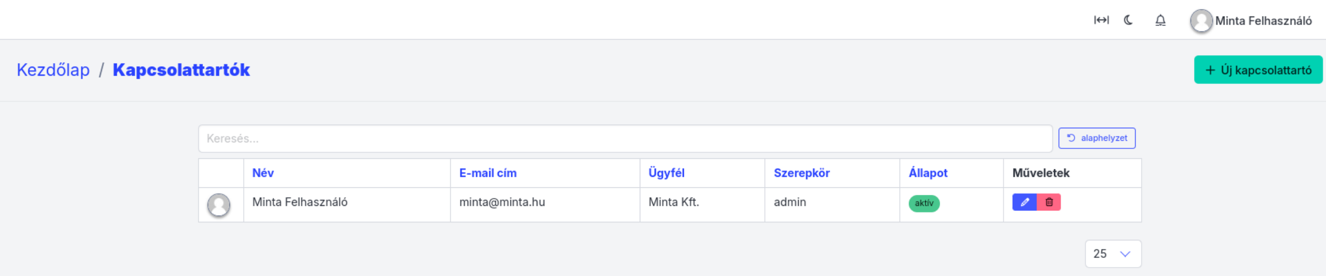

Figure 19. Contacts

They can delete or modify contacts, such as updating their email addresses, phone numbers, statuses, and passwords. By changing the status, they can deactivate a contact.

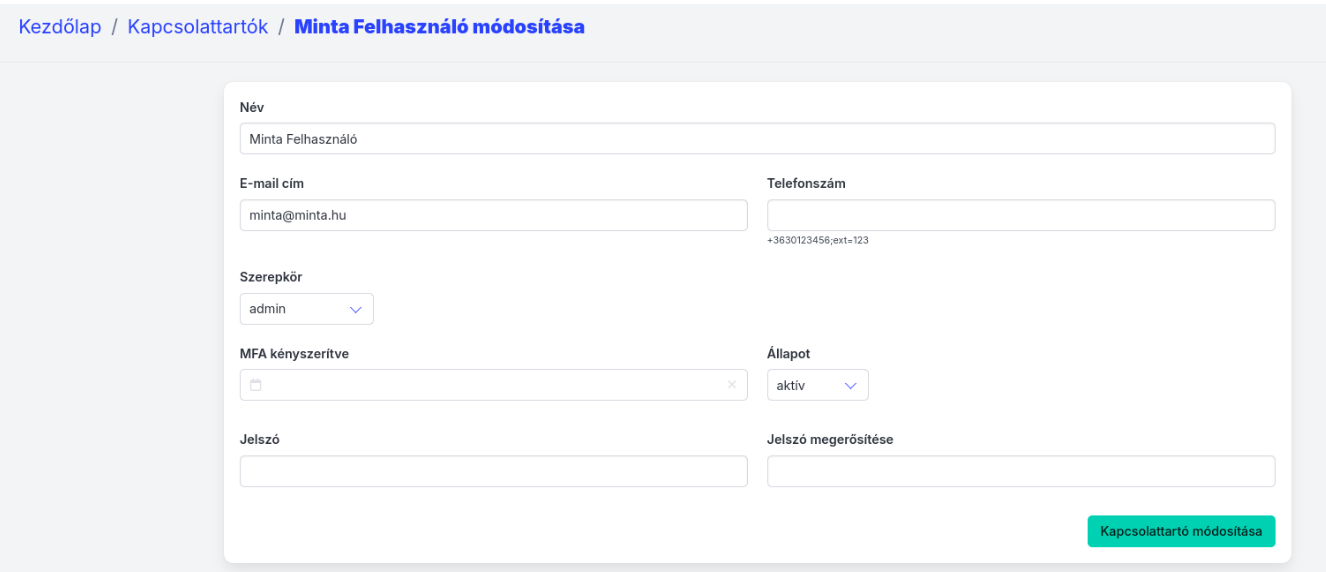

Figure 20. Modify User

Additionally, using the "+ New Contact" button in the upper right corner, you can assign a new user to the customer. Agent admins can create users for any customer, while customer admins can only create users (contacts) for their own company. When creating a user, you can set a password for the new user or send an invitation to the new user; in this case, the password does not need to be set at that moment, as the user can set it during login.

Modifications Executable by Agent Administrators

In addition to previous capabilities, agent administrators are granted the ability to edit customer data.

They can modify the default contact person for customers, who will take precedence in case of email requests if the contact cannot be identified based on the sender.

The new ticket notification group can be set for each customer if the global notification group should not be notified about new tickets.

Mandatory approval for new tickets can be configured. In this case, only the agents and supervisors assigned to the customer can view the tickets until they are approved. It is advisable to specify who should be the approver. The members of the group can approve tickets. If not specified, only contacts with manager and admin roles can approve tickets. Additionally, the Ticket Approval Notification Group can be set to receive notifications about ticket approvals. If not specified, the application will use the new ticket notification group set in the settings.

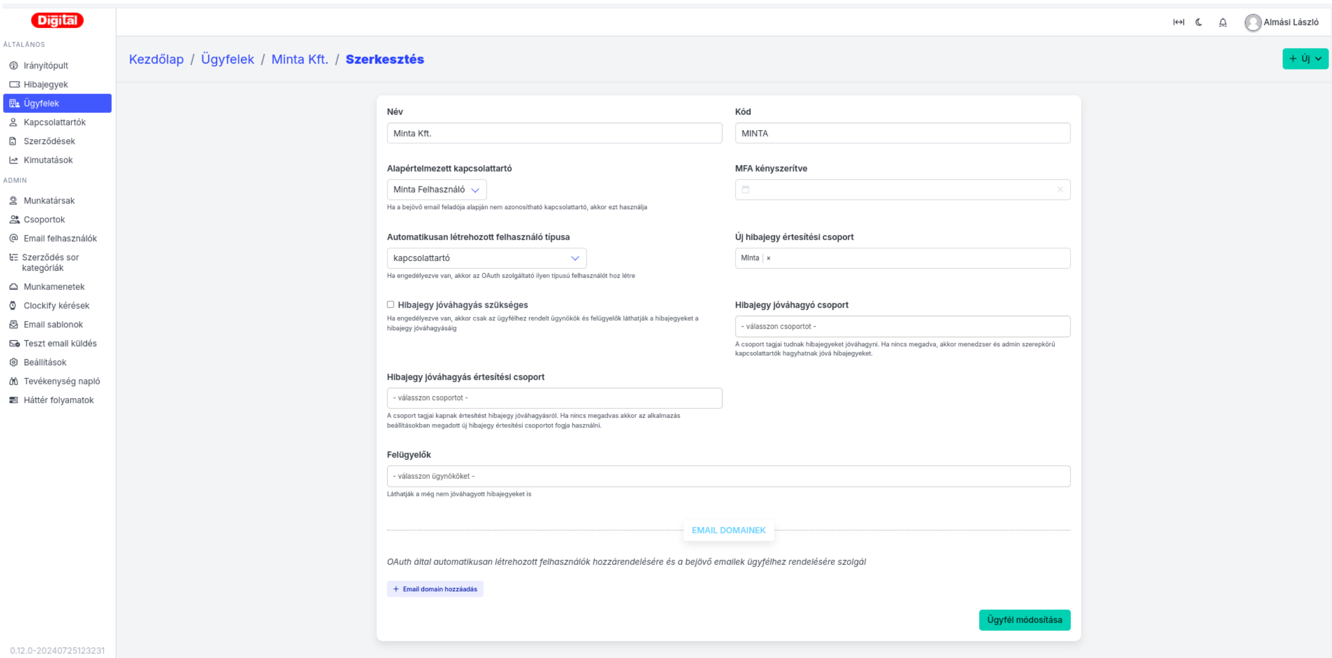

Figure 21. Customer Settings

Agent administrators also have the ability to assign email domains to customers. Requests coming from these specified email domains will automatically be assigned to the customer. The application will automatically create the email user, who will later be able to view all tickets submitted via email.

System Requirements

To ensure smooth operation of the Digital Ltd. Helpdesk System, the following system requirements must be met.

Browsers

The helpdesk system is compatible with the latest versions of modern browsers. Please always use the latest version for better performance and security.

Network Connection

A stable and fast internet connection is required for the efficient operation of the system.

Mobile Devices

The system is accessible from mobile devices; however, for full functionality and user experience, we recommend using a desktop or laptop computer. If you are using a mobile device, please ensure it is running the latest versions of Android or iOS.

If you have any questions or encounter any issues regarding the system requirements, please contact our support team.