



SmartDesk Support Portal

Client Manual

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Introduction to SmartDesk

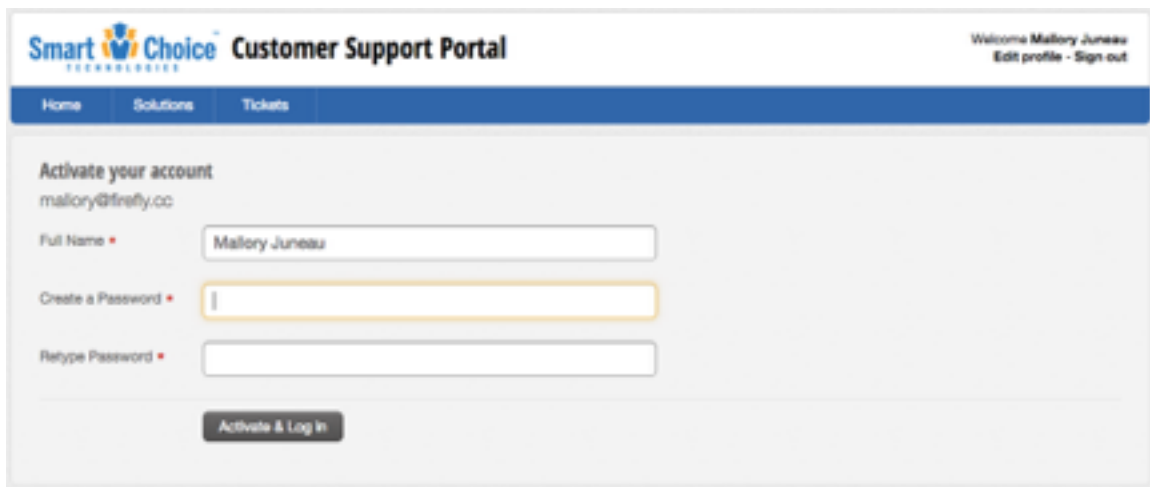
SmartDesk is Smart Choice Technology's new customer service portal. This portal will allow you to submit and manage tickets, issues, requests and more all in one place at any time of the day. In addition to ticket submission you will also have access to numerous "Solutions" helping working within the system more efficient.

You can access SmartDesk by going to <https://smartchoicetech.freshdesk.com> or <http://help.smartchoicetech.com/>

SmartDesk is for administrators of a Smart Choice system that have been formally trained by the Smart Choice team as part of their implementation.

Account Setup

If you are a current client of Smart Choice™ your account manager has already created an account for you. You will receive an email notification with a link to complete the setup of your account. Upon clicking the link in your setup email, you will be forwarded to a screen to create your password.



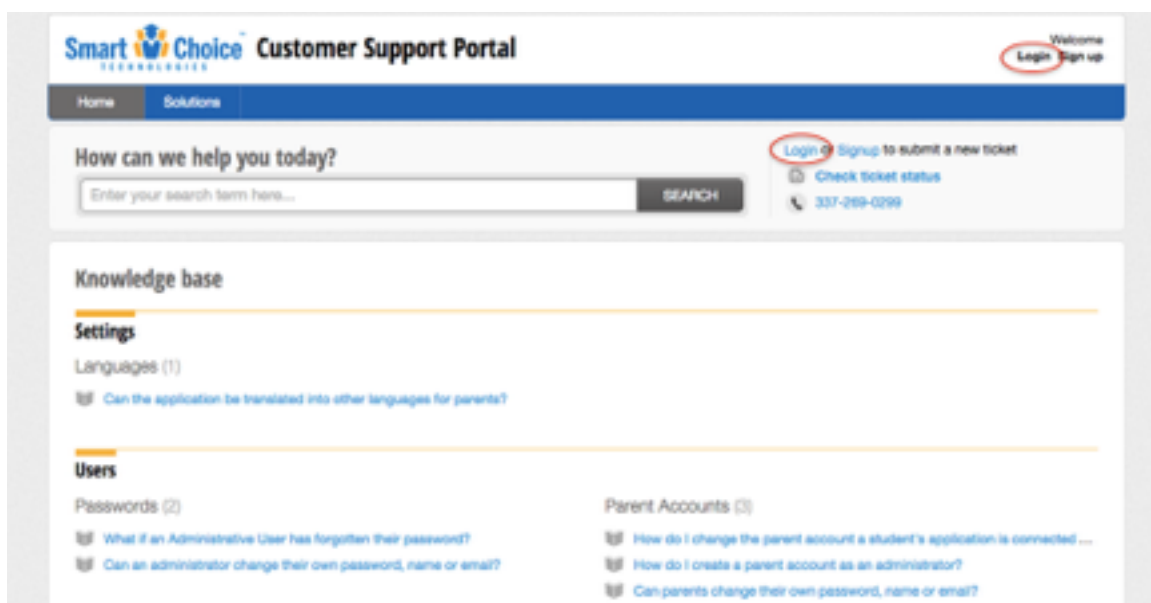
The screenshot shows the 'Smart Choice Customer Support Portal' interface. At the top right, it says 'Welcome Mallory Juneau' and 'Edit profile - Sign out'. Below this is a navigation bar with 'Home', 'Solutions', and 'Tickets'. The main content area is titled 'Activate your account' and shows the email 'mallory@frefly.cc'. There are three input fields: 'Full Name' with 'Mallory Juneau', 'Create a Password', and 'Retype Password'. An 'Activate & Log In' button is at the bottom.

Once your password is created, you will click on the “Activate & Login” button. Once logged in you will have the ability to browse solutions and submit tickets.

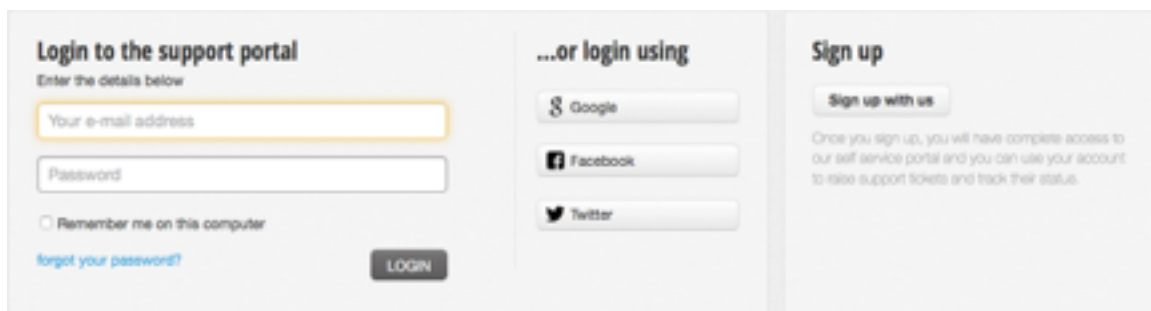
Login

Once your account has been created in the step noted above you will have the ability to login as an existing user described below.

Click the LOGIN link in the top right hand corner of the page.



Enter your email and password that you used to complete your account setup then click the LOGIN button.



Submit A Ticket Directly In SmartDesk

Once you are logged in you will have the option to submit a ticket. Click the “New Support Ticket” link at the top right of the page.

You will be presented with a simple form to fill in the details of the ticket, question or request.

Submit a ticket

Requester *









Subject *

Type *

Location of Issue *

Account Manager

This needs to be as detailed as possible. Feel free to upload screenshots to clarify. *

B I U        

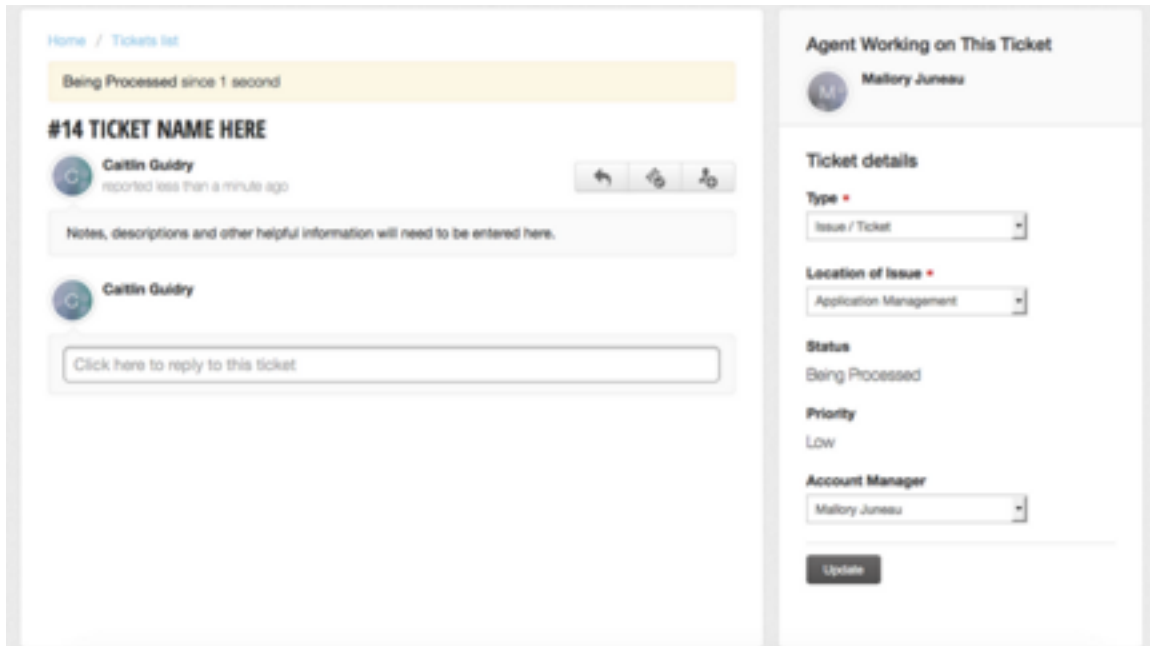
[Attach a file](#)



- Requester - This is the person submitting the request. You can leave your email in this box so that we can get back in touch with you.
- Subject - Enter in a concise subject for the ticket. This should be a descriptive subject about the issue, question or request at hand.
- Type - Select the type of ticket that you are wanting to enter.
 - Question - Select this option if you have a general query about the system, a function or feature etc.
 - Issue / Ticket - Report an issue with the system that is not working properly, you are seeing an error, etc.
 - Feature Request - An update or customization to the system that you would like to request an estimate for.
- Location of Issue - Indicate which module the ticket is referencing.
- Account Manager - Indicate the name of your Account Manager.
- Comments - This is where you will explain the details of your issue, question or request. Please be as detailed as possible to help with the timeliness of your response. Feel free to upload screenshots to clarify.

Once you complete the “Submit a Ticket” form, click the “Submit” button at the bottom of the page.

Upon submitting the ticket, you will be forwarded to an overview of the ticket that you have just submitted and you will receive an email notification confirming the submission of your ticket.



The overview will include all of the information that you entered into the previous screen as well as ticket status and priority.

Ticket Status

The status of the ticket will be updated when your Account Manager has reviewed your ticket. These status options will be a way to know where your ticket, question or request is in the process of resolution. Below you will find the possible statuses and what they mean.

- **Being Processed** - The ticket is being processed by our support team to gather needed information.
- **Assigned** - This ticket has been assigned to a support member in order to be resolved.
- **This ticket has been Resolved** - The issue has been fixed.
- **This ticket has been Closed** - The ticket has been closed since the issue was resolved.
- **Awaiting your Reply** - Our team needs more Information to complete the ticket.

Priority Of Tickets

Based on the details in the ticket, question or request, will directly drive the priority it is given. Each priority is assigned by the Account Manager once the submission has been reviewed. The priority will determine the response and resolution time as noted below.

Low - Design Issues, content changes, usability changes, requests etc.

- Response - Within 24 hours
- Resolution - Within 10 business days (depending on estimate of request)

Medium - Errors or Issues occurring that are not directly affecting the submission of applications of parent functions

- Response - Within 8 hours
- Resolution - Within 5 business days

High - One of the main modules is down and directly affecting the submission of applications or parent functions.

- Response - Within 4 hours
- Resolution - Within 2 business days

Urgent- System is down and parents are not able to submit applications - immediate turnaround within 1 to 4 hours

- Response - Within 1 hour
- Resolution - Within 1 business day

Note - All tickets will default to low priority and after evaluation by a team member will be reprioritized accordingly.

Submit A Ticket Via Email

You can also submit tickets directly from your email account. Simply send your issue, request or query to support@smartchoicetech.com. Any email sent to this address is automatically converted into a ticket and our team is notified.

When an email gets converted into a SmartDesk ticket, the subject and contents of the email become the title and description of the ticket respectively, so make sure that the subject and contents of your email are descriptive to your needs. Because you as the client, send the email, you will become the ticket requester which will allow the system to notify you of any updates to your ticket.



Responding To a Ticket

Often your Account Manager will leave a comment on your ticket or issue that will need your attention. You will receive an update via email about this comment with a link directly to the ticket in SmartDesk. You have the ability to respond to the ticket as noted below.

Directly in SmartDesk - You can reply directly in SmartDesk easily by clicking the “Reply” arrow noted below.

#16 Parent cannot login



Mallory
reported a minute ago



The parent Jane Doe is having an issue logging into the system. Can you please help?



Mallory

B *I* U

I got a little more information from the parent that may help, her login info is parent@parent.com and her password is parent123. Please let me know if you have the same issue. |

[Attach a file](#)

Reply

Cancel

- Click on Reply within the ticket.
- Type in your reply into the editor.
- Attach a file, screenshot etc if it's necessary for your explanation if required by clicking on the Choose File button. A dialog box pops up which lets you browse your computer and choose the file. Click on Open after selecting the appropriate file.
- Once done, you can click Reply to send out your reply.
- Click Cancel to revert.

Email Notifications

Staying notified on the status of the ticket is the most important part of effective ticket management. You as the ticket submitter or requestor will receive a series of email notifications throughout the process, these emails are detailed below.

User Activation Email - When an account has been created for you, an email will be sent to the email on file for you to activate your account. Once you click the link in the email, you will be brought to the Customer Support Portal where you can create your password for future logins.

Password Reset Email - Should you forget your password you can choose to have an email sent to the account on file in order to reset the password. The email will include a link. Once you click the link, you will be brought to the Customer Support Portal where you can reset your password.

New Ticket Received - Upon submitting the ticket, you will receive an email informing you that your ticket has been submitted, received and that your Account Manager will be reviewing your request and will send you a personal response to gather more information or provide an update, usually within 24 hours. To view the status of the ticket or add comments, please visit the URL listed within the email.

Agent Adds Comment to Ticket - When your Account Manager or another member of our support team responds to the ticket, you will be notified by email. You can click the link within the email to review the ticket and comments and respond. The response will also be included in the email for your review.

Agent Solves the Ticket - When your Account Manager or another member of our support team resolves the ticket, you will be notified by email. If you believe that the ticket has not been resolved, please reply to this email to automatically reopen the ticket with additional information. If there is no response from you, we will assume that the ticket has been resolved and the ticket will be automatically closed after 48 hours.

Agent Closes the Ticket - When your Account Manager or another member of our support team deems that the ticket is complete, he/she will close the ticket. If you feel that the ticket should not be closed or if the ticket has not been resolved, please reply to this email.

