

HelpSpot Basics

Introduction

This wiki explains the basics of navigating the HelpSpot ticketing system.

Note (For users submitting tickets via email):

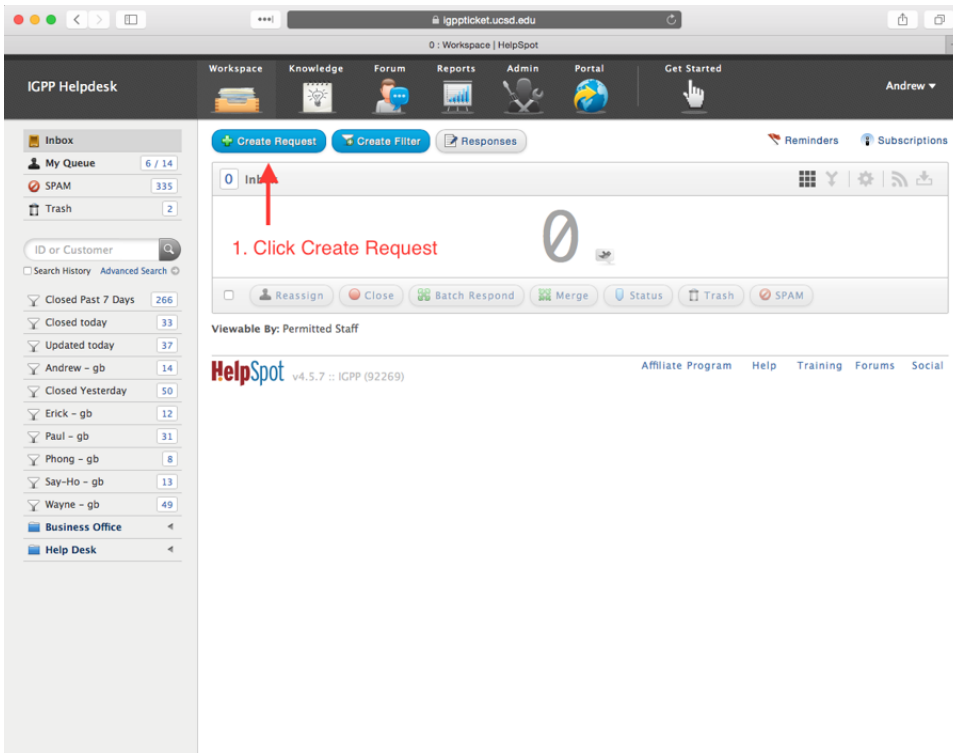
To respond to an existing ticket, make sure to include the ticket number at the end of the subject line:

Subject: Something Interesting {12345}

If the email does not have such a ticket number in the subject line then Helpspot will make a new ticket automatically.

Creating a New Ticket:

1. Click **Create Request**.
2. Under **Customer** tab, enter first or last name of person making the help request. Click Live Lookup, if requestor is in IGPPDB, to automatically fill in their information. Otherwise, fill in additional fields manually.
3. **Contact Via** selection to choose how the requestor made initial contact.
4. Assign **Category** (i.e. Business Office, Biz - Academic Hiring).
5. Under **Assigned To**: select person responsible for completing the ticket's work, or INBOX if uncertain of assignment.
6. Enter in any pertinent information (i.e. Employee ID number, start date, etc.).
7. **Public, Private, External** selection. **Public** to notify Customer (person making request) entered above. **Private** to not notify customer, but could notify internal staff. **External** if necessary to notify outside users (i.e. outside of IGPP and/or UCSD).
8. **Select Staff** to notify any additional internal staff.
9. Click **Create Request** to submit the ticket.



IGPP Helpdesk

Workspace Knowledge Forum Reports Admin Portal Get Started

53322 - Manage Request | HelpSpot

Andrew

Inbox 1
My Queue 6 / 13
SPAM 335
Trash 2

ID or Customer
Search History Advanced Search

Closed Past 7 Days 269
Closed today 36
Updated today 44
Andrew - gb 13
Closed Yesterday 50
Erick - gb 10
Paul - gb 31
Phong - gb 8
Say-Ho - gb 13
Wayne - gb 49
Business Office
Help Desk

Customer History Search 18 Live Lookup

First Name Wayne Last Name Chen Contacted Via Staff Initiated
Email wchen@ucsd.edu Phone 25131 Customer ID 284

Note Search: Responses Responses Knowledge

Hi Wayne,
Task complete. Please let me know if you have any questions.
Thanks.
andrew

1. Add any predetermined responses by clicking on Responses or manually type in any other relevant information.

2. Select Public to notify Customer listed above. Select Private for internal notes and/or notify internal staff. Select External to include people outside of IGPP/UCSD.

Public Private External Attach Drafts (3)

Private Note Options Staff only, not visible to customers
Notify Staff Select Staff

Update Request Update and Close

53322
Status Active
Category Wiki
Assigned To Andrew Chan
Subject
Urgent

3. Click Update Request to send update. Select Update and Close to send update and close the ticket.

IGPP Helpdesk

Workspace Knowledge Forum Reports Admin Portal Get Started

Create Request | HelpSpot

Andrew

Inbox 7 / 13
SPAM 335
Trash 3

ID or Customer
Search History Advanced Search

Closed Past 7 Days 267
Closed today 34
Updated today 41
Andrew - gb 13
Closed Yesterday 50
Erick - gb 12
Paul - gb 31
Phong - gb 8
Say-Ho - gb 13
Wayne - gb 49
Business Office
Help Desk

Customer History Search Live Lookup

3. Make Selection for Contact Via

First Name Andrew Last Name Chan Contacted Via Staff Initiated
Email andrewchan@ucsd.edu Phone 41753 Customer ID 863

Note Search: Responses Responses Knowledge

Please setup new user..

4. Select appropriate Category

5. Select appropriate choice for Assigned To

6. Include any pertinent information

7. Select Public to include person listed as customer to notify. Otherwise, leave it on Private.

Public Private External Attach

Private Note Options Staff only, not visible to customers
Notify Staff Select Staff

8. Select Staff to notify, if necessary

Create Request Create and Close

New Request
Status Active
Category Accounts
Assigned To Andrew Chan
Reporting Tags
igppod
AD
SIO Google Domain
Subject
Urgent

9. Click Create Request

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Updating An Existing Ticket:

1. Open ticket, add any predetermined response by clicking on **Responses** or manually type in any other relevant information.
2. Select **Public** to notify Customer listed above. Select **Private** for internal notes and/or notify internal staff. Select **External** to include people outside of IGPP/UCSD.

3. Click **Update Request** to send update. Select **Update and Close** to send update and close the ticket.

2. Enter first or last name of person making help request. Then click on Live Lookup, if requestor is in IGPPDB, to automatically fill in their information. Otherwise, fill in additional fields manually.