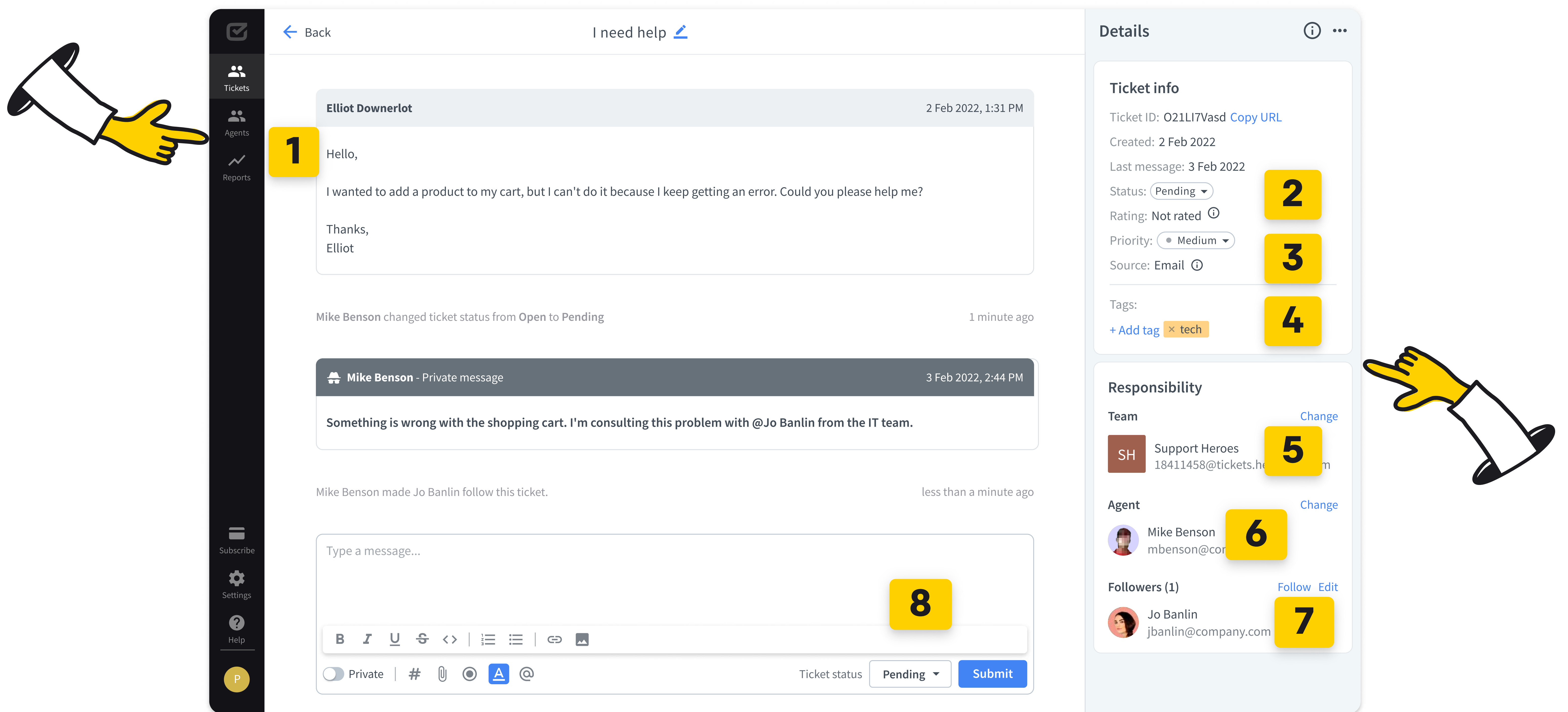















# The Ultimate Cheat Sheet for Solving Customer Tickets

Enter the ticket in HelpDesk to start solving the customer case.



| Action  | Details  | Done?                    |
|---|--|--------------------------|
| <p><b>1</b></p> <p><b>Get the details on the case</b></p> | <ul style="list-style-type: none"> <li>Carefully read the customer message.</li> <li>Check out the <b>customer's wording</b> to describe the issue or ask a question.</li> <li>See if the recipient's email address can give you detailed information about the company or industry.</li> <li>Focus on the communication channel the ticket came from and decide if it's worth supporting in the first place based on its popularity.</li> </ul> | <input type="checkbox"/> |
| <p><b>2</b></p> <p><b>Set the status</b></p>              | <ul style="list-style-type: none"> <li>Set the correct <b>ticket status</b> from the list based on the stage the customer case is at: <ul style="list-style-type: none"> <li>Open</li> <li>Pending</li> <li>On hold</li> <li>Solved</li> <li>Closed</li> <li>Spam</li> </ul> </li> <li>Keep your tickets up to date and visible to the customer service team to ensure your tickets move along in the queue.</li> </ul>                          | <input type="checkbox"/> |

| Action   | Details  | Done?                    |
|--|--|--------------------------|
| <p><b>3</b></p> <p><b>Set the priority</b></p>         | <p> Look at the content of the message, the type of customer asking the question, or any other attribute to set the <b>ticket priority</b> and the urgency level:</p> <ul style="list-style-type: none"> <li> Urgent</li> <li> High</li> <li> Medium</li> <li> Low</li> </ul> <p> The priority levels are tied to the next steps in escalating the case. Based on them, you can decide when to respond to a ticket or involve other experts.</p> | <input type="checkbox"/> |
| <p><b>4</b></p> <p><b>Tag the case</b></p>             | <p> Use <b>tags</b> to label similar tickets with keywords, categorize them, and group them.</p> <p> Create tags related to your business, the type of issue, or the action needed, such as:</p> <p><i>Complaint, Refund, Billing, Feedback, Bug, Newsletter, Product request, Support, IT, Sales, Marketing, HR, Onboarding, Booking error, Payment, Rewards program, Contract, Follow up required, Review, Unsuccessful cancellation, Cancel reservation, etc.</i></p>   | <input type="checkbox"/> |
| <p><b>5</b></p> <p><b>Add the responsible team</b></p> | <p> Assign a responsible team from <b>the first or second customer service line</b>.</p> <p> First-line agents are the first point of contact for the customer. They scan the tickets and then assess what assistance the customer needs.</p> <p> Second-line agents are usually technical experts who conduct a more in-depth analysis of the case.</p>  | <input type="checkbox"/> |
| <p><b>6</b></p> <p><b>Choose the right agent</b></p>   | <p> Assign the ticket to an agent from the team you selected earlier.</p> <p> If the customer case is sensitive, you can check which agent has the best ratings on the ticket <b>satisfaction report</b>.</p>  | <input type="checkbox"/> |








**Want to take these actions now and solve tickets in an organized way?**

**Try HelpDesk for 14 days for free**

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- ✓ Ready-to-use automations
- ✓ Simple setup

**Sign up free**



| Action   | Details  | Done?                    |
|--|--|--------------------------|
| <p><b>7</b></p> <p><b>Add other people to the case</b></p> | <ul style="list-style-type: none"> <li> Add other agents as <b>ticket followers</b> if the customer case is complex and requires more attention. They'll be notified when something happens in the ticket and made aware of any changes.</li> <li> Add another recipient to the message by adding <b>people to the loop</b>. They'll be included in the message chain, and they can see all the information you've shared.</li> </ul>  | <input type="checkbox"/> |
| <p><b>8</b></p> <p><b>Respond to the ticket</b></p>        | <ul style="list-style-type: none"> <li> <b>Greet the customer</b> and give them the answers they need to proceed.</li> <li> Add useful <b>attachments</b> to the message or <b>record your screen</b> to instruct.</li> <li> End the message with a <b>suitable closing</b>.</li> <li> Follow the rules for <b>writing a customer service message</b>. This will help you avoid unfortunate <b>email mistakes</b>.</li> <li> Save your message as a <b>canned response</b> to use in similar cases in the future.</li> </ul> | <input type="checkbox"/> |

## Check out our case study to learn how they achieved success with HelpDesk!



*brastel*

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