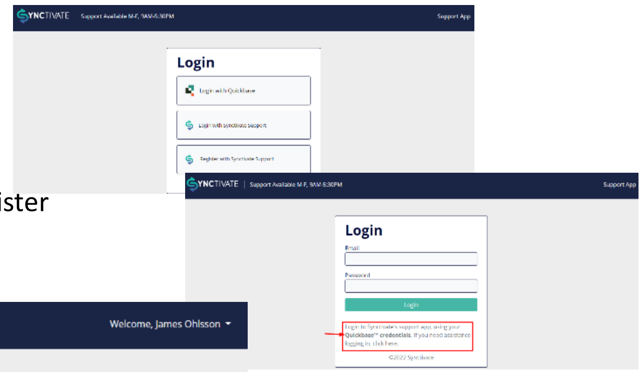
# SYNCTIVATE

# Support Ticketing Platform

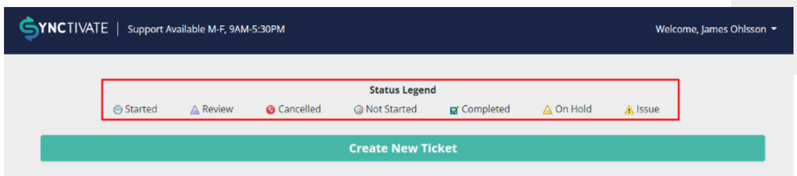
Welcome to Synctivate's Support Tracker! Below you will find instructions with accompanying illustrations to assist with the process of entering support tickets and communicating with our agents.




A. Logging In

To get started, choose how you'll be logging in. In most cases, you'll simply use your Quickbase credentials. There is also an option to register outside of Quickbase if preferred but may require assistance.

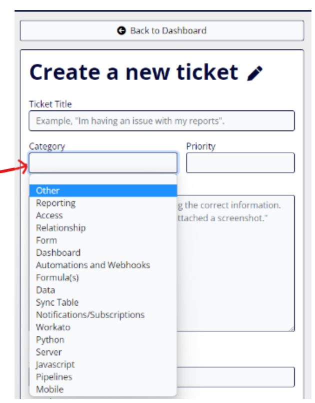
B. Main Screen




Once logged in, you'll notice a Status Legend near the top of the page. These icons represent the status of each ticket submitted. To get started with your first ticket, click 'Create New Ticket'.

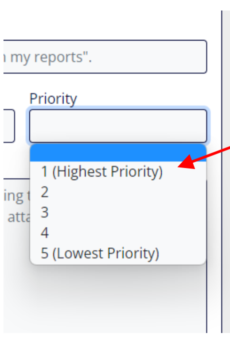
C. Ticket Creation

Here's where the details of the ticket will be entered.

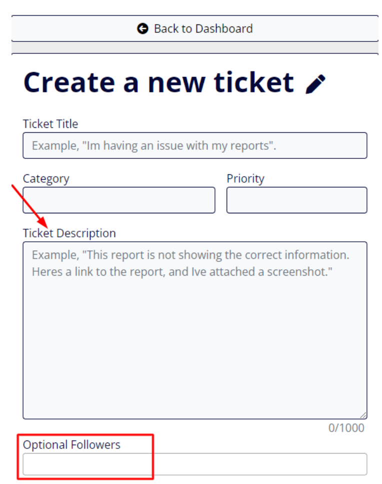



i. Enter the Ticket Title. In a few words, the title should give our agent a general idea of the issue.

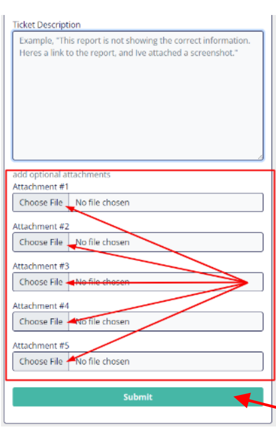
ii. Select a category from the drop-down list that best fits the issue at hand.




iii. Choose a Priority that corresponds with the urgency of the issue. The highest priority, 1, would typically indicate an emergency that would need immediate attention. When triaging multiple tickets at any given time, our agents will work on tickets with higher priority before those with lower.



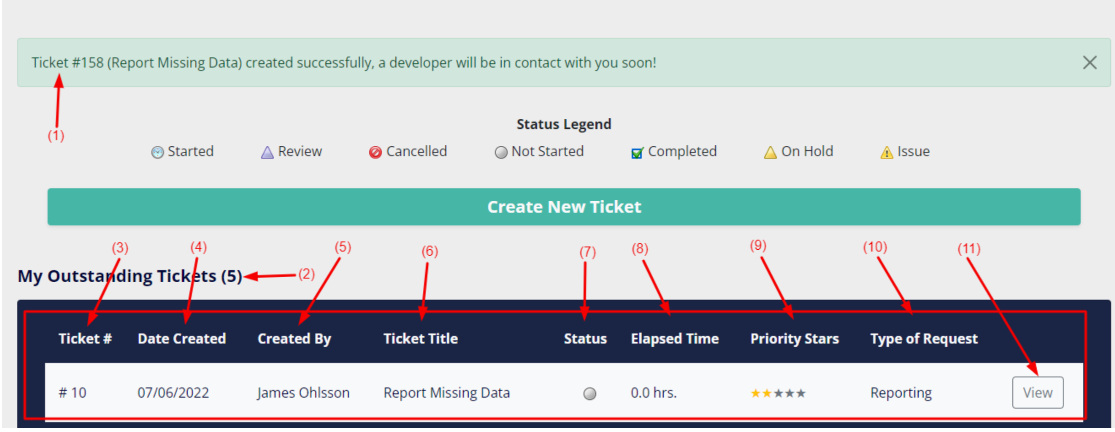

iv. Enter a description of the issue. We ask that you provide as much detail as possible here, so that our agents are well-equipped to get started with completing the task/resolving the issue. Names of apps/tables/reports, RIDs, field names, and even direct links to any of the above are all helpful to have. In the following step, you'll be able to add images to help us understand the issue even further. Select other users, or "followers", if they should be included on this issue.




v. As stated above, finally, you'll have the option to upload some supporting documents or images. We currently allow for up to five attachments on any given ticket.

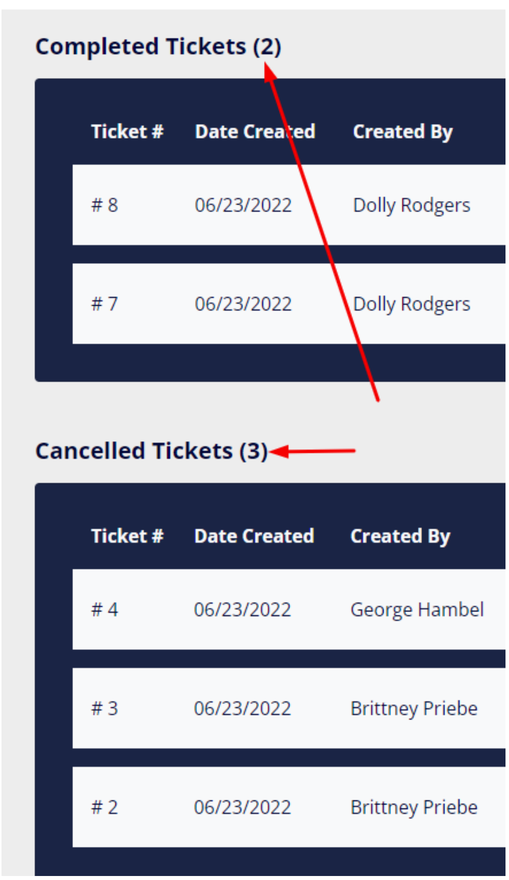
Once attachments have been uploaded, click 'Submit' to send the ticket to our agents.

D. Ticket Info Overview




1. This is confirmation that your ticket was created successfully.
2. This section contains all tickets created that are pending completion.
3. Each ticket is assigned a unique number, listed in left-most column.
4. The date on which the ticket was created is listed next.
5. The user by whom the ticket was created is indicated here.
6. The ticket title is displayed here, followed by the:
7. Current status of the ticket (refer to legend if needed),
8. Amount of time since ticket was created,
9. Priority originally indicated by the ticket owner,
10. The category that was chosen,
11. And finally, a button that takes you to the 'ticket-view' screen.

E. Status Grouping

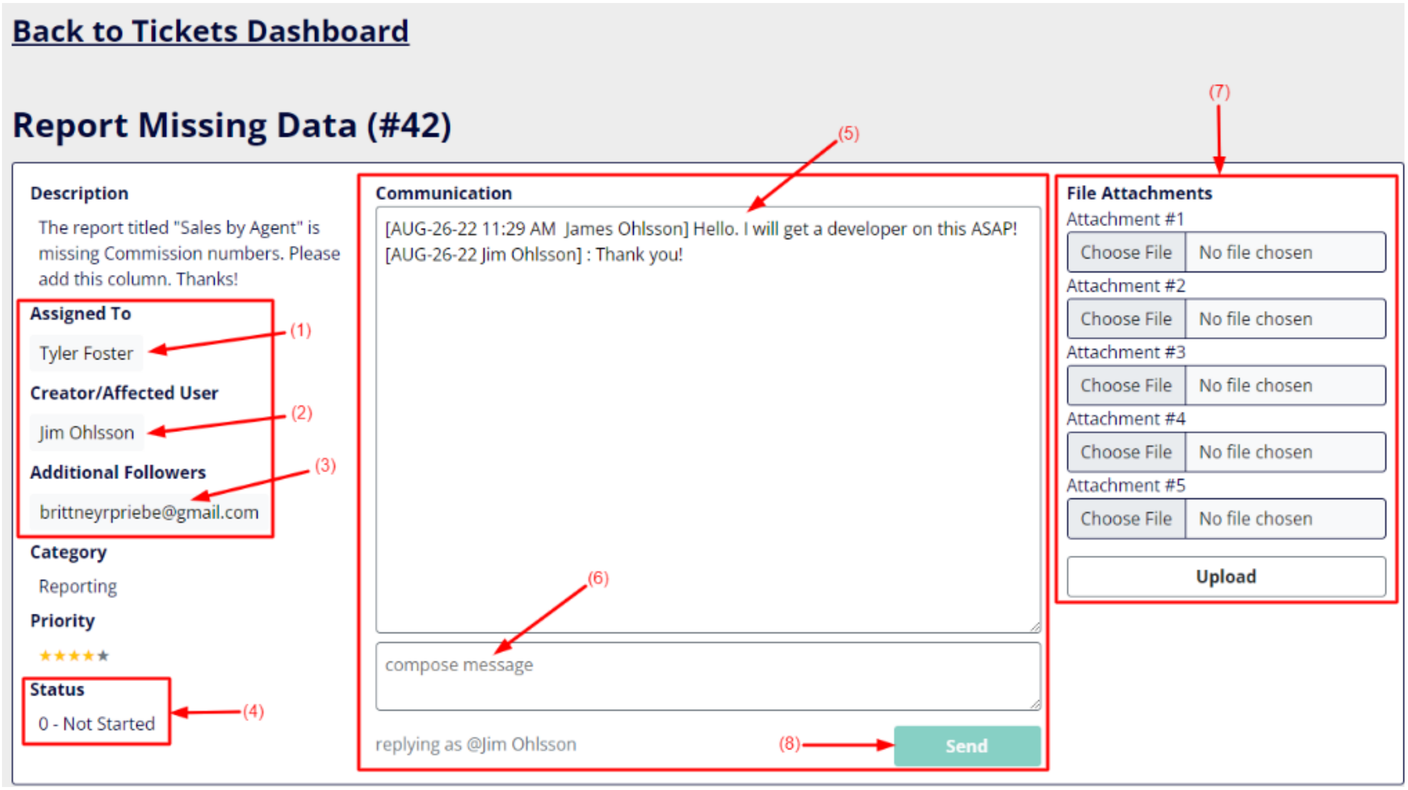



On the main Ticket Info Overview screen, the tickets are grouped by current status. In addition to the Outstanding Tickets that are currently being worked on, any ticket that has already been completed or cancelled will appear in their respective sections below.

Once a ticket has been completed or cancelled, you will no longer be able to enter communications on that ticket. If you'd like a ticket to be re-opened for any reason, please reach out to us via email and we can assist with that on our end.

F. Ticket Detail Screen

Upon clicking on a ticket to drill into it, you'll be presented with the following screen:




1. This is the Synctivate agent that has been assigned.
2. This is the user that created the ticket.
3. If additional members of your organization were chosen as followers, they will appear here.
4. This will change as the status of the ticket is changed by our agents.
5. This section will log the communication between the ticket creator and our staff.
6. To send a new message to Synctivate, simply type in the field here.
7. If any attachments need to be added as the triaging progresses, the user can choose an available field here and add helpful files for the agent.
8. Once all communications are entered/added, smash that send button to alert our crew!

G. Additional Features

a. One or more users from your organization can have the ability to view *all* tickets entered by *all* members of your team. Simply let us know if anyone should qualify for this.

b. One or more users may also choose to receive *every* notification for *all* tickets (ticket status change, new message from Support). Again, let us know if this should apply to anyone.