Campus Management System (CMS)

Training Manual

Of

COMPLAIN MODULE

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Revision Chart

Primary Author(s)	Description of Version	Date Completed
M Awais Raza	Initial Draft	09th-May- 2023
Hamid Raza	Reviewed the document	09th-May- 2023

Table of Contents

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Module:- Complain

Complain module includes all details like configurations, help desk team, types, stages, tickets and reporting. Details are given below. Icon of complain module is given below;
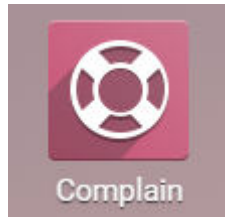
Process Name-: Create Help Desk Teams

Click on the configuration menu and see sub menus like help desk teams, types, stages and SLA policies. Details are given below;

Navigation-:

Complain Module ⟶ Configuration (Menu) ⟶ Help Desk Teams (Sub Menu)

Description:
- Click on the Help Desk Teams menu and create it.
- Fill credentials like name, some check boxes of assignment & visibility, some check boxes of channels, some check boxes of track & bill time and some check boxes of performance/self service/after-sales.
- As per policy fill credentials carefully. Then press save button.
- Tickets and SLA policies menus are visible in top right of page (just click and see details).
- Through export option you can export all data.
- Dashboard of Help Desk Teams menu, you can see details and search any Help Desk Teams through search bar and through filter.
- List and kanban views are also visible in the dashboard (just click and see details).
- Diagram is given below;

Just Click

Helpdesk Teams / Customer Care

SAVE   DISCARD

1 / 1   < >

0 Tickets

0 SLA Policies

Name

Customer Care

Description for customer portal

Assignment & Visibility

Assignment Method
Assign new tickets to the right persons

○ Manual
○ Random
○ Balanced

Team Visibility
Users to whom this team will be visible

○ All Users
○ Invited Users

Channels

No Filter

Views

Helpdesk Teams

CREATE ⬇

Search

▼ Filters ≡ Group By ★ Favorites

1-1 / 1 < > ☰ ⊞

☐   **Name**   **Alias email**   ⋮

☐ ⬍ Customer Care

Process Name-: Create Types

Click on the configuration menu and see sub menus like help desk teams, types, stages and SLA policies. Details are given below;

Navigation-:

Complain Module ⟶ Configuration (Menu) ⟶ Types (Sub Menu)

Description:

- Click on the Types menu and create it.
- Just enter name and press save button.
- Through export option you can export all data.
- Dashboard of Types menu, you can see details and search any Types through search bar and through filter.
- Diagram is given below;

Filter

Types

Created on: Month ✕ Search... 🔍

▼ Filters ≡ Group By ★ Favorites 1-1 / 1 ‹ ›

☐ Name

▶ January 2023 (2)

Group By dropdown:
Created by
Created on ▸
Created on ▸
✓ Created on ▸
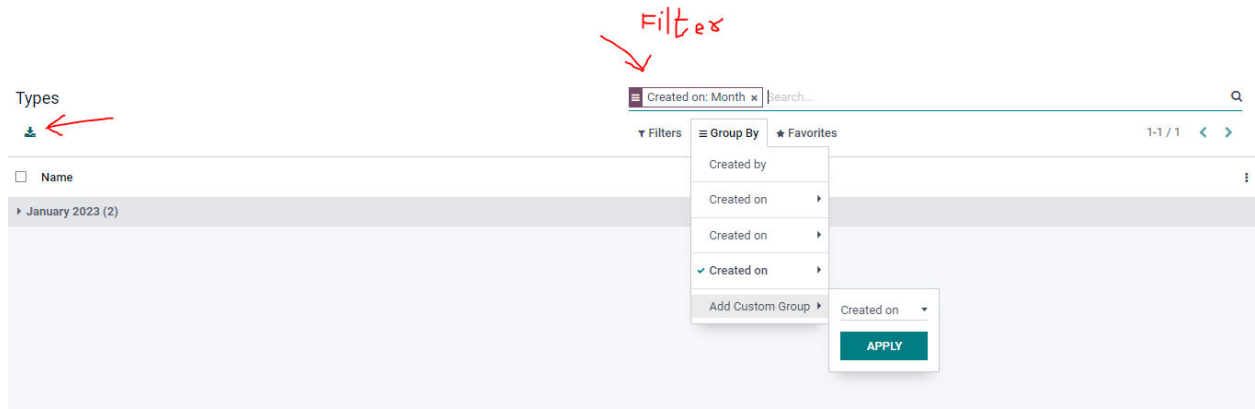Add Custom Group ▸ Created on ▾
APPLY

Process Name-: Create Stages

Click on the configuration menu and see sub menus like help desk teams, types, stages and SLA policies. Details are given below;

Navigation-:

Complain Module ⟶ Configuration (Menu) ⟶ Stages (Sub Menu)

Description:

- Click on the stages menu and create it.
- Fill credentials like stage name, closing stage, description and select help desk teams (as we created before).
- Set different stages like ready, in progress, blocked (as per color). Also have an option to enter descriptions. Then press save button.
- Through action button, you can delete it.
- **Bold lines are compulsory to fill and others are optional.**
- Through export option you can export all data.
- Dashboard of stages menu, you can see details and search any stages through search bar and through filter.
- List and kanban views are also visible in the dashboard (just click and see details).
- Diagram is given below;

Stages / New

SAVE   DISCARD   1 / 4 ‹ ›

Name	New
Email Template	Ticket: Reception Acknowledgment

Closing Stage ☐
Folded in Kanban ☐
Helpdesk Teams [Customer Care ✕]

Stage Description and States Meaning

Add a description to help your coworkers understand the meaning and purpose of the stage.

Add a description...

At each stage, employees can block tickets or mark them as ready for the next step. You can customize the meaning of each state.

○ In Progress
● Blocked
● Ready

---

views

Stages

CREATE ⬇   Search...   🔍

                                    ▼ Filters ≡ Group By ★ Favorites   1-4 / 4 ‹ ›   ☰ ⊞

☐		Name	Helpdesk Teams	Folded in Kanban	⋮
☐	⇕	New	[Customer Care]	☐	
☐	⇕	In Progress	[Customer Care]	☐	
☐	⇕	Solved	[Customer Care]	☑	
☐	⇕	Cancelled	[Customer Care]	☑	

Process Name-: Create SLA Policies

Click on the configuration menu and see sub menus like help desk teams, types, stages and SLA policies. Details are given below;

Navigation-:

Complain Module ⟶ Configuration (Menu) ⟶ SLA Policies (Sub Menu)

Description:

- Click on the SLA Policies menu and create it.
- Fill credentials like name, description, select help desk team, select reach stages, select type/tag/customer and excluding stage. Then press save button.
- Dashboard of SLA Policies menu, you can see details and search any SLA Policies through search bar and through filter.
- List and kanban views are also visible in the dashboard (just click and see details).
- **Bold lines are compulsory to fill and others are optional.**
- Diagram is given below;

SLA Policies / New

SAVE DISCARD

e.g. Close urgent tickets within 36 hours

Description of the policy...

Criteria

Helpdesk Team	Customer Care
Minimum Priority	☆ ☆ ☆
Type	Question
Tags	
Customers	Aaliya Haider ✕

Target

Reach Stage	
In	00:00 Working Hours
Excluding Stages	

Process Name-: Create My Tickets

Click on the Tickets menu and see sub menus like my tickets and all tickets. Details are given below;

Navigation-:

Complain Module ⟶ Tickets (Menu) ⟶ My Tickets (Sub Menu)

Description:

- Click on the My Tickets menu and create it.
- Fill credentials like subject, select help desk team, select customer/type/tags, set priority and add descriptions.
- Some states are visible in top right of page (states are new, in progress, solved and cancelled), after your submission it will be change.
- Then press save button.
- Dashboard of My Tickets menu, you can see details and search any My Tickets through search bar and through filter.
- List and kanban views are also visible in the dashboard (just click and see details).
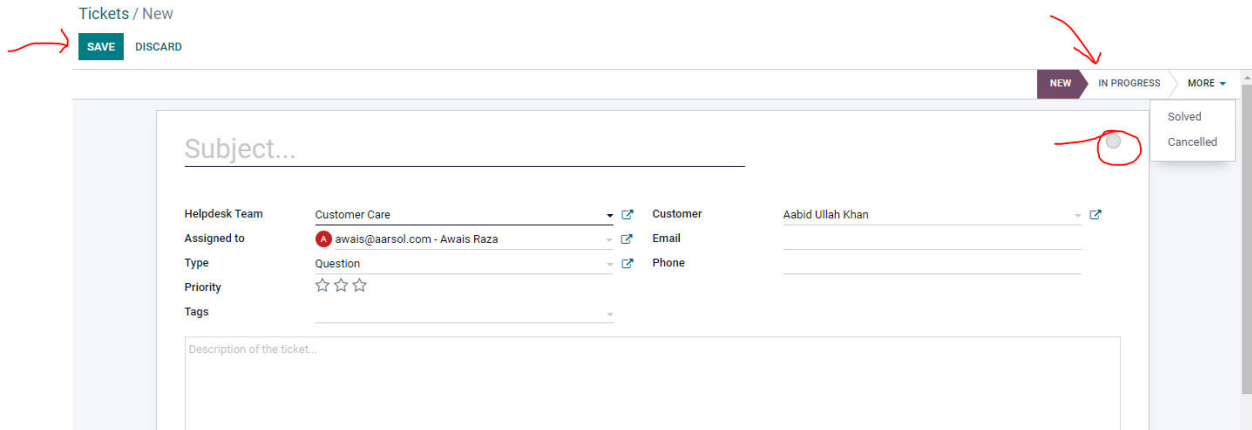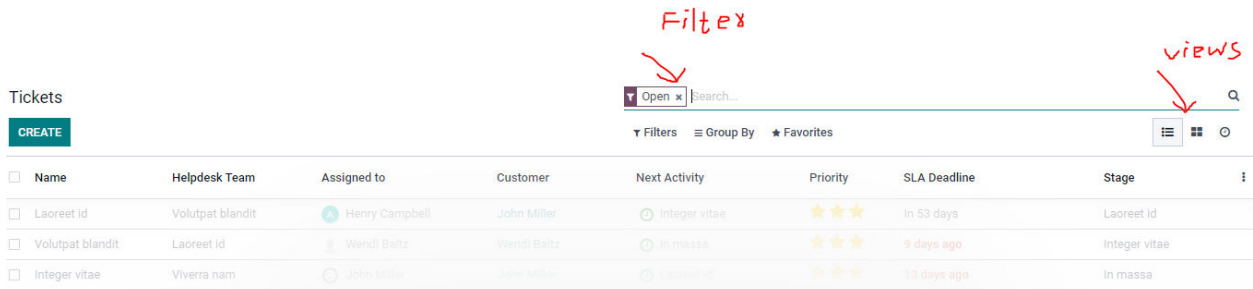- Diagram is given below;

Process Name-: All Tickets (See Details)

Click on the Tickets menu and see sub menus like my tickets and all tickets. Details are given below;

Navigation-:

Complain Module ⟶ Tickets (Menu) ⟶ All Tickets (Sub Menu)

Description:

- Click on the All Tickets menu and see details (also have an option to create it).
- Fill credentials like subject, select help desk team, select customer/type/tags, set priority and add descriptions.
- Some states are visible in top right of page (states are new, in progress, solved and cancelled), after your submission it will be change.
- Then press save button.
- Dashboard of All Tickets menu, you can see details and search any Tickets through search bar and through filter.
- List and kanban views are also visible in the dashboard (just click and see details).
- Diagram is given below;

Process Name-: Ticket Analysis (Reporting)

Click on the reporting menu and see sub menus like ticket analysis, SLA status analysis and customer rating. Details are given below;

Navigation-:

Complain Module ⟶ Reporting (Menu) ⟶ Ticket Analysis (Sub Menu)

Description:

- Click on the Ticket Analysis menu and see details.
- Click on the events (for reporting) menu and see details.
- You have an option to insert in spreadsheet. Click insert and enter details (see diagram).
- Click on measure button and see details (following option is here, hours open, hours to assign, rating (just click on it and see details).
- All data are visible in the dashboard of Ticket Analysis.
- Through download xlsx, you can download it. Flip axis and expand all option are also available.
- Through filter you can search any details (click on group by and apply filter).
- Pivot view and cohort view are available in dashboard.
- Diagram is given below;
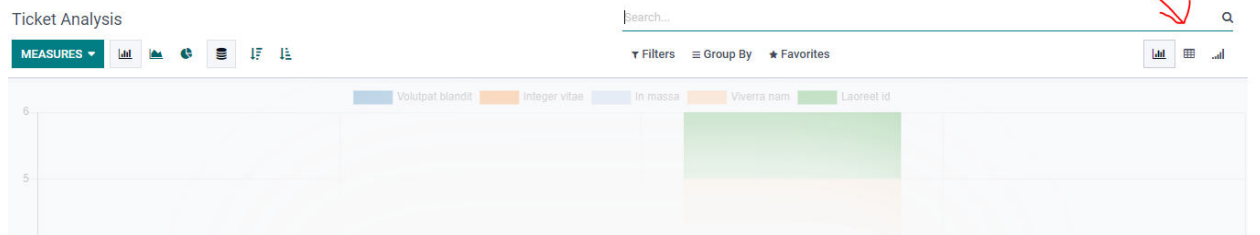

Process Name-: SLA Status Analysis (Reporting)

Click on the reporting menu and see sub menus like ticket analysis, SLA status analysis and customer rating. Details are given below;

Navigation-:

Complain Module ⟶ Reporting (Menu) ⟶ SLA Status Analysis (Sub Menu)

Description:

- Click on the SLA Status Analysis menu and see details.

- You have an option to insert in spreadsheet. Click insert and enter details (see diagram).
- Click on measure button and see details (following option is here, days to reach SLA, open hour, SLA status failed, Ticket failed, time to close and count (just click on it and see details).
- All data are visible in the dashboard of SLA Status Analysis.
- Through download xlsx, you can download it. Flip axis and expand all option are also available.
- Through filter you can search any details (click on group by and apply filter).
- Pivot view and graph view are available in dashboard.
- Diagram is given below;

Process Name-: Customers Rating (Reporting)

Click on the reporting menu and see sub menus like ticket analysis, SLA status analysis and customer rating. Details are given below;
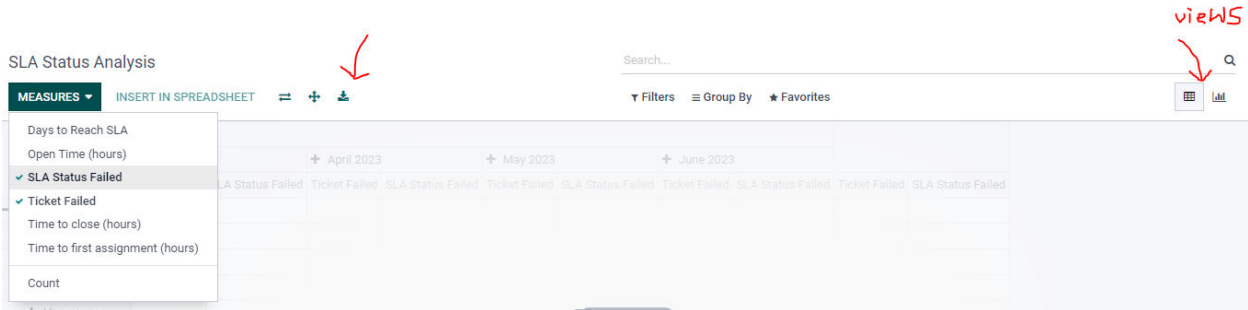
Navigation-:

Complain Module ⟶ Reporting (Menu) ⟶ Customers Rating (Sub Menu)

Description:
- Click on the Customers Rating menu and see details.
- All data are visible in the dashboard of Customers Rating.
- Through download xlsx, you can download it. Flip axis and expand all option are also available.
- Through filter you can search any details (click on group by and apply filter).
- Pivot view, graph view, kanban view and list views are available in dashboard.
- Diagram is given below;

views

Customer Ratings

Search...

▼ Filters ≡ Group By ★ Favorites

by Henry Campbell for on 04/29/2023 17:49:44	by Carrie Helle for on 05/27/2023 04:49:44	by Wendi Baltz for on 06/18/2023 21:49:44	by John Miller for on 05/10/2023 08:49:44
by Henry Campbell for on 06/23/2023 21:49:44			by John Miller for on 04/27/2023 15:49:44
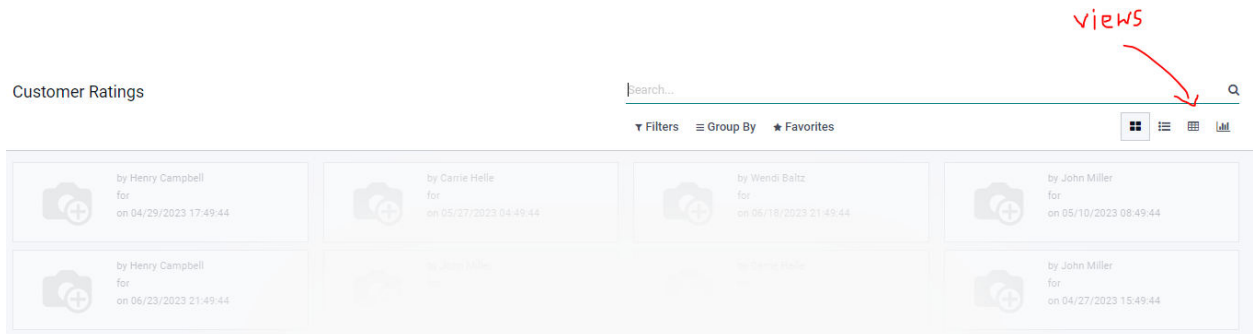
Process Name-: Overview

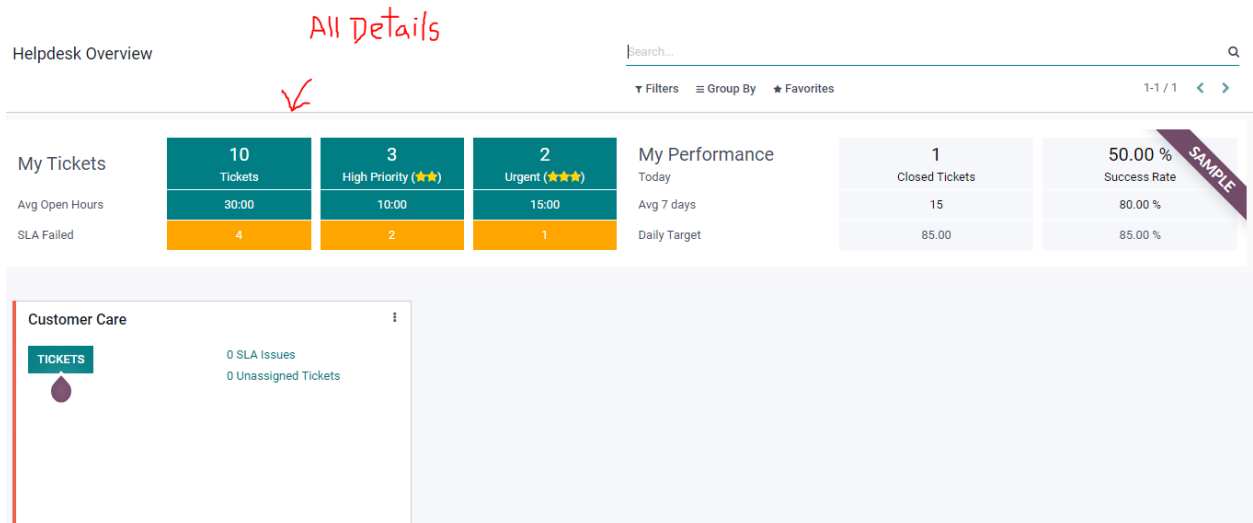Click on the Overview menu and see details. Details are given below;

Navigation-:

Complain Module ⟶ Overview (Menu)

Description:

- Click on the Overview menu and see details.
- All types of detail are visible in dashboard like tickets details, SLA failed, Avg open hours, my performance, daily target, last 7 days and customer care details.
- Through filter you can search any details (click on group by and apply filter).
- Diagram is given below;

All Details

Helpdesk Overview

Search...

▼ Filters ≡ Group By ★ Favorites   1-1 / 1 ‹ ›

My Tickets	10 Tickets	3 High Priority (★★)	2 Urgent (★★★)	My Performance Today	1 Closed Tickets	50.00 % Success Rate
Avg Open Hours	30:00	10:00	15:00	Avg 7 days	15	80.00 %
SLA Failed	4	2	1	Daily Target	85.00	85.00 %

SAMPLE

Customer Care ⋮

TICKETS

0 SLA Issues
0 Unassigned Tickets

THE END