

TICKET365

Overview

Ticket365 is an add-on feature of Dynamics 365 CRM which is aimed to give control of the tickets to the end users rather than depending on various ticket management systems used by their various service providers. This also builds the Knowledge base within their Dynamics 365 CRM

Ticket 365 Benefits:

- Single place for logging tickets
- Easy monitoring and control
- Knowledge base
- Dashboards

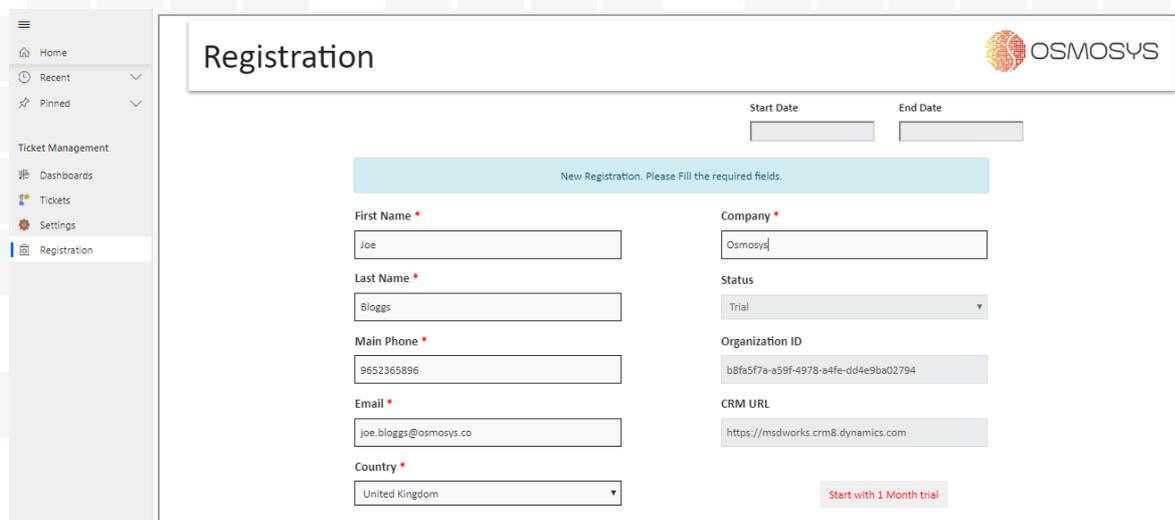
Important:

You need to be a System Administrator to access the app and deploy on to your Dynamics environment

Ticket 365 Registration

After Ticket365 has been added to the Dynamics 365 instance, navigate to Ticket 365 App and select “Registration”

Enter the details and select for 1 month trial

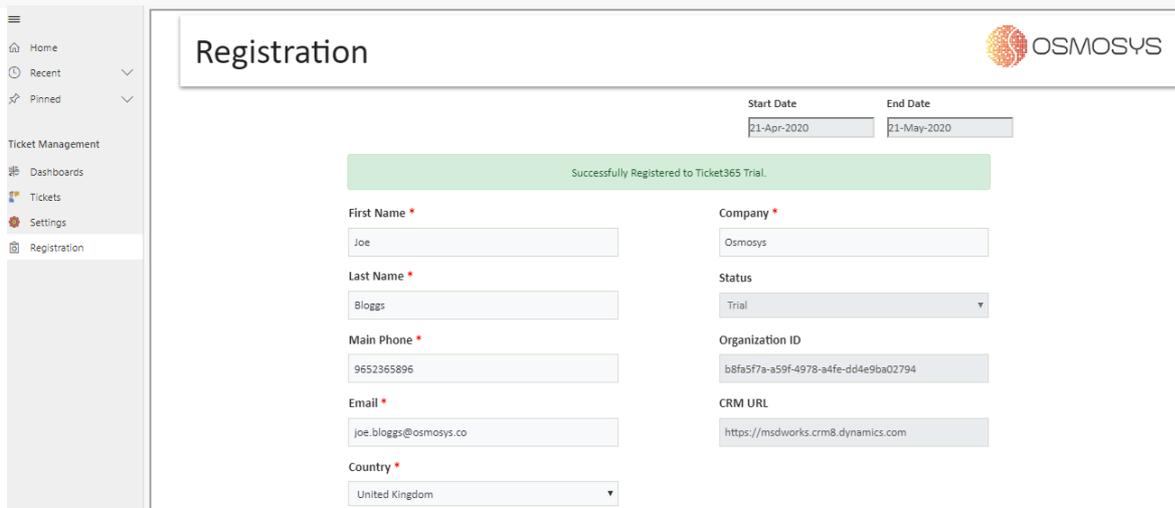


The screenshot shows the 'Registration' form in the Ticket365 app. The form is titled 'Registration' and includes the OSMOSYS logo in the top right corner. Below the title, there are two date pickers for 'Start Date' and 'End Date'. A blue banner reads 'New Registration. Please Fill the required fields.' The form is divided into two columns of fields:

- Left Column:**
 - First Name ***: Input field with 'Joe' entered.
 - Last Name ***: Input field with 'Bloggs' entered.
 - Main Phone ***: Input field with '9652365896' entered.
 - Email ***: Input field with 'joe.bloggs@osmosys.co' entered.
 - Country ***: Dropdown menu with 'United Kingdom' selected.
- Right Column:**
 - Company ***: Input field with 'Osmosys' entered.
 - Status**: Dropdown menu with 'Trial' selected.
 - Organization ID**: Input field with 'b8fa5f7a-a59f-4978-a4fe-dd4e9ba02794' entered.
 - CRM URL**: Input field with 'https://msdworks.crm8.dynamics.com' entered.

At the bottom right of the form, there is a red button labeled 'Start with 1 Month trial'.

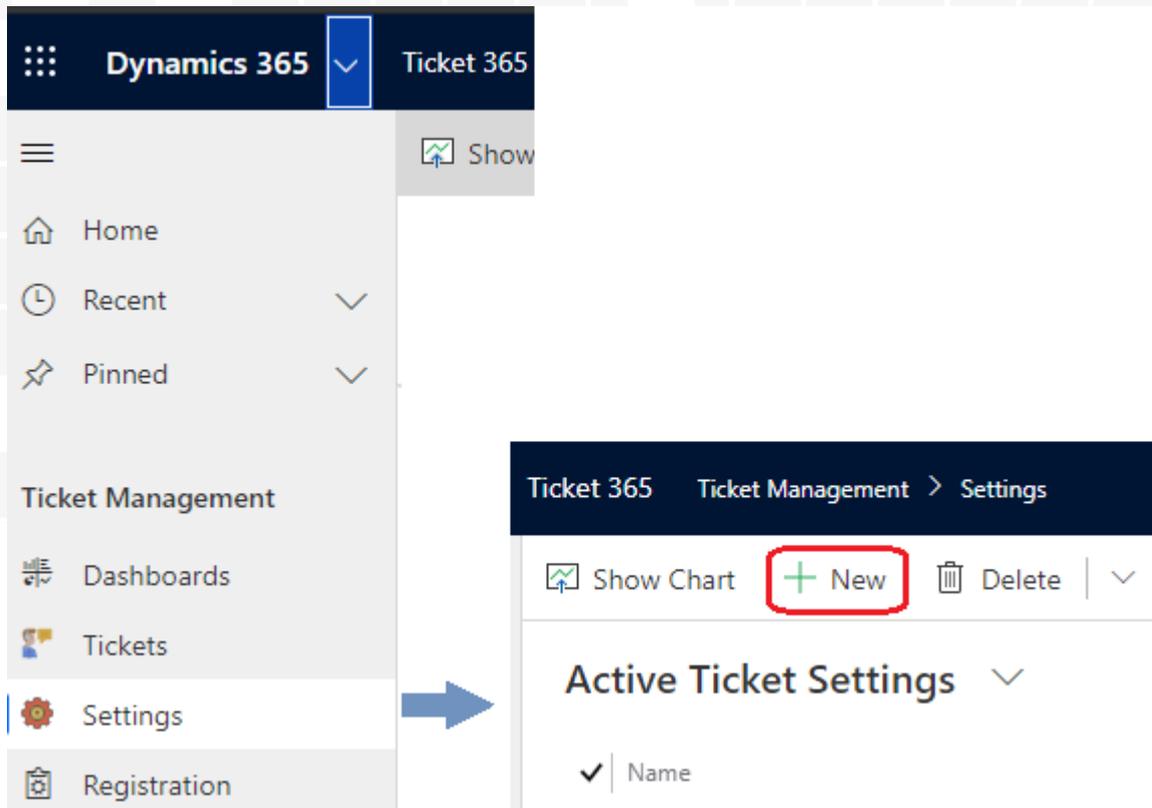
If successfully registered, the Start and End Dates of the trial period would be populated



After the trial, users can extend the registration period by buying the product using the same Registration page

Ticket 365 Configuration

After Ticket365 has been added to the Dynamics 365 instance, navigate to Ticket 365 App and select "Settings"



Click on '+New' to create the Configuration record

Name: Identifier for the configuration setting record

Support User: CRM User record given/allotted for the service provider

Notification Type: Email

Email Sender: Email address from which the Support ticket email has to be sent

Email Recipient: Email address of your support service provider to send the ticket email to

CRM Email: Yes/No

***Yes Indicates, email would be sent from within CRM. This would work only if the respective CRM instance has the Email Integrated to their CRM*

***When CRM Email = No is selected, system prompts for more details*

Support Email Configuration

Ticket Setting

General Related

| | |
|-------------------|--|
| Name | * Support Email Configuration |
| Support User | *  IT Support |
| Notification Type | Email |
| Email Sender | crm.admin@csservices.co |
| Email Recipient | support@osmosys.co |
| CRM Email | No |
| Email Server | * smtp-mail.outlook.com |
| Outgoing Port | * 587 |
| SSL Enabled | * Yes |
| Password | * |

Email Server: outgoing email server address

Outgoing Port: mail server's outgoing port

SSL Enabled: mail server's SSL status

Password: password of the email address entered under "Email Sender"

***Ensure there is a single record for each Notification Type. If multiple records are created, the most recent created record will be considered as the applicable settings record*

End User Experience

For CRM Users to have access to Ticket365, ensure the users are given either Ticket365 Administrator or Ticket365 User role

When a User creates a ticket record, based on the Configuration settings an email is sent to the support user/service provider

SharePoint documents not showing up in CRM

Support Ticket

1.00
Total Hours

General Related

Issue * SharePoint documents not showing up in CRM

Issue# 00001097

Description * SharePoint documents are not shown in CRM under Documents for Account "AD Works", remaining all records are fine but not this

Created On 05-03-2020 14:56

Raised By * IT Support

Impact * Random (Issue is noticed sometimes)

User Details james.h@csservice.co

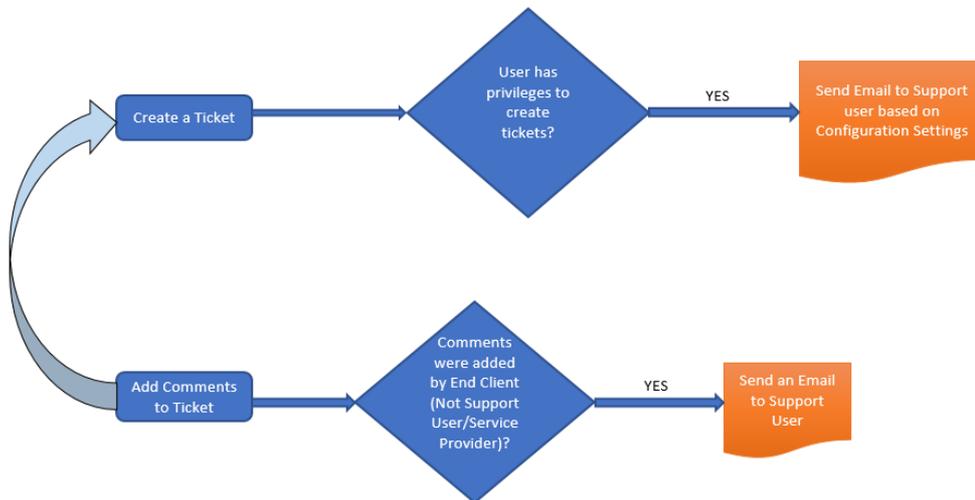
Issue Attachment Choose File No file chosen Save

Timeline

Enter a note...

- Comments by IT Support
There are duplicate accounts for Ad Works
1.00
- Message from James
This issue is not for single record but is random and majorly noticed when all users are on the system

Users can add additional comments from the Timeline section and keep track of progress on ticket and also track how many hours have been spent on this



Reporting

The app also has inbuilt dashboards which would help in reporting and tracking of tickets raised and their status

Support Interactive Dashboard

This Month 01-03-2020 To 31-03-2020

