

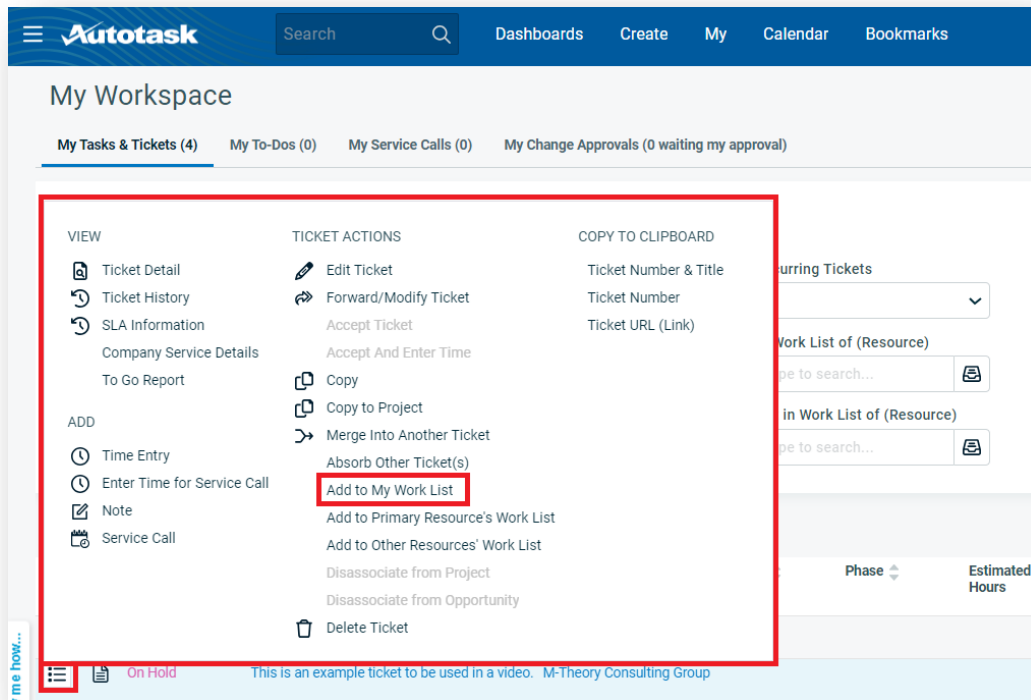


Duplicate Tickets in AutoTask: The Work List, Merging, and Absorbing

Page | 1

Autotask contains a context menu which details many ticket-related functions.

To view your tickets, go to the My tab in the work ribbon. The My tab will display any tickets that have been assigned to you. Each ticket in this list will display an icon with three lines. Hover over this icon without clicking. This will bring up the context menu. The Context menu will allow you to add an item to your work list.



The Work List can be accessed from the icon on the right-hand side of the "my" tab. To add an item to the work list, hover over the context menu, then select "Add to my work list." Multiple tickets can be added using this method.

The Work List tracks the number of tickets that have been placed on the list. The tickets can be dragged into any order, opened directly from the list, and the list will also allow the tracking of time for any ticket. Opening a ticket from the list will give a next-ticket arrow to allow you to easily move back and forth between the list items. To remove an item from the work list, click the minus sign next to its entry.

The screenshot shows the AutoTask interface with the 'Ticket Work List (3)' panel open. The panel lists three tickets with their IDs, descriptions, and time tracking options. The 'Add to my work list' icon is highlighted.

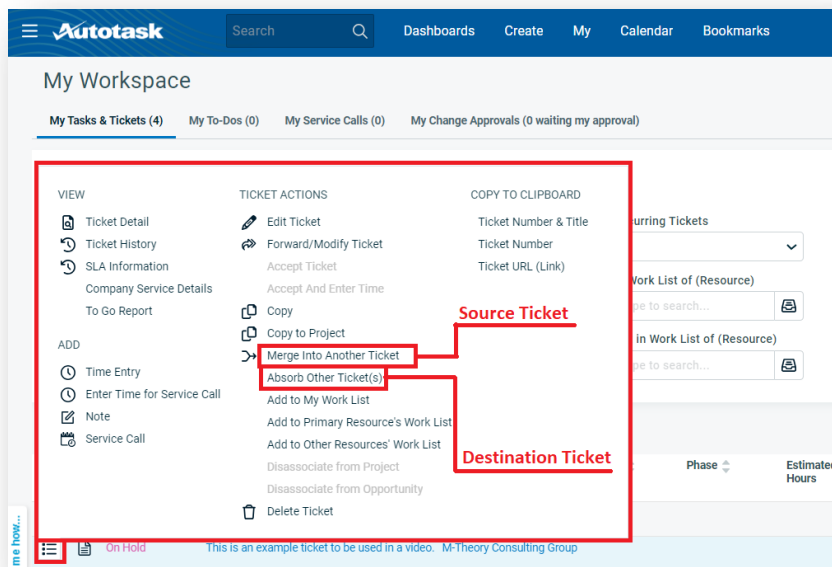
ID	Description	Time Tracking
T20231101.0098	ZZZ-Testing Co Inc. Test Ticket 2 for ZZZ Test Company 1	00:00:00
T20231101.0096	ZZZ-Testing Co Inc. Test Ticket 1 for ZZZ Test Company 1	00:00:00
T20231025.0109	M-Theory Consulting Group This is an example ticket to be used in a video.	00:00:00

The functions of "Merge into another ticket" and "Absorb another ticket" are both tools that can be used if a duplicate request is encountered. Although there are many situations where a duplicate ticket can be generated, the classic example involves an ongoing email thread. If the participants to the thread have CC'd the Help Desk, each response may create a new ticket. An email chain with twelve replies may create twelve tickets, even though all of the responses pertain to the same issue. In such a situation, the business process is to select one ticket, generally the first, as the ticket which will be kept open while work is performed. All other tickets are then merged into the primary ticket. At the end of the process, there will be only one open ticket, but the entire email thread, along with all tickets generated, will be visible in the ticket notes.

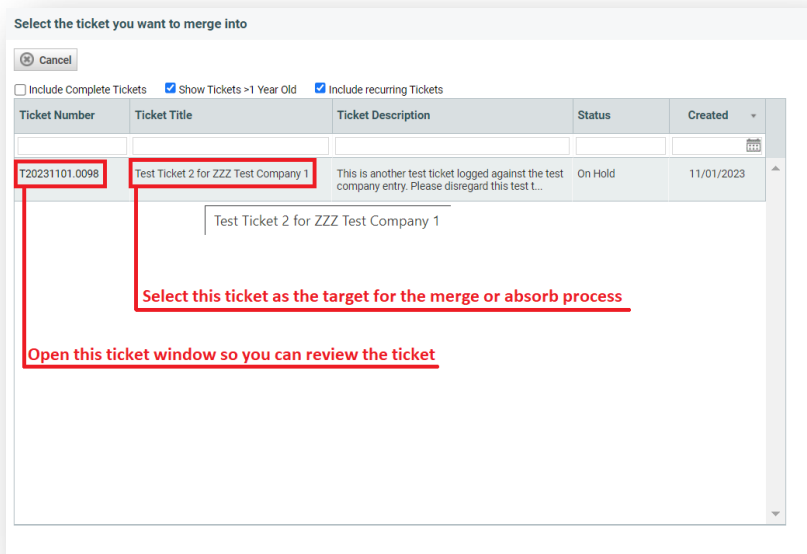
Source tickets are merged into a destination ticket; the destination ticket absorbs one or more source tickets. The different terms refer to the same operation, but indicate the direction of the process.

Each ticket to be merged must be logged against the same company. Tickets belonging to different companies cannot be merged.

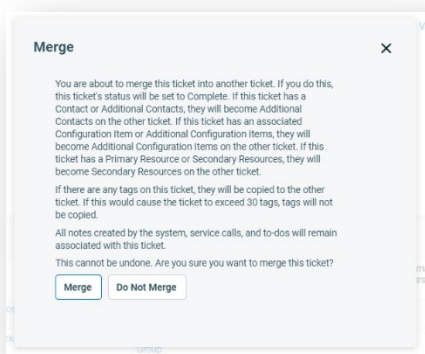
To begin the ticket merge, determine which ticket will be the destination ticket, remain open, and which ticket will be the source ticket, and subsequently be closed. To do the merge, hover over the context menu of the source ticket, then select "Merge into another ticket." A new screen will open, asking you to select the ticket you wish to merge into. You can either put in the ticket number of the destination ticket, or select the ticket from the list.



Once the destination ticket has been selected, you will receive a warning window. The warning window reminds you that, once a ticket is merged, it cannot be undone. Before selecting the "merge" button in the warning message, be certain you have correctly selected which ticket is to be the destination, and which is to be the source. If you are certain your selections have been correct, choose Merge to merge the tickets.



Once the merge has been completed, the destination ticket retains the status that it had prior to the merge. However, the source ticket is closed, and the information from the source ticket is placed into the destination ticket.



In an event such as an email thread, it may be necessary to merge a couple of different tickets. Once all merges have been completed, be sure to add a note into the surviving destination ticket, to be sent to the customer. Indicate that multiple tickets were received, and note which ticket number will remain open as the ticket that will be worked. Then, continue work as usual on the remaining ticket.

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.