



akuiteo

BUSINESS SOFTWARE

User Guide

HELP DESK

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1 Preface

1.1 REVISIONS

Revision 2	Published in February 2022 <ul style="list-style-type: none">• Minor corrections.
Revision 1	Published in November 2021

1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

2 Opening and processing an issue

The **Help Desk** module enables the technical assistance team to quickly process an issue, taking into account the user needs (entering a new issue) to then initiate the process to solve the problem (with tasks). The issue will be considered as effectively solved once it is marked as closed.

2.1 UNDERSTANDING THE LIFE CYCLE OF AN ISSUE

An issue has a status, a status type and a state.

The issue **status** can be set up: Open, Resolved, etc. This information is displayed in bold in the middle of the record sheet. It changes color as the issue is being processed.

The **status type** cannot be set up.

- Created: an issue is created but no task has been initiated yet
- In progress: at least one task is open but not completed
- On hold: an issue is put on hold
- Resolved: the issue is resolved (contract term)
- Closed by customer: problem resolved for the customer but not internally (not carried forward for example), this closure means the customer has validated the resolution
- Closed internally: the issue is closed internally

The **state** code is optional and can be set up. E.g. Answer to be sent, no follow-up, etc.

2.2 CREATING AN ISSUE

There are two ways to create an issue:


- either directly by your customer from the Customer Portal,
- or by a member of the help desk team who enters the issue.

Reference

In Akuiteo, an issue can be linked to an engagement contract. It enables you to know how long you spent on the issue, how much money you spent for this issue and therefore how much you earned. Refer to [Setting up engagement contracts \(p. 12\)](#).

Example

A customer emails you or calls you to request an evolution or report a bug. You can quickly enter, in real time, all the relevant information in the pre-filled fields. To do so, you must define the context.

- 1 Go to **Help Desk > New issue** and, depending on the information collected from your interlocutor, fill in the **Customer**, **Contract** and **Product** sections:
 - either by manually filling in the fields,
 - or by double-clicking in the help lists. If you enable the filters using the  button, only the maintenance customers/sites and site contacts will be suggested.
- 2 If needed, quickly create new customers / contacts. If the customer or the contact does not yet exist in Akuiteo:
 1. Create a new prospect or customer contact by clicking on the icons on the right of the **Customer / Location / Requester** section.
 2. Enter the relevant information for the creation, such as text, images and hyperlinks.
- 3 If needed, link the issue to a supplier contract or an existing issue.

Linking the maintained products - and therefore the issue - to one or several supplier contracts

Select a maintained product in the **Product** section. If the selected product is linked to a contract, the **Supplier contract** section opens to enable you select one contract, that will be the issue's contract. If only one supplier contract is found, it is automatically linked to the issue.

At any time, it is possible to link or unlink a supplier contract using the section icons. The relevant supplier is also displayed on the left above the contract.

Linking the issue to an existing issue

In the **Issues from the customer** section, the list displays by default the non-closed issues for the selected customer from the last 8 days. You can filter by closed issues or other criteria.

If needed, link the issue to another issue as a:

- Parent: the issue is a problem that generates another problem. You can link the new issue to several existing issues, as the "parent" one.
- Child: the issue is a problem caused by another problem.


Creating an out-of-contract or out-of-scope issue

A customer calls your Help Desk team about an issue that is not linked to a contract (e.g. contract has already expired) or that is out of the scope of the contracts (e.g. wrong use of the product, which is not covered by the assistance).

However, you want to be able to track this issue and easily search for it. In the **Contract / Service** section:

- If the issue is out of contract, empty the **Contract** field. The **Piecemeal** box is automatically checked if no customer has been selected OR if the selected customer is not linked to a contract.
- If the issue is out of scope, empty the **Service** field and check the **Out of scope** box. The **Out of scope** box is automatically checked if the selected customer is not linked to a contract OR a service OR a product OR is linked to a product outside of the scope of the service.

You can then search for issues by checking the **Piecemeal** or **Out of scope** boxes as search criteria.

- 4 Click on  to create the issue.
- 5 In the dialog box that opens, enter the work group in charge of the issue. The manager will therefore retrieve the issue and assign related tasks to employees. This step is required.
- 6 In the issue screen, fill in the desired fields, including:
 - **External description:** enables you to enter the issue as stated by the customer. You can add images by copying and pasting them in the area.
 - **Customer response:** enables you to enter details such as "the issue will be processed as soon as possible".

Important

The external information can be viewed by everyone. Any confidential information should be entered in the **Internal description / Internal report**.

- **Error code:** enables you to enter a known error code linked to a product (e.g. Error 404).
- **Resolution pilot:** enables you to specify the name of the employee who entered the issue. This information is not linked to the work group.

- 7 Save.

↳ An **input task** is created. From now on, you will follow the issue's life cycle. Refer to the [Understanding the life cycle of an issue \(p. 5\)](#) section.

Click on **Edit > Send issue by email/fax** to send the issue by email.

If you want to change the user or the requester, switch to the modification mode and select the right contacts.

Note

To save time on the input, you can duplicate an issue from an existing issue by clicking on **Edit > Duplicate**.

2.3 PROCESSING AN ISSUE

Your issue has been created, which automatically generated an input task. To proceed with the initial issue, you must perform tasks (development, tests, etc.), i.e. actions that will be tracked in Akuiteo and therefore valued.

2.3.1 Creating a task

You have just finished [Creating an issue \(p. 5\)](#).

- 1 From the issue record sheet, go to **Edit > Add task**.

- 2 In the task screen that opens, fill in the **Task type** field and enter the report with the actions performed.
- 3 Save.

Once the task is done, you must complete it.

2.3.2 Completing a task

- 1 From a task record sheet, go to **Edit > Complete**.
- 2 Click on **Enter time** if you want to indicate the number of hours or days spent on the task. This "quick" time input automatically updates your timesheet:
 - Task context: enables you to adapt the scheduled time spent on this task.
 - Time spent on the task (all): check **All my time spent this week** to show all the timesheet entries and get an overview of the current or previous week (provided the **Week** box is checked).
 - Time record details: enables you to enter the time spent on the task for the given day.
- 3 Click on **Exit** to confirm.
- 4 In the **Complete task** window, you can:
 - either complete the task directly by specifying:
 - its start and end dates,
 - the actions performed (task, resolution, closure),
 - its new status (e.g.: Processed) and its new state code (To deliver),
 - the version to correct and the corrective version;
 - or open a new task by checking **Launch new task**, selecting the task type and filling in the information needed. The task creation process re-starts (selection of a working group, and so on).

Reminder: Do not forget to fill in the **Customer response** with updates about actions performed for this task.

- 5 Validate.

Note

If the task end date is not specified, it is possible to enter timesheet entries in the future by enabling the DMF 060346 PROJECTS TIMESHEETS ENTER TIME IN THE FUTURE.

Completing timesheets weekly or monthly

You can easily complete your timesheets for a week or a month:

- 1 Enable the **TPS_TERMINAISON** management rule. Enter one of the following values in the first field:

Value	Description
Empty field	Timesheets are completed monthly.
SEMAINE	Timesheets are completed weekly rather than monthly.
SEMAINE_ MOIS	<p>Timesheets are completed weekly. However, for the last week of a month, the employee can complete the timesheet both weekly and monthly.</p> <div> <p>Example</p> <p>A month ends on Saturday, 31. If the SEMAINE_MOIS value is specified in the TPS_TERMINAISON management rule, for this last week, the employee can:</p> <ul style="list-style-type: none"> complete the timesheet for the month until Saturday, 31; complete the timesheet for the week, from Monday, 26 to Sunday, 1. </div>

2 Enable the following DMFs depending on the desired timesheets completion:

- 060353 PROJECTS TIMESHEETS COMPLETE TIMESHEETS WEEKLY
- 060354 PROJECTS TIMESHEETS COMPLETE TIMESHEETS MONTHLY

Note

For the **SEMAINE_MOIS** completion type, both DMFs must be enabled.

3 Restart the Application Desktop.

4 Go to **My Akuiteo > My timesheet**, then click on **Edit > Complete the timesheet for the week** or **Complete the timesheet for the month**.

Automatic reminders are also set up for the interactive personal dashboard:

- reminder in the personal dashboard if the month is not completed (month preceding the current day)
- reminder in the personal dashboard if the week is not completed (week preceding the current day)

Modifying the context of an issue after the completion

Once you complete a task, you can then modify the context of the issue. After the context has been modified, the issue's completion window opens again.

If you had scheduled a questionnaire on a customer response for the task completion, you must switch to the modification mode right before the completion to be able to answer this questionnaire.

Otherwise, if the customer response is already filled in (for example using an initialization control or if the questionnaire was already answered), the task can be completed but you will not be able to modify the response during the completion.

You cannot complete a task if the response field is empty and is linked to a questionnaire.


2.3.3 Putting a task on hold

A task can be put on hold if needed to adjust the time counter.

Example

An issue is created at 2 AM, after office hours. You call your customer at 9:42 AM to get more information about the issue but no one answers. To avoid exceeding the delay of response, you must put the issue on hold until the customer answers. Once you get an answer, you can resume the task.

An issue can be put on hold from the issue or the task record sheet.

- 1 Click on **Edit > On hold**.
- 2 In the on hold screen, indicate the reason and the new status that you want to apply to the task then validate.
 In the record sheet header, the **ON HOLD** status is displayed and the countdown is stopped.

To resume the task, click on **Edit > Resume**.

Note

The 'lost' work time due to the issue being on hold (calculated on the issue's action schedules) is taken into account when recalculating the due dates for the Guaranteed Response Time and the Guaranteed Fault Repair Time, and is added to the issue's on hold time.

2.4 CLOSING OR CANCELING AN ISSUE

To close an issue from the issue record sheet, this issue must be Resolved.

- 1 Click on **Edit > Close issue**.
- 2 In the **Closing the issue** dialog box, enter the relevant information and validate.

To close an issue from a task, the process is the same than for [Completing a task \(p. 8\)](#).

To cancel an issue:

- 1 Click on **Edit > Cancel**.
- 2 In the **Cancel issue** dialog box, specify the issue's closure dates, new status and state code, then validate.

You can also cancel the closure of an issue if needed.

- 1 From the closed issued, go to **Edit > Unclose**.
- 2 In the **Unclose the request** dialog box, specify the reason for canceling the closure of the issue, enter the new status / state codes, then validate.

- 3 In the **Duplicate task** dialog box, fill in the information to recreate a "quick" task. The former issue or task is archived.

2.5 SEARCHING FOR AN ISSUE OR A TASK

To search for an issue

Click on **Help Desk > Issues and tasks**.

In the fields of the **Issue main criteria** tab, enter the search information such as the issue number, the customer or information about the issue's life cycle. The **Additional criteria** tab enables you to refine your search.

To search for a task

- 1 Click on **Help Desk > Issues and tasks**.
- 2 Enter the following information in the fields of the **Task main criteria** tab:
 - Multiple options: criteria to filter the tasks (In progress, Completed, etc.)
 - General properties: the task title and type
 - Contacts and Responders: the people and groups associated with the tasks
 - Dates and deadlines: all the dates, deadlines and due dates associated with the tasks
 - Text searches: within reports and error messages
- 3 In the fields of the **Task additional criteria** tab, enter the following information:
 - Context: contract, service, product, location, etc.
 - Version and Revisions: the product's corrective or to correct revisions via a task
 - Resource requests: profile, deadline, circumstances and duration
 - Timesheet: criteria to select timesheets on tasks

3 Setting up engagement contracts

You can link an issue to a contract by specifying the Guaranteed Response Time and the Guaranteed Fault Repair Time. These guarantees are part of a Service Level Agreement (SLA), i.e. a contract or part of a contract that specifies a set of services to provide to your customer.

This contract contains clauses for deadlines to meet in order to avoid penalties. The deadline is contractually very important. Note that deadlines can be linked to contracts but also to a person or a company.

In addition, linking a contract to an issue enables you to automate the input and start a colored counter in the task record sheet:

- Green: the deadline is met, there are more than X hours left to take action (2 hours by default; refer to the setup)
- Orange: the deadline is met, but there are less than X hours left to take action (2 hours by default)
- Red: the deadline is no longer met (blinks once 00:00 is reached)

3.1 EXAMPLE

Let us say the Guaranteed Response Time is set to 4 hours (issue taken into account within 4 hours of its creation) and the Guaranteed Fault Repair Time is set to 2 days (issue resolved within 2 days).

When a contract is agreed on, you set up the following items in Akuiteo:

- Guaranteed Response Time and/or Guaranteed Fault Repair Time.
- Reception schedule: time period during which the issue is received and assessed. E.g. the issue must be assessed and entered within 4 hours after its reception.
- Action schedule: time period during which the issue is processed. E.g. the issue must be processed and resolved within 48 hours after its creation.

An issue is sent by email at 2 AM. Though the issue immediately drops in the company's inbox, it will only be read at 9 AM.

The contract states that an issue must be assessed within 4 hours after its reception between 9 AM and 6 PM (**reception time slot**).

The issue is assessed and entered at 5 PM and will be sent to the Production team the day after, from 9 AM to 12 PM, as soon as the issue will be received.

Note about 24 hours and 1 day


1 day is not considered as 24 hours in a row.

- If the contract is in hours and if you want to add a working day of 24 hours, then you must add 24 hours from the hour being taken into account.
- If the contract is in days and if you want to add a working day, then you must add a day that will necessarily end at the end of the day, i.e. at the end of the activity period (6 PM for example).

3.2 CREATING A CONTRACT

When a customer wants to subscribe to a maintenance contract, you must enter it in the Help Desk module.

Prerequisites: the data related to the Guaranteed Repair Time and the Guaranteed Fault Repair Time must be set up from **Tools > Setup > Help Desk setup > Issues and tasks > Service Level Agreements (SLA)**.

- 1 Click on **Help Desk > Contracts > Customer contracts** > .
- 2 In the **New contract** screen, fill in the general information about the sales contract. The contract must be linked to a project.
- 3 In the **Maintenance and penalties** tab, specify if the customer wants to apply penalties in case the issues are not processed and resolved within the given deadline.
- 4 Save.

Information regarding the Guaranteed Repair Time and the Guaranteed Fault Repair Time must be entered in the contract lines, in the **Services** or **Deadlines and Plans** tabs.

Updating contract lines

You can update and mark as "not billed" multiple contract lines at once.

- 1 Open a help desk contract that has several lines.
- 2 In the **Lines** tab, select the desired lines and right-click.
- 3 Select **Update the selected lines**.
- 4 In the dialog box that opens, check **Not billed** then validate.

4 Using questionnaires to improve issues input

The Help Desk questionnaires are used to simplify discussions between employees acting as "call center agents" and customers; they include a series of questions to ask depending on the customer's needs and level of expertise. Once set up, this feature is automatically started when you create a Help desk issue from the Application Desktop or the Customer Portal.

Questionnaires simplify:

- the automatic input of the issue's external description,
- the input of the issue's fields,
- the calculation of the issue's resolution deadlines,
- the customized answers depending on the customer.

These questions are actually assertions displayed as pop-up messages in Akuiteo. The Help desk team must select the assertions as they are displayed.

Example

Question 1: Your computer brand is DELL / APPLE / ACER.

Question 2: The year of manufacture is before 2013 / in 2013 / after 2013.

Question 3: The Operating System installed is Windows / Mac OS / Linux.

You can add a dozen of questions like this to refine the input.

4.1 IMPORTING YOUR QUESTIONS IN AKUITEO

With the help of an Akuiteo consultant:

- 1 Create an import file in text format including the list of questions you want to ask your customers. Make sure you create a tree structure:

Example

Question 1: Your computer brand is DELL / APPLE / ACER.

Answer 1: DELL

Depending on answer 1, question 2 is enabled.

Question 2: The year of manufacture is before 2013 / in 2013 / after 2013.

Answer 2: before 2013

Depending on answer 2, question 3 is enabled.

Question 3: The Operating System installed is Windows / Mac OS / Linux.

Answer 3: Windows

- 2 Once your file is ready, go to **Tools > Setup > Help Desk setup > Other parameters > Questionnaires**.
- 3 From the questionnaire search screen, click on **Edit > Import of questionnaires**.
- 4 Click on **Browse** and select the file.
- 5 Select the **Tabulation** separator and start the import by clicking on **OK**.

4.2 AUTOMATING QUESTIONS

You can now define the actions that will trigger the opening of a questionnaire when creating a help desk issue.

- 1 Go to **Tools > Setup > Help Desk setup > Other parameters > Questionnaires**.
- 2 Start a search from the **Questionnaire** screen.
- 3 Select your questionnaire in the results list and modify it.
- 4 In the **Questionnaire** section, modify the data if needed and the validity dates.
- 5 Select **No systematic additional question** to block any comment entry in the selection's pop-up screen.
- 6 In the **Linked objects** section, select the following keywords:
 - Customer: To link a questionnaire to a customer. The questionnaire is displayed during the input of a new issue, when selecting the customer.
 - Qualification of the issue: To link a questionnaire to the product type. The questionnaire is displayed during the input of a new issue, when you double-click on an issue's external description.
 - Deadline calculation: To link a deadline questionnaire associated with the customer when dealing with Guaranteed Response Time and Guaranteed Fault Repair Time. The questionnaire is displayed during the input of a new issue, when you save the issue. It enables you to trigger the counter system.

- Complete task: To link a questionnaire to a task. The questionnaire is displayed when you double-click on the task's external description. Therefore, the help desk team member can enter a comprehensive description of the issue.

- 7** In the **Object type** column, select the customers, tasks, etc. on which the questionnaire should be started.
- 8** Adjust the previous information by selecting the type of action to associate with a questionnaire in the **Object code** column.
- 9** Add a new object if needed then save.

Your questionnaires are ready to be triggered as you enter information in the Help desk module of Akuiteo.

5 Sending notifications when an issue changes status

There are 4 cases when an alert notification can be sent after an issue is saved:

- **Open:** the first time an issue with an external description is saved.
- **Resolved:** the issue is marked as contractually resolved.
- **Closure:** the issue is marked as closed on the customer's side.
- **Changes of state:** the issue status is modified.


These alerts depend on the engagement contracts and must be enabled from a contract.

5.1 DEFINING THE CONTACTS TO BE NOTIFIED

You must first define the recipients of the alert notifications. They must be linked to the contract and must be able to receive messages by email or fax (enabled options).


Several types of contacts can be defined, i.e. contacts and employees linked to:

The products

- 1 Go to **Help Desk > Maintained products** and start a search.
- 2 Open the relevant record sheet and click on the **Contact interlocutors** or **Employee interlocutors** tab, depending on your needs, then switch to the modification mode.
- 3 Click on , add the recipients and save.


The contract sites

It can also be called the site of the customer linked to the contract.



- 1 Go to **Help Desk > Contracts > Customer contracts**, then start a search.
- 2 Open the relevant record sheet and click on the **Main** tab.
- 3 Click on the customer's hyperlink to access the record sheet.
- 4 In the customer record sheet, click on the **Sites** tab and double-click on the site.
- 5 From the **Site** record sheet, go to **Edit > Alert management**.
- 6 Click on , add the recipients and save.

The contract


- 1 Go to **Help Desk > Contracts > Customer contracts**, then start a search.
- 2 Open the relevant record sheet and click on the **Contacts for alerts** tab.

- 3 Click on , add the recipients and save.

The contract services

- 1 Go to **Help Desk > Contracts > Customer contracts**, then start a search.
- 2 Open the relevant record sheet and click on the **Services** tab >  > click on the **Interlocutors handling alerts** sub-tab.
- 3 Click on the **Insert interlocutor** icon, then on  to validate.
- 4 Save.

The customers

- 1 Go to **Help Desk > Contracts > Customer contracts**, then start a search.
- 2 Open the relevant record sheet and click on the **Main** tab.
- 3 Click on the customer's hyperlink to access the record sheet.
- 4 In the customer record sheet, go to **Edit > Help Desk Management > Alert management**.
- 5 Click on , add the recipients and save.

5.2 ENABLING ALERTS



- 1 Go to **Help Desk > Contracts > Customer contracts**, start a search then open the relevant record sheet.
- 2 Go to **Edit > Alert management**.
- 3 In the **Contract alerts management** section of the **Maintenance and penalties** tab, check the boxes for the desired recipients depending on your needs and save.

These boxes enable you to trigger an alert in Akuiteo based on the contacts that were previously defined.

5.3 DEFINING THE FORMAT OF THE ALERTS SENT BY EMAIL TO THE CUSTOMER'S CONTACTS

Note: the contact must be linked to the customer's main site.

- 1 From **People > Customers/Prospects**, open the record sheet of a customer linked to the contract.
- 2 From the **Customer** record sheet, go to **Edit > Help Desk Management > Alert management**. The **Help desk alerts** tab is added to the customer record sheet.

- 3 Switch to the modification mode, click on  and select the format for the emails sent automatically.
- 4 Select the type of issue that will trigger an alert: open, resolution, external / internal closure and status change.
- 5 For each option, enter the keyword to be displayed in the email's subject and specify the ALERT-type email template.
- 6 Add details about the contact in the **Interlocutors handling alerts** section and click on  to validate.
- 7 Click on the **Contacts** tab and select the relevant contact.
- 8 In the **Contact** record sheet, click on the **Help desk alerts** tab and select the relevant boxes.

5.4 DEFINING THE FORMAT OF THE ALERTS SENT BY EMAIL TO THE EMPLOYEES

- 1 From **People > Resources**, open the employee record sheet.
- 2 Click on the **Parameters** tab and switch to the modification mode.
- 3 Check the relevant boxes and save.

6 Using checkbooks

One of your customers asks for an additional task (training, repair work, etc.) that was not included in the maintenance package (with or without a contract). In this case, you can suggest that your customer uses checkbooks.


A checkbook has a number of checks, in which 1 check = 1 task.

This system has no impact on the current contract, but brings you more flexibility in order for you to provide additional assistance outside of the maintenance contract.

6.1 PREREQUISITES

- Enable the following DMFs:
 - 1403** SETUP CHECKBOOKS *
 - 140301 SETUP CHECKBOOKS NEW
 - 140302 SETUP CHECKBOOKS MODIFY
 - 140303 SETUP CHECKBOOKS DELETE
 - 140304 SETUP CHECKBOOKS SEARCH
 - 140305 SETUP CHECKBOOKS SHOW MEMBERS TAB
- Set up the checkbook units (EUR or HOUR).

6.2 CREATING A CHECKBOOK

- 1 Go to **Help Desk > Contracts > Checkbook management** > .
- 2 In the **Main** tab > **General information** section, fill in the following information:
 - Checkbook's call name. E.g. CHECK-2015
 - Manager who created the checkbook.
 - Customer of the project or contract linked to the checkbook.
 - Project related to the sold checkbook. The project will only involve timesheets because the checkbook compensates timesheets.
- 3 In the **Main** tab > **Arrangements** section, select:
 - Decremental if the checks in the checkbook must be automatically counted as tasks are completed (recommended if you plan to bill the checkbook on a yearly basis).
 - Incremental if the checkbook is not scheduled and you plan to bill it at the end of each month for example.
- 4 Fill in the following fields:
 - Valid from... to: the checkbook's validity period (for informational purposes only).
 - Use time: related to the above-mentioned information (for informational purposes only).
 - Sale price: the checkbook's price (for informational purposes only).
 - Unit value: the check's price in euros or in hours.

- Number of checks in a checkbook.
- Renewal threshold: specific state (you must enter a number, for example 5 max).


5 In the **Billing** tab, manually add the invoice that you previously created or that is linked to the project.

6 In the **Links** tab, click on .

- Select the associated contract in the **Contract** column.
- Specify the number of products in the contract in the **Qty** column.

6.3 USING A CHECKBOOK

Checkbooks are used from an issue.

- 1** Open the issue and go to **Edit > Count checks**.
- 2** Double-click on the relevant task in the window that opens. The selected task must be completed.
- 3** Enter all relevant information and click on  to validate the checks count.
- 4** Click on **Exit** to close the window.

Note

You can start a search for checkbooks from the issue, by clicking on **Edit > Checkbooks for the contract**.

7 Using messages on issues

Akuiteo enables you to discuss with customers about their issues, via a messaging tool integrated in the Customer Portal and the Application Desktop.

Prerequisites

The following DMFs must be enabled for the relevant user profiles:

147012 HELPDESK EXTRANET ISSUE MESSAGES

141341 HELPDESK ISSUES ISSUE MESSAGES

141342 HELPDESK ISSUES BLOCK/UNBLOCK ISSUE MESSAGES

7.1 SETTING UP MESSAGES ON ISSUES

- 1 Go to **Tools > Setup > Help Desk setup > Issues and tasks > Issue messages**.
- 2 Enter the relevant information then save:

Issue messages section

- 1 Check **Activate messages for issues** to customize the display in the Customer Portal.
- 2 Select the type of information to display in the message:
 - Nothing: does not display information about the person who created the issue
 - Name of issue work group: give a name to the group that can be understood and viewed by your customers in the portal
 - First and last name of person writing the messages
 - Other indication: to customize in the input field

Customer email section

- 1 Check **Enable automatic email alerts to the customer** to set the types of message that your customer will receive based on the actions of the Help Desk team.
- 2 In the **Object** field, enter the title of the email that will be displayed as the email object line.
- 3 In the **Email message body** field, specify the BIRT template (without the .rptdesign extension) to use as the email body.
- 4 In the table, check the direct (To), indirect (Cc) or hidden (Bcc) recipients of the email.

Help desk email section

- 1 Check **Enable email alerts to the help desk team** to set the types of messages that the Help Desk team will receive.

- 2 In the **Object** field, enter the "keyword" in order to define the title of the email that will be displayed in the email object line.
- 3 In the **Email message body** field, specify the BIRT template (without the .rptdesign extension) to use as the email body.
- 4 In the table, check the direct (To), indirect (Cc) or hidden (Bcc) recipients of the email.

7.2 ENTERING A MESSAGE ON THE CUSTOMER PORTAL (CUSTOMER SIDE)

To send a message from an issue to the Help Desk:

- 1 Log into the Customer Portal using your login information.
- 2 Open an issue from the **Help Desk** menu.
- 3 At the bottom of the issue, write a message in the **Messages** section then click on **Send**. Your message is displayed under the issue and can be seen by anyone who has access to this issue.

Once the issue is saved, you receive a confirmation email in your inbox.

Then, you will receive a message with a hyperlink that will redirect you to the Customer Portal where you will be able to see the answer to your message.

Important

You cannot add images to your message. This feature only enables you to send short messages to help you quickly and efficiently communicate with the Help Desk.

7.3 REPLYING TO A MESSAGE COMING FROM THE CUSTOMER PORTAL (HELP DESK SIDE)

To reply to a message sent by a customer regarding a Help Desk issue:

- 1 Start the Application Desktop and click on the hyperlink in the email to open the issue.
- 2 Click on the **Messages** tab that is now available in the issue screen.
- 3 Directly answer the message from the bottom of the issue screen and save.

Your answer is automatically displayed in the Customer Portal and the customer is notified by email.