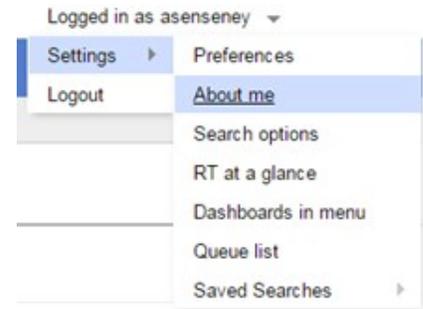# REQUEST TRACKER TRAINING

PURPOSE OF REQUEST TRACKER

Request Tracker (RT) is a 3rd party system that allows us to manage our shared email boxes and to track all negative escalation tickets opened in DOLI.

HOW TO ACCESS REQUEST TRACKER

1. In your browser, go to rt.installs.com or use the link in DOLI.
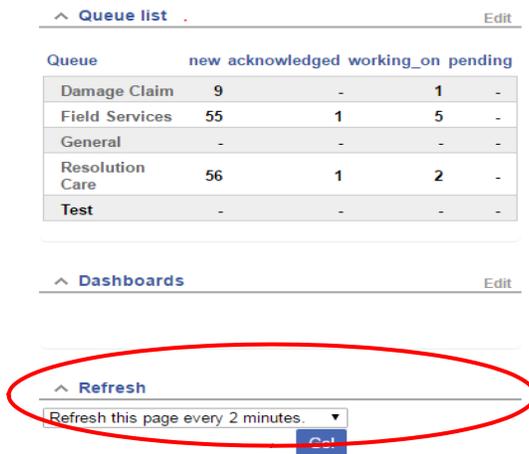2. Enter your username and password.

Optional: On your first login, make sure to change your password by going to **Settings** and **About Me.**

Change *only* your password; do NOT change any of the information under Identity.

Logged in as asenseney ▾	
Settings ▶	Preferences
Logout	About me
	Search options
	RT at a glance
	Dashboards in menu
	Queue list
	Saved Searches ▶

SET THE REFRESH INTERVAL

Every time you log into Request Tracker, set the refresh rate by choosing "Refresh this page every 2 minutes" from the drop down. This will ensure that you see new escalations and emails as they are received.

⌃ Queue list   .   Edit

Queue	new	acknowledged	working_on	pending
Damage Claim	9	-	1	-
Field Services	55	1	5	-
General	-	-	-	-
Resolution Care	56	1	2	-
Test	-	-	-	-

⌃ Dashboards   Edit

⌃ Refresh

Refresh this page every 2 minutes. ▼

Go!

QUEUES

On the RT at a Glance there are several queue lists. You can use these queues to view escalations or emails.

10 HIGHEST PRIORITY TICKETS I OWN

This queue shows the ten highest priory tickets, which represent escalations or emails that you have claimed in RT.   You can expand this to show all of your tickets by clicking in the queue name.

⌃ 10 highest priority tickets I own   Edit

#	Subject	Priority	Queue	Status
1033	Open Escalation TARGET SQUARETRADE - Job# 4357880 - GSFGSD	1	Resolution Care	new

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10 NEWEST UNOWNED TICKETS

This queue lists the ten newest tickets to populate in RT. You can click the queue name to expand this list and see all new, unowned tickets.

QUEUE LIST

The Queue List displays the tickets for each department or shared inbox in its own queue. You can click on the name of the department or inbox to view all tickets for that group.

NEW TICKET

Any new escalation opened in DOLI also opens a ticket in Request Tracker (RT). From Request Tracker we can manage the escalation queues to ensure that all orders are handled in a timely manner.

1. Click on **the subject line.**
2. From the **Actions** menu at the top of the screen, select the **Take** status.
3. From the **Actions** menu at the top of the screen, select the **Working_On** status.
4. On the next screen, click **Update Ticket**.

REQUEST TRACKER TRAINING

WORKING ESCALATION TICKETS IN REQUEST TRACKER

When you update an escalation in DOLI, the corresponding escalation must be updated in Request Tracker. This needs to be done each time so that Request Tracker has an accurate "Last Updated" Date and Time. Follow the steps below to update an escalation in RT.

1. Locate the ticket by either looking in your owned ticket queue or by searching for the ticket in RT.
2. Click on the **Subject** of the claimed ticket.

^ 10 highest priority tickets I own								Edit
# Subject	Queue	Esc_Type	Job_Number	Status	Last Updated	Territory	State	Priority
1190 Open Escalation SAMS CLUB HT - Job# 4107546 - AYERS	Damage Claim	Personal Injury Incident	4107546	new	Mon May 23 16:21:13 2016	3	GEORGIA	1

3. In the **Actions** menu, choose **Comment**.
4. Copy/Paste your DOLI job notes into the comments field.
   a. Include any follow up dates discussed with customer, Market Manager, or servicer.
5. If necessary, choose the appropriate ticket status.
6. Click on **Update Ticket**

^ Message		^ Ticket and Transaction	
One-time Cc:	☐ root (Enoch Root)	Update Type:	Comments (Not sent to requestors) ▼
One-time Bcc:	☐ root (Enoch Root)	Status:	new (Unchanged) ▼
Subject:	Open Escalation TARGET SQUARETRADE - Job# 4357880 - GSFGSD	Owner:	new (Unchanged) / new / acknowledged / working_on / pending / resolved / deleted
Message:	Search for Articles matching / Include Article: Go	Worked:	▼
	Notes go here		

STATUSES WE WILL USE

- **New**: Tickets are generated in Request Tracker with this default status.
- **Working_on**: Update the ticket with this status when you are working on the order.
- **Resolved**: This means that the ticket has been closed.

Subject:	Open Escalation hhgregg Appliances - Job# 4051682 - JACOBS

Message: Search for Articles matching [   ]

Include Article: [   ] **Go**

Attach: Drop files here or click to attach

Update Ticket

5. When the issue is resolved, close the escalation in DOLI. Please note that closing a request in Request Tracker will NOT close the escalation in DOLI. It *must* be closed in DOLI. **Once the escalation is closed in DOLI, it will close in Request Tracker.**

WORKING AN EMAIL

When an email is sent to one of CRST Home Solutions' shared email addresses from the client, customer, or service provider, a ticket is created in Request Tracker. Each agent will take ownership of the emails assigned by management and will be responsible for working each email until the issue is resolved. Request Tracker will be used to send and receive email responses.

Queue	new	acknowledged	working_on	pending
3pssups	41	21	8	-
APPDEV	44	-	11	3
BB_Client_Support	33	25	-	-
ChangeManagement	-	-	-	-
Client_Focus	4	4	-	-
clientservices	12	-	-	-
crutchfield	-	-	-	-
Custom Team	-	-	-	-
Damage Claim	4	1	92	-
damageclaims	-	2	-	-
escalations	-	-	-	-
fieldhelp	12	3	-	-
Field Services	3770	98	18	-
ForwardAir	-	-	-	-
Helpdesk	11	-	-	-
lowespaperwork	731	-	-	-
lowessupport	23	2	-	-
NALGAPPDEV	-	-	-	-
Porch	3	-	-	-
Remote Services	2	-	-	-
Resolution Care	714	2	-	-
samsung	-	-	-	-
Sunsetter_Leads	-	-	-	-

1. Click **Take** next to any new email you are assigned to work.
2. Click on the **Subject** of the email you wish to work.
3. Review the email message that displays in the History section of the ticket.

REQUEST TRACKER TRAINING

4. Review any DOLI orders and take all actions necessary to resolve the issue.
5. Respond to the email in a professional manner:
    a. Click **Reply**
        i. If you are responding to a client email with a solution, choose **"Reply."** Then, under "One-time Cc" check the box for each of the email addresses copied on the original email.

    b. Type your email response _above_ the quoted text.
    c. Click **Update Ticket** to send your email.

6. Notate all actions and phone calls in DOLI.
7. Copy/Paste the email you received into your DOLI job notes.

   Note: If the content of either email is appropriate to notate in DOLI, notate a summary of the email, include the name of the person and/or company who sent the email and the details of their request.

8. When you have completely resolved the issue presented in the email, you will update the ticket status to "Resolved."

Note: If you reply to an open email ticket in RT and the person making the request sends back a response, that email will show up under "10 Newest Unowned Tickets." This doesn't create a new ticket, but this is how RT alerts you to the new reply. When you see a response to a ticket you own, "take" it in RT.

SENDING EMAILS TO OTHER PARTIES, BUT EXCLUDING THE ORIGINAL SENDER

Anytime you use the "Reply" or "Forward" options in Request Tracker, the original sender will receive a copy of your message. There may be times you need to email a third party, but would like to exclude the original sender. To do this, use "Comment"

If you are not responding with a solution, but simply want to consult another party that was originally copied on the email, use **"Comment."** Then, under "One-time Cc" check the box next to anyone that your would like to email. This will not include the original sender on your email.
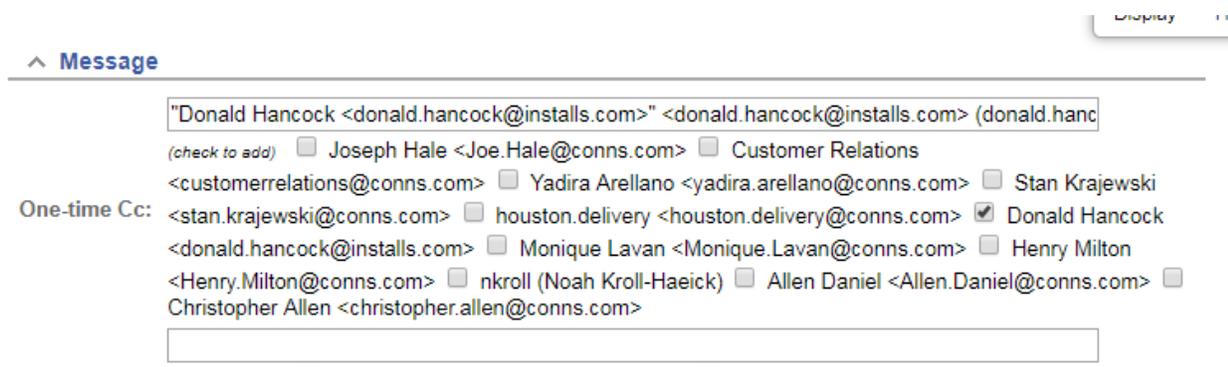
If you need to consult with someone not on the original email, but do not want to include the original sender, choose **"Comment."** The, type the email into the text field above "One-time Cc".
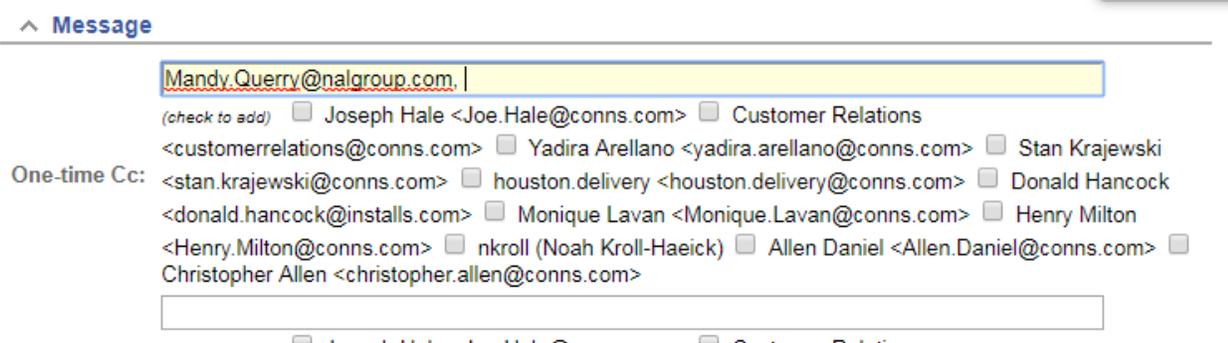

If you are unsure of whom to include on an email, consult a member of management.

REQUEST TRACKER TRAINING

**FORWARDING EMAILS TO OTHER DEPARTMENTS USING REQUEST TRACKER**

Other departments, such as Damage Claims, also use Request Tracker to manage their emails. To prevent email loops, Request Tracker will not let you use Reply or Comment to send the email to that other team.

1. Update the drop down to Referred to by
2. Set the Ticket in drop down to the new department name
3. Click Create
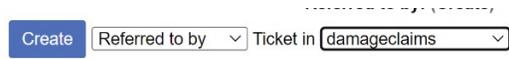
4. Enter your message to the other team in the message field
5. Click Create and a new ticket will be created in the other department's queue
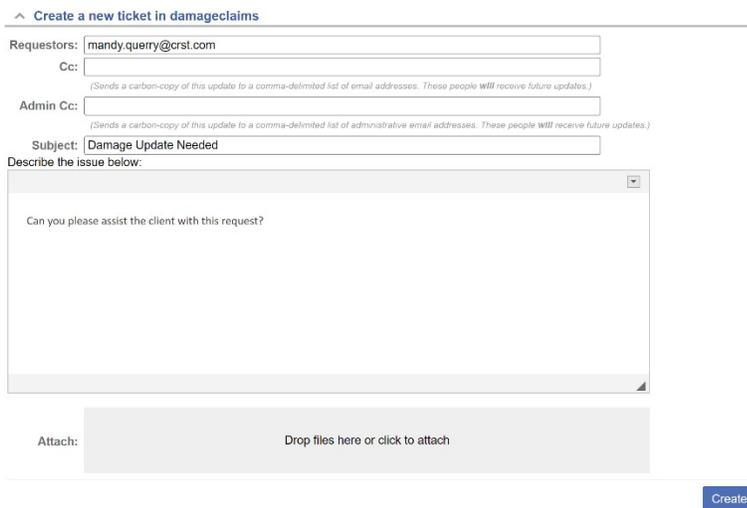
This creates a new ticket with a new ticket number in Request Tracker. The tickets will be linked together.

Update the original ticket to "Resolved" status.

ATTACHMENTS

Add attachments to your reply by either dragging and dropping the file into the **Attach** field or by clicking in the **Attach** field to open up a window that allows you to navigate to the file on your computer.
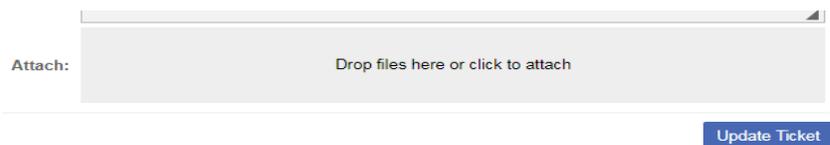
REQUEST TRACKER TRAINING

Attachments can be viewed by clicking on the file name in the "Attachments" section of the ticket. Each attachment will have a date or dates and time below it. RT saves each version of a document to allow you to see any changes between the different versions. Click on the desired version to view the document.

When using Reply or Comment, you will need to select which attachments to include in your message. At the bottom of the message composition screen, you will be able to check mark the items you wish to include in your message.

- Click **Reply** or **Comment** on the email in Request Tracker
- Check the boxes for all people that you are copying on this email
- **Check the boxes for any attachments** that are appropriate to include in your communication

- Type the body of your email
- Click **Update Ticket** and your email will be sent

SEARCHING FOR EXISTING REQUEST TRACKER TICKETS

1. To search for an existing ticket within Request Tracker, click on **Search**, select **Tickets**, then select **Simple Search**:

2. On the Simple Search screen, we can search by either the **DOLI job number** or **last name of the customer**. However, it must be placed within "**quotations**" in the search bar:
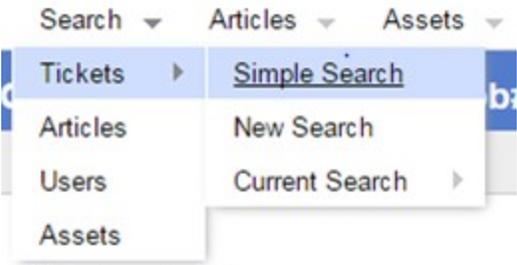
REQUEST TRACKER TRAINING

3. As an alternative to using the Simple Search option, we have the ability to **bookmark** an existing ticket for individual tracking purposes. With the ticket open, simply click the **star icon** in the upper right of the screen:

Once a ticket has been bookmarked, it will appear under the **Bookmarked Tickets** section of your home screen:

# Subject	Priority	Queue	Status	
193 Open Escalation ESTES - Job# 4043118 - NEIMEIER RT	2	Resolution Care	new	☆