As an agent working in the Autotask ticketing program, it's important to be able to manage a number of factors at the same time. Remember that all tickets for which you are responsible will show up in the "My" tab at the top of the ribbon bar.

Although tickets are generally worked in the order that they are received, there can be exceptions. For example, a ticket with a higher priority should always be worked before tickets with lower priority levels. If a high or critical priority ticket is received while you are working on a lower-priority ticket, it may be necessary to pause that ticket, handle the higher-priority ticket right away, then return to the lower priority ticket after the higher-priority ticket has been resolved.

In addition, even among tickets with the same priority level, you can encounter tickets with varying differences of urgency. For example, say that you receive two tickets about printing. In the first ticket, the customer says, "I can't print." In the second ticket, the customer says, "I can't print, and I have to have these fliers ready for the 3PM meeting!"

Although both tickets would receive the same numerical priority, it is the second customer whose ticket carries the greater urgency, because they have expressed a specific deadline that they are facing. This is not the sort of nuance that can be directly tracked via statistics, but being aware of such situations will help you to manage your ticket queue as efficiently as possible.

Be mindful of your ticket notes. Each note that is not marked as "internal" will be sent to the customer in an email, so ticket notes are a great way to keep in communication with the end user. However, notes are also important because other AutoTask users may need to review the ticket from time to time.

For example, a procurement agent may wish to read the notes before ordering a piece of hardware; another Help Desk agent might need to read the ticket over when the customer calls with a question; or a manager may want to review why a ticket was placed into a particular status. Having ticket notes that clearly state the current ticket status is *critical*. Keeping the customer up-to-date about the progress of their ticket is also critical. Finally, the presence of current ticket notes will indicate that the ticket is not idle.

Allow the Autotask clock to run each time you work on a ticket. Many tickets will be closed within a single work session. Others may require a couple of sessions to complete, particularly if any sort of secondary process is involved, such as ordering hardware, or long-term monitoring. Allowing AutoTask to keep track of your time wil set up your tickets to be properly categorized and billed to the client.

Before placing a ticket into completed status, take a moment to review the selections that have been made for the ticket fields, particularly the Issue and Sub-Issue fields. It's possible you may not agree with the selections that the triage agent made, or, it's possible that, upon investigation, a ticket that looked as if it fit into a specific category actually fits better into a different category. (For example, a ticket that says, "I can't print," and is initially classified as a printer issue, could actually turn out to be a network issue, and require reclassification.)

Finally, when completing a ticket, be certain that you have entered notes, that are visible to the customer, that indicate what the fix actually was. Correctly classifying issues, and detailing the steps needed to correct them, can assist with analysis to spot recurring problems or underlying trends.

Please direct any questions about this training material to your manager or supervisor. Thank you for reviewing this training document, and remember to work smart.