Mojo Helpdesk

Guide for Agents

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What is Mojo Helpdesk?

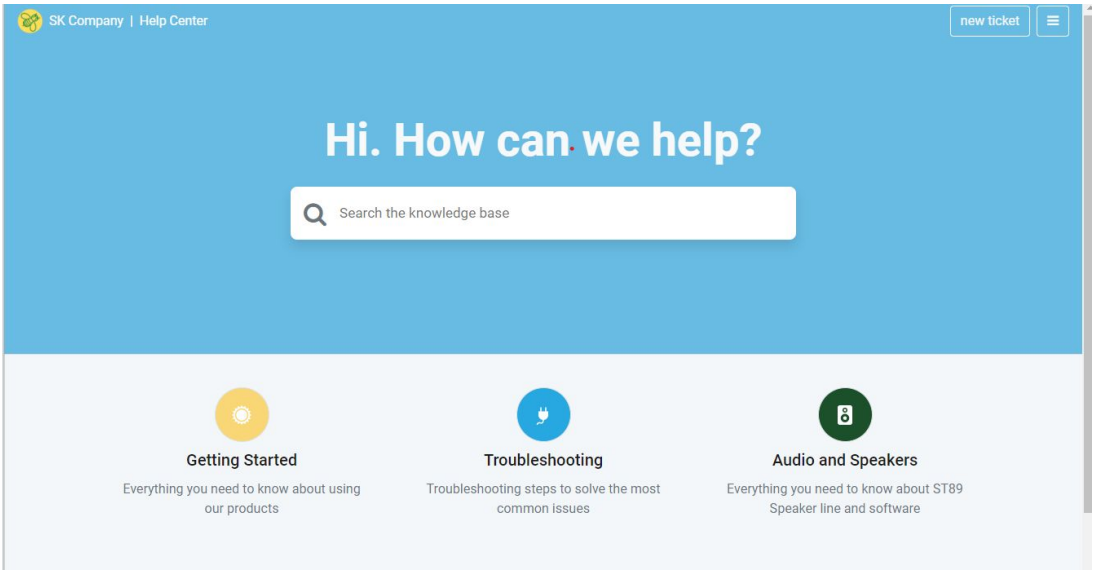
Mojo Helpdesk is an easy-to-use ticketing system that allows organizations to centralize, manage and resolve requests all in one place. Watch this video for an overview of Mojo.

[Mojo Helpdesk Overview]

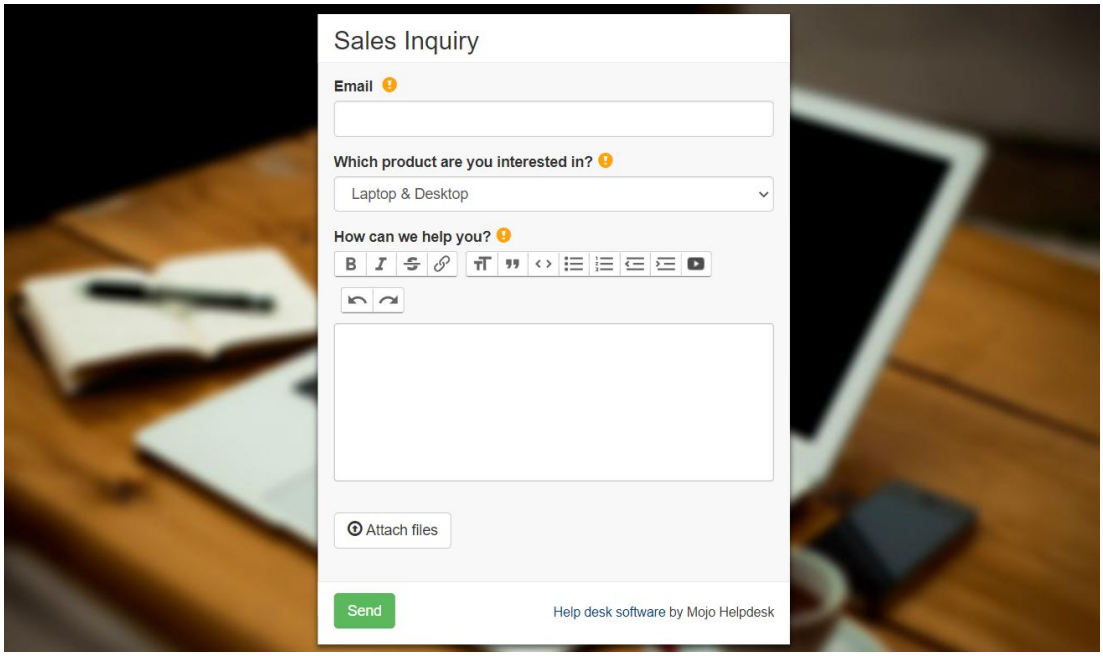
What are tickets? And how are they created?

Any request or question can be sent in to the help desk as a ticket. Contacts or customers can create a ticket in Mojo Helpdesk 3 different ways.

1. Through the Help Center

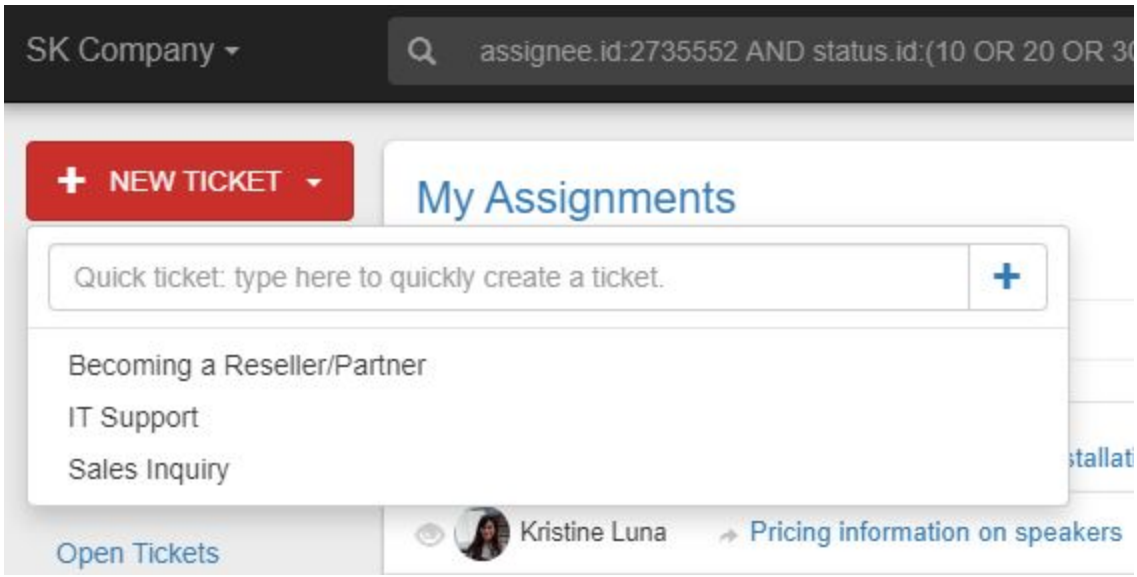


2. Through an embedded form on the organization's website (similar to this)



3. By email: a contact or customer can send email to the helpdesk and this will create a ticket

* Note: Agents can also create a ticket on behalf of a contact. That can be done in the Agent portal by clicking on the red +New Ticket button on the upper left corner.

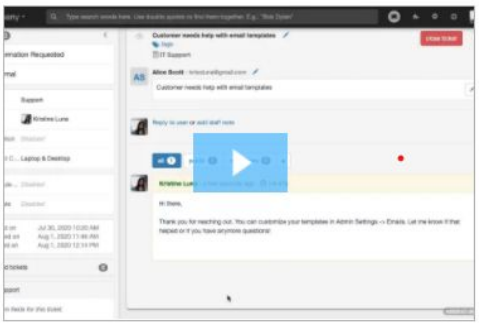


Agent Workflow

Watch this video for a walkthrough of the agent workflow. We'll also cover the following topics in this video:

- My Assignments View
- Unassigned Tickets View
- Assigning a Ticket
- Responding to a Ticket
- Using Canned Responses
- Using Ticket Statuses

[Agent Workflow and Ticket Status]



Ticket Status and Best Practices

In Mojo Helpdesk, a ticket can either be new, in progress, on hold, information requested, solved or closed. We can group these two ticket statuses in two groups. Open tickets are tickets that still need work, while resolved tickets do not require the agent's attention.

Open Tickets: Tickets in the following status are considered open and are visible in the "My Assignments" and "Open Tickets" view list

- New: The ticket has just been created.
- In progress: There is ongoing work on the ticket.
- Information requested: The agent needs more information in order to proceed working on the ticket.

- On hold: The ticket is waiting for an event to happen. No work is being done on the ticket.

Resolved Tickets: Tickets in the following status are considered resolved, and are NOT visible in the "My Assignments" and "Open Tickets" view list

- Solved: The agent has proposed a solution to the ticket submitter. If the user or ticket creator responds to the ticket, the status will go back to "in progress".
- Closed: The ticket is closed and no more work on this ticket is required. The ticket creator cannot respond to the ticket anymore.

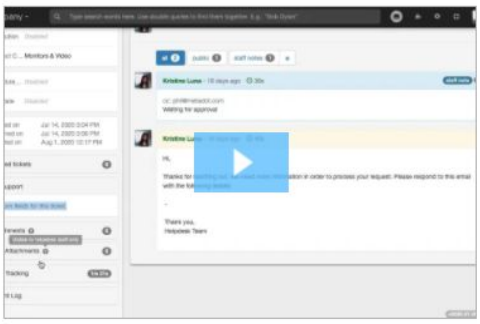
Why should agents use the "solved" status instead of "closed"?
As best practice, it is recommended that agents always solve a ticket when providing a solution, as opposed to closing the ticket. Contacts or customers are not able to respond to a closed ticket, so closing a ticket would be synonymous to putting down the phone abruptly. By keeping the ticket in "solved" status first, it gives the ticket creator/contact an opportunity to respond to the ticket. If the contact is satisfied with the agent's response, they can close the ticket. In case the contact does not take any action, an automation can update the ticket from solved to closed.

Ticket Interface Walkthrough

From a ticket view list, agents can click on a ticket to open it. In this video, we'll cover the ticket interface. Watch this video for a walkthrough of the agent workflow. We'll also cover the following topics in this video:

- Staff Notes
- Custom Fields
- Attachments
- Event Log
- Tags

[Ticket Interface Walkthrough]



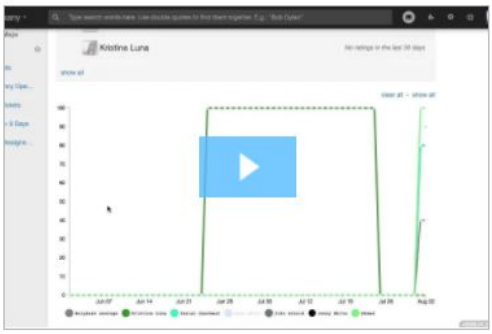
The Mojo Score and Leaderboard

What is the Mojo score?
Mojo Helpdesk calculates a Mojo score for each agent based on ticket ratings. The Mojo score is the average of rated tickets over the last 30 days.

What is the Mojo leaderboard?
The Mojo Helpdesk Leaderboard displays the Mojo scores by rank for each agent, queue and group. The Leaderboard's graph displays the Mojo scores for a specified period of time.

Watch the video below for a walkthrough of the leaderboard.

[Mojo Star and Leaderboard]

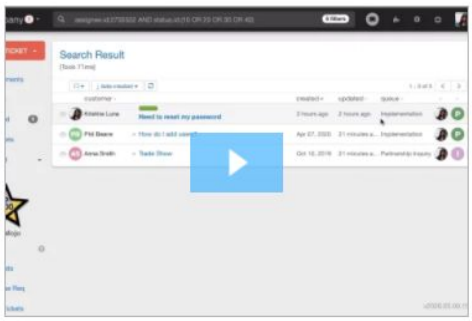


Ticket View List

The list of tickets can be customized so that it shows information relevant to the agent. Agents can choose from a compact or detailed view, what columns to display, and how data is sorted in each column.

Watch the video below for some pointers on how to customize the ticket view list.

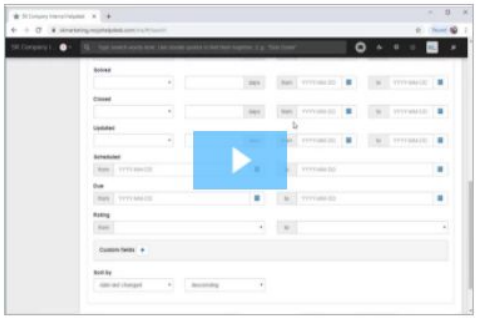
Ticket View List



Custom Views

Agents can create and save a view based on an advanced search. Agents can choose whether to share the view with other agents or to keep the view to themselves. These will be found on the lower left portion of the main page. Views are useful for creating a filtered list of important tickets (important as defined by the agent's search filters), and for executing bulk actions. Watch the video below for a walkthrough of creating a view from an advanced search.

Custom Views



Bulk Actions on Tickets

Agents are able to make changes to several tickets at one time. To do this, agents can go to a ticket view list which contains the tickets that need to be updated. Keep in mind an advanced search can be created, saved as a view, if necessary.

1. Click on the customer initials to select a ticket. Once a ticket is selected, the header row will change.
2. Select the desired action. Following are the options.
    - change status
    - change priority
    - change queue
    - add a comment
    - add a staff note
    - merge
    - manage tags
    - assign to a specific agent
    - delete

The Watch List

Agents can bookmark a ticket or sign up for updates to a ticket by adding it to their watch list. There are two ways to add tickets to the Watch List view.

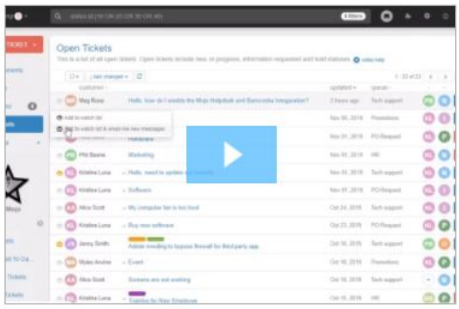
1 - Open any ticket and click the gray eyeball icon next to the ticket submitter's name near the top left of the ticket.

OR

2 - Click the gray eyeball to the left side of the customer initials of any ticket in the My Assignments, Unassigned, or All Open Tickets views.

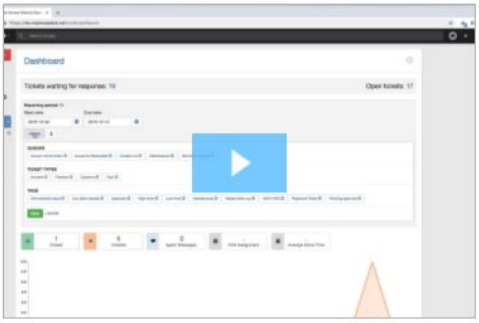
Watch the video to learn how to add a ticket to the watch list.

[The Watch List]



Ticket Tags

Ticket tags are a way to label and categorize tickets. Ticket lists can be filtered by tags and also triggers can be set up to take action on tagged tickets or to automatically add tags to tickets based on specific criteria. Only agents with managers and admins can create ticket tags by going to Admin Settings > Tags.

Managers and admins can also create a tag from the ticket itself by clicking on the tag icon. Watch the video below to see how tags can be created and added to a ticket.

[Ticket Tags]