MintSD

Release 3.3.4

OPGKSoftware

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CONTENTS

CHAPTER

ONE

INTRODUCTION

Thank you for choosing **Mint Service Desk**.

The present document is the main reference for **MINT Service Desk** users, the purpose of the document is to explain all the functionalities and configurations available in **MINT Service Desk**. This guide includes the customer, agent, and administrator interfaces along with all the configurations and changes that you can do in the system.

1.1 MINT SERVICE DESK

MINT Service Desk is a service management solution to monitor, track, and exchange information about resources within your company and with outside vendors.

MINT Service Desk is a web-based application for service management, it is a multi-channel system that allows you to support your customers (internal or external) based on the service request they will send via email, portal, or any other communication channel supported by MINT Service Desk. A user-friendly ticketing system with a lot of integrated features from a fresh point of view.

The roadmap for **MINT Service Desk** includes new functionalities and ITSM features that are being developed and tested now, like:

- Service Desk and Ticketing System
- Asset Management
- Incident Management
- Problem Management
- Multichannel Communication
- Process Management
- IoT Asset Management
- Knowledge Management
- Reporting

1.2 PROFESSIONAL SERVICES

OPGK Software is the owner and developer of the **MINT Service Desk**, we provide professional services to our customers to implement our software successfully.

Our catalog includes consulting, training, development, and managed cloud services. We also have a Partnership program and special programs for educational and non-profitable organizations.

Visit us at *mindsd.com* or send us an email to *info@opgksoftware.com* thanks!

CHAPTER

TWO

SYSTEM REQUIREMENTS

Mint Service Desk runs in **Docker** (a computer program that performs operating-system-level virtualization, which means that a virtual machine will be deployed in your server in order to have your **MINT Service Desk** up and running. The **MINT Service Desk** installation file for Docker includes an application, database, and web server embedded to deploy **MINT Service Desk**.

In order to install **MINT Service Desk**, the minimal server requirements are:

2.1 HARDWARE

MINIMAL SERVER REQUIREMENTS

CPU: Intel Xeon 2.0 GHz or equivalent

RAM: 8 GB

Disk space: 100GB

2.2 SOFTWARE

SUPPORTED SYSTEMS AND VERSIONS

Operating Systems:

Linux (all distributions supported by Docker)

Database (embedded):

PostgreSQL

Web browser:

Chrome

Firefox

Safari

Opera

Edge

CHAPTER

THREE

GETTING STARTED

The following instructions will help you to start using **MINT Service Desk**.

After getting the installation package from your purchase, you can go directly to installation steps below.

In case of any problems, you can always contact us at *https://www.mintsd.com/pages/contact* or directly by email: *support@mintsd.com*.

3.1 SCRIPT-BASED INSTALLATION

The installation of Mint SD with the use of installation script allows you to quickly launch the services. The script can generate all the data needed to run the service stack.

3.1.1 Installation of dependencies

Before starting services, you need to install Docker Engine. The process may be different for different systems. Installation methods are described in the *documentation*.

In order to unpack the package, it is also required to install 'unzip' application. This can be done in different ways depending on the system, depending on the package manager.

For `yum` (e.g. CentOS):

```
$ sudo yum install unzip
```

For `apt-get` (e.g. Ubuntu):

```
$ sudo apt-get install unzip
```

Older versions of Mint SD also required `docker-compose` to be installed. Specific installation steps can be found in the *documentation*.

3.1.2 Starting new installation

Before starting the script, you need to put Docker in swarm mode with the command:

```
docker swarm init
```

After unpacking the package with a command, the `./start.sh` script is located in the main folder. Starting it will ask for passwords to the database, RabbitMQ, and token-signing certificate. The script will request a server domain and then generate SSL certificates, create individual secrets, load images of the services from the archive, and start the service stack.

3.2 DOCKER-BASED INSTALLATION

Installation which uses only Docker is more complicated but allows more freedom to run individual elements of the system.

3.2.1 CONTENT OF `services.yml` FILE

The `services.yml` file contains a definition of all parameters that are required to run. These are environment variables (in `environment` blocks) and secrets (in `secrets` blocks).

The `secrets` block placed at the beginning of the file defines dependencies to secrets and defines them as external.

The `volumes` block defines the mapping of volumes to the consistency of database data and data bus.

Containers running in one Docker network can communicate with each other. By default, each of them receives the same hostname as the name of the service defined in the file (e.g. `database` for the Postgres databas, `rabbitmq` for the bus, etc.).

Container images can be downloaded from the container register.

3.2.2 Complementing environmental variables

The environmental variables in the `services.yml` file that need to be replaced are the following:

- domain name, hidden under the `${FQDN}` (from Fully Qualified Domain Name)
- system name - `${SYSTEM_NAME}`, which is one of the validation parameters of the subscription token.

Additionally, in environmental variables in some services there is the name of the host on which RabbitMQ was launched. The default is:

```
rabbitMq__hostnames__0=rabbitmq
```

The domain name in the configuration is needed to:

- setting up a token publisher in the `Auth` service
- setting up the default address of the front client in the `Auth` service
- setting up the location of the directions for the `Gateway` service and `Auth` service for `Frontend` service

3.2.3 Completing the secrets

Secrets that are kept in the Docker's database are passwords to the database and data bus, connection strings to the database for various services, SSL certificates for `Reverse Proxy` service and password encryption keys for `Mailing` service. Information about secrets also can be fould in the *documentation*

3.2.4 Password encryption keys

Key secret for `Mailing` is `MailingSecret` respectively. It has a string GUID (globally unique identifier) format. It is important that it does not have other characters e.g. End of Line.

3.2.5 Starting up services

Having prepared `services.yml` file with changed environment variables and defined all necessary secrets we can now run services. For this purpose, we will use the following command:

```
$ docker stack deploy --compose-file services.yml stack_name
```

The set of services that is running is called stack, hence the parameter: stack_name. To disable the whole stack of services we can use the command:

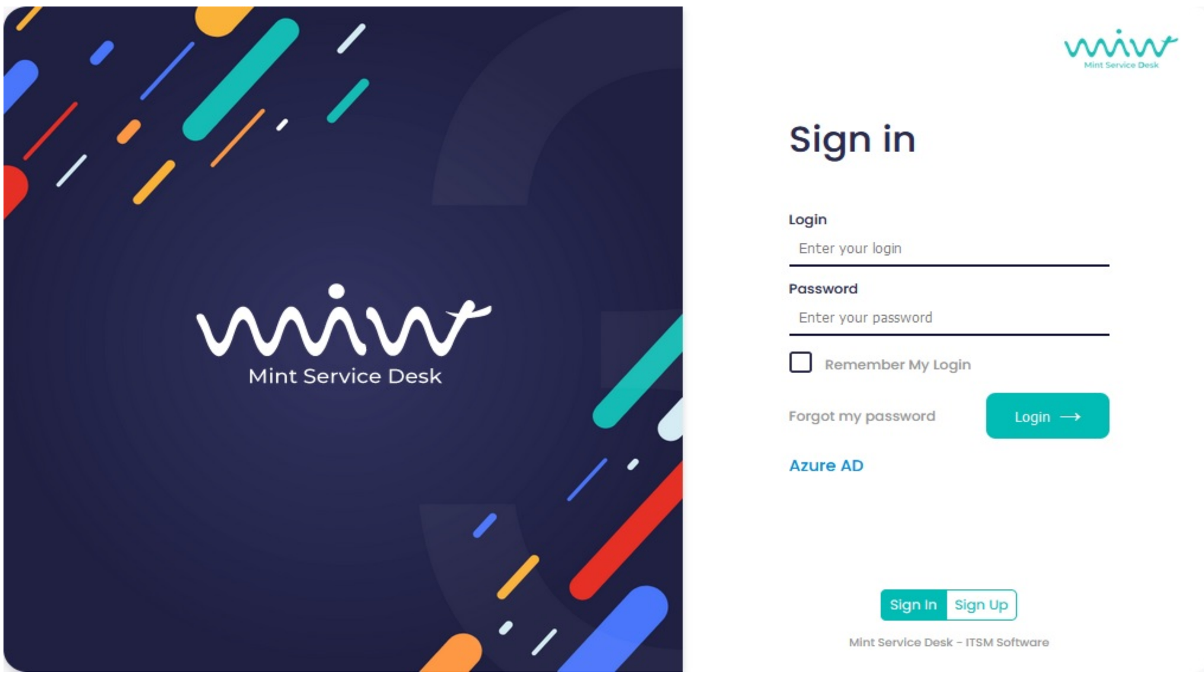
```
$ docker stack rm stack_name
```

We can also modify individual running services in the stack with the `docker service update` command. More information about this command can be found in the *documentation*.

3.3 FIRST LOGIN

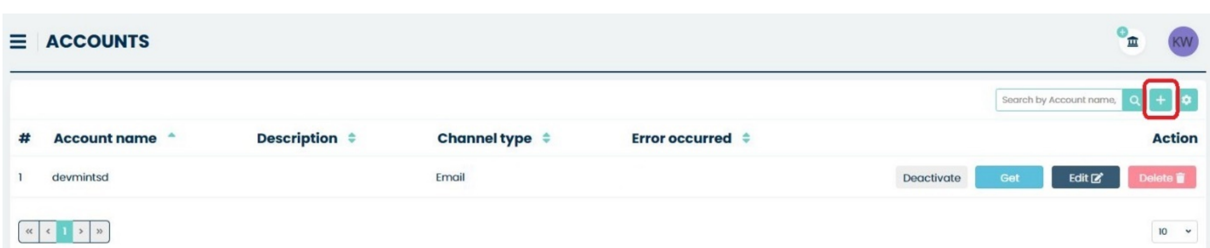
Type your server IP on your web browser and login with the default admin account credentials (remember to change it):

Login: **admin** Password: **admin1**

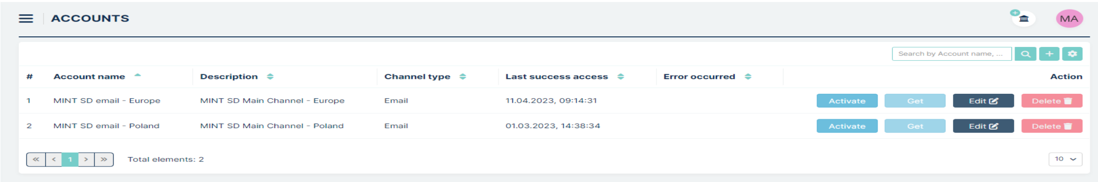


Now, in order to start using Mint Service Desk you need to:

1. Define a new email account from which messages will be sent. You can do it in section Email > Accounts. Right here you need to click on the small  button located on the right side of the search bar.



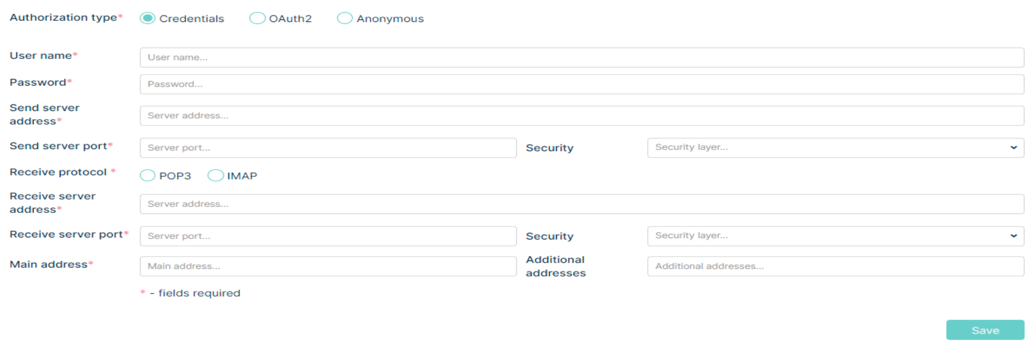
   Inside the "Create Account" view you will need to fill up the required information (fields marked with a *). Also, you can add some additional information inside the "Description" text field.



Now, in the next view, you will need to select which email you're using. You can choose:

- Gmail
- Yahoo!
- Microsoft Office 365
- Other
- Microsoft Graph Api

After that fill up the necessary information – you will find more information about creating accounts in the **Admin>Email>Accounts** part of this guide.



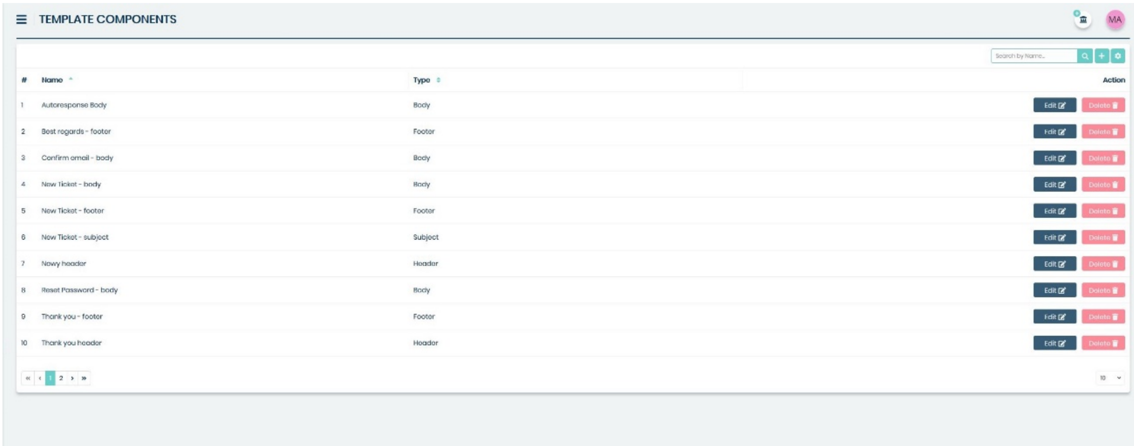
Once you finish, click on the  button to finish the process and save the new email account.

You will be moved to the list of existing accounts, where you will see a new position with some information about your new email account.

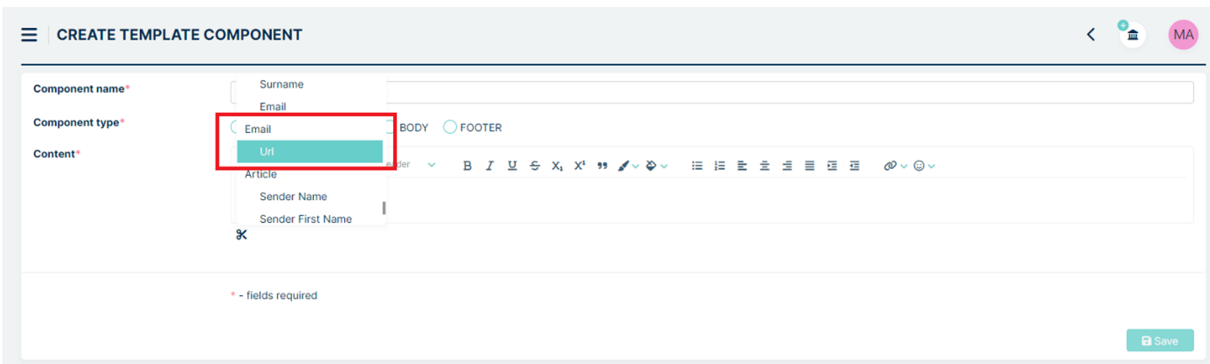
1. Define at least one "Body" type template component which includes at least '{{EmailURL}}'.

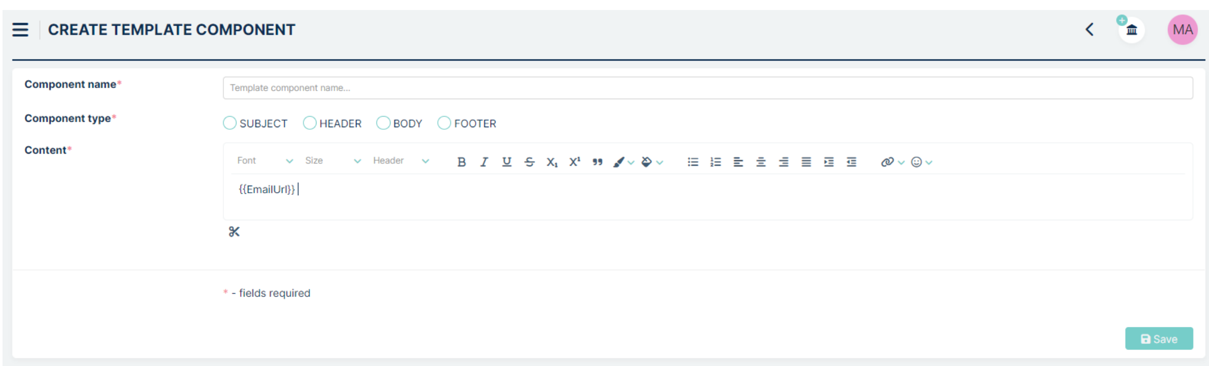
   You can do it in section Tickets > Components.

   Right here you need to click on the small  button located on the right side of the search bar.



In the view responsible for creating a new template component click on the ✂ button located right below the ‘Description’ section. Select Email > Url from the menu.



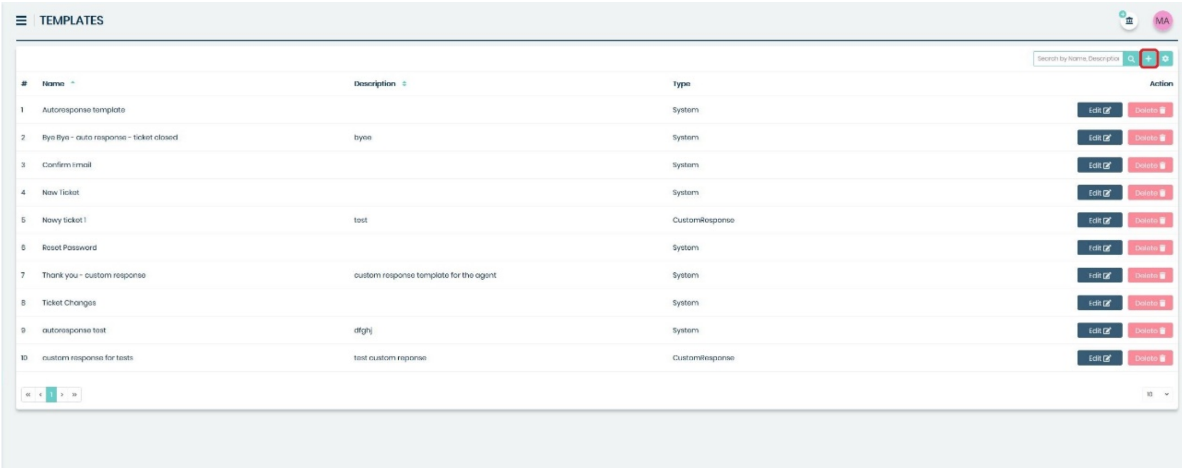


Now click on the  button.

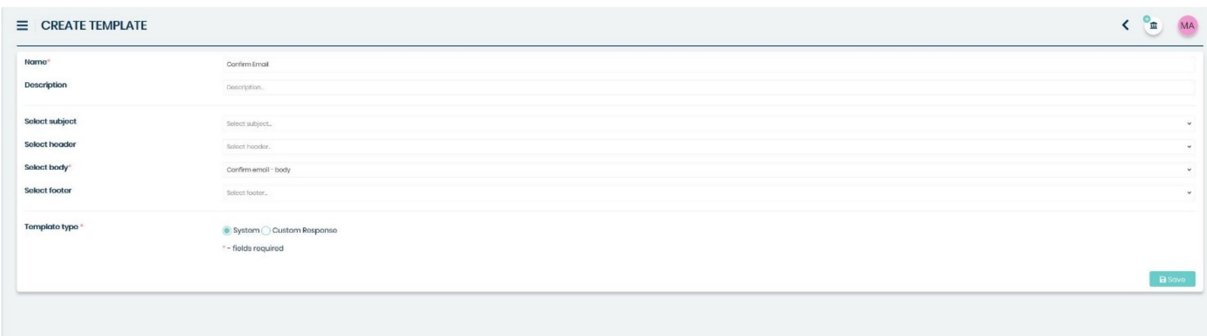
You will find detailed description regarding creating templates in the Admin>Tickets>Templates part of this guide.

3. Define at least one template. You can do it in Tickets > Templates section.

Right here you need to click on the small  button located on the right side of the search bar.



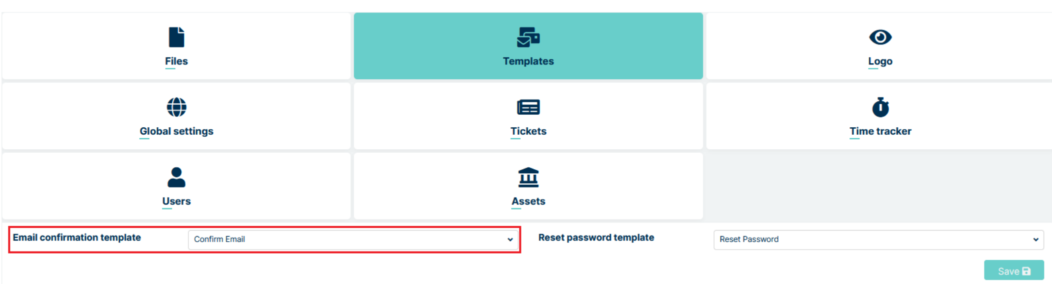
You need to choose a previously created Body type Component from the list in the 'Select body' section. Also, remember to create an appropriate name for this template and select "system" from the "Template type" part of this view.



Click on the 

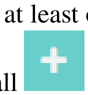
button.

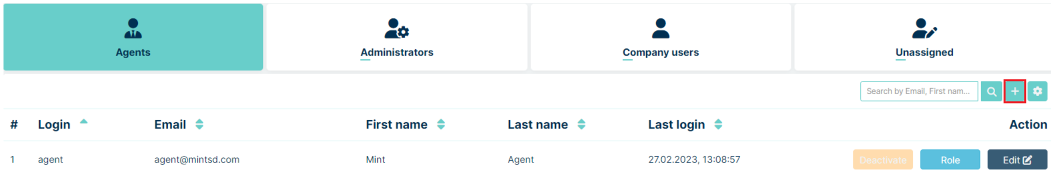
4. Now you need to Set up 'Email confirmation Template'. You can do it in the Settings>General>Templates and choosing already created template from the list in the 'Email confirmation template' section.



Once you do that, just click on the 

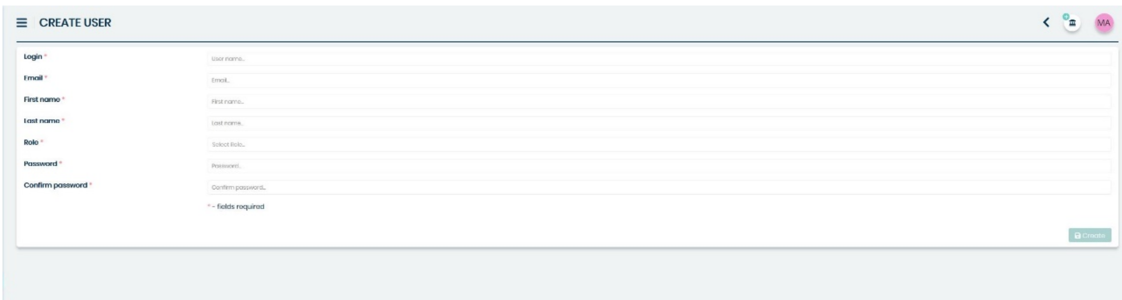
button.

5. Now you need to create at least one Agent type user. You can do in the Agents>Agents section. Right here you need to click on the small  button located on the right side of the search bar.



Inside, in the 'Create User' view, you need to fill up all of the required information and click on the 

button once you do that. Take notice, that you need to select a correct 'Role' from the list.



MINT Service Desk has one already predefined Agent role. If you want to learn more about adding and managing system Roles, you will find more information in the Admin part of this guide.

6. Once Agent is created, the first attempt to login will send a verification email to the new Agent on his email address (given during the previous step). It will include a request to validate his email address.

   Once that's done – you are ready to go.

3.4 UPGRADING

If you have a previous version of **MINT Service Desk** and you want to upgrade your system to the latest version, you can do it as follows.

First, you need to download the latest version of MINT Service Desk here:

https://www.mintsd.com/pages/download-center

Before using start.sh command you should use this one to disable MintSD

```
docker stack rm mintsd
```

This will remove stack with the name mintsd. Wait a few moments for the process to complete.

Then you just need to extract the package downloaded and run the start file.

Linux/OSX:

```
./start.sh
```

You are not going to go through all the same steps again like in the installation, the system will only apply the changes and upgrades needed from the previous version and it will keep your data safe.

3.5 BACKUP AND RESTORE

3.5.1 CREATE BACKUP

To start the backup process, get inside the container where the database is:

```
docker exec -it id_container /bin/sh
```

`id_container` to the database. When you enter the container you should enter:

```
pg_dumpall -U postgres --filename.sql
```

`filename.sql` filename with extension sql.

Then exit the container with the command:

```
exit
```

Once out of the container you should enter the command:

```
docker cp id_container:/filename.sql .
```

`docker cp id_container:/filename.sql .` copies a file with a copy of the database to the MINT machine

3.5.2 RESTORING DATA

To start the restoring process, copy the database dump to a container:

```
docker cp filename.sql id_container:/filename.sql
```

The next step is to get to the database container:

```
docker exec -it id_container /bin/sh
```

The final step is to type the command to restore the copy:

```
psql -U postgres -f filename.sql
```

3.6 SSL CERTIFICATES

In order to get a secure SSL connection, you need to replace the generated self-signed certificates with properly signed certificates.

3.6.1 Format of certificates

The `Reverse Proxy` service expects a public certificate in `crt/pem` format.

Example 'pem' certificate:

```
-----BEGIN CERTIFICATE-----
MIID/TCCAuWgAwIBAgIUWOtKfWa9w1Fqh7ghzA+iflYebGAwDQYJKoZIhvcNAQEL
BQAwgY0xCzAJBgNVBAYTAlBMMRMwEQYDVQQIDApUZXN0X1N0YXRlMQ4wDAYDVQQH
DAVUZXN0IDEVMBMGA1UECgwMVGVzdF9OYW1lICAgMRIwEAYDVQQLDAlUZXN0X1Vu
aXQxDzANBgNVBAMMBkNvbW1vbjEdMBsGCSqGSIb3DQEJARYOdGVzdEB0ZXN0LnRl
c3QwHhcNMjAxMDA2MDg1MjQwWhcNMzAxMDA0MDg1MjQwWjCBjTELMAkGA1UEBhMC
```

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```
...
WbVPWX706/s/tAgdXzz6AnVlUrErPPy+2zk0iZoIjLh1oXaqcLea4hXyFoRj6QBm
8Z8p3Fbm3NyyeEMTj91fu5UB647yU6ZBsW+dgiYBJaPuoKUrXbqZz/cQ92jnd+TF
6FzFOvXqM36Kl/dLmYibv0VXMjYT6PnY1nikBc2ve1aMM0TUR70Jb1U7Fv1FNH7V
/JhMr7rCO9UHL91KoF9t1Lc=
-----END CERTIFICATE-----
```

Example ‘key’:

```
-----BEGIN PRIVATE KEY-----
MIIEvQIBADANBgkqhkiG9w0BAQEFAASCBKcwggSjAgEAAoIBAQDW2KUzPcyf3mTo
HI4mm1UR9+cggDNn6Uufyur6kI2Qj+ILKBvwX/+SnBimGuEtJJjddiNJo/Ahu0LI
A01tsa0wfsGErtuGK/poPGlA47Ucq6bVbtnzDZp2Hn4bdGAHvqILRZldE8S9QT6x
hsl40JJVWN8aOrOTdyAo3OQ4CAORMOss1jod+44OTH8P/0OYQ/MLZNdwOXVBMqM9
qy28LXrxkfugGvGVIZiQGueAJSijzPmh0ydNvejhA1QnotJSb2QnVppPmtzk/sGM
...
Z4VW3myfK64qsRP3syGOFFcWDqZZe28dL/8LYb0CgYEA2W2nHVIu0cUIPT9tMvz7
nhNMuYCgP7yKWU4WCLkksLxfYL/zSdveCBddT0dFeq8chZzD4qeOHavwajYosEej
M1q9Obq7vOkDtB3GqJHNp+1CCJvzZAW2Aca5FR+mnIZ1JgzVC6f2/m0fPpyksJaL
LtosfA36JGx73J3QRshFNHg=
-----END PRIVATE KEY-----
```

3.6.2 Generating self signed certificates

The easiest way to generate a certificate is to have Linux system with `openssl` installed. You can then use the command:

```
$ openssl req -newkey rsa:2048 -new -nodes -x509 -days 3650 \
  -keyout "privkey.key" -out "fullchain.pem" -subj \
  "/C=PL/ST=Test State/L=Test /O=Test Name\
  /OU=Test Unit/CN=Common/emailAddress=test@test.test"
```

3.6.3 Certificate replacement in docker secret

Unlike environmental variables, the secret cannot easily be replaced. To do so, the secret must first be unplugged from the running `Reverse Proxy` service.:

```
$ docker service update --secret-rm Certificate__pem --secret-rm CertificateKey__key␣
↪mintsd_reverse-proxy
```

Then we must remove the existing secrets from the secret database.:

```
$ docker secret rm Certificate__pem CertificateKey__key
```

The next step is to create new secrets from the key and certificate. Use the following commands:

```
'$ docker secret create Certificate__pem certificate_name.pem'
'$ docker secret create CertificateKey__key key_name.key'
```

Finally, the newly created secrets have to be connected to the `Reverse Proxy` service.:

```
$ docker service update \
  --secret-add source=Certificate__pem,target=/etc/ssl/private/fullchain.pem \
```

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```
  --secret-add source=CertificateKey__key,target=/etc/ssl/private/privkey.key \
  mintsd_reverse-proxy
```

3.7 USING LET'S ENCRYPT - FREE SSL CERTIFICATES

Let's Encrypt allows you to generate a signed certificate for free by using the command:

```
$ sudo certbot certonly --nginx
```

Detailed installation and usage instructions can be found in the documentation:

https://certbot.eff.org/

NOTE: In order to run `certbot` application you need ports 80 and 433 and an assigned domain. Therefore, the application cannot be launched if Mint SD has already been launched and occupies the ports.

3.7.1 Automatic certificate upgrade

By adding the `certbot` command to `/etc/crontab` you can force a new certificate generation after a certain time.

Below you can see the example of using `/etc/crontab`:

```
$ echo "0 0,12 * * * root python -c 'import random; import time; time.sleep(random.
↪random() * 3600)' && certbot renew -q" \
  sudo tee -a /etc/crontab > /dev/null
```

However, with the `Reverse Proxy` service running, updating the secret where it is located may be non-trivial. For best results it is good to take the reverse proxy configuration to the host machine. Thanks to this, updating the environment will only consist of replacing certificates by `certbot`.

Details of reverse proxy configuration can be found in the next part of this guide.

3.8 REVERSE PROXY

`Reverse Proxy` service is used to split traffic directed to one domain into different services. The determination to which service it should be redirected is based on url address. In the service stack, three other services are hidden directly behind `Reverse Proxy`. These are: `Frontend`, `Gateway`, and `Auth`.

3.8.1 Configuration of redirections

The redirection configuration is in the `nginx.conf` file in the `server` block. Built-in reverse proxy contains 4 `location` blocks.:

```
location /api/ {
  proxy_pass http://gateway/api/;
  include common_location.conf;
}

location /livereloadHub {
  proxy_pass http://gateway/livereloadHub;
  proxy_http_version 1.1;
  proxy_set_header Upgrade $http_upgrade;
  proxy_set_header Connection "Upgrade";
```

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```
}

location ~* ^/(idp|connect|\.well-known|Account|external) {
  proxy_pass http://auth;
  include common_location.conf;
}

location / {
  proxy_pass http://frontend;
  include common_location.conf;
}
```

The first block redirects all requests in `https://domain.name/api/` format to the `Gateway` service.

The next block, in addition to redirecting traffic from `https://domain.name/livereloadHub` to the `Gateway` service, specifies the possibility of communication via the 'web socket' protocol.

The third block defines a series of redirections to the `Auth` service, such as the login page, OpenID connect or static resources used on the login page.

The last block redirects all other requests to the `Frontend` service.

The `common_location.conf` file contains a definition of the headers needed for the proxy to work properly. These are headers such as `X-Forwarded-For`, `X-Forwarded-Proto`, `X-Forwarded-Host` or `X-Forwarded-Port`.

3.8.2 SSL Configuration

Basic SSL configuration can be found in `ssl.conf` file. The file contains the definition of supported protocols, encryption definition and certificate location, which is set to `/etc/ssl/private/` by default.:

```
ssl_certificate              /etc/ssl/private/fullchain.pem;
ssl_certificate_key          /etc/ssl/private/privkey.key;
```

3.8.3 Reverse proxy on the host machine

The resignation from the standard reverse proxy running in the service stack allows for a wider configuration of settings.

Changes in the `services.yml` file.

To properly run services you need to make some changes to the service definition in `services.yml` file.

1. Ports from `Frontend`, `Gateway` and `Auth` services should be exposed directly. If you take one them as an example, it looks like this.:

```
gateway:
   image: mint/gateway:latest
   ...
   ports:
     - port_on_which_we_want_to_start_service:80
```

2. The definition of `Reverse Proxy` service must be removed from the `services.yml`.

Note: Ports defined in this file will be needed later in reverse proxy configuration. When you start the stack, the services will be directly visible on the host machine.

Definition of reverse proxy

HTTP reverse proxy can be defined using different HTTP servers. In this case `nginx` will be used. The initial configuration will be twinned to the one existing in the default `Reverse Proxy` service.

In Docker Swarm, the network interface driver is 'overlay' type. This means that services will NOT be visible at the `localhost` address. You can use the `ip addr` command to check the access address to the stack.

The result should be as follows:

```
...
5: docker_gwbridge: <BROADCAST,MULTICAST,UP,LOWER_UP> mtu 1500 qdisc noqueue state UP␣
↪group default
    link/ether 02:42:98:4e:fe:bc brd ff:ff:ff:ff:ff:ff
    inet 172.21.0.1/16 brd 172.21.255.255 scope global docker_gwbridge
       valid_lft forever preferred_lft forever
    inet6 fe80::42:98ff:fe4e:febc/64 scope link
       valid_lft forever preferred_lft forever
...
```

The address assigned to the `docker_gwbridge` interface is the address that we will use later when defining the reverse proxy configuration. In this case it is `127.21.0.1`.

Changes that need to be made in `nginx.conf` in relation to the built-in 'Reverse Proxy' are only redirection addresses. Instead of `http://gateway` you should use `http://ip_address_docker_gwbridge:the_port_where_the_service_was_exposed`. The same for other location blocks.

CHAPTER

FOUR

WEB INTERFACE

4.1 LOGIN PORTAL

The Mint Web Client URL leads you to the login portal, to ease the user management, all the users can log in in the same page and the system will open the proper session based on the assigned role.

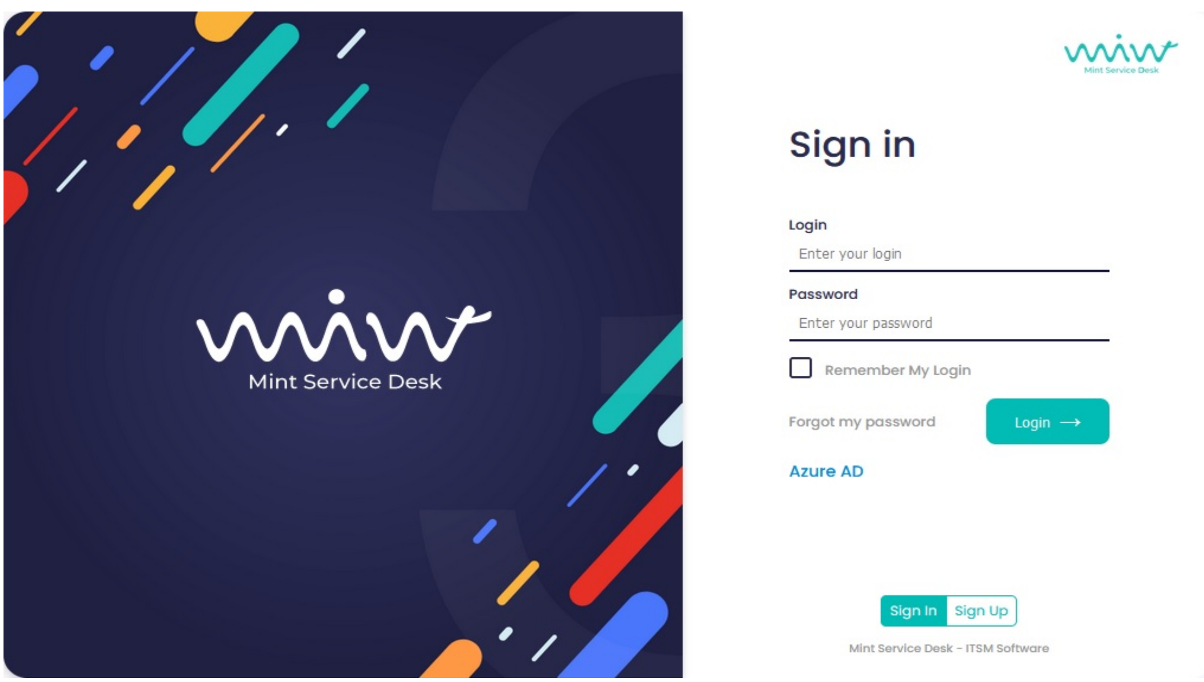
Mint Service Desk works with three different user profiles:

- Customer
- Agent
- Admin

4.1.1 SIGN IN

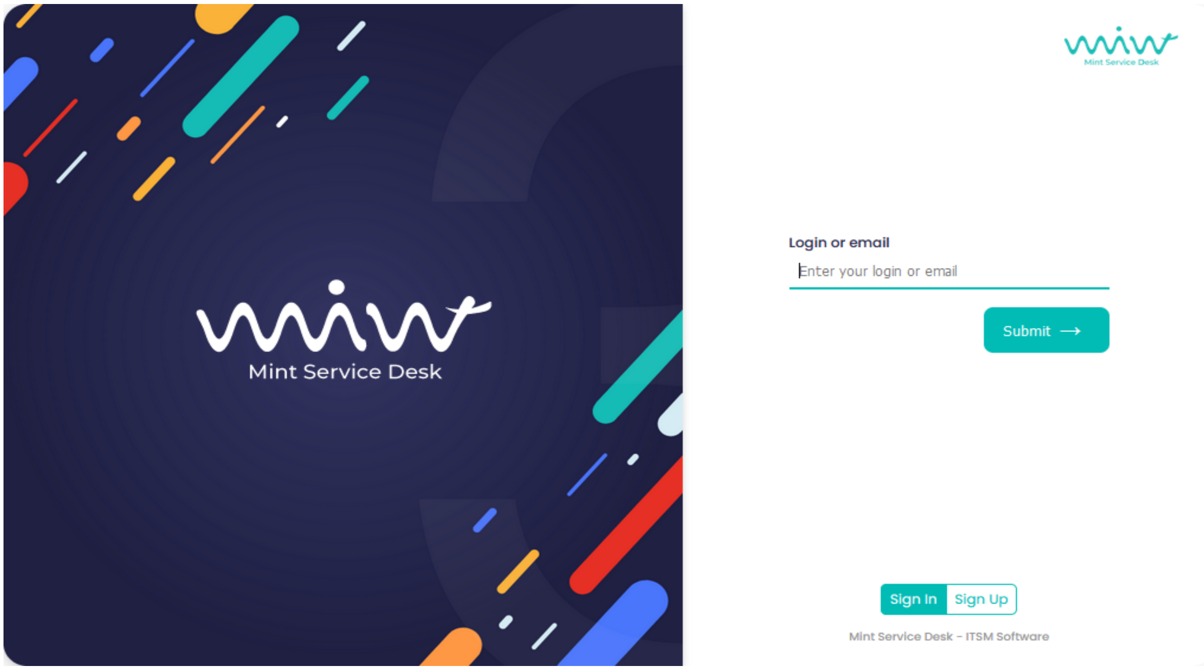
It is the main displayed screen. If you already have an account, just type your username and your password in the corresponding fields and click on 

. If you want, you can check the option "Remember My Login".



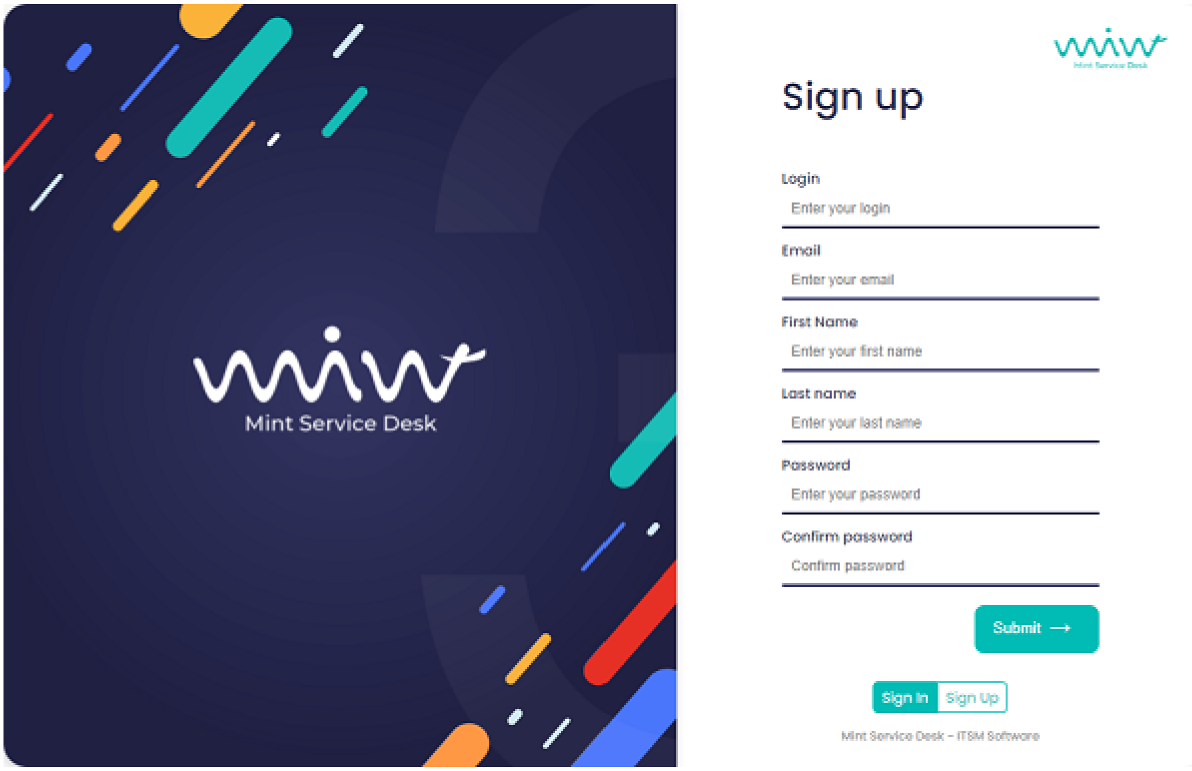
4.1.2 FORGOT MY PASSWORD

If you forgot your password you just need to click on the Forgot my password link that will forward you to a new screen where you need to type your email address in order to receive a new temporary password. Don't forget to change it to something you will remember easily but remember that password should also be safe and hard to crack.

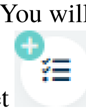


4.1.3 SIGN UP

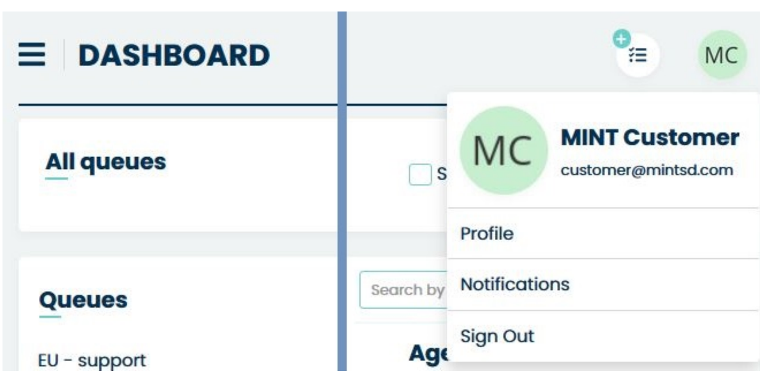
If you don't have an account, the Sign In button (on the right upper corner) will take you to a predefined form, where you have to type your personal information: "LOGIN", "EMAIL", "FIRST NAME", "LAST NAME" and "PASSWORD", in order to create your account. The **MINT Service Desk** admin will receive your request, activate your account and assign you a correct Role - so you would be able to log in.

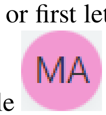


4.2 BASICS

All users have the same section to change their profile settings, after a successful login. You will find an action bar on the top, including the  button to hide/show the menu sidebar on the left, the new ticket  action button (Client and Agent account) and the profile 

. Agent user will also have one additional button available used for creating a new asset.



On the top right corner, you will see a picture or first letters (name, surname) from your profile. In order to edit your profile or logout, you need to click on the circle 

.

It will display a menu with three options: “Profile”, “Notifications” and “Log out”.

4.2.1 PROFILE

If you click on "Profile" it will lead you to the section where you can personalize various settings, such as personal information, contact details, appearance configuration, ticket view, signatures, and many other options. This functionality will be described using the agent profile as an example.

We distinguish the following sections

Basic information

This section contains:

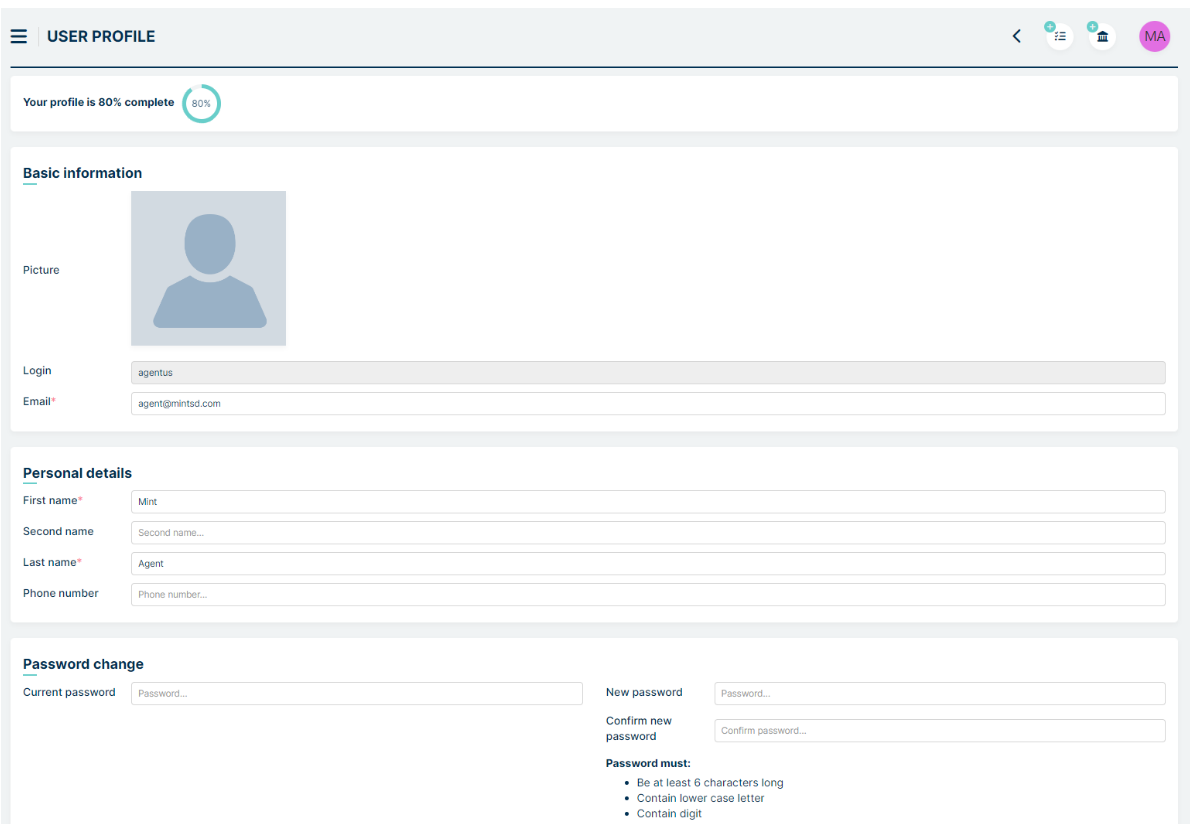
- **Picture** - Here we can set our own profile picture.
- **Login** - The user's individual login (editable only by the admin).
- **Email** - Contact email address.

Personal details

Here you can change your personal data, like Language, Theme, First Name, Second Name, Surname.

Password change

As the name suggests, you can change the password here by entering information in the fields: Current password, New password, Repeat new password.



Moving further down, we have additional available options.

User settings

This section consists of the following settings:

- **Language** - you can choose from several available languages

- **Line manager** - you can set your supervisor here (agent or customer) - setting used in Approvals (see Approvals tab in Admin profile)
- **Theme** - you can choose from: Default (light theme), Gray, Dark
- **Ticket view** - Controls the default panel settings when viewing ticket details. You can choose Chat view or Table view
- **Default ticket creation type (available only for Agent)** - here, you can choose the default tab that will be set when entering the screen for creating a new ticket. Available options are: Ticket, Email Ticket and Customer Portal Case displayed as a tab (functionality described in the Customer Portal section in the Admin profile). This setting can be enabled or disabled in Admin profile in Settings > General > Tickets
- **Change status after assignee (available only for Agent)** - Assigning an agent to a ticket with the "Open" status results in an automatic status change. This setting applies to the profile from which the assignment action is performed
- **Recipient autofill (available only for Agent)** - If enabled, when replying to a ticket via email, the system automatically fills in the sender's email address
- **Automatic ticket assignment to yourself (available only for Agent)** - When enabled, any ticket created by an agent is automatically assigned to that agent. However, if the queue assigned to the ticket has a default agent with the "Assign when creating the ticket" option enabled, the default agent takes precedence

User interface

Here, at this moment, the available setting is Scroll size where you can manage the width of the sliders in Mint. You can choose between the standard size (Normal) and the reduced size (Small).

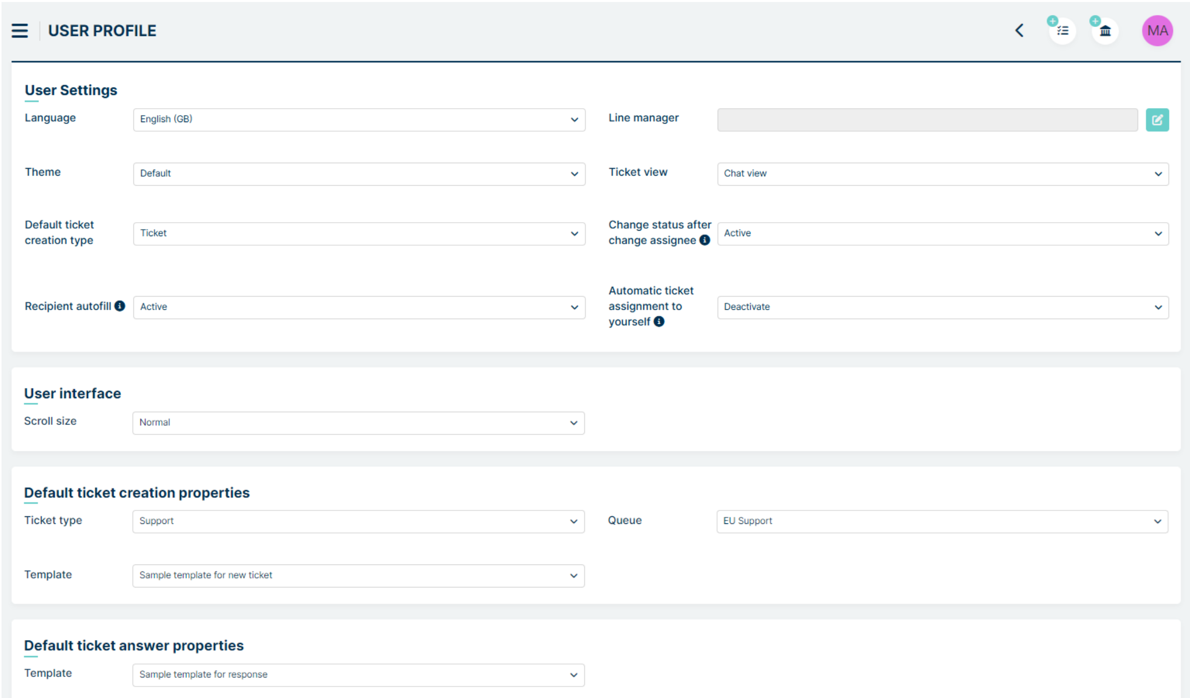
Default ticket creation properties (available for Agent and Customer)

This setting can be enabled or disabled in Admin profile in Settings > General > Tickets. Here you can customize the ticket creation panel according to your needs.

- **Ticket type** - Choose from a dropdown list; the selected type will be set by default when creating a ticket.
- **Queue** - Similar to the above, this applies to the Queue field.
- **Template** - Here we set the template that will appear in the first lines of the Description field in the ticket creation view.

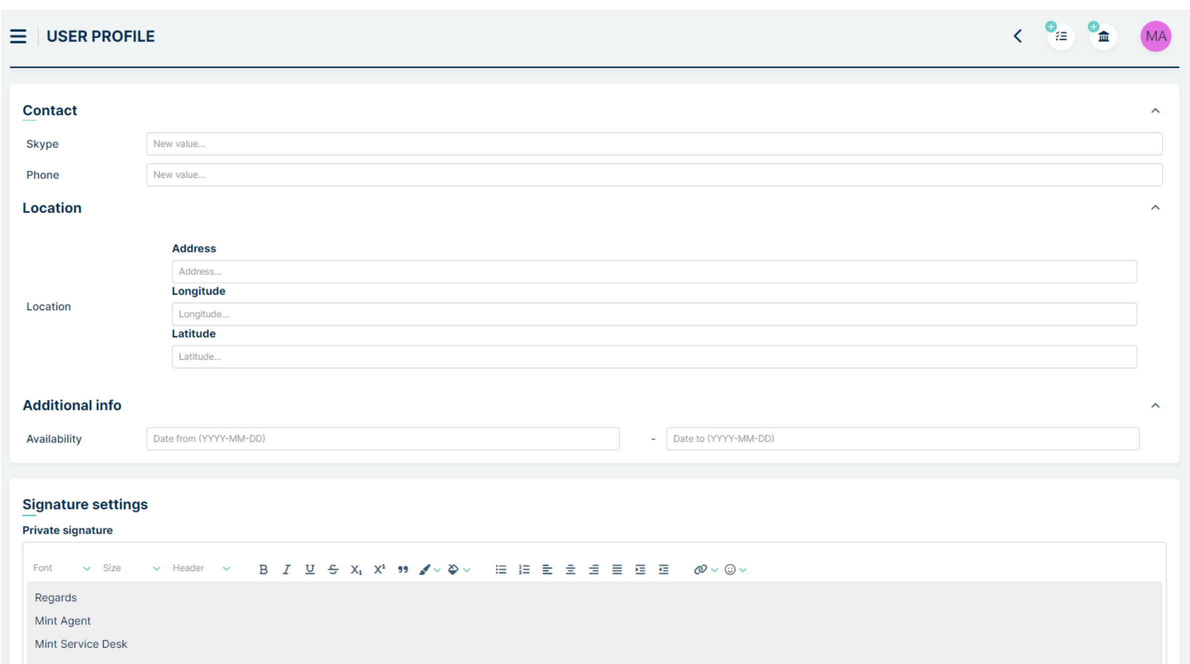
Default ticket answer properties (available for Agent and Customer)

This setting can be enabled or disabled in Admin profile in Settings > General > Tickets. This section pertains to the ticket details panel and currently contains Template setting - here you set the template that will appear in the first lines of the Description field after clicking on it in Ticket Details



Custom fields

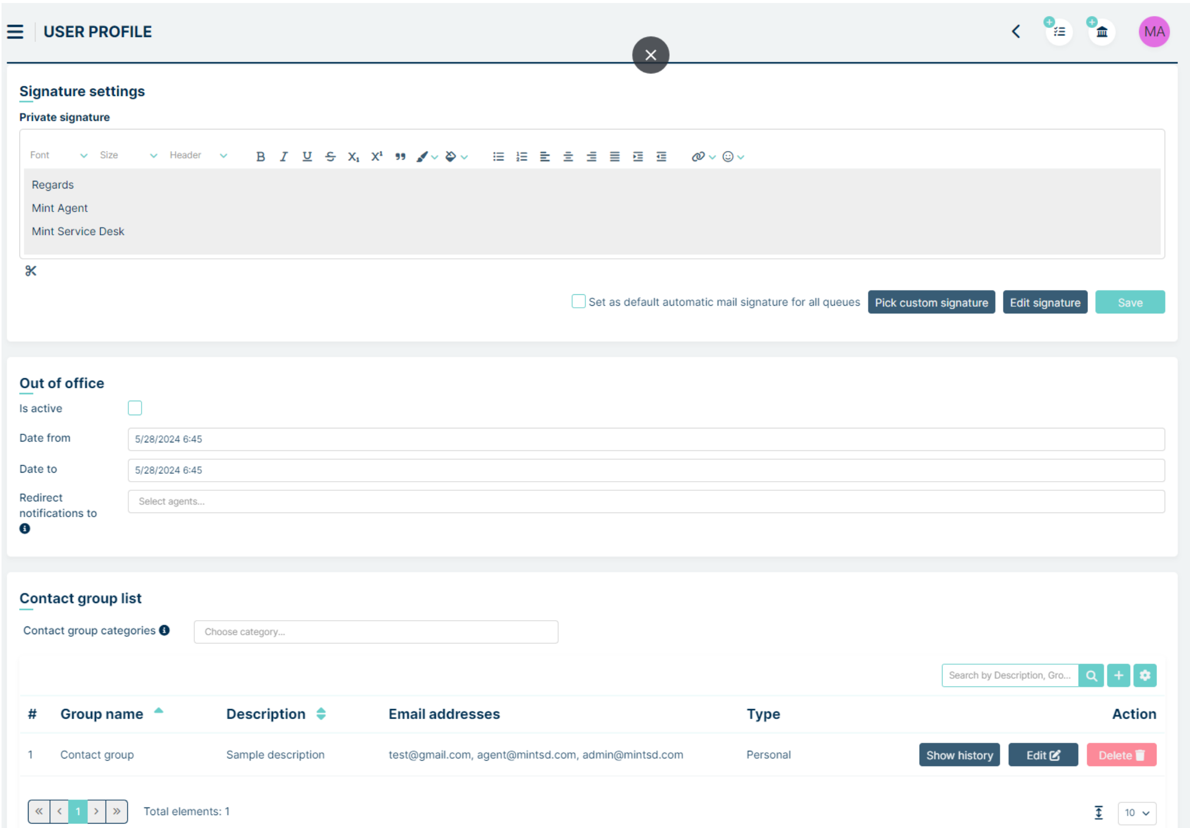
Above the section Signature settings field you will find section with additional information that can be created and managed in Admin > Agents > User fields – it will be explained later in this guide. By default there is nothing here, but once the Admin creates some fields, you (and all of the users) will see them here. They might look like the one in the following screen ('Contact', 'Location', 'Additional info' parts):



Next you have:

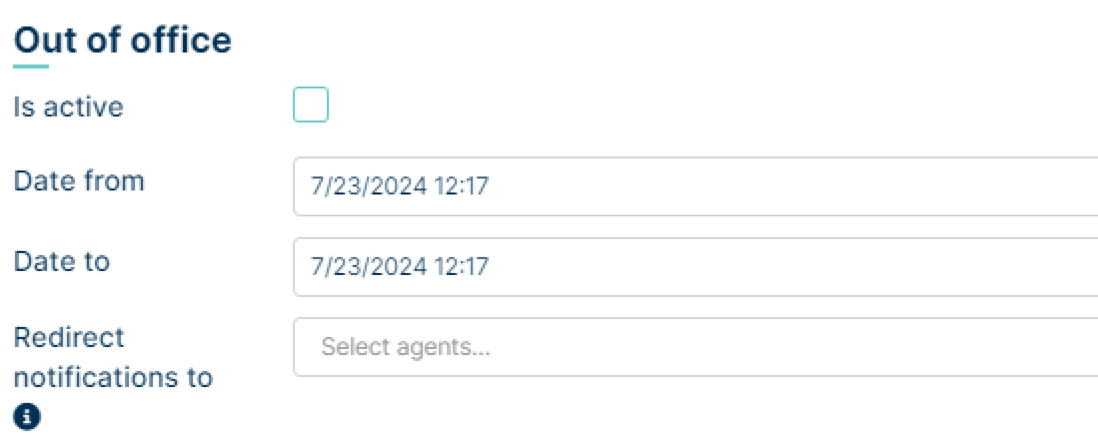
Signature settings (available for Agent and Customer)

In this section, you can flexibly configure our signature. By clicking the Pick custom signature button, you can use pre-configured templates set by the Admin in the Tickets > Signatures section. Any content, even that selected from a template, can be freely modified using the Edit signature button. In the signature content, you can use so-called snippets, which are references to values in the system, such as the ticket number, ticket creation date, or even values from the user's custom fields. Snippets are available under the scissors icon below the field containing signature content.

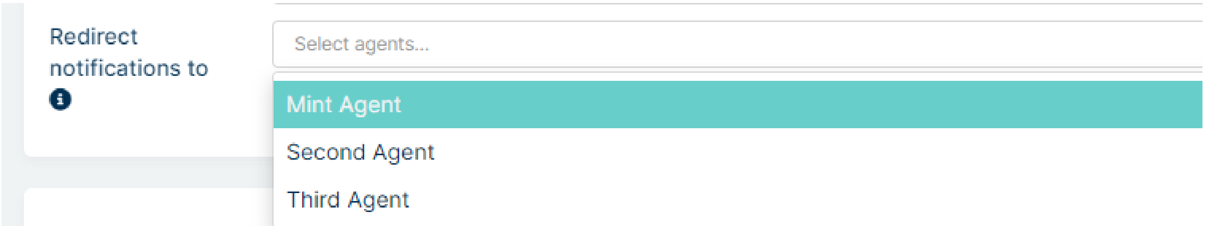


Out of office (available for Agent and Customer)

When you want to mark a period in which you will be unavailable, you can do so in the 'Out of office' section. All you need to do is to choose the start and end date of your absence and check the checkbox with the activation of this period.



If you would like to redirect notifications from tickets that you are assigned to another agent or agents during your absence, you can use the "Redirect notifications to" field. Clicking on this field will display a list of available agents.



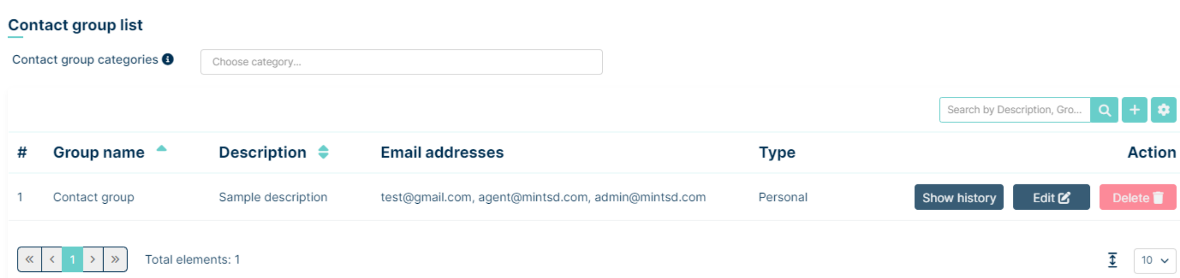
After selecting specific individuals and checking the "Is active" option, notifications from the tickets you are assigned to will be sent to the chosen agents. Remember that notifications will be redirected even if the selected target agent does not have permission for the ticket. In such a case, the agent will receive a message that they do not have permission for the ticket when they click on the notification.

Contact group list

In the 'Contact group list' section, you can create contact groups to use them in email section in ticket. The contact groups you create can be visible only to you or they can be shared with other agents.

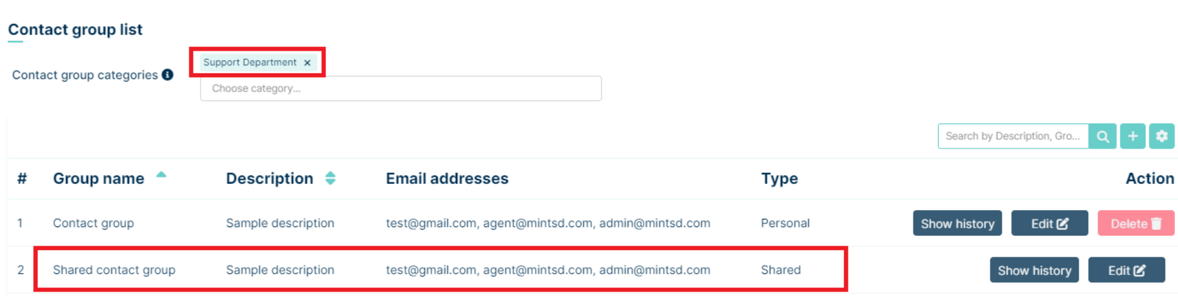
Note: The contact group option is only available to agents.

Below you have example view of Contact group list:



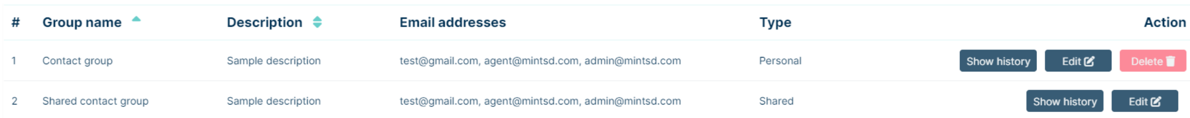
At the top left there is Contact group categories field

Selecting specific categories will cause related contact groups created by other agents to appear (go to 'Admin' => 'Tickets' => 'Contact Group Categories' to see how to create categories.)



In the right part there is a panel with Search by field, Add new group button and Set column properties button where we can configure column visibility and search field.

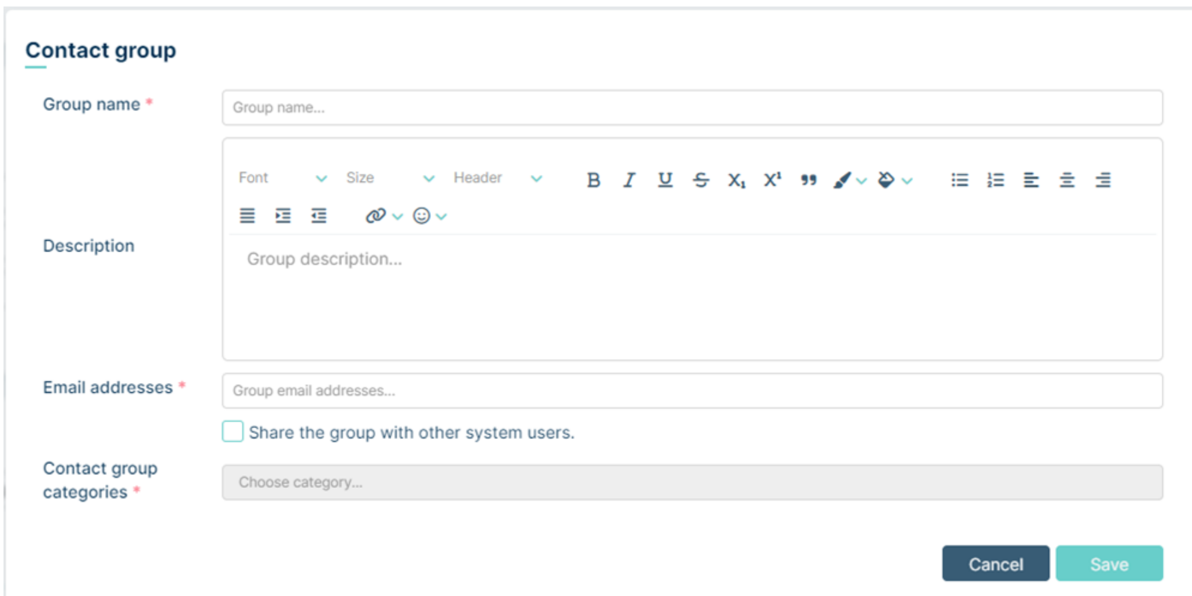
The main part of this section is a table with a list of contact groups.



#	Group name	Description	Email addresses	Type	Action
1	Contact group	Sample description	test@gmail.com, agent@mintsd.com, admin@mintsd.com	Personal	Show history Edit Delete
2	Shared contact group	Sample description	test@gmail.com, agent@mintsd.com, admin@mintsd.com	Shared	Show history Edit

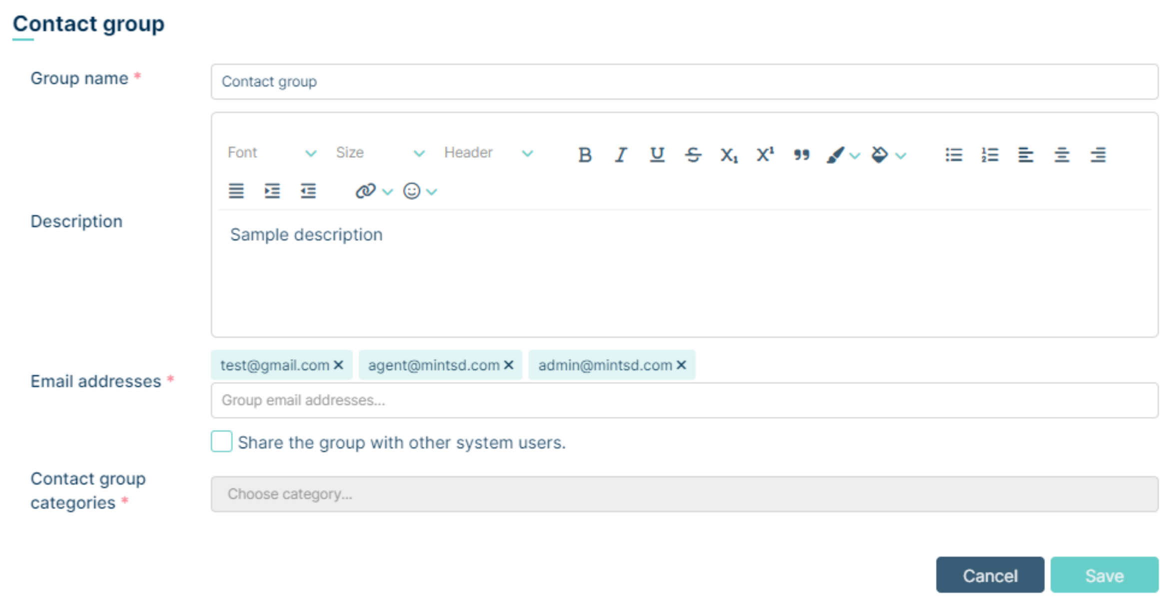
Here we have columns like Group name, Description, Email adresses in each contact group. There is also Type column where we can see which group is personal (visible only by us) or shared (visible by all agents). Last column is named Action – here we can see History of each group, we can Edit them and also Delete. Remember that you can only delete the groups you have created - you cannot delete a group created by another agent.

To start configuring groups, press the  button. When it is pressed, the configuration modal will be displayed.

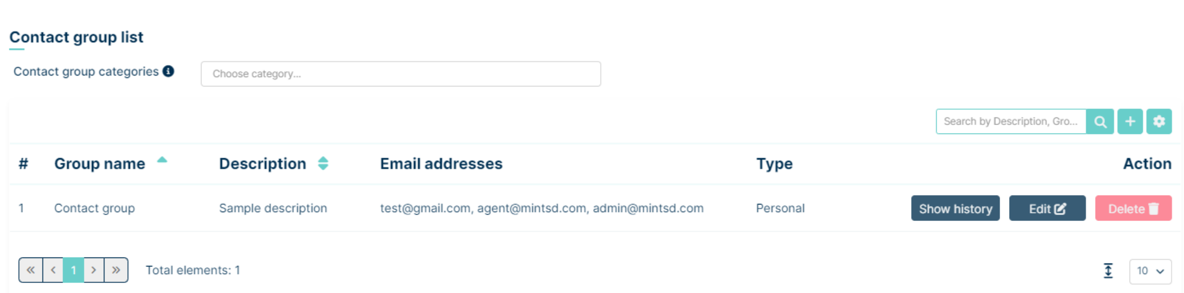


- In the **Group name** field, you give the name that this group will have.
- In the **Description** field, you set the description for this group.
- In the **Email addresses** field, you enter the email accounts that will be part of this contact group.
- In the **Share the group with other system users** checkbox, you choose if your new group should be visible for all agents (checked) or only for you (unchecked).
- In the **Contact group categories**, if you previously checked „Share" checkbox above, you can choose which category from the list your new group will be assigned to. You can assing your group to one or more categories. Categories must be predefined by the Admin in the Tickets > Contact group categories section

Lets try to add sample personal contact group. Fill fields like on screen below and press Save button.

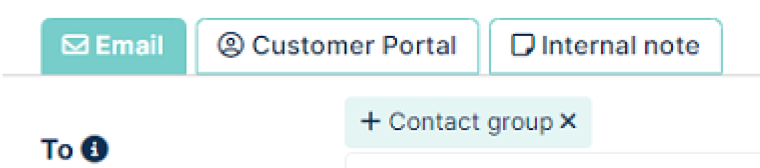


Your new group will appear on the list.



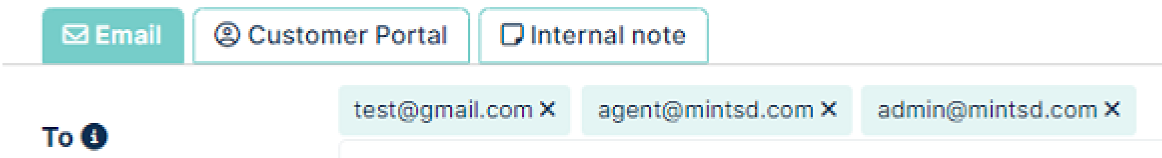
Now going to the email section, you can select the contact group.

When you add a contact group, it is displayed in the **TO** field.

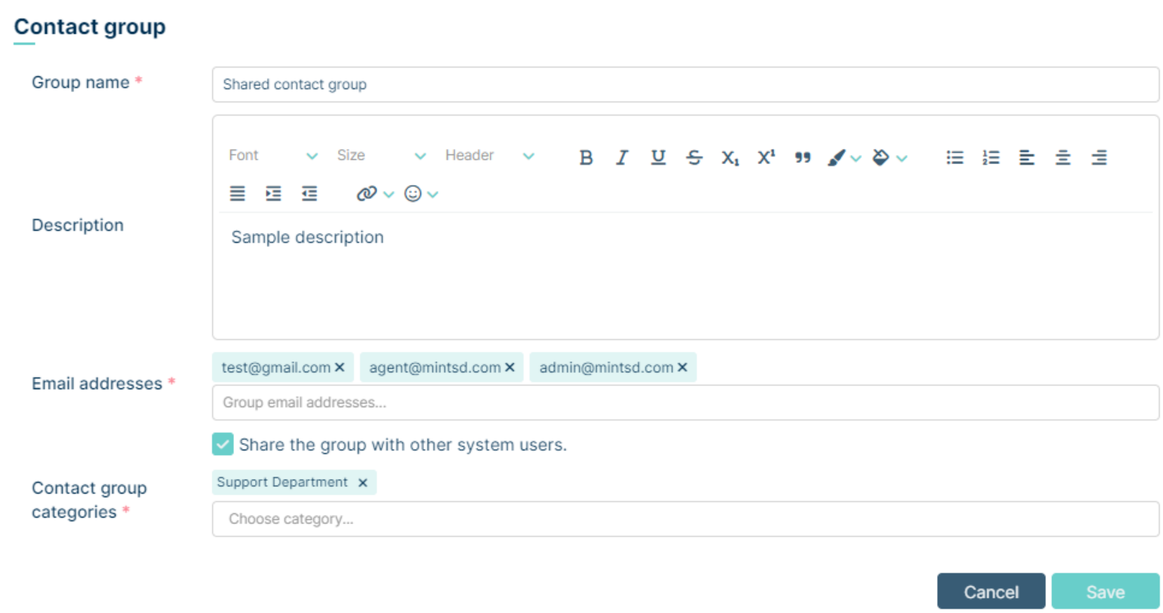


By clicking the **x** button, the group will be removed from the TO field. By clicking the **+** button instead of displaying the group, each single email will be added separately.

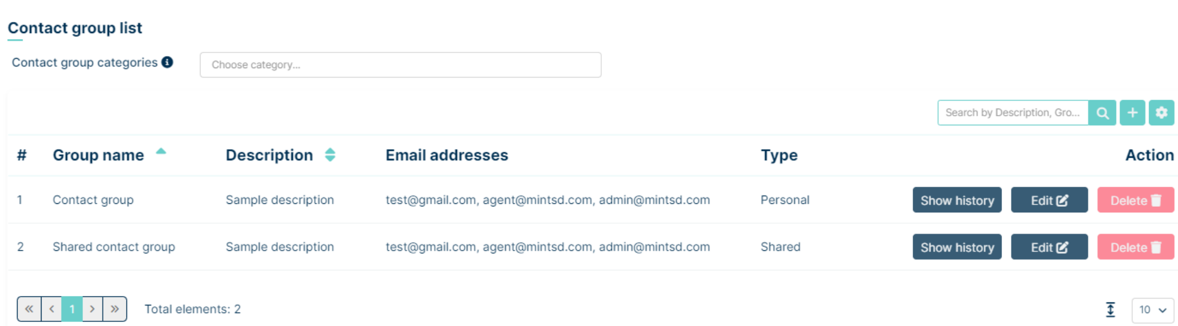
The effect of clicking **+**:



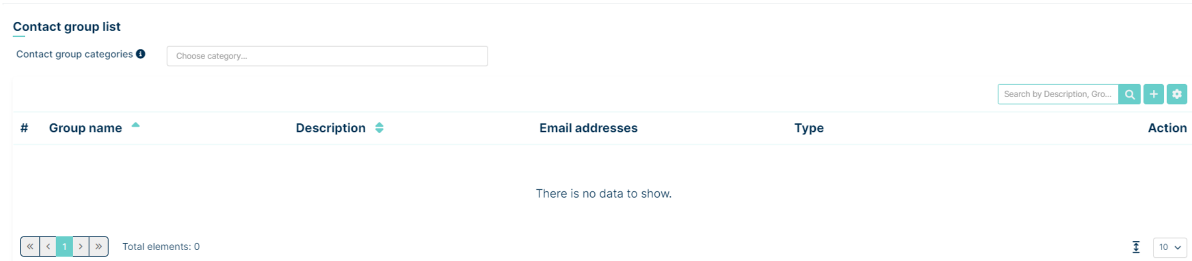
Now lets try create Shared contact group. Fill all fields like on screen below and press Save button



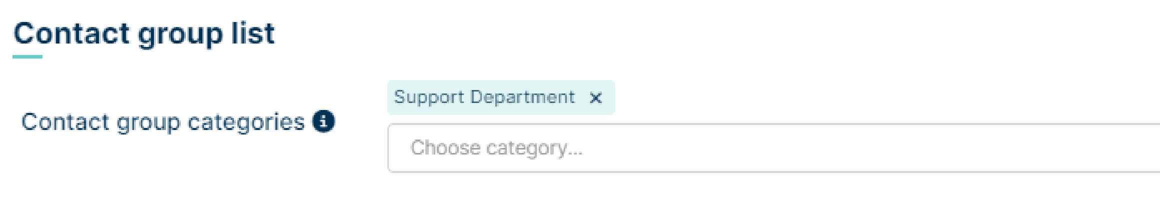
Your new group will appear on the list.



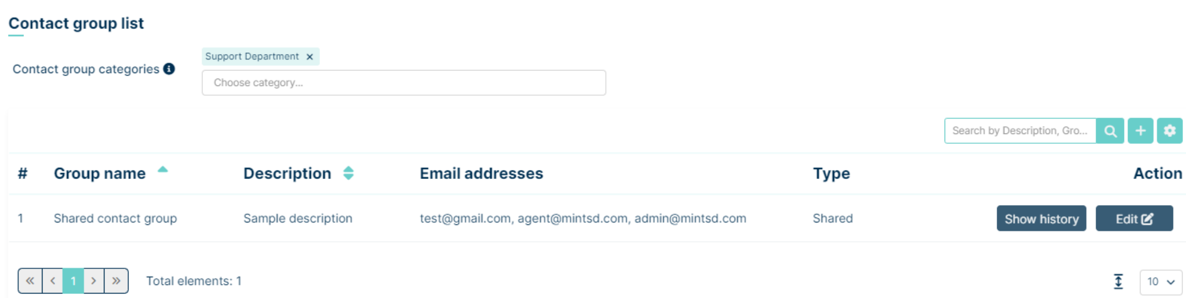
Your new shared group can be visible to all agents. Below is the view of another agent's contact group section:



In anoher agent would like to use our created shared contact group, he needs to choose category from the list that our group is assigned to:

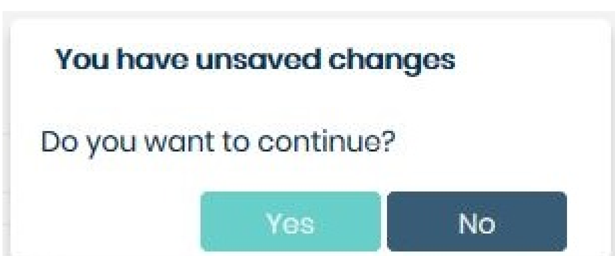


After that, our group will appear and will also be visible in the email section of the tickets



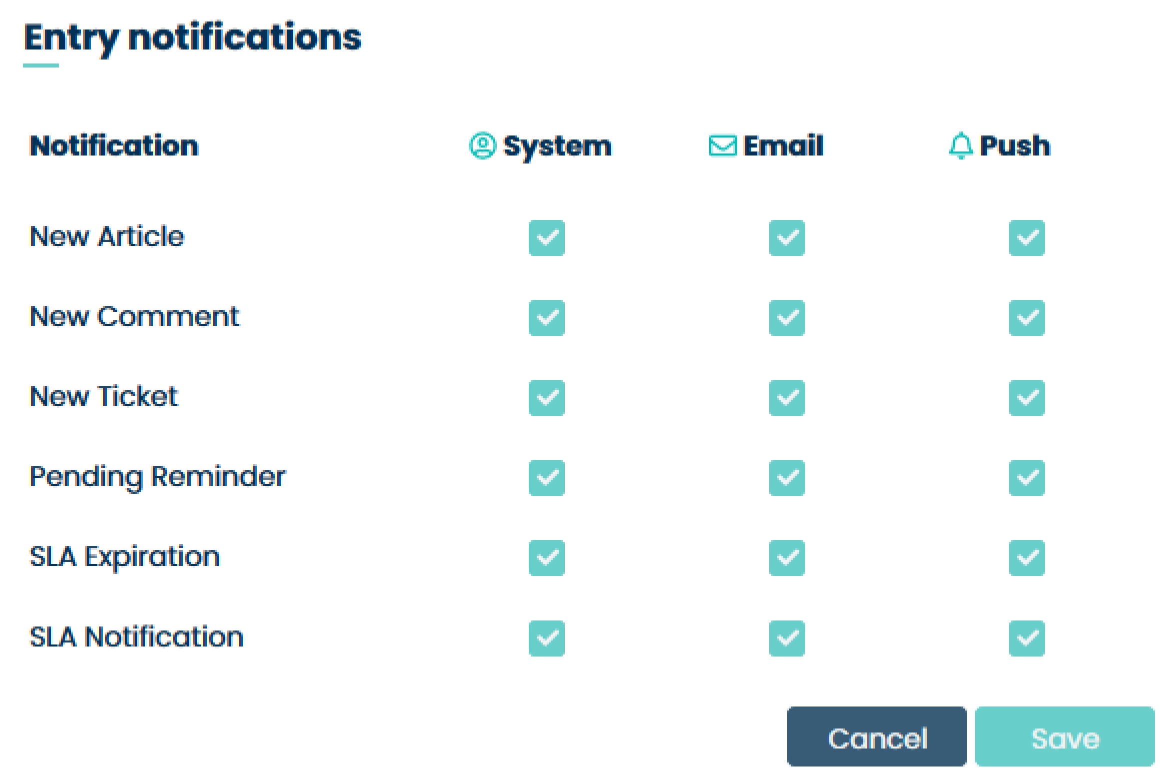
Always remember that after making any changes in your profile you have to click one the 

button to store your changes. If you forget to do it, the moment you try to leave this part of the system you will see the following message.



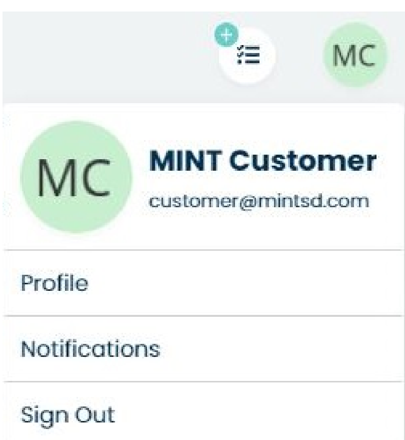
4.2.2 NOTIFICATIONS

Below 'Profile' button you will find another position: 'Notifications'. Right here you the notifications which were allowed for you to receive (admin user can change that). If you don't want to receive any of them simply unmark the correct position.



4.2.3 SIGN OUT

If you want to log out and close your session on **MINT Service Desk**, just click on "Sign out" and the system will close your session and lead you to the main login screen.



4.3 CLIENT PORTAL

The client portal is a user-friendly interface where clients can see their tickets, create new tickets, and check the list of available assets.

4.3.1 CUSTOMER PORTAL

The Customer Portal is a module that enables customers to efficiently create requests using templates predefined by the Administrator. The module's visibility is determined by the settings in the Administrator's profile.

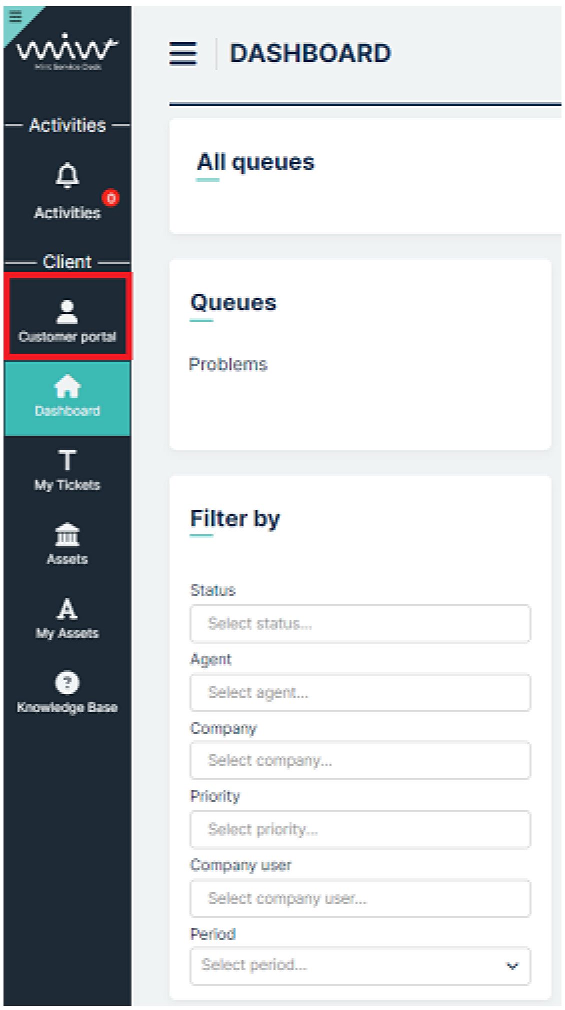
The module consists of:

Cases: These are templates created by the Administrator.

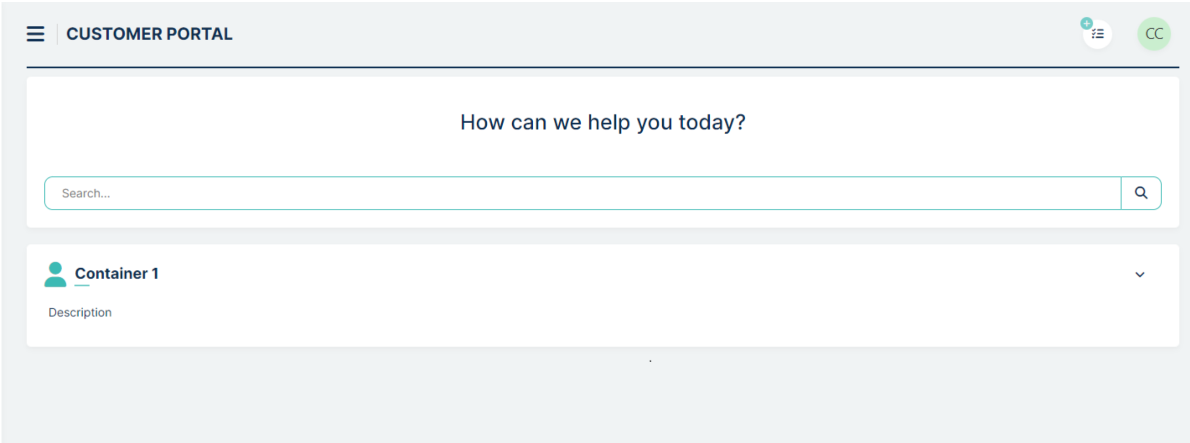
Containers: Here, you can assign and group the cases mentioned above.

Customers have the ability to create tickets through the Customer Portal, even if they don't have permissions for queues or ticket types.

To begin using the module, simply click on the Customer Portal button located in the left sidebar.



In the Admin profile we can set the Customer Portal to appear by default as the first screen after Customer logs in



At the top, you'll find a 'Search' field that allows you to quickly locate any case. You can search by:

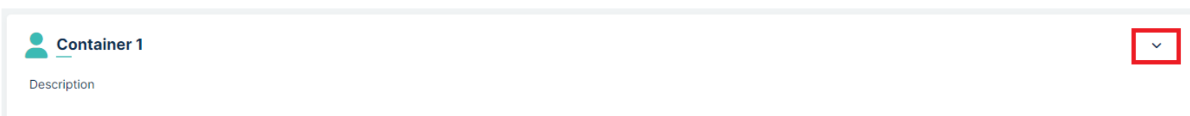
Container name

Container description

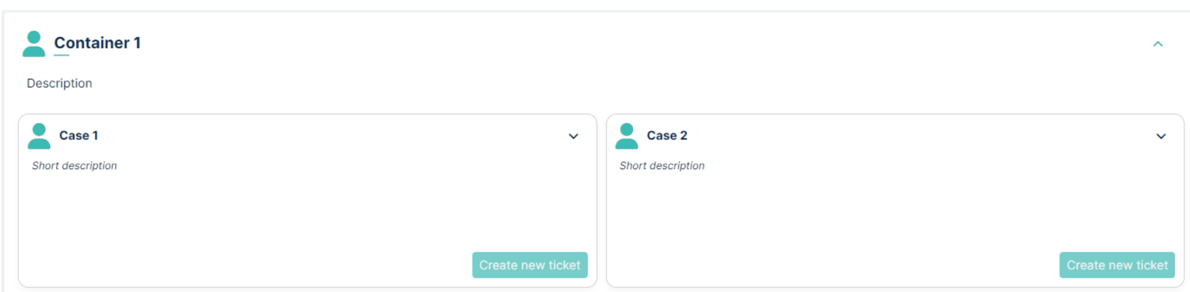
Case name

Case short and long descriptions

Below the search field, you'll find the container view. Each container includes a name, a short description, and an image or icon assigned by the Administrator. On the right side of the container, there is a button that expands the list of issues.



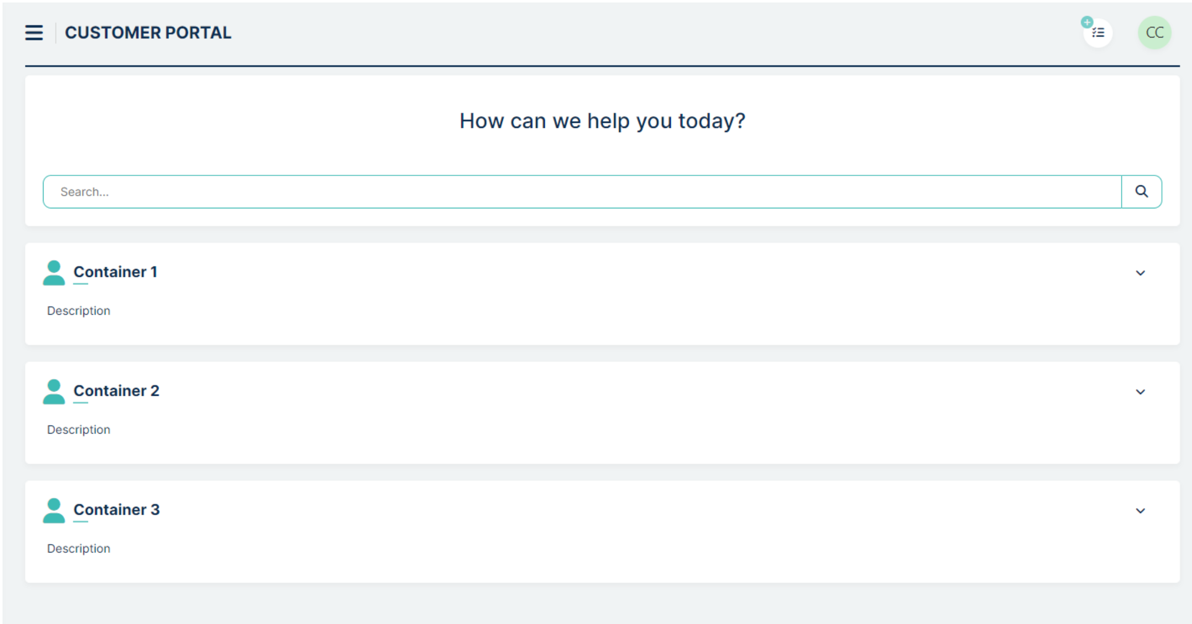
Clicking on this button reveals the case name, a brief case description, and the associated picture or photo assigned to the case



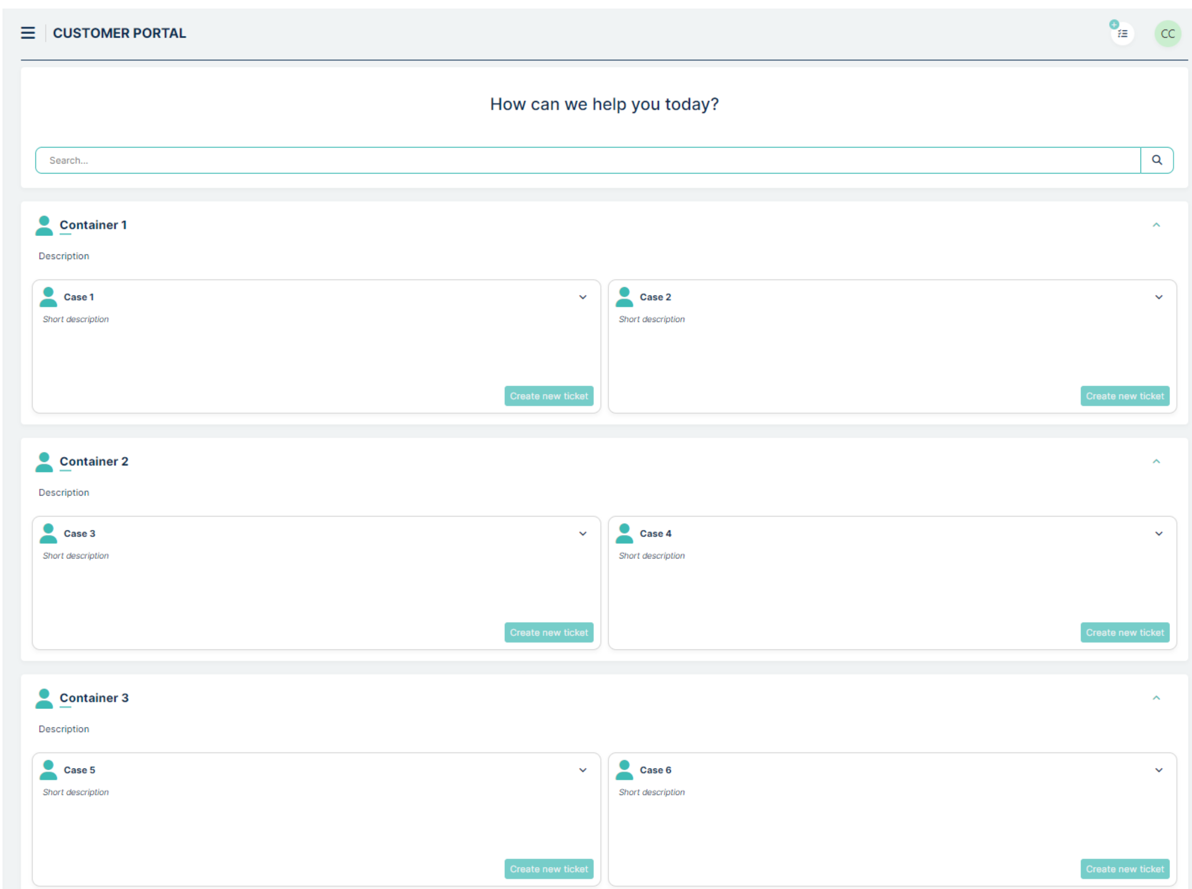
At the bottom right of the case, you'll find the 

button and the expand list button. Clicking the expand list button reveals the long case description text.

In the Customer Portal module, you can easily add a variety of containers and cases. An illustrative view of the containers list is provided below:

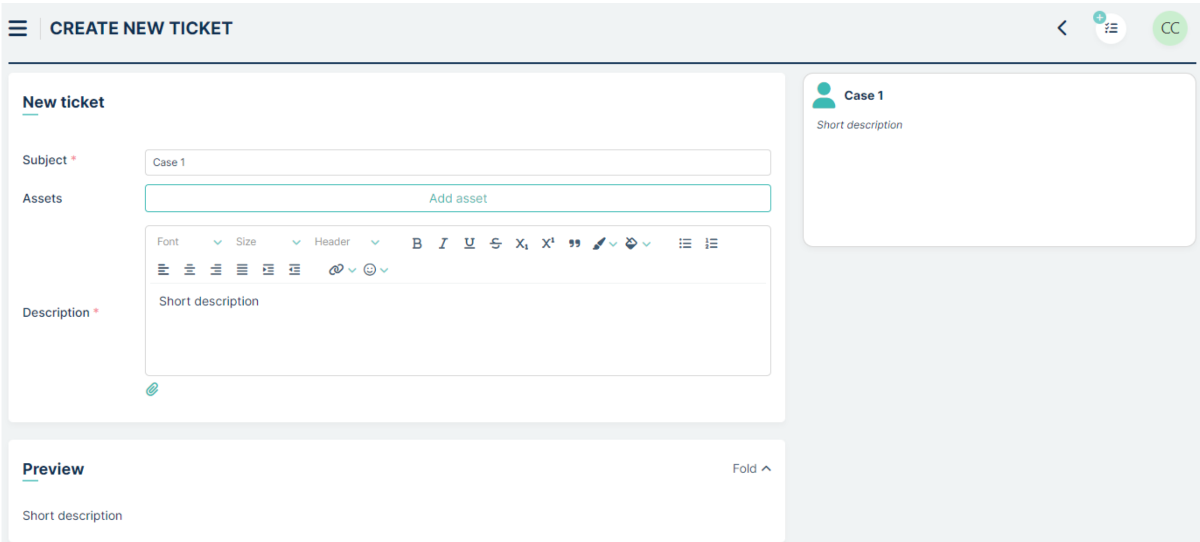


and with expanded containers:



In the Admin profile, we have the option to set the default collapse or expand view for each container and case.

Now, creating a ticket is straightforward. Simply select a case and click on Create new ticket. A new window will appear.

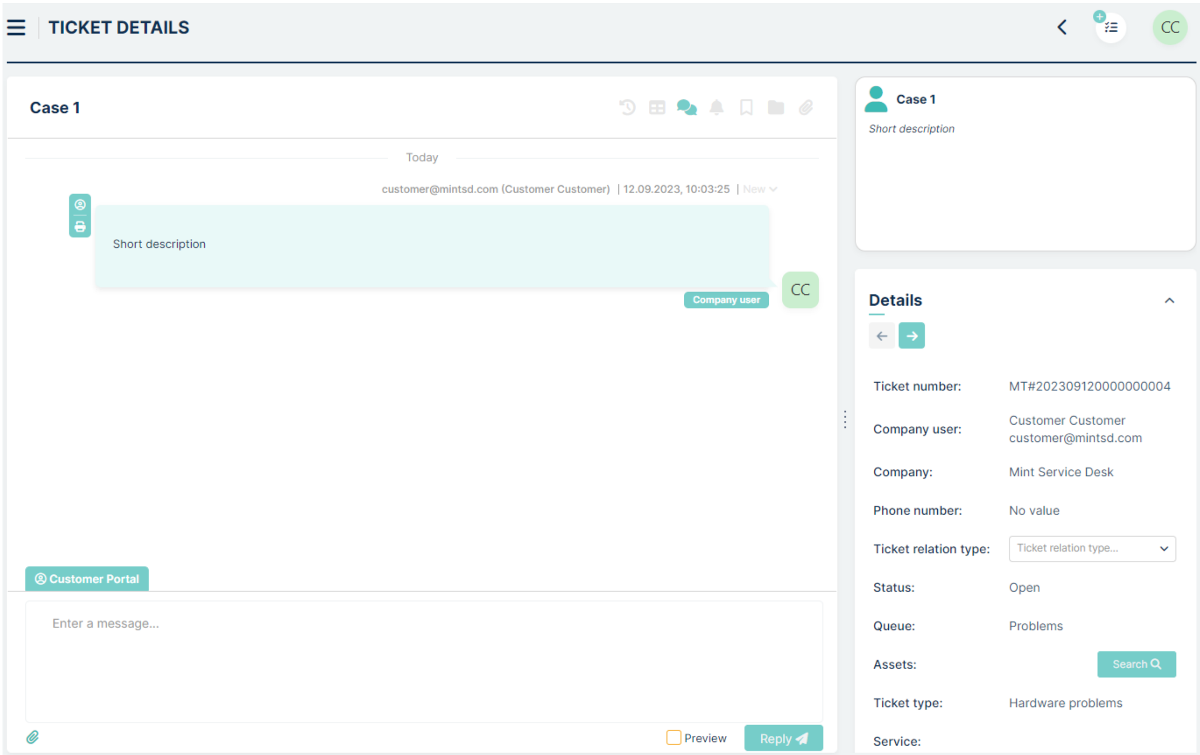


The "Subject" field is automatically filled with the case name, and the description contains a brief description of the case. Both of these fields are editable. Additionally, you have the option to add attachments and assets.

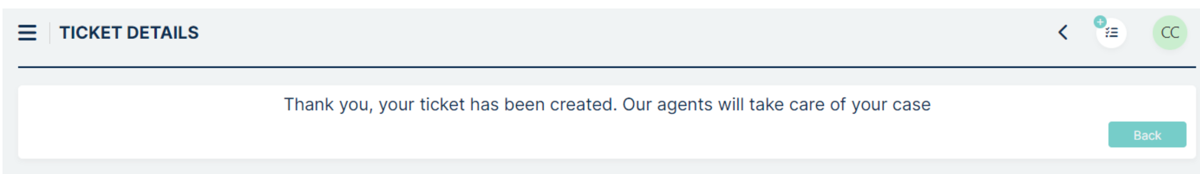
In the top right corner, there is a tile displaying a preview of our case template.

The process of creating a ticket is concluded by clicking the Create button in the lower right corner. After clicking this button, you have two options:

– You can view the details of your ticket if you have the necessary permissions set by the Administrator for the ticket type and queue.

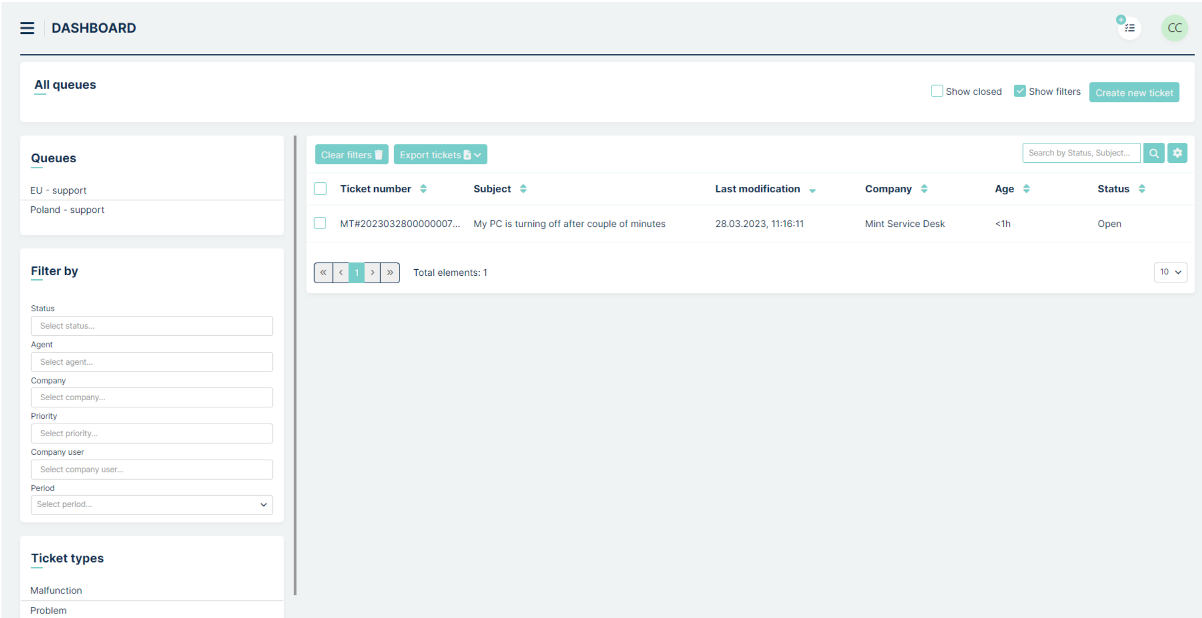


– you can see the info that our case will be proceeded by agents



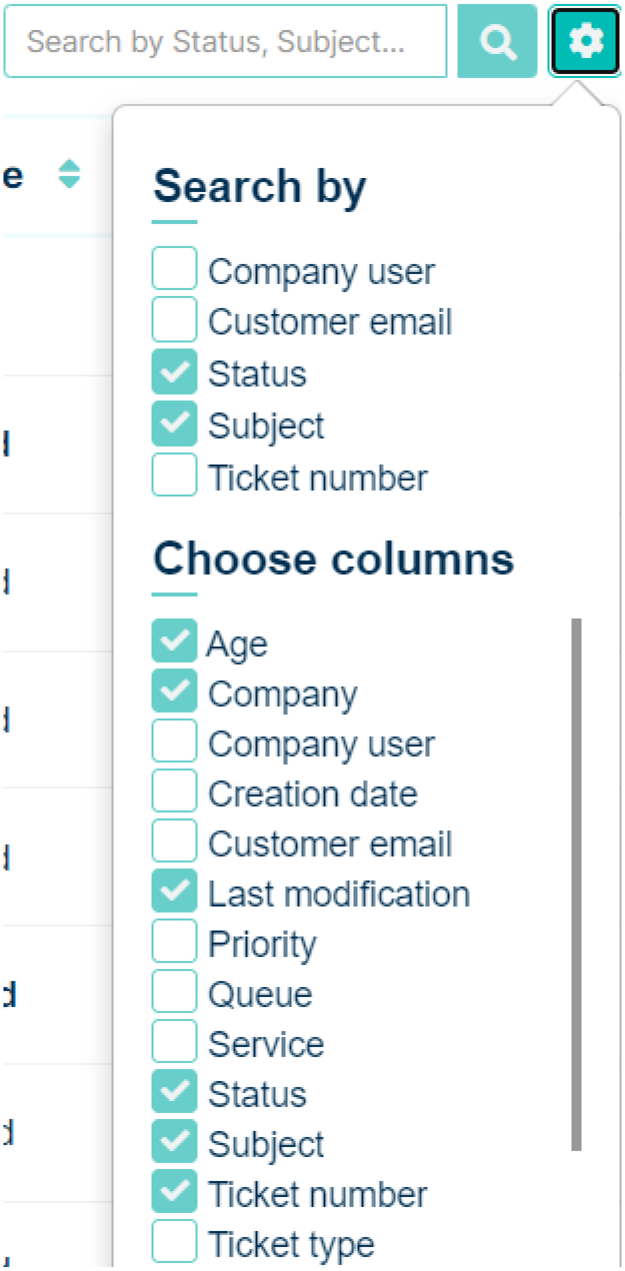
4.3.2 DASHBOARD

The first view after login is called "Dashboard". It displays the tickets that the client is able to see, those can be "My tickets" or tickets from the same company created by another colleague.



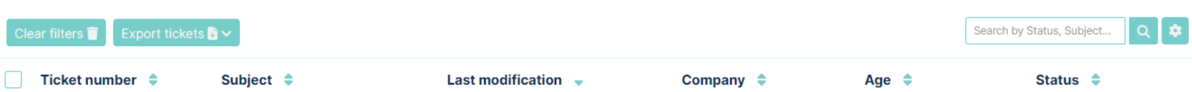
You can filter the tickets listed by 'Queues', 'Ticket type', 'Status' and 'Period', or choose to sort tickets by different attributes like "Ticket Number", "Subject", "Creation date" and more. To do so just click on the column name. You will notice that each time you do that a small icon next to the column's name will change: -> ->

The attribute columns you see can be added or removed in the section "Set column properties" on the right side by clicking on the button. Once you do that you will see a small window, where you can select the desired information you want to see on the tickets list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.



Also, you can look for specific tickets using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.

In the upper part, above the tickets list, you will see a  button, which will allow you to reset the view and remove all of the active filters.



If you want, you can export the list of your tickets and save in one of two file formats: .CVS or .XLSX. To do that, just click on the 

button and select one of the 2 available file formats.

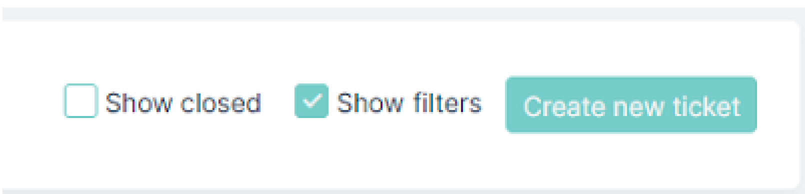
Now, in the new window click ‘Save’ to save the file in your browser’s default download catalog.

Once you open the file it will contain tickets information such as: ‘Ticket number’, ‘Id’, Subject’, Creation date’, ‘Last modification’, ‘Company’, ‘Status’, Customer’, ‘Queue’, and ‘Assignee’.

If you like to see or hide tickets that have already been solved and closed, you can always mark/unmark the option 

. The same situation is for filters located on the left - you can always hide and unhide them by 

button. Both of these checkboxes are located on the right side of the Dashboard screen.

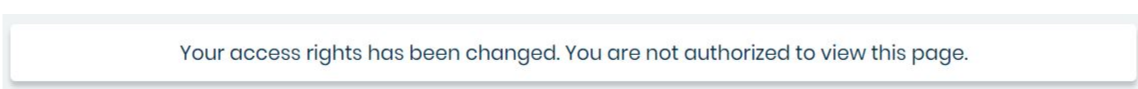


When you have plenty of Tickets on the list, you will have to use some additional navigation options, located below the list of Tickets, for moving between pages or for changing the number of Tickets that can be displayed on one page.

On the left side, you have the navigation buttons, while on the right side you can change the number of tickets per page (5/10/15/20/25/50 or even 100, by default you will have 10 Tickets per page). Those options are available in many places in Mint Service Desk.

One more important thing is that you can click on any attribute of the listed tickets on your dashboard and that will take you to the “Ticket Details” of the selected ticket.

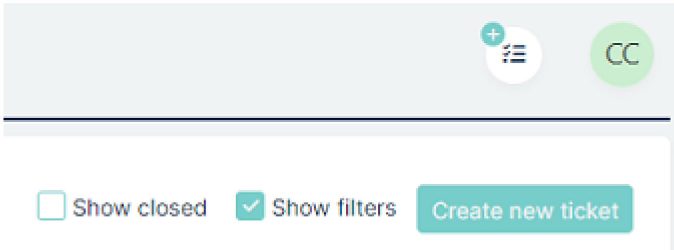
Last, but not least, if you ever see the following message, while trying to access any Ticket or Asset, it means that the Admin user has changes your access rights and you need to contact him and ask for help.



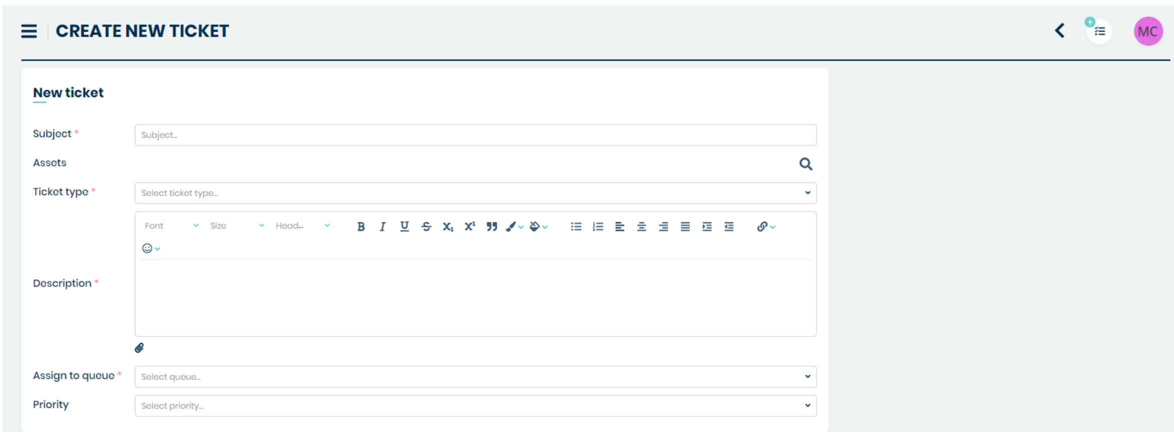
4.3.3 NEW TICKET

On the top right side of the Dashboard screen, you will find two shortcut icons:  and 

.



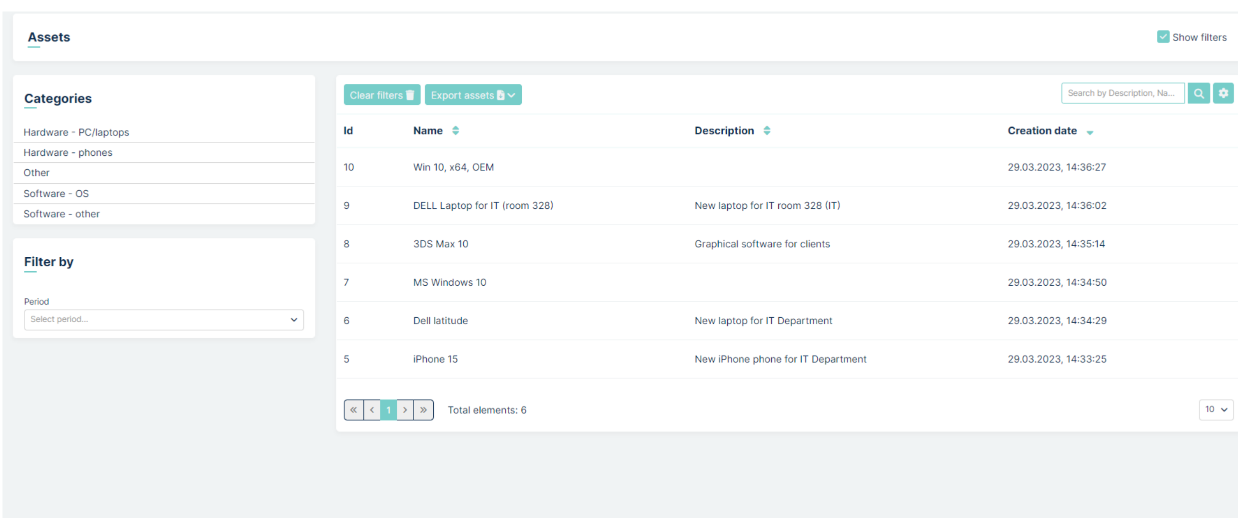
Click on one of them and the new 'Create new ticket" screen will be displayed.



Right here, you will need to fill up some required (marked with a *) information such as:

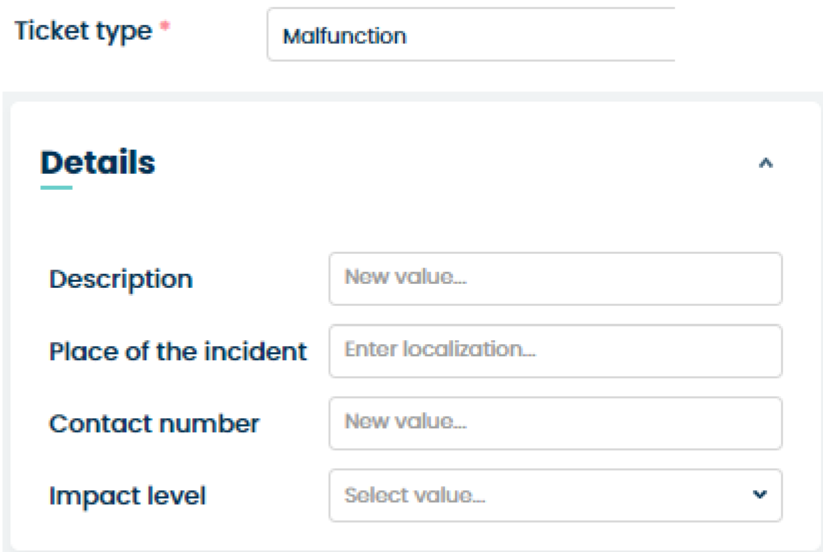
- "Subject" (a short description of your incident or request)
- "Description" (detailed information about the problem, your need, etc.)
- choose a right 'Ticket type'
- assign the ticket to a right queue by selecting one on the 'Assign to queue' list.

In this place, you can also add the Asset (from those which are available for you) if the problem is happening strictly on a specific device. Once you click on the magnifier icon you will open a new window where you can search and select assets you want to assign to your ticket.

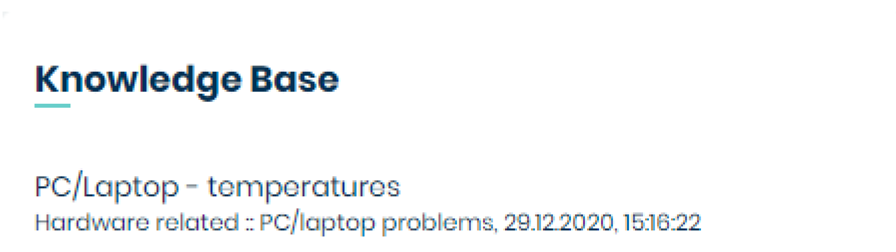


Apart from the above you can also choose a 'Service' (along with SLA/parameters/priorities which are specified individually for each service), add some attachments (pictures, screenshots, .zip files, docs, etc.), and select a 'Priority' of your ticket.

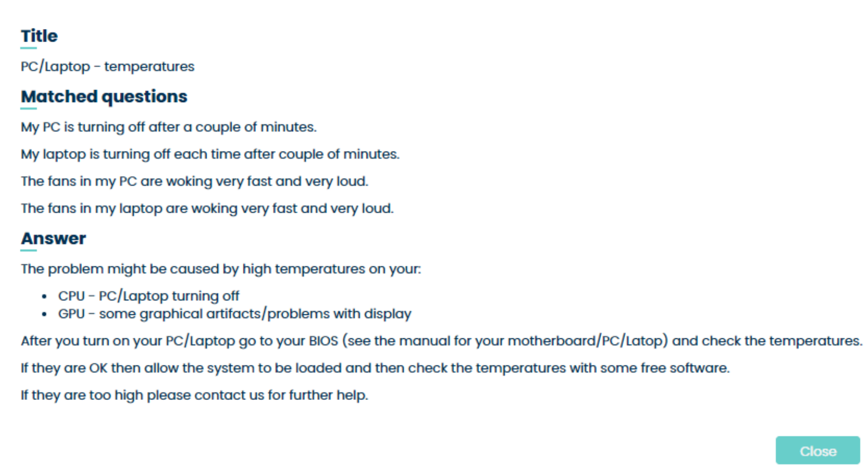
If you chose a 'Ticket type' which includes some additional attributes, you will see, that on the right side of a view a new block has appeared, containing some fields and other options, where you can add even more information.



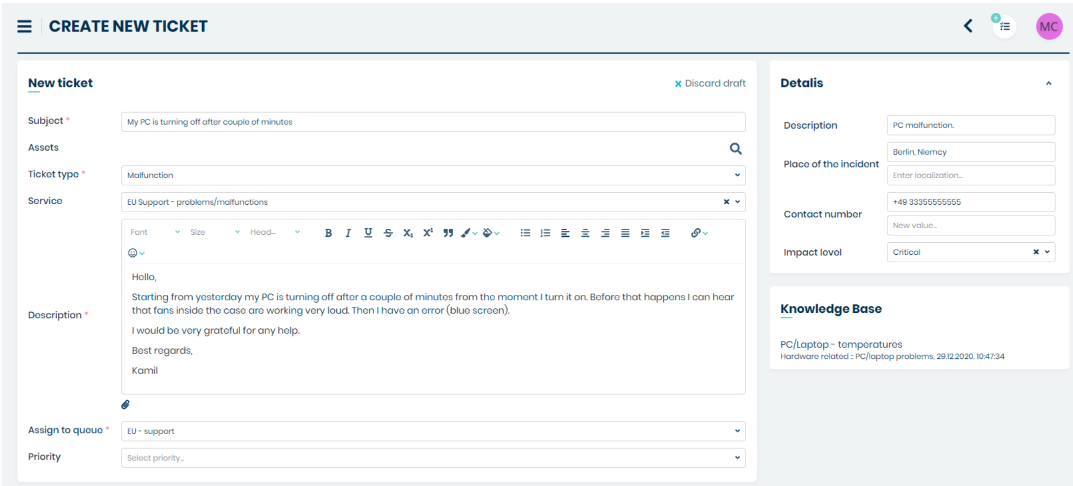
Take notice that once you start typing the text in the 'Description' field you might see a new block 'Knowledge Base' on the right side. There is a chance that your question/problem has already been described or solved in the Knowledge Base section so if the system finds the right topics (based on the words you type) it will display them immediately for you.



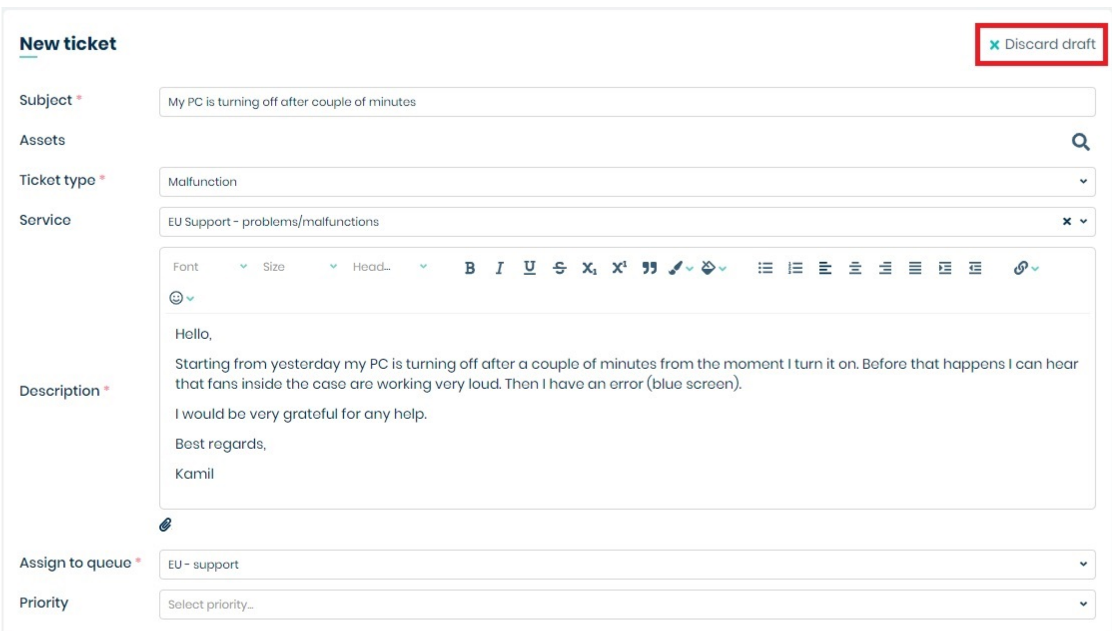
To see details just click on any of the topics and you will see detailed information.



Once you finished with adding information the view should look like in the following screenshot.



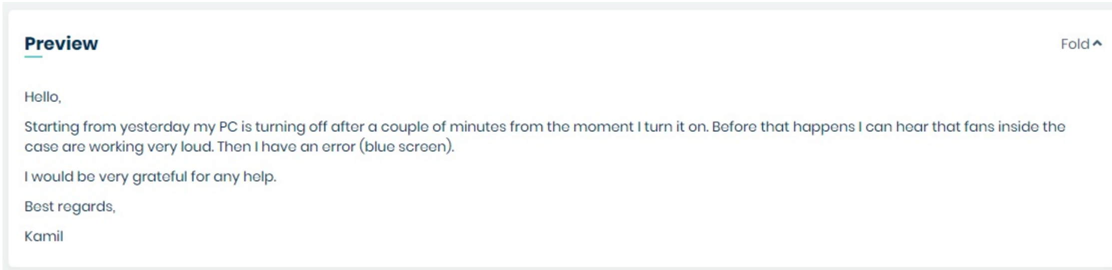
If, for any reason, you decide that you entered the wrong text inside 'Subject' and 'Description' fields you can delete their content very easily. Just click × Discard draft located in the upper part of the "New ticket' section.



Once you do that, the 'Subject' and 'Description' fields will be cleared.

Before you create a new Ticket there is one more thing you need to know. Mint automatically remembers the content of the two abovementioned fields. When you accidentally leave the "Create new ticket' view you're not losing the content of those two fields. Once you go back to 'Create new ticket' view you will notice that 'Subject' and 'Description' are filled with the same text you entered.

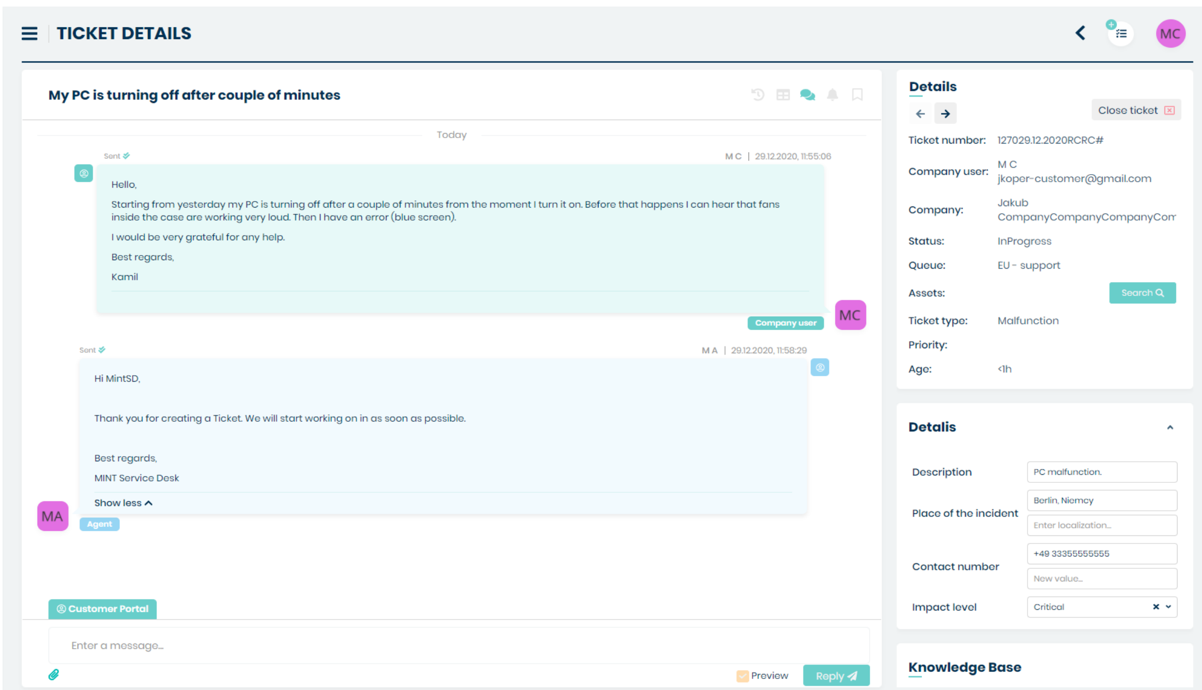
When you're creating a new ticket, you can see how it's gonna look like by simply scrolling the view down..



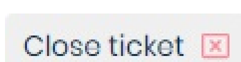
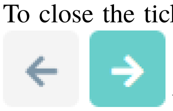
Now, once you're done with everything, just click on the  button (right bottom corner) to create your new ticket and wait for Agent's response.

4.3.4 TICKET DETAILS

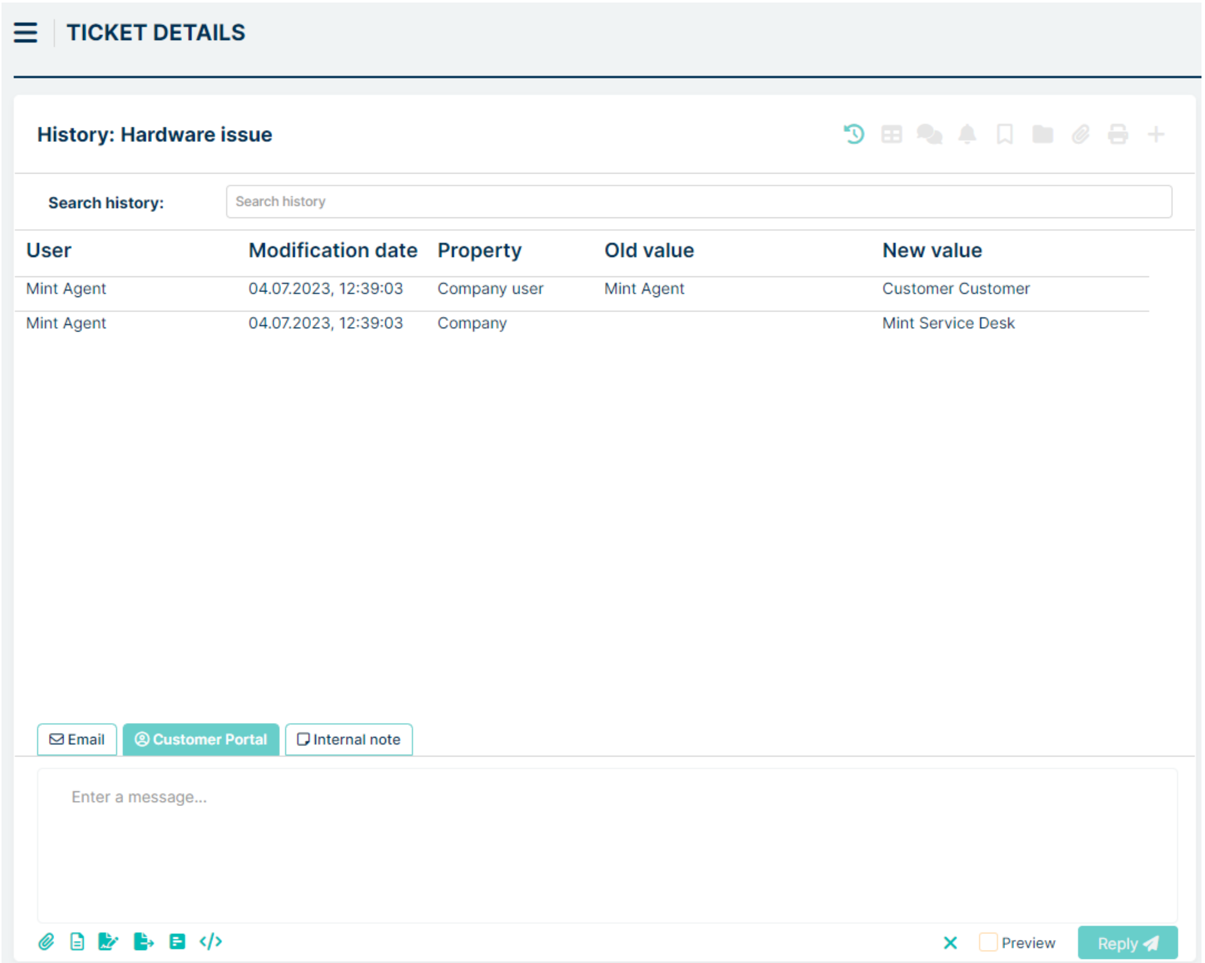
The moment you create new ticket you will be automatically moved to 'Ticket details' view where you will find the whole communication and all additional information regarding this ticket in one place.



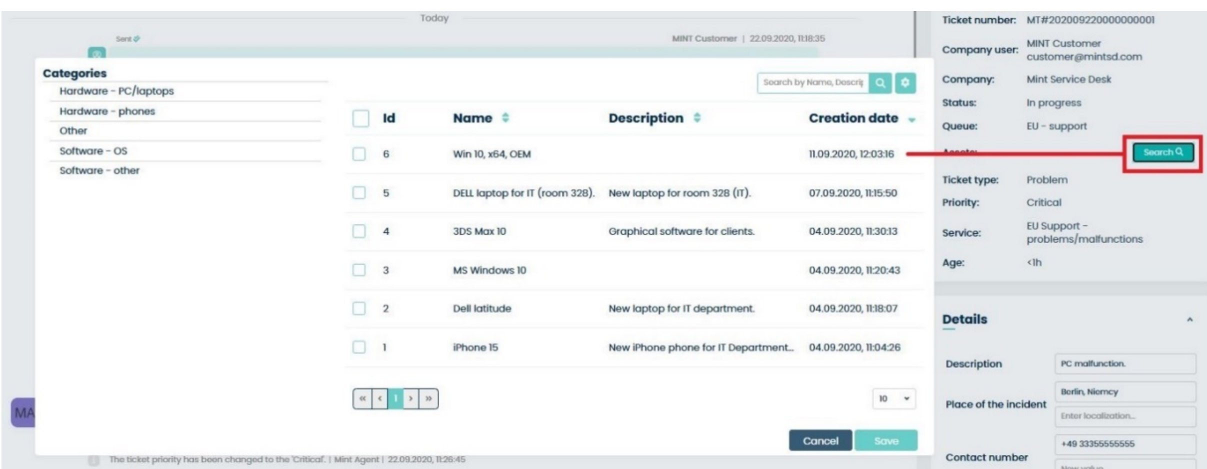
All of the information about "Ticket number", "Company user", "Company", "Status", "Queue", "Assets"," Ticket type", "Priority", "Service", "Age" are located on the right side in 'Details' section.

To close the ticket, click the  button in the top right corner. Next to it there are two buttons  which are used to switch between tickets.

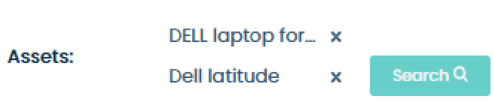
To view the ticket history, press the button. A window will appear where you can see its history. Ticket type, service, queue, etc. changes will be shown here



Take notice that the attribute "Assets" also includes a search option that you can use to look for a specific asset very quickly and link it with the ticket.

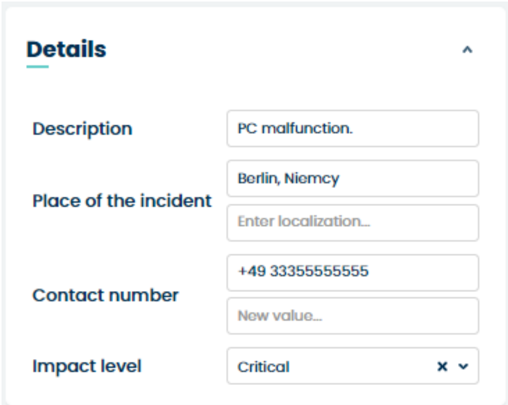


Once you choose one (or more) and click Save those assets will be visible in the 'Assets' part of the 'Details' section.

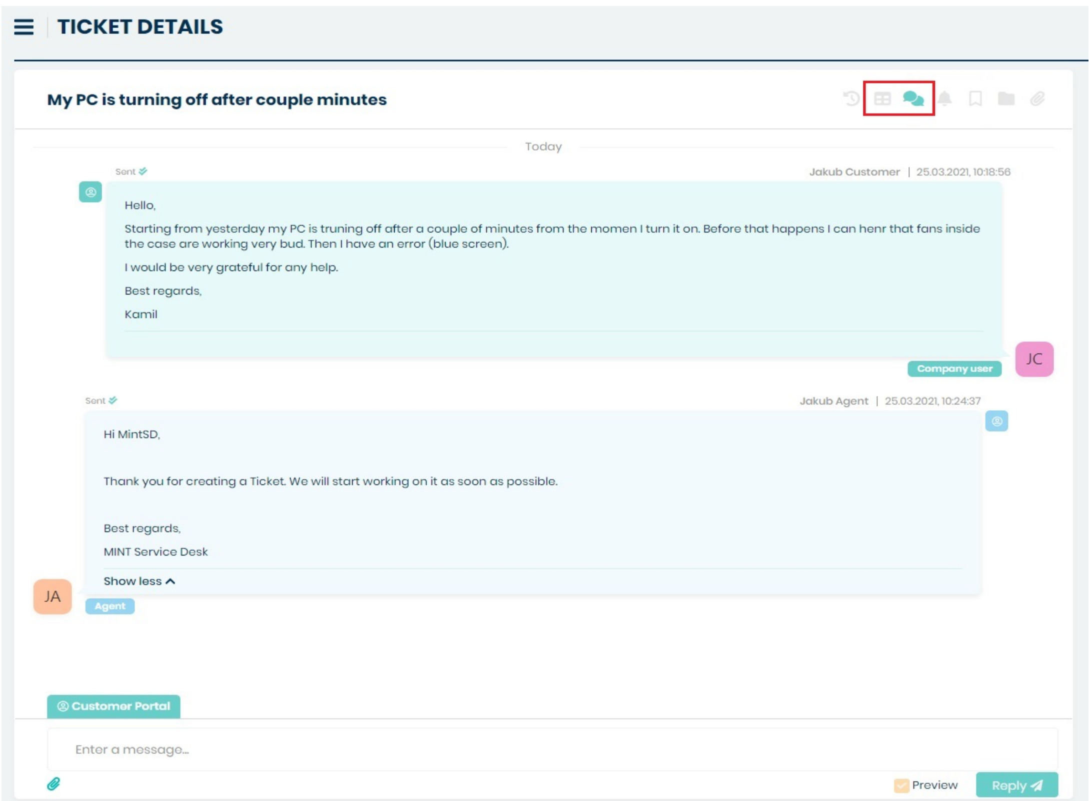


If you click on any of them it will open a new window where you will see details of this chosen Asset. If from this place you click the button inside you will go to the 'Edit asset' view where you can change the assets details (if you have the required rights).

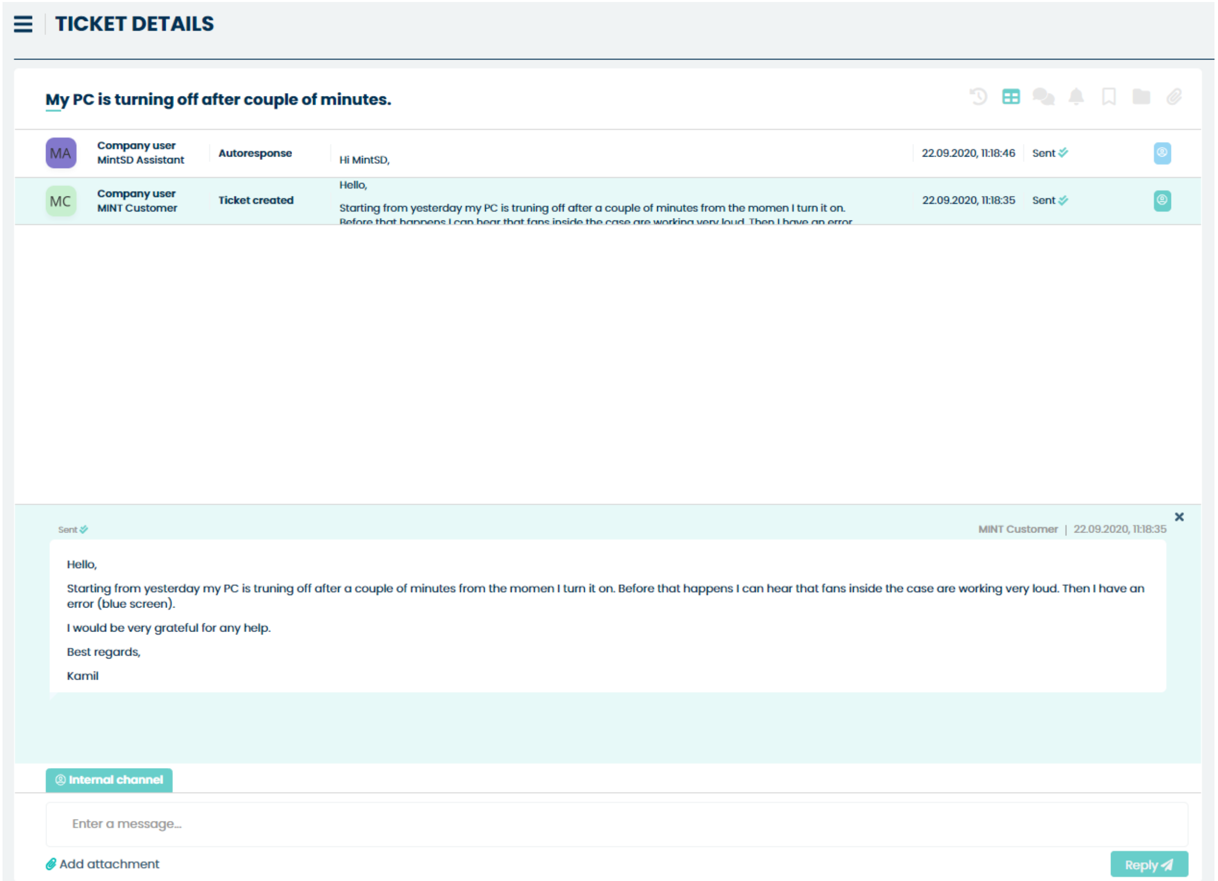
Below the 'Details' section, you might find some additional attributes/information related with the "Ticket type". They can be created and managed by the Admin user in Admin > Tickets > Types section – it will be all explained later in this guide.



The messages and details of the communication takes the most space in the 'Ticket details' view. Messages can be displayed in a framed or chat view by selecting one of them .



If you switch to a framed view (chat is set as a default view) you will see the list of messages. To see details of one of them just click on it (screen below).



The other two buttons next to chat/framed view are used for the 'Notifications timeline' and Subscribing/Unsubscribing the ticket.

If you click first of them () you will see a small window containing the history of notifications created for this one particular ticket. If you want to see previous activities just click the 

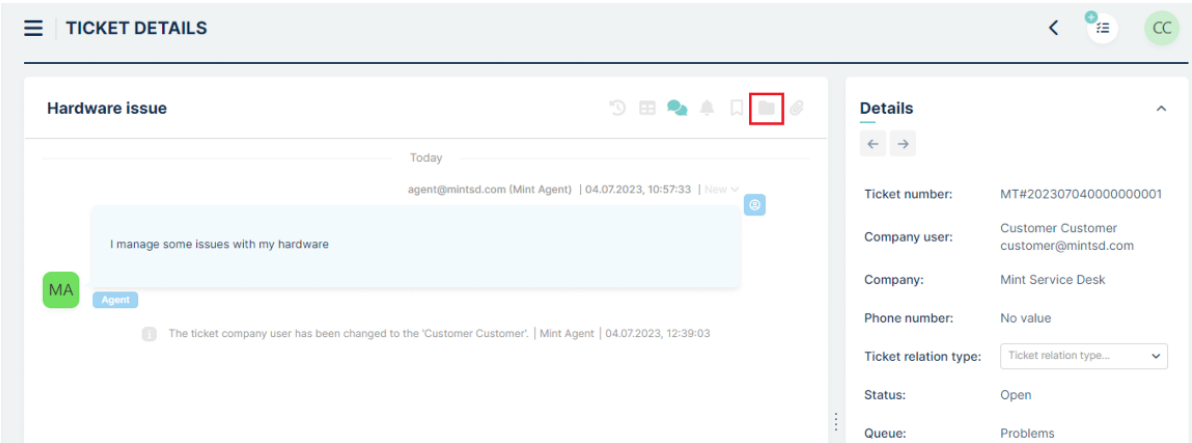
button.

The second one (), once activated will send you notifications each time something new happens within the ticket.

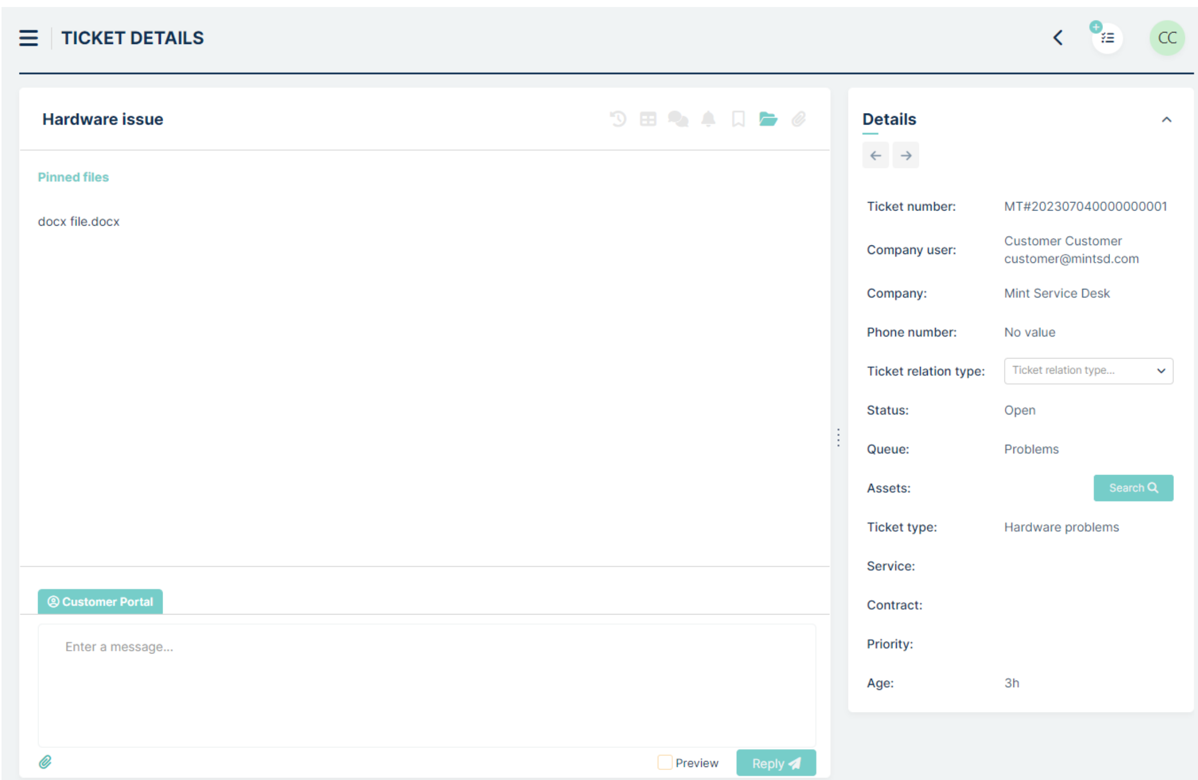
Next button is the **File Repository**

File Repository is a place for the orderly storage of "MINT" application documents. Each user level has different options for dealing with files from the repository. The customer can download files if they are assigned to a given ticket.

Let's check File Repository as Customer. First step is to enter to the ticket details. Here we can see an icon like below



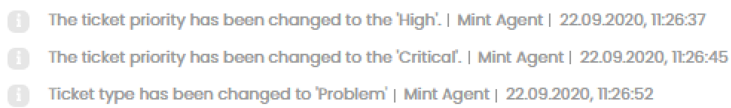
We can click on it and enter to File Repository tab. Here we can see files pinned by Agent.



To download file we just need to click on pinned file. Whole downloading process is similar as in Agent's profile and is described there.

Let's take a look to chat section. If the message inside the chat contains a lot of text it will we shortened – in order to see the whole text you need to click Show more .

Except for the messages, in the chat section, you will see some additional information e.g. when an Agent decides to change the ticket Status or its Priority.

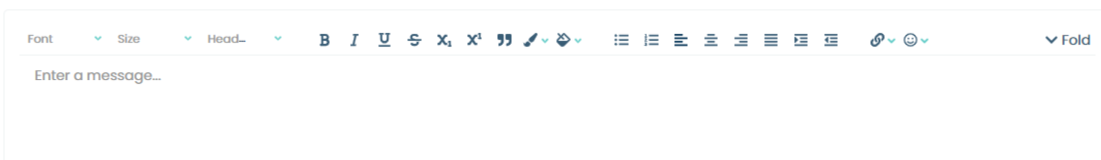


Now, if you want to type and send a message, just use the 'Enter a message…' field below the Chat section.

Type the message, add some attachments ('Add attachment') if you want, and click 

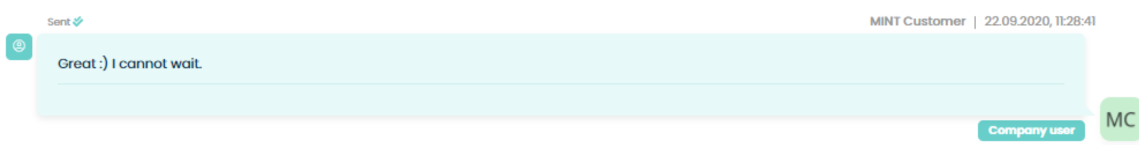
button.

You can also format your message by using the text editor, which will be displayed the moment you click on the 'Enter the message…' field.



When you're ready just click the 

button and the message will be sent. You will immediately see in on the chat.



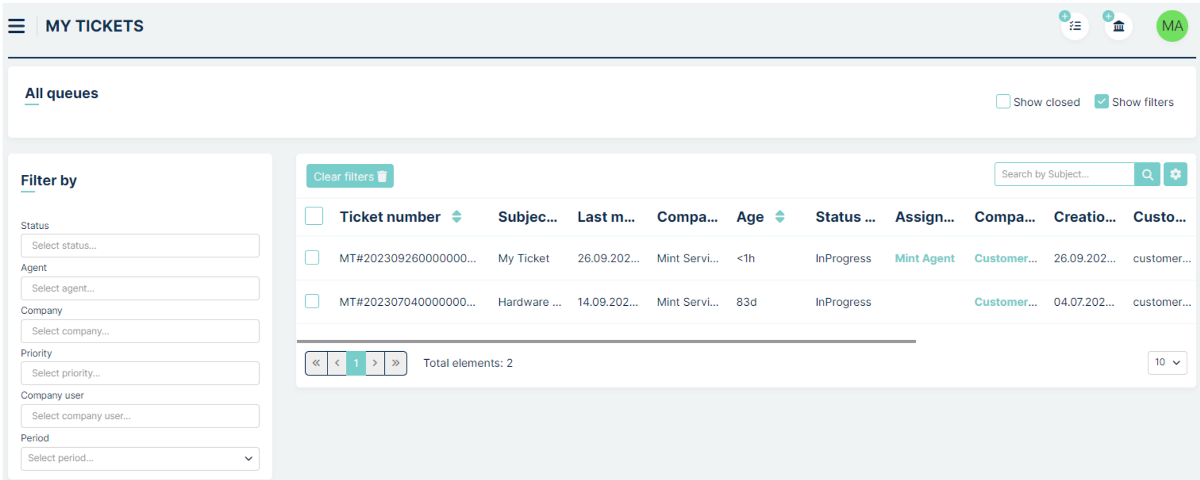
Each article you can easily export to pdf file using ( ) button located next to every article.

Basically, the whole 'Ticket Details' section is where you will see all of the interactions between customers and agents happening in order to solve the ticket.

4.3.5 MY TICKETS

This function can be enabled or disabled in admin profile in Settings => General => Tickets

The "My Tickets" feature is an additional dashboard with a list of tickets that we are the authors of (that we have created - both as tickets and as email requests) and applies to both the agent and the customer.



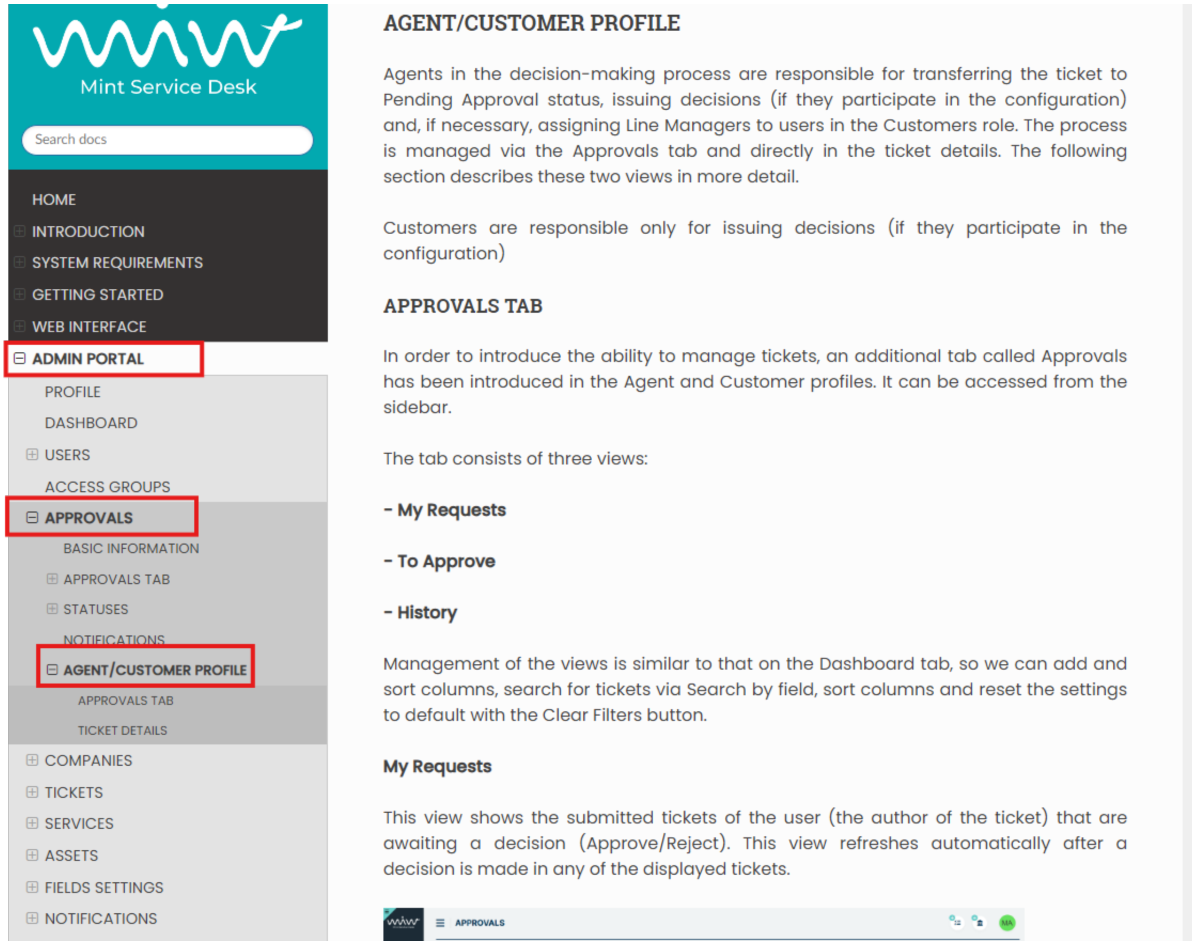
This functionality allows us to follow the life cycle of a ticket even if we do not have access to it due to permissions. This allows the user to view basic information such as the queue, type of submission, assigned person. Entering the details of the requests depends on the agent's permissions to the queue and the request type.

The "My Tickets" view consists of a panel containing tables with requests, a side panel containing basic filters, and a top panel containing "Show Closed" and "Show Filters" checkboxes. The table has basic columns with information such as status, queue, agent, for example.

Navigating "My Tickets" is the same as the dashboard and is described in the "Dashboard" section

4.3.6 APPROVALS

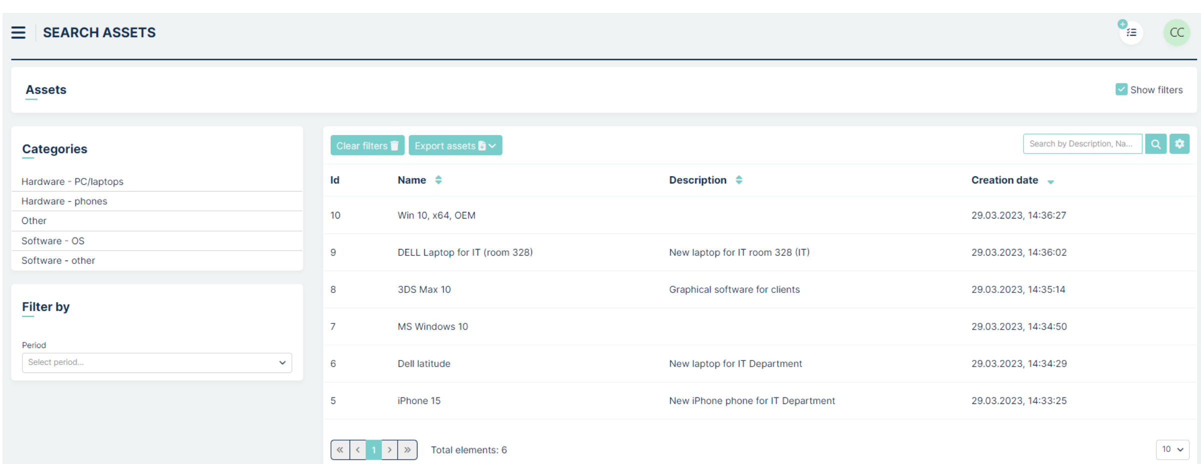
To see the description of the Approvals tab, please visit Admin portal -> Appvovals -> Agent/Customer profile



4.3.7 ASSETS

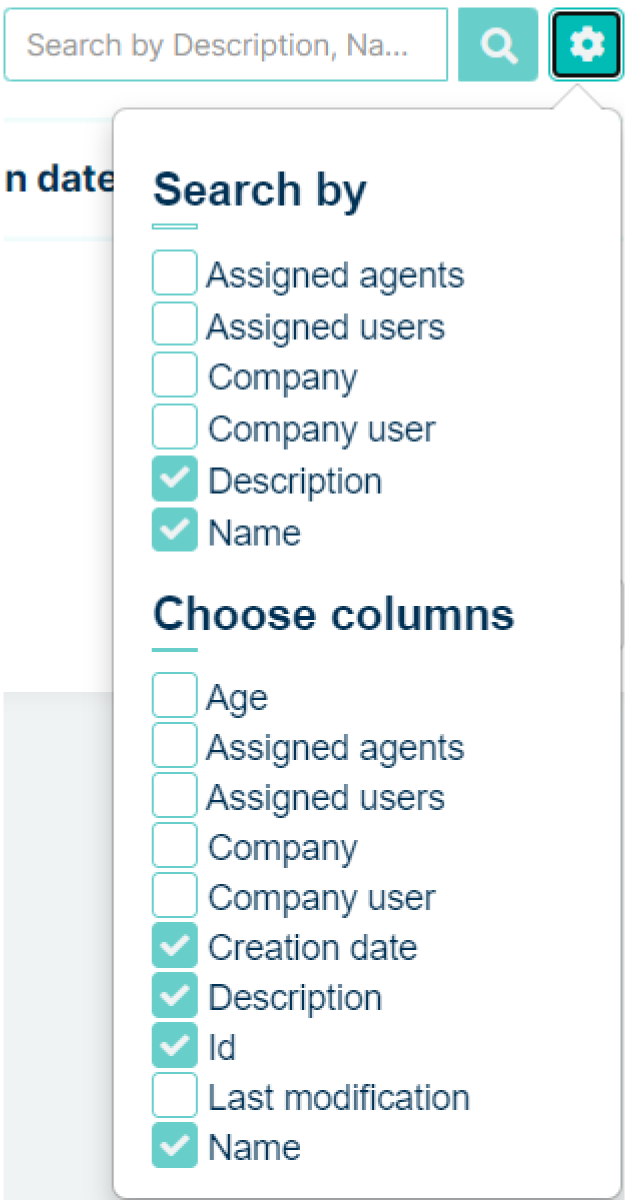
As a client, you will also see the "Assets" section, where you will find the assets available from the company or provider. This means that the **MINT Service Desk** administrator added some assets that are not assigned to you, but they are available or connected because maybe you can relate your requests with them or you can ask for new services knowing that the asset is available in the company.

As an example, it is very helpful for software assets because you will know if your company already has a particular software or license you may need, and you don't need to pay twice.



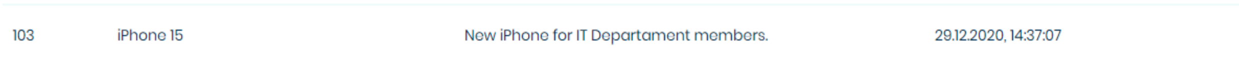
Right here you can filter those assets by 'Categories' or by 'Period'. If you want to reset active filters, just click on the Clear filters button. You can also remove any selections (Categories, Filters) by click on or button right next to each position.

The attribute columns can be added or removed in the section "Set column properties" on the right side by clicking on the button. Once you do that you will see a small window, where you can select the desired information you want to see on the assets list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.

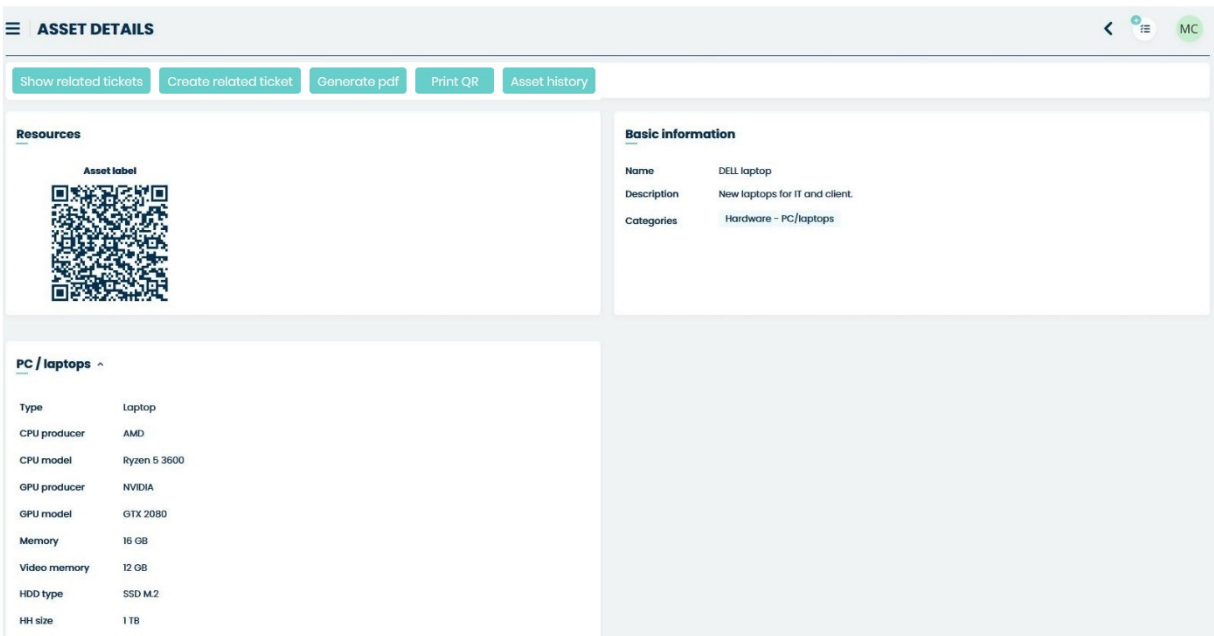


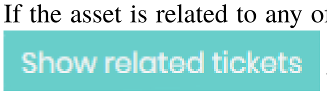
Also, you can look for specific assets by using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.

If you want to see the details of any asset, just click on one of them.

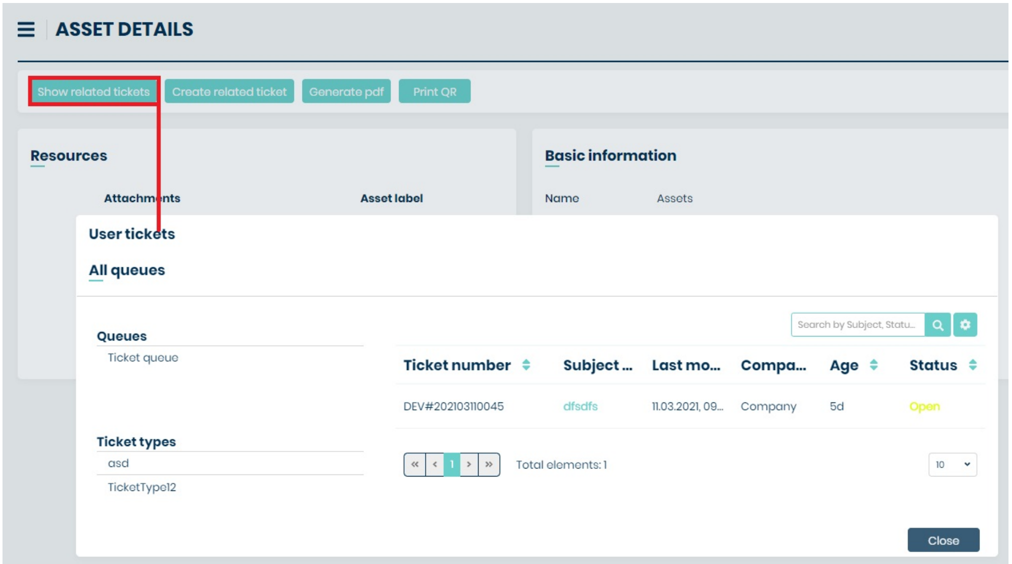


If, on the other hand, you want only to see details of any asset (without changing anything in it) you can click on any asset on the list and you will be moved to the 'Asset details' view.



If the asset is related to any of your Tickets (an Agent is able to do it) you will find it on the list once you click the 

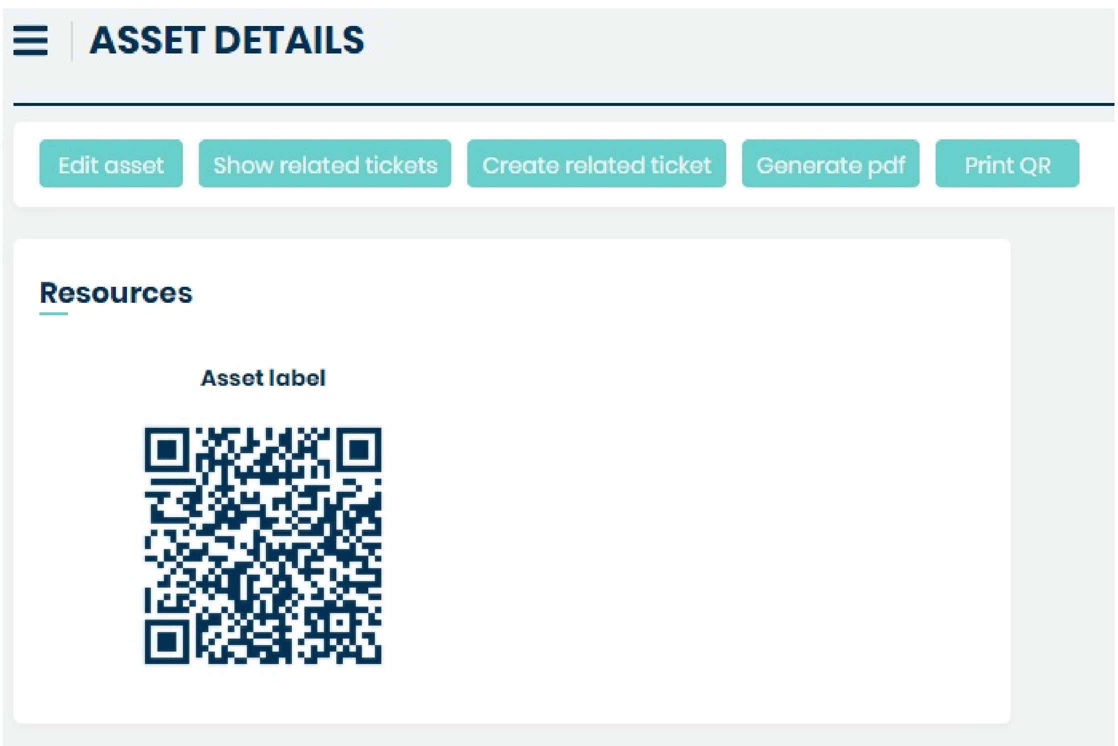
button.



If you want to export asset information into a pdf file simply press 'Generate pdf' button.

If you want to print the QR code on your printer simply press 'Print QR' button.

There is QR code which you can scan and you will be moved to the Asset Details of this particular Asset.

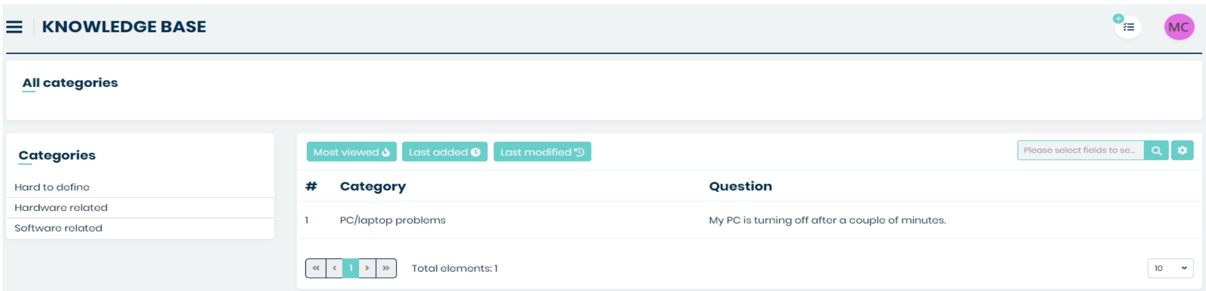


4.3.8 MY ASSETS

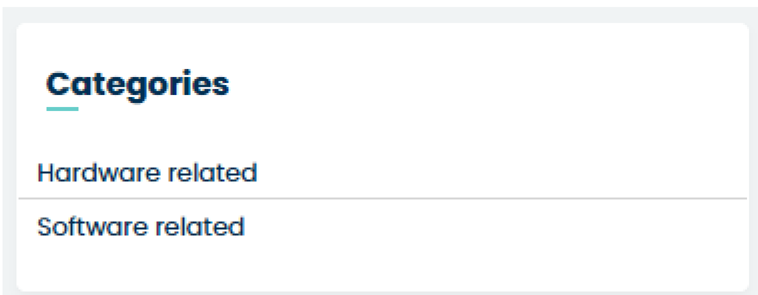
The only difference between this part and 'Assets' is that here you will only see the Assets that are only assigned to you. The rest (asset list, editing, preview, etc.) stays the same as it was for 'Assets'.

4.3.9 KNOWLEDGE BASE

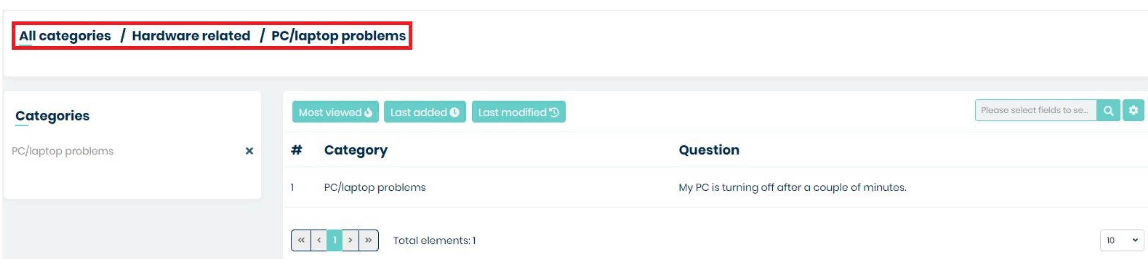
In this section, as a Client you can see the whole list of Knowledge Base topics with questions assigned to them and their answers. You can browse the list of already existing topics and search for the answers that might help you with your problem. Also, as it was described in 'Ticket details' part, you can get some help when you're creating a Ticket, while typing the Ticket's content.



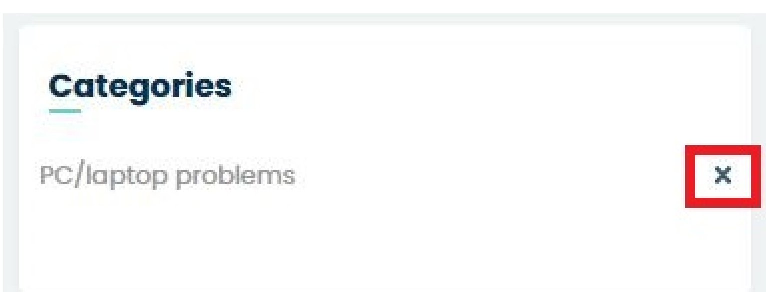
The default view shows the list of all available topics. On the left side, you can see available categories.



You can select one category, or even a sub-category inside to find the topic that fits your need. If you do so you can easily go back to any level above in the category structure by clicking on the category path in the upper side of the view.

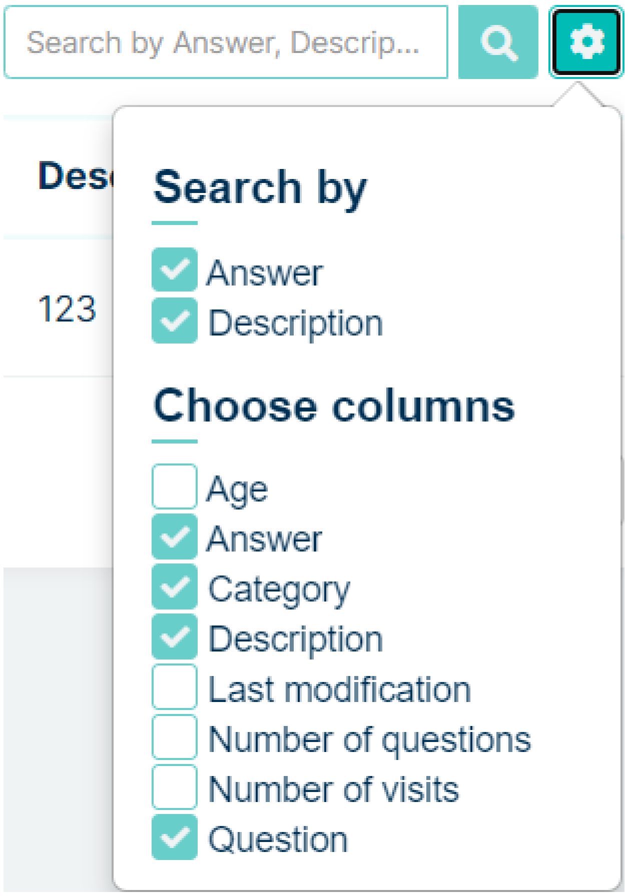


You can also click on the 'X' button located on the right side of the currently selected category/sub-category.

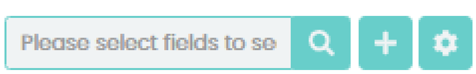


By default, in the main view of the Knowledge Base section, you will see the list topics with the following attribute columns: Category, Question, Action. In order to see more information, you need to click the  button.

Once you do that you will see a small window, where you can select the desired information you want to see on the Knowledge Base list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.

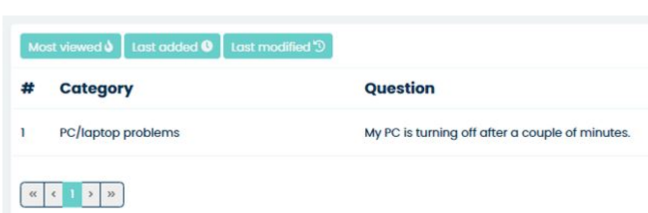


Also, you can look for a specific topic by using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.



In the upper part, above the topics list, you will see a couple of buttons:

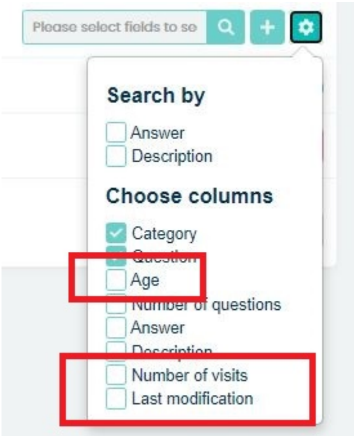
- 'Most viewed'
- 'Last added'
- 'Last modified'



They are used for sorting the list by:

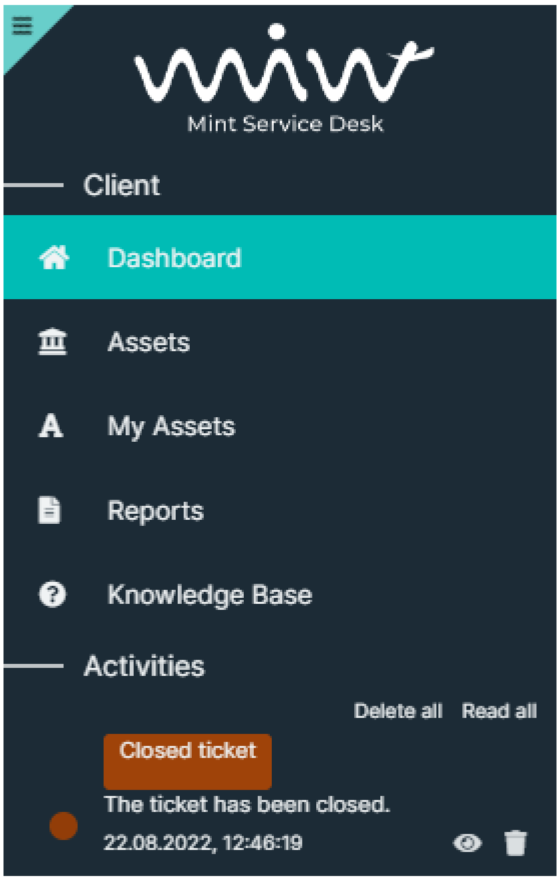
- **Most viewed -** from most viewed to the least viewed (column 'Number of visits')
- **Last added –** from most recently added topic to the oldest one (column 'Age')
- **Last modified –** from the most recently modified = most up to date (column 'Last modification')

Remember that in order to see any changes on the list while selecting the options above you need to have the right abovementioned attribute columns selected.



4.3.10 ACTIVITIES

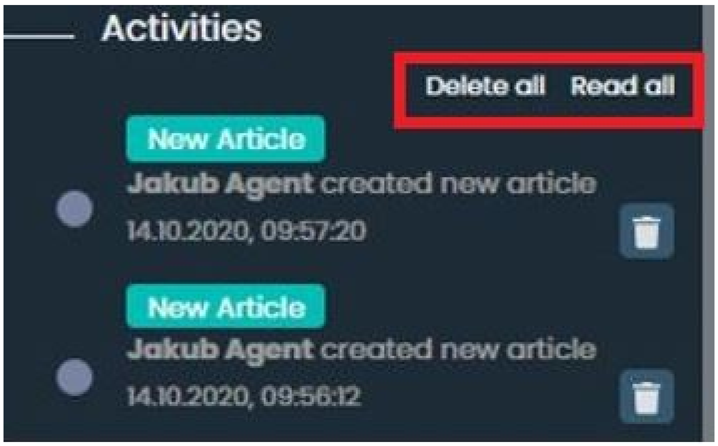
On the left side, in the lower part of the menu, you will find the Activities section.



It will display the tickets with any new activity, so you could easily see what is new and go directly to the action. You will see a blinking position on the list each time a new change, like a new message (Article) from the Agent, has been made. The notifications are customizable (color, title, content, etc.), but only an Admin user is allowed to do that.

You can delete any position from the Activities list, by clicking the  button.

If you have more than one activity on the list you can either 'Delete all' of them (they will disappear) or mark all of them as already read ('Read all').



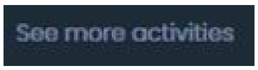
Also if you have a couple of unchecked notifications within one ticket, for example, a couple of unread messages from the Agent, you will notice a number presented on the right side inside the notification.

Now you can click on the notification and be moved to the Ticket Details screen where you can check the messages you missed.

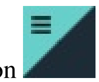
You can also click on the  "Read' icon to mark the notification as already Read (it will be grayed out) or even click on the  'Read all' icon to mark all of the notifications (described with a number) as already read.

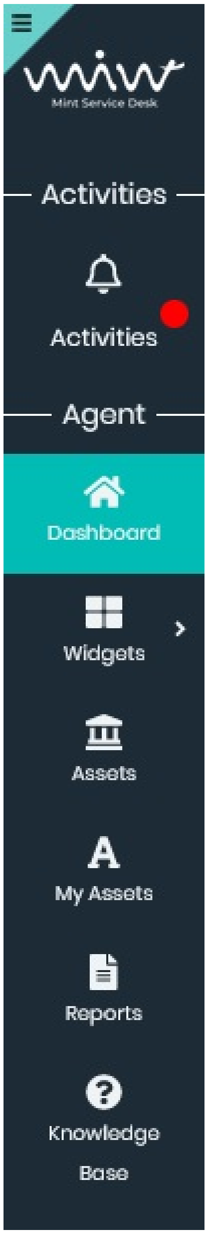
Once you use those options the notifications would now look like in the following screen.

If you have plenty of positions available on the Activities list, you will see only part of them. To see more click on the button 'See more activities' and more of them will be loaded.

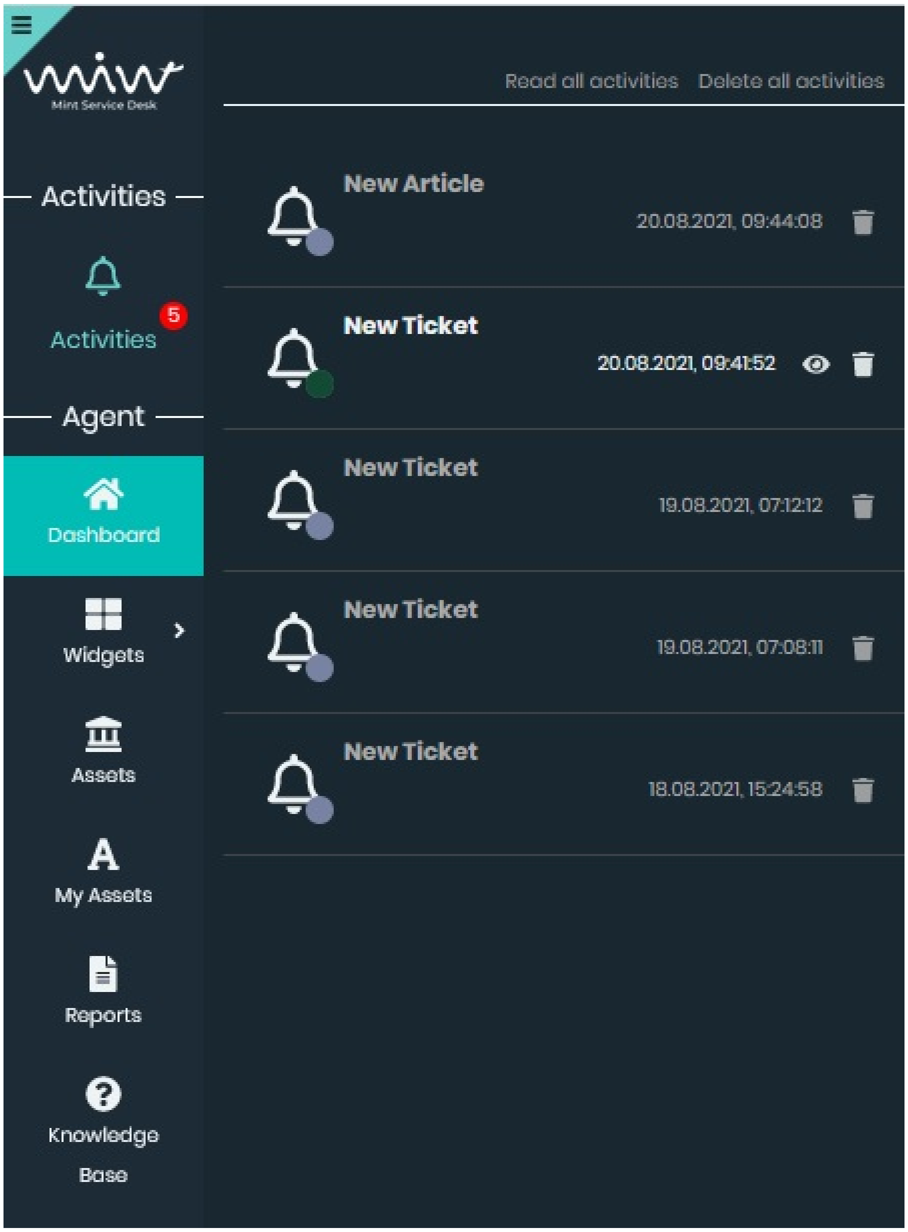


Each time you click on the notification in the 'Activities' section you will be moved to the Ticket Details screen where you can continue communicating with an Agent.

If you want to change the look of the sidebar to a new one, just press the button  in the upper left corner.



When the activity button is pressed, the activity box will slide out.



To hide the activity sections, press the Activities button again.

Last, but now least, if you ever see the following message, while trying to access any Ticket or Asset, it means that the Admin user has changed your access rights and you need to contact him and ask for help.

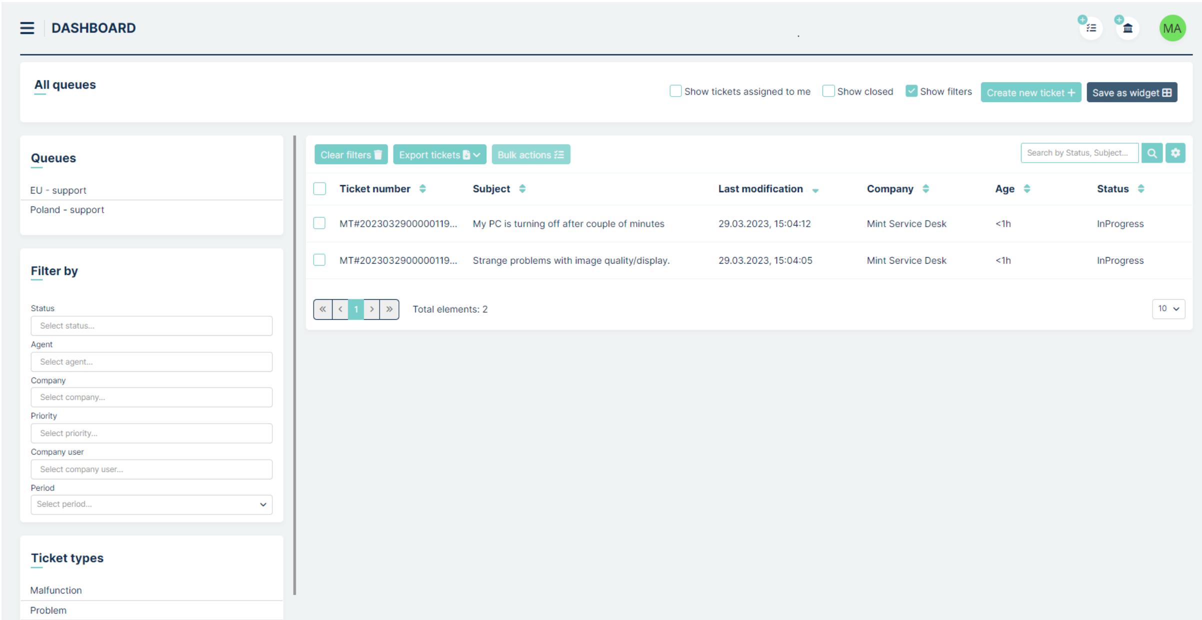
Your access rights has been changed. You are not authorized to view this page.

4.4 AGENT PORTAL

Once you login to your Agent account you will see a Dashboard view.

4.4.1 DASHBOARD

Dashboard will display the tickets that you are able to see based on the agent rights.

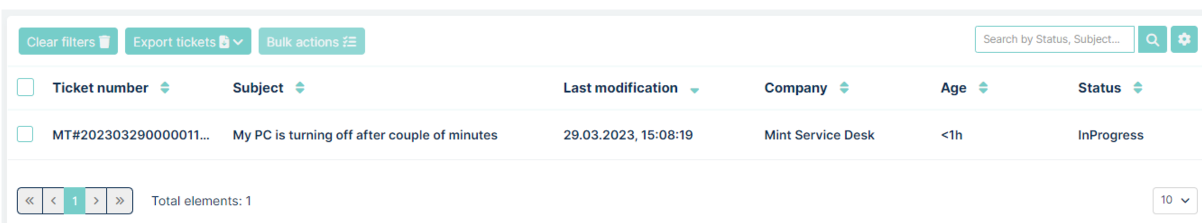


You can sort them by different attributes (by clicking on the column name - you will notice that each time you do that a small icon next to column's name will change ▲/▼/⬍)

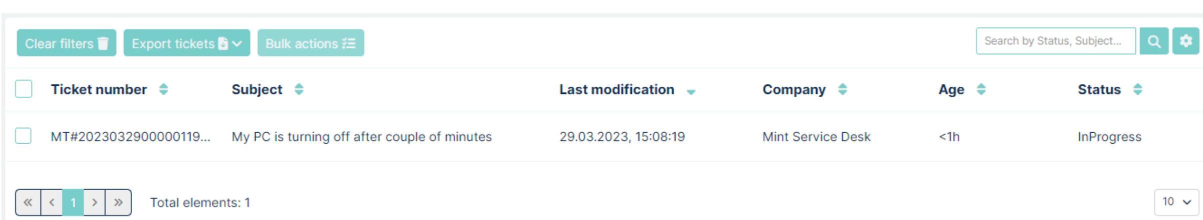
On the left side of the Dashboard you can filter your tickets by "Queue", "Ticket Type" or you can use the "Filter by" option that helps you to filter them by "Status", "Agent", "Company" and "Period".

The ticket which is new will be Bold until you click on it and go to its details.

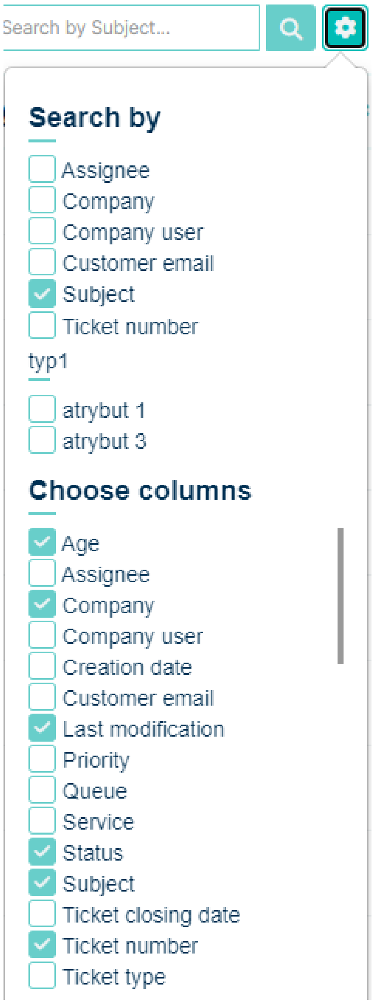
New ticket:



The ticket you already opened:



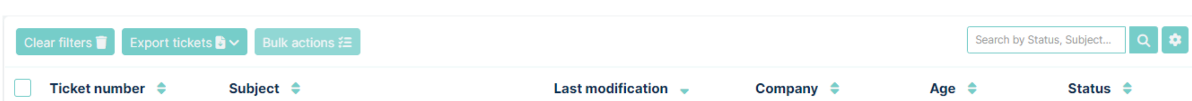
The attribute columns can be added or removed in the section "Set column properties" on the right side by clicking on the ⚙ button. Once you do that you will see a small window, where you can select the desired information you want to see on the tickets list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.

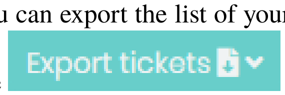


Also, you can look for specific tickets using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.

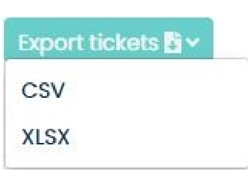
In the upper part, above the tickets list, you will see a 

button, which will allow you to reset the view and remove all of the active filters.



If you want, you can export the list of your tickets and save it in one of two file formats: .CVS or .XLSX. To do that, just click on the 

button and select one of the 2 available file formats.



Now, in your Operational System's file explorer click 'Save' to save the file on your hard drive.

Once you open the file it will contain tickets information such as: 'Ticket number', 'Id', Subject', Creation date', 'Last modification', 'Company', 'Status', Customer', 'Queue', and 'Assignee'.

If you like to see or hide tickets that have already been solved and closed, you can always mark/unmark the option 

located on the right side of the Dashboard screen.

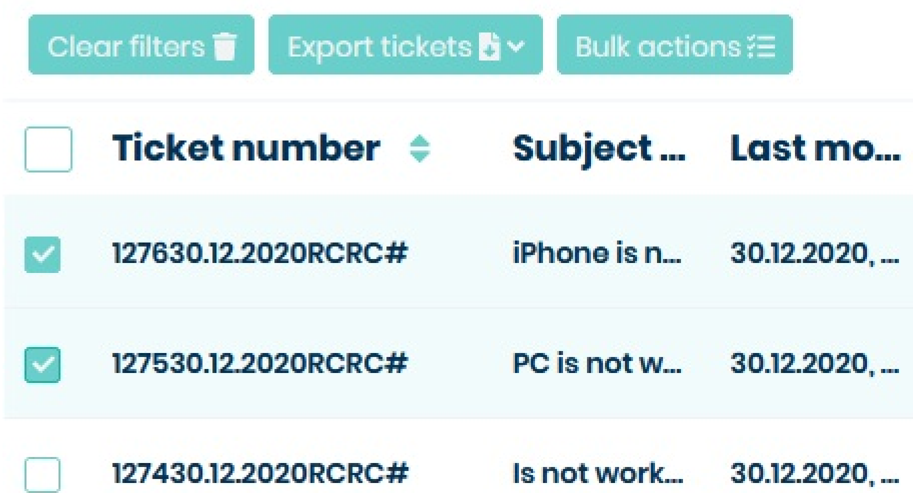
When you have plenty of Tickets on the list, you will have to use some additional navigation options, located below the list of Tickets, for moving between pages or for changing the number of Tickets that can be displayed on one page.

On the left side, you have the navigation buttons, while on the right side you can change the number of Tickets per page. Those options are available in many places in the Mint Service Desk.

One more important thing is that you can click on any position of the listed tickets on your dashboard and that will take you to the "Ticket Details" of the selected ticket.

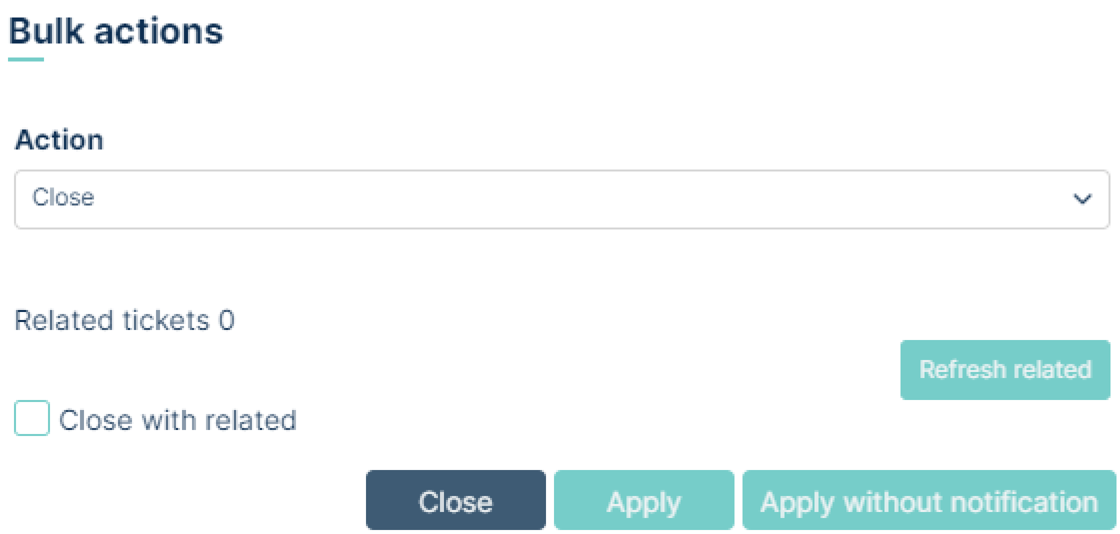
To close several tickets, use the 

button. As you can see, this button is blocked by default. To activate it, simply select some tickets by clicking on the checkbox next to them.



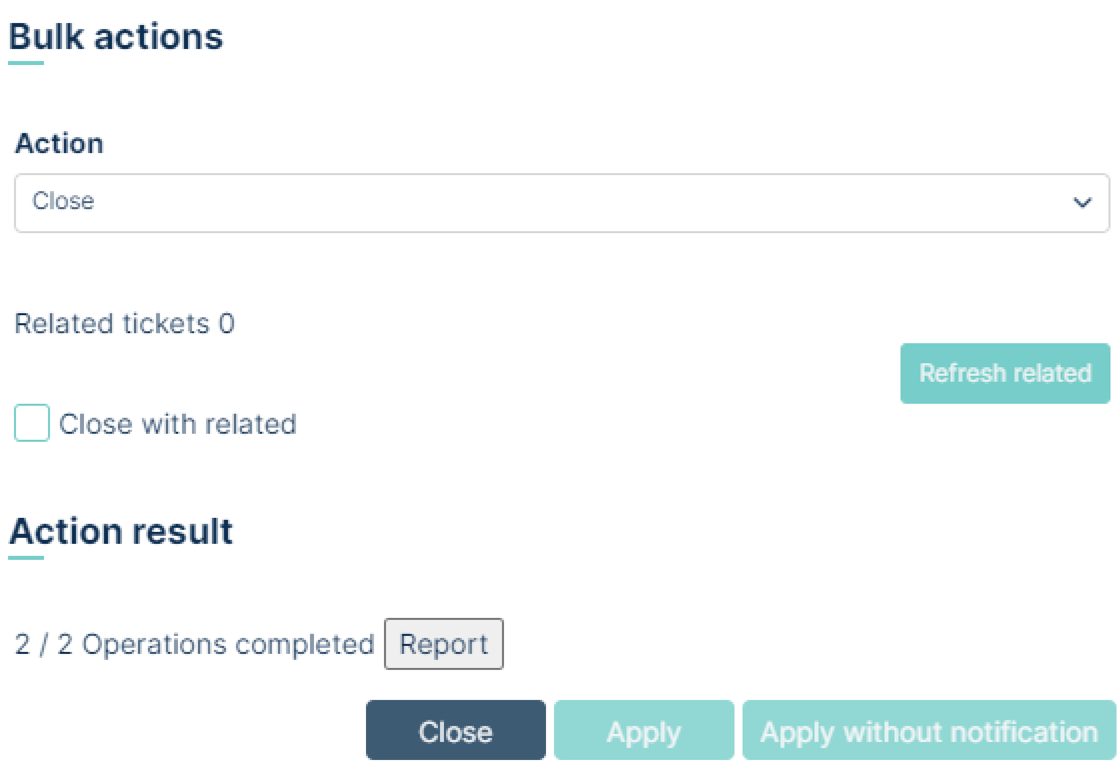
Now use the 

button. A modal will show up. From the list select the "Close" option and confirm the operation with the "Apply" or "Apply without notification" button. If you want to close related ticket, select "close with related" checkbox.



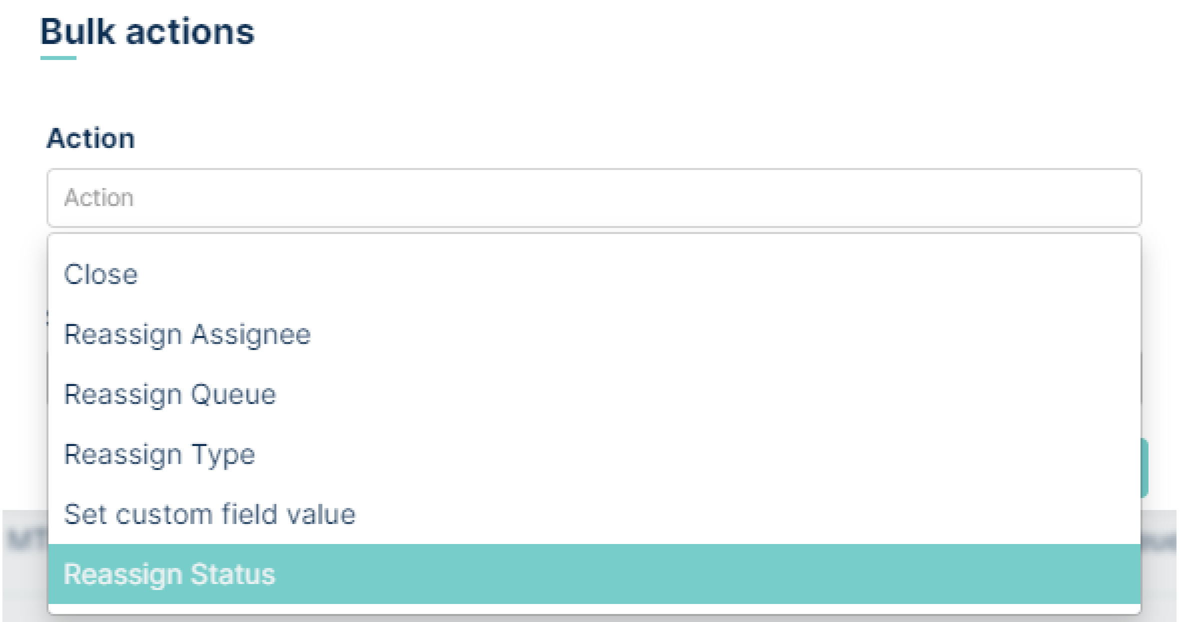
- **Apply -** Close multiple tickets with notifications in "Activities" section
- **Apply without notification –** Close multiple tickets without notifications in "Activities" section

When you click one of these buttons, the modal will be updated.



To download the report of closed tickets, click on the Report button.

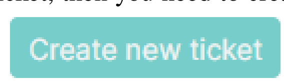
Click outside the modal to complete the multiple ticket closing process.



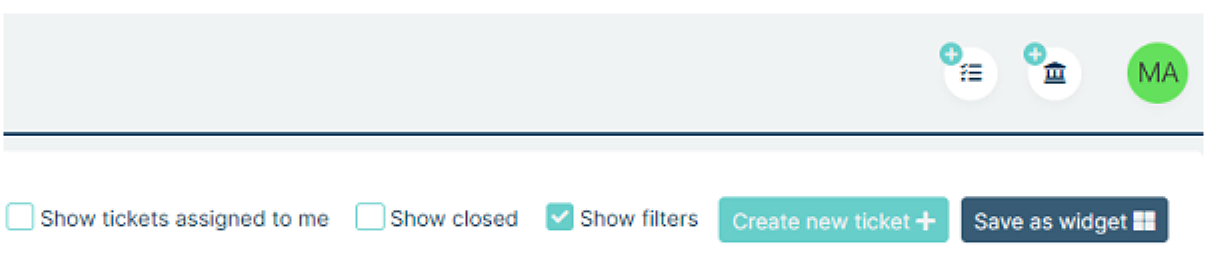
There are currently six bulk actions in the system:

- **Close** Allows you to close multiple tickets.
- **Reassign Assignee** Allows you to reassign multiple tickets.
- **Reassign Queue** Allows you to change the queue assignment of multiple tickets.
- **Reassign Type** Allows you to change the type assignment of multiple tickets.
- **Set custom field value** Allows you bulk filling of custom fields within the same ticket type in multiple tickets
- **Reassign status** Allows you to chane the status of multiple tickets

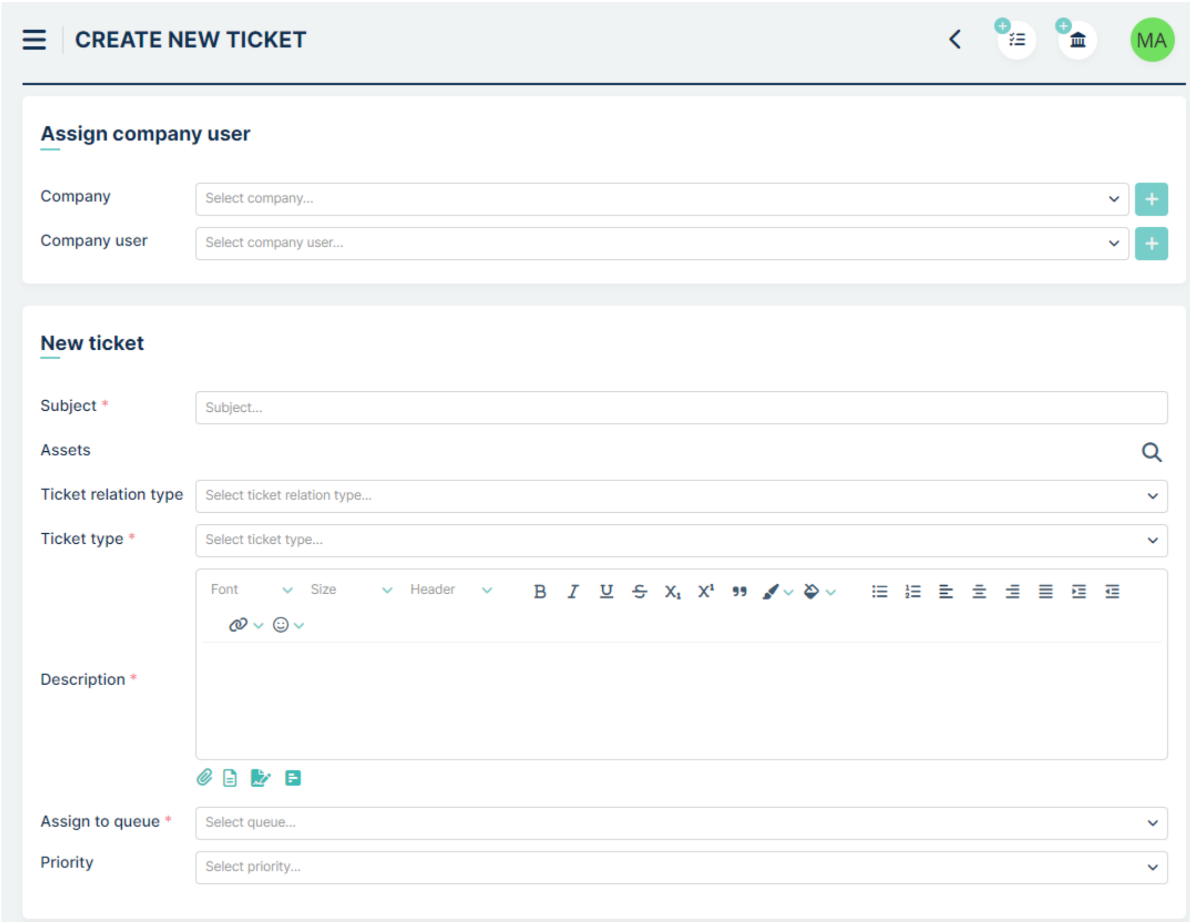
4.4.2 NEW TICKET

If you receive a phone call from a customer or if you want to create an internal ticket, then you need to create a new ticket. In all cases, all you need to do is to click on one of two buttons: :  or 

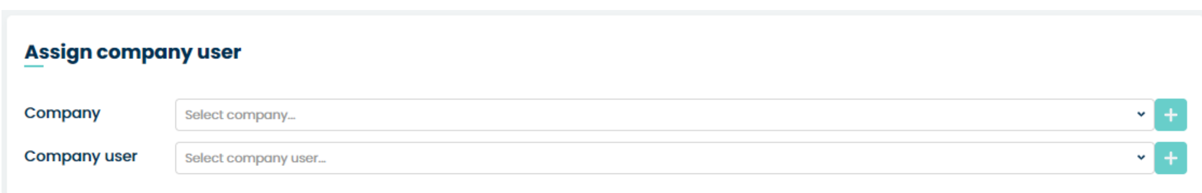
, located on the top right side of the Agent Portal.



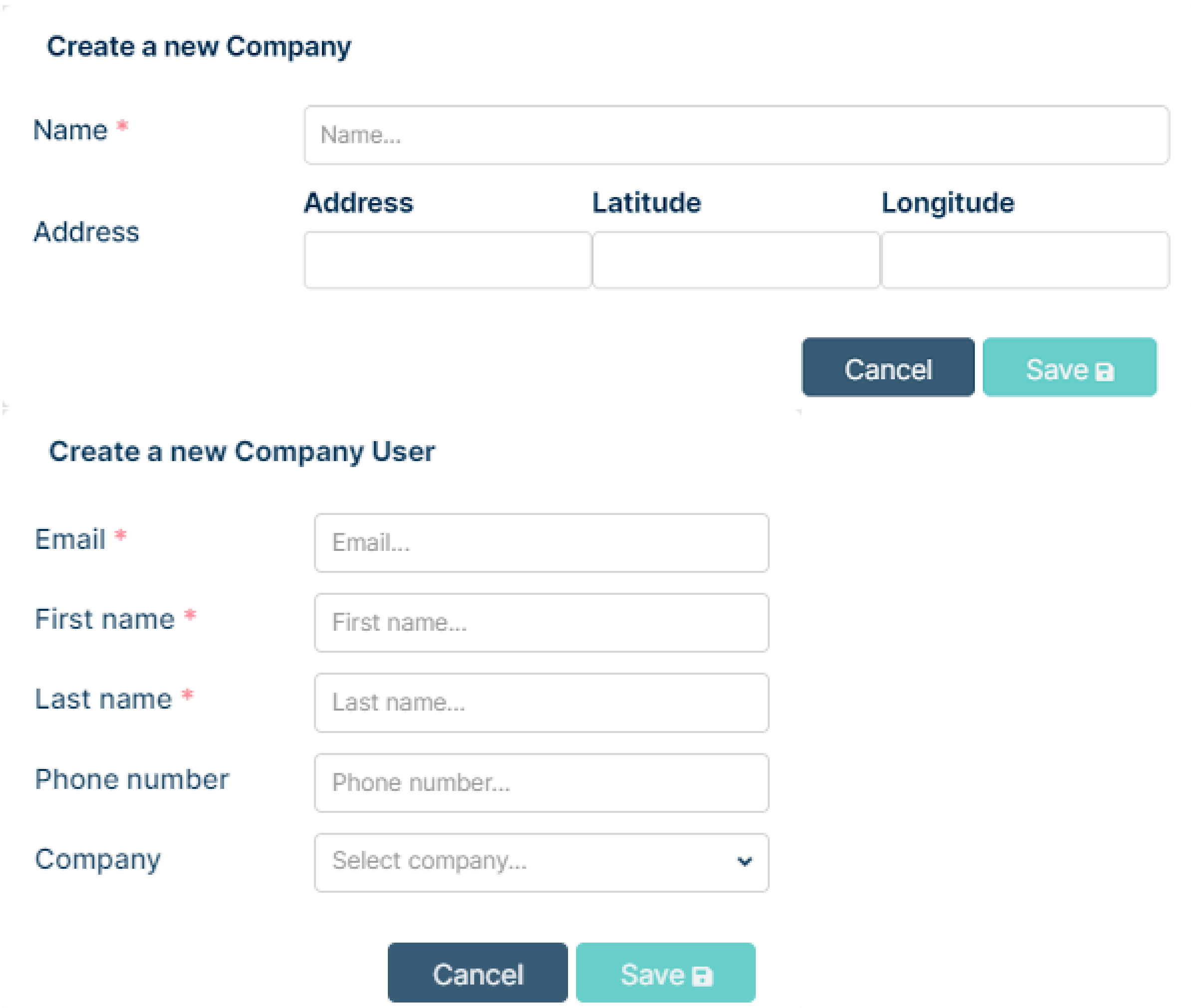
A new 'Create new ticket' screen will be displayed.



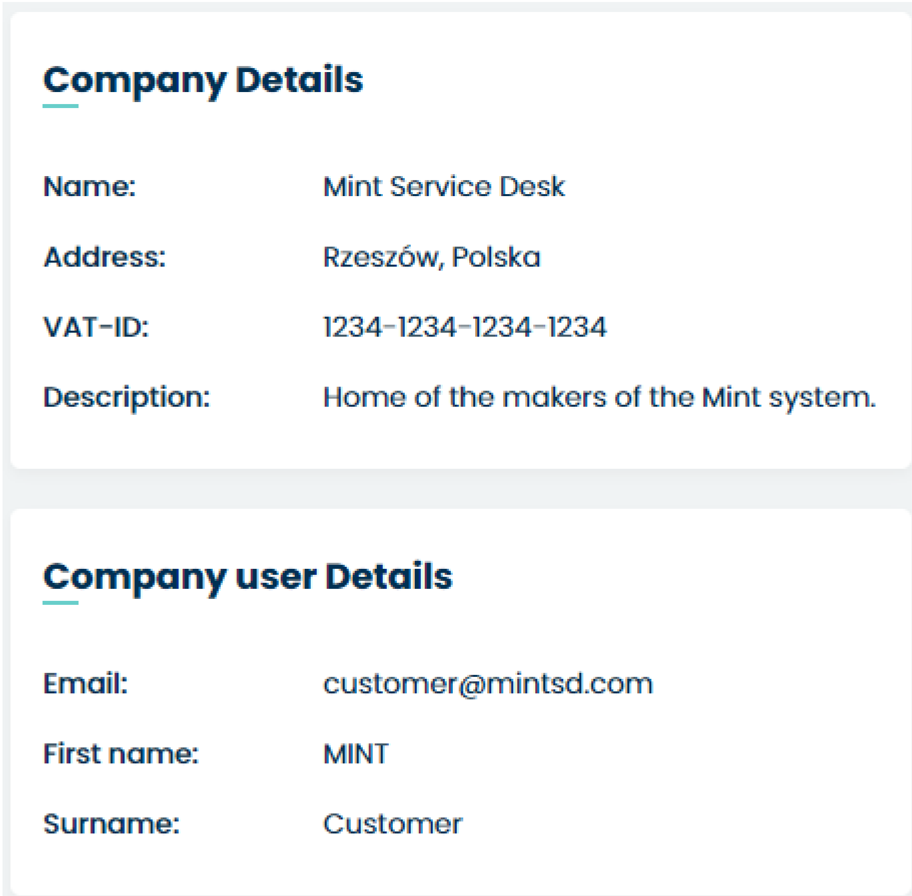
When you receive, for example, information that some of your Customers have a problem/need help but did not or (by any means) cannot create a Ticket, as an Agent you can, while creating a ticket, assign 'Company' and a 'Company user' to the ticket.



In this place, you can can also quickly add a totally new Company and Company user by clicking on the  button. Depending on the choice you will see one of two following windows.

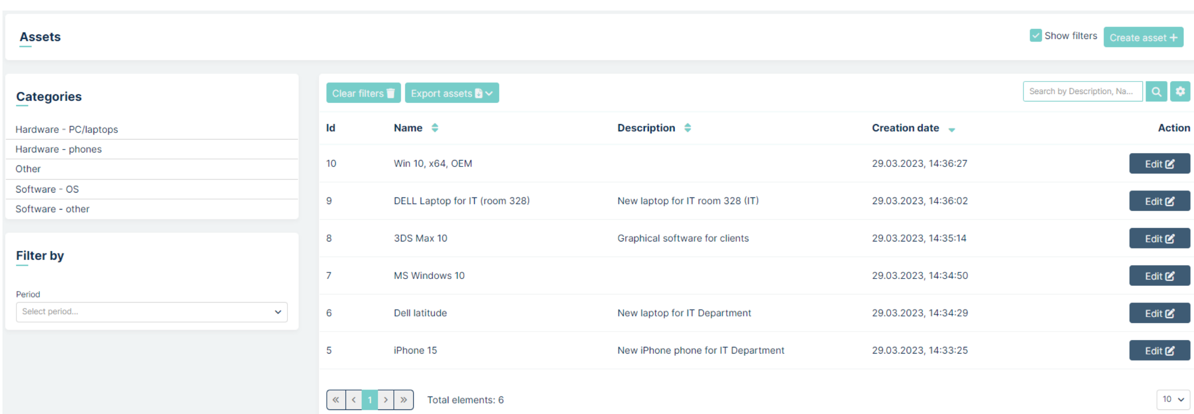


Once you select a Company/Company user or add totally new one additional information will appear on the right side.



Now, you need to add some required (marked with a *) information such as "Subject" (a very short description of the incident, request, etc.), "Description" (detailed information about the problem, your need, etc.) and also choose a right 'Ticket type' and assign the ticket to a right queue by selecting one on the 'Assign to queue' list.

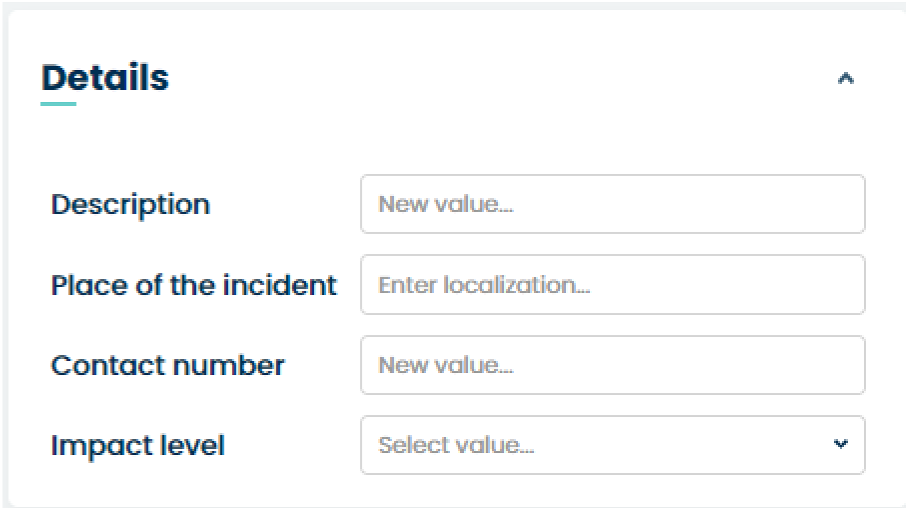
You can also add the asset (from those which are available for you) if Client's problem/inquiry etc. is related to any specific device/asset.



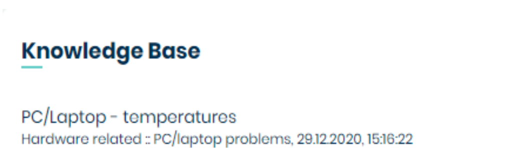
Apart from the above you can also choose a 'Service' (along with SLA/parameters/priorities which are specified individually for each service).

If you want you can add some attachments (pictures, screenshots, etc.) and even select a 'Priority' of this ticket.

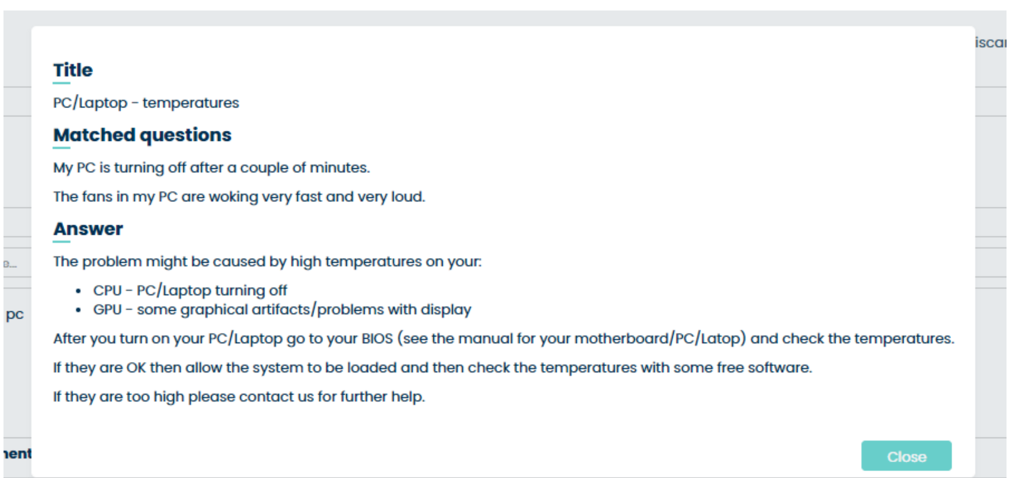
If you choose a 'Ticket type' which includes some additional attributes, you will see, that on the right side of a screen a new block has appeared (located below the 'Company Details' and 'Company user Details' parts), containing some fields and other options, where you can add even more information to his ticket. The information you might see here depends on the Administrator user. He is the only person that can create and manage those attributes.



Like it was previously described in the Customer part, when you're typing the description in the 'Description' field, MINT Service Desk will search the Knowledge Base database for the topics which might include some useful information or even a solution to the problem. If the system finds the right topic (by analyzing the words you used in 'Description') it will display it on the right side.



To see the details just click on the topic and a new window will appear.

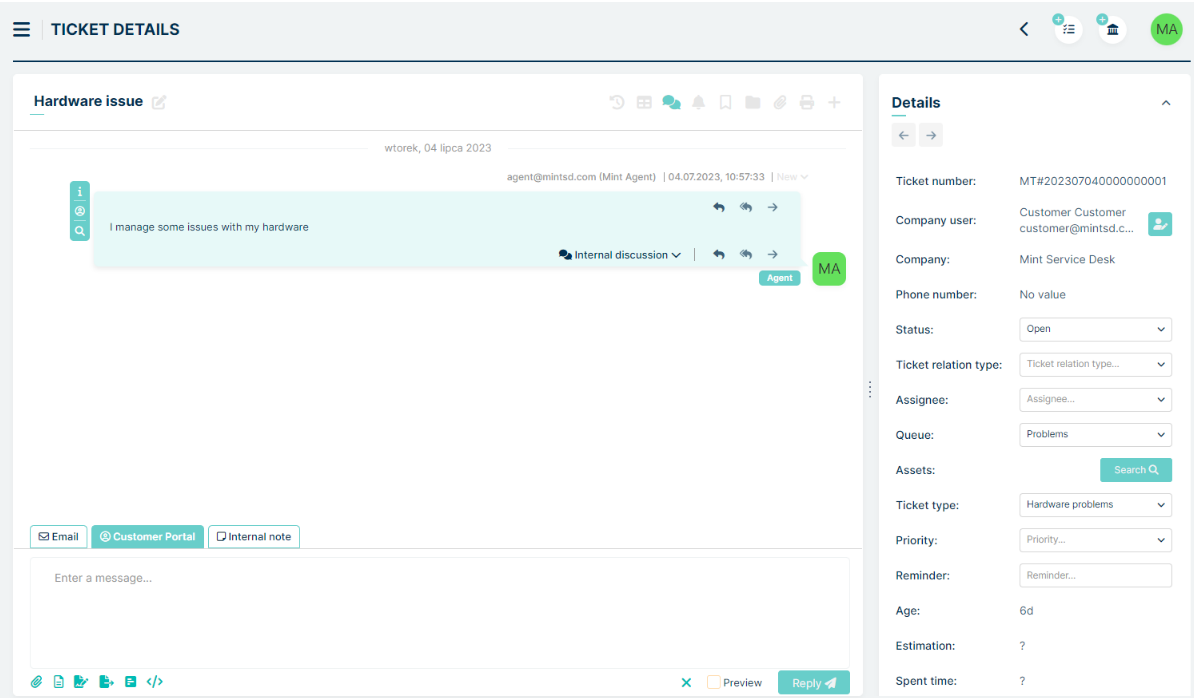


Now, once you completed filling up the information, you need to click on the 

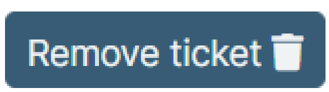
button (right bottom corner) to create this new ticket. Once you do that you will be automatically moved to the 'Ticket Details' section.

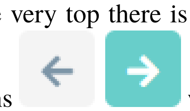
4.4.3 TICKET DETAILS

As mentioned before, from the 'Dashboard' view, as an Agent you can click on any of the tickets on the list in order to move to the 'Ticket Details' part of the system. It's also a place where you will be moved once you create a new ticket.



Right here, all of the Ticket Details will be presented on the right side. Those are: "Ticket number", "Company user" (by clicking the  icon you will be able to change/add a Company or Customer), "Company", "Phone number", "Status", "Ticket relation type", "Assignee", "Queue", "Assets", "Ticket type", "Service", "Priority", "Reminder", "Age", "Estimation" and "Spent time".

At the very top there is a 

button, it is used to delete tickets. Next to it there are two buttons  which are used to switch between tickets.

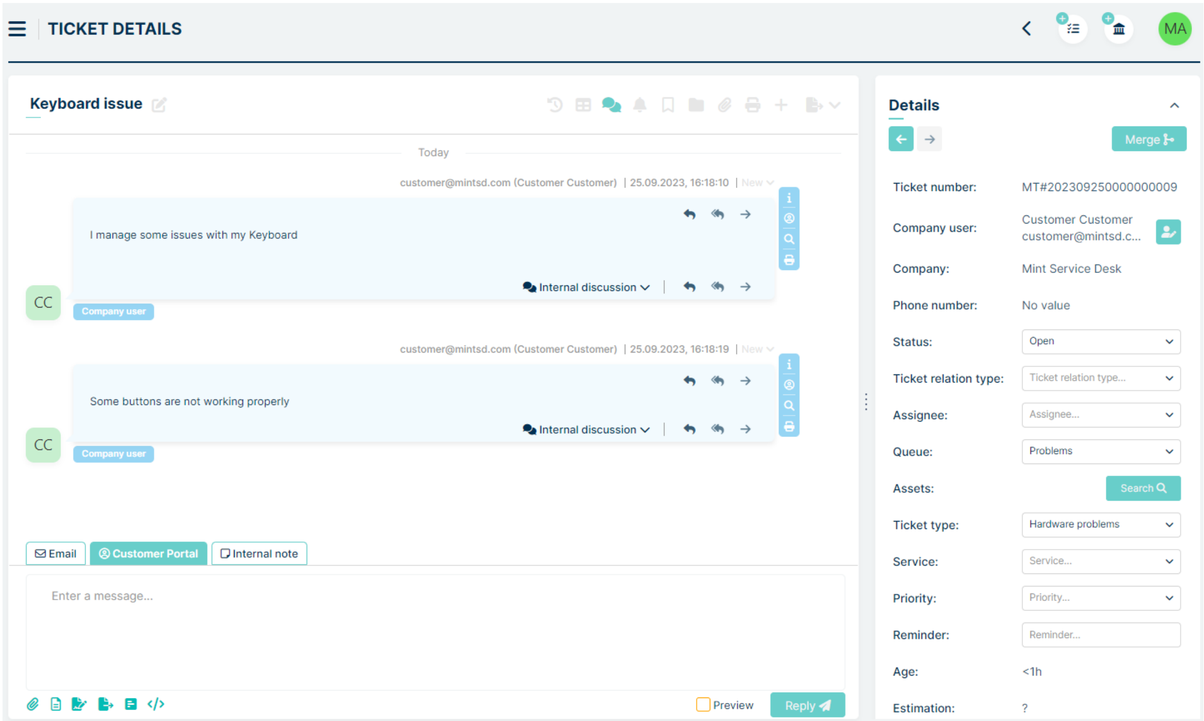
Merge tickets

This function can be enabled or disabled in admin profile in Settings => General => Tickets

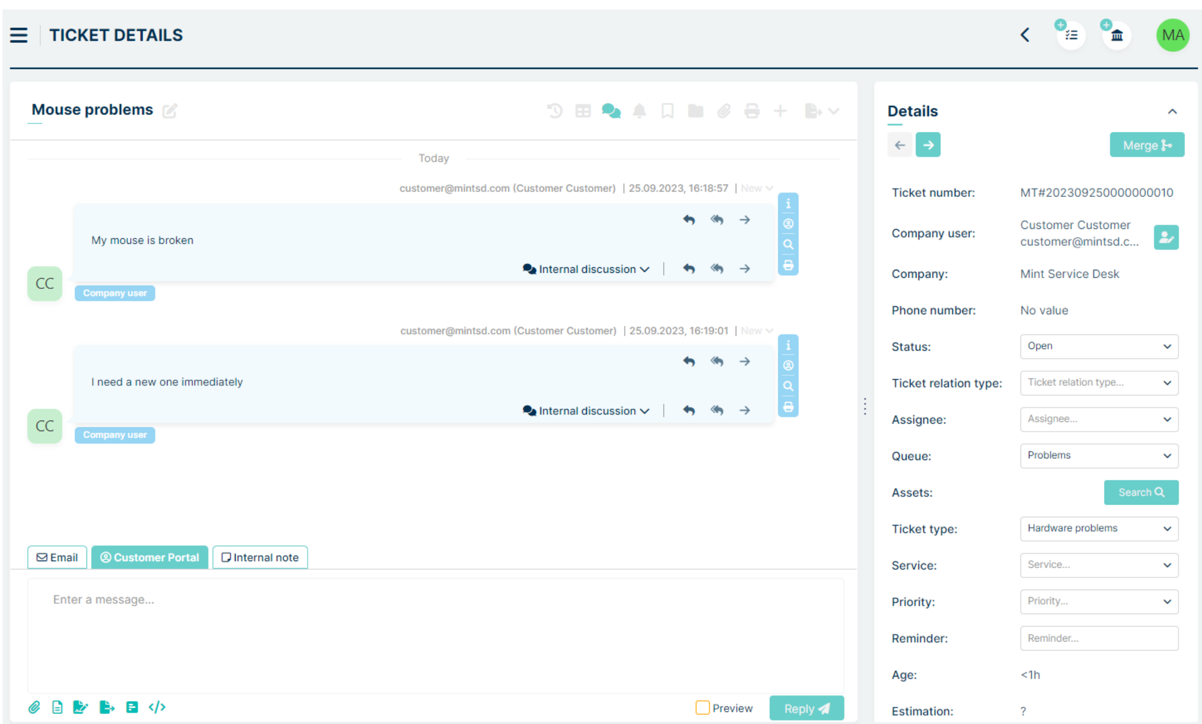
Merge ticket is a function that merges two tickets into one. All articles and files are transferred to the ticket selected by us, while the merged ticket has only its history. Merge ticket can only be made by the agent, the customer can only view its details. It is not possible to merge an already merged ticket.

Let's try to perform the Merge Ticket action in sample case.

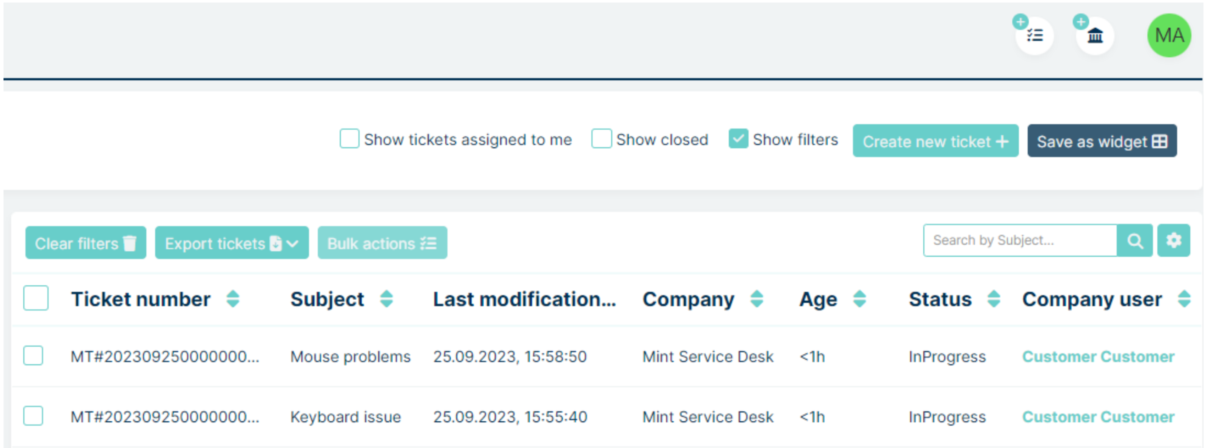
A customer is having problems with his keyboard and has sent in a ticket



Moments later, he sent a similar request regarding mouse problems.



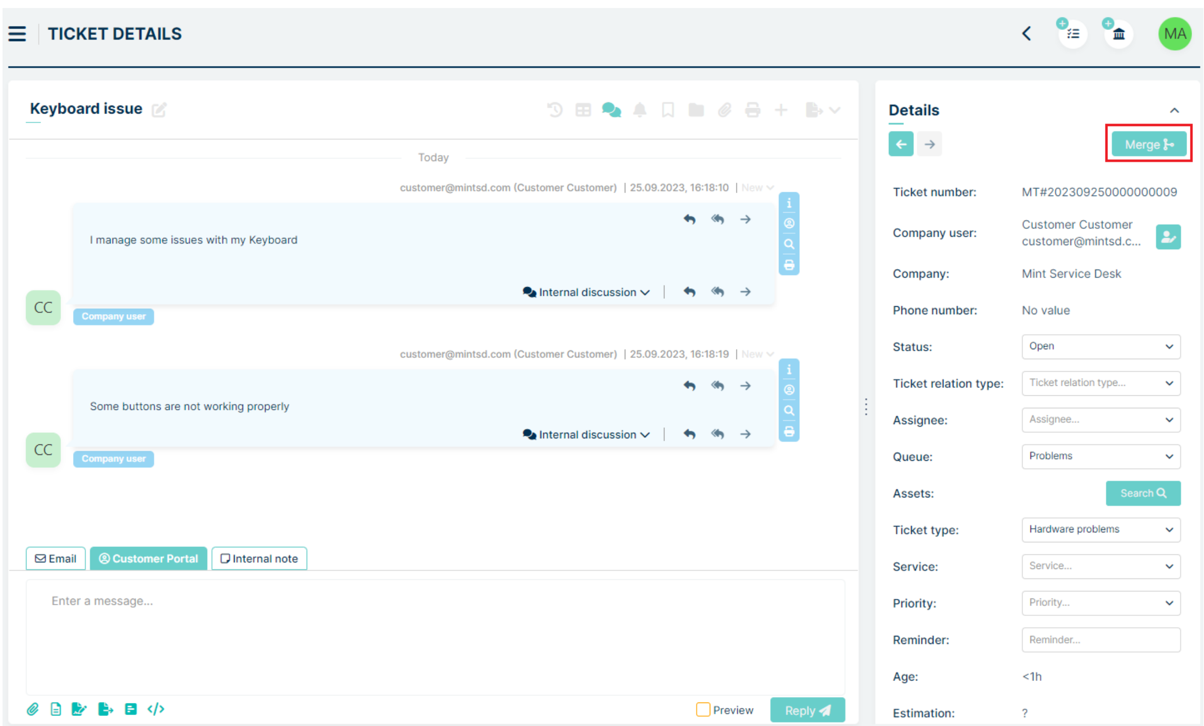
Now, there are two tickets in the system regarding a similar issue.



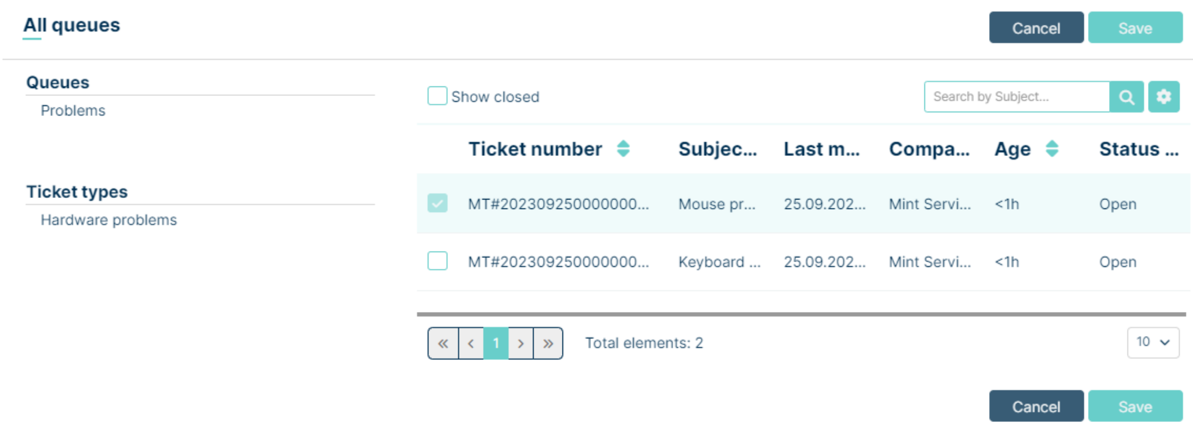
You can merge them to one case.

First we need to enter the ticket that we would like to merge. This ticket will lose all its articles and attachments. The 

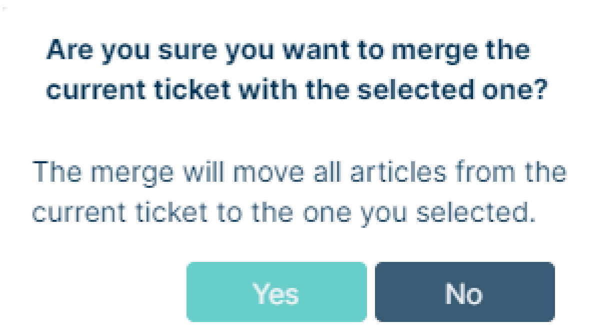
button is visible in upper right in the "Details" section



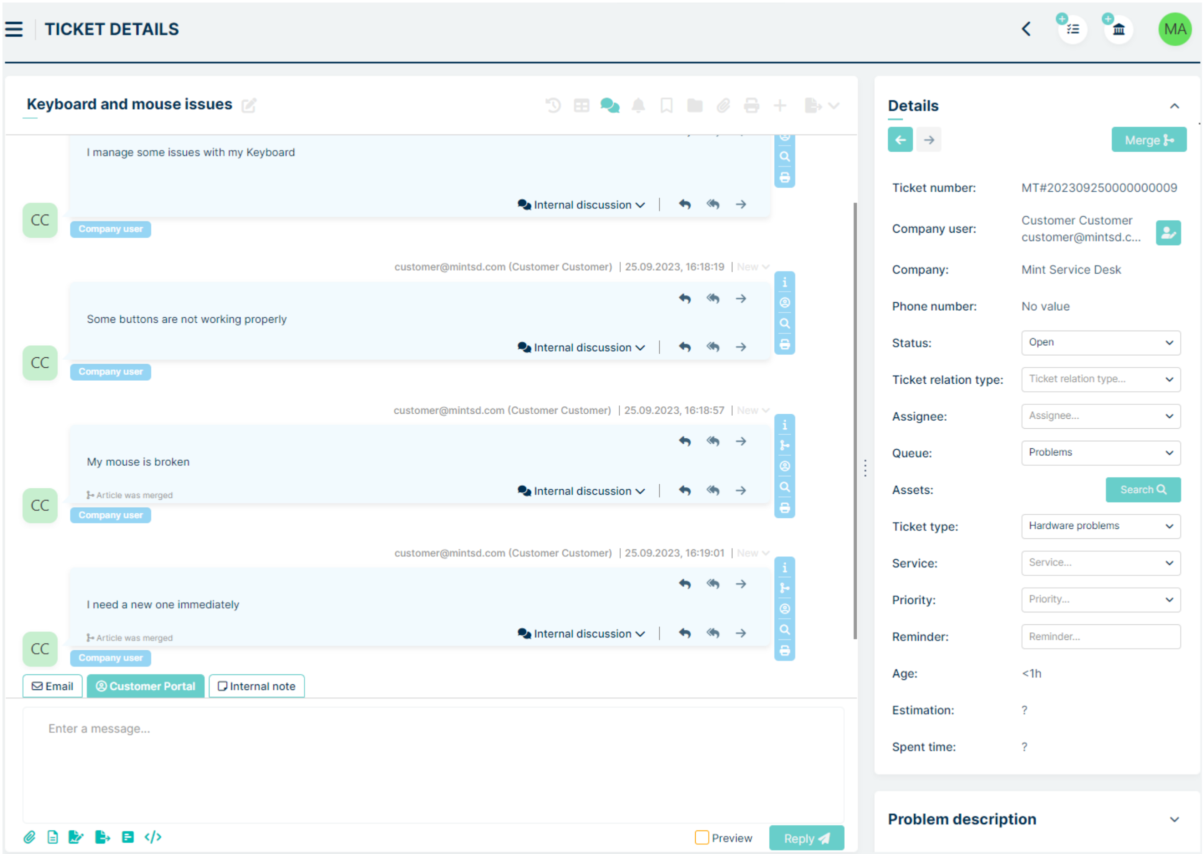
After clicking the Merge button, a modal with Tickets should appear.



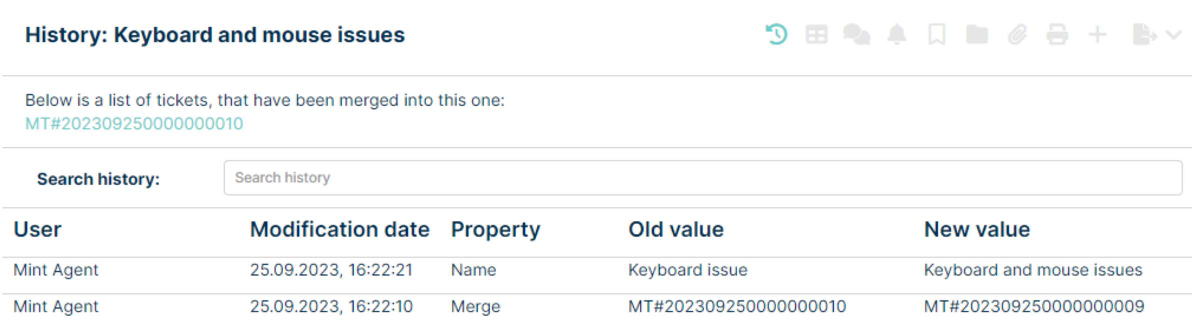
We can filter the queues and ticket type we are interested, as well as adjust the columns and even search through the search field. Next we select the chosen ticket by checking the checkbox. The ticket to be merged must be selected in the modal table. This modal should allow us to select only one ticket to which the data from the merged ticket is to be transferred. After click Save button at bottom of modal, the information appear:



After pressing the "Yes" button, the ticket merging process starts. Choosing "No" rejects the query and takes us back to the modal. After merging, the ticket we choose in the modal opens. all our articles from the merged ticket should be arranged according to the creation date. All the attachments should appear both in the articles and in the Attachments view (the paperclip icon).

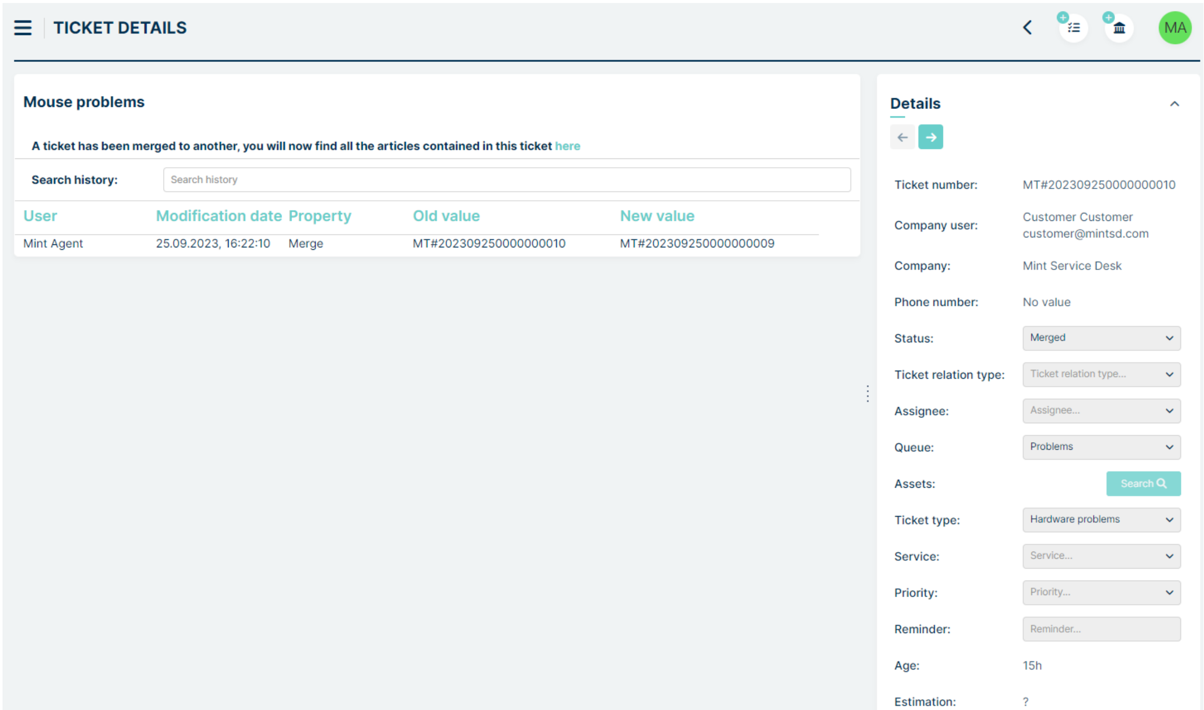


When we enter the ticket history, we have the ticket number that has been merged and an entry in the history about the merge.



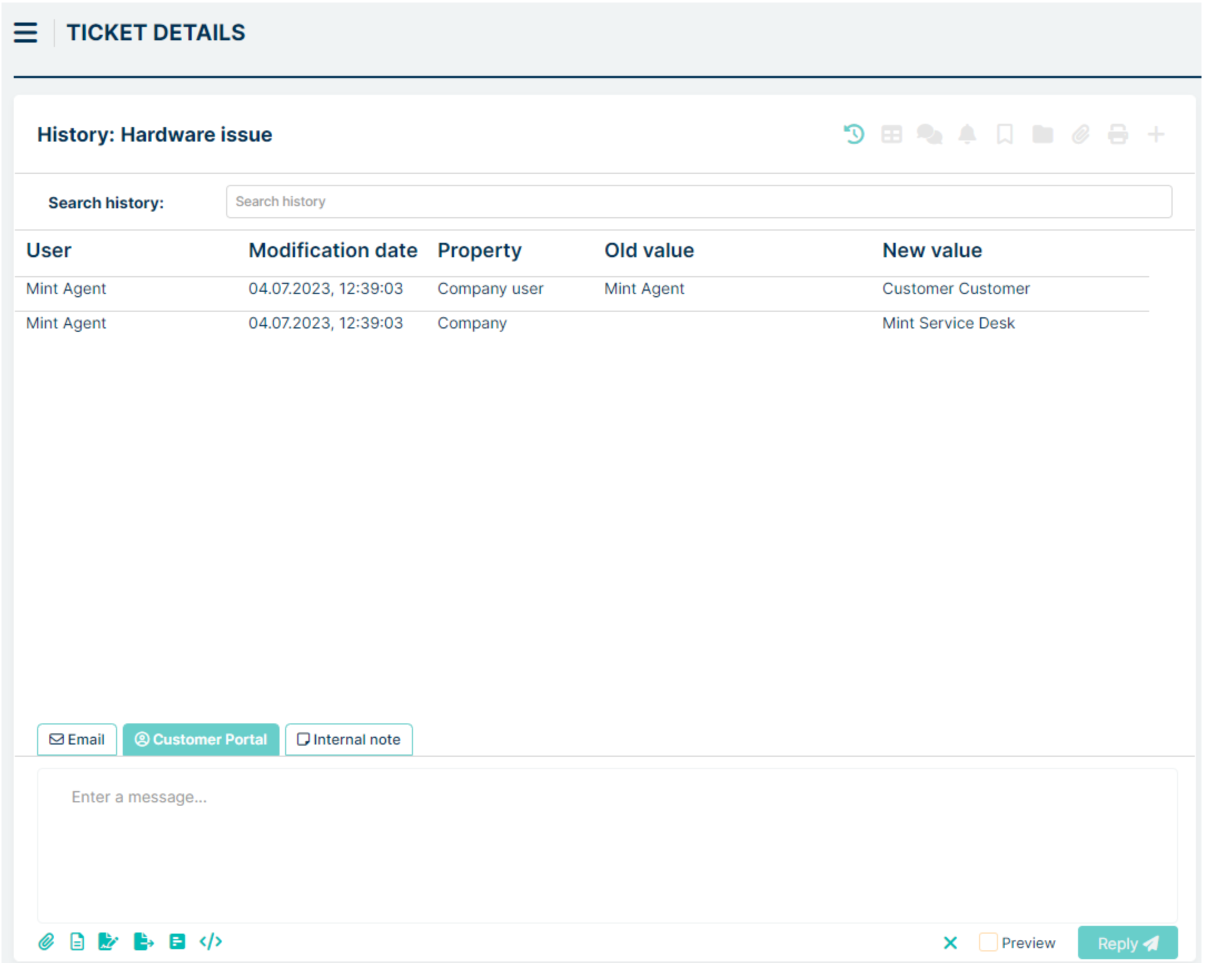
User	Modification date	Property	Old value	New value
Mint Agent	25.09.2023, 16:22:21	Name	Keyboard issue	Keyboard and mouse issues
Mint Agent	25.09.2023, 16:22:10	Merge	MT#202309250000000010	MT#202309250000000009

When we enter a merged ticket, we have blocked all fields with the data like Status, Queue, Ticket type etc. We have access to ticket history, where there is information about where the ticket was merged.

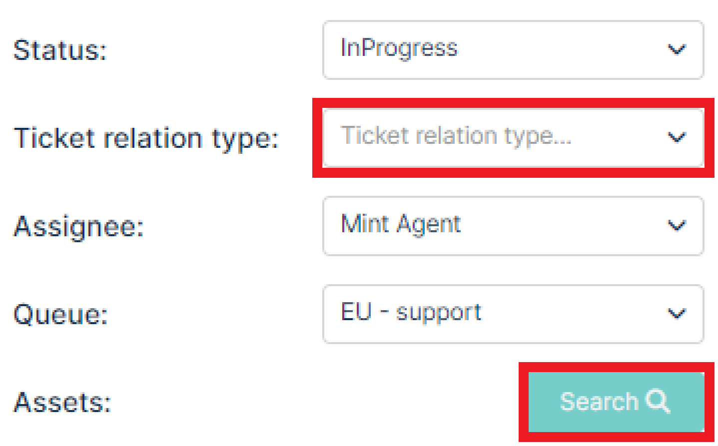


Upper sidebar

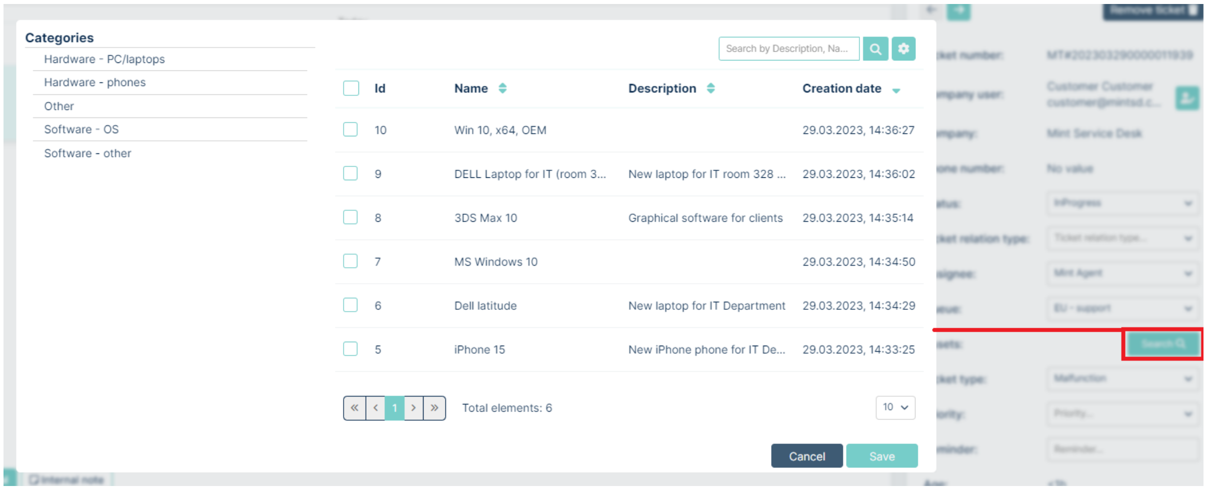
To view the ticket history, press the button. A window will appear where you can see its history. Ticket type, service, queue, etc. changes will be shown here



Take notice, that as an Agent you are able (unlike the Customer) to change most of the details. You can add specific assets to the ticket, but also relate this ticket with any other, if the problem/request/inquiry etc. is similar to some other one.



If you click on of those two positions, you will see a new window, where you can either search for an asset or a ticket you want to add (asset) or relate (ticket) with your problem. Below you can see the look of the window, where you can search for an asset to add to your ticket.



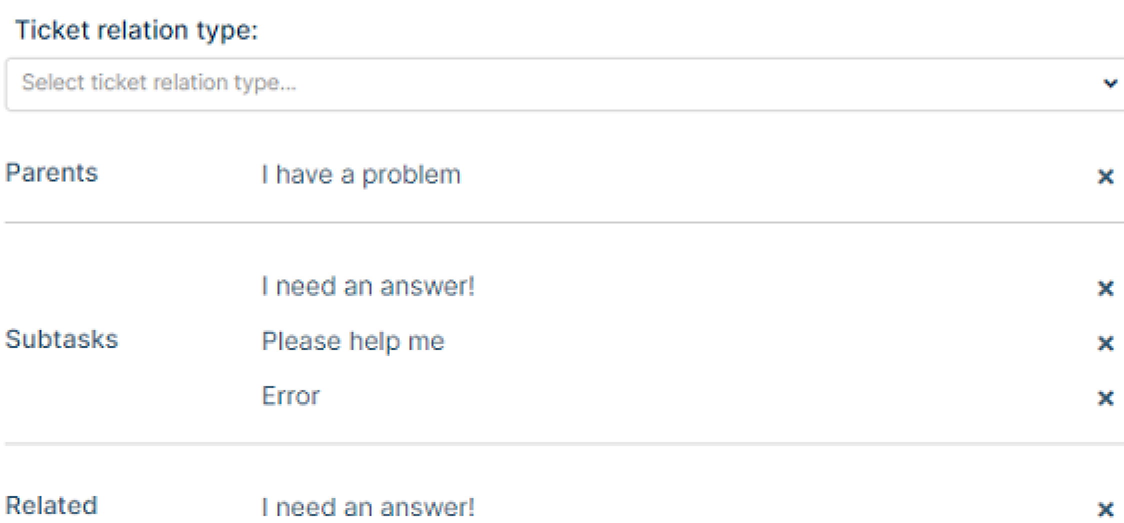
The process of searching for a ticket, you want to relate to yours, looks very similar. The only difference is that you can filter them by Queue or Ticket Type (while for the assets you use Categories).

If any two requests are related then the agent can set this in the **Ticket relation type** field. The agent will have three choices after pressing this button:

- Related
- Parents
- Subtasks

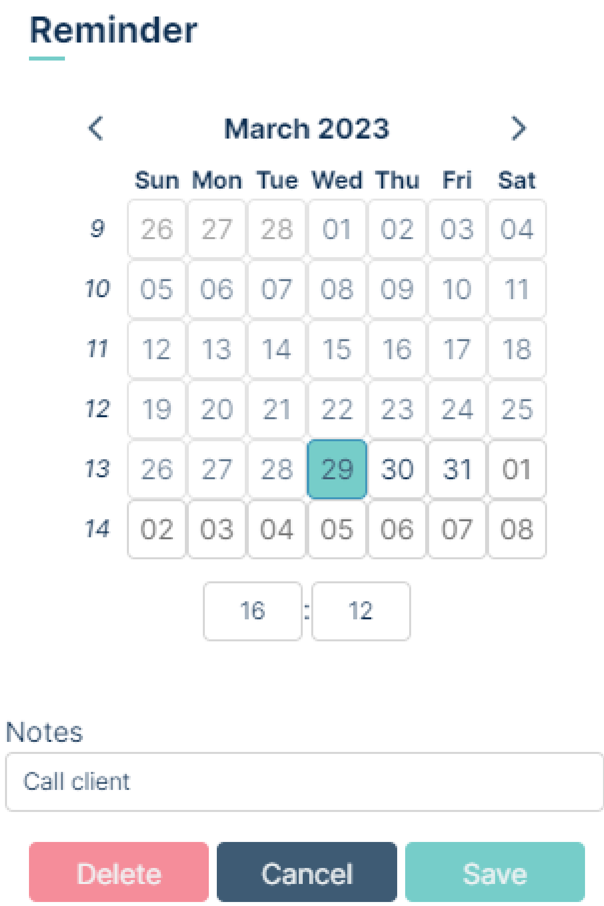
After selecting which option you want to link, you need to select the ticket you want to relate.

The effect of linking several tickets:

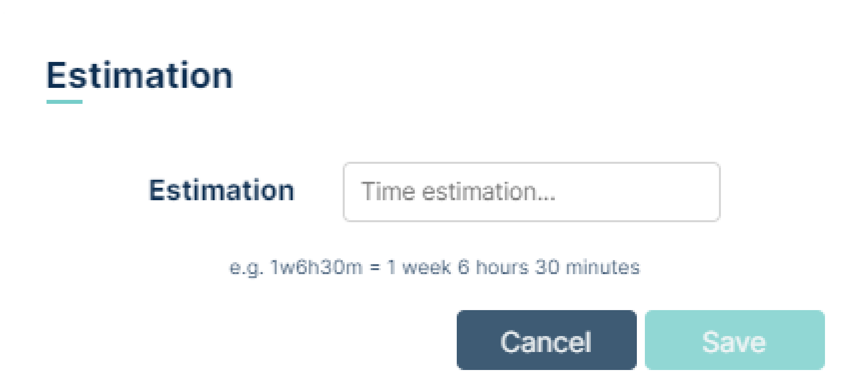


An Agent can also set a “Reminder”, which means that he can select a specific day and time when he will receive a notification (in the MINT system and on agent’s email).

While creating a reminder agent can also write o note describing, for example, the next action to be made.



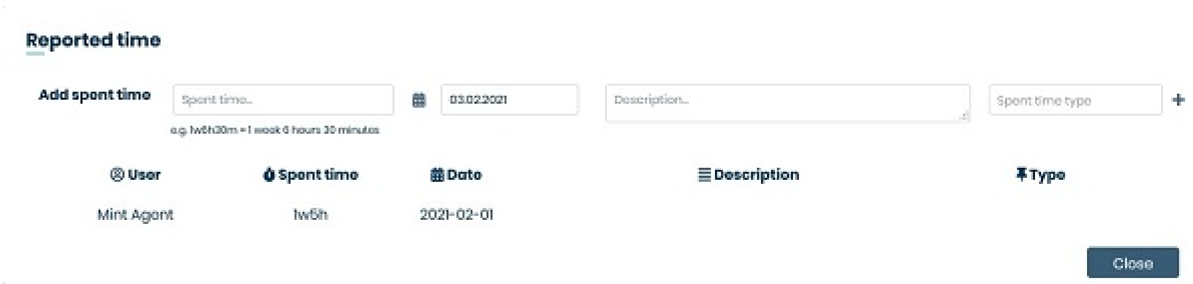
It is also possible to estimate the time in which the deadline for closing the ticket is expected.



To estimate the time, enter appropriate values in the "Time estimation .." field and press the 

button

An agent can report how much time he spent on resolving a ticket.

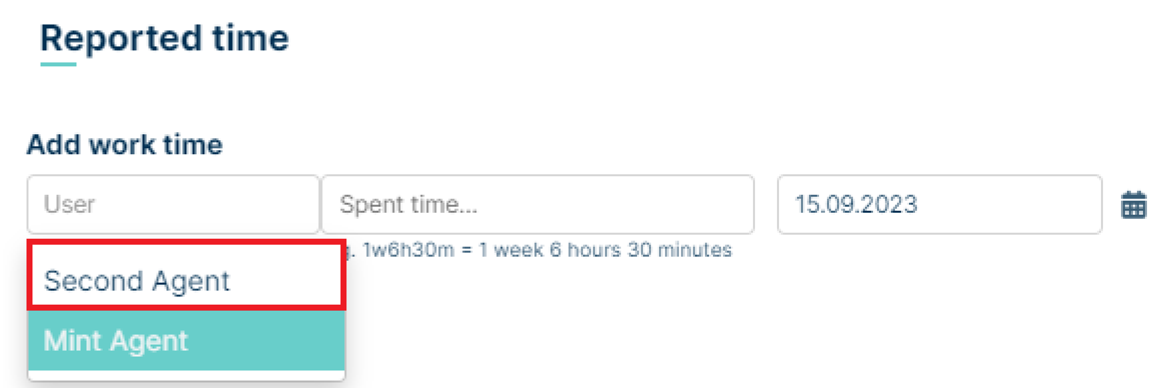


In the **Spent time…** field, the agent enters how much time he spent on resolving the request. In the next column, a day is selected from the calendar. If you want to add a description, you can do it in the **Description…** field. The last thing you can add is **Spent time type** which is set in the admin panel. To add the time spent, click on the + button.

Remember that when entering values in the fields **Estimation time…** and **Spent time…** after entering the number, you must use one of these letters:

- **w:** weeks
- **d:** days
- **h:** hours
- **m:** minutes

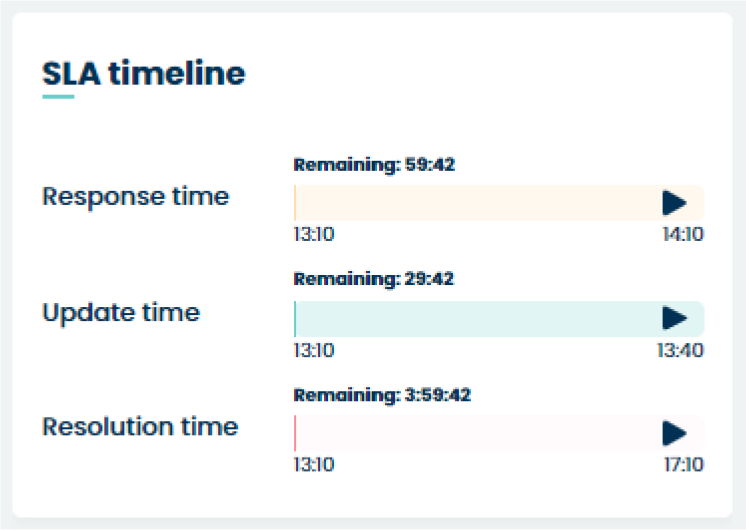
If agent has permission "Work time coordinator" in his Role, he can report another agent's work time in ticket.



Below the 'Details' section, you will find the 'SLA timeline' section showing interactive counters (with progression bars) with time left for e.g. responding to the client or for resolution of a problem. Those timers are refreshed each second and progression bars are filling up. Once any of them is full (or close), the right person (depending on Admin choices made in the Services section) will receive a notification. It can be you or any other agent.

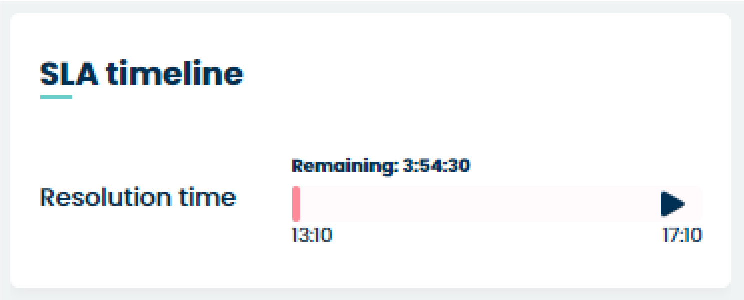
The moment Client creates a Ticket (if he's using Mint) or a new ticket is created from email message, that new ticket will be waiting for an Agent to be assigned to it.

When you, as an Agent enter the Ticket Details of such Ticket you will notice three timers (or less/more if Admin user decides so).

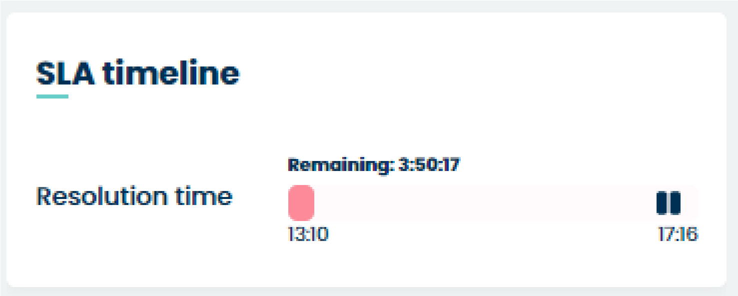


When you assign yourself to a Ticket those timers will not change or stop. However, when you write any message to the Customer, even a simple 'Hi', two of those timers will disappear ('Response time' and 'Update time').

The only timer that stays until the problem is fixed and the ticket is closed is 'Resolution time' which shows the time limit before SLA conditions will be broken.

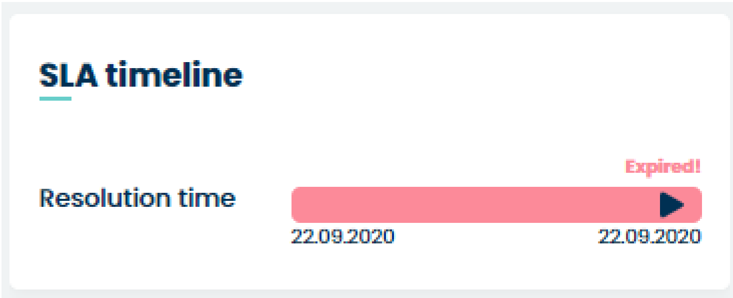


If the Ticket state will be changed to the one which has also a 'Stop SLA' option activated (see 'Admin>Tickets>Statuses) the SLA timer will be stopped.

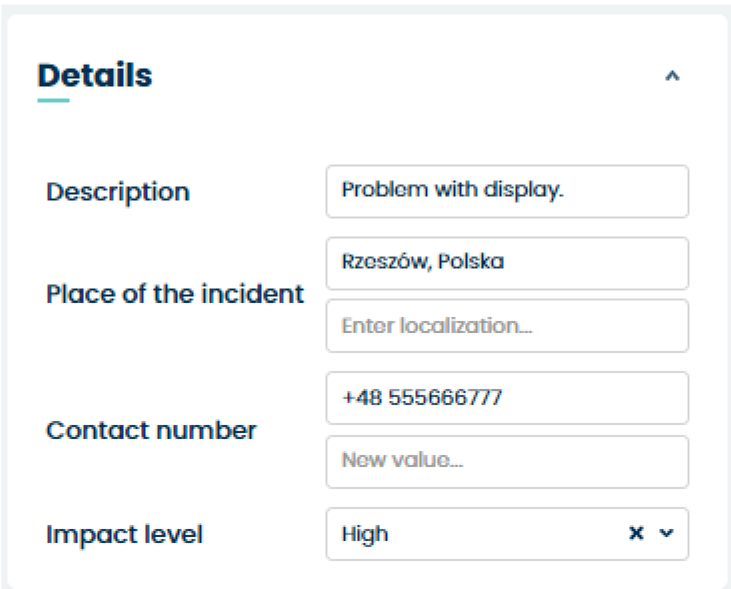


Once the ticket Status is set back to one that has no 'Stops SLA' option enabled, the timer will be running again and counting 'Remaining' time down.

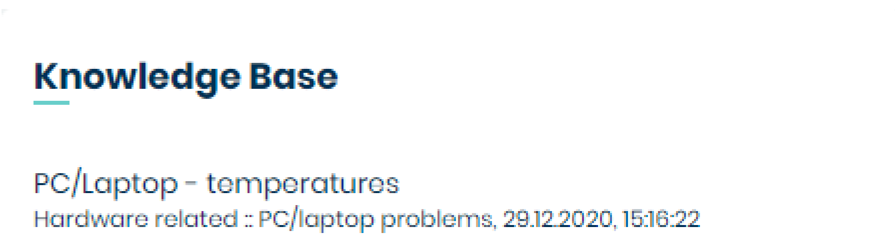
If you forget about the ticket and the timer runs out you will not only receive a notification about it (if it was configured by the admin) but also you will see the timer just like on the following screen.



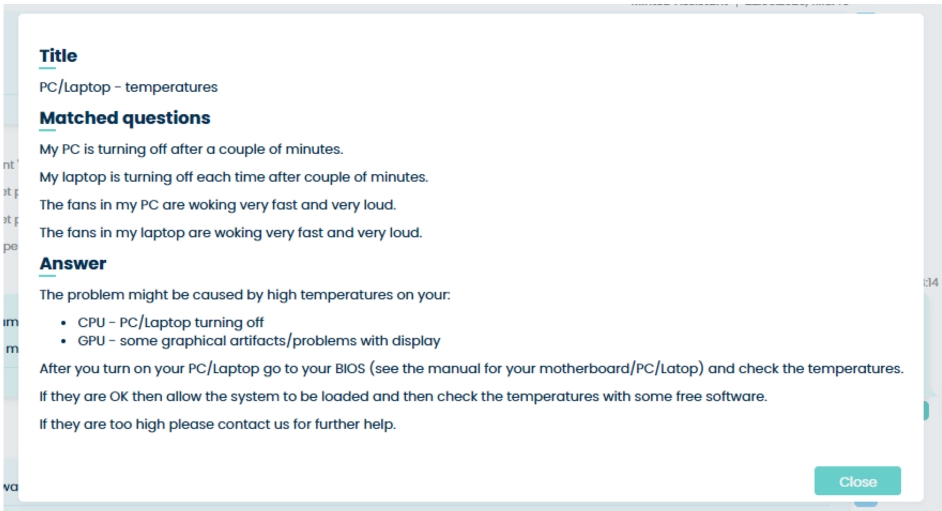
Below the 'SLA timeline' section you will find some additional attributes/information (depending on the Ticket Type you choose earlier). They can be created and managed by the Admin user in Admin > Tickets > Custom fields > Tickets structure – it will be all explained later in this guide.



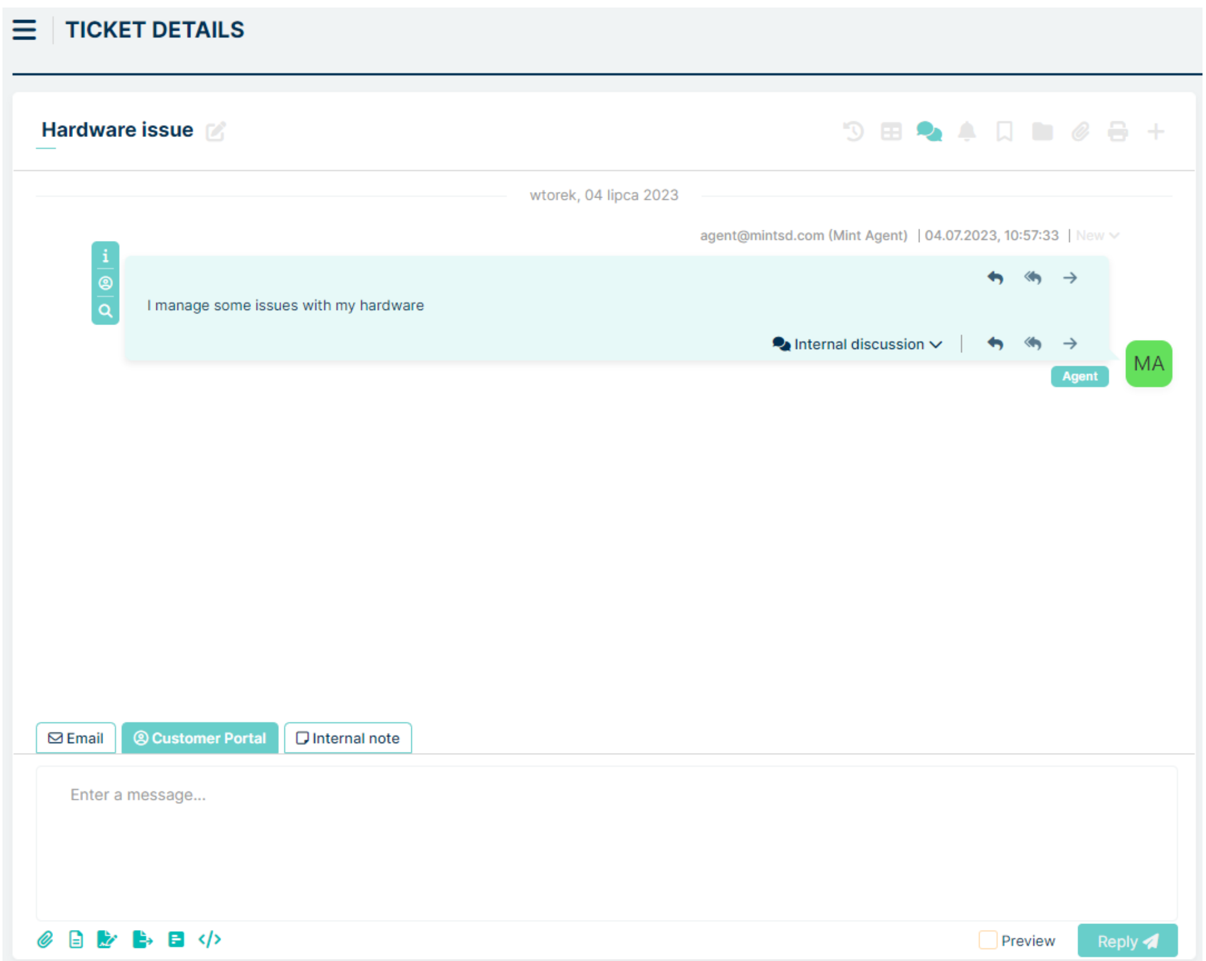
Below the Details, unlike the Customer user, an Agent is able to see the Knowledge Base topics that have been found and might include some useful information or even a solution to the Client's problem. If you don't see any Knowledge Base information here it means that the system has not found any topics in the Knowledge Base database, based on the Ticket's description.



Right here you can also click on the displayed Knowledge Base topic in order to see its details.

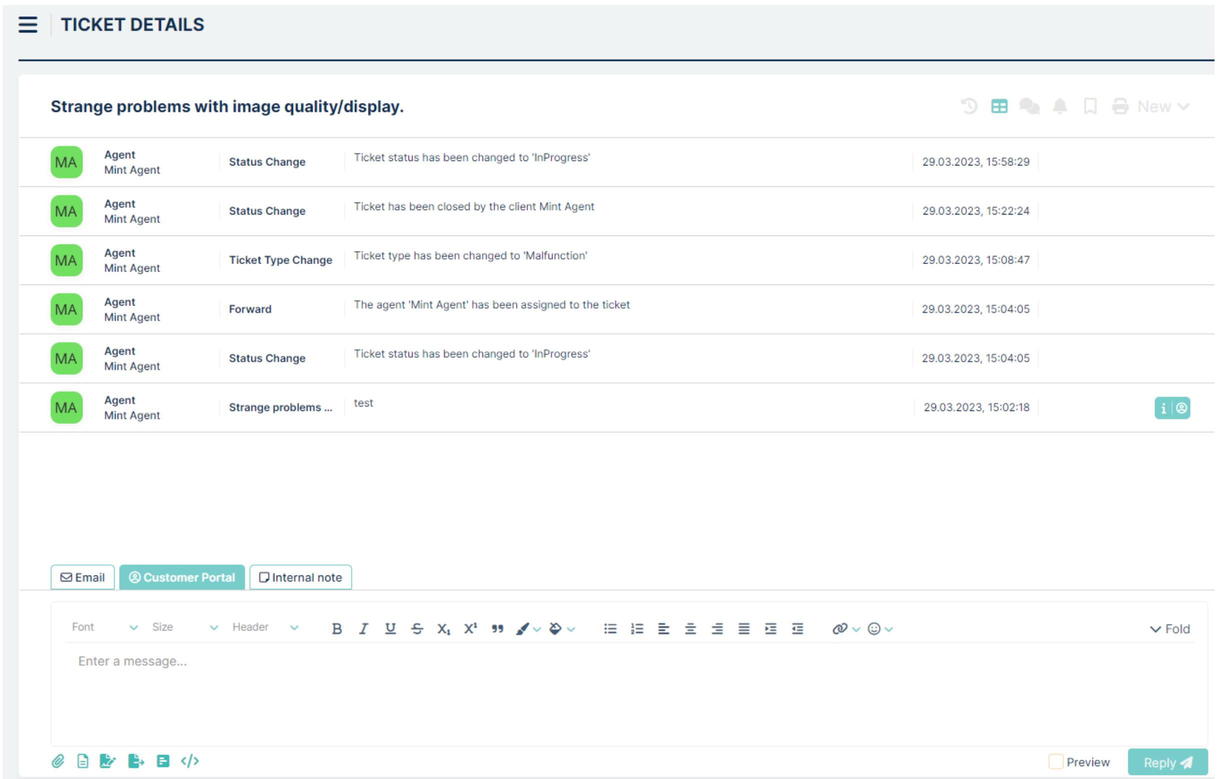


Now let's go back to the main section of the Ticket Details view. The messages and details of the communication are the main part and take the most space.

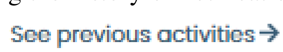


Messages can be displayed in a framed or chat view by selecting one of them  . The button responsible for that is located at the top part of the view.

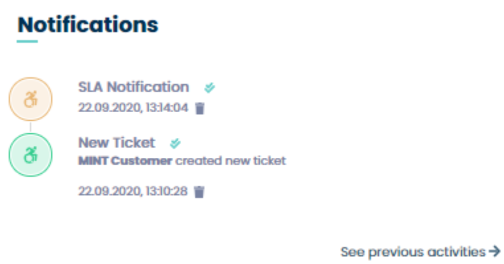
If you switch to a framed view  (chat is set as a default view) you will see the list of messages. To see details of each of them just click on it (screen below).



The next two buttons next to chat/framed view: are used for 'Notifications timeline' and 'Subscribing/Unsubscribing' the ticket.

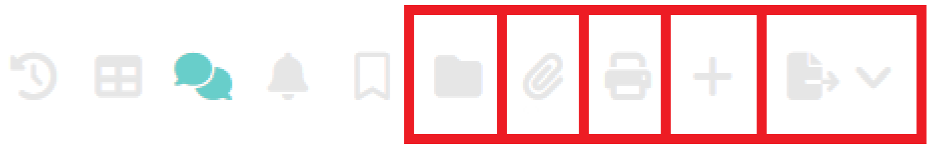
If you click first of them ()you will see a small window containing the history of notifications created for this one particular ticket. If you want to see previous activities just click the 

button.



The second one, once activated () will send you notifications each time something new happens within the ticket.

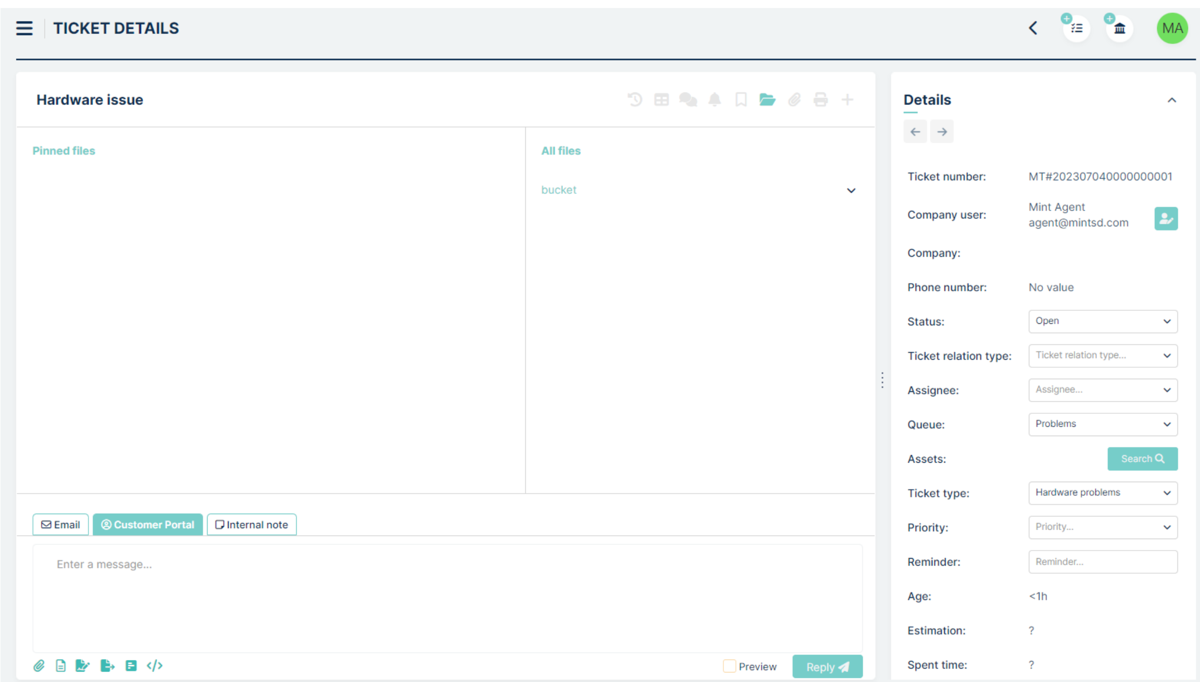
There are also three more buttons we need to describe.



This button () is a File Repository. We will explain it more here.

The file repository is a place for the orderly storage of "MINT" application documents. Each user level has different options for dealing with files from the repository. Agent can pin files from "Buckets" to selected tickets in ticket details and also download files.

After click on () button, we can see tab with Pinned files on the left and All files on the right.

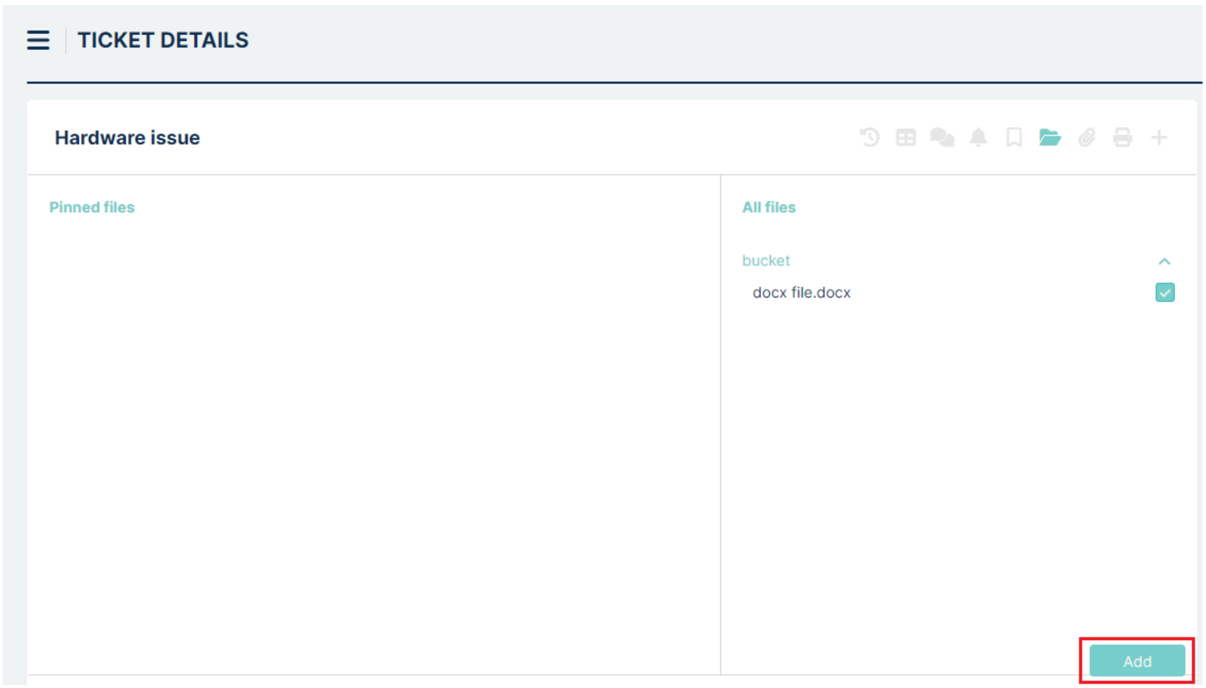


All files section contains buckets and files uploaded by Admin. Pinned files section contains files pinned to ticket from All files section by Agent

Let's try to pin file to ticket. First we need to click on specific bucket and expand it

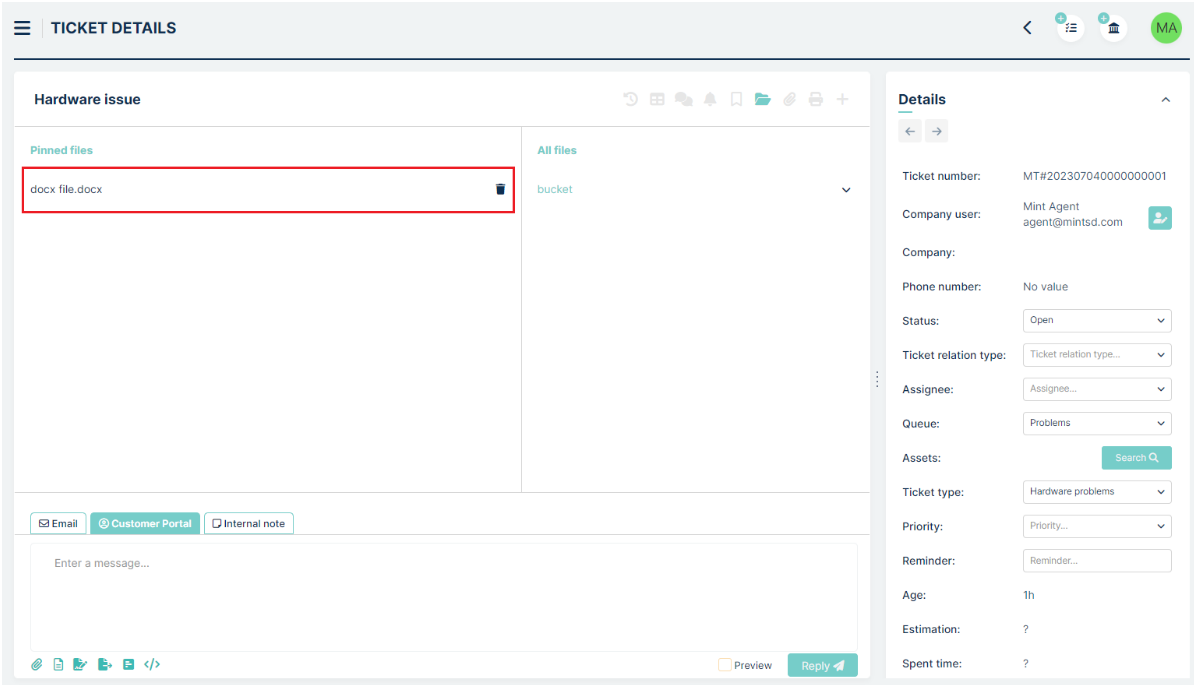
Then we need to select checkbox related to file we want to pin. The 

button appear.

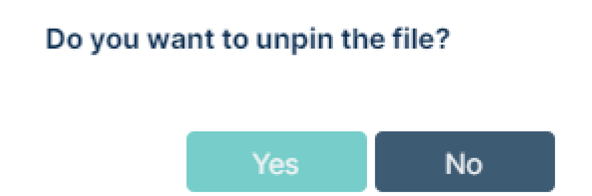


Clicking 

button makes selected files pinned to ticket in Pinned files section. These files will be visible for Customer assigned to ticket.

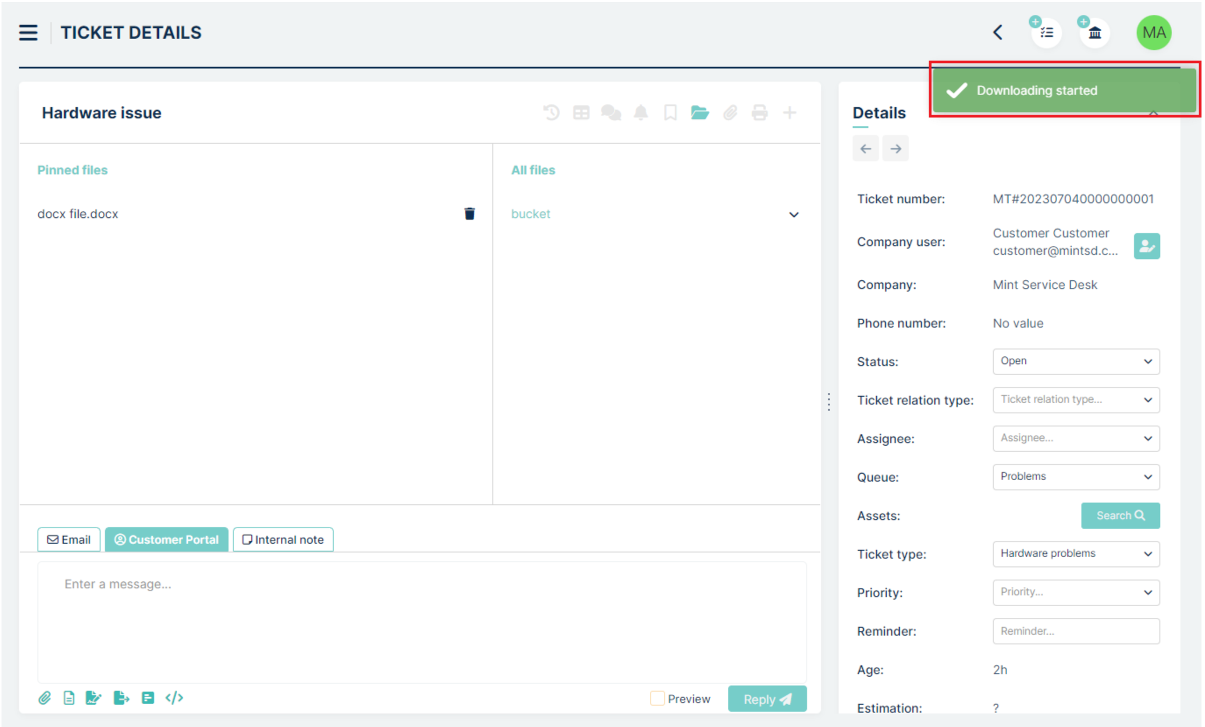


If you want to unpin file, you just simply click () button. After this, you will see the modal to confirm operation:

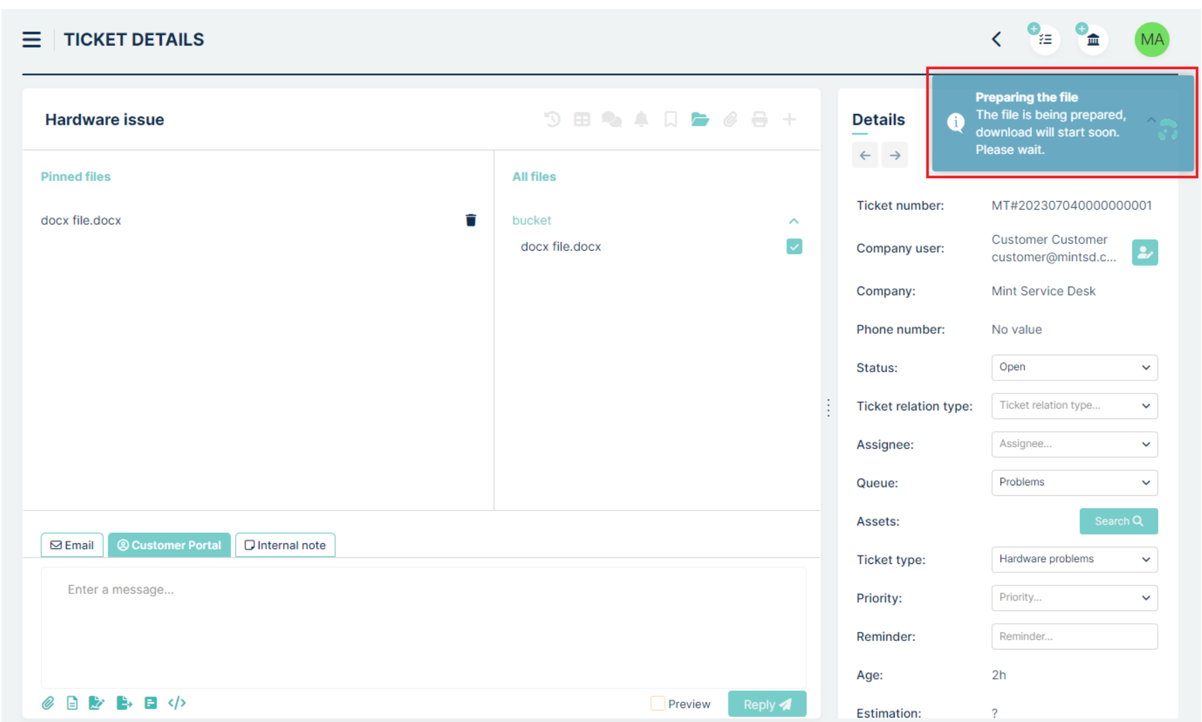


Downloading files

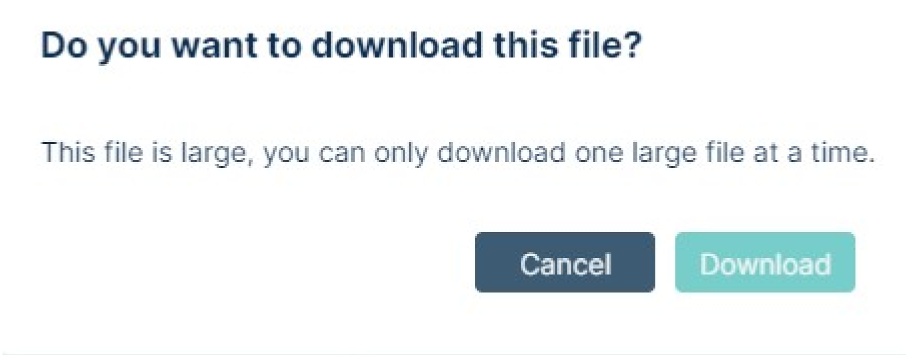
Let's try to download file. To do this, we just need to click on pinned file. If file has less than 20 mb, the toast "Downloading started" will appear.



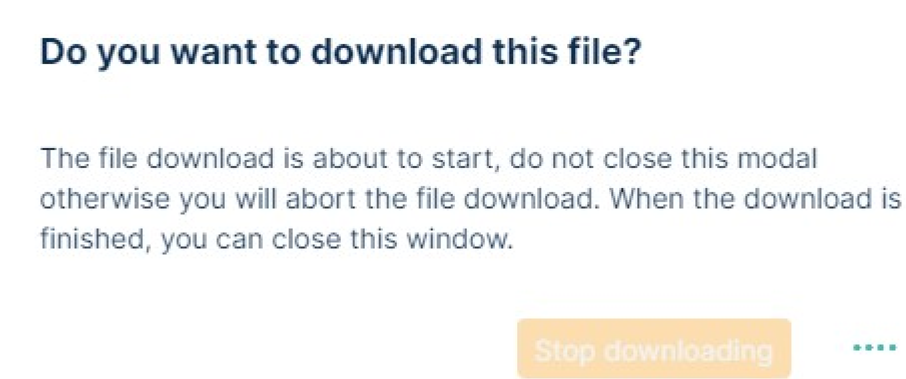
If file has more than 20 mb and less than 1 gb, we have additional toast before above, named "Preparing the file":



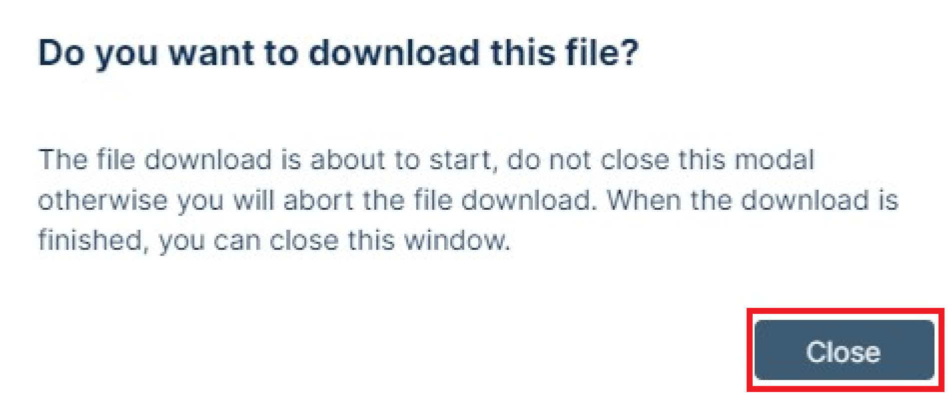
Finally, when file has more than 1gb and we click to download it, we will see information modal:



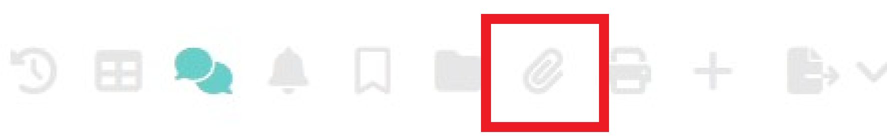
Clicking on “Download” button causes next modal to appear:



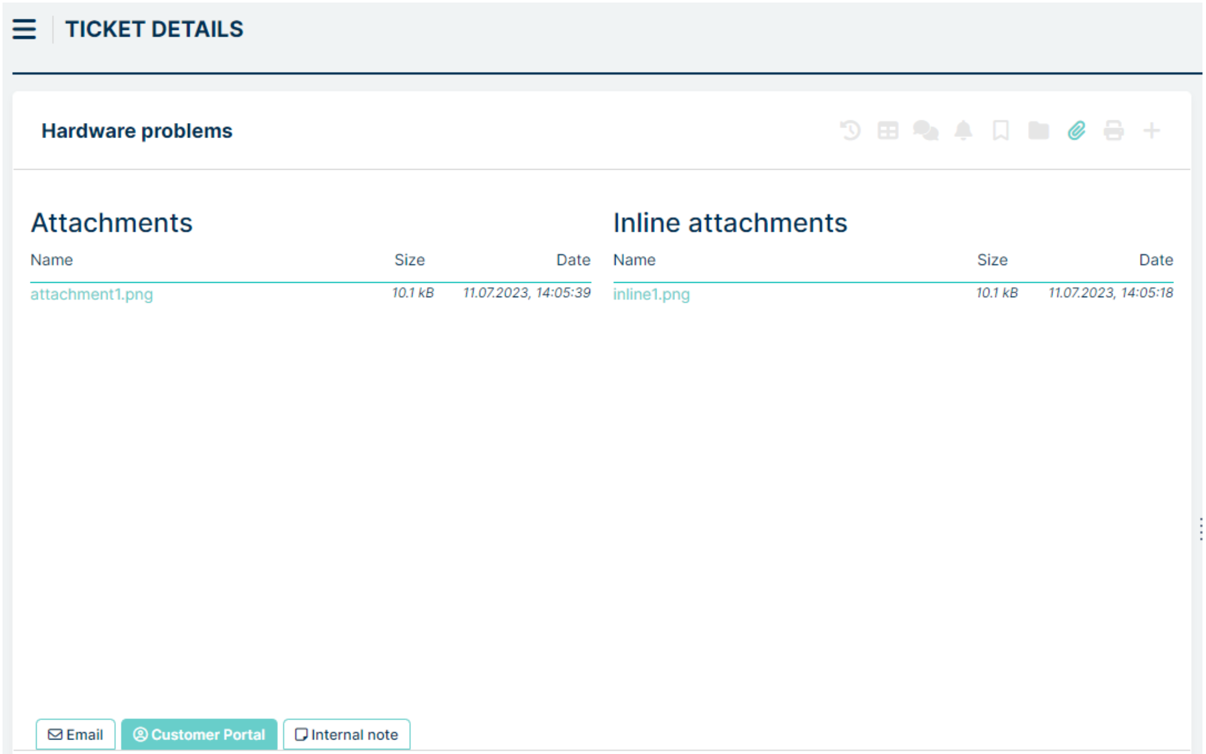
When download is finished, the Close button appear:



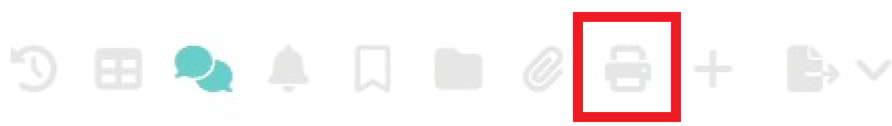
Next button () directs us to Attachment View.



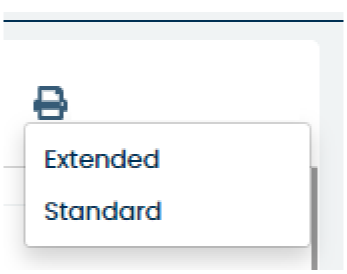
Here we are able to see all files connected to ticket. Left side contains standard attachments, while the right side contains inline attachments. We can easily download them from here just clicking on each file.



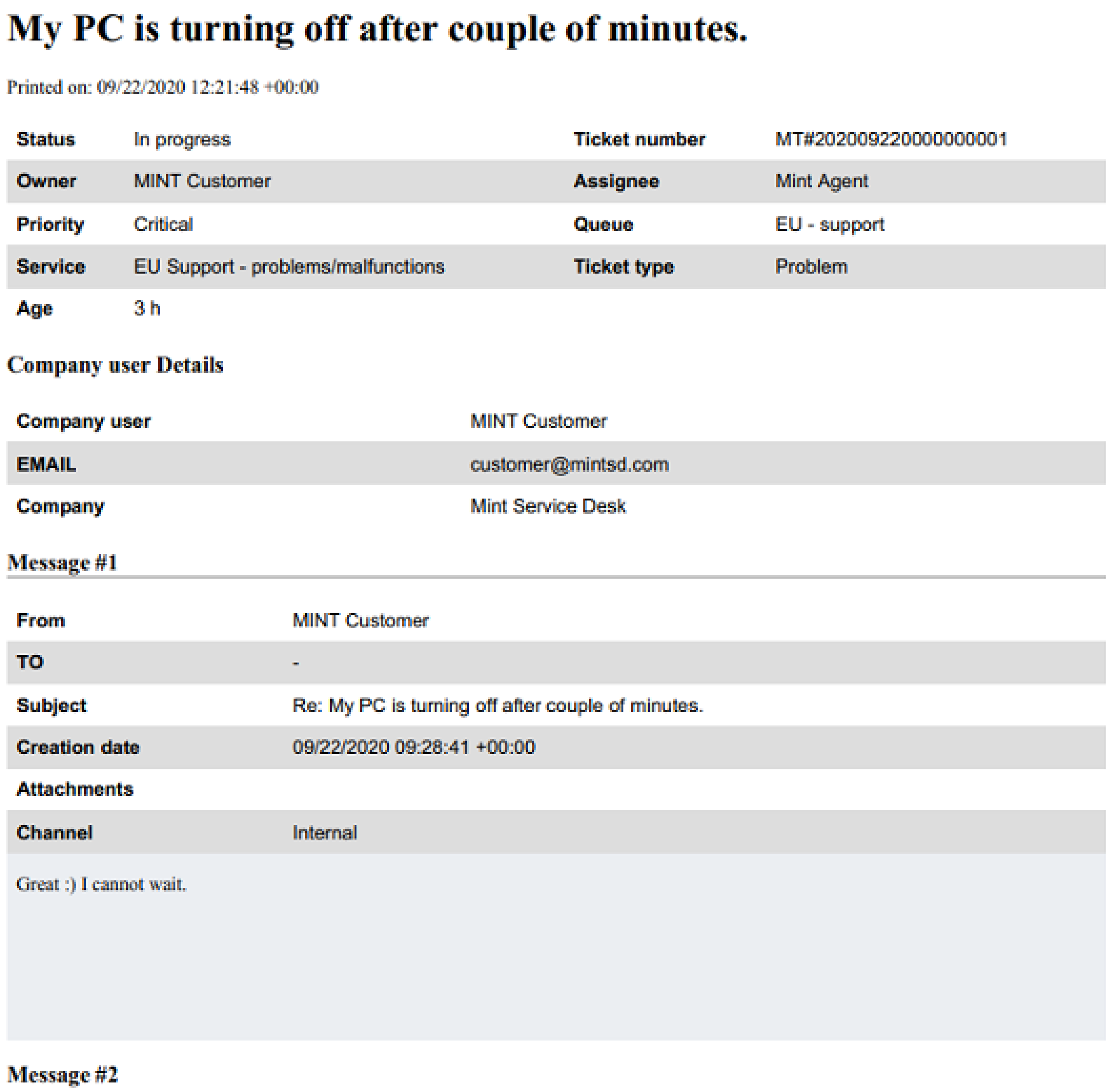
The printer icon (🖶) is used for Exporting the ticket content to .pdf file.



Click on this button and you will see a small list with two options: Extended and Standard.



If you click on any of those positions a new file explorer window of your Operational System will be opened. Select the location where you want the .pdf file to be saved and click Save to save the file on your hard drive. Now go to that place and open the file.



My PC is turning off after couple of minutes.

Printed on: 09/22/2020 12:21:48 +00:00

Status	In progress	**Ticket number**	MT#20200922000000001
Owner	MINT Customer	**Assignee**	Mint Agent
Priority	Critical	**Queue**	EU - support
Service	EU Support - problems/malfunctions	**Ticket type**	Problem
Age	3 h		

Company user Details

Company user	MINT Customer
EMAIL	customer@mintsd.com
Company	Mint Service Desk

Message #1

From	MINT Customer
TO	-
Subject	Re: My PC is turning off after couple of minutes.
Creation date	09/22/2020 09:28:41 +00:00
Attachments	
Channel	Internal

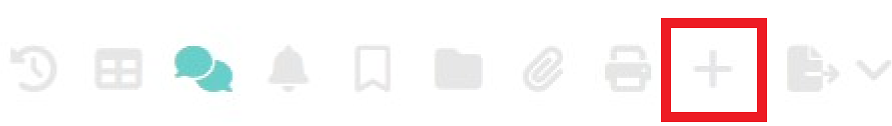
Great :) I cannot wait.

Message #2

The .pdf contains the whole communication between agent and client as well as some crucial information e.g. Ticket owner, Current Ticket Status, Assigned Agent as well.

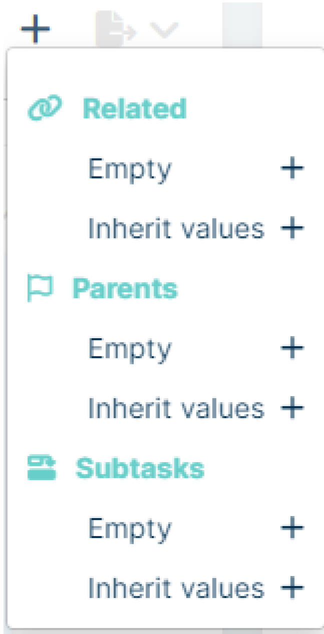
The difference between the 'Standard' and 'Extended' version of the saved .pdf file is that the 'Extended' version also includes system messages such as information about 'Priority' being changed or the Agent being assigned to the ticket.

Another button (+) can be used by the Agent for creating a new Ticket during a conversation with the Customer.



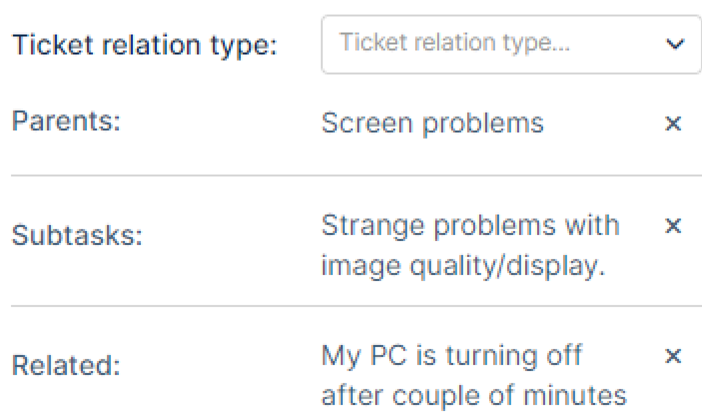
For example, when you're trying to find a solution for a Client's problem and another one emerges, you can create a New Ticket which will be automatically related to already processed Ticket.

To do so click on the (+) button and select 'Empty' or 'Inherit values' from the menu.

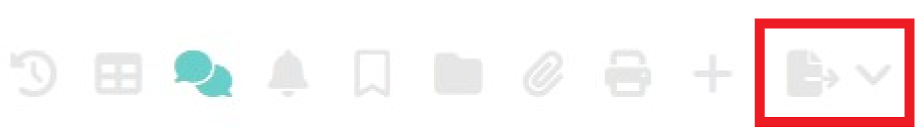


If you choose for example ‘Empty’ field from Related, you will be moved to the standard ‘Create new ticket’ view. Like it was described before, fill up all necessary information and create the ticket. After that ticket will be visible in ‘Related to:’ part of the Ticket details section. If you choose the second option, the only thing that will change is that some fields will already be filled (“Company”, “Company user”, “Subject”, “Ticket type”, “Service”, “Assign to queue”).

You can also create new ticket as Parent od Subtask to current, making similar step as with Related ticket.

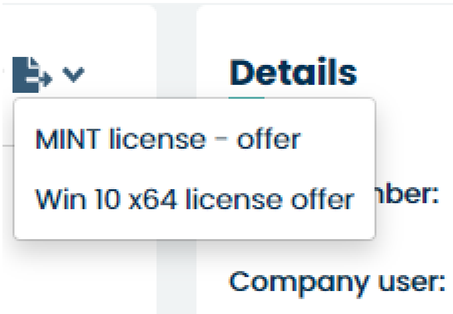


The last button ( ) is used for generating a document.



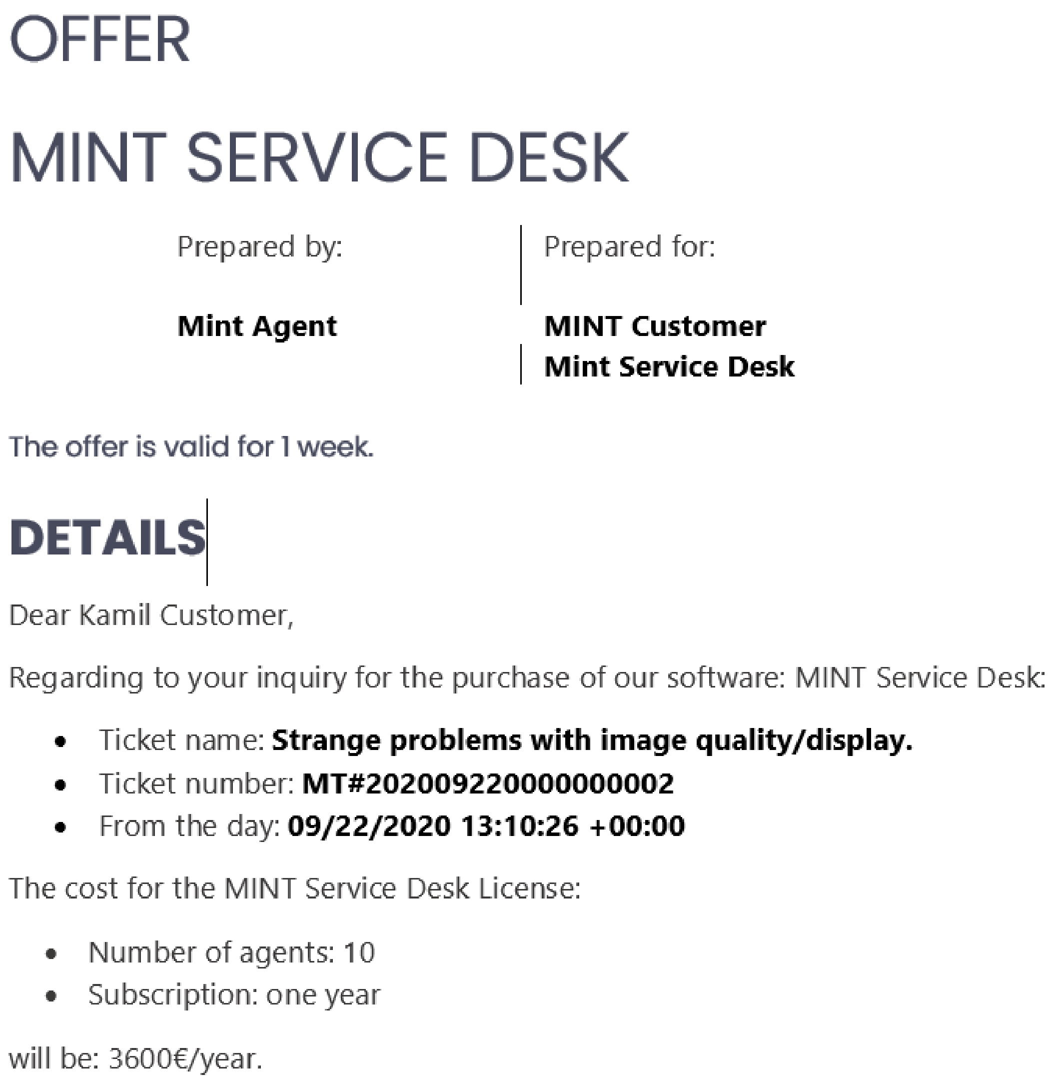
It uses ‘Document templates’ added by Admin to the system and replaces the ‘placeholders’ from the template with real data. Thanks to that you can quickly generate e.g. an offer document when the client asks for that.

To generate a document you need to click the button and from the dropdown menu select the document template you want to use. If you don't see any positions here it means that the Admin user has not created any document templates.



Once you select any of the templates you will have to select a place on your Hard Drive and Save the file. Once you open it the document will have 'Placeholders' replaced with the data taken from the MINT Service Desk.

For better differentiation placeholders that were replaced with real data are bold.



OFFER

MINT SERVICE DESK

Prepared by: | Prepared for:

Mint Agent | **MINT Customer**
Mint Service Desk

The offer is valid for 1 week.

DETAILS

Dear Kamil Customer,

Regarding to your inquiry for the purchase of our software: MINT Service Desk:

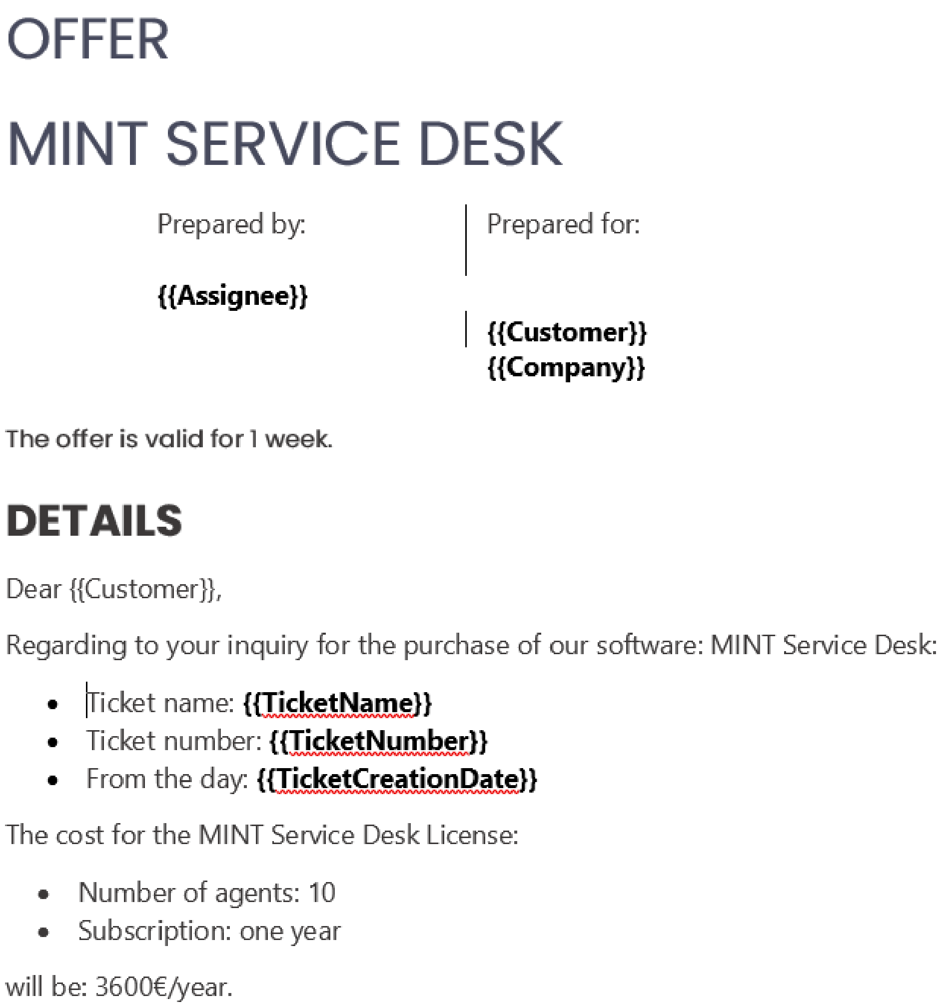
- Ticket name: **Strange problems with image quality/display.**
- Ticket number: **MT#202009220000000002**
- From the day: **09/22/2020 13:10:26 +00:00**

The cost for the MINT Service Desk License:

- Number of agents: 10
- Subscription: one year

will be: 3600€/year.

Now let's see how the offer document template looks like before 'Placeholders' were replaced with data.



OFFER

MINT SERVICE DESK

Prepared by:	Prepared for:
{{Assignee}}	**{{Customer}}** **{{Company}}**

The offer is valid for 1 week.

DETAILS

Dear {{Customer}},

Regarding to your inquiry for the purchase of our software: MINT Service Desk:

- Ticket name: **{{TicketName}}**
- Ticket number: **{{TicketNumber}}**
- From the day: **{{TicketCreationDate}}**

The cost for the MINT Service Desk License:

- Number of agents: 10
- Subscription: one year

will be: 3600€/year.

The whole process of creating Document templates and using Placeholders is described in the Admin > Tickets > Document templates part of this guide.

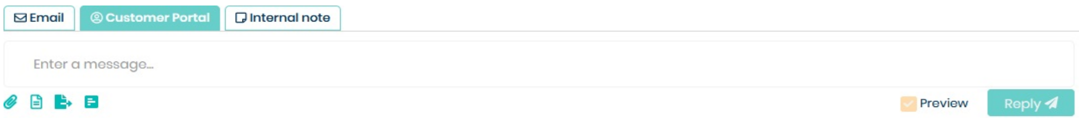
As you can see 'Placeholders' were replaced with real data. If you need to have some specific document template available you need to contact your Mint SD admin user and ask him to add it to the system.

Now, when you have a document filled with data you can print it or e.g. send it to the customer as an attachment.

Let's go back to the communication (chat) part of the 'Ticket details' view'.

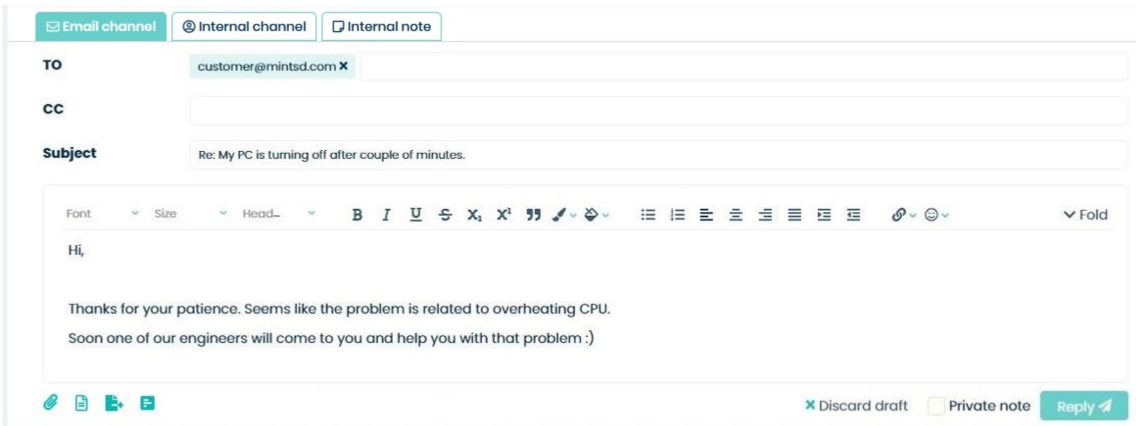
If the message inside the chat contains a lot of text it will we shortened – in order to see the whole text you need to click Show more .

Now, if you want to write a message you can type it in the text box and send it by clicking on Reply button.



As an Agent, you can send messages in three ways.

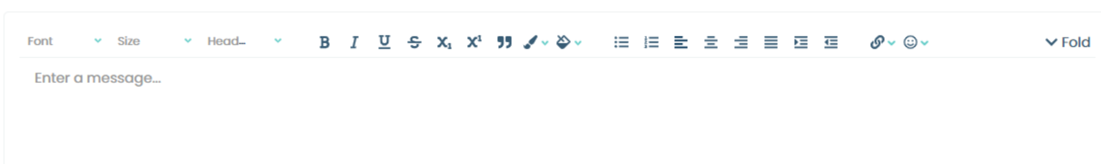
The first one, "Email channel" is used for communication with a client who's using his email account (and not MINT Service Desk system). If you want, you can also add someone in CC to receive a copy of your message.



Second one, "Customer portal" is used for communication with a client who is a registered user and has an account/is using the MINT Service Desk system.

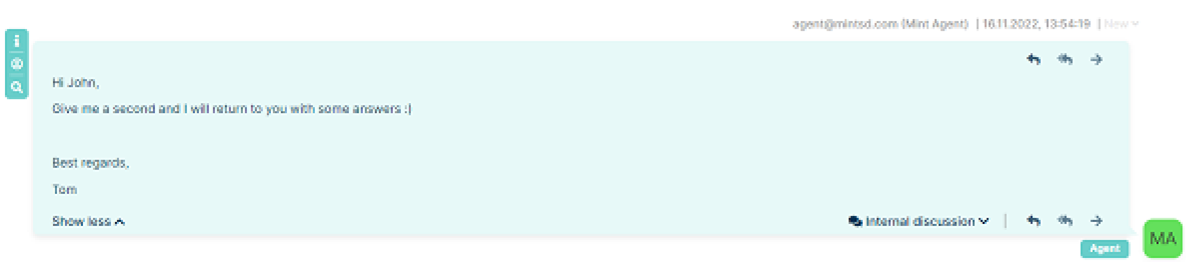
Third one, "Internal note", is used for creating notes about ticket etc. What you write in this section will not be seen by the client.

In all cases, you can format your message by using the text editor, which will be displayed once you click on the 'Enter the message…' field.

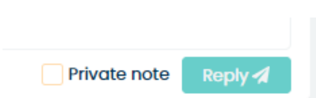


Once you click the 

button, a message will be sent and you will see in on the chat.



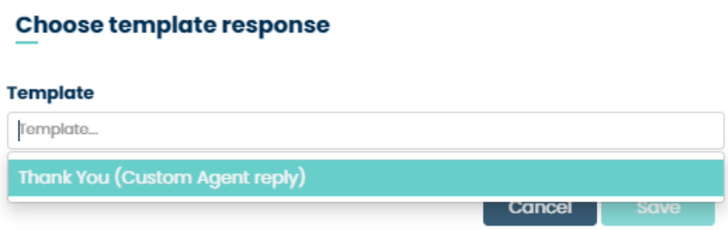
Always remember that the communication within tickets is very important. The cool thing is that as an Agent you can check the "Private note" option (located at the bottom) in order to send internal messages which will be visible only for Agents and not for the Customers.



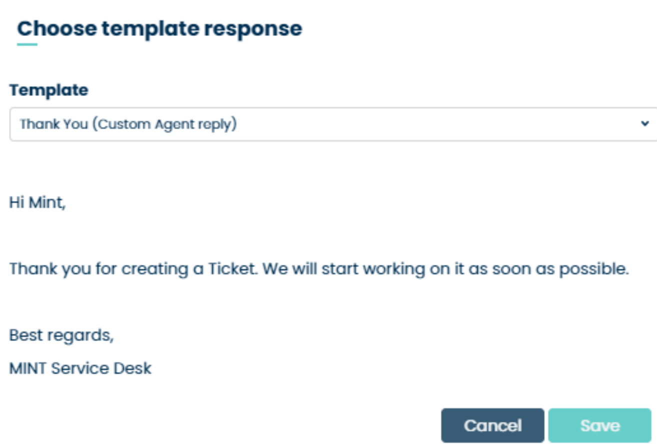
Another very important thing is that if you want to send messages to the customer **you need to uncheck this option**, otherwise the customer won't be able to see them.

Apart from attaching some files (pictures etc.) to your message, you can also select custom-made answer template instead of typing each time the same message to each of your customers.

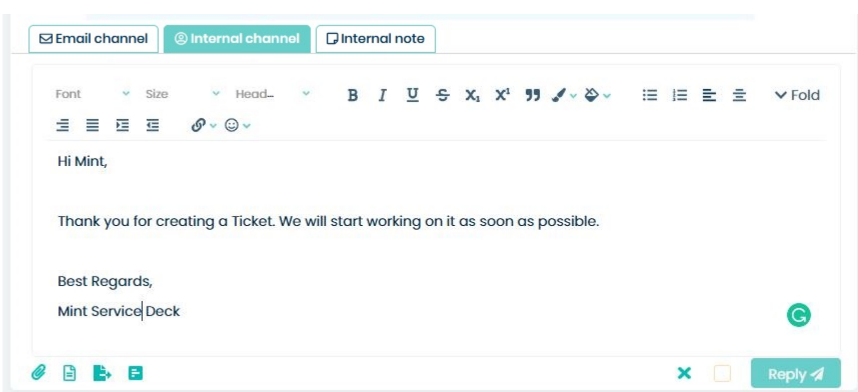
Click 'Custom template' and in the 'Choose template response' select one from the list. Remember that in order to see any of them on the list they need to be first created by the Admin and marked as Custom templates (not system ones) and with the right queue attached. See the 'Admin>Tickets>Templates part of this guide for more details.



Once you selected the template its content will be loaded right below your selection.

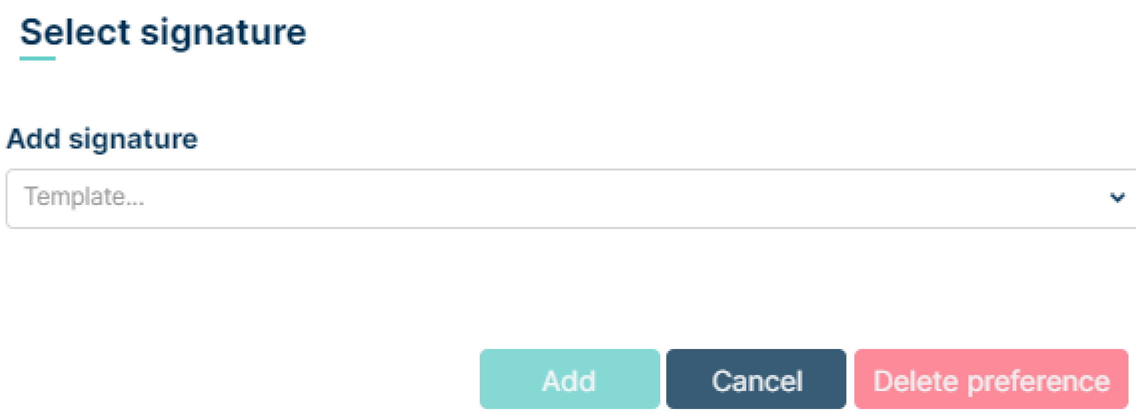


Click Save and the text will be moved to a Rich Text editor where you can change the message before sending.



The next thing you can do before sending the message is that you can attach your signature. To do that you need to use the 'Add signature' option.

After pressing this button, the agent will be taken to the signature selection.



After selecting a signature, a preview of this option will be displayed.

Under the preview it says 'Set as default automatic mail signature for this queue' checking this option means that this signature will be automatically included in emails.

To add the selected signature to the application, press the Add button.

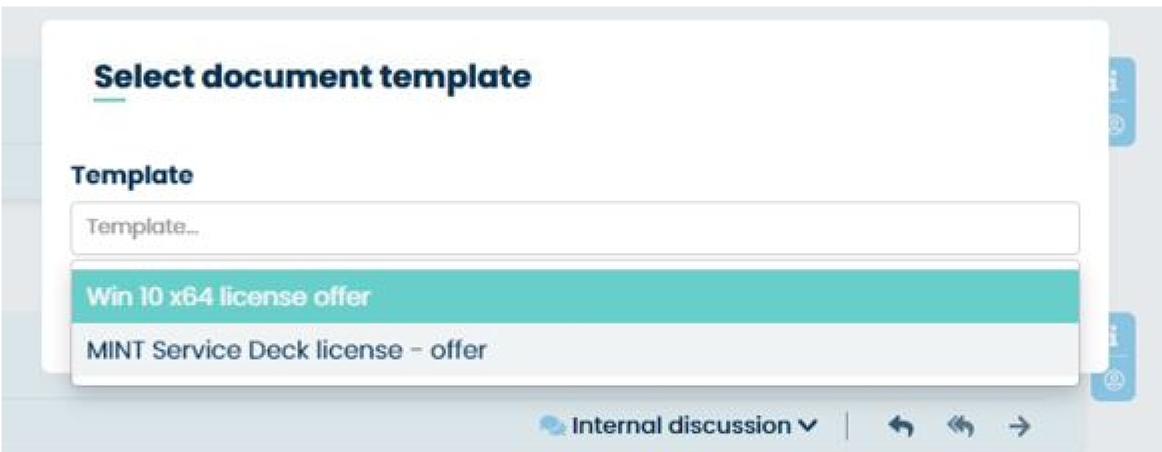
To cancel adding a signature press Cancel button.

To remove the signature preference, press Delete preference button.

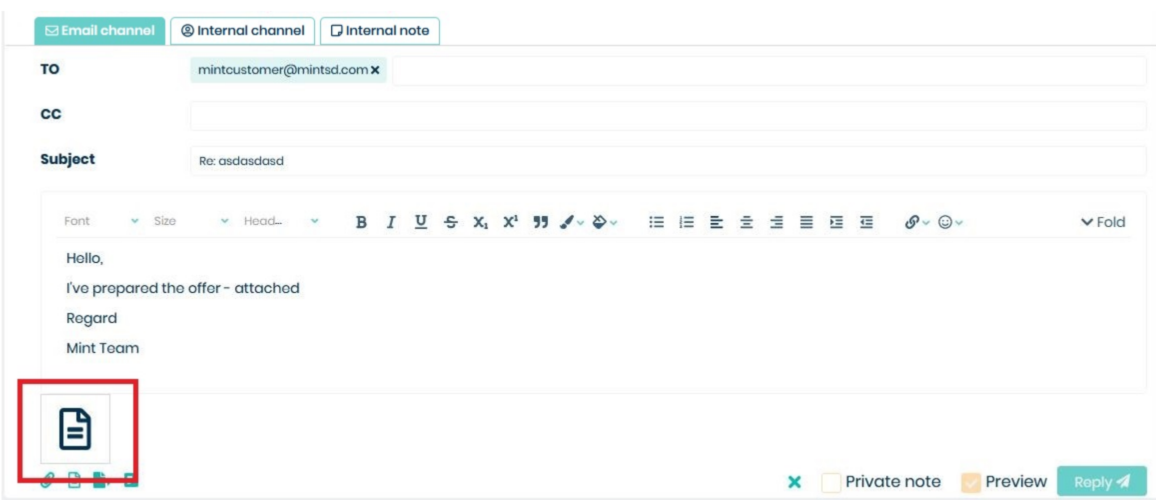
The next thing you can do before sending the message is that you can attach a document based on a template (Admin > Tickets > Document Templates). To do that you need to use the 'Attach document' option.

Click on the 'Attach document' located at the bottom of the communication section inside the 'Ticket details' view.

Inside the 'select document template' window select the document template you want to use and click Save.



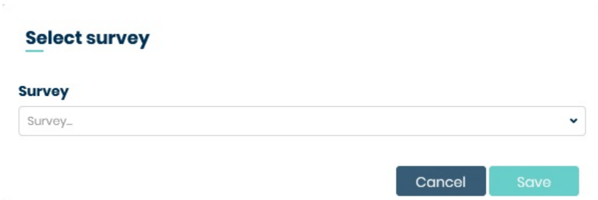
The document template will be filled with data (on 'Placeholders' place) and automatically attached to the message (but not sent). Now, you can type some message and send it, along with the document, to the customer.



If you want, you can check if the document is correct before you send it. Just click on the attachment miniature, save the file on your hard drive, open it, and check for any mistakes.

The next thing you can do before sending the message is that you can attach a survey. To do that you need to use the 'Select survey' option.

Click on the 'Select survey' located at the bottom of the communication section inside the 'Ticket details' view.

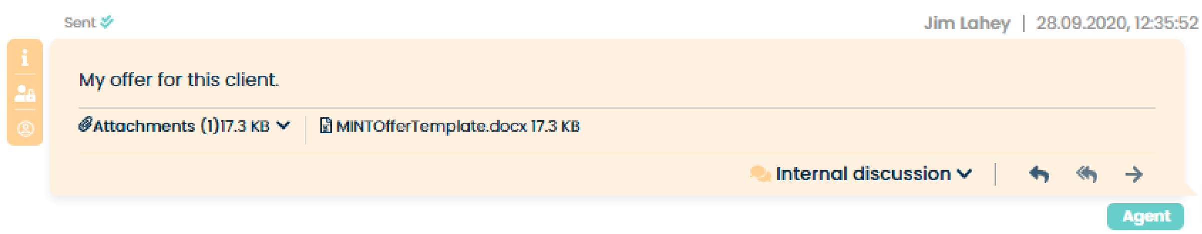


Choose which survey you want to select and click the 

button

The last thing is that you can also leave such documents for you for later to see. For example, if you switch the message tab to "Internal note", and attach/send document here, the client will not see it, but you will.

Click 'Reply' and you will see a new internal message.



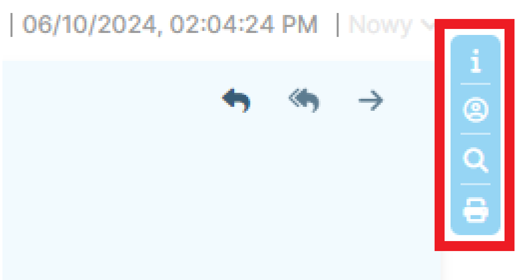
Now, whenever you want to check what kind of offer you sent to the customer you can download it from here.

The other important thing within communication is that you can add some internal comments next to any internal message and by that to start an "Internal discussion" with other agents in order to discuss the problem. Just click on 'internal discussion' in any of the messages and type a message in 'Talk to another agent' field.

Thanks to that you can keep track of the answers in one place rather than adding new 'private messages' in the main chat. You won't have to scroll down the whole communication and look for the answers.

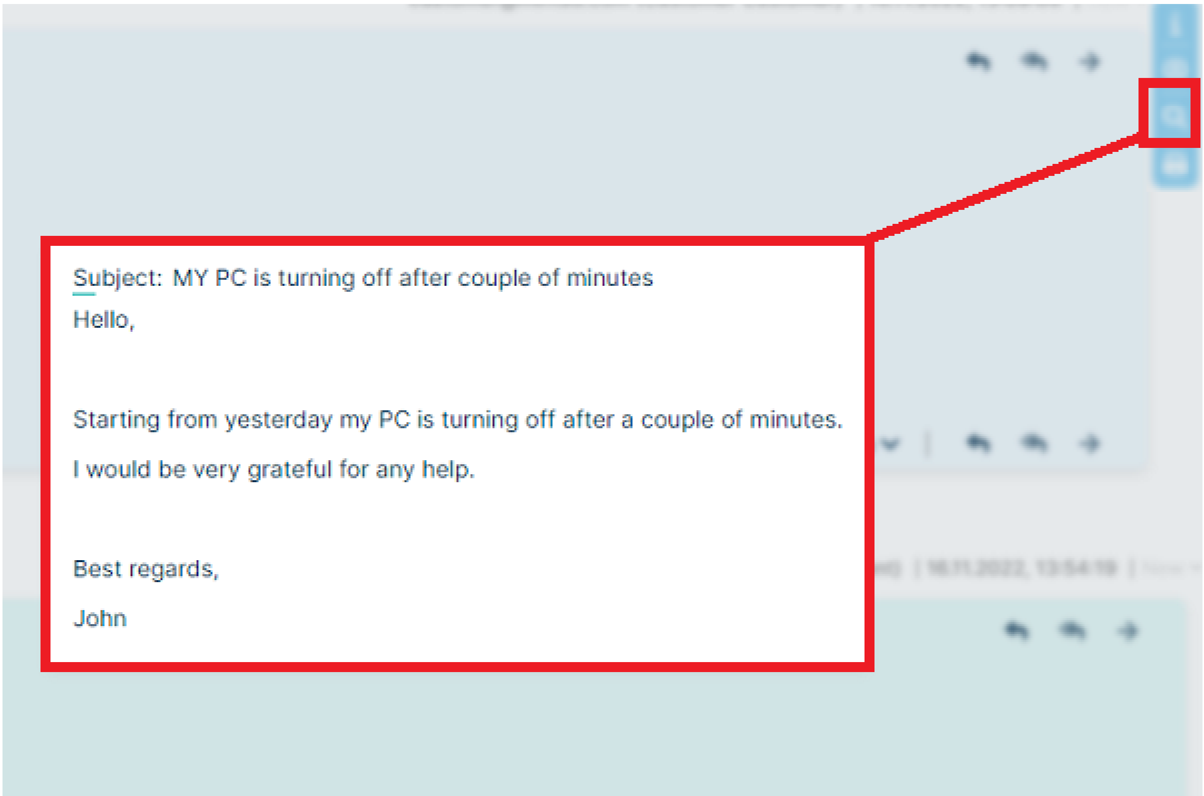
When you reload the view or come back to the ticket after some time, you will notice that internal discussions are hidden. In order to see them, you need to click on the (1) Internal discussion link.

The next thing, as you probably already noticed, is that there are some small icons on the side of each article/message.



The upper one contains some basic information like a channel of communication, message's author, etc.. To see this information you need to click the  icon. The second one means that the message was send by system user.

Pressing the third button  will display a preview of the article.

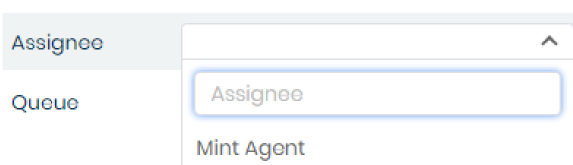


The last button () works similarly to the same button in the top right corner of the ticket screen, but it exports the selected article instead of whole ticket. It is also saved in PDF format.

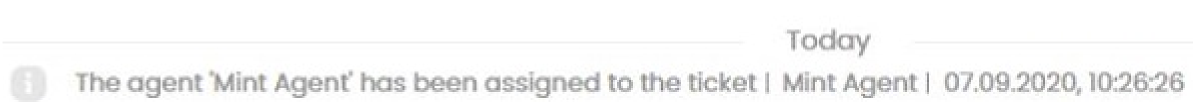
When there is a new message or system information waiting for you within the Ticket Details, apart from receiving notifications on the sidebar, the moment you enter the Ticket Details view you will see, on the bottom part of the Chat section, the following message.

You can either click ‘See’ to see those new messages or click mark them as already read.

Last, but not least, always remember that **New Ticket will always wait for someone to be assigned to it**. If you write (as an Agent) a message inside the Ticket chat, you will be automatically assigned to the ticket. The other way to do it is to click on the “Assignee” part of the “Details” section and choose yourself from the list.



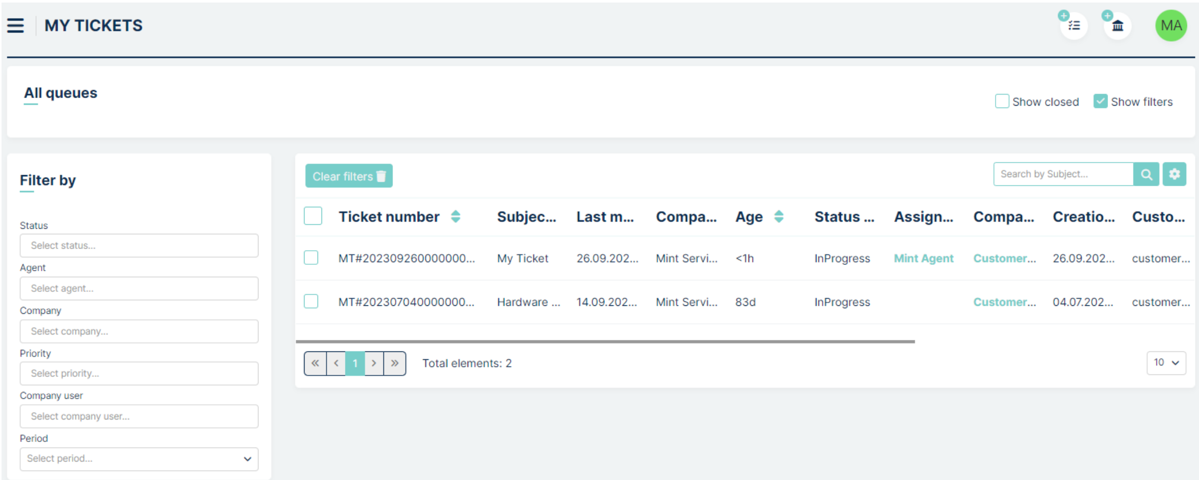
In both cases, a new internal message will be displayed for you in the communication part of the “Ticket Details’ view.



4.4.4 MY TICKETS

This function can be enabled or disabled in admin profile in Settings => General => Tickets

The "My Tickets" feature is an additional dashboard with a list of tickets that we are the authors of (that we have created - both as tickets and as email requests) and applies to both the agent and the customer.



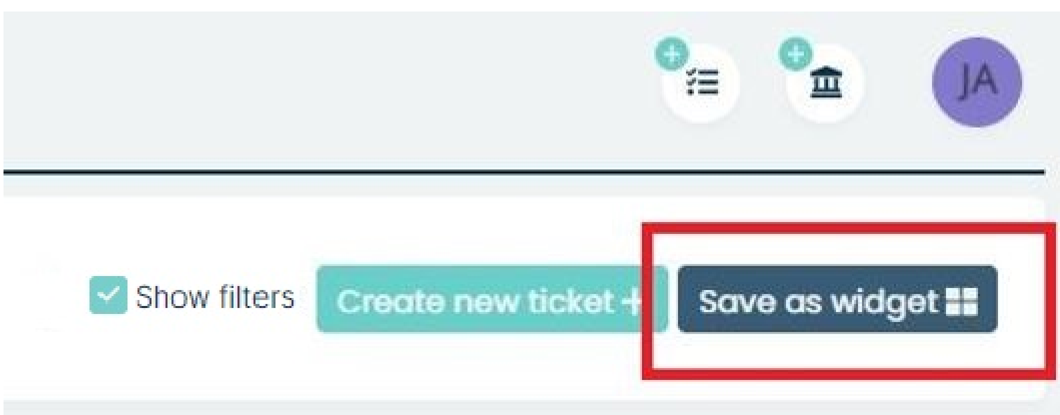
This functionality allows us to follow the life cycle of a ticket even if we do not have access to it due to permissions. This allows the user to view basic information such as the queue, type of submission, assigned person. Entering the details of the requests depends on the agent's permissions to the queue and the request type.

The "My Tickets" view consists of a panel containing tables with requests, a side panel containing basic filters, and a top panel containing "Show Closed" and "Show Filters" checkboxes. The table has basic columns with information such as status, queue, agent, for example.

Navigating "My Tickets" is the same as the dashboard and is described in the "Dashboard" section

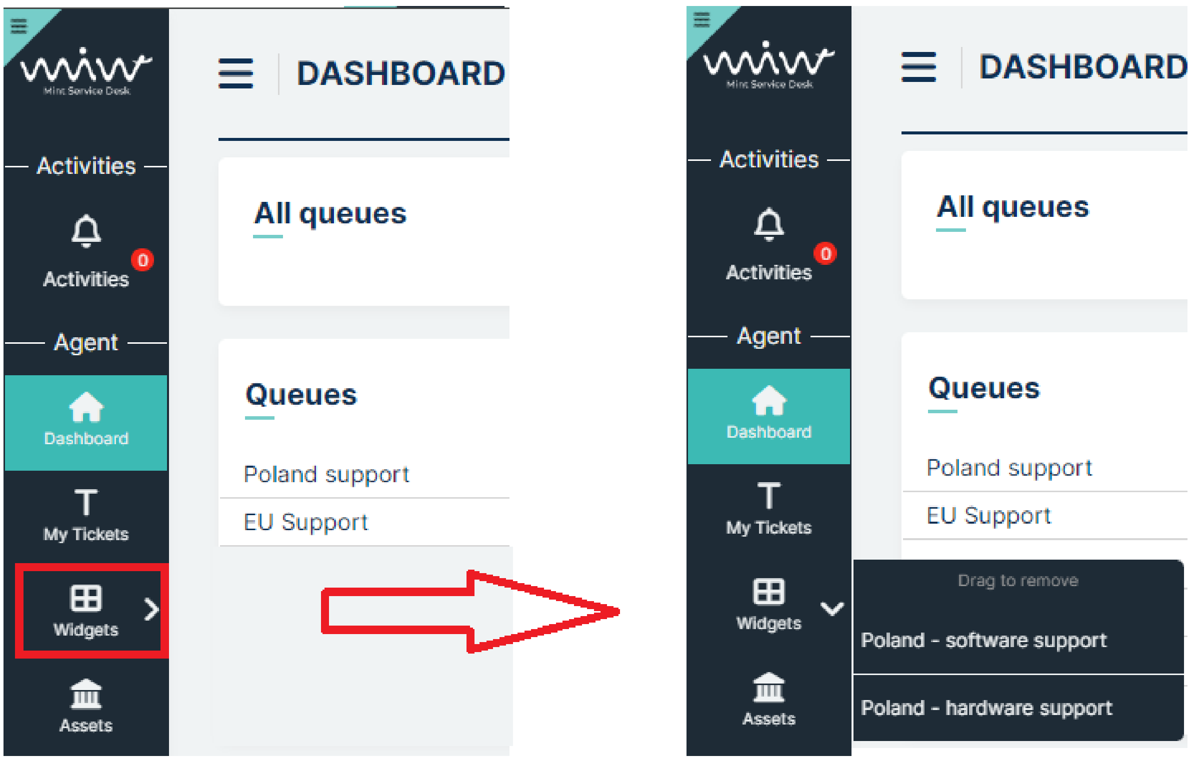
4.4.5 WIDGETS

The cool thing when working as an Agent is that you can create your own custom 'Widgets'. For example, if you want to have a quick way to see only new tickets from one particular queue you can use filters, and then when you see what you want you just click on the button 
.



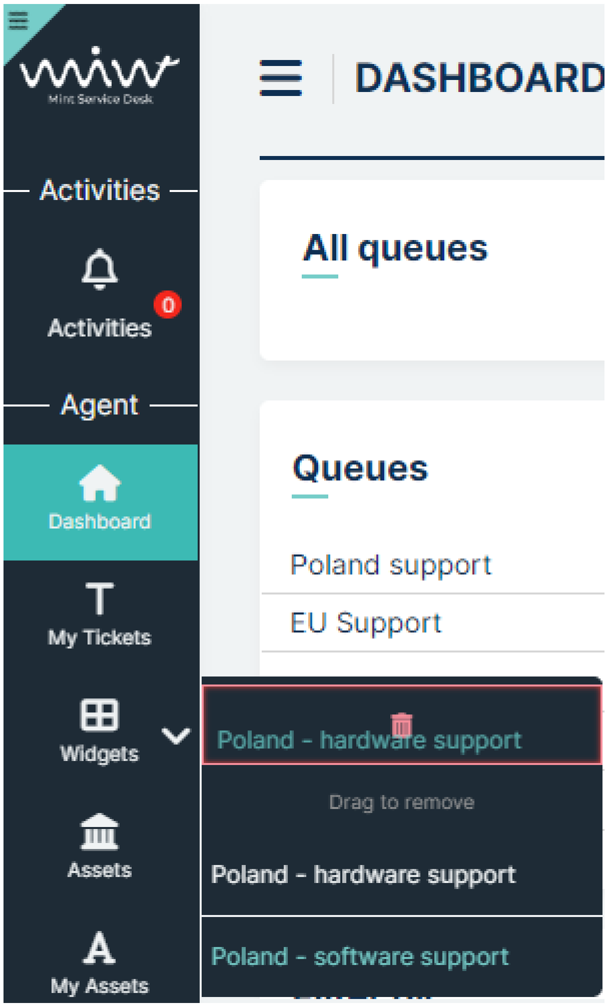
A new window will appear, where you need to type the name for your widget and click on the 
 button.

After you do that, on the left side menu, in the 'Widgets' section, you will see a newly created widget.



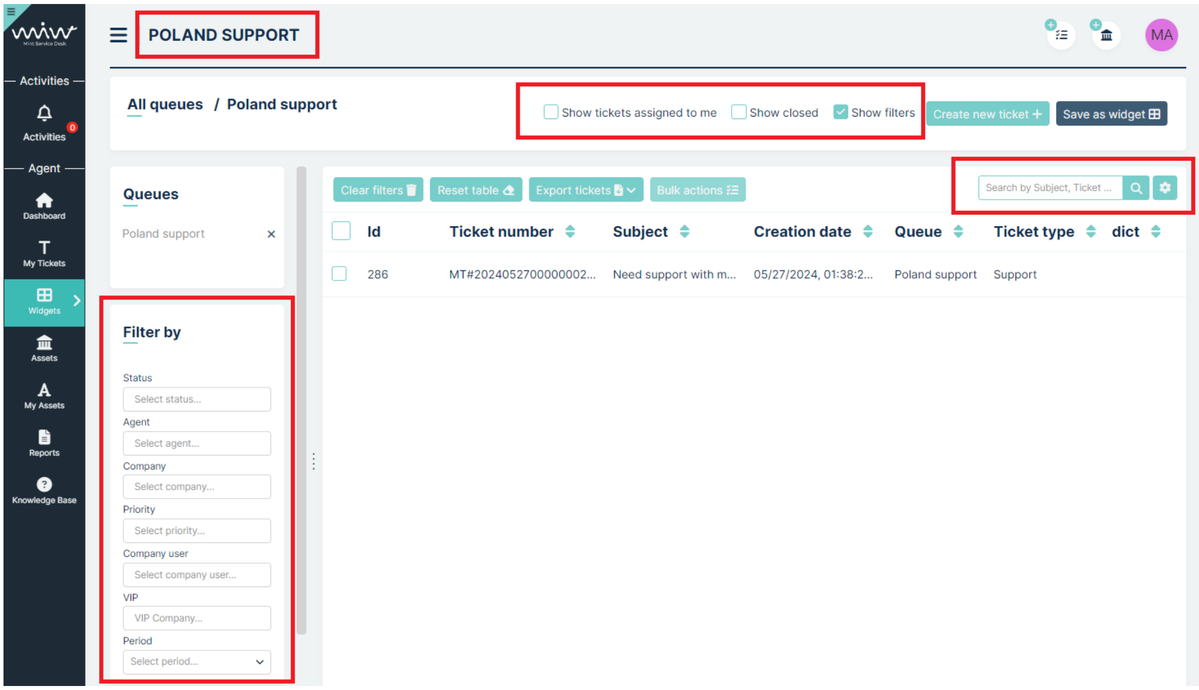
Now, you can click on in at any time and you will see custom information based on the previously saved filters.

If you want to delete the widget just click on in with your Left Mouse Button and while holding it drag the widget up over the Trash Can icon (it will be invisible until you move the widget up).



Now release Left Mouse Button and the widget will be removed.

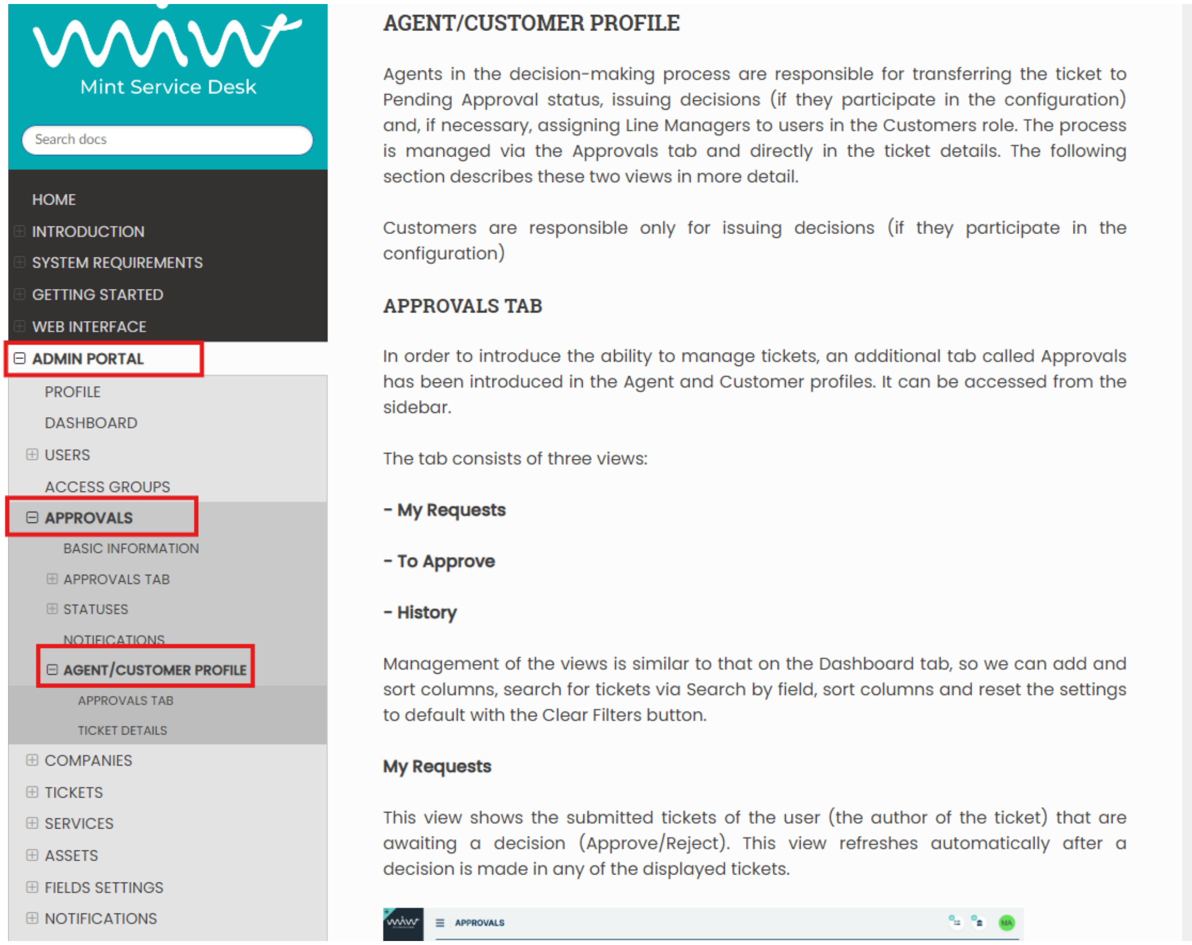
The widget view is similar to the desktop view - we can filter and search for tickets. When you are in the view of a particular widget, its saved name is displayed at the top of the page.



Remember that upon re-entering the widget, the filter settings will revert to the originally saved ones.

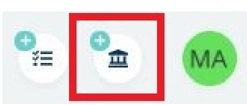
4.4.6 APPROVALS

To see the description of the Approvals tab, please visit Admin portal -> Appvovals -> Agent/Customer profile

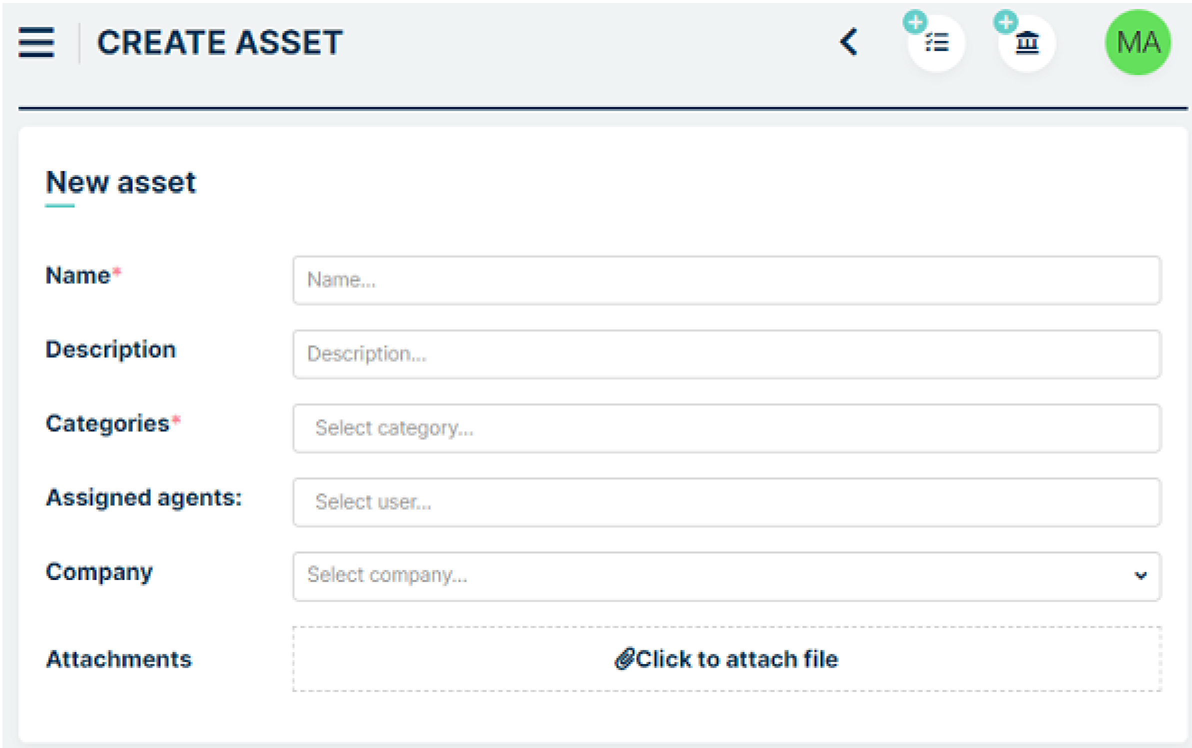


4.4.7 NEW ASSET

On the top right side of the agent portal, the bar menu also displays the button of the feature "New asset" that allows agents to create new assets.



Once you click on this button, a new asset creation form will be displayed. Right here, an Agent can create a new asset.



Now, an Agent needs do put in the required information (marked with *): “Name” and select the right “Category”. He can also add a detailed “Description” or some attachments.

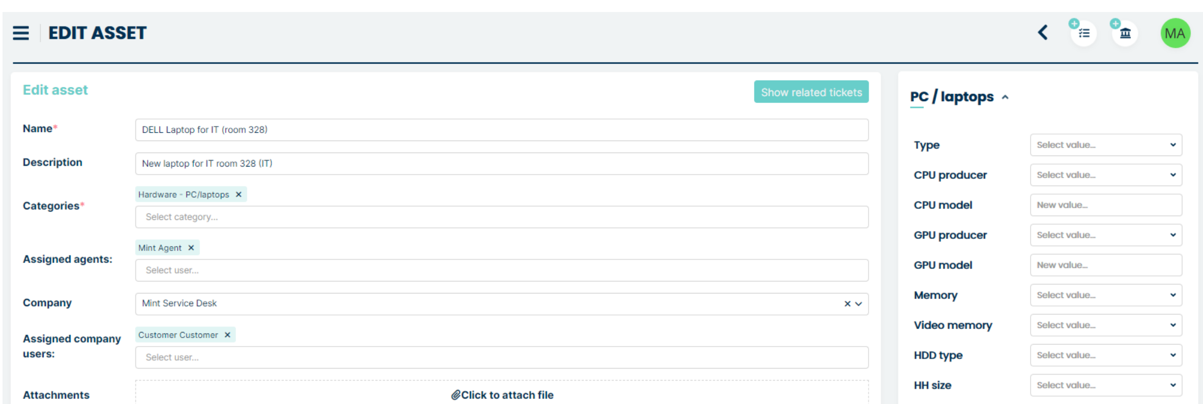
The available categories are related to the configuration of user rights.

Also, an agent can attach some particular user to this newly created asset by using the ‘Assigned users’ option and selecting one (or more) user from the list.

Once all of the information is ready, click on the 

button.

The screen will be reloaded and you will see that some additional fields have been created on the right side. Those are additional attributes available for the particular Category of Assets. They can be created and managed by the Admin user.

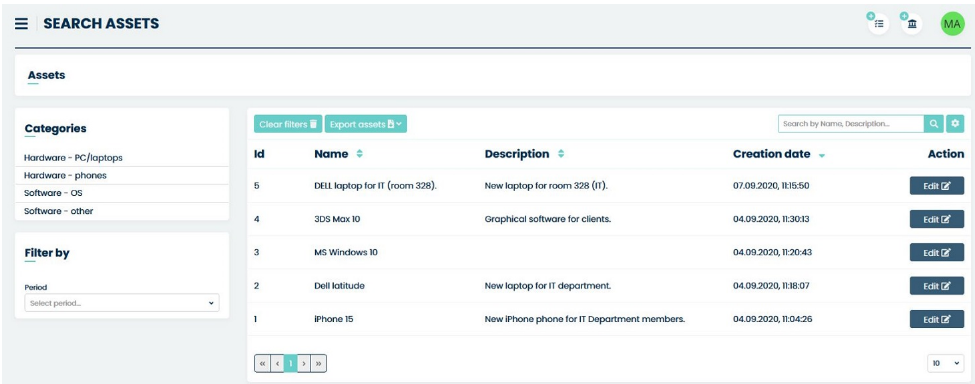


Once you add that additional information, you can update the asset by clicking on 

button.

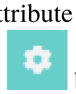
4.4.8 ASSETS

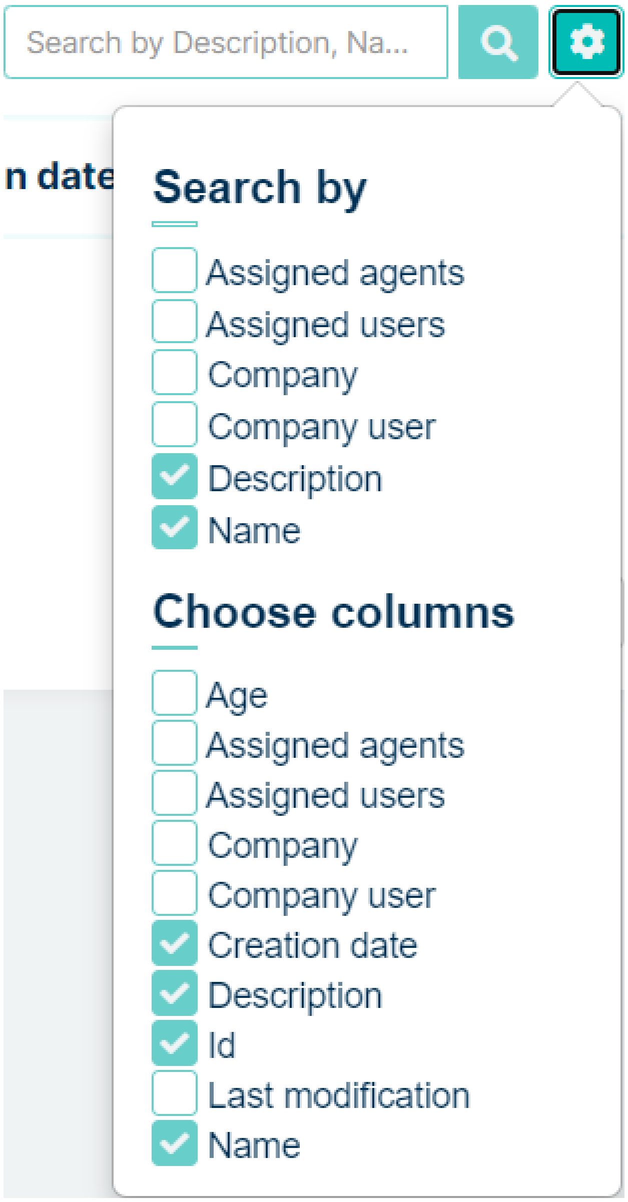
The default view in this section shows the list of available assets, along with some filtering options.



Right here you can filter assets by 'Categories' or by 'Period'. If you want to reset active filters, just click on the 

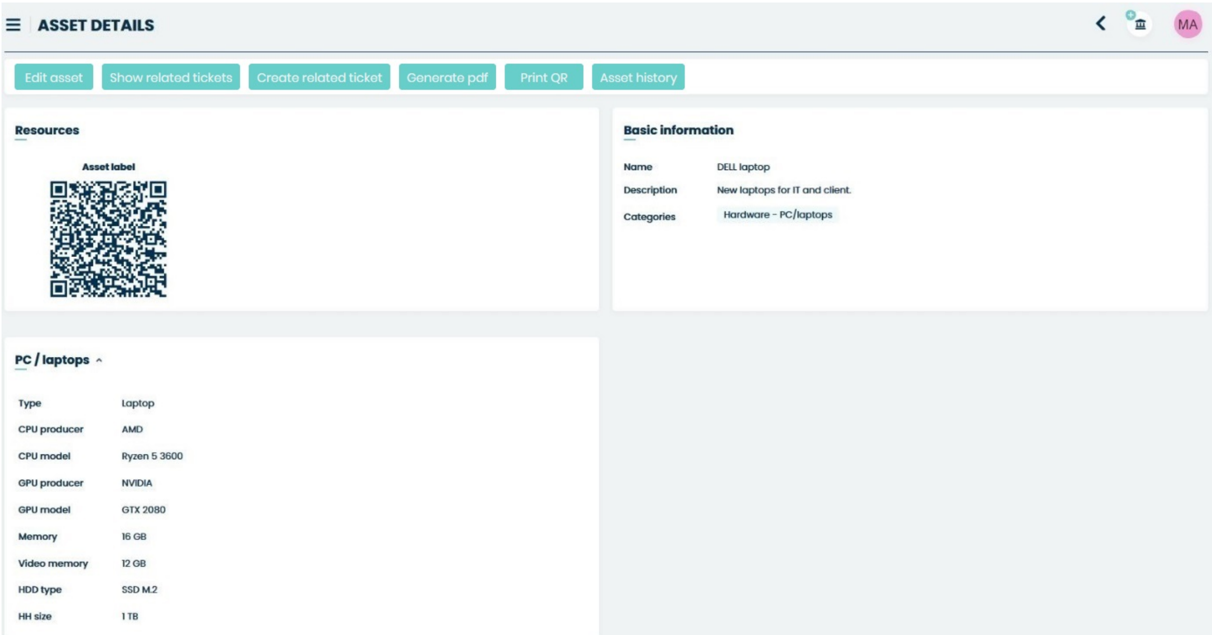
button. You can also remove any selections (Categories, Filters) by clicking on  or  button right next to each position.

The attribute columns can be added or removed in the section "Set column properties" on the right side by clicking on the  button. Once you do that you will see a small window, where you can select the desired information you want to see on the assets list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.



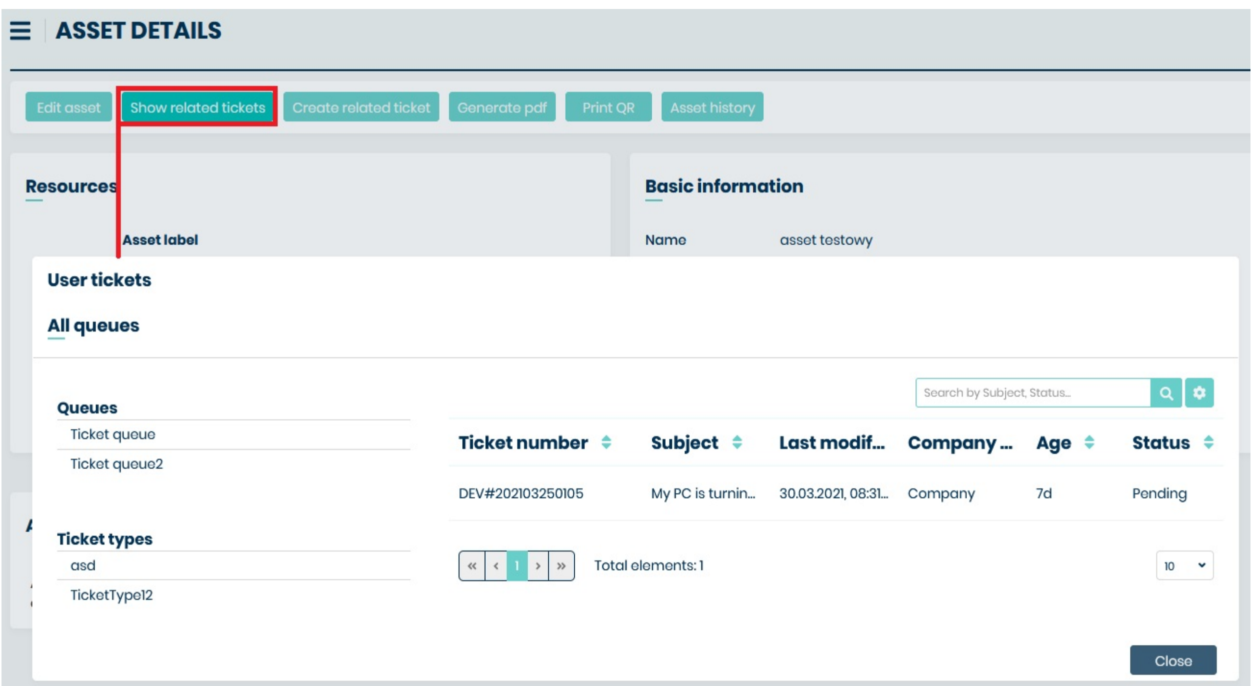
Also, you can look for specific assets by using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.

If you want to see the details of any asset, just click on it. It will open the Asset details view.

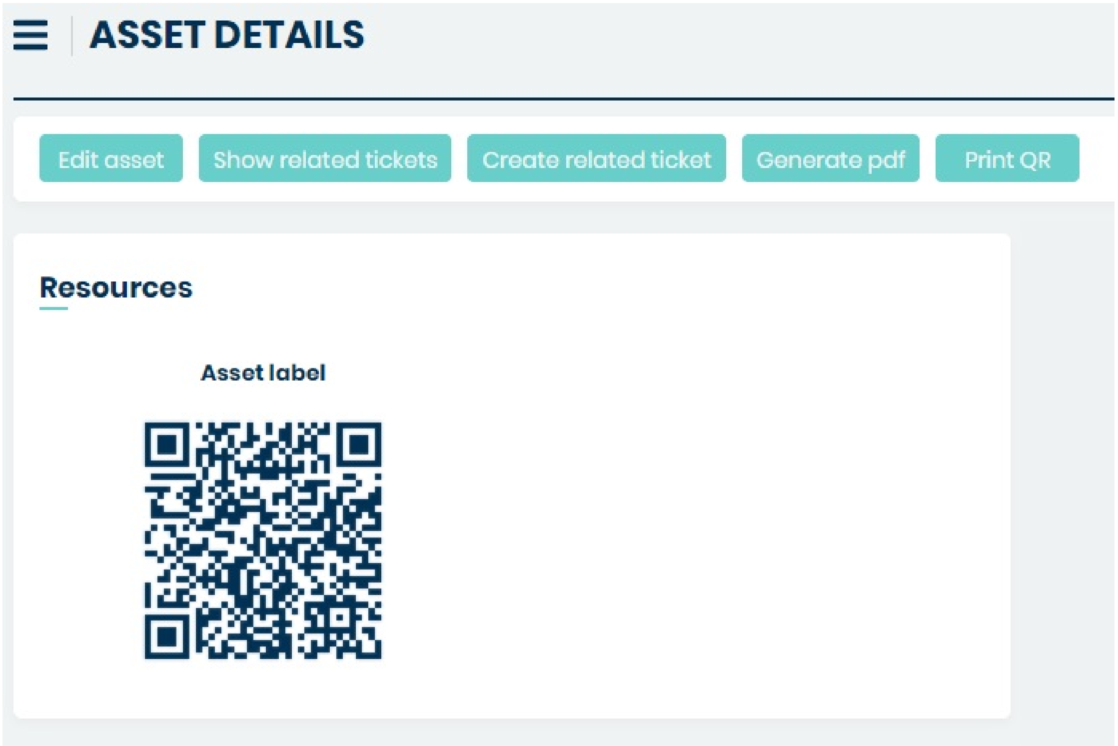


If the asset is related to any of the Tickets you will find it on the list once you click the 

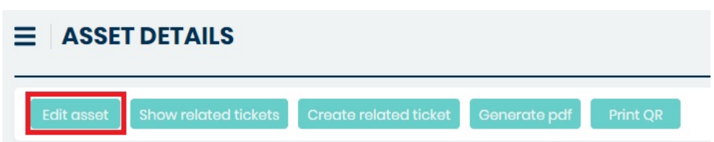
button.



Also, as you already noticed, inside the 'Edit asset' view there is a section which contains Asset's 'label' – a QR code which you can scan and you will be moved to the Asset Details of this particular Asset.

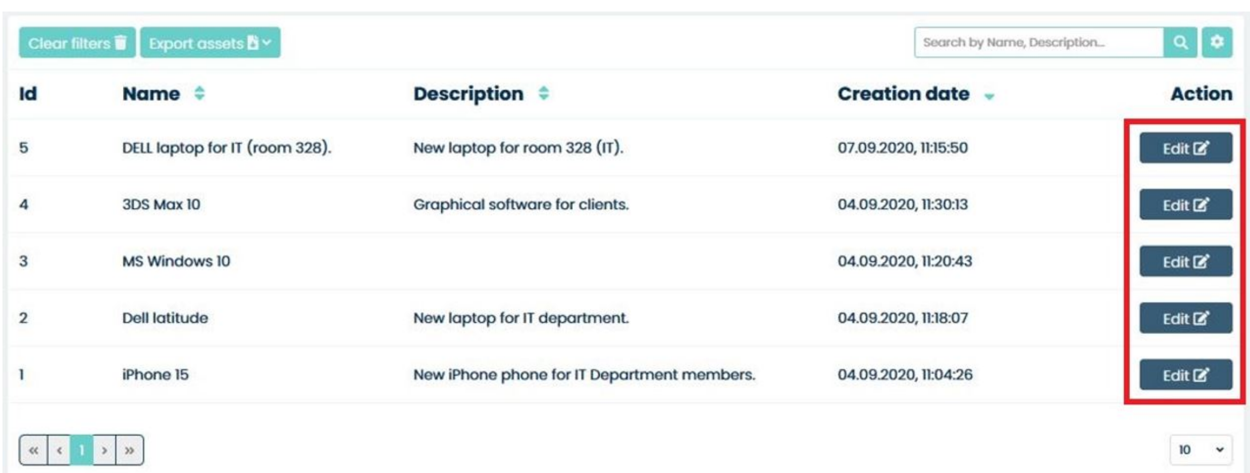


If on the other hand, you would like to make some changes in the already existing assets you can use the Edit button available in this place.

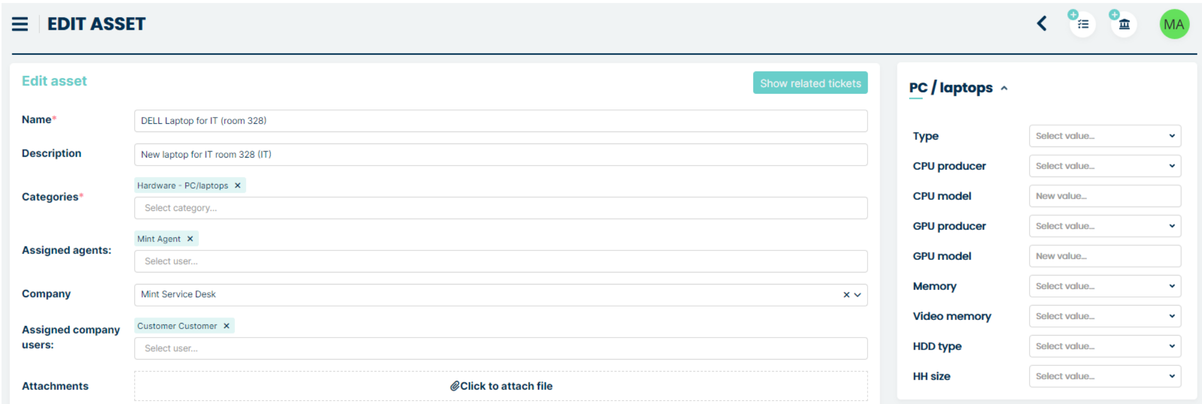


You can also use the 

button available on the right side of the Asset list on the main view.

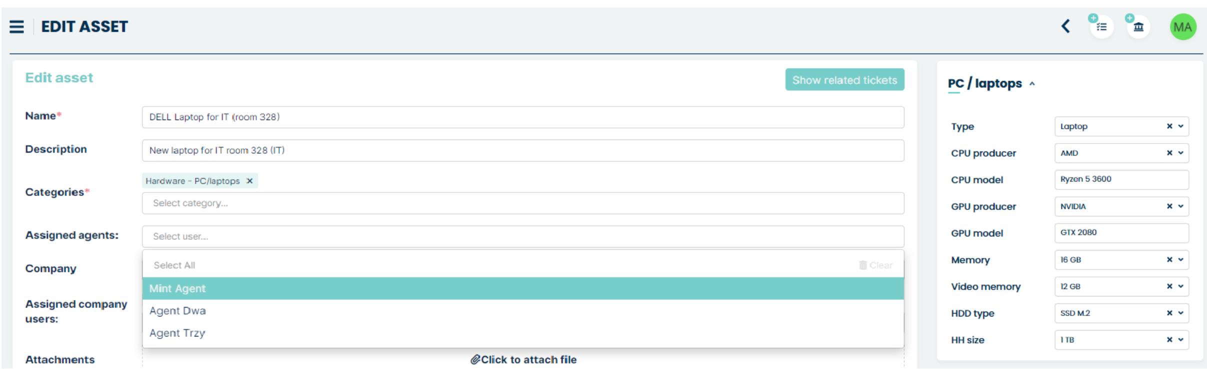


In both cases system will move you to an 'Edit Asset" screen which displays information and Asset's attributes.



As an Agent you can edit asset's information. However, the displayed assets and their attributes are related to the configuration and rights that administrator assigned to you.

Remember, that there might be more attributes for that asset in the system, but you will be able to see only those which Admin user wants to display. Additionally, Agent (just like the Admin) can change the list of assigned users by removing and old one or adding a totally new one (as shown for Mint Agent in the picture below). You can also assign Company as well as Company User.



The "Create related ticket" button allows you to create a ticket related to an asset. After pressing this button user will be redirected to create new ticket form.

The "Generate QR" button is used to generate a QR code and then download to disk.

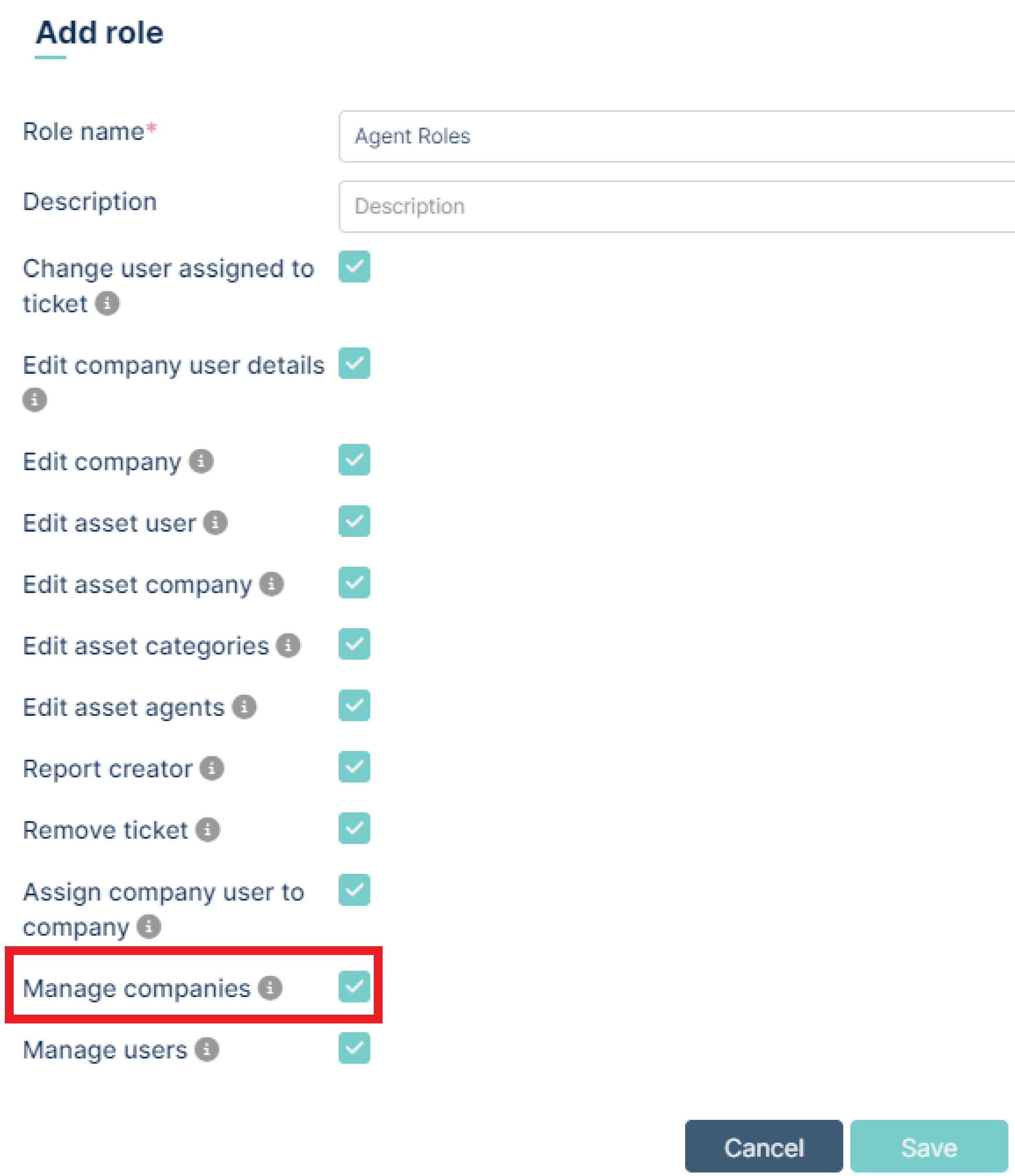
The "Print QR" button is used to print the QR code. When this button is pressed, the printer panel will be activated for printing.

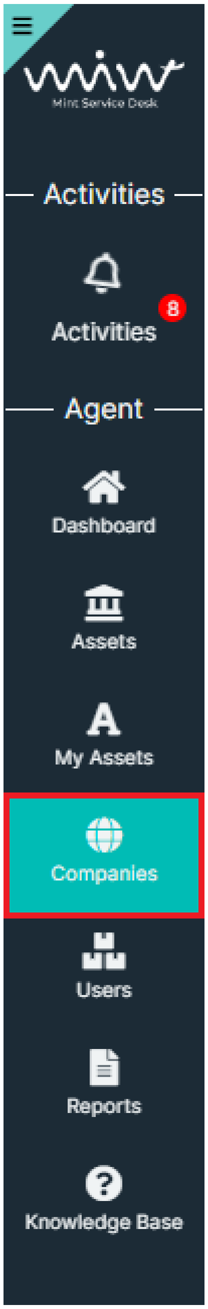
4.4.9 MY ASSETS

The only difference between this part and 'Assets' is that here you will only see the Assets that are only assigned to you. The rest (asset list, editing, preview, etc.) stays the same.

4.4.10 COMPANIES

At this point in the system, an agent can edit Companies just like an admin. For, this to be possible the agent role must have this option checked:

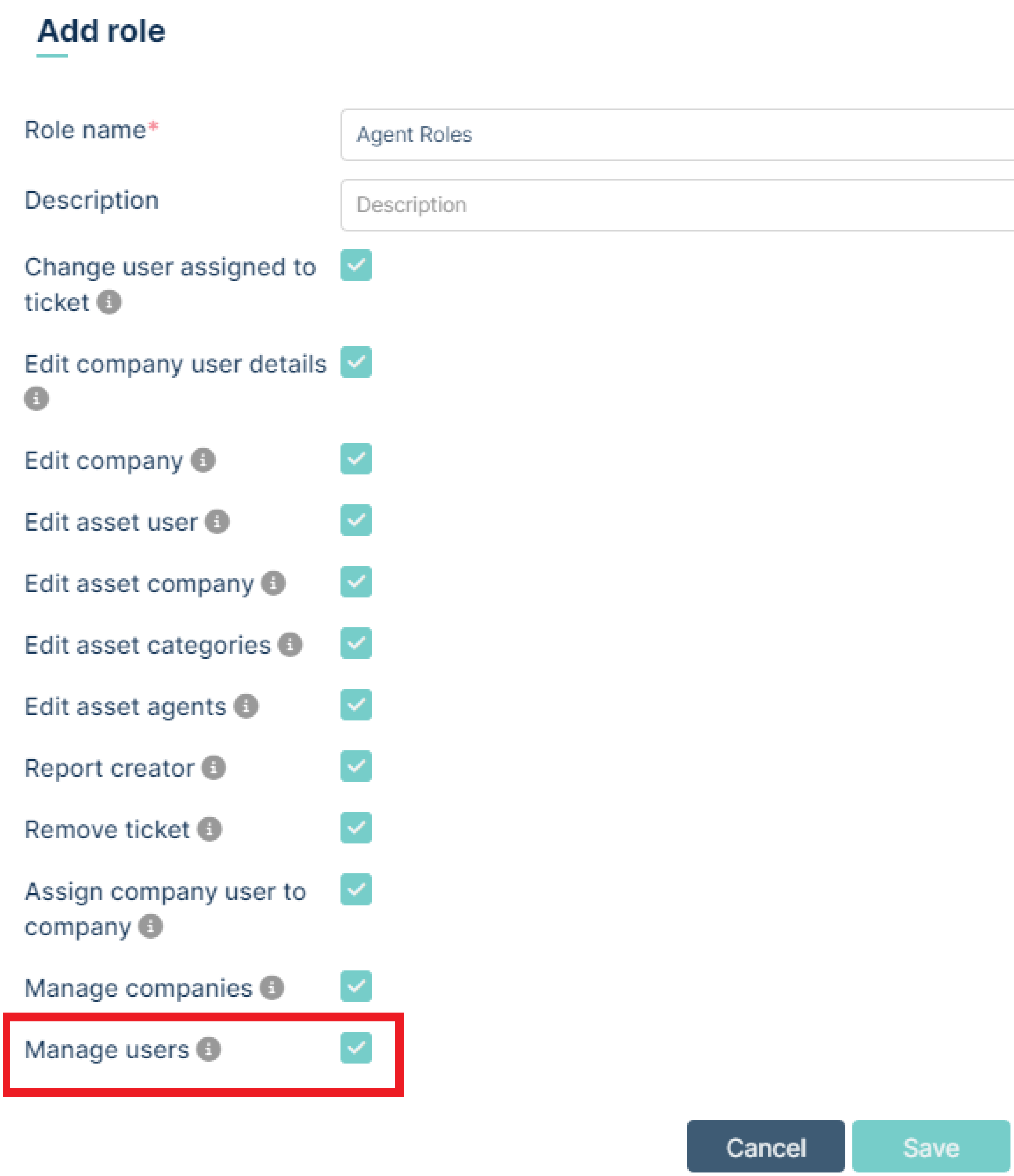

Add role
Role name*
Agent Roles
Description
Description
Change user assigned to ticket
Edit company user details
Edit company
Edit asset user
Edit asset company
Edit asset categories
Edit asset agents
Report creator
Remove ticket
Assign company user to company
Manage companies
Manage users
Cancel
Save

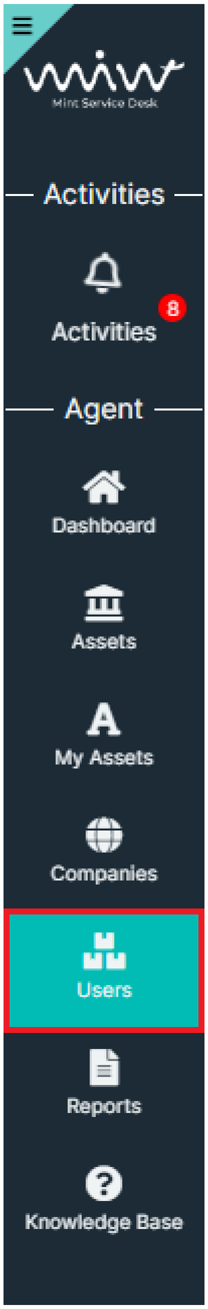


The capabilities of this site are outlined in the admin documentation.

4.4.11 USERS

At this point in the system, an agent can edit Company Users just like an admin. For, this to be possible the agent role must have this option checked:


Add role
Role name*
Agent Roles
Description
Description
Change user assigned to ticket
Edit company user details
Edit company
Edit asset user
Edit asset company
Edit asset categories
Edit asset agents
Report creator
Remove ticket
Assign company user to company
Manage companies
Manage users
Cancel
Save



The capabilities of this site are outlined in the admin documentation.

4.4.12 ACCESS GROUPS

This part has been described in admin documentation. To have acces to this module, Agent must have the "Manage users" role assigned by admin in agent roles (like in "Users" part above). An agent can manage Access Groups or only have view access to those assigned by the admin. This is determined by another role called "Manage Access Groups" in Users -> Roles. If this role is active, the agent has management rights equal to those of the admin.

4.4.13 REPORTS

BASICS

In this part of the MINT Service Desk system, Agent can create, download and email reports containing information about Tickets, Assets, Users, Contracts and SQL queries to the database. Agent can also share reports with other users (except Admin).

The process of creating and managing reports in the Mint Service Desk system includes the following steps:

1) Report configuration - Agent can define the conditions of the report, such as filters, data range, users who have access to the report and the format for saving the file (CSV, XLSX). Agent can also define the list of email recipients for the report. As soon as all the parameters are set, the report is saved in the system by Save button.

2) Report generation - Once the report configuration has been saved, Agent can generate the report. The status of the report is recorded in the system along with the date it was generated, allowing the user to track the history of the report.

3) View, download and send - Once successfully generated, the report is available for viewing in the system, for downloading in the selected file format and for sending to specified email recipients.

4) Setting the report schedule - Agent can configure a schedule for generating reports. Reports can be generated periodically according to specified dates or intervals (e.g. daily, weekly, monthly). It is also possible to automatically send generated reports to selected recipients.

The general description of the tabs can be found in the **Tab Description** section, while detailed information on creating a report is available in the **Creating Report** section. To learn more about creating schedules, visit the **Creating Schedule** section.

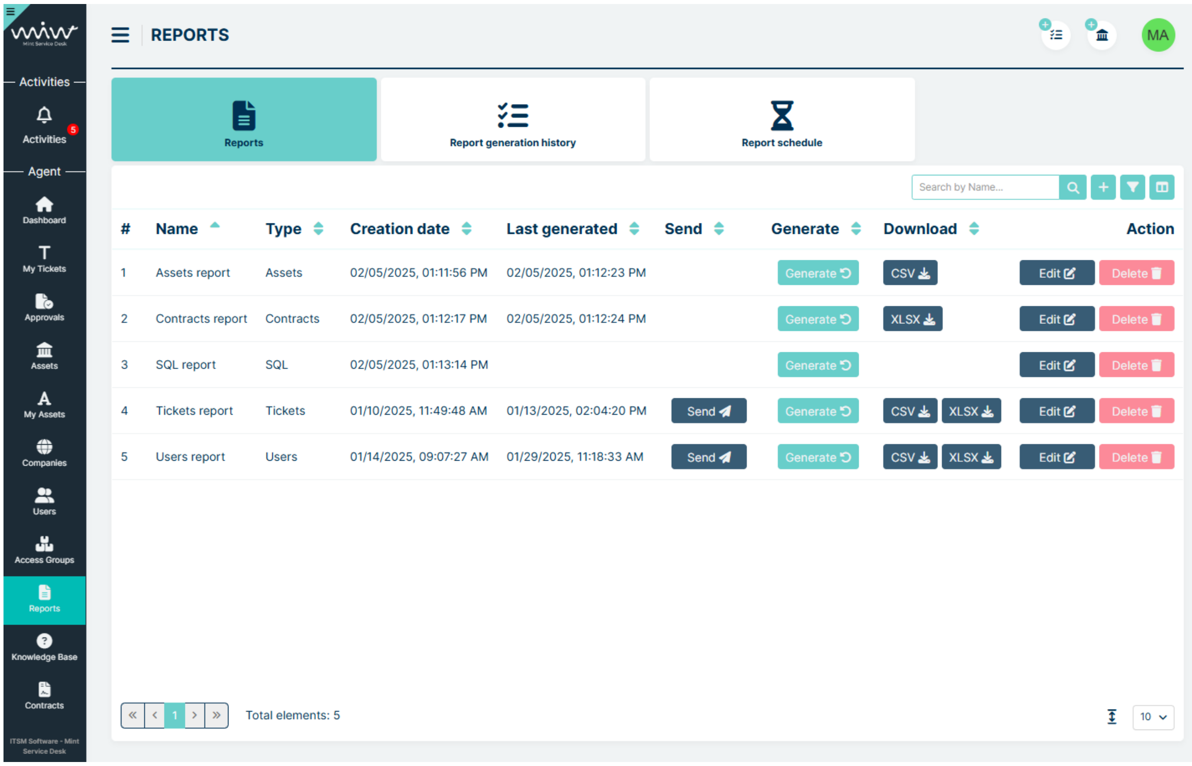
TAB DESCRIPTION

The main report screen is divided into three tabs:

- **Reports (default screen)** - Here we have a list of all saved and shared reports.
- **Report generation history** - Here we have a full history of how the reports were generated and whether they were generated successfully or with errors.
- **Report schedule** - Here we can create schedules for running selected reports and sending them to specified recipients.

REPORTS

The main screen displays a list of created reports. By default, the table displays columns such as Name, Type, Creation date, Last generated. There are also columns with action buttons: Send, Generate, Download (in CSV or XLSX format) and Actions (Edit and Delete).



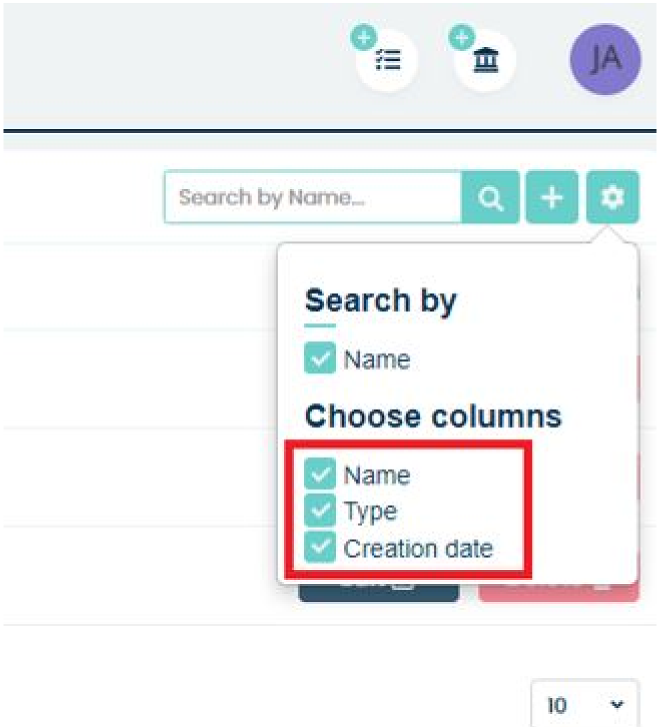
Let's briefly describe the buttons listed:

- **Send** - allows you to send the last generated report to the recipients defined in the report in the Recipients section (button is hidden if no email recipients are defined in the report configuration)
- **Generate** - used to generate a report based on the data contained in the configuration. Each click generates a new report and saves it in the history in the preview window.
- **CSV/XLSX** - buttons for downloading the report in the appropriate format (visibility of these buttons depends on the options selected in the Exports section of the report configuration)
- **Edit** - allows you to access the saved report configuration and make changes
- **Delete** - allows to delete the report configuration including all its history

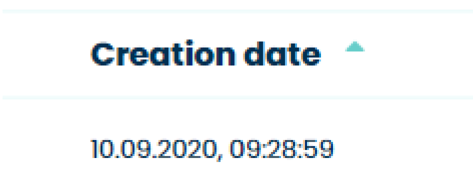
You can search for a specific topic by using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.

If you decide that you don't need some of the attribute columns you can remove them from the view. To do that simply click on the  button.

Once you do that you will see a small window, where you can select (or unselect) the desired information you want to see on the Reports list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.

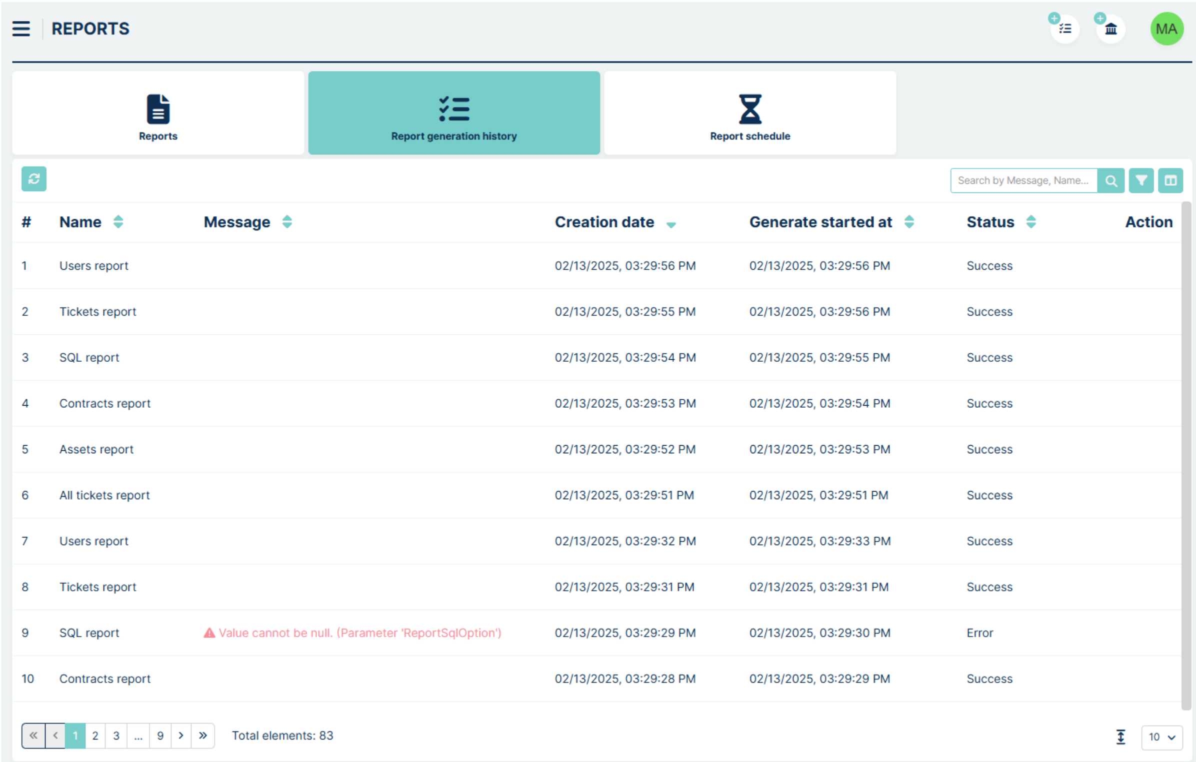


One last this is that you can sort the list of available Reports by the date they were created. Just click on the 'Creation Date' column's name. You will notice a small icon next to it. It represents whether the list is sorted by date: ascending ( )or descending( ).



REPORT GENERATION HISTORY

This tab allows you to track the generation history of each report. Reports that have started to be generated are placed in the generation queue. If many reports are being generated at the same time, some of them may enter a 'Waiting' status, waiting for the earlier ones to finish.

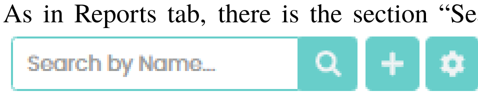


The table contains the following columns

- **Name** - the name of the generated report
- **Messages** - the column that indicates the contents of the error if the report generation failed
- **Creation Date** - the date and time when a particular report was added to the generation queue
- **Generate started at** - the date and time the report generation started
- **Status** - the current status
  - **Waiting** - generation waiting in queue (when multiple reports are generated at the same time)
  - **Success** - generation was successful
  - **Progress** - generation is still in progress
  - **Cancelled** - the report was in the process of being generated, but the user aborted the action with the Cancel button
  - **Error** - an error occurred and the report could not be generated
- **Action** - the column that displays the Cancel button when the report is being generated. Clicking it will cancel the task

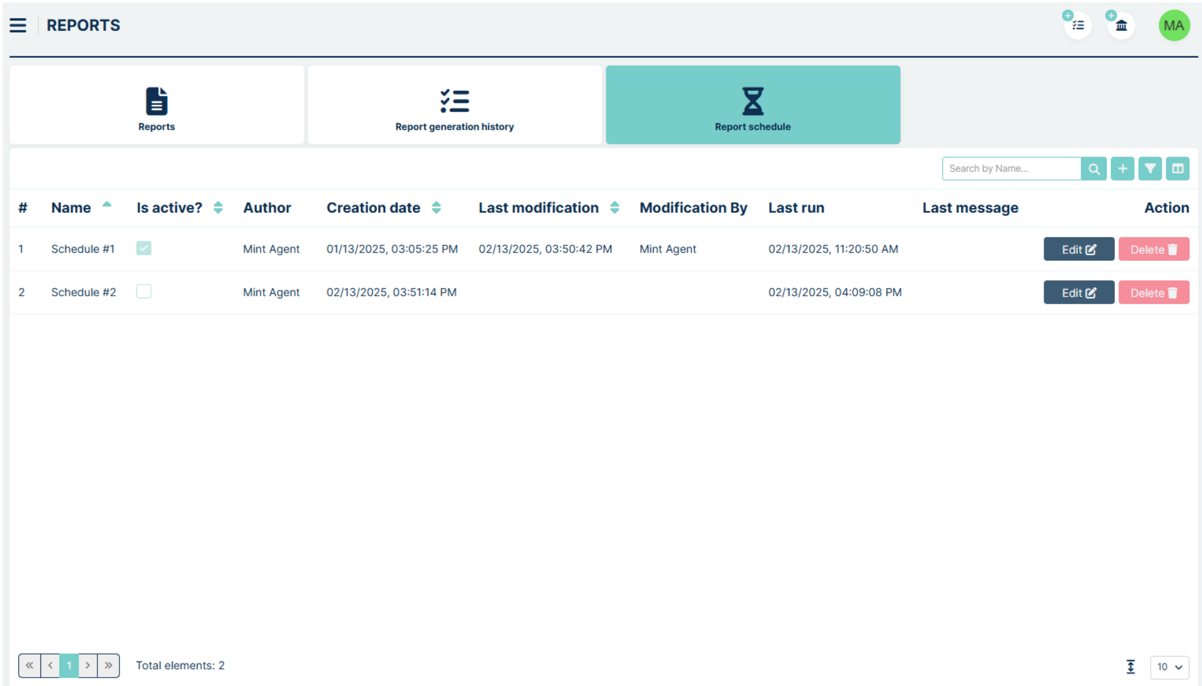
The tab does not refresh automatically - to do it, use the refresh button at the top left of the table.

As in Reports tab, there is the section "Search" field". How to use this section is described in the Reports tab.



REPORT SCHEDULE

This section allows you to create a schedule for the automatic generation of saved report configurations. You can also configure the system to send the report as an attachment to specified email addresses after it is generated, with a corresponding title and message body. The history of each email delivery is saved in each schedule. You can download historical reports or resend them manually.



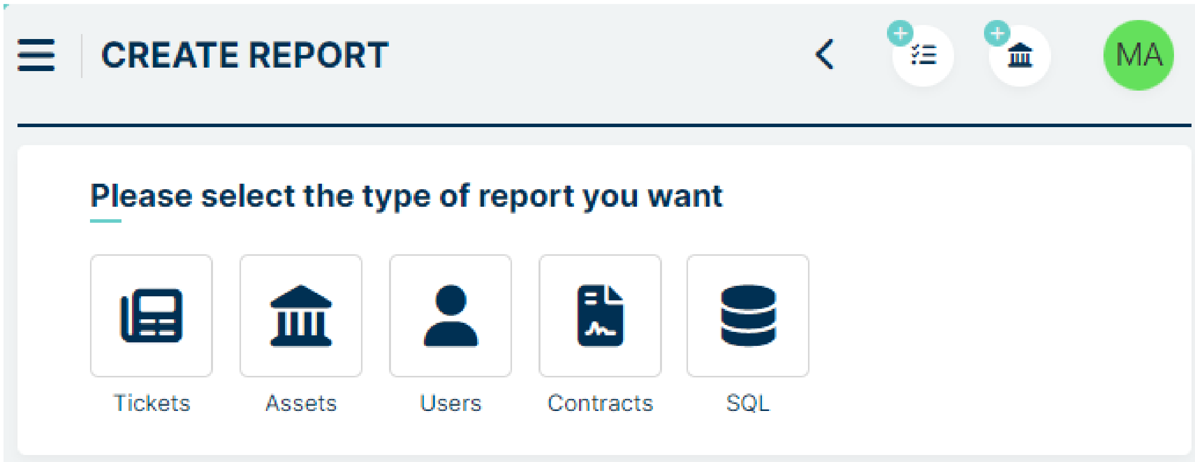
The main view is a table with the following columns:

- **Name** - The name given to the schedule.
- **Is active?** - Indicates whether the schedule is currently active. You can change this setting in the schedule's edit view.
- **Author** - The creator of the schedule.
- **Creation date** - The date when the schedule was created.
- **Last modification** - The date of the last change to the schedule.
- **Modification by** - The author of the last modification.
- **Last run** - The date when the report was last generated.
- **Last message** - The last error message related to sending or generating the report (if an error occurred).
- **Action** - Buttons to edit and delete the schedule.

CREATING REPORT

Now, if you want to create a completely new report first you need to click on the button.

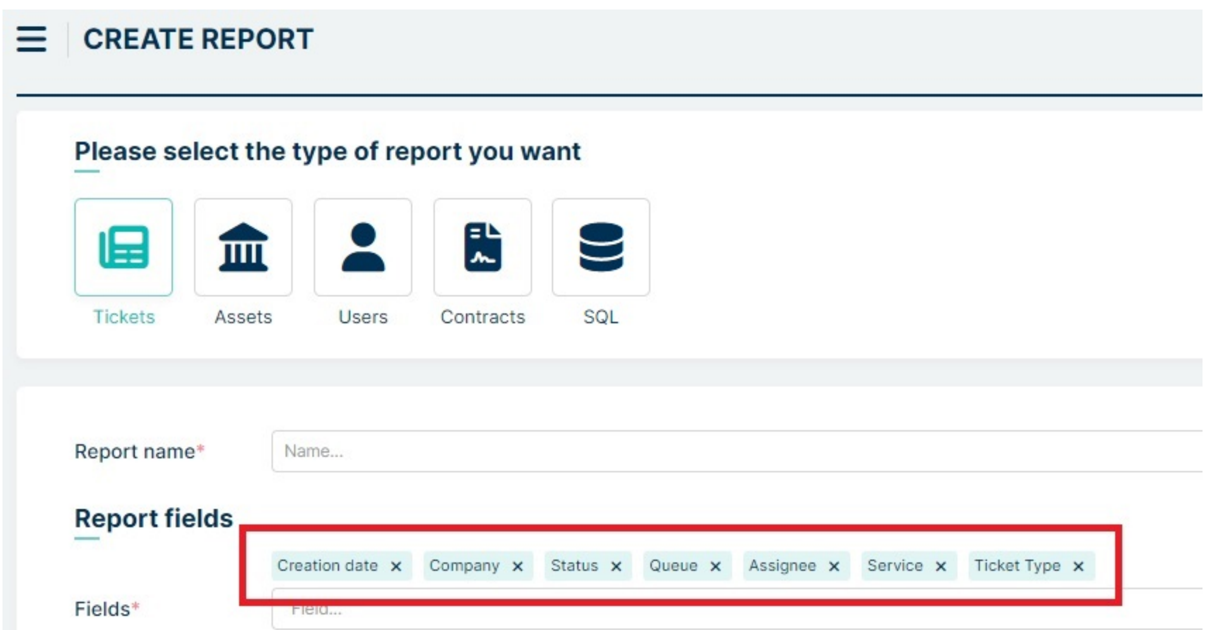
You will be moved to the new 'Create report' view.



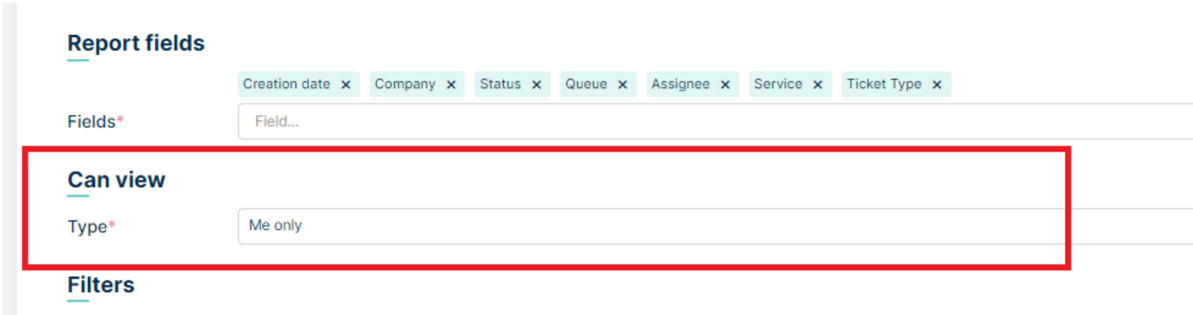
Right here the very first thing you need to do is to choose what kind of information the report will cover:

- Tickets
- Assets
- Users
- Contracts
- SQL

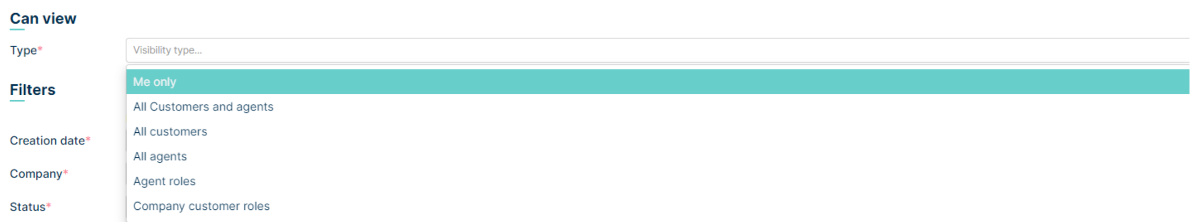
Depending on your choice you will have different fields and filters available while creating a report. Additionally, when you start making for example a report related to Tickets you will notice that some fields have already been added. It is a standard set which you can change very easily.



The next section is "Can view"



You can set here which Role will be able to view the report that you are creating

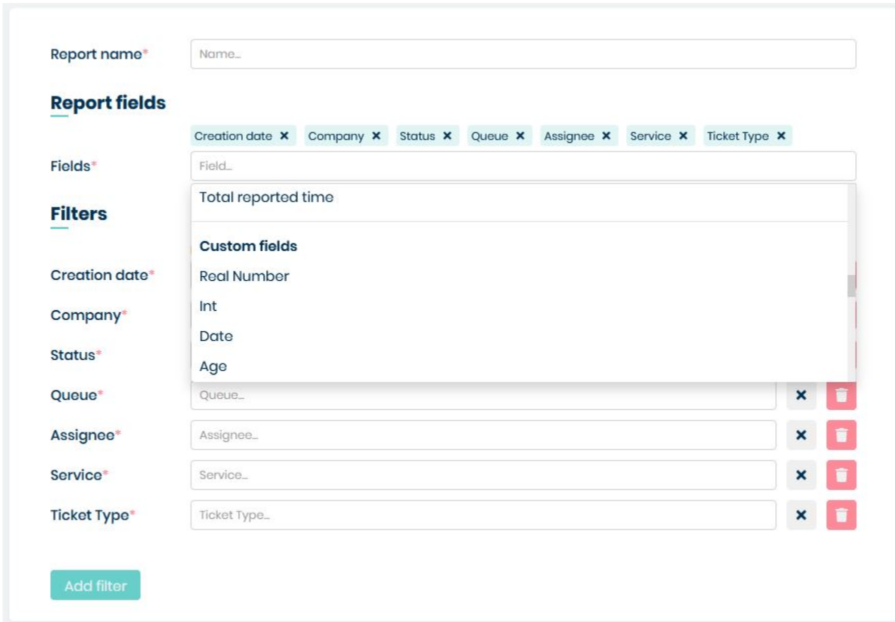


Right below them, you will also notice **Filters** section.

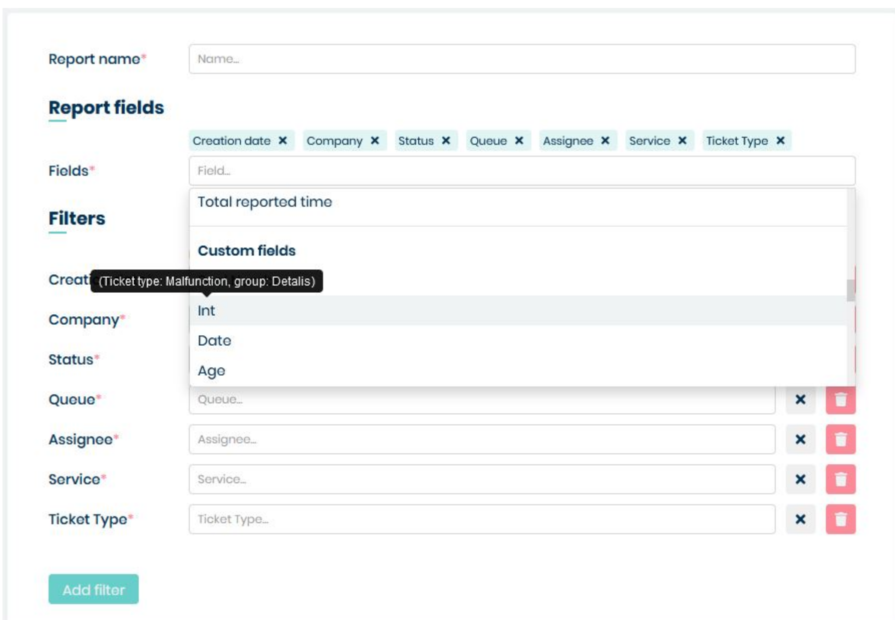
It's also a standard set of filters. You can leave them that way or make some changes. However, you need to remember that **filter cannot exist without the proper field**.

When you delete e.g. 'Ticket type' field you will notice that 'Ticket type' filter has also been deleted. On the other hand, you can add a field without the need for adding the same filter. Use **Add filter** button if You want to add new specific filter.

In the drop-down list, after the basic fields, there is a section with custom fields.

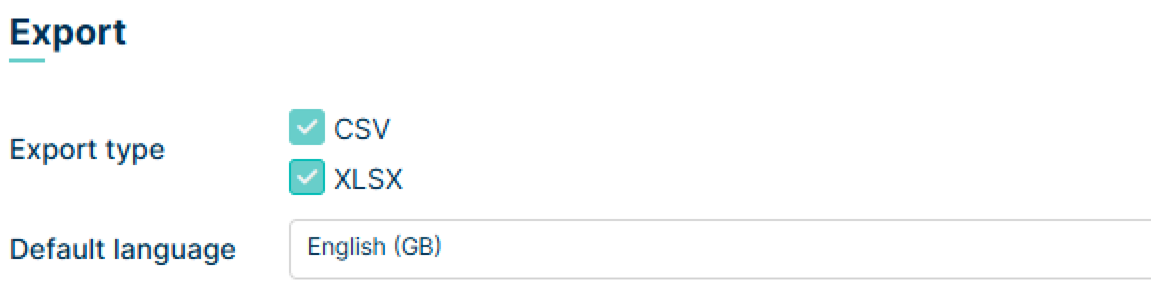


When you hover over the custom fields you can see what Ticket Type and Group it is from.



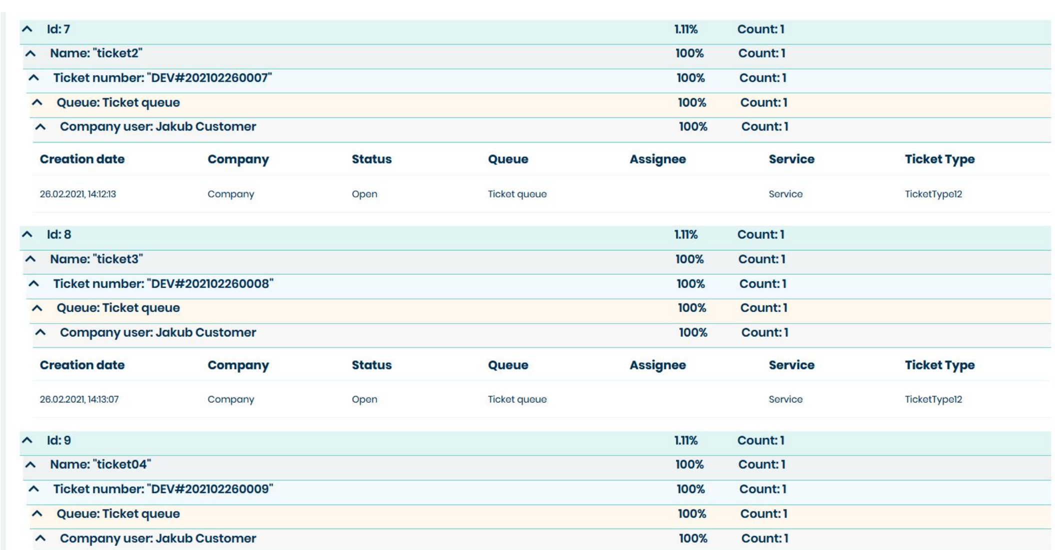
The same thing happens when Custom field is selected.

The next section is '**Export**'. If we want to be able to download the report to a file, we select the format we are interested in in the 'Export type' field and the language in the 'Default language' field.

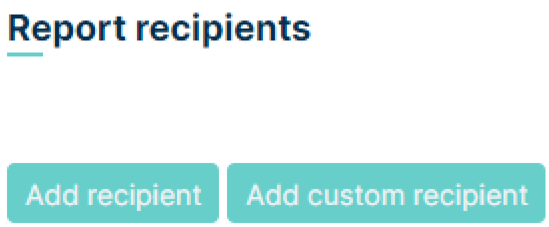


Below 'Export' there are '**Report groups**'. They are used to group tickets or assets according to your preferences. Currently you can add up to five items.

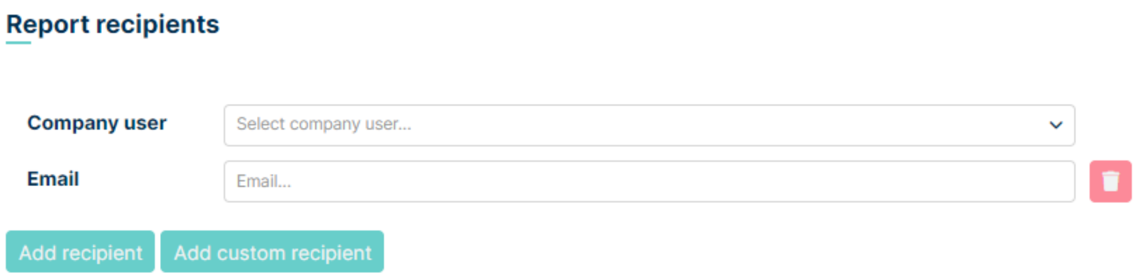
Example of a report using **Report groups**:



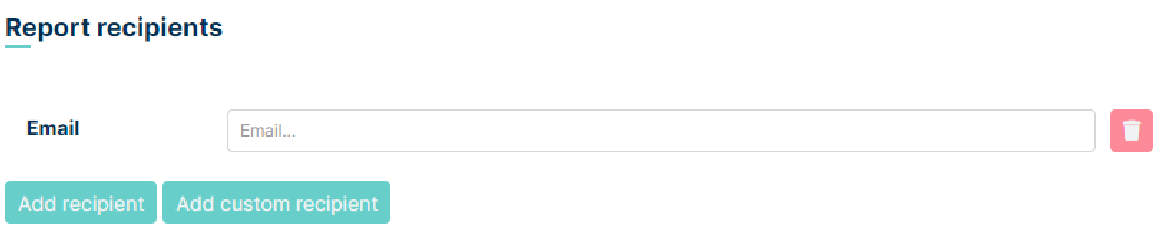
At the bottom is the '**Report recipients**' section, where you can set the recipients to whom you want send the report by e-mail.



You can click on  button and select from the list of saved recipients:



or you can click on  and add any email adress you want



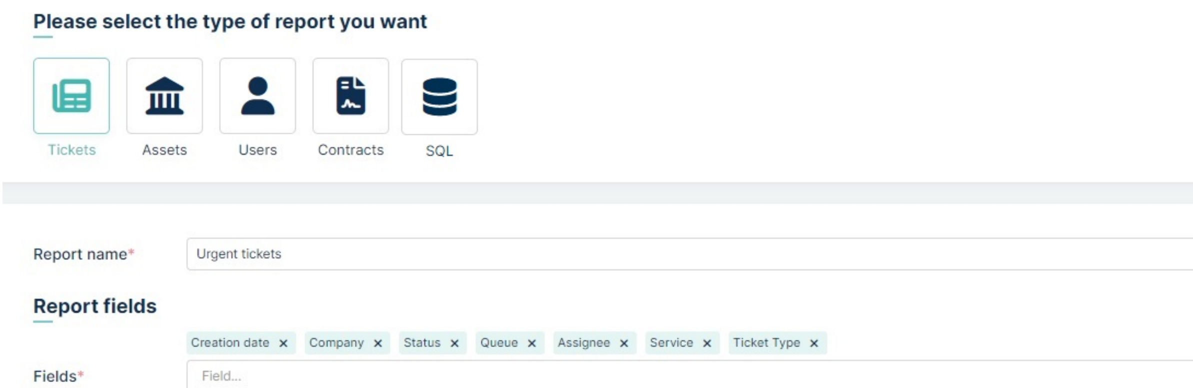
After filling in all the fields, click the  button. The report configuration is now ready for generating a new report.

Let’s create an example report for all of the tickets:

- assigned to ‘Mint Agent’
- created within the current week,
- having ‘In progress’ status,
- owned (created) by ‘MINT Customer’ user.

In the ‘Please select the type of report you want’.

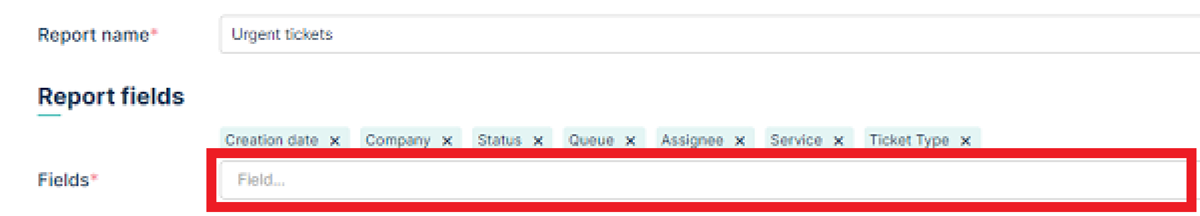
Now in the lower part of the view, you need to name your report (‘Name’) e.g. “Urgent Tickets”. Then, in the ‘Fields’ part, you need to select what information will be visible in the report (columns). You can either leave the default settings or make some changes.



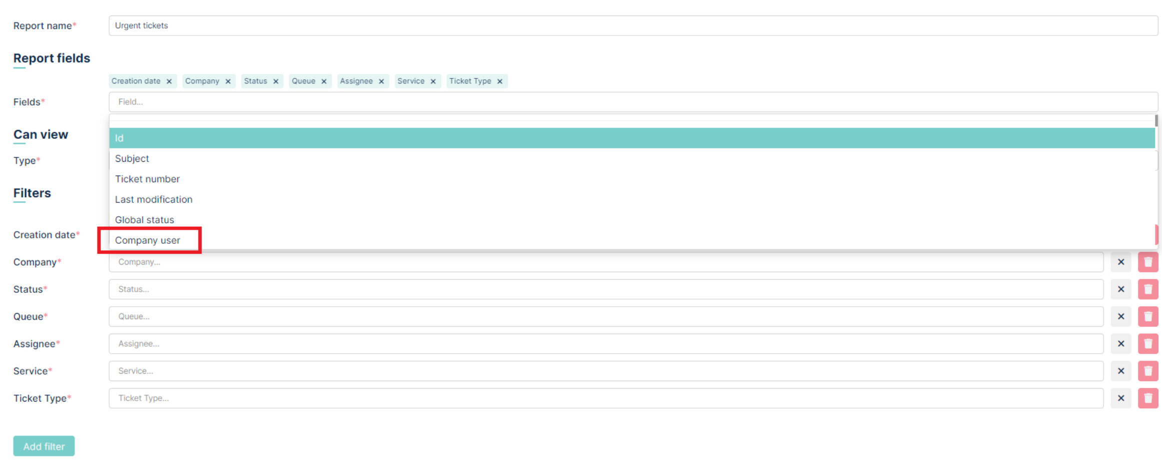
To remove any field simply click ‘X’ next to its name. Let’s remove ‘Ticket type’.

You will notice that the ‘Ticket type’ filter has also been removed. Now we need to add a new Field and Filter to cover the last condition “*owned (created) by ‘MINT Customer’ user*”.

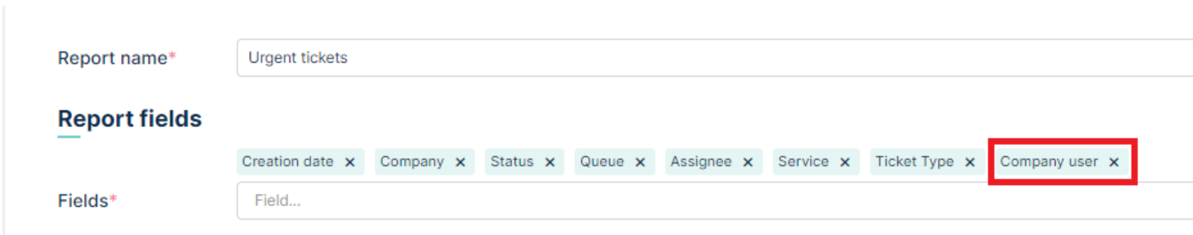
To add a new field click on the field located below.



Once you do that you will see a list of available fields. You can add as many as you want until there are still some of them available. Let’s add only one: ‘Company user’.

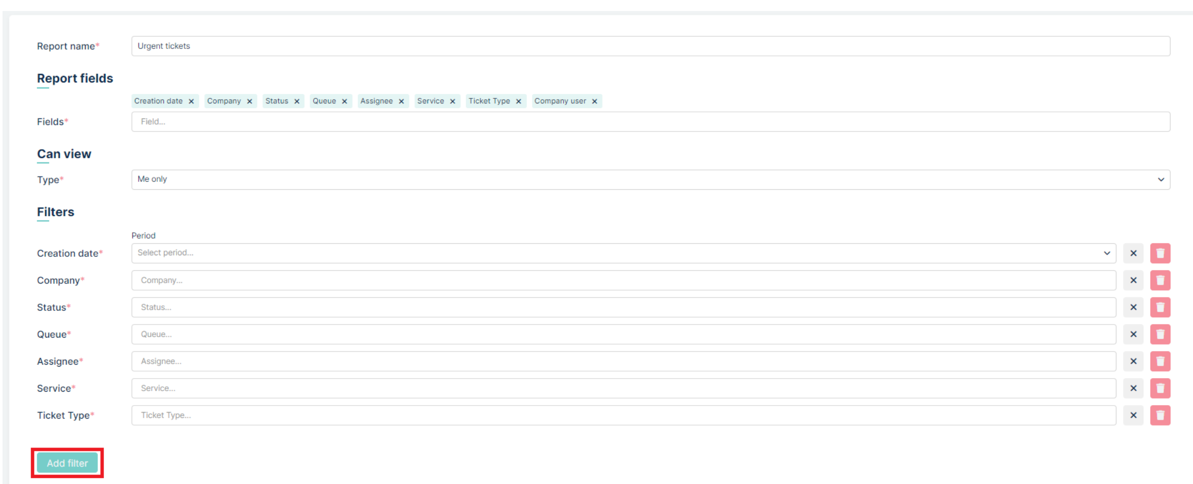


The moment you chose it you will see a new position in the ‘Fields’ part.

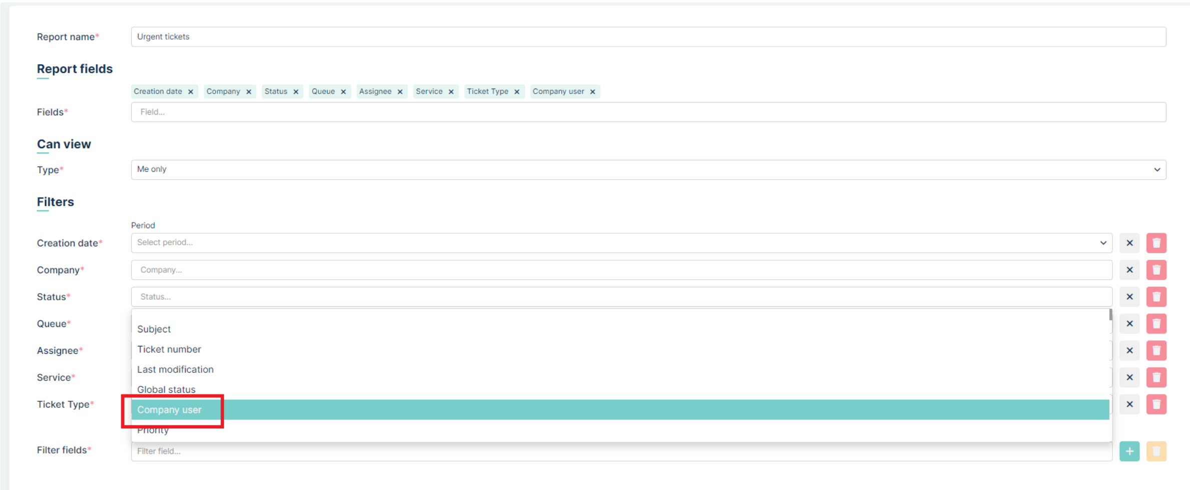


Now let’s add a filter for company users. Click on the 

located below the list of selected filters.



From the newly created ‘Filter fields’ list select ‘Company user’.



Now click  button to add this filter (if you want to cancel just click on the button).

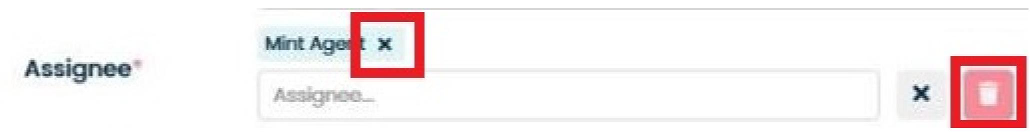
The moment you do it the filter will be added in the list of filters.

Let's go back to the requirements = Tickets:

- assigned to 'Mint Agent'
- created within the current week,
- having 'In progress' status,
- owned (created) by 'MINT Customer' user.

Now we only need to select the right options from available filters like on the following screen.

If you select the wrong option you can always delete it either by clicking 'X' next to its name or click on the 'X' button on the right side of the filter.



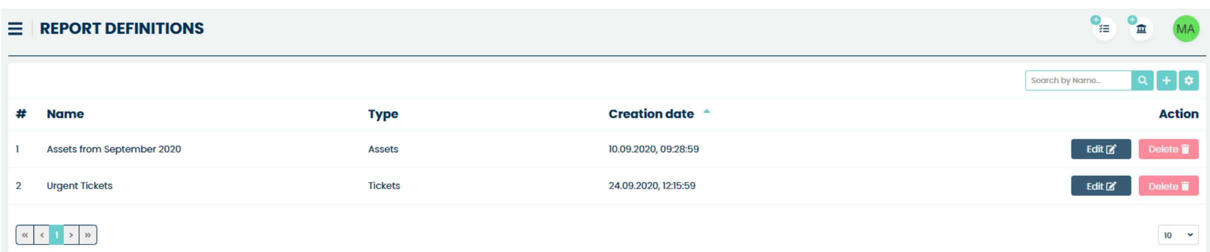
The first method is used for deleting single position, while the second one will delete all of the selected options for the filter.

If you try now to save the Report ('Save' button) you will notice that you cannot do it. Unused filters will be marked with a red frame.

Delete those filters you don't want to use by clicking  button next to each of them.

Click 

button to create the report. Once you do that you will see a new position on the list in the 'Report definitions' view.

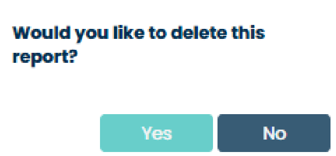


If you want to change anything in the already created report simply click the 

button and you will be moved to the 'Edit report' view.

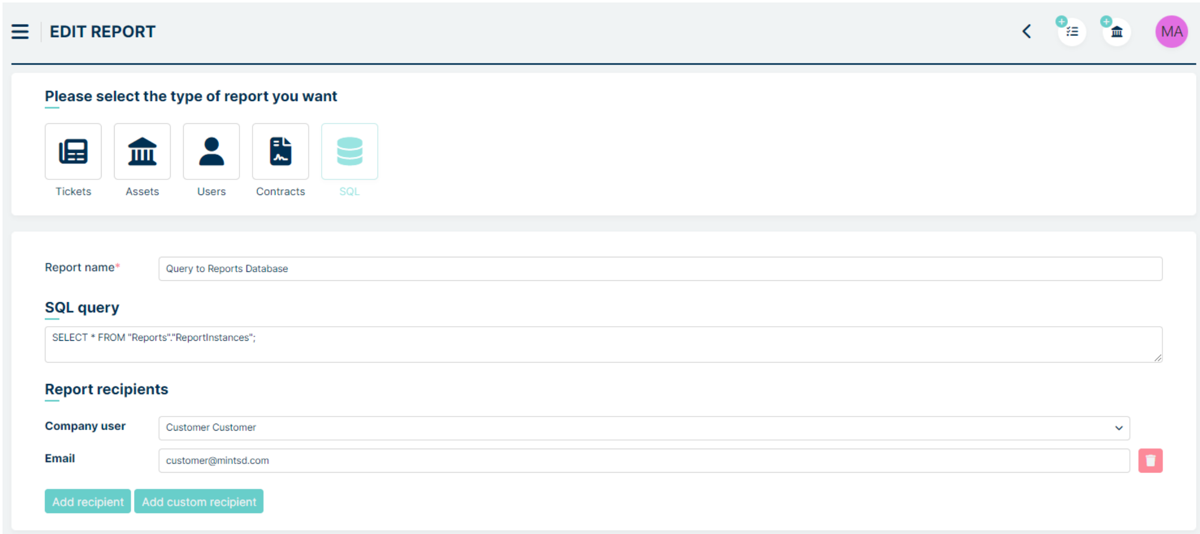
If, on the other hand, you would like to delete the report from the system you can do it by clicking the 

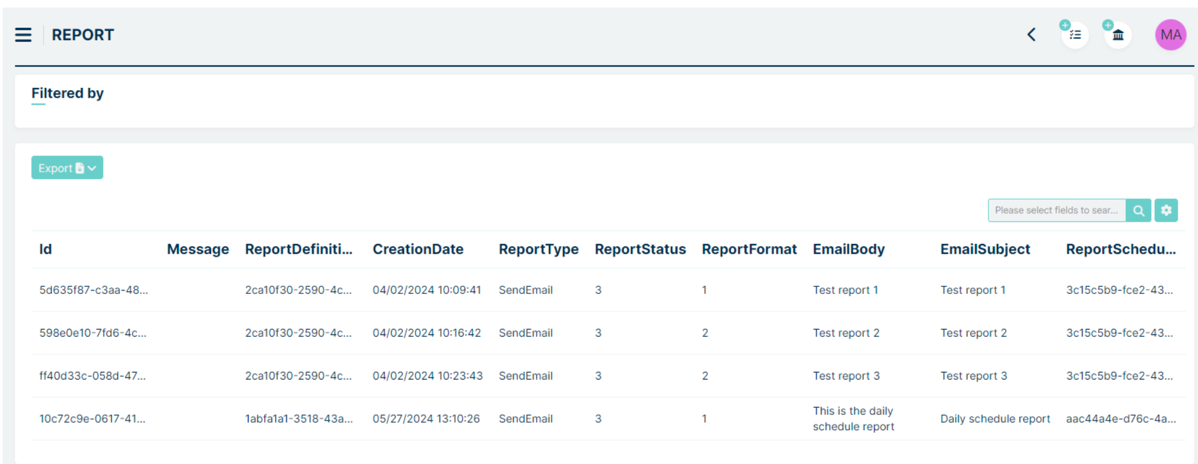
button and answering 'Yes' when the system asks for confirming your choice.



SQL Reports

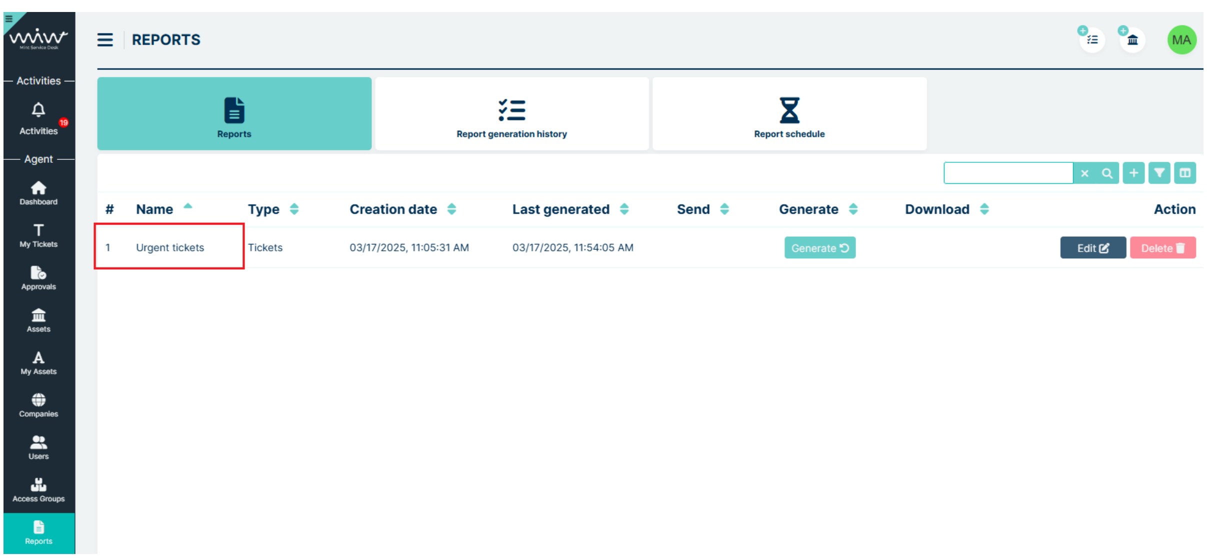
SQL Reports allows you to create a SQL query directly into the Reports module database. In response, Mint Service Desk will display the available records in the selected table. We can also send the generated report to the selected email address.



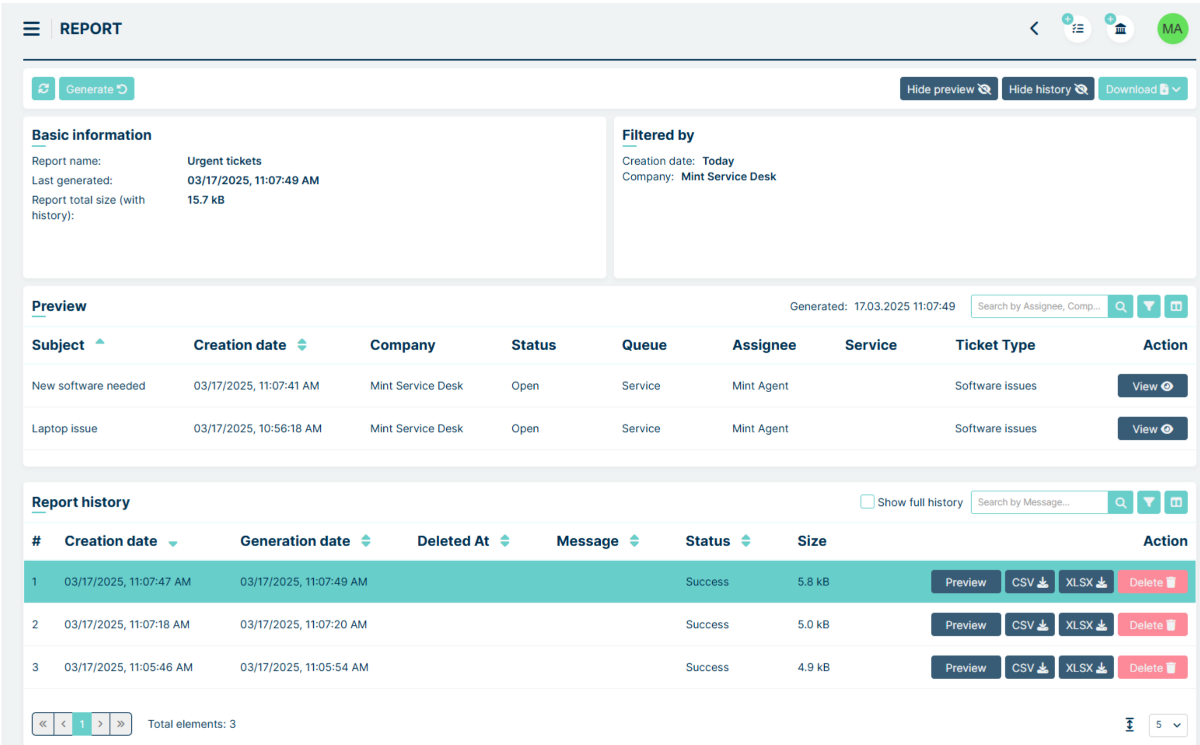


REPORT DETAILS

Let's describe the report preview using an example of an Tickets Report. To access a specific report, click on its name.



After clicking, a new page opens.



Below is a detailed description of all sections. At the very top, there is a bar with various buttons.

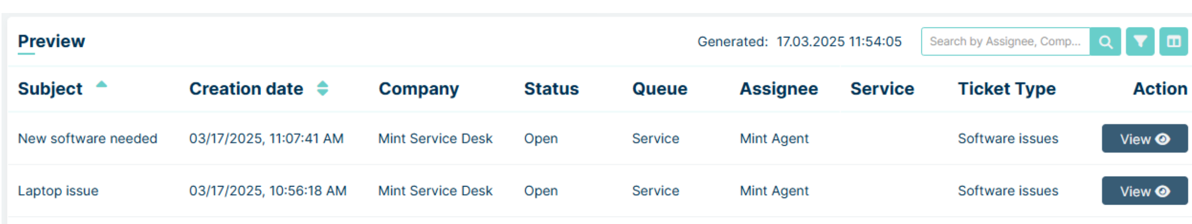
On the left side, you will find:

- **Refresh** – used to refresh the view, e.g., after generating a report using the Generate button.
- **Generate** – starts the generation of a new report. Once the process is complete, the report appears in the Report History section and its preview is displayed in the Preview section.

On the right side, you will find:

- **Hide/Show Preview** – used to toggle the visibility of the Preview section.
- **Hide History** – used to toggle the visibility of the Report History section.
- **Download** – opens a dropdown menu that allows downloading the latest generated report as a CSV or XLSX file, depending on the selected format in the report configuration (If no format is selected in the configuration, the Download button is unavailable).

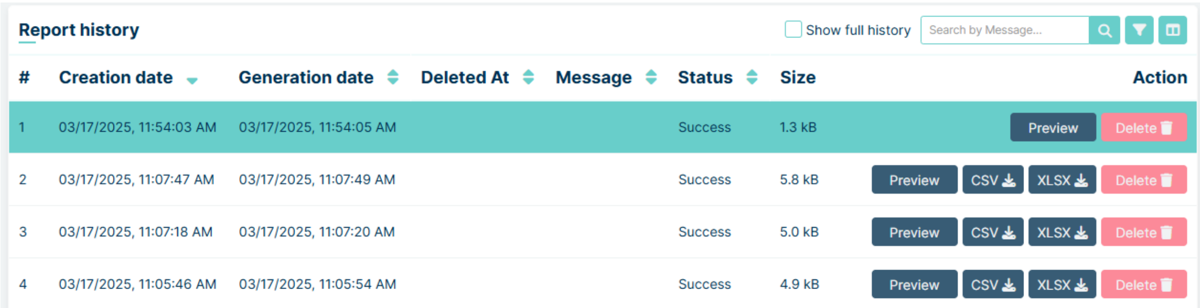
The next section is **Preview** (initially open).



Here you can see a preview of the report selected from the Report History section. The number and types of columns displayed in the preview correspond to the columns selected in the report configuration. The last column is Action, and within it, there is a **View** button that allows you to directly access the specific incident. At the top right you will find info about generation date, You can also search for specific values using the search bar.

The number of rows displayed is dependent on the settings in **Admin** → **Settings** → **General** → **Reports** under the **Maximum number of rows in report preview** field.

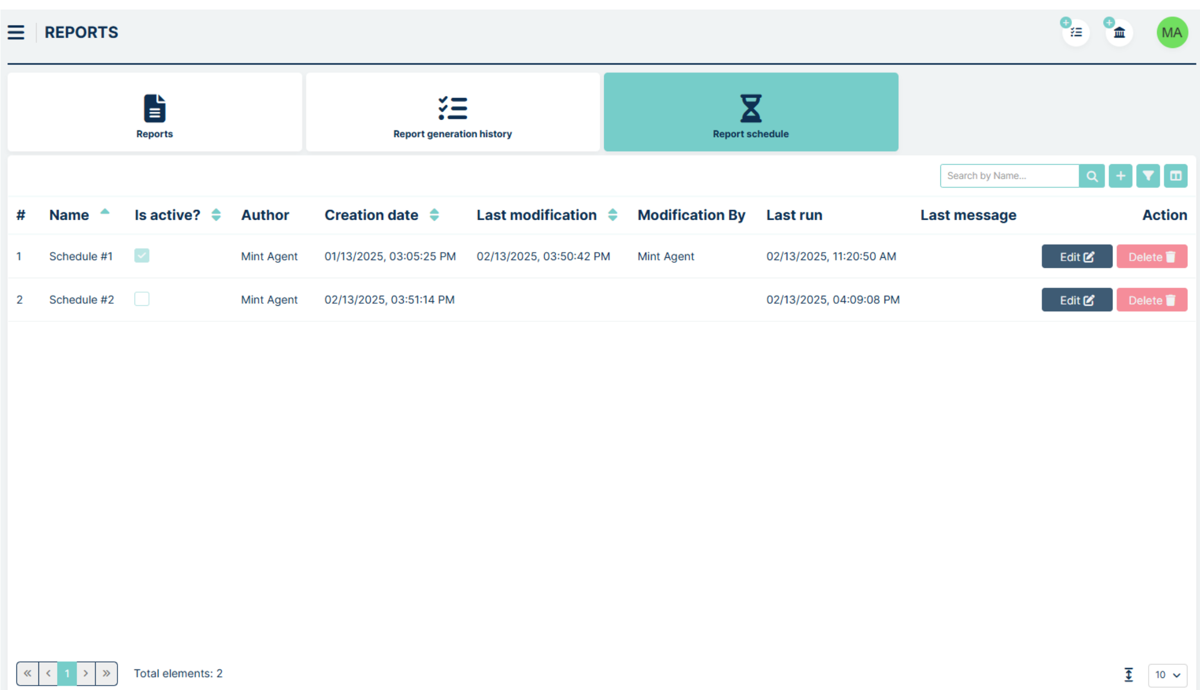
At the bottom, there is the **Report History** section.



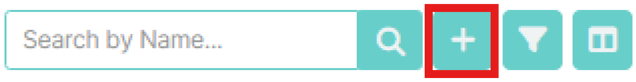
Here, you can see all the generated reports. By default, only successfully generated reports are displayed here. By clicking the **Show full history** checkbox, entries with statuses other than Success, such as Cancelled or Error, will also be shown. Clicking the **Preview** button will show the results of each historical report in **Preview** section. You can also **download** the reports as a **CSV** or **XLSX** file, depending on the selected format in the report configuration (If no format is selected in the configuration, these buttons are unavailable).

CREATING SCHEDULE

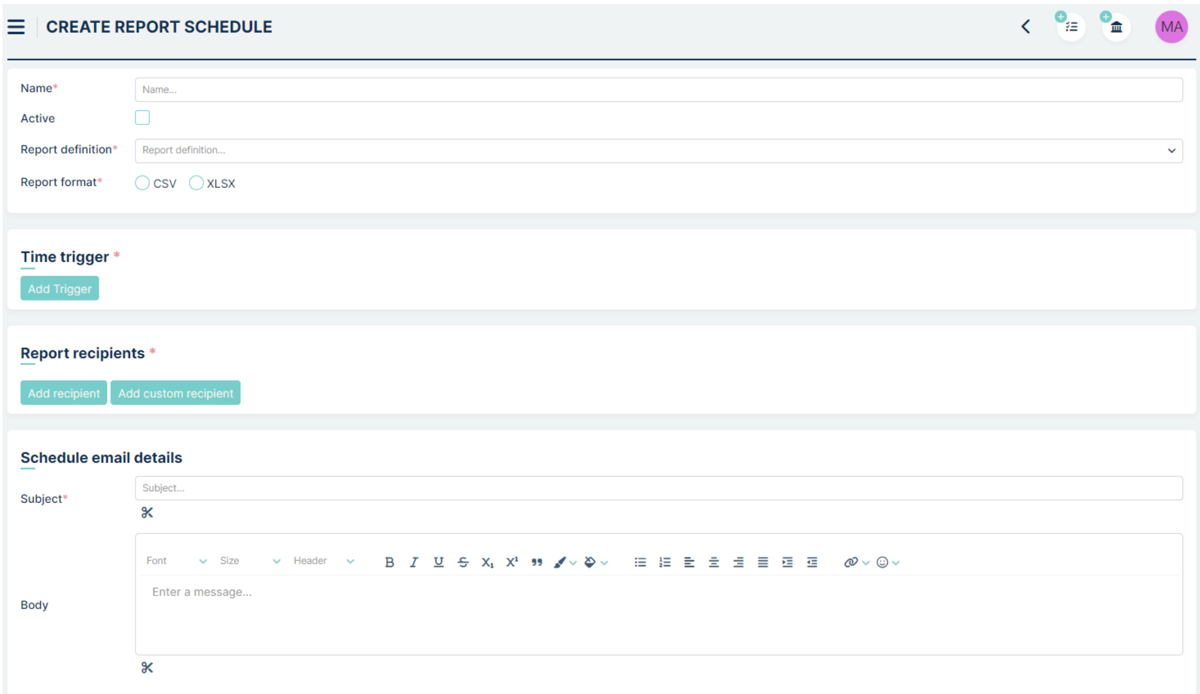
In **Report Schedule** tab we have a list of saved schedules for sending selected reports. From this point, we can also add new schedules.



To add a new schedule, press the button like below.



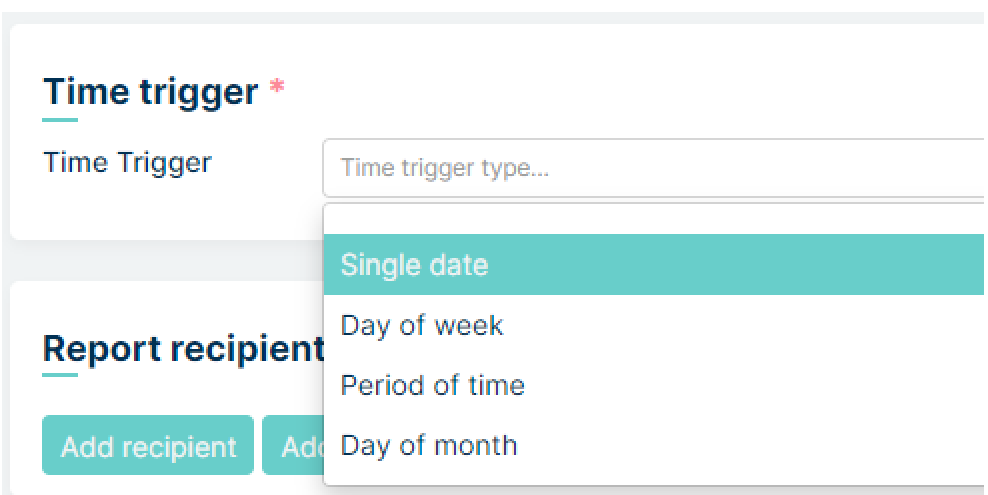
You will be moved to the new 'Create report schedule' view.



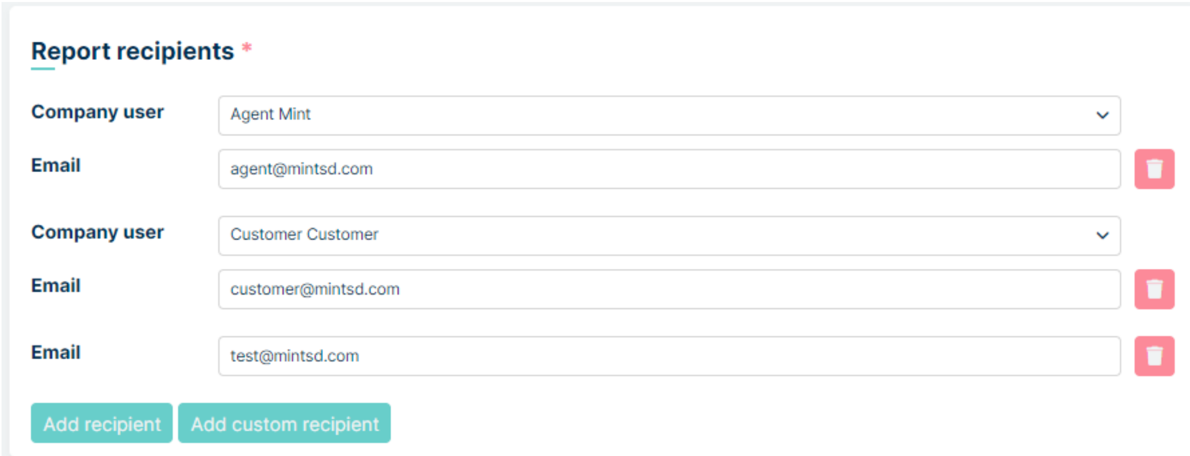
To create a schedule for a selected report, you need to fill in the following fields:

- **Name** - This will be the name of your schedule in the system.
- **Checkbox "Active"** - This determines whether the schedule is active or not.
- **Report definition** - Here we select (from a dropdown list) the prepared and shared reports from the "Report definition" tab. We can choose one report per schedule.
- **Report format** - you can choose between .CSV and .XLSX format

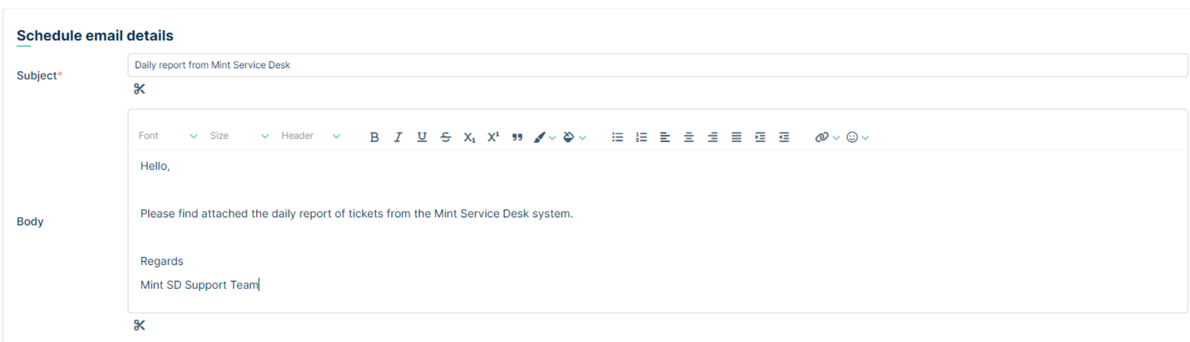
In the **Time trigger** section, we choose the frequency at which the reports will be sent to the recipients.



In the **Report recipients** section, we set the email recipients of our report. We can choose recipients registered in Mint Service Desk ("Add recipient" button) or type email manually ("Add custom recipient" button). We can add one or multiple recipients.



The last part is **Schedule email details** - the email template (subject and body) that the recipients of the scheduled report will receive.

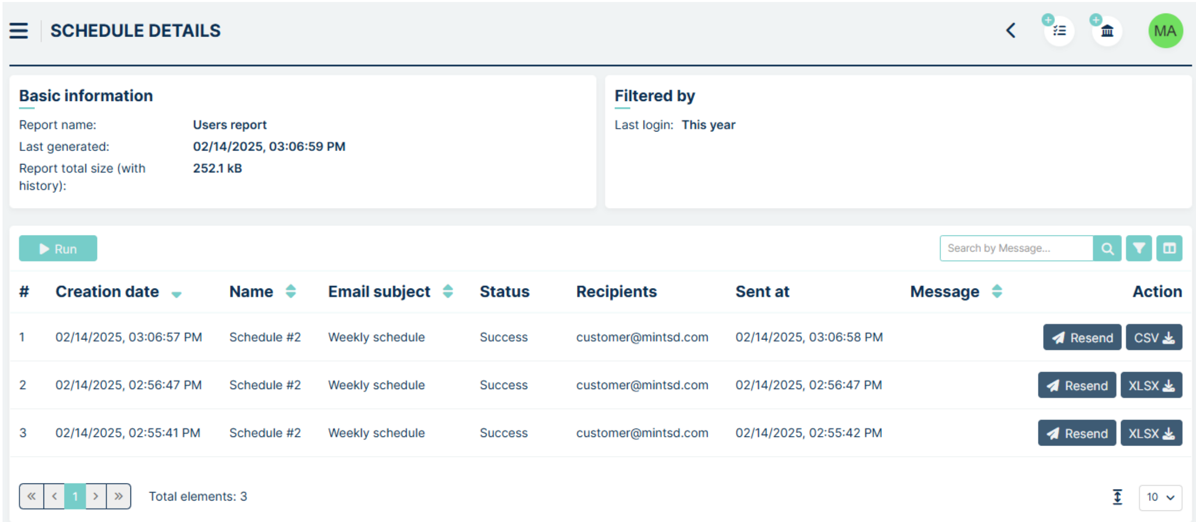


After filling all necessary fields press 

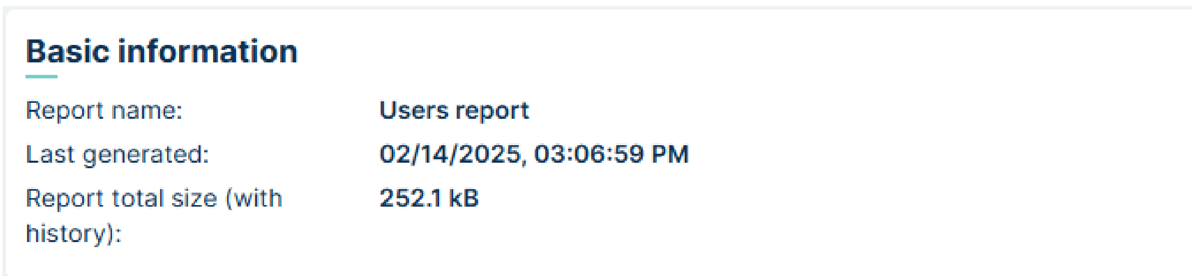
in lower right part of screen to save your report schedule.

SCHEDULE DETAILS

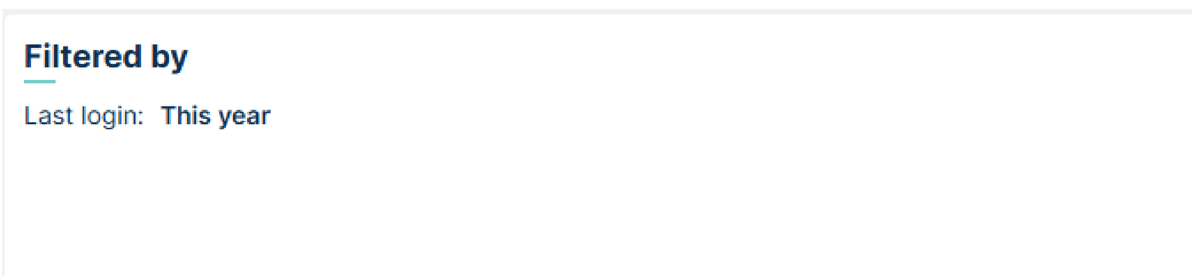
After clicking on the name of a specific schedule, a page with details is displayed.



The top left section contains basic information, such as the report name, last generation date, and size.



The top right section displays the report filters.



If no filters were used in the report, the Filters field is hidden.

The main part of the schedule details is a table containing the generated reports. These can be reports that are only generated and saved, as well as reports that are additionally sent to the email addresses specified in the configuration.

The top left corner of the table contains  button, which allows you to manually generate or send the report, regardless of the date set in the configuration. The top right corner contains the Search by section with buttons similar to those in the previously described tables.

The table contains the following columns:

- **Creation date** - the date when the report was generated by the schedule.
- **Name** - the name of the report (the name may change depending on the report configuration currently attached to the schedule).
- **Email subject** - the subject of the sent email message.

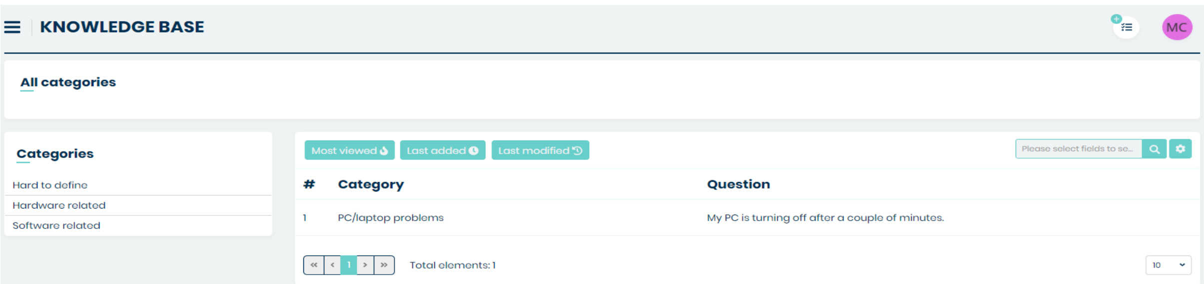
- **Status** - the status of the report.
- **Recipients** - the email recipients specified in the schedule configuration.
- **Sent at** - the date when the email was sent.
- **Message** - the error message, if the report generation was unsuccessful.
- **Action** - this section contains the Resend button to resend the email (if sending is enabled in the schedule configuration), and the XLSX or CSV button to download the report (available depending on the format selected in the schedule configuration).

4.4.14 KNOWLEDGE BASE

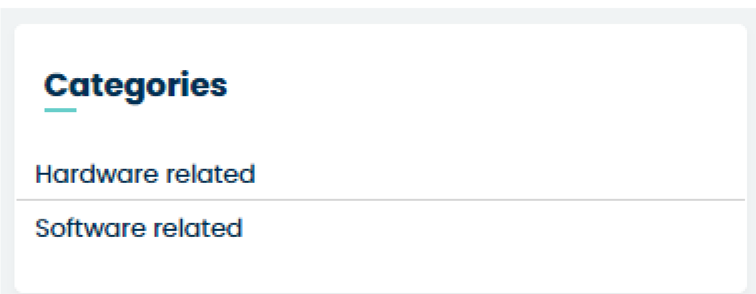
In this section, Agent can see the whole list of Knowledge Base topics with questions assigned to them and their answers. Knowledge Base is used to help users (Customers, Agents):

- Customer/Agent can find help while creating the Ticket ('Create new ticket'),
- Agent can also find help in the 'Ticket Details' the moment he enters the Ticket.

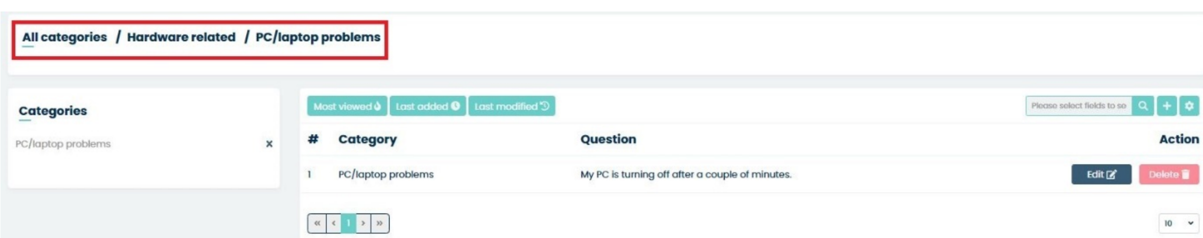
The default view shows the list of all available topics.



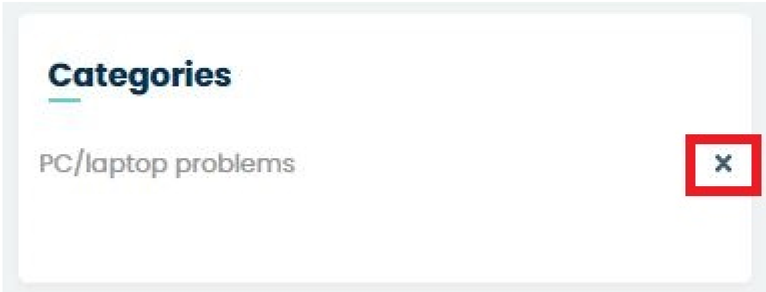
On the left side, you can see available categories.



Here you can choose one category, or go deeper to a sub-category in order to find the topic that fits your needs. If you do so you can easily go back to any level above in the category structure by clicking on the category path in the upper side of the view.

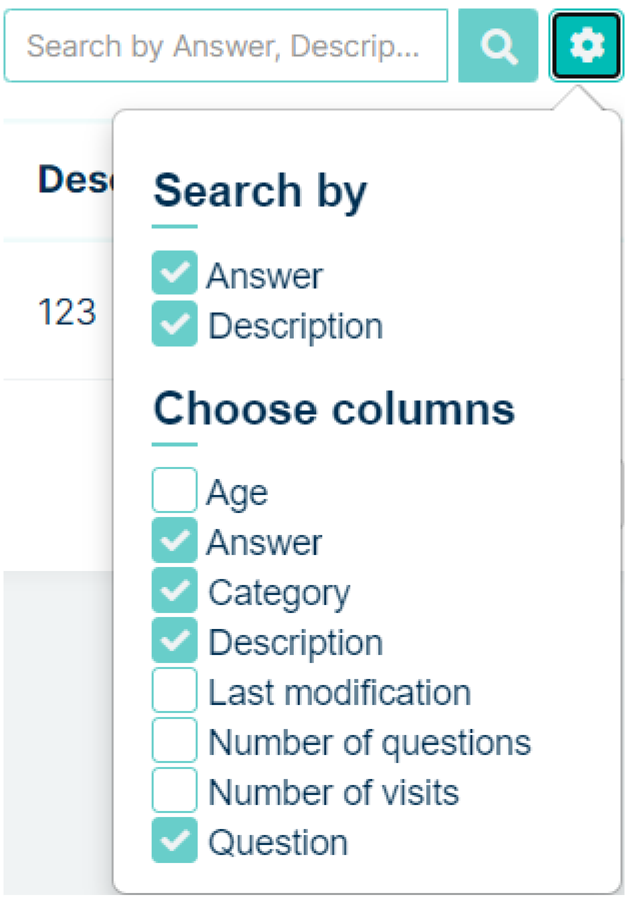


You can also click on the X button located on the right side of the currently selected category/sub-category. Each time you do it you will be moved one level above in the category structure.

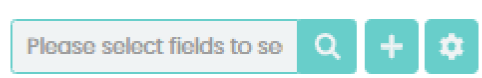


By default, in the main view of the Knowledge Base section, you will see the list topics with the following attribute columns: Category, Question, and Action. In order to see more information, you need to click the  button.

Once you do that you will see a small window, where you can select the desired information you want to see on the Knowledge Base list. Making any changes in 'Set column properties' is automatically saved, so you won't lose anything once you go to any other part of the system.

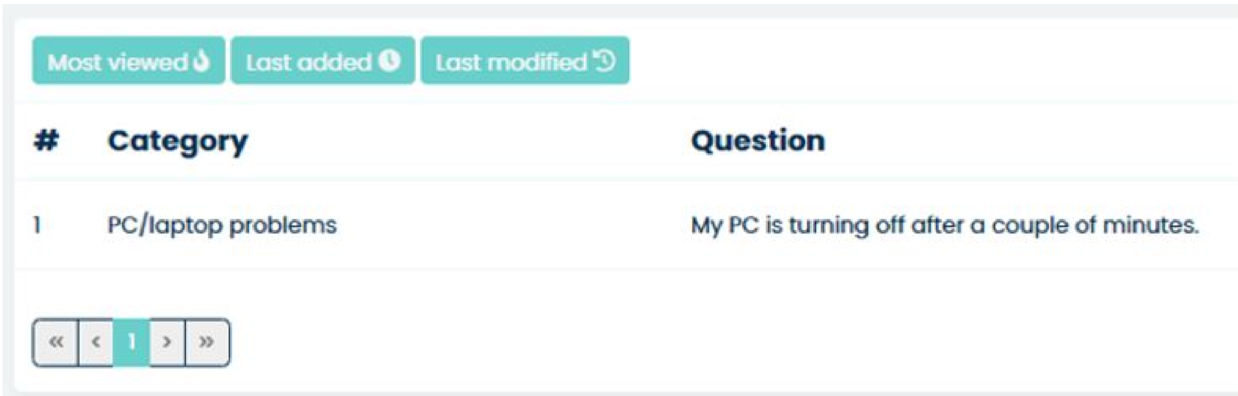


Also, you can look for a specific topic by using the "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.



In the upper part, above the topics list, you will see a three buttons:

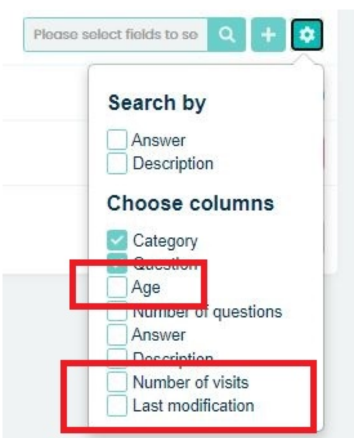
- ‘Most viewed’
- ‘Last added’
- ‘Last modified’



They are used for sorting the list by:

- **Most viewed -** from most viewed to least viewed (column ‘Number of visits’)
- **Last added –** from most recently added topic to the oldest one (column ‘Age’)
- **Last modified –** from most recently modified / most up to date (column ‘Last modification’)

Remember that in order to see any changes on the list while selecting the options above you need to have the right above-mentioned attribute columns selected.

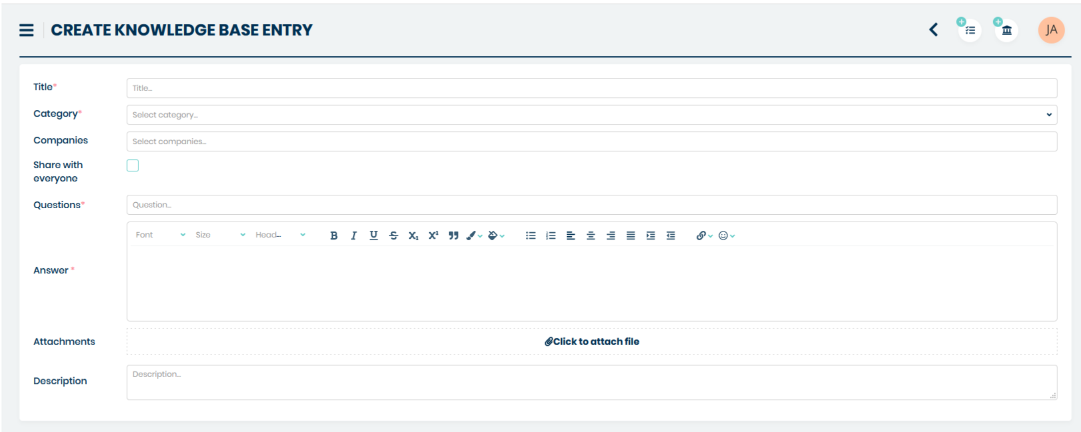


As an Agent user, you can create a new topic in any of the available categories. To do so simply click the button located next to the search field.

In the next view ‘Create Knowledge Base’ you need to fill up some fields:

- Title (required),
- Category (required): Here you have to choose a category to which the knowledge base belongs,
- Companies (optional): right here you can add many different companies to which the knowledge base will belong,
- Share with everyone (optional): Here you can decide whether a knowledge base should be accessible to all,

- Questions (required): right here you can add multiple different questions which will be answered in the 'Answer' field,
- Answer (required): here you can put detailed answers for all of the questions added in the previous 'Questions' field,
- Attachments (optional): Here you can add attachments, for example a picture.
- Description (optional): field where you can add some general description for the whole topic.

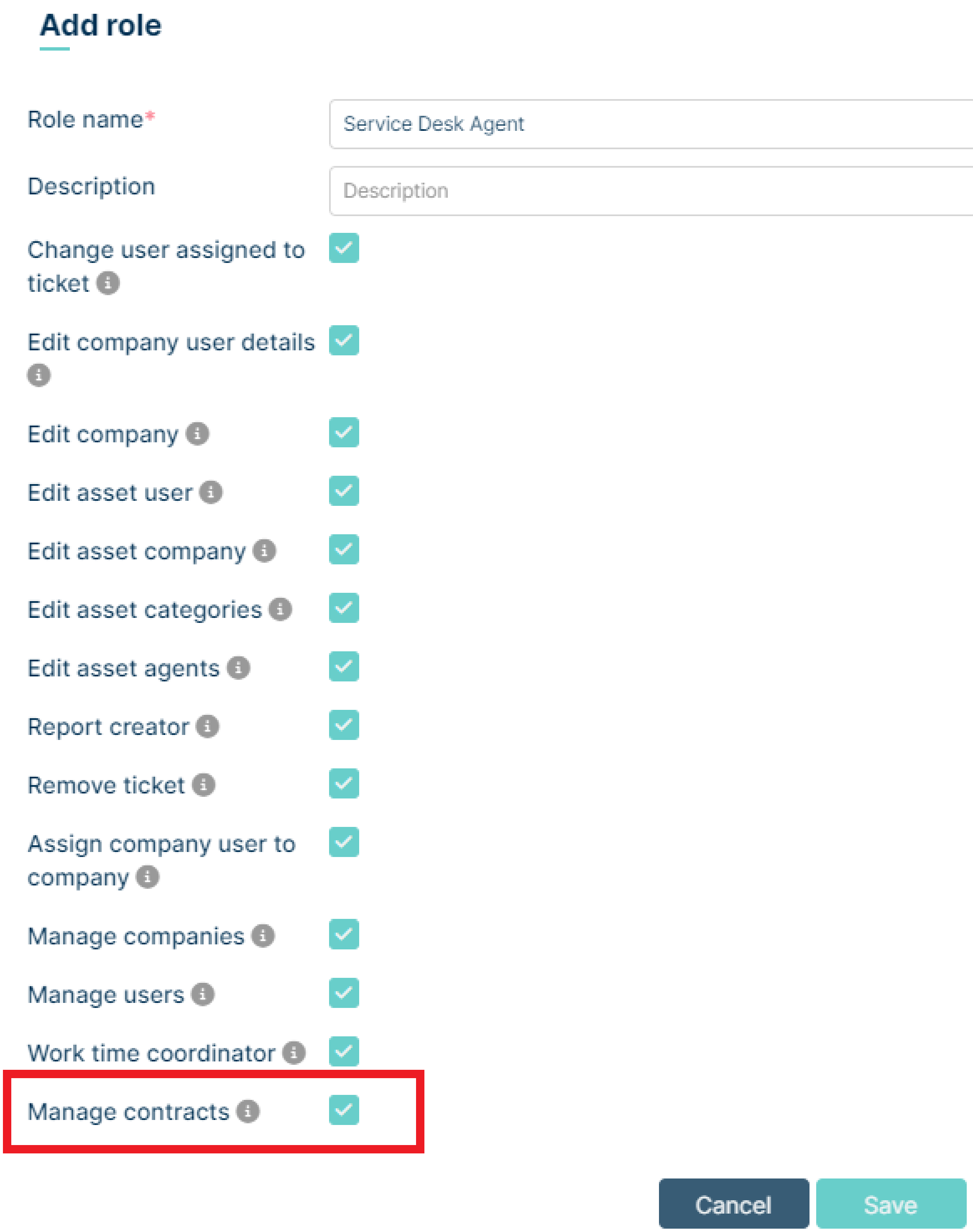


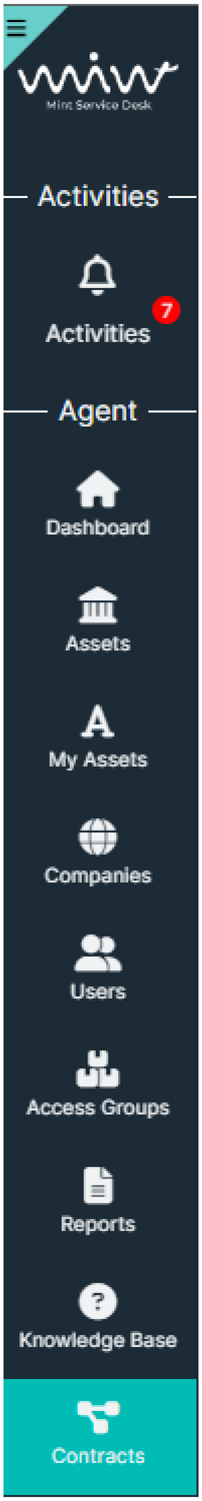
Once you do the steps mentioned above you can save your new topic by clicking on the 

button located in the right bottom corner of the view. After that you will see that a new position appeared on the list.

4.4.15 CONTRACTS

From this place, an Agent has acces to Contracts management. To do so, the Agent role must have checked option below:

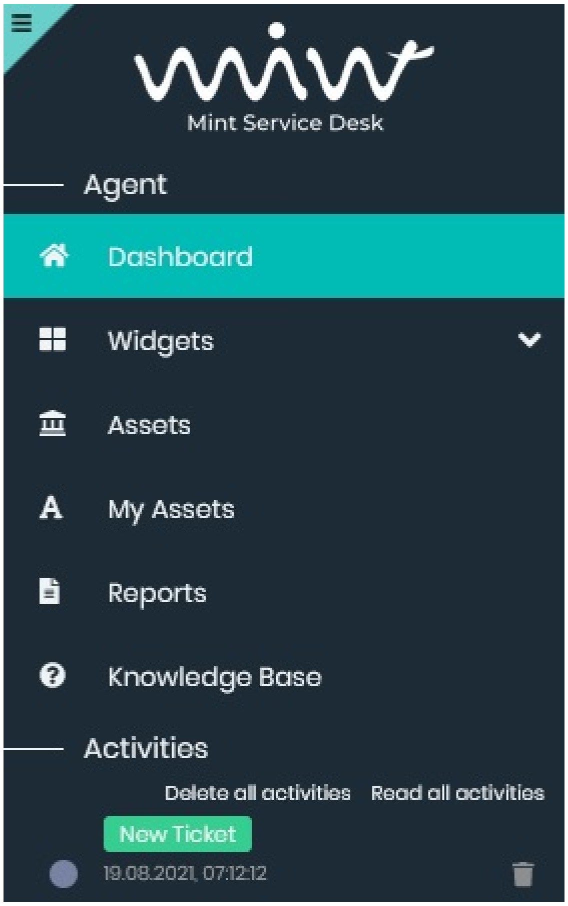

Add role
Role name*
Service Desk Agent
Description
Description
Change user assigned to ticket
Edit company user details
Edit company
Edit asset user
Edit asset company
Edit asset categories
Edit asset agents
Report creator
Remove ticket
Assign company user to company
Manage companies
Manage users
Work time coordinator
Manage contracts
Cancel
Save



Creation, modifying and deleting contracts is similar as in Admin profile and it is outlined in the admin section of documentation.

4.4.16 ACTIVITIES

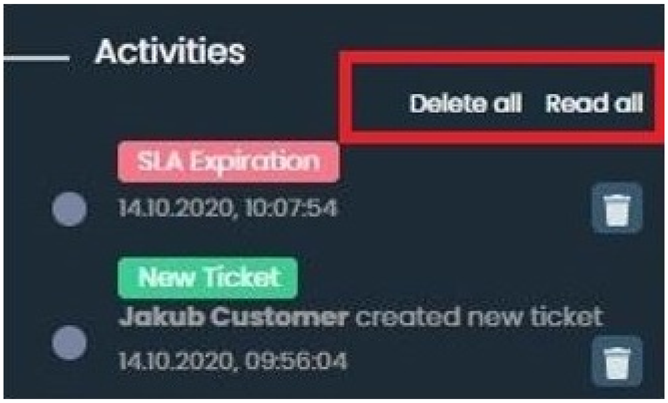
Just like with the Client account, on the left side, in the lower part of the sidebar menu, you will find the Activities section.



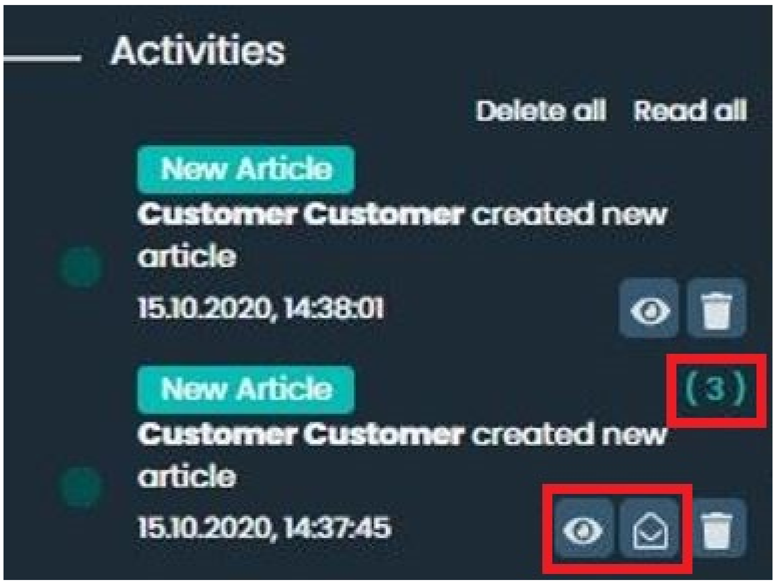
It will display the tickets with any new activity, so you could easily see what is new and go directly to the action. You will see a blinking position on the list each time a new change, like a new message (Article) from the Customer, has been made. The notifications are customizable (color, title, content, etc.), but only an admin user is allowed to do that.

You can delete any position from the Activities list, by clicking the button. Also, the admin user can customize e.g. the color of notification.

If you have more than one activity on the list you can either 'Delete all' of them (they will disappear) or mark all of them as already read ('Read all').

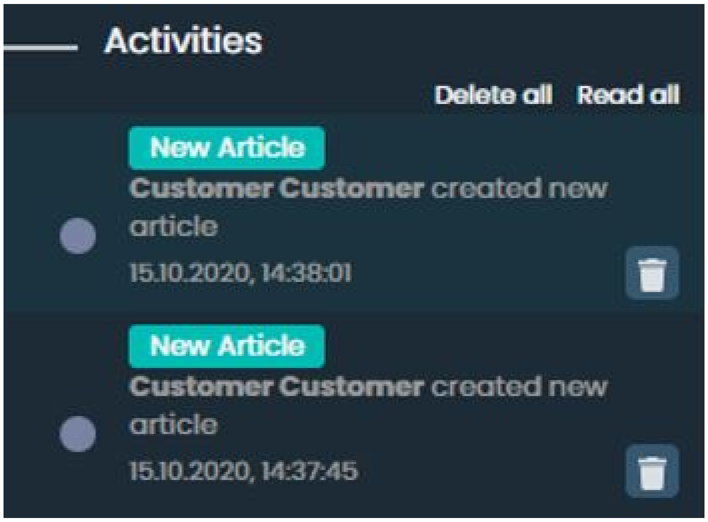


Also if you have a couple of unchecked notifications within one ticket, for example, a couple of unread messages from the Customer, you will notice a number presented on the right side inside the notification.



You can also click on the "Read'  button to mark the notification as already read (it will be grayed out) or even click on the 'Read all'  button to mark all of the notifications (described with a number) as already read.

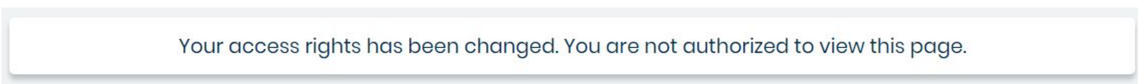
Once you use those options the notifications would now look like on the following screen.



If you have plenty of positions available on the Activities list, you will see only part of them. To see more click on the button 'See more activities' located at the bottom of 'Activities' section, below the last notification. Once you do that more of them will be loaded.

Each time you click on the notification in the 'Activities' section you will be moved to the Ticket Details screen where you can continue giving support to your customers.

Last, but now least, if you ever see the following message, while trying to access any Ticket or Asset, it means that the admin user has changed your access rights and you need to contact him and ask for help.



CHAPTER

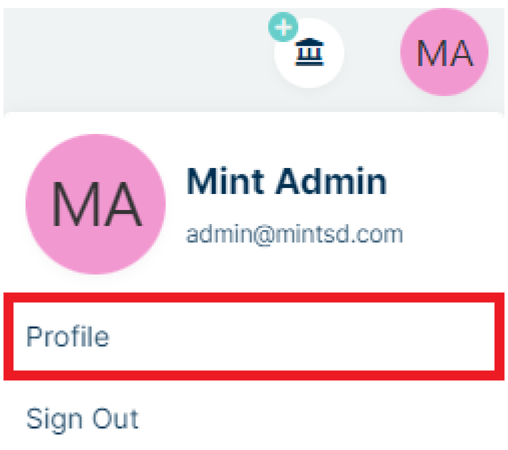
FIVE

ADMIN PORTAL

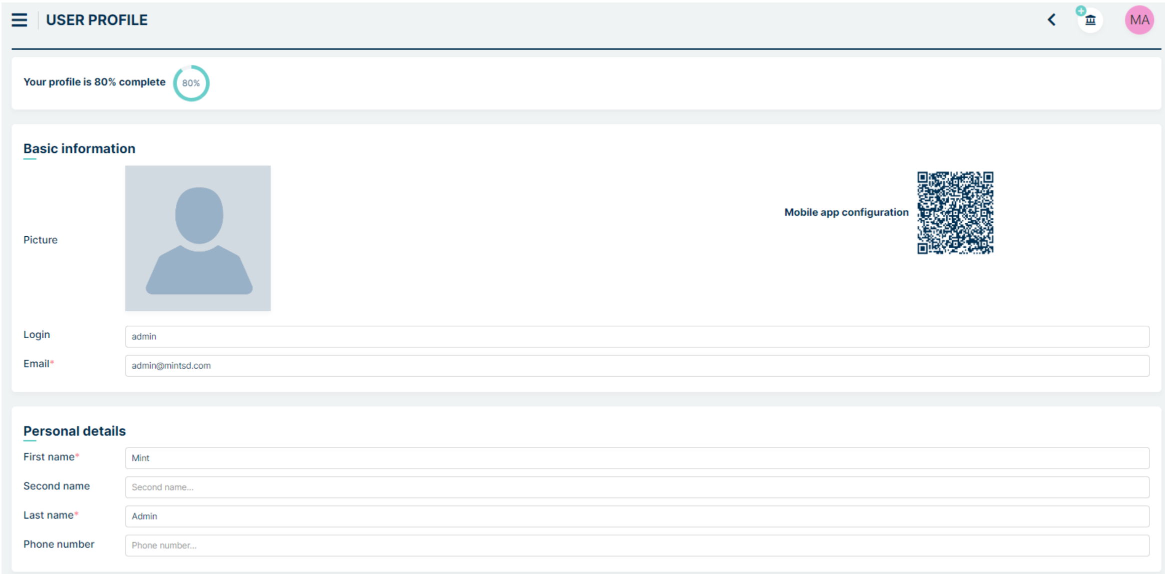
The MINT Service Desk administrator is able to log in on the same page as all the users. The system will lead you to the default administration panel 'Dashboard' where you will find some general information like the number of active agents, latest updates, etc.

5.1 PROFILE

If you click on "Profile" it will lead you to the section where you can change your personal data.

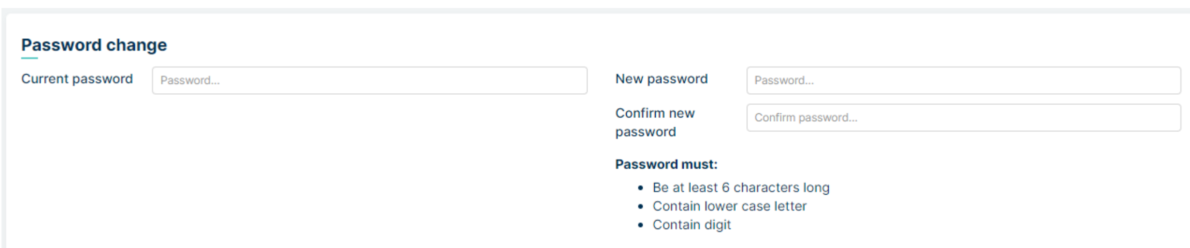


It works almost the same as for Agent or Client, with one exception.

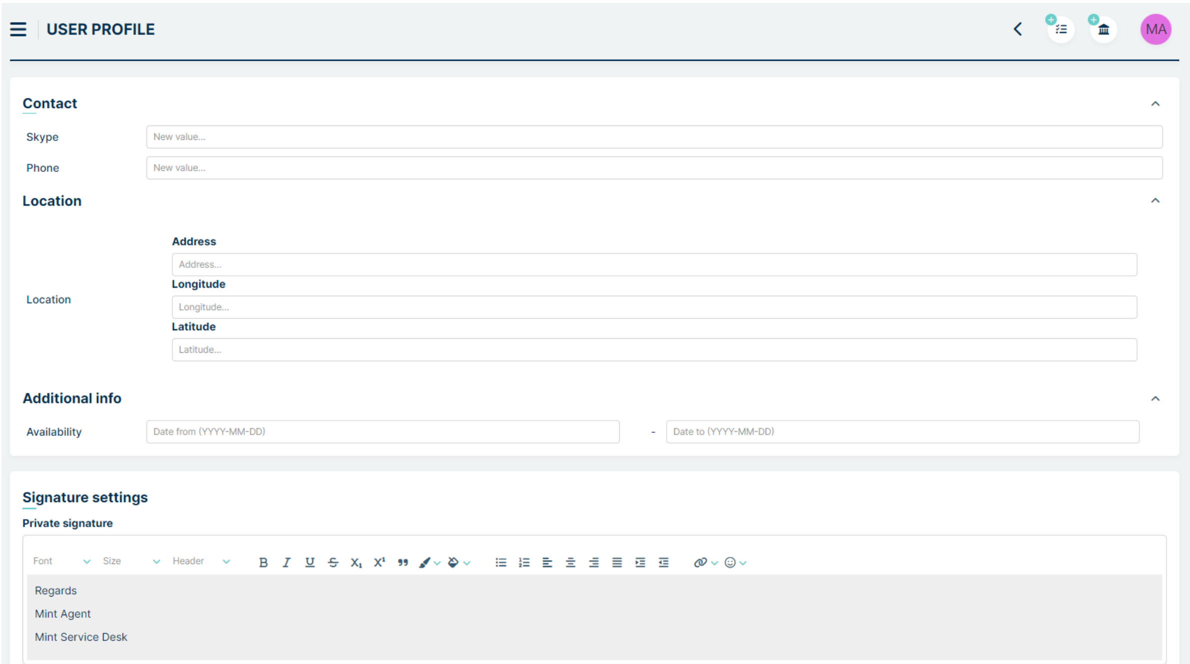


On the right side of the user "Picture", you will also find a QR code for MINT Mobile app configuration. Once you have configured your MINT Service Desk system you can use this QR code to automatically configure your MINT mobile app (if you already downloaded and installed it on your mobile device). Below "Picture" there is "Personal details" section with admin personal data.

Next section is "Password change" with fields where password change is possibe. There is also a tip about password policy according to Password Policy configuration in Admin > Settings >User.



At the bottom part of the 'User profile' view, below the section 'User settings' you will section with additional information that can be created and managed in Admin > Companies > User fields. By default, there is nothing, here, but once you create some fields there ('User fields'), you (and all of the users) will see them here.

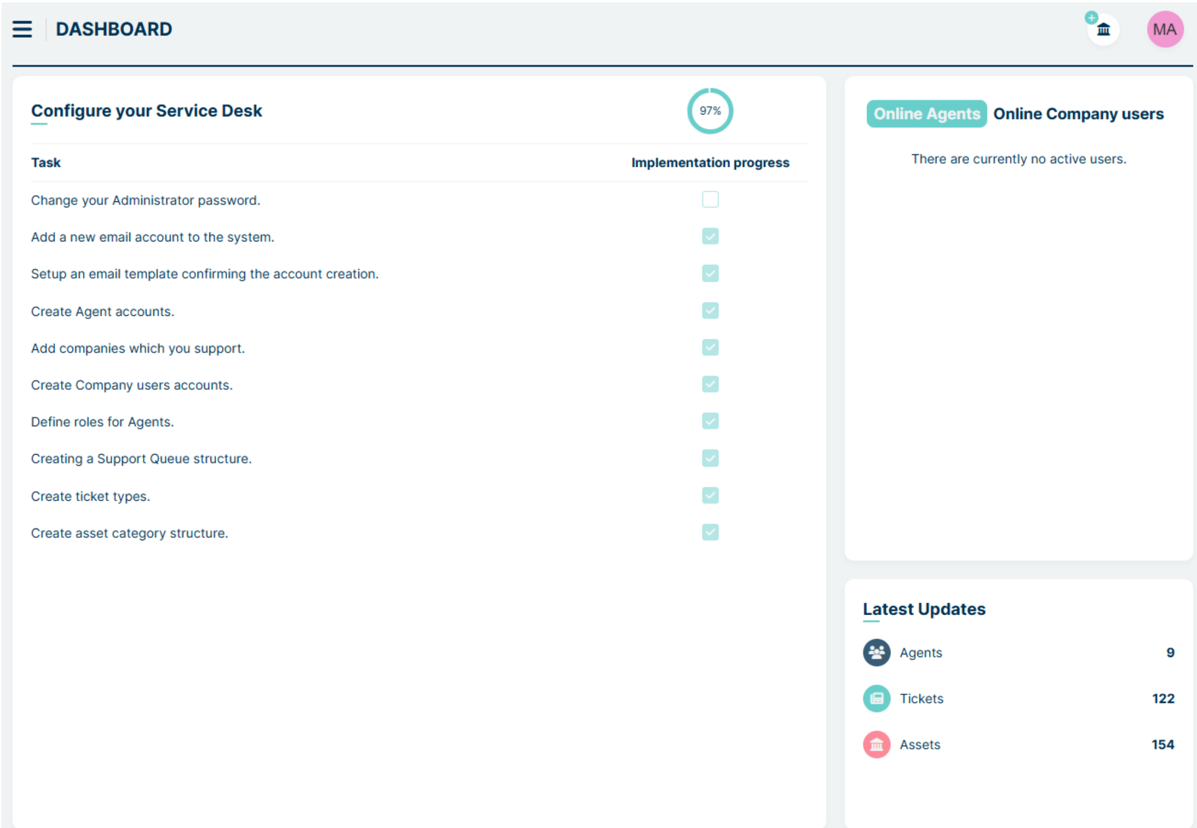


For a description of the other fields, see Web Interface => Basics => Profiles.

5.2 DASHBOARD

After successful login to the admin account, you will see a Dashboard view that contains some general information such as:

- number of Assets, Tickets, and Agents,
- number of Agents currently used within your Subscription type,
- Agents who are currently on-line and using the system,
- latest Tweets from Twitter to be up to date with latest changes and updates,
- the status of Mint SD configuration, which needed to be done before you started the proper work with the system. If you missed any of the steps you will notice that in this place.



One thing worth explaining in more detail is the '**Configure your Service Desk**' section. During your first login to the Mint Service Desk system, you had to follow some required steps like e.g., creating an Agent account.

In the 'Upgrade' section you can see the available features. 'Synchronize feature flags now' this button is used to synchronize the current settings with the License server.

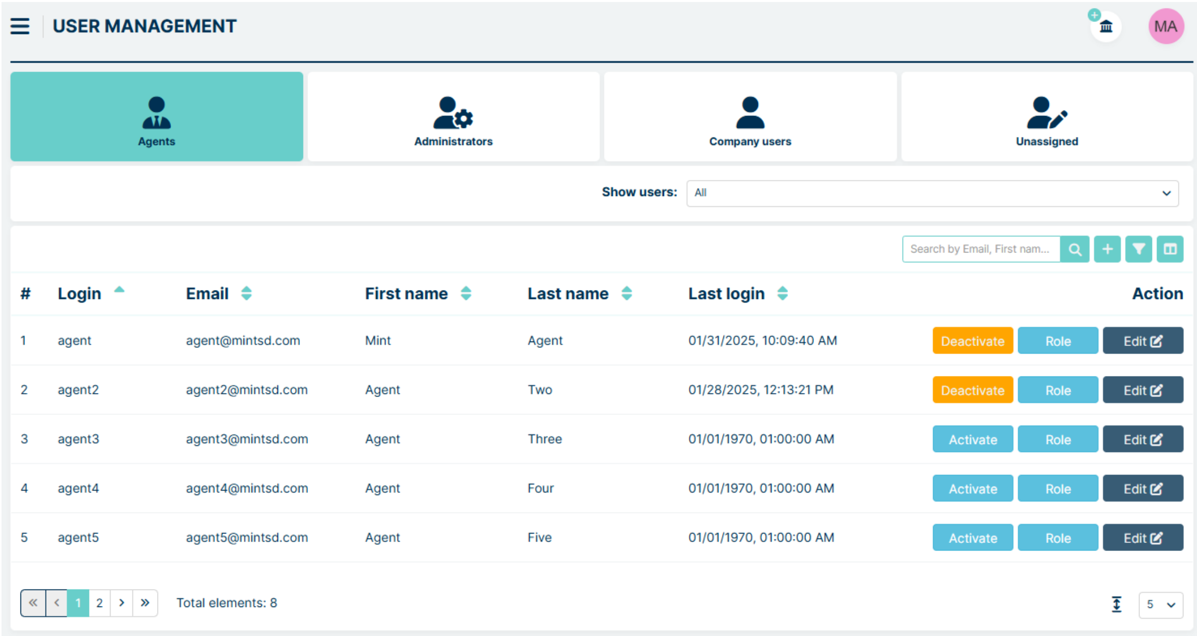
If you have missed any of those steps, right here you will notice that – there will an empty check-box on the right side. If you want to go to the particular place in the system the missed position refers to, just click on that position on the list. The system will direct to the right place.

5.3 USERS

In this part of the MINT Service Desk system, you will find the tools that will help you configure Users and their roles or allow you to set up some additional information for any kind of user.

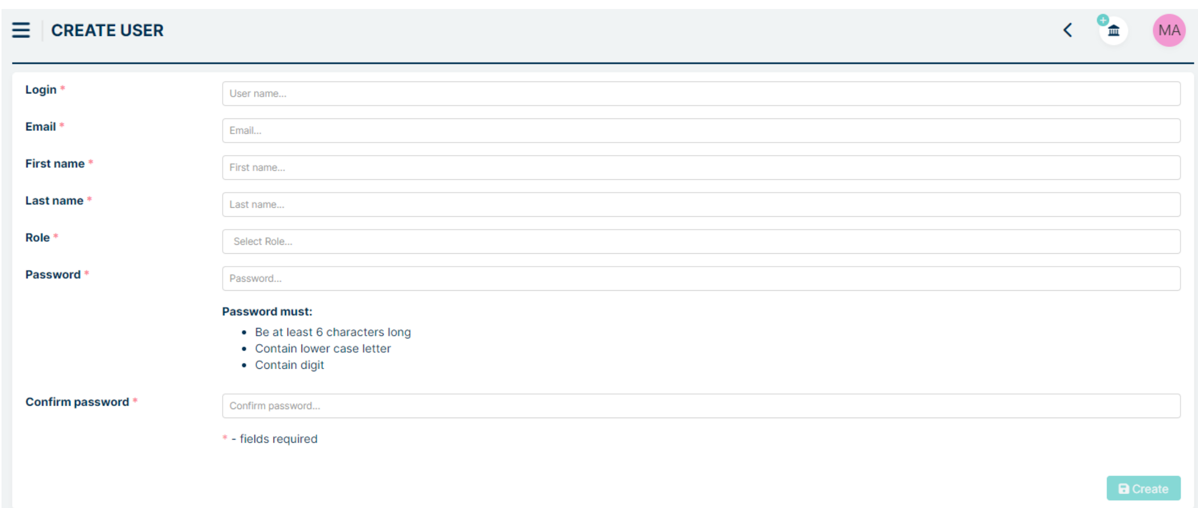
5.3.1 USER MANAGEMENT

In this place you will be managing your Users.



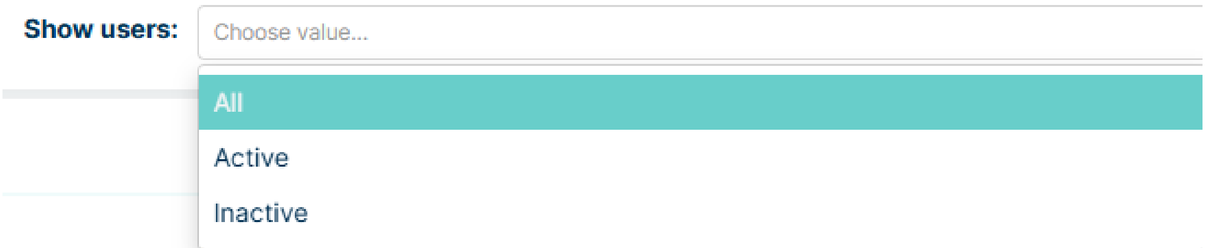
If you want to create a new user, you need to click on the  button, located on the right side of the search box.

Once you do that you will be moved to the 'Create user' form, where you need to put in some information regarding the new user. Depending on the role you choose for that user, he will be later shown on a different tab (Agents, Company users, or Administrators).

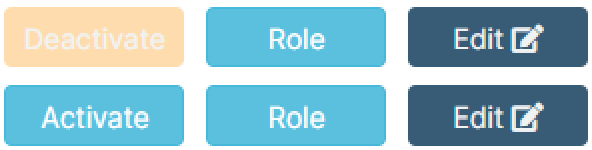


With every user, you can do a couple of things.

The first is that you can filter by active users, inactive users and all. To do this, select the option you are interested in from the list above the search bar.

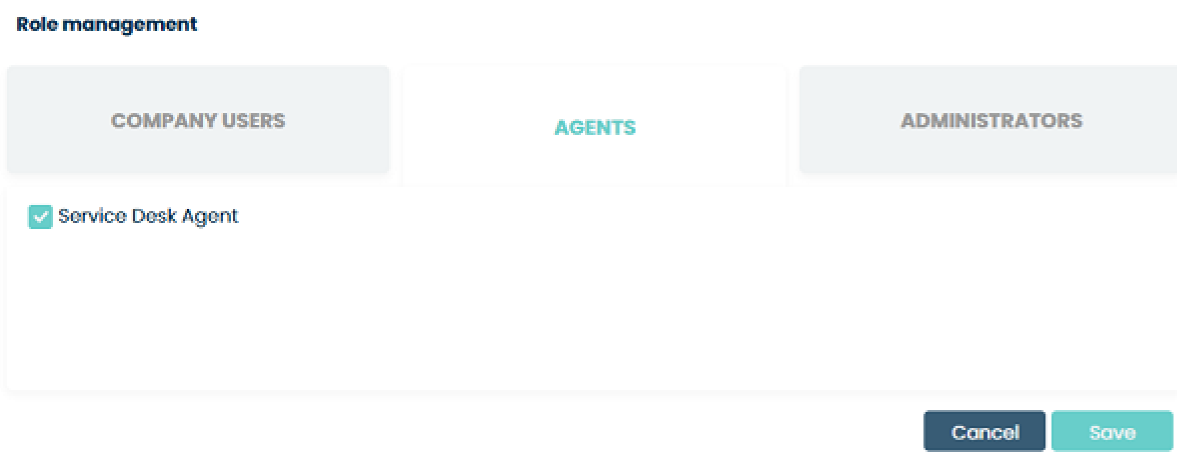


The second thing is that you can Activate/Deactivate the user. Deactivating means that the user account will be locked, and he will not able to log in.

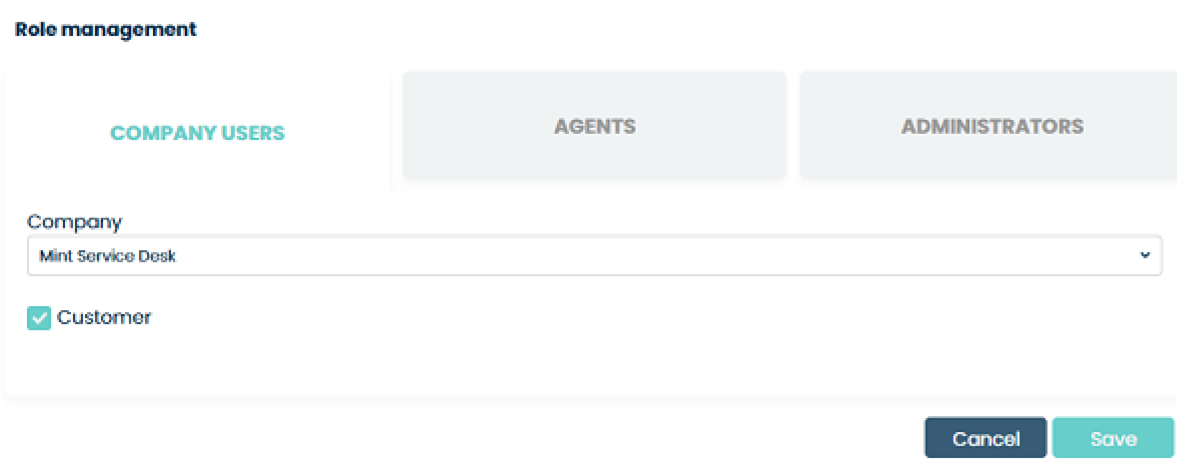


You can also change the user Role. Just click the 

and in the next window change the role for the desired one. Please remember that, if you want to change the role from Agent type to e.g., Company user or Administrator type, you first need to unselect the current chosen one. In the following example, we have an Agent with the 'Service Desk Agent' Role.



If we want to change it and grant the user a Company user type role, we need to unselect the 'Service Desk Agent' role and switch the tab to 'Company users'.

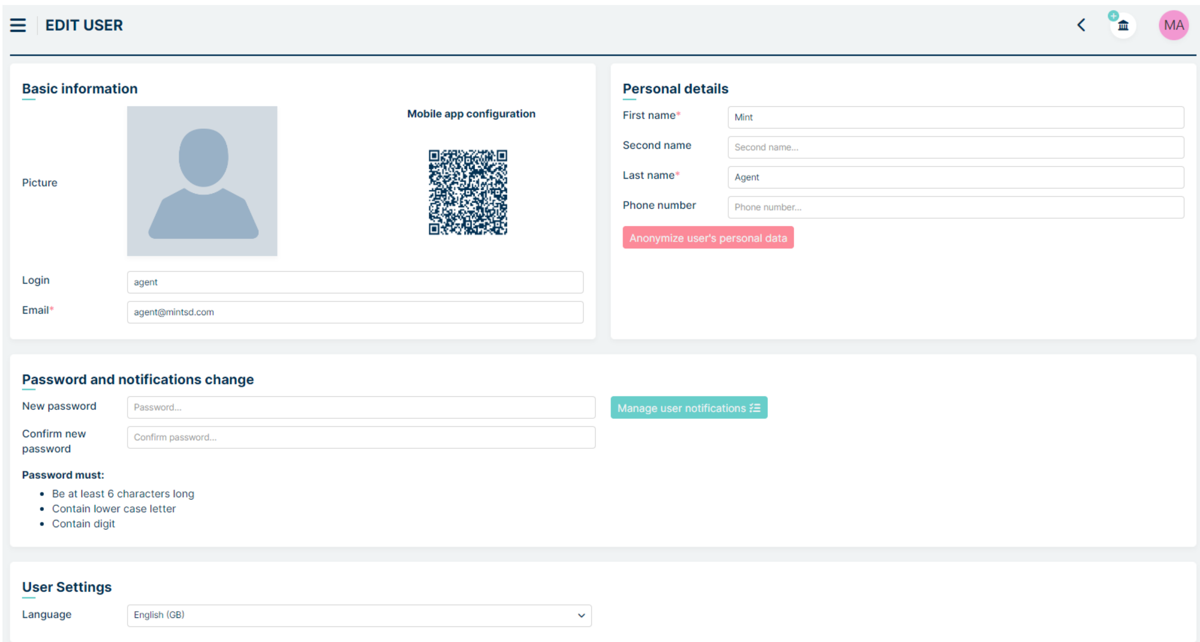


In this place, you need to choose and select one of the available Companies and one of its roles and click 

. Once you do that the user will disappear from the 'Agents' tab and be moved to the 'Company users" tab.

If you like to add or change some information about the specific user, you can click on the 

button. It will direct you to the 'Edit user' screen containing information about the user you just choose.

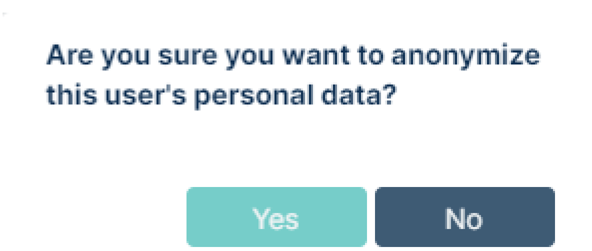


Now, make any changes you like and click the 

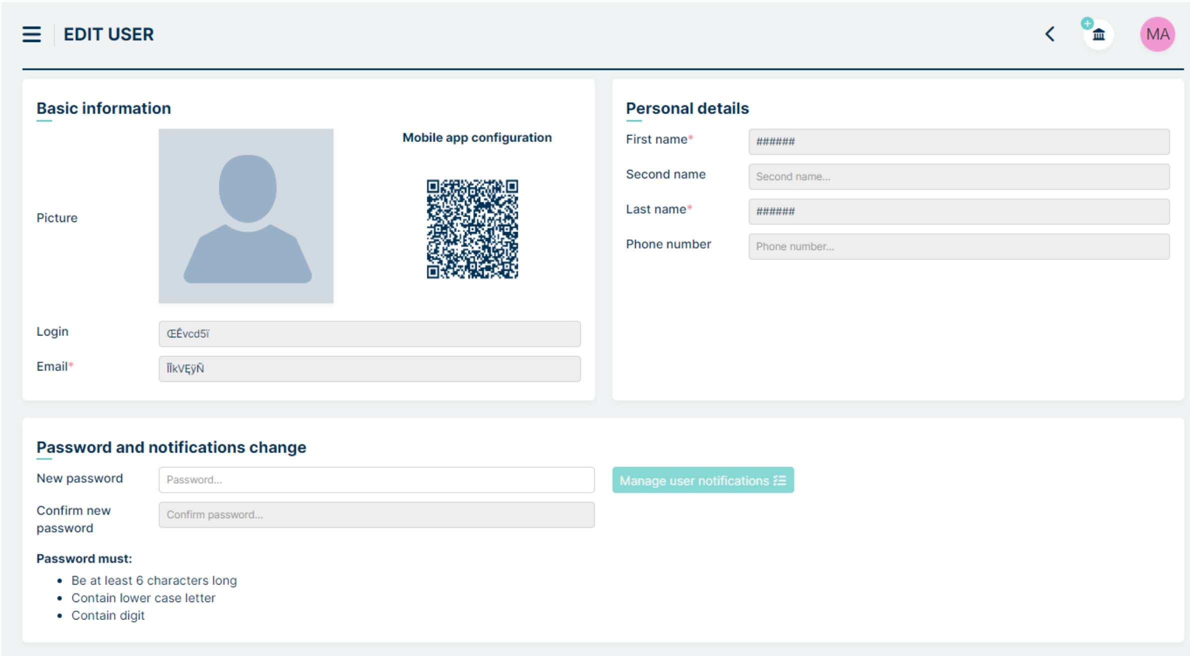
button.

User annonymization

From this place you can also annonimize user data (if admin set this in "Settings" => "Users" section). Annonymization makes user data unreadable, randomizing values as "Login", "Email" "Name", "Last Name" and deleting "Second name" and "Phone nubmer" data in these fields. After clicking on this button you have additional step to confirm

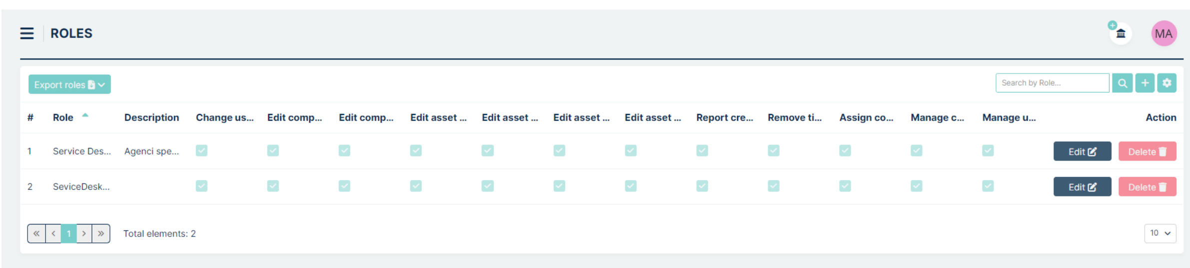


When you confirm it, data will be annonimized. User cannot use his account from now

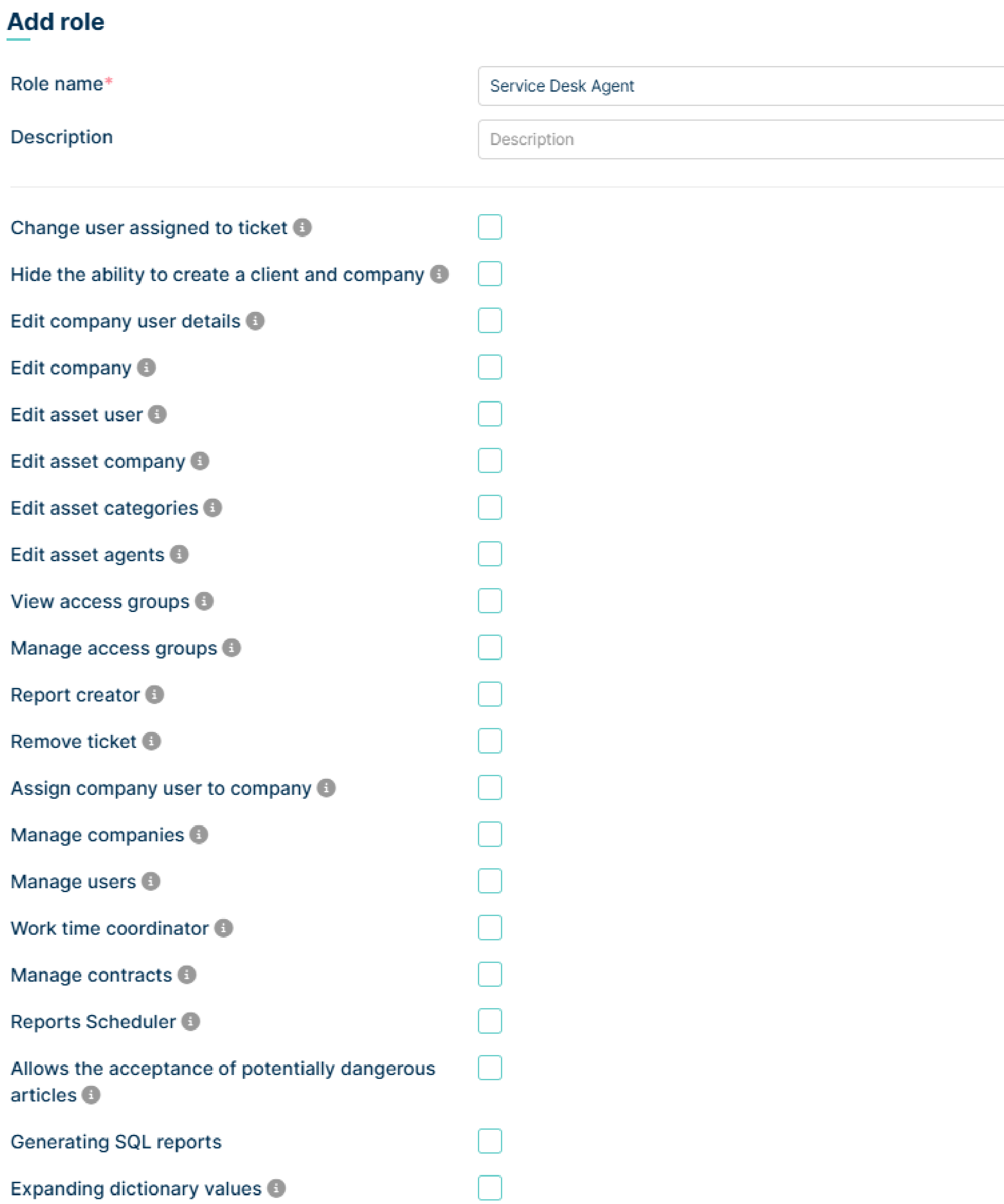


5.3.2 ROLES

In this section, you will be able to add new and manage already existing Agents Roles.



In order to add a new Agent Role, click on the  button, located on the right side of the search field. It will open an 'Add role' window.



Right here you need to name your new Agent Role and decide what type of actions you want to allow this agent to make.

You can choose and allow an agent to do one or more things:

- **Change user assigned to ticket** – means that an agent will be able to change the company user assigned to the ticket.
- **Hide the ability to create a client and company** – means that the buttons for creating a new customer and company in the ticket creation view will be hidden for agent

- **Edit company user details** – means that an agent will be able to change the basic company user data in the ticket view.
- **Edit company** – means that an agent will be able to change the Company assigned to the ticket.
- **Edit asset user** – means that an agent will be able to change the user assigned to the asset.
- **Edit asset company** – Allows changning of company assigned to asset.
- **Edit asset categories** – Allows changning of categories assigned to asset.
- **Edit asset agents** – Allows changning of agents assigned to asset.
- **Report creator** – allows to define reports.
- **Remove ticket** – after selecting this option, the agent having this role will be able to delete tickets.
- **Assign company user to company** – Allows agent to assign company user to company.
- **Manage companies** – Allows agent to manage companies.
- **Manage users** – Allows agent to manage users.
- **Work time coordinator** – Allows to manage work time reports.
- **Manage contracts** – Allows agent to add, modify and manage contracts.
- **Reports Scheduler** - Allows the agent to create scheduled reports and send them to specified email recipients.
- **Allows the acceptance of potentially dangerous articles** - Allows the agent to approve the display of articles identified by the Mint system as potentially dangerous in the ticket.
- **Generating SQL reports** - Allows the agent to create database queries in the Reports module.
- **Expanding dictionary values** - Allows the agent to add new values to dictionary attributes while creating and editing a ticket. The dictionary attribute must have the “Adding dictionary values” option enabled in Tickets -> Custom fields by the administrator.

Once you finish click 

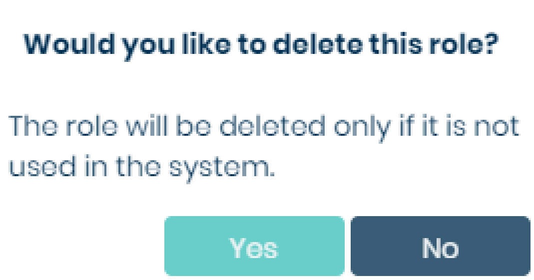
button.

If you like to add/change anything later for the role, you can use the 

button.

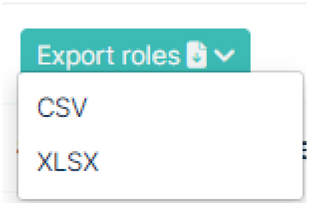
If you want to get rid of any Agent role on the list just click 

and confirm your choice by clicking YES on the confirmation screen. You will also be informed that role will **only** be deleted if it is not used in the system.



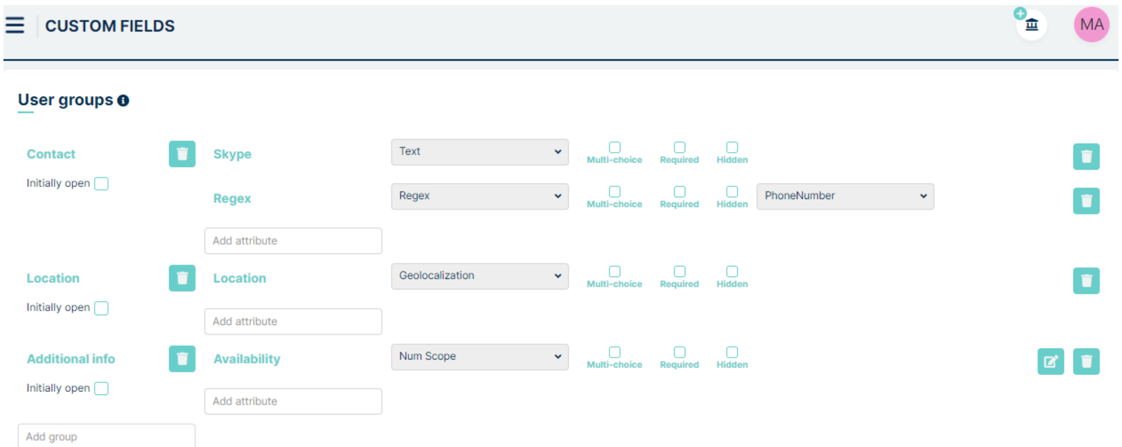
If you want to export your roles settings, you can click on 

button and simply export it to .csv or .xlsx file



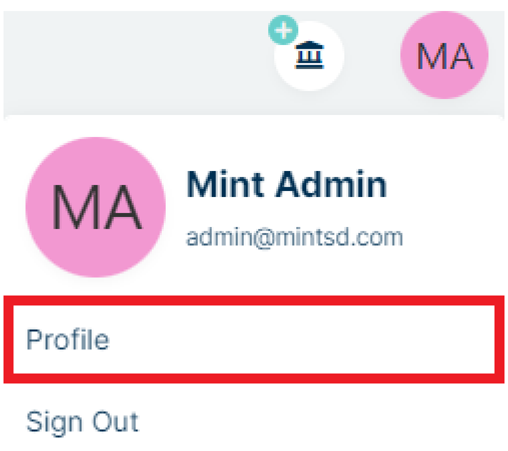
5.3.3 CUSTOM FIELDS

In this section, you will be managing the additional fields that might contain additional information for every type of user.

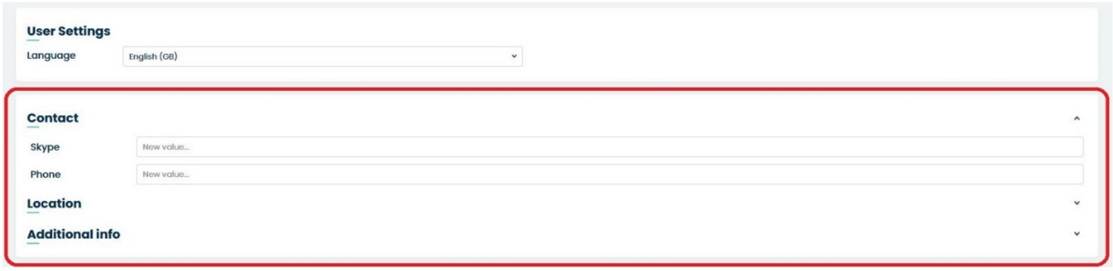


In the Mint Service Desk, each user has some pre-defined fields which are used for holding some information such as ‘First name’ or ‘Phone number’. That information is available for viewing in the ‘Profile’ part of the system.

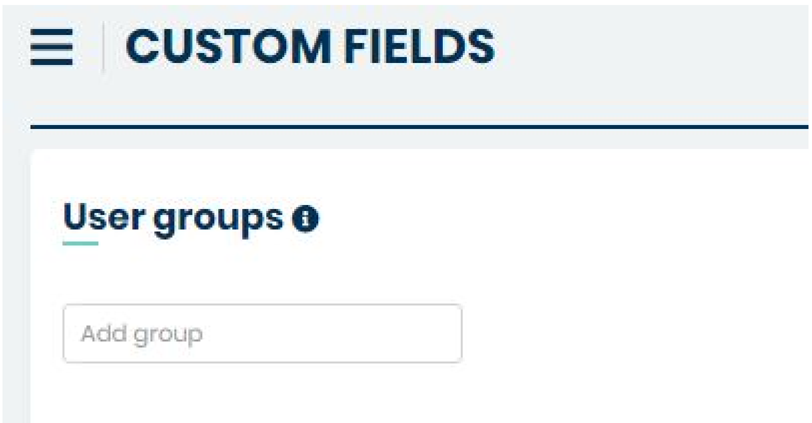
If you click on the round icon (or round picture if you have uploaded one in your profile) it will open a dropdown menu. Click on ‘Profile’.



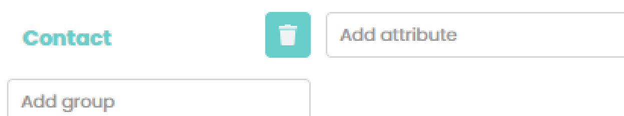
In the ‘Custom field’ section you can create an additional group of attributes for filling up (or selecting) with even more information. Those additional attributes will be later visible in the aforementioned ‘Profile’ section, at the bottom part of the view.



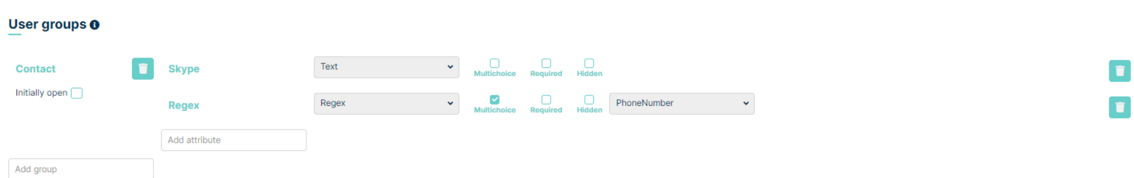
Let us create some. First, you need to create a group for those attributes. Click on the 'Add group' field and type some name.



Press 'Enter' on your keyboard to confirm the name. Once you do that a new field 'Add attribute' will appear on the right side.



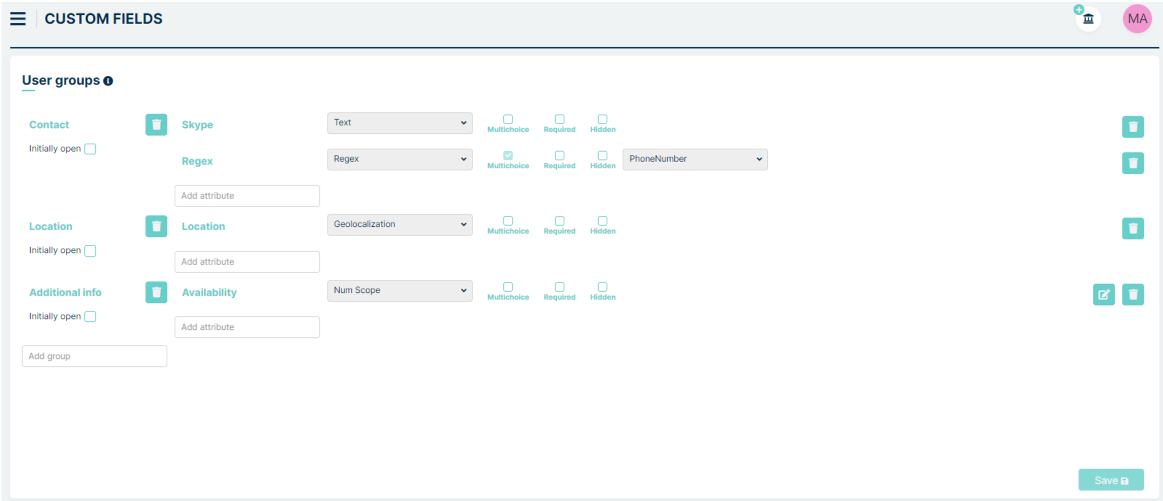
Now, add some attributes. First, in the 'Add attribute field' type a name and confirm it with 'Enter'. On the right side, you will see a new field 'Attribute type…'. Select one type from the dropdown list. You can also select a 'MultiChoice' check-box to allow selecting/adding more than just one Value later in the User profile view.



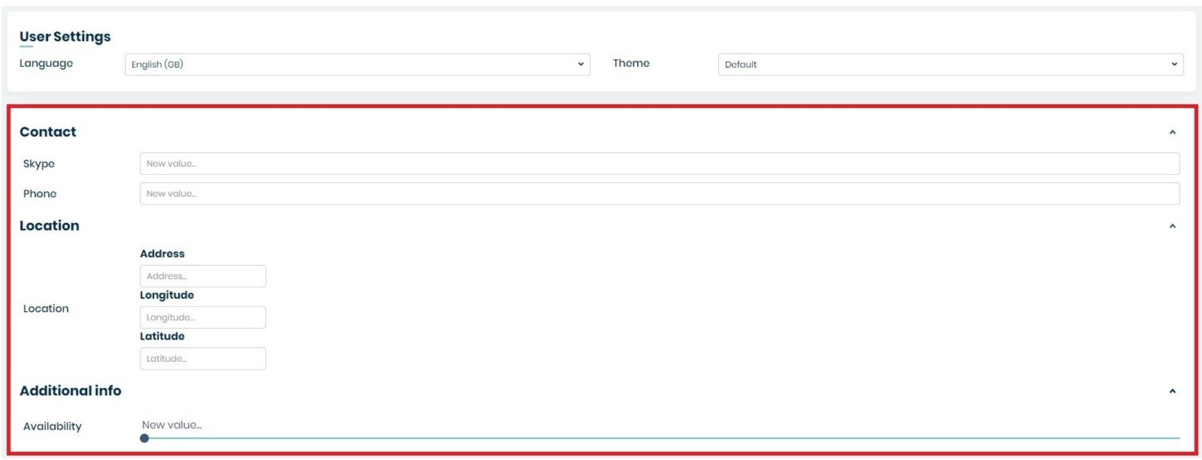
If you want to rename any of already existing elements just click on its name, make some changes, and click Enter.

If you want to remove anything just click on a trashcan icon  located on the right side. In the new window, you will be asked to confirm the action.

You can add plenty of attributes for the group. In the following screen, you can see a finished group with some important attributes already prepared.

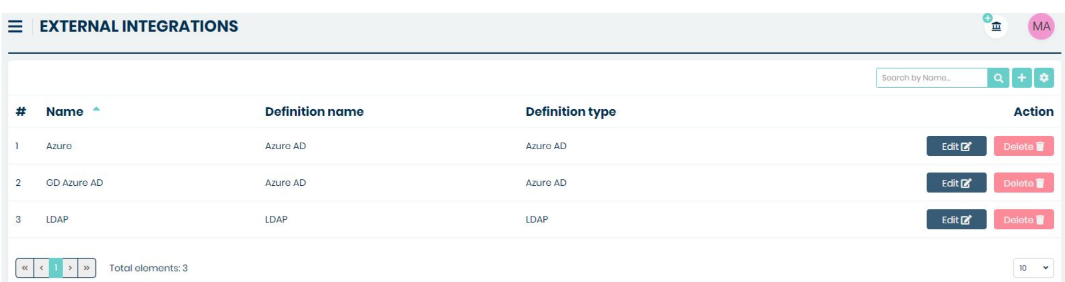


Now, if you move to the 'User profile' section, at the bottom of the view you will see those additional attributes.



5.3.4 USERS INTEGRATIONS

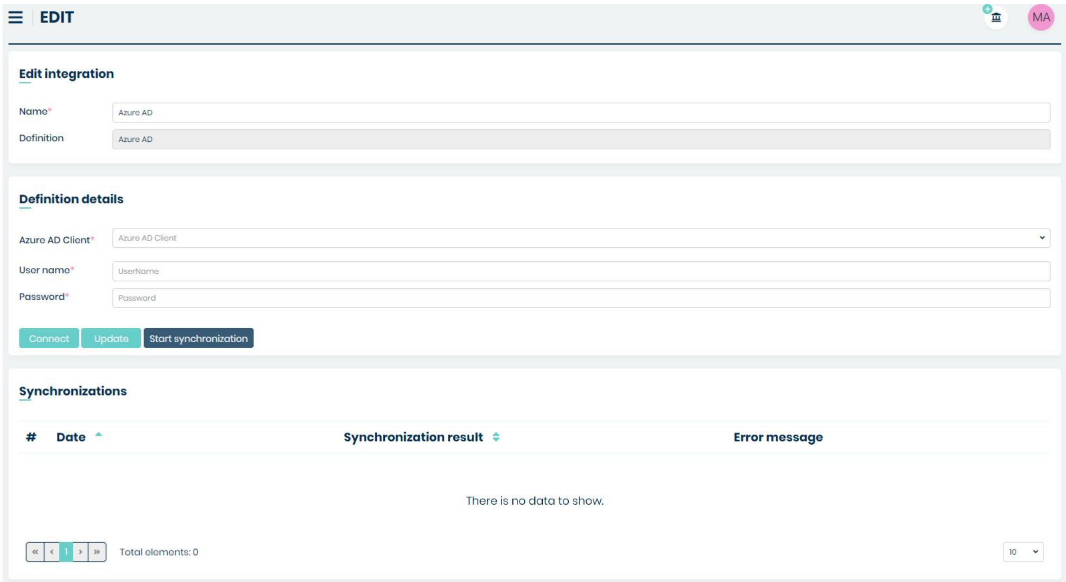
At this point in the system, you can perform user integration via Azure AD or LDAP. To do this, press the  button.



In the **Name** field, enter the name you want displayed on the list of all integrations. In the **Definition** field, select LDAP or Azure AD from the dropdown menu.

To complete the first configuration process, press the  button.

Then return to the list with all available users integrations and edit the configuration of interest.



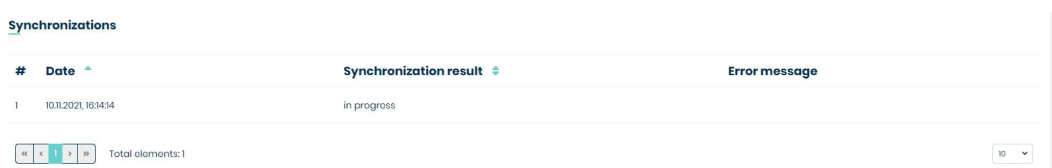
- **Azure AD Client/LDAP Client** - Here, select the option you configured in Authentication Backends from the dropdown menu.
- **User name** - user name of the person to integrate.
- **Password** - password of the person to integrate.
- **Search filter** - In the case of LDAP, you still need to add a search filter.

After entering the correct data, press the 

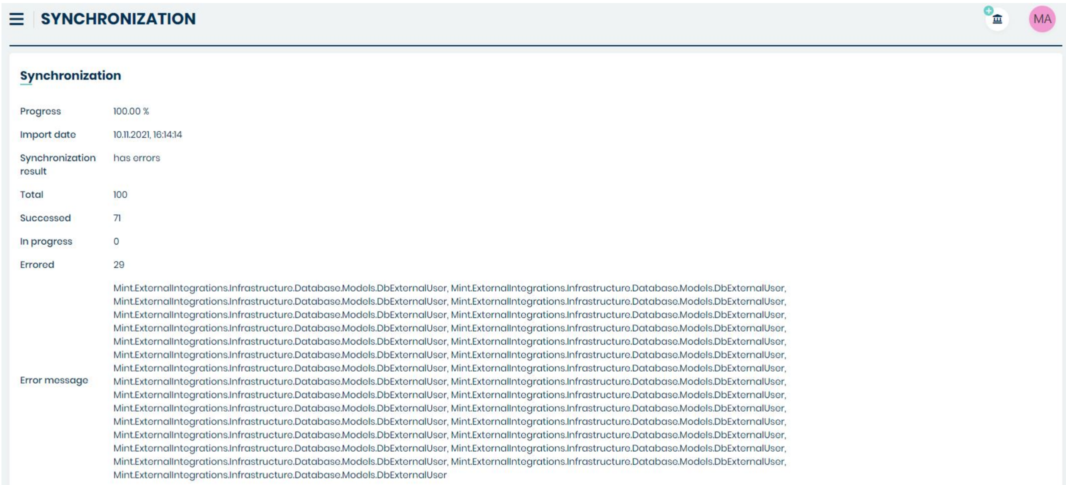
button. When the page reloads, press the 

button. If the configuration is correct, an appropriate message will be displayed. The next step is to press the 

button. After refreshing the page, a new entry will appear in Synchronizations.



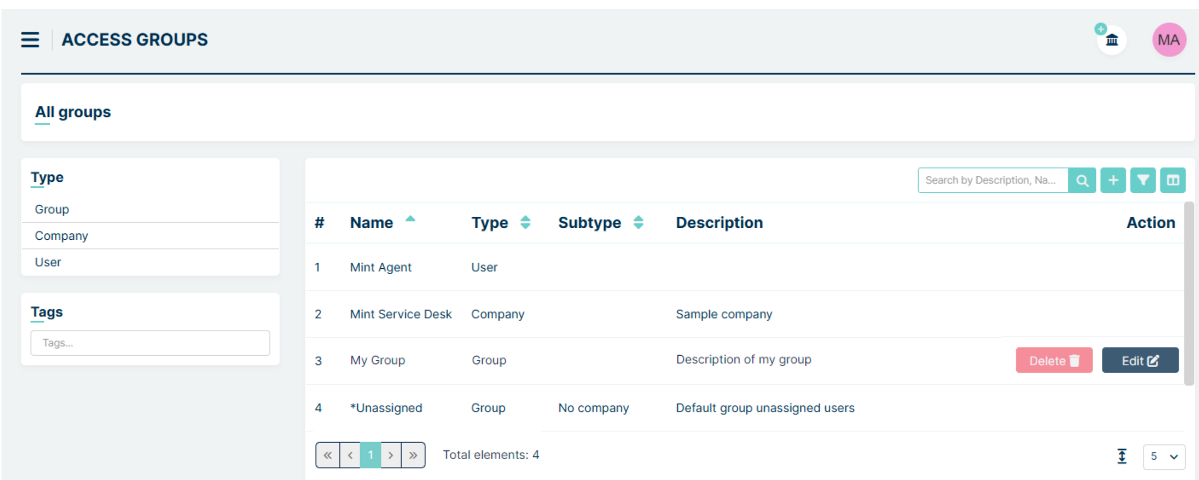
It is worth remembering that the page will be updated only when the page is reloaded. When you enter a particular sync, you will see a summary of how the sync went.



At the very top, progress, the date the sync was performed, the result of the sync, and the sum of all operations along with successes and errors appear.

5.4 ACCESS GROUPS

The Access Groups feature is a place where an administrator or agent can manage the scope of access of agent roles according to companies assigned to ticket. To be able to manage access, a company must be registered in the MINT system in the Companies section. An agent can manage Access Groups or only have view access to those assigned by the admin. This is determined by the “Manage Access Groups” role in Users -> Roles. If this role is active, the agent has management rights equal to those of the admin.



There are two types of groups

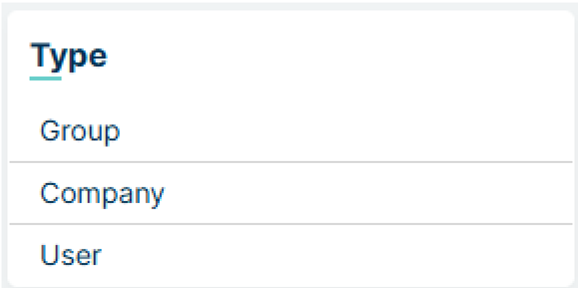
First are automatically created by the system. We cannot modify their name or delete them in this section. These include:

- Unassigned user group - this is the default group for tickets that do not have a company assigned to them
- User - for each agent, its access group is automatically created here
- Company - for each company, its access group is automatically created here

The second type is groups created by the Administrator or Agent. They are defined in the Type column as ‘Group’, and we can modify their name and description, as well as delete them.

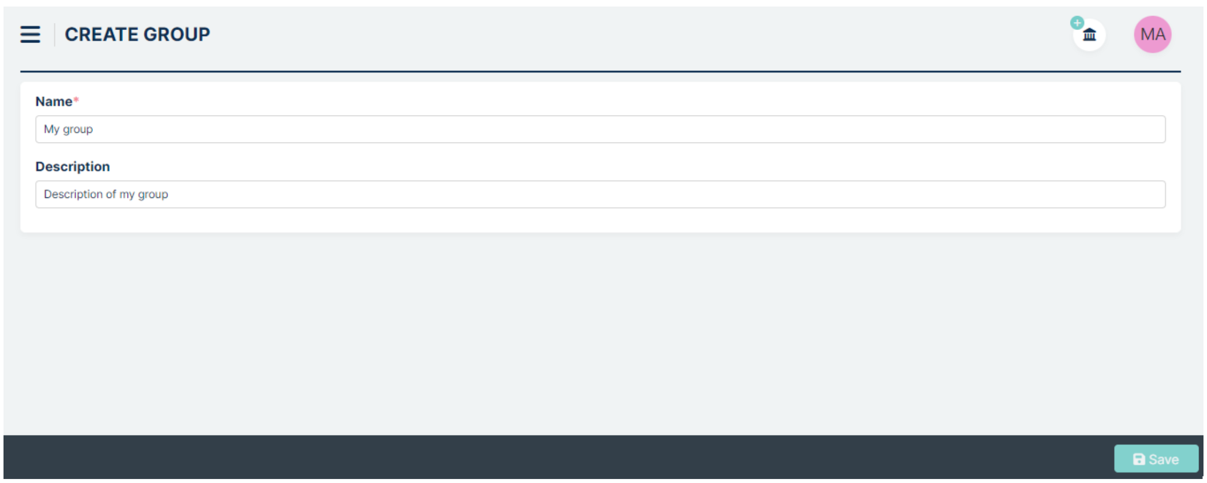
We can both include and exclude each group to another, however we cannot assign other groups to Company and Unassigned user group. You can also assing one agent group to another.

We can also filter access groups by types: Group, Company or User



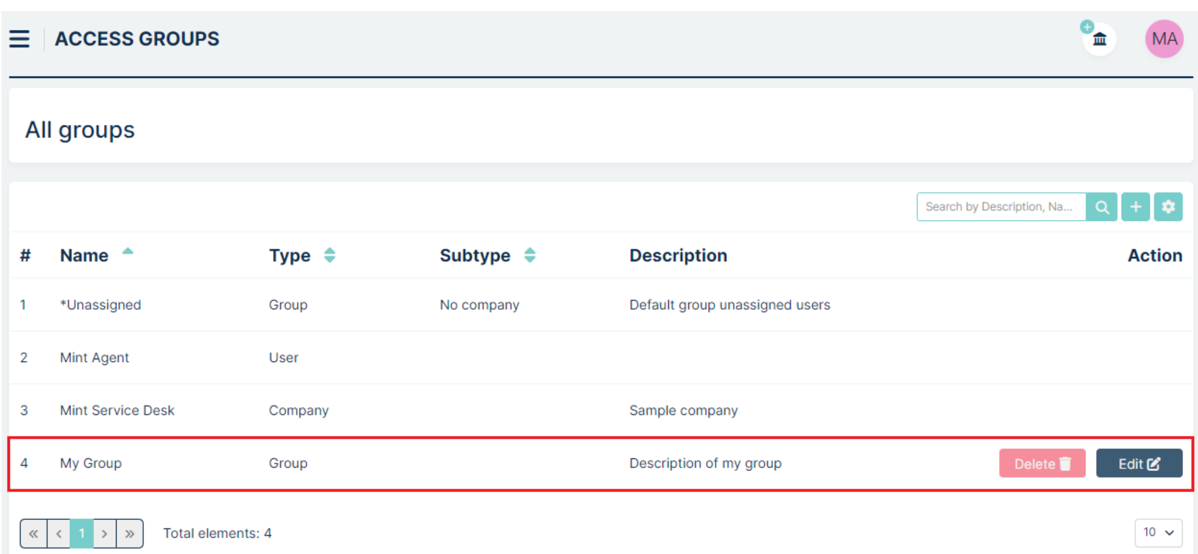
Create a group

To do this, click on the  button located in upper right part of window and you will see new window like below



Fill al least the "Name" field and press 

. New group will appear on the list



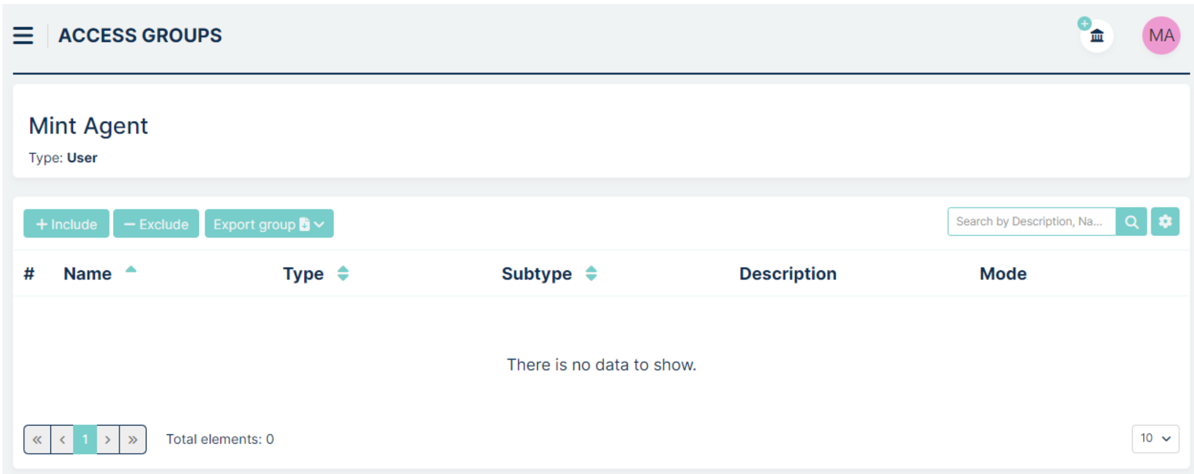
We can 

name of this group and 

it.

Group view

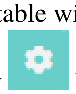
Let's describe some more here. Enter the group (for example Mint Agent) by clicking on it



You see new window with 

, 

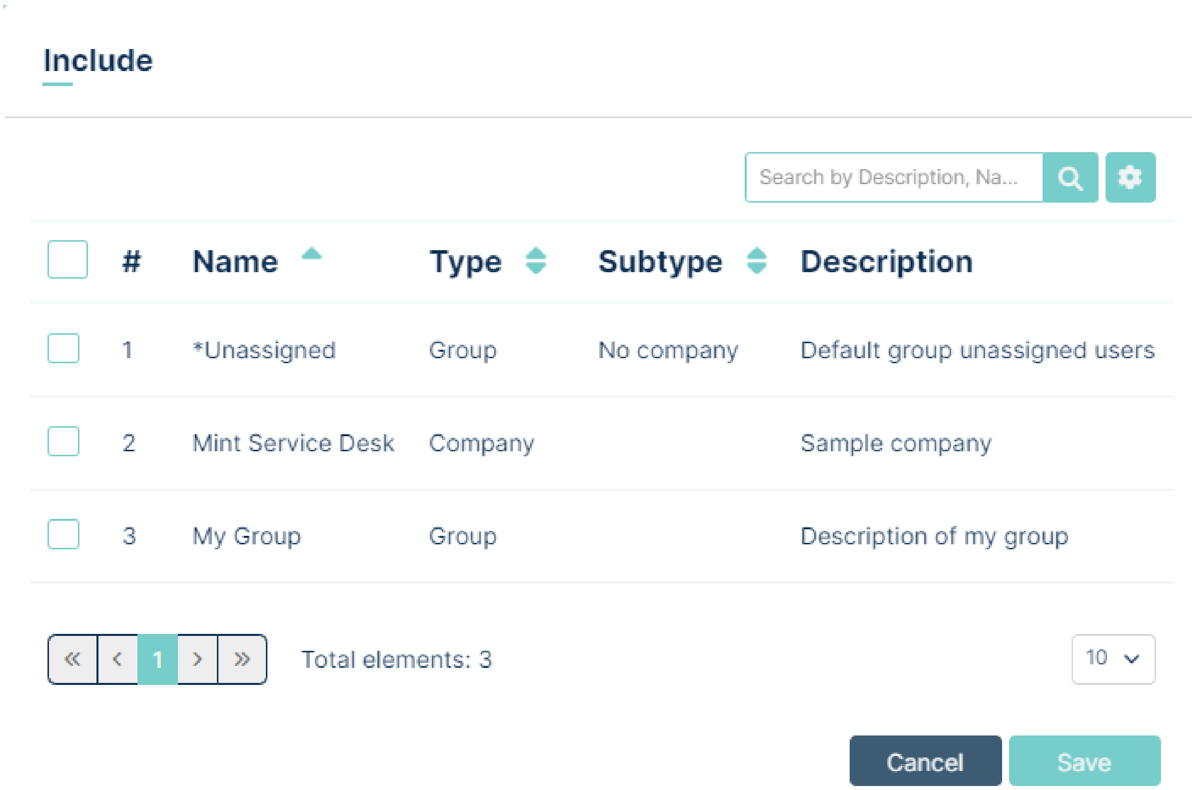
and 

buttons located in upper left side. In the centre you see a table with colums, where included or excluded groups will be shown. You can easily modify view of these columns by  button located upper right.

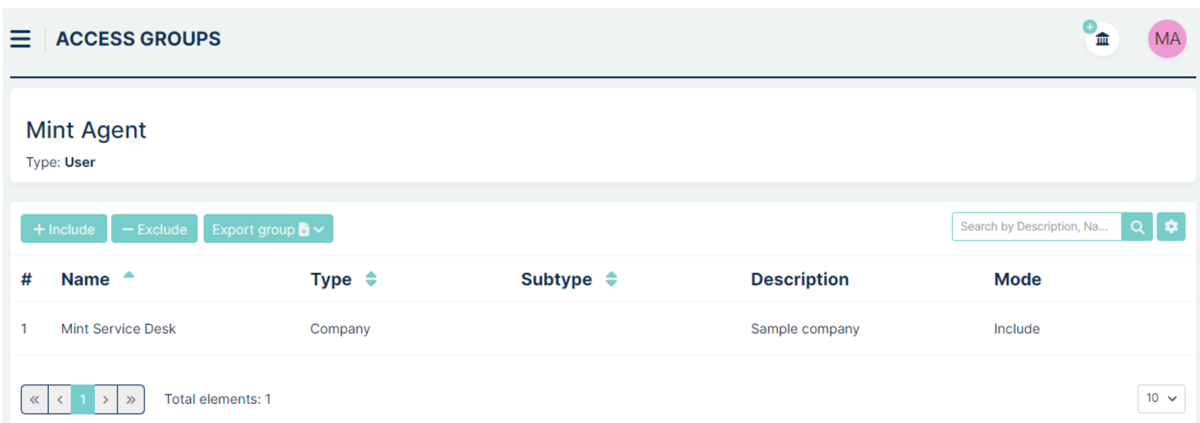
Include group

To do this, press the 

button. You will see group list.



You can select as many of them you want. After selecting press Save. Groups will appear in table.



To remove group from table, press the + Include again, uncheck selected gruops you want and press Save.

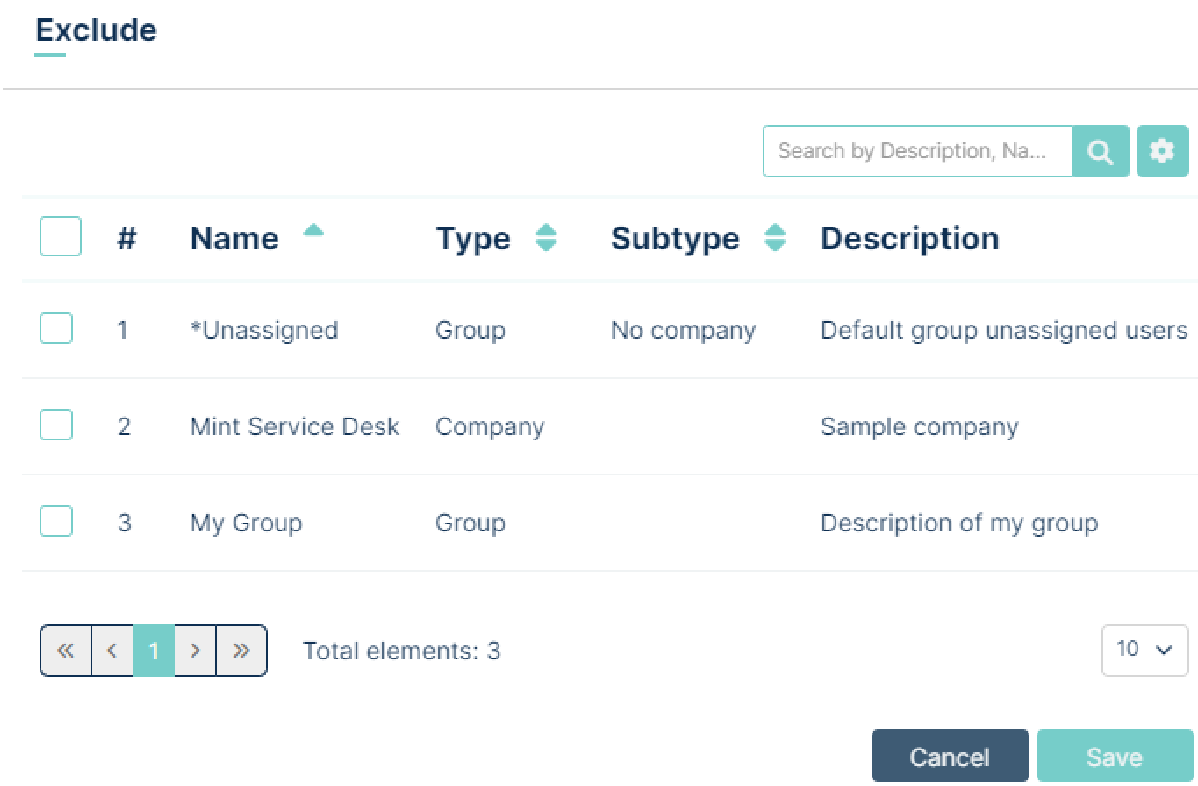
Use example

There are two companies in the MINT system: A and B. We want the Mint Agent user (who is in the agent role) to only have access to Company A tickets. We therefore assign the group of company A to the Mint Agent group. in result, the agent can only see the tickets of company A, assuming agent has permissions to the appropriate queue and ticket type.

Exclude group

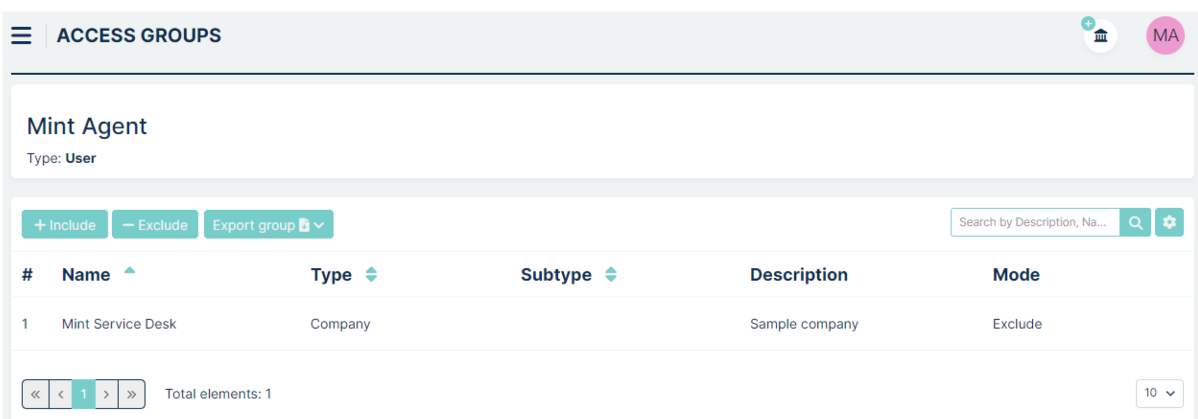
Press the 

button. You will see group list.

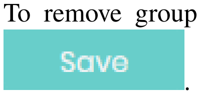


You can select as many of them you want. After selecting press 

. Groups will appear in table.



To remove group from table, press the 

again, uncheck selected gruops you want and press 

.

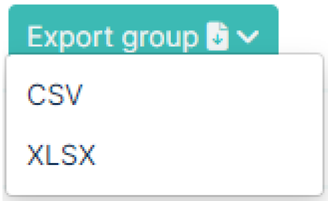
Use example

There are three companies in the MINT system: A, B and C. We want the user Mint Agent to have access to a group created from these three companies. Next we want to exclude company C in Mint Agent group. We therefore first create *a group with the example name "Company Group" and add Companies A, B and C to it. We assign the "Company Group" to the Mint Agent group and next we exclude Company C. As a result, the agent sees Company A and B tickets, but does not see Company C tickets (assuming he also has permissions to the appropriate queue and ticket type).*

Export groups

By 

you can easily export group list to .csv or .xlsx format



5.5 APPROVALS

5.5.1 BASIC INFORMATION

Approvals functionality in Mint Service Desk is used for issuing decisions for requests in a new status: 'Pending Approval'. This functionality is designed to allow decision-makers to make decisions on tickets (Accept or Reject the ticket), according to rules previously configured by the Administrator. Tickets awaiting for decision are blocked from editing until the required number of users approve or reject the ticket according to the configuration.

In brief, the process is as follows. Admin creates a configuration setting the rules and decision makers. He then creates a Pending Approval status in the selected ticket type and assigns a configuration to it. The next step is to configure the notification for the start of the decision process, positive decision and negative decision. Once the configuration is complete, agent or customer can create ticket requiring a decision on the selected ticket type. The agent changes the status of the ticket to the Pending Approval status created earlier. The ticket is blocked and cannot be changed or edited until a decision is issued. The users marked as decision makers then accept or reject the ticket. When the required number of votes with the predetermined configuration is reached, the ticket changes status to Accept or Reject and is unlocked. Throughout the process, the designated users receive notifications according to the configuration, while the history of the request records the decisions issued.

Once the process is complete for a given application, the same Pending Approval status cannot be set again.

Full configuration requires to do the following steps in Admin profile:

1. Creating configuration Approvals tab

2. Adding Pending Approval status in Statuses section

3. Creating Notifications

The process of moving to Pending Approval status and decision-making takes place in the Agent and Customer profile and is described in the last part of this section.

To go directly to the section that you are interested, use the menu on the left.

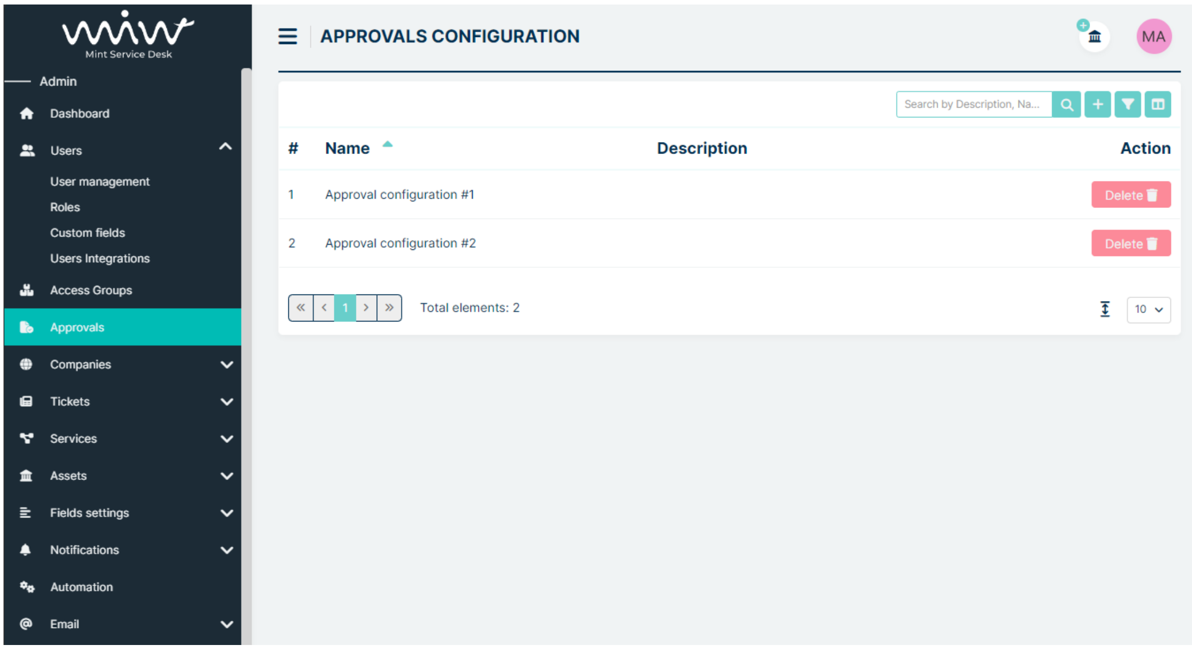
5.5.2 APPROVALS TAB

CONFIGURATION TREE

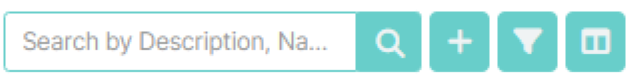
In the Approvals tab administrator can create rules that define the process for approving or rejecting tickets with the "Approval" status. Administrators can configure decision logic using conditions based on users, user roles, and logical operators (AND, OR). The system allows for the creation of multiple configurations, which can then be assigned to specific ticket types with the "Approval" status. In the created logic tree, administrators can specify how many users or what percentage of users in certain roles must approve or reject the ticket for it to change status. Tickets awaiting a decision are locked for editing until they are approved or rejected by the required number of users as per the configuration.

Important! The configuration is highly flexible, allowing it to meet even the most complex client requirements. However, there is a risk that incorrect logical conditions could result in no decision being made, leaving the ticket blocked. If your business processes allow it, consider adding a single user (e.g., the CEO) with permissions to make single-person decisions in exceptional cases.

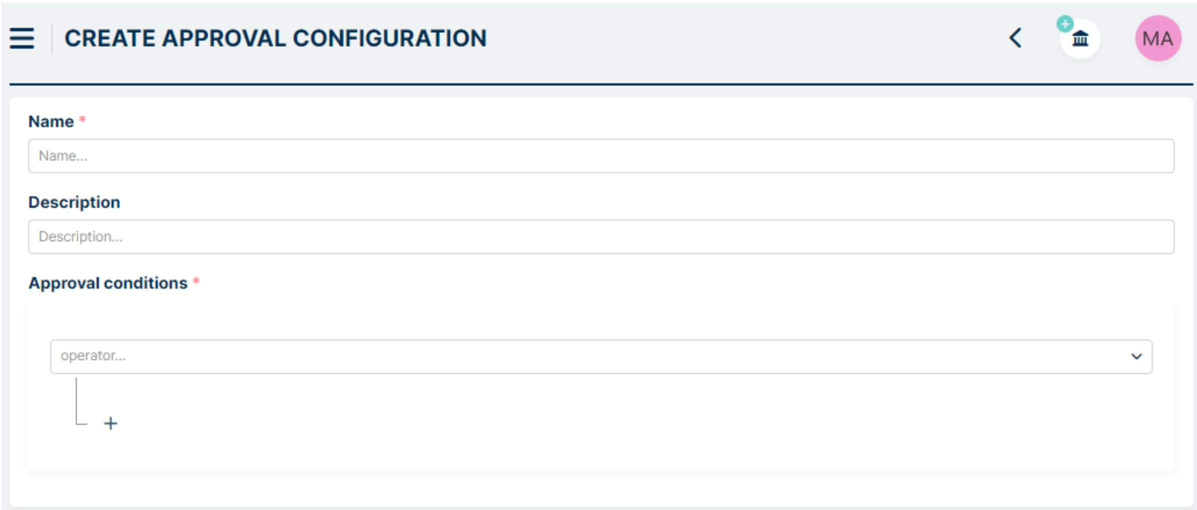
Upon accessing the tab, a table of configurations appears with the columns: Name, Description, and an Action column containing buttons to delete the selected configuration.



In the upper-right corner of the table, there is a panel containing a search field and buttons for Add Configuration, Search by, and Set Column Properties.



Clicking the Add Configuration button  opens a modal with the following fields:



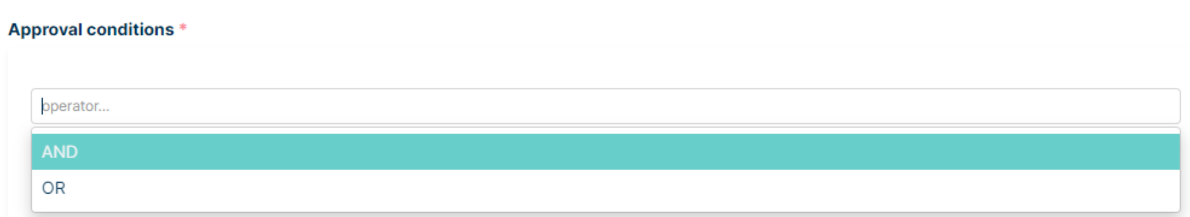
- **Name** - the configuration's name (required, must be unique)
- **Description** - a short description of the configuration
- **Approval conditions** - a required section where you build the logic structure, starting with a single Operator field.

The following options can be set in the Approval conditions configuration tree:

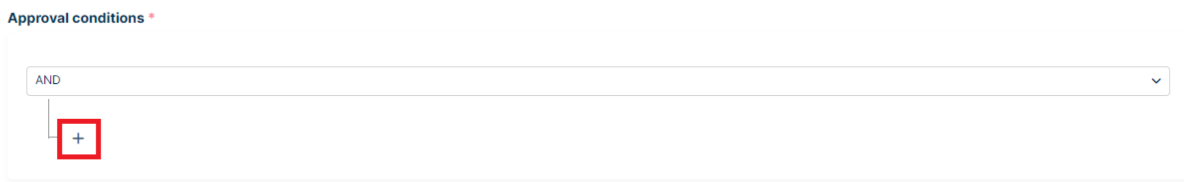
- **operator** – logic operator: AND, OR
- **user** - here can be selected Agent or Customer
- **role** - the selected Agent role
- **to be selected** - the Agent chooses himself who will be the decision-maker when the 'Pending approval' status is selected in ticket details
- **line manager** - the supervisor of the user assigned in the Customer field in the ticket details. Each user can set up his or her manager in his or her profile, and this can also be done by an Admin or - for Customer - an Agent.

The default branch structure starts with operator field:

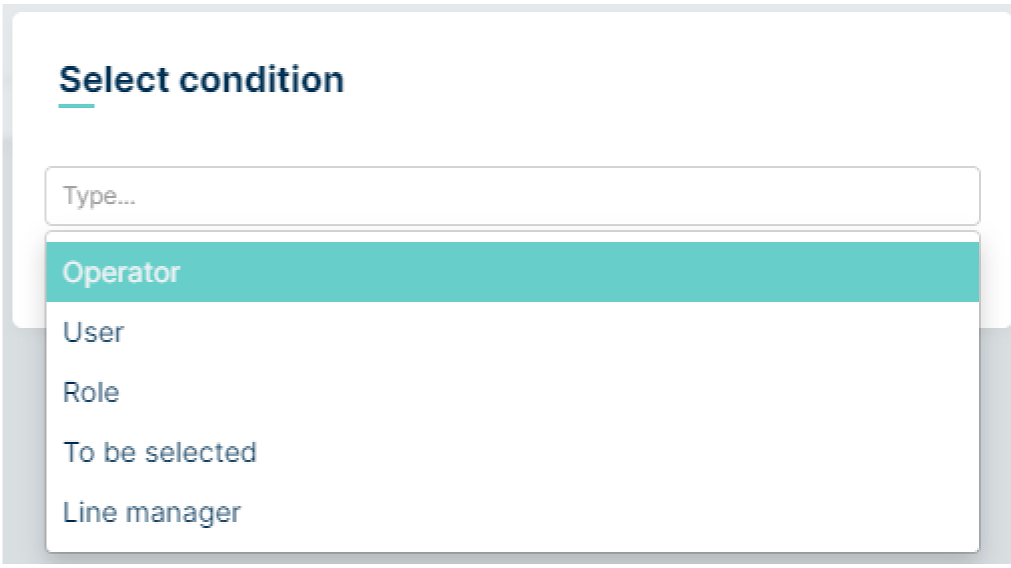
here you can choose AND or OR



After choosing operator, click PLUS icon to open modal with additional options



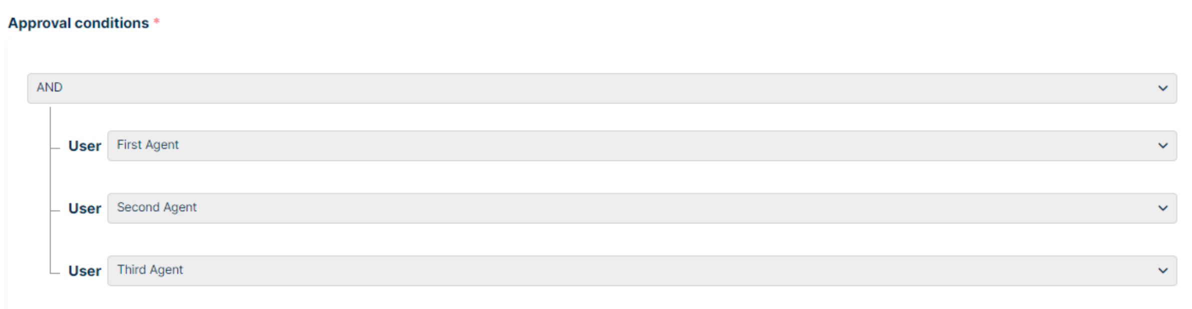
Here we can choose: another Operator, USER, ROLE, To Be Selected and Line Manager



Let's describe above options we can select:

Operator AND – this means that all conditions must be met/approved.

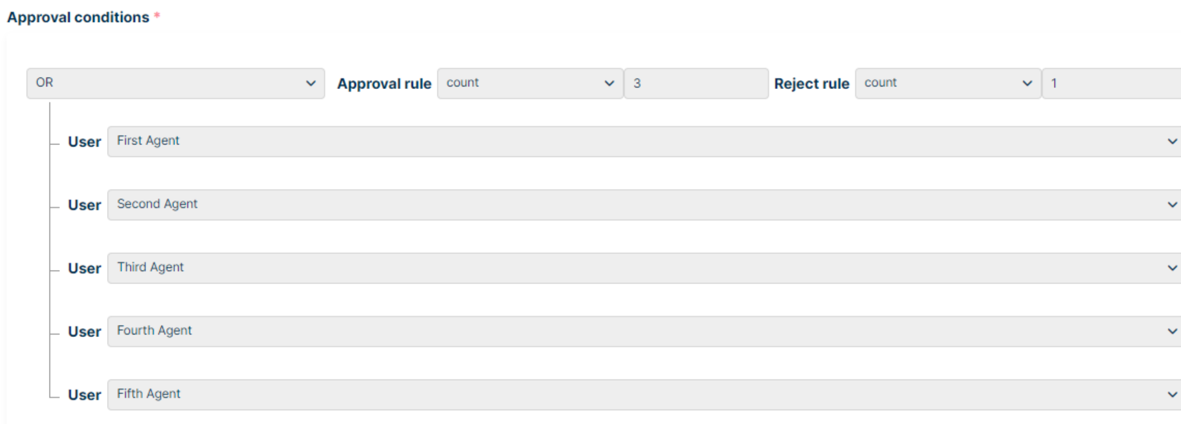
Example:



In the example above, the users First Agent, Second Agent, and Third Agent must all give a positive decision for the process status to be approved. If any of them issues a negative decision, the status will be marked as rejected.

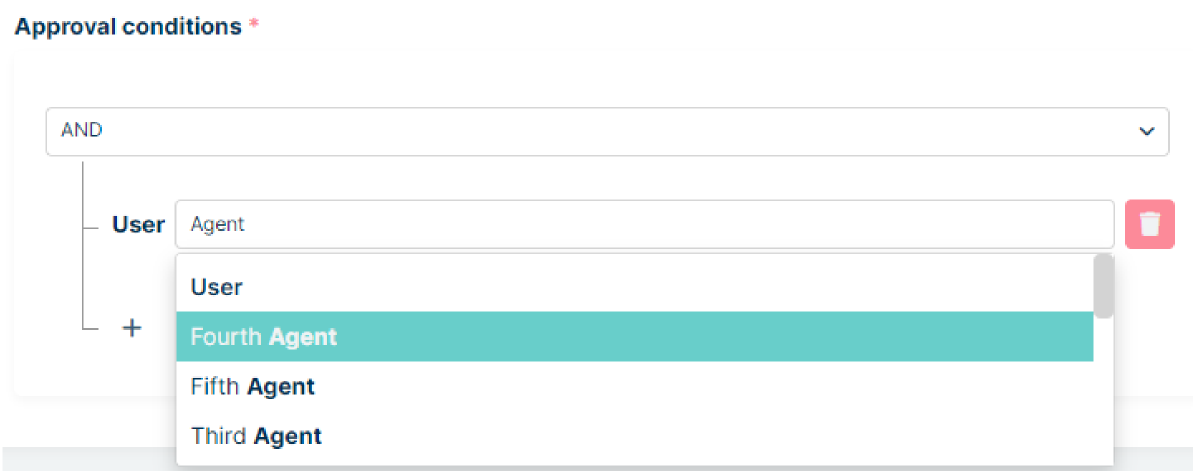
Operator OR – this means that one or more of the conditions must be met/approved. The number or percentage of required conditions is determined by the Approval Rule setting. Similarly, the number or percentage of negative decisions needed to reject the process is set in the Reject Rule.

Example:



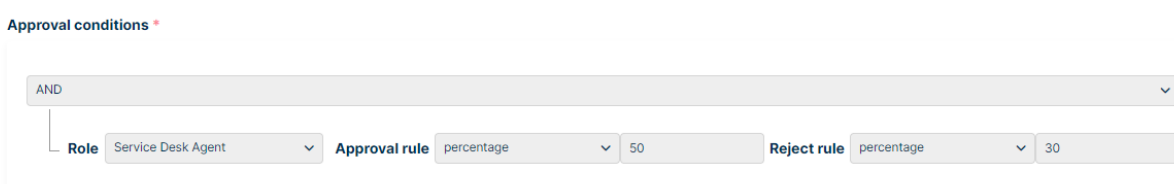
In the example above, it is set that three agents must give a positive decision for the process to be approved (Approval Rule set to 3). Conversely, the process will be rejected after one negative decision (Reject Rule set to 1).

User - here we can choose from all agent and customer users that we want to involve to the decision process.



Role - here we can choose the agent role that we want to involve to the decision process. The number or percentage of users from chosen role required to make positive decisions is determined by the Approval Rule setting. Similarly, the number or percentage of users making negative decisions required to reject a process is set in the reject rule.

Example:



In the example above, it is set that 50% agents from Service Desk Agent role must make positive decision for the process to be approved. Ticket will be rejected, if 30% of agents make negative decision

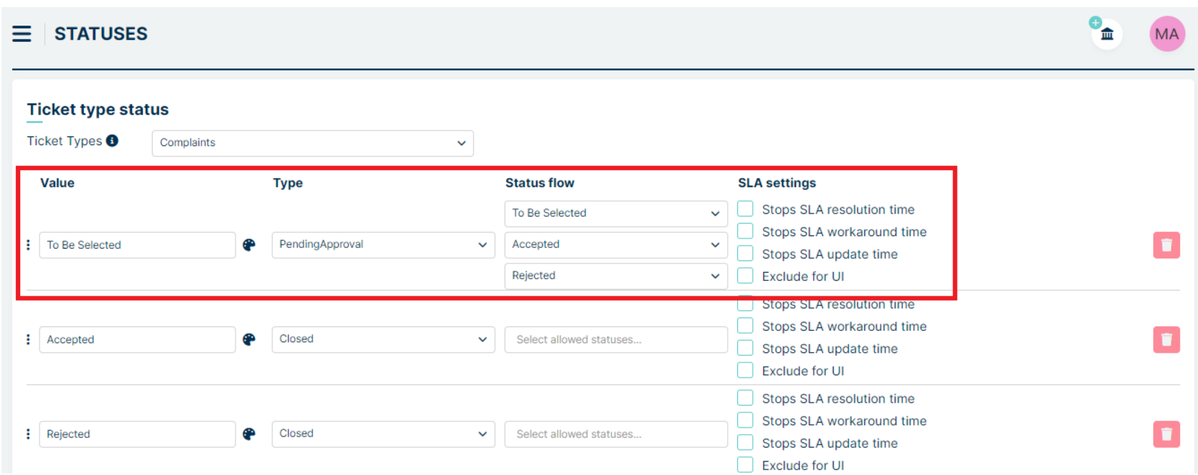
To be selected - selecting this option allows the agent to choose in ticket details the user (Agent or Customer) who will be the decision maker for this configuration branch. Only one 'To be selected' option can be selected per configuration. The possibility for the agent to select the user appears when the Pending Approval status is selected in the application with an assigned configuration containing the 'To be selected' option.

Example:

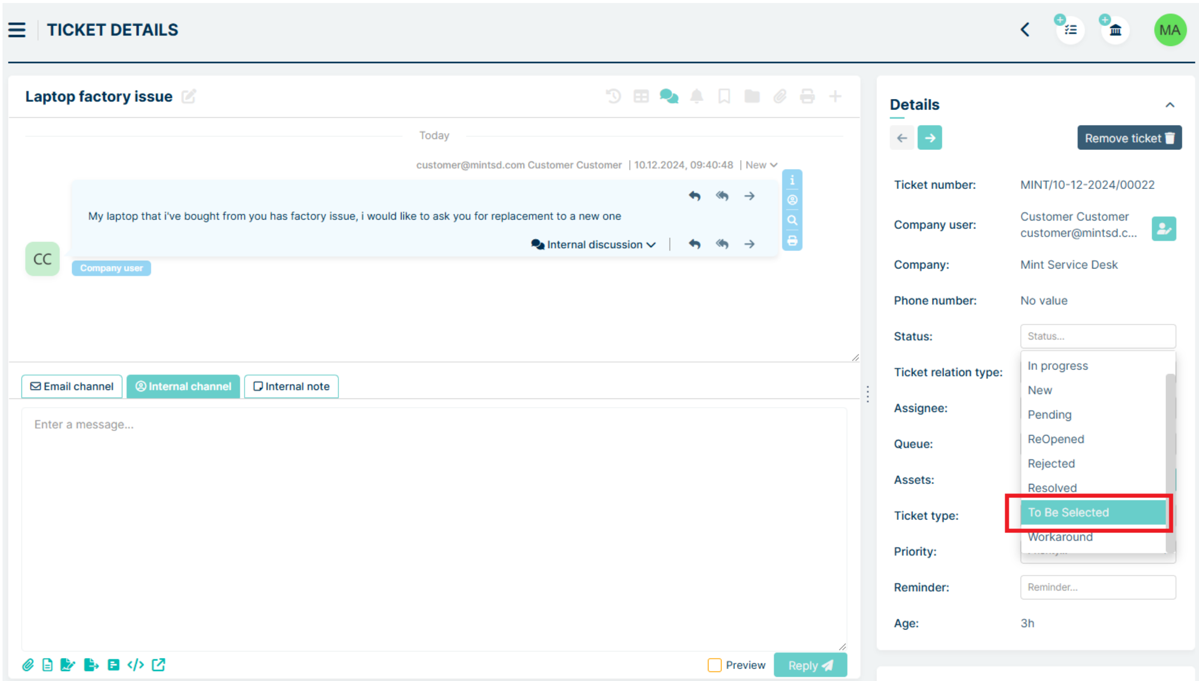
Admin created configuration like below

According to the above, two users are involved in the process - one is the First Agent and the other will be the user designated by the Agent.

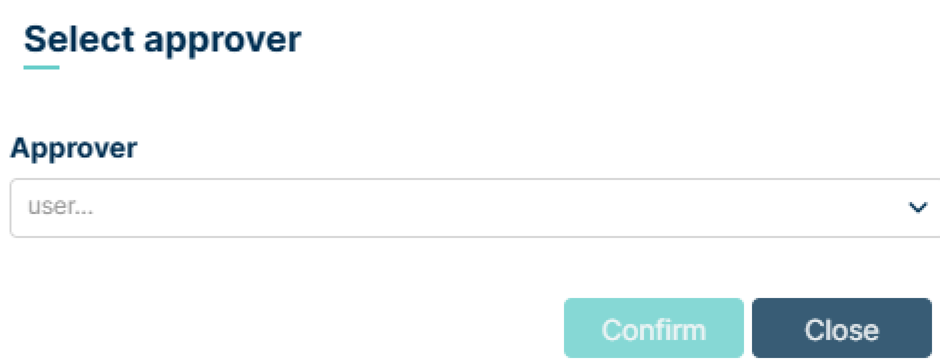
Next, Admin assigned above configuration to a new 'Pending Approval' status named: 'To Be Selected' (Assigning configurations to statuses is described *HERE*)



Now, Agent starts approval process by selecting status named: To Be Selected in ticket details.



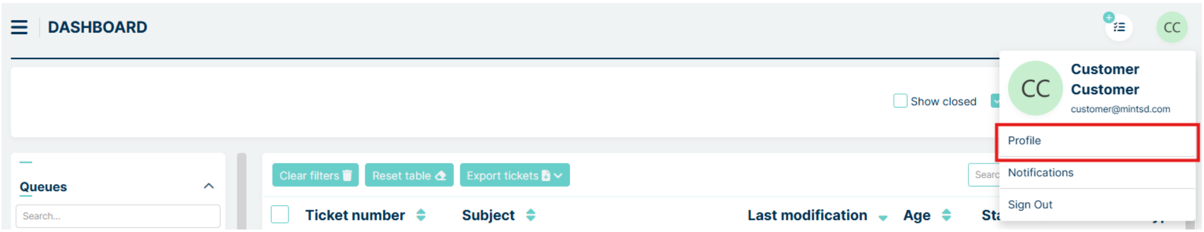
When this status is selected, a new modal appears



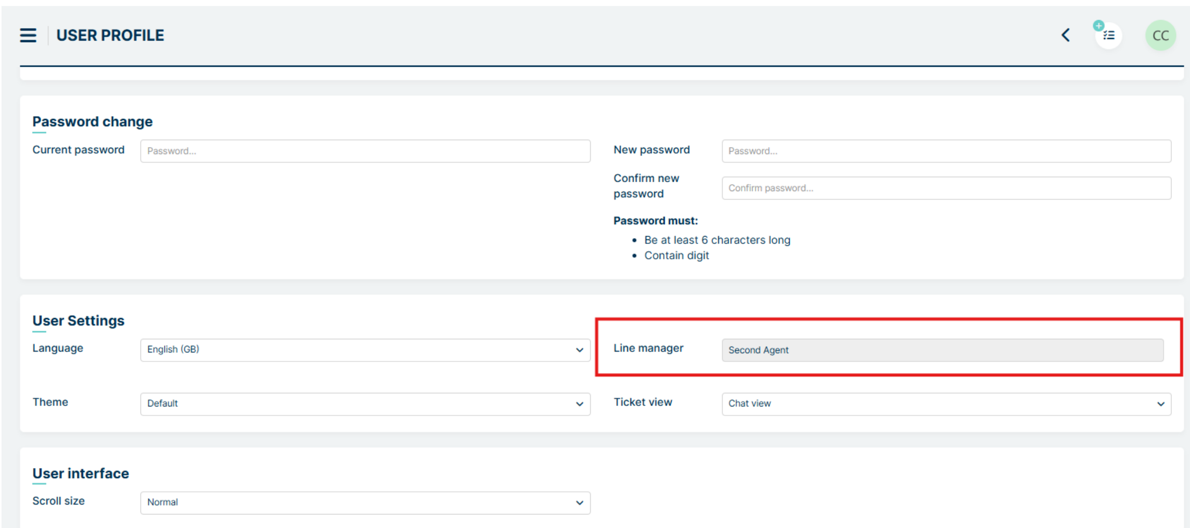
Agent chooses the user (Agent or Customer) who will participate in the decision process.

Line manager - Selecting this option adds a user to the decision-making process, who is the manager for the user creating the request.

The manager is added in the user profile:



in the 'Line Manager' field:

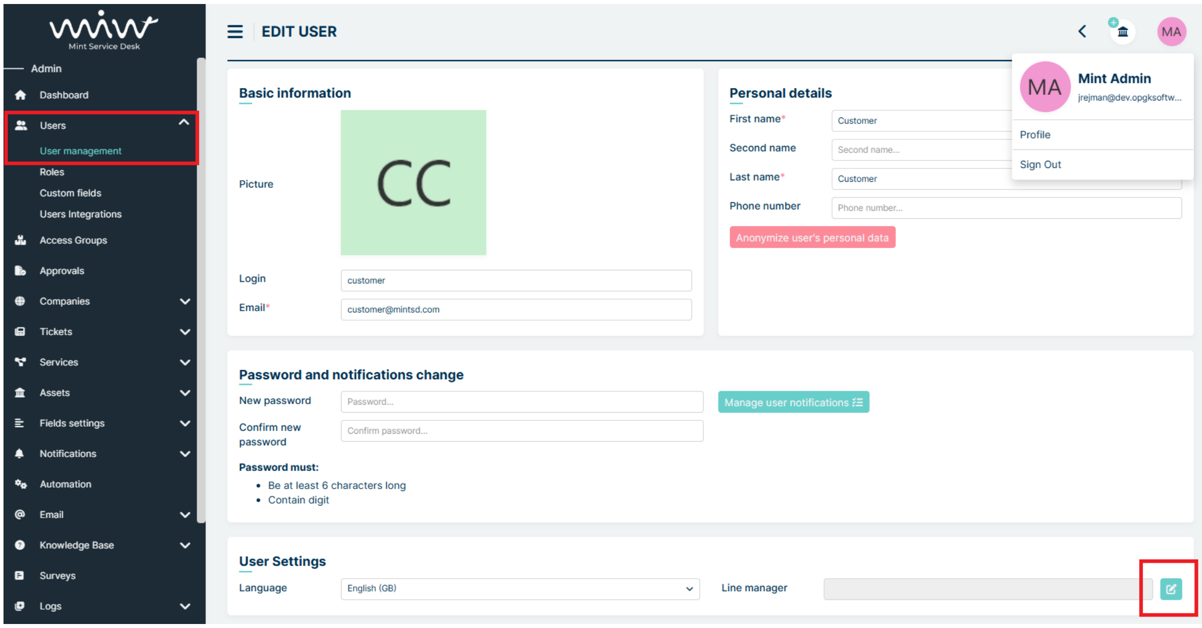


The line manager can be set up by Admin, Agent (with User management role) or via data from the user integration process (for example LDAP).

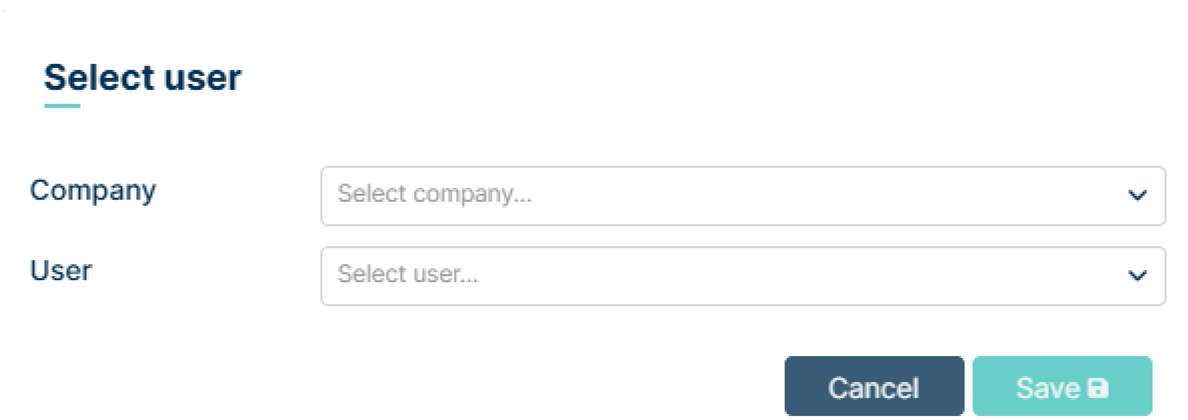
Example:

Admin would like to set up the Secondary Agent as the Line Manager of the user Customer

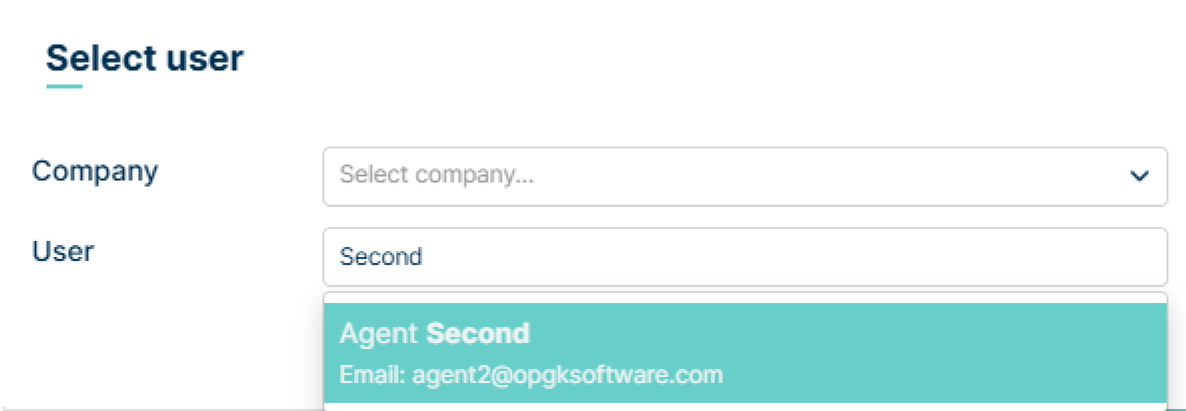
First we need to enter to Customer User profile by User Management section (editing of user data is described under Admin portal -> Users -> User management).



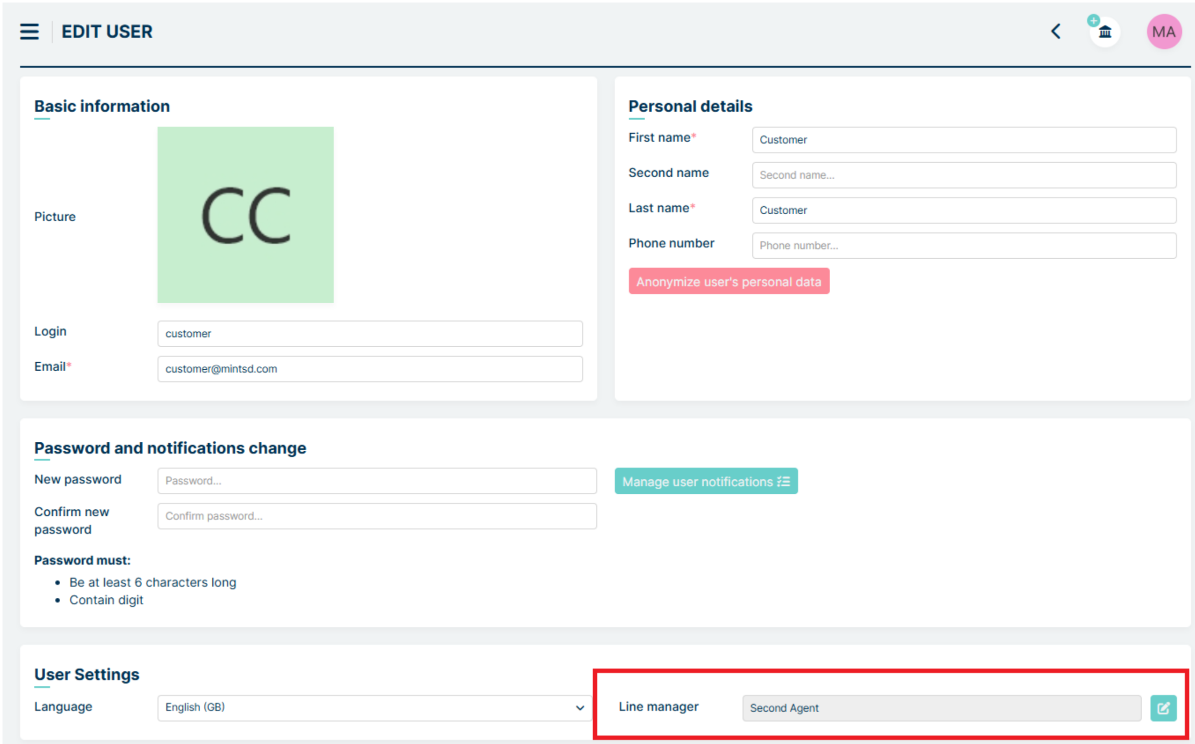
Clicking on the edit button opens a modal with the possibility of selecting the Agent or Customer who will be the Line Manager for the user whose profile we are in.



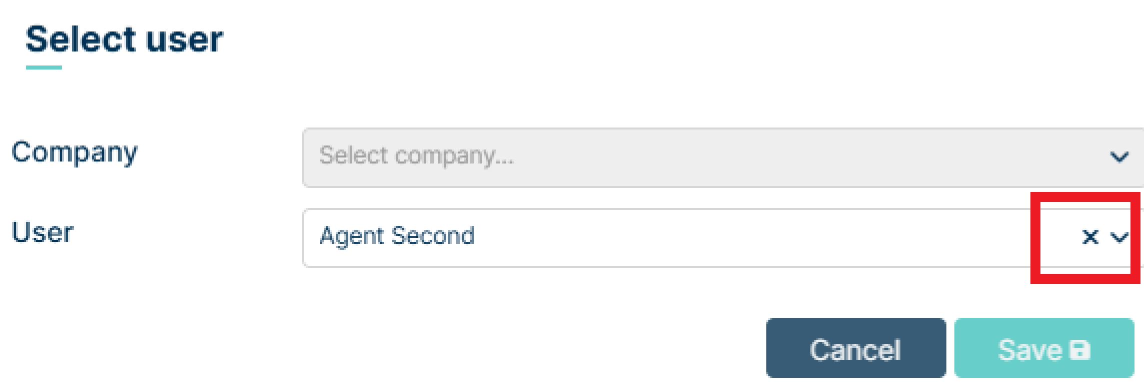
To select an Agent or Customer, click on the drop-down list called User and select the user or start typing their name



After choosing the Line Manager, press Save button. Line Manager has been set up.



We can also change or delete assigned Line Manager. Deleting a user can be done by clicking on the edit button, then deleting the current user with the 'x' button to the right of their name:

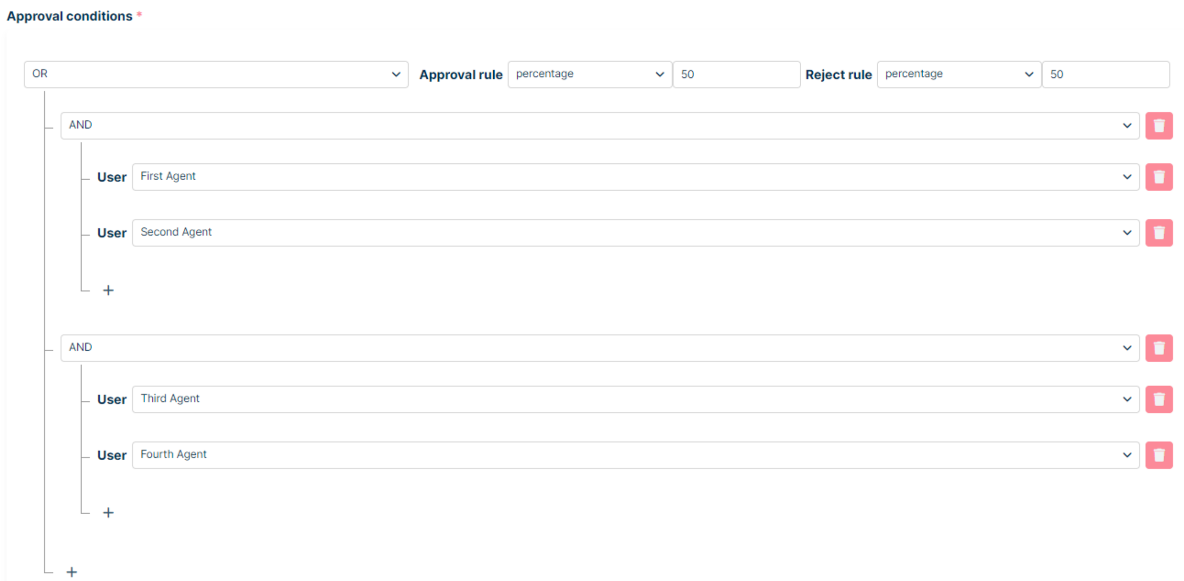


and then saving the changes with the Save button.

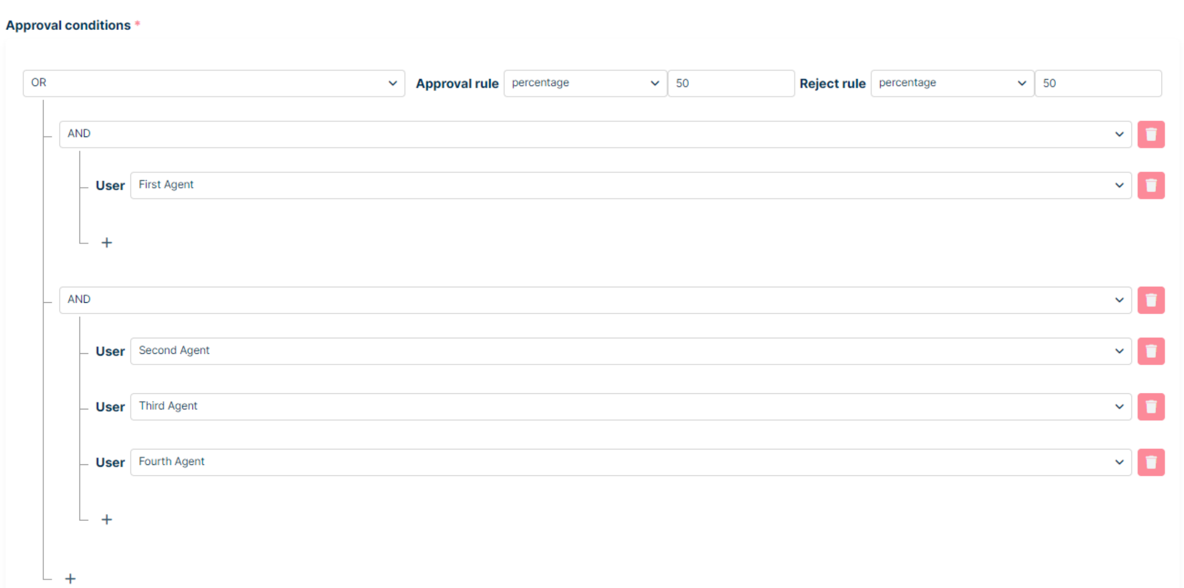
DRAG AND DROP

While creating new configuration, you can easily drag and drop any part of your tree, just simply click on branch you are interested to move and drag it to another place.

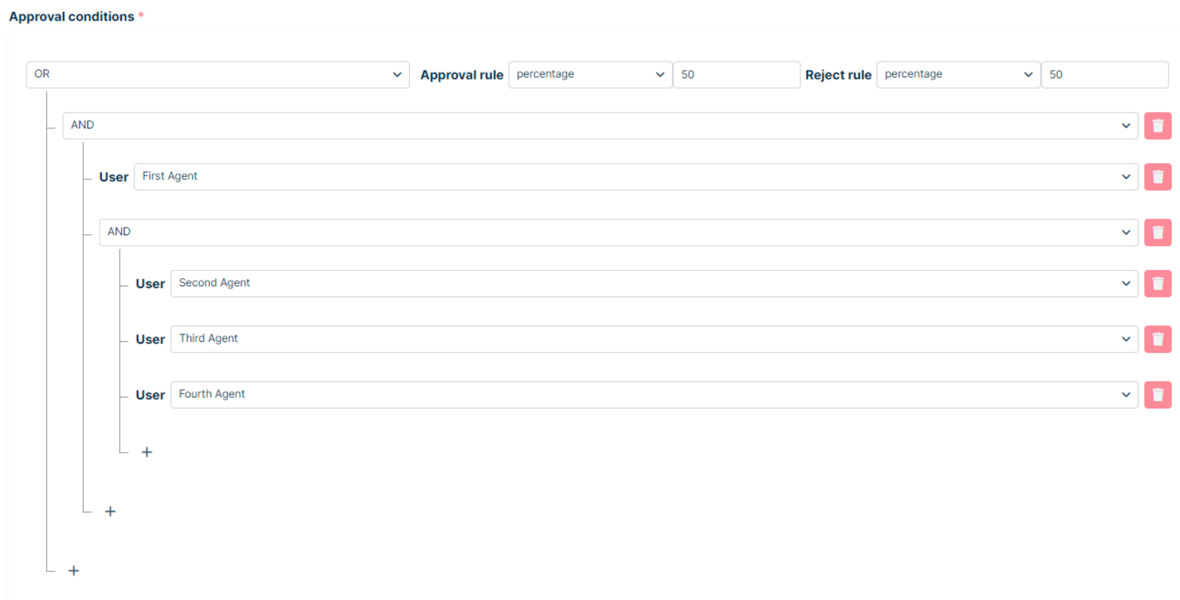
For example, you want to move First Agent from first branch to second:



Click and hold left mouse button at Second Agent and move it to second branch:

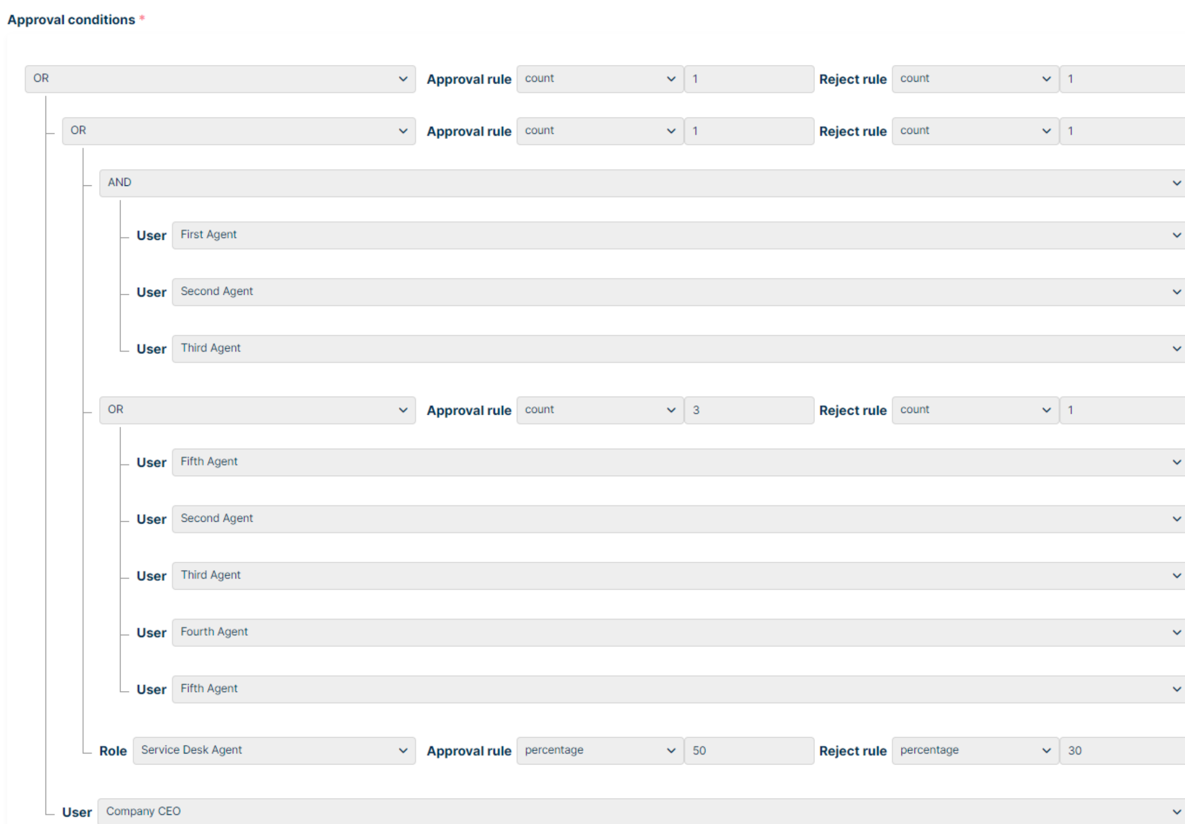


You can do the same with whole branch - for example, you want to put second operator **AND** to first. Click and hold left mouse button on first **AND** and drag it to place you want:

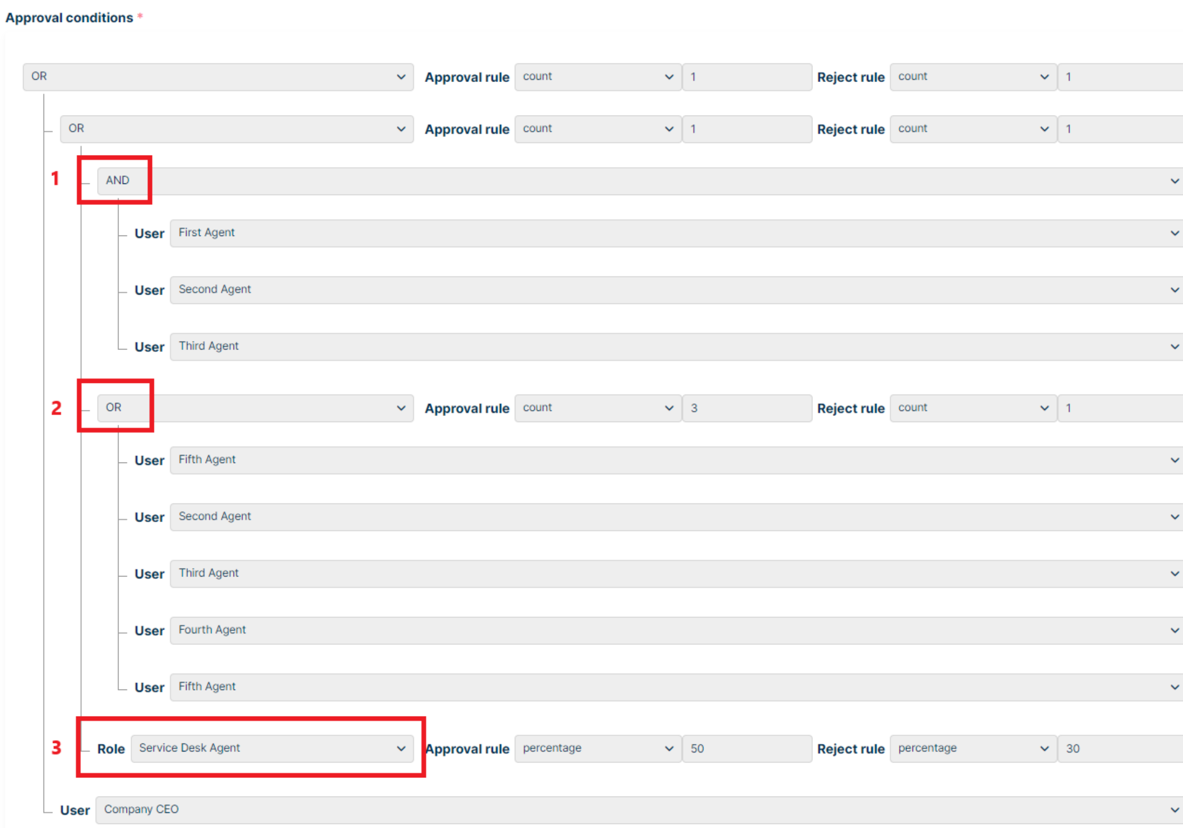


ADVANCED STRUCTURES

In the Approvals module of Mint Service Desk, we have the ability to create advanced structures with deeply nested logic. Below is an example of logic with nested operators and the option for approval by the CEO.



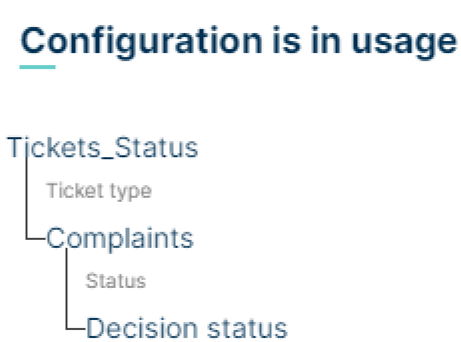
On the screen above, you can gain Approval or Reject for your ticket by three ways:



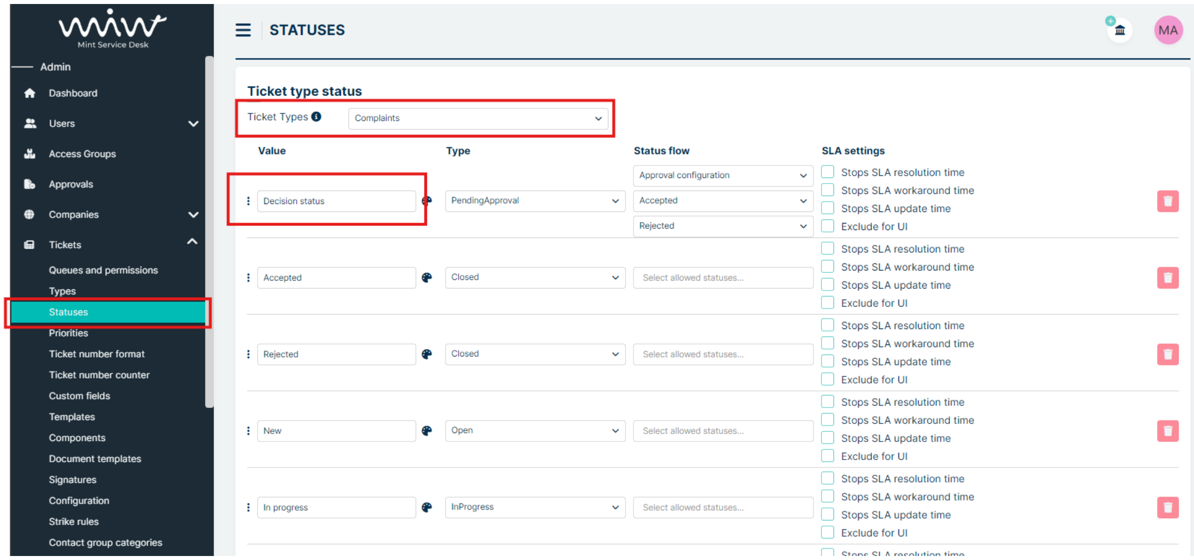
or you can ask the CEO for approve if for some reason none of branches you have set can give approve or reject path.

DELETING CONFIGURATION

The administrator has the possibility to delete any configuration, but it cannot be assigned to a status. However, if you try to delete an assigned configuration, you will receive the following message along with a path directing you to the specific status



This means that the configuration is used on the Tickets tab in the Status section, in the Ticket type called Complaints, in the status called Decision status



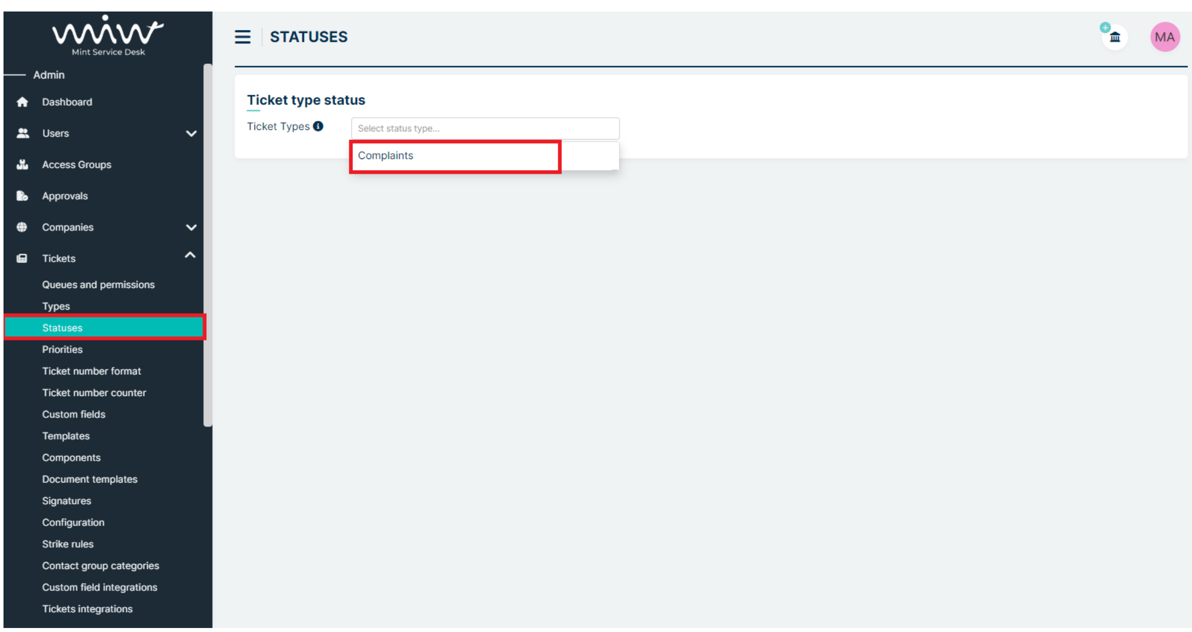
5.5.3 STATUSES

CONFIGURATION

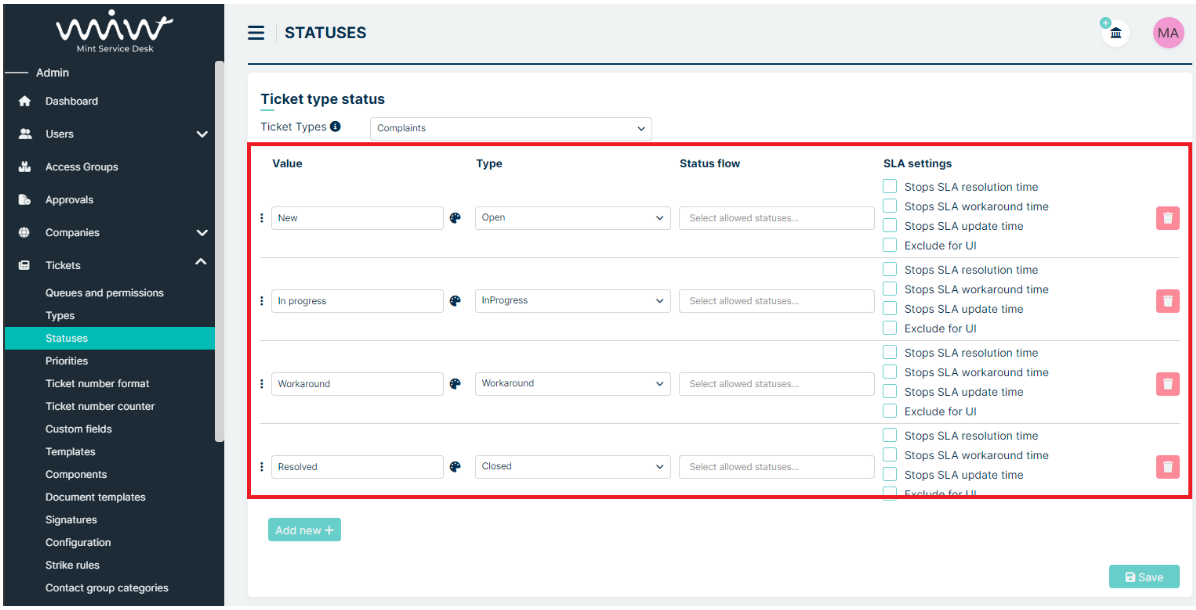
Admin can create and configure status type named: 'Pending approval'. To do this, the previously prepared approval configuration from the Approvals tab is needed. In Pending Approva status it is determined which status the ticket should change depending on whether the decision was positive or negative. The new status can be given any name, analogous to the name given to the others. It is possible to add several Pending Approval statuses and assign the same or different configuration to them.

More info about assigning configurations to statuses is described *HERE*

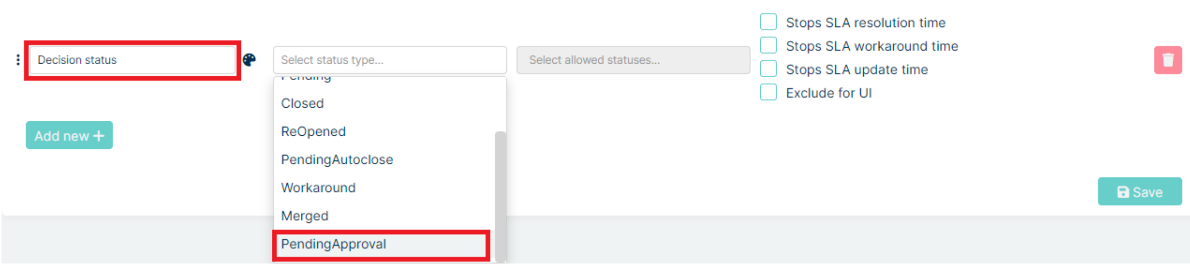
The configuration starts in Statuses section in Tictets tab. First step is to select ticket type we are interested (for example – Complaints).



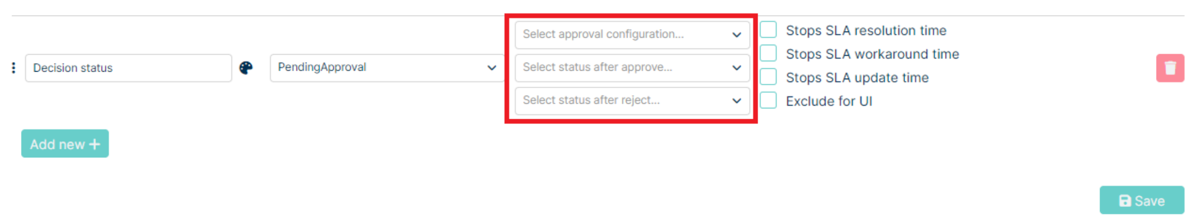
After choosing the ticket type we can see peviously added statuses



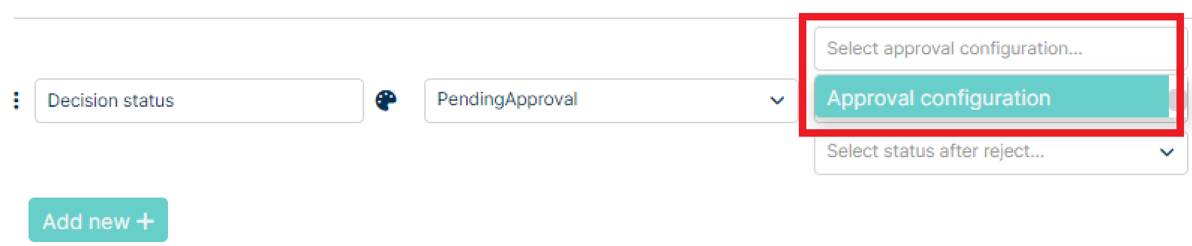
To create a Pending Approval status, we add a new status type using the Add New button, give it a name and select Pending Approval from the list of available statuses.



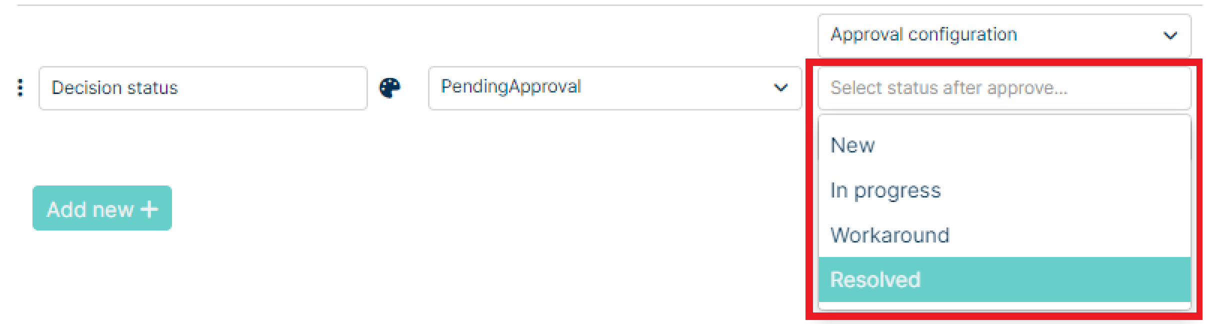
After selecting the status, a new section appears:



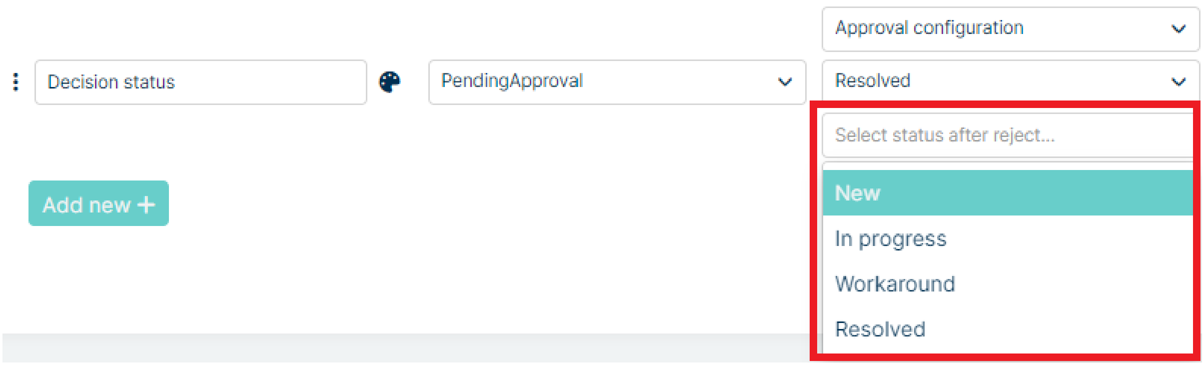
In the **Select approval configuration** field, we select the previously created configuration from the Approvals tab.



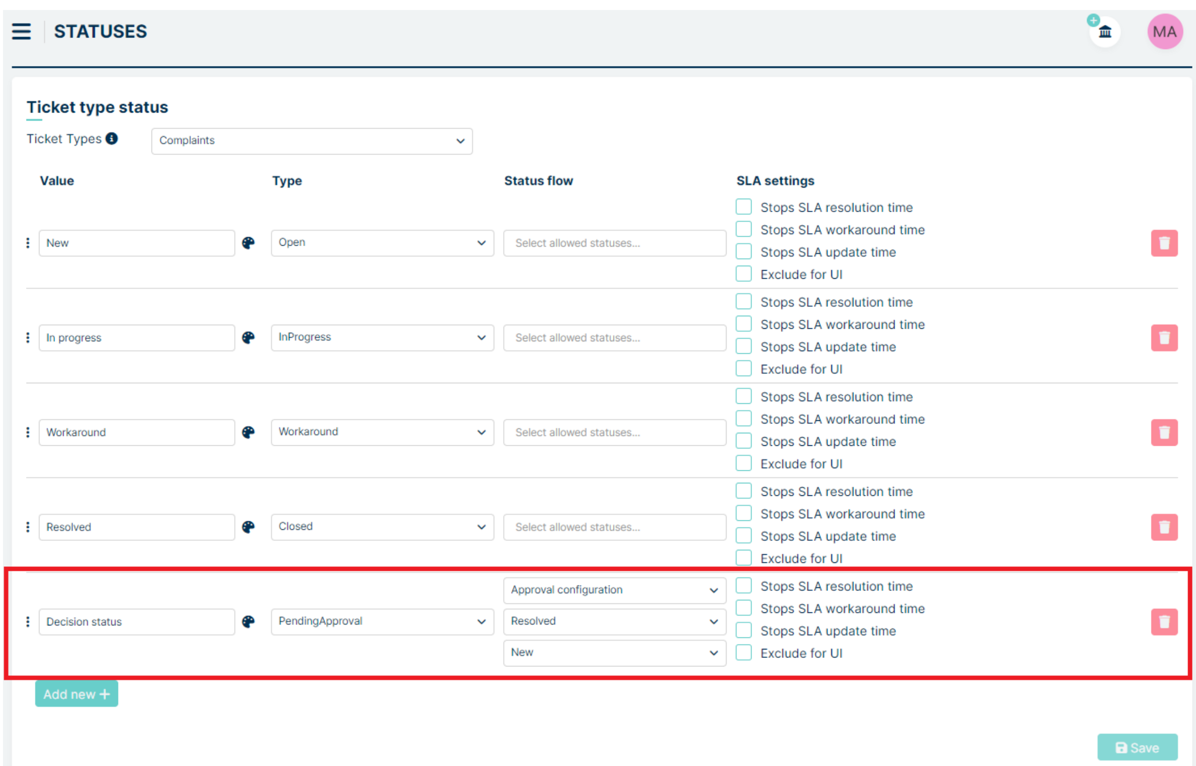
In the **Select status after approve** field, we select the status to which the ticket should change if it is approved.



In the field Select status after reject, select the status to which the ticket will be forwarded if it is rejected.



Once you have chosen your configuration and statuses, click Save button to save. Status is ready to use in ticket.

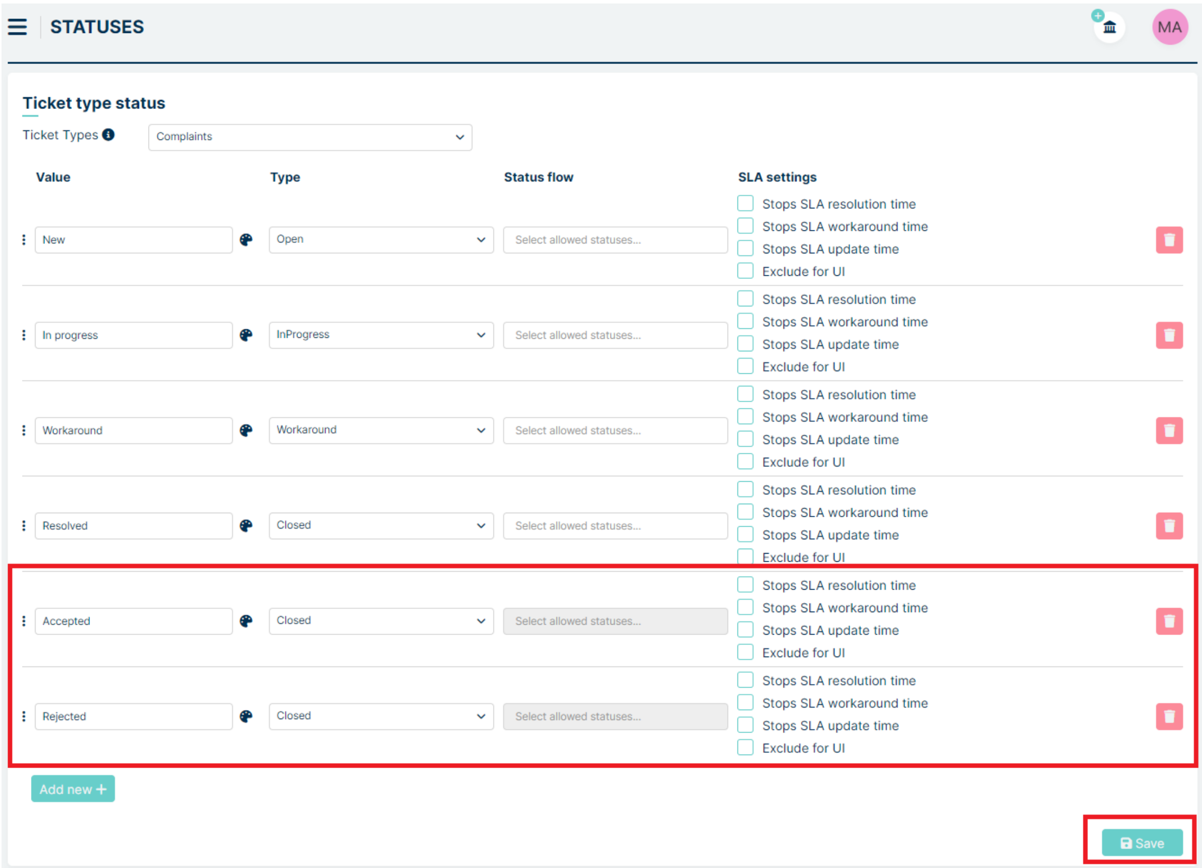


Important: If you want to use new, custom statuses in the **Select status after approve** and **Select status after reject** fields during configuration, you must configure and save them before adding the Pending Approval status.

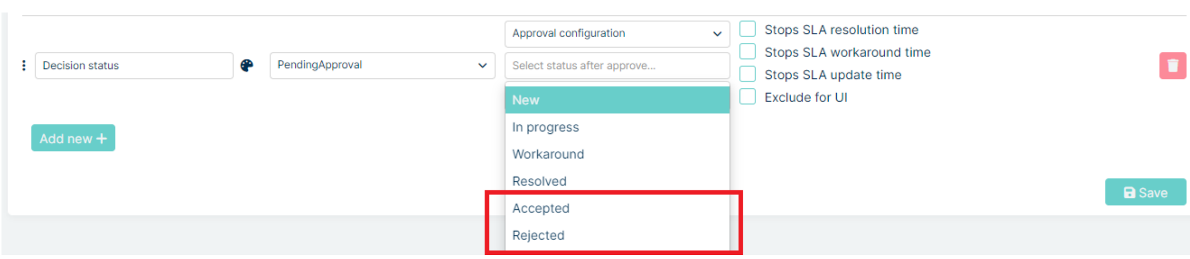
Example:

We want do add our custom statuses - Approved and Rejected, and connect them with Pending Approval status type

First we adding new statuses named Approved and Rejected, both with the type Closed and we saved it using the Save button.

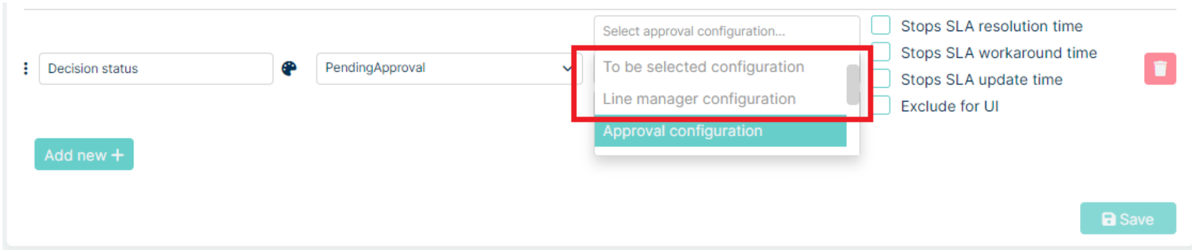


Now we can move on to creating the status Pending Approval. The new statuses will be available in the list



CONFIGURATION CHANGE

The administrator can change the saved configuration in the Select approval configuration field to another configuration. The exceptions are those configurations that include To Be Selected and Line Manager in the decision tree - such configurations will then be greyed out and not selectable.



If, after changing the assigned configuration, there are already requests in this status and some users have already issued a decision, their result will go to the new configuration provided that they are also involved in it as decision makers.

Example

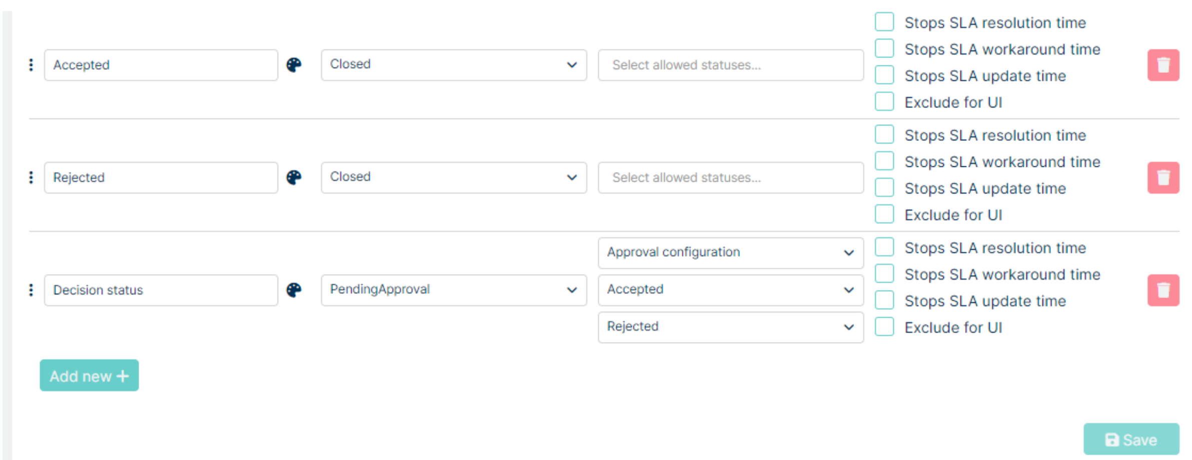
In Mint Service Desk there is a ticket in Pending Appoval status with a configuration requiring a decision from Agent 1 and Agent2. Agent 2 issues a decision. The administrator changes the configuration in the status to one that requires a decision from Agent 2 and Agent 3. Agent 2 no longer needs to issue a decision because he participated in the first configuration and it was already issued there. If there were several configuration changes, the decision succession will only cover the last configuration before the change.

DELETING STATUSES

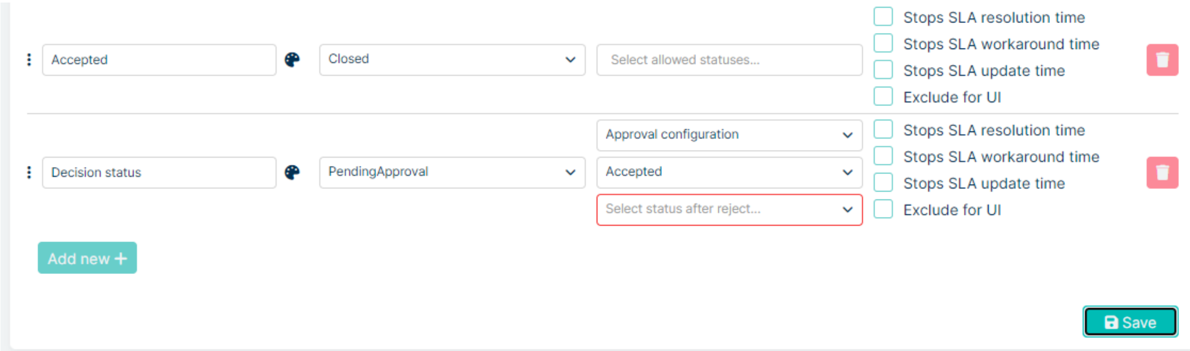
When an administrator attempts to delete a status associated with a Pending approval status, the associated fields **Select status after approve / Select status after reject** are becoming empty. It is then required to select a new status, otherwise the system will not allow the changes to be saved, highlighting the required fields.

Example

There are two statuses connected with Pending Approval status : Approve and Reject.



User deleted Reject status and tried to Save. Then the Select status after reject highlihted which mean that system requires to choose other status.



Deleting the Pending Approval status

The administrator can delete any status of type Pending Approval. After deleting, all tickets on that status are moved to the status that has been set before in the Select status after reject field.

5.5.4 NOTIFICATIONS

The administrator can set up notifications for actions related to notifications (see *HERE* for a detailed description of the notification configuration). In addition to the standard notifications, it is possible to configure notifications for actions related to the approval process, such as:

- **Ticket begining approval process** - the moment when the Agent transfers the ticket to the Pending Approval type status
- **Ticket approve** - the moment when a positive decision is issued for a ticket
- **Ticket reject** - the moment when a negative decision is issued for an application

Admin can set users, user roles and more as recipients of notifications. For the approval process, it is recommended to select Approvers in the Recipients section. This ensures that only those users who are involved in the approval process for a particular submission (are assigned to a particular configuration) will receive notifications.

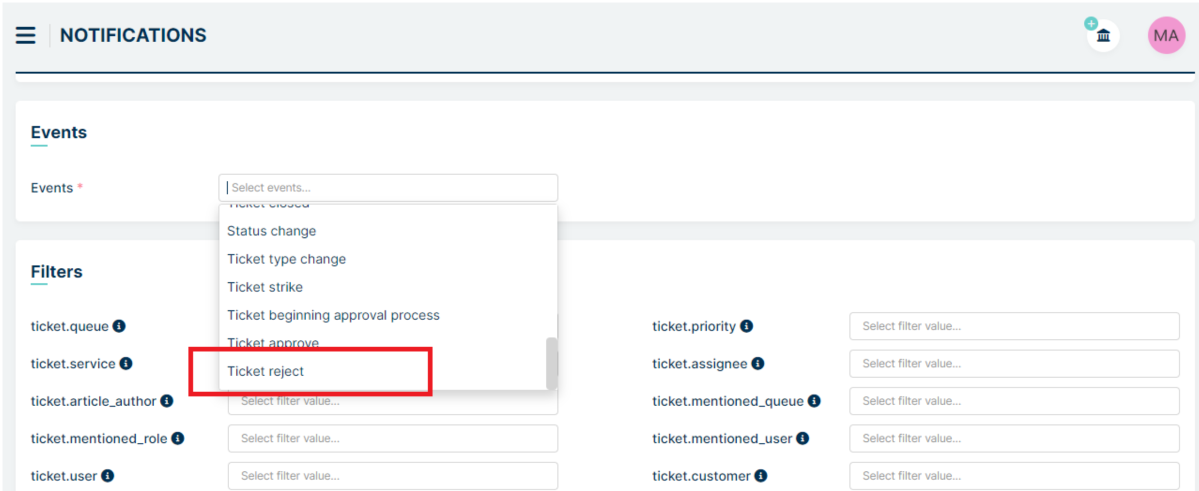
You can use so-called snippets in the content of the notifications. These are links to specific content or fields in the system. For the approval process, the snippet {{ApprovalLastRejectJustification}} is used in rejection notifications. Its use results in the notification receiving the content of the reason for the refusal of the last user issuing a negative decision, which was the reason for the refusal of the request.

Example:

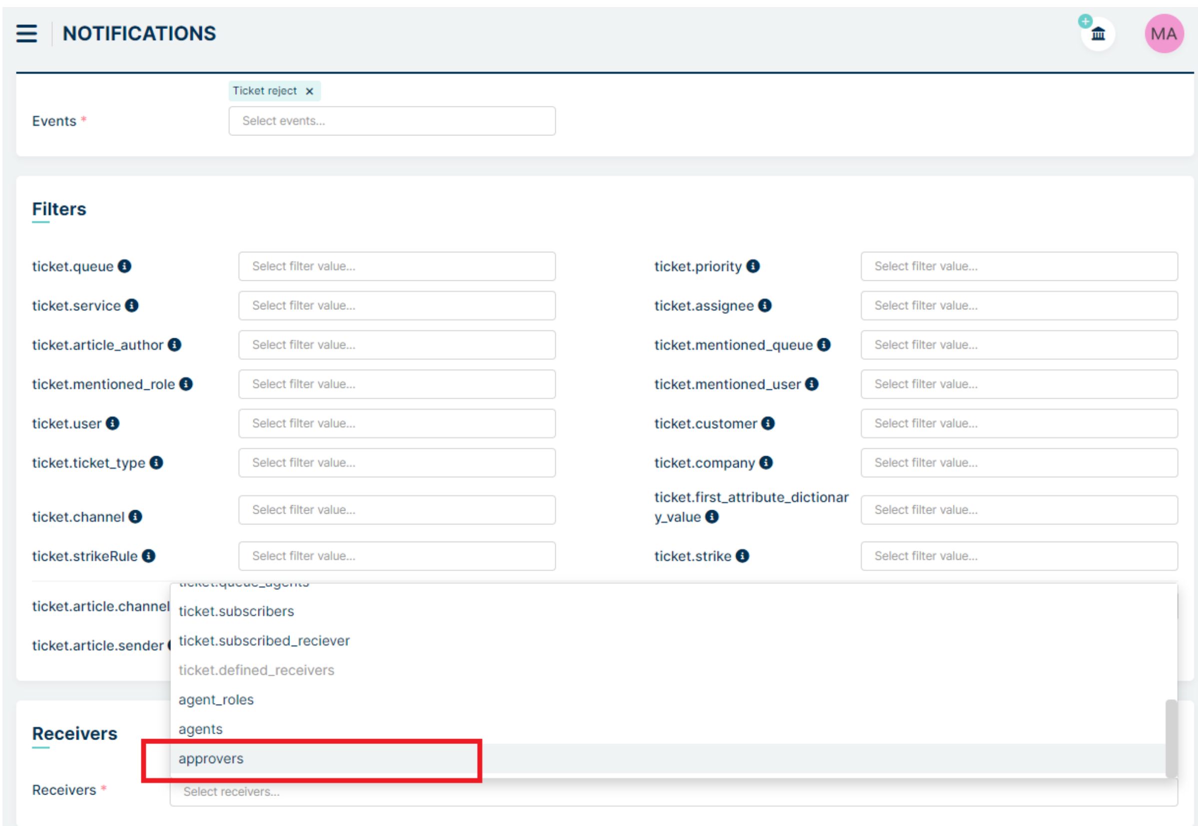
We want to create a rejection notification, informing users involved in acceptance processes via System channel. We also want to communicate the reason for the rejection of a particular ticket.

We go to the Notifications tab of the Tickets section and add a new notification using the PLUS button. We fill in the Name field and mark the notification as Active.

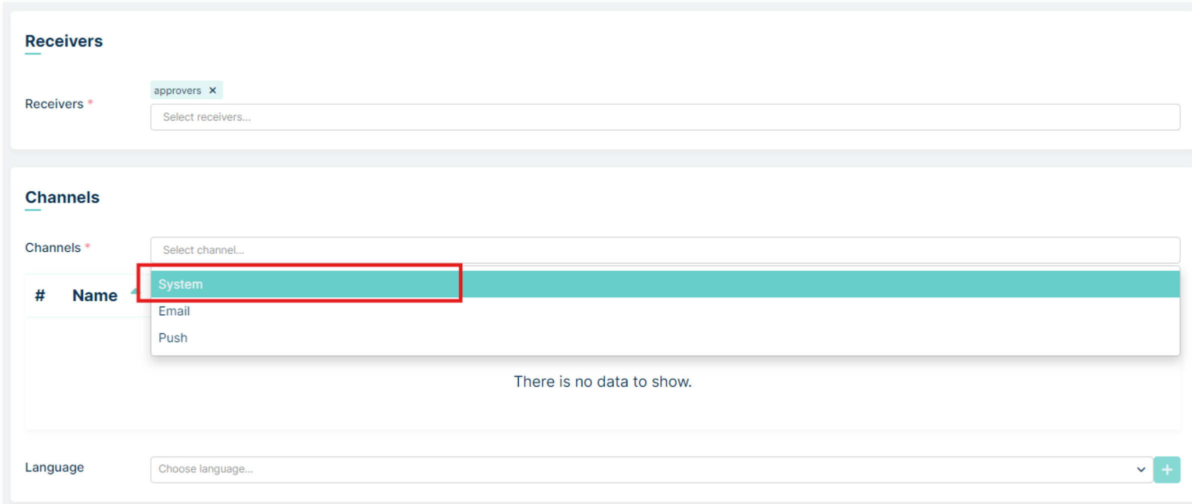
In the Events section, we select Ticket reject from the list.



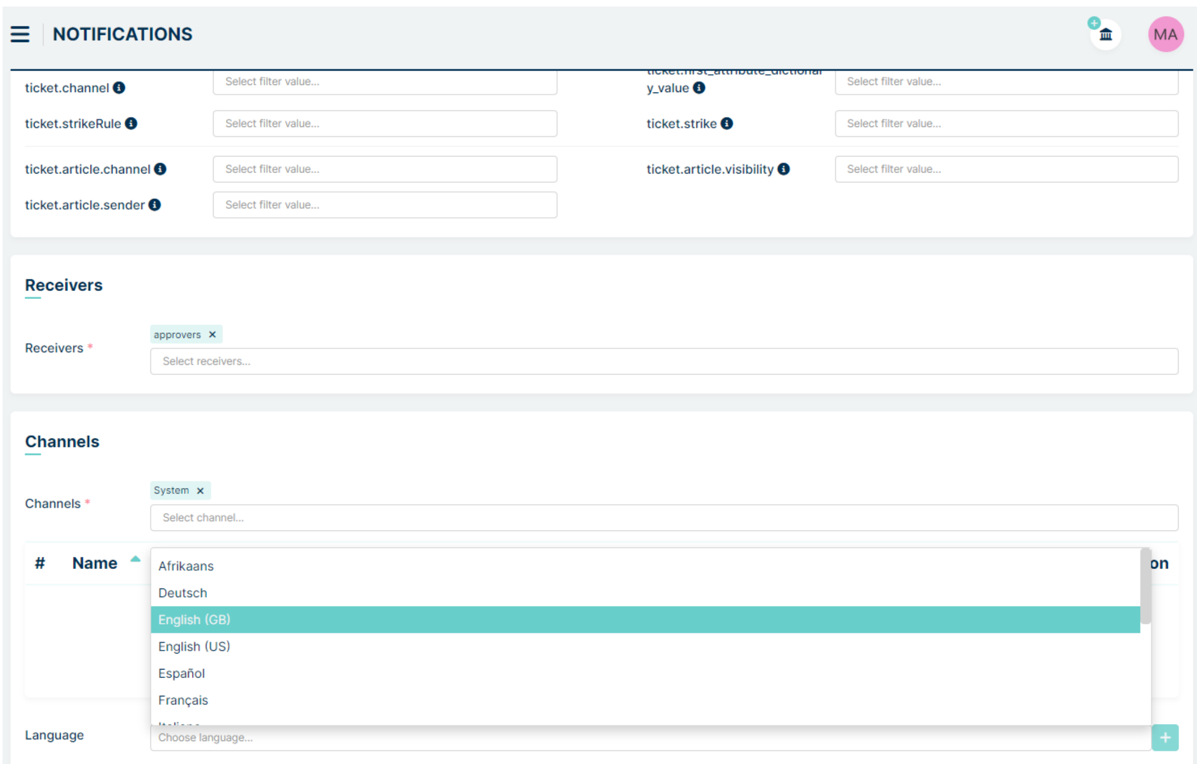
Go down to the Receivers section and select Approvers from the list.



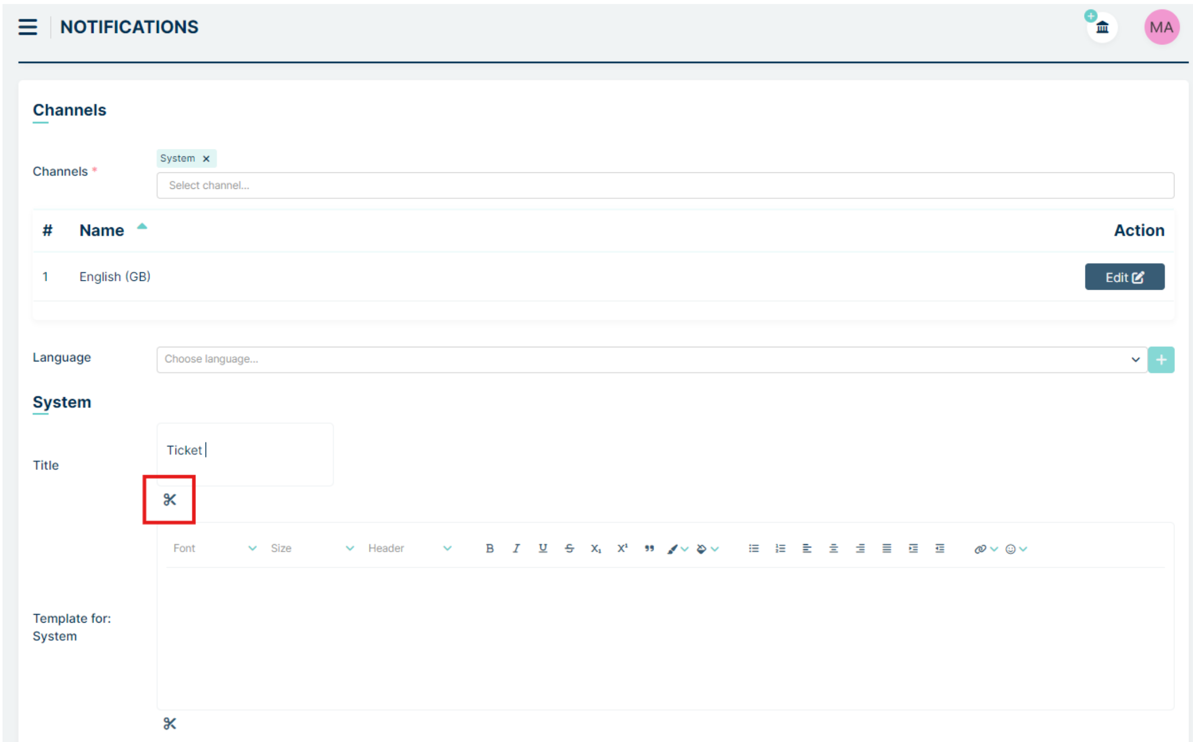
In the Channels section, select the channel for sending the notification: System



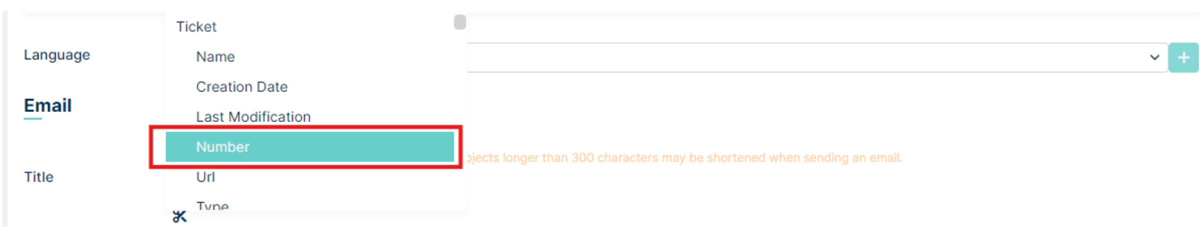
Select the language



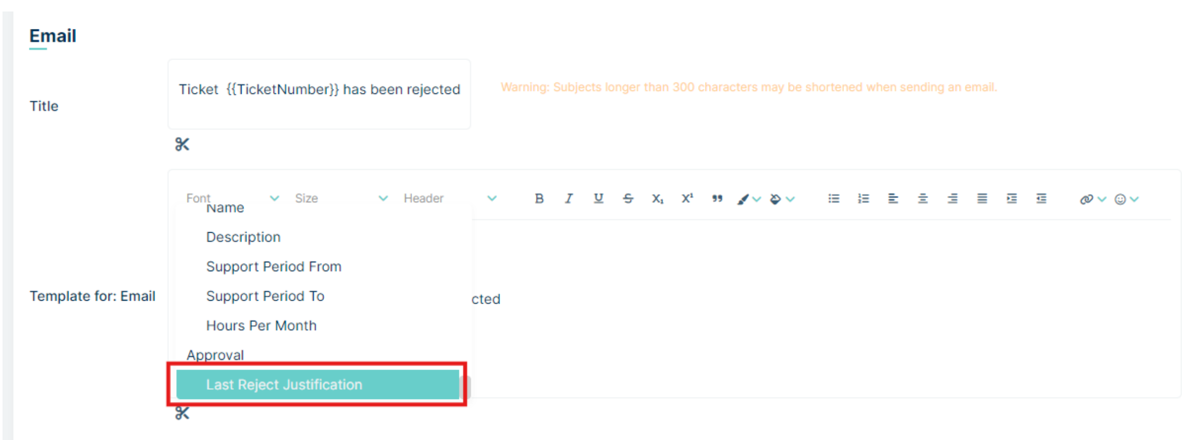
and add it using the plus button. The language will appear in the list. Click the Edit button, fill in the Title field (title of the notification). It is recommended to add the snippet {{TicketNumber}} from the scissors icon. Click the icon:



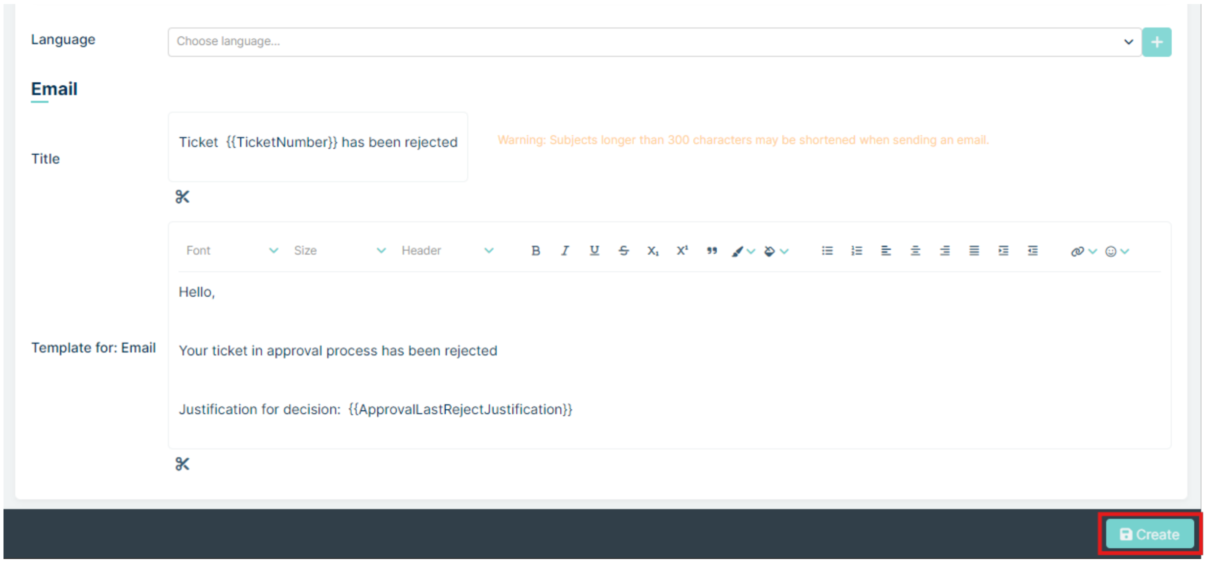
and select the snippet that will appear in the Title field



Then fill in the field Template for: system - enter the content and add the snippet {{ApprovalLastRejectJustification}}.

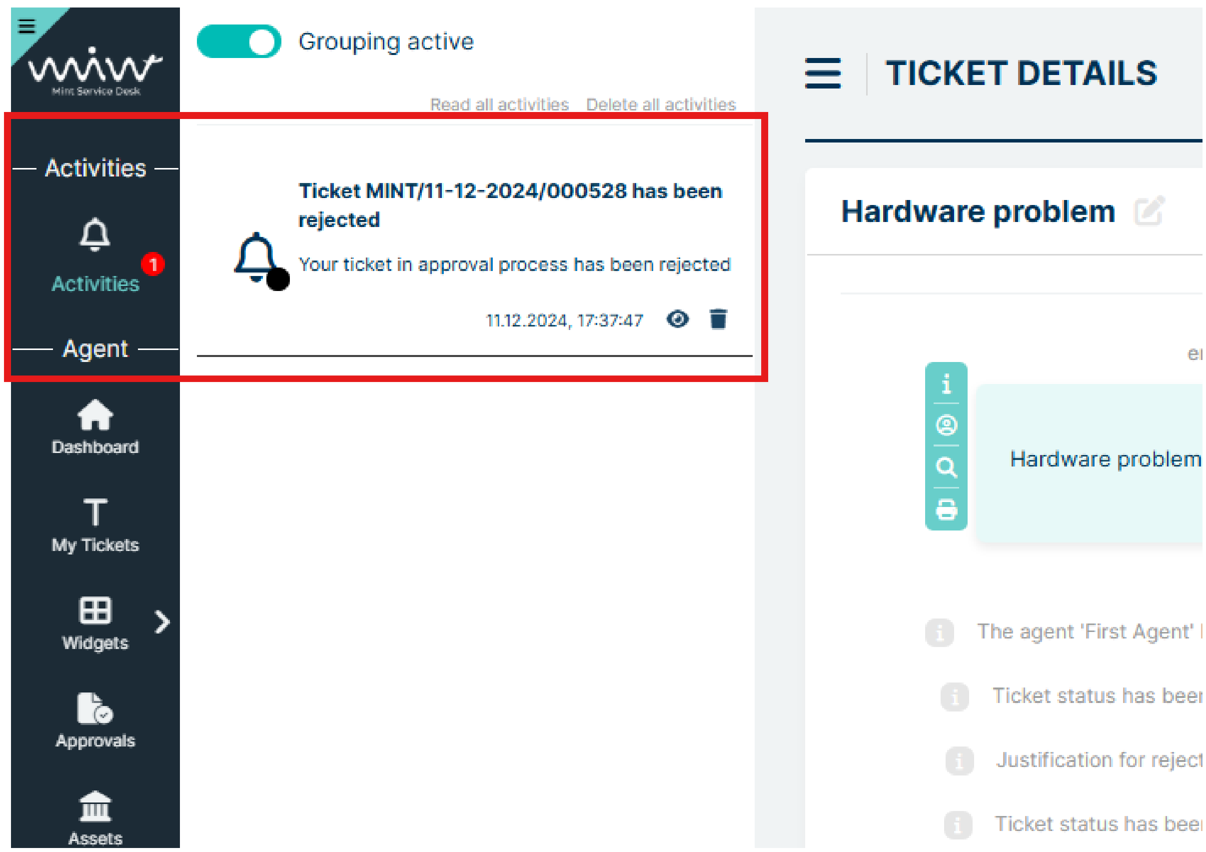


The last step is to click Create button.

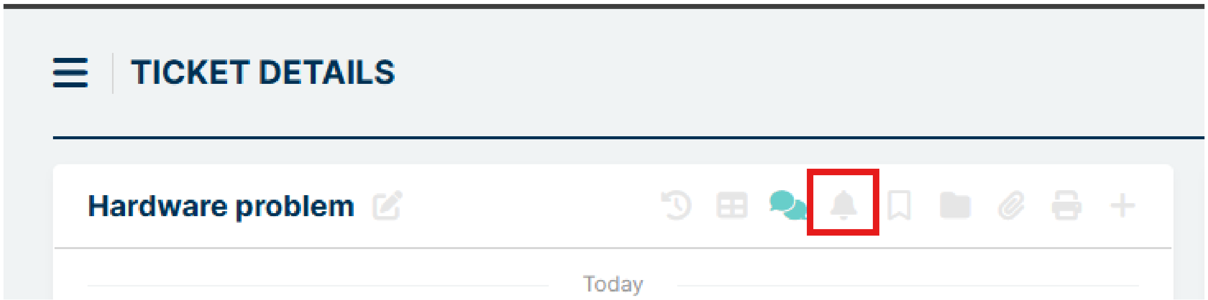


The notification has been created

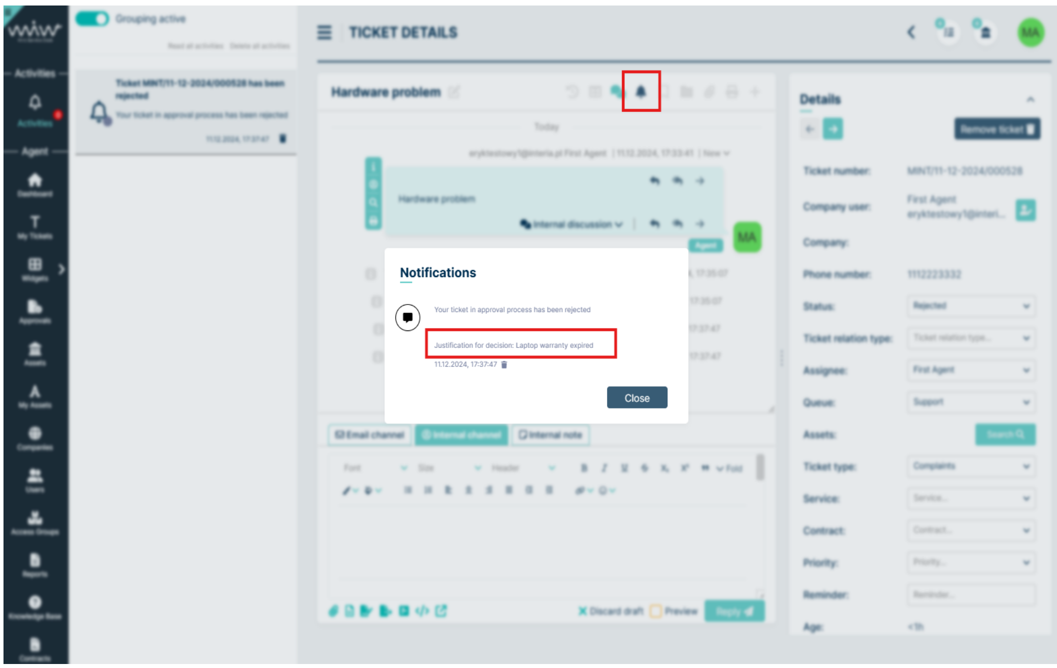
Now, when ticket wil be rejected, Agents involved in decision process will have notification in Activity section



Clicking on notification will redirect you to the ticket. Clicking on bell icon in ticket details:



will show full information about decision justification



5.5.5 AGENT/CUSTOMER PROFILE

Agents in the decision-making process are responsible for transferring the ticket to Pending Approval status, issuing decisions (if they participate in the configuration) and, if necessary, assigning Line Managers to users in the Customers role. The process is managed via the Approvals tab and directly in the ticket details. The following section describes these two views in more detail.

Customers are responsible only for issuing decisions (if they participate in the configuration)

APPROVALS TAB

In order to introduce the ability to manage tickets, an additional tab called Approvals has been introduced in the Agent and Customer profiles. It can be accessed from the sidebar.

The tab consists of three views:

- My Requests

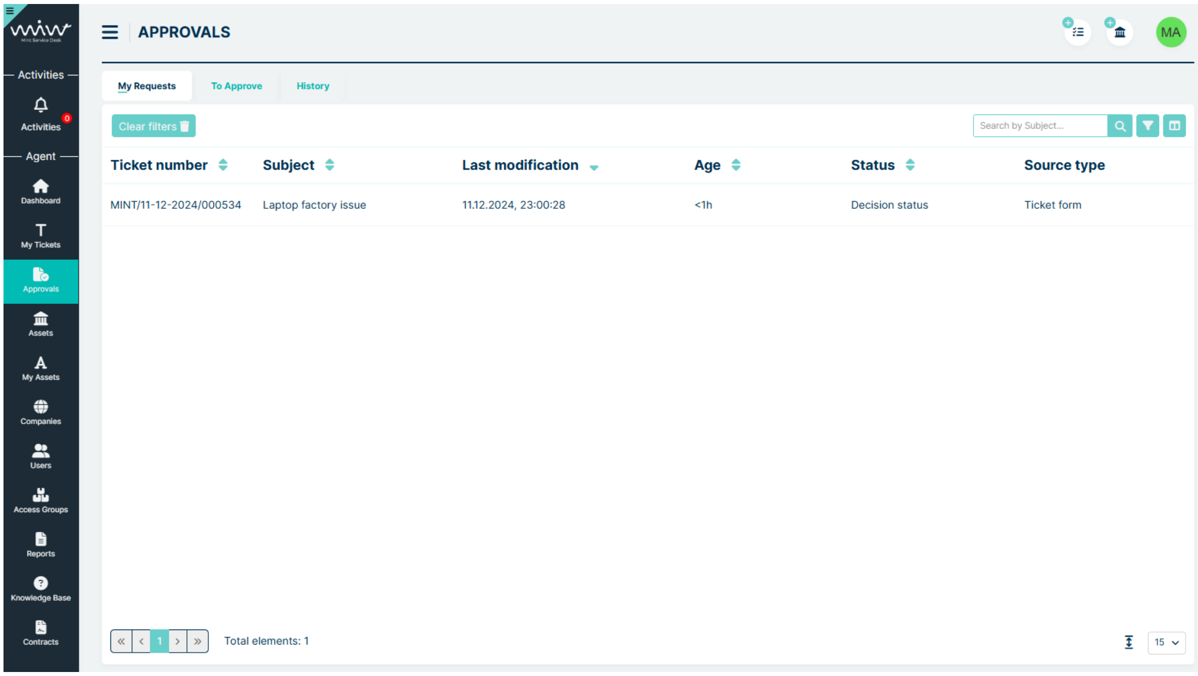
- To Approve

- History

Management of the views is similar to that on the Dashboard tab, so we can add and sort columns, search for tickets via Search by field, sort columns and reset the settings to default with the Clear Filters button.

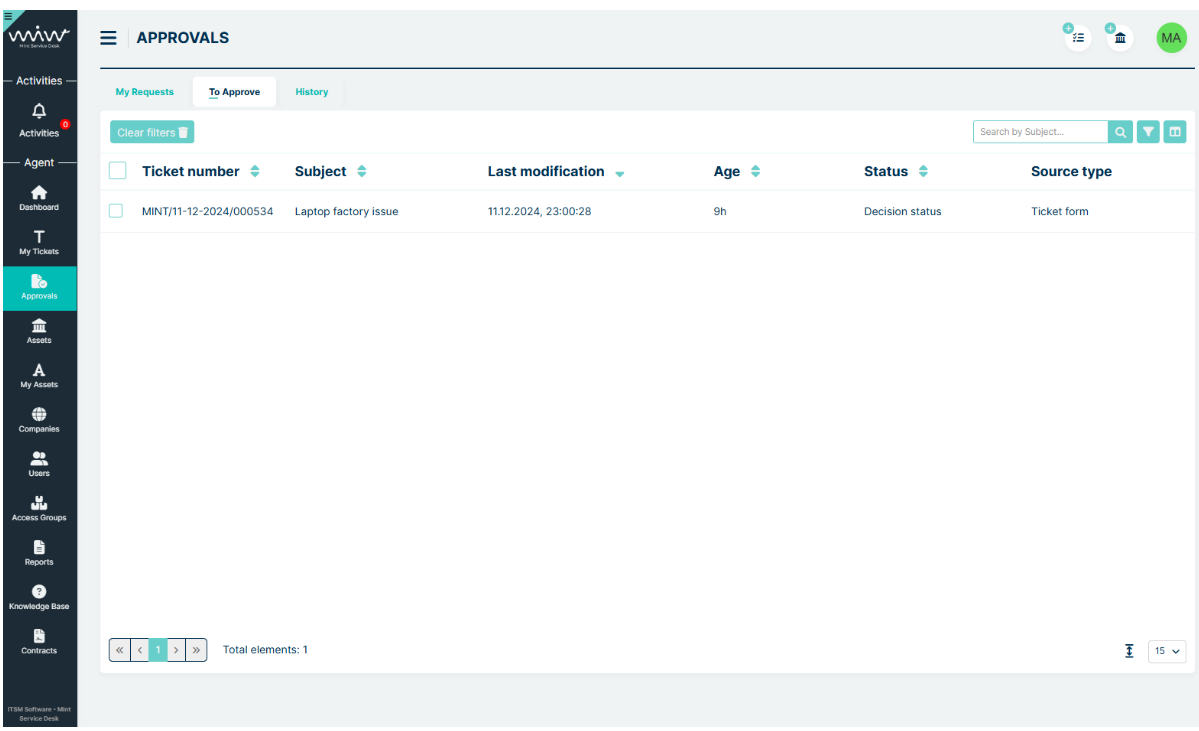
My Requests

This view shows the submitted tickets that are awaiting for decision (Approve/Reject). Tickets are visible only for user assigned in "Customer" field in ticket details. This view refreshes automatically after a decision is made in any of the displayed tickets.

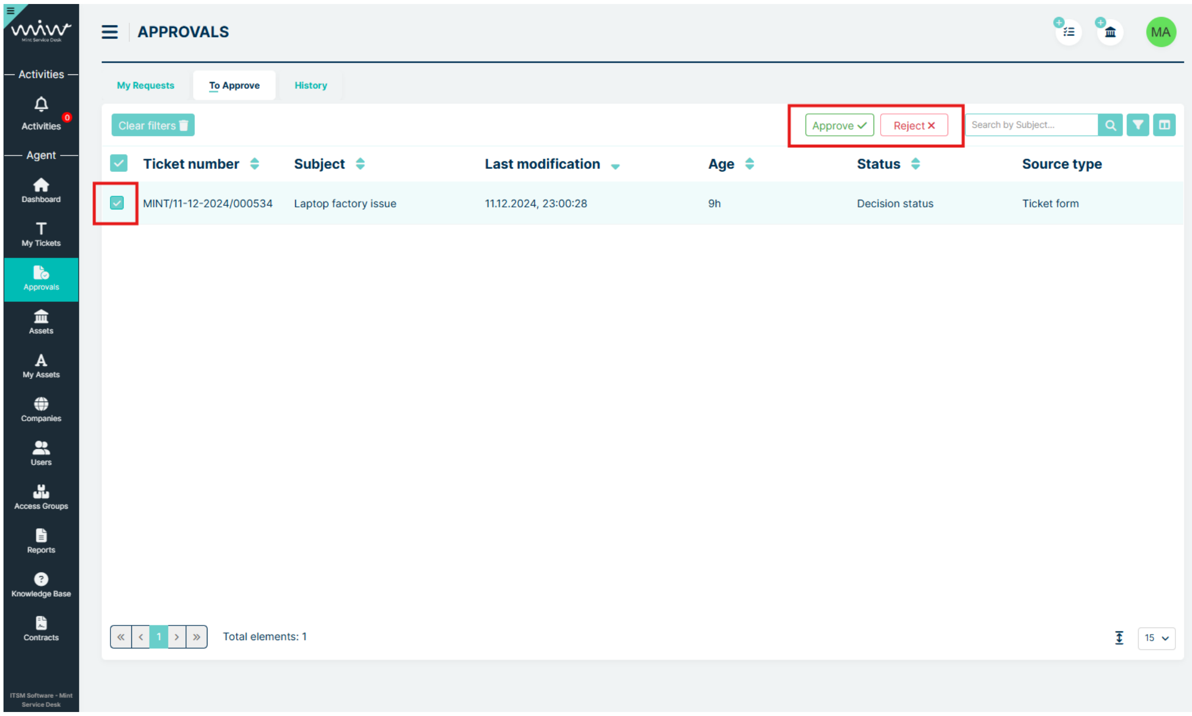


To Approve

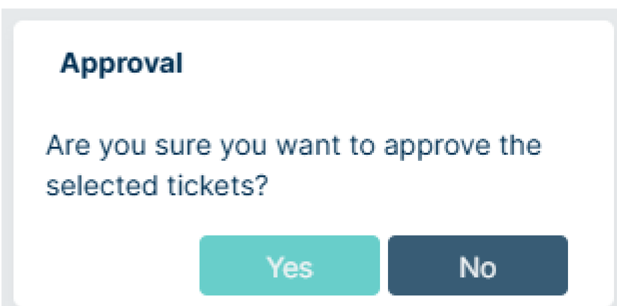
This view shows tickets awaiting decisions in which the user is a participant (decision-maker) .



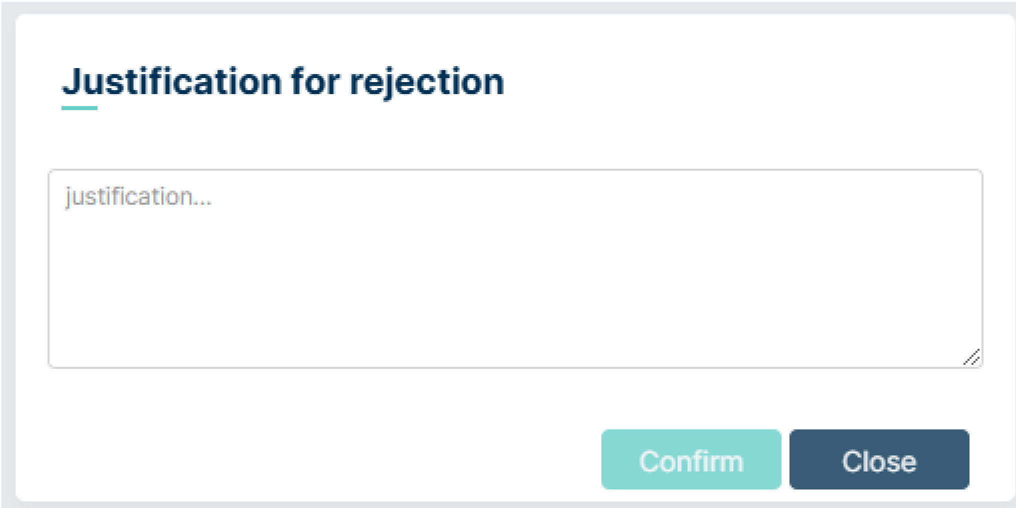
The table of tickets refreshes automatically both when new ticket for a user's decision appears in the system and when the user has made a decision (the notification then disappears from this tab). This view also has the option of selecting tickets. Once they have been selected, two buttons appear (Approve/Reject) with which the user makes his decision.



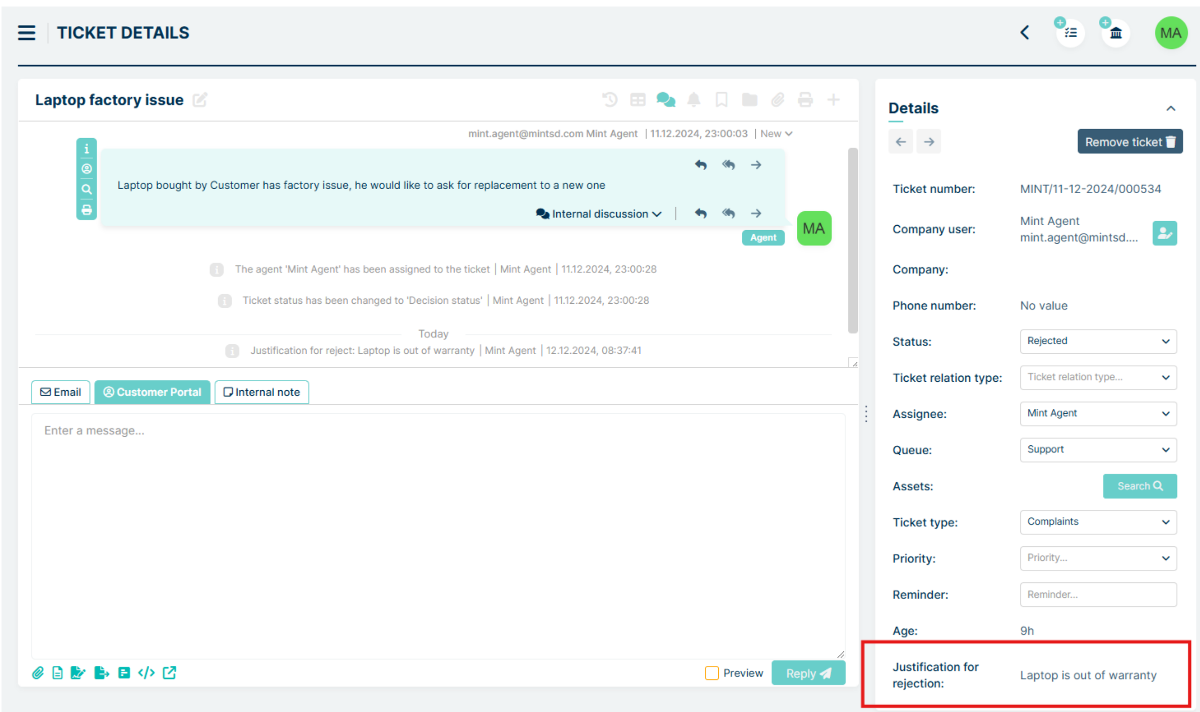
After clicking on the Approve button, a confirmation message appears



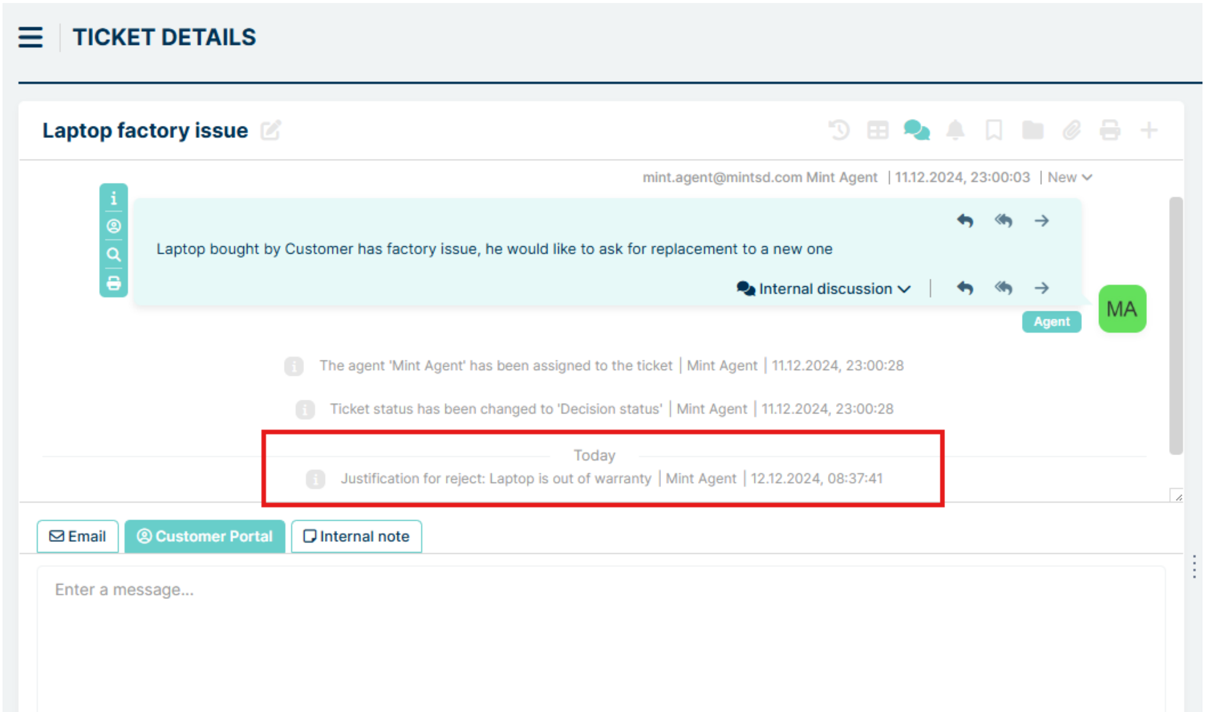
When the Reject button is clicked, a modal appears with the reason for the rejection. Providing the reason is required to perform the action.



If a ticket is rejected as a result of a negative decision by a user, the reason for the rejection of this user is presented in the details of the relevant ticket in the section marked below

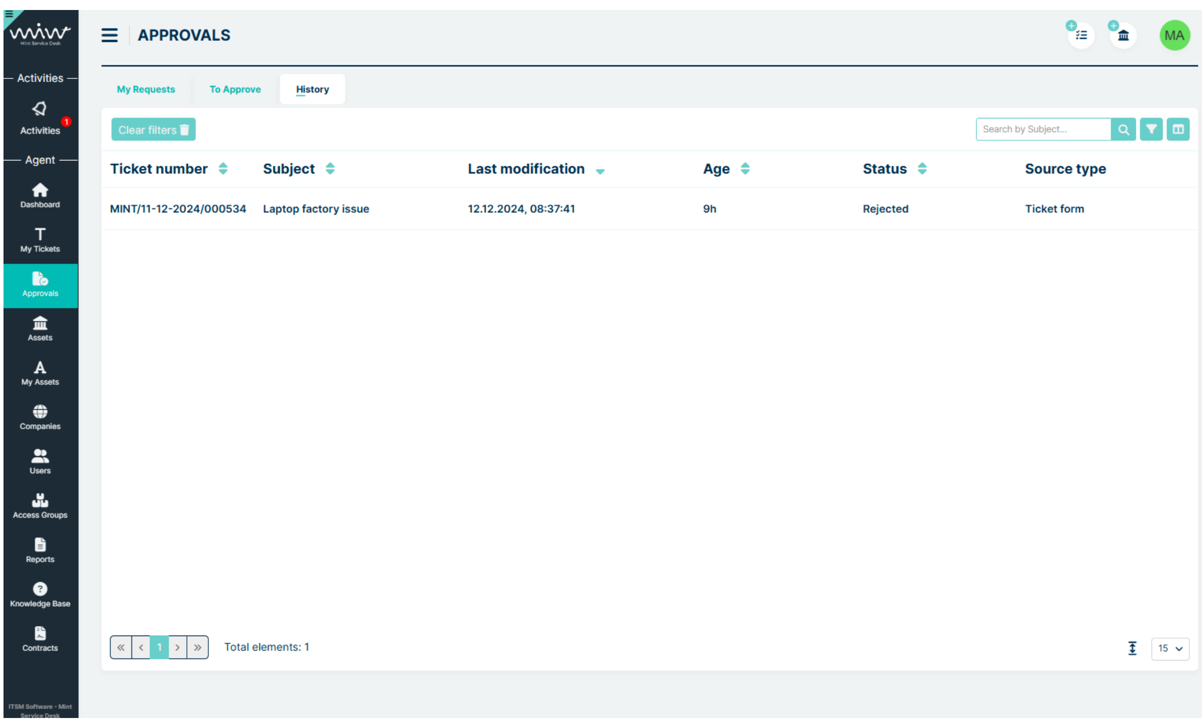


In addition, the content of the reason for rejection also appears in the article field in ticket details

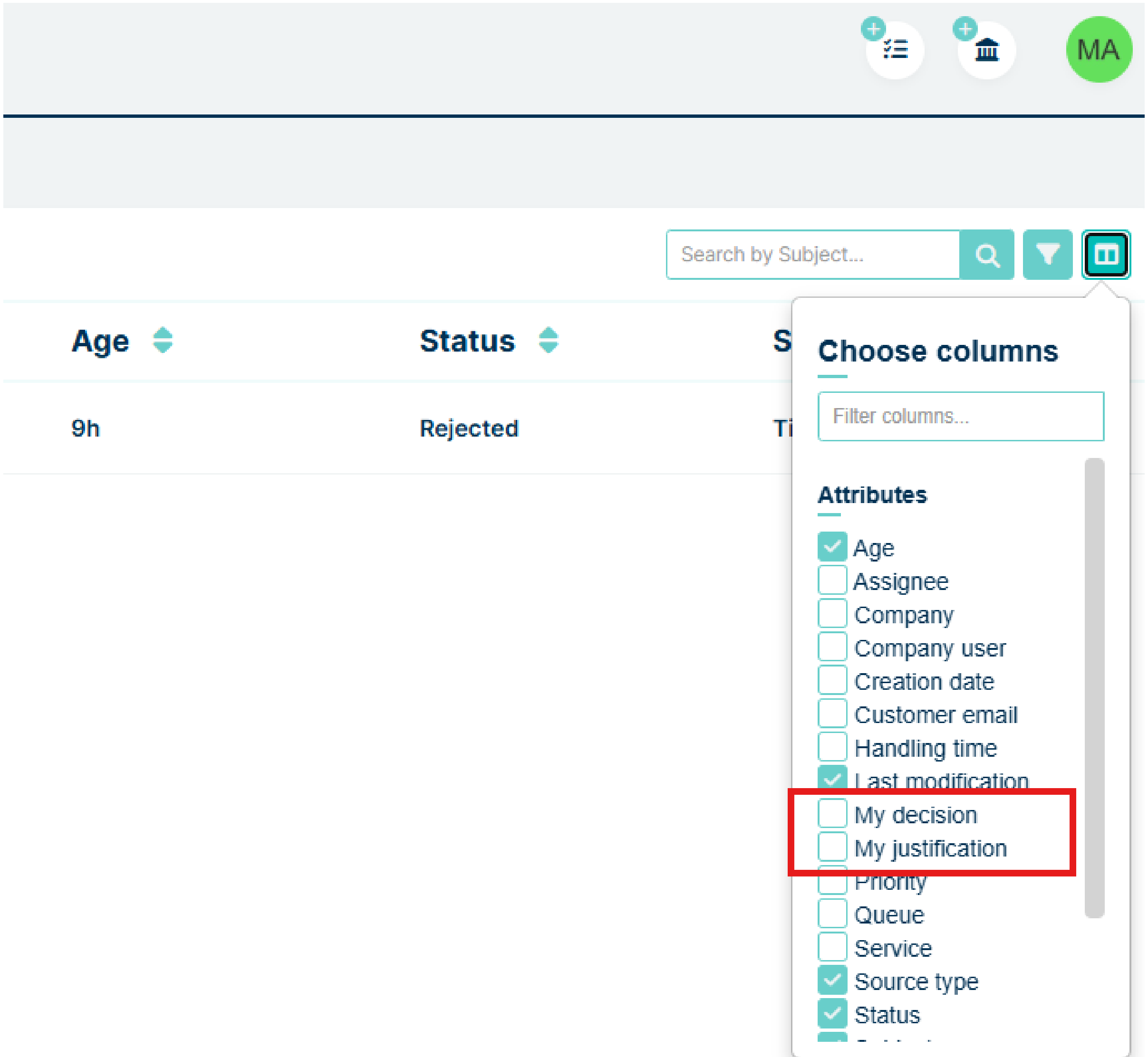


History

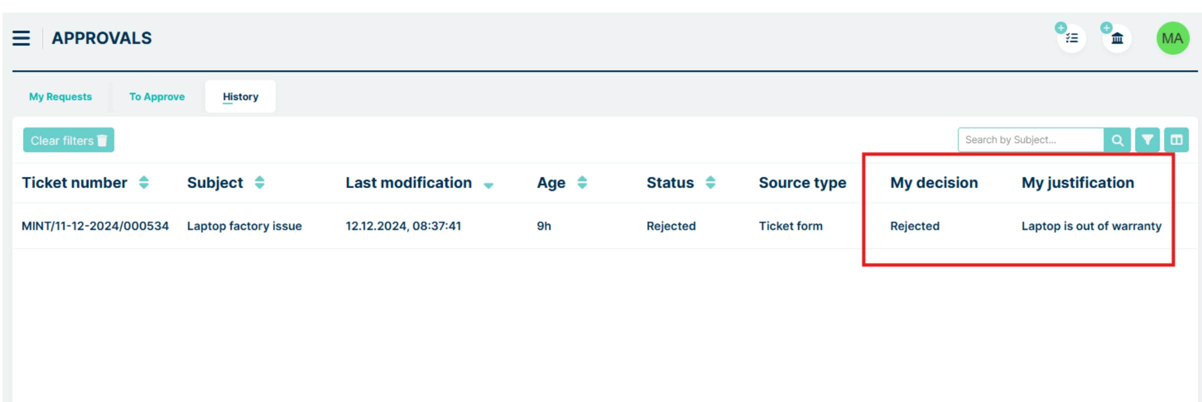
This view shows the tickets for which the current user has made a decision. History tab has additional columns: My decision and My justification.



User can add them into view via Set column properties button in upper right,



User can now see what decision he has made and - in case he made a rejection - the justification the user gave when issuing a negative decision in the Justification modal.

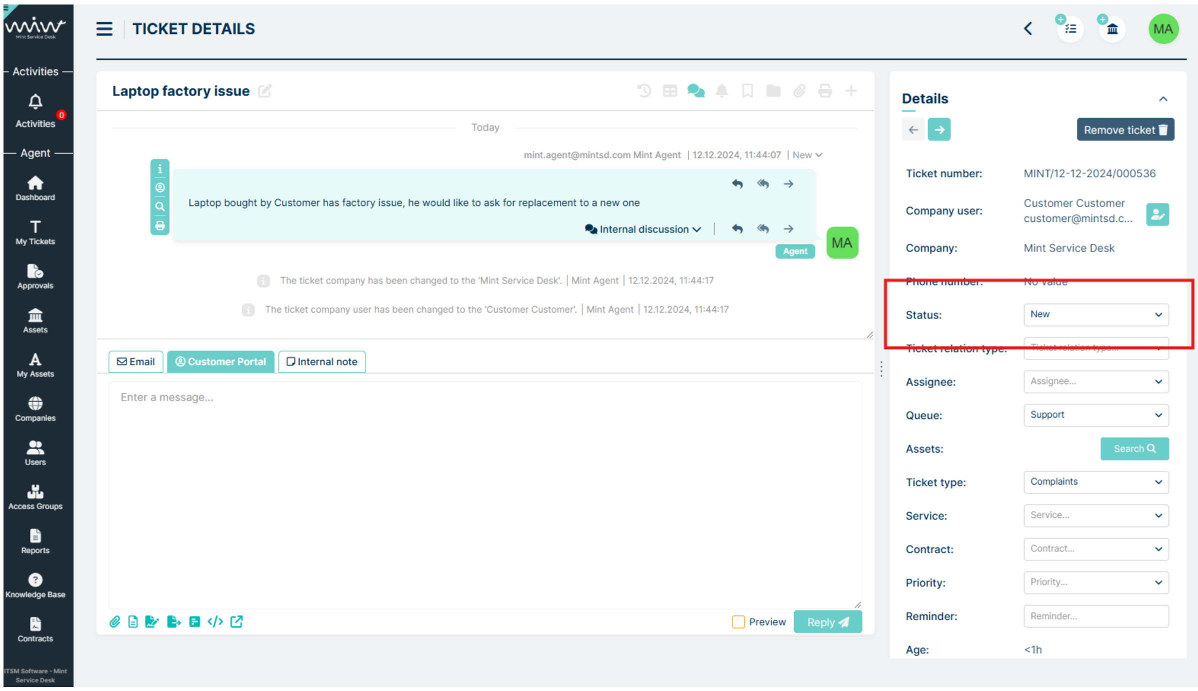


TICKET DETAILS

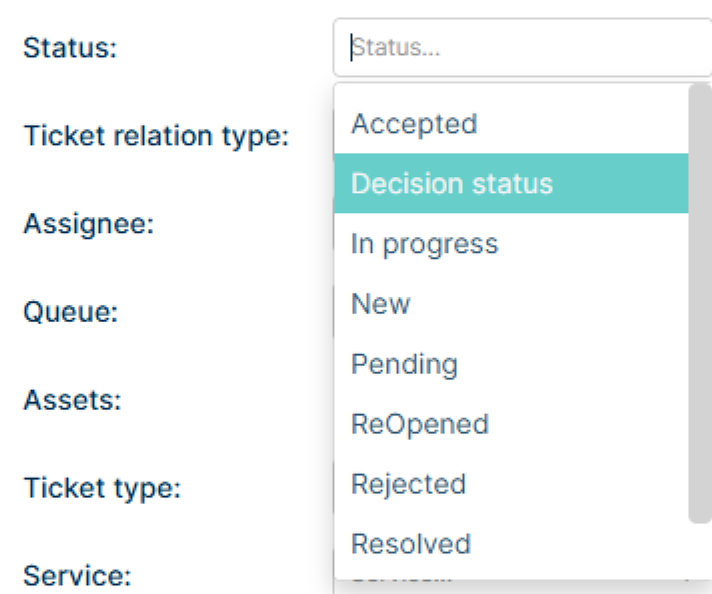
The most important actions in the ticket details related to the approval process are outlined below.

Changing the ticket status to Pending Approval

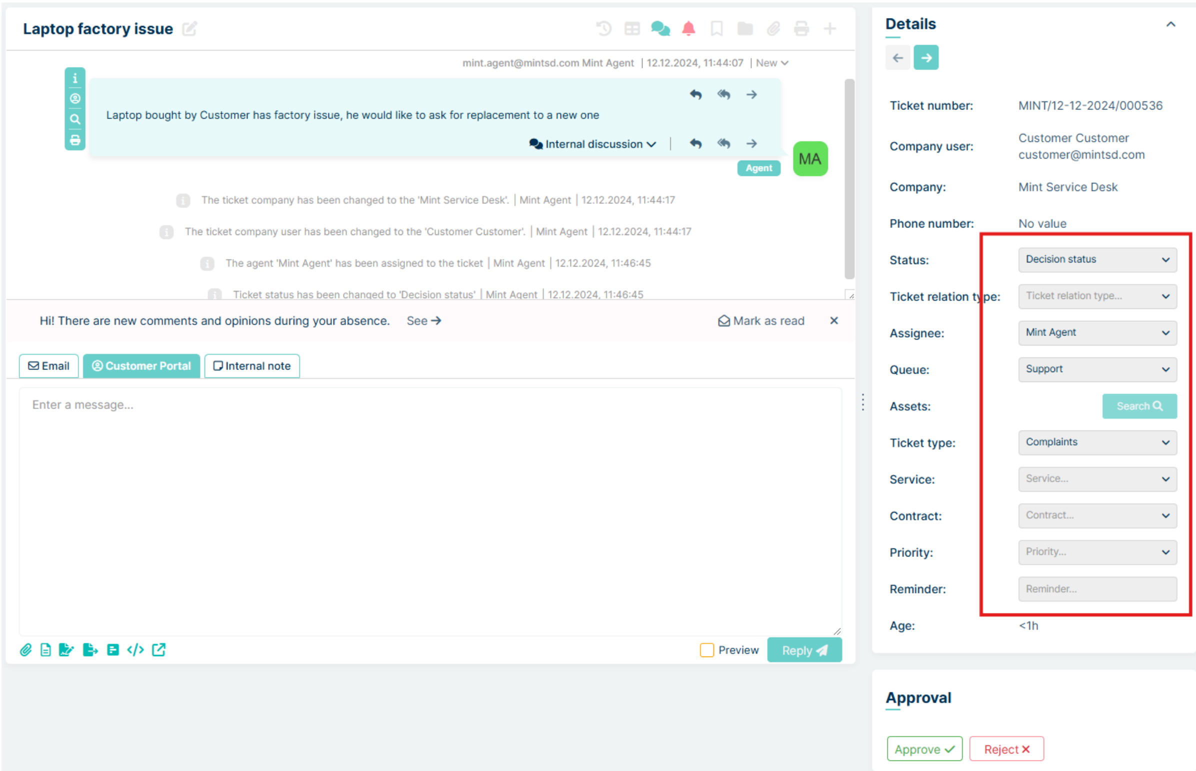
The agent transfers the ticket to Pending Approval status by changing the status in the section below:



From the dropdown menu Agent chooses Pending Appvoral status

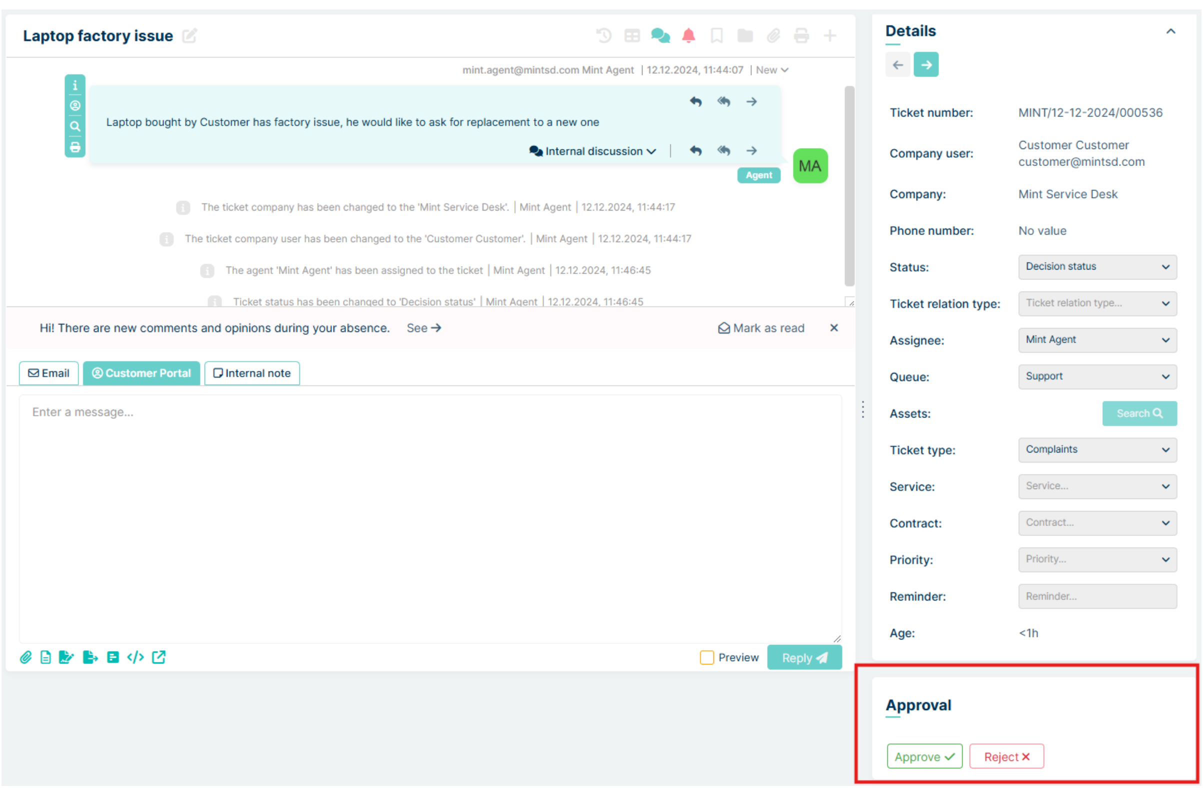


Once the status is changed, the ticket becomes greyed out and read-only.



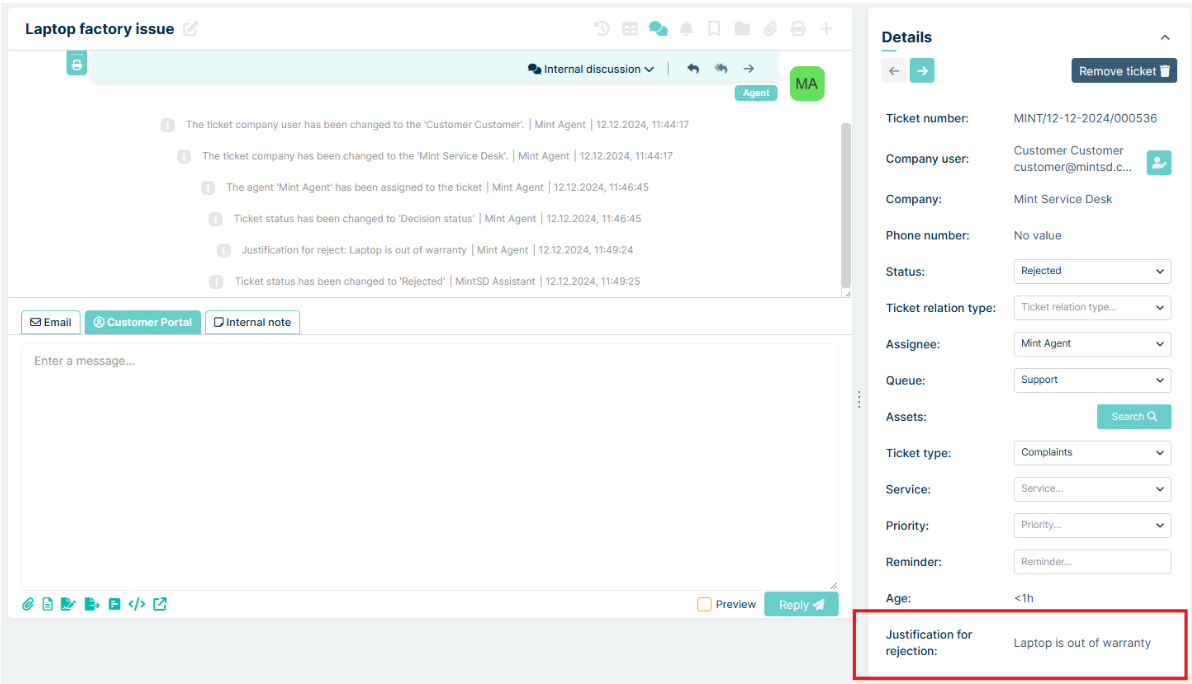
Approval panel in the ticket details

If the Agent is involved in the decision-making process, an additional panel appears in the section below with the option to accept or reject. The panel disappears once the Agent has made a decision



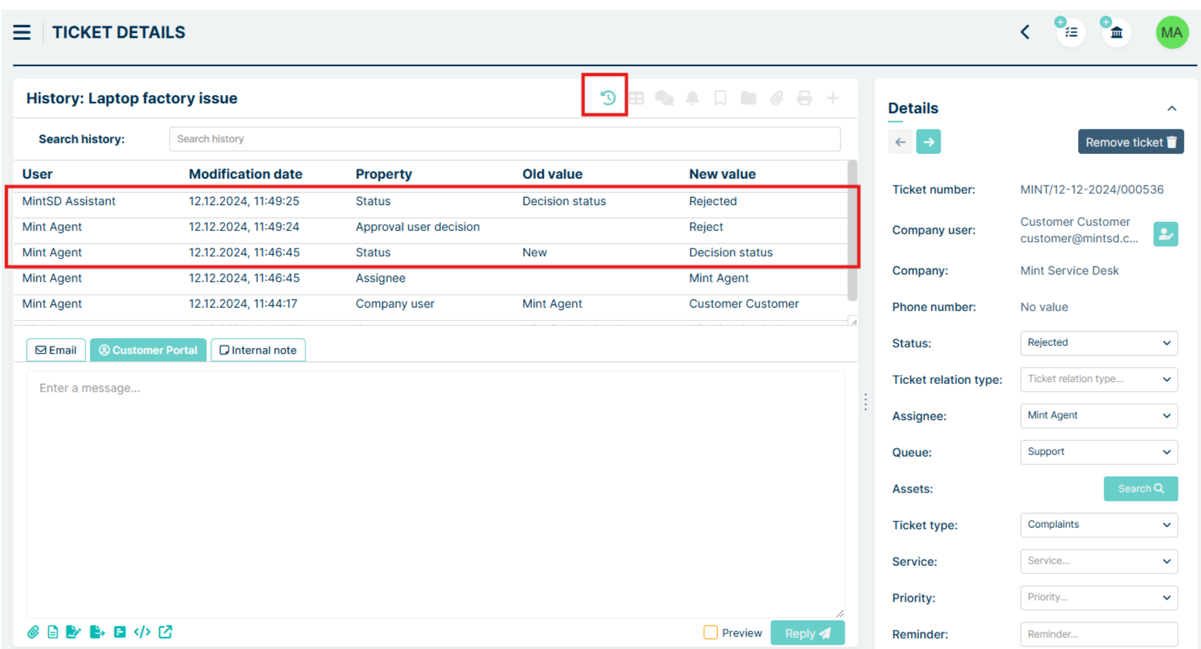
Information about the reason for rejection

If a ticket has been rejected, the section below shows the reason for rejection given by the last rejecting user



Ticket history

In the ticket history, you will find entries related to the decision-making process, i.e. information on decisions made by users, information on reasons for rejections, information on the decision made for the ticket

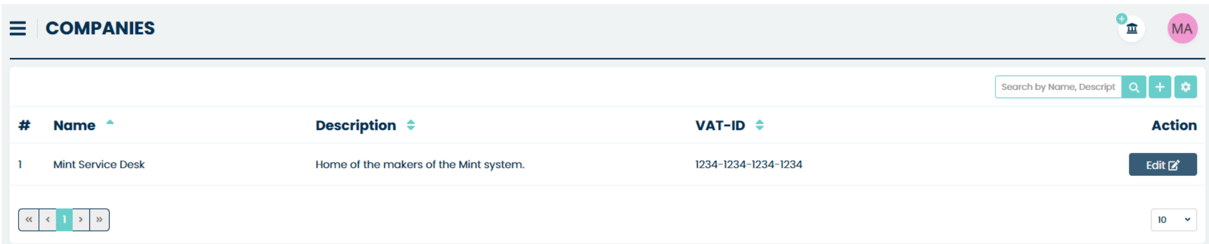


5.6 COMPANIES

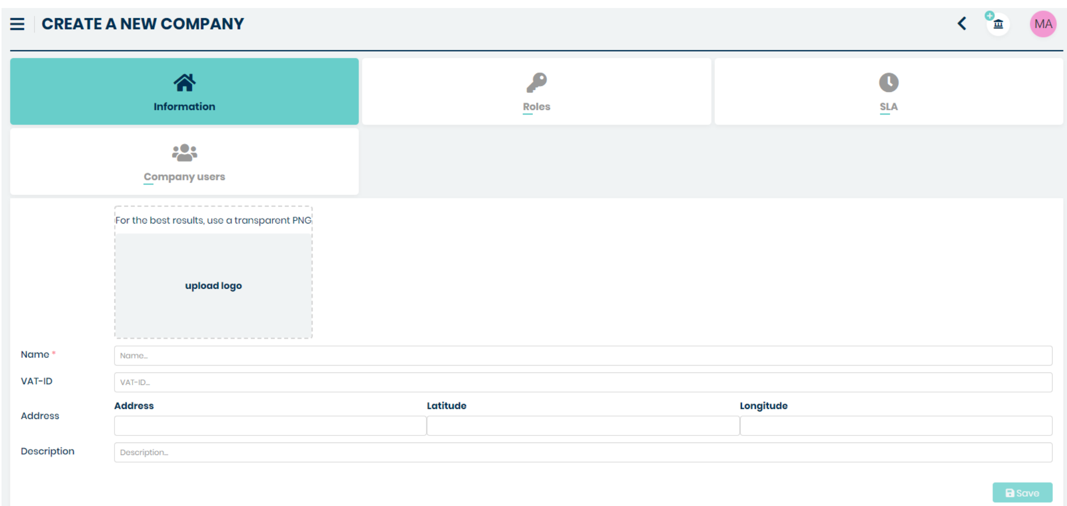
If you provide support to many customers from different companies, in this section you are going to manage them.

5.6.1 COMPANY MANAGER

In the 'Company manager' part you will see the list of all the companies that have already been configured. Mint Service Desk has one pre-defined company at the start. You can, of course, change its information.



If you want to create a new company, simply click the  button, located on the right side of a search box. It will open a 'Create new company' form.

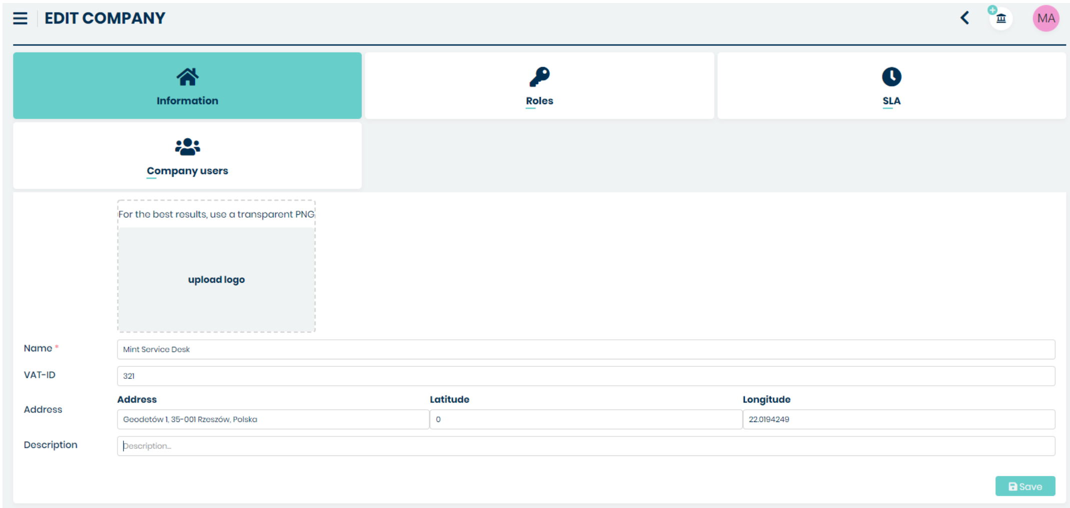


INFORMATION

In this place you can type some basic information about the company: 'Name' (required), 'VAT ID', 'Address', and description. You can also add a logo/picture – just click on the gray box 'upload logo'.

Once you finish click on the 

button. The screen will be refreshed and you will notice that other tabs ('Roles', 'SLA', 'Company users') have been unblocked. Also on the right side, you will see a new block with some additional attributes (if you created them in Companies > Company fields).



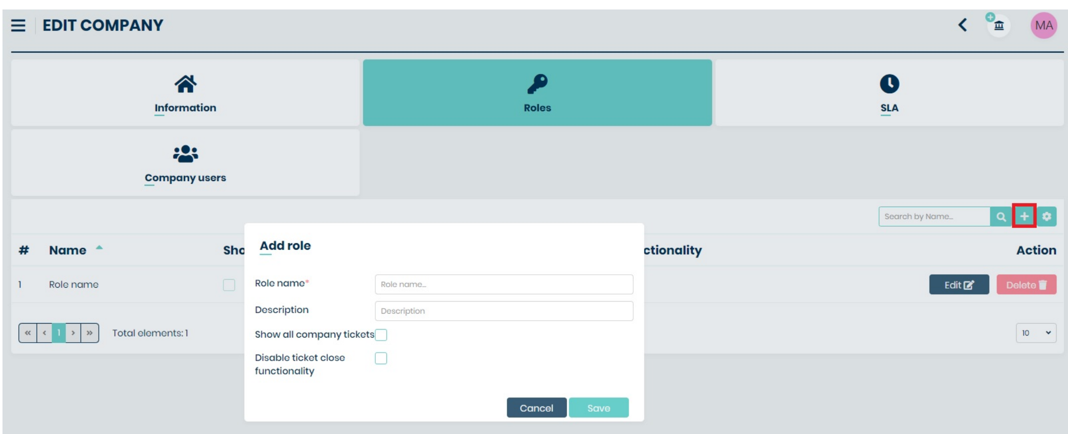
Now, while being in this part of the system, you can do a couple more things.

ROLES

The first one is that you can create a company 'Role'.

To do that, just go to the 'Roles' tab and click on the  button. It will open a small window where you need to type the name for that new role and click the 

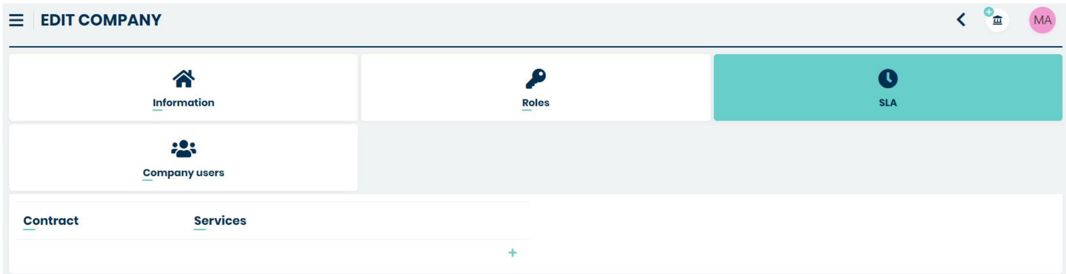
button.



That role can be later selected for a particular user under 'Role management' available e.g. in the Agents > Agents or Companies > Company manager > Company users parts of the system. It will be explained later in this guide.

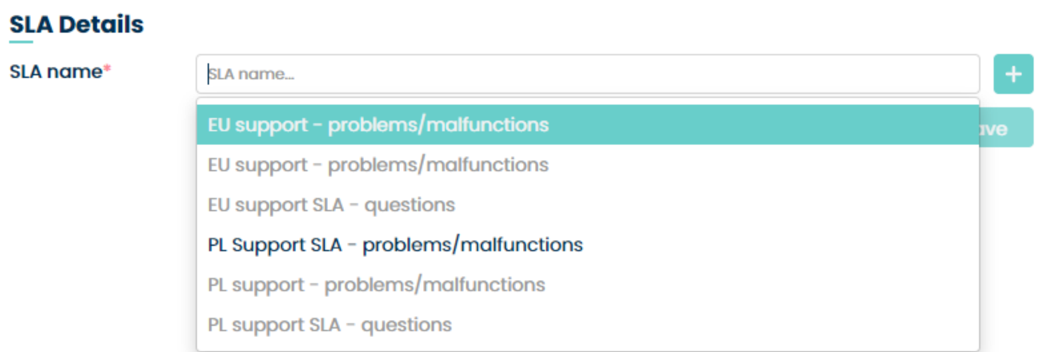
SLA

In the next section called 'SLA', you can manage your SLAs and add/remove any of them. Normally, once you created a new company, this tab will be empty and you have to add a new SLA.



If you want to add any SLA you need to click on the  button. Once you do that, on the right side a new section 'SLA Details' will appear.

Now you need to click on the 'SLA name…' field and select one of the already existing SLAs from the dropdown list. If you're adding second/third etc. SLA to this company you will see that some positions on the list are dimmed and you cannot add them.

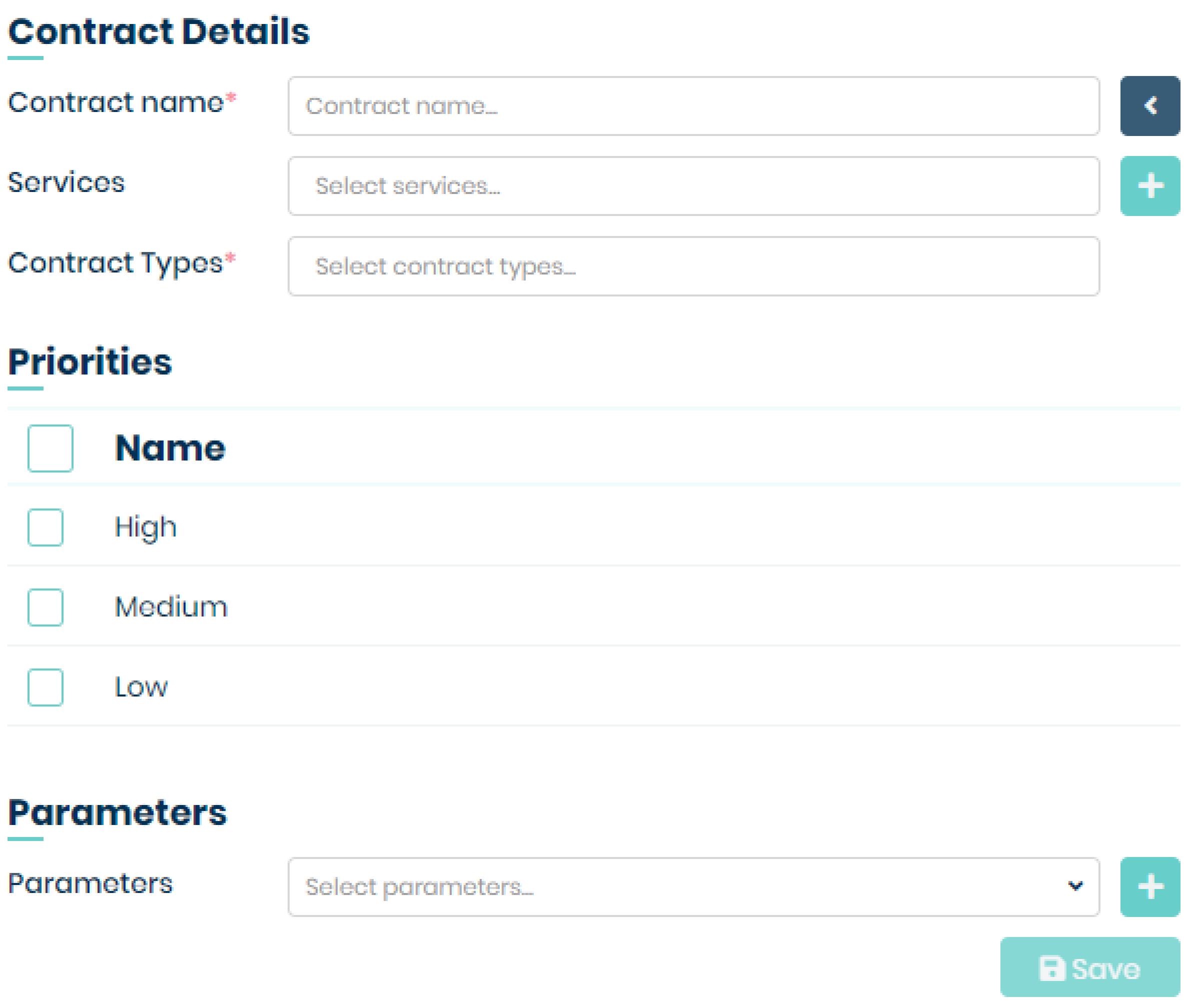


Select one that is available and click 

.

If, on the other hand, you don't want to use any of already existing SLAs, you can create a totally new SLA in this place.

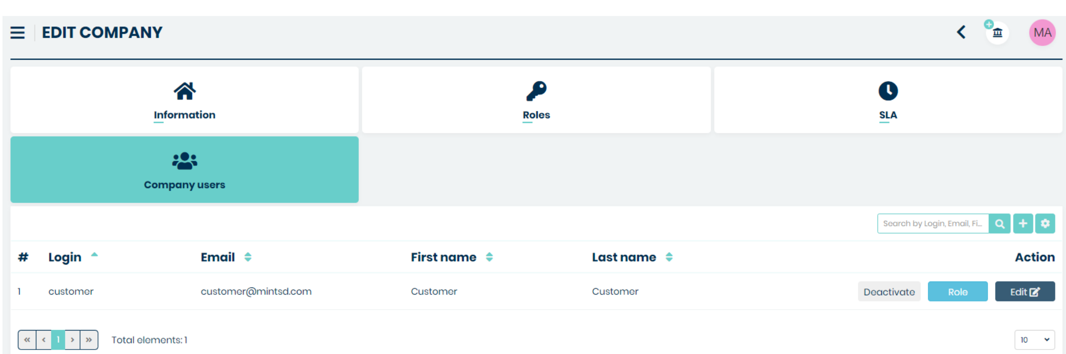
Just click the  button and a form for creating new SLA will be loaded.



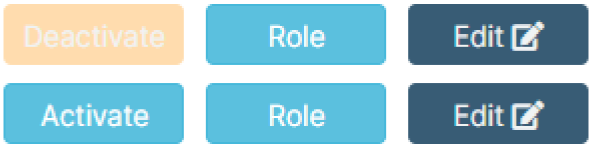
The whole process of creating and managing SLA (and also Services, Priorities and Parameters) is described in ‘Services’ part of this guide.

COMPANY USERS

In the ‘Edit company’ view normally the last tab ‘Company users’ is empty (if you just created a new company). To see any customer here, you need to grant some users the correct role (customer role) among those available for this company. Only once you do that (for example, as mentioned a moment before, in the Settings > Users) you will see a customer here.

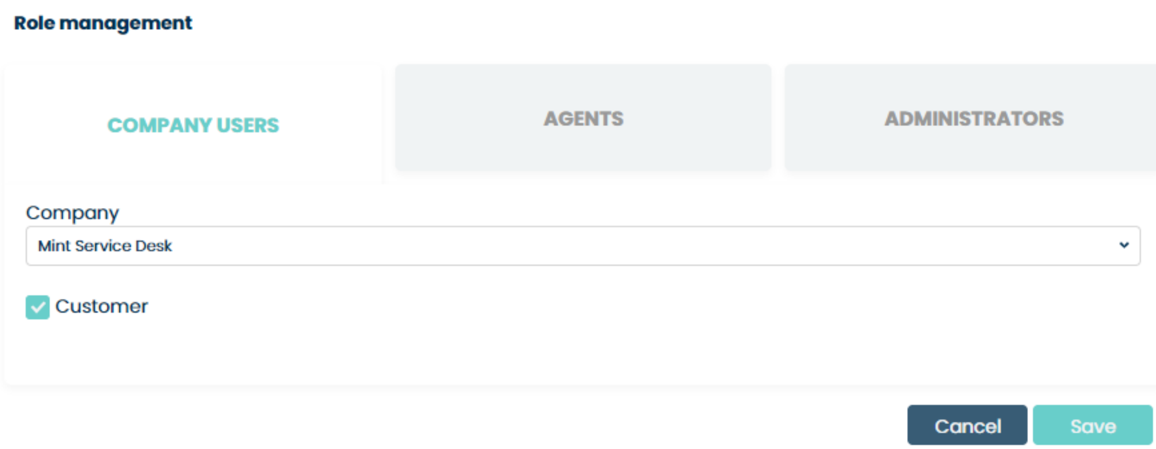


Now you will be able to do a couple of things. You can Activate/Deactivate the user. Deactivating means that the user account will be locked and he will not able to log in.

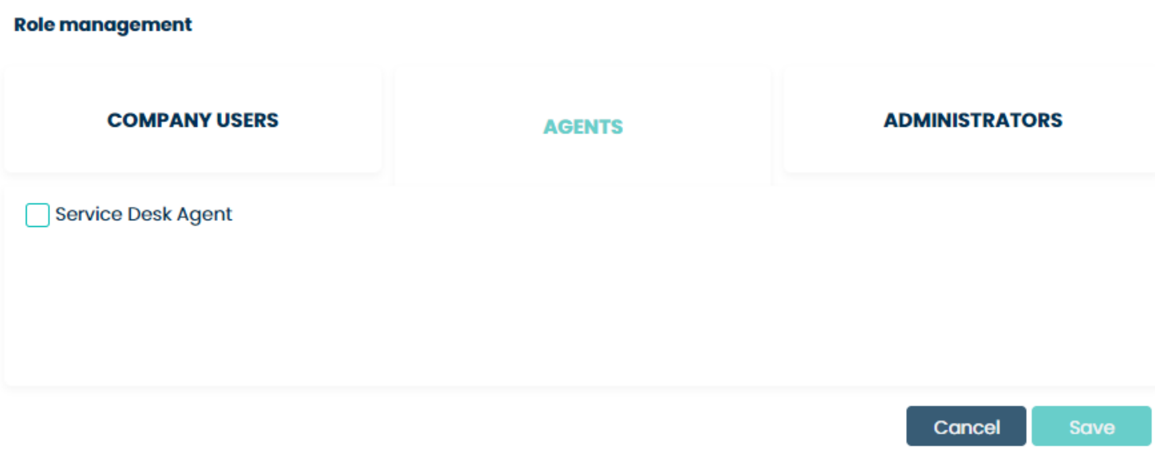


If you want to change the user role click the  button and in the next window ('Role management') change the role for the desired one. Please remember that, if you want to change the role from Customer type to e.g. Agent or Administrator type, you first need to unselect the current chosen one.

In the following example, we have chosen a Company 'Mint Service Desk' and available for this particular Company Customer type role: 'Customer'.



If we want to change it and grant the user an Agent type role, we need to unselect 'Customer' and switch the tab to 'Agents'. Take notice that one you have unselected 'Customer' the Agent tab became available.

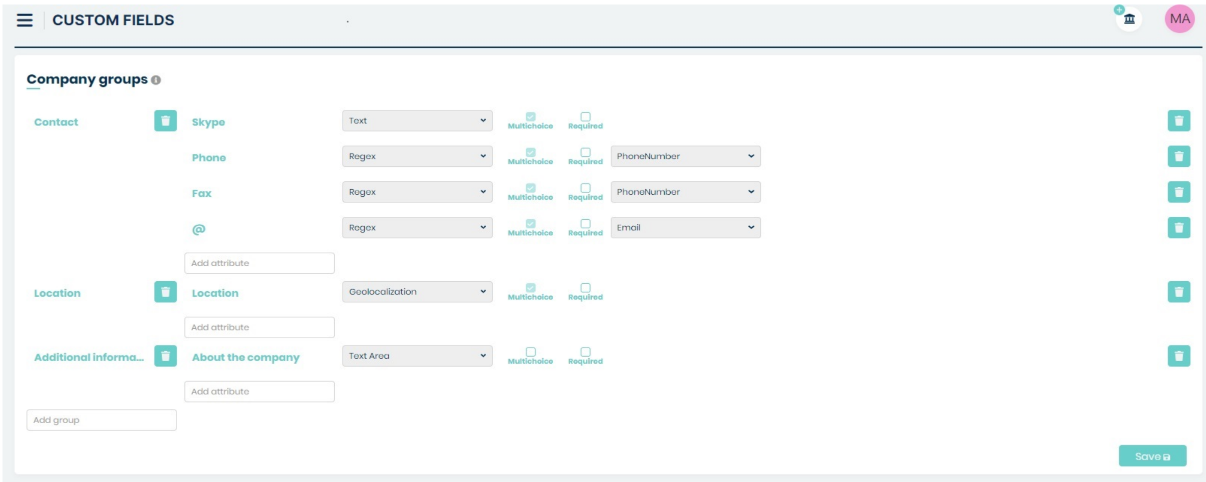


In this place, you need to choose and select one of the available Companies and their roles and click the  button. Once you do that the user will disappear from the 'Customers' tab and be moved under the 'Agents'.

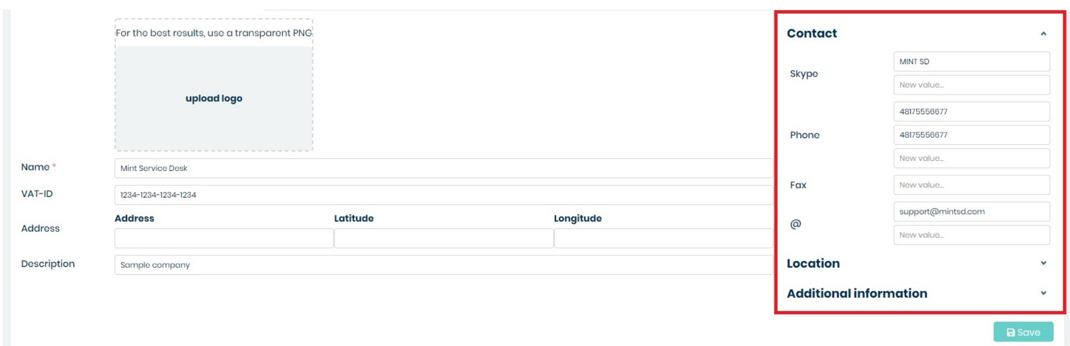
5.6.2 CUSTOM FIELDS

In the **MINT Service Desk**, we have some fields pre-defined where you can add some information about each company. Those are: 'Name;, 'VAT-ID', 'Address" and 'Description.

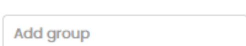
In the 'Custom fields' part you can create an additional group of fields for filling up (or selecting from the list) with even more information.



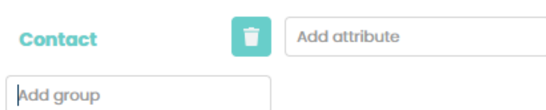
Those additional fields will be later visible in the 'Company Manager' section in the 'Edit company' view.



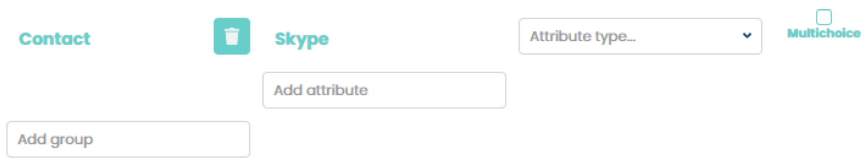
Let's add some new fields. First, in the default view of the 'Company fields', you need to create and name a new group (for example ' Contact'). Click on the empty field 'Add group'.



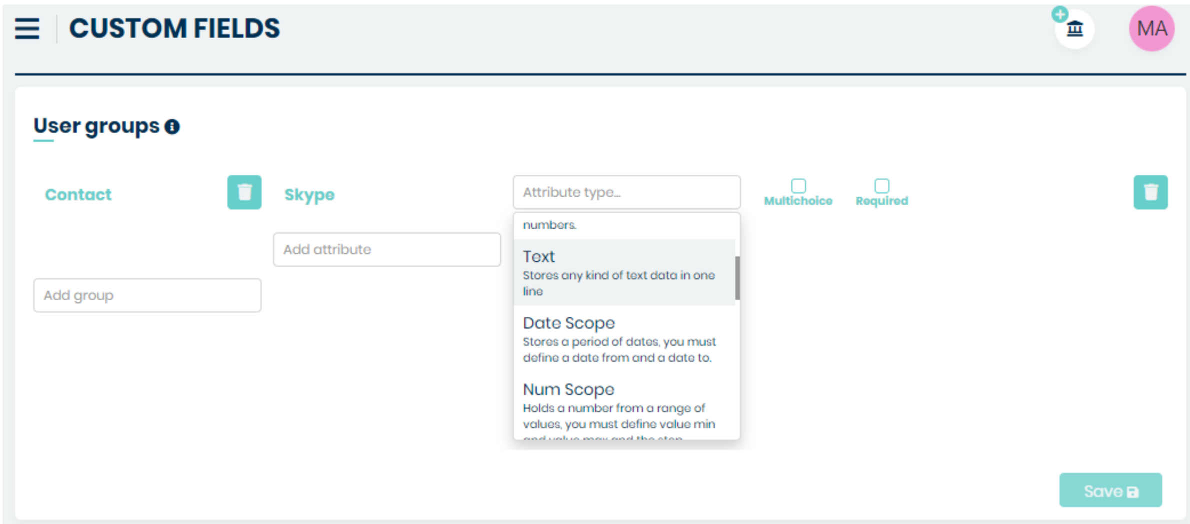
Type some name and press 'Enter' on your keyboard to confirm the name. Once you do that, on the right side you will see a new field 'Add attribute'.



Now, let's add some attributes. First, in the 'Add attribute' field type a name and confirm it with 'Enter'. On the right side, you will see a new field 'Attribute type…".



Select one type from the dropdown list. You can also select a 'MultiChoice' check-box to allow selecting/adding more than just one Value later in the Company details view.



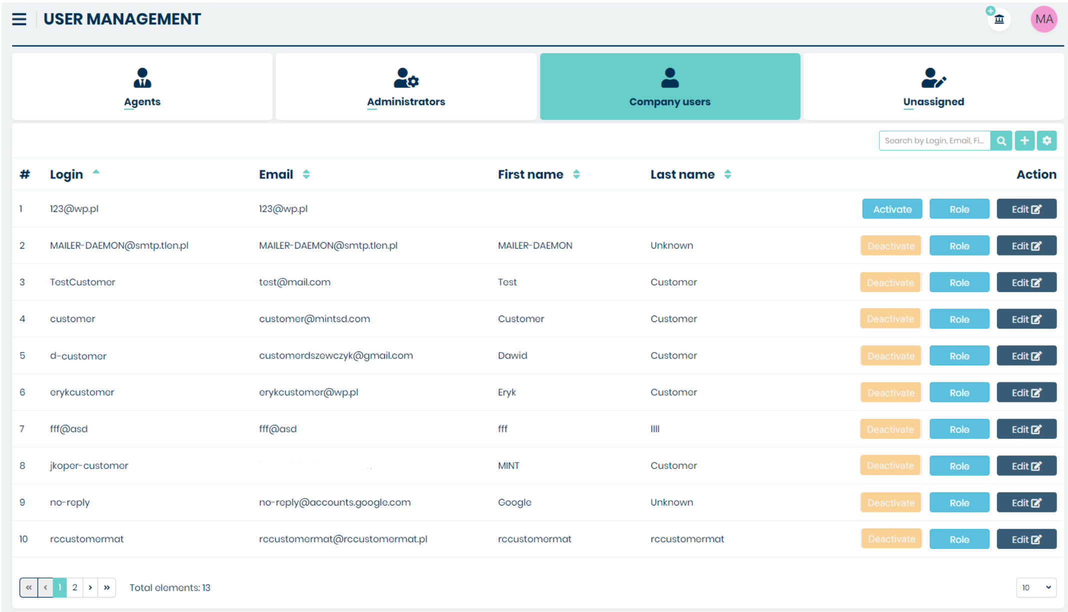
You can add plenty of attributes for the group. In the following screen, you can see a finished group with some important attributes already prepared.

Now, if you go to Companies > Company manager section and click on 

button on the right side of the company, you will see those additional attributes on the right side of the 'Edit Company' view.

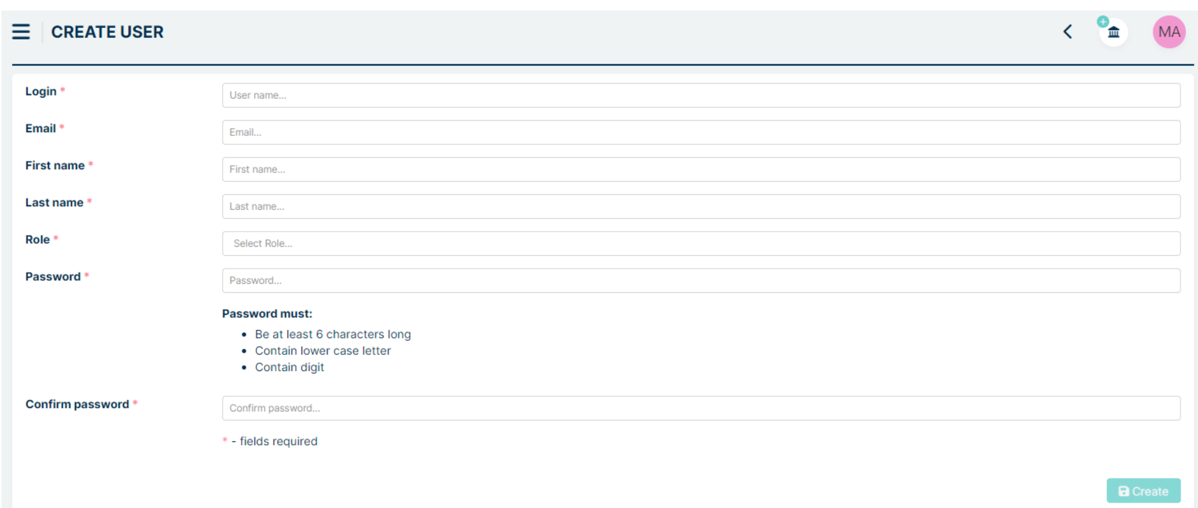
5.6.3 COMPANY USERS

In this part of the system, you will be managing the users. By default, the view will be set to the 'Company users' tab and you will see the list of all company users.



If you want to create a new user, you need to click on  button, located on the right side of the search box. This button is available for you in three tabs of the Users section: 'Agents', 'Customers', 'Administrators'. You won't be able to create a new user while being in the 'Unassigned' tab.

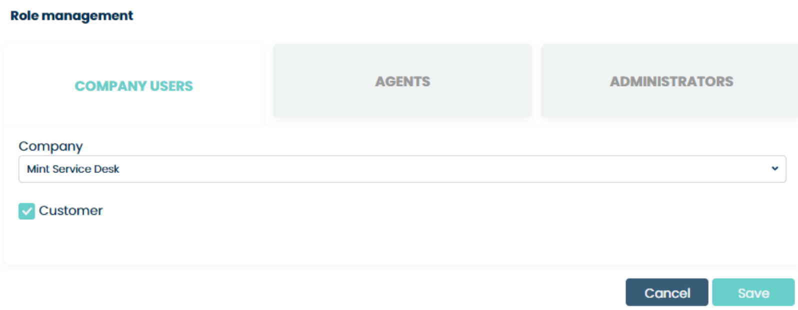
Once you do that you will be moved to the 'Create user' form, where you need to put in some information regarding the new user. Depending on the role you choose for that user, he will be later shown on a different tab (Agents, Customers, or Administrators).



With every user, you are able to do a couple of things. You can Activate/Deactivate the user. Deactivating means that the user account will be locked and he will not able to log in.

You can also change the user Role. Just click the 

button and in the next window change the role for the desired one.



Please remember that, if you want to change the role from Company user type to e.g. Agent user or Administrator type, you first need to unselect the current chosen one. Only then the other tabs inside 'Role management' will be unblocked.

Once you change the role and click 

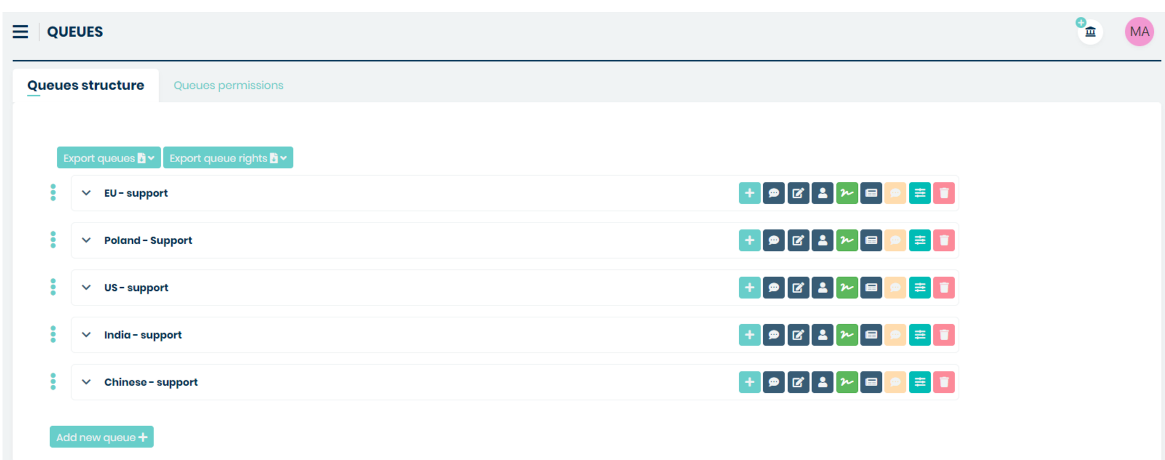
the user account will be moved to a different tab (in the 'Company users view), depending on your choice.

One last thing worth mentioning is that when you save the account without any role chosen, it will be moved to the 'Unassigned' tab.

5.7 TICKETS

5.7.1 QUEUES AND PERMISSIONS

The queues in **MINT Service Desk** are "containers" of tickets. You can define your queues based on resolution teams, departments, logical units, processes, and workflow interaction teams. In order to define your queue structure and have it configured you will have to use functions available in the "Queues" section.

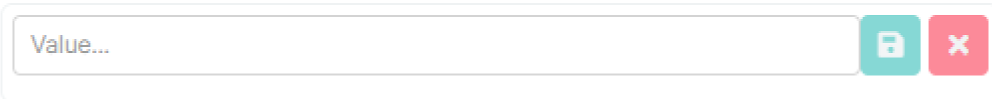


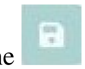
As you already noticed, the default view will show you the 'Queue structure' tab. The second one is 'Queues permissions'.

Queue structure

At the bottom of this view, you will find one button 

. It is used for creating and adding a new queue to the structure. Once you click on this button a new position will appear right below the last one already existing.

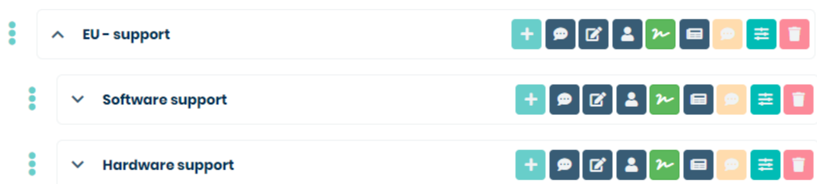


Now, you only need to type the right name for this queue and either hit 'enter' on your keyboard or click on the  button.

Once a new queue has been created, you can do several things with it.

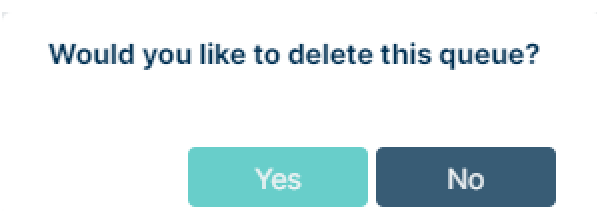
The first one is that you can add a sub-queue by clicking on the  button and adding a sub-queue in the same way as you did it with the main queue.

Each queue that also has sconub-queues will be displayed by default with those sub-queues hidden. In order to see them, you must expand the queue by clicking on  button. Then you will see the queue along with its sub-queues just like on the following screen.



If you want to change the name of any queue, just click the  button, change the name, and hit 'Enter' or click the  button.

To delete a queue, click on the  button, and in the new window click 'Yes'.



Remember that you can always change the position of each queue and sub-queue in the structure. To do that just click the  button next to the position you want to move. Now, while holding the Left Mouse Button just drag and drop this position to the plane you want it to be. Releasing the Left Mouse button will put this position in the newly chosen place.

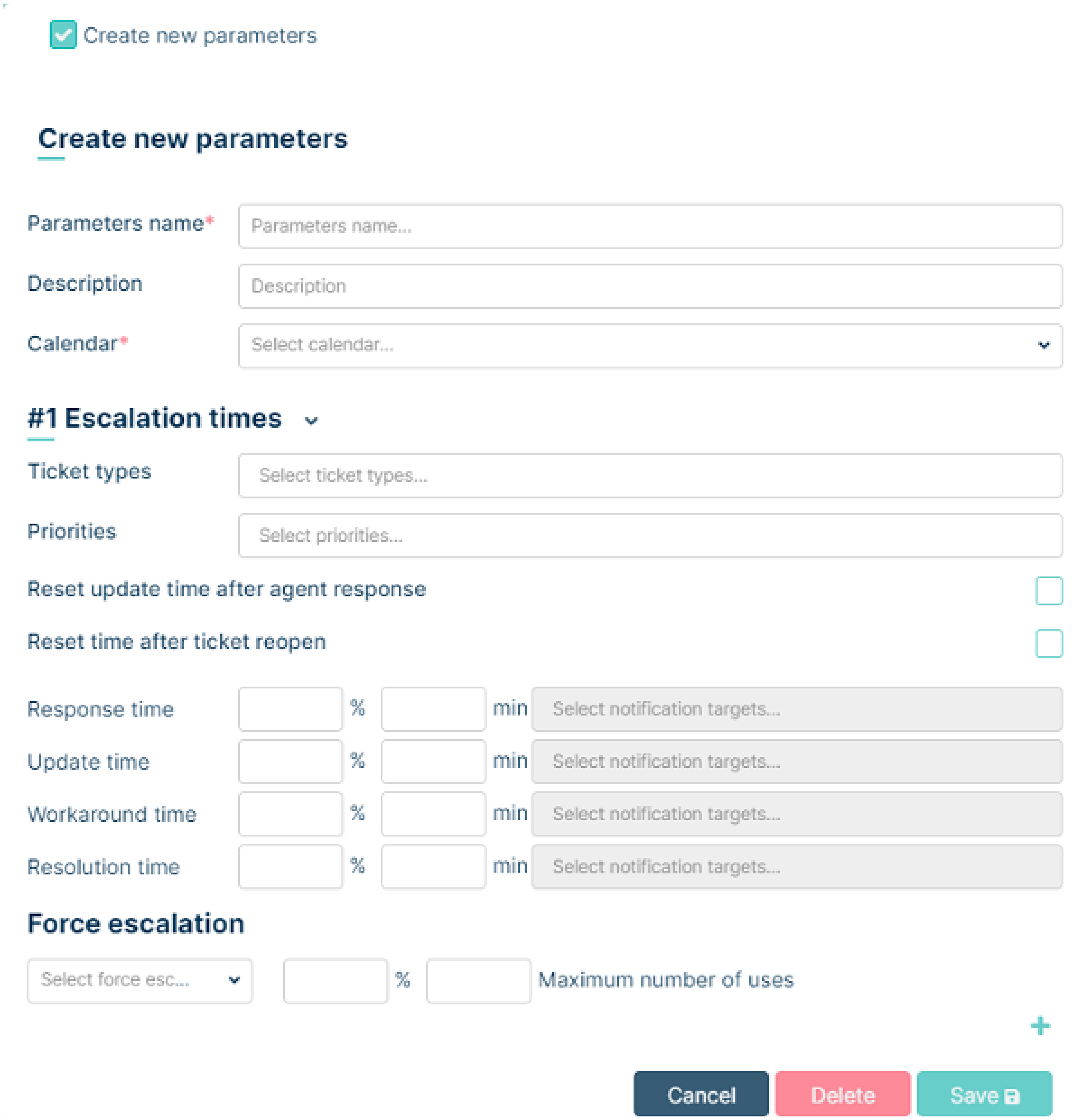
To assign parameters to queue, click the  button. In the new window select one of the parameters available from the list and click on the 

button.

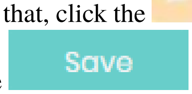
To create new parameters click on 

, fill in the required fields (Parameters name, Calendar, Response time, Resolution time) and any other if you want, then click on the 

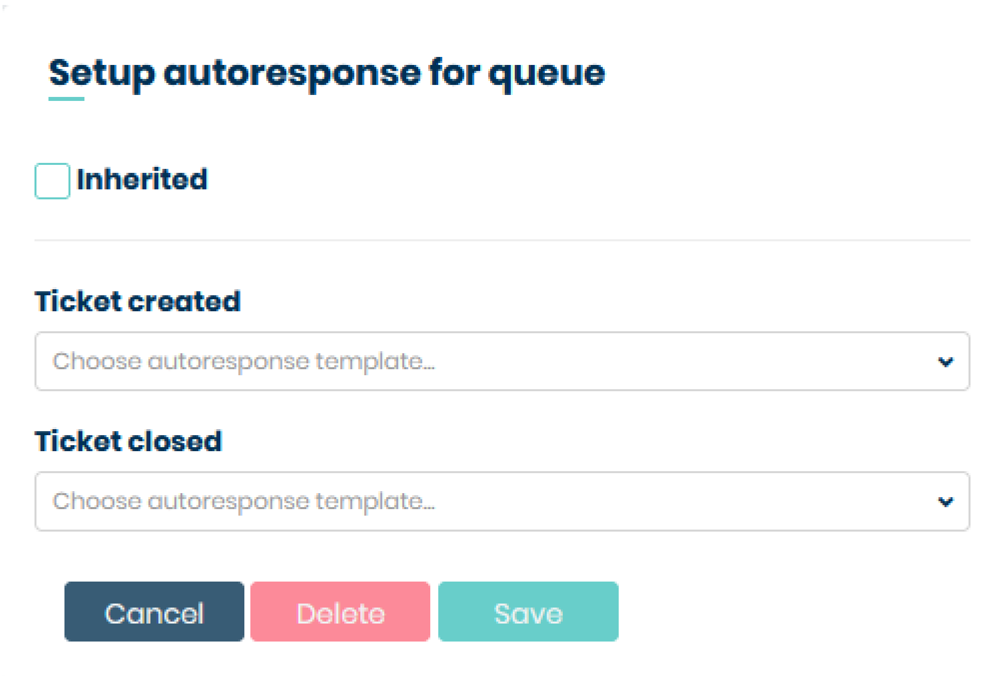
button.



For each queue and sub-queue, you can configure ‘auto-responses’. Those are the automated messages that will be sent by the system in the Ticket Details communication section.

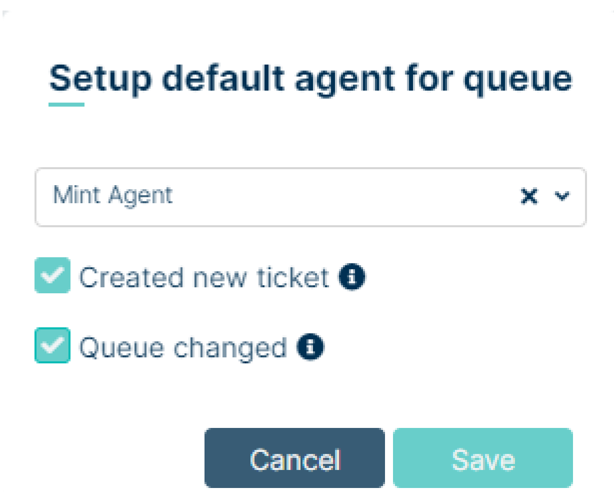
To do that, click the button. In the new window select one of the auto-responses available from the list and click on the 

button.



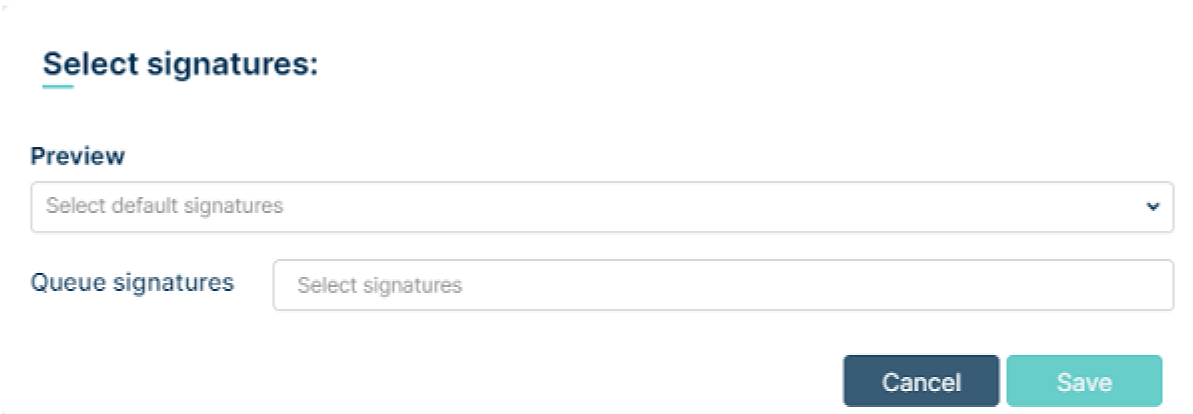
The detailed information on how to create custom auto responses will be described later in this guide, in the Tickets > Templates section.

To configure the default agent assigned to the queue click the  button.



Clicking on the drop-down list will display a list of agents with permissions to the selected queue (see Queue permissions in this section). You can select the default agent and decide when this agent will be assigned. To do that you only need to check one (or both) of available options: 'Created new ticket' and 'Queue changed'. For 'Queue changed' the default agent will only be assigned if no agent is assigned to the ticket.

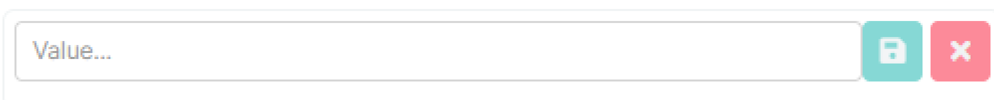
To configure the default signature, press the  button. After pressing this button, a modal will be displayed with the signature selection.



In the 'Preview' field, the admin can select a signature of interest and preview what the selection will look like. (Signature creation is found later in the documentation under 'Signatures') When the admin has decided which signatures he wants to assign to a queue he selects them in the 'Queue signatures' field.

To configure the ticket counter, press the  button. After pressing this button, a dropdown menu will be displayed with the ticket number selection. (Ticket number creation is found later in the documentation under 'Ticket number counter') After selecting an interesting counter, confirm the action by pressing the  button.

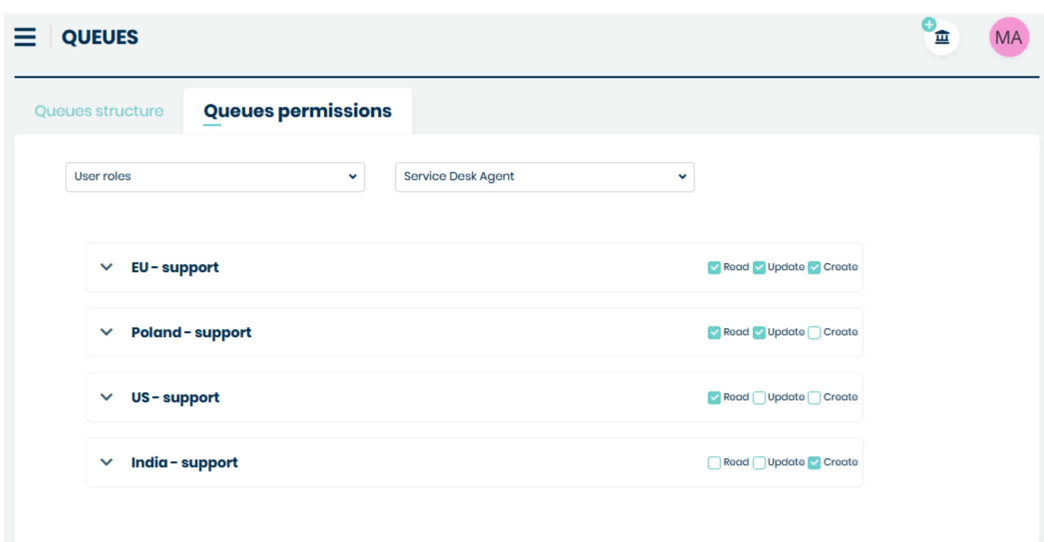
Last, but not least, you can configure the queue description by clicking on the  button



In 'Value' field enter the description text and click the  button to apply changes.

Queue permissions

The second tab is the place where you manage rights for viewing or editing Ticket information within a particular queue and sub-queue.

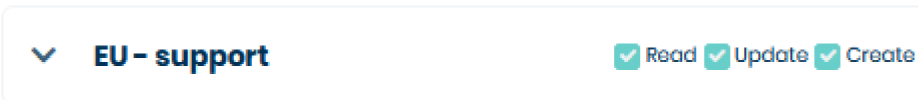


If you want to change rights, first you need to select one position from the list of available General types of roles. They can be e.g. 'Agent Roles' (if you have more than one created in the Agent Roles section) or 'Company Roles' (located in Companies > Company users section, separately for each company in 'Role management' > Company users tab.

After you do that, from the second list you need to select a particular type of Role for which you want to change the right.

The screen below shows the situation when we've decided to select 'Agent roles' and then one particular role: 'Service Desk Agent', which means that we will be able to change the rights for this particular role.

Now we can change the rights by selecting some check-boxes located on the right side of each queue.



There are two types of rights in the Mint Service Desk:

- **Read** – allows the user only to view the content of the Tickets on a queue
- **Update** – allows the user to make changes in the content of a Ticket on a queue. For example, Agent will be allowed to answer the client (to create a message in the communication section, change the ticket parameters).
- **Create** – allows the user to create tickets. The user can have Create but not Update and Read rights.

Please notice that when you select the 'Read' it will be selected, but the 'Update' will not be selected.

However, when you select 'Update' it will also select 'Read'. Update means that you can view and change the content of a Ticket.

Once you finish making the changes, you need to click 

button, otherwise, when you try to leave this part of the system it will inform you that you have some unsaved changes.

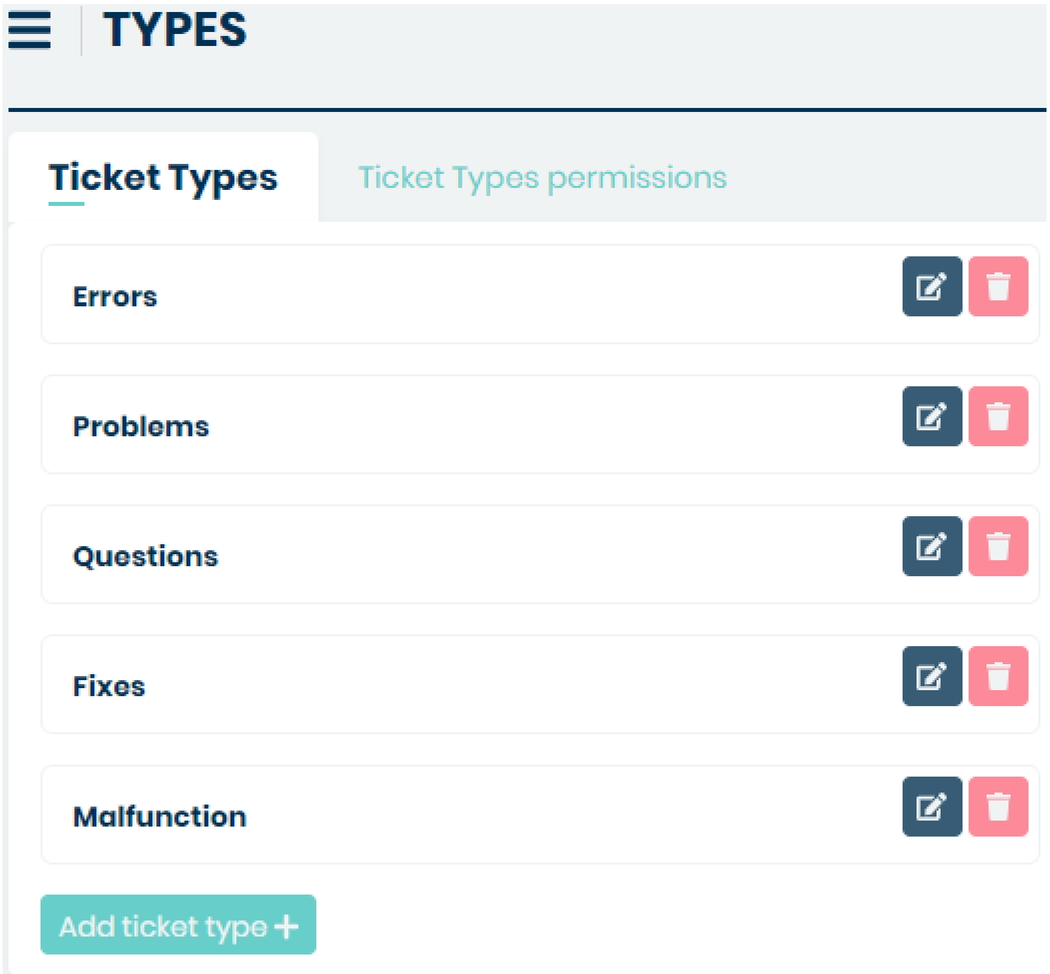
In this section, you can configure the whole structure for Tickets. Step by step you can create, edit or delete: 'Ticket types', 'Groups' (of attributes), as well as single 'Attributes' along with their values. You will also set custom Statuses for your Ticket Types and unique Ticket number pattern.

5.7.2 TYPES

In this part of the system, you can customize the structure for Ticket Types as well as change rights for viewing or making any changes to ticket types or their attributes.

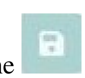
TICKET TYPES

It is the default view when you go to the 'Types' part of the system.



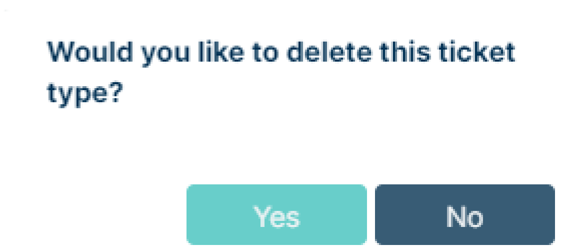
At the bottom of this view, you will find one button 

. It is used for creating and adding a new ticket type to the structure. Once you click on this button a new position will appear right below the last one already existing.

Now, you only need to type the right name for this queue and either hit 'enter' on your keyboard or click on the  button.

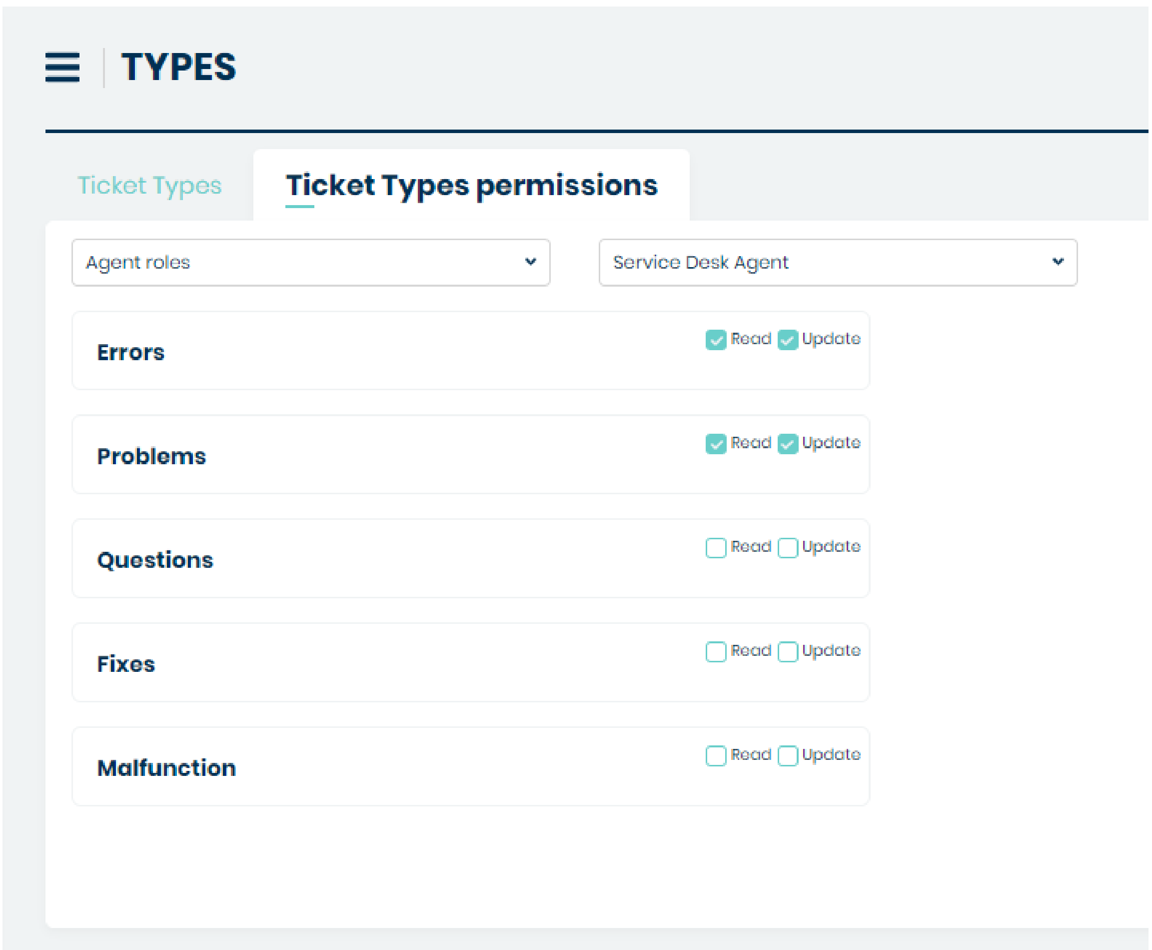
If you want to change the name of any already existing ticket type, just click the  button, change the name, and hit 'Enter' or click the  button.

In order to delete a ticket type, click on the  button, and in the new window click 'Yes'.



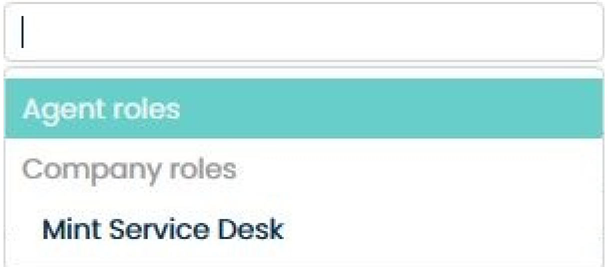
TICKET TYPES PERMISSIONS

The second tab is the place where you manage rights for viewing or editing Ticket information. You can do this separately for each Ticket Type you currently have.

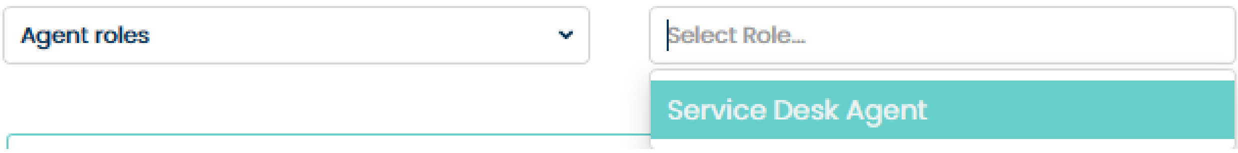


If you want to change rights, first you need to select one position from the list of available General types of roles.

They can be e.g. ‘Agent Roles’ (if you have more than one created in Admin > Agents > Roles section) or ‘Company Roles’ (located in Admin > Companies > Company Manager section.

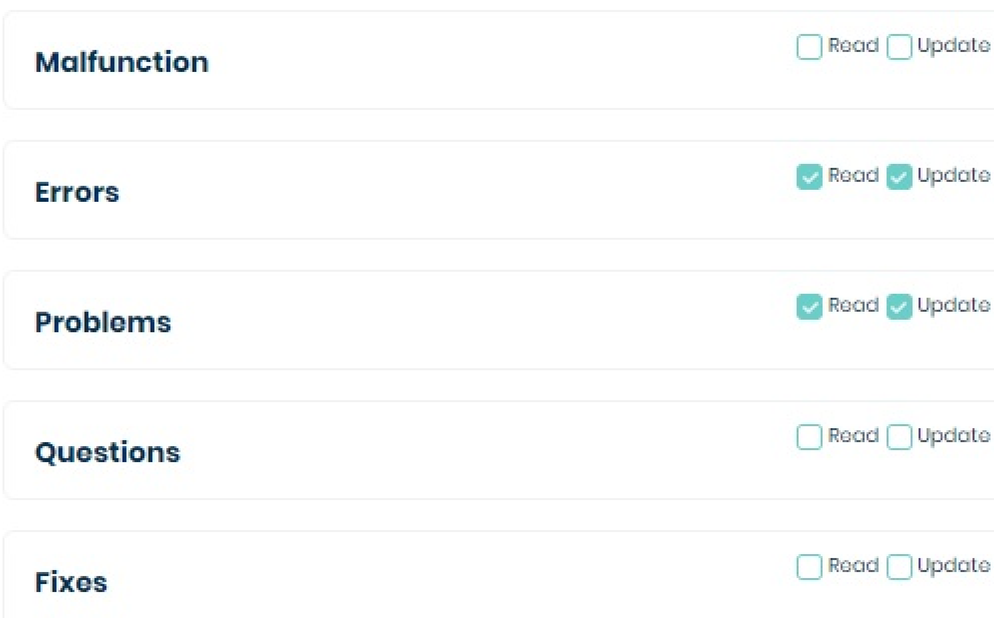


After you do that, from the second list you need to select a particular type of Role for which you want to change the rights.



The screen below shows the situation when we've decided to select 'Agent roles' and then one particular role: 'Service Desk Agent', which means that we will be able to change the rights for this particular role.

Now we can change the rights by selecting some check-boxes located on the right side of each Ticket type.



There are two types of rights in the Mint Service Desk:

- **Read** – allows the user only to view the content of the Tickets
- **Update** – allows the user to make changes in the content of a Ticket. For example, Agent will be allowed to answer the client (to create a message in the communication section)

Please notice that when you select the 'Read' it will be selected, but the 'Update' will not be selected.

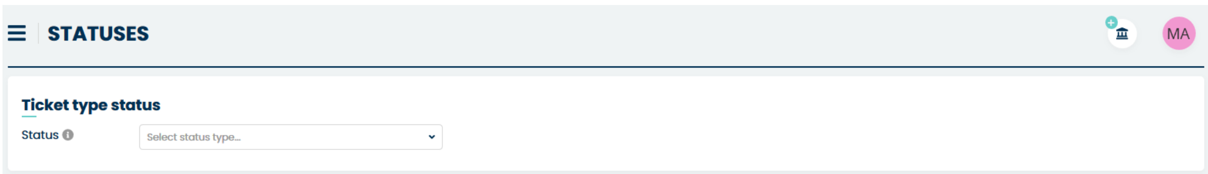
However, when you select 'update' it will also select 'Read'. Update means that you can view and change the content of a Ticket.

Once you finish making the changes, you need to click 

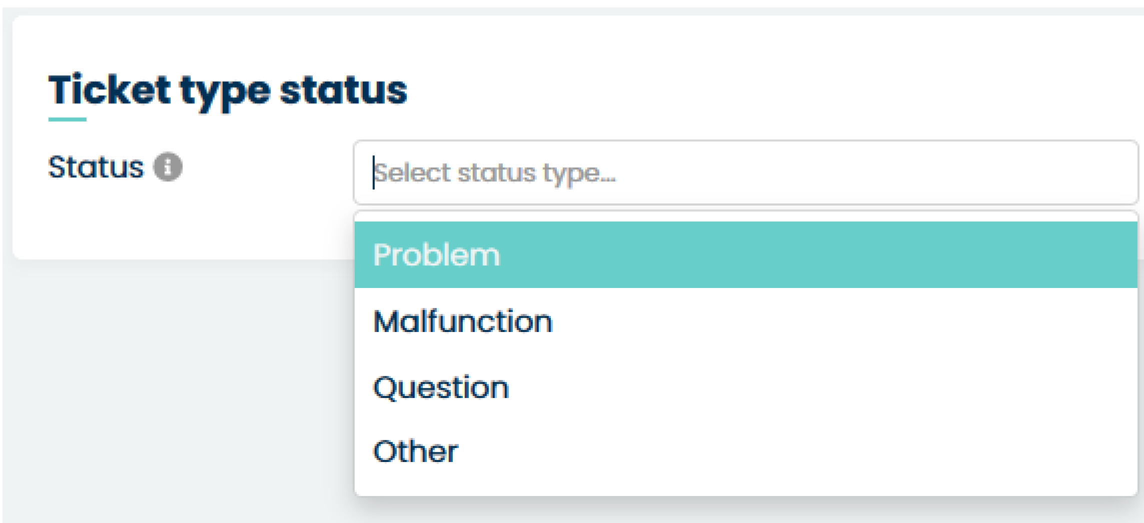
button, otherwise, when you try to leave this part of the system it will inform you that you have some unsaved changes.

5.7.3 STATUSES

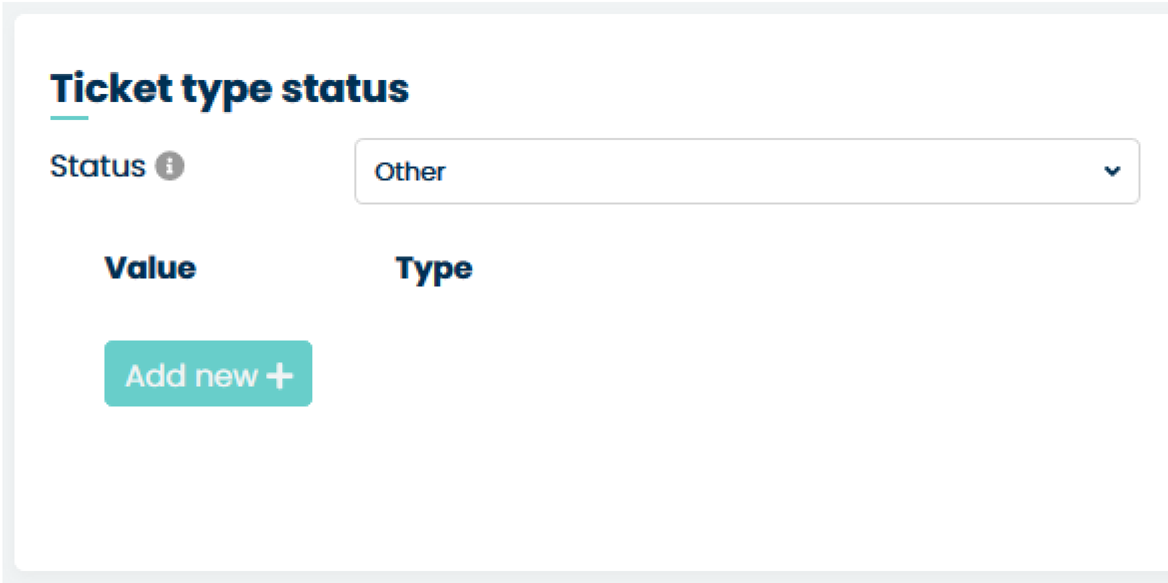
Mint Service Desk includes the feature "Statuses". It helps you to create different states for your ticket types. Normally the defined processes for each ticket type also include different stages or status, sometimes they use the same states but also sometimes they are totally different, especially in ITSM where the status for Incident Management or Problem Management is different.

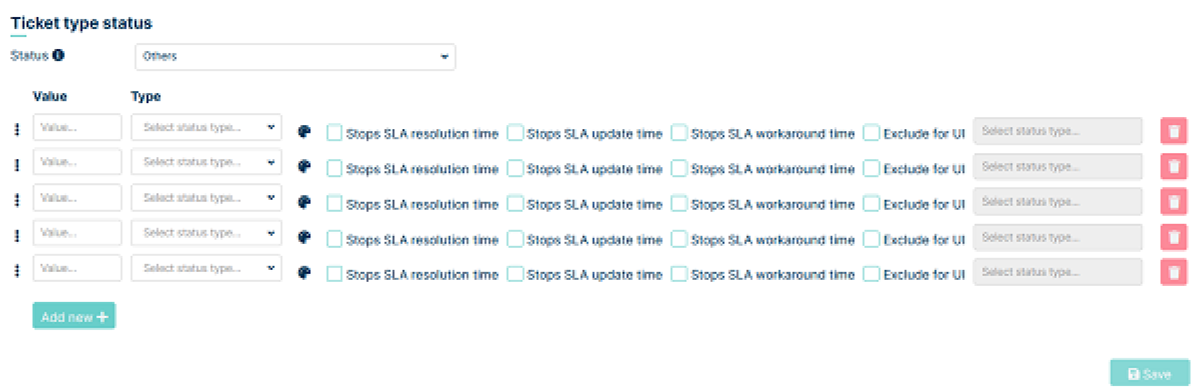


If you want to create some statuses first you need to choose the Ticket Type they will be connected with.



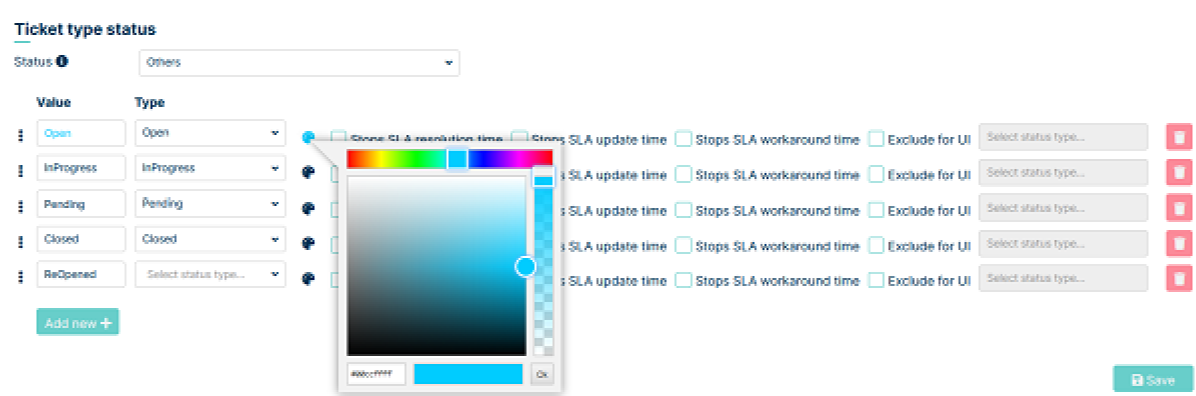
Once selected you need to add a couple of new statuses by clicking on the 'Add new' button.



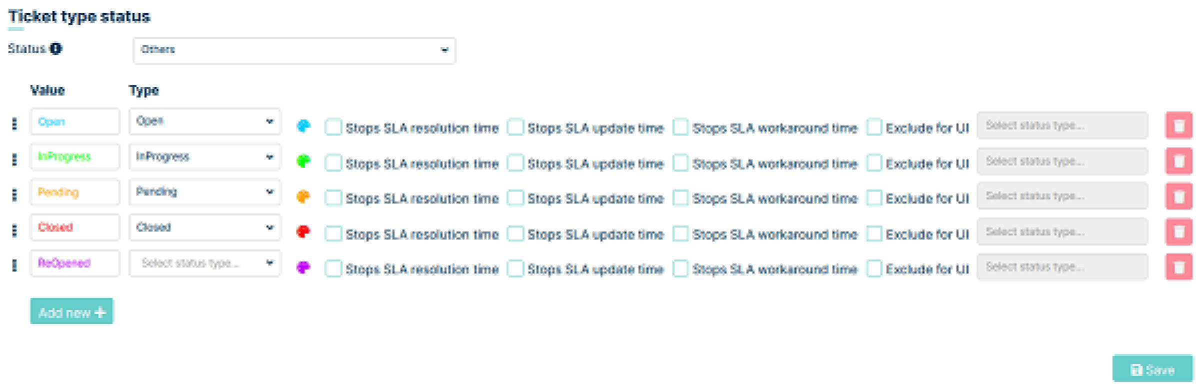


Now you have to name each status by adding 'Value' (any text) and select 'Status type' from the available list. At any moment you can add new status – just click the 'Add new' button. To delete any of the positions use the button.

For each status, you can also select a custom color. Click on the button to open a small window where you can choose a desired color from the palette.

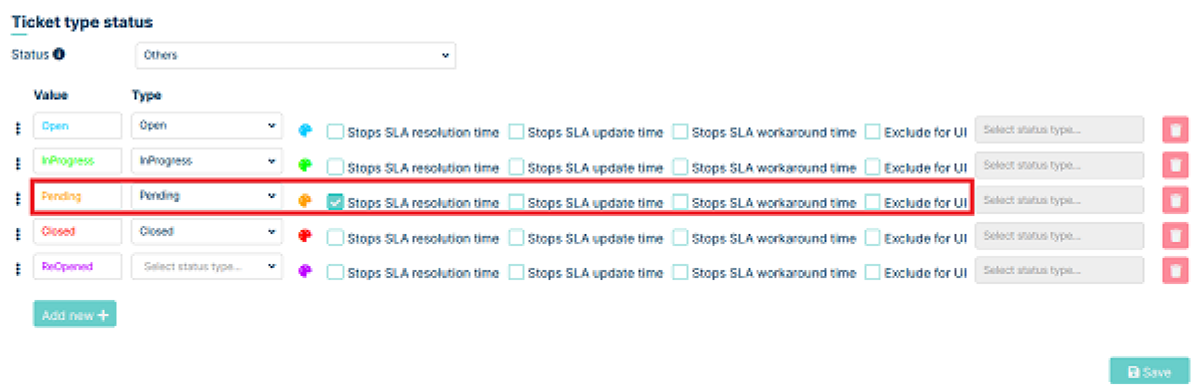


Now repeat that for each status and as a result, you will have colors for each status.

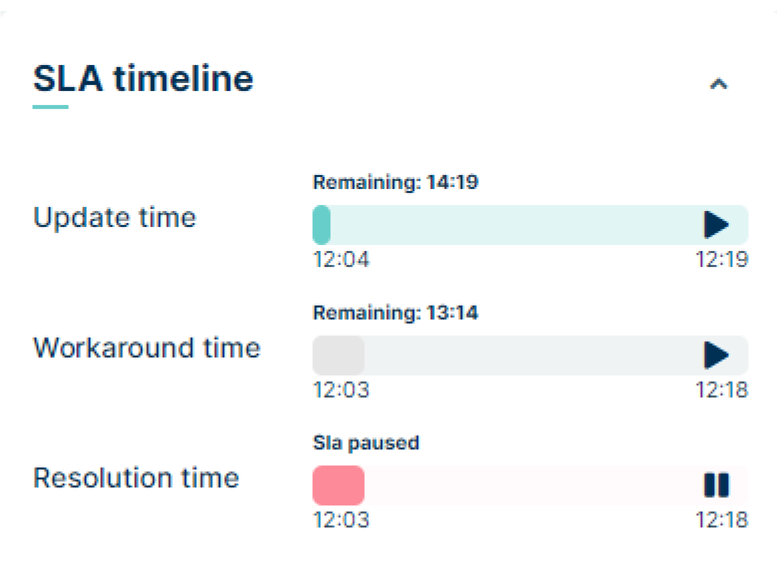


Those particular colors will be visible for Agent and Client in the 'Dashboard' view, on the list of tickets, in the 'Status' column.

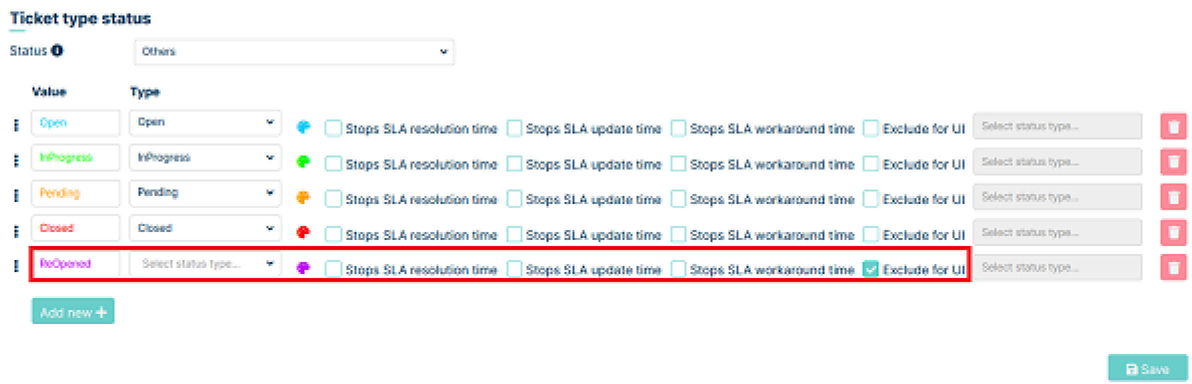
One of last thing in this part of the system is that for any of the statuses you can select 'Stops SLA resolution time' and 'Stops SLA update time'. It means that when a Ticket enters this particular status (either automatically or manually when an Agent changes the status) SLA timer for this ticket (if there is a Service along with SLA attached) will be stopped. For example, if a status has the checkbox 'Stops SLA resolution time' checked



and the status of the ticket is changed, then the resolution time counter will stop

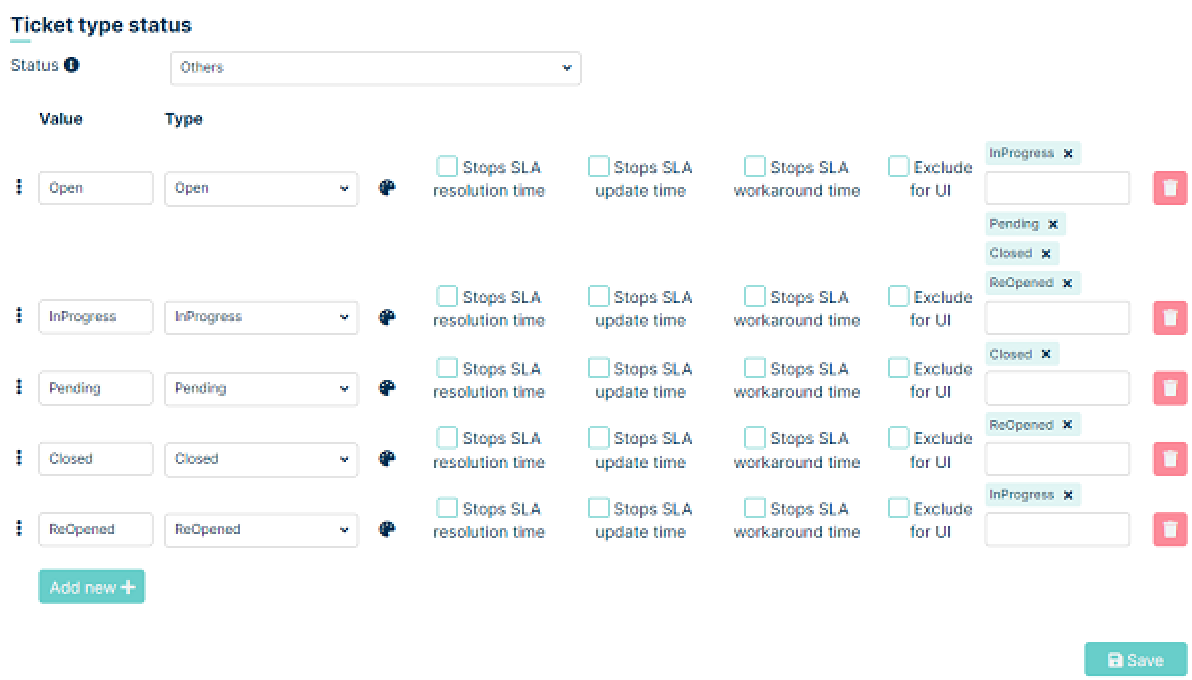


The last option is the 'Exclude for UI' checkbox. Checking this option means that the given status will be hidden from the available options on the ticket preview.



Once you finish, in order to save your changes, use the  button.

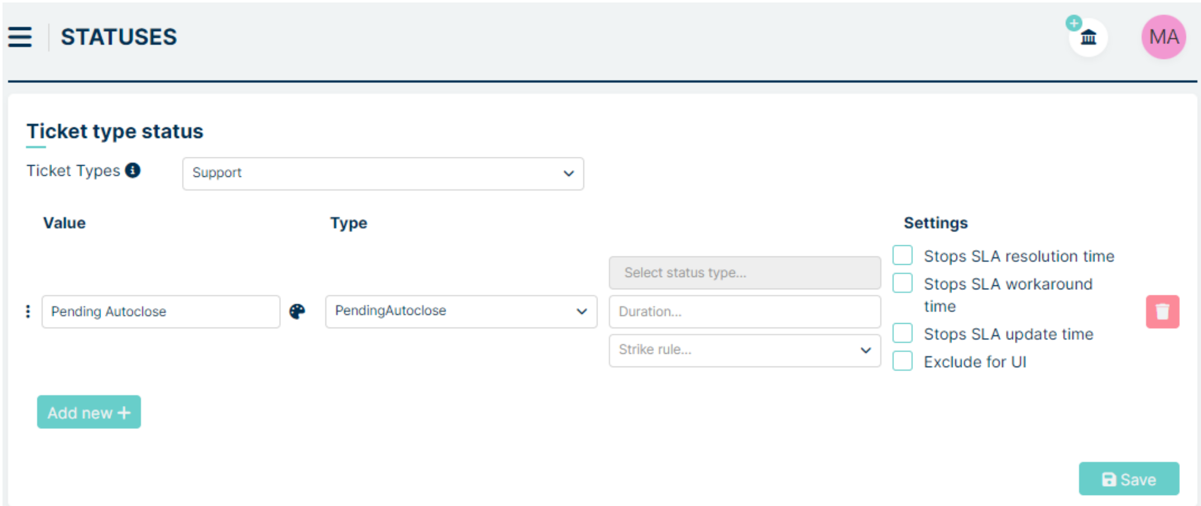
When the button to save is pressed, the option to specify workflow statuses will be unlocked.



This configuration indicates that you can only go from open status to InProgress status. From InProgress status, you can switch to Pending, Closed and ReOpened.

Pending autoclose

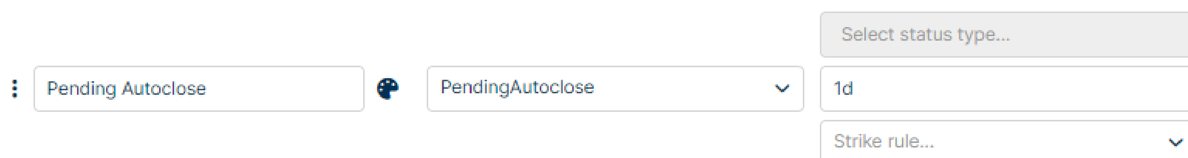
In Pending Autoclose you can specify how much time must elapse for a ticket in this status to be closed. For example - we configure the status for the selected ticket type



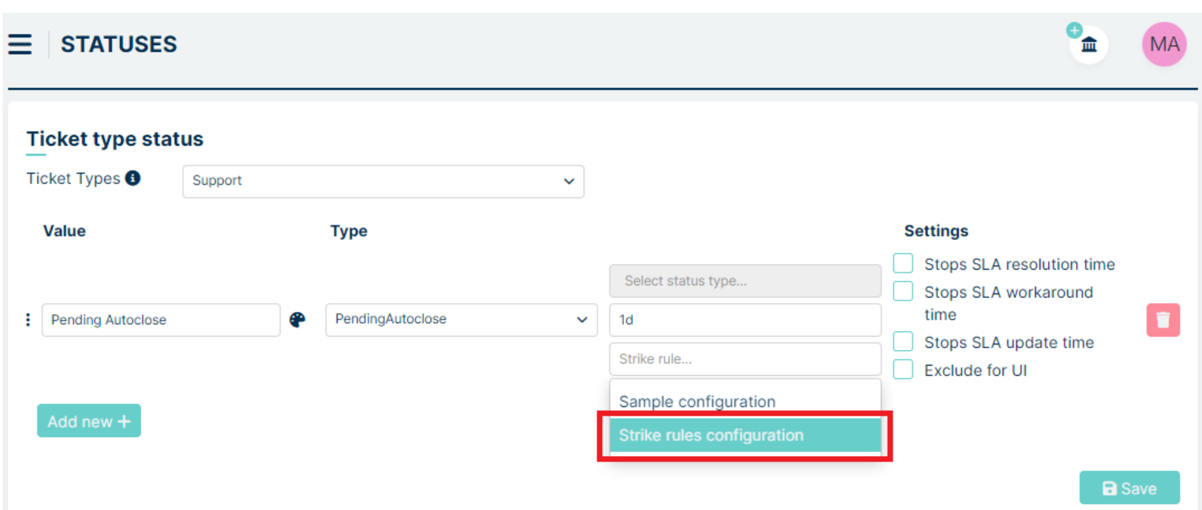
In the Duration field, we set the time that must elapse before the ticket is closed. You can set:

- 1m = 1 minute
- 1h = 1 hour
- 1d = 1 day
- 1w = 1 week

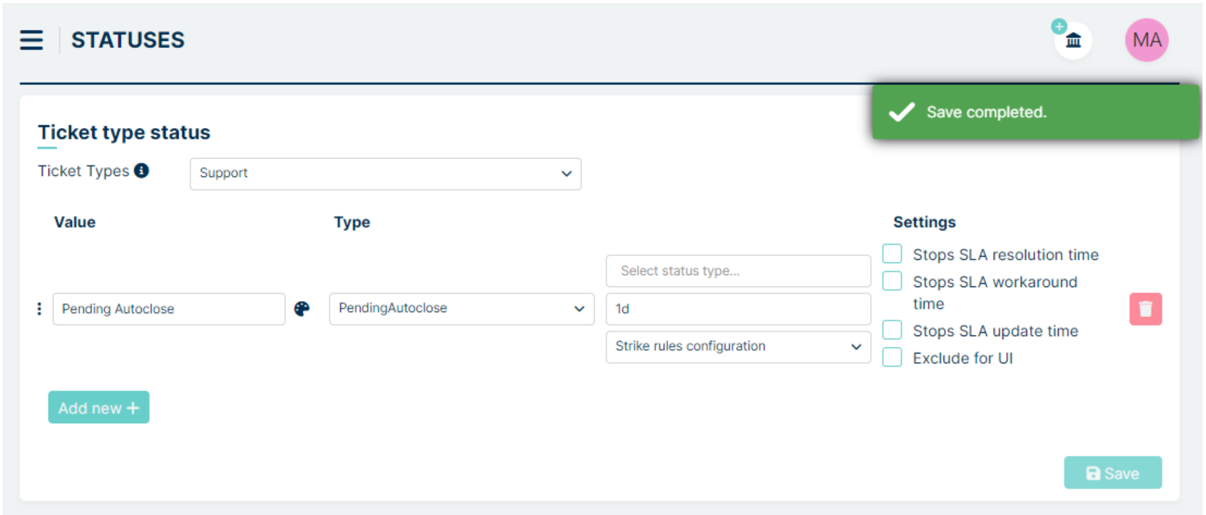
For example: 1w6h30m = 1 week 6 hours 30 minutes. Lets fill this field with 1 day (1d).



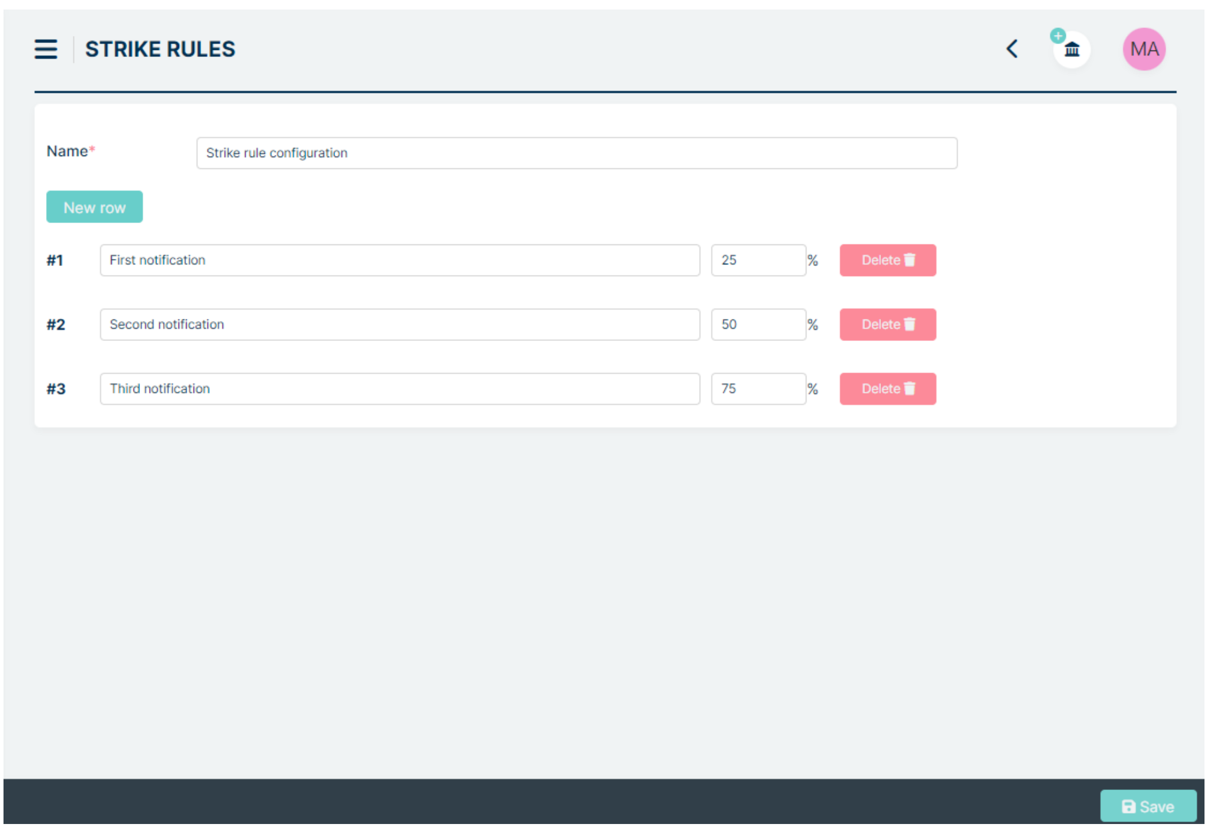
We are also able to establish **Strike rules**, which involve the configuration of notifications for this status as a certain amount of time elapses. To do this, first, we establish the configuration described in the **Tickets** → **Strike rule** section *(click here to visit)*. Then we proceed to the Pending Autoclose status we want to set, and after clicking on the Strike rule dropdown menu, we select the configuration we have set.



After clicking the  button, the setting is saved.



When a ticket transitions to Pending Autoclose and its status isn't changed within the predetermined time frame, the ticket will be closed automatically. Additionally, designated recipients will receive reminders according to settings in Notifications and based on the percentage of time elapsed, as configured in the Strike rule. For instance, if we've chosen a configuration with three notifications, they will be sent according to the following example schedule saved in **Strike rule** section:

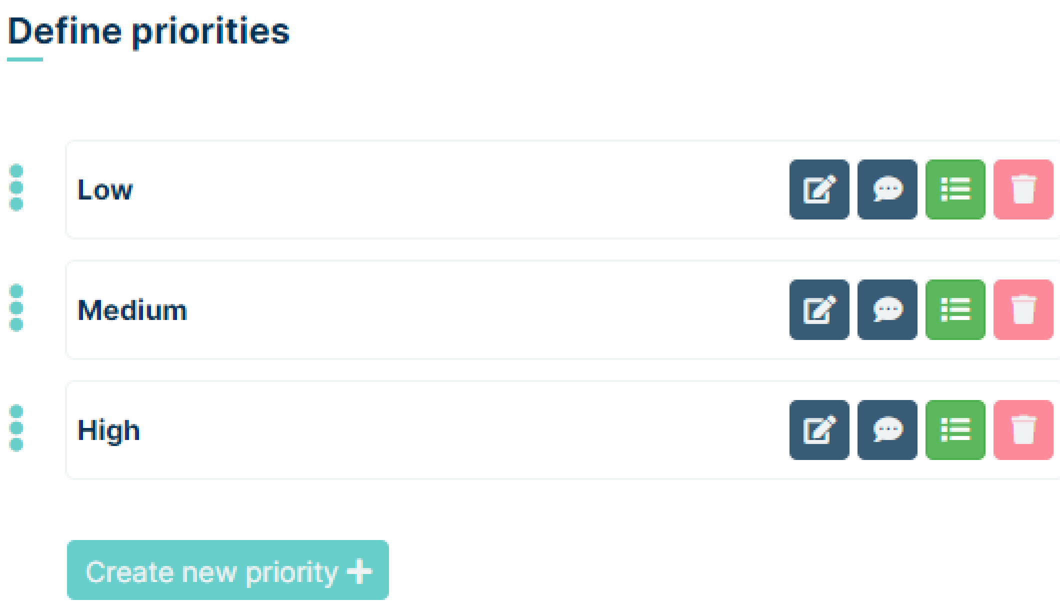


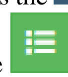
This means that reminders will be sent respectively after: • 6 hours (first reminder) • 12 hours (second reminder) • 18 hours (third reminder)

The notification configuration is described in the **Notifications** section *(click here to visit)*.

5.7.4 PRIORITIES

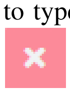
In this part of a system, you can add and manage all of the priorities which can be added to SLA rules.



If you want to change the name of the priority press the  button. If your priority needs a description, you can add one by pressing the  button. By pressing the  button, you can assign the appropriate priority to the ticket type.

At the bottom of this view, you will find one button 

. It is used for creating and adding a new priority to the structure. Once you click on this button a new position will appear right below the last one already existing.

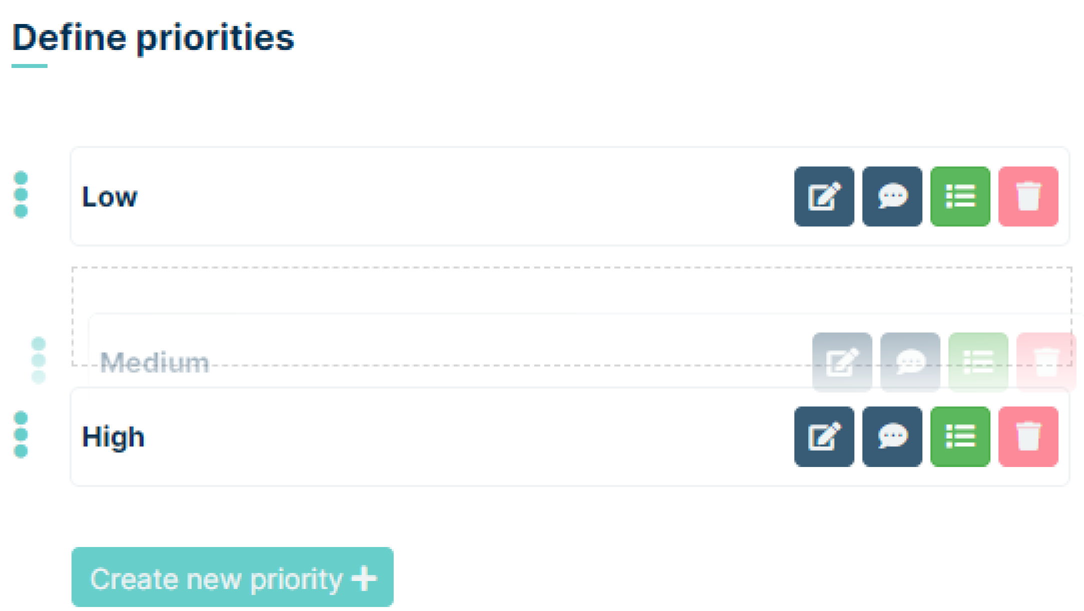
Now, you only need to type the right name for this queue. If you want to delete the name of the parameter you're creating, click on the  button.

To delete any of the positions use the  button on the right side.

If you want to save your changes, make sure you are done with everything and use the 

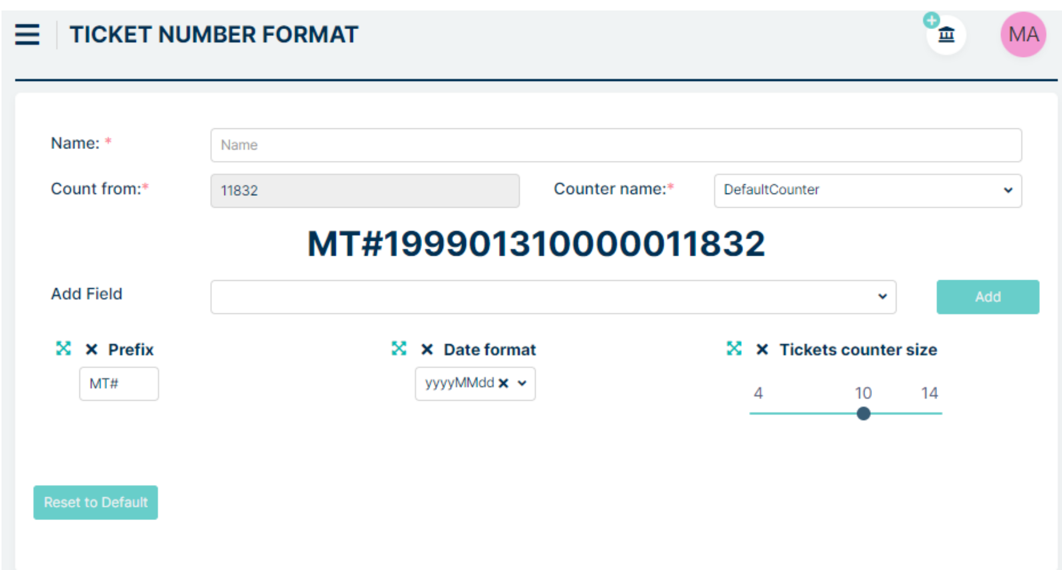
button located in the bottom right corner of the view.

Changing the order the priorities are displayed is done in the same way as it was in the Queue section. Just use the  button and move (drag & drop) the desired priority to the new place.



5.7.5 TICKET NUMBER FORMAT

In this place, you can set up your unique Ticket number pattern.



The ticket number is built from a couple of parts, which you can easily change:

- **Name:** This is where the admin enters the name of the ticket number format
- **Count from:** This field shows at which number the countdown will start, which is configured in the **Ticket number counter** tab
- **Counter name:** In this field, the admin selects one of the options created in **Ticket number counter** tab. A preview of the selected option can be found in **Count from**
- **Prefix:** a unique identifier for your company, for example for Mint it can be **MT** or **MINT**
- **Date format:** means date when the ticket was created, for example in **year/month/format**

- **Tickets counter size:** means how long the ticket counter should be. Please take notice that this number will be incrementing from 1 to xxx (the newest ticket) and it will not be reset each day. When you notice that the pull of available numbers is close to ending you can change it simply by changing the value of the **Ticket counter size**.

In addition to these three fields, you can add two more by selecting them from the list and then clicking Add button. Additional fields:

- **Pin:** In this field you select how long you want the pin to be. The possible length starts at 4 and ends at 10. These numbers are a random number.
- **Separator:** Here you can add a separator consisting of three values. There can be special characters like '/', '-', '|' etc. You can add up to 6 separators to your configuration.

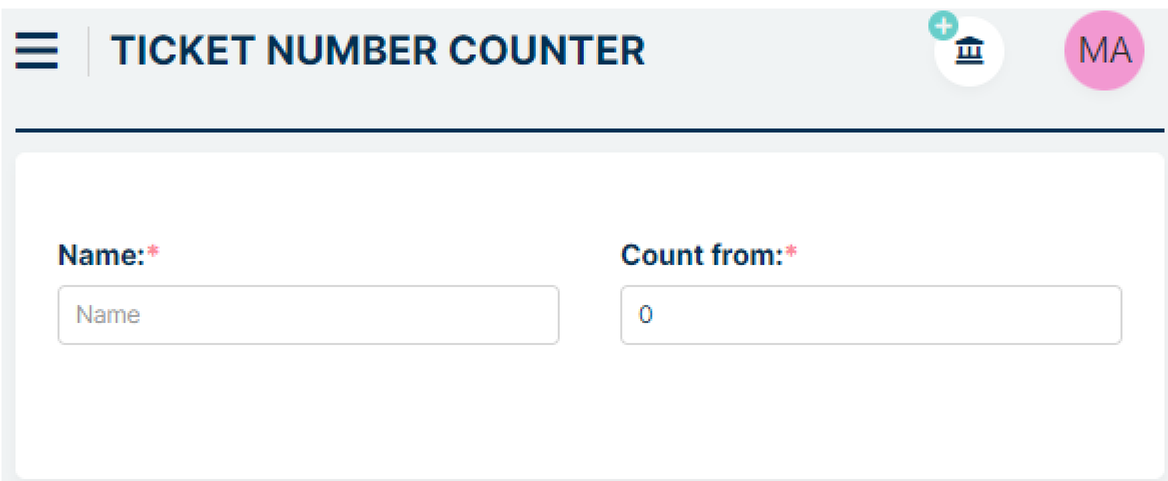
When you make too many changes and want to go back to the default settings just press the Reset to Default button.

Also, at any moment you can look how the Ticket number would look like. Each time you make any changes it will be changed in real-time to show you the final result.

Generated ticket number: **MT#19990131000000000000987**

5.7.6 TICKET NUMBER COUNTER

This section of the system shows all created Ticket number counter. To add a new counter, press the + button.



Two fields must be completed on this view:

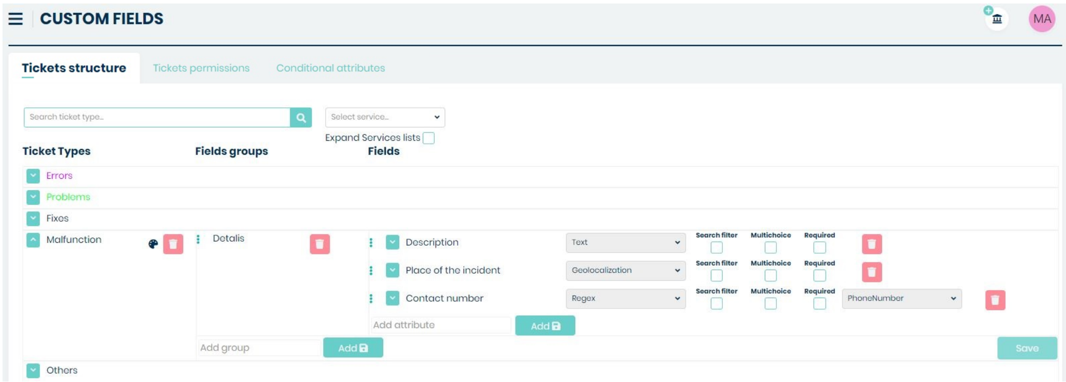
- **Name:** This is where the admin enters the name of the ticket number format
- **Count from:** In this field, the admin determines at what number the request number will start counting down.

To complete the counter configuration, press the Save button.

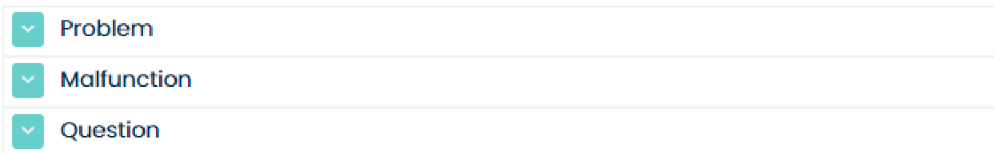
5.7.7 CUSTOM FIELDS

TICKETS STRUCTURE

Here you can customize the whole structure for Ticket Types along with its groups of Attributes and single attributes.



By default, the content of each Ticket Type is hidden and you only see the Ticket type name.

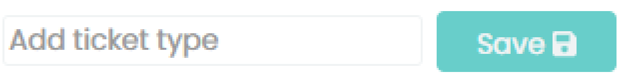


If you want to see the full content of a Ticket Type you need to click the  button, located on the left side of the ticket type name.

Ticket types

You can create different ticket types like "Question" or "Complaint", '1st level of support' and also types for ITSM processes like: "Service Request", "Incident", "Problem" and "RFC" (Request For Change).

To add a new Ticket type just click on the empty field 'Add ticket name', type the desired name, and hit 'Enter' on your keyboard.



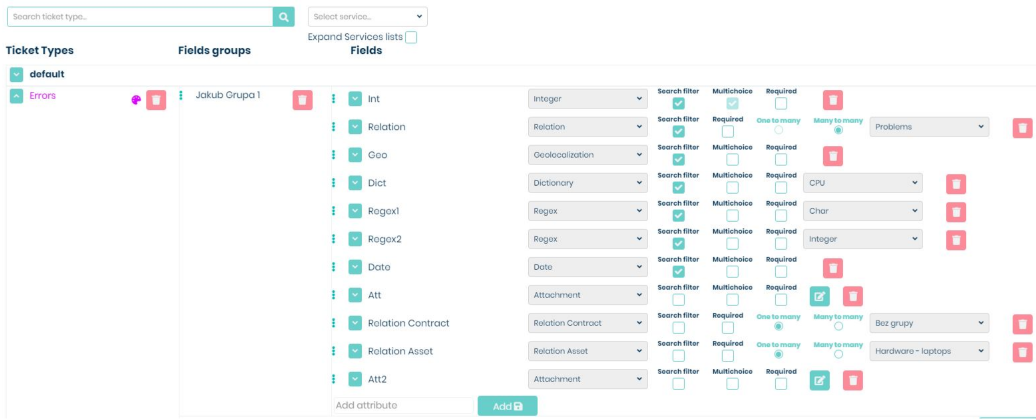
You can also look for a specific Ticket type by using the search field. Just type the name of the ticket Type you're looking for and hit 'enter' on your keyboard.

To select a service, press the 

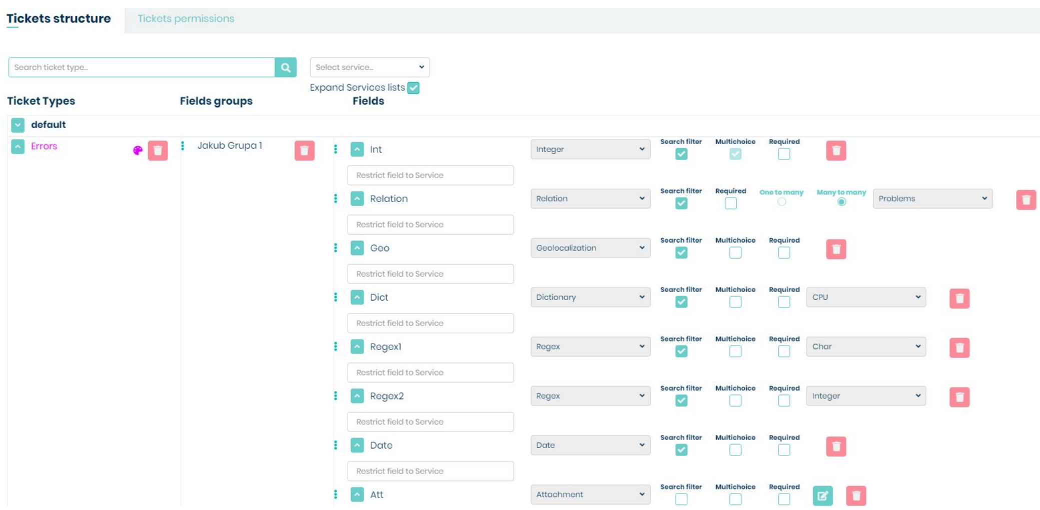
button. Then the whole list of services will be displayed, just select one of them.

To expand services on a ticket type press the checkmark next to 'Expand Services lists'.

Effect before selection:



Effect after selection:

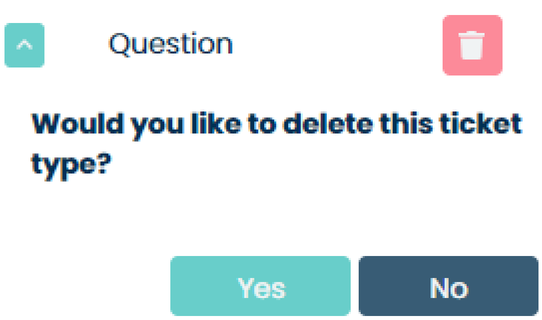


You can now restrict the field for the service of your choice by clicking on the 

button and selecting the appropriate service.

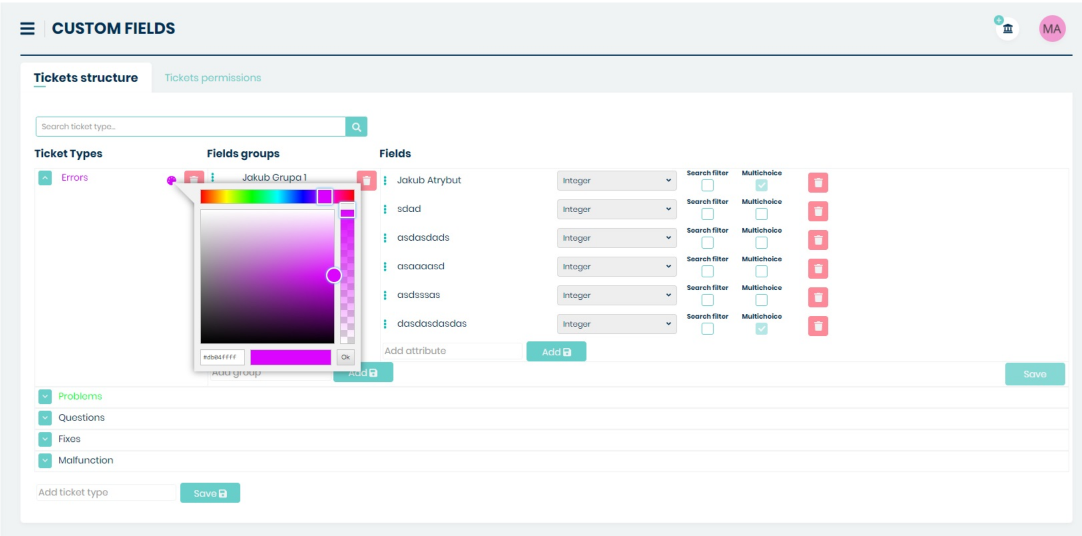
If you want to rename already existing ticket Type just click on its name, make some changes and click Enter.

If you want to remove it just click on a trashcan icon  located on the right side. In the new window, you will be asked to confirm the action.



Click 'Yes' and the Ticket Type will be removed. Remember that deleting a ticket type means also deleting all custom Groups of attributes and single attributes that you have added to this Ticket type.

For each ticket type, you can also select a custom color. Click on the  button to open a small window where you can choose a desired color from the palette.



Now repeat that for each ticket type and as a result, you will have colors for each ticket type.

Groups

Creating and editing groups works almost the same as it is for Ticket types. In order to create a new group click on an empty field 'Add group' and type the desired name.

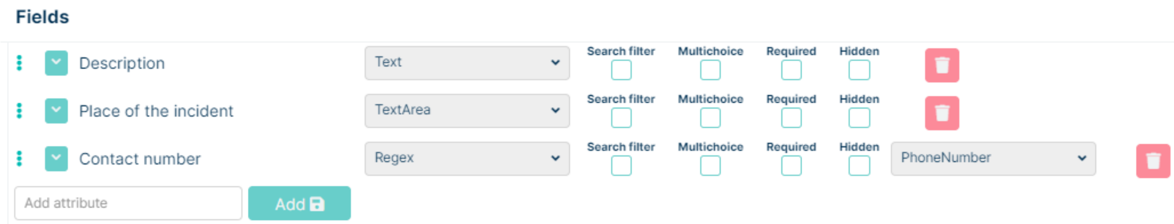
Now click enter on your keyboard. Try to save the changes by clicking  on the right side of the screen. You will see information saying "*Group must have at least one attribute*". Before you'll be able to save a group you need to create at least one attribute.

To change the name of the group just click on it, type a new one, and accept the change by clicking enter.

To remove the group use the trashcan icon  on the right side. Please notice that along with a group you will delete attributes that are inside this group.

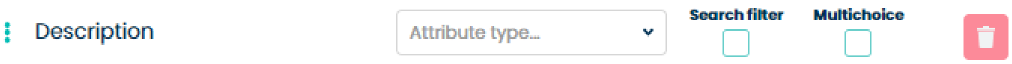
Fields

Those fields are called attributes that you will use to add detailed information for your tickets. Each group must have at least one attribute. Without it, you won't be able to save a new, fresh group.



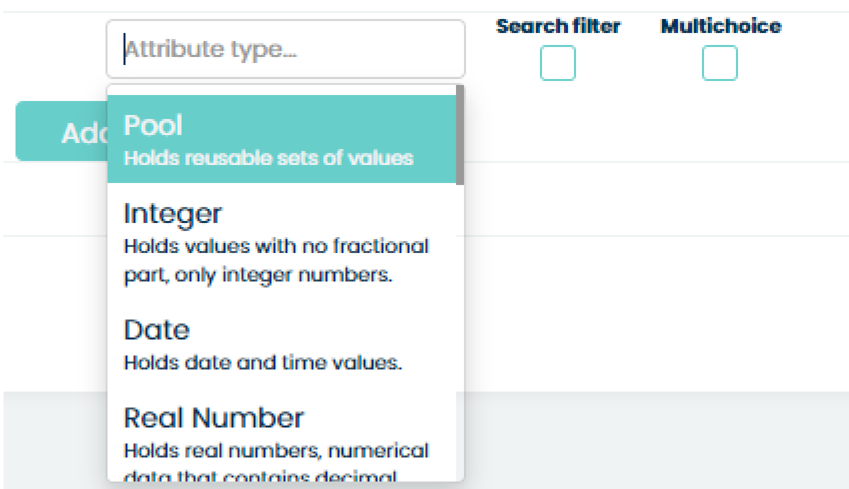
Adding and modifying attribute name as well as removing the whole attribute works the same way as for ticket types and groups.

However, after typing and accepting a name for the attribute you will have to choose attribute type, decide if you want to be able to search by this attribute in the list of tickets ('Search filter' check-box) or be able to select more than one value of the attribute ('Multichoice' check-box).



MINT Service Desk includes a lot of different types of attributes. While selecting 'Attribute type' you can choose it from the long list.

The available types are "Pool", "Integer", "Date", "Real Number", "Text", "Relation", "Date Scope", "Num Scope", "Geolocation", "Text Area", "Attachment", "Radio", "Checkbox", "Label", "Hypertext", "Existing" "Subscribed Receiver", "Regex", "Dictionary", "Relation Asset", "Relation Contract", "Relation Company" and "Relation User"

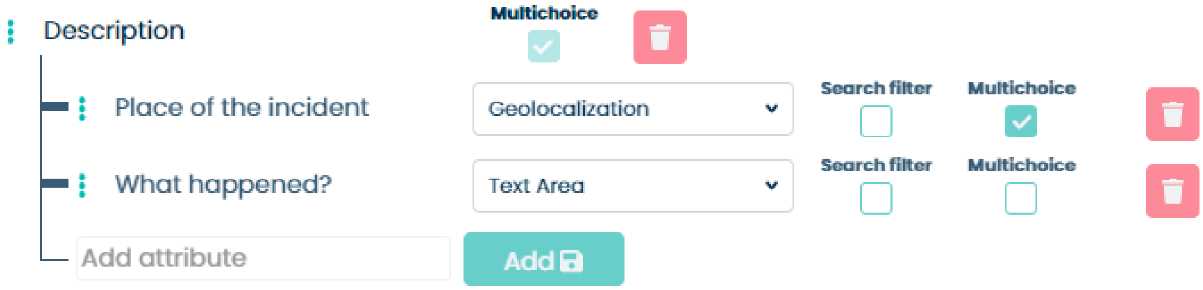


POOL

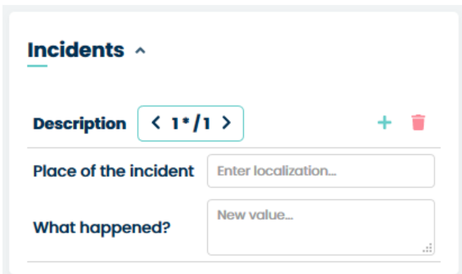
With 'Pool" you can create more than one (as many you want) small groups of attributes.

For example: if you want to be able to add additional information (Place of the incident and incident description) about more than one incident, you can add a new attribute, rename it to 'Description' and mark 'MultiChoice', then select 'Pool' from the list of available types.

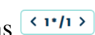
Now add two attributes, name them 'Place of the incident" and 'Impact level' and as a type choose 'Geolocalization' and 'Text area'.

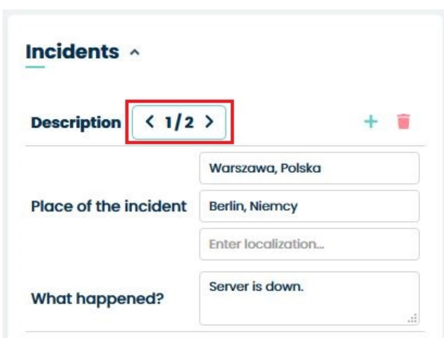


Now if the user (Agent or Client) will see the following attributes allowing to add incidents description one after another.



To add another (second/third etc.) incident just click the  button and a new empty page will be opened allowing you to type those attributes once again but this time for the second incident. You can also delete any of them with the  button.

If you want to move between those 'incidents' use the navigation options .



INTEGER

This type allows you to enter an integer number which is the number without fractional components. For example, 1, 6, 77, and not 1.2, 6.5, 7.6.

DATE

This type allows you to enter an date. The value will be displayed in the format "dd.mm.yyyy hh.mm". If you do not want hours and minutes in your date field then press the  button and check the "No Time" checkbox.

REAL NUMBER

This field allows you to enter a real number which is the number wit fractional components, for example, 1.44 or 23.95.

If you want your number to have more numbers after the decimal point, for example, 5, then press the  button and enter the number you want in the step field.

TEXT

With ‘Text’ you can create a simple field where you can add some text (however with limited space to show). Remember that, unlike when using the ‘Text area’, you will only have one line available for your typed text to be displayed. In this field, you can additionally specify the maximum allowable number of characters a user can enter. Simply click on the  button and set a number between 1 and 150.

RELATION

With “Relation” you can create an attribute related to a Ticket type or Asset Category.

If you add a ‘Relation’ type attribute while creating the structure for Ticket Types (Admin > Tickets > Custom fields > Tickets structure) you will have to select one from already existing Ticket Types.

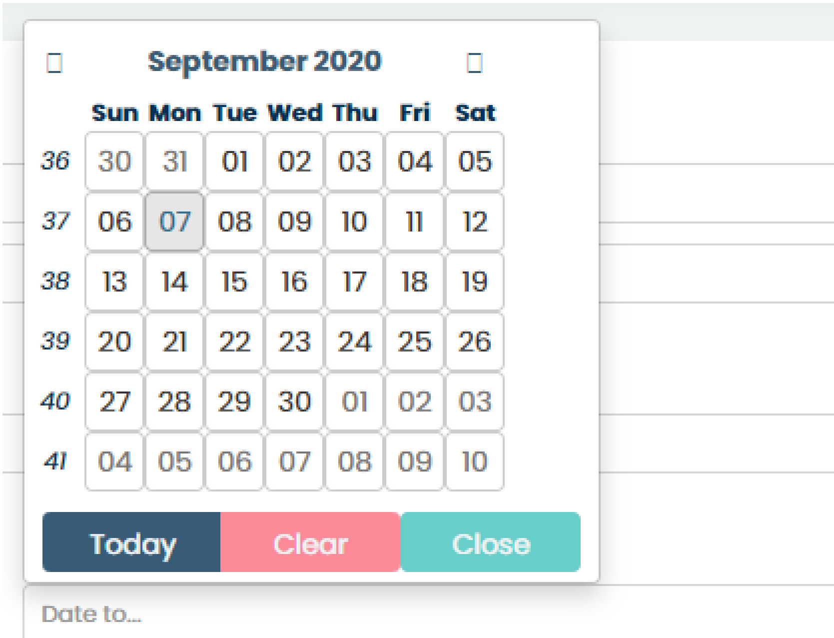
If, on the other hand, you add a ‘Relation’ type attribute while creating the structure for Assets categories (Admin > Assets > Assets definition > Assets structure) you will have to select one from already existing Assets categories.

Also, while doing that, you can select one of two available types of relations:

- One to many
- Many to many

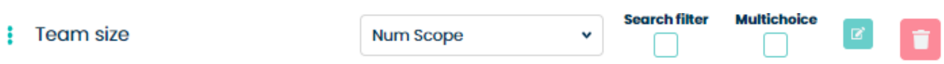
DATE SCOPE

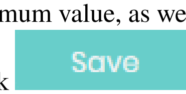
This type of field allows you to create a date range like: “Date from” and “Date to”. You can specify each of those dates with a simple calendar.



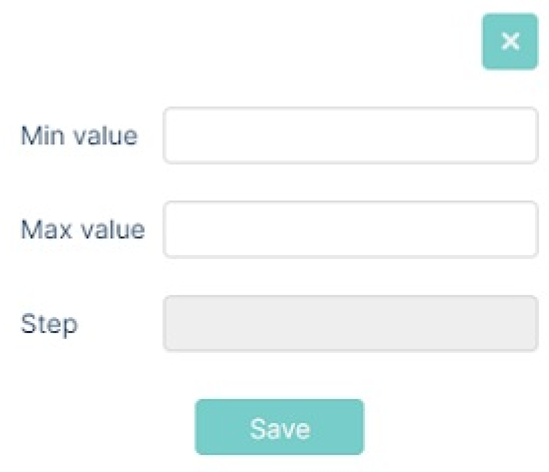
NUM SCOPE

This type of field allows you to choose a value from the defined range.

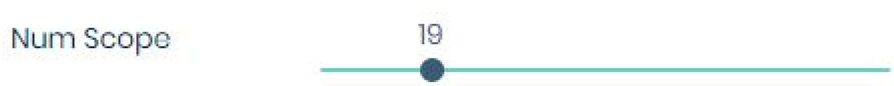


You won't be able to save any changes until you specify all of the information: minimum and maximum value, as well as a 'Step'. To do that click the  button. Now, in the new window define those values and click 

.



After you do that a user (Agent or Client) will be able to select one particular value from the value range with a 1by moving the selector to the left or right.

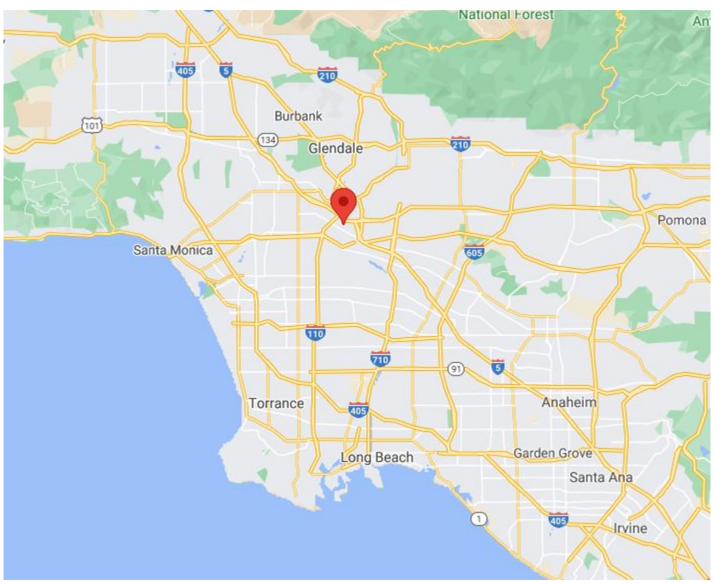


GEOLOCALIZATION

This type of field allows you to define locations by longitude and latitude. The user (Agent or client) needs to type the name of a place in 'Address' field and enter the longitude and latitude in the following boxes.

Example, I want to write down the address to Los Angeles:

Then he will be able to either click on to be directed to Google Maps webpage with information about this location.



TEXT AREA

With ‘Text Area’ you can create a large field where you can add some text - more than just one line. A text area can hold an unlimited amount of text.

Also, you can enlarge this field, just grab the right bottom corner and drag it down.

ATTACHMENT

If you want to attach an attachment to your application you can do so in the Attachment field. The initial extensions are: pdf, doc, docx, odt, rtf, txt, jpg. If you need more extensions then it can add it at the press button.

RADIO

The radio field consists of a true/false selection.

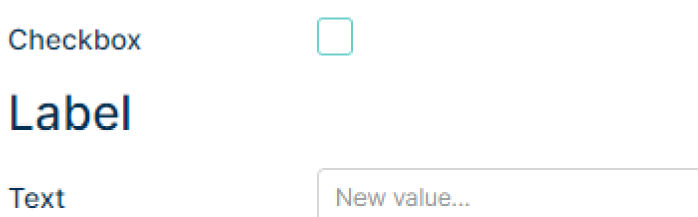
Remember that you can only select one option. It is not possible to select true and false at the same time.

CHECKBOX

This field is used to add a checkbox type field to the configuration. By default, this field is unchecked. If you want the checkbox to be checked from the very beginning you can change this by pressing the button.

LABEL

If you need a separation between two custom fields then use the Label field.

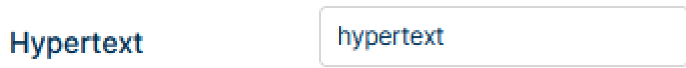


If you need a different font size then press the button. You can choose from these sizes: 12, 14, 16, 18, 20, 24.

HYPERTEXT

In this field you can store any kind of hyper text like URL, Path and others. Any text you write in this field will be converted to hypertext.

Type any text in field:

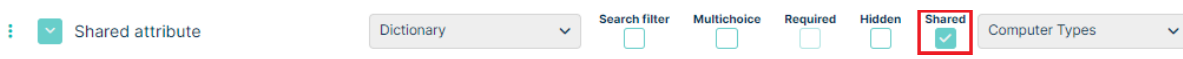


and you will have it in format like below

You can click on hypertext and will be redirected to specific page (if exists).

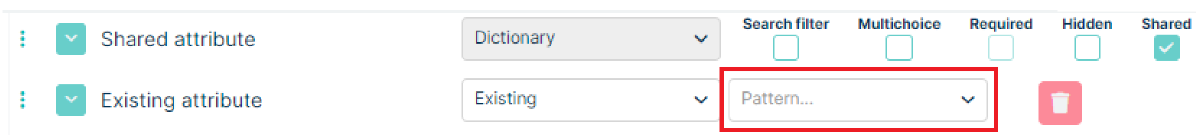
EXISTING

This field inherits all properties and value from another custom field in the ticket type that field belongs. To do it, the attribute that we want to inherit must have selected checkbox "Shared".

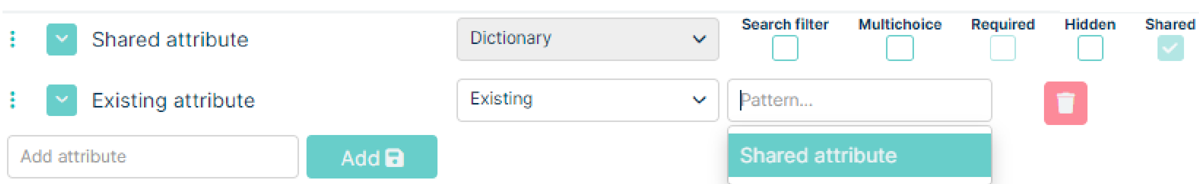


Let's make an example. We want to make attribute with type: "Existing" and inherit attribute properties like on picture above.

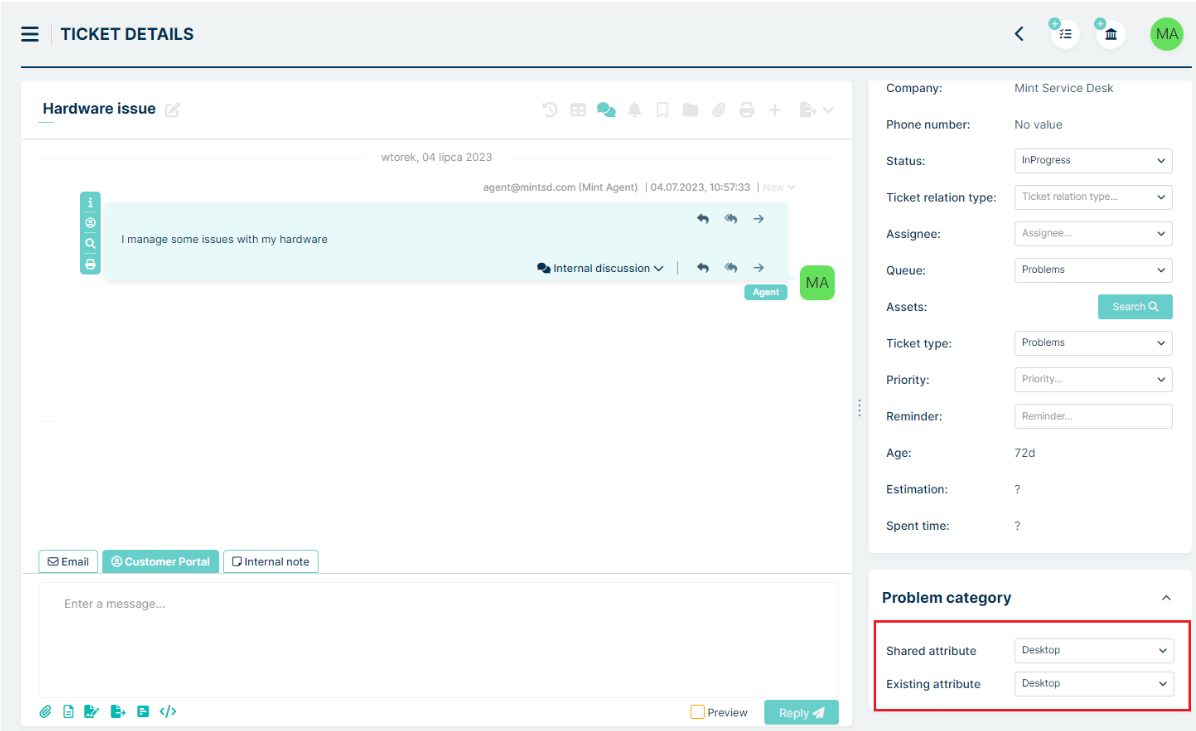
First create new attribute named for example "Existing" and choose correct type. The new field "Pattern…" appear



Click on it and you will see the list of available attributes (with "Shared" checkbox selected) that you can inherit



Choose the attribute you want from the list and save. Your existing field has from now the same attribute type and the same values. In our exmaple, Existing attribue has "Dictionary" type with "Computer types" dictionary assigned. If Agent or Customer will change any data in one of this field in ticket details and save, the other field will also iherit the changes, like on picture below

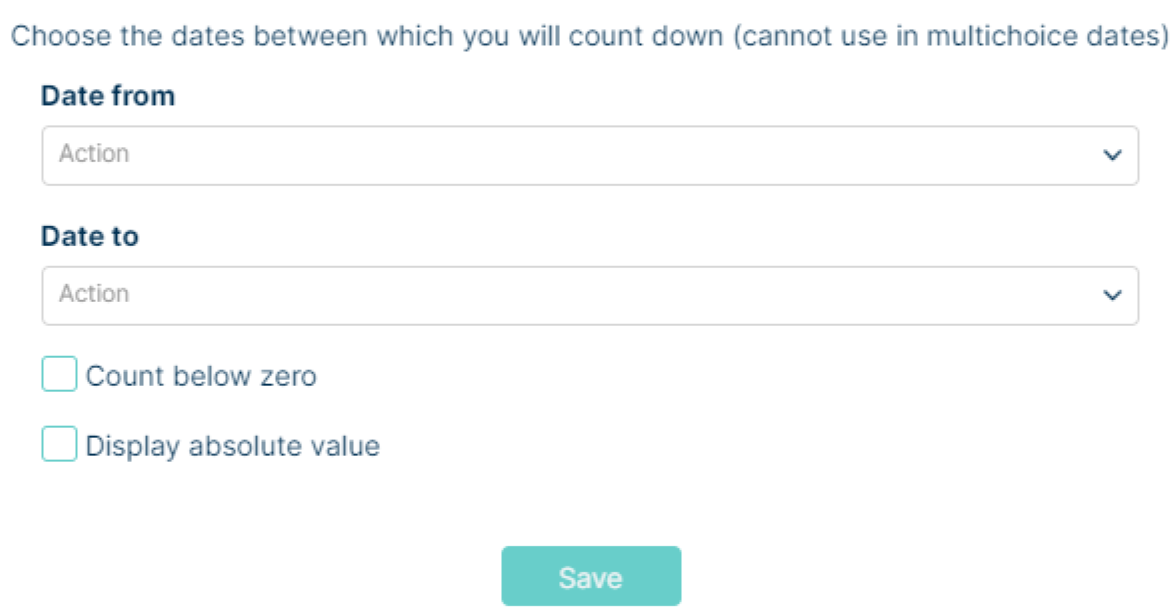


You can choose any other attribute types like “text”, “date” etc.

COUNTDOWN

Countdown field displays in the ticket details how much time remains between two dates. These can be values from “Date” type field or system values (such as Ticket Creation Date).

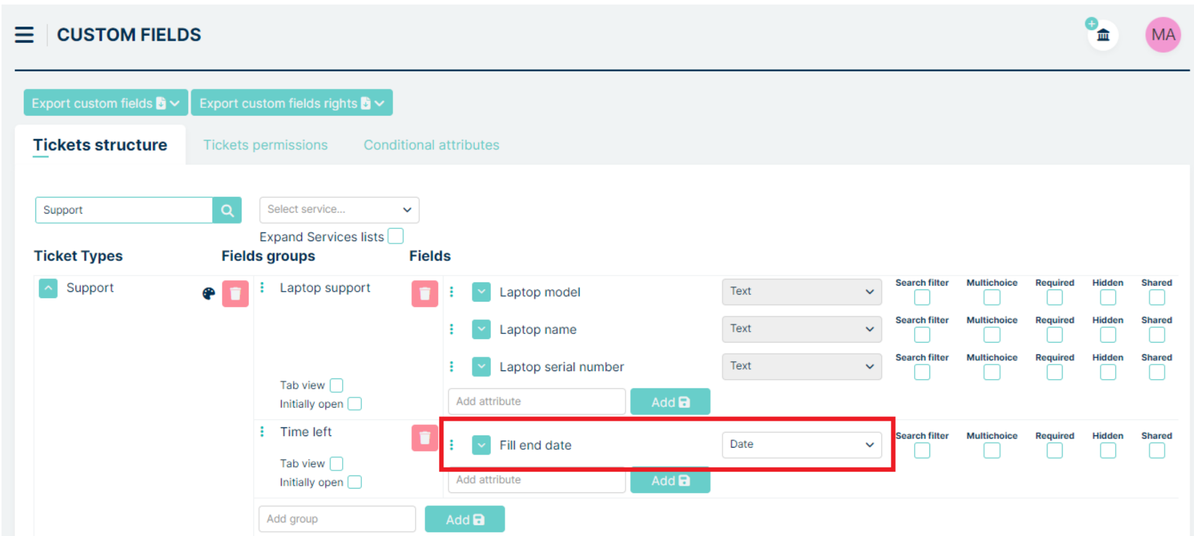
To configure this field, add it to the chosen ticket type and click the  button. The following modal appears:



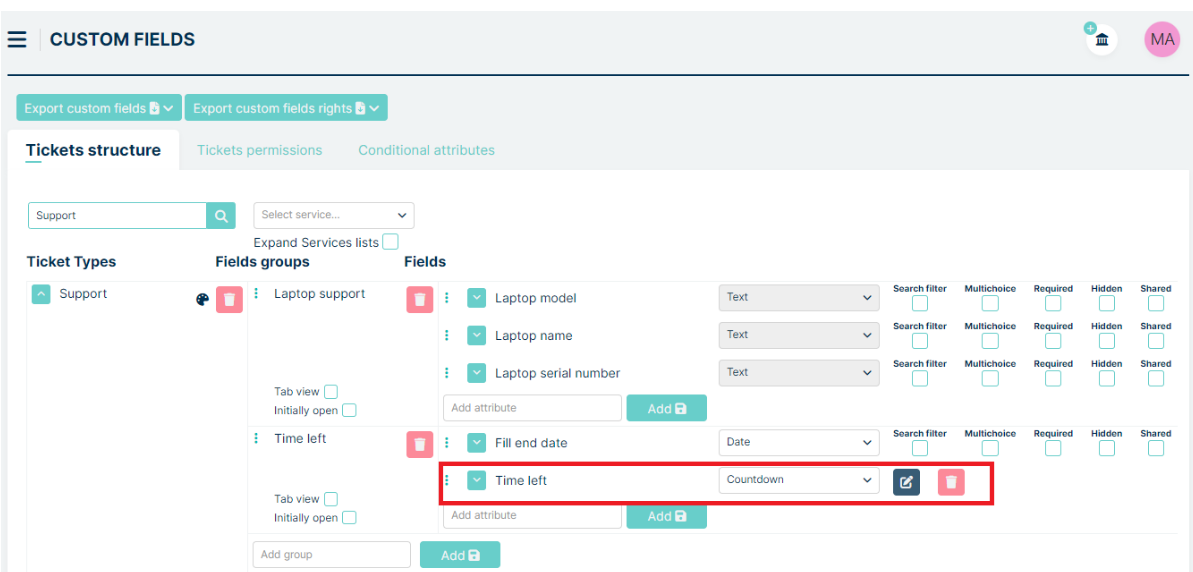
- Date from - Here we can select: “Now”, “Creation Date”, “Modification Date” or assign a value from a custom field of type “Date”
- Date to - Here we can select: “Creation Date”, “Modification Date” or assign a value from a custom field of type “Date”
- Count below zero - Check this box if you want the field to also show negative values, e.g. when the end time has already passed
- Display absolute value - Check this box if you want the displayed values to be non-negative

Let’s enter some example data. Suppose we want to display the remaining time to a specific deadline date in each ticket.

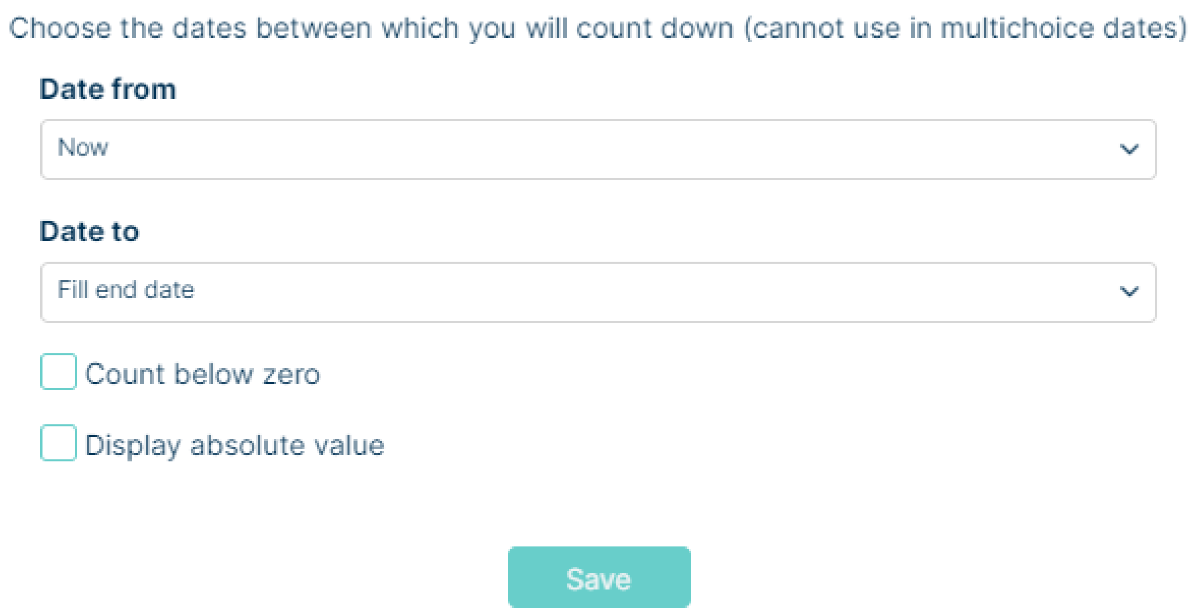
We configure custom field Date type:



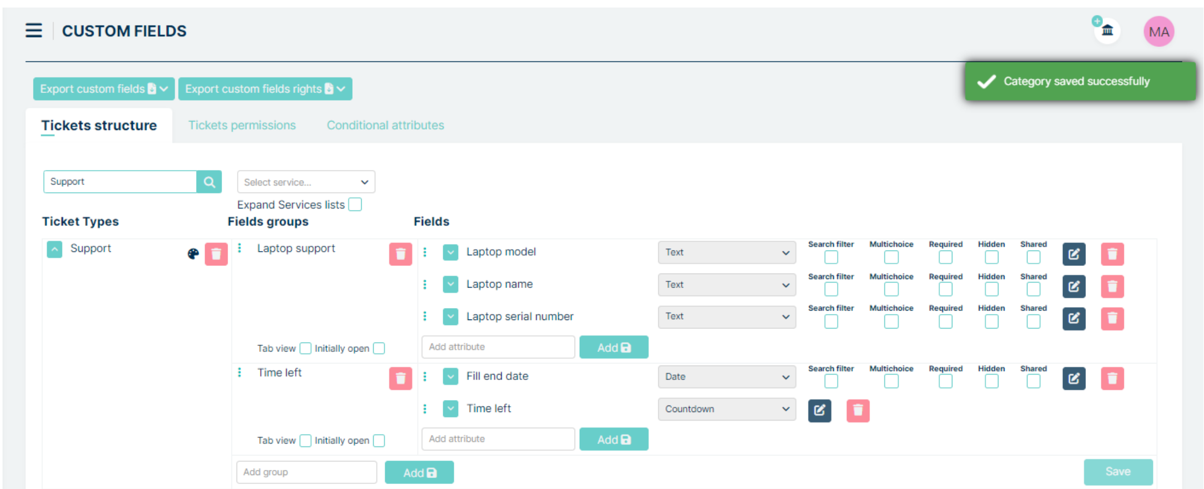
Next, we add a Countdown field



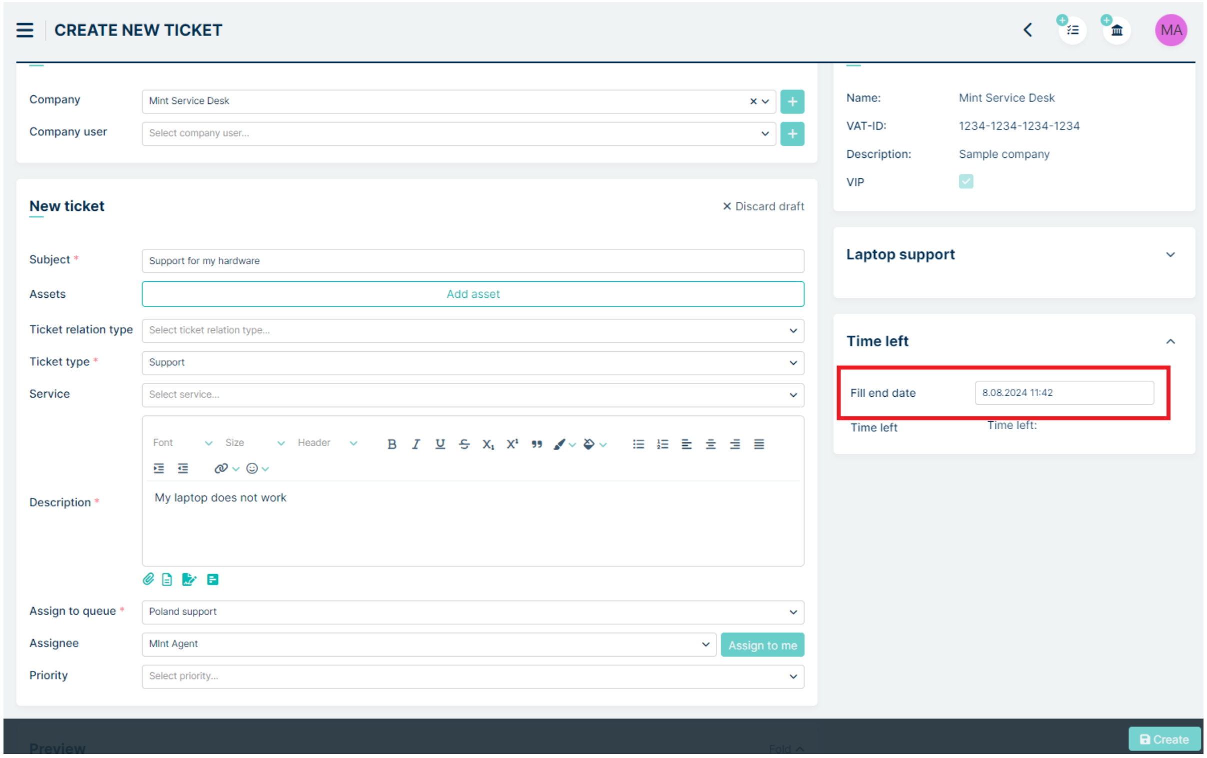
click , then assign “NOW” in the “Date from” and a custom field Date type in the “Date to” field.



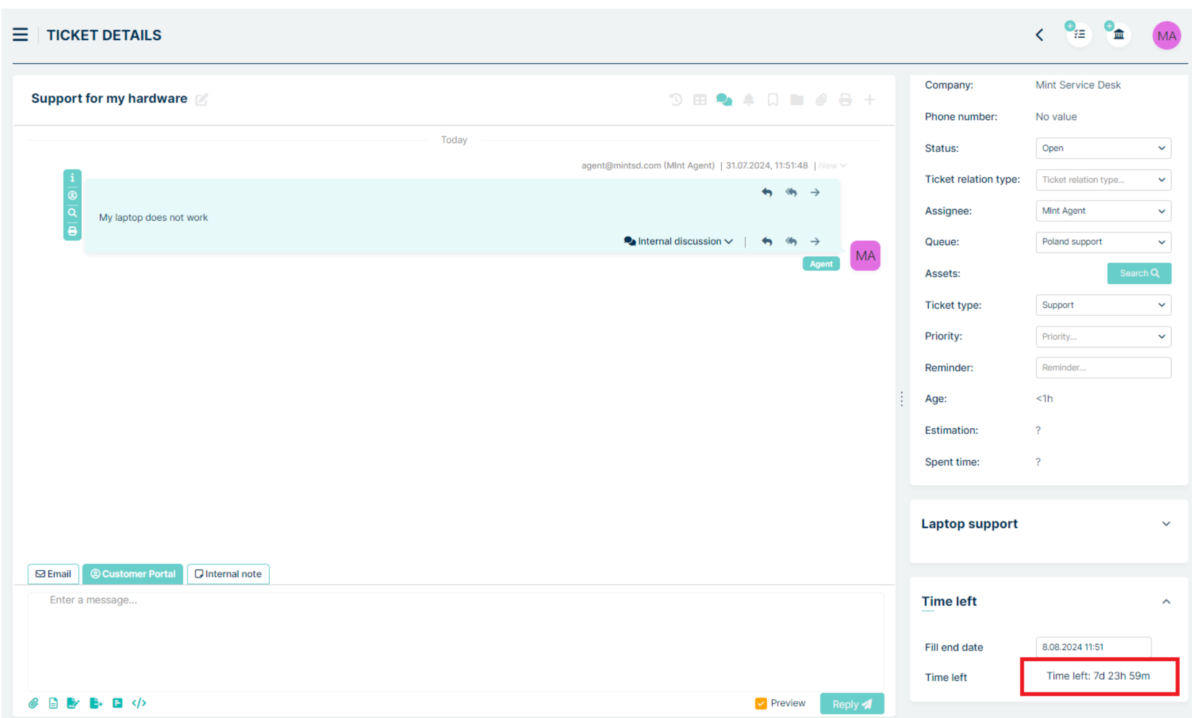
Finally, we save the entire configuration.



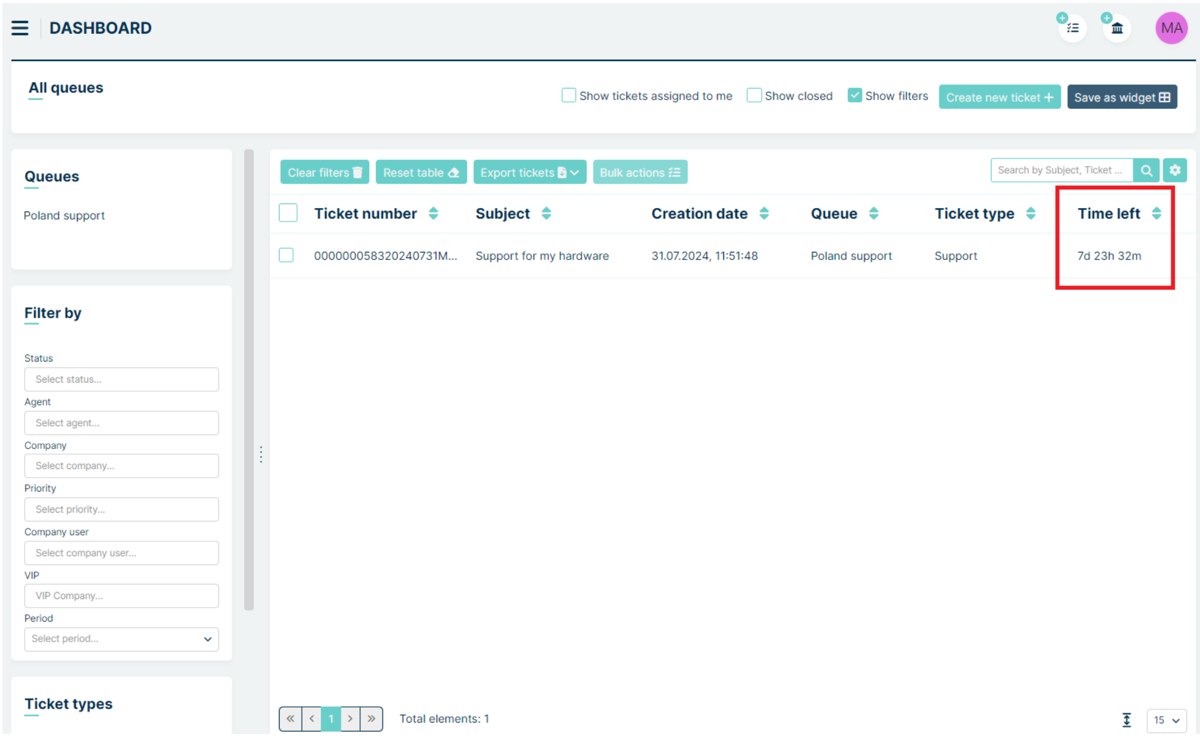
Next, we grant the agent permissions for the ticket type and the created fields. The agent then creates a ticket, filling in the "Date" field with a chosen future date.



After creating the ticket, the Countdown field displays the time remaining until the selected date.

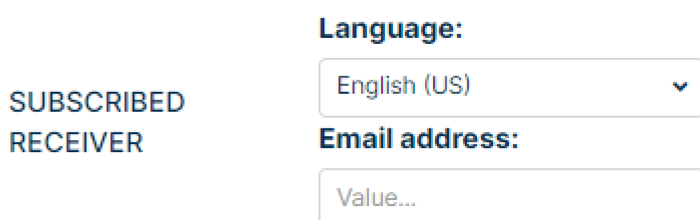


This field can also be displayed on the dashboard. To do this, an agent can add it as an additional column, or an administrator can set this column a default in the Searchable Columns under Settings -> General -> Tickets -> Ticket search default settings.



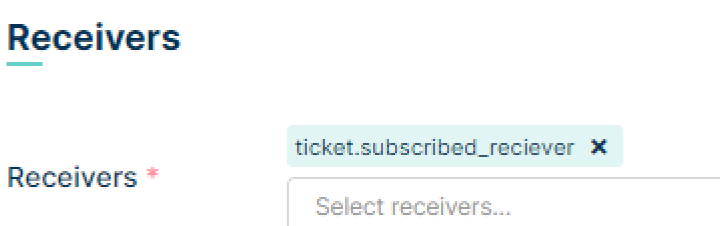
SUBSCRIBED RECEIVER

This field is used to subscribe to a particular application. This field consists of two fields Language and Email address.



In the former field, you select which language you want the notification to be sent in and in the latter field you enter the subscriber's email so that he/she will receive the notification.

Remember that for the field to work you must add the ticket.subscribed.reciever field to the selected notification in the Receivers field.



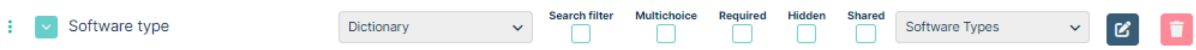
REGEX

With this type, you can choose one of the regexes defined, and then while filling the value it has to match the regular expression defined in the selected regex.

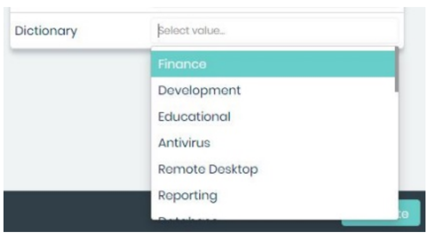
For example, if you choose 'email' Regex, a user (Client or agent) will have to type the correct email address.

DICTIONARY

This option refers to the dictionaries which can be added and configured in the "Dictionaries' section. It takes a value from a predefined list of elements like a list to show in a dropdown field.

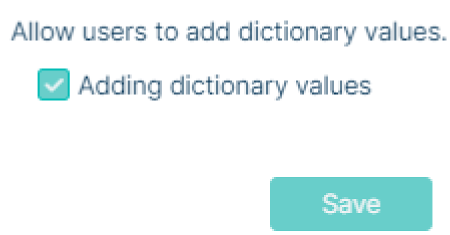


In the following example, we have chosen a custom-made 'Software types' Dictionary.



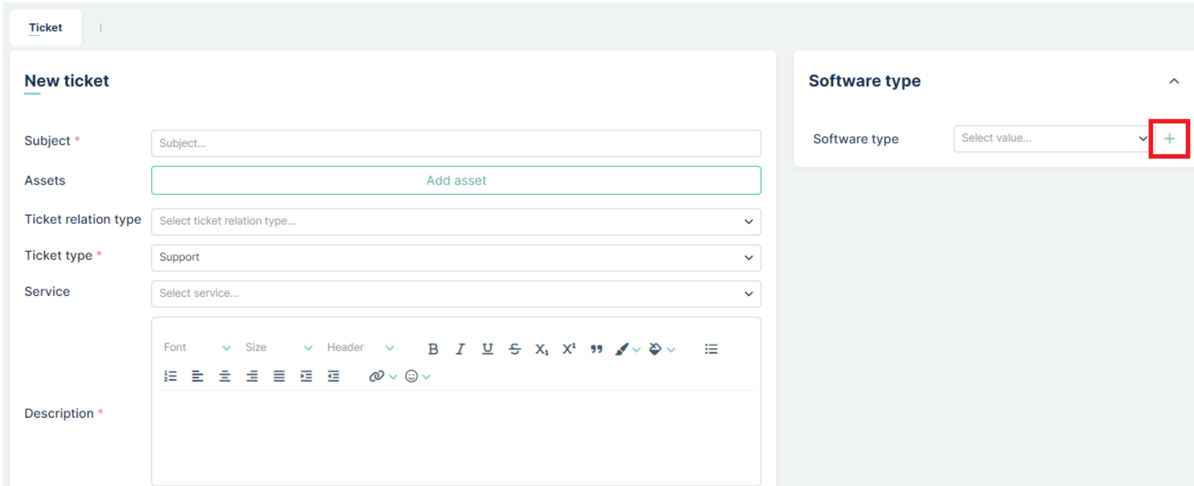
Now the user (Agent, Client) has to choose the desired position from the list. He is able to do this either while creating a Ticket in 'Create new ticket' view (if he chooses a ticket type that has a 'Dictionary' type attribute) or (if he has the appropriate rights given by the admin) in 'Ticket Details' view. Also, you can do this as well when creating (or editing) an asset if the Dictionary type attribute is attached to the selected Asset category.

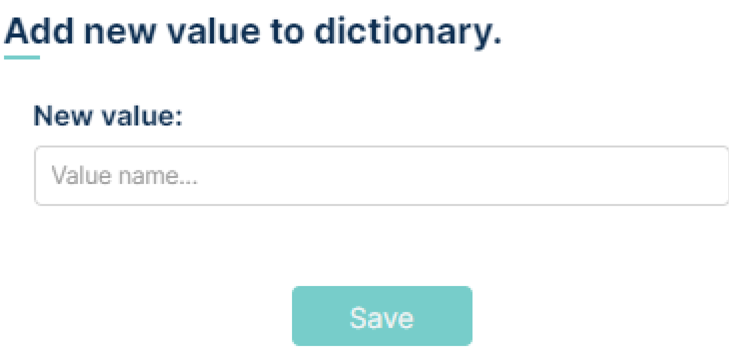
If you want to allow the agents to add new dictionary values while creating or editing a ticket, click the  button, and then check the checkbox Adding dictionary values.



Remember that agent role should have enabled "Expanding dictionary values" option by Admin in Users -> Roles

From now on, the agent has the ability to add new values to the selected dictionary.





RELATION ASSET

This field is used to determine the relation to the asset. After selecting this field as in the case of a regular relation, it is possible to choose between two:

- One to many
- Many to many

Then, in the Pattern field, you select what you want the relation to be for.

RELATION CONTRACT

This field is used to determine the relation to the contract. After selecting this field as in the case of a regular relation, it is possible to choose between two:

- One to many
- Many to many

Then, in the Pattern field, you select what you want the relation to be for.

RELATION COMPANY

This field is used to determine the relation to the company. After selecting this field as in the case of a regular relation, it is possible to choose between two:

- One to many

- Many to many

Then, in the Pattern field, you select what you want the relation to be for.

RELATION USER

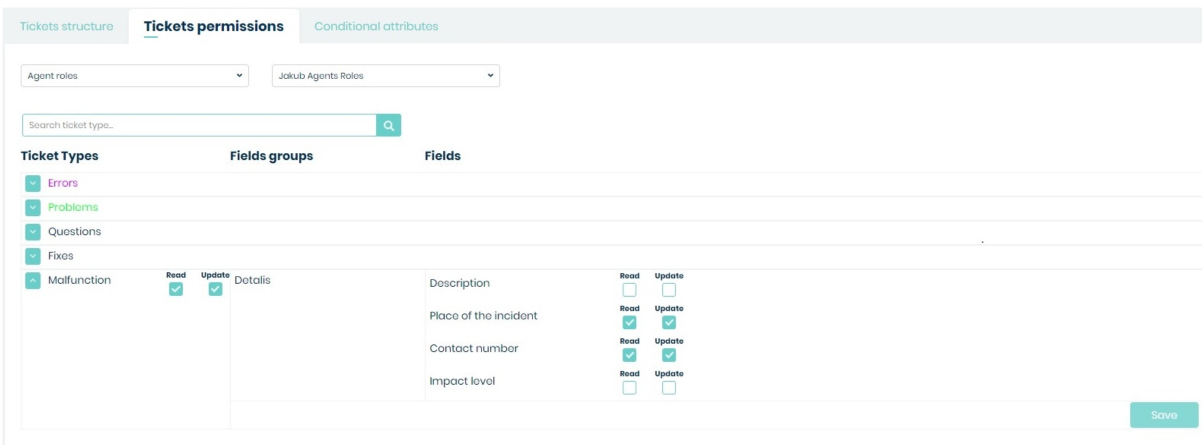
This field is used to determine the relation to the user. After selecting this field as in the case of a regular relation, it is possible to choose between two:

- One to many
- Many to many

Then, in the Pattern field, you select what you want the relation to be for.

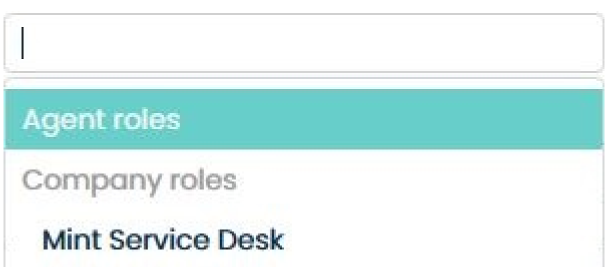
TICKET PERMISSIONS

The second tab is the place where you manage rights for viewing or editing Ticket information. You can do this separately for each Ticket Type you currently have.

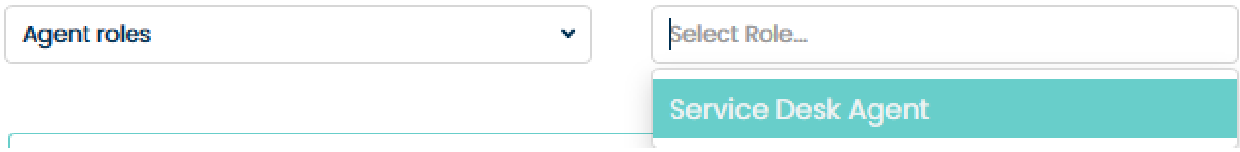


If you want to change rights, first you need to select one position from the list of available General types of roles.

They can be e.g., ‘Agent Roles’ (if you have more than one created in Admin > Agents > Roles section) or ‘Company Roles’ (located in Admin > Companies > Company Manager section.



After you do that, from the second list you need to select a particular type of Role for which you want to change the rights.



The screen below shows the situation when we've decided to select 'Agent roles' and then one particular role: 'Service Desk Agent', which means that we will be able to change the rights for this particular role.

Now we can change the rights by selecting some check-boxes located on the right side of each Ticket type. Please notice that you can also select/remove right for each Attribute as well.

There are two types of rights in the Mint Service Desk:

- **Read** – allows the user only to view the content of the Tickets
- **Update** – allows the user to make changes in the content of a Ticket. For example, Agent will be allowed to answer the client (to create a message in the communication section)

Please notice that when you select the 'Read' it will be selected, but the 'Update' will not be selected.

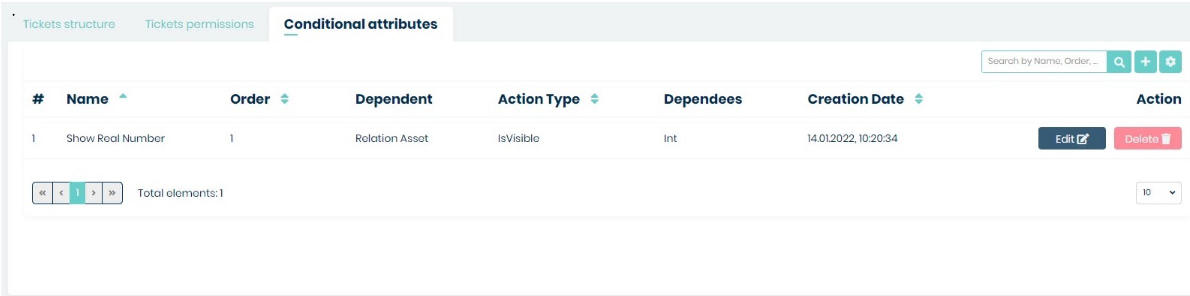
However, when you select 'update' it will also select 'Read'. Update means that you can view and change the content of a Ticket.

Once you finish making the changes, you need to click 

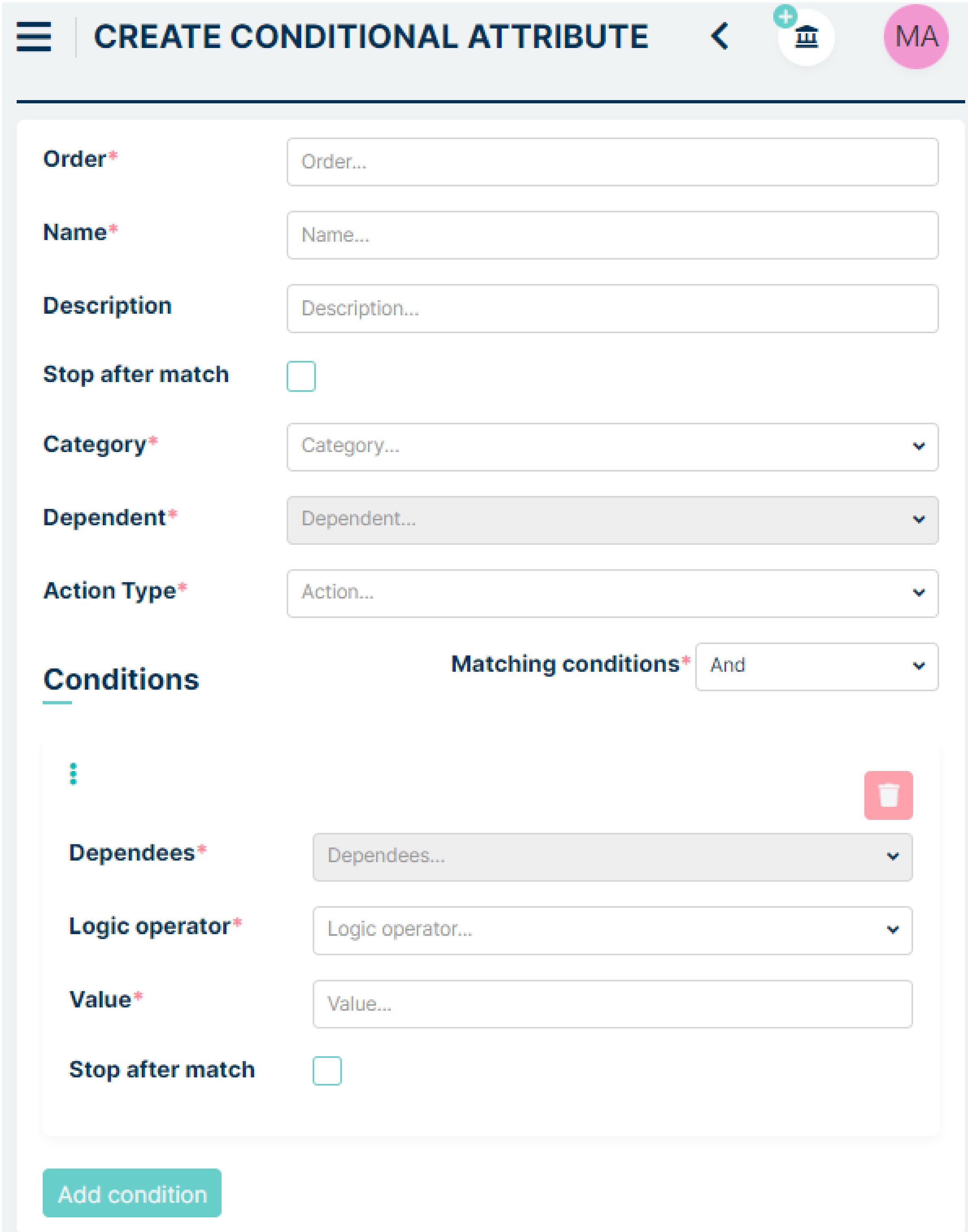
button, otherwise, when you try to leave this part of the system it will inform you that you have some unsaved changes.

CONDITIONAL ATTRIBUTES

In this part of the system, you can configure conditional attributes.



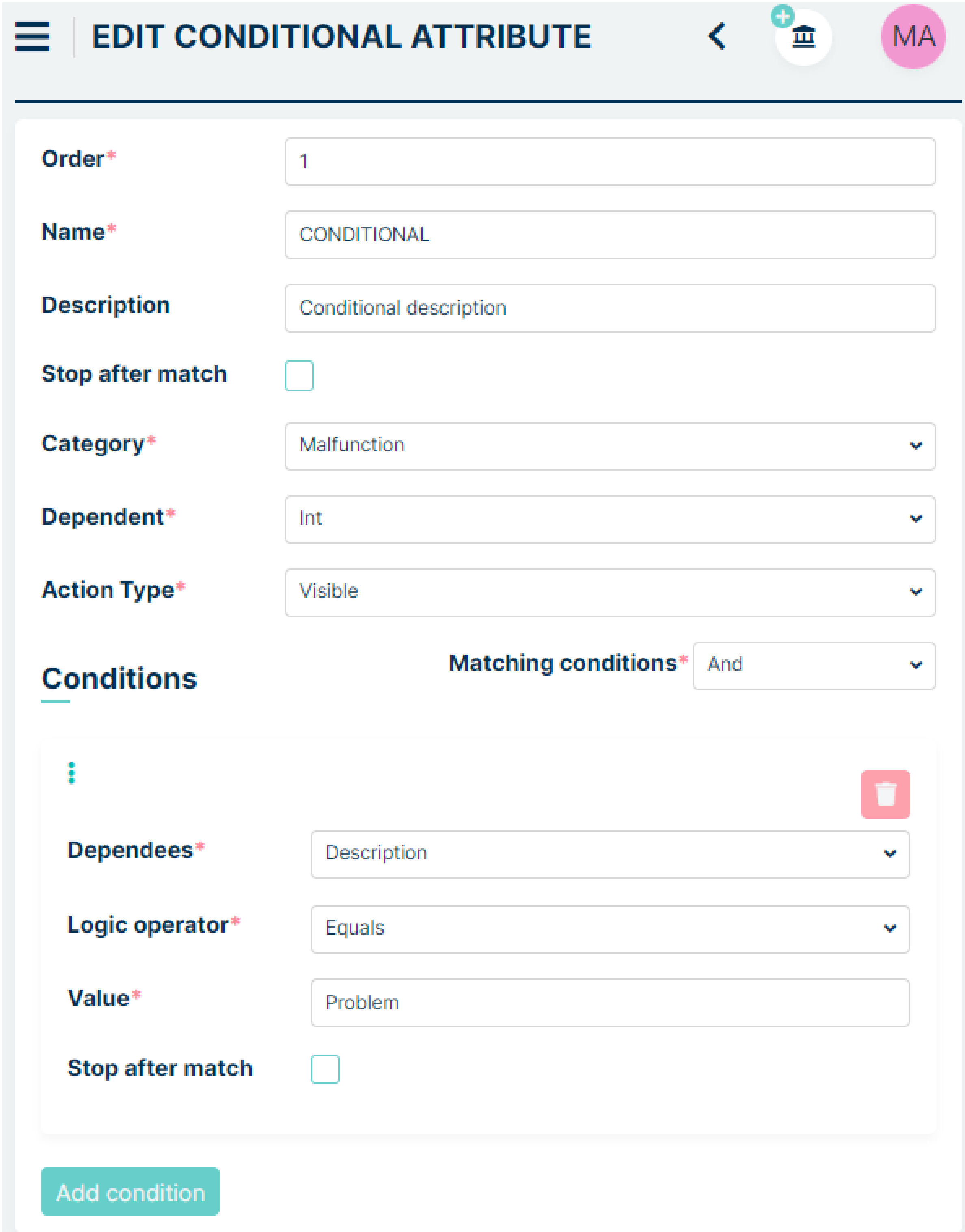
To add a new conditional attribute, you must press  button. When the button is pressed, the user will be taken to the conditional attribute configuration form.



- **Order** - This field specifies the order in which actions should be performed. The conditional attribute with the smaller number will be executed first. This field takes integer values.
- **Name** - This is where the user enters what their configuration should be called.
- **Description** - Here the user can enter a description of the configuration.

- **Stop after match** - When the user checks this box then if the conditional attribute is satisfied then the system will stop there and will not search further.
- **Category** - This is where you select your ticket type.
- **Dependent** - Here you select a dependent field that will appear or disappear depending on the choice made in 'Action Type'
- **Action Type** - This is where you specify what should happen after matching. There are two options to choose from 'Visible' and 'Hidden'. If the user selects 'Visible' then initially the field selected in 'Dependent' will be hidden until the conditions specified below are met. The 'Hidden' option works exactly the opposite.
- **Matching conditions** - At this point you have a choice of two options 'And' and 'Or'. If you choose the 'And' option, all conditions must be met. If you choose the 'Or' option, only one condition needs to be met.
- **Dependees** - In this field, you choose which field to take into account when appearing or hiding the field selected in 'Dependent'.
- **Logic operator** - In this field, you have four options to choose from: 'Equals', 'NotEquals', 'Contains' and 'NotContains'.
  - Selecting the 'Equals' field means that it must equal 'Value'.
  - Selecting the 'NotEquals' field means that it must be different from 'Value'.
  - Selecting the 'Contains' field means it must contain 'Value'.
  - Selecting the 'NotContains' field means it must not contain 'Value'.
- **Value** - Here you enter the value that must be met.
- **Stop after match** - If this box is checked and there is more than one condition the system will not search further once one condition is met.

Example



In this setting, initially the 'Int' field is hidden but will appear if the 'Description' field is equal to 'Problem'.

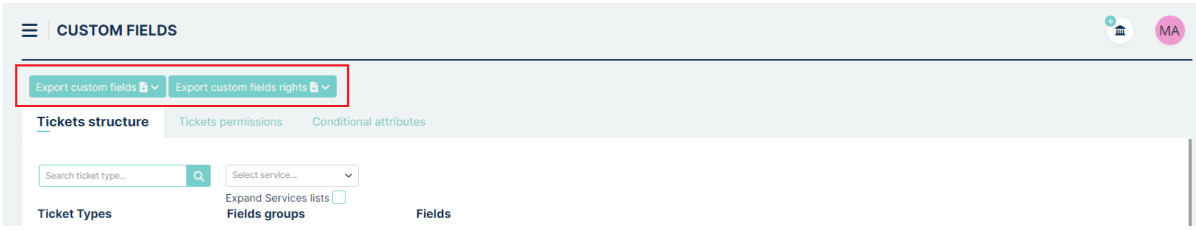
If you want to add another condition, you can press 

button.

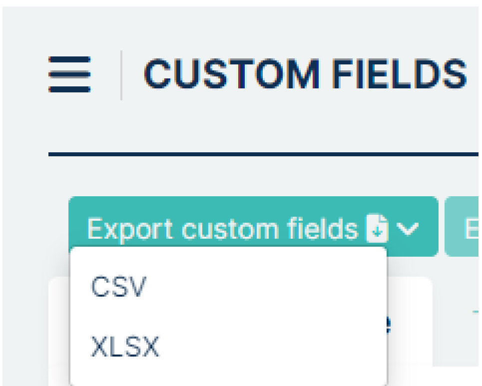
To complete the configuration process, press 

button.

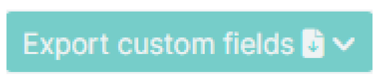
At the top of ‘Custom Fields’ tab you have an option to export settings.



This function allows you to save your settings to a file csv or xlsx file.



It is useful if you want for example to verify, if someone suddenly deleted part of settings (or whole structure) by mistake. Other fuction is to verify, if any major updates of Mint system or your database did not affected to ticket type structure.

You can easily export settings by clicking 

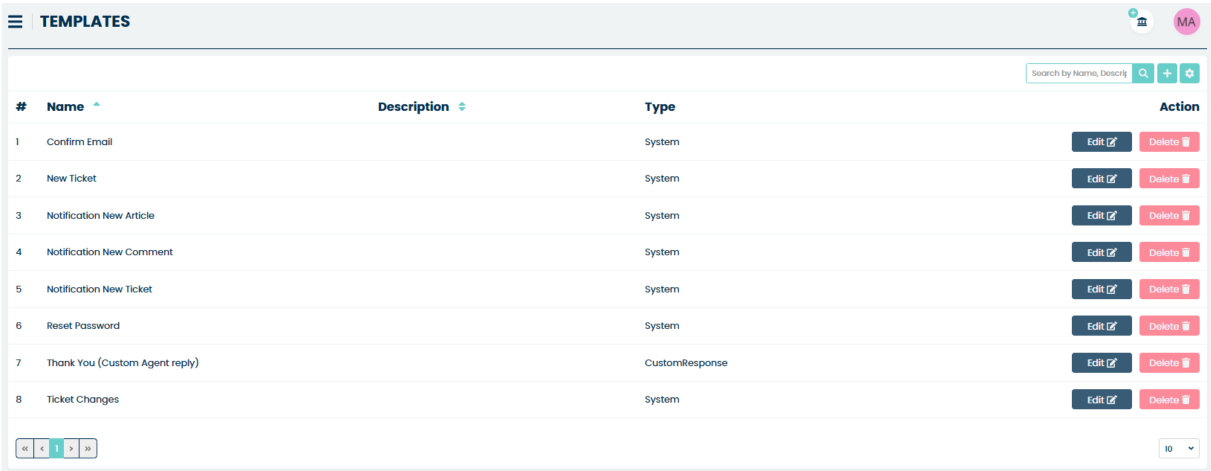
button to export basic structure, or by clicking 

button to export Ticket Type Permissions

5.7.8 TEMPLATES

In this section, you can view, create, edit, or delete all of the Templates available in the system. As mentioned before, a template is built from components (created in ‘Components’ sections).

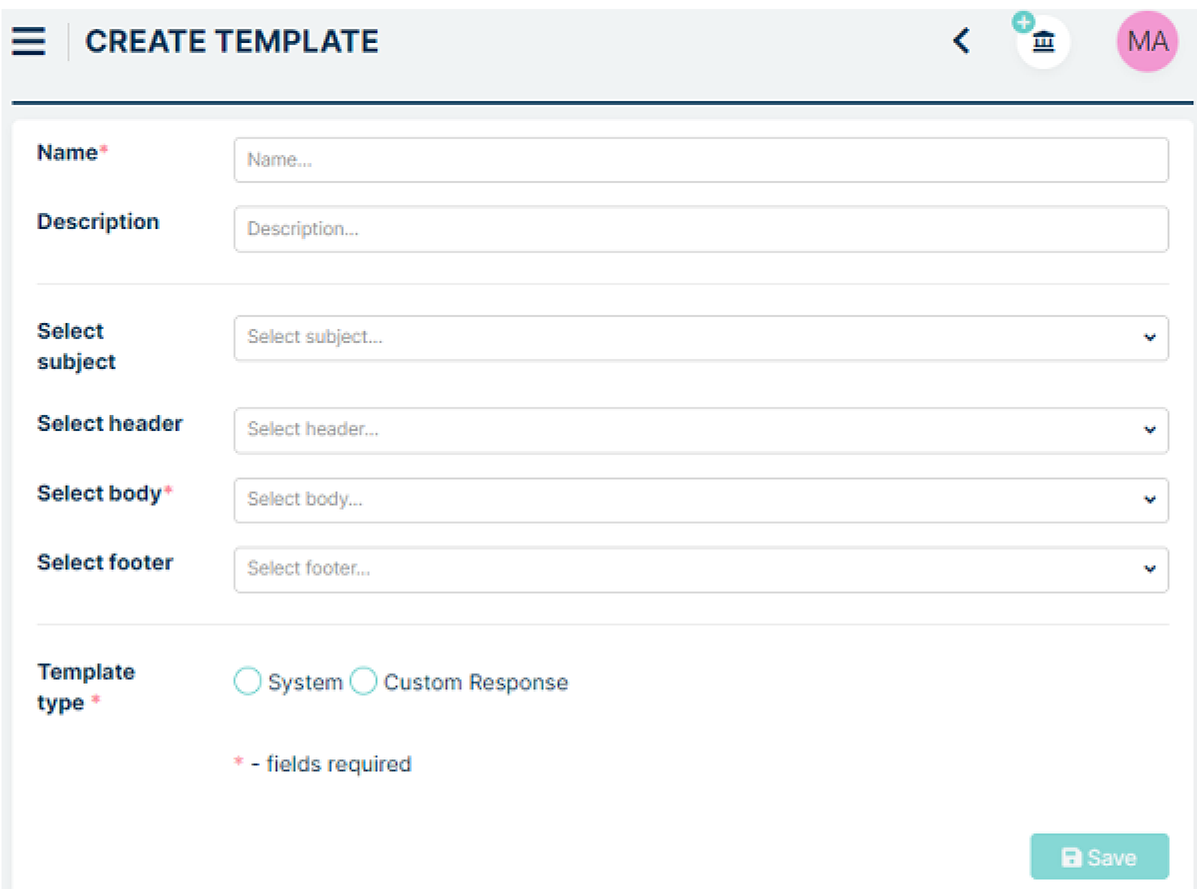
Templates can be used for many cases: emails (e.g., confirmation of new account), auto-responses (e.g. inside Ticket communication section), or even predefined messages which can be used by an Agent to speed up his work.



You can add as many templates as you like, along with all of your common answers and replies that you always use with your customers, etc.

Mint Service Desk has some already pre-defined templates for you to choose from.

If you want to create a new one, just click on the  button and you will be moved to the "Create template' form. Always remember that before moving to create a new template you need to create the needed components (in 'Components' section).



In the "Create Template" view you need to fill the "Name" (required) and add some "Description" if you like.

Once you do that you need to select components from which your Template will be built. You can select four components: 'Subject', 'Header', 'Body', and 'Footer'. 'Body' is required, the others are optional.

Sometimes you should use more than just the 'Body' component while building your Template. For example, when you're creating an email template (e.g., for Email confirmation message) you should use the 'Subject' component in addition to 'Body'. 'Header' and 'Footer' would also be great.

After selecting the components, you need to choose one of two available 'Template types'. Those are 'System' and 'Custom Response'.

Select "System" for templates which the system will send automatically based on some activity.

If, on the other hand, you want to have a predefined template that your agents will use to manually answer your customers choose the "Custom Response" type.

Once you finish save your changes by clicking 

button.

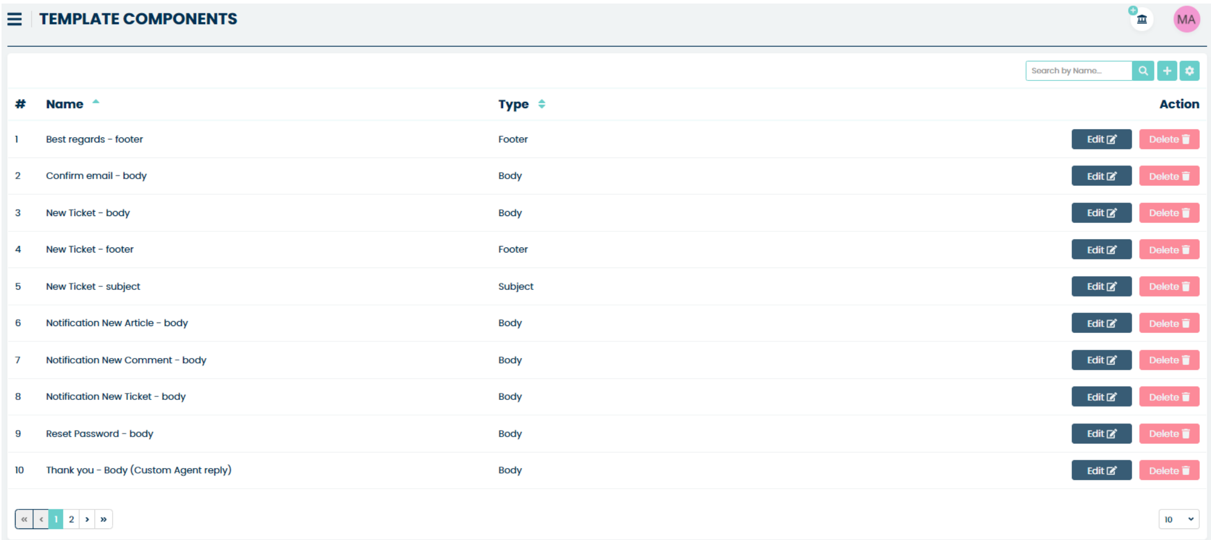
After creating a new template, you can always either change anything in it (

button) or even delete it from the system (

button). Deleting the template does not delete any components which were used in that template.

5.7.9 COMPONENTS

In this section, you can create template components from which you will later build whole templates e.g., 'Thank you' message sent by the system right after creating a Ticket.

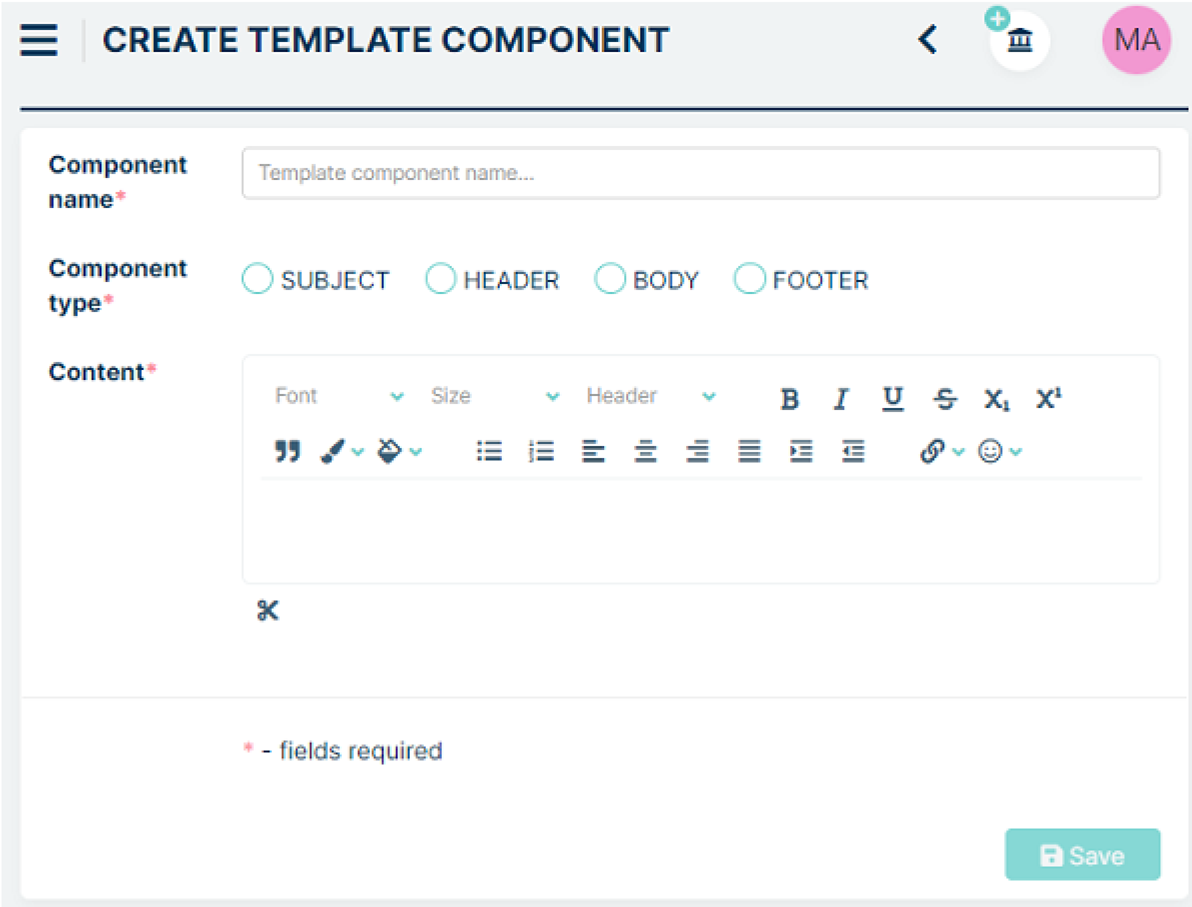


Each template is built from a couple of types of components. In this section, you can predefine those components that you will later use in the next section.

MINT Service Desk has four types of components: "Subject", "Header", "Body" and "Footer".

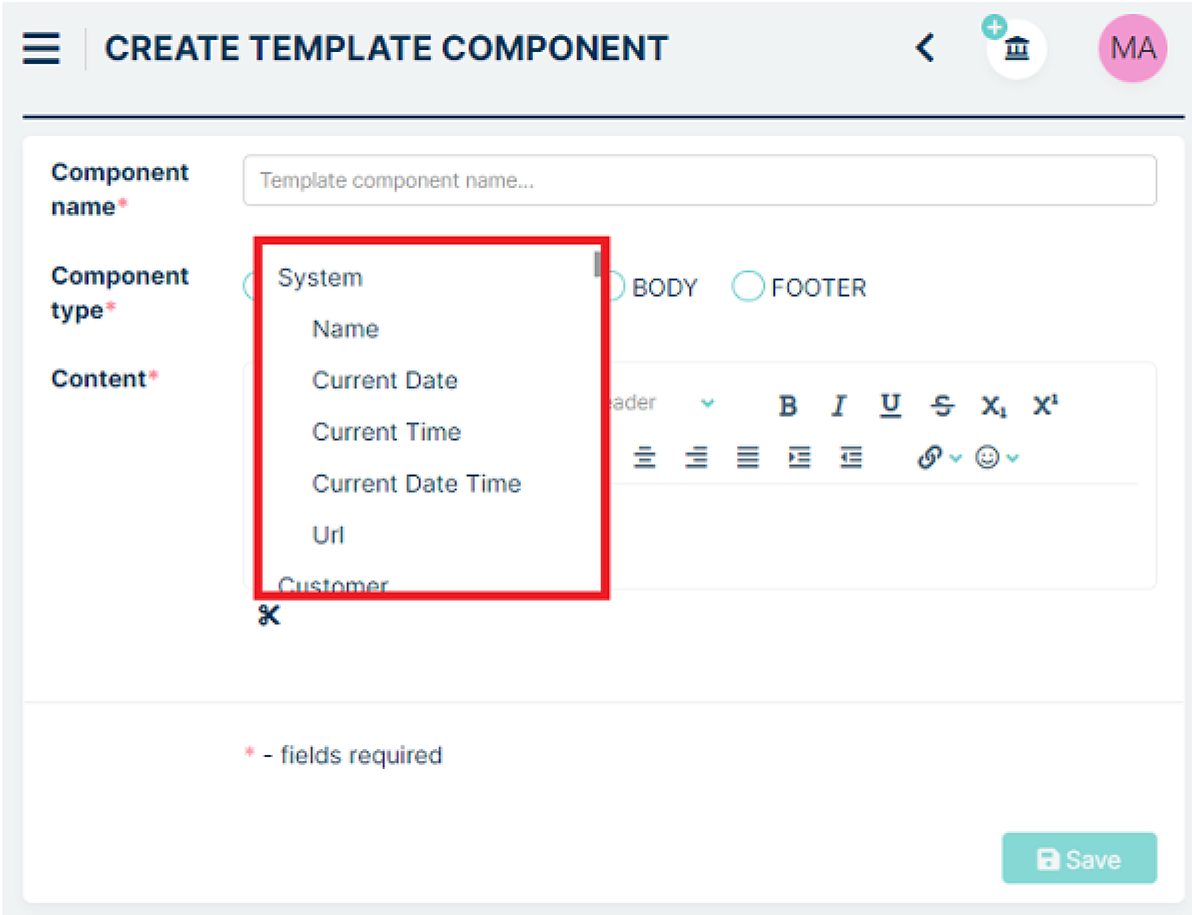
To create a new component, you need to click on the "Add new value" button.

Now, in the 'Create template component' view you need to name your new component ('Component name') and choose a type ("Subject", "Header", "Body" or "Footer").



In the 'Content' section you can build the content of your component. You can use the Rich Text editor to give the desired format to your content. Also, you can add additional dynamic fields, which will automatically be filled with data from the system the moment the template (with this particular template component) will be used.

To do so, click the scissor button located right below the 'Content' section and from the dropdown menu select and add the dynamic fields you need.



Once you finish just click the 

button.

Remember that after creating a new component you can always either change anything inside it (

button) or even delete it from the system (

button).

By creating a set of components and later templates you can automate a lot of your work. That's why you should always remember to use the right names to easily manage and handle many components.

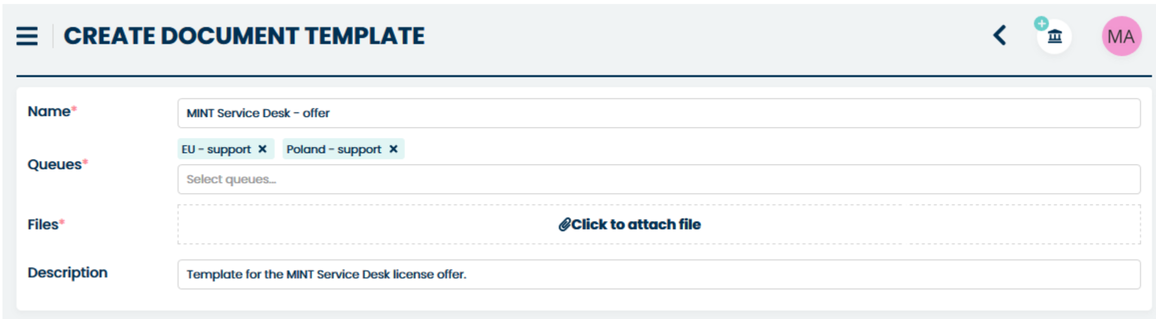
5.7.10 DOCUMENT TEMPLATES

In this place, you can add Document templates in the form of external files to the MINT Service Desk system. Later, as an Agent user, you will be able to add those templates in the 'Ticket Details' view.

The default view shows the list of already uploaded Document templates.

To add a new Document template simply click the button.

Now, in the 'Create document template' put some name ('Name') for your template then select the Queues. Depending on your choice your template will be available to use only for tickets created in or moved to those Queues. If you want, you can also add some description ('Description').



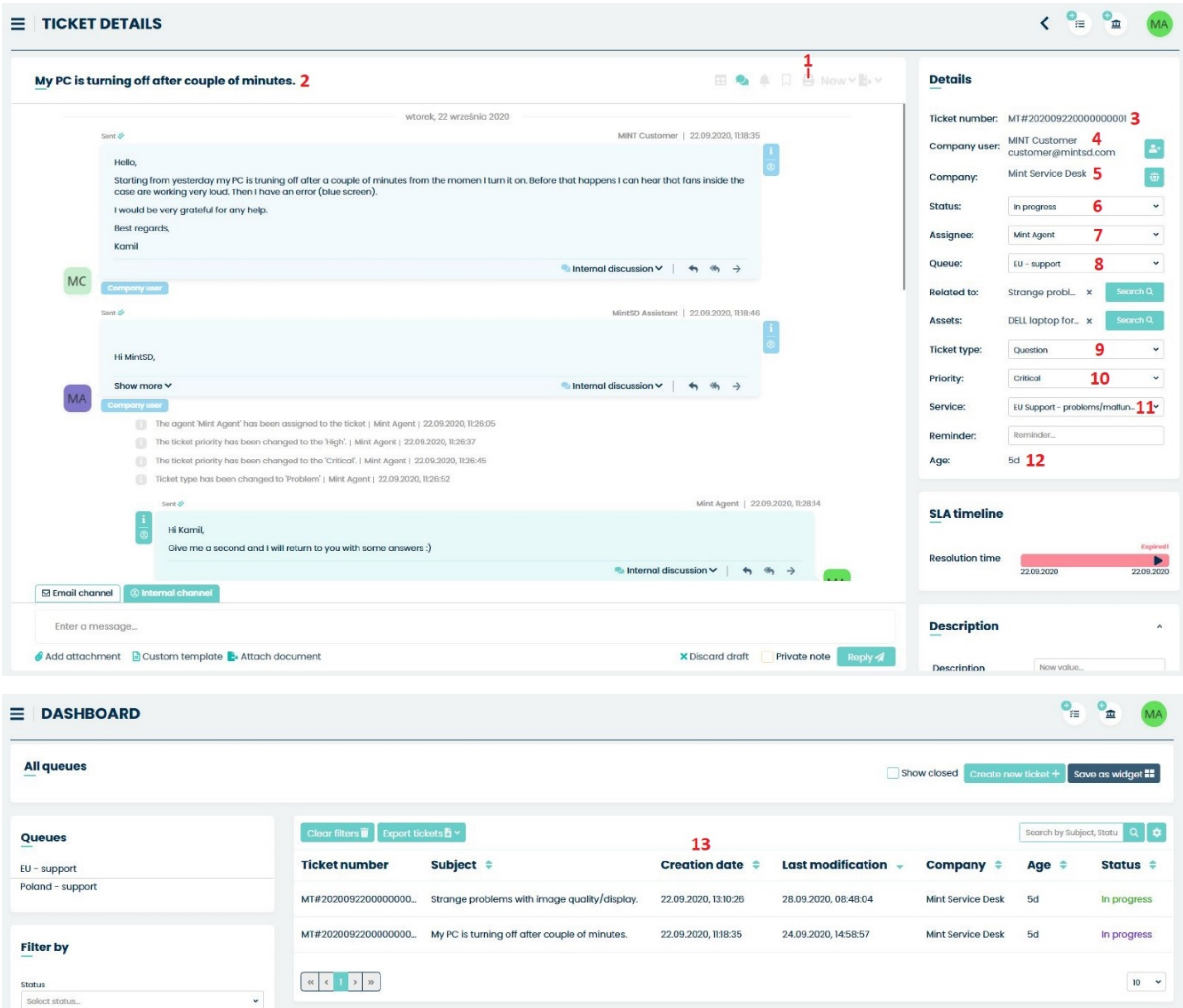
Now you need to add an external file which contains the prepared Document template. MINT Service Desk only supports one file format: **.docx**.

To create such a Document template, you need to use external software e.g., Microsoft Word or any other which can save the file in .docx format.

While creating a template you can (and you should) use special placeholders. For example, if you use "{{Company}}" later in the system, when an Agent use such template the "{{Company}}" will be replaced with the Client's Company Name.

For the purpose of creating a Document template, you can add the fields below.

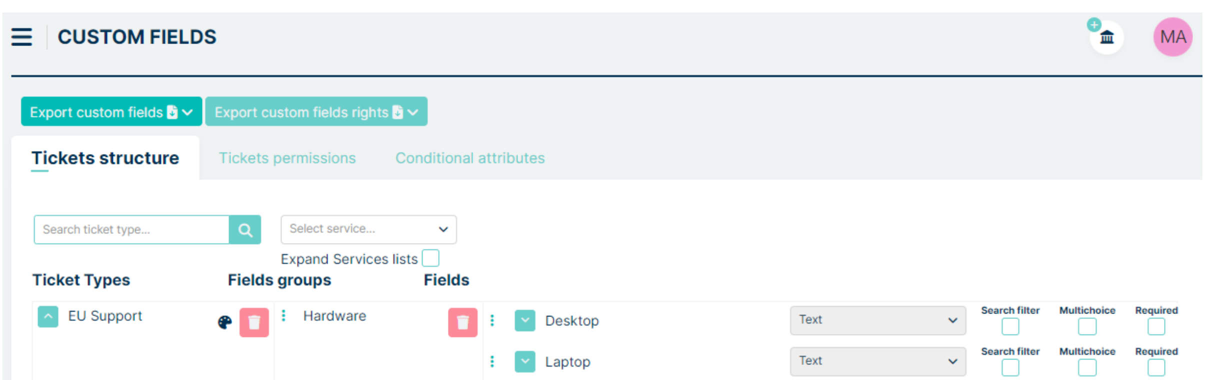
No	Placeholder	Location/used in	Description
1	{{PrintDate}}	Ticket Details	Date of creating a ticket .pdf preview.
2	{{TicketName}}	Ticket Details > Details	Ticket name/title.
3	{{TicketNumber}}	Ticket Details > Details	Ticket number.
4	{{Customer}}	Ticket Details > Details	Ticket owner's name – a person who created the ticket.
5	{{Company}}	Ticket Details > Details	Company name of the ticket owner.
6	{{Status}}	Ticket Details > Details	Ticket current status.
7	{{Assignee}}	Ticket Details > Details	A person (Agent) assigned to the ticket.
8	{{Queue}}	Ticket Details > Details	Ticket Queue name.
9	{{TicketType}}	Ticket Details > Details	Ticket type name.
10	{{Priority}}	Ticket Details > Details	Ticket priority.
11	{{Service}}	Ticket Details > Details	Name of the chosen Service for the ticket.
12	{{Age}}	Ticket Details > Details	Ticket age (in hours or days).
13	{{TicketCreationDate}}	Agent/Client Dashboard	The exact date when the ticket was created.



You can also use Custom Field template snippet from Tickets and Users section. Schema for creating this snippet looks like below:

{{GroupName:AttributeName}}

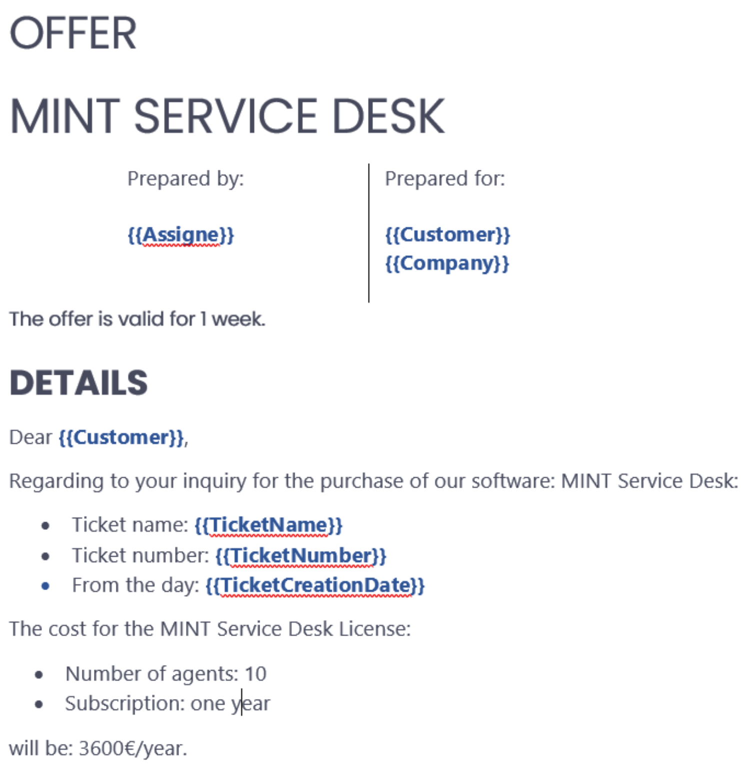
Example:



To create snippet for "Desktop" and "Laptop" attribute, You need to write it like that: {{Hardware:Desktop}}, {{Hardware:Laptop}}.

Remember that if You have the same group name and atrribute name in Users and Tickets, MINT will use value from Tickets Custom Field in snippet.

Below you can see how a prepared template document should look like.


OFFER

MINT SERVICE DESK

Prepared by:

{{Assigne}}

Prepared for:

{{Customer}}
{{Company}}

The offer is valid for 1 week.

DETAILS

Dear {{Customer}},

Regarding to your inquiry for the purchase of our software: MINT Service Desk:

- Ticket name: {{TicketName}}
- Ticket number: {{TicketNumber}}
- From the day: {{TicketCreationDate}}

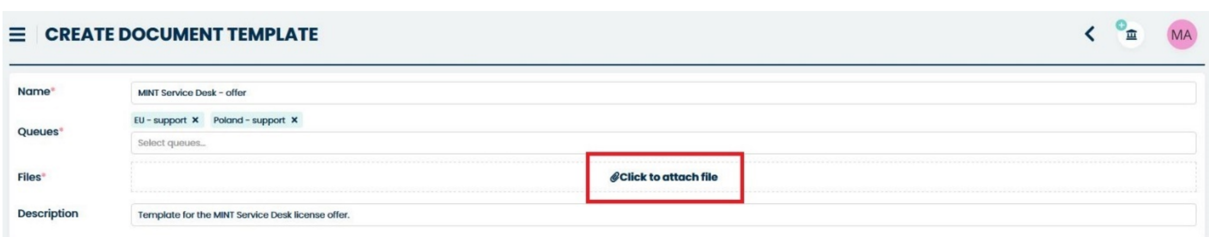
The cost for the MINT Service Desk License:

- Number of agents: 10
- Subscription: one year

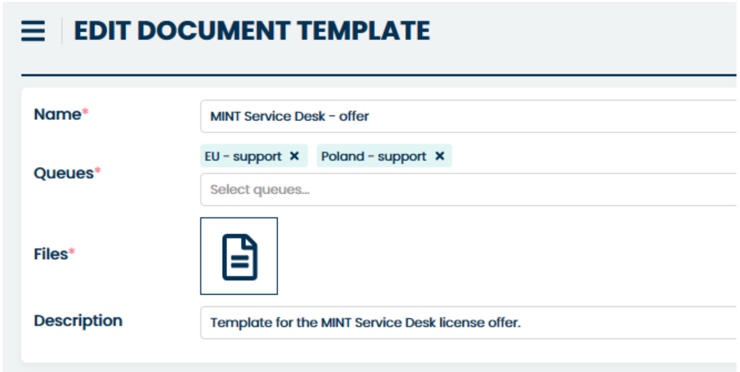
will be: 3600€/year.

Placeholders are written in blue.

Now, when you have such a Document template ready you can upload it to the MINT Service Desk. In the 'Files' part click on the 'Click to attach file' field.

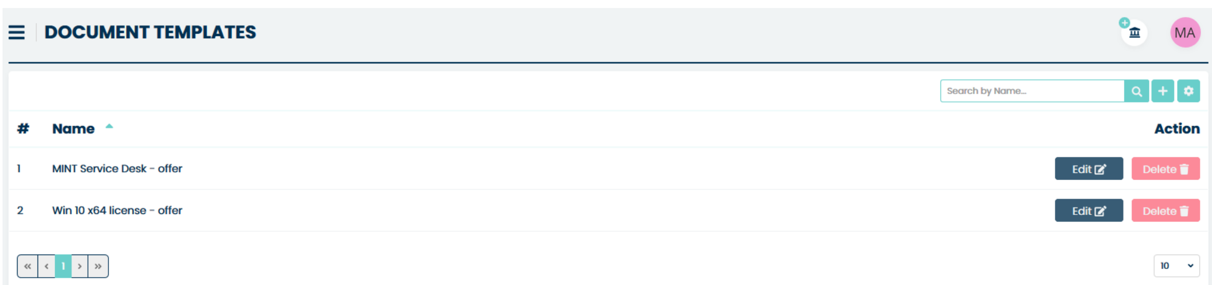


In your system's file explorer find, select and add your custom-made Document template. Once you do that you will see a file miniature in the 'Files' part.



If you want to delete the file and add a new one you can do that by clicking the X button located at the top right corner of the file's miniature the moment you move your mouse cursor over it.

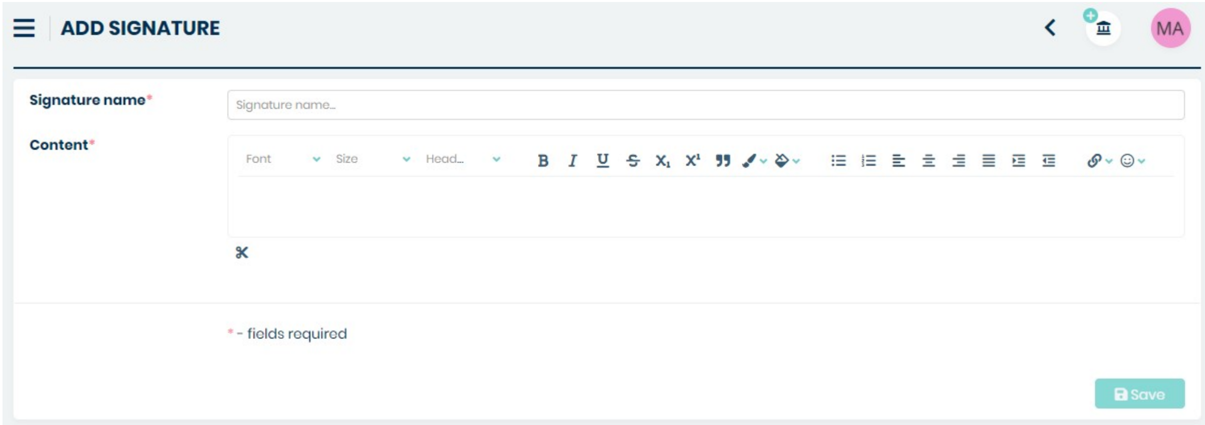
Once you decide that everything is in order click  button. After that, you will notice a new position on the list of available Document templates.



Now Agent can use it while communicating with a Client, inside the 'Ticket details' view. It was already described in the Agent > Ticket Details part of this guide.

5.7.11 SIGNATURES

This is where all the signatures created are located. To create a new signature, press the  button. The user will be taken to the signature creation form.



Two fields must be completed at this point:

- **Signature name** - In this space, enter what you want the signature to be called.
- **Content** - Enter the content of the signature in this space.

Remember that you can enhance your captions with custom fields, bold, underline, etc.

After completing the fields, press the 

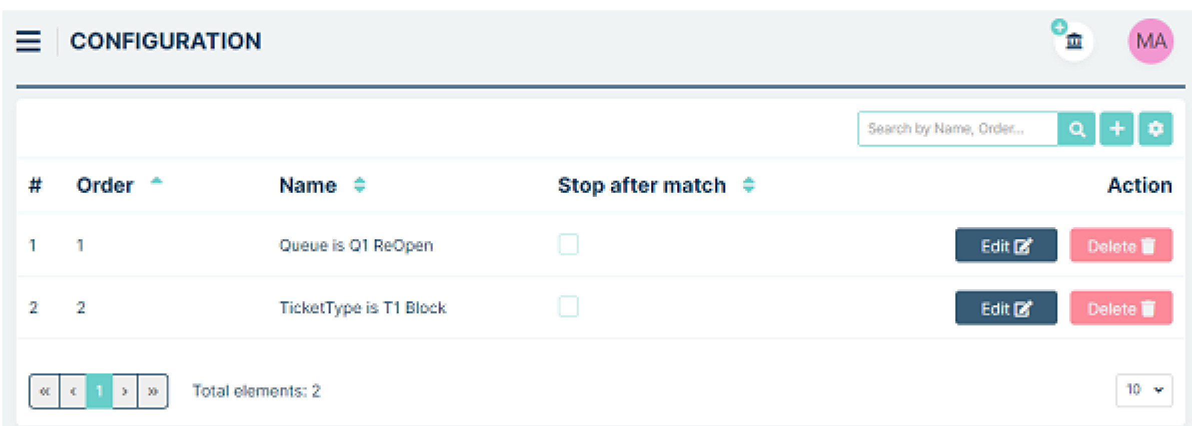
button.

5.7.12 CONFIGURATION

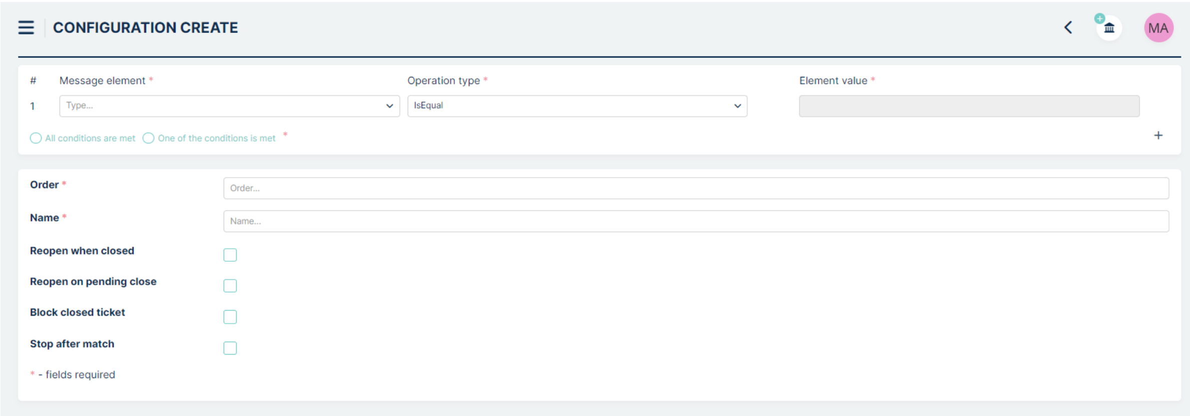
Here you can configure what setting the queue or ticket type should have.

For example, if you want a ticket with a specific queue to reopen after receiving a new article when there is a ticket closed, you can do it here.

After entering this tab, a list of all available configurations will be displayed.



To start the process of creating a new configuration, press the  button.



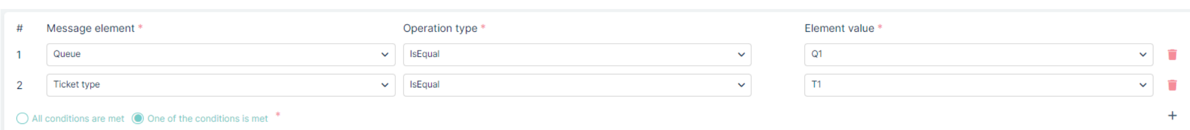
The configuration is divided into two segments. In the first segment, complete these fields:

- **Message element** - Here you choose whether you want the configuration to apply to the Queue or Ticket Type.
- **Operation type** - Here you select the type of operation.
- **Element value** - Here you choose which value you want the configuration to apply to. The list depends on the selection in the **Email element**.

Below this configuration, there are two options to choose from:

- **All conditions are met** - This option means that the configuration will work when **ALL** conditions are met.
- **One of the conditions is met** - This option means that the configuration will work when **AT LEAST** one condition is met.

There is a + button in the lower right corner of this segment. Pressing it allows you to create another configuration condition.

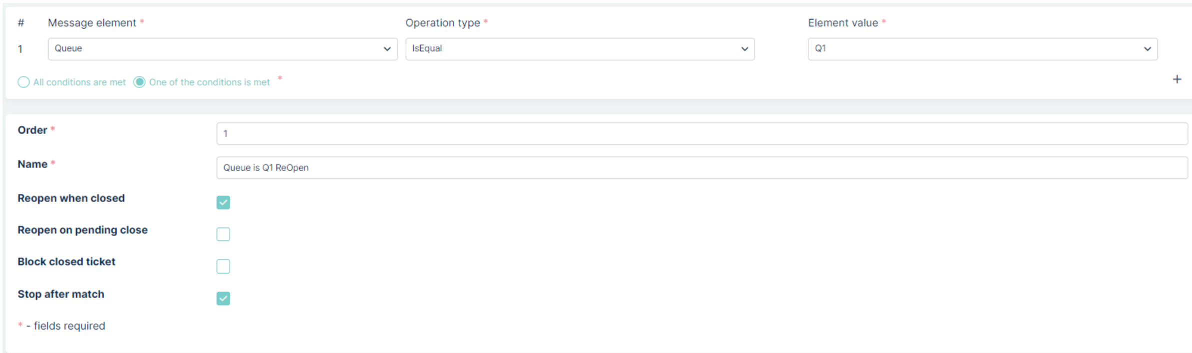


This setting means that the configuration will work when the queue is "Q1" OR Ticket Type is "T1".

The second section includes such fields:

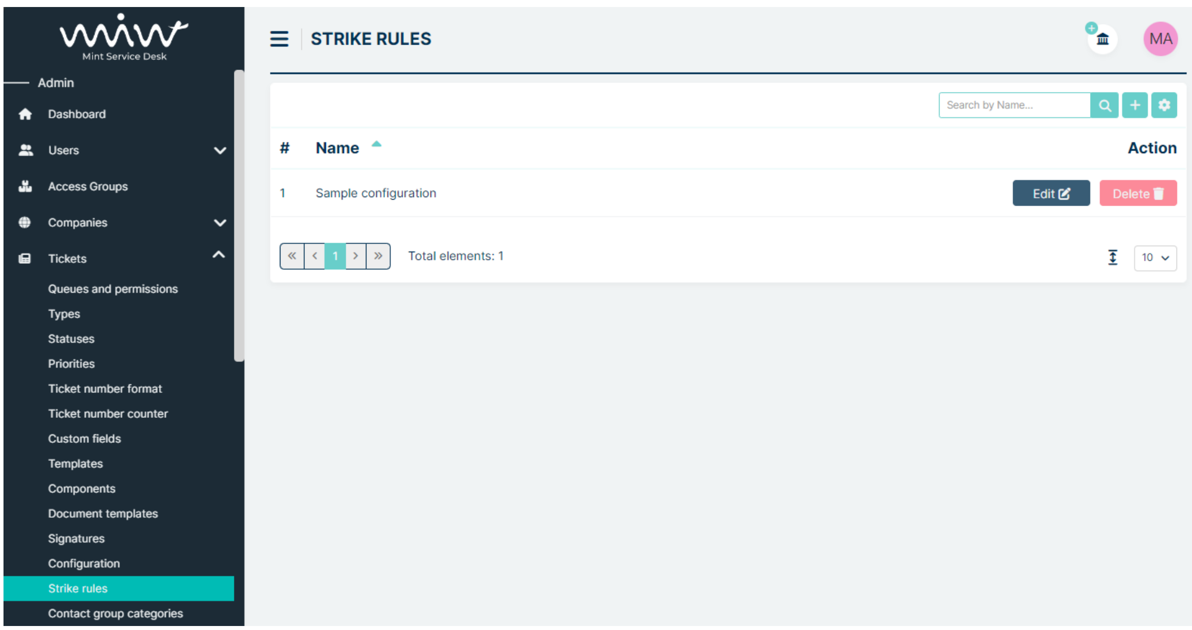
- **Order** - Here you enter a number. This value indicates in what order the configurations will be executed. The configuration with the smaller number will execute first.
- **Name** - Here you enter the name that the configuration should carry.
- **Reopen when closed** - Checking this option will cause that when the ticket is closed and a new article falls in then the ticket will change its status to ReOpened.
- **Reopen on pending close** - Checking this option will cause that when the ticket is on Pending Autoclose and a new article drops in, the ticket will be reopened. When the time is up and the ticket is closed then the ticket will not reopen.
- **Block closed ticket** - Checking this option will block the closing of the ticket.
- **Stop after match** - If this box is checked and there is more than one condition the system will not search further once one condition is met.

This is what a simple configuration looks like:



5.7.13 STRIKE RULES

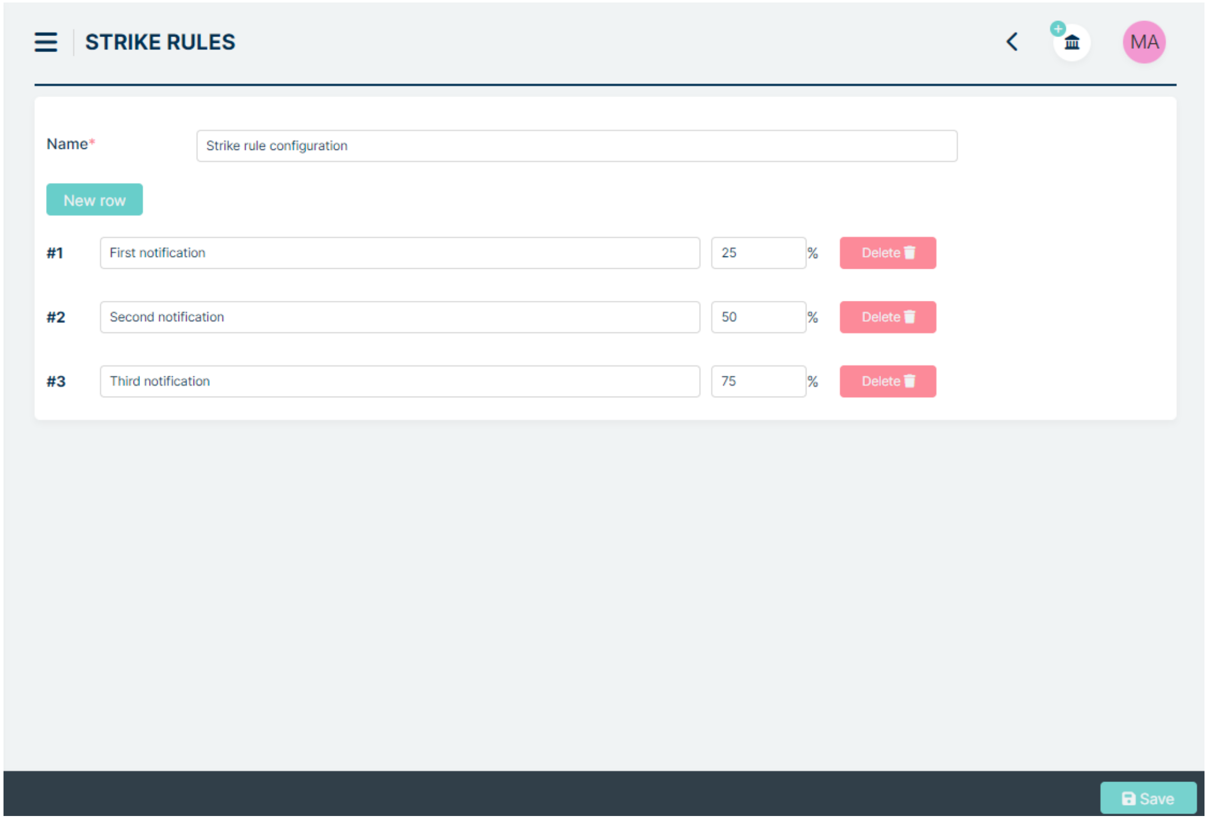
In this part of the system, the administrator can configure notification rules for Pending Autoclose statuses. In the mentioned status, there is an option to configure notifications that will appear as the Pending Autoclose time elapses. The duration of the status is set in the **Tickets** → **Statuses** section.



To add a new configuration, click the  button. Then, in the Name field, enter the configuration name and click New Row.

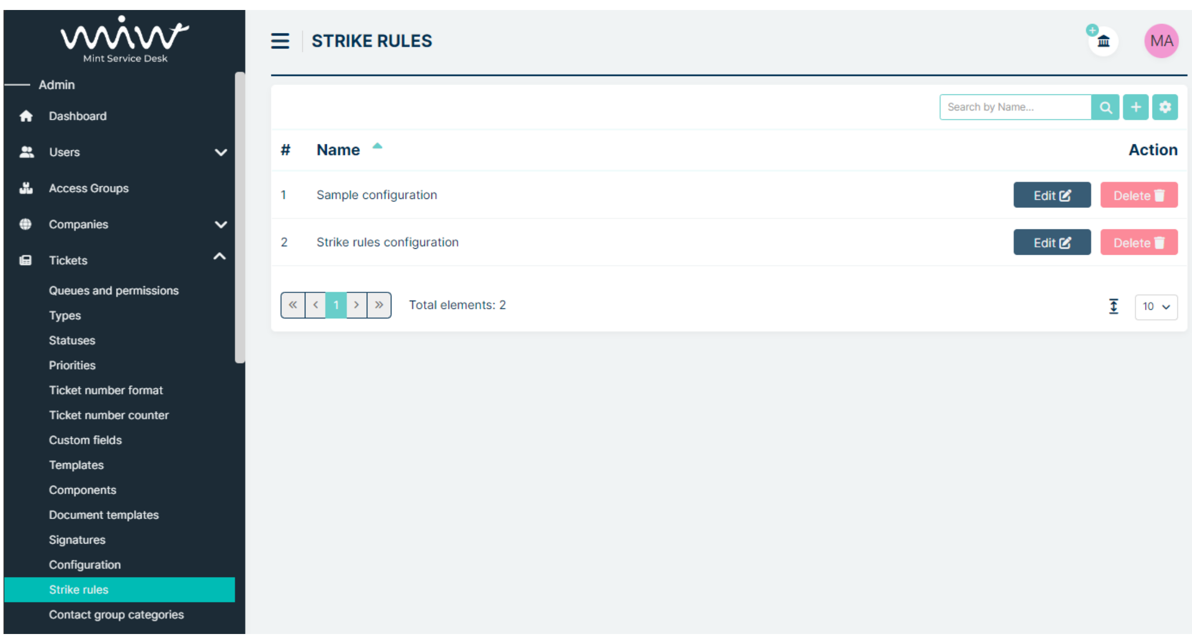
A row will appear where you fill in the name of the item and the percentage of time after which the notification should trigger. If you need additional notifications as the Pending Autoclose status time elapses, press the New Row button again, and another row will appear for completion. You can always modify the saved configuration or even delete unnecessary rows with 

button.



When you fill all fields press the 

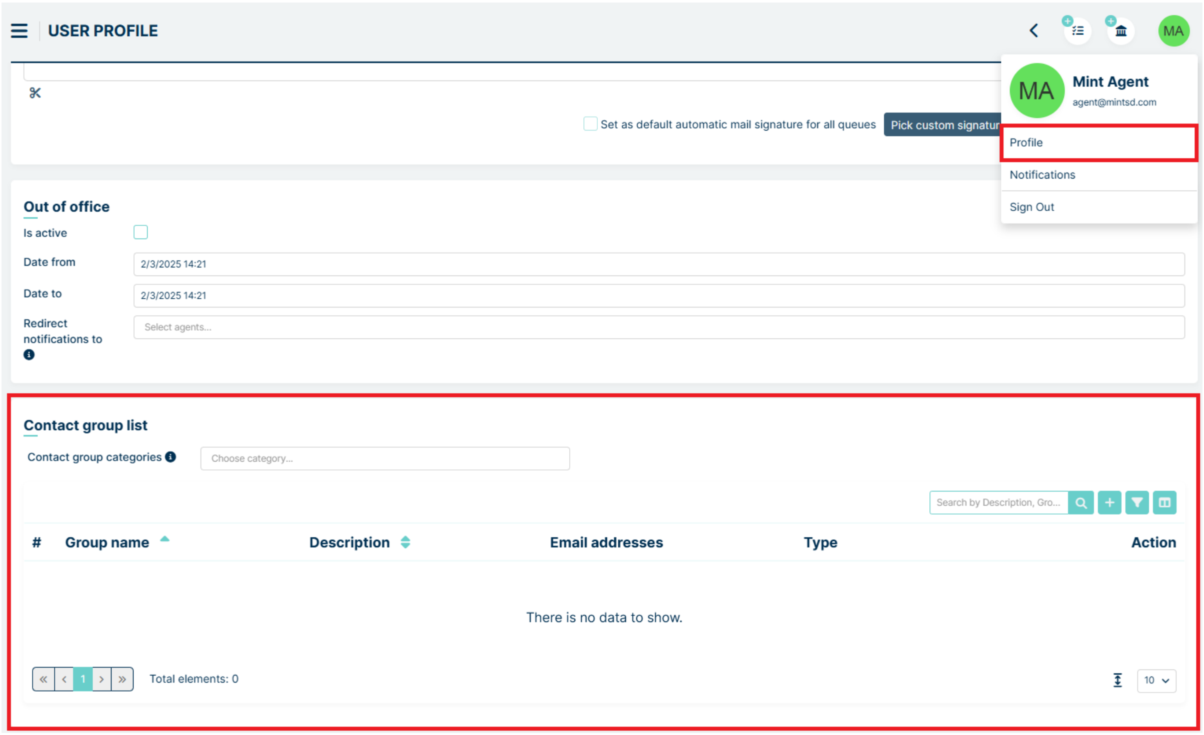
buton. New configuration will be added to Strike rules list.



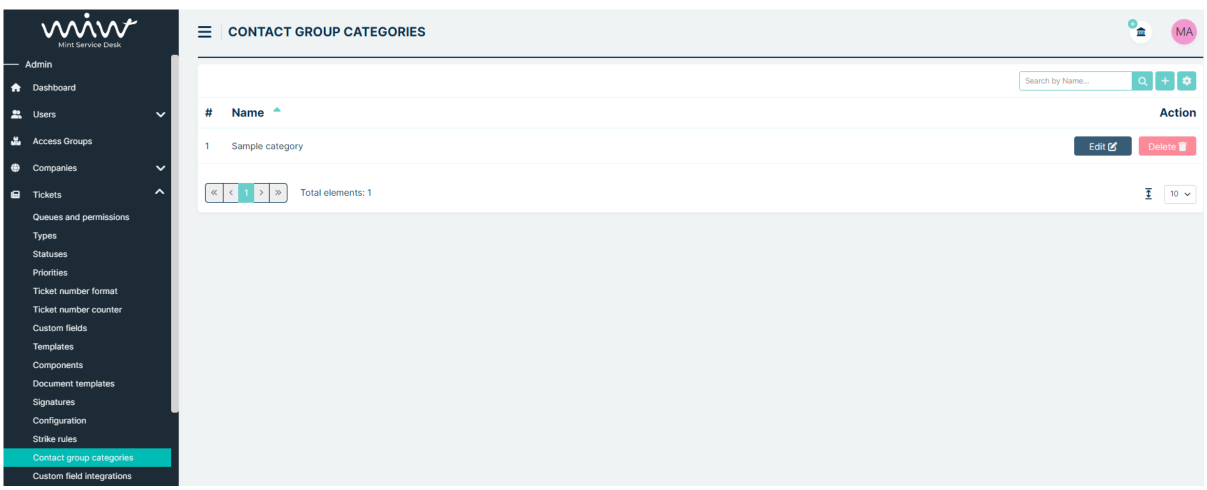
Assigning the configuration to the Pending Autoclose status is described in the **Tickets** → **Statuses** section *(click here to visit)*, while the notification configuration is described in **Notifications** section *(click here to visit)*.

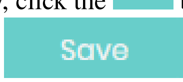
5.7.14 CONTACT GROUP CATEGORIES

At this point, the Admin can configure the categories of contact groups that will be available in the Contact Groups section of Agents' profiles:

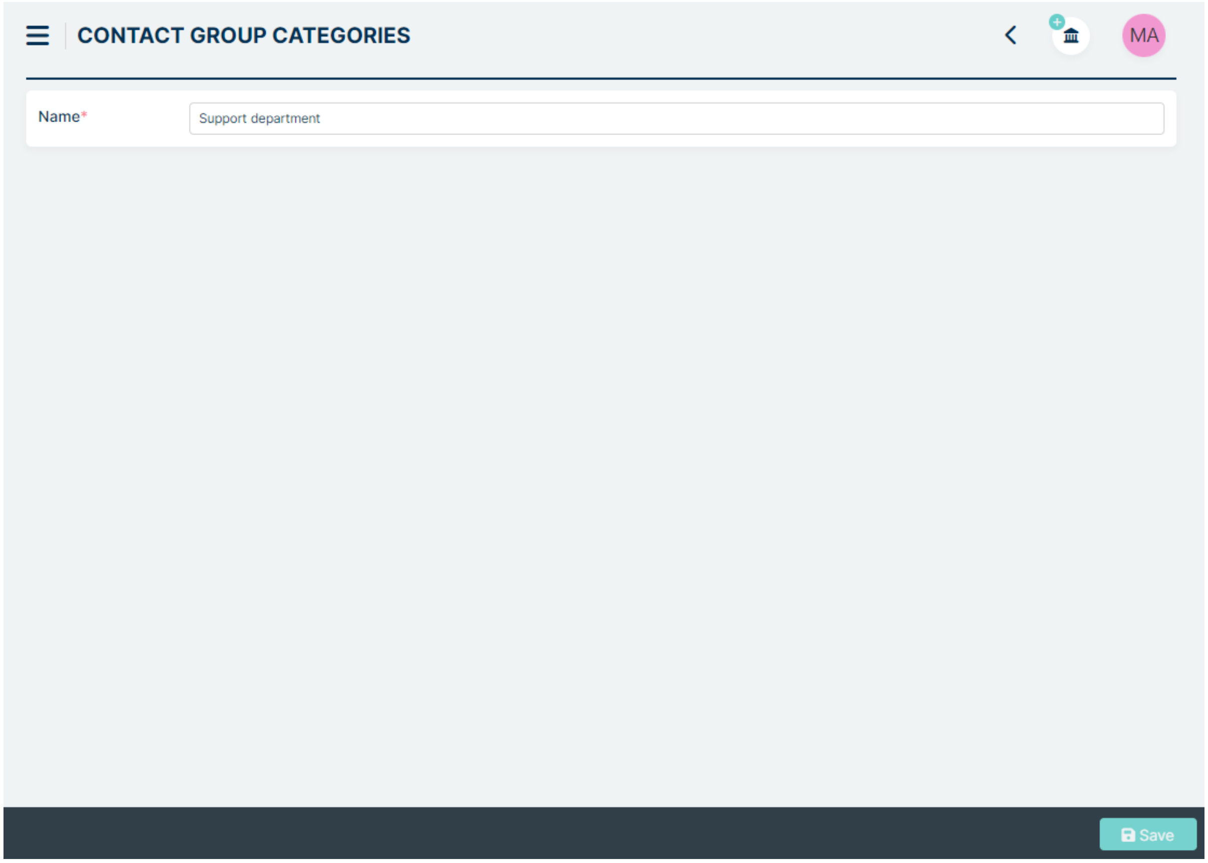


When you enter the tab 'Contact group categories', the main configuration page appears.

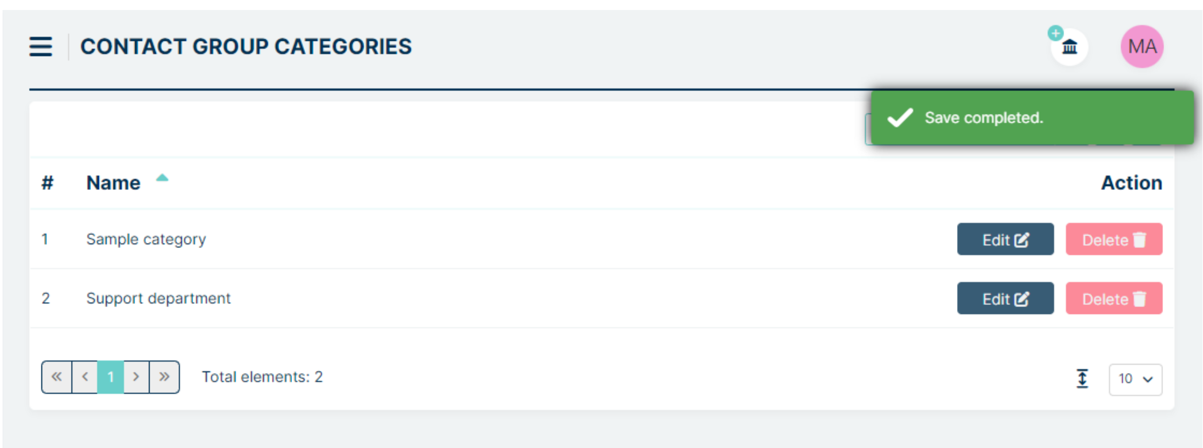


To add a new category, click the  button in the upper right corner of the screen. Then enter the name of the new category and click the 

button in the lower right corner.



After saving, the new category will appear on the list.



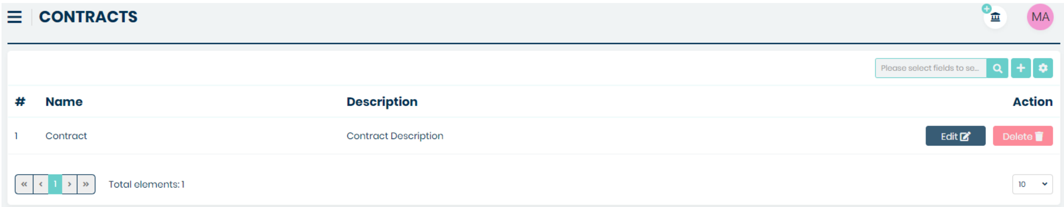
From that moment on, Agents can select the newly added category in the Contact Group section of their profile (*CLICK HERE* to proceed to **Contact Group** section in Agent profile).

5.8 SERVICES

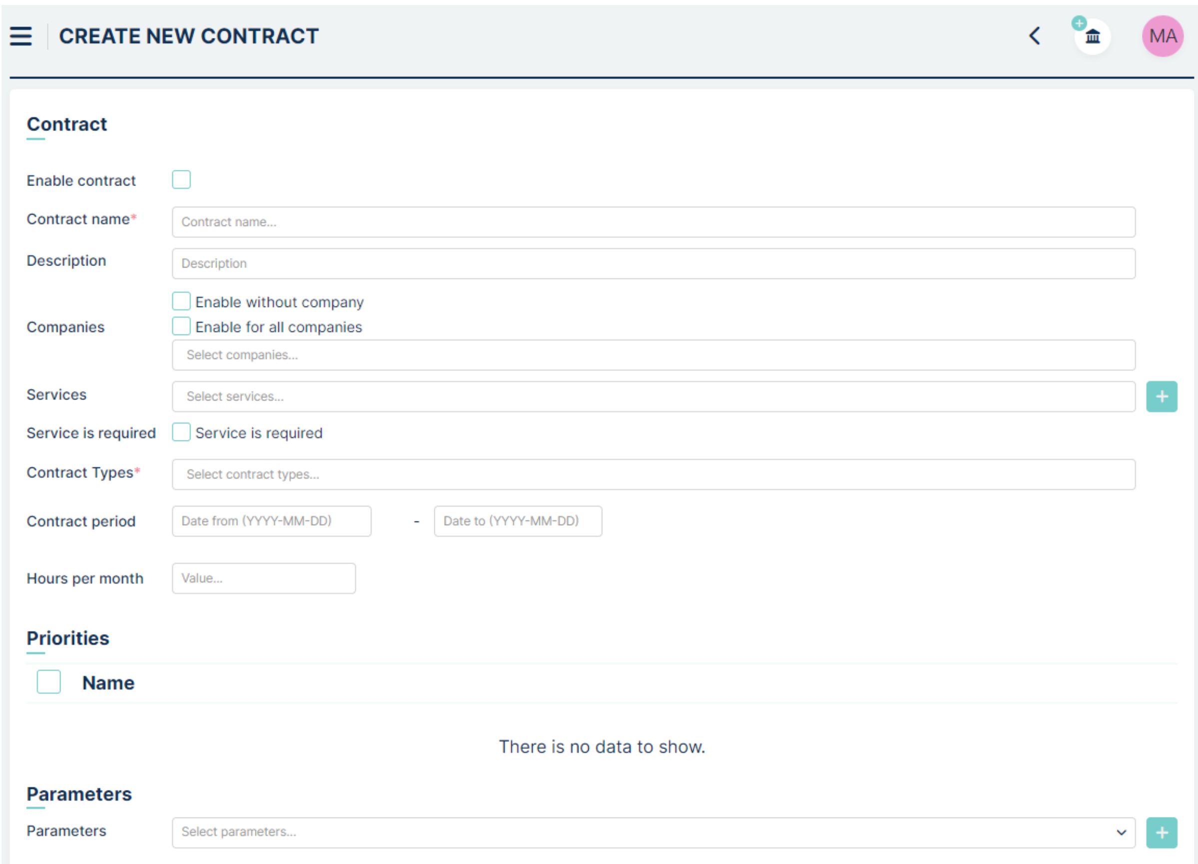
The next section of the Admin Portal is "Services" where you can create and manage your Contracts, Contracts Types, Services, Calendars, SLA parameters.

5.8.1 CONTRACTS

In this part of a system, you can add and manage all of Contracts, including parameters, calendars, and priorities.



In order to start adding a new Contract, you need to click on the  button, located on the right side, next to the search field. You will see that a new section has been opened.

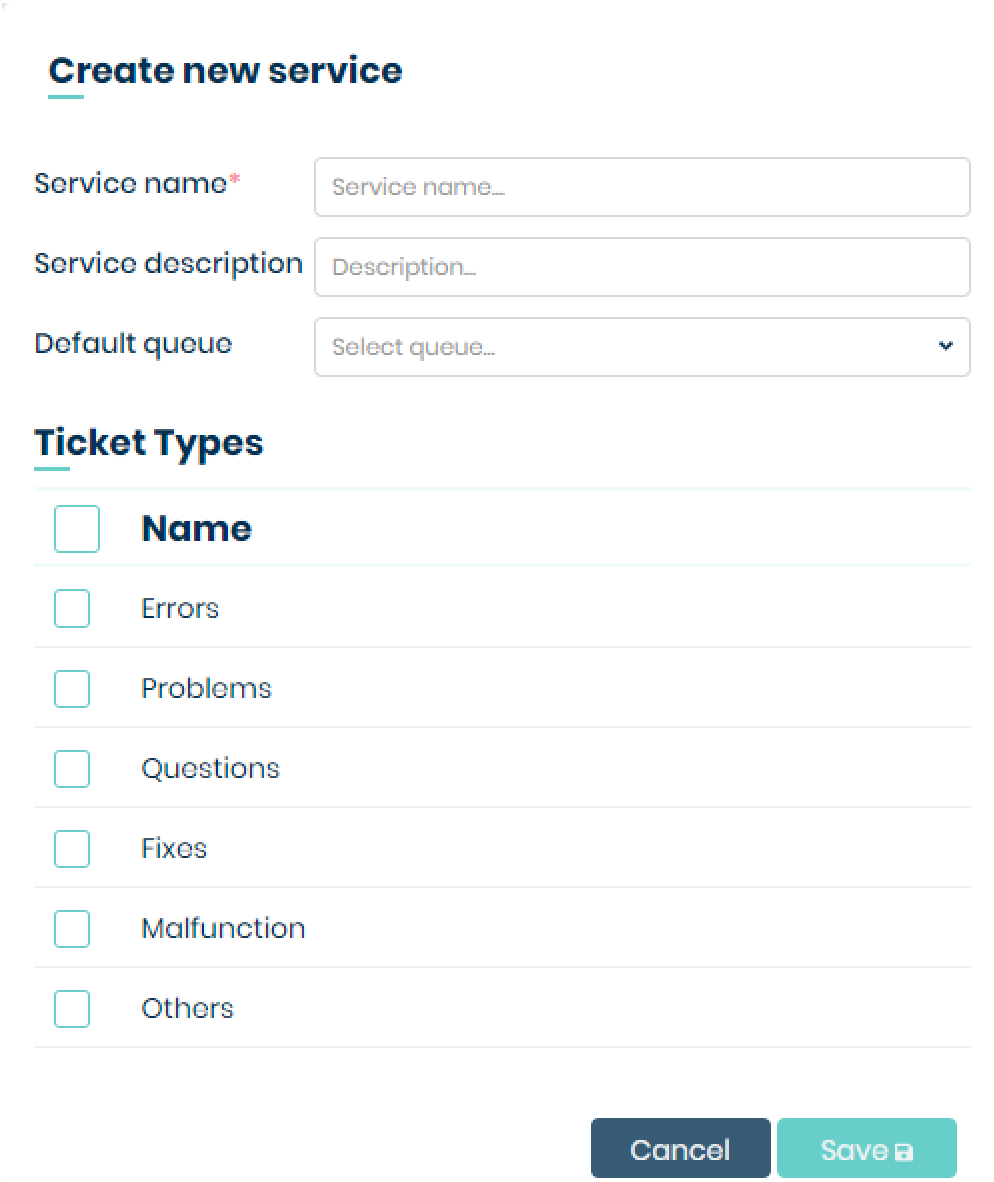


At first you can choose "Enable contact" to set it as acvite contract and making the possibility to assign it to the specific ticket. Now you need to type a name for your Contract ('Contract name'). You can now complete the description, select the company (Mint Service Desk has one company pre-defined) and service. Then you must select at least one Contract types.

Checking the 'Enable without company' checkbox will allow you to activate the contract without specifying a company.

Checking the 'Enable for all company' checkbox will make the company selection box disappear because the contract will be available for all companies.

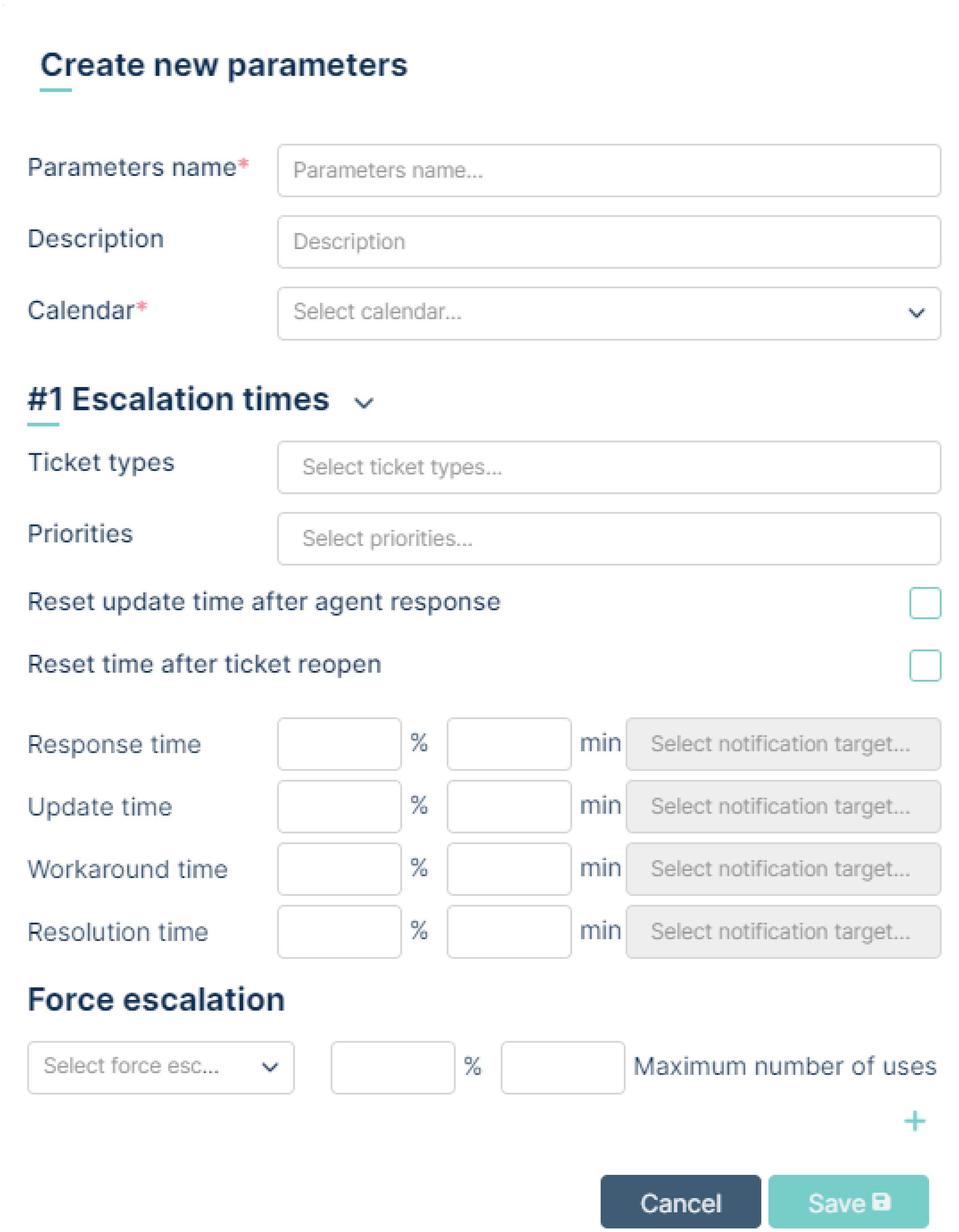
You can also add a new one by clicking on the button on the right side. It will open the same window that is presented in the previously described 'Services' section while creating a new Service.



If you want the service to be required when creating the ticket, select 'Service is required' checkbox.

Once you selected or created a service you can add some 'Priorities' that will be available for the tickets related to this Contract. Those priorities will be available to choose from on the 'Create new ticket' screen. Also, priorities can be created and managed in the 'Priorities' section of the system, which will be described soon in one of the chapters.

The last thing you can add to your Contract is 'Parameters'. You can either select one available from the list (if you already created any in the 'SLA parameters' section of the system) or click on the button on the right side. It will open a new window where you can create your new parameters for the SLA.



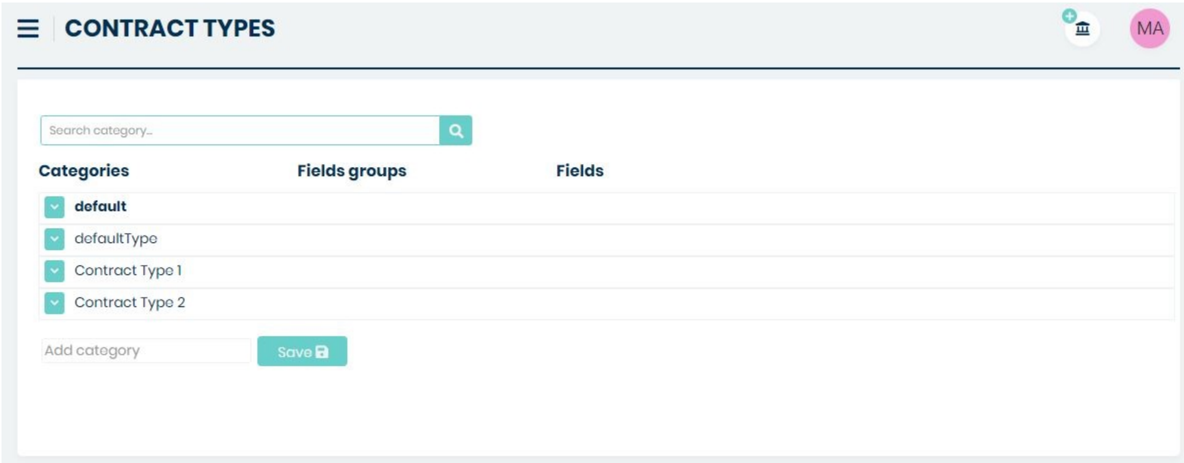
The detailed process of creating Parameters will be explained in the 'SLA parameters' section of this guide.

When you finish, just click on 

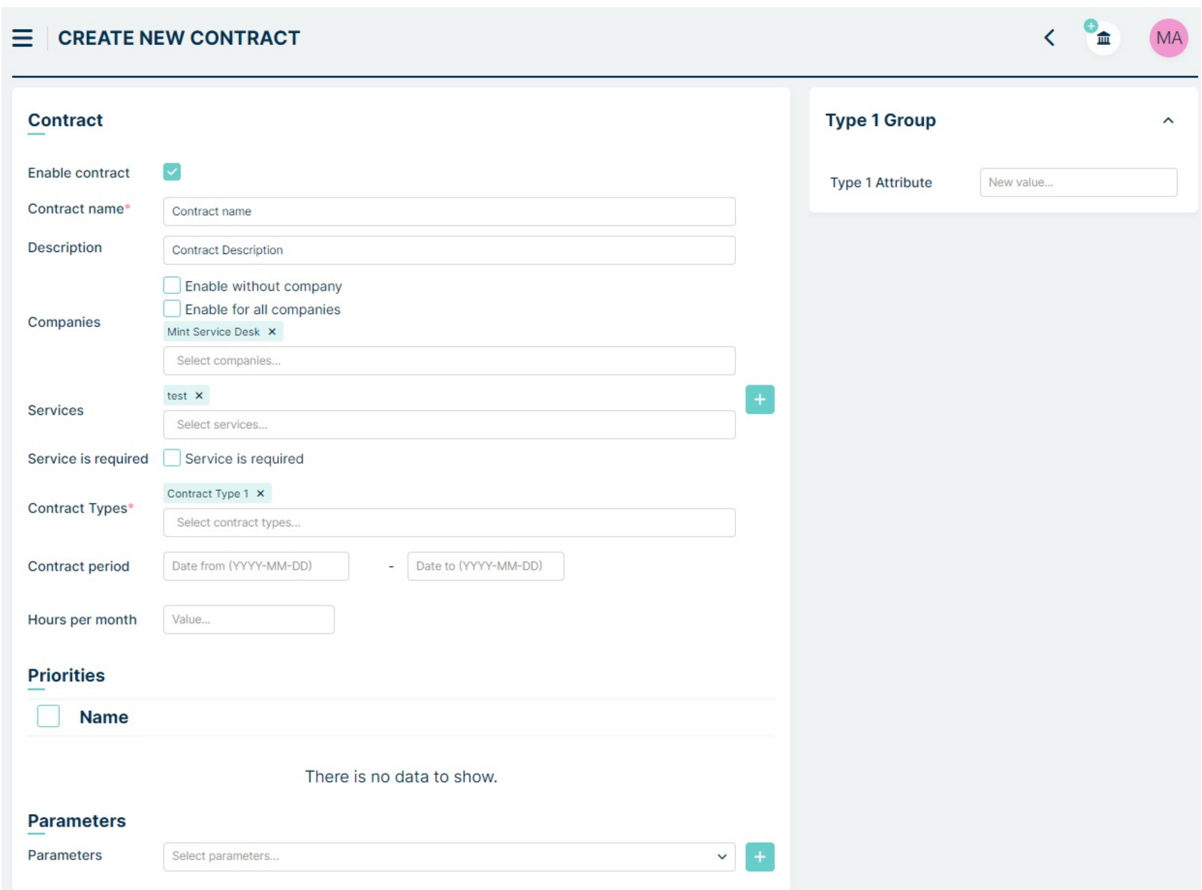
button.

5.8.2 CONTRACTS TYPES

The process of configuring 'Contracts Types' is identical to configuring, for example, Users/Custom Fields or Ticket/Custom fields (but without the section related to permissions).



If you select a preconfigured Contract Type when configuring a contract, new fields will appear on the right side.



Contract Period

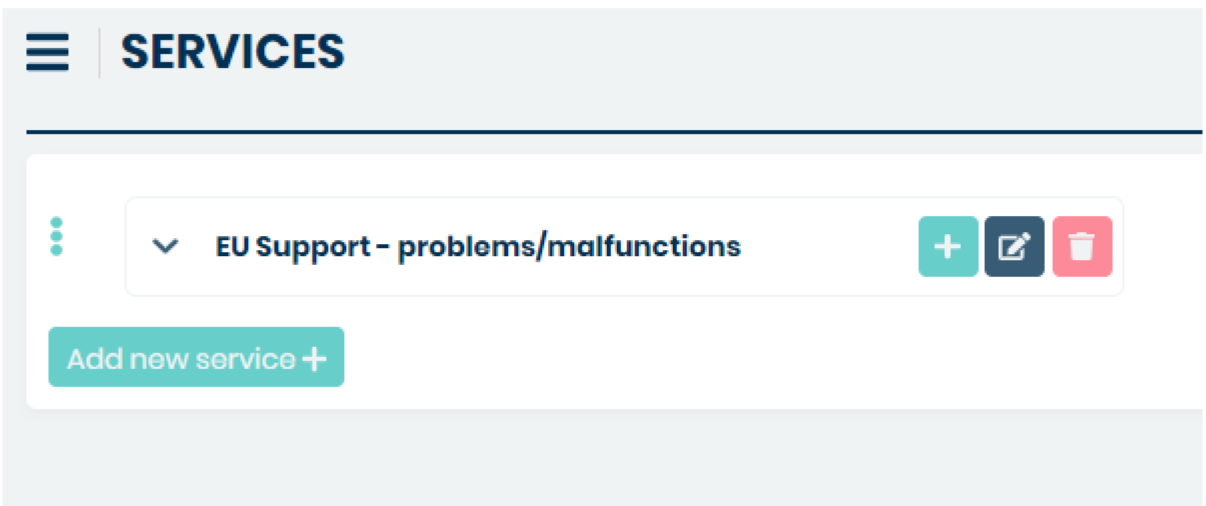
You can set the period of time that contract will be available to choose in ticket details.

Hours per month

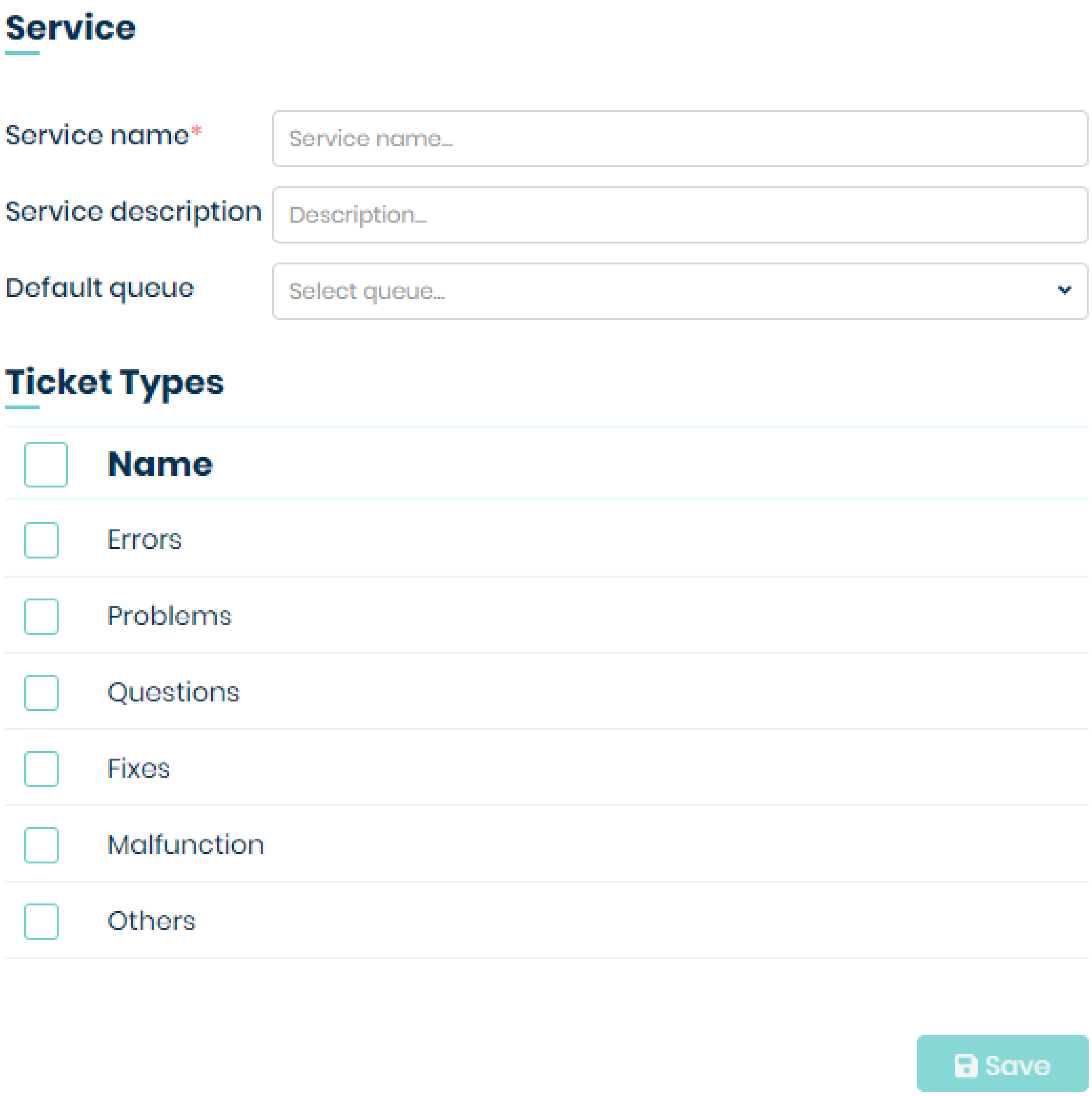
You can set here, how much time per month can be reported in contract. This field is related with “Spent time” field in ticket details. When you set the time in “Hours per month” and save, you will see additional information about time

5.8.3 SERVICES

In this part of a system, you can add and manage all of your Services.



In order to start adding a new Service, you need to click on the  button. You will see that a new section has been opened.



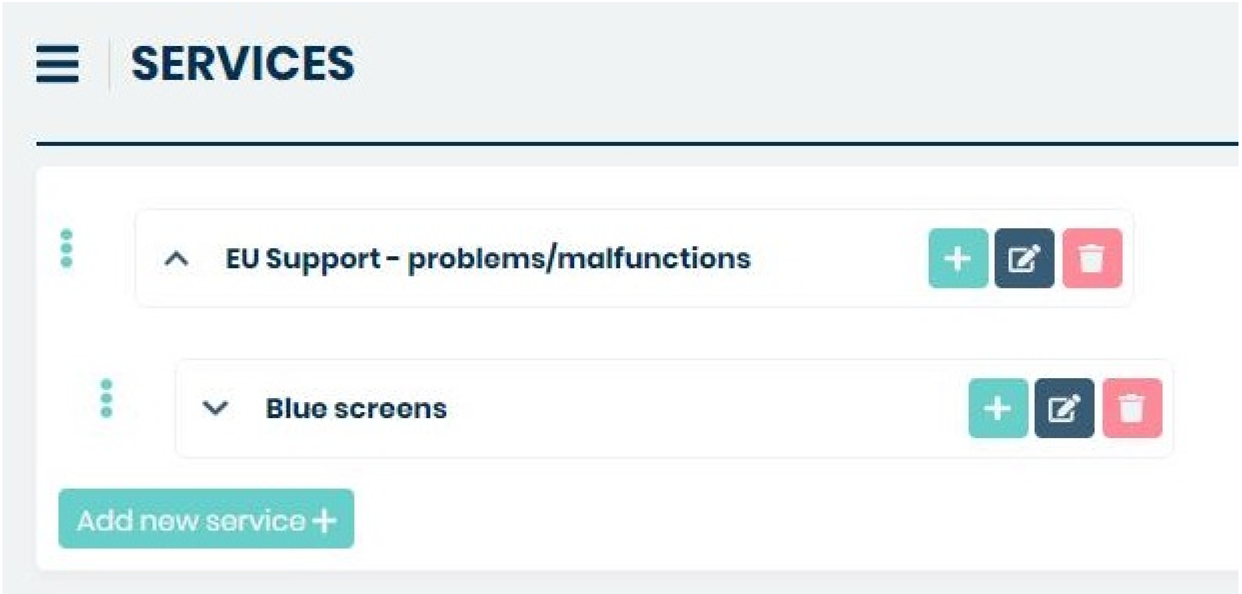
Now you need to type a name for your Service ('Service name'). It is required (field is marked with *). If you want you can add some additional description (optional).

You can also select Ticket Types and Default queue for which this new service will be available for choosing. When you finish, just click on the 

button.

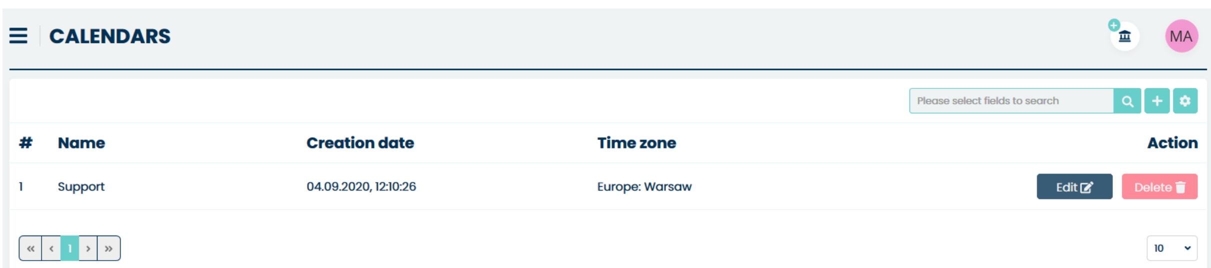
If you want to make some changes in already existing Service, you can do it by clicking on the  button. If you want to delete any of the services, just click on the  button.

If you want to add a new 'child' service to the main service you need to use  button. Once you click on this button a new position will appear right below the main service.

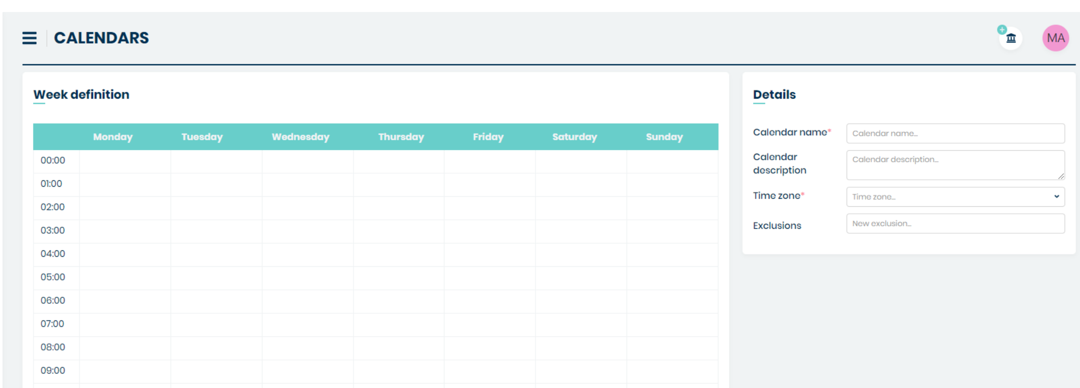


5.8.4 CALENDARS

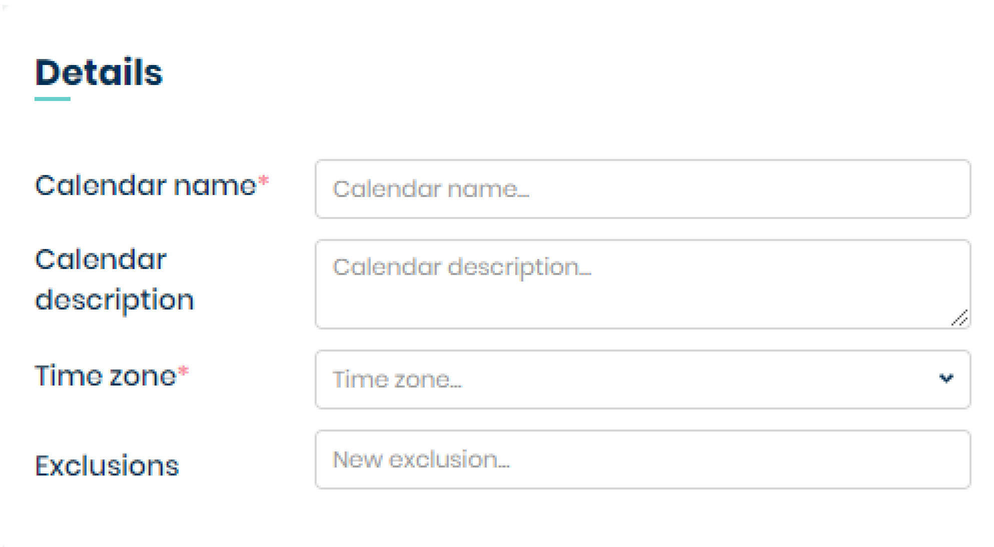
In this part of the system, you can create 'Calendars' – a weekly period definitions for e.g., support windows for your customer. Those calendars can be later added for each SLA parameter set. Please check the Services > SLA parameters part of this guide for more info.



In order to add a new calendar, you need to click  button and you will go to the 'Week definition' screen along with the 'Details' section on the right side.

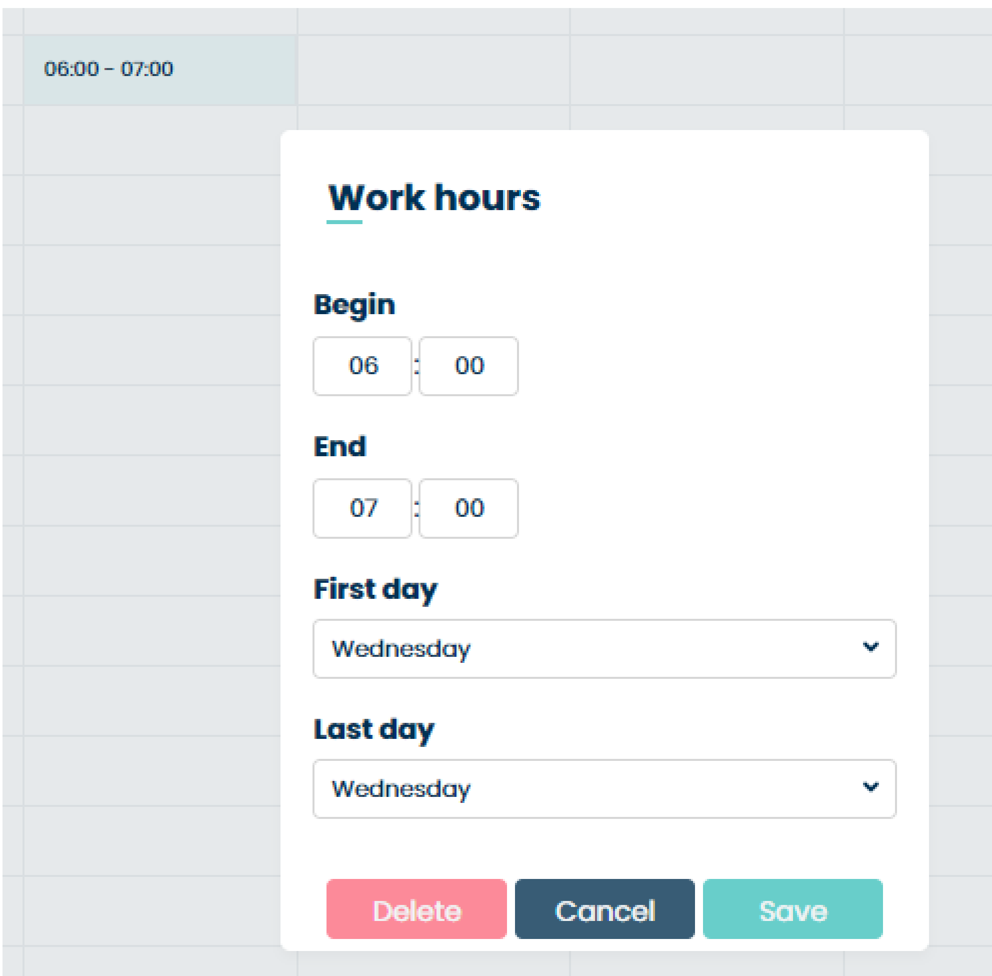


Let's start with the 'Details' part. Right here you need to type the name for your calendar ('Calendar name') and choose a 'Time zone' – the one that is correct for your location. You can also include some 'Exclusions' (more than one) in case of Holidays/National days etc. when your support windows might not be available for your customers.



Now, in the main section 'Week definition' you can start adding support windows for each day of the week.

You can select a single one-hour slot just by clicking on the chosen slot. It will open a small window where you can change the starting and ending hours, or even the starting and ending day.



If you've changed your mind and want to delete this time slot, just use 

button. If you want to cancel the changes you made (before saving them), hit the 

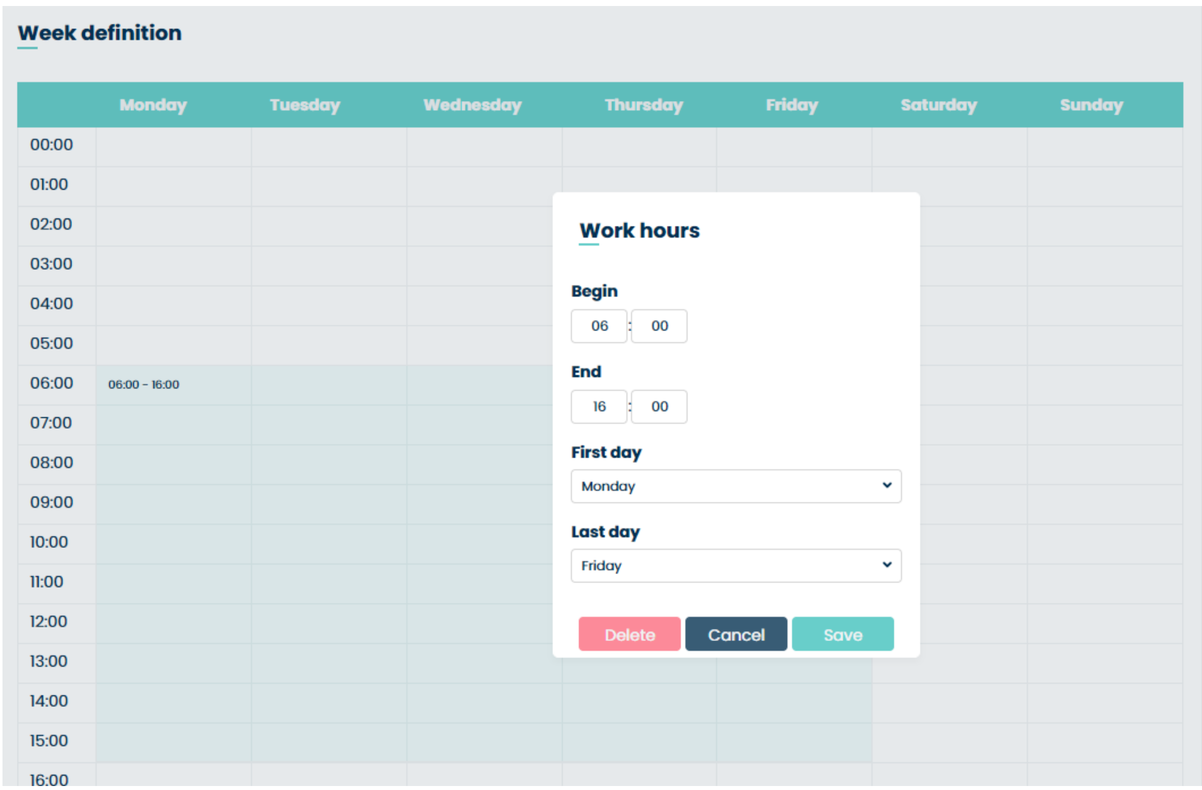
button.

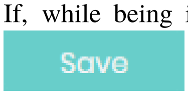
Once you finish you need to click the 

button.

You can also select a bigger time slot than just one-hour. Just click on one place and, while holding the Left Mouse Button drag the mouse cursor in any direction (vertically and horizontally).

Once you release the Left Mouse Button, the selected area will be marked, and you will see the beforementioned window. By doing that you can, in one move, select for example 5 days (Monday – Friday) support window within the same hours.



If, while being in this newly opened window, you change Starting/ending hour or Starting/ending day and hit 

button, the window will be closed, and the previously selected area will be updated according to the changes you made.

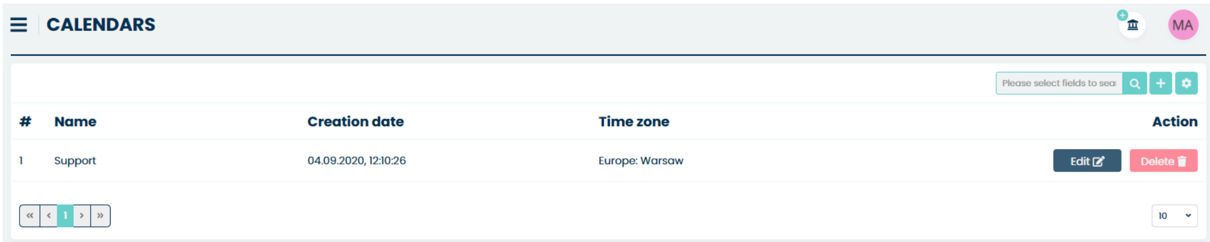
If you want to make some changes in already created and saved time area you can do in two ways.

The first one is that you can click on the icon located in the bottom right corner of each separate time area and while holding the Left Mouse Button change the size of that time area.

The second one is that you can always click on any of the time areas and the previously mentioned window will be opened allowing you to choose time ad day range.

When you decide that everything is as it should be ('Details' data and support windows on 'Week definition' section) you can click on the 

button. A new calendar will appear now on the calendars list.

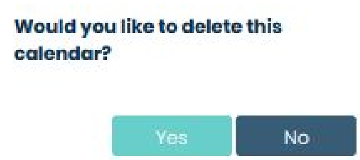


If now you will decide you need to make some adjustments to the time slots, click on the 

button and you will be moved to the calendar edition view.

If you decide that any of the calendars is not needed anymore, you can get rid of it by clicking the 

button and confirming your choice by clicking YES in the confirmation windows.



5.8.5 SLA PARAMETERS

In this part of a system, you can add and manage all of the SLA parameters which can be added to any of the SLA (in the SLA section, while creating or editing an SLA).

ACTIVATION SCHEME

The SLA activation process in a ticket follows the scheme below.

1. New Ticket

The process begins with a new ticket.

2. Checking if the Ticket Has an Assigned Contract

- **Yes:** The system verifies whether the contract is appropriate based on the ticket type and SLA priority:
  - **If the contract is appropriate:** The system assigns the contract to the ticket. The algorithm terminates.

3. Checking if the Ticket Has Both a Company and a Service

- **Yes:** The system retrieves contracts that are suitable for both the company and the service associated with the ticket. Then system verifies whether the contract is appropriate based on the ticket type and SLA priority:
  - **If the contract is appropriate:** The system assigns the contract to the ticket. The algorithm terminates.
  - **If the contract is not appropriate:** The system checks if the ticket has a company:
    - **Yes:** The system retrieves contracts for all companies.
    - **No:** The system retrieves contracts for tickets without assigned companies. The system then verifies whether the retrieved contracts are appropriate based on the ticket type and SLA priority:
      - **If the contract is appropriate:** The system assigns the contract to the ticket. The algorithm terminates.

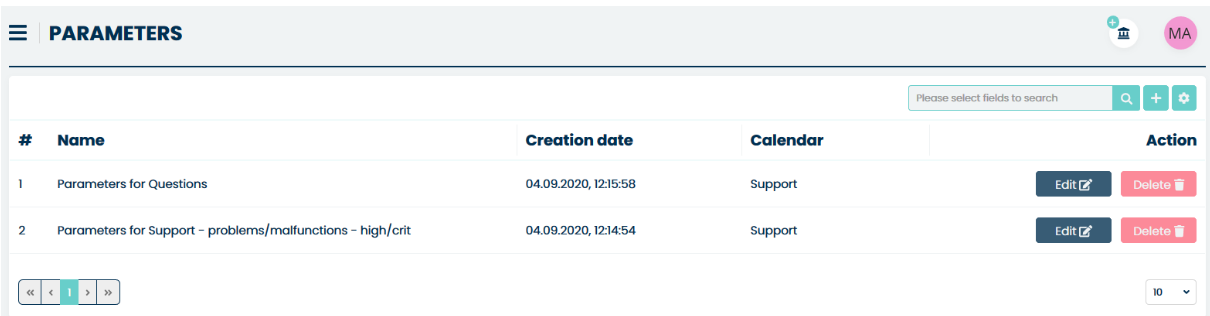
4. Checking if the Ticket Has an Assigned Company OR Service

- **If it has a company or a service:** The system retrieves contracts assigned to the company or service associated with the ticket. Then system verifies whether the contract is appropriate based on the ticket type and SLA priority:
  - **If the contract is appropriate:** The system assigns the contract to the ticket. The algorithm terminates.
- **If it has neither a company nor a service:** The system retrieves contracts for tickets without assigned companies. It then verifies whether the contract is appropriate based on the ticket type and SLA priority:
  - **If the contract is appropriate:** The system assigns the contract to the ticket. The algorithm terminates.

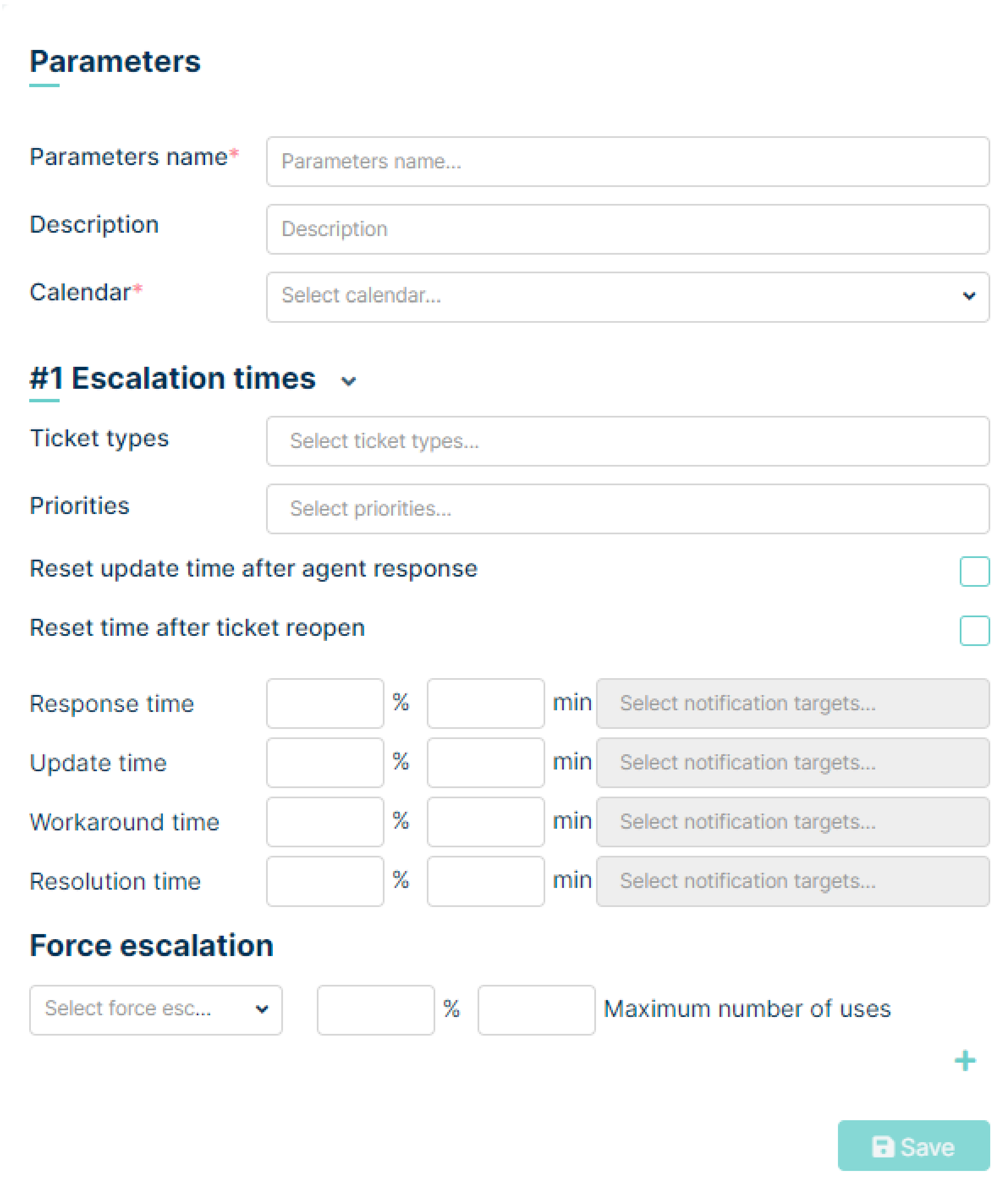
5. If No Suitable Contracts Are Found

If previously found contracts are not appropriate, the system attempts to determine SLA parameters based on the ticket queue. If the system does not find suitable parameters, the process ends without assigning an SLA.

CONFIGURATION



In order to add a new set of parameters, you need to click on the  button, located on the right side, next to the search field. You will see that a new section has been opened.



In this place, you need to type the name for your set of parameters ('Parameters name') and select a 'Calendar' from the list. If you don't see any Calendars available, you need to create at least one in the Calendars section.

The second, very important thing, that needs to be done here is setting an 'Escalation times'. You can add more than one Ticket Type and Priority for which Escalation times will be used.

For each Escalation time you need to specify 4 levels of reminders:

- **Response time**: the time during which the Agent must respond to the new ticket. Time stop when Agent respond to ticket or when Agent has been automatically assigned after status change

- **Update time**: the time within which the Agent must answer to any new message after the communication has been started. Time is counted separately for each message and is reset by Agent or Customer article, depending on checkbox setting: "**Reset update time after agent response**""
- **Workaround time**: the time used to determine the workaround time (the time within which the Agent must find workaround solution for issue that Customer reported in ticket). Workaround time stop when ticket status change to "Workaround"
- **Resolution time**: the time (counting from the moment that ticket has been created) within which Agent must resolve the Ticket.

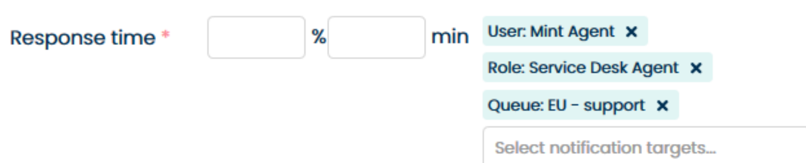
You can also add more Escalation times by clicking the + button.

In every of those 3 abovementioned escalation times, you must specify the moment when the Agent (or any other person you choose) receives a notification that "time is running out" for an Agent to make an action.

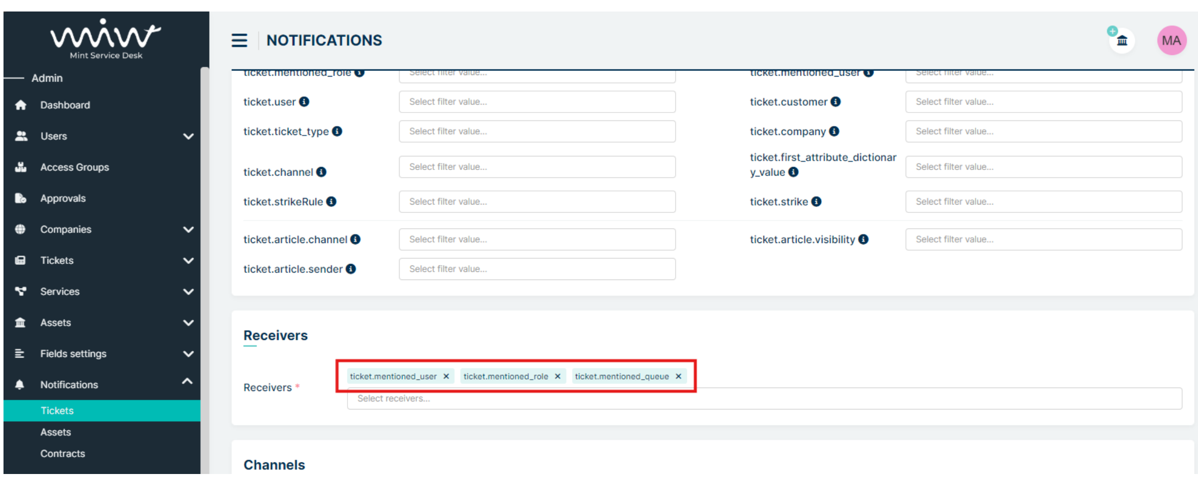
For example, **10** % **240 min** means that 24 minutes from time start (**10% of 240 minutes**) an Agent will receive a notification.

The first field (**10 %**) means a percentage of the whole time available for the agent. The second field (**240** min) specifies the whole time an agent must make a specific action before the timer ends and SLA conditions will not be fulfilled.

If you want to send the notification for more than one person you can also add more positions in the 'Select notification targets…' field. You can also set the system to send up a notification for people with specific Role or even send a notification to everyone assigned to the chosen queue.



Please note that if you want the above notifications to work, when configuring notifications in the Notifications tab in the Admin, you need to select the following as Receivers respectively: **ticket.mentioned_user, ticket.mentioned_role, ticket.mentioned_queue**



At the very bottom, the **Force Escalation** option is available.

In the first field, select the type of escalation. There are four options to choose from:

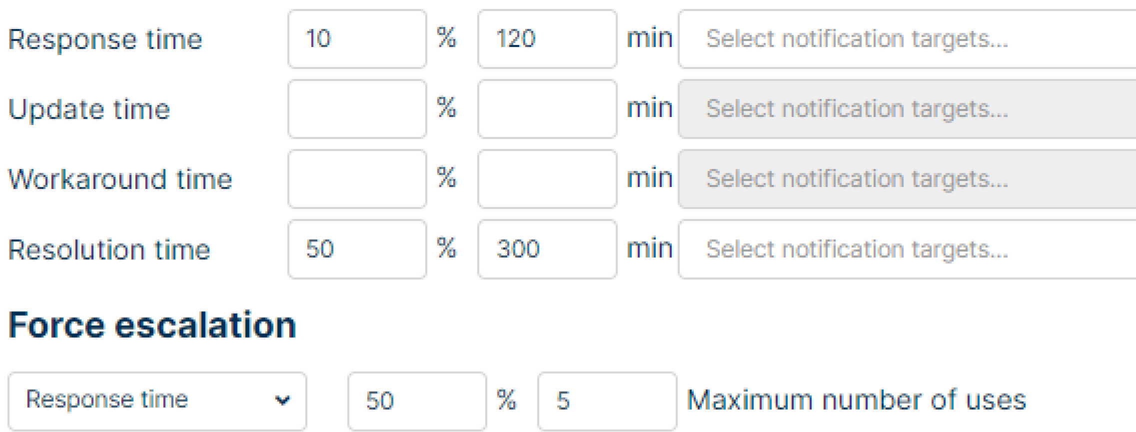
- Response time

- Update time
- Resolution time
- Workaround time

In the next field, enter a number from 0 to 100, which indicates after what percentage of time you want force escalation to activate.

In the third field, specify how many times the customer will be able to escalate the ticket.

Example configuration:



This example shows that the user will be able to escalate the request five times after 50% of the response time has elapsed. (50% of 120 is 60, so after one hour the customer will have this option available.)

When you finish, just click on the 

button to complete the process of creating SLA parameters.

5.9 ASSETS

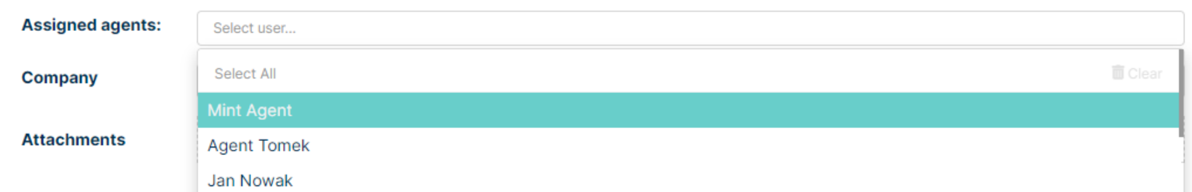
5.9.1 CREATING NEW ASSET

On the top right side of the Agent portal, on the bar menu, you will find 'Create Asset' that allows you to create new assets.

Once you click on this button, you will be moved to the 'Create asset' view.

Now, you need to put in the required information (marked with *): "Name" and select the right "Category". If you want you can also add a detailed "Description" or even some attachments (pictured, .pdf files, etc.).

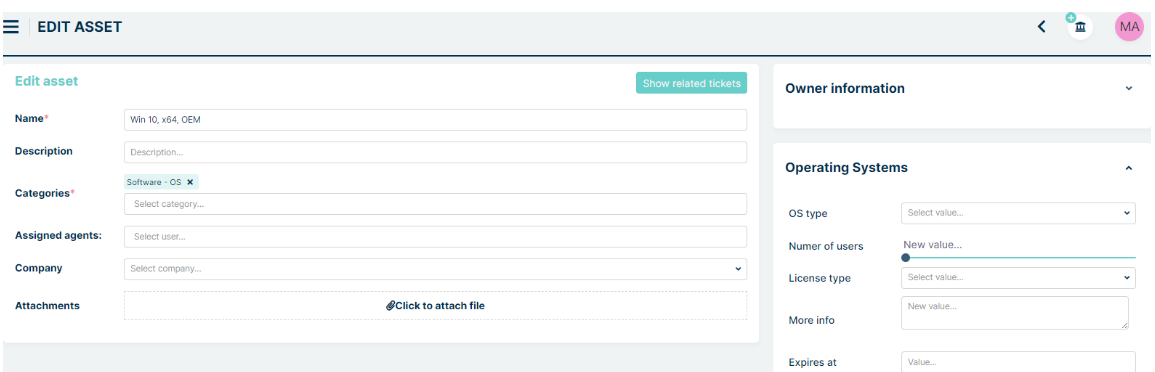
As an Admin, you can assign the asset to a particular agent or company user. For example, a mobile device used by one of your agents.



Once you fill up all the information, click on the 

button.

The 'Create asset' view will be refreshed, and you will see that some additional fields have been created on the right side. Those are additional attributes available for the chosen Category of Assets. They can be created and managed by you in Assets > Assets definition part of the system.

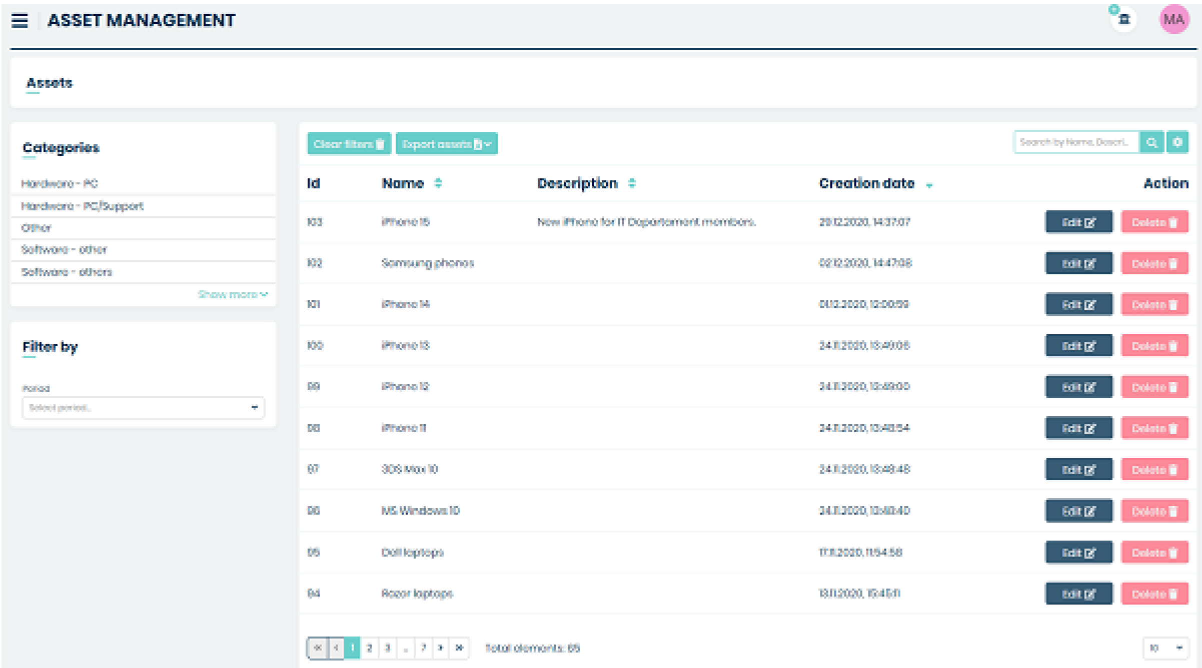


Once you add that additional information, you can update the asset by clicking on 

button.

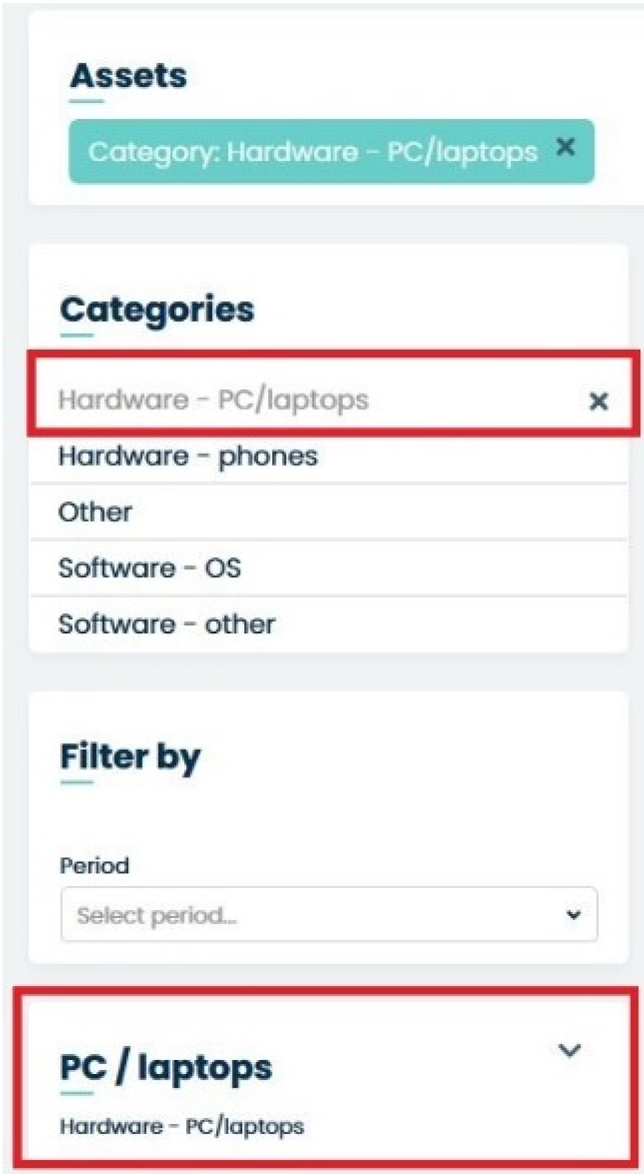
5.9.2 ASSETS MANAGEMENT

This is the place, where all of the assets in the system are managed. Right here, you will find the list of all your assets, as well as the possibility to make any changes in any of them.

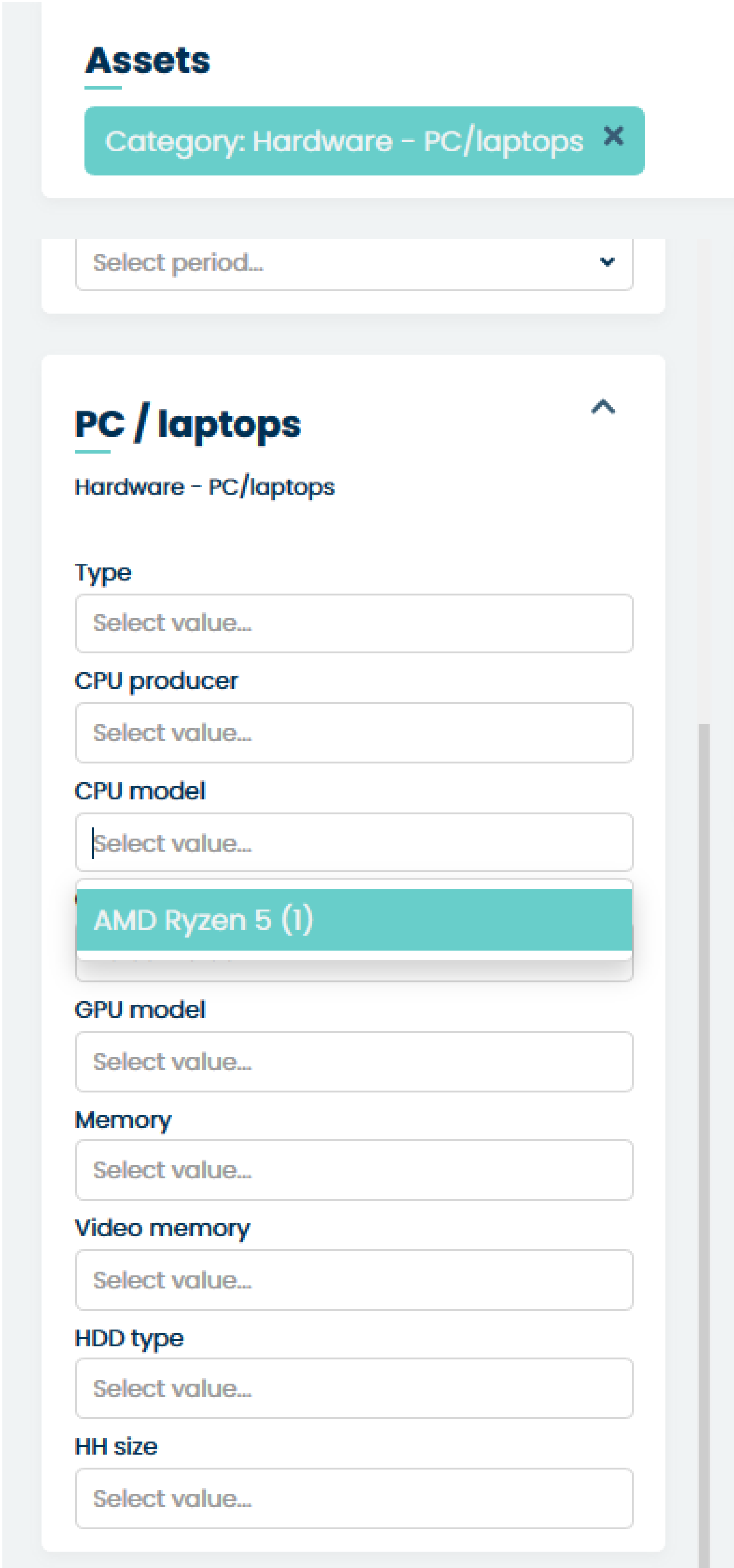


Right here you can filter those assets by 'Categories' or by 'Period' (time period when assets have been added). If you want to reset active filters, just click on the Clear filters button. You can also remove any selections (Categories, Filters, Attributes chose values) by clicking on ✕ or ✕ button right next to each position.

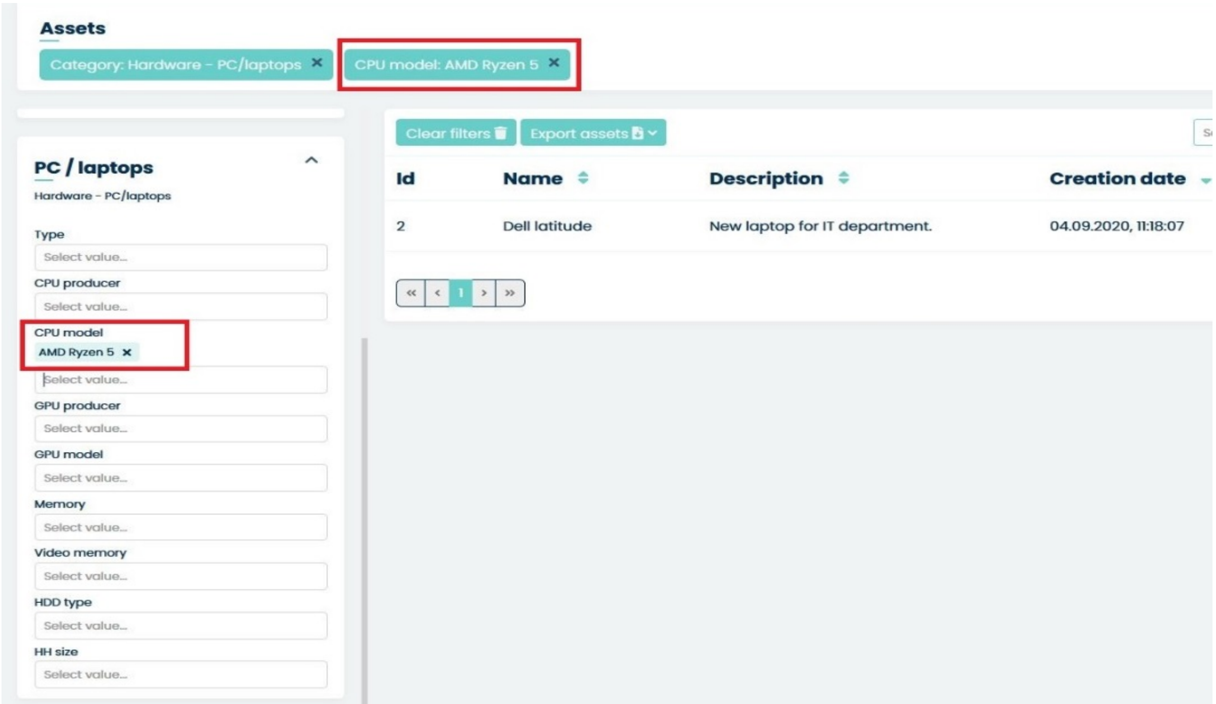
You can also use some more advanced filters. In the lower part of the view, you will find (depending on chosen 'Categories') additional sections. Those filters will be visible only if you check the option 'Search filter' while creating Asset structure (Assets > Assets definition > Assets structure).



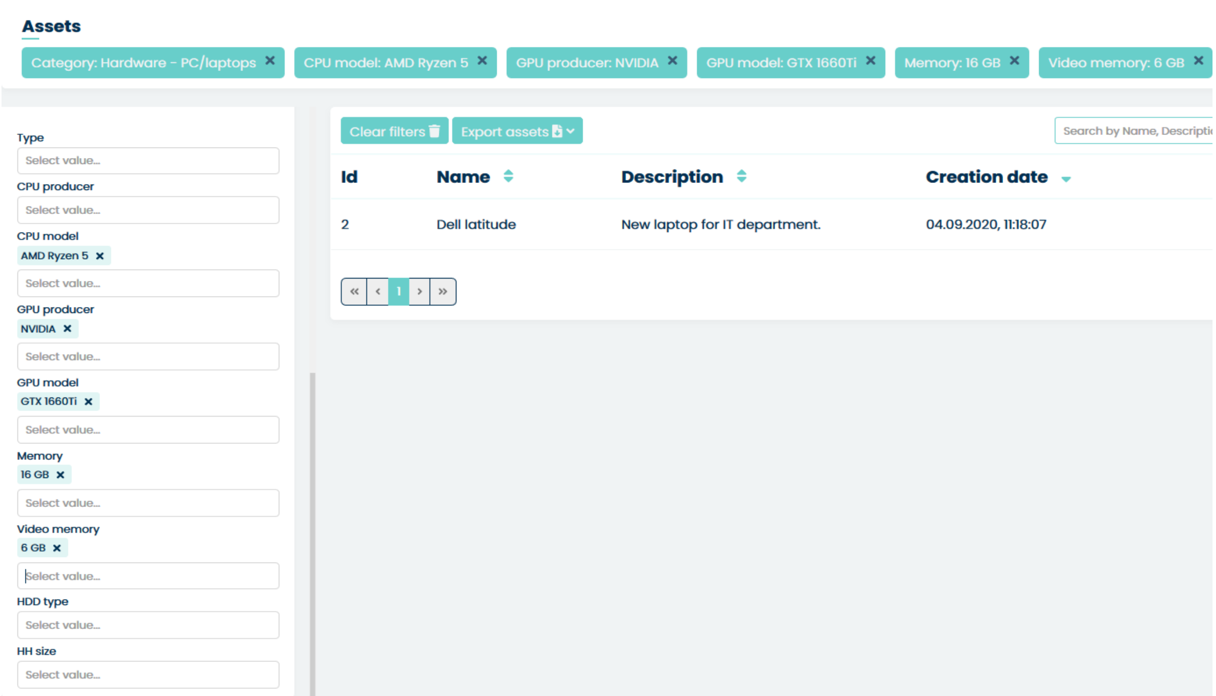
Click on the ⌄ button in order to see the whole list of available filters.


Assets
Category: Hardware - PC/laptops
Select period...
PC / laptops
Hardware - PC/laptops
Type
Select value...
CPU producer
Select value...
CPU model
Select value...
AMD Ryzen 5 (1)
GPU model
Select value...
Memory
Select value...
Video memory
Select value...
HDD type
Select value...
HH size
Select value...

Now you can select one or more filters, for example CPU Model. If you do this the list of results will be refreshed.

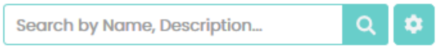


Those filters are basically for attributes of the assets from selected categories. You can select more than just one of them and each time you select another one the result will be refreshed.

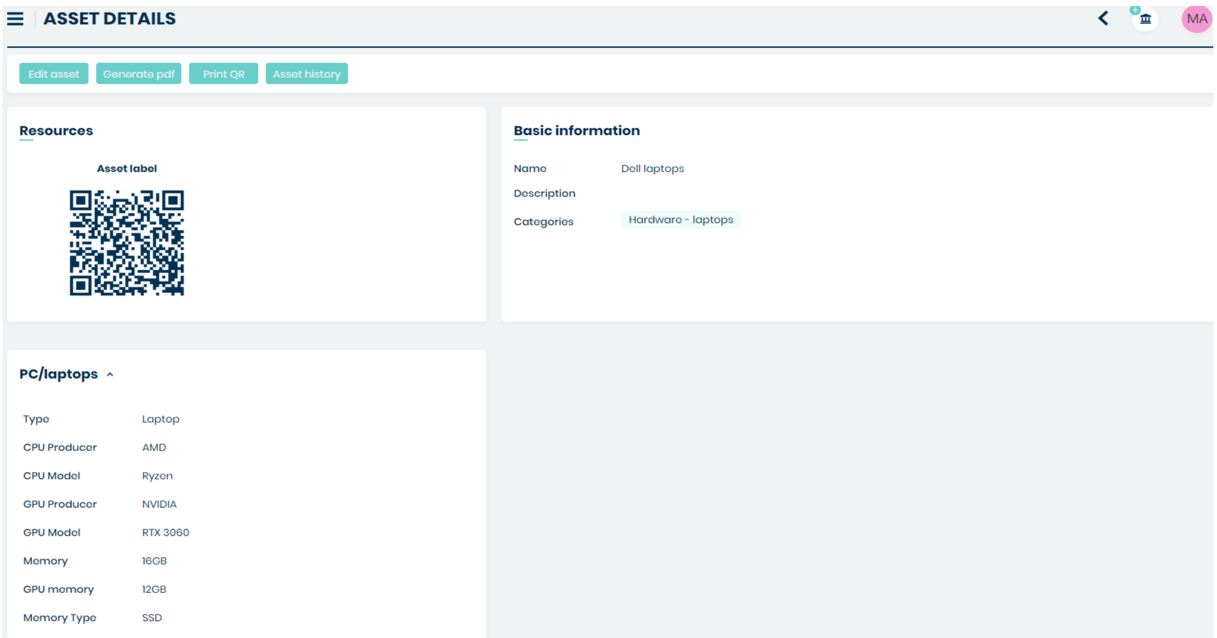


If you want to see some more information on the list of assets (more columns) just use the  'Set column properties' button. It was already described in the earlier parts of this guide.

Also, if you want, you can look for specific assets (for example by asset's name) by using the section "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.



In order to see the Asset information just click on its name. You will be moved to Asset details view.

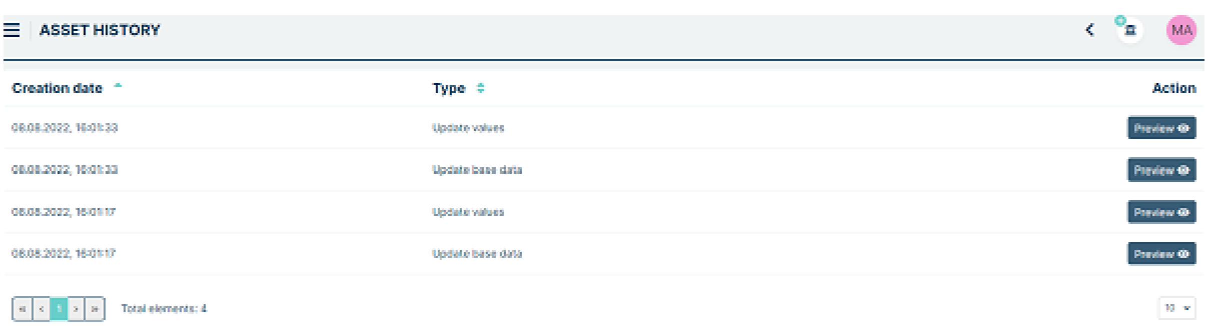


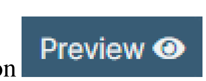
From this view, you can move to 'Edit asset' view. Just click on the  button.

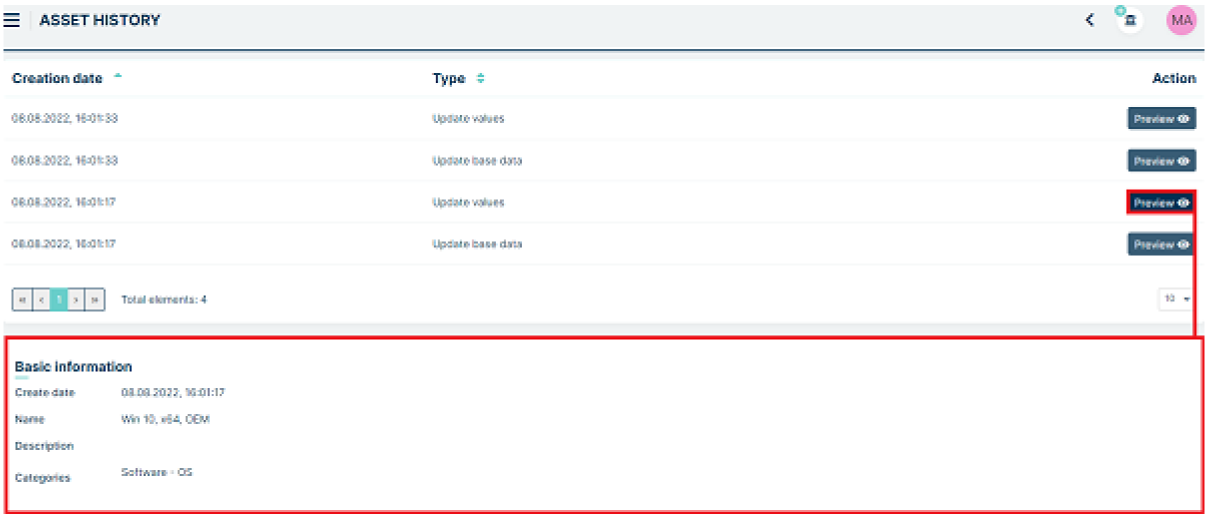
If you want to export asset into pdf file press  button.

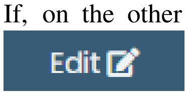
To print the QR code, press  button. After pressing this button, you will be transferred to the print view. In the file will be the QR code and the information configured in Settings > General > Assets.

If you are curious what the history of the selected asset is, press  button. After pressing this button, the user will be taken to a table with a list of changes.

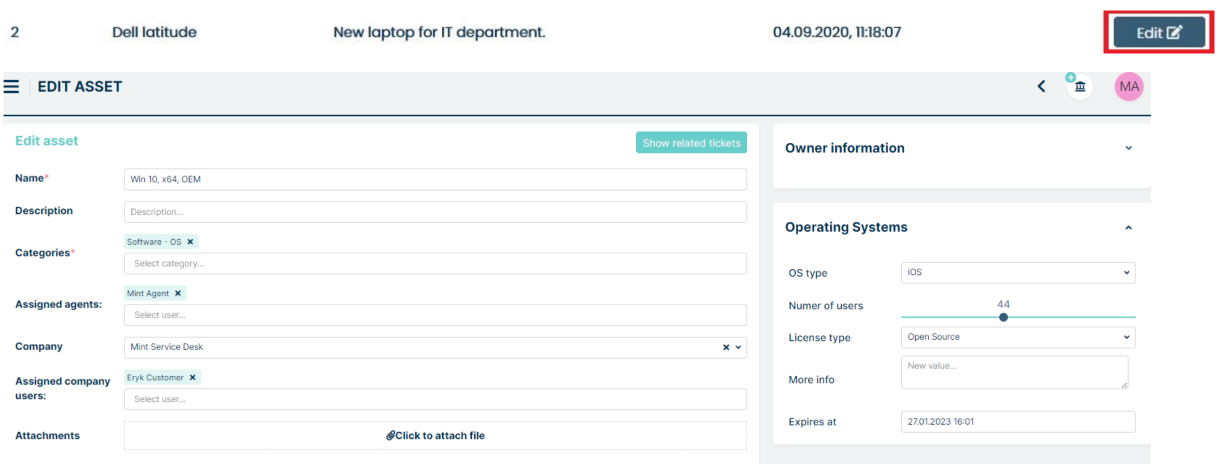


If this information is not enough, there is a button  next to each change that, when pressed, will display more details below the changes.



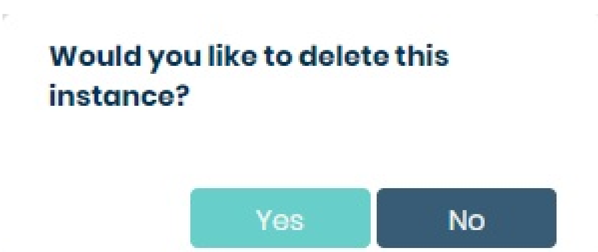
If, on the other hand, you need to access ‘Edit asset’ right from the ‘Asset management’ list simply use the 

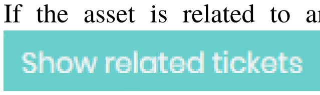
button on the right side.



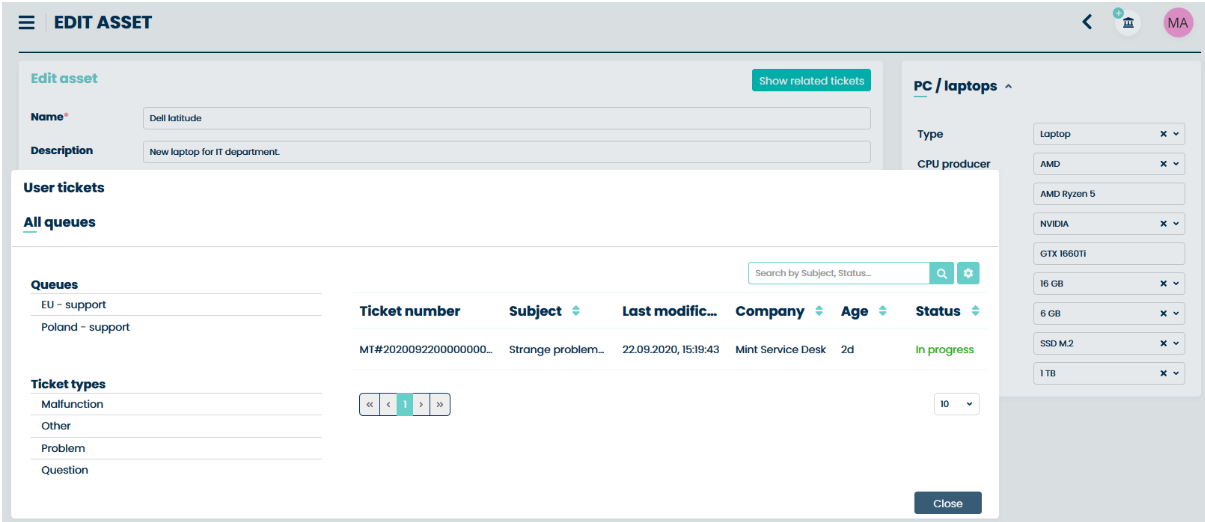
To delete asset, while being on the main ‘Asset management’ view press 

button located on the right side (right next to ‘Edit’ button. Then confirm the operation by clicking the ‘yes’ button.

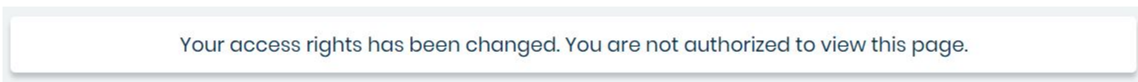


If the asset is related to any of the Tickets in the system you will find it on the list once you click the 

button while being inside ‘Edit asset’ view.



As an Admin you can change all of the attributes and information including the asset 'Categories'. What's most important you can **add or remove a user in the 'Assigned users' part**. If you remove a user from this place, the moment he tries to view the Asset he will receive the information that his access right has been changed.

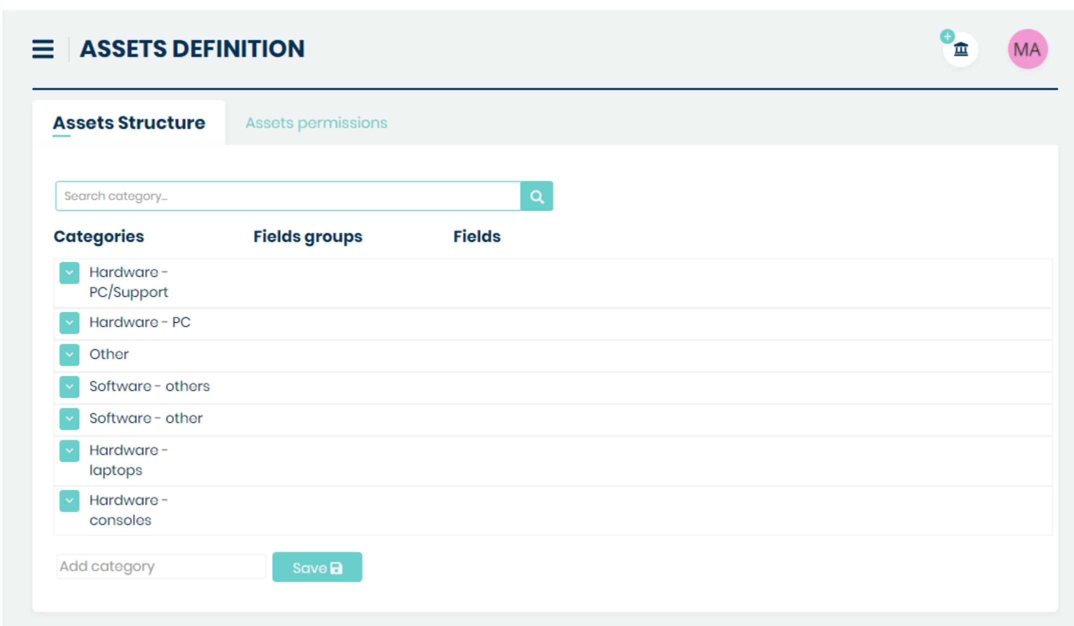


5.9.3 ASSETS DEFINITION

In this part of the system, you can customize the structure for Asset Categories, Groups of attributes, and single attributes with their values. Also, you will change the rights for viewing or making any changes to the aforementioned.

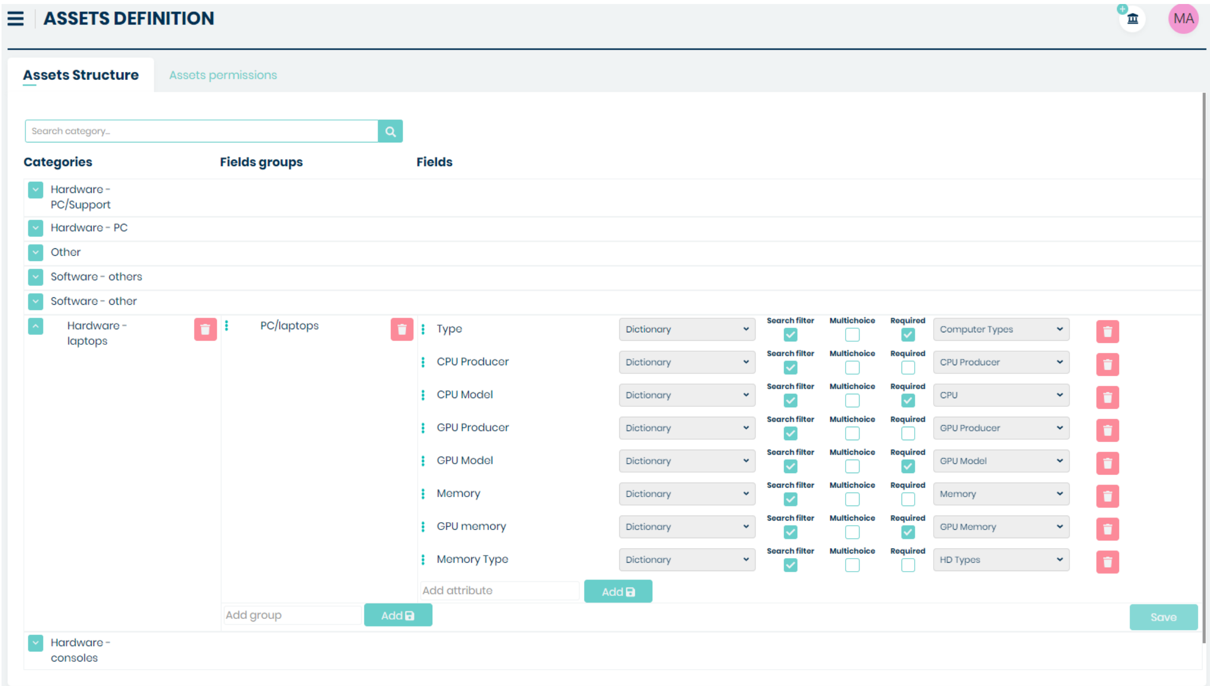
ASSETS STRUCTURE

First is the 'Assets Structure' tab, where you can customize the whole structure for Asset categories along with their groups of Attributes, single attributes, and their values.



By default, the content of each Ticket Type is hidden, and you only see the Ticket type name.

If you want to see the full content of a Ticket Type you need to click button, located right on the left side of the ticket type name.

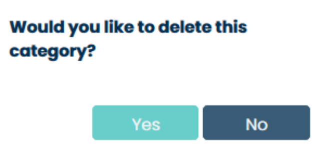


CATEGORIES

You can create different Asset Categories like "Hardware-phones" or simple "Software". To add a new category just click on the empty field 'Add category', type the desired name, hit 'Enter' on your keyboard, or press the 'Save' button.

If you want to rename already existing Category just click on its name, make some changes and click Enter.

If you want to remove it just click on a trashcan icon  located on the right side. In the new window, you will be asked to confirm this action.



Click 'Yes' and Category will be removed. Remember that deleting a Category means also deleting all custom Groups of attributes and single attributes that you have added to this particular Category.

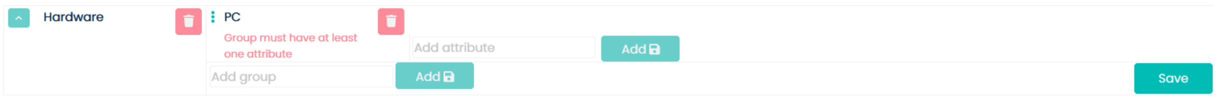
GROUPS

Creating and editing groups works almost the same as it is for categories.

In order to create a new group, click on an empty field 'Add group' and type the desired name.

Now click enter on your keyboard. Try to save the changes by clicking 

 on the right side of the screen. You will see information saying, "*Group must have at least one attribute*". Before you'll be able to save a group, you need to create at least one attribute.



To change the name of the group just click on it, type a new one, and accept the change by clicking enter.

To remove the group, use the trashcan  icon on the right side. Please notice that along with a group you will delete attributes that are inside this group.

ATTRIBUTES

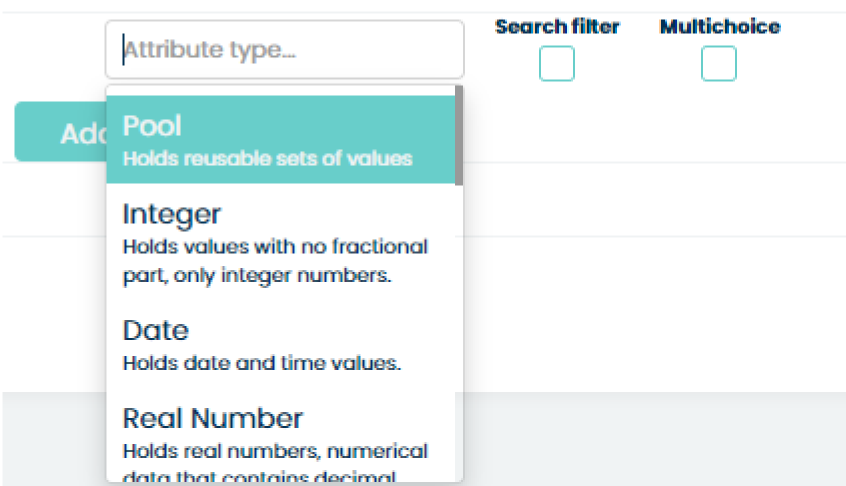
Attributes are the fields that you will use to add detailed information for your assets. Each group must have at least one attribute. Without it, you won't be able to save a new, fresh group.

Adding and editing attribute name as well as removing the whole attribute works the same way as for categories and groups.

However, after typing and accepting a name for the attribute you will have to choose attribute type, decide if you want to be able to search by this attribute in the list of assets ('Search filter' check-box) or be able to select more than one value of the attribute ('Multichoice' check-box).

MINT Service Desk includes a lot of different types of attributes. While selecting 'Attribute type' you can choose it from the long list.

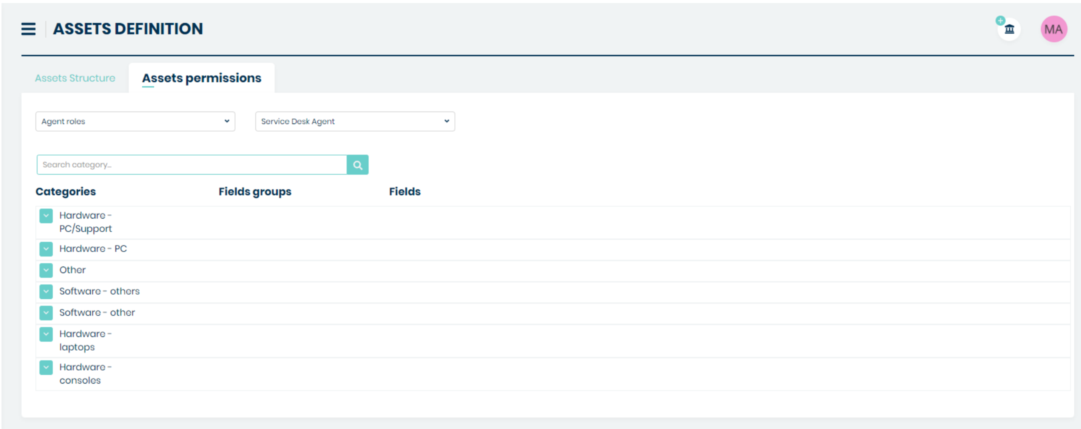
The available types are "Pool", "Integer", "Date", "Real Number", "Text", "Relation", "Date Scope", "Num Scope", "Geolocation", "Text area", "Alert Date", "Attachment", "Radio", "Checkbox", "Label", "Regex", "Dictionary", "Relation Asset", "Relation Ticket", "Relation Contract", "Relation Company", "Relation User" and "SubscribedReceiver"



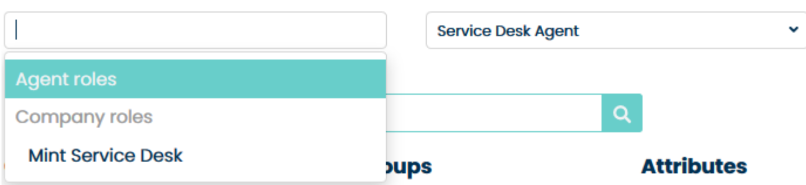
Those types of attributes have already been described in the Tickets > Custom fields > tickets structure part of this guide.

ASSETS PERMISSIONS

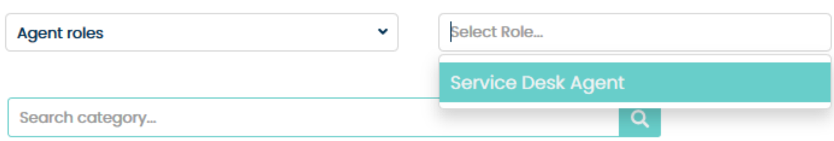
If you change the default tab and switch it to second one: "Assets Permissions" you will be able to select a specific user and grant him or remove his rights to Read (View) or Update (which means not only Update but Read as well – it will also be selected) any of the Asset categories, Assets themselves and their Attributes.



In the first field, you need to select one position from the list of available General types of roles. They can be e.g., 'Agent Roles' (if you have more than one created in Agents > Roles section) or 'Company Roles' (located in Companies > Company Manager section, separately for each company in 'Role' part of the company's details).



After you do that, from the second list you need to select a particular type of Role for which you want to change the rights.



Below you will also find a 'Search category. . . ' search box, where you can type the name of the category that you are looking for, without the need to scroll the whole list.

There are two types of rights in the Mint Service Desk:

- **Read** – allows the user only to view the list of assets from a particular category and their details
- **Update** – it gives the same rights as 'Read' but also allows the user to make changes in the content of an Asset in a category. For example, Agent will be allowed to change the name of the asset or change its attribute's values.

Please notice that when you select the 'Read' it will be selected, but the 'Update' will not be selected.

However, when you select 'Update' it will also select 'Read'. Update means that you can view and change the content of an Asset.

If you want to change the rights for the whole Category you can select the 'Read' and/or 'Update' checkboxes located right next to the Category name.

You can also change the rights for selected attributes. To do so, select checkboxes located right next to the attributes that you are interested in.

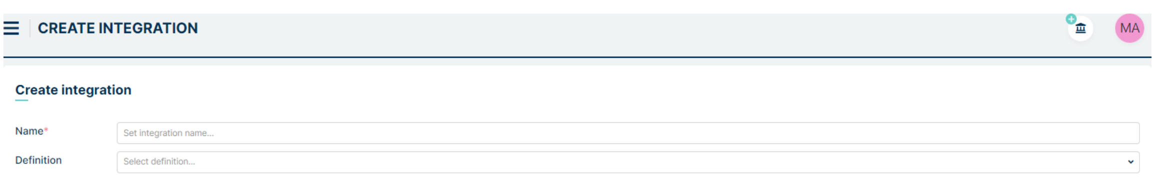
Once you finish making the changes, you need to click  button (located on the right side of the view), otherwise, when you try to leave this part of the system it will inform you that you have some unsaved changes.

5.9.4 ASSETS INTEGRATIONS

This section contains information about integrations by API or from CSV file.

API INTEGRATION

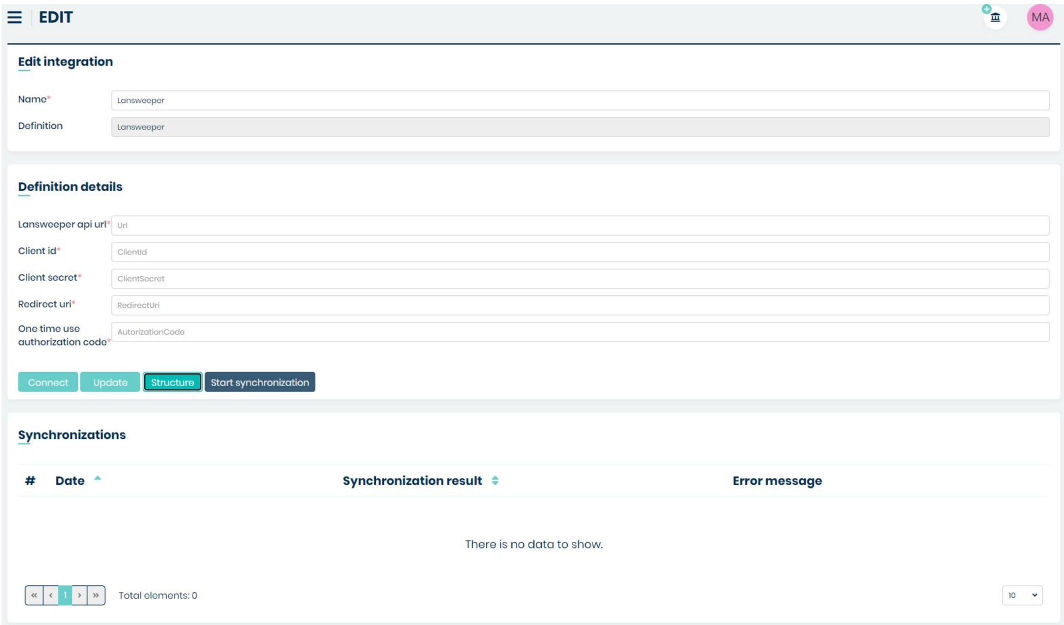
In this part of the system assets can be integrated with Lansweeper. To do this, press the  button.



In the **Name** field, enter the name you want displayed on the list of all integrations. In the **Definition** field, select Lansweeper from the dropdown menu.

To complete the first configuration process, press the  button.

Then return to the list with all available asset integrations and edit the configuration of interest.



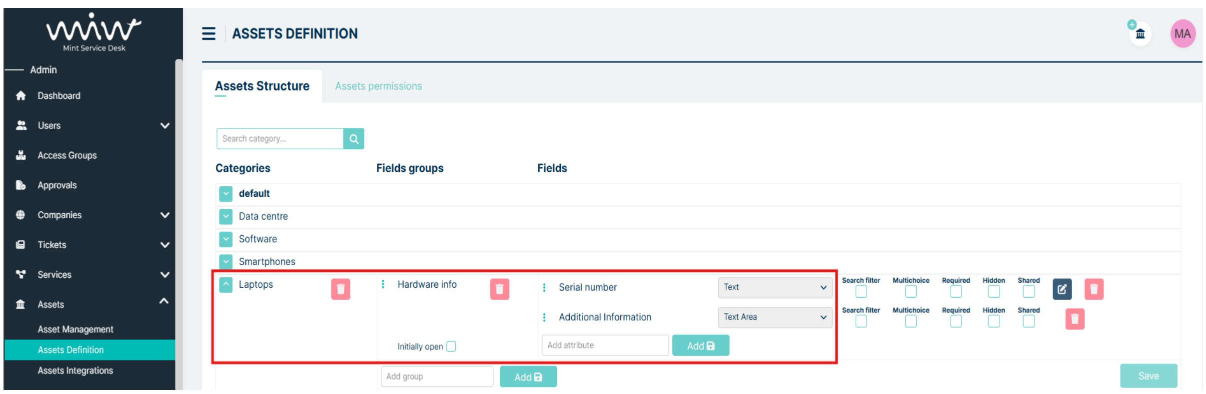
The configuration is similar to Users Integrations, which was described earlier under Users/Users Integrations.

CSV INTEGRATION

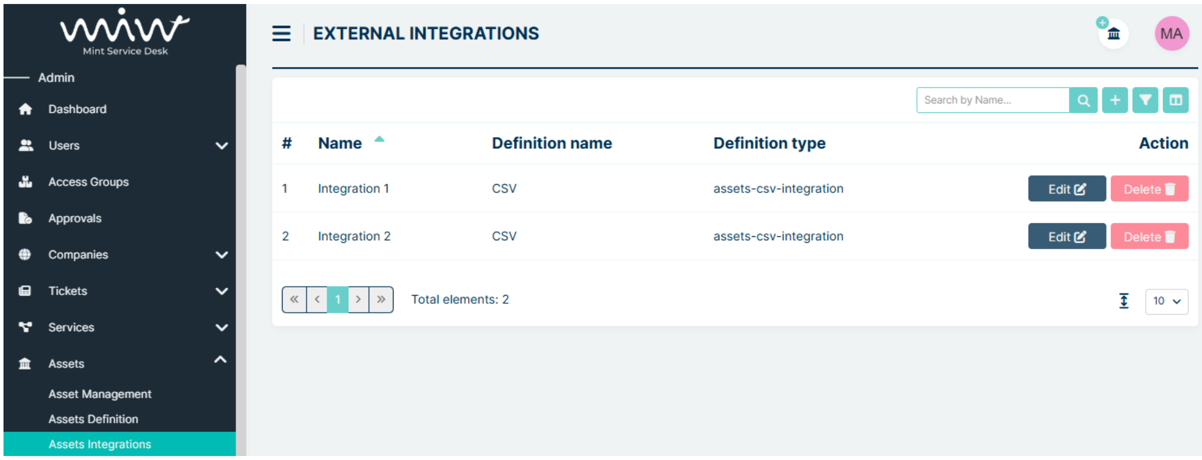
The asset import functionality from a CSV file allows adding new assets as well as updating existing ones in the Mint Service Desk system. This guide is divided into two sections – Configuration and Examples.

CONFIGURATION

Before configuring the integration, you must have an asset category created in the Admin Panel under Assets → Asset Definition. If it does not exist, create a new one and, if needed, define custom fields within that category. This documentation assumes that an asset category and two custom fields are already set up.



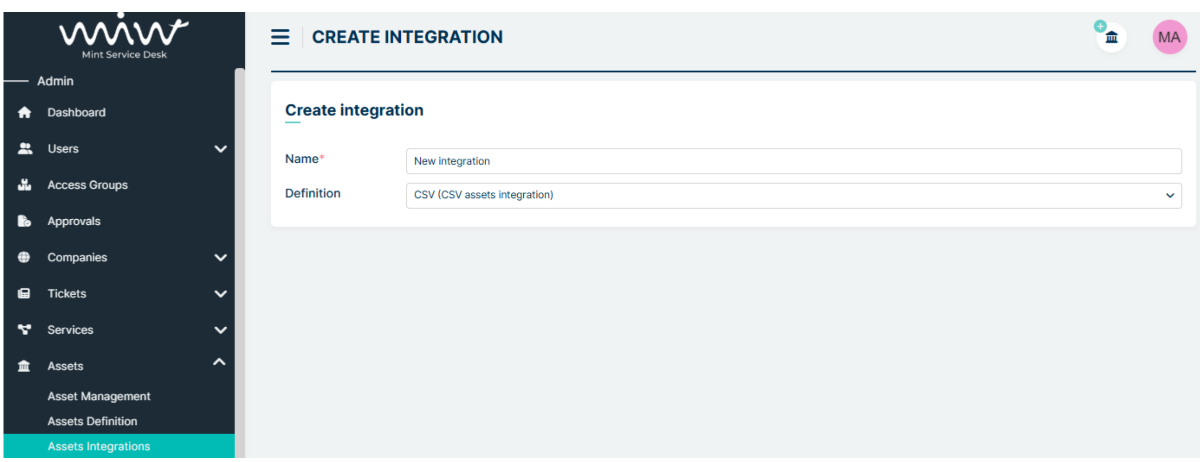
The integration process begins by navigating to the Assets tab and then to the Assets Integrations submenu. The main view presents a table of saved configurations with the following columns:



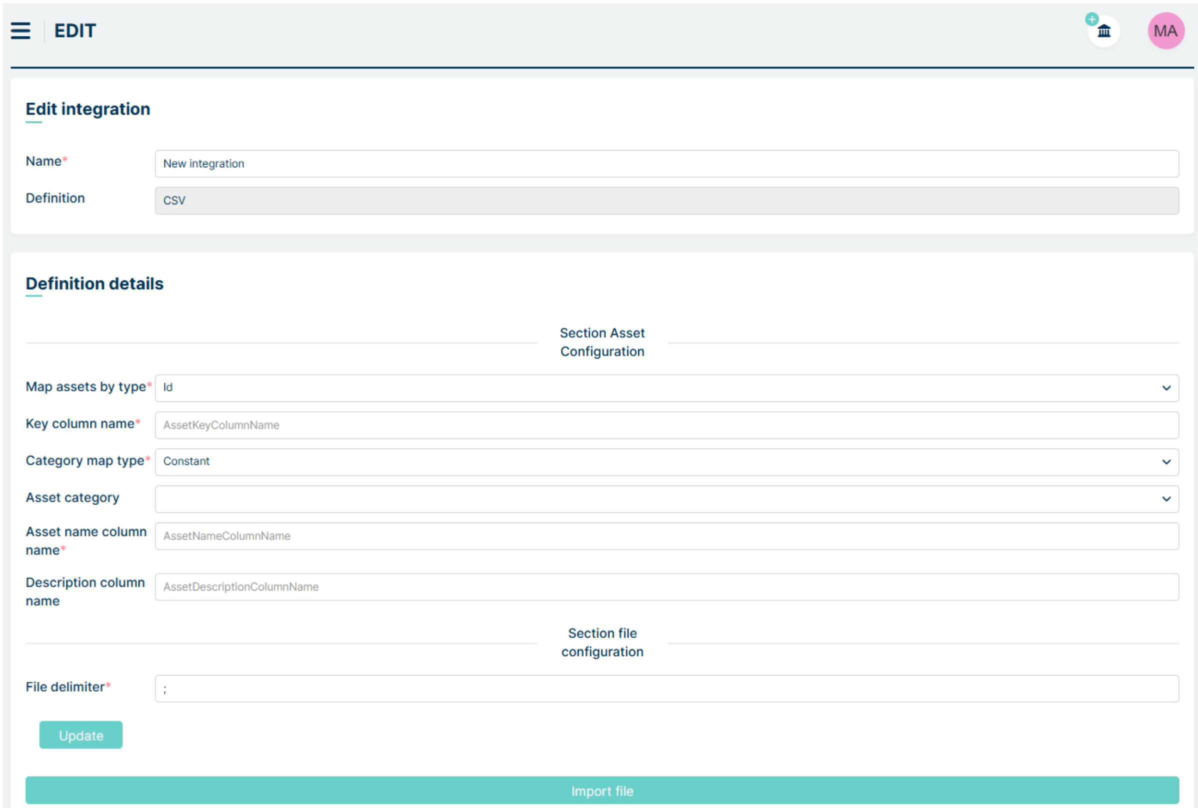
- **Name** – Configuration name
- **Definition Name** – Short name of the configuration type selected from the list during creation
- **Definition Type** – Description of the selected configuration type
- **Action** – Column with Edit and Delete buttons

To create a new configuration, click the “Plus” button in the upper-right corner of the page.

This opens the Create Integration page, where you enter a name in the Name field (any value) and select the Definition Type as CSV (CSV assets integration).

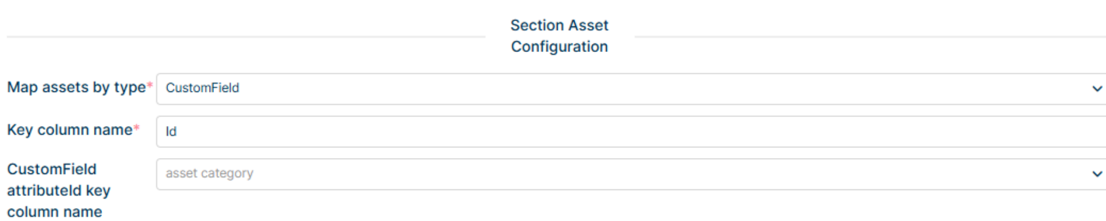


Once the details are filled in and saved, you are redirected to the configuration settings.



Now we can proceed to **Set Asset Configuration Section**. This section includes the following fields:

- **Map assets by type** – This field determines which column or custom field the importer will use to recognize the uniqueness of assets in Mint Service Desk. If the value in the selected column exists, the importer will update the corresponding asset. If it does not exist, a new asset will be created. Available options:
  - **Id** – Corresponds to the asset's unique system number in Mint Service Desk
  - **Subject** – Corresponds to the asset's name
  - **CustomField** – Selecting this displays a new field: CustomField attributeID key column name.

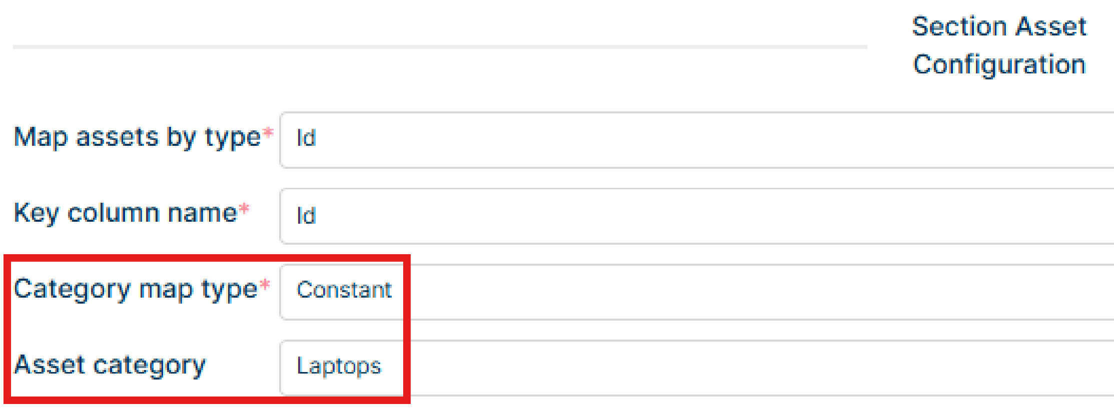
    

    In this field you can select an existing custom field and assign it as the primary key for the asset. First, choose the asset category from the dropdown, then select the associated custom field.

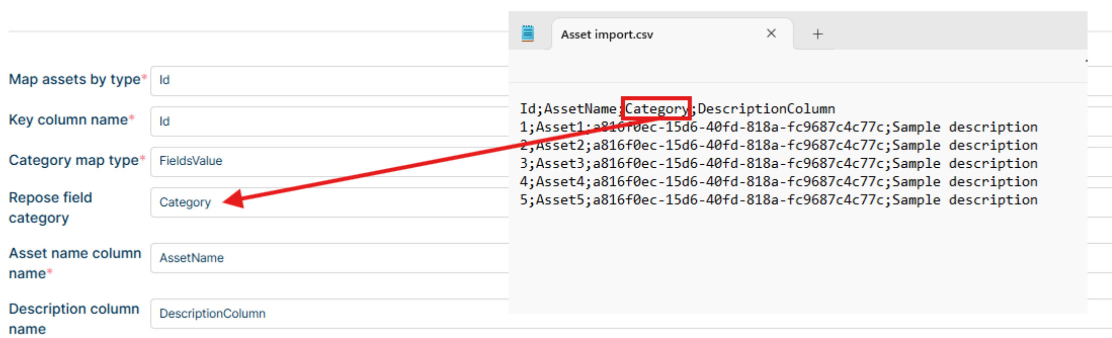
    

Once selected, this field becomes the primary key for the importer.

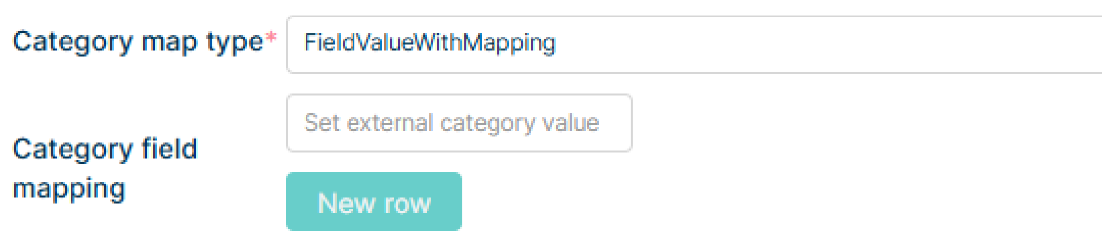
- **Key column name** – Name of the column in the CSV file that corresponds to the key column selected in **Map Assets by Type**.
- **Category map type** – Determines how the importer assigns an asset to a category:
  - **Constant** – You manually select an asset category from the Mint Service Desk system. The importer will only add or update assets in this specific category.



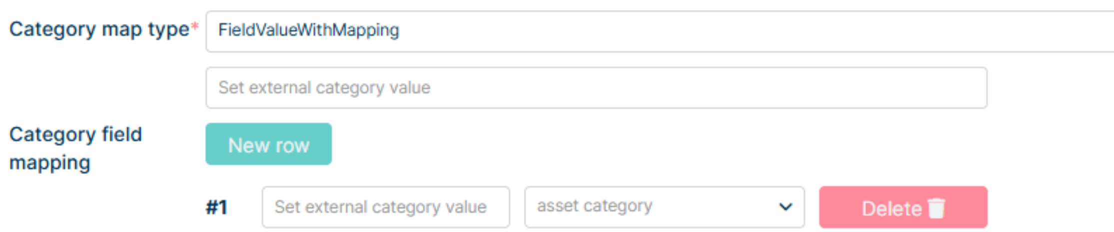
  - **FieldsValue** – You specify the column in the CSV file that contains category values. The category values must be in GUID format (e.g., a816f0ec-15d6-40fd-818a-fc9687c4c77c) and must match category IDs in the Mint Service Desk database.



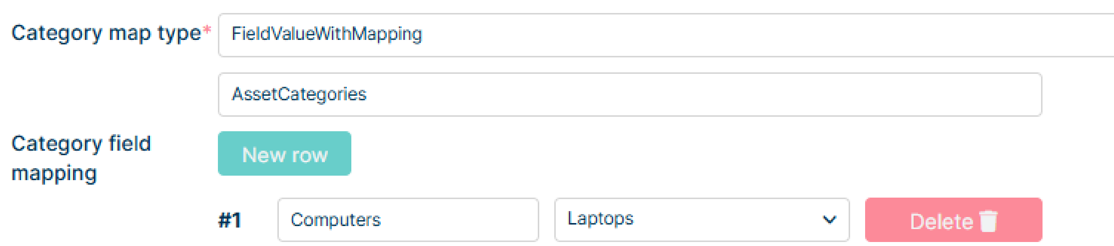
  - **FieldsValueWithMapping** – Allows mapping category names from the CSV file that may not exactly match those in Mint Service Desk. This configuration enables name mapping between the CSV and the system. After selecting this option, the **Category field mapping** section appears with *Set external category value* field and *New row* button.



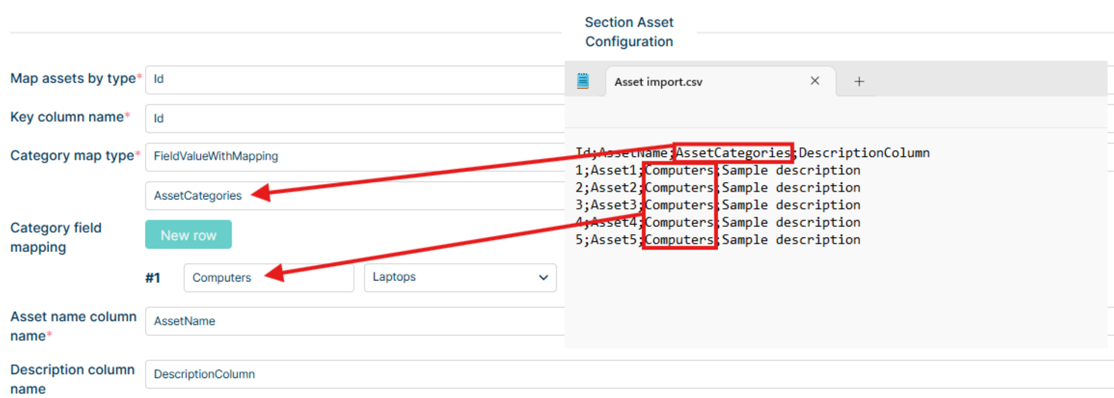
In the field with the placeholder *Set external category value*, we indicate which column in the CSV file corresponds to the asset category. After clicking New row, the first entry (#1) appears with the fields Set external category value, Asset category, and the Delete button.



In entry #1, in the Set external category value field, we specify the first value from the CSV column, while in the Asset category dropdown list, we select the category to which this value will correspond. For example, in the CSV file, we have a column named IT Hardwares with the first value Computers. We want Computers to be treated as a category, but in Mint Service Desk, this category is named Laptops. Therefore, we configure it as follows:



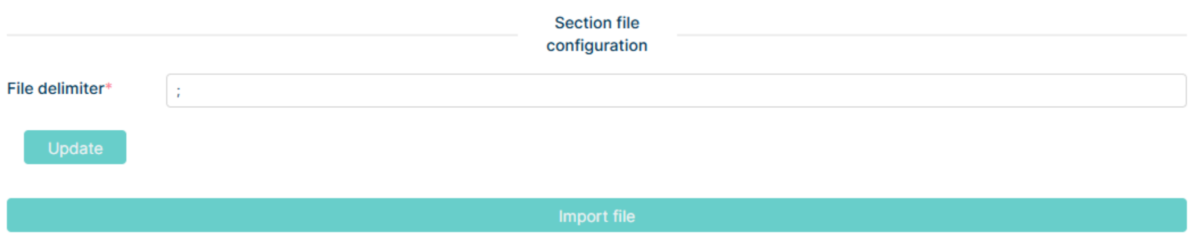
and the configuration with the CSV file:



This means: Take the data from the "AssetCategories" column in the CSV file, and if a value in this column matches "Computers," assign the asset from that row to the "Laptops" category in Mint Service Desk. In this way, we can assign multiple assets to multiple categories simultaneously.

- **Asset name column name** – Name of the CSV column that corresponds to the Name field of the asset in Mint Service Desk.
- **Description column name** – Name of the CSV column that corresponds to the Description field of the asset in Mint Service Desk.

Next section is **Section File Configuration**. Here we can define CSV file following settings:



- **Delimiter** – Default is a semicolon (;).
- **Import File Button** – Upload the CSV file for import.

The last section displays **Synchronization history**, including:

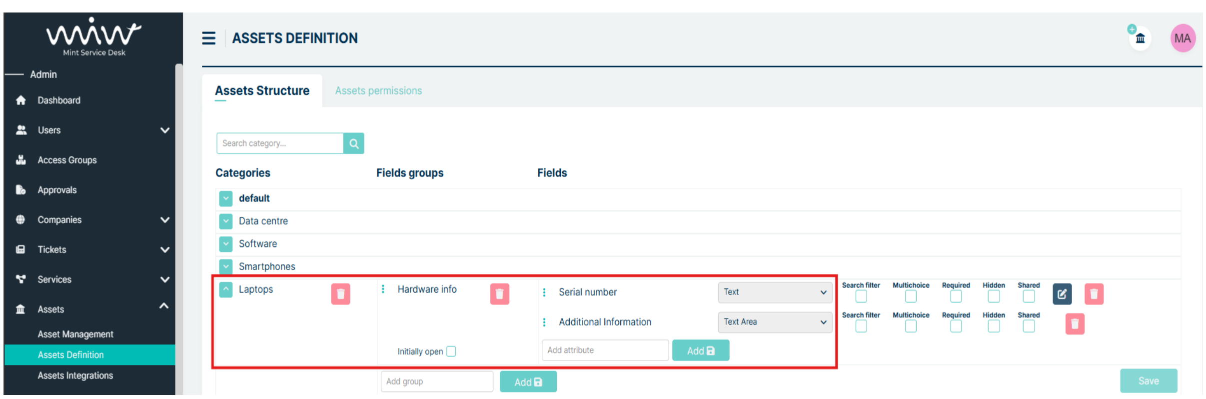
- **Start time**
- **Result**
- **Execution date**
- **Errors (if any)**

EXAMPLES

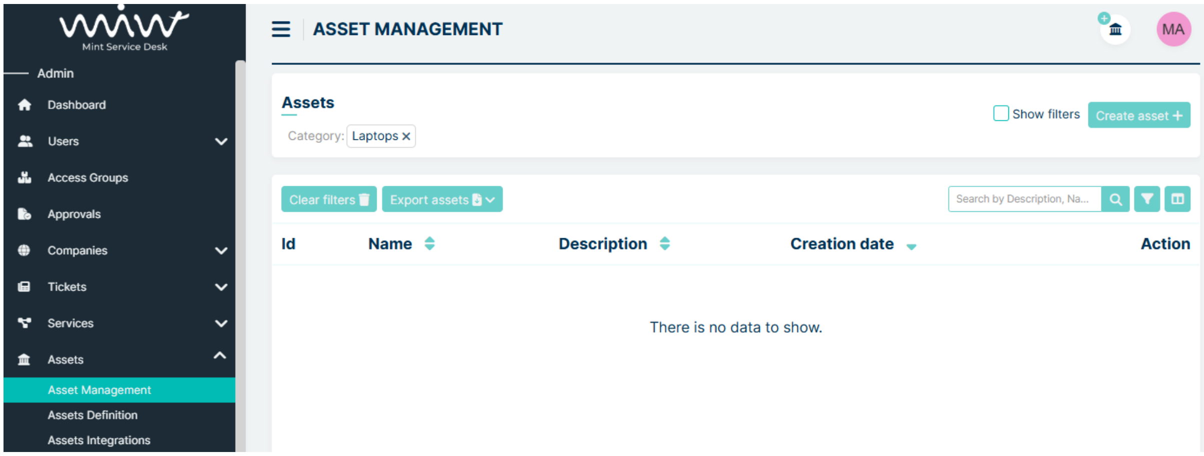
Below is an example of importing new assets and an example of updating assets.

Importing New Assets

In this example, an asset definition **Laptops** exist



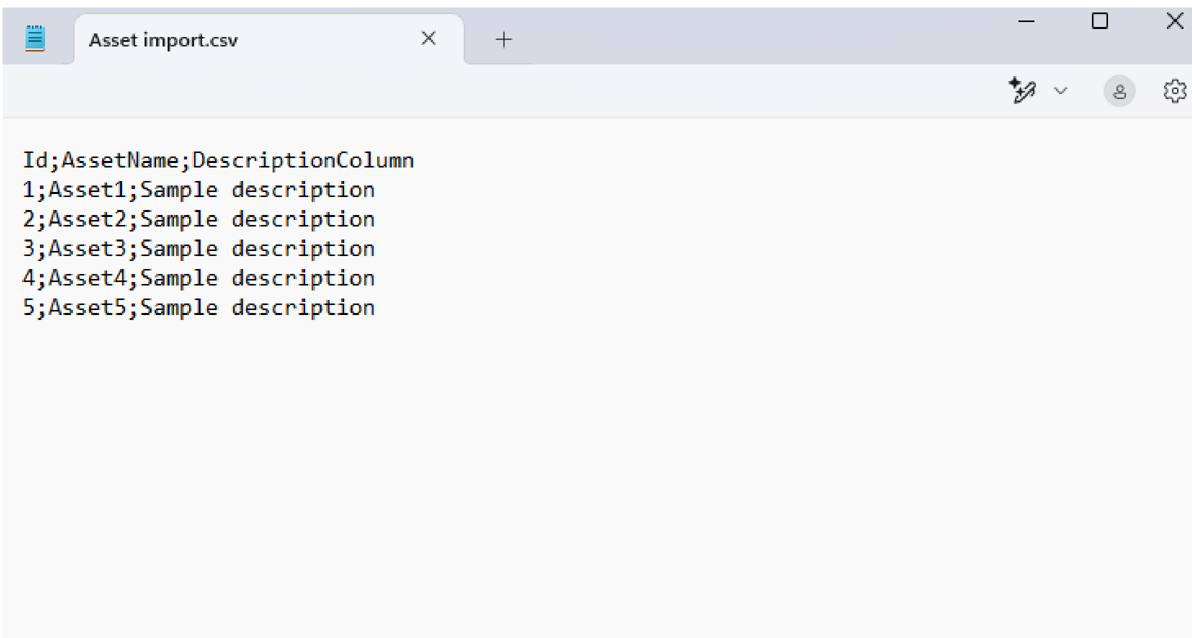
The asset database is initially empty



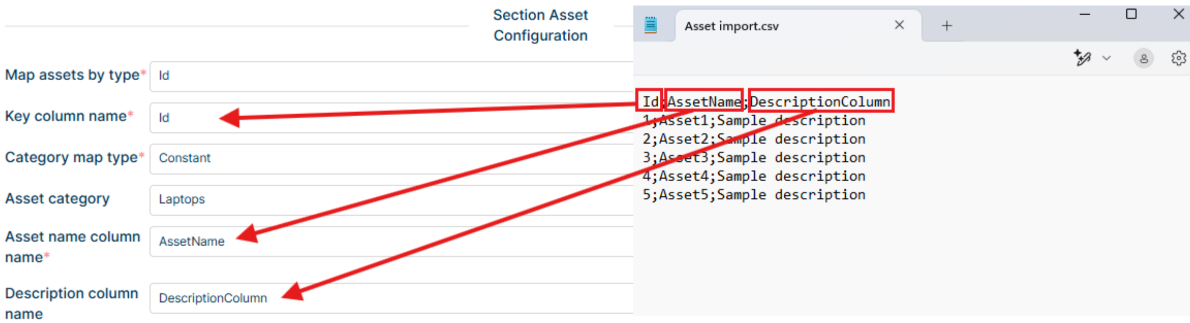
We want to import five assets with the following names: Asset1, Asset2, Asset3, Asset4, Asset5. Each asset should have text: *Sample description* in asset description field

Steps:

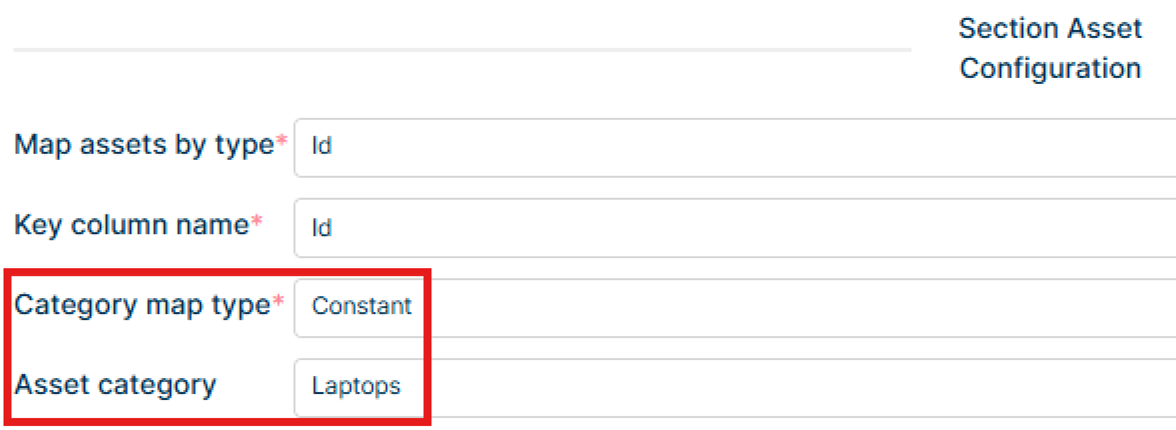
First we create a CSV file with the asset details



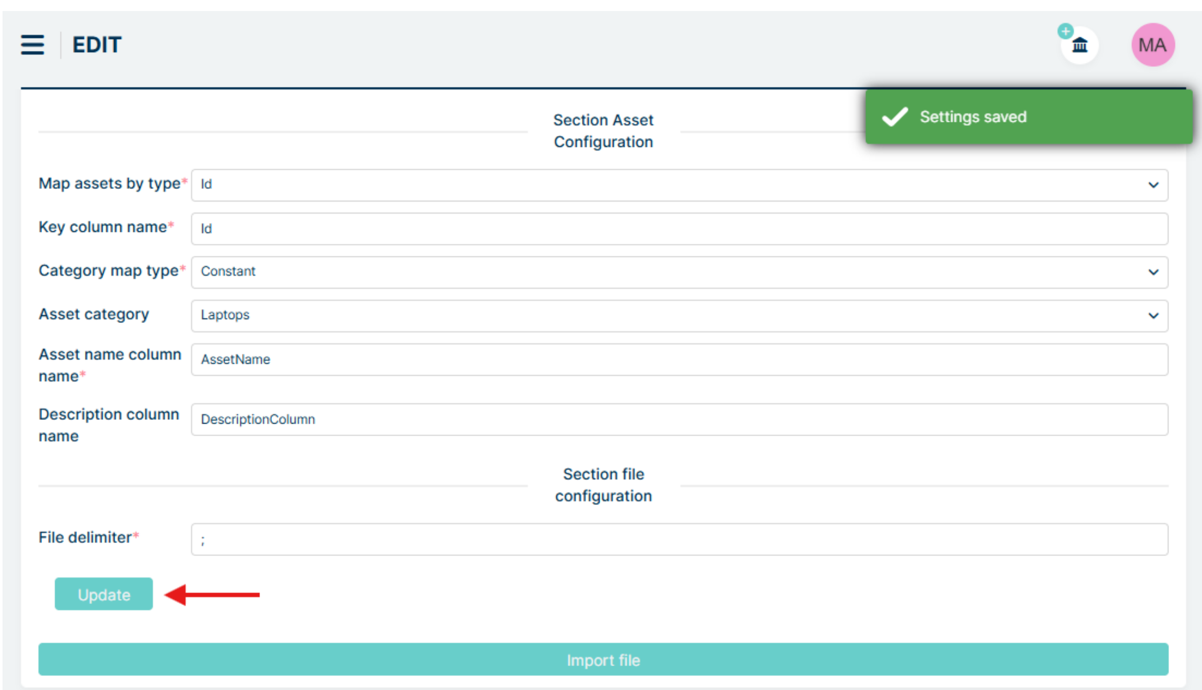
Next, we create a new import configuration in the Asset Integrations tab (as described in Configuration part) and fill in the Section Asset Configuration section.



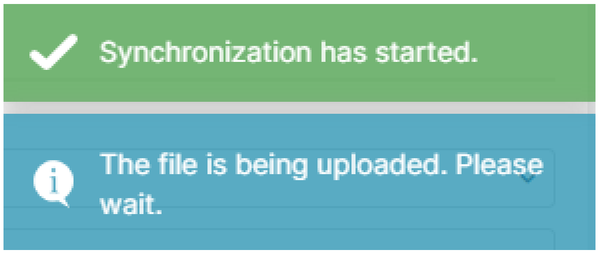
In **Category map type**, we select *Constant* and choose **Laptops** asset category



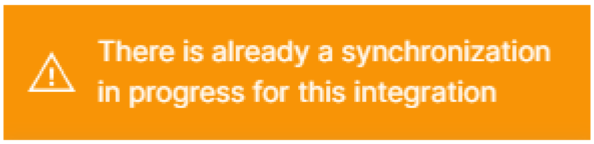
We leave the File delimiter field unchanged (semicolon) and then click Update – the data is saved.



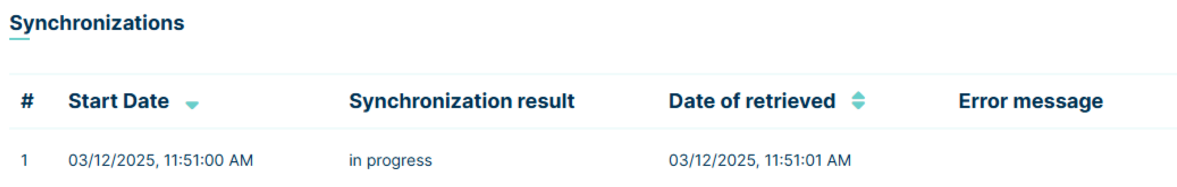
Now we import our file – click Import file and select the CSV file from the disk. As soon as it is uploaded, the following toast notifications appear in the top right corner, and the synchronization starts



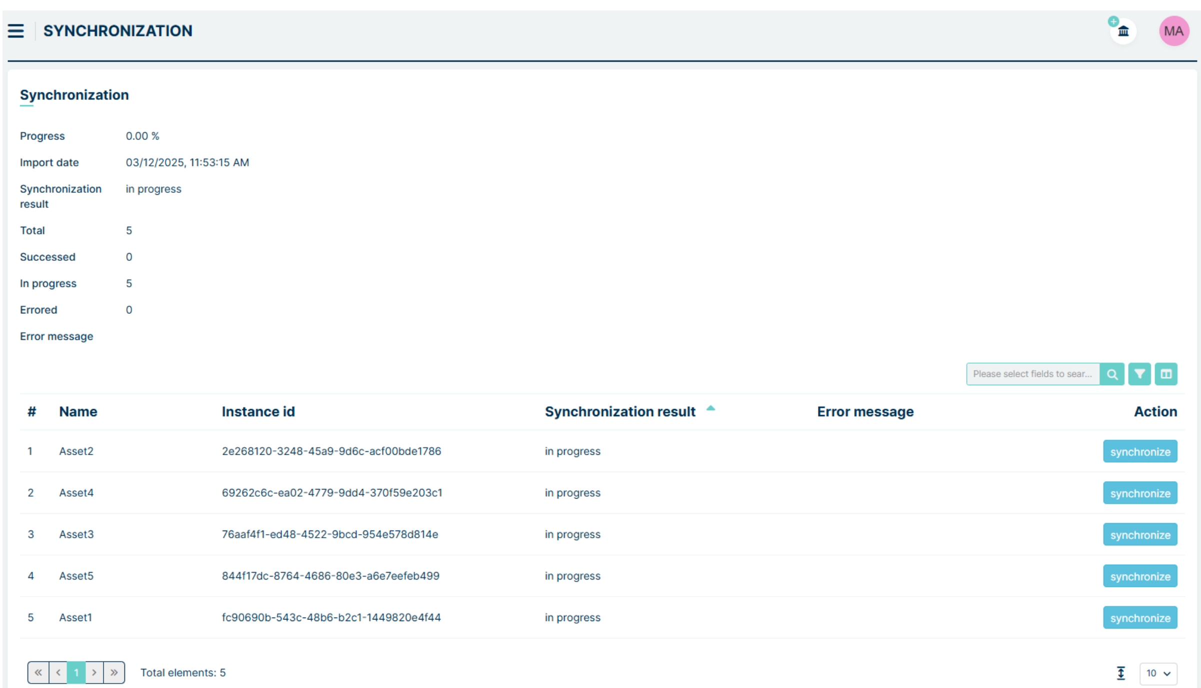
If another ongoing synchronization is already running in the background, we receive a notification:



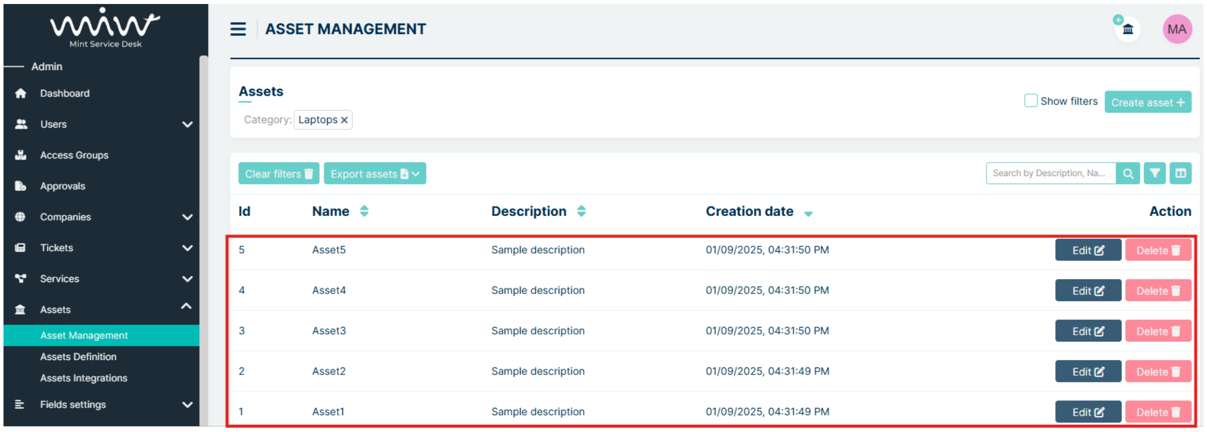
In the **Synchronizations** section, we can see our synchronization with the status **In Progress**.



We can click on it to enter its details and see progress:

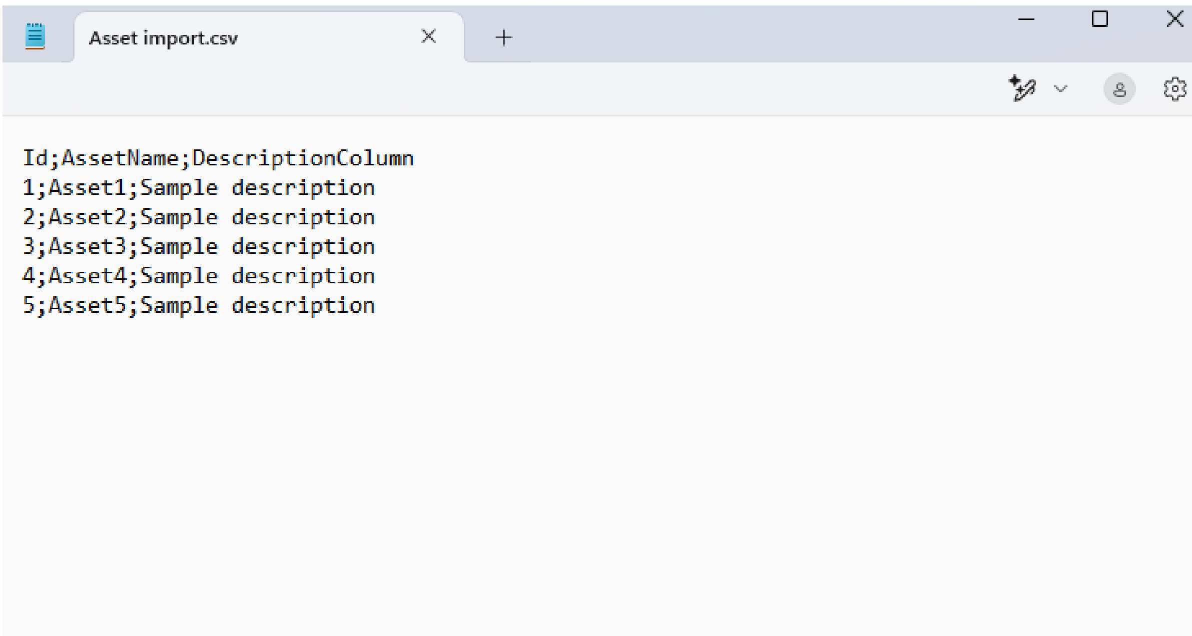


Once completed, the status changes to Success, and the assets are created in the system.



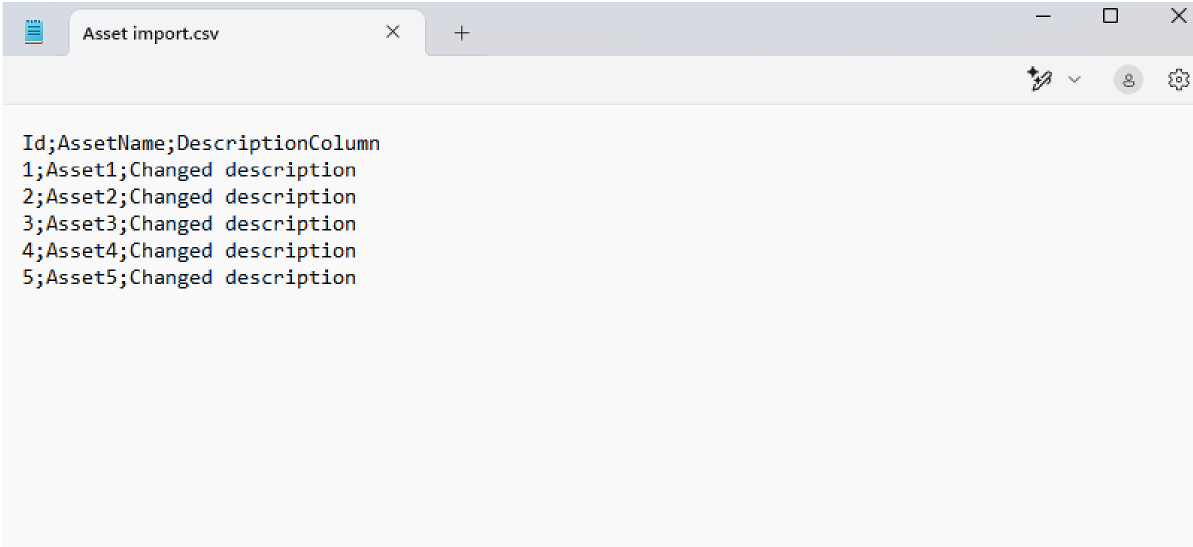
Modifying Existing Assets

After importing the assets, we want to update their names and descriptions. In the CSV file, before the update we have:

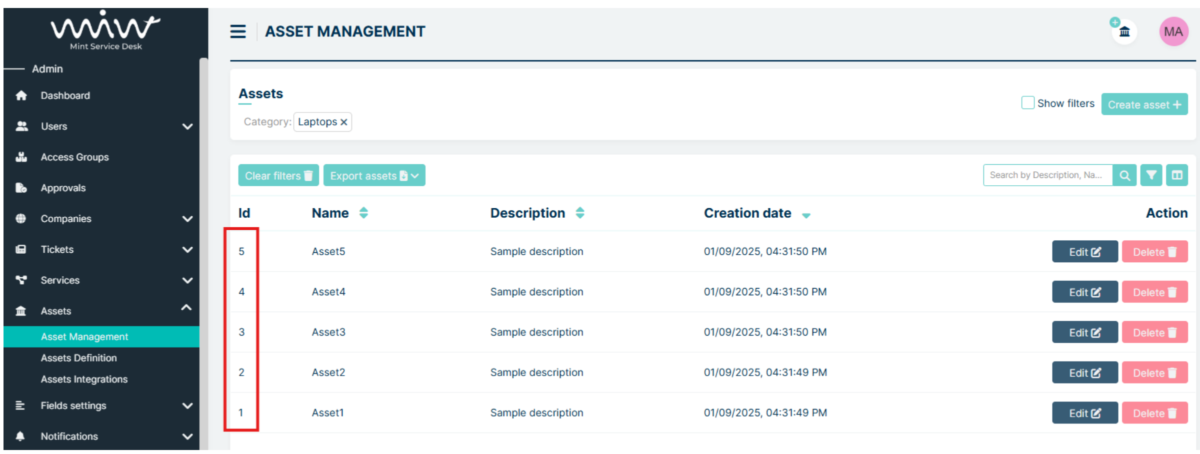



```
Id;AssetName;DescriptionColumn
1;Asset1;Sample description
2;Asset2;Sample description
3;Asset3;Sample description
4;Asset4;Sample description
5;Asset5;Sample description
```

After the update we want:

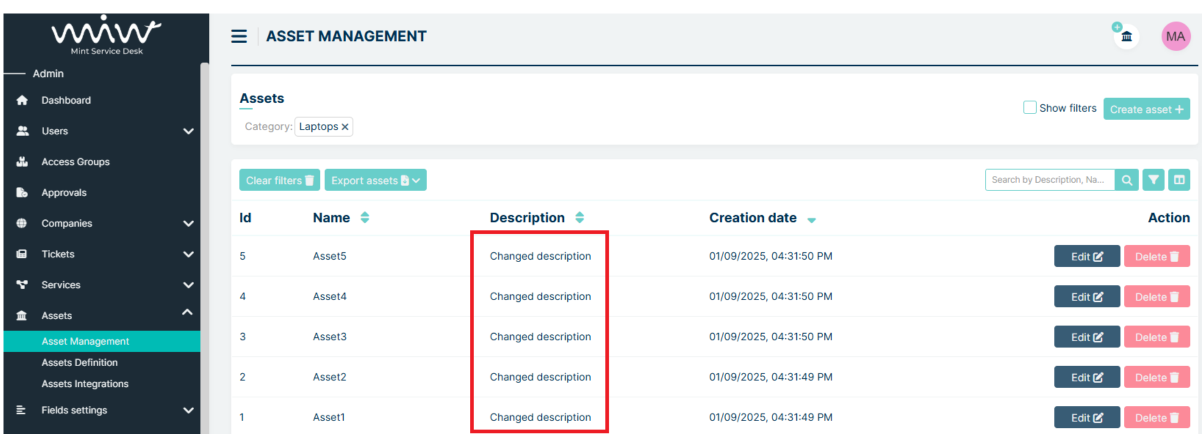


As the Primary key, we select the asset's ID. It is important that the asset ID in CSV matches the ID in Mint Service Desk.



If incorrect IDs are used, new assets will be created instead of updating existing ones.

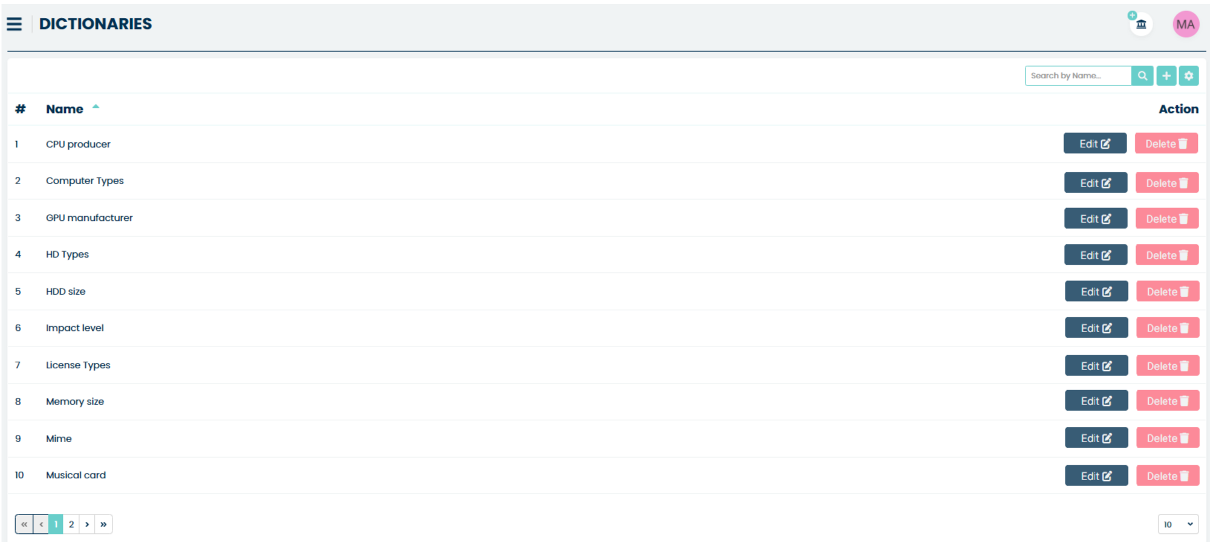
We import the updated file in the same way as described above in the instructions for importing new assets. After the import, we go to the Asset Management tab – the assets have been modified.



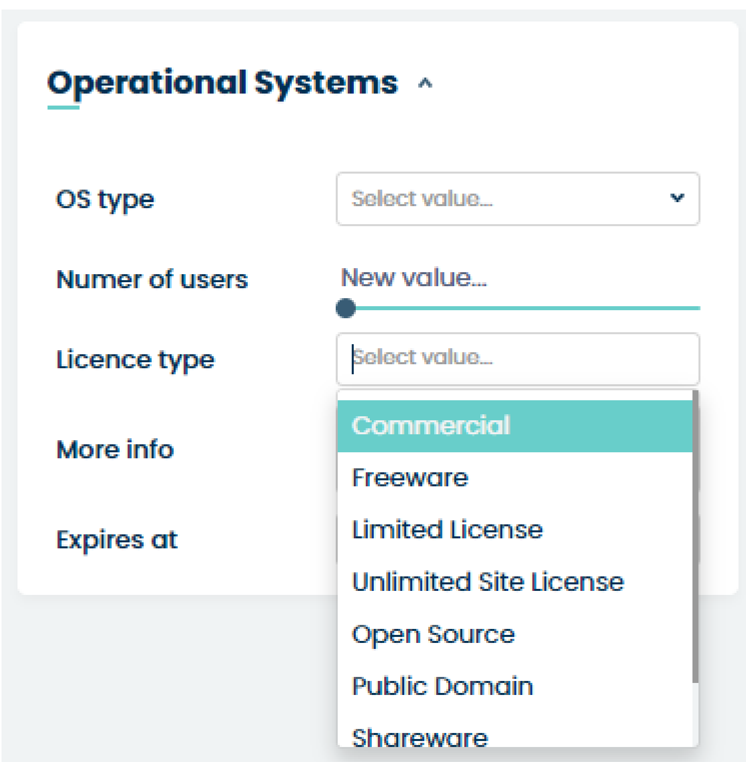
5.10 FIELDS SETTINGS

5.10.1 DICTIONARIES

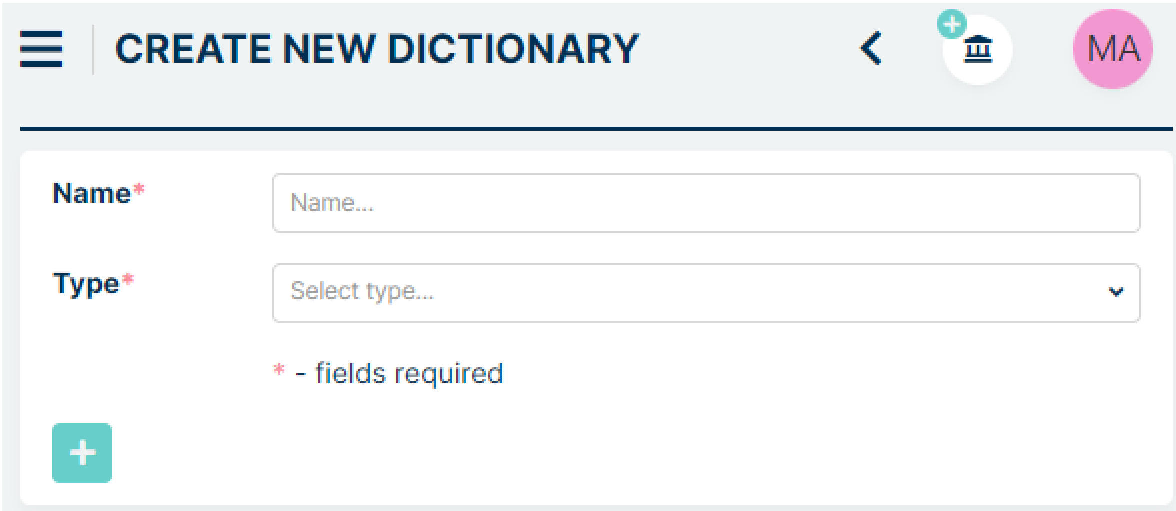
As was mentioned before, the definition of each ‘Dictionary’ attribute type along with its values, can be done here.



You can add/delete or modify Dictionaries and their values. Later such a dictionary will be presented for the users in the form of the dropdown list, where the user can select one (or more if ‘MultiChoice’ is selected in the attribute structure) value from that list.

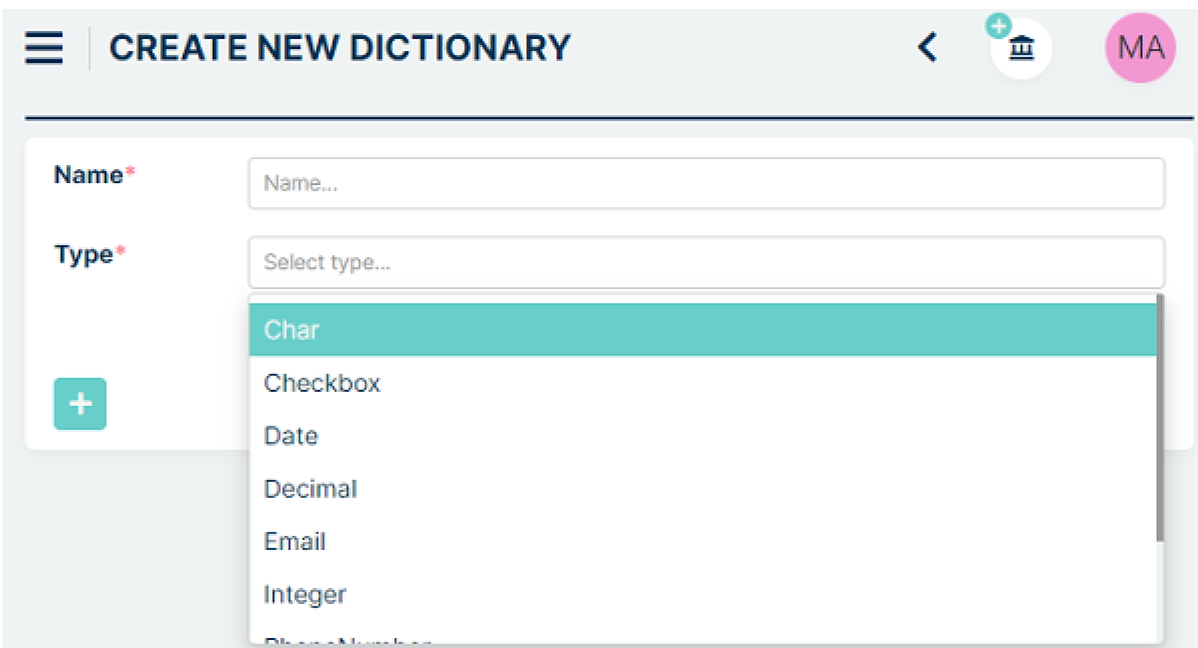


In order to create a new Dictionary, click the “Add new value”  button, located on the right side, and the creation screen will be displayed.

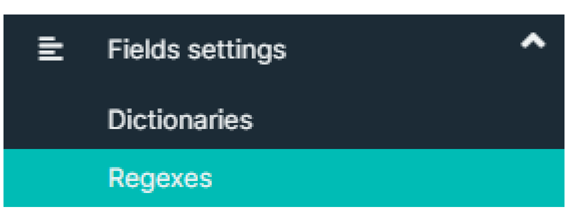


Now, type the name for your Dictionary e.g., "Computer Types" and then select one of the types available on the 'Select type…' dropdown list. In our example, we will choose the "Text" type.

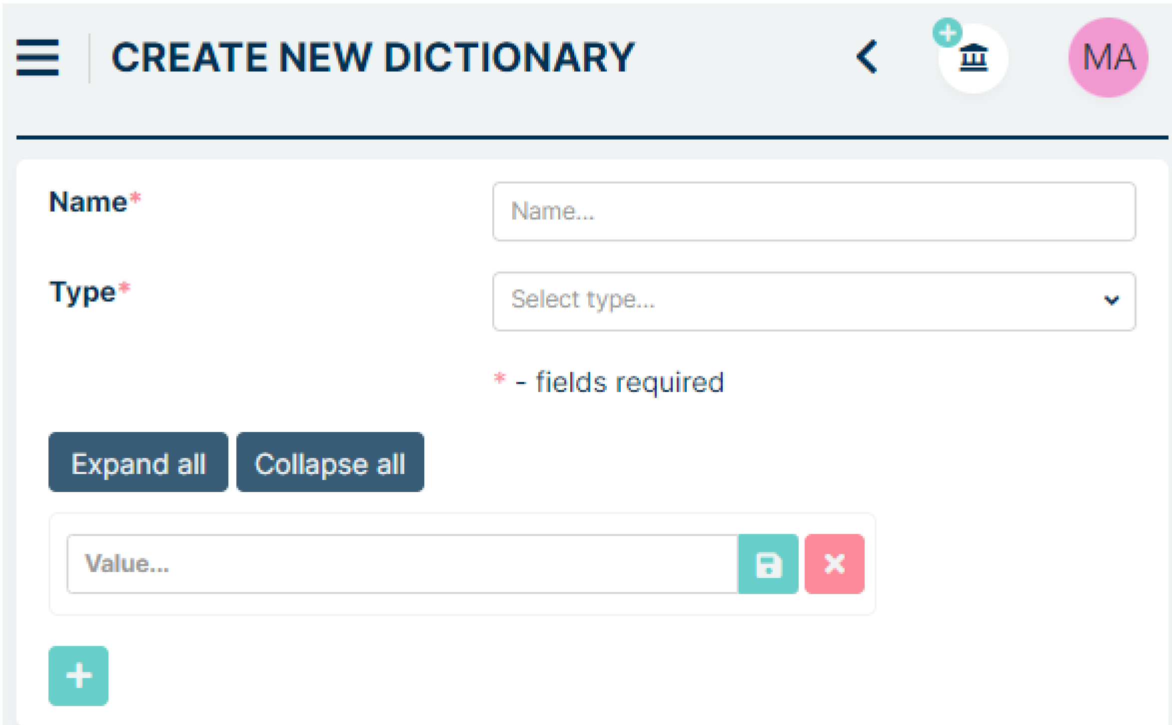
There are more dictionaries types that you can use: "Char", "Checkbox", "Date", "Decimal", "Email", "Integer", "Phone number", "Text" and "Time".



Remember that you can create your types under Fields settings > Regexes.

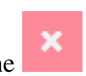


Once you to that, click on the  button and you will see that a view has been expanded and you can add the first value for your Dictionary.

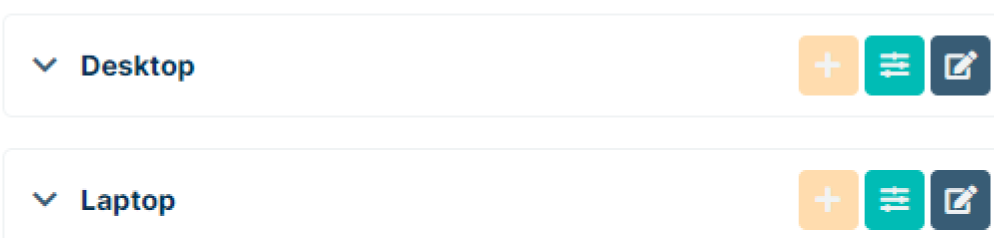


By pressing the  button you can add as many positions for your values as you want.

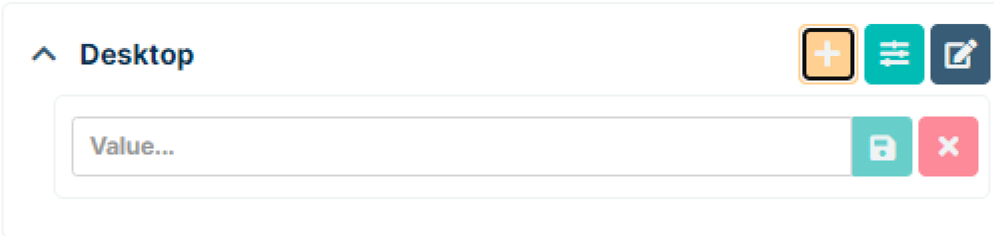
Type the name for each value in 'Value…' text field and press 'Enter' on your keyboard. You can use a  button for this as well.

If at any moment, while typing the name, you decide that you want to remove the whole position just press the  button.

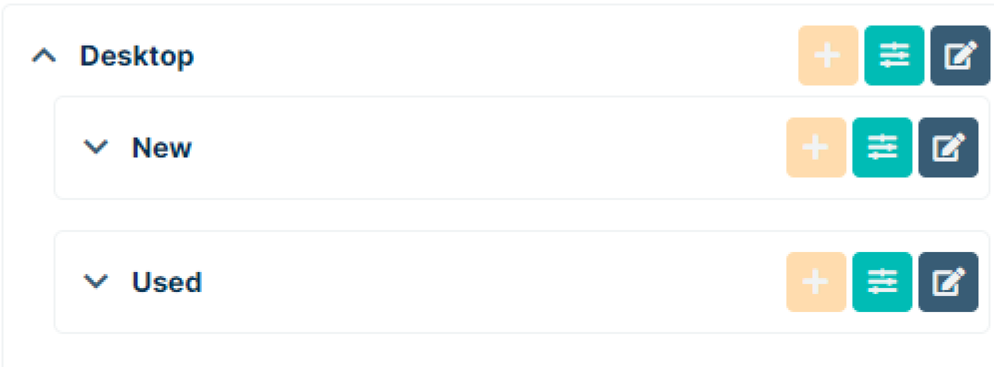
After you saved the names for the values you can do a couple of things. You can rename the Value by pressing the  edit button or delete the Value by pressing the  button.



What's more important is that you can create a 'Child value' for each Value. To do that press the button on the right side of Value's name. A new row will appear right below. You will notice that its position is not equal to the "parent" Value and it is moved a little bit to the right.



Here, as well, you can create as many 'Child values' as you want.



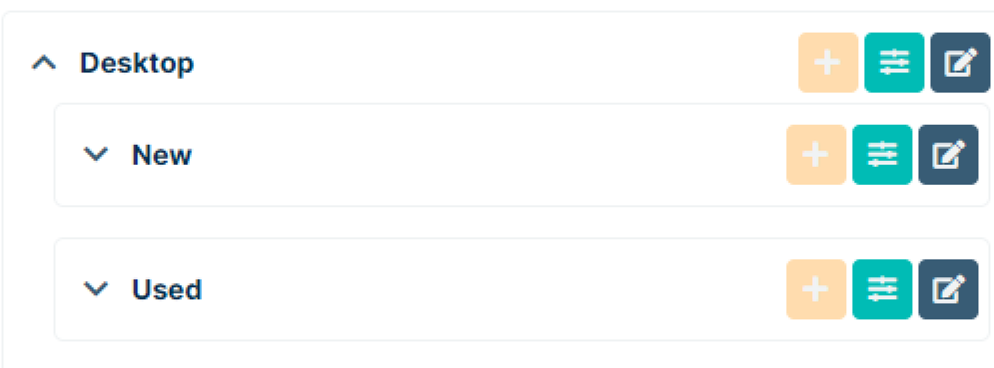
Once you're done you can save your Dictionary by clicking on 

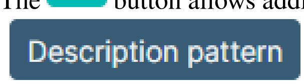
button to create your new Dictionary.

Every time you have a dictionary with 'child values' you can use some additional options to help you display them. Once you're either in 'Create new dictionary' or 'Edit dictionary' view you can use the Expand / Collapse buttons.

The first one will show everything, including 'Child values', while the second will hide them and you will only see 'Values'.

If you don't want to see 'Child values" of every Value that has them, you can expand and see 'Child values' of only one specific Value. Just press the > button in order to expand the list or the < button to hide it.

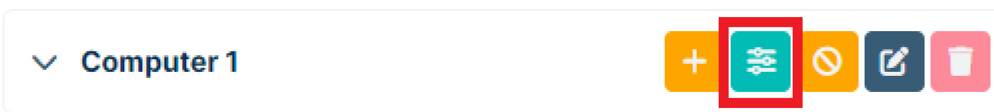


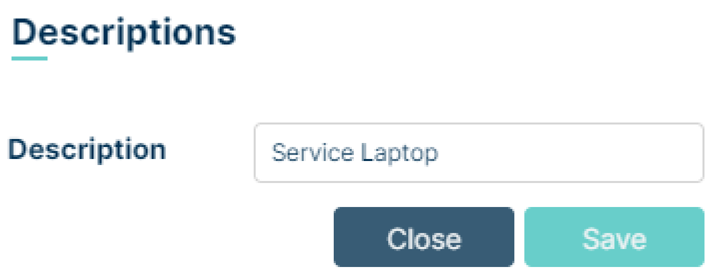
Let's take a look at the remaining buttons. The  button allows adding descriptions to each value in the dictionary depending on the configuration under the 

button. For example, we added a dictionary value named Computer 1, but we want to assign a different label to the name. First we configure settings under the

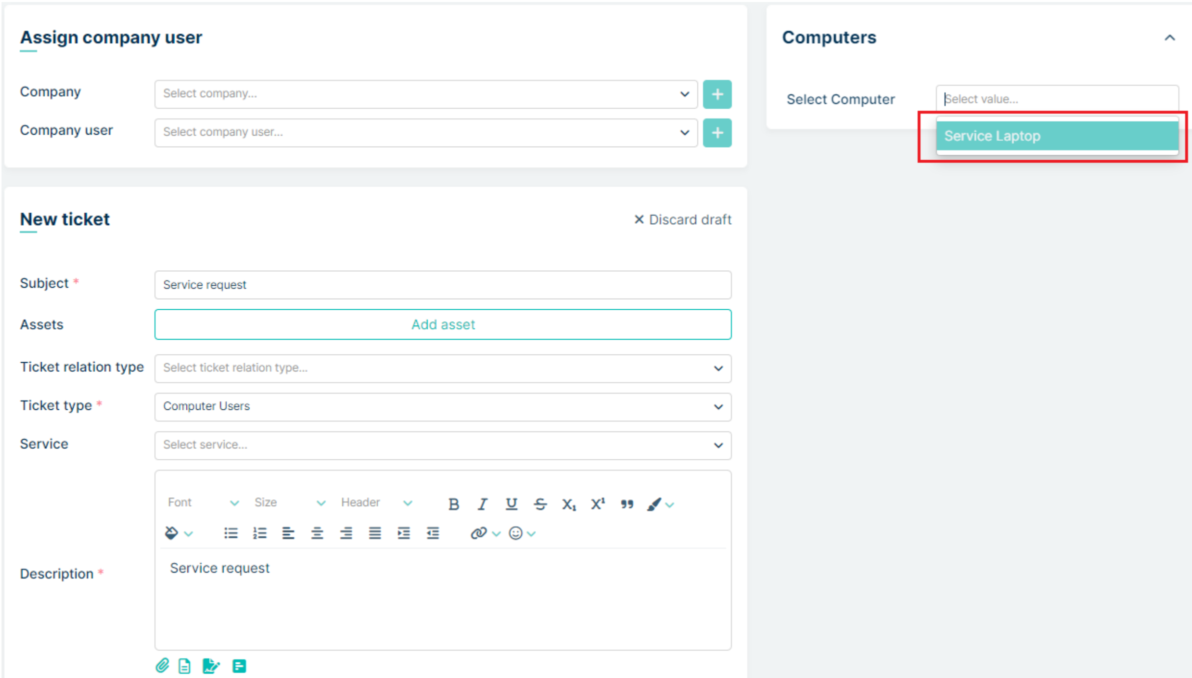
button and save:

Next we click the  button and enter the name that will be displayed in the ticket for this dictionary entry.

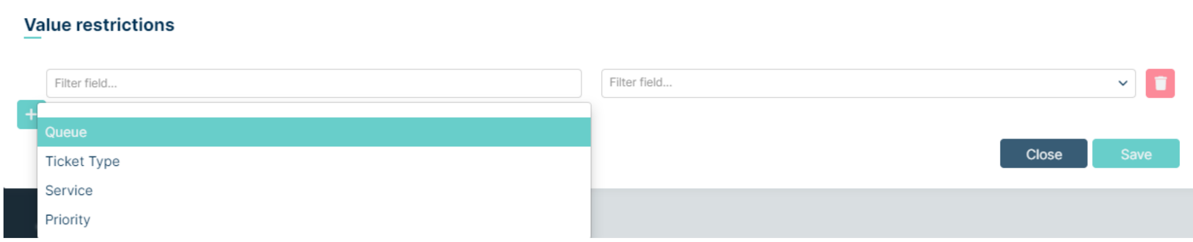




After saving the changes, the value is assigned. From now on, when selecting a value from the dictionary, the user (Agent and Client) will see the value with the label.



The  button allows specifying for which set parameters the dictionary value should be visible in the ticket. After clicking it, a new window opens with the possibility of adding values on the left, as well as Close and Save buttons on the right. Click the  button to add a new row.

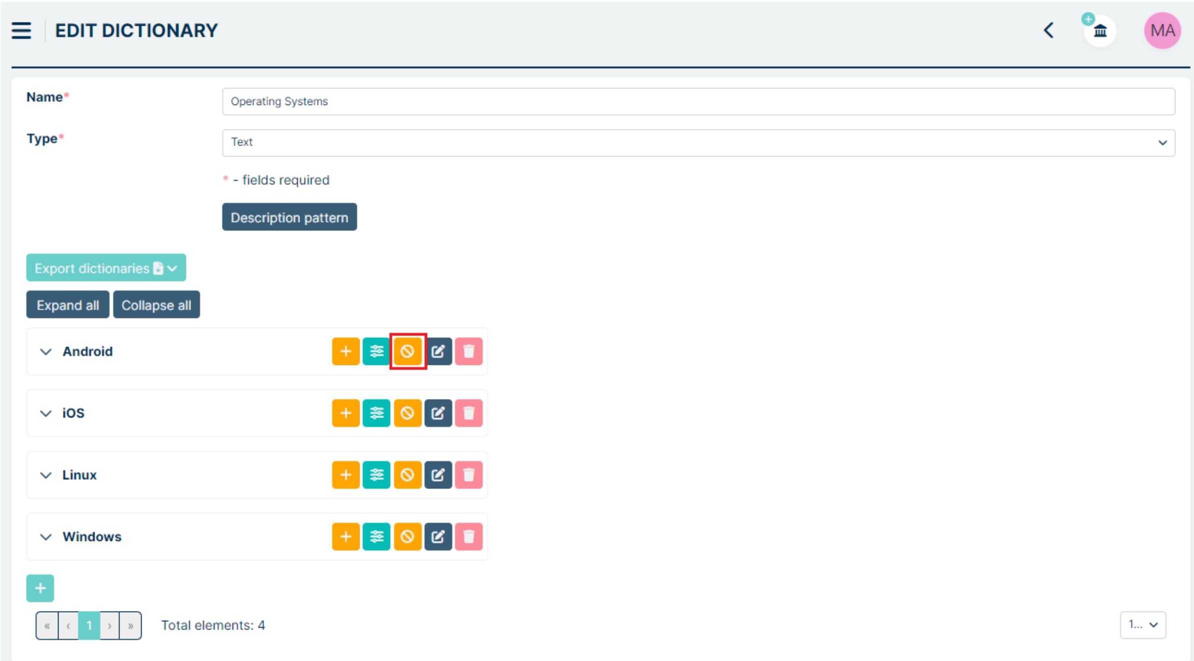


In the left part we choose from the available values:

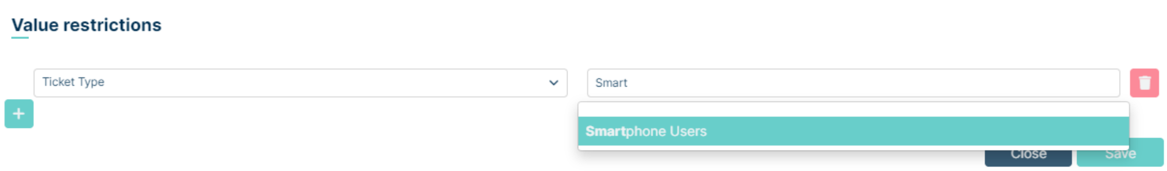
- Queue
- Ticket Type
- Service
- Priority

Selecting one of the above options allows you to choose a specific value assigned to this option in the field on the right side of the row, such as a specific queue, ticket type, priority, or service.

For example, from Operating Systems dictionaryselect the value: Android

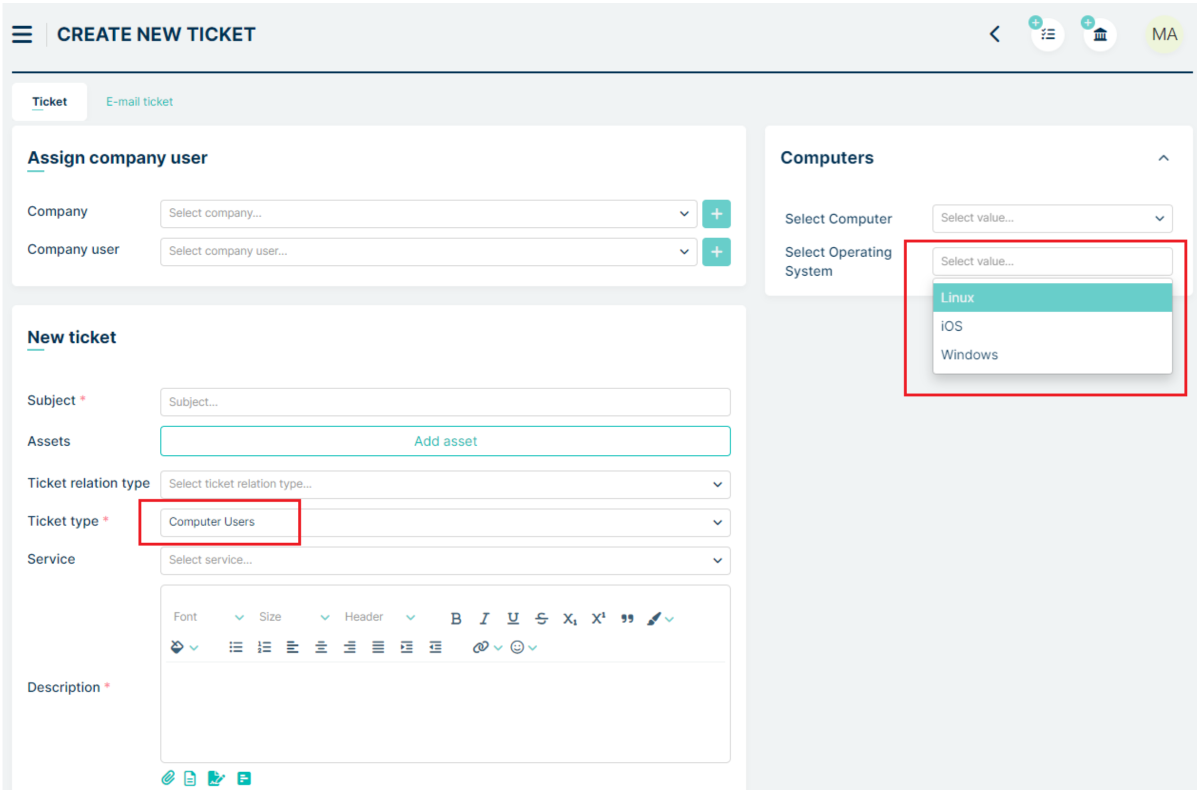


in  button choose the ticket type: Smartphone Users and save.

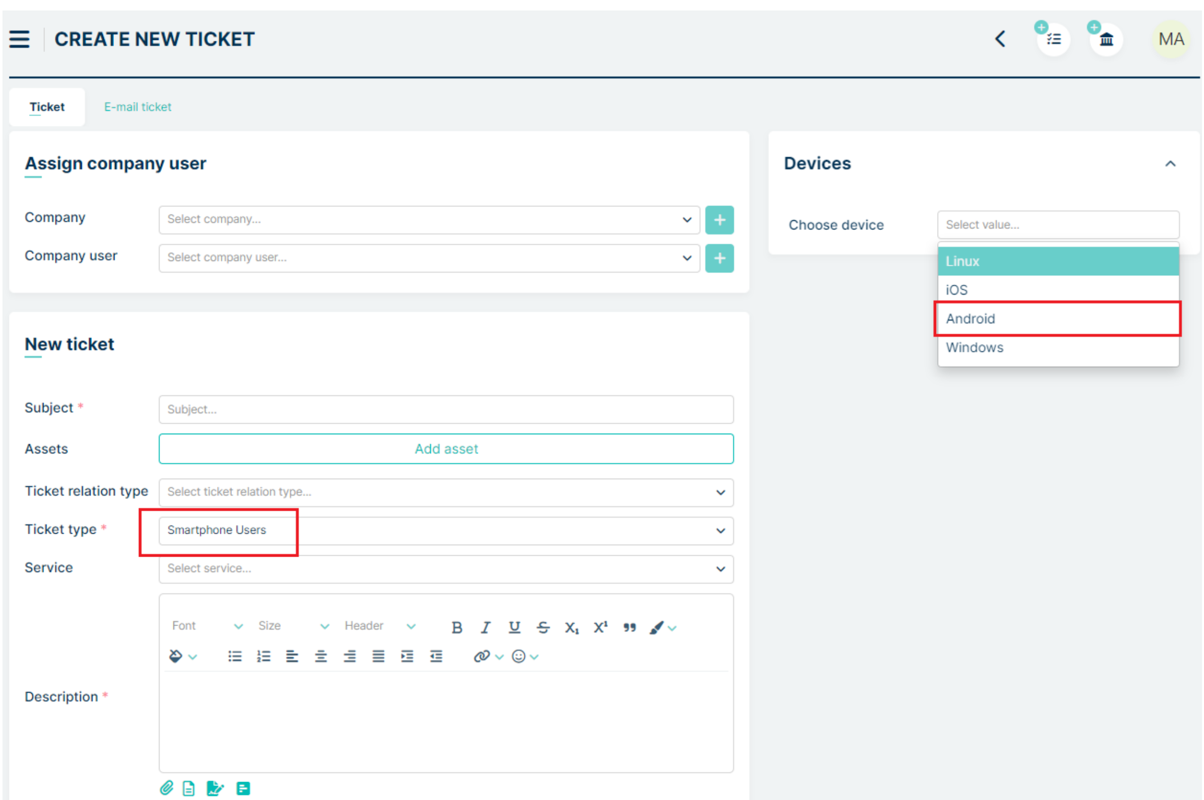


This means that the given dictionary value will be visible only for the ticket type: Smartphone Users.

Let's check this. In the image below, Agent creates a ticket with the ticket type: Computer Users and uses the dictionary: Operating Systems assigned to the custom field: Select Operating System. The value Android does not appear in the list of selectable values.



In the next image, Agent creates the same ticket but with the ticket type: Smartphone Users. This ticket type uses the same dictionary. As we can see, the value: Android appears in the list of selectable values.

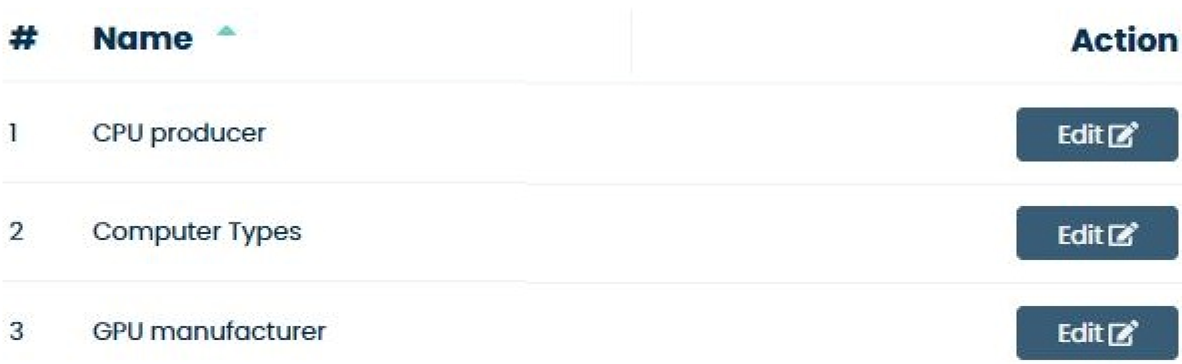


Remember, not selecting any parameters under the discussed functionality means that the values should always be visible (depending on the permissions assigned to the custom field).

We can add more parameters if needed.

Now, let's go back to the main Dictionary list. Whenever you decide to change anything in any of the dictionaries, just click the 

button located on the right side ('Action' column) of each dictionary on the list.

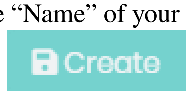


5.10.2 REGEXES

Regexes = Regular expressions. They are very useful if you want to limit the values stored in a field in a way that only some specific information can be added. For example, if you have an "Integer" attribute then only numbers can be stored, or an "Email" attribute can only store a proper email address account.

By default, MINT Service Desk has some "Regexes" already defined. However, if you like, you can always create new ones.

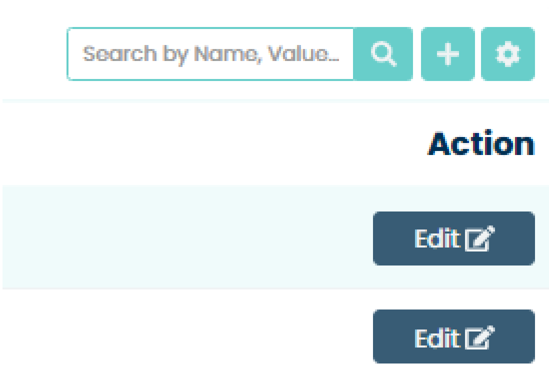
Click on the "Add new value"  button, located on the right side, next to the search field and you will be moved to the "Create New Regex" screen.

Now, just type the "Name" of your regex and the allowed set of "Values". You can also check the option "Is hidden" if needed. Press the 

button and the new regex will appear on the list of available ones.

If, on the other hand, you would like to make some changes in already existing Regex, just click the 

button located on the right side of the main view, in the 'Action' column.

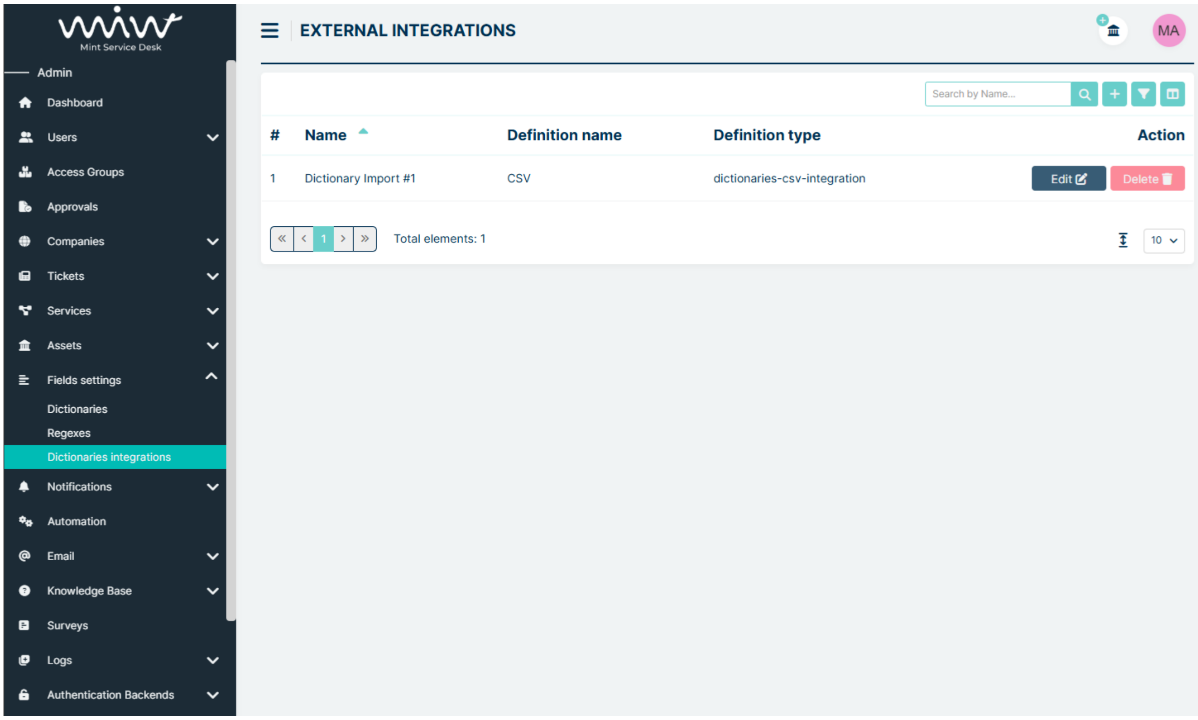


5.10.3 DICTIONARIES INTEGRATIONS

Dictionaries integration facilitates the swift import of both simple and advanced dictionaries (with patterns) from a CSV file. This saves the user time that would otherwise be spent on manually entering similar data.

The process requires that a created dictionary exists in the system. To create a new dictionary, go to Field Settings -> Dictionaries.

The integration process starts by navigating to the Field Settings tab and then to the Dictionary Integration submenu. The main view presents a configuration table with the following columns:



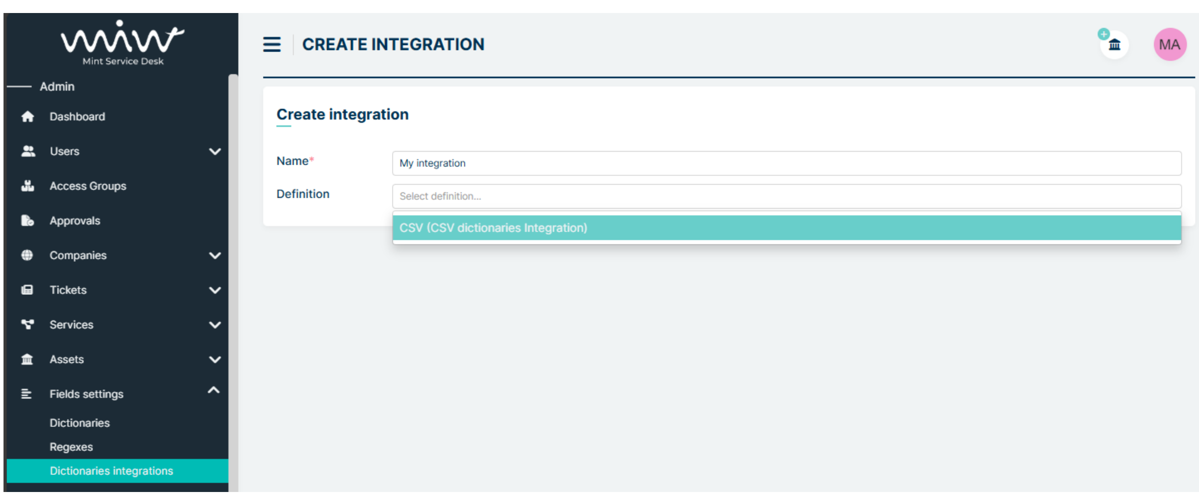
- **Name** - the name of the configuration
- **Definition Name** - a short name for the type of configuration selected from the list during creation
- **Definition Type** - a description of the selected type of configuration
- **Action** - a column with 

 and 

 buttons

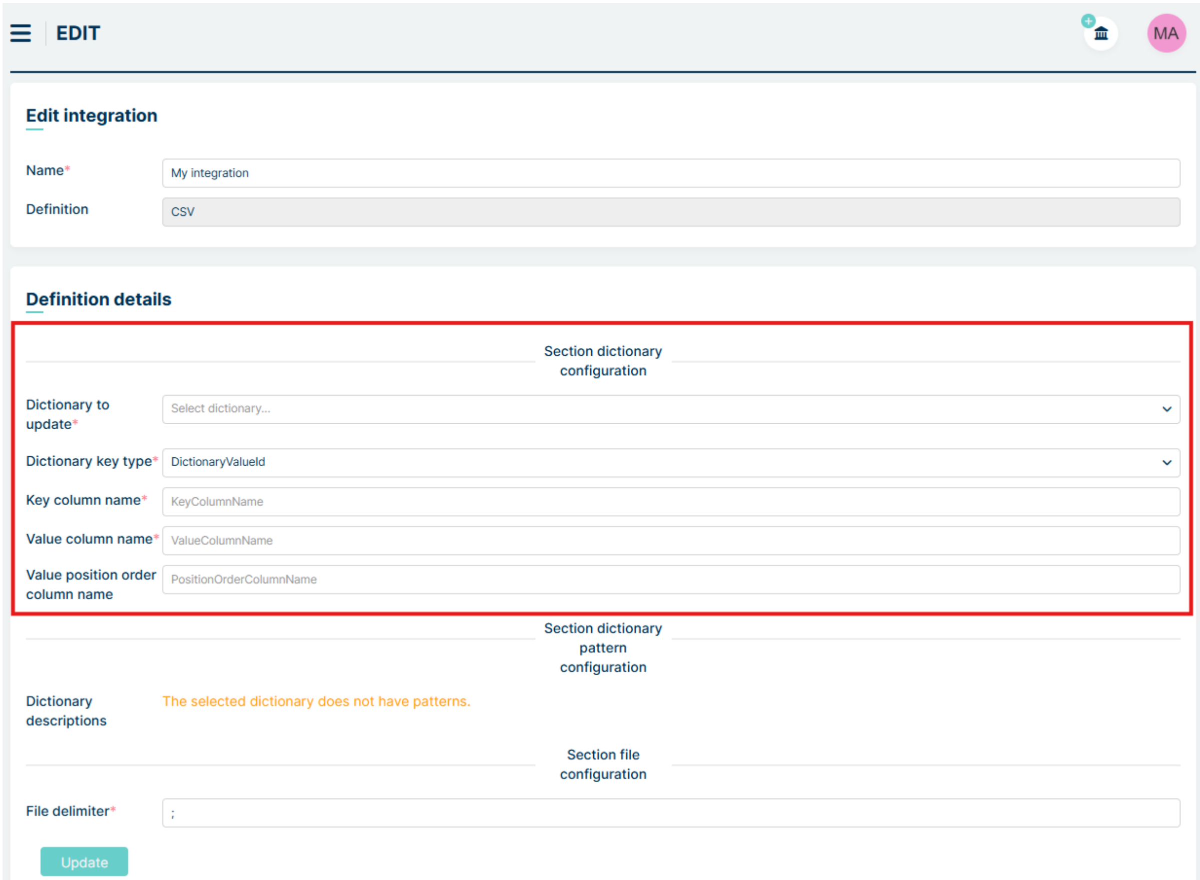
To create a new configuration, click the  button in the upper right corner of the page.

This opens the Create Integration page, where we name our configuration in the Name field and select the type of configuration in the Definition field.



After completing and saving the data, we are redirected to the configuration settings.

We start with **Section dictionary configuration**.

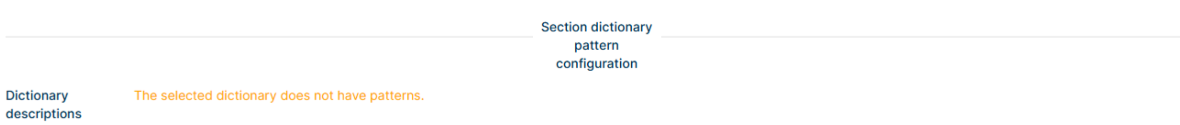


The first step is to select a dictionary - in the Dictionary to update field, we select an existing dictionary in the system that we want to update.

After selecting the dictionary, we proceed to the following fields:

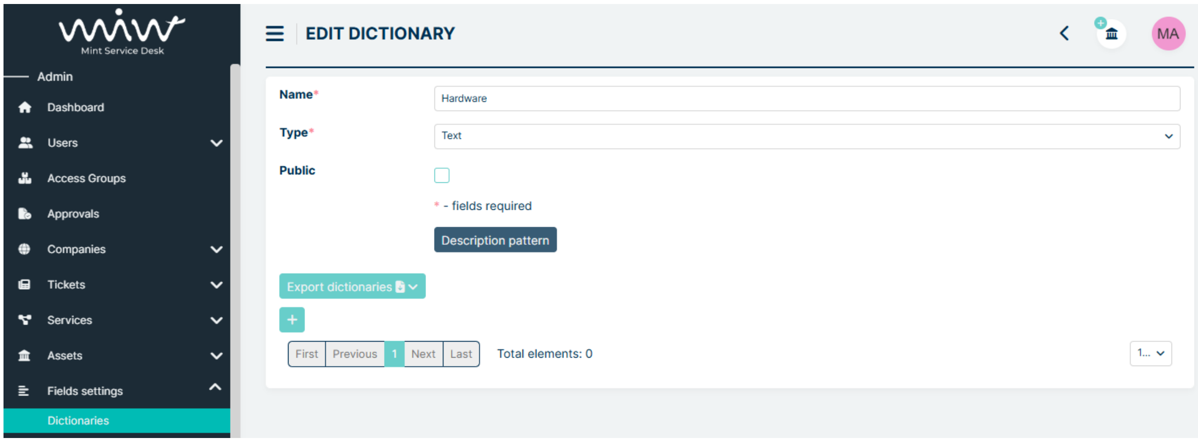
- **Dictionary key type**: Here, we select the database column that will be the primary key for the imported data (the database column used to identify whether values already exist). The available options are: DictionaryValueId, Value, or Pattern.
- **Key column name**: Here, we enter the name of the key column from the file. The data from this column will correspond to the database column selected in the Dictionary key type field.
- **Value column name**: Here, we enter the name of the column from the file whose data will correspond to the Value column in the database.
- **Value position order column name**: Here, we enter the name of the column from the file whose data will correspond to the PositionOrder column in the database.

If the dictionary does not have patterns, the message 'The selected dictionary does not have patterns' will appear in the 'Section Dictionary Pattern Configuration'.



Let's try to configure parameters and make integration.

In Mint Service Desk there is a **HARDWARE** dictionary without any entries.



We would like to import three entries to our dictionary: *computer, laptop, smartphone* and we want to have them to be in this exact order. We know that the Value column is the key and that values in it will not be duplicated.

First we need to create an appropriate CSV file. In the first row, we define the names:

- **Key column name**: the name of the key column. The data in this column will refer to the database column selected in the **Dictionary key type** field.
- **Value column name**: the name of a column whose data will refer to the 'value' column in the database.
- **Value Position Order Column Name**: the name of the column whose data will refer to the 'PositionOrder' column in the database.

The names must be separated by a defined delimiter. In this example, we use a semicolon.

A sample first row of the file would be:

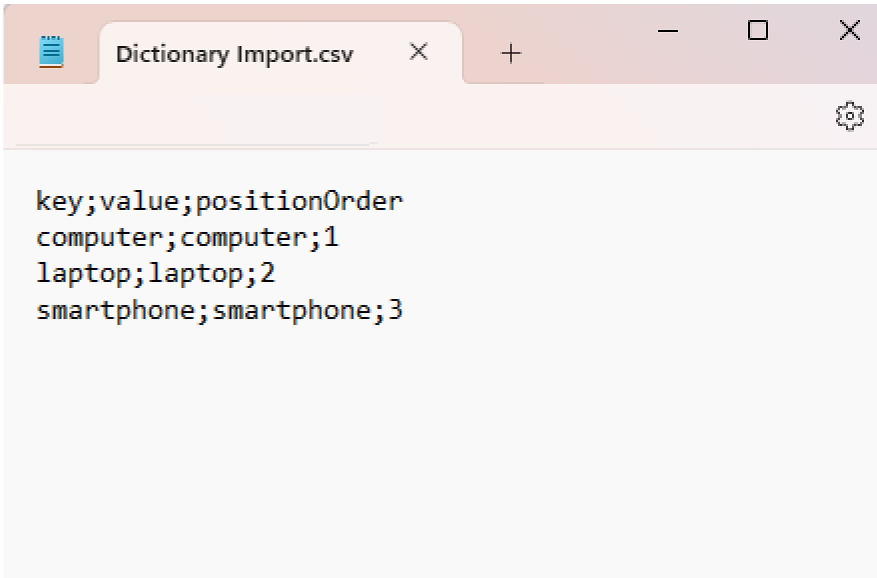
key;value;positionOrder

In the second and subsequent rows, we enter the data that will be placed in the columns defined in the first line.

For the **HARDWARE** dictionary, the file would look as follows:

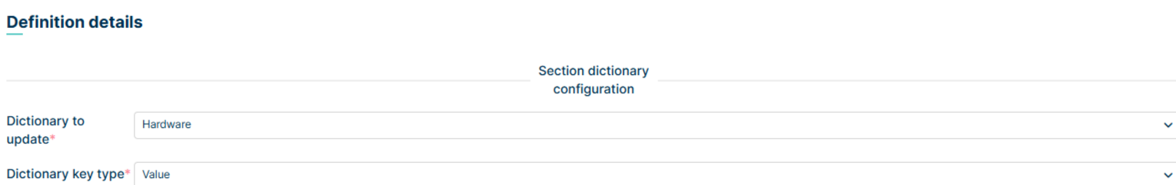
- Row 1: key;value;positionOrder
- Row 2: computer;computer;1
- Row 3: laptop;laptop;2
- Row 4: smartphone;smartphone;3

The sample file should look like below:



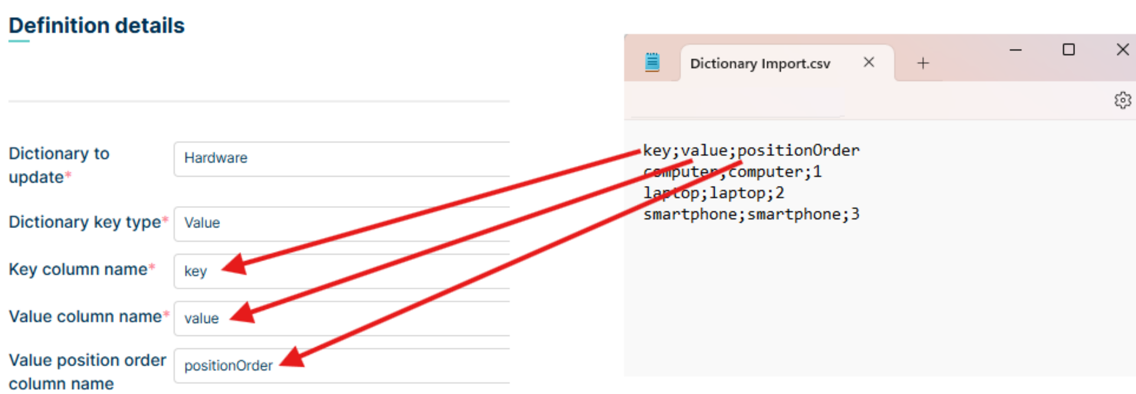
Once the file is prepared, we proceed to the dictionary configuration section and select:

- Dictionary key type - the column serving as the key for our dictionary (we select Value because we know these values will be unique and not duplicated).

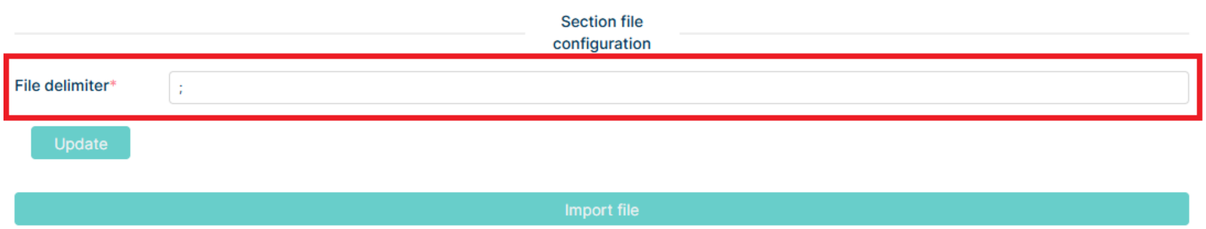


Then we fill in the names according to the first row:

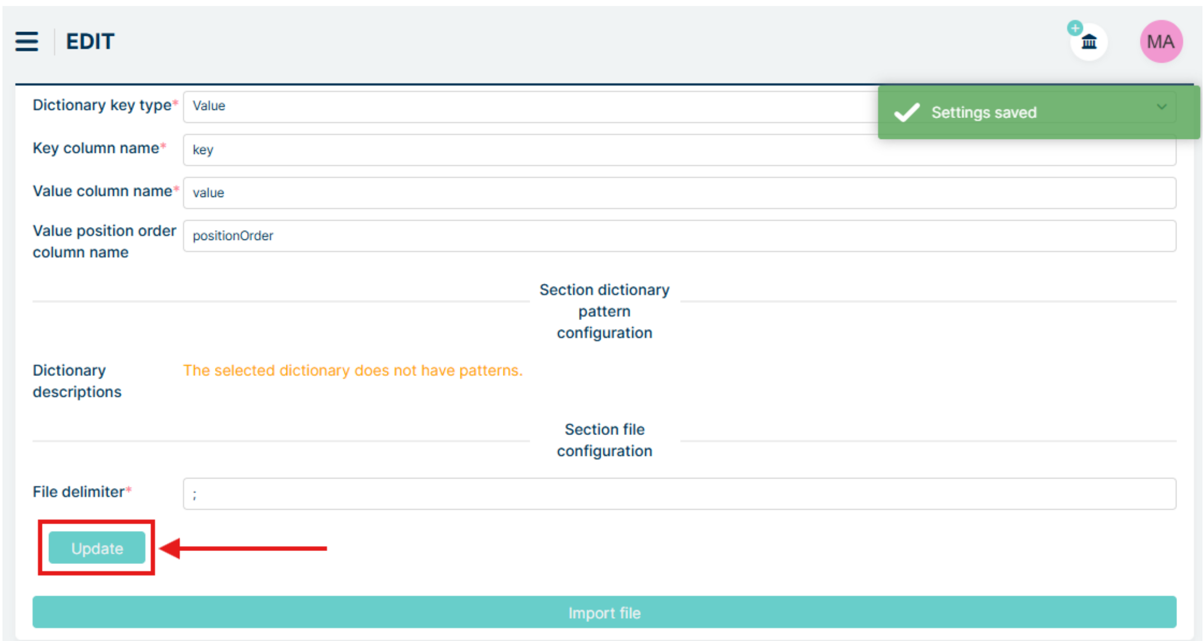
- Key column name: key
- Value column name: value
- Value position order column name: positionOrder



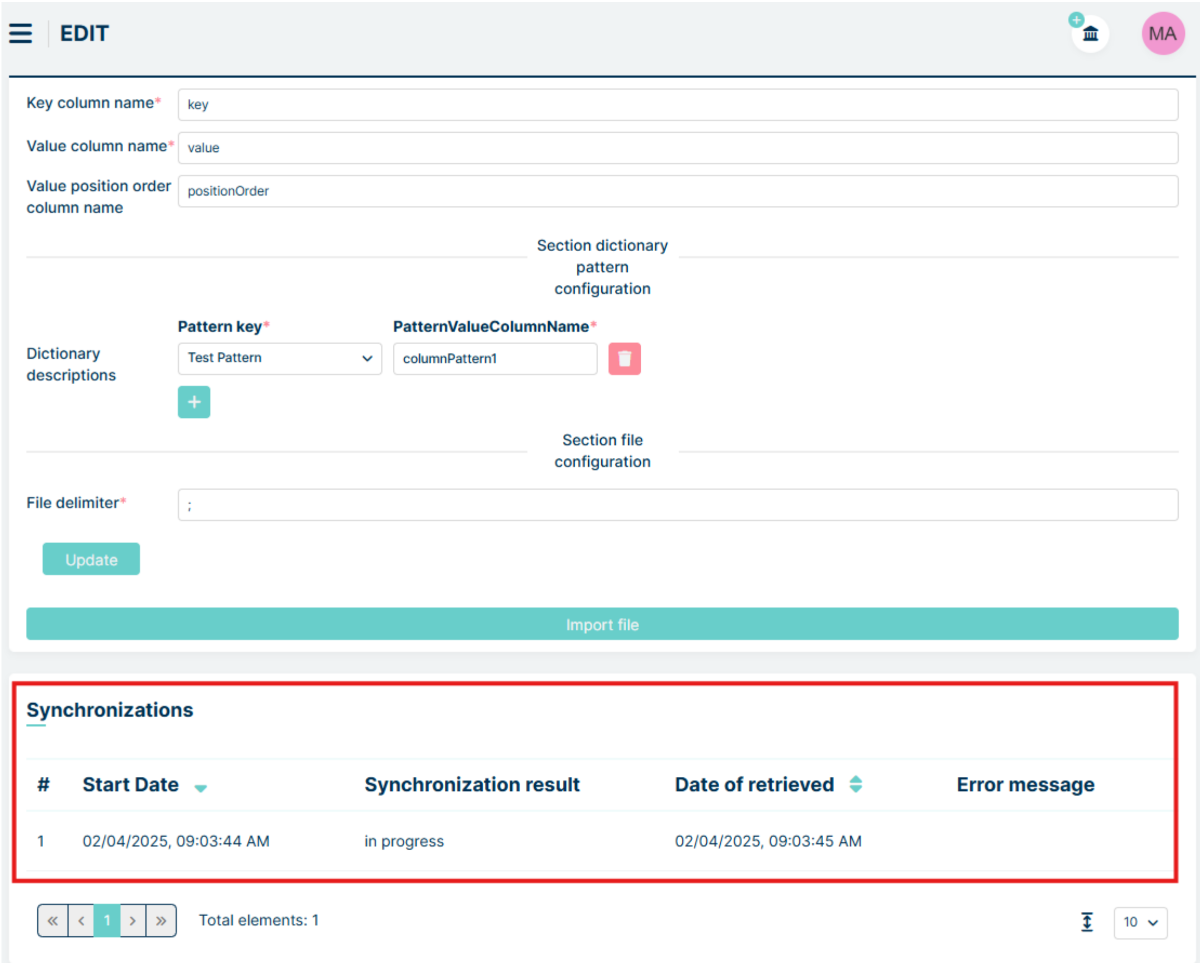
In the File delimiter section, we set the CSV data separator (by default, this is a semicolon).



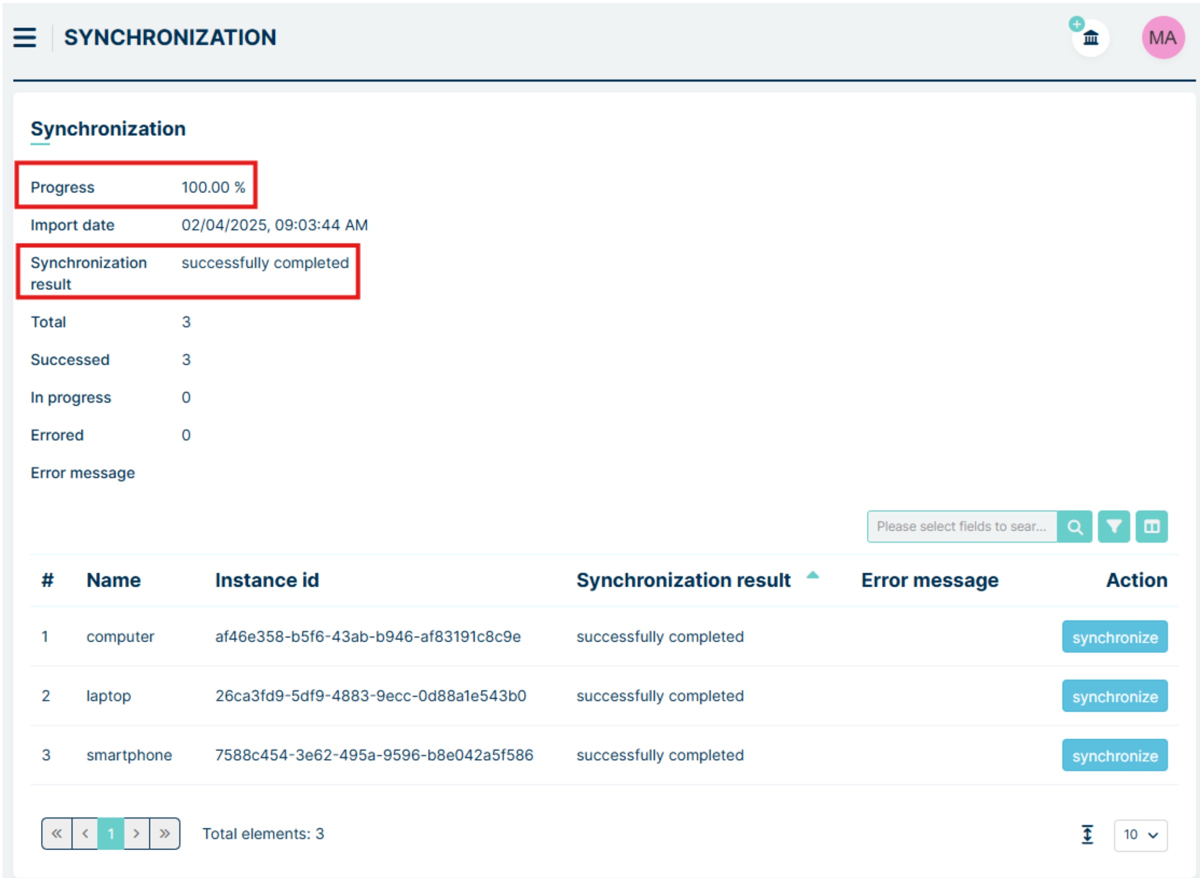
After completing the above steps, we click the Update button - the configuration data is updated.



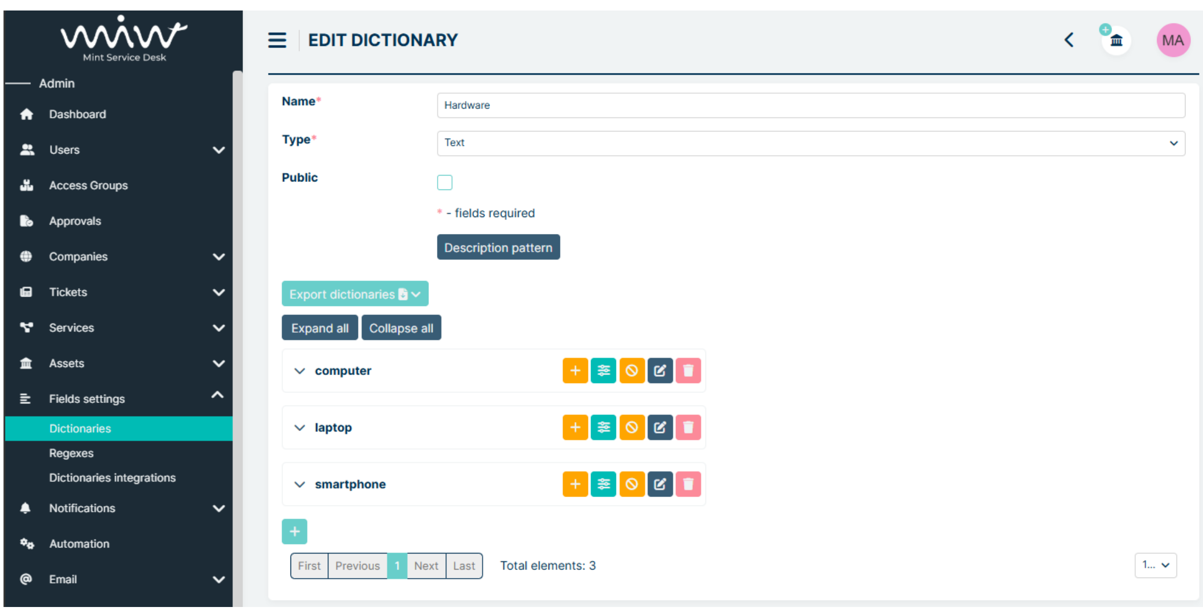
The next step in the process is to import data from the file. Click the 'Select file' button, attach the relevant file and the synchronization will start automatically.



This action starts the process of retrieving dictionary values, which you can track in real time. Clicking on a selected synchronization takes you to the details, where you can also view the retrieval process and any potential errors.

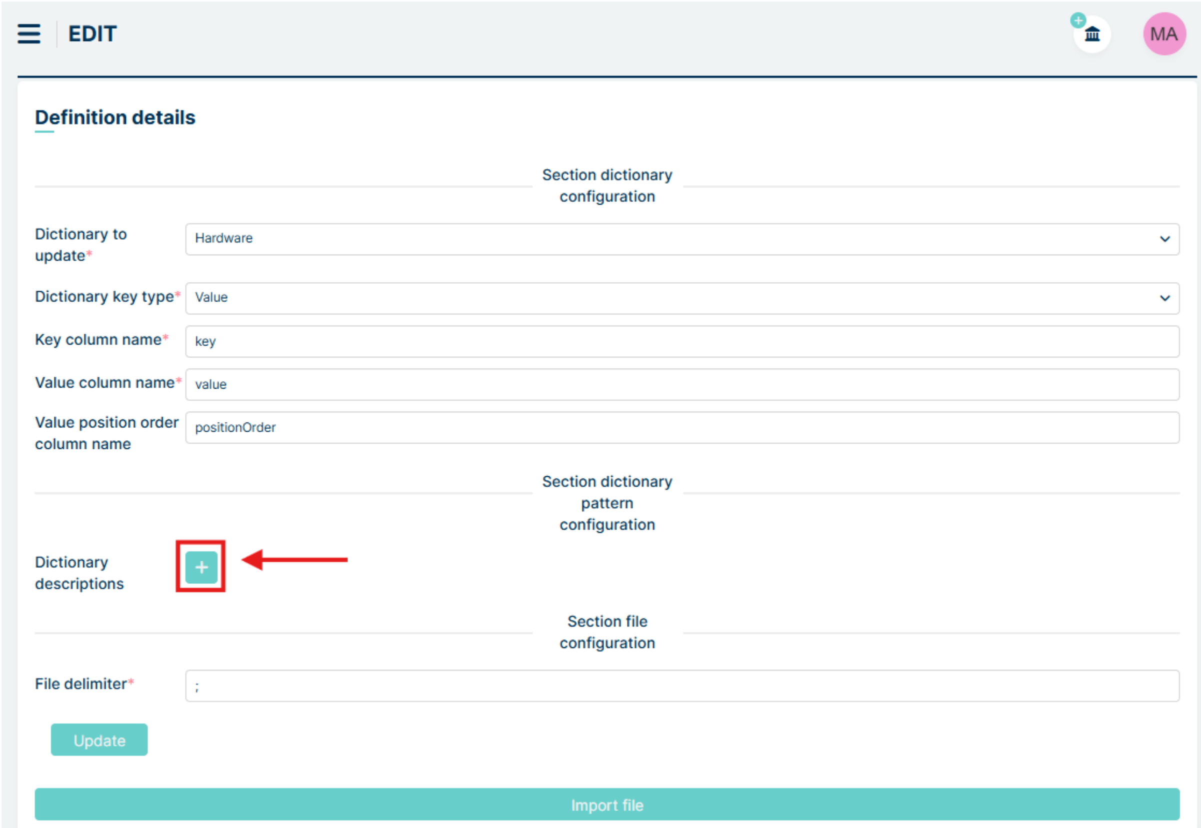


Once synchronization is successfully completed, our dictionary is updated with the values from the CSV file. Our dictionary has new entries.

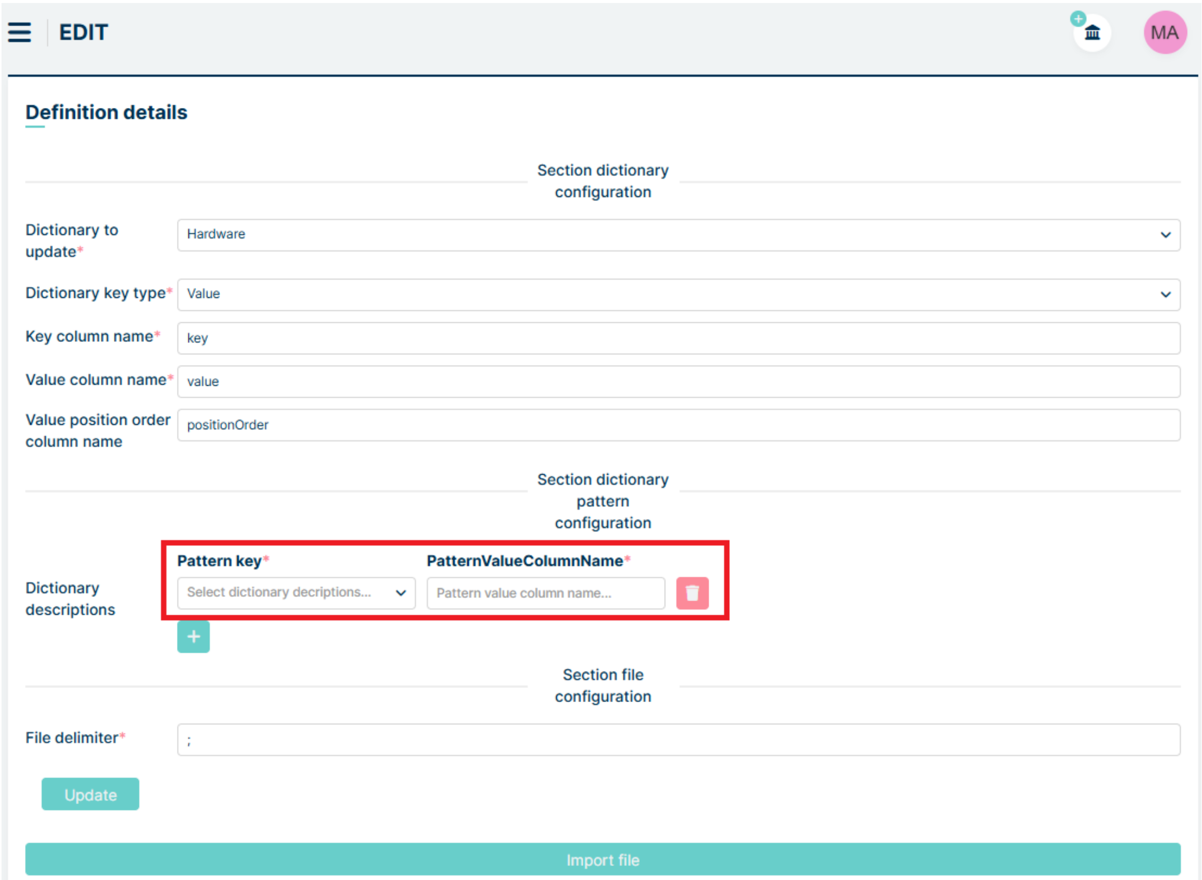


PATTERNS

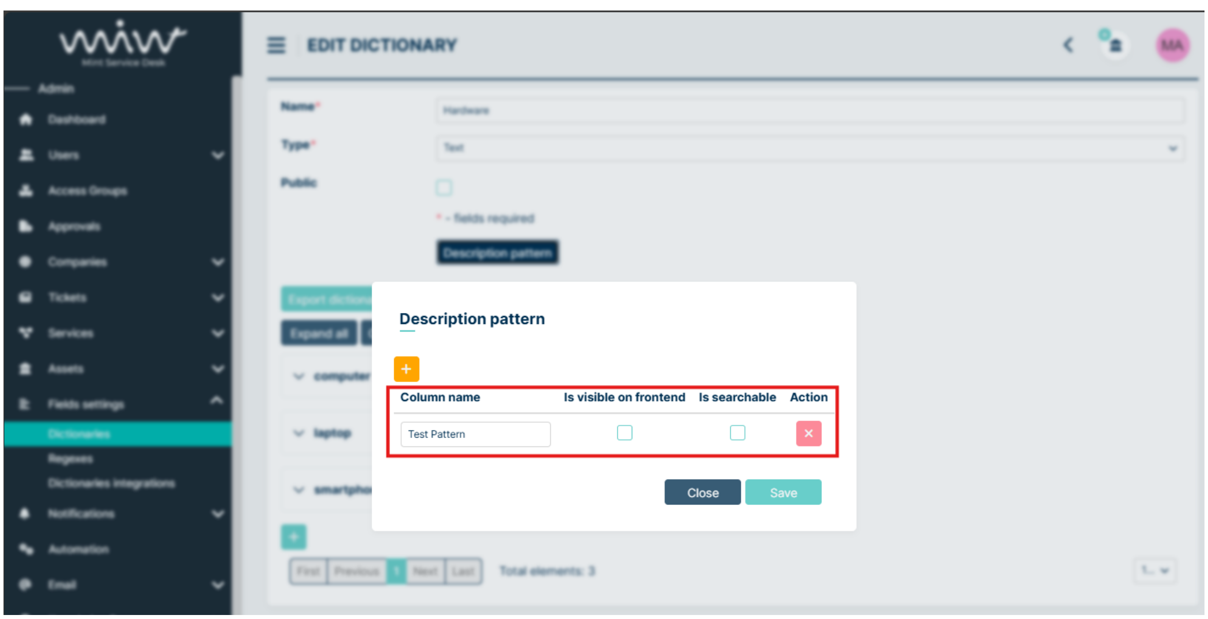
If the dictionary contains patterns, the Section dictionary pattern configuration displays  button.



Clicking the button adds a row with Pattern key and PatternValueColumnName fields. In the Pattern key field, we select the pattern name from the dictionary, and in the PatternValueColumnName field, we enter the name of the column from the file that contains the values to be imported into the pattern.



For example, we add a pattern named TEST PATTERN to our **HARDWARE** dictionary.



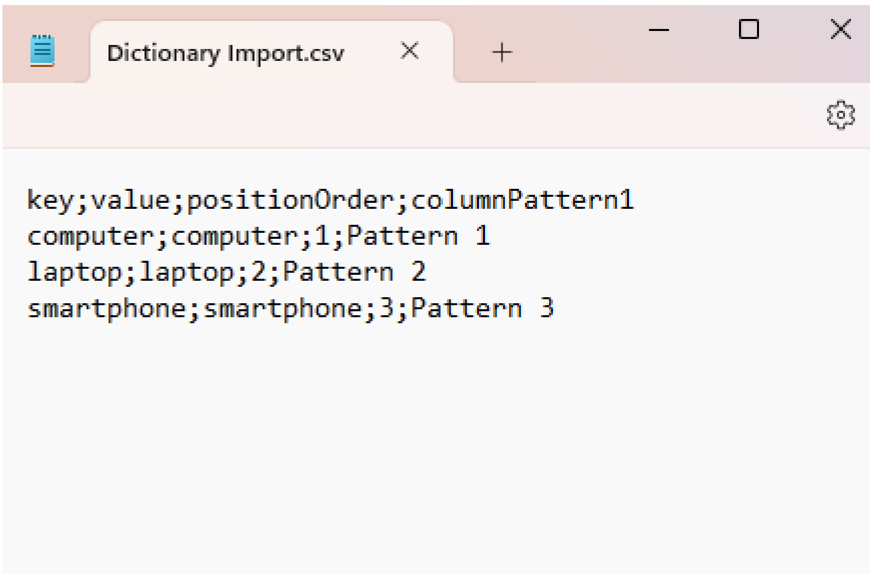
The CSV file must include this column so we need to update it. A sample first row of the file would be:

key;value;positionOrder;columnPattern1

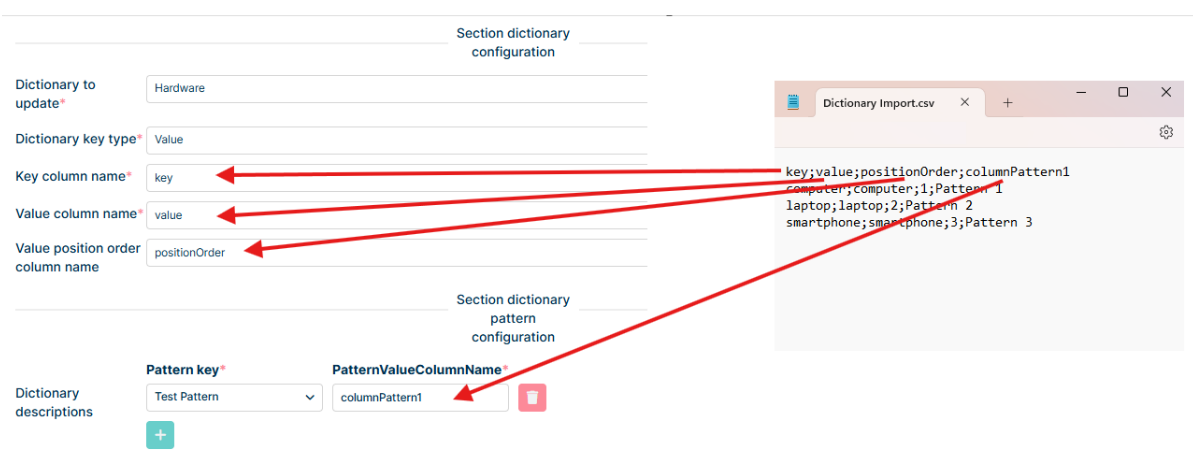
In the second and subsequent rows, we enter data analogously to the previous example, with the addition of the columnPattern1 data. The file might look as follows:

- Row 1: key;value;positionOrder;columnPattern1
- Row 2: computer;computer;1;Pattern 1
- Row 3: laptop;laptop;2;Pattern 2
- Row 4: smartphone;smartphone;3;Pattern 3

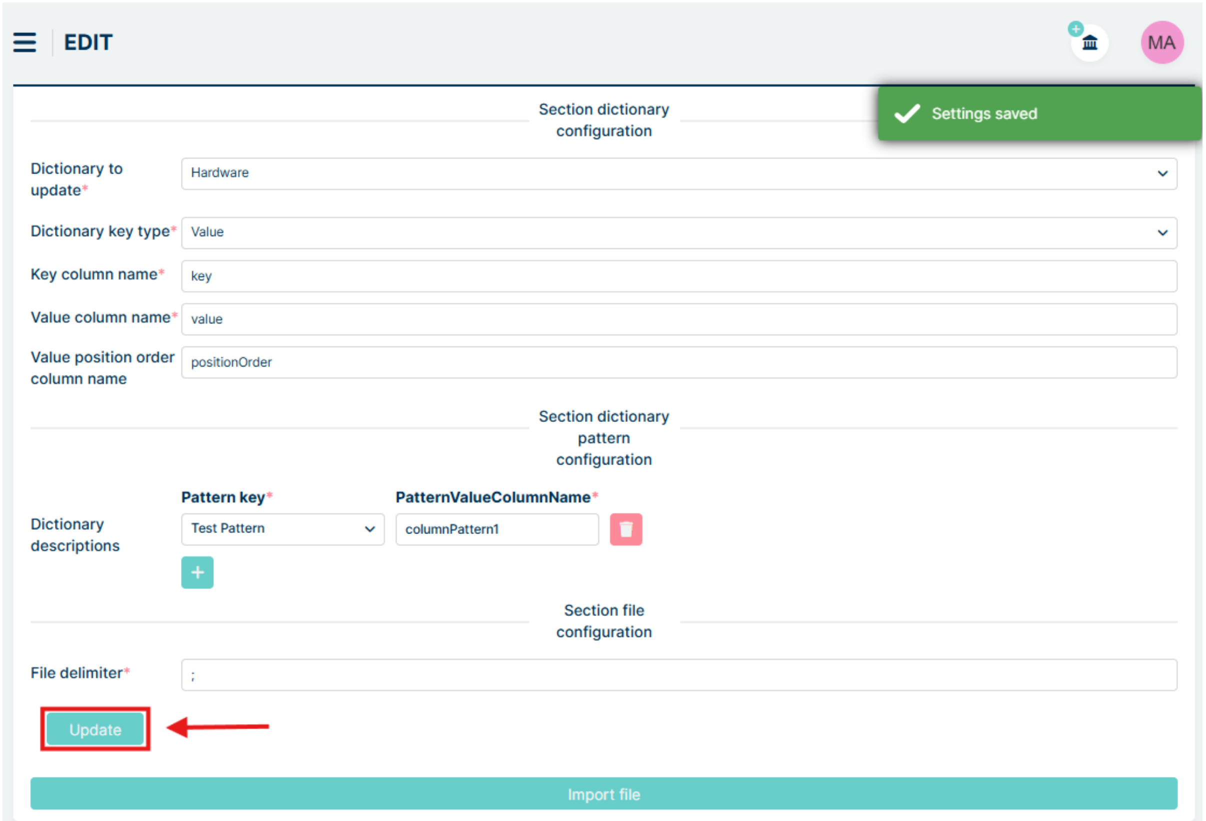
The sample file should look like below:



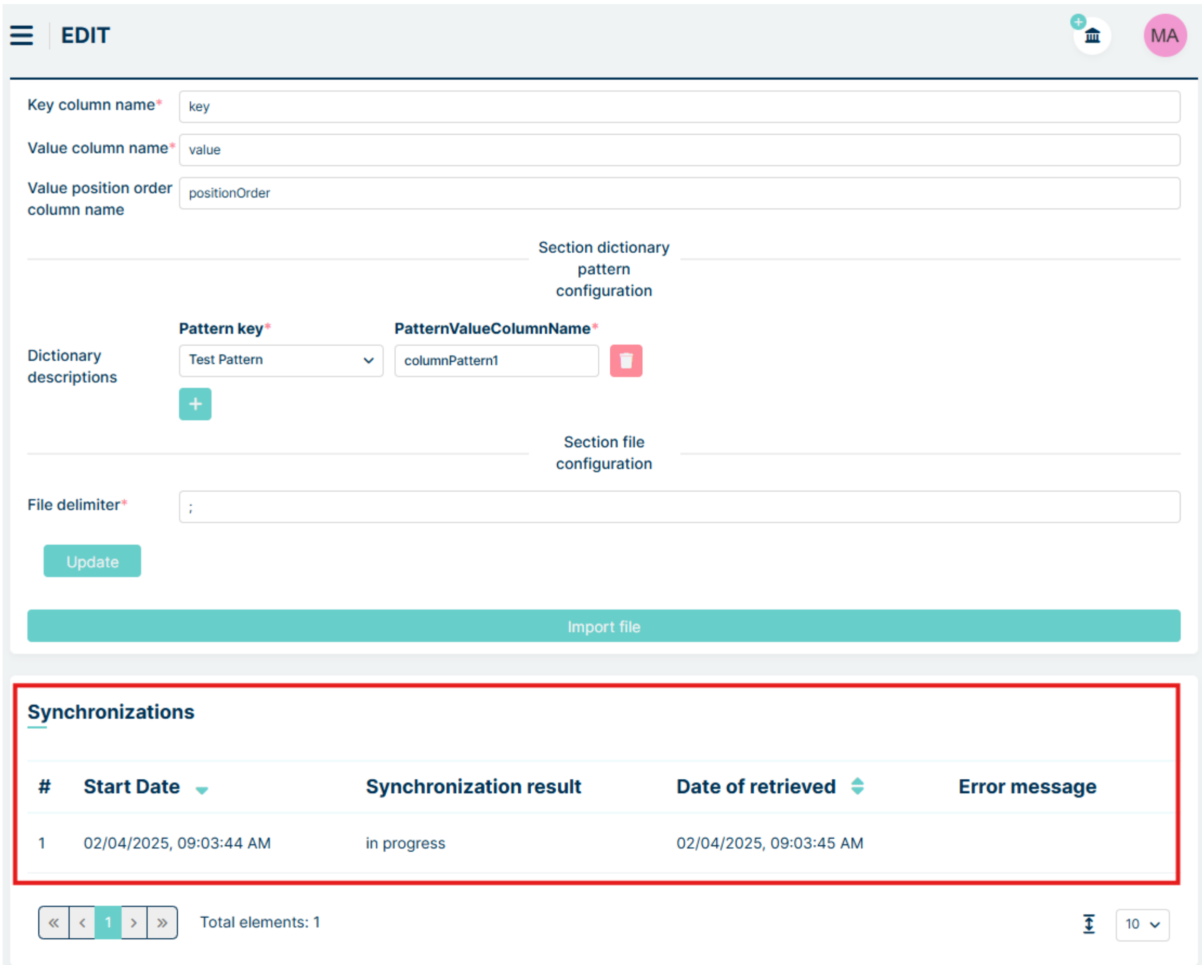
Configuration shoud look like below:



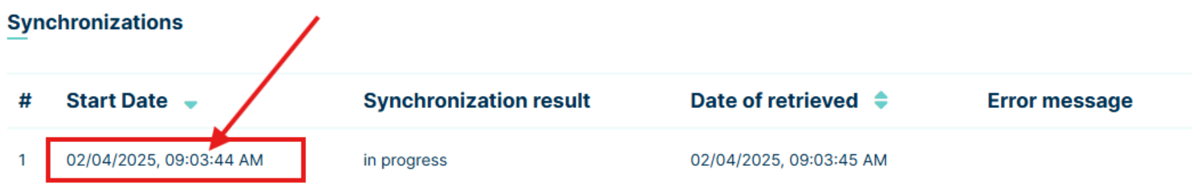
Now in the File delimiter section, we set the semicolon as data separator and click the Update button - the configuration data is updated.

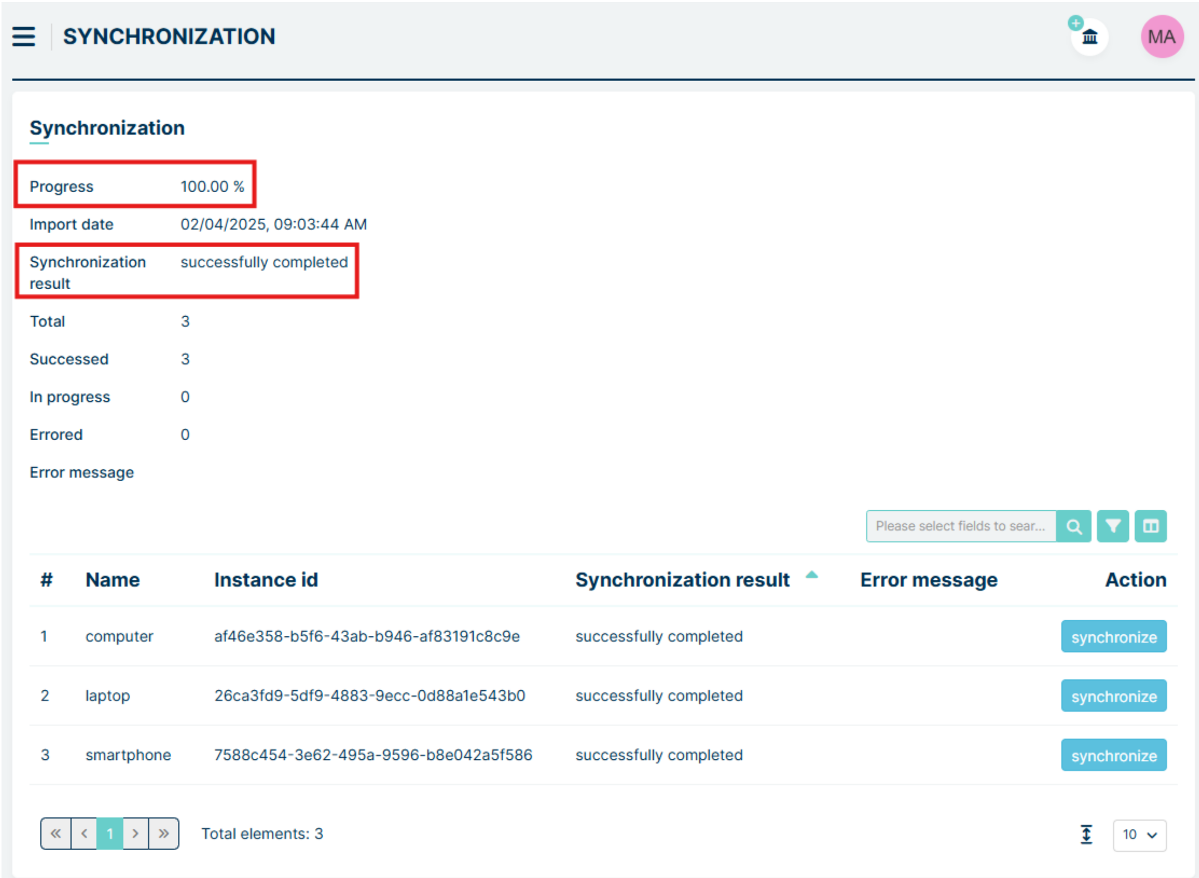


The next step in the process is to import data from the file. Click the 'Select file' button, attach the relevant file and the synchronization will start automatically.

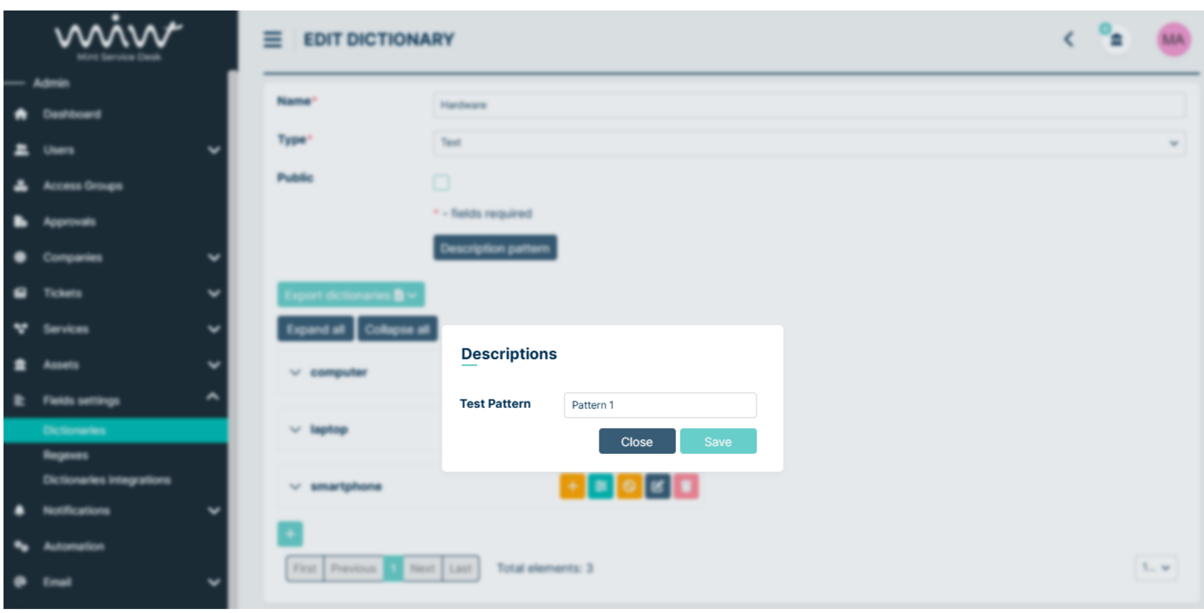


This action starts the process of retrieving dictionary values, which you can track in real time. Clicking on a selected synchronization takes you to the details, where you can also view the retrieval process and any potential errors.





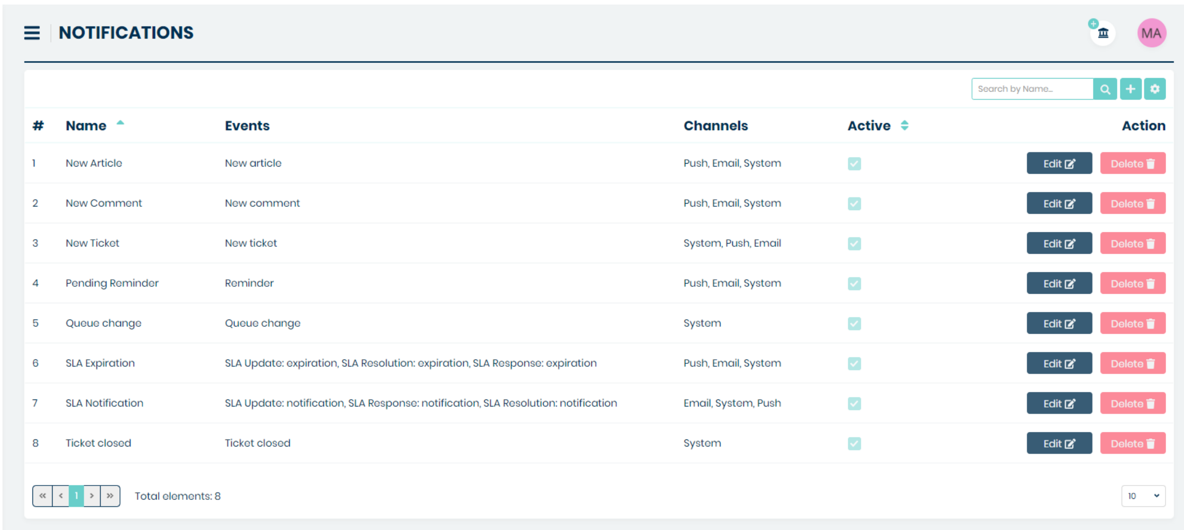
Once synchronization is successfully completed, our dictionary is updated with the values from the CSV file. Our dictionary has new data in patten fields.



5.11 NOTIFICATIONS

5.11.1 TICKETS

In this section, you will all types of notifications that are available in the MINT Service Desk system. Those are **system**, **email**, and **push**. The main view shows the list of 8 pre-defined notification, available to use the moment you start using MINT.



Let's describe each of them.

New Article: notification will be sent to the user once there is a new message (Article) in the Ticket, for example, a new reply from the Agent or Customer.

New Comment: notification will be sent to the user when there is a internal message in the Ticket Details communication section. Those are small internal messages regarding a particular Article ('Internal Discussion').

New Ticket: notification will be sent to the user, whenever there is a new Ticket in a Queue.

Pending reminder: notification will be sent to the user if he earlier set up a 'Reminder' inside the Ticket Details view, in the 'Details' section.

Queue Change: a notification will be sent to the user when the queue is changed.

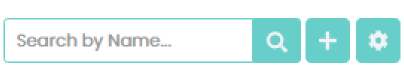
SLA Expiration: notification will be sent to the user when time runs out (timer reached 0) for SLA parameter: Response time / Update time / Resolution time, within the Ticket that has SLA/parameters.

SLA Notification: notification will be sent to the user when the SLA Parameter timer (Response / Update / Resolution) reached the Escalation point. The user will know that he has little time before time runs out (timer reaches 0) and he needs to take immediate action.

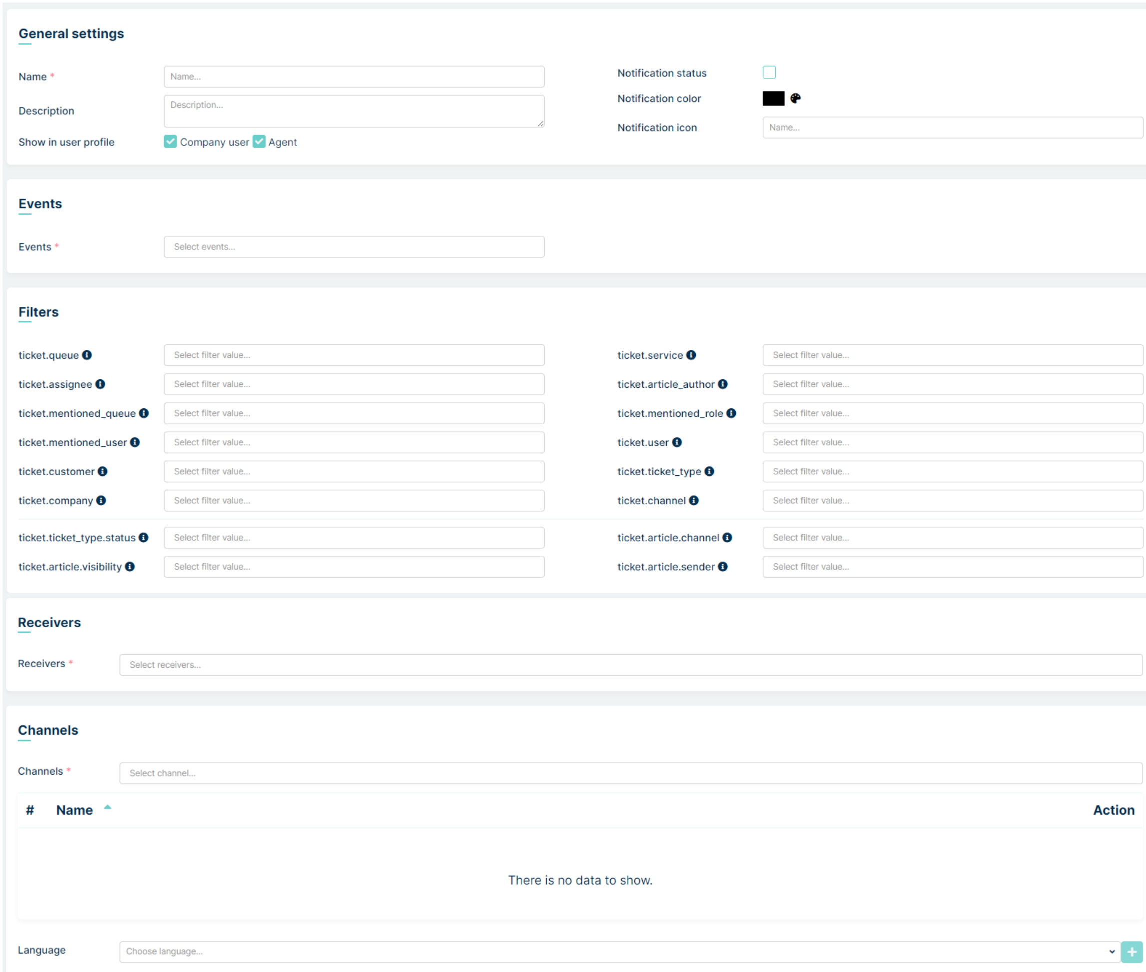
Ticket closed: a notification will be sent to the user when the ticket is closed.

Remember that the user needs to have the correct rights (given by the admin) for Queues, Tickets Types to receive some of the notifications.

If you like, you can always add some new notifications. To do so click on the  button located on the right side of the main view.

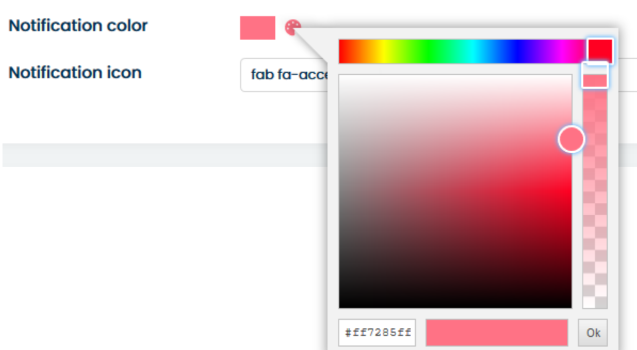


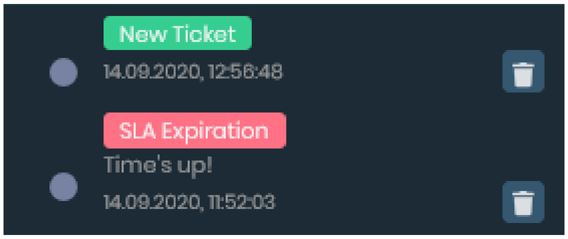
Now, in the new view, you can start the configuration of a new notification.



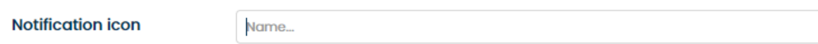
General settings

First, you need to name the notification. It is required and without it, you will not be able to save the notification. You can also put some unique description or customize your notification by setting up a unique color or even an icon.



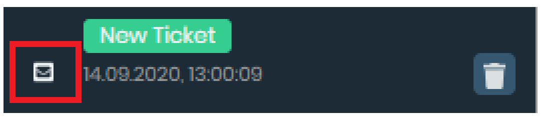


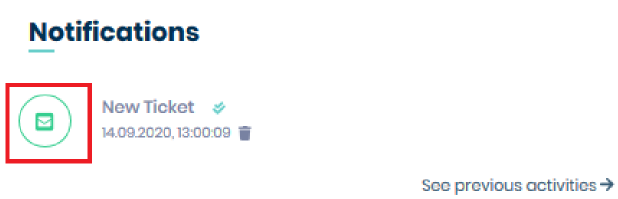
If you decide to give a notification a unique icon you need to type its name in the 'Notification icon' field.



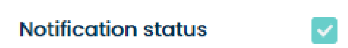
MINT supports icons available in *https://fontawesome.com/icons?d=gallery*. Go there, find the desired icon and type its name in the 'Notification icon' field in the MINT Service Desk.

After you do that you will see an icon in two places, on the 'Activities' part of the Agent and/or Customer sidebar and in the "Ticket Details" view when you click the Notification icon.





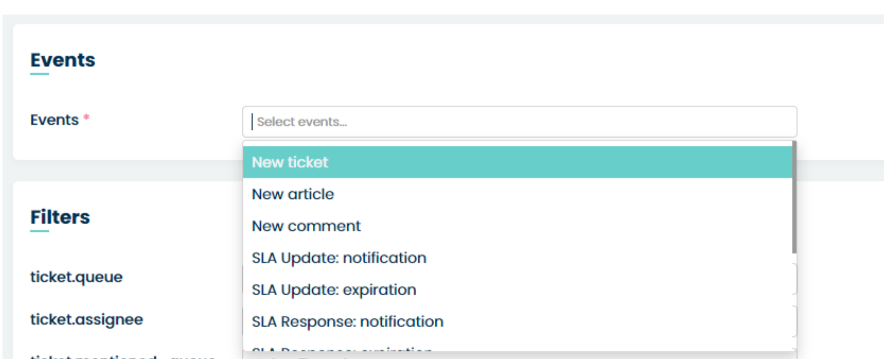
There are also two important things you can do. First, you can set the notification status: on ( ) or off ( ). Basically, it means activating/deactivating this notification.



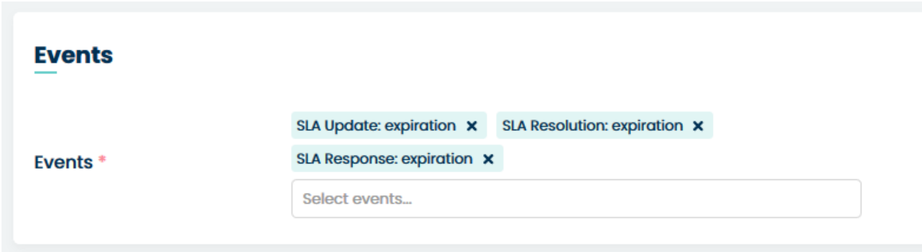
Secondly, you can choose which user will be able to see the list of his notifications and for example turn on/of some them. It was described in Web interface > Basics > Notification section of this guide.

Events

Here you can select one, or more, events for which the user will receive a notification.

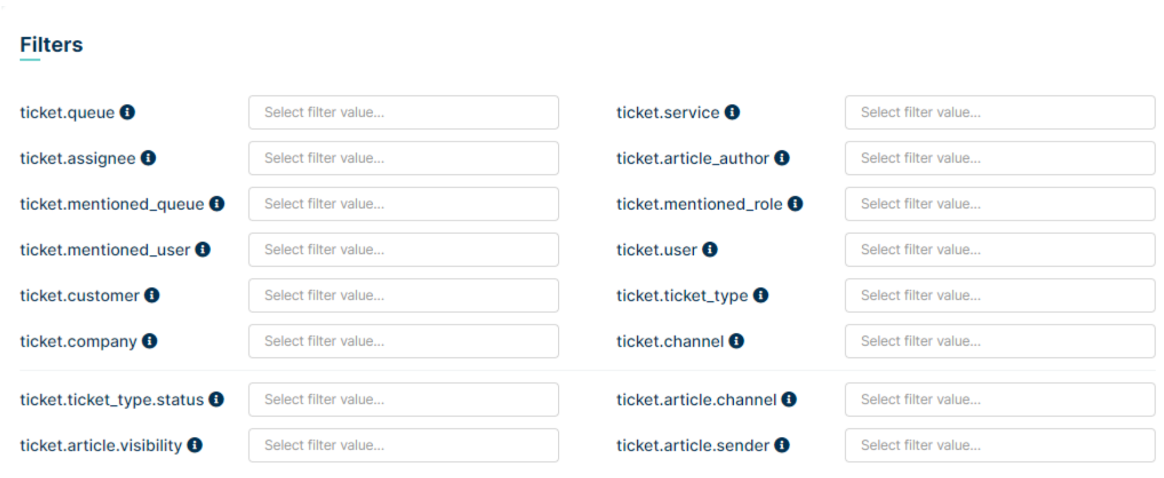


For example, if you want to notify the user when any of SLA timers (for Response, Update, Resolution) has run out you should select the following events.



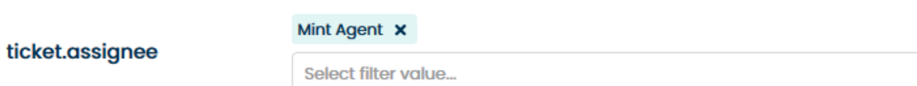
Filters

Here you can select some notification filters.

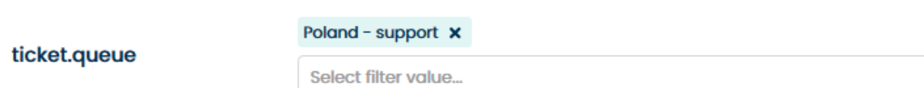


For example, if you want to send notification about a New article ('Events' = 'New article') to a person assigned to a Ticket ('Receivers' = 'ticket.assignee') you can leave it that way or put some filters.

If you want this notification to be sent only to one Agent you have to choose him from the 'ticket assignee' filter list.



Now, if additionally, you want this notification to be sent only within the Tickets from one particular queue you can choose this queue from the 'ticket.queue' filter list.

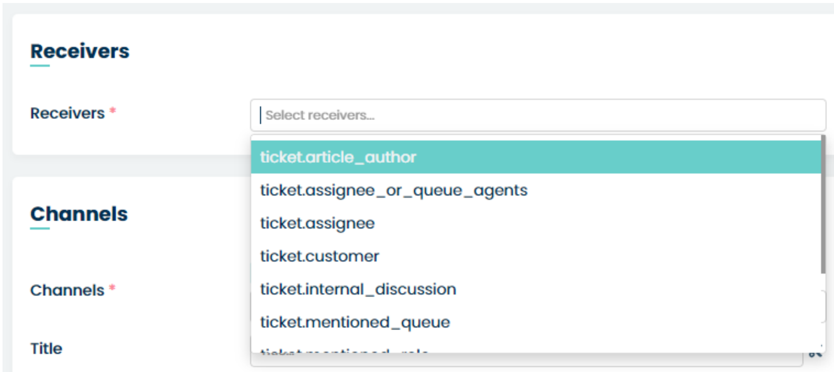


Remember that you can add multiple values for each filter.

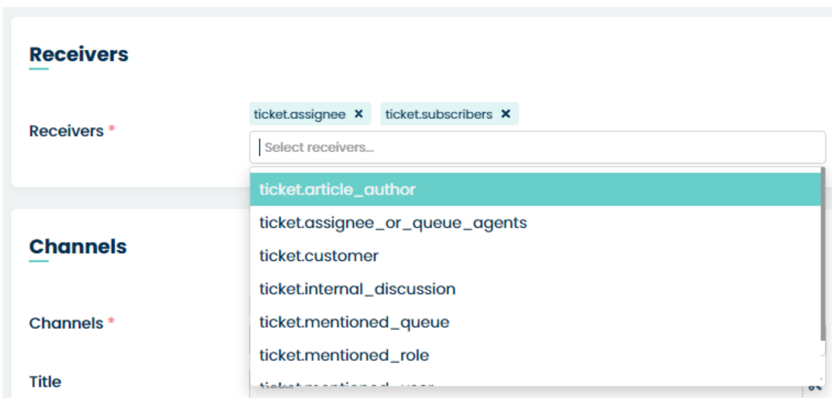
Receivers

Here you can select the main target recipient of notifications. That can be for example Customer who created the Ticket ('ticket.customer'), Agent assigned to the ticket ('ticket.assigne'), people who are subscribing to the Ticket ('ticket.subscribers), and so on.

When you click on 'Select receivers…' field you will see the list of available receivers.



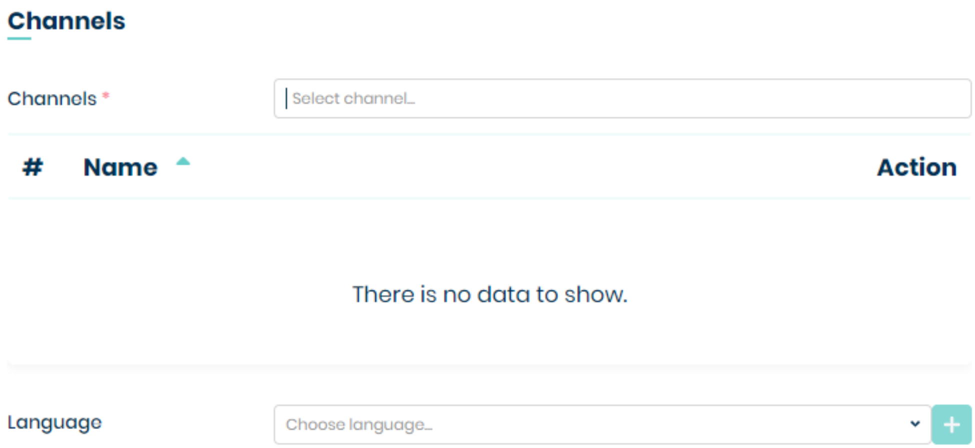
From that list, you can select and add one or more positions.



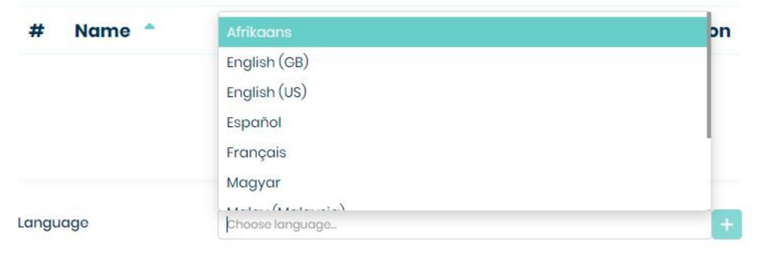
Last, but not least, you should be aware that when you choose the 'ticket.customer' system will apply some restrictions.

Channels

The last section of the process of creating a notification requires selecting a channel for which this particular notification will be used.



The next step will be to select the language from the dropdown list that you want to create a notification for.



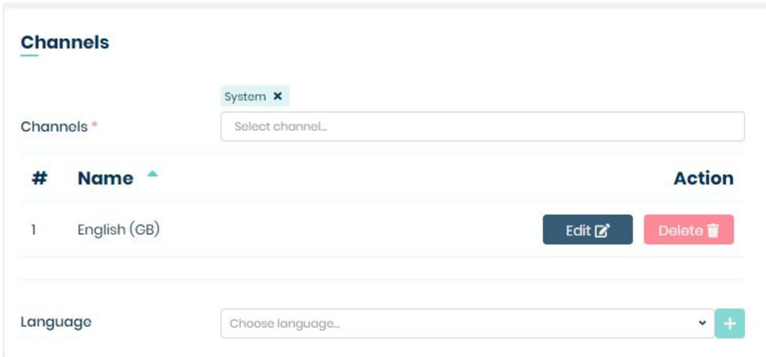
For each language, we can configure separate notification content. Agent receives a notification based on their own language setting in the MINT system. If the language the Agent works in is not defined in the notification, the default notification is sent in English (GB) or the first language on the list if we have not set up a notification in English (GB).

Example: In the Mint Service Desk system, there are two Agents - Agent 1 works in Italian and Agent 2 works in Spanish. Admin has set up a notification for both agents. During configuration, Admin saved a response template for English (GB) and Italian. If the notification is triggered, Agent 1 will receive the notification in Italian, while Agent 2 will receive it in English (GB), as the Admin did not configure a notification for Spanish.

When you have selected the channel and language, press the  button.

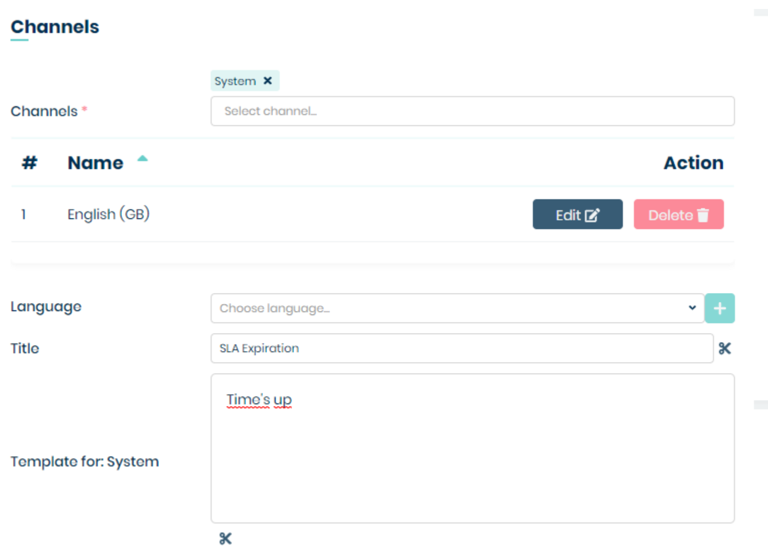
MINT Service Desk system offers 3 channels:

- **System** – notifications will be sent and visible within the system ('Activities' section on the Client/Agent sidebar),
- **Email** – notifications will be sent on user email address available in the system,
- **Push** – notification that is used specifically for the MINT Service Desk mobile application.



Now you can delete this notfication by clicking  button or edit by clicking  button.

When you press the edit button, apart from choosing the channel for notification, you can also create a name ('Title') and unique template for it ('Template for:').

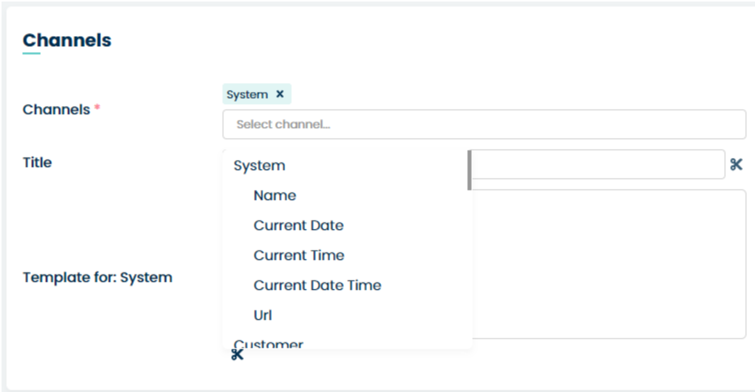


For example, when you're creating a notification about the SLA clock expiration and inside the 'Channels' section you will add the title "SLA Expiration" and as a template, you put for example "Time's out!" the final result will look like on the screen below.

However, when you leave the 'Title' field empty, system will take the 'Name' (required field in 'General setting' part) and use it as notification title.

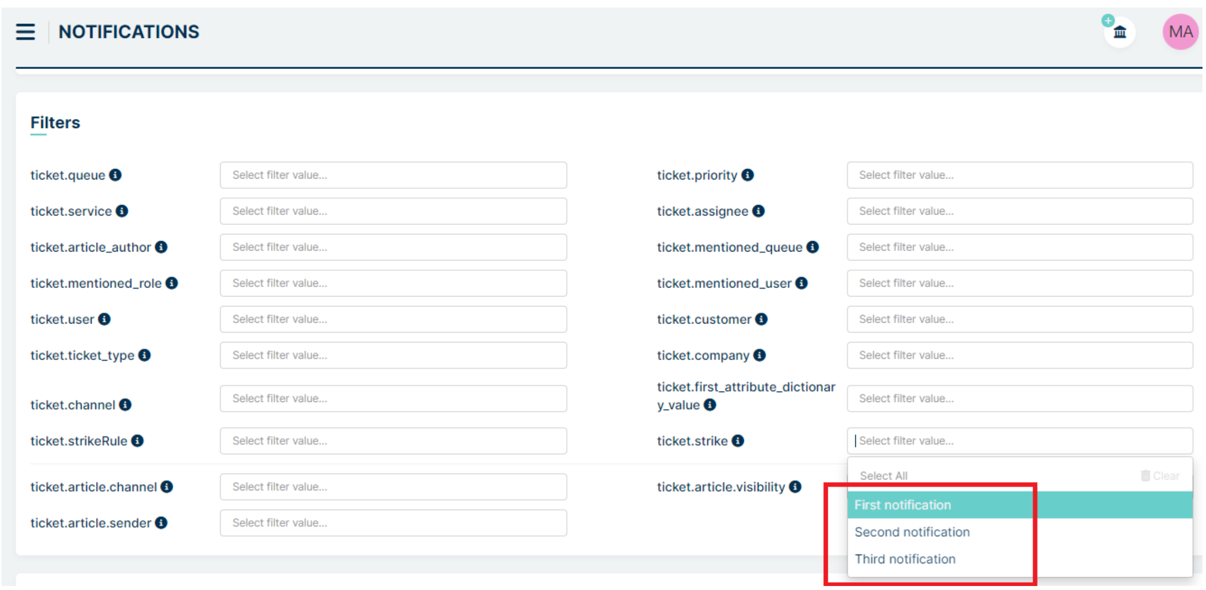
While creating a Title and Template you can use special Dynamic Fields. Once a notification is created and by the system, those fields will be replaced with correct data.

To add the Dynamic field, you need to click on the scissors icon next to 'Title' or below 'Template for:' field.

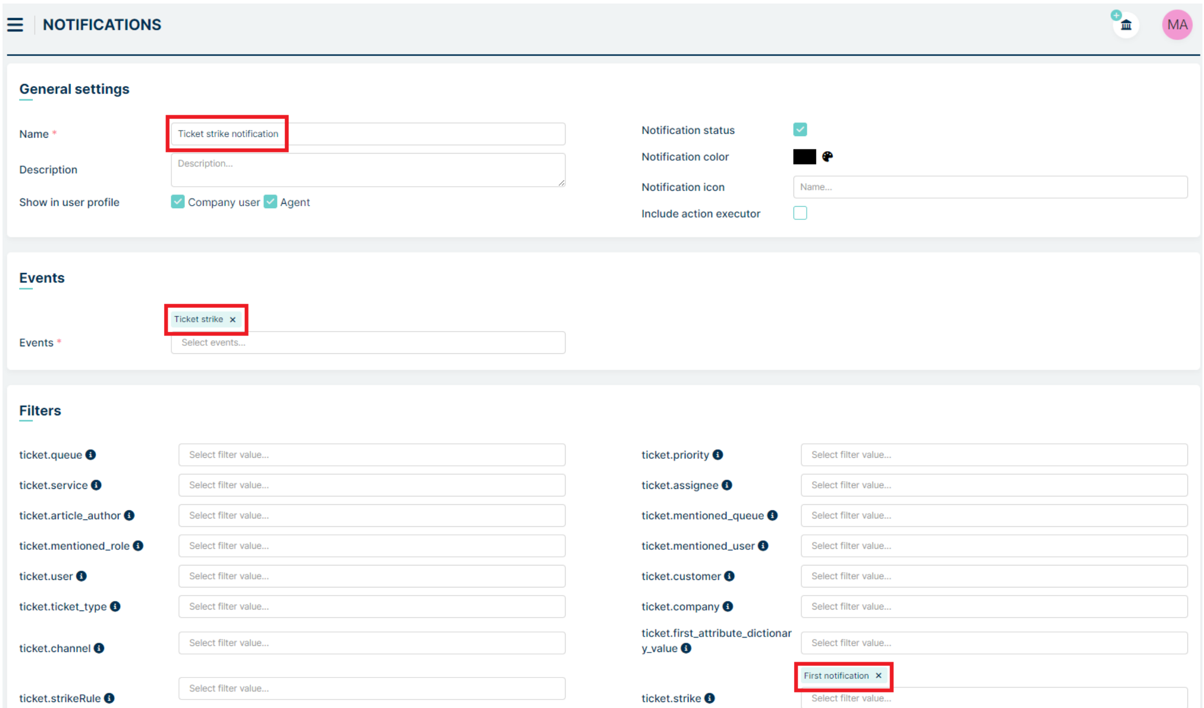


Strike rule Notification

To configure a reminder, you need to have set Strike rule configuration *(click here to visit)* and assign your configuration to Pending Autoclose status in selected ticket type *(click here to visit)*. Then create a new notification (following the creation guidelines described above). In the Events section, select **Ticket strike**. In the Filters section, find the **ticket.strike** option. Clicking on this field will display all the options configured in **Tickets** → **Strike rules**. You can select one or multiple values from the list.

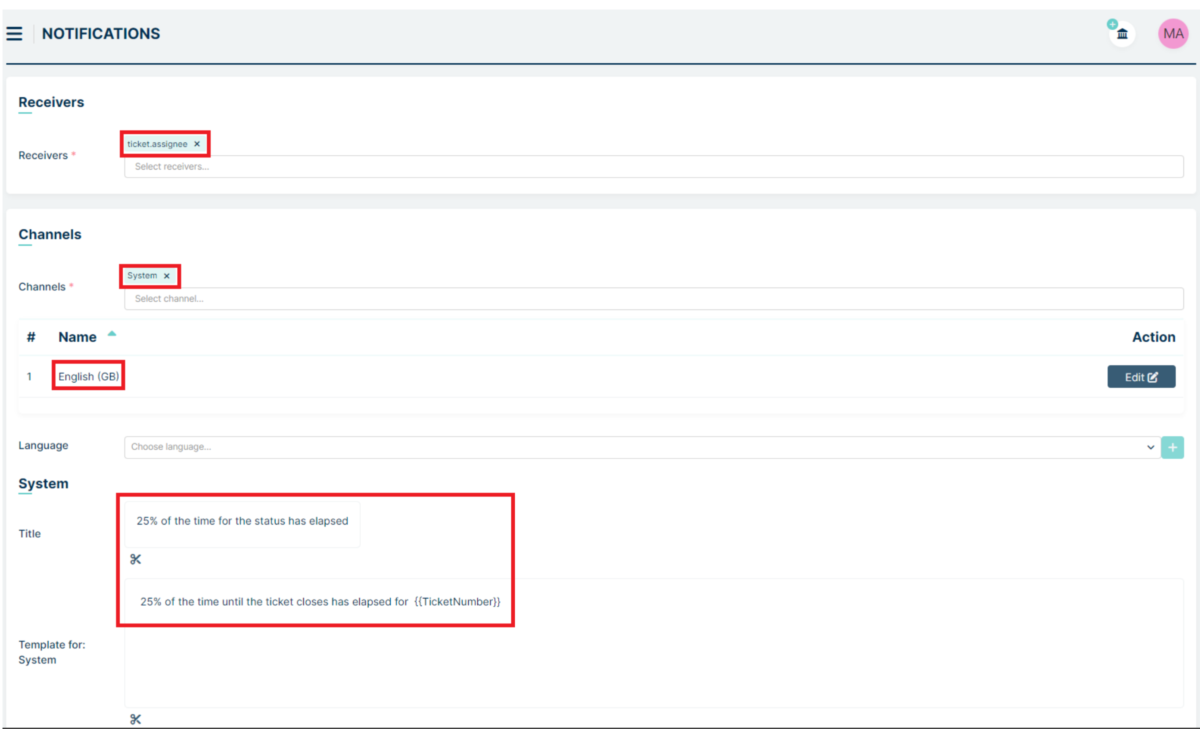


Let's set up an example configuration for the First strike option, which triggers after 25% of the time allocated to close the ticket has elapsed. Create a new notification, fill in the Name field, Events, and the ticket.strike filter.

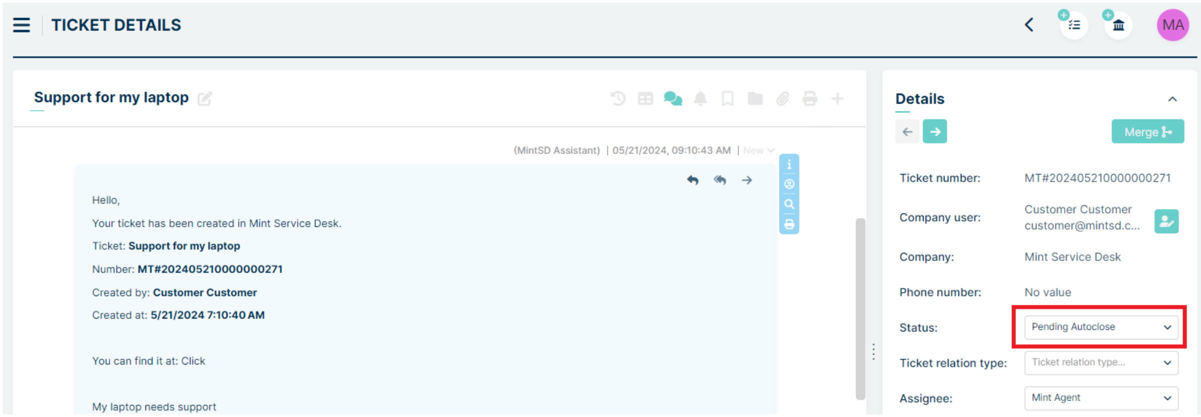


In the Receivers section, choose ticket.assignee so that the assigned agent receives the notification.

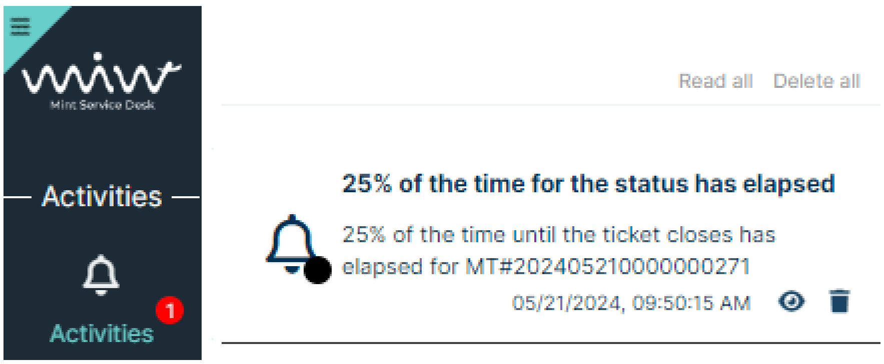
In the Channels section, select System and configure the notification content in the desired language. Fill in the notification title and template, then save it.



If our ticket status changes to Pending Autoclose:

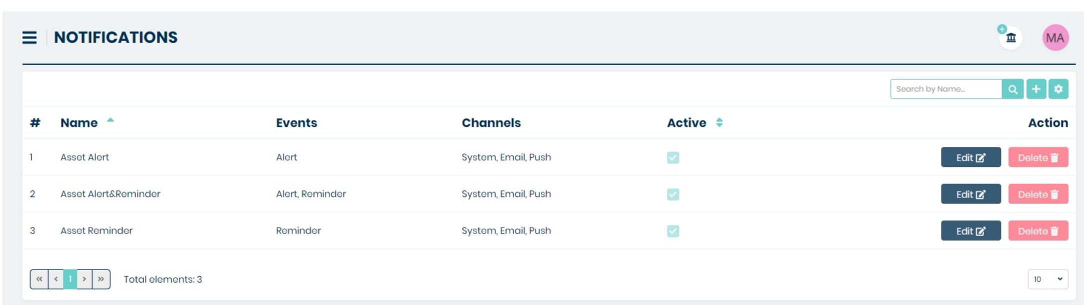


the notification will appear after 25% of the time set for the mentioned status has elapsed



5.11.2 ASSETS

This section contains all the notifications for assets in the MINT Service Desk system. Those are **system**, **email**, and **push**. The main view shows the list of 3 pre-defined notifications, available to use the moment you start using MINT.



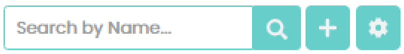
Let's describe each of them.

- **Asset Alert** - This is a notification that involves setting custom fields of the asset type 'Alert' and when the time comes the appropriate notification will be sent.
- **Asset Reminder** - This is a notification that involves setting a custom field of type "Alert" in the custom asset fields and you can add a time option of how much before the original time you want the reminder to come. When the reminder time arrives, the appropriate notification will be sent.
- **Asset Alert & Reminder** - This is a combination of the two notifications written above.

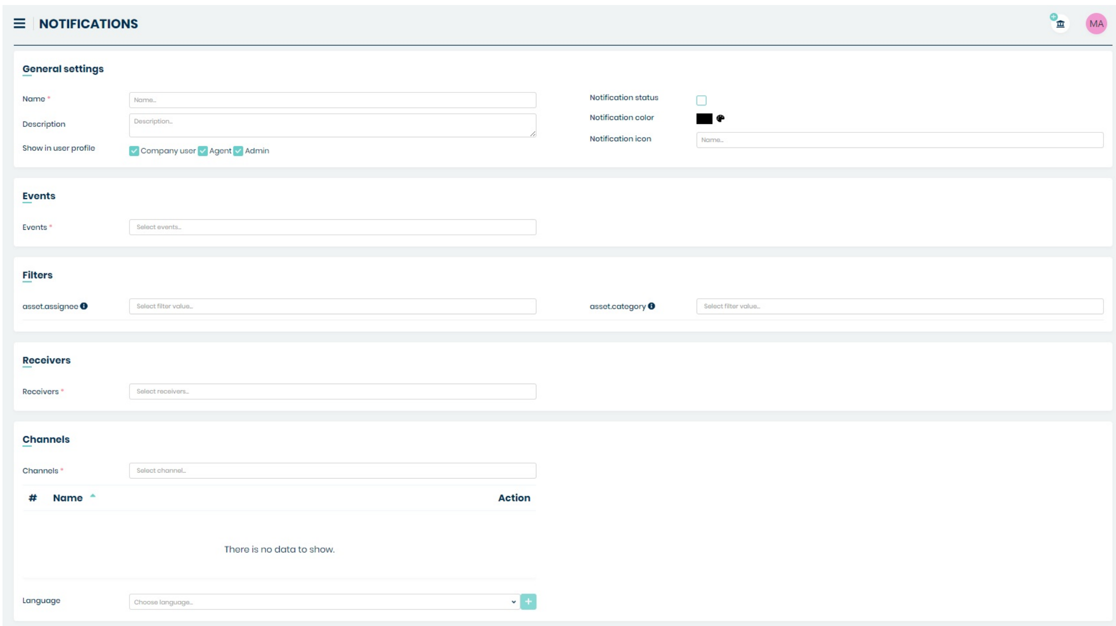
Example: The user sets the date alert to 31/05/2022 at 12:00 p.m. In addition, the user sets the reminder to 1h. This setting will cause the user to get an alert notification at 12:00 and a reminder notification an hour later.

Remember that the user needs to have the correct rights (given by the admin) for Assets to receive some of the notifications.

If you like, you can always add some new notifications. To do so click on the + button located on the right side of the main view.



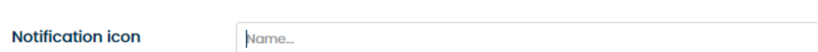
Now, in the new view, you can start the configuration of a new notification.



General settings

First, you need to name the notification. It is required and without it, you will not be able to save the notification. You can also put some unique description or customize your notification by setting up a unique color or even an icon.

If you decide to give a notification a unique icon you need to type its name in the ‘Notification icon’ field.



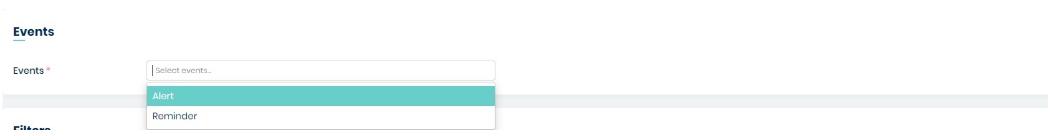
MINT supports icons available in *https://fontawesome.com/icons?d=gallery*. Go there, find the desired icon and type its name in the 'Notification icon' field in the MINT Service Desk.

There are also two important things you can do. First, you can set the notification status: on ( ) or off ( ). Basically, it means activating/deactivating this notification.

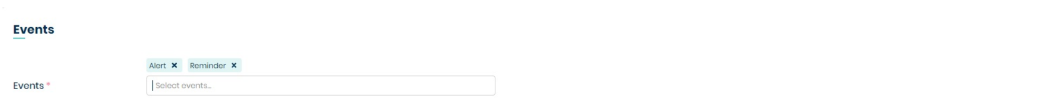
Secondly, you can choose which type of user will be able to see the notification.

Events

Here you can select one, or more, events for which the user will receive a notification.



For example, if you want to set Alert or Remind the user about assets use one of the options from the list (Alert or Reminder).

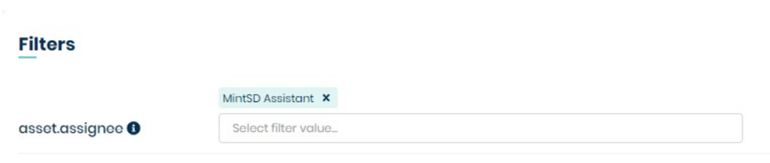


Filters

Here you can select some notification filters for assets.

For example, if you want to send notification ('Events=' Alert or Reminder) about an assets to a person assigned to an asset ('Receivers' = 'asset.assigne') you can leave it that way or put some filters.

However, if you want this notification to be sent only to one particular Agent you have to choose him from the 'asset.assignee' filter list.



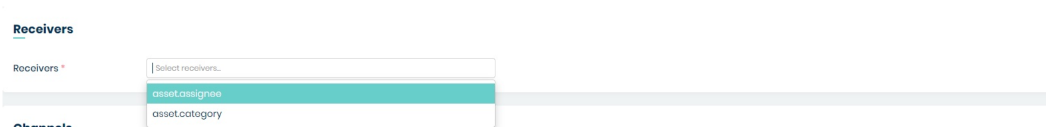
Now, if additionally, you want this notification to be sent only within the Assets from one particular category you can choose this category from the 'assets.category' filter list.

Remember that you can add multiple values for each filter.

Receivers

Here you can select the main target recipient of notifications. That can be for example user Assigned to asset or Category where the asset is located.

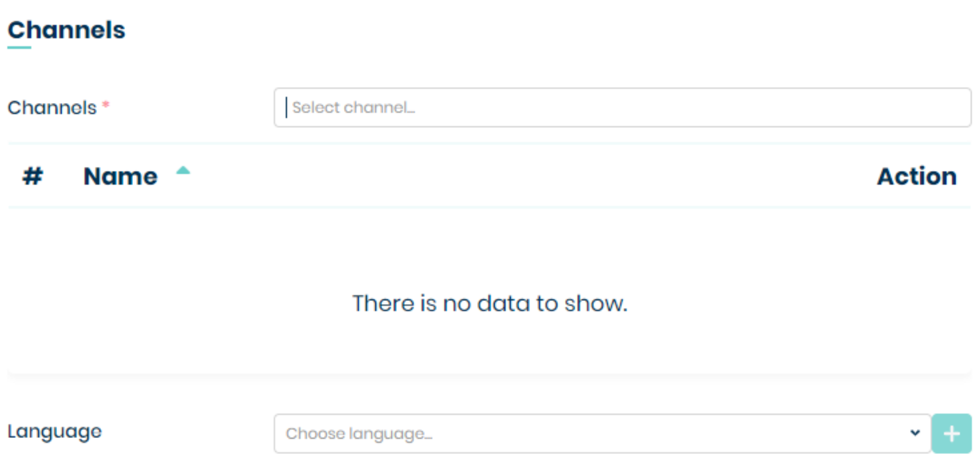
When you click on 'Select receivers…' field you will see the list of available receivers.



From that list, you can select and add one or more positions.

Channels

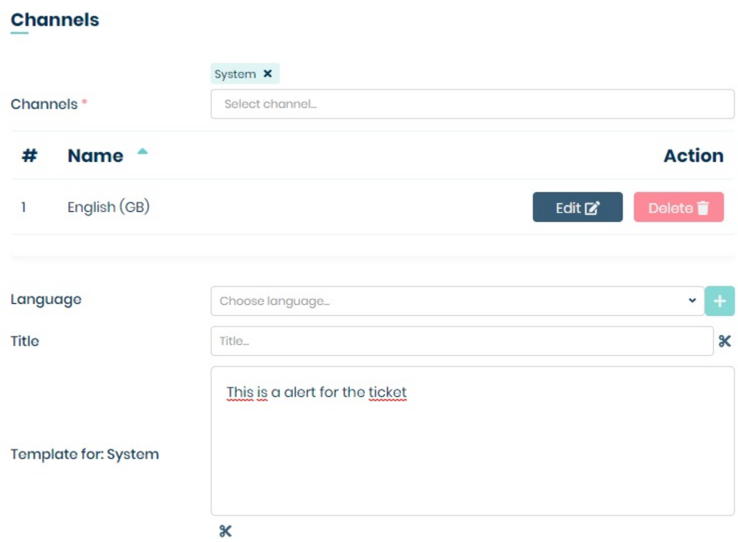
The last section of the process of creating a notification requires selecting a channel for which this particular notification will be used.



MINT Service Desk system offers 3 channels:

- **System** – notifications will be sent and visible within the system ('Activities' section on the Client/Agent sidebar),
- **Email** – notifications will be sent on user email address available in the system,
- **Push** – notification that is used specifically for the MINT Service Desk mobile application.

Apart from choosing the channel for notification, you can also create a name ('Title') and unique template for it ('Template for:').

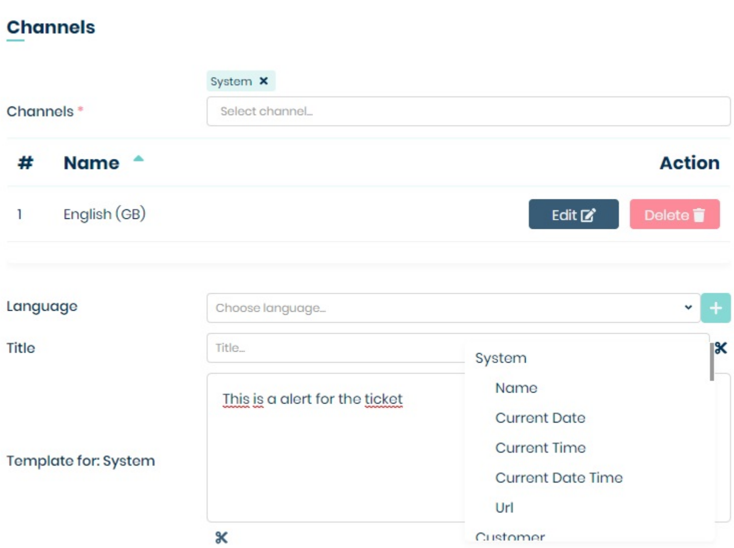


For example, when you're creating a notification about the Assets reminder and inside the 'Channels' section you will add the title "Assets Reminder" and as a template, you put "Asset Reminder" the final result will look like on the screen below.

However, when you leave the 'Title' field empty, system will take the 'Name' (required field in 'General setting' part) and use it as notification title.

While creating a Title and Template you can use special Dynamic Fields. Once a notification is created by the system, those fields will be replaced with correct data.

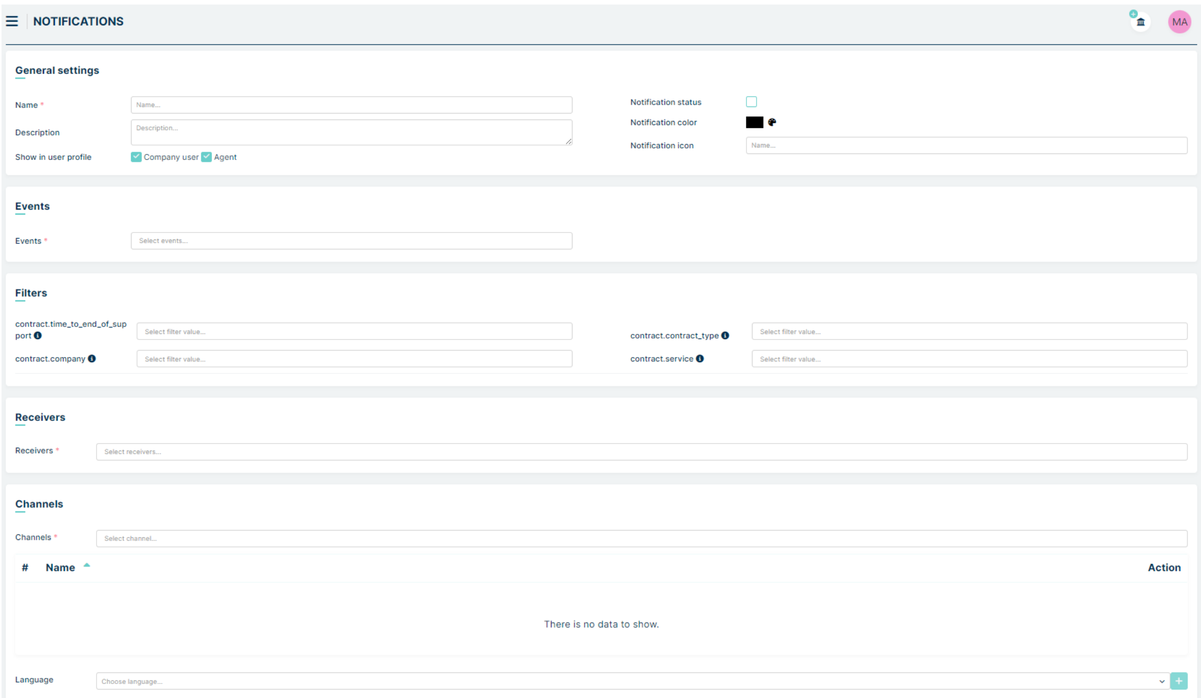
To add the Dynamic field, you need to click on the scissors icon next to 'Title' or below 'Template for:' field.



5.11.3 CONTRACTS

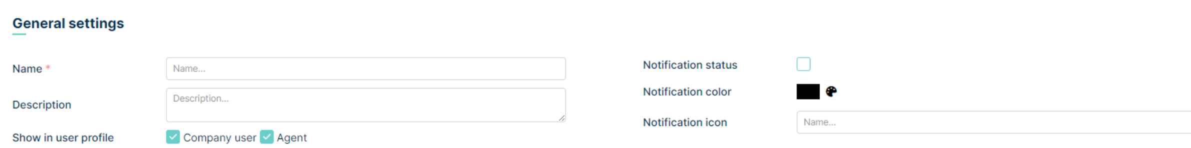
This section contains all the notifications for Contracts in MINT Service Desk - system, email, and push.

If you like to add some new notifications, click on the  button located on the right side of the main view. Now you can start the configuration of a new notification



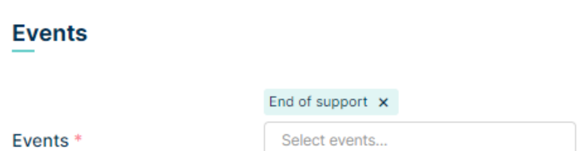
General settings

The first section is similar to that in the Ticket and Asset notifications and is described there.



Events

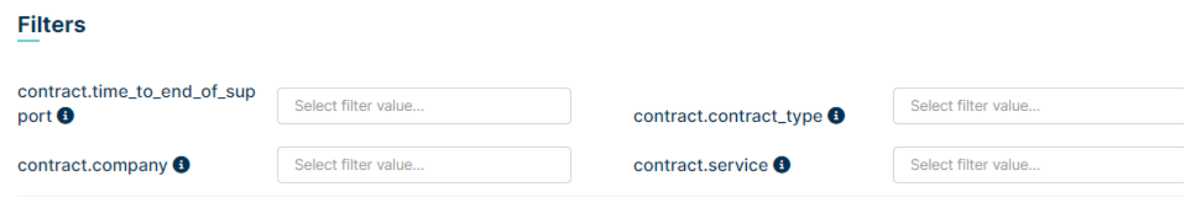
Here you can select one, or more, events for which the user will receive a notification.



For example, event "End of support" means a notification will be sent to recipients when the contract ends.

Filters

Here you can select some notification filters



Let's describe them here

– **contract.time_to_end_of_support** - you can set here how long before contract ends the notification will be sent. You can choose "Day", "Week" or "Month"

– **contract.company** - here you can select the companies that are assigned to the contracts

– **contract.contract_type** - you can limit your contracts report to specific Contract Type

– **contract.service** - you can filter your report by specific services linked to contracts

Receivers

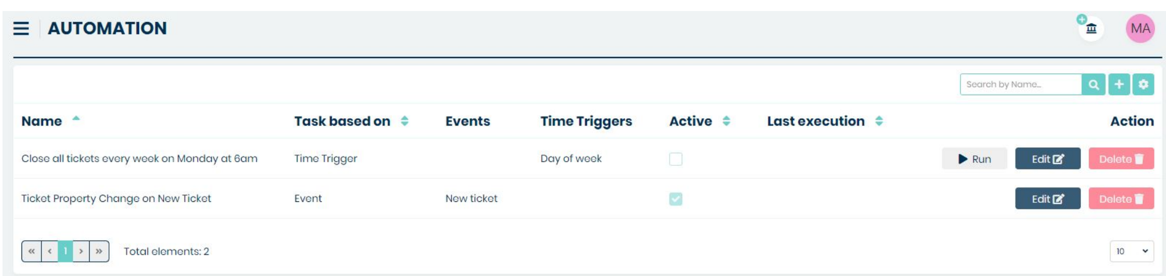
This section is similar to that in the Ticket and Asset notifications and is described there.

Channels

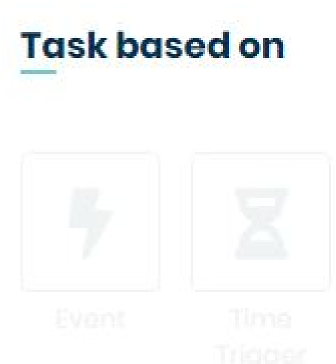
This section is similar to that in the Ticket and Asset notifications and is described there.

5.12 AUTOMATION

The Automation section is used to perform actions automatically based on **Events** or **Time Trigger**.



In order to start adding a new Automation, you need to click on the  button, located on the right side, next to the search field. You will see that a new section has been opened.



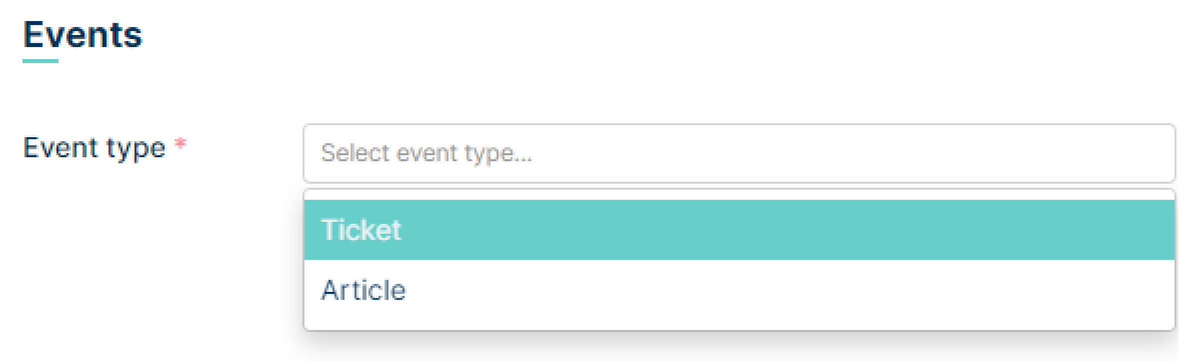
You are presented with a choice of either Events or Time Trigger. Both configurations will be described below.

5.12.1 EVENT

The first section when configuring automation of the Events type is **General settings**. Here you need to enter the name that the automation will have. You can also enter its signature and check the checkbox that says 'Is active' if you want the automation you create to be active at the start. If you don't check it now, don't worry, later you can edit the automation and enable it.

The second section is **Events** where you can configure what action the automation should react to. After clicking the 'Event types' dropdown menu there are two options to choose from:

- ticket
- article



After selecting one option, another dropdown menu named 'events' will appear. In this section you select what event the automation should respond to. For ticket and article these events are different. The second section is Events where you can configure what action the automation should react to. After clicking the 'Event types' dropdown menu there are two options to choose from:

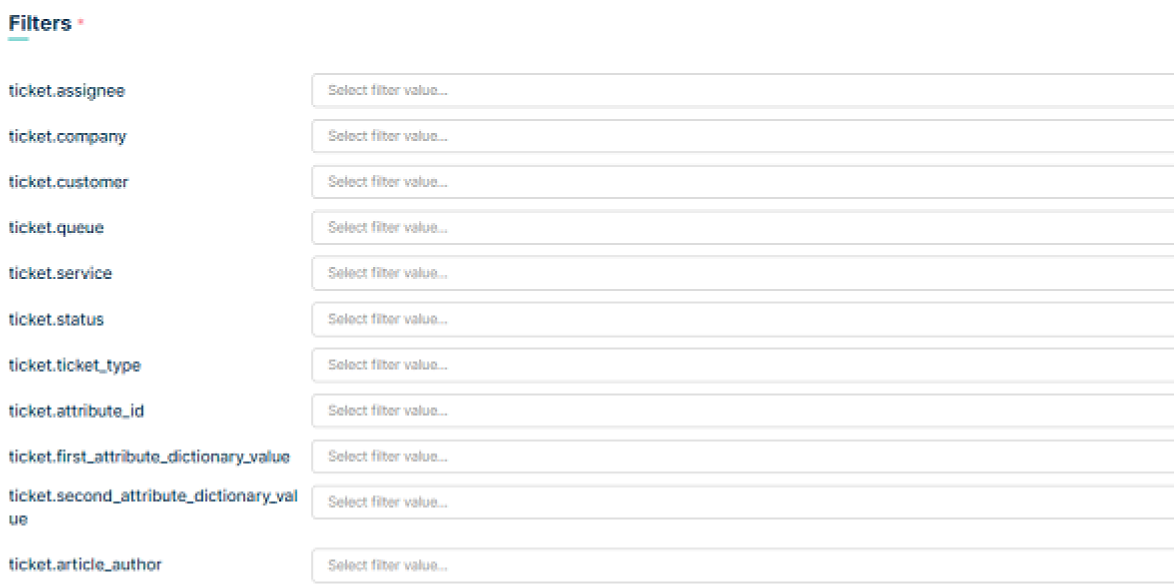
ticket:

- Assignee changed
- New ticket
- Queue changed
- Status change
- Value changed
- Ticket type change

article:

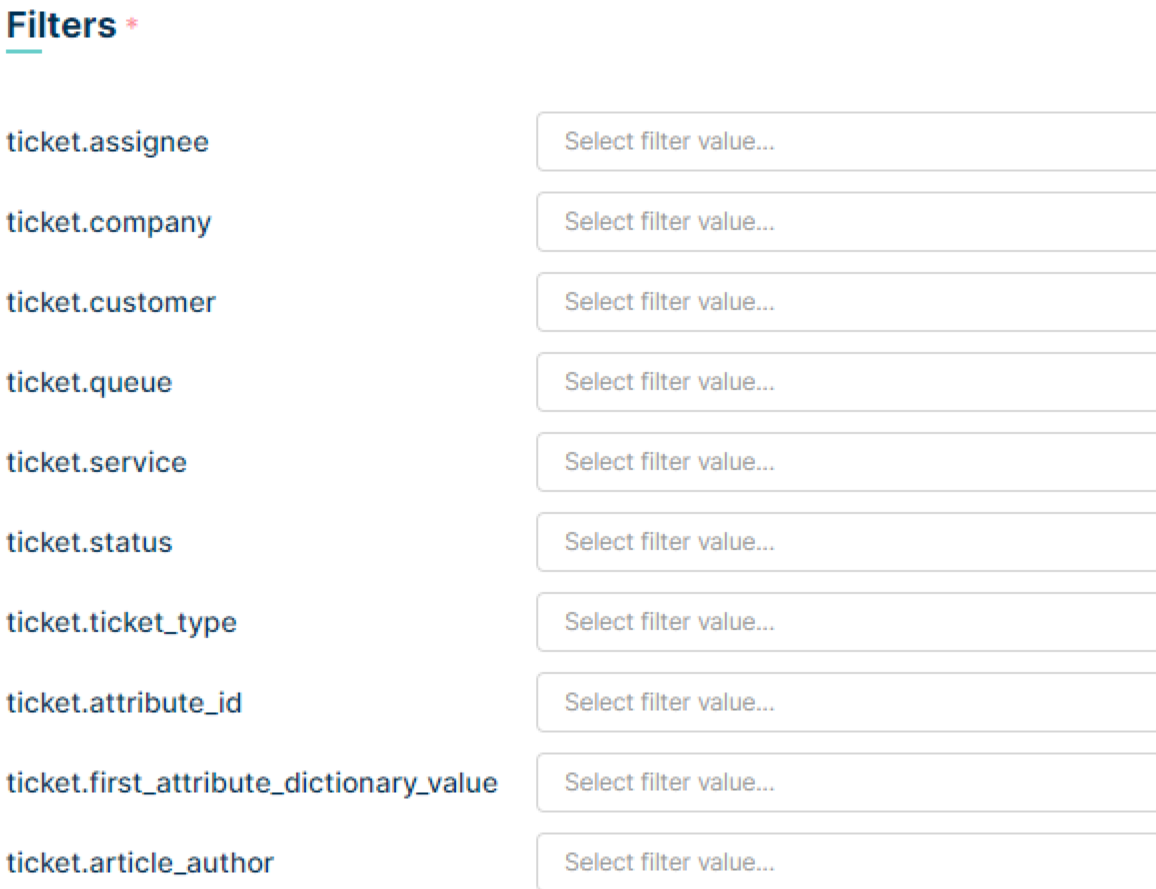
- New article
- New comment

The next section in automation is **Filters**. This section differs for ticket and article. In this section, we can filter tickets or articles according to our preferences.



for ticket:

- **ticket.assignee** - filters by the agents assigned to the ticket.
- **ticket.company** - filters by the company assigned to the ticket.
- **ticket.customer** - filters by customer.
- **ticket.queue** - filters by the queue in which the ticket is created.
- **ticket.service** - filters by the service in which the ticket is created.
- **ticket.status** - filters by the status in which the ticket is created.
- **ticket.ticket_type** - filters by ticket type in which the ticket is created.
- **ticket.attribute_id** - filters by the attribute created in custom fields.
- **ticket.first_attribute_dictionary_value** - filters by the attribute created in dictionary.
- **ticket.second_attribute_dictionary_value** - filters by the attribute created in dictionary.
- **ticket.article_author** - filters by article author.



for article:

- **ticket.assignee** - filters by the agents assigned to the ticket.
- **ticket.company** - filters by the company assigned to the ticket.
- **ticket.customer** - filters by customer.
- **ticket.queue** - filters by the queue in which the ticket is created.
- **ticket.service** - filters by the service in which the ticket is created.
- **ticket.status** - filters by the status in which the ticket is created.
- **ticket.ticket_type** - filters by ticket type in which the ticket is created.
- **ticket.attribute_id** - filters by the custom field.
- **ticket.first_attribute_dictionary_value** - filters by dictionary value.
- **ticket.article_author** - filters by article author.

The last section when configuring automation is **Actions**. Here you decide what will happen to the ticket or article when it passes the filter.

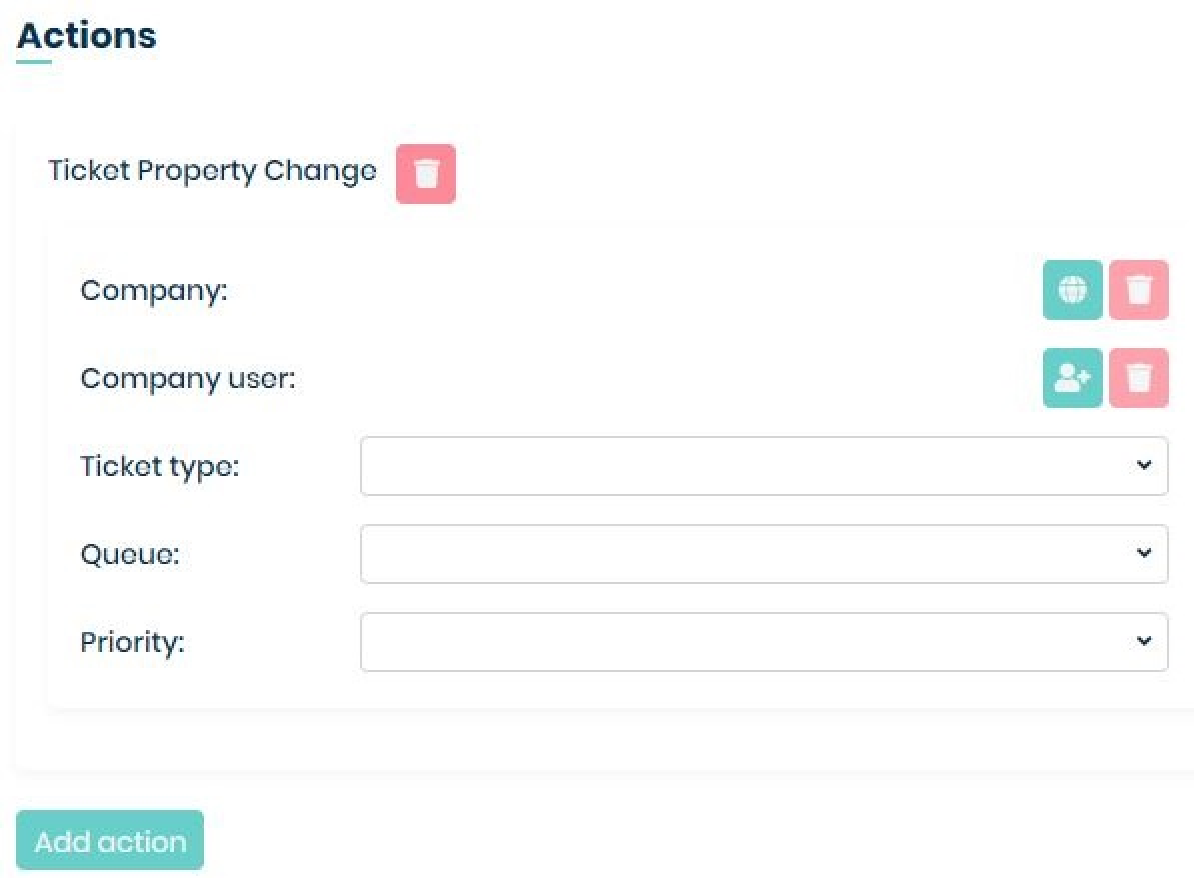
To start the configuration you need to press 

button. Then a dropdown menu will appear from which you can select the option you are interested in and then press  button.

Selectable options for event type:

- **Ticket Property Change** - This option allows you to automatically change the tickets parameters.
- **Ticket Dynamic Fields Change** - This option allows you to automatically change the custom fields in the selected Ticket Type.
- **Ticket Property Change by Dynamic Field value** - This option allows you to change ticket properties based on the value of a dynamic field.

Then the whole list of possible options will be displayed.



Of the options available for configuration are:

- Company
- Company users
- Ticket type
  - Status
- Queue

    - Assignee

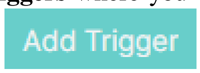
- Priority

Press 

button to complete the automation setup process.

5.12.2 TIME TRIGGER

Unlike **Event** automation, **Time Trigger** automation relies on a single date, day of week or period of time. The global setting configuration is identical to the events configuration.

The second section is **Time Triggers** where you configure when you want the automation to turn on. To start the configuration, you need to press 

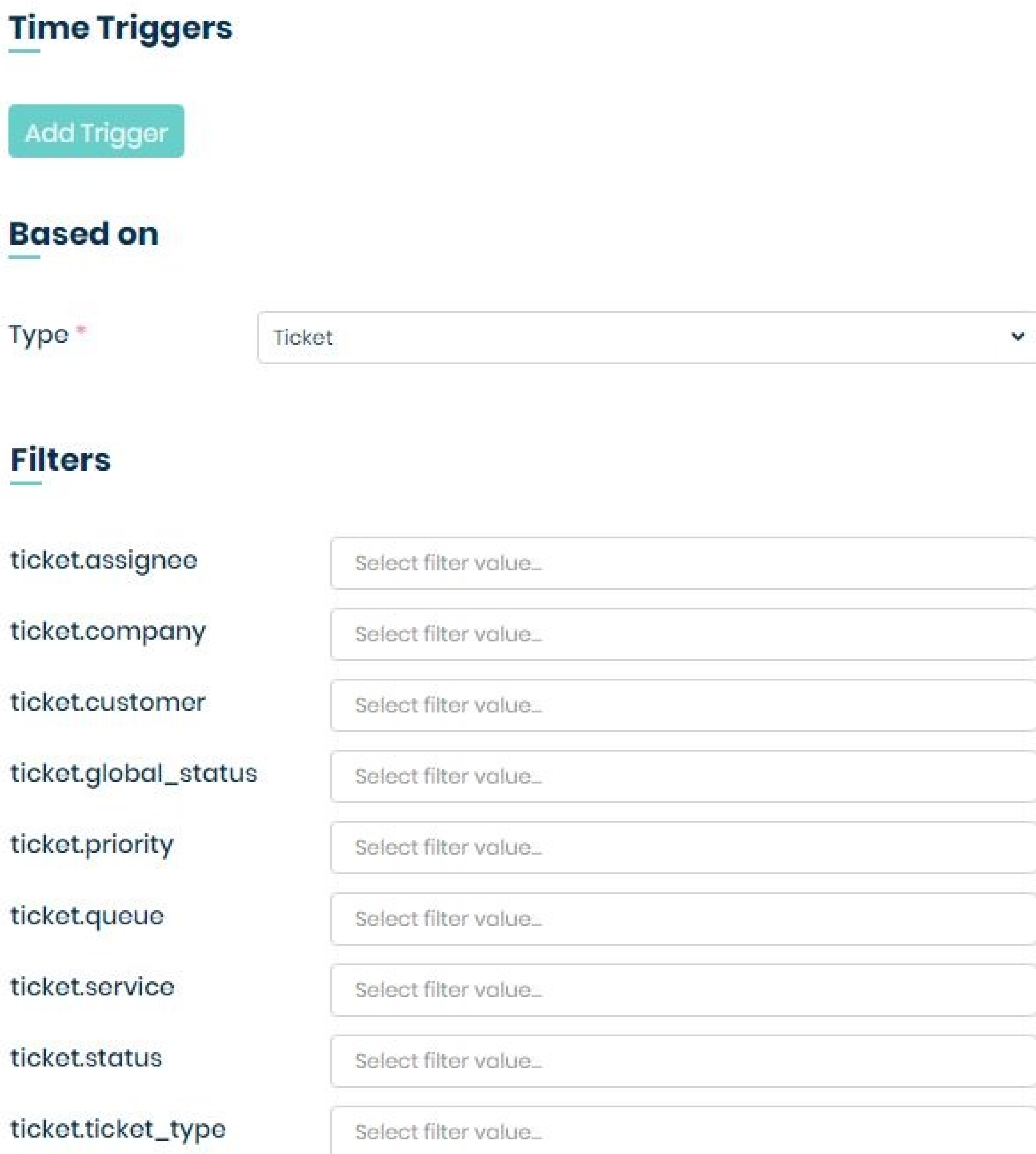
button.

When this button is pressed, a dropdown menu will appear with three possible options:

- Single date
- Day of week
- Period of time

After selecting the appropriate time trigger, press  button.When you do this a new field will appear in place of this dropdown menu depending on what you selected in the dropdown menu. Below is an example of a field after selecting Period of time.

The next sections are **Based on** and **Filters**, which are related. In Based on, select an option from the dropdown menu (currently there is only a Ticket selection). Then the whole filter configuration will appear.



- **ticket.assignee** - filters by the agents assigned to the ticket.
- **ticket.company** - filters by the company assigned to the ticket.
- **ticket.customer** - filters by customer.
- **ticket.global_status** - filters by the global status.
- **ticket.priority** - filters by the priority that was set on the ticket.
- **ticket.queue** - filters by the queue in which the ticket is created.
- **ticket.service** - filters by the service in which the ticket is created.

- **ticket.status** - filters by the status that was set on the ticket.
- **ticket.ticket_type** - filters by ticket type in which the ticket is created.
- **ticket.ticket.modificationDate** - filters by modification date, all users are taken into account.
- **ticket.ticket.customer_modificationDate** - filters by modification date, all customers are taken into account.
- **ticket.ticket.ticket.agent_modificationDate** - filters by modification date, all agents are taken into account.

The last section when configuring automation is **Actions**. Here you decide what will happen to the ticket when it passes the filter.

To start the configuration you need to press 

button. Then a dropdown menu will appear from which you can select the option you are interested in and then press  button.

Selectable options for event type:

- **Close Tickets** - This option allows you to automatically close tickets.
- **Create Ticket** - This option allows you to create tickets automatically.

Press 

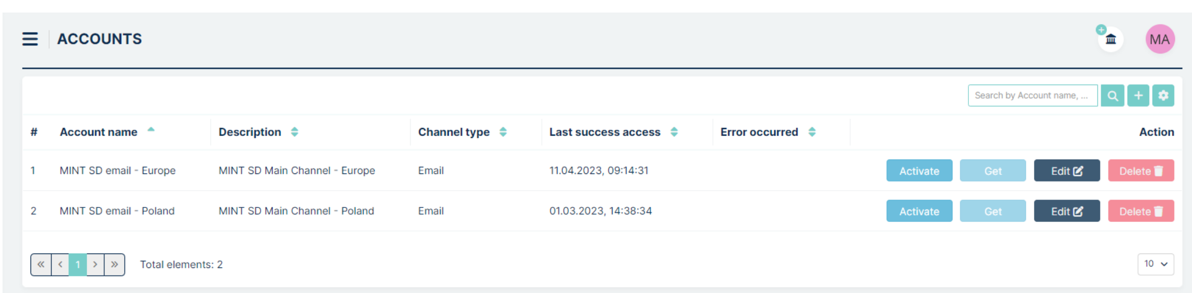
button to complete the automation setup process.

5.13 EMAIL

5.13.1 ACCOUNTS

The 'Accounts' section handles the different communication accounts in the system. Right here you will be able to configure all the email accounts you want to have in the system for incoming and outgoing emails.

All the accounts that have already been configured in the system are displayed on the list.



To add an email account, click the + button located on the right side of the search box.

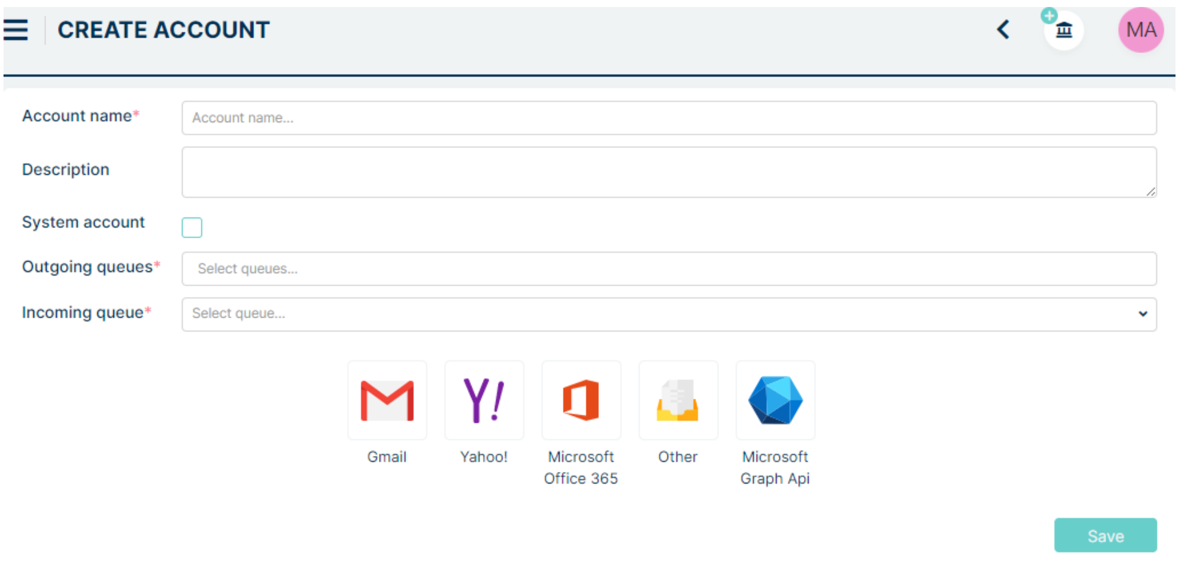
Now, in the 'Create account' view you must fill up the required information: (fields marked with a *).

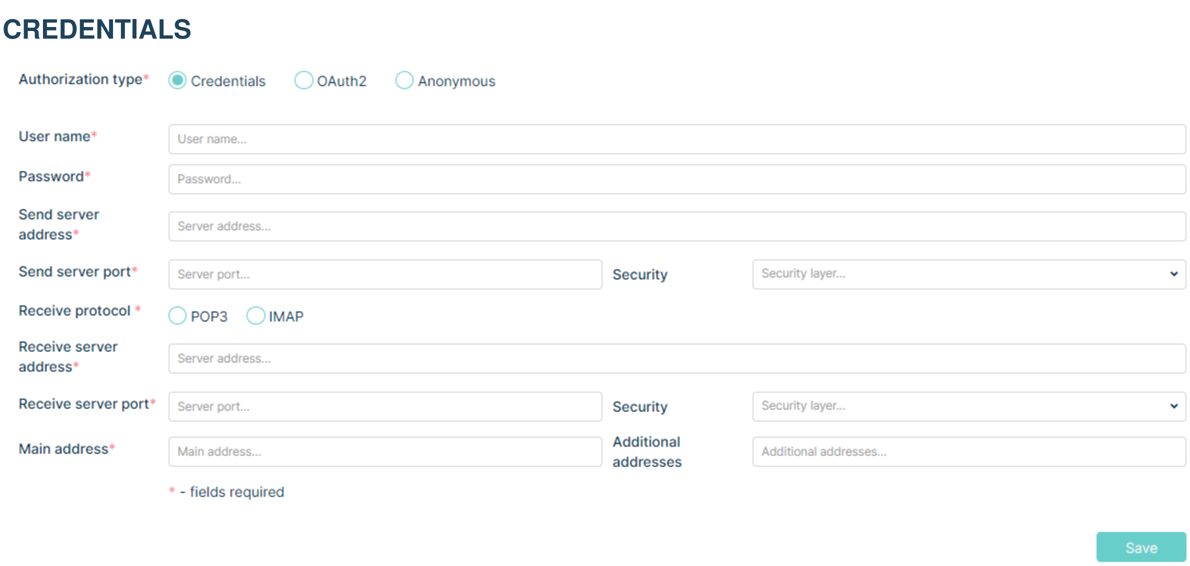
Now you need to select at least one (or more if you want) 'Outgoing queues' – when an Agent writes a message in the Ticket which is in the selected 'Outgoing queues', this email account will be used as a 'Sender' of this message.

Once you selected ‘Outgoing queues’ you need to choose one ‘Incoming queue’ – it means that when a client creates an email and send it to your email address (which will be specified very soon in this part of the guide) the Ticket will be created only in this chosen ‘Incoming queue’.

Now, in the next view, you will need to select which email you’re using. You can choose:

- Gmail
- Yahoo!
- Microsoft Office 365
- Other
- Microsoft Graph Api



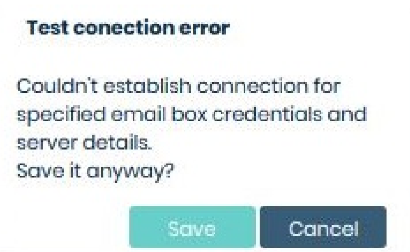


Once you do that, fill up the necessary information – it might require some technical knowledge so if you’re having some trouble here please contact your IT admin for some assistance or write to us: *support@mintsd.com*.

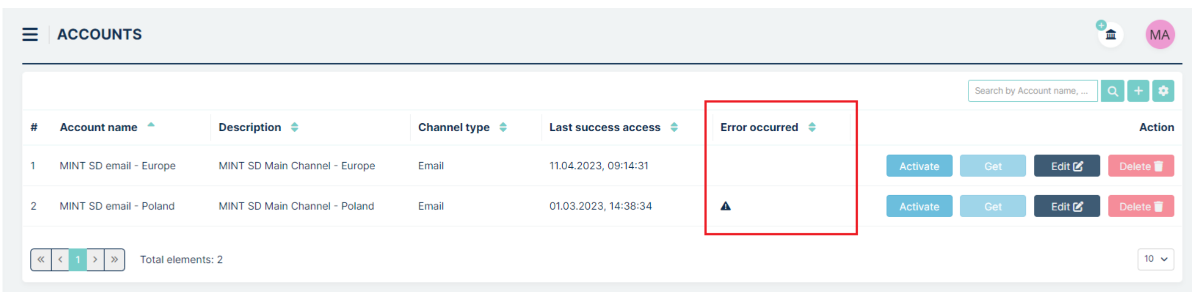
Once you finish, click on the  button to finish the process and save the new email account.

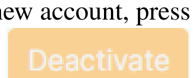
You will be moved to the list of existing accounts, where you will see a new position with some information about your new email account.

However, if you made any mistake with the email box details (server addresses, protocols, security settings) you might receive the following error message.



Of course, you can click the  button and save this account, however, it will not work properly. It that case you need to contact your IT admin and ask for assistance. Until you fix the problem you will also see an additional warning icon  on the list (in the 'Error occurred' column).



To activate your new account, press the  button. If for some reason you want to deactivate it, you can easily do it, using  button.

Once you have a working email account added to the system you can use the  button in order to manually force the retrieval of messages from this email box.

Those messages will be placed in the 'Messages' section (placed in Logs tab) , where you will be able to browse through them.

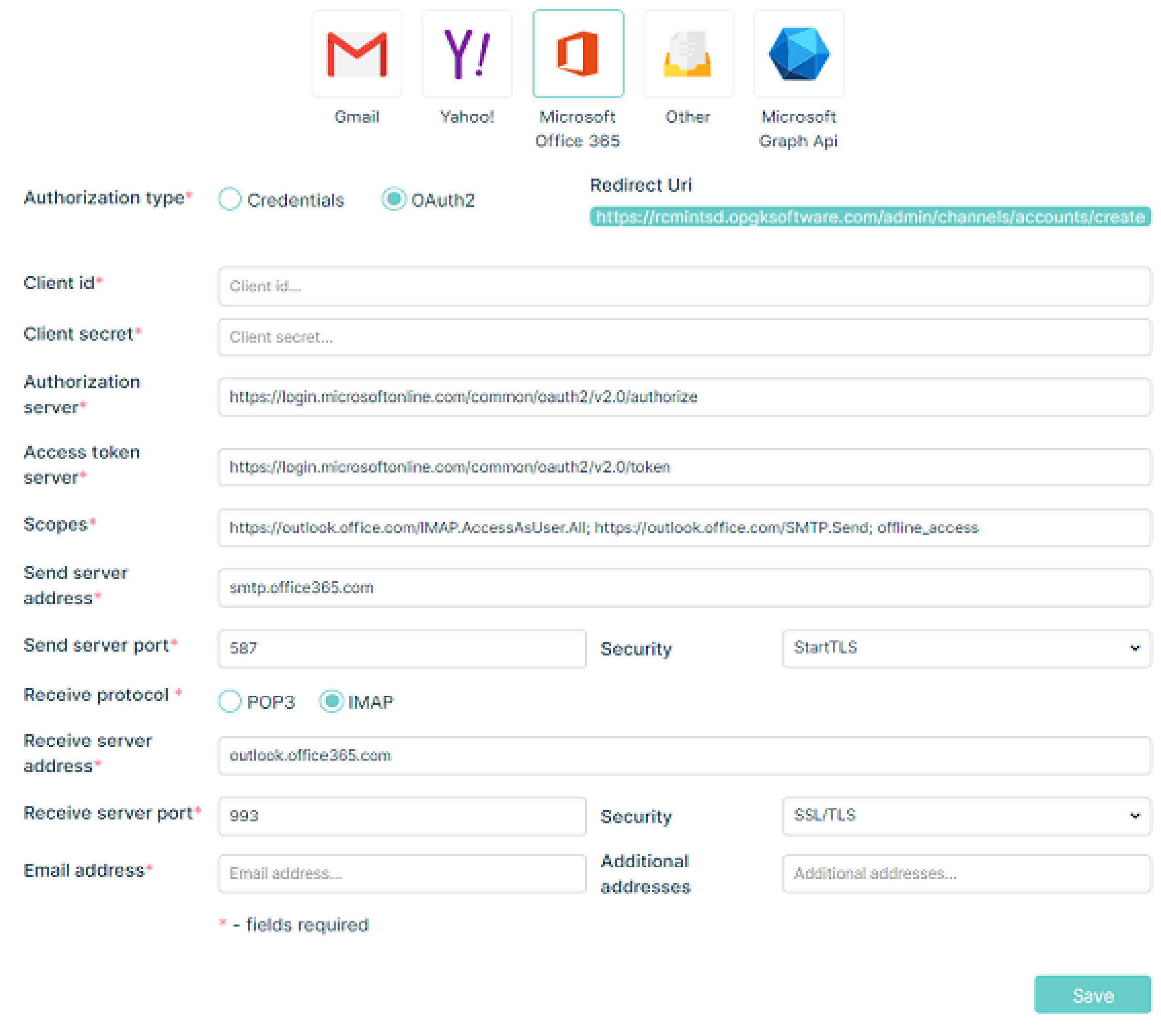
If you want to edit an already existing email box, or just delete it, use the  or  button, located in the 'Action' column of the 'Accounts' view.

OAUTH2

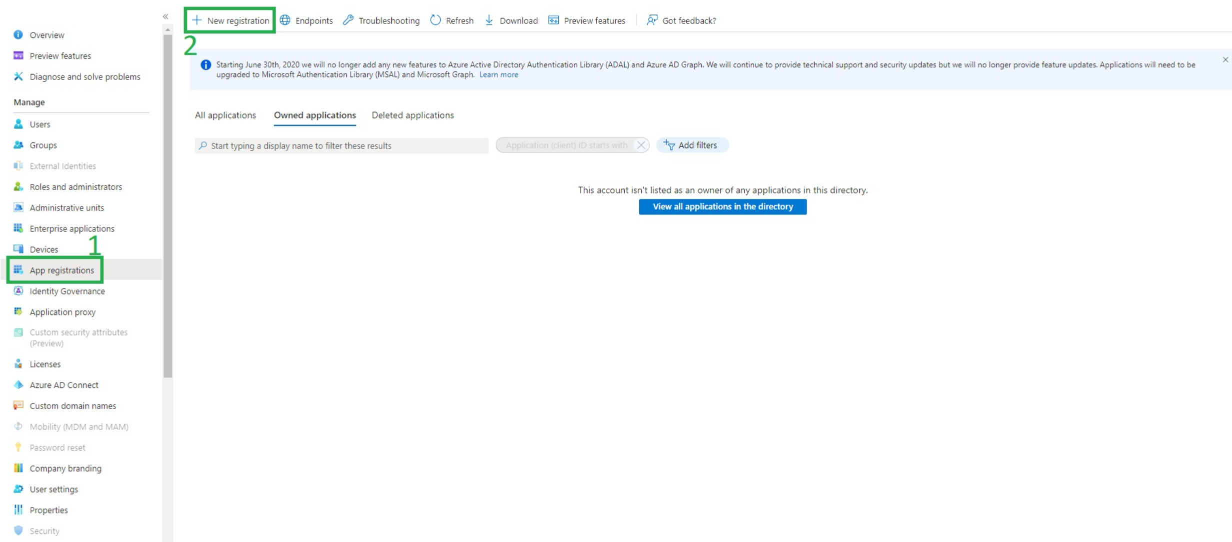
To connect to an email account using OAuth2, select 'OAuth2' in the 'Authoirization type' section.

Depending on the previously selected operator, the data will be filled in accordingly (if the 'Other' option is selected, the user must enter all the data himself).

The example configuration will be performed on 'Office 365'.

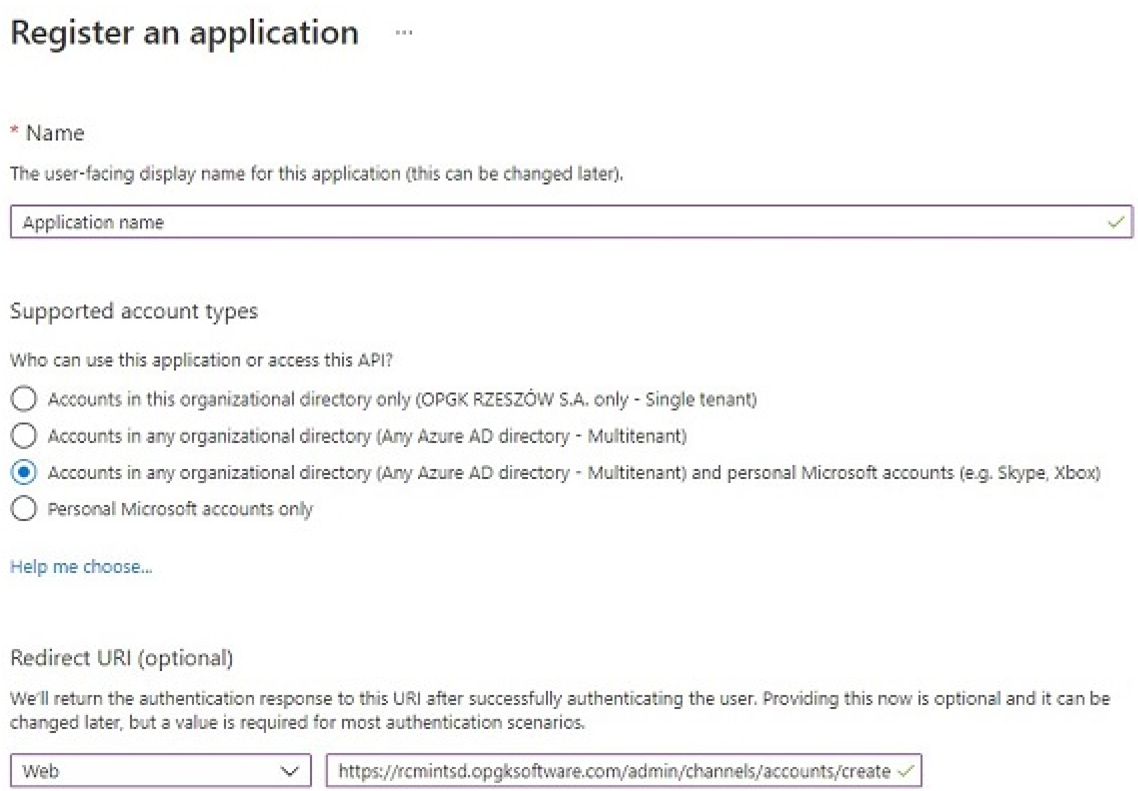


To begin configuration, the user must register the application. To do this, go to 'https://portal.azure.com/' and then log in to your account. When the login process is successful, select 'App registrations' from the left menu. When the window opens click on 'New registration'.

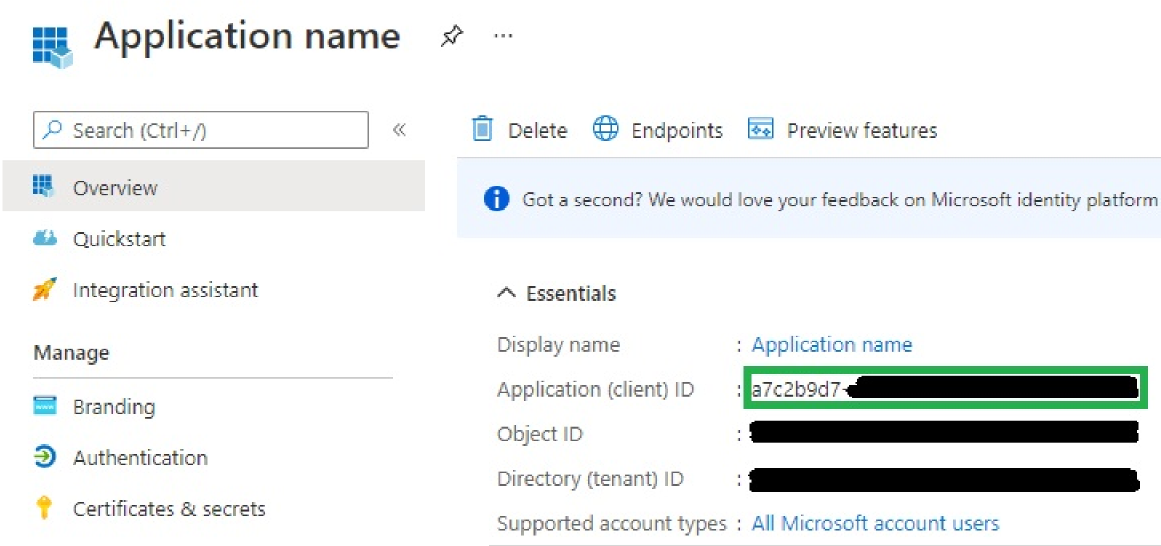


In order to configure your application correctly, you must first enter an application name. Then in the 'Supported account types' section select 'Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)' and in the 'Redirect URI (optional)' section select 'Web' and paste the Redirect Uri from the email account creation page.

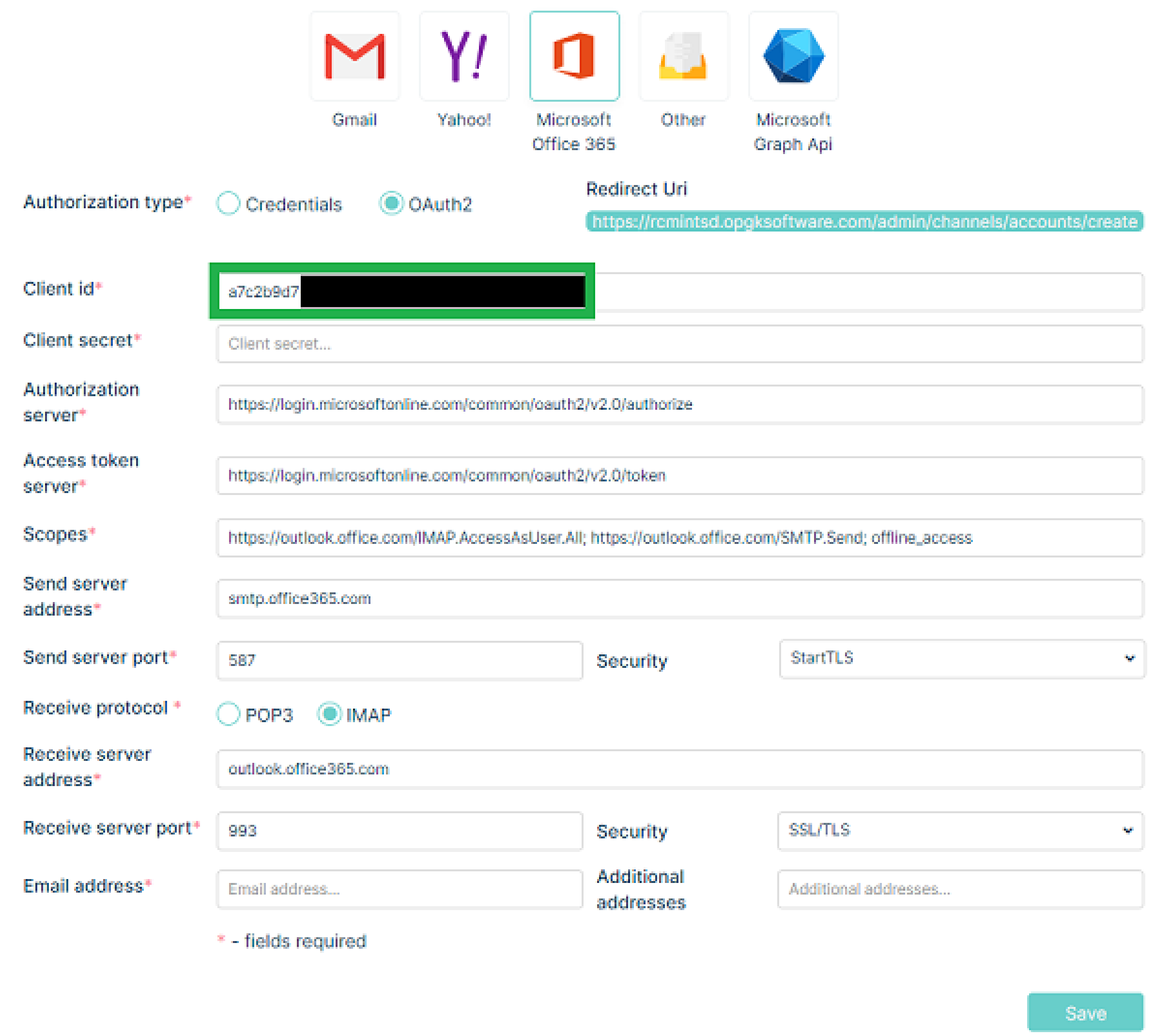
Then you need to press the 'Register' button.



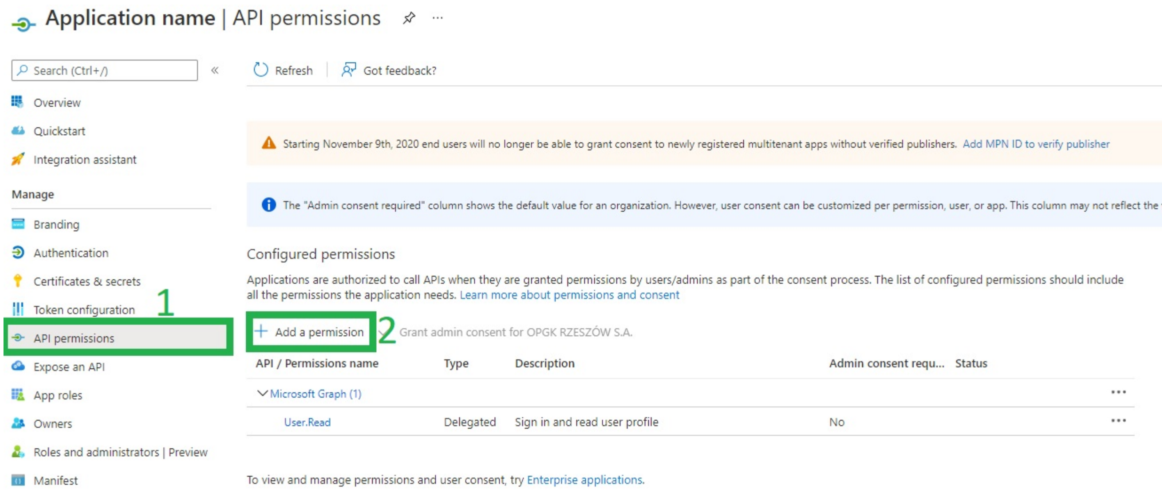
Once the button is pressed and the new application is successfully registered, the user will be taken to a summary page where he/she must copy the 'Application (client) ID'



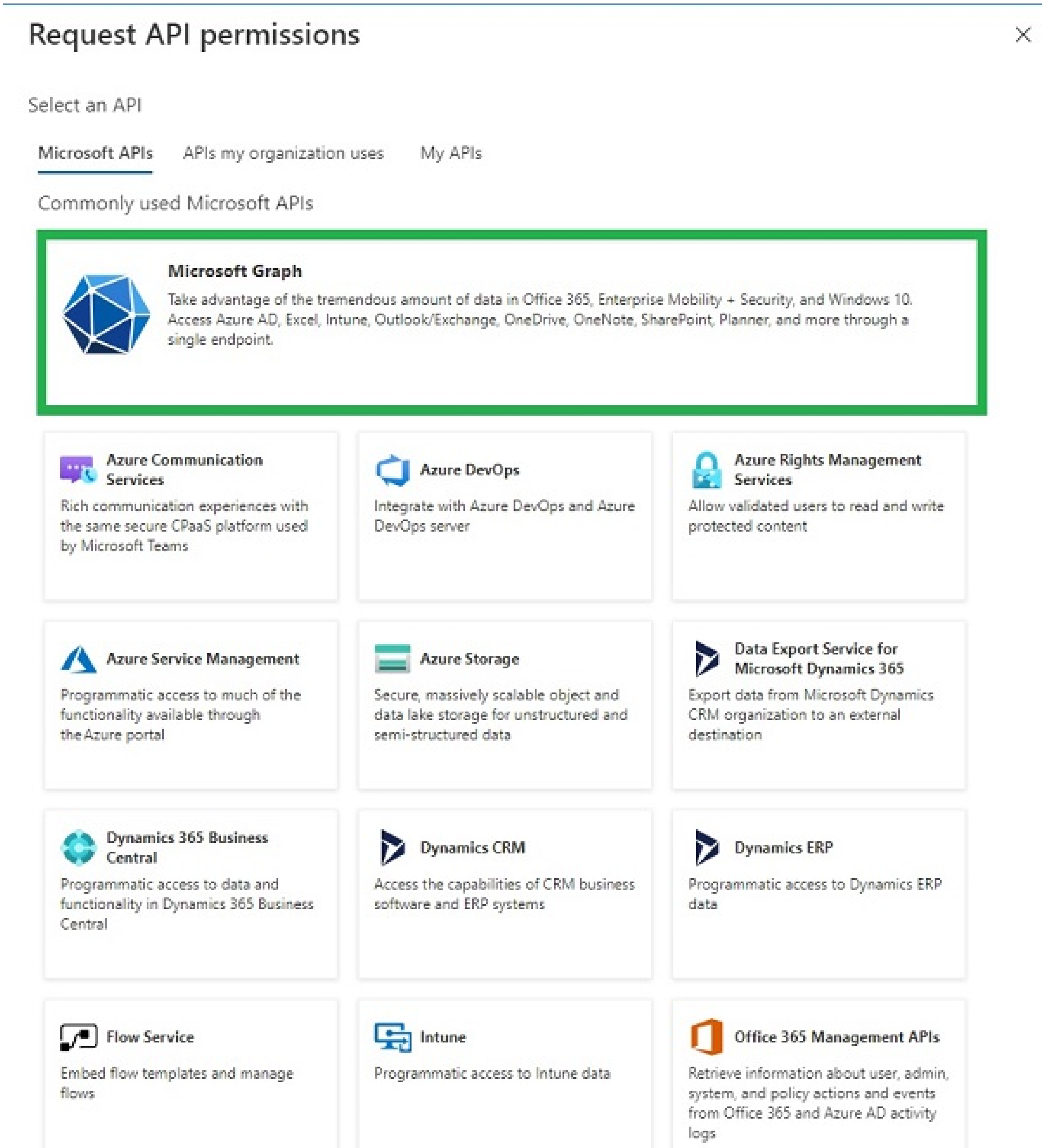
The copied code, the user must paste into the mint configuration in the 'Client id' field.



The next step is to add permissions. To do this, the user must press the 'API permissions' option on the sidebar and then select 'Add a permission' on this window.

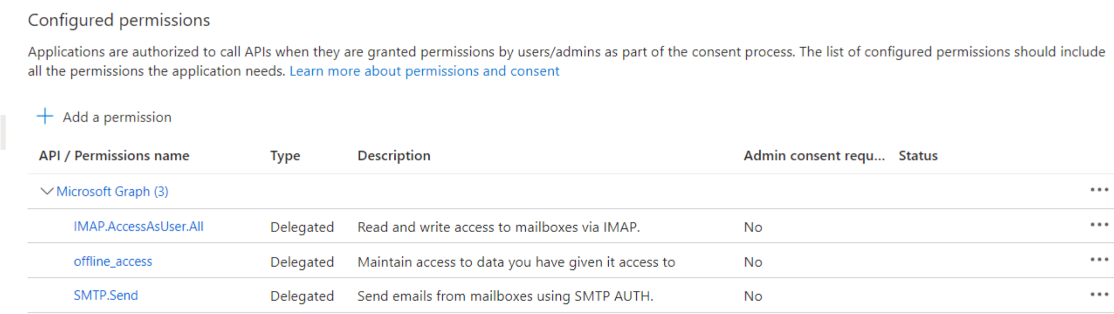


After pressing the button, press the 'Microsoft Graph' option.

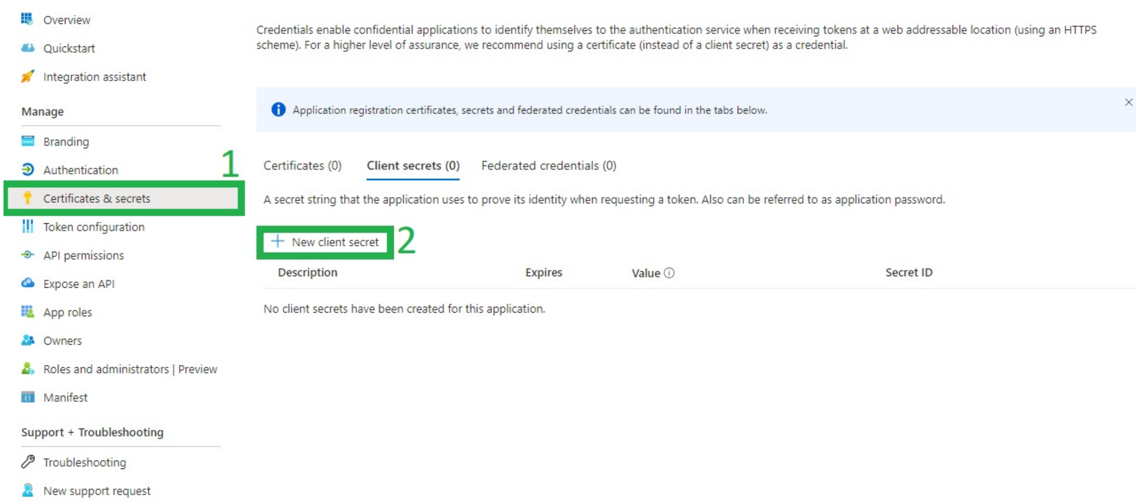


Select 'Delegated permissions' and check these options: - IMAP.AccessAsUser.All - SMTP.Send - offline_access

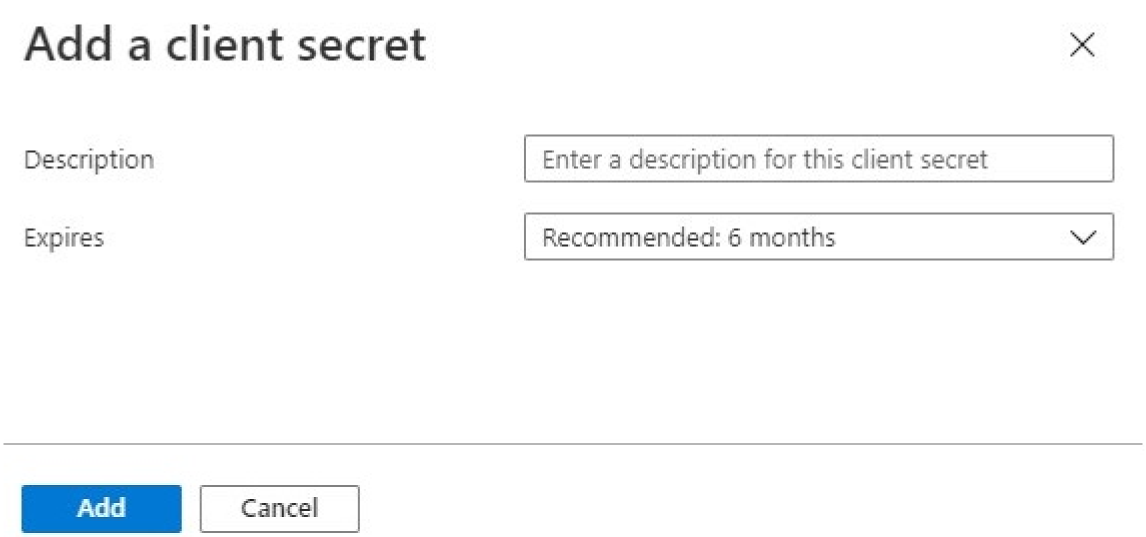
And then press the 'Add permissions' button.



The next step is to go to 'Certificates & secrets' which is located on the left sidebar. Then you need to press the 'New client secret' button.

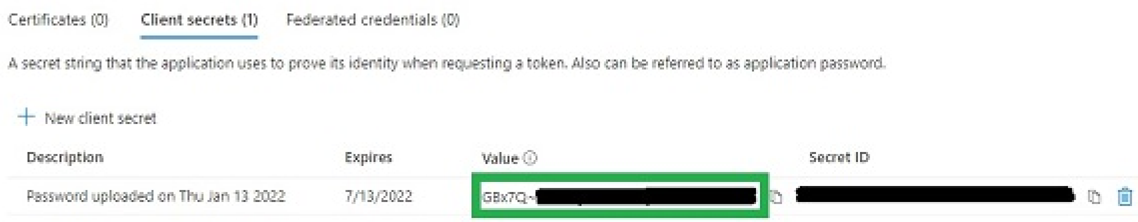


Add a description and press the 'Add' button.

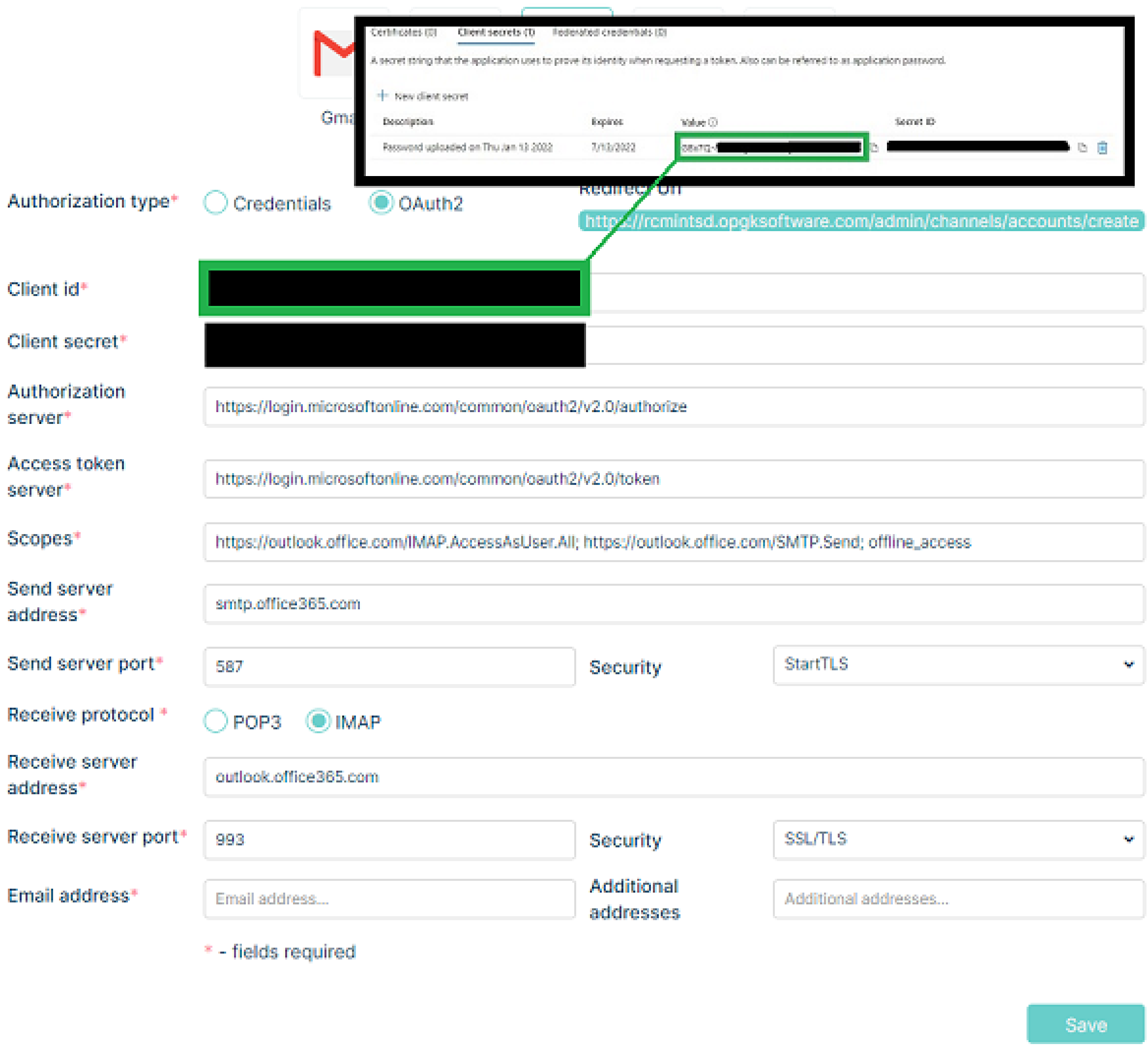


Remember to enable SMTP Authentication. More information at this link: https://docs.microsoft.com/en-us/exchange/clients-and-mobile-in-exchange-online/authenticated-client-smtp-submission

The user will be taken to the summary. Remember to copy the 'Value' field because when you refresh the page, this field will be hidden.



The copied value should be pasted into the MINT configuration in the 'Client secret' field.



To complete the configuration of MINT, select 'IMAP' in 'Receive protocol' and in the 'Email address' field enter the Microsoft Office 365 address from which the configuration was performed.

To complete the configuration process, press the 'Save' button. After pressing it the user will be redirected to Outlook login form. If all the information is correct, the system should connect to Microsoft Office 365 via OAuth2.

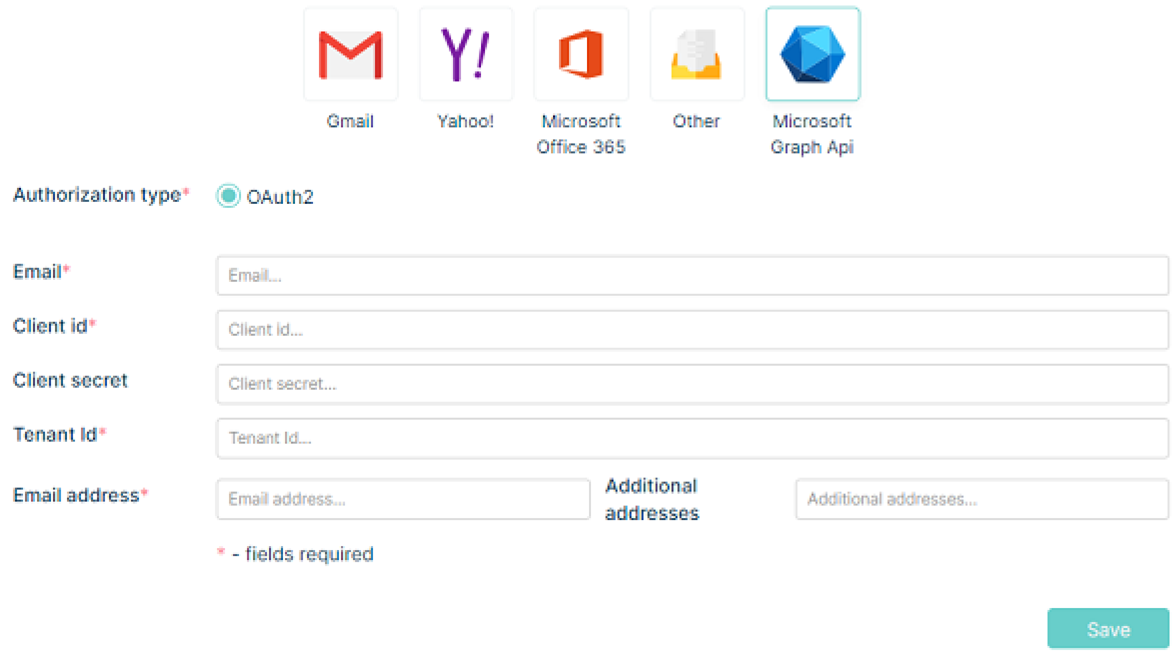
Please notice, that after saving your settings, the Redirect URL has changed from 'create' endpoint to 'edit' with specific UUID. It is nesessary to add this additional redirect URL to your settings in Azure portal (or any other portal you are using to configure OAUTH2 connection)

The sample Redirect URL can look like this below:

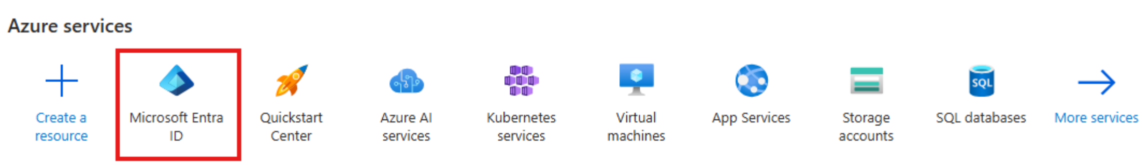
Note: Keep in mind that some OAuth2 providers only allow you to generate one refresh token per config. Because of this restriction, you may get an error that you cannot connect to the mailbox. In this case, review the documentation of the provider you are using.

MICROSOFT GRAPH API

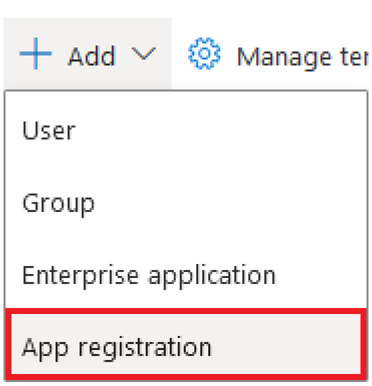
After pressing this button, a form will pop up:



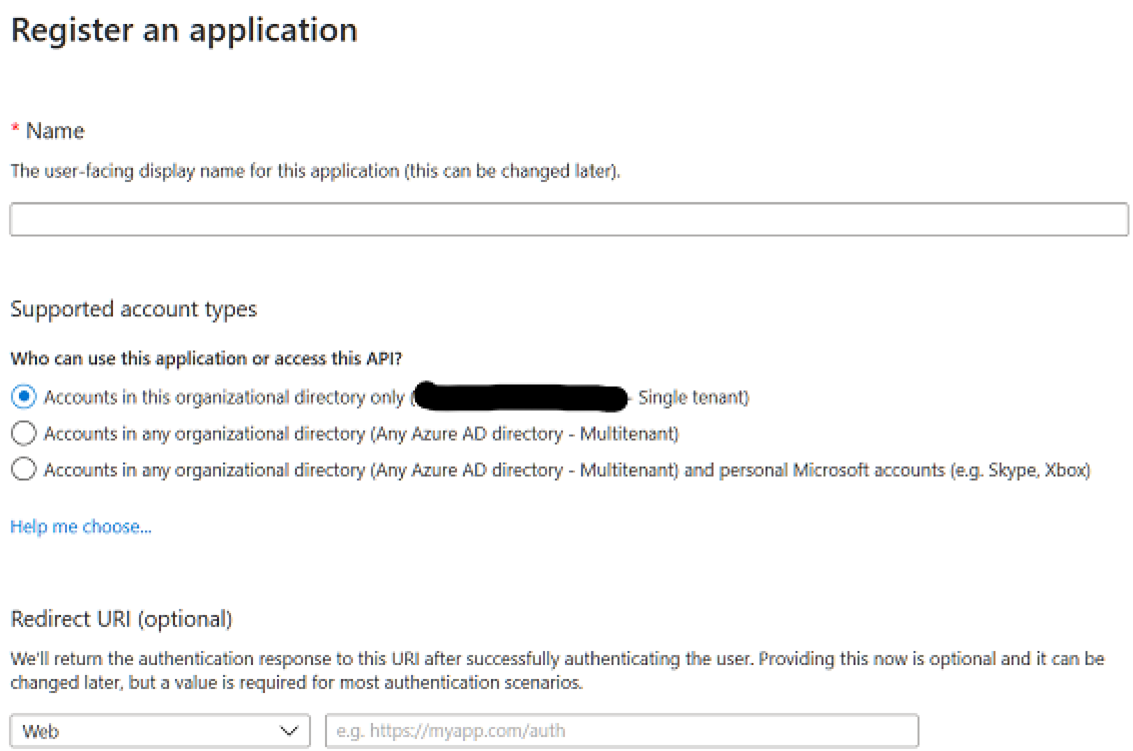
First go to https://portal.azure.com Sign in and go to **Microsoft Entra ID** services.



Go to "App" and 'App registration'



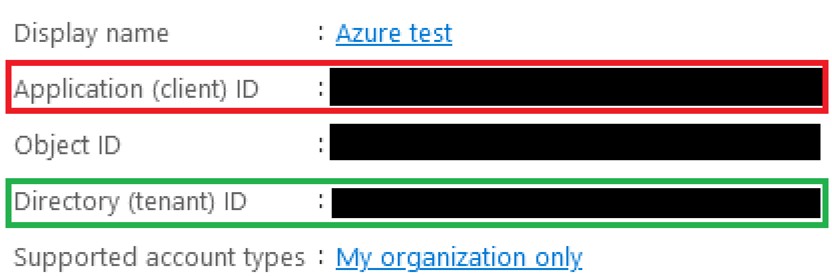
The following form will appear.



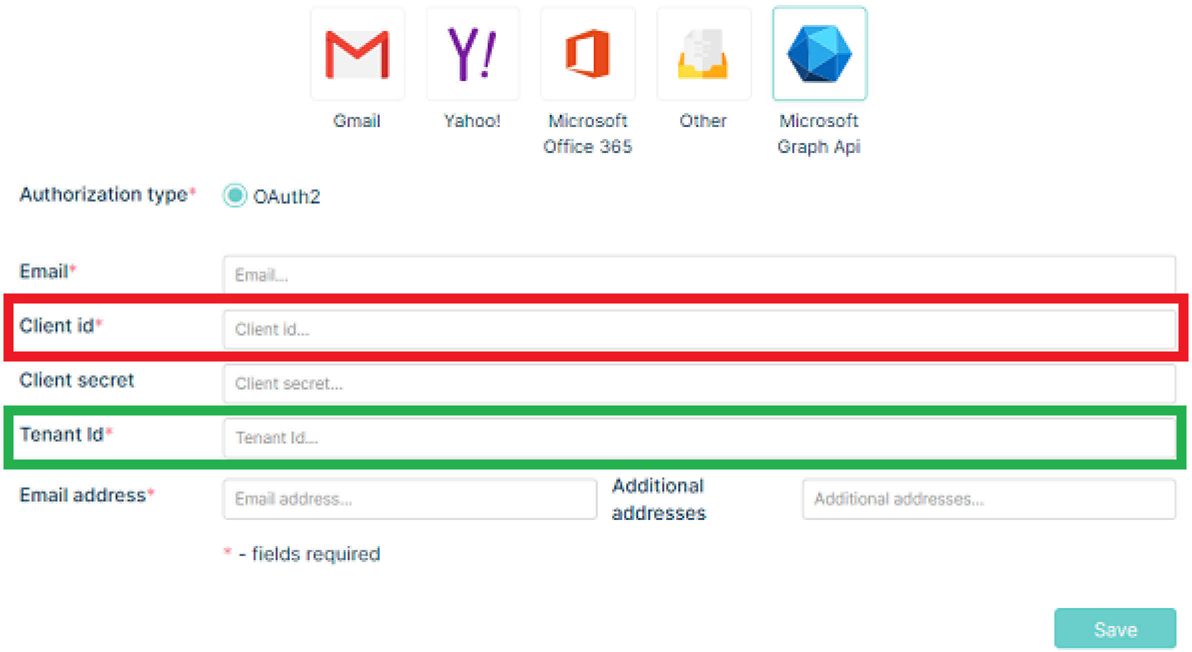
Now fill up the form:

- in 'Name' field type your preferred name
- 'Supported Account Types': leave it as it is
- 'Redirect URL': Select "Web" option.

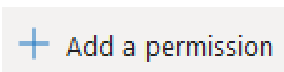
Copy Application (client) ID and Directory (tenant) ID



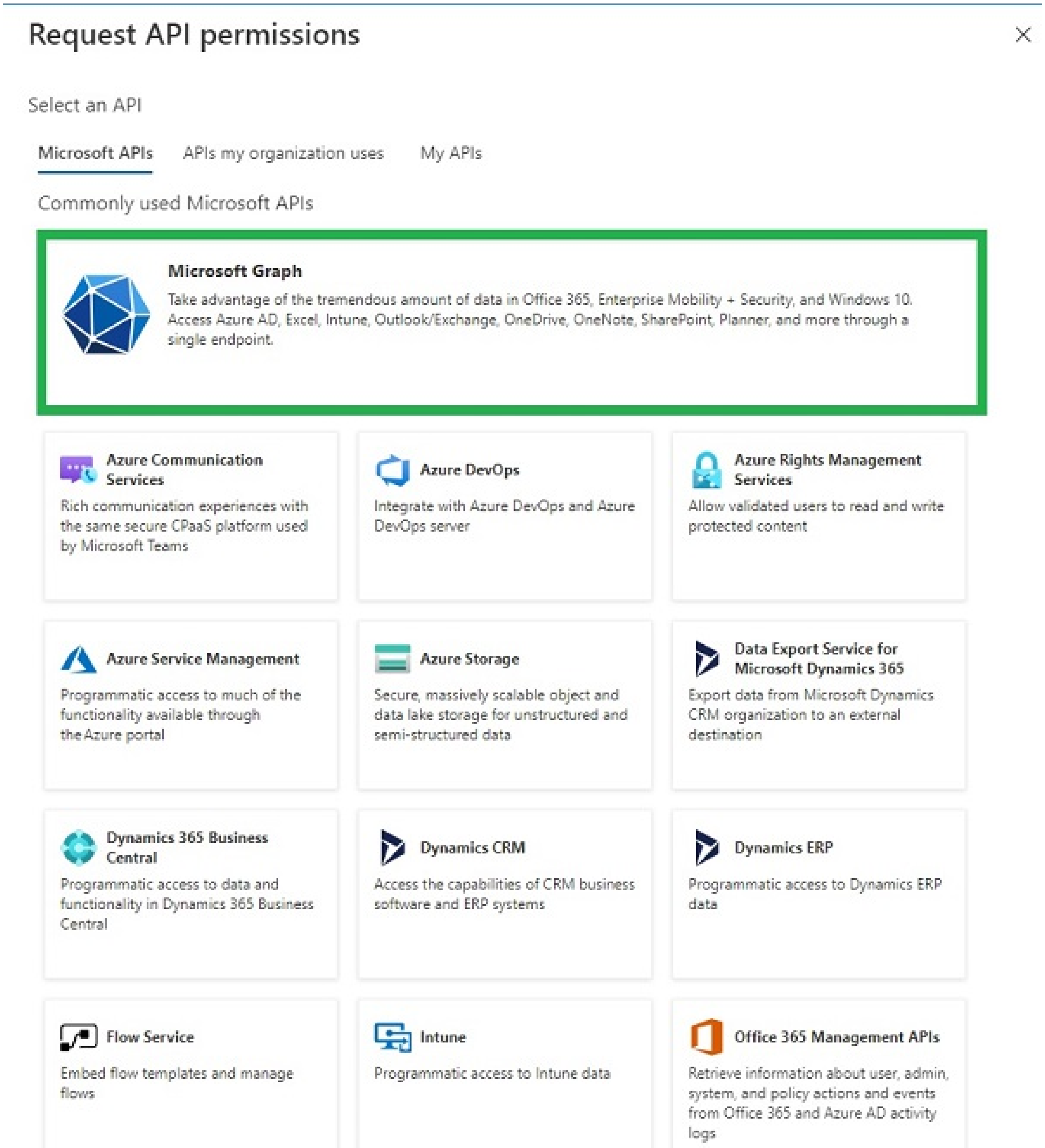
Paste them here:



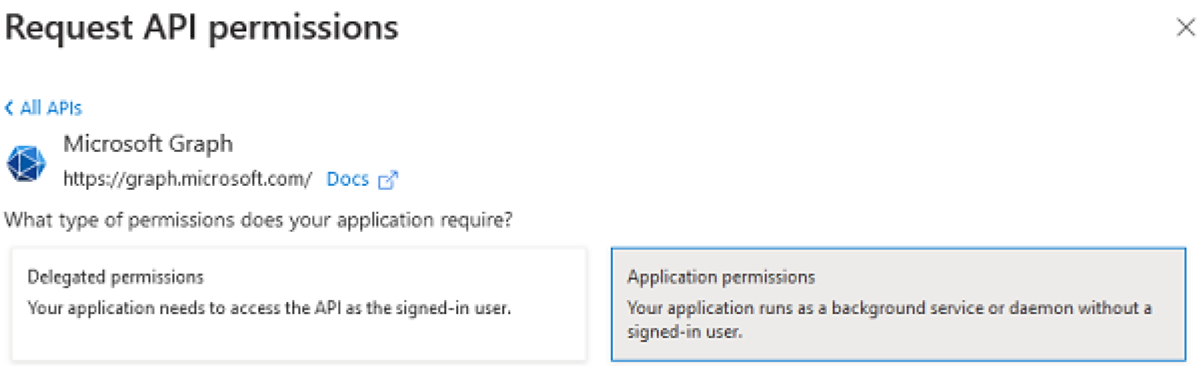
After the registration go to the **API permissions** tab

Press the 

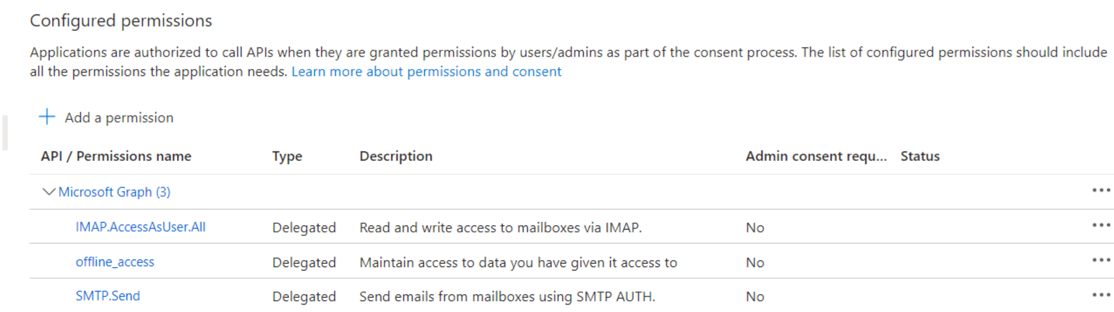
button. Then, from the window that slides out on the right side of the screen, select the "Microsoft Graph" option.



From the two available options, select the one on the right - Application permissions



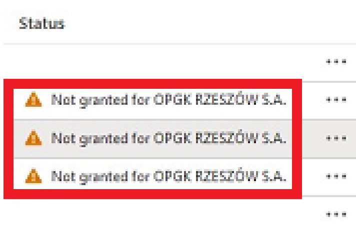
In the Mail section, select the following options:



To save the rights, press the 

button.

There is a possibility that you will encounter such a situation:



Domain administrator approval is required to grant permissions (read, write, send). It is recommended that domain administrators narrow Graph application access to only the required email addresses. By default, permissions will be granted to the entire domain (for each email address in the domain).

To configure an application access policy and limit the scope of application permissions:

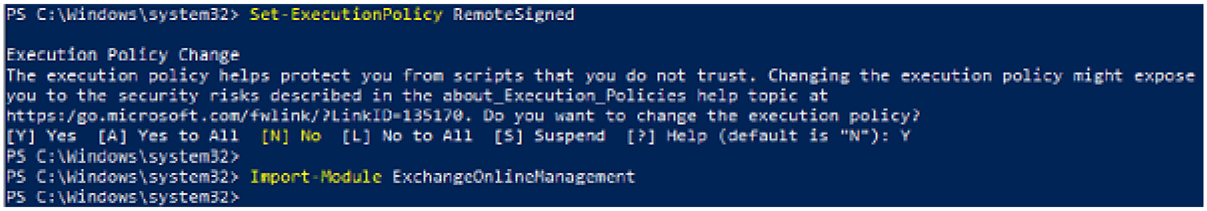
Connect to Exchange Online PowerShell:

- To require all PowerShell scripts that you download from the internet are signed by a trusted publisher, run the following command in an elevated Windows PowerShell window (a WindowsPowerShell window you open by selecting Run as administrator)

Set-ExecutionPolicy RemoteSigned

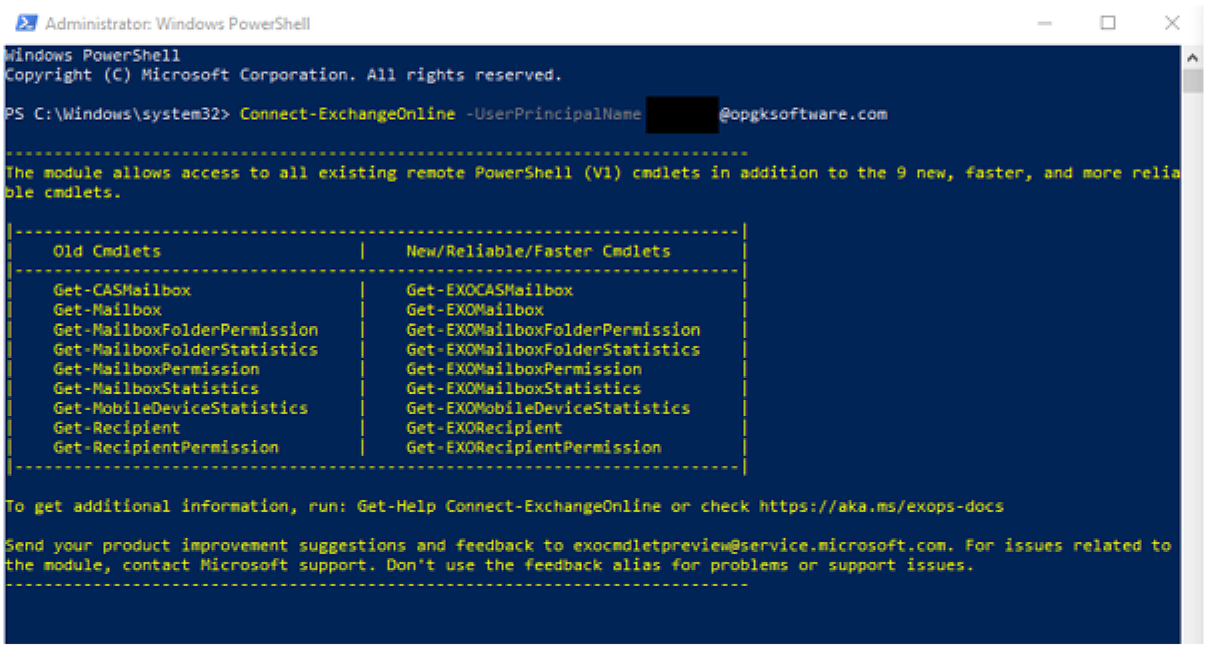
- Install 'ExchangeOnlineManagement' tool for managing the Exchange Online Services

Install-Module -Name ExchangeOnlineManagement



- Login to the Exchange Online Powershell (a login pop-up will prompt out)

Connect-ExchangeOnline -UserPrincipalName {your-admin-account@your-domain.com}



Identify the app's client ID and a mail-enabled security group to restrict the app's access to. Identify the app's application (client) ID in the Azure app registration portal. Create a new mail-enabled security group or use an existing one and identify the email address for the group:

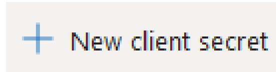
- You must have Microsoft 365 admin permissions to access the Exchange admin center. For more information, see Permissions in Exchange Online.
- sign in to Microsoft 365 or Office 365 using your work or school account, and then choose the Admin tile.
- In the Microsoft 365 admin center, choose Admin centers > Exchange.
- In the EAC, navigate to Recipients > Groups.
- Click New > Security groups and fill all necessary fields.

Create an application access policy.

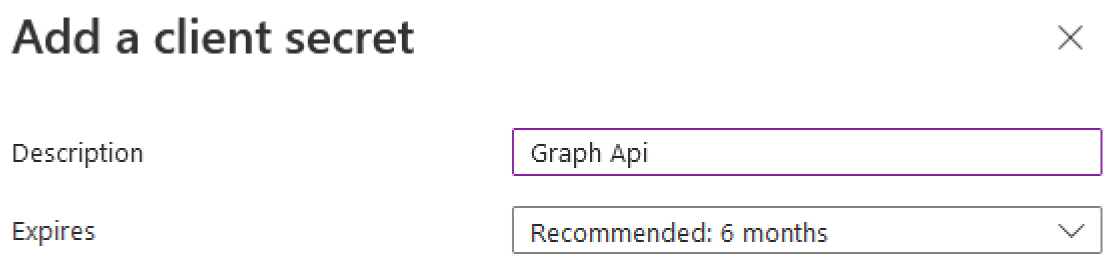
- Run the following command, replacing the AppId, PolicyScopeGroupId, and Description arguments
- New-ApplicationAccessPolicy -AppId e7e4dbfc-046f-4074-9b3b 2ae8f144f59b -PolicyScopeGroupId EvenUsers@contoso.com -AccessRight RestrictAccess -Description "Restrict this app to members of distribution group EvenUsers."

Note: Changes to application access policies can take more than 1 hour to take effect in Microsoft Graph REST API calls.

Then go to the **Certificates & secrets** section.

Once you are in this section press the  button.

In the box that slides out on the left in the **Description** field, enter what value you once can easily find. In the **Expires** field, leave the default value (6 months) or change it to whatever you think.

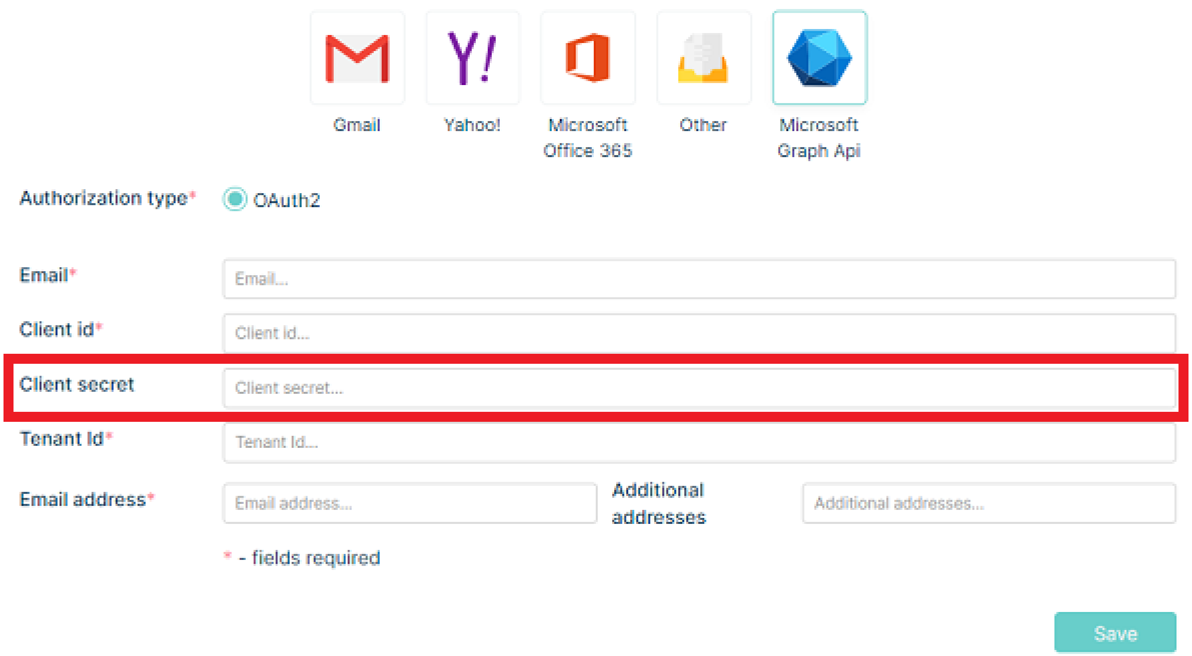


To approve the operation press the  button.

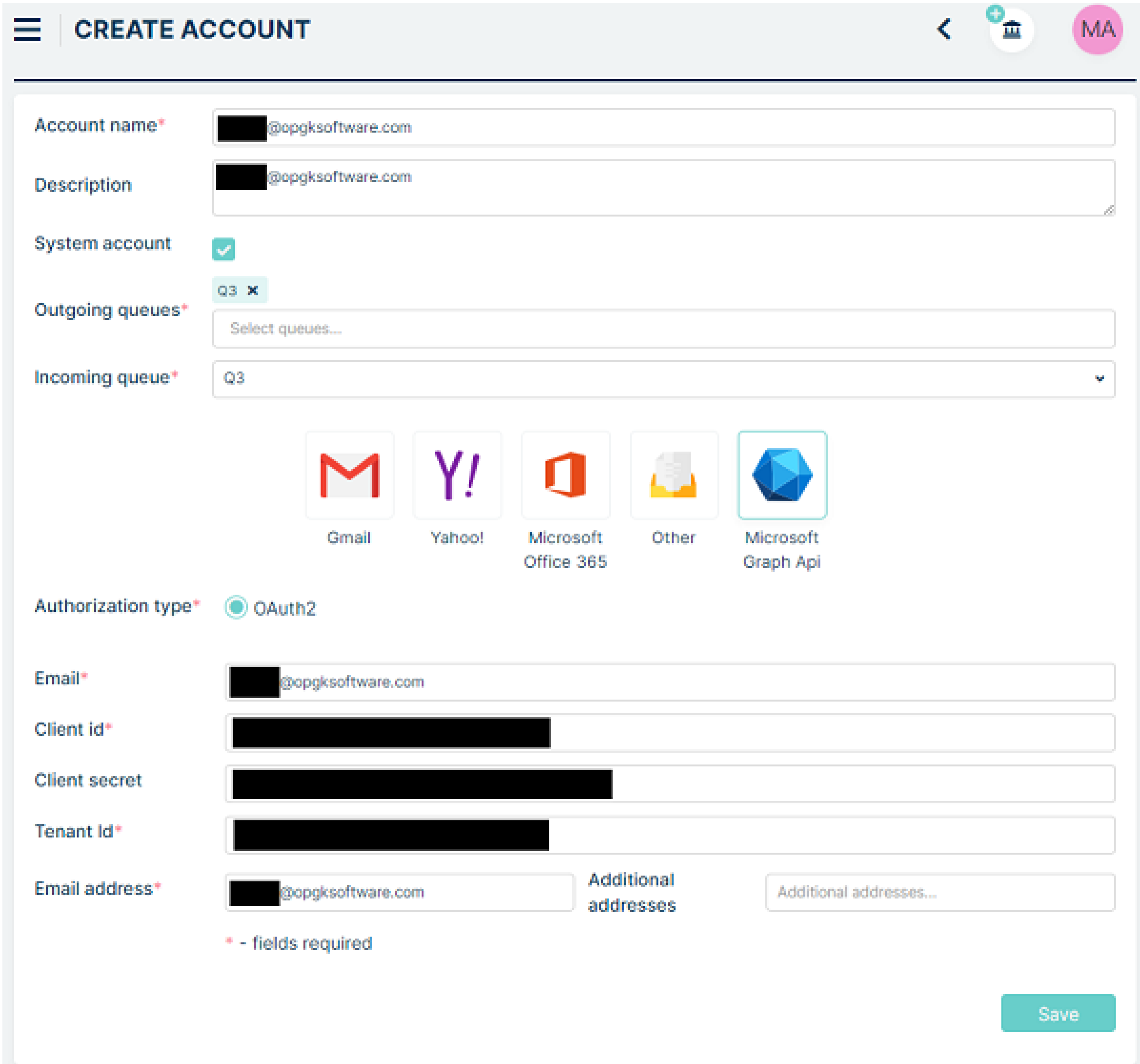
After saving, copy **Value**.

Client secret values cannot be viewed, except for immediately after creation. Be sure to save the secret when created before leaving the page.

Paste the copied value into MINT in the **Client secret** section



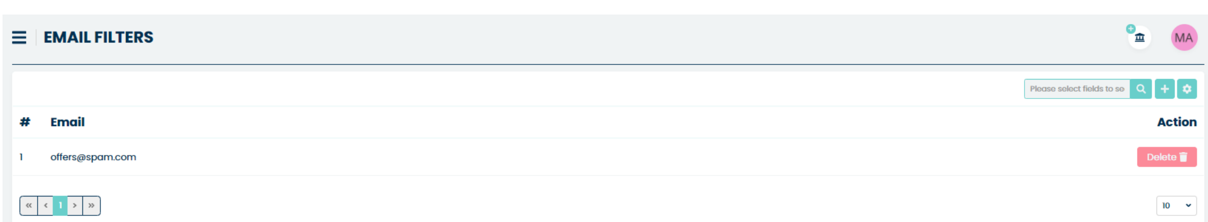
The configuration should look similar to this:



To save the mailbox configuration press the  button.

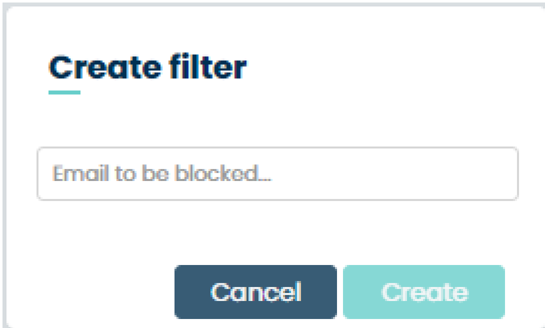
5.13.2 EMAIL FILTERS

The main purpose of this section is to allow you to create a list of emails, from which you will not be receiving any messages. Those email addresses will be blocked.



Adding a new address to the list is very simple. Just click the + button located on the right side of the main view.

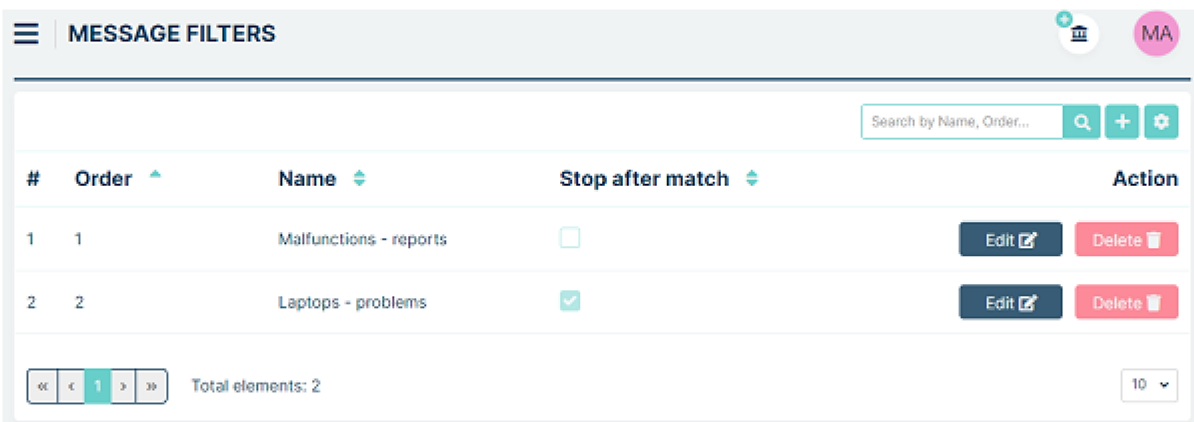
After you do that small pop-up window will appear asking you to type the address to be blocked.



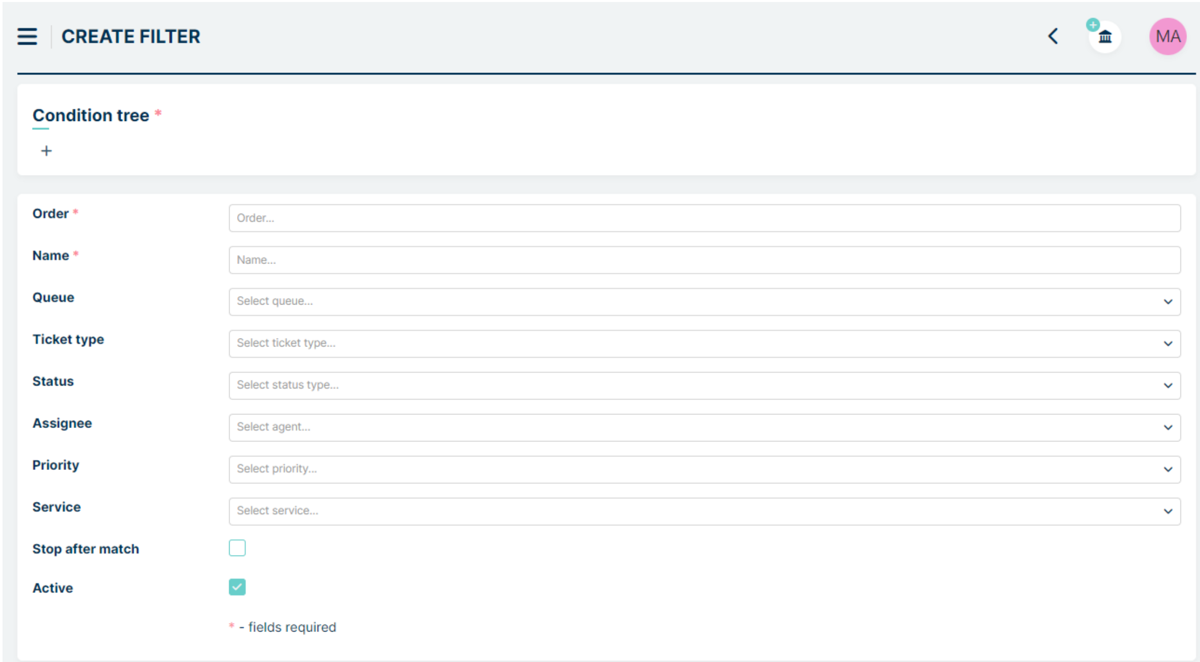
Type the address and click 'Create'. You will see a new position with this address on the general list.

5.13.3 MESSAGE FILTERS

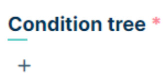
In this section, you can create as many filters for incoming messages as you need. They are needed to filter the incoming email text and e.g., create Tickets (from incoming email) in the right queue or to assign those Tickets a correct Ticket Type, once the specified conditions had been fulfilled.



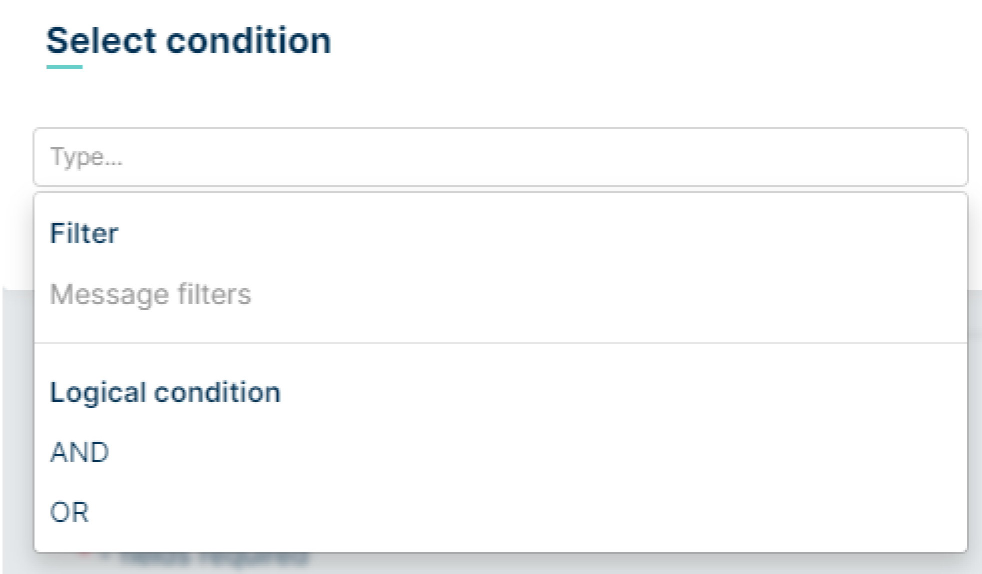
To create a new message filter, click the  button located on the right side, next to the search field. You will be moved to the 'Create filter' form.



First, click on + button located below "Condition tree".

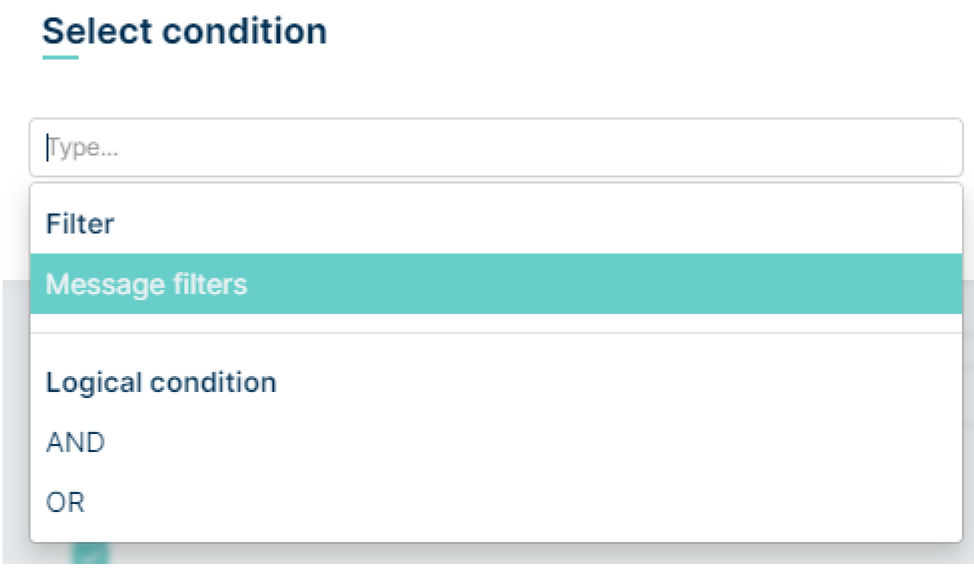


In new modal window select type of condition you want to include.

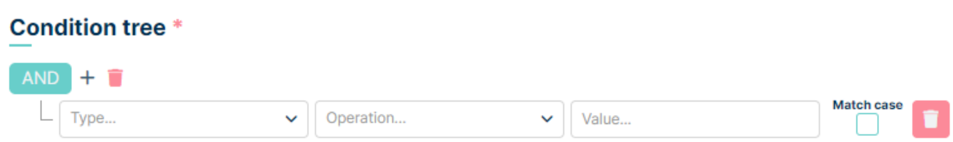


As first step you can choose only from "Logical condition" part (AND, OR) - choose option you need and press "Save".

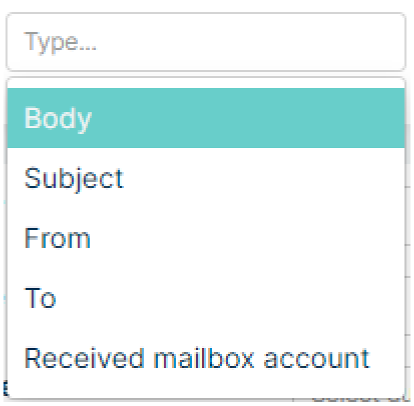
Now click on + button once again and select another condition. Let's select "Message filters" and save.



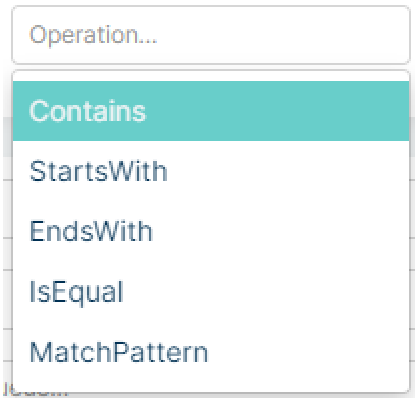
Now you can see fields: Type, Operation, Value



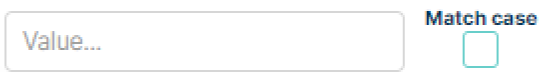
Select "Type" - it is the part of the email you want to filter. You can choose between 'Body', 'Subject', From', 'To' and 'Received mailbox account'.



Now, choose one 'Operation' – it includes options to get the match and fit of your filters like: "Contains", "StartsWith", "EndsWith", "IsEqual" and "MatchPattern".



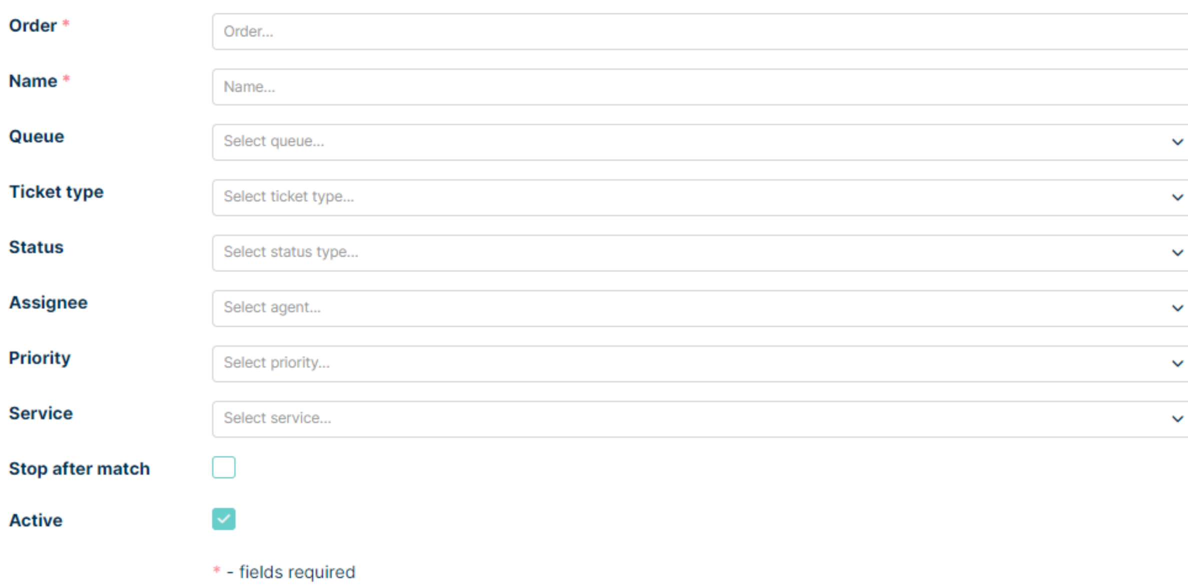
The "Value" is the field where you must put which value exactly you want to match. You can type anything you want here.



For each of the criteria, you can select the 'Match case' check-box. It is related to the 'Stop after match' option mentioned before.

If you want to add additional criteria you can use the  button again. If you want to delete any condition, just use the  button.

Below this panel is a panel that responds to what should happen to the submission after matching.



Right here you need to name your filter ('Name'). You can select the 'Queue' in which a Ticket will be created (from the email message sent). You can also specify the 'Ticket type' which will be added to the created Ticket (from the email message). Other fields that can be configured are: 'Status', 'Assignee', 'Priority', 'Service'. Configuring these fields will set the wanted fields after matching.

Next, you can select the check-box 'Stop after match'. Check it if you want to match one (or more) of the criteria you are creating (those with additional 'Match case' check-box selected by you). If you want to match all the criteria, leave this option unchecked.

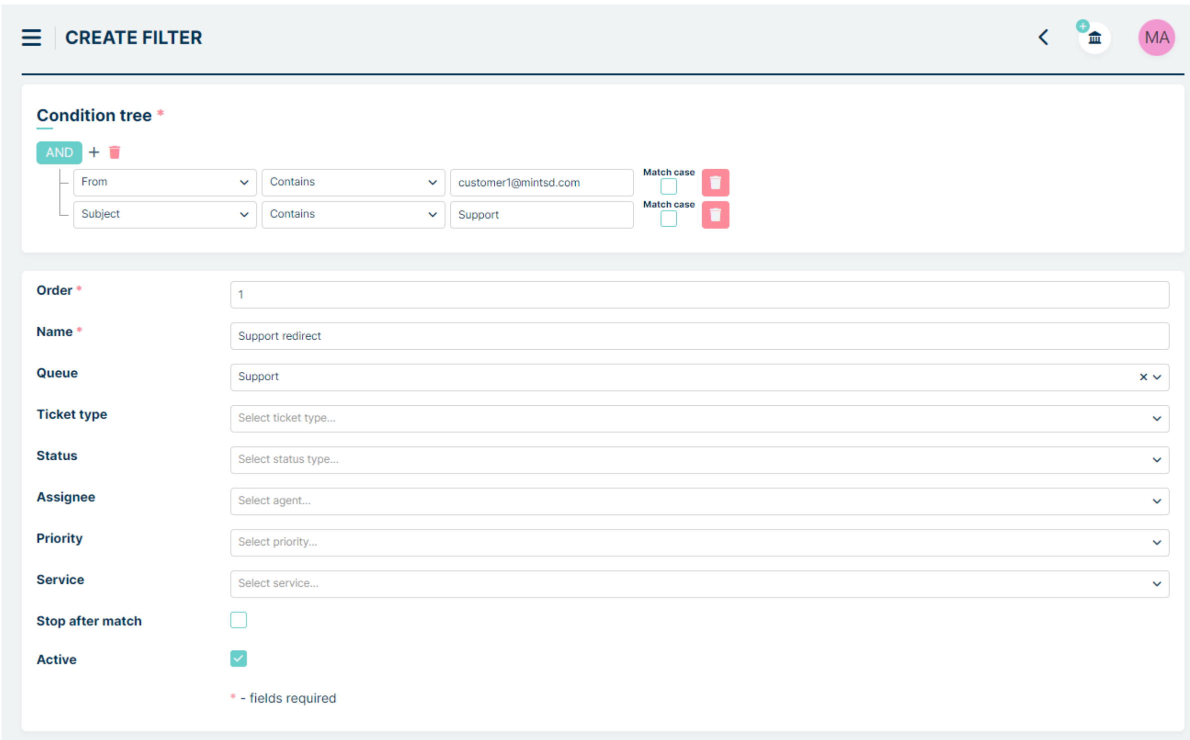
At the bottom there is ‘Active’ checkbox, where you can decide, if your filter should be active or not. You can always change it by edit message filter.

Once you finish click the 

button in order to save your new message filter.

Let’s create an example configuration for filters. Let’s assume we want all tickets from the email **customer1@mintsd.com** AND with the subject **Support** to be redirected to the **Support** queue.

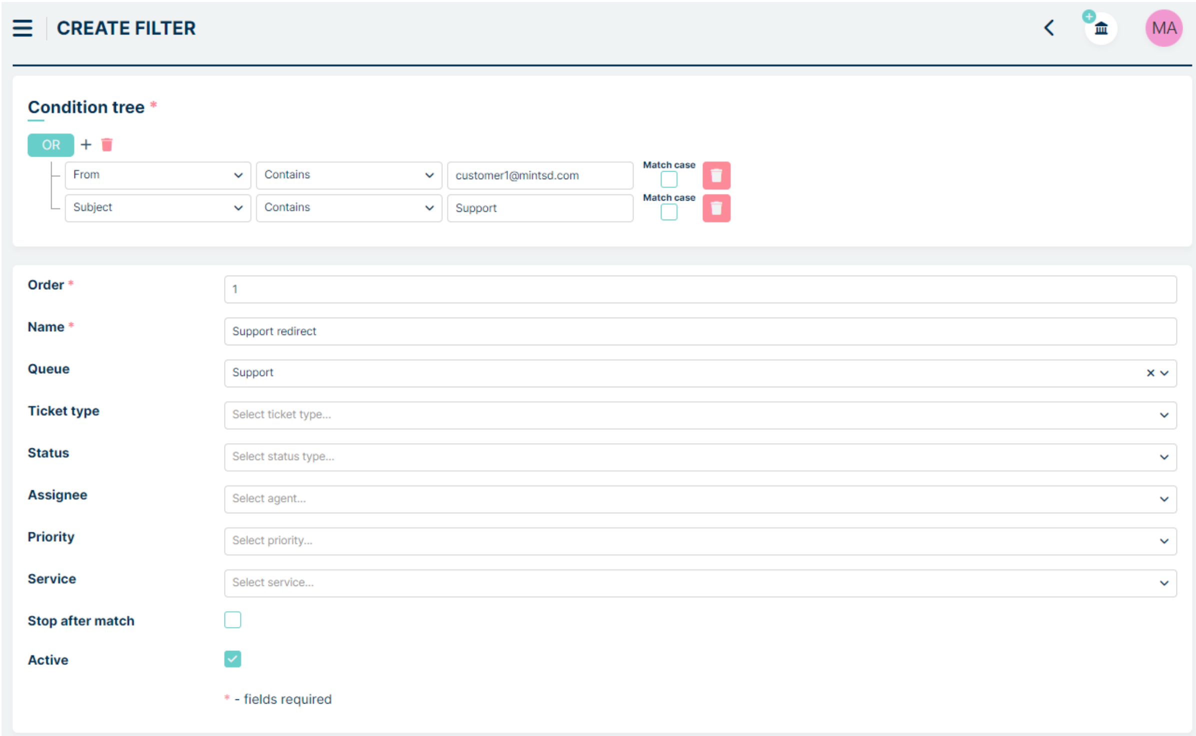
We create the following configuration with the AND condition:



This means that an incoming email must meet both conditions to be redirected to the **Support** queue.

Now, let’s create a configuration where all tickets from the email **customer1@mintsd.com** OR with the subject **Support** are redirected to the **Support** queue.

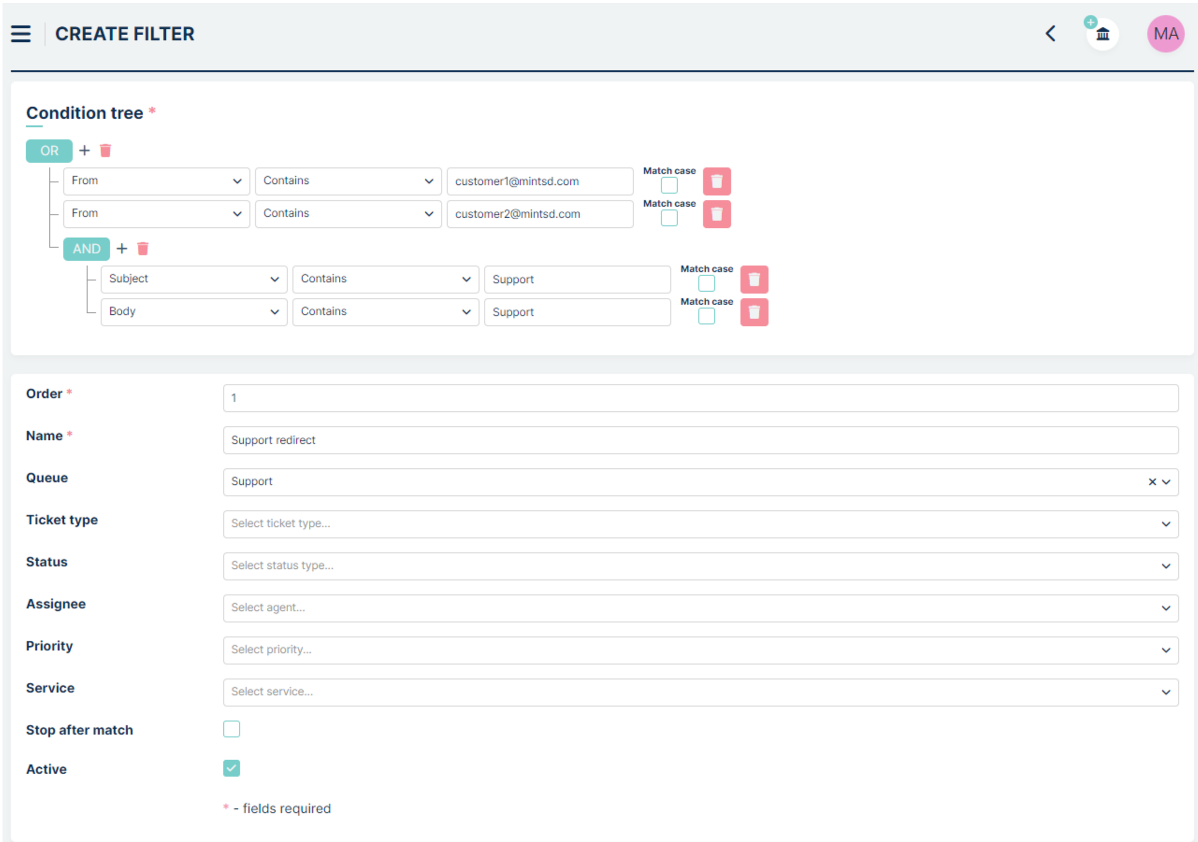
We create the following configuration with the OR condition:



This means that all emails meeting at least one of the above conditions will be redirected to the **Support** queue.

However, let's say we want emails from the inbox **customer1@mintsd.com** or **customer2@mintsd.com** to be redirected to the **Support** queue, but each email must contain the word **Support** both in the subject and in the body of the email.

To achieve this, we create a more complex configuration as shown below:

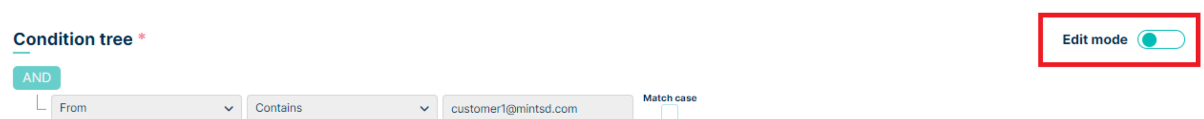


In this way, you can create increasingly complex logical conditions depending on your needs.

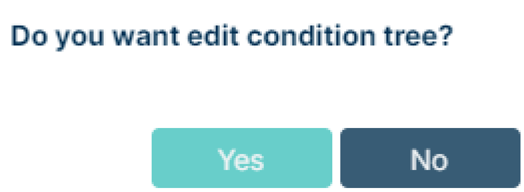
Remember that after creating a new message filter you can always either change anything inside (

button) or even delete it from the system (

button). To make changes to a saved filter in the Condition tree section, you need to click the Edit mode toggle:



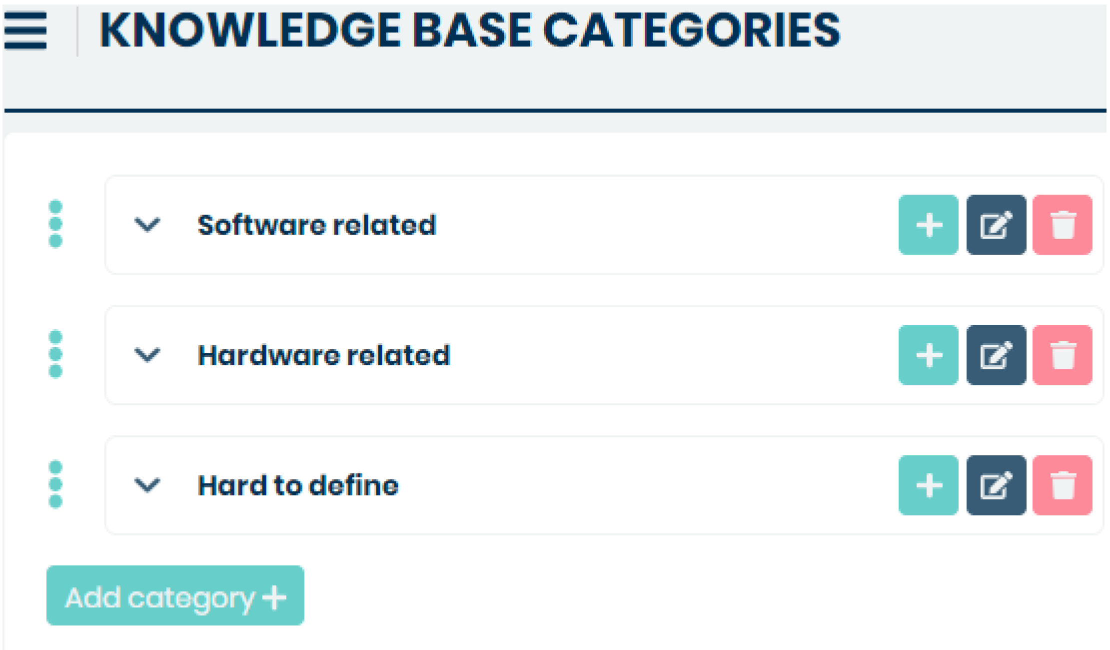
and confirm the desire to edit the filter in the modal like below



5.14 KNOWLEDGE BASE

5.14.1 CATEGORIES

In this section of the system, you can build the structure for Knowledge Base categories that later will be used while creating new Knowledge Base topics or changing the localization of already existing ones.



In the Knowledge Base section (available for Agent and Client on their sidebars) user will find the list of topics along with questions (and their answers) related to them.

If you want to add a new category, simply click on the 

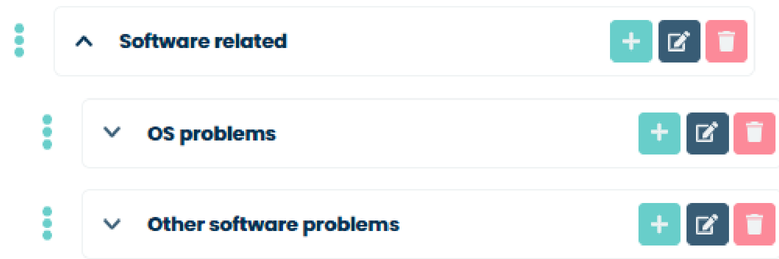
button and a new empty field will appear.

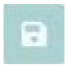
Type the name for the category and either click the  button or confirm the name by pressing ‘Enter’ on your keyboard.

Once a new category has been created, you can do several things with it.

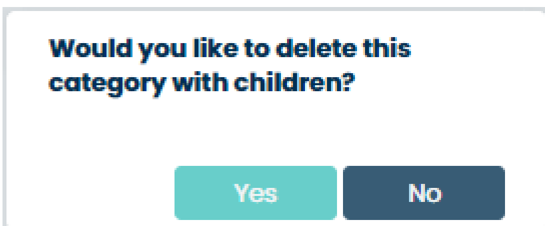
The first one is that you can add a sub-category by clicking the  button and adding a sub-category in the same way as you did it with the main one.

Each category that also has sub-categories will be displayed by default with those sub-queues hidden. To see them, you must expand the queue by clicking on  button. Then you will see the queue along with its sub-queues just like on the following screen.



If you want to change the name of any category just click the  button, change the name, and hit 'Enter' or click the  button.

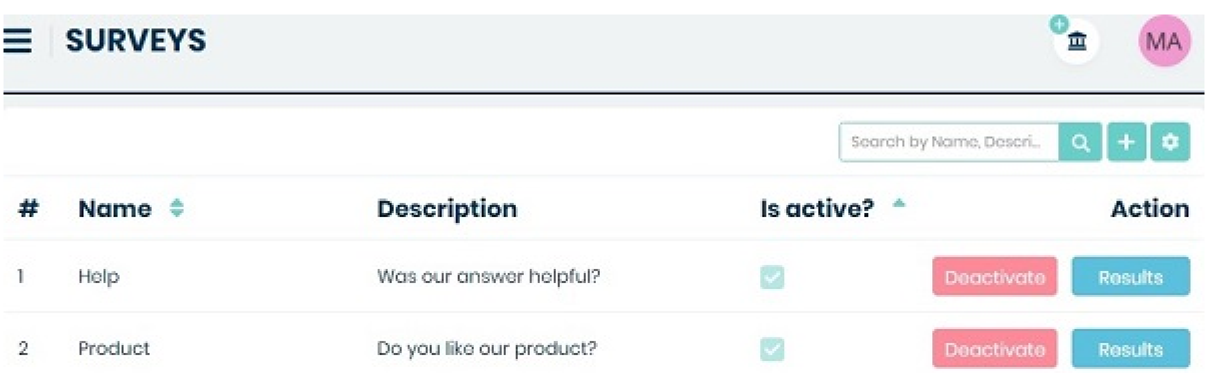
In order to delete a category, click on the  button, and in the new window click 'Yes'.



Remember that you can always change the position of each category and sub-category in the structure. To do that just click the  button next to the position you want to move. Now, while holding the Left Mouse Button just drag and drop this position to the plane you want it to be. Releasing the Left Mouse button will put this position in the newly chosen place.

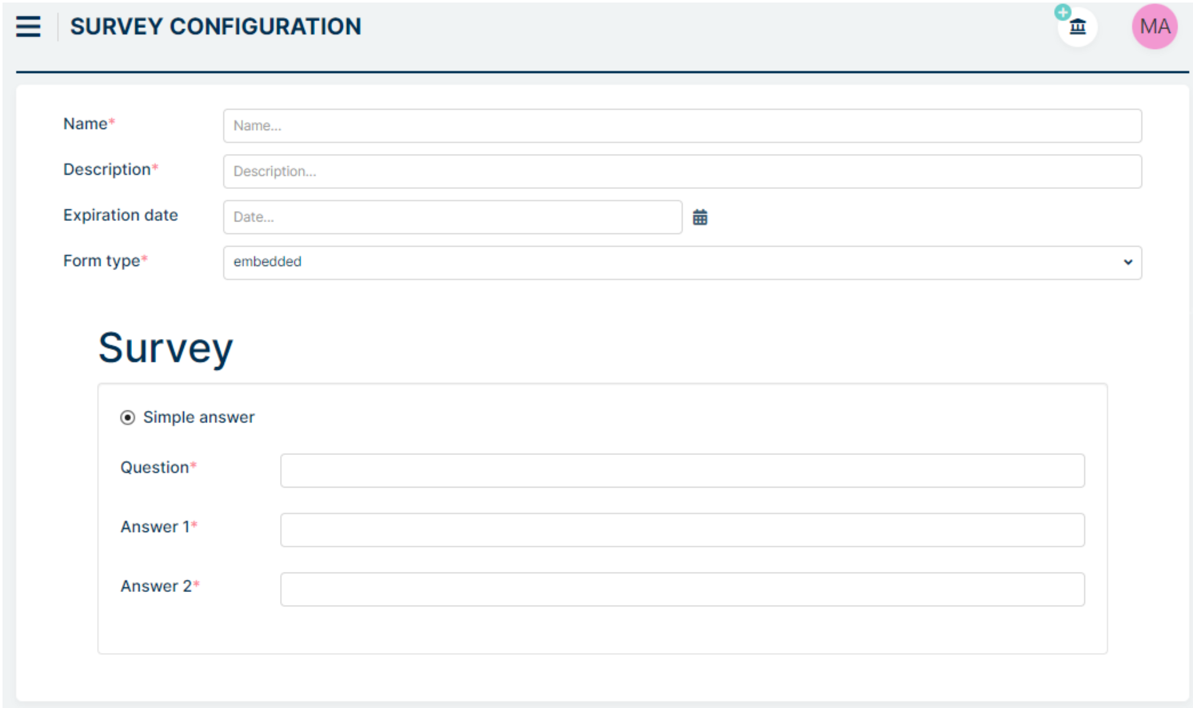
5.15 SURVEYS

This is the place, where all of the surveys in the system are managed. Right here, you will find the list of all your surveys and see the results of each one.



If you want to create a new survey, you need to click on  button, located on the right side of the search box.

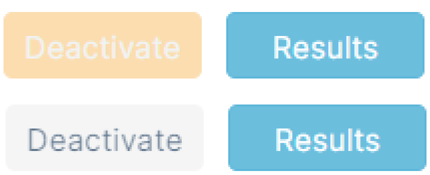
Once you do that you will be moved to the ‘Survey Configuration’ form, where you need to put in some information: ‘Name’ and ‘description’ of your survey, ‘form type’, ‘question’ and two answers.



Once you finish, click on the 

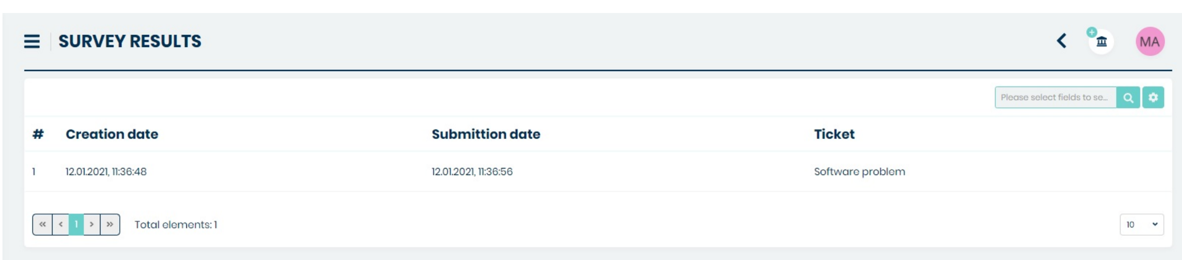
button to create a new survey.

Now, with a newly created survey, as well as any other, you can do a couple of things. First, you can ’Deactivate’ the survey. Deactivating means that the survey will be locked and not available to use.

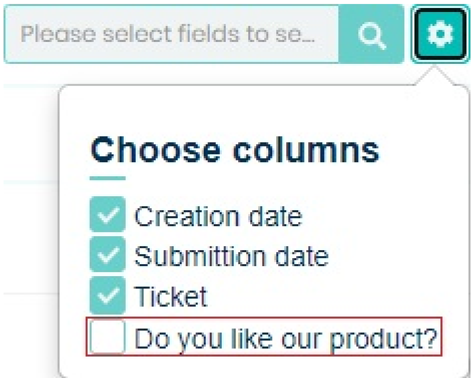


Second, if you want to see results of the survey, you need to click on 

button, located next to ’Deactivate’ button.



In this view you can see ‘Creation date’, ‘Submittion date’, ‘Ticket’. But there is no section with the answers given. To see them you need to click  then choose the question you want to see.



Now you can see answers.

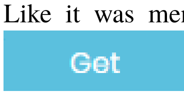
#	Creation date	Submittion date	Ticket	Do you like our product?
1	12.01.2021, 11:36:48	12.01.2021, 11:36:56	Software problem	Yes

5.16 LOGS

5.16.1 MESSAGES

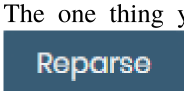
In this section, you can see the whole activity from your email boxes. This means that the messages downloaded from there will be displayed in this part of the system.

Like it was mentioned before (in Email > Accounts) those messages can be force downloaded by using the



located in that part of the system. By default, messages are downloaded once every minute.

The one thing you can do with those messages while being in a 'Messages' section is that you can use the



button located in the 'Action' column of each message.

Using this button will force the system to once again try to process the message and create a Ticket from it.

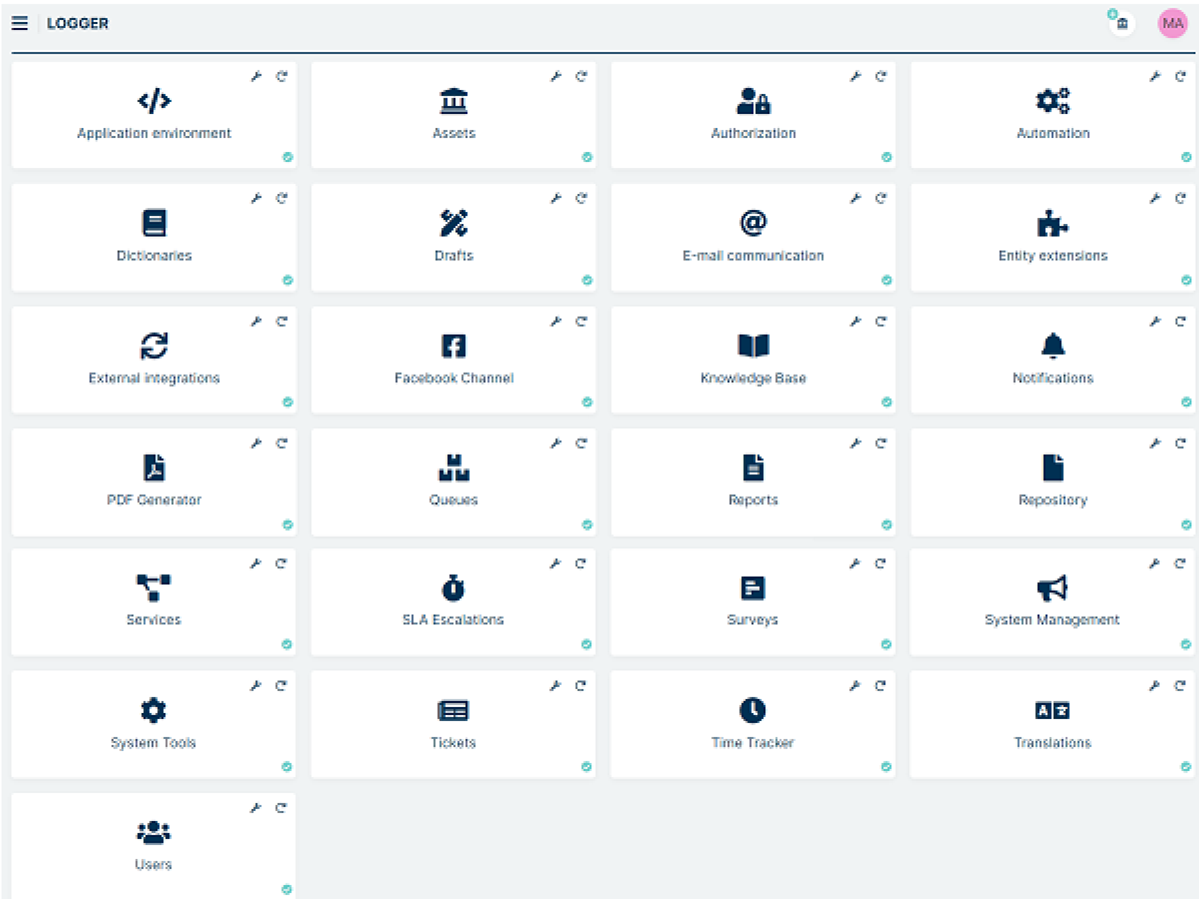
Basically, the 'Reparse' is used in case there are any problems with downloaded messages. One of those problems can be when a system downloaded the message and put it in the 'Messages' sections, but a new Ticket has not been created.

Those errors, as well as other activities like when a message was sent to a ticket, can be seen in this part of the system.

5.16.2 LOG MANAGER

This is a very important section that is used by the administrator of the **MINT Service Desk**. It's very useful because it gives you all of the information and activity details required to track any issue. All of the activities are saved in log files. In order to track issues or check the activity, you can look for them in this section.

Once you go to the "Logs" you will see that the default view is divided into many different sections representing different entities from the system. Thanks to that information are not mixed, and it will be easier for you to analyze them.



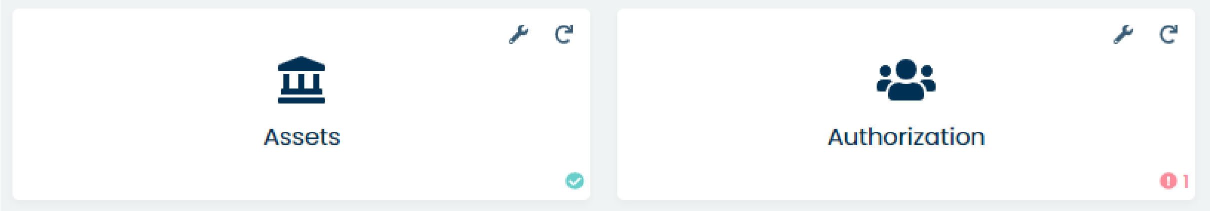
The logs are divided into 25 different sections:

- 'Application environment',
- 'Assets',
- 'Authorization',
- 'Automation',
- 'Dictionaries',
- 'Drafts',
- 'E-mail communication',
- 'Entity extensions',
- 'External Integrations',
- 'Knowledge Base',
- 'Notifications',

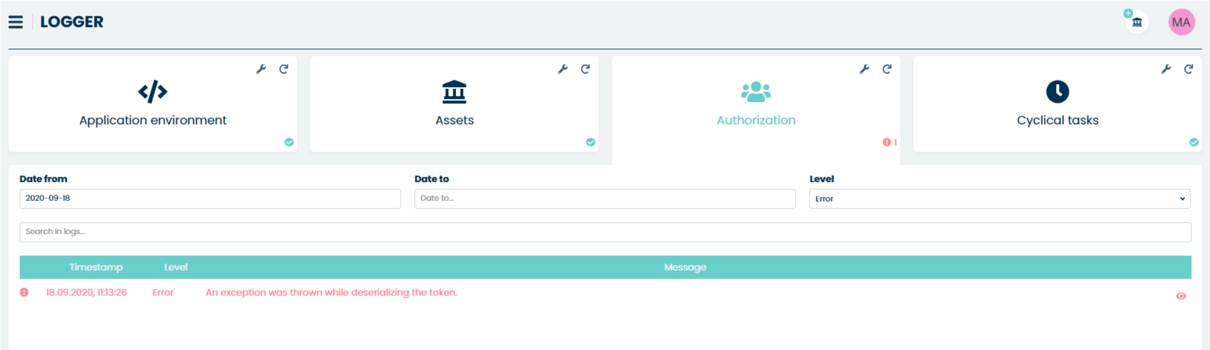
- 'PDF Generator',
- 'Queues',
- 'Reports',
- 'Repository',
- 'Services',
- 'SLA Escalation',
- 'Surveys',
- 'System Management',
- 'System Tools',
- 'Tickets',
- 'Time Tracker',
- 'Translations',
- 'Users'.

Each of them, of course, includes the logs from that section or group from **Mint Service Desk**. For example, if you want to look for any errors within your tickets you have to check 'Tickets' or if you want to check if everything is ok with your assets activity use 'Asset'" and so on.

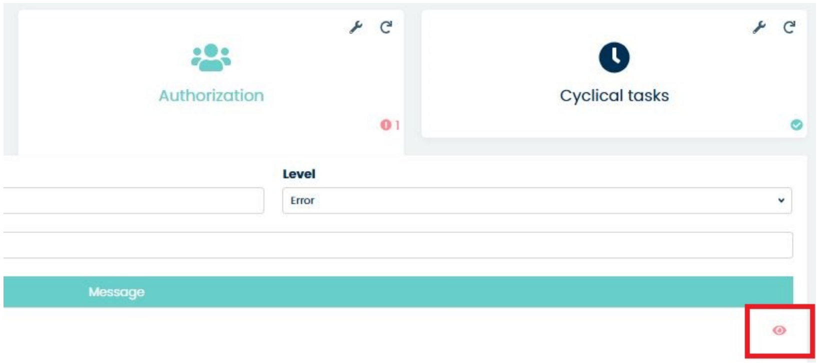
On the right bottom corner of each, you can easily check if everything is okay or if there are any problems. You will see either the or 1 icon. The first one means that everything is in order, while the second one tells you that there is a particular number of problems here.



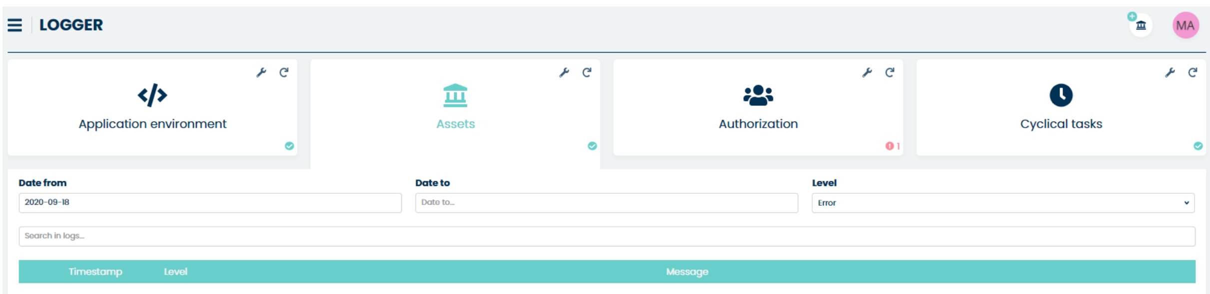
Now, if you click on the 1 icon the section will expand, and you will see the list of those errors.



In order to see the details of an error/exception, you need to click on the icon located on the right side of each position on the list.

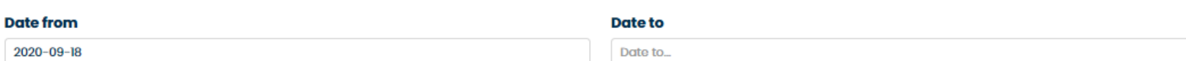


If you click on the icon the section will expand, and you will see default options allowing you to browse through logs.

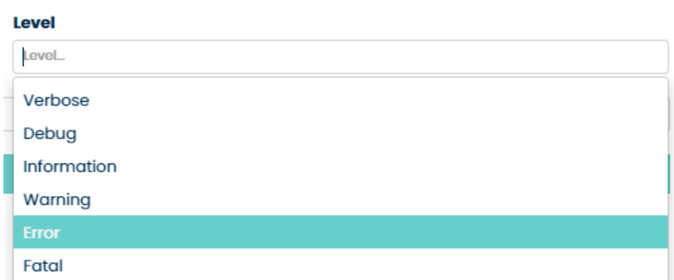


BROWSING THE LOGS

Click on the section you want to check. From the available searching fields select the time period you want to look for by setting "Date from" and "Date to".

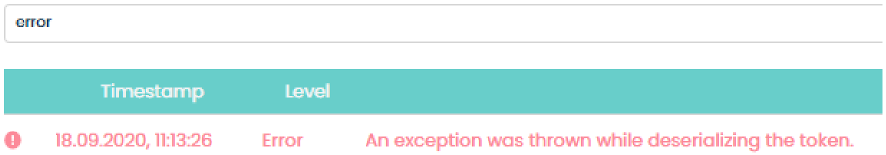


Now choose the 'Level' of logs you are looking for. You can choose between "Verbose", "Debug", "Information", "Warning", "Error" and "Fatal".



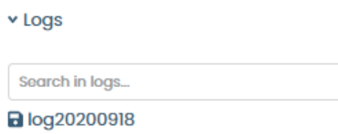
If you are looking for something in specific you can type in a single word or text in the 'Search for log…' field.

The results will be displayed down below.



If you want, you can save the results. At the bottom part of the result list, you will find the 'Download' button. Mint Service Desk will always save them in a .ZIP file format.

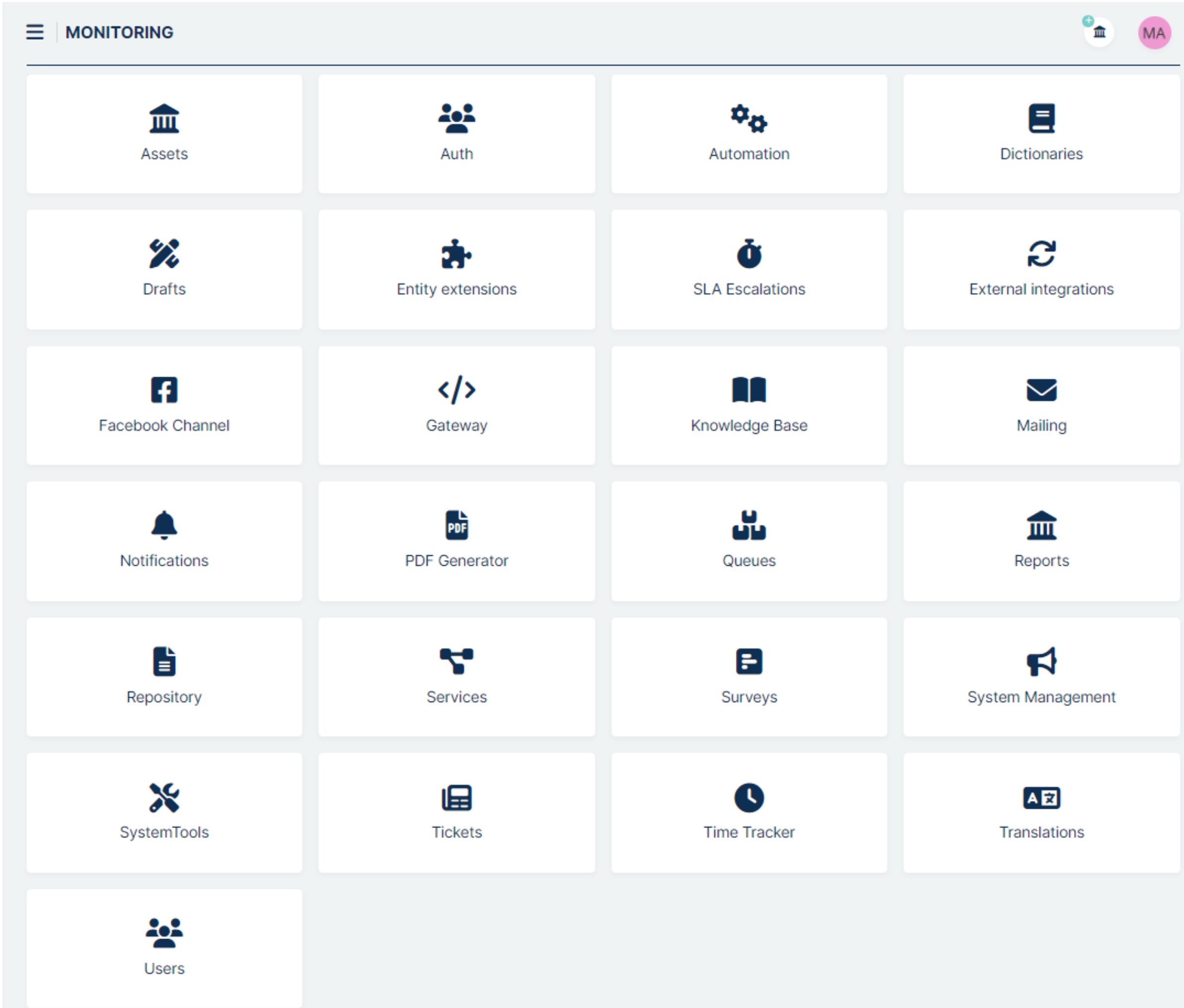
Click on 'Download' and you will see a list of logs divided into single days. For example, 'log20200918' means that those are logs from 18.09.2020.



Click on the one you want to download, choose the desired place to save the file in your system file explorer, and click 'Save'. Once a file is saved you just need to extract the .zip file and you will have the logs in a form of a text document.

5.16.3 MONITORING

This section of the system is used to monitor services.



The available monitoring services are:

- 'Assets',
- 'Auth',
- 'Automation',
- 'Dictionaries',
- 'Drafts',
- 'Entity extensions',
- 'SLA Escalation',
- 'External Integrations',
- 'Gateway',
- 'Knowledge Base',
- 'Mailing',
- 'Notifications',
- 'PDF Generator',

- ‘Queues’,
- ‘Reports’,
- ‘Repository’,
- ‘Services’,
- ‘Surveys’,
- ‘System Management’,
- ‘System Tools’,
- ‘Tickets’,
- ‘Time Tracker’,
- ‘Translations’,
- ‘Users’.

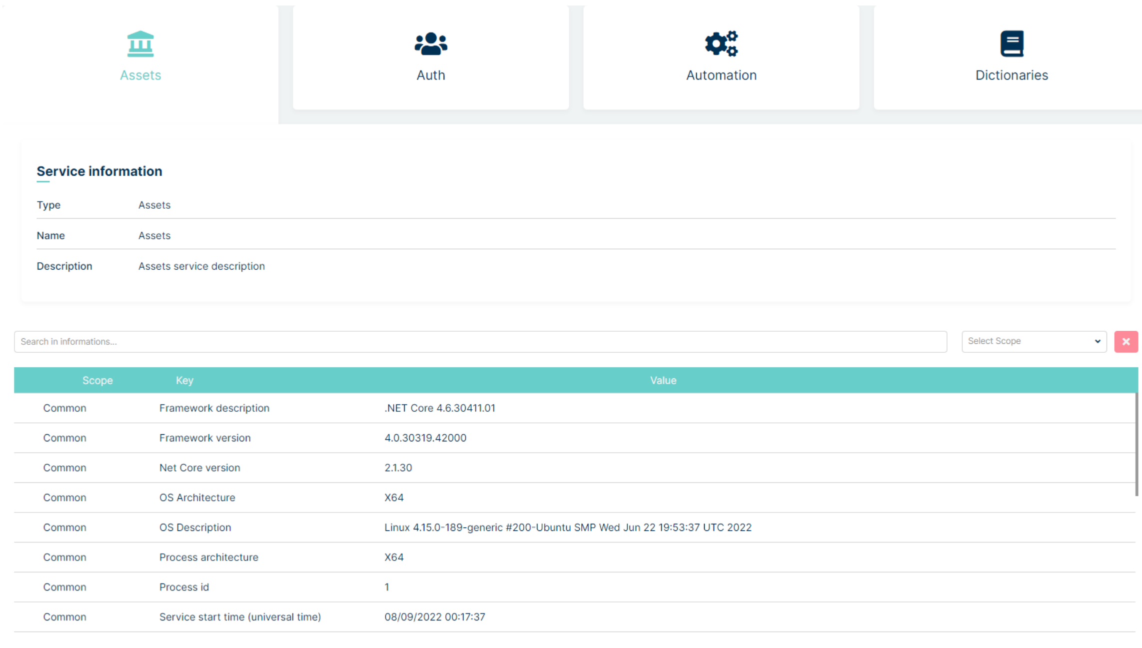
When you press one of the services in the first place, it appears:

- Type
- Name
- Description

Below these fields is a search engine so that you can search for information. Next to this is a field for selecting a scope. Depending on the service there are different scopes but all possible options are:

- Common
- Database
- Logger
- Plugin
- RabbitMQ

Below the range is a table of searches.

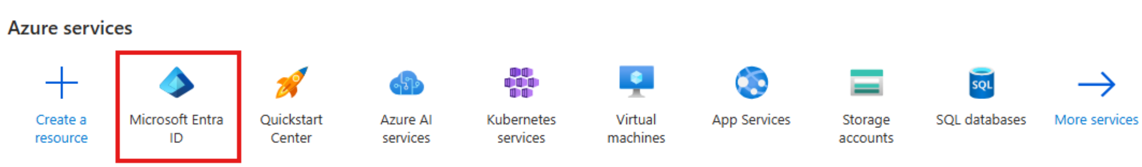


5.17 AUTHENTICATION BACKENDS

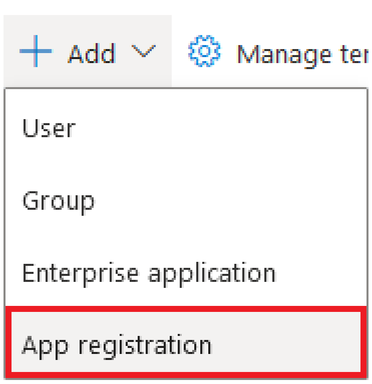
In this section you can configure your OpenID Providers and LDAP.

5.17.1 AZURE AD

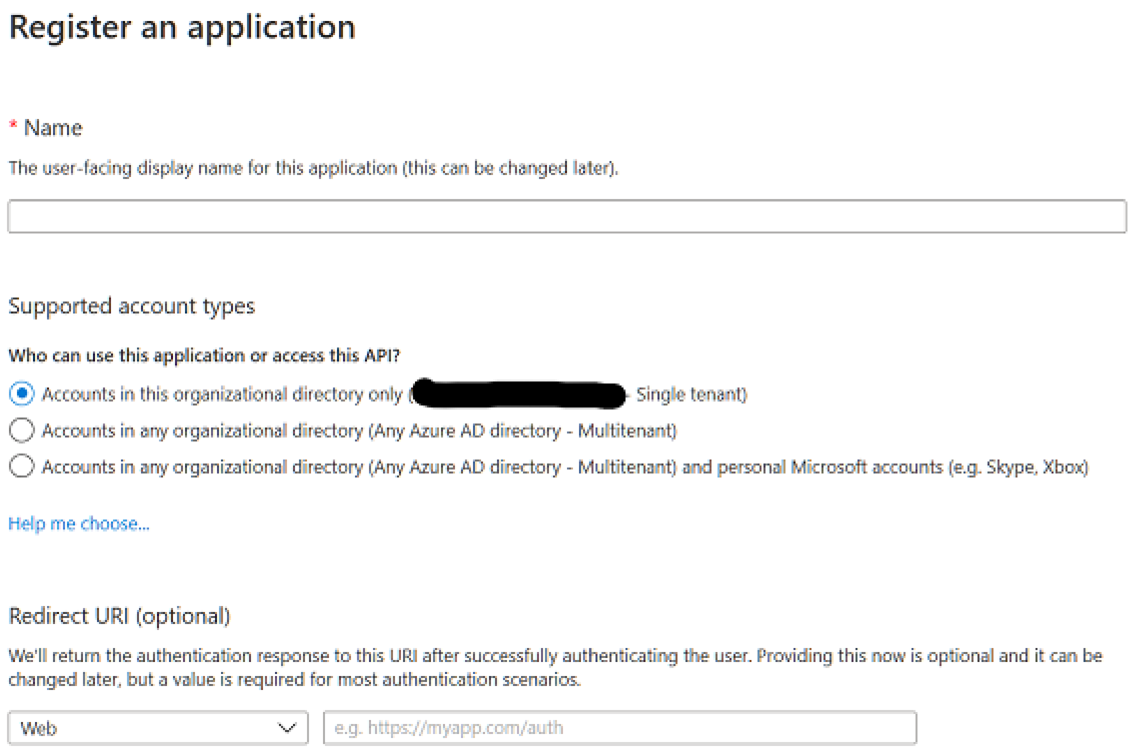
First go to https://portal.azure.com Sign in and go to **Microsoft Entra ID** services.



Go to "App" and 'App registration'



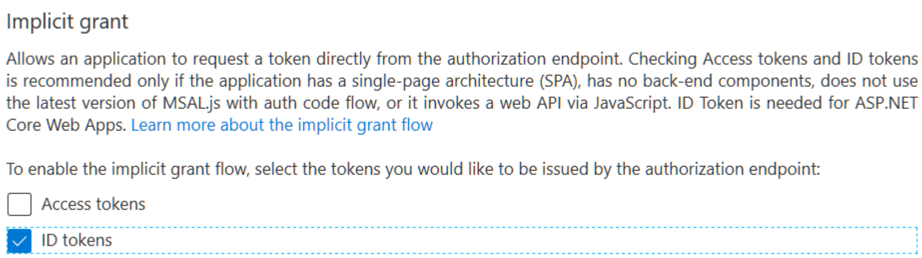
The following form will appear.



Now fill up the form:

- in 'Name' field type your preferred name
- 'Supported Account Types': leave it as it is
- 'Redirect URL': fill it with **https://{your.mintsd.domain}/external/signin-{your-scheme}**
  - Replace **{your.mintsd.domain}** with your domain name
  - Replace **{your.scheme}** with schema name which will be needed later on
- After the registration go to the **Authentication** tab

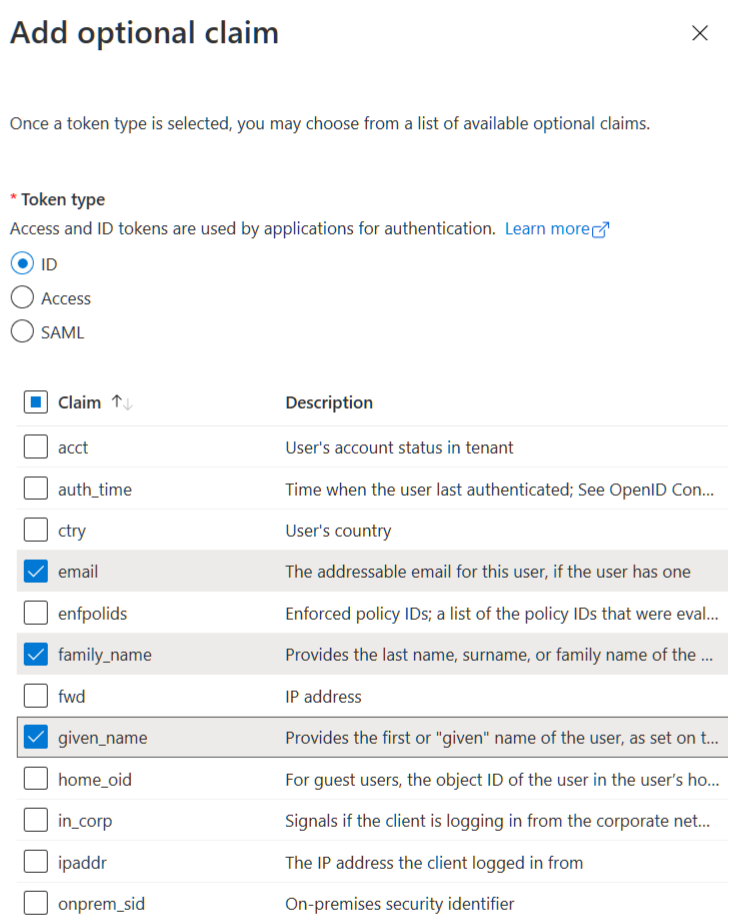
In 'Implicit Grant' section check **ID tokens**



Go to **Token Configuration** tab.

Click on **Add optional claim**.

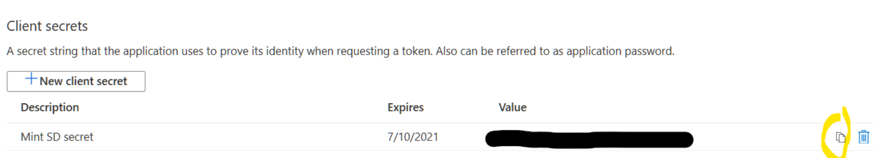
Check **ID** token type and **email**, **given_name**, **family_name** claims.



Go to **Certificates & secrets** tab.

Add new client secret by clicking on **New Client secret**.

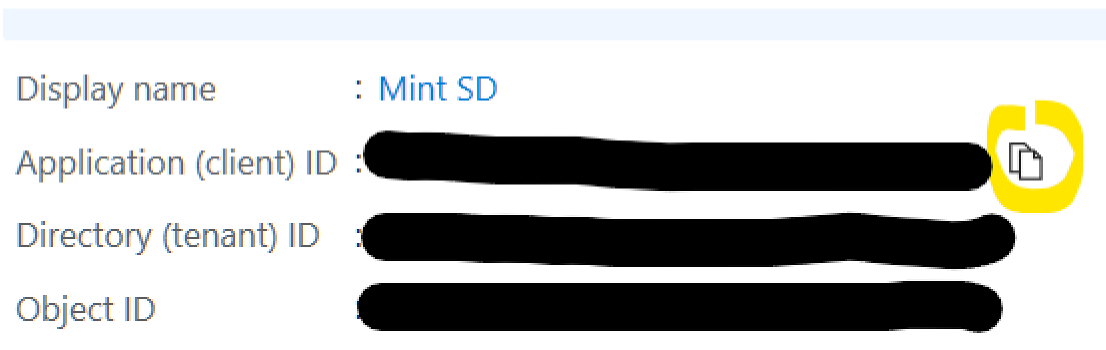
Remember to copy client secret afterwards by clicking on copy button.



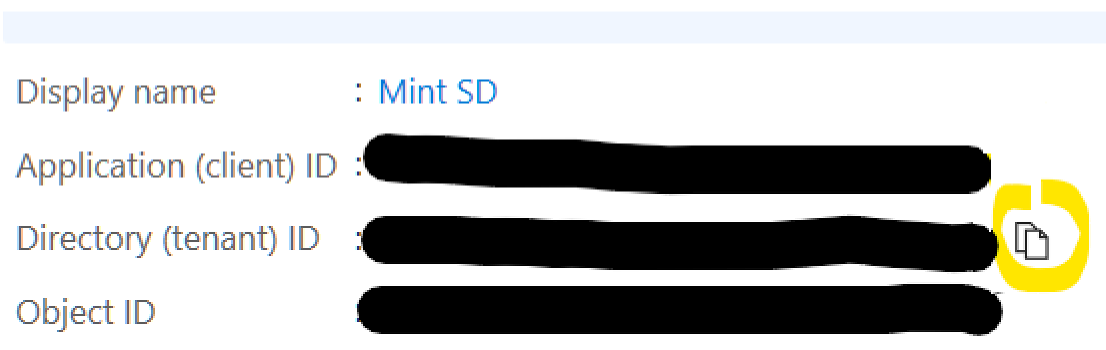
In the **Authentication Backends** section go to **OpenID Providers** click on  button, the following form will appear.

Now fill up the form:

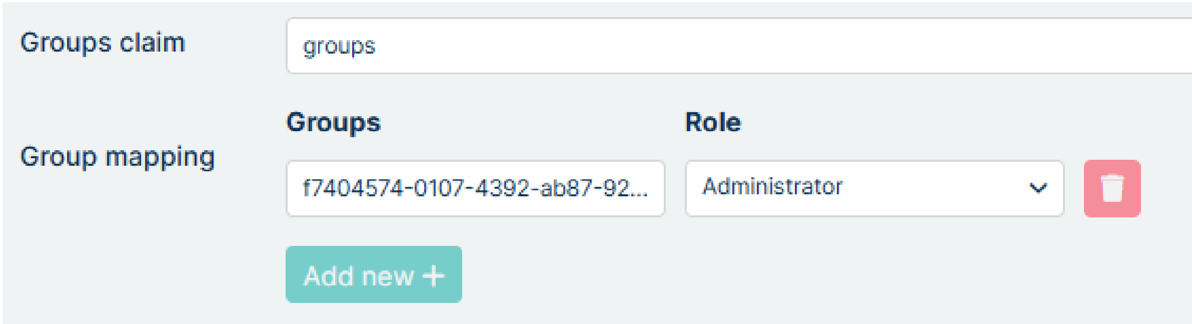
- value from **Name** will appear on Login screen
- in **Scheme** field type value from one of the previous steps (**{your.scheme}**)
- in **Type** field select **AzureAd**
- in **Client secret** field paste the value from previous step ('Cerificates & secrets' tab)
- in **Client id** field paste the value from registered app overview



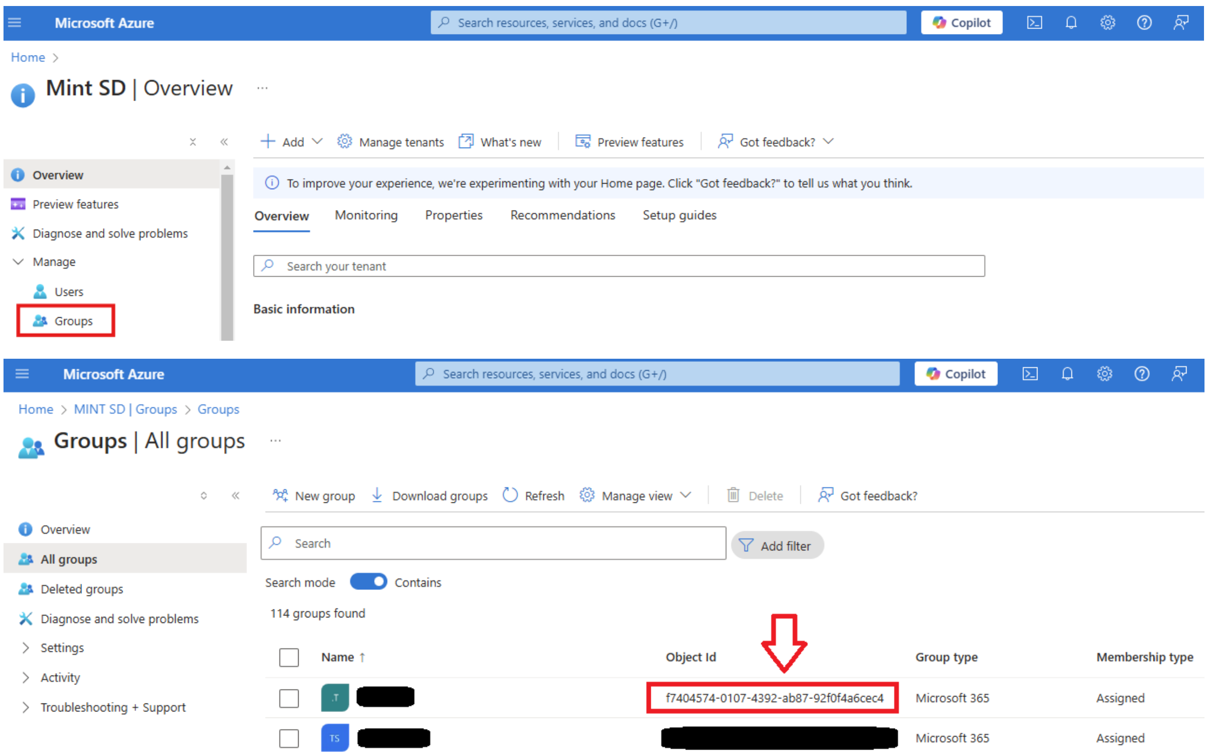
- in **Tenant Id** field paste the value from registered app overview



- in **Groups claim** field, enter the name: 'groups'. The new fields will appear below in **Group mapping** section. Paste ID of Azure group to **Groups** and select Agent role from **Role** to connect Azure group with Agent role. You can combine more groups under one claim by pressing Add button.

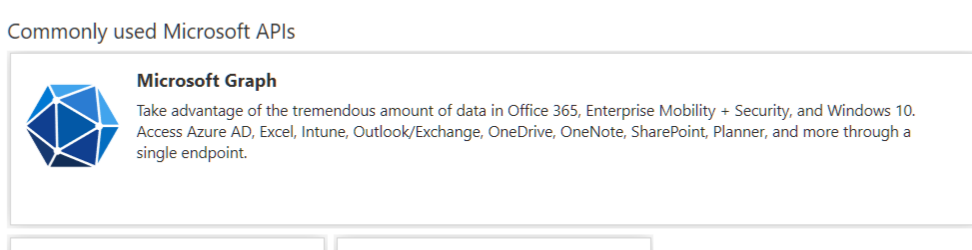


You will find the group ID in Azure AD under the path: **Home > Microsoft Entra ID > Manage (sidebar) > Groups (sidebar) > All groups (sidebar)**

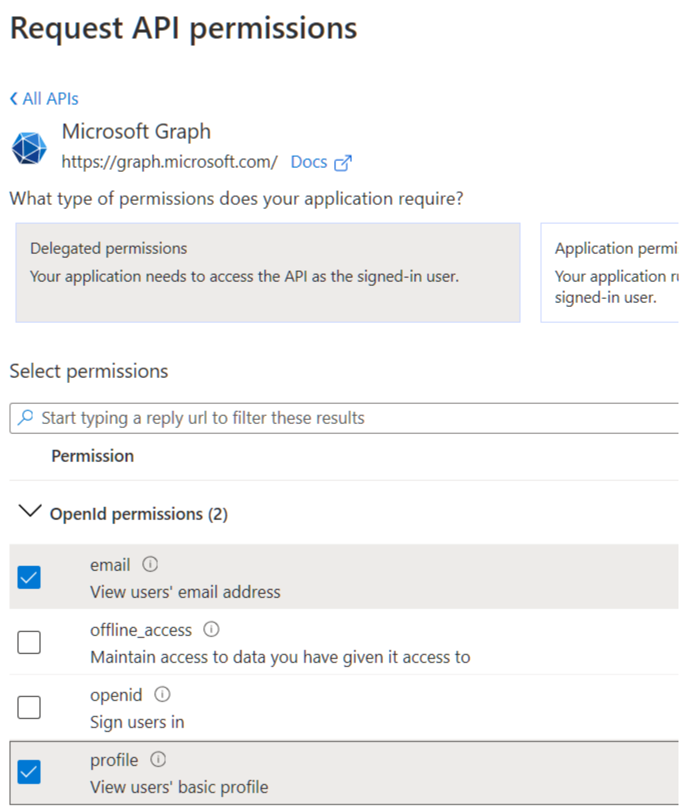


Go once again into Azure portal. For some time there is a need to add additional permissions under **API permissions** section.

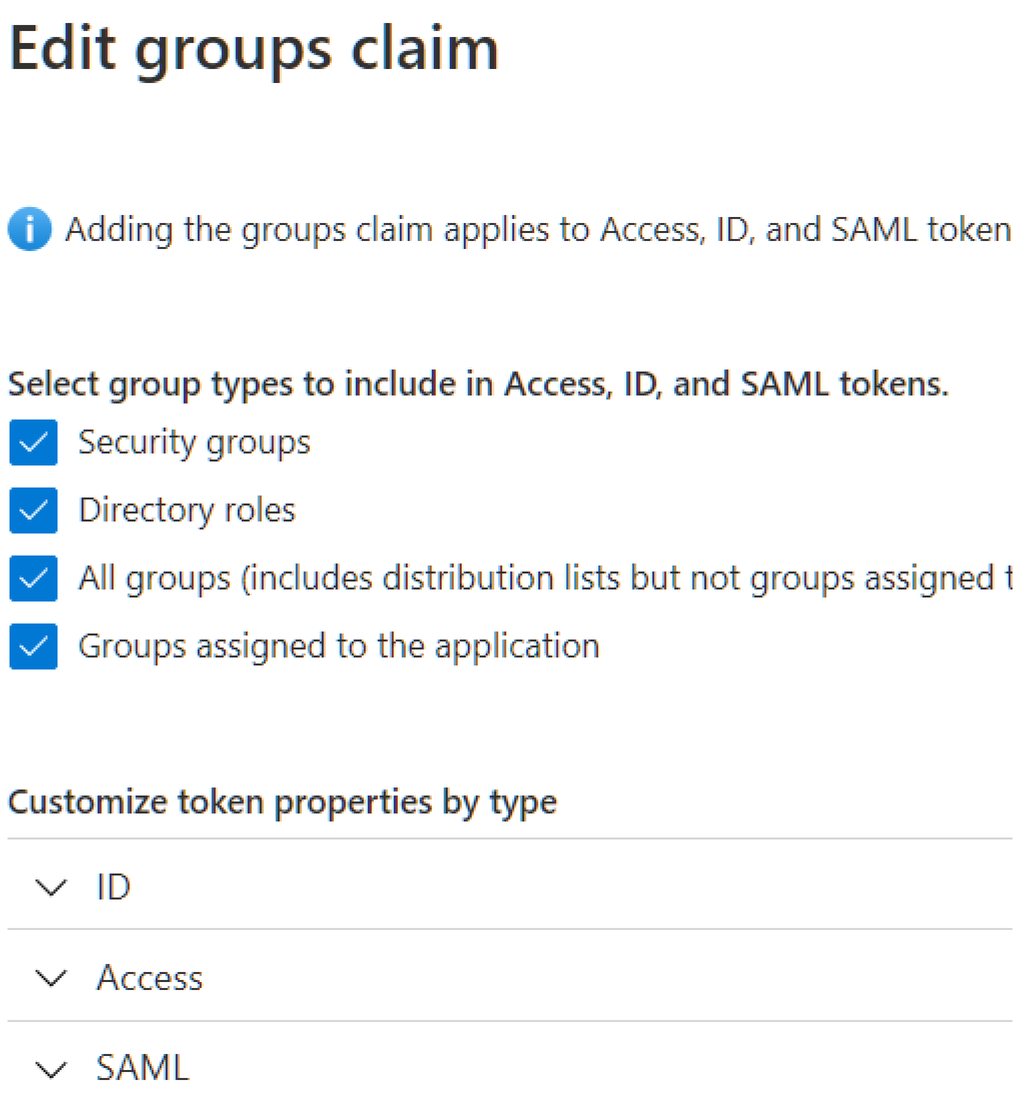
- click on **Add a permission**
- select **Microsoft Graph**



- select **Delegated permission** and check **email** and **profile**

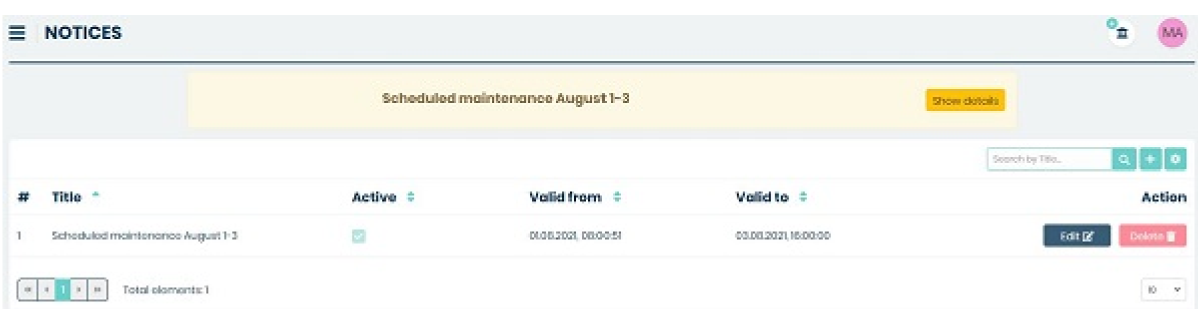


In case of a need to configure group mapping, go once again into Azure portal and under **Token configuration** click on **Add groups claim**. Now select all check-boxes and click on **Add**.



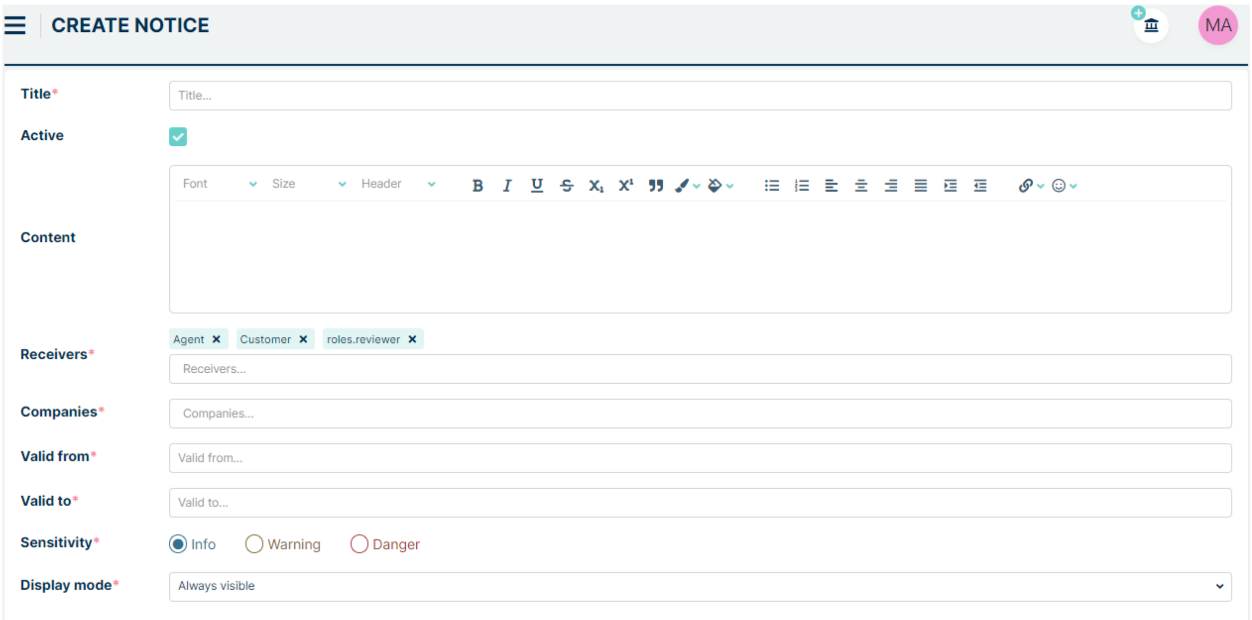
5.18 NOTICES

Here you can set the admin notifications that will be visible at the top of the page.



If you want to create a new notice, you need to click on  button, located on the right side of the search box.

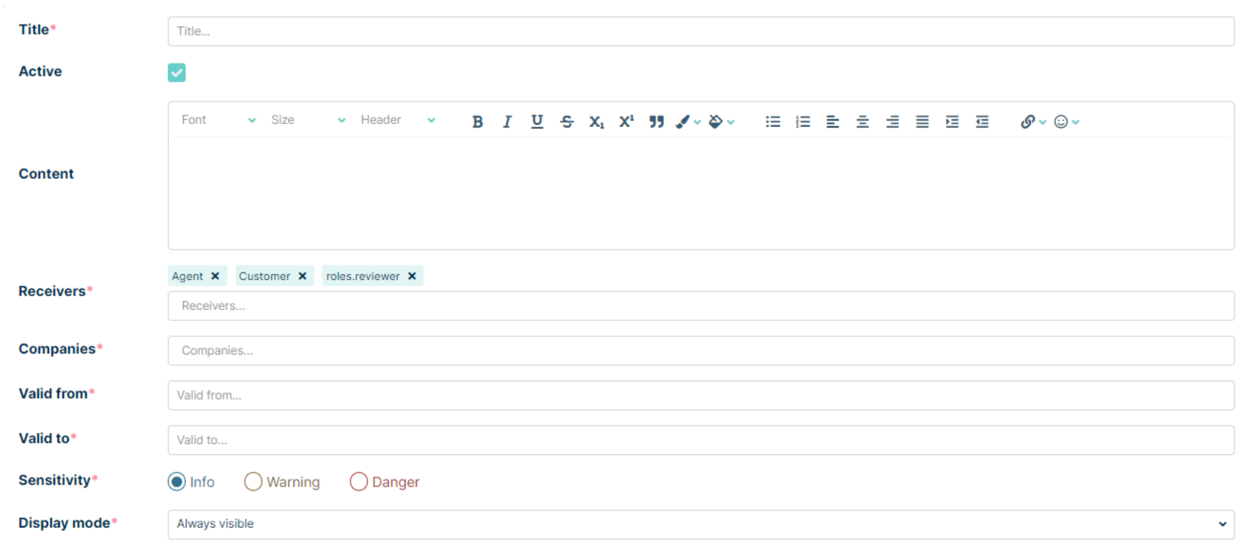
Once you do that you will be moved to the 'Create Notice' form, where you need to put in some information of your notice.



Fill the information on this page:

- **Title:** Enter the title of the notification to be displayed at the top of the page.
- **Active:** Decide if the notification should be active or not.
- **Content:** The message that will be displayed when the notification is expanded.
- **Recivers:** Choose who you want this notification to go to. Currently, you can choose from three options: Customer, Agent and Admin.
- **Companies:** Select for which companies the notification should be displayed.
- **Valid from:** The date and time from when the notification will be effective.
- **Valid to:** The date and time until which the notification will be effective.
- **Sensitivity** Choose from three possible options: Info = Blue, Warning = Yellow and Danger = Red.
- **Display mode** Select how the notification should be displayed.

Example of admin notification setup.



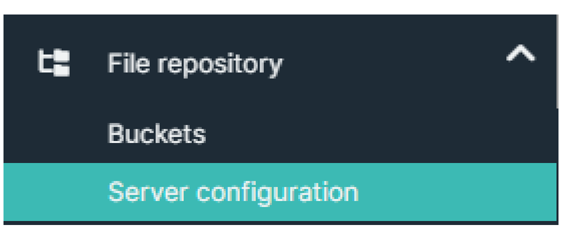
Effect

5.19 FILE REPOSITORY

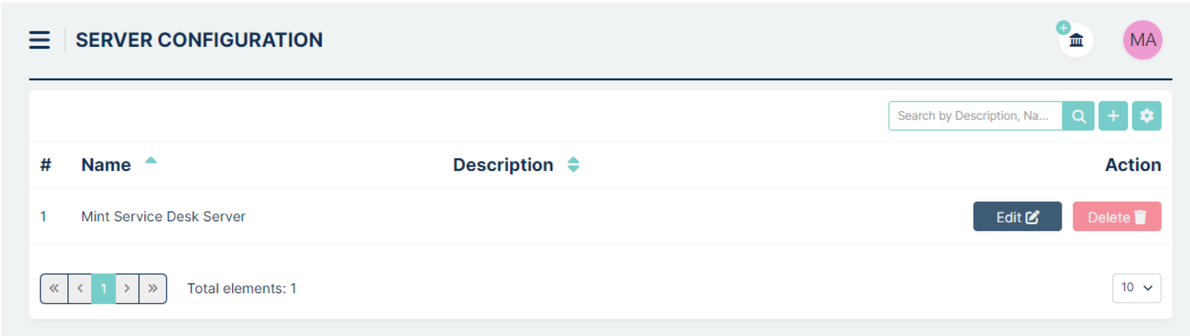
File Repository is a place for the orderly storage of "MINT" application documents. Each user level has different options for dealing with files from the repository. The administrator can create "Buckets" - containers that store files, upload, download, delete files and configure servers where files will be stored. Agent can pin files from "Buckets" to selected tickets and download files. The customer can only download files if they are assigned to a given ticket. Here we will deal with the description of the administrator profile.

5.19.1 SERVER CONFIGURATION

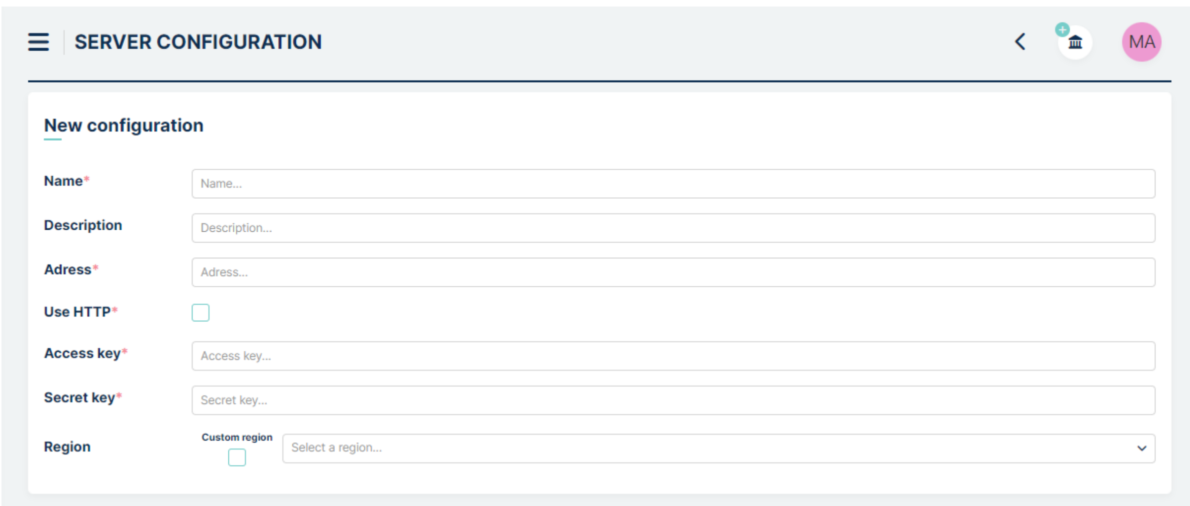
First step to start using file repository is server configuration. To do this, we need to go to the "File repository" tab in sidebar and click on "Server configuration" after expanding it.



Next we see page where all servers for the file repository are configured. The page also has a search engine, a filter, and  icon that allows us to add a new server to the file repository.



When we click  button, the Server Configuration page appear

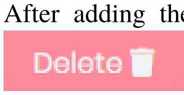


Let's describe fields on page:

- **Name** – we can set our server name here
- **Description** – for description of our server
- **Adress** – server adress field
- **Use HTTP** – checkbox to use http protocol to connect
- **Access key** – required to set up connection
- **Secret key** – secret to our server
- **Region** – to set the region

Most of these fields are required, as it was marked on screen above.

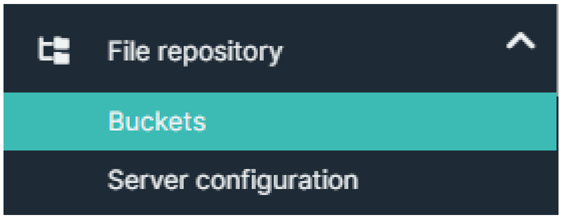
After adding the server, two buttons appear: 

- to make changes to the existing server and 

- to remove an unnecessary server.

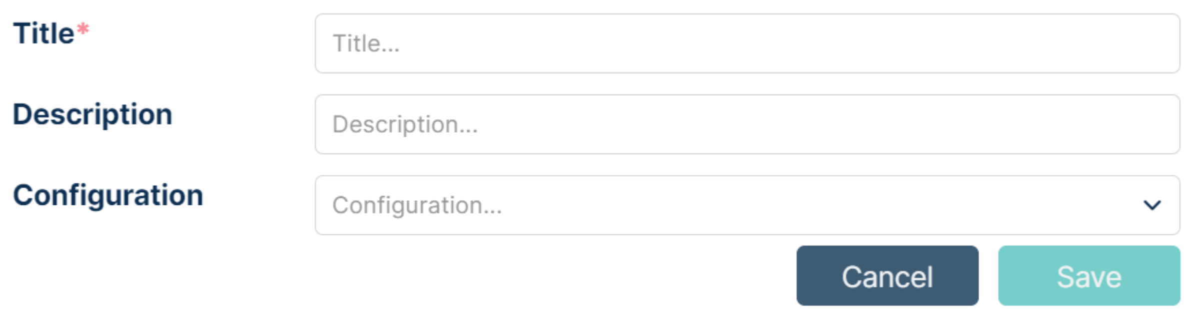
5.19.2 BUCKETS

Bucket management is placed in „Buckets” section in File Repository



Here we can see our previously created buckets

To create a new bucket, we need to click on the button. Then, a modal will appear on the screen with three fields to fill in:



Let’s describe fields on page:

- **Title** – to name our bucket
- **Description** - here you can enter information about our bucket
- **Configuration** - to choose the previously configured server

After filling all fields and clicking 

button, a bucket appears. We can always edit bucket (by clicking on the  icon) or delete (by clicking on the 

icon). To enter the bucket, you just need to click on it.

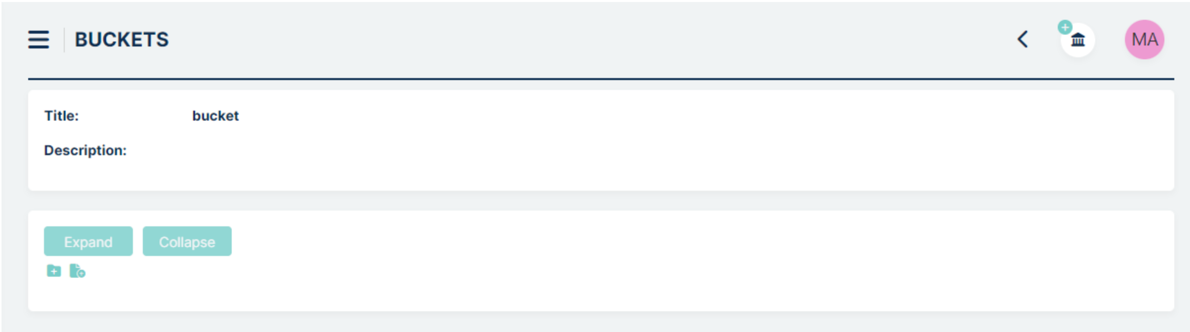
ADDING FOLDERS AND FILES TO BUCKET

After entering our created bucket we can see 

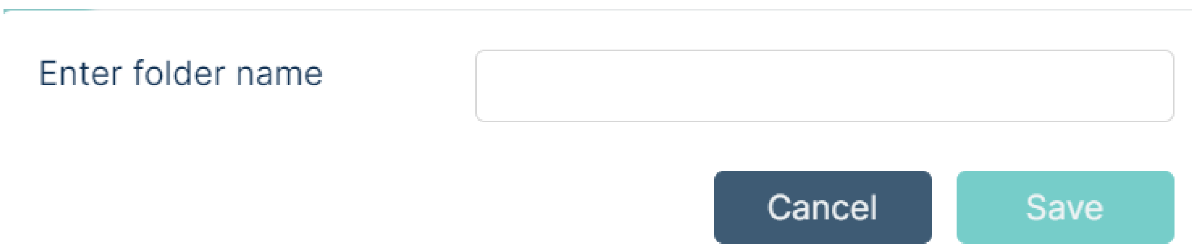
and 

buttons, used to expand or collapse

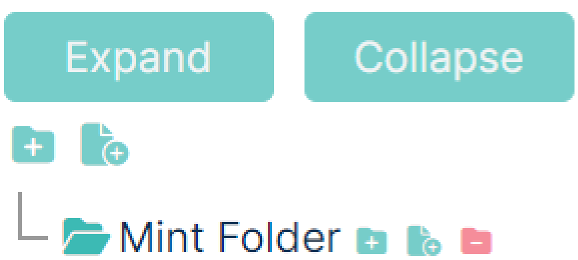
the folder tree. Additionally, we have buttons like "Add Folder"  and "Add File" .



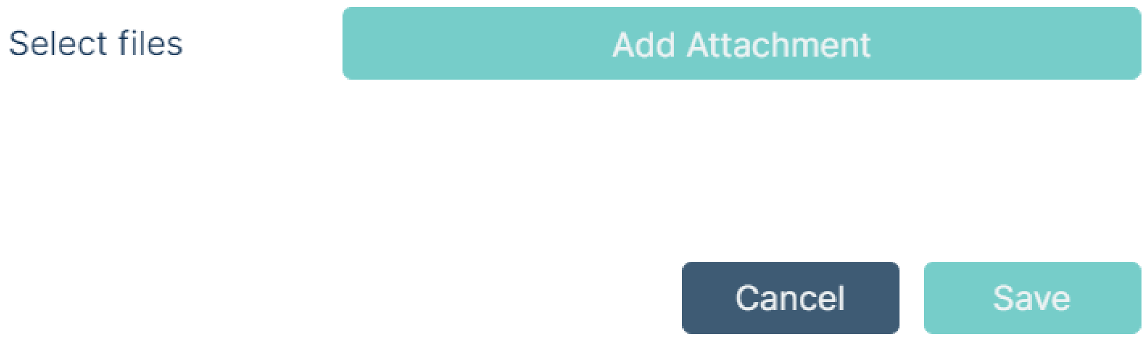
When we click on , a modal will appear with a text field where we can enter the name.



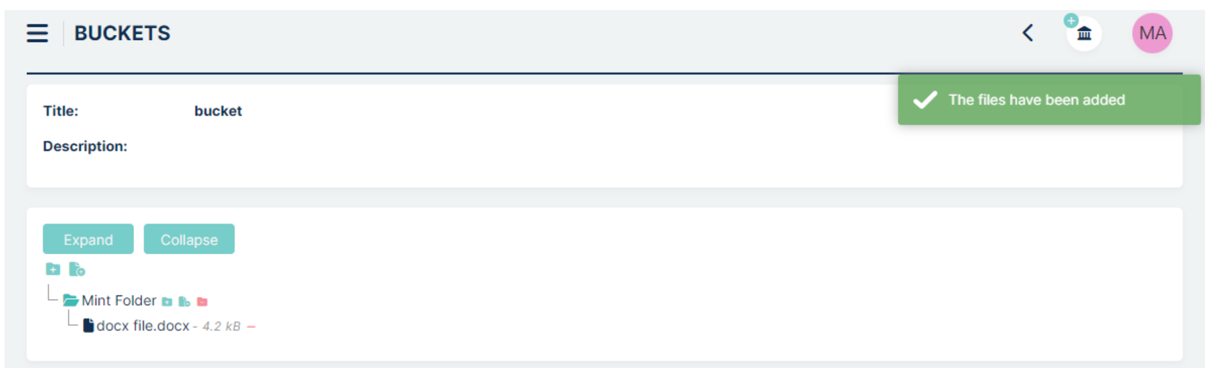
The added folder it will appear slightly below the button. In this folder we have the same buttons as above (Add folder and file) and an additional red "Delete folder".



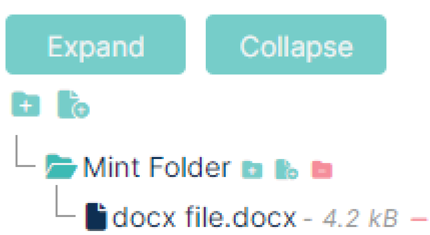
When you click on the "Add file" icon, a modal appear with upload button that allows you to upload selected files from the target device.



We can save several files at once. After uploading the files and clicking  the modal disappear by itself and the file appear in the folder. There is information that file uploaded succesfully

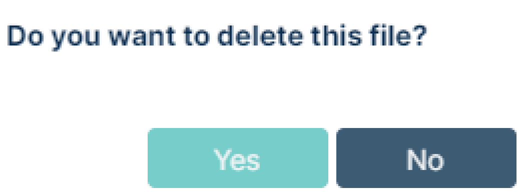


After adding a file to bucket, we will see the given format (for example .jpg), size (for example 338.6 kB) and a red minus to remove the file.



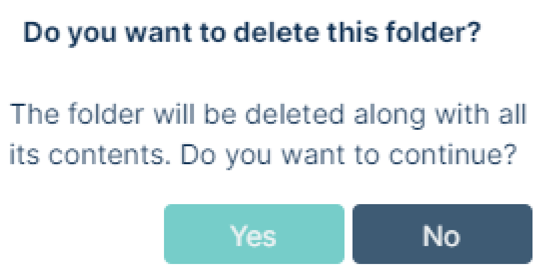
REMOVING FILES, FOLDERS AND BUCKETS

To remove file from bucket, we simply click on red minus on the right from file name. There is a toast to confirm operation



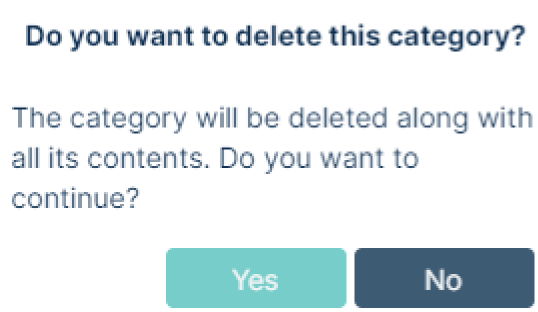
Accepting this operation will remove file permamently

To remove folder from Bucket, we simply click on  button placed on the right from folder name. The modal with confirmation will appear



Accepting this operation will remove folder and all contained files permamently

To remove Bucket from server, we click on  button in right upper corner of Bucket. The modal with confirmation will appear



Accepting this operation will remove Bucket, with all contained folders and files permamently

DOWNLOADING FILES

Any file uploaded to the file repository can be downloaded by the administrator. To download file we just need to click on pinned file. Whole downloading process is similar as in Agent's profile and is described there.

5.20 CUSTOMER PORTAL

The Customer Portal module is designed to facilitate customer interaction by allowing them to quickly create requests using predefined templates set up by administrators. These templates can also be used by Agent as a tab in create ticket window in specific settings described further. Enabling and disabling visibility of this module for Customer is described in **SETTINGS** chapter of Admin Portal documentation.

The administration module of the Customer Portal feature can be accessed via the sidebar and consists of two main sections:

Containers

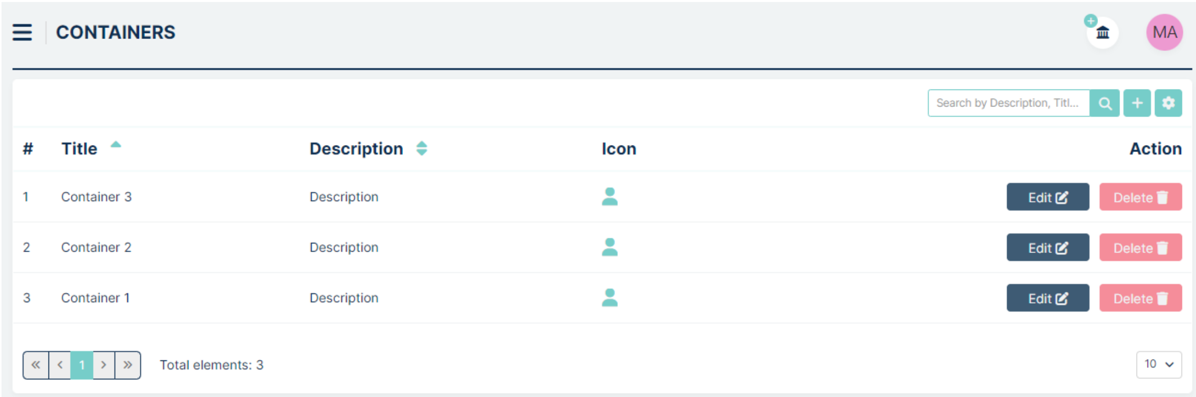
In the Containers section, administrators can assign and group customer requests or cases. This feature enables better organization and categorization of cases effectively.

Cases

In the Cases section, administrators have the ability to create templates for future customer tickets or requests. These templates include predefined information, forms, and fields that streamline the request submission process for customers. By creating these templates, administrators ensure consistency and accuracy in the requests they receive, enhancing overall customer support.

5.20.1 CONTAINERS

Clicking on this section will show us view like below



In the top right of the screen we have:

– **"Search" Field**

– **"Add Container" button** - after click we are going to the Create Container window

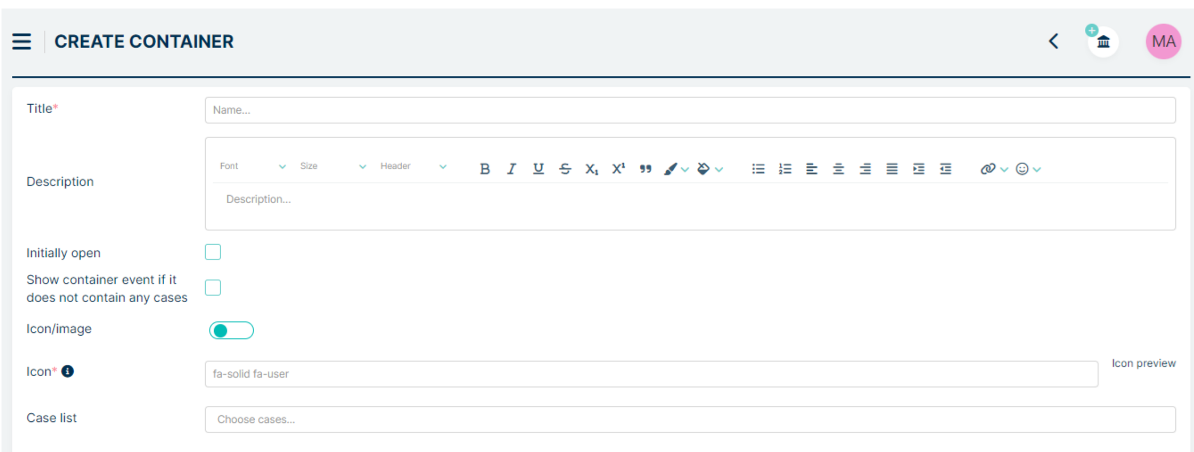
– **"Set Column Properties"** - we can set here column visibility and search field parameteres

In the center part of the screen we have the list of Containers that we created previously. We can edit them with 

button and delete with 

button

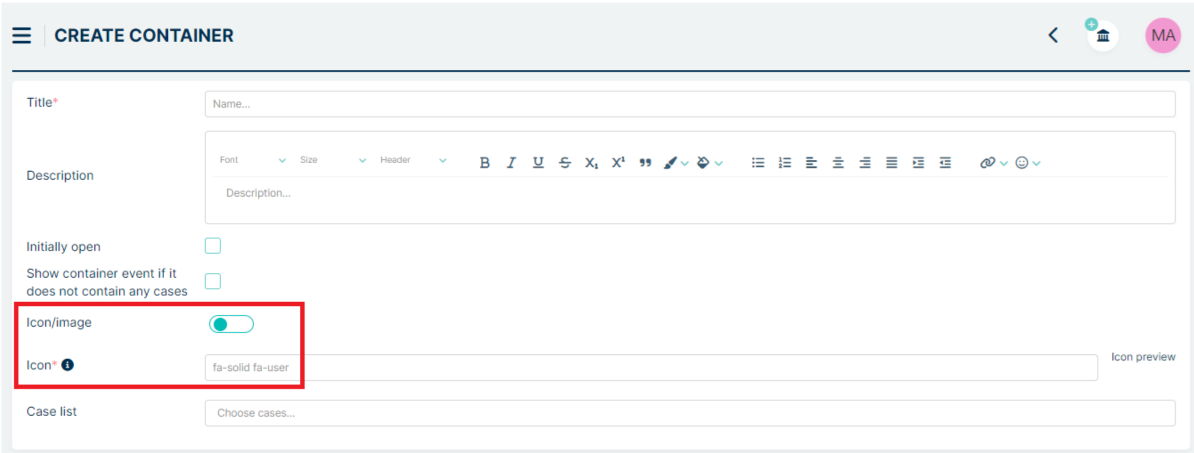
Let's describe **Create Container** window



At the top of the window, you'll find a "Title" field and an optional "Description" field. Below that, there is a "Initially open" checkbox, which you can select if you want the container to open automatically in the Customer view.

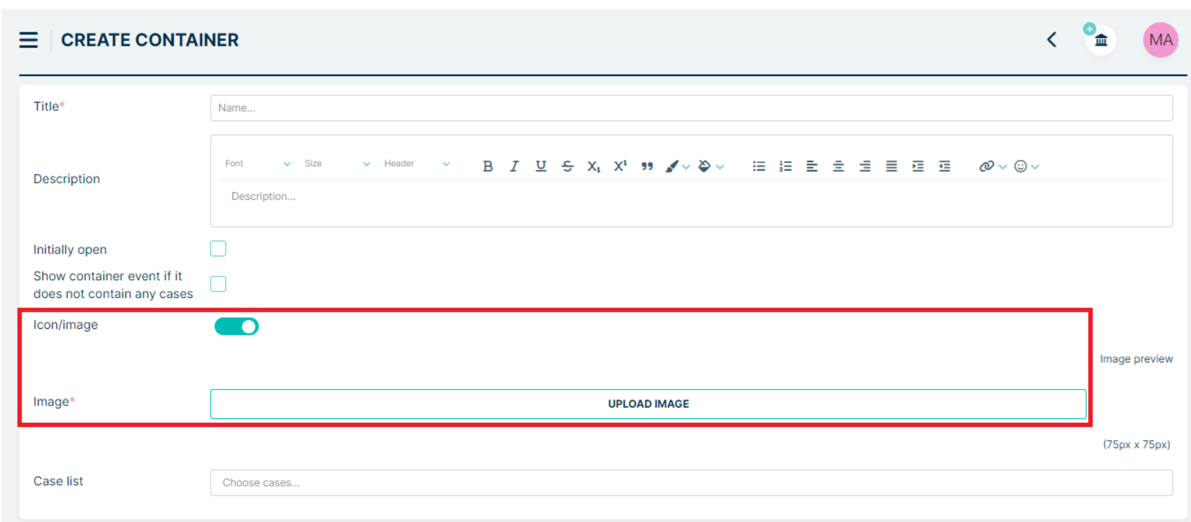
Next, we have the checkbox "Show container even if it does not contain any cases." By selecting this option, our container will be visible in the Customer view, even if it does not have any assigned cases.

To set an icon or image for the container, click on the "Icon/Image" button. If you opt for "Icon," an additional field will appear:



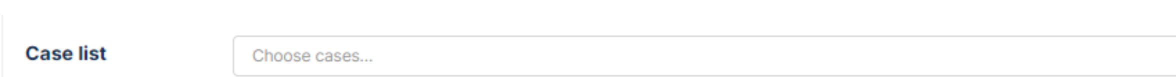
We can use icons available from https://www.fontawesome.com/icons by selecting "Free" in the filters. To correctly specify the format in the Container field, use the following format: "fa-solid fa-user". After entering this information, our chosen icon should appear in the "Icon Preview" section on the right side of the window.

If you choose to use a picture for the container, an additional field will appear:



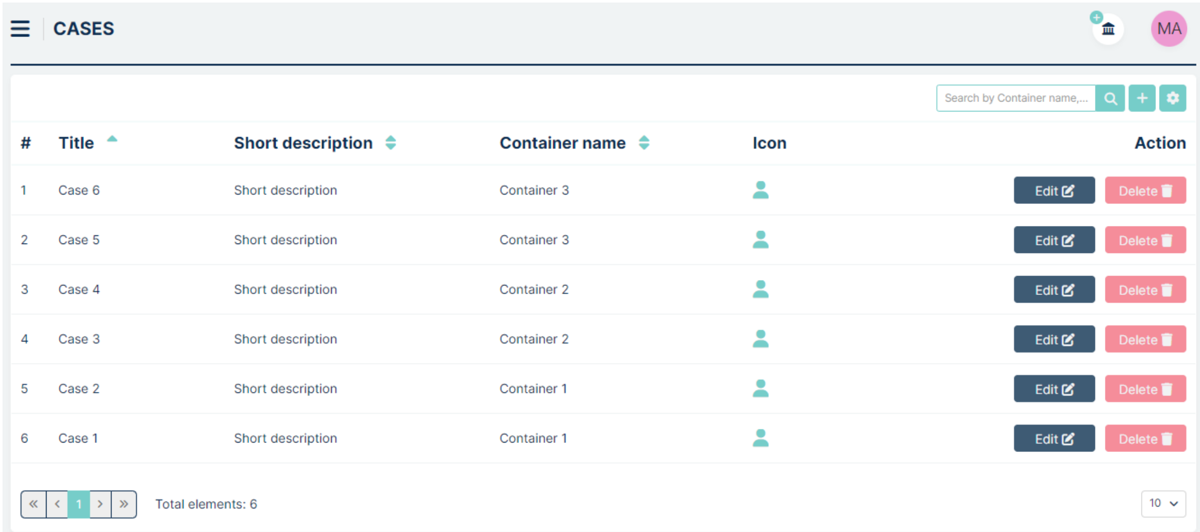
Clicking the "Upload image" button will open a "Choose file" window. We recommend using the 75px x 75px size format. The uploaded picture will be displayed in the "Image preview" section on the right side of the Container window.

The last field is "Case list." Here, you can either assign cases now or do so later by editing the container.



5.20.2 CASES

In this section, we create templates for cases. Upon entering this section, you'll encounter a view that resembles the one found in the Containers section, with similar buttons and a "Search field" located in the upper right corner.

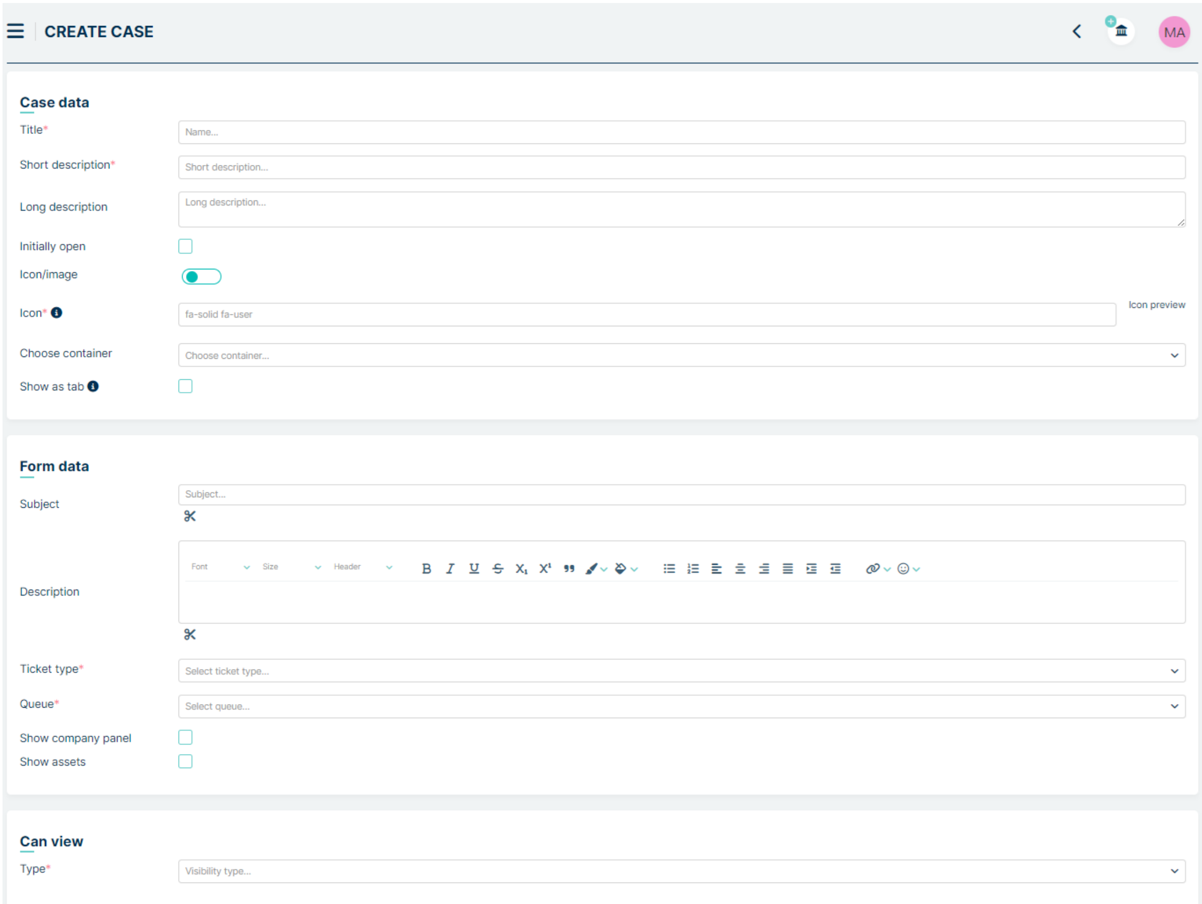


We can edit and delete each case by 

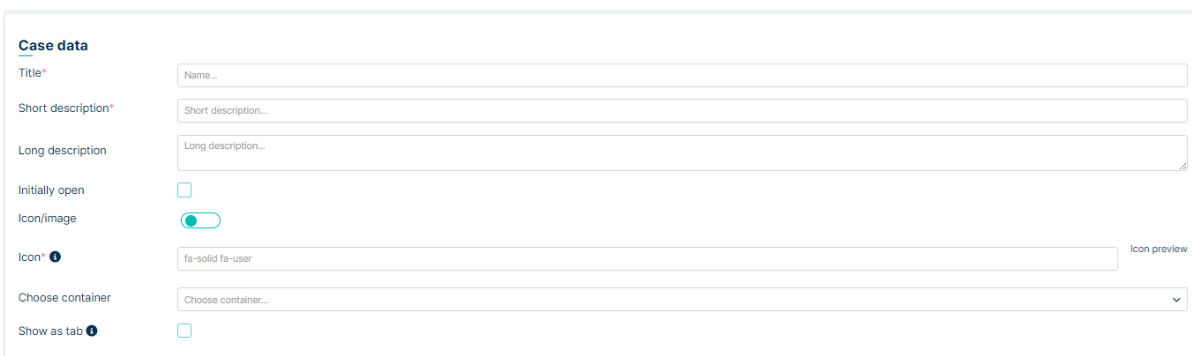
and 

buttons

Let's click on  button to open Create Case window



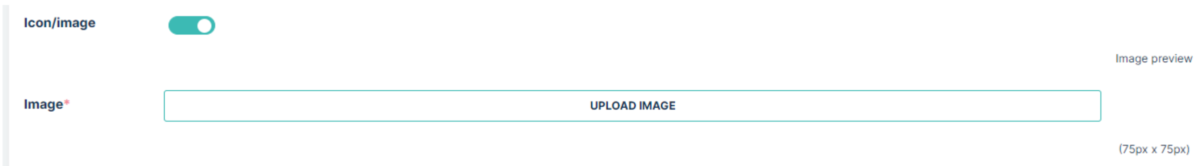
First section is **Case data**.



You'll find here required fields like "Title" and "Short description". There is also optional "Long description" field. Below that, there is an "Initially open" checkbox, which you can select if you want the case to open by default in the Customer view.

To set an icon or image for the case, click on the "Icon/Image" button. If you choose "Icon," an additional field will appear:

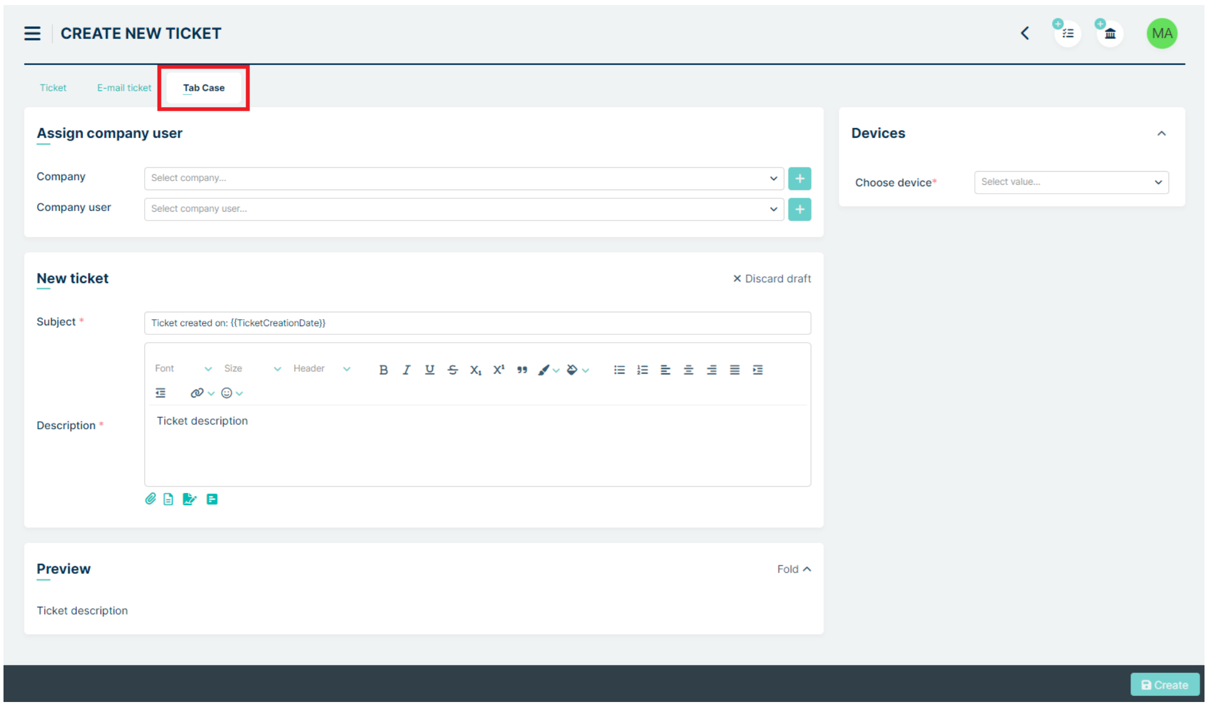
If you choose to use a picture for the case, an additional field will appear:



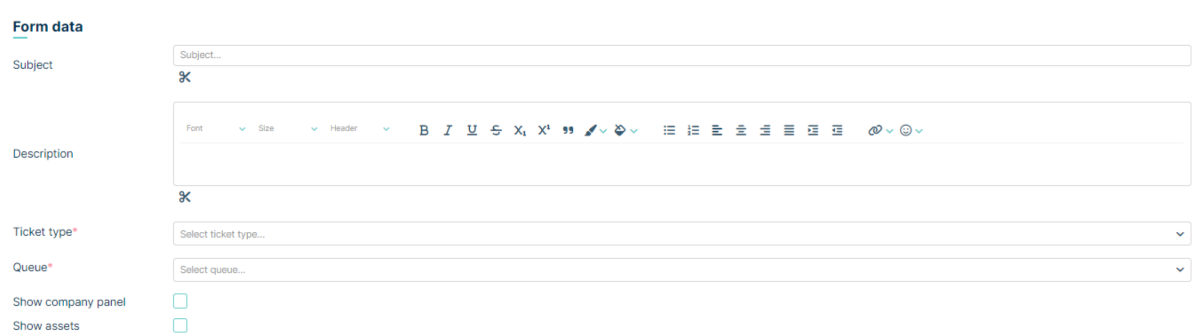
As described in the Container section, you can add icons and pictures.

The next field is "Choose container," where you can associate your case with a specific container.

Next we have "Show as tab" checkbox. When this setting is enabled, our case will appear as a tab for the Agent when he creates the ticket.



The next section is **Form data**.



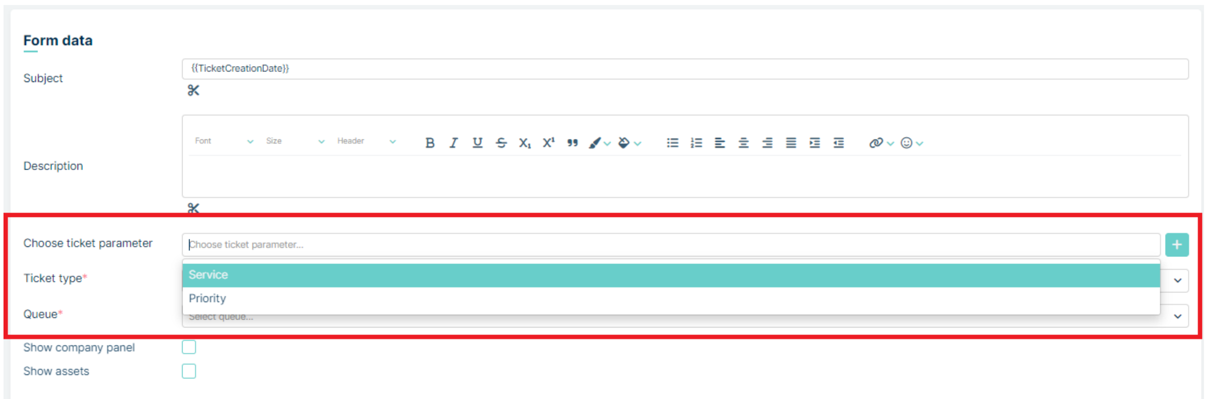
Here, we can prepare a template for our case by setting the ticket Title, Description, Ticket Type, and Queue. We can also manage the visibility of the Companies and Assets panels in the case through checkboxes located at the bottom of this section. In the Title and Description fields, we can use snippets (scissors icon), which are placeholders for values that will be filled in after the ticket is created.

Example: We want our ticket to have the title "Ticket created on:" followed by the creation date. To do this, fill in the title with "Ticket created on:" and then click on the scissors icon located below this field. Next, from the "Ticket" section, select the "Creation date" option. When creating a ticket, our title will take the form: "Ticket created on: {{TicketCreationDate}}". However, after its creation, the snippet {{TicketCreationDate}} will be replaced with the actual ticket creation date.

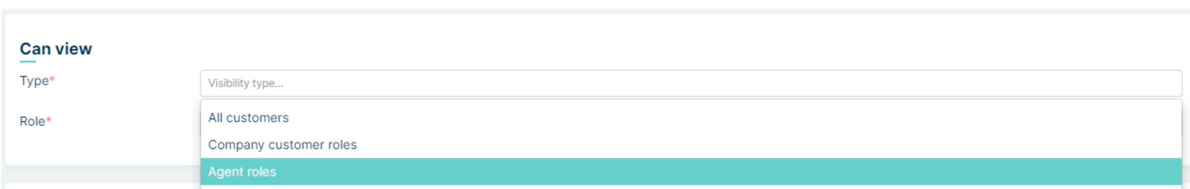
You can use multiple types of snippets, including those related to custom fields.

When you fill Ticket type, you will see field "Choose ticket parameter." Here you can select additional parameters for the case template, such as Service and Priority. To add each parameter, follow these steps:

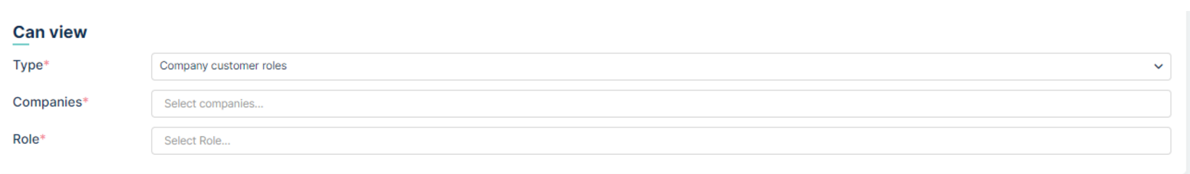
- Choose the parameter from the dropdown labeled "Choose filter parameters."
- Afterward, click on the  button located on the right



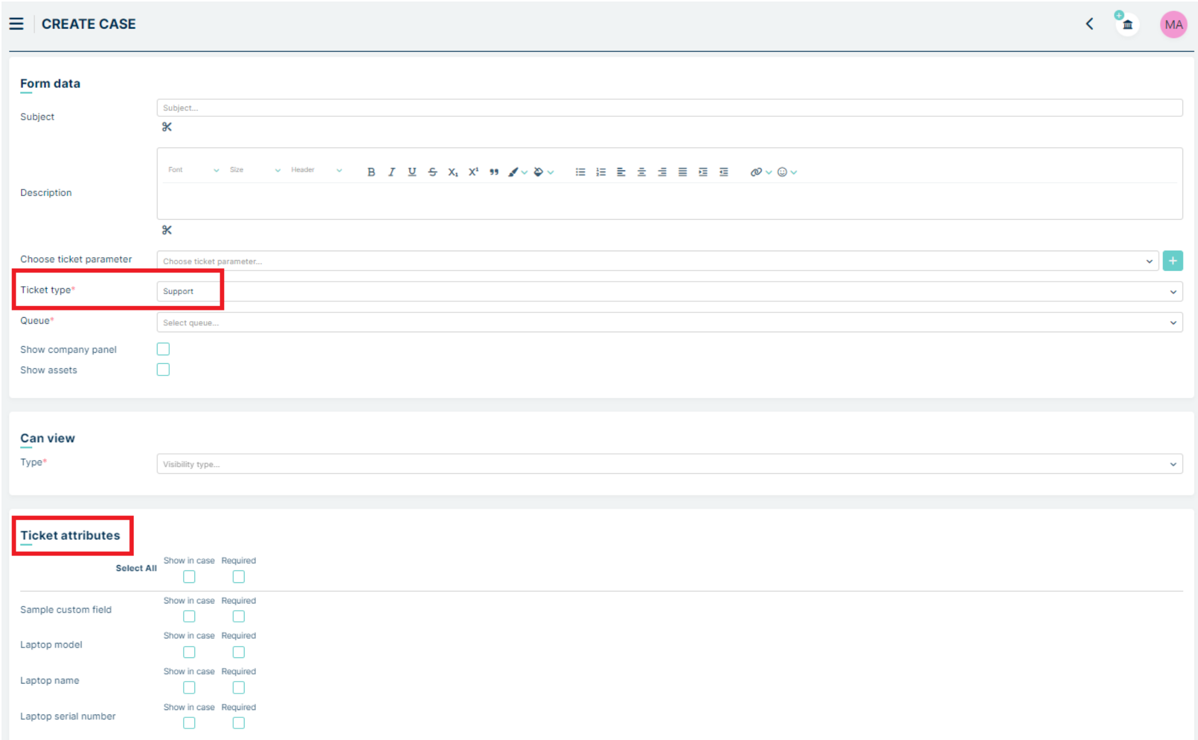
Another section is labeled **Can view**.



In this section, you can configure visibility settings for either all customers or specific Company customer roles and Agent roles.

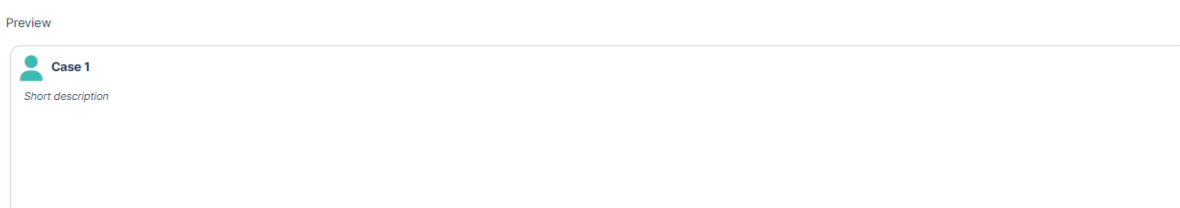


The last section is **Ticket attributes**, and it appears when we select a Ticket type in the "Form data" section.



In this section, custom fields associated with the selected Ticket type are visible. Here, we can set which of these fields should be visible in our ticket and which are required. These custom fields are visible to all users specified in the "Can view" section, regardless of the permissions granted to them in the Tickets -> Custom fields section.

At the bottom of the page, you'll find a "Preview" window. Here, you can preview how your case will be displayed in the Customer Portal for Customer role.



The final step is clicking on the 

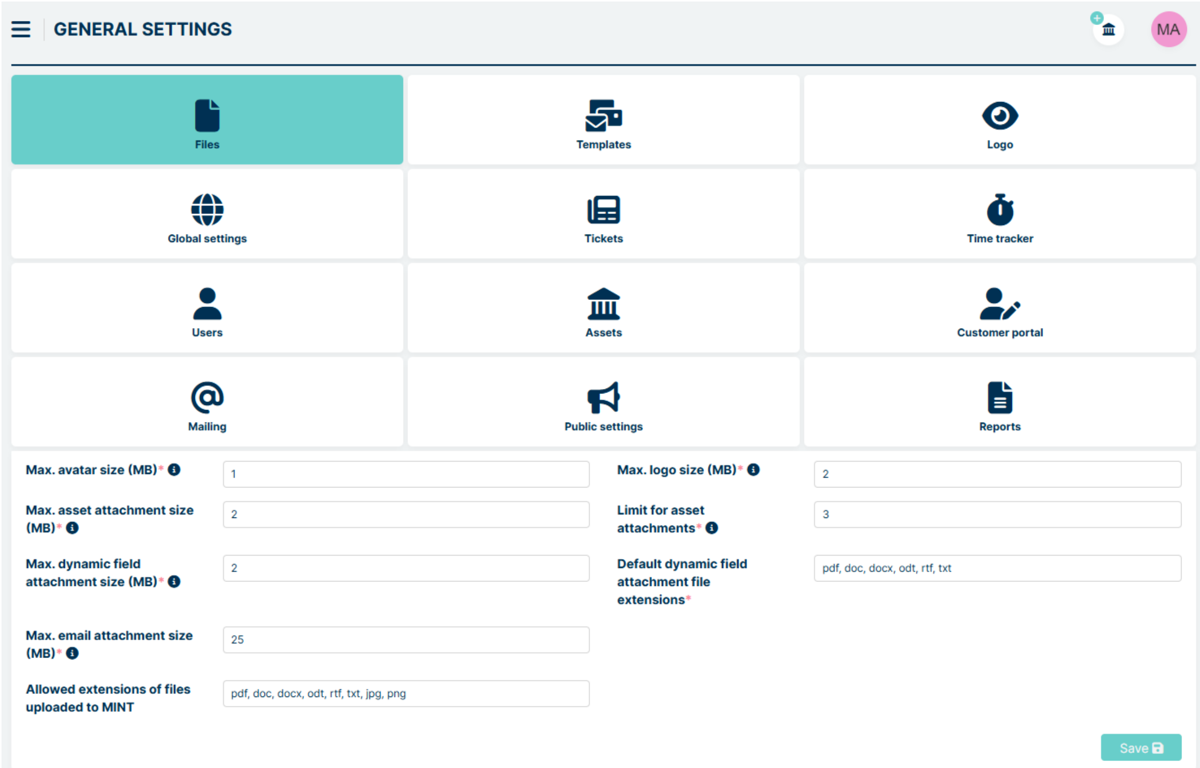
button located in the bottom right part of the window. Upon clicking, the case will be saved, and you will be directed to the Case list.

The rest part of the Customer Portal functionality has beed described in Customer section in this documentation.

5.21 SETTINGS

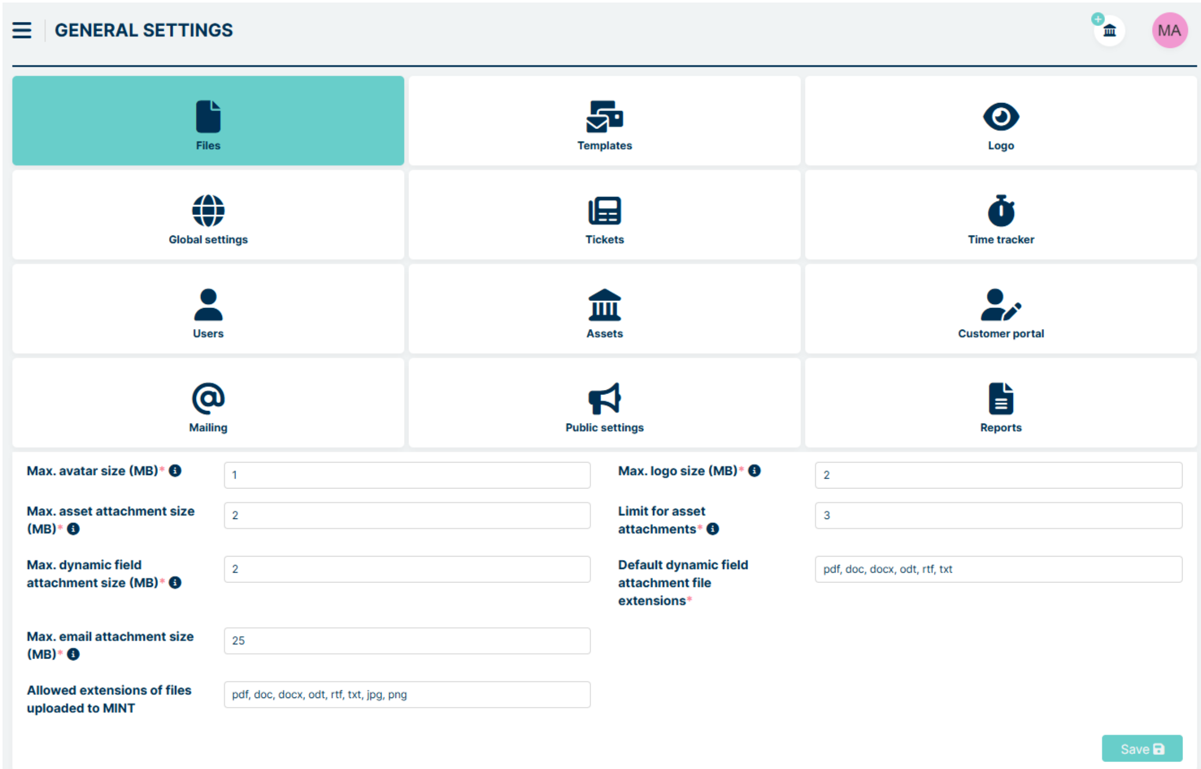
5.21.1 GENERAL

In this place of the system, you will find some subsections with configuration parameters you can adjust. There are five sections: 'Files' (default place after you go to Settings > General), 'Templates', 'Logo', 'Global settings', 'Tickets', 'Time Tracker', 'Users', 'Assets', 'Customer portal', 'Mailing', 'Public settings' and 'Reports' .



FILES

This is the default view once you go to the 'General' part of the 'Settings' section. Here you can change the sizes and limits for Avatar, Logo and Attachments. Limits are specified in megabytes (MB), except limit for asset attachent specified in numbers.



Max. avatar size (MB): the maximum size of an Avatar user can upload to profile information in the 'User profile' part of the account. Can be set from 1 to 5 MB.

Max. logo size (MB): the maximum size of a logo (both: sidebar and login page) you can upload in the 'Logo' section of the 'General' part of the 'Settings' section. Can be set from 1 to 5 MB.

Max. asset attachment size (MB): the maximum size of each attachment that can be added to an asset. Can be set from 1 to 30 MB.

Limit for asset attachments: you can define the number of possible attachments that can be added to each asset in your Mint Service Desk system. You can set it up from 1 to 5.

Max. dynamic field attachment size (MB): the maximum size of each attachment that can be added to dynamic field. Can be set from 1 to 30 MB.

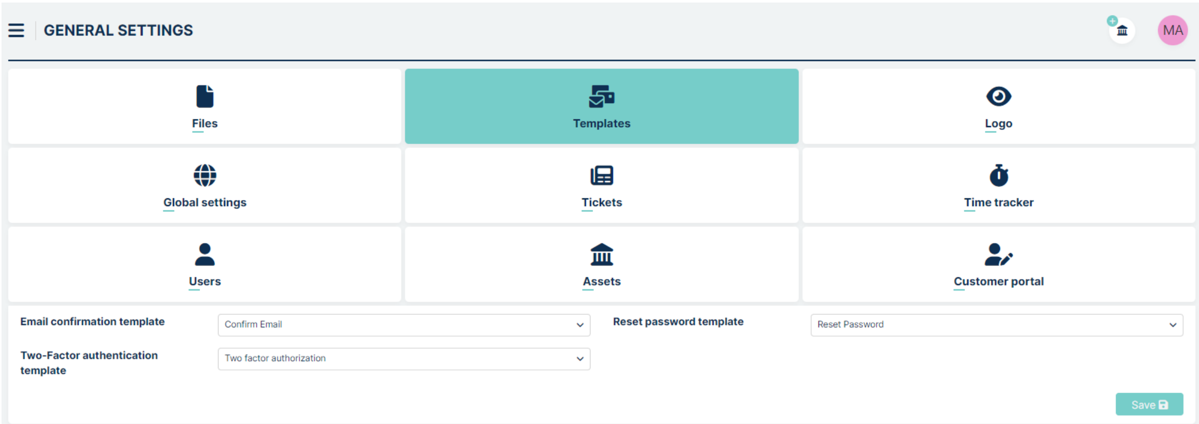
Default dynamic field attachment file extensions: A list of all extensions that can be used in the attachments. For example: pdf, doc, docx, odt, rtf, txt, etc.

Max. email attachment size (MB): the maximum size of each e-mail attachment that can be downloaded to MINT from external e-mail message in ticket details. Can be set from 1 to 50 MB.

Allowed extensions of files uploaded to MINT: List of all allowed file extensions uploaded to MINT.

TEMPLATES

In this place, you can select templates for email messages that are sent by the system. Those are: 'Email confirmation' and' Reset password'.



At the very beginning of this guide, in the 'Basics' part, you already selected a template for the email confirmation.

Always remember that before selecting a new template here, first you need to create some components, then create a template (with those components). It was already described in Channels > Components and Templates parts of this guide.

Once you save a new template it will be available to choose from the dropdown lists.

You can set 3 types of email message templates.

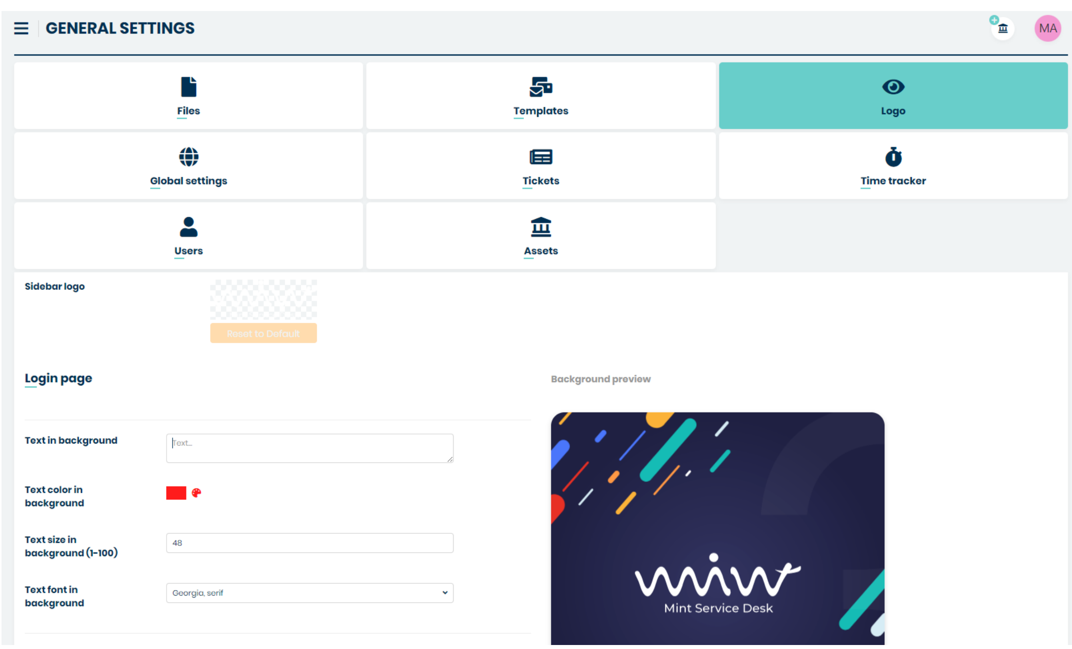
Email confirmation: right here you can select a template which will be used for the email sent to a user, right after he signed up to the Mint Service Desk, to confirm a new account.

Reset password: this template will be used for the email which will be sent to a user once he chose the option 'Forgot my password' on the login screen.

Two-Factor authentication: in this setting you can choose the temlate that is used in verification code email message in Two-Factor autorization method

LOGO

If you want to change the logo on the sidebar or on the login page for your company logo, it is possible to do it in this place.

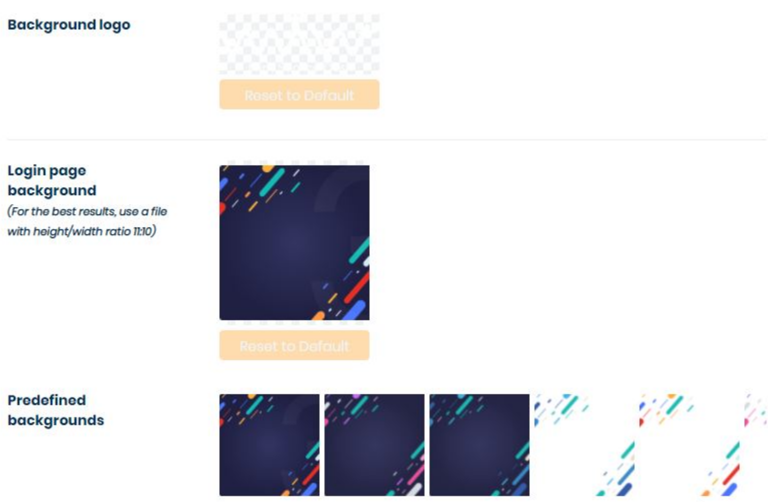


It is easy to change the branding of your business in **MINT Service Desk** by uploading the files. Click on the image located on the right side of the "Sidebar logo".

It will open your Operational System file explorer where you need to find and select the picture you want to upload and set as a new sidebar logo. Once selected click 'Open' and the picture will be uploaded.

Then you can add: **Text in background**, **Text color in background**, **Text size in background (1-100)** and **Text font in background** to be displayed on the login page.

Next, you can add is **Background logo** and **Login page background**. Click on the image located on the right side of the "Background logo" or "Login page background".



For images, it is better to upload a transparent background image and for "Login page background" it is better to use a file with a height/width ratio of 11:10.

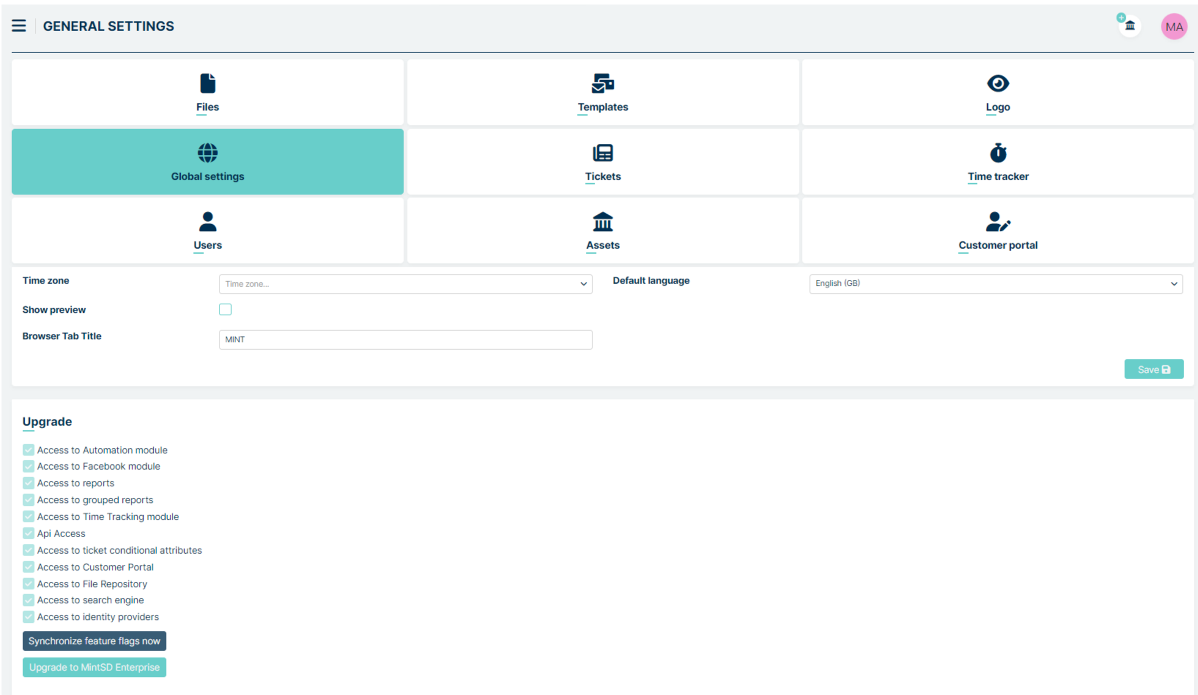
If you prefer the default **MINT Service Desk** images you can always reset both images to default values by clicking on the button 

If you select the wrong type of file (e.g. .pdf by mistake) you will receive the 'Invalid file' error message.

If you select an image with the size exceeding the limit set in the 'Files' section, you will also receive the same error message. In that case, you need either choose a smaller image or go to the 'Files' tab and raise up the size limit.

GLOBAL SETTINGS

In this place you can change some global settings such as: time zone, default language, tickets and articles preview options.



Time Zone: the default time zone for the system.

Default language: the default language for system users.

Browser Tab Title: allows you to specify what will be displayed in the Tab Title

Browser Tab Title: here you can set the default theme that will be set for new users of the system

Domain adresses regex Here you can set a regular expression that will filter e-mail addresses when sending reports by e-mail (sending to e-mails matching the regex will be blocked - additional settings related to this can be found under Settings => Reports tab)

Upgrade

This section contains information about the modules that are locked in the free version. When you see means that you have access to this module.

Currently available modules are:

- Access to Automation module
- Access to reports
- Access to grouped reports

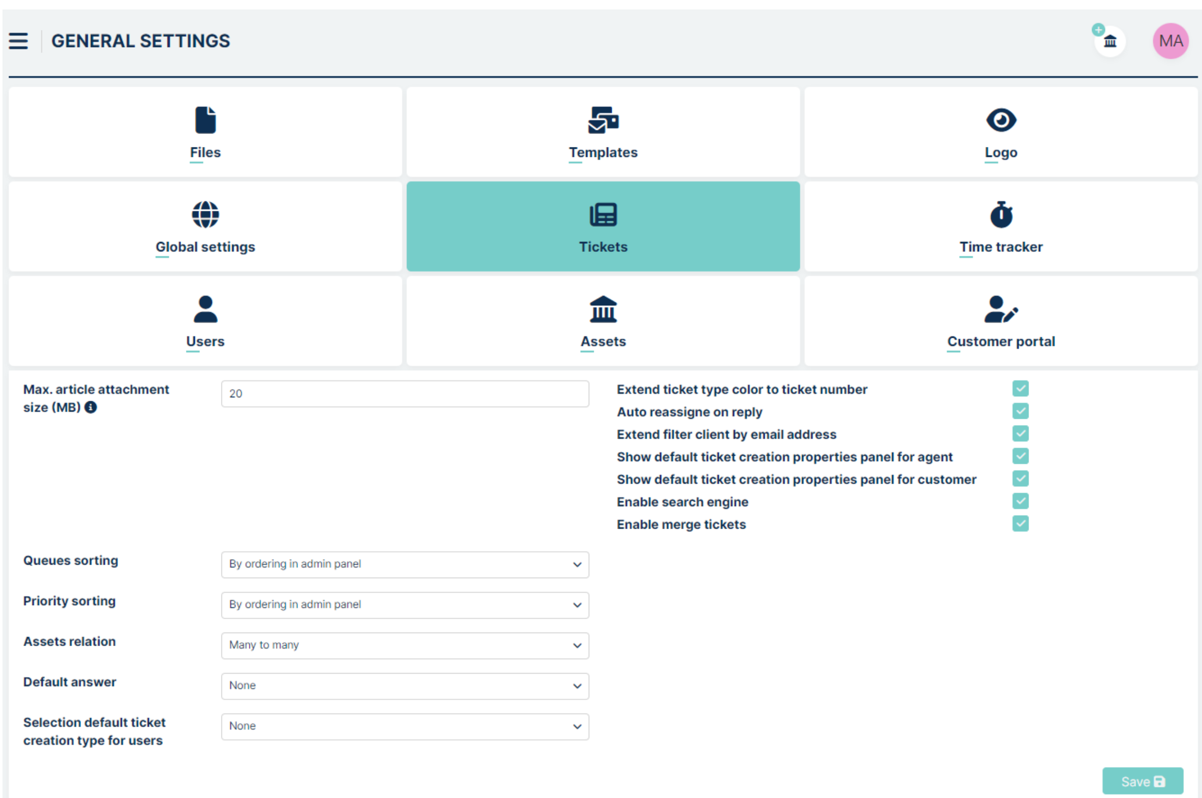
- Access to Time Tracking module
- Api Access
- Access to ticket conditional attributes
- Access to Customer Portal
- Acces to File Repository
- Acces to search engine
- Access to identity providers
- Access to surveys
- Access to content manager
- Access to SQL reports
- Access to Approvals module

When the module has been purchased and there is still a blank field instead of checkmark, press Synchronize feature flags now button to refresh the feature flags.

When you want to upgrade your version to Enterprise, press Upgrade to MintSD Enterprise button.

TICKETS

In this place you can choose some additional settings for Tickets, for example set up the maximum size for Ticket attachment.



On the left side we have:

Max. article attachment size (MB): it allows you to set the maximum size of an attachment in megabytes.

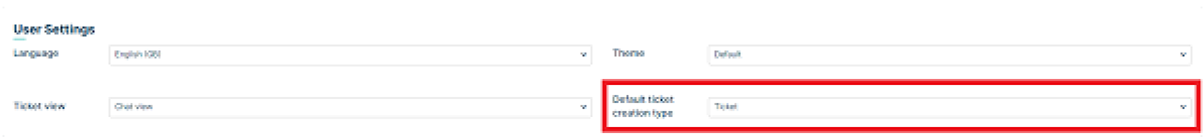
Queues sorting: This option allows you to choose whether you want to sort the queues or By ordering in admin panel.

Priority sorting: This option allows you to choose whether you want to sort priorities alphabetically or By ordering in admin panel.

Assets relation: This option allows you to establish relationships to assets. You can choose from one-to-many or many-to-many.

Default answer: In this option there is a choice of two options "None" and "Reply all". Selecting "Reply all" means that when you enter a ticket, the system will behave as if you pressed the "Reply all" button on the last article.

Selection default ticket creation type for users: This option has two choices "None" and "Enable for agents". Selecting the first option will cause the agent to rely on the default settings and selecting the second option will appear in a new field in the agent's profile:



On the right side we have:

Extend ticket type color to ticket number: it allows you to extend the color to the ticket number. The effect of this setting can be seen on the dashboard. It is worth remembering that the ticket number will take the color that we set in Tickets / Custom fields / Tickets structure.

Auto reassigne on reply: This option allows you to determine whether a new agent should be assigned to a ticket after a response. For example: Agent 1 is assigned to the ticket, Agent 2 responds to the ticket. If the option is checked, the system assigns Agent 2 to the ticket after their response

Extend filter client by email adress This option is connected with **Company user** filter on agent and customer dashboard. Enabling this option allows you to search Company user by Name, Surname and/or email adress. Disabling it causes, that you can search only by Name and Surname

Show default ticket creation properties panel for agent This option can enable or hide default ticket creation properties panel in Agent profile, where each Agent can set personal default properties when creating new ticket

Show default ticket creation properties panel for customer This option can enable or hide default ticket creation properties panel in Customer profile, where each Customer can set personal default properties when creating new ticket

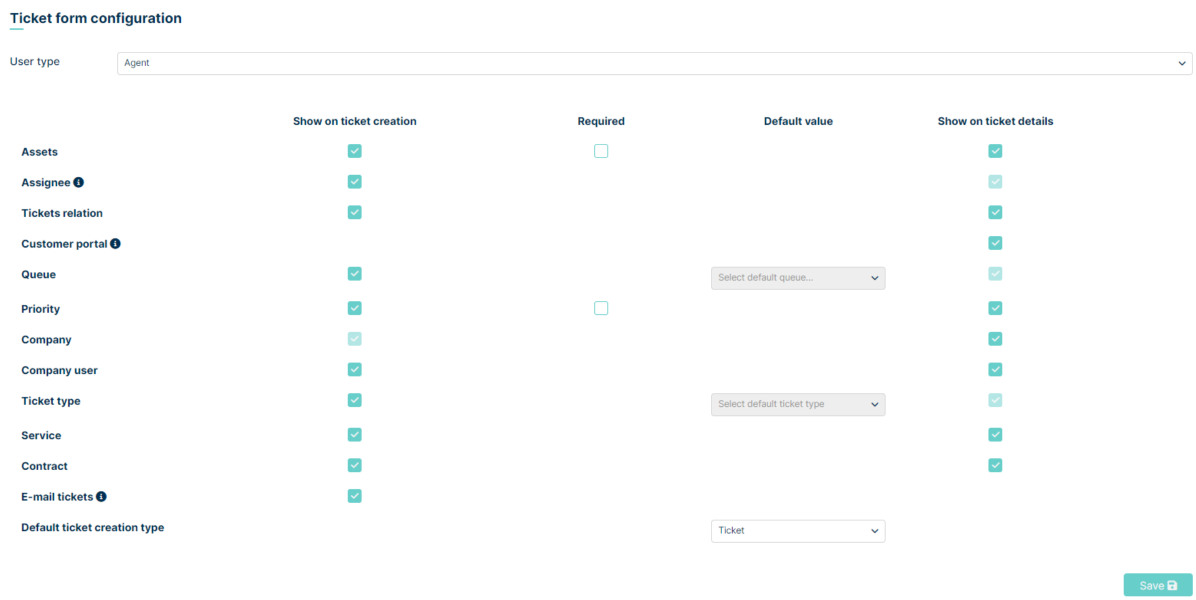
Enable search engine This option allows you to enable improved searching in filters on dashboard (available in Mint Enterprise version)

Enable merge tickets This option allows you to enable Merge Tickets in Ticket Details in Agent role

Show preview: it allows you to choose if users, by default, should have the preview of tickets and articles enabled (checked box) or not (empty box).

Show article resend button: it allows you to resend email article with sending error in Articles section in ticket details

In the **Ticket form configuration** section you can configure what things will be displayed when creating a ticket.

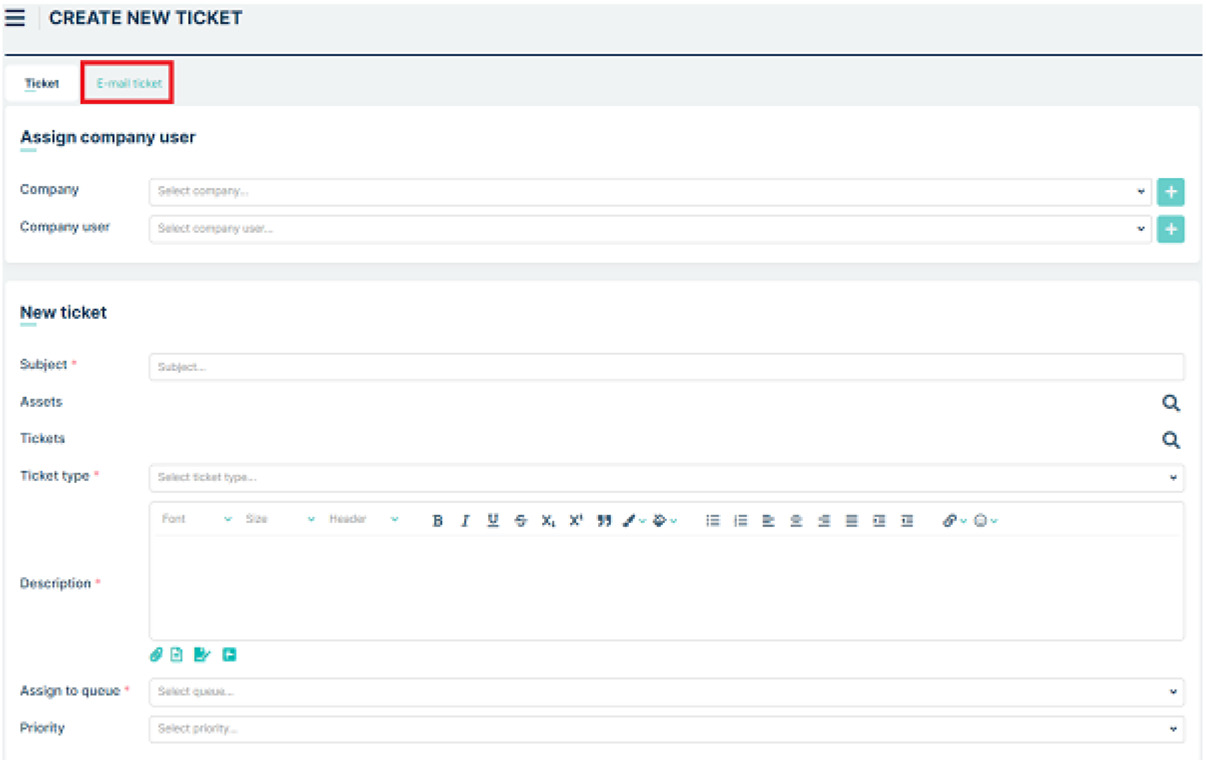


User type is about specifying who this configuration should go to: To a Customer or an Agent. You can choose which values should be visible on ticket creation and which should be visible on ticket details. Some of these settings have only one option to set.

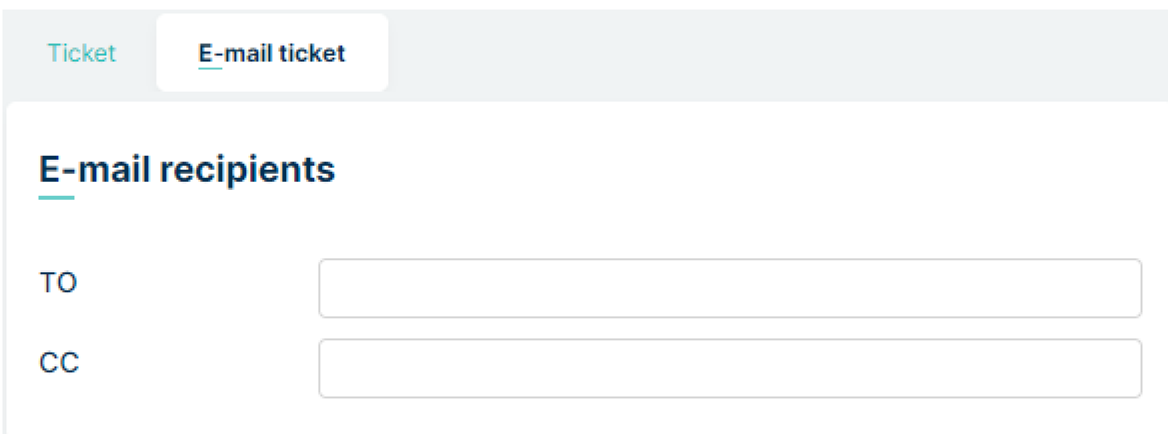
Below are the values possible to configure (can be different for agent and for customer):

- Assets
- Assignee
- Tickets relation
- Customer portal (channel in ticket details)
- Queue
- Priority
- Company
- Company user
- Ticket type
- Service
- Contract
- E-mail tickets

Checking the **E-mail tickets** option will add an additional tab when creating a ticket:



Pressing this option will change the **Assign company user** tab to **E-mail recipients** with two fields, **TO** and **CC**, in which you need to enter the e-mail addresses to which you want to send the ticket.



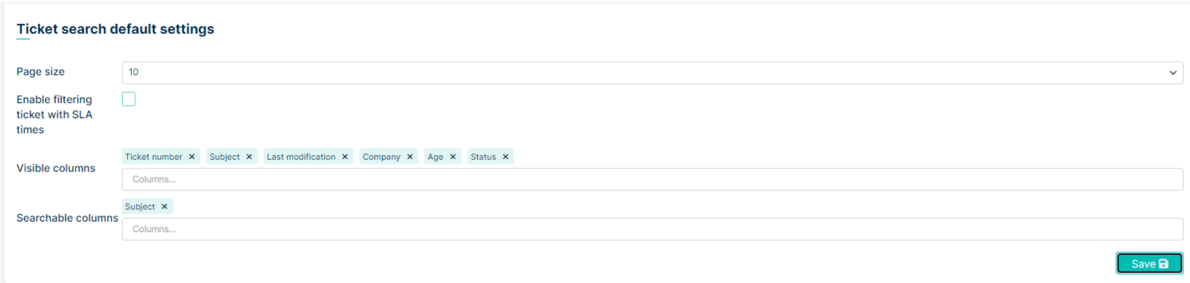
- Default ticket creation type

The selection under **Default ticket creation type** indicates which channel should be the default when creating a ticket.

You can choose some of the values are required or not (for example Assets, Priority)

If you uncheck Queue and Ticket type on ticket creation, you will have available 'Default value' column to choose default value for them.

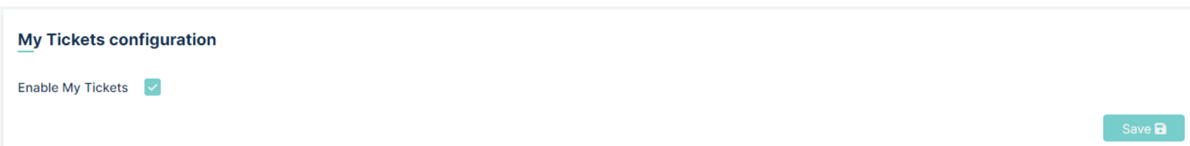
In the **Ticket search default settings** section, you can configure default settings to search for tickets.



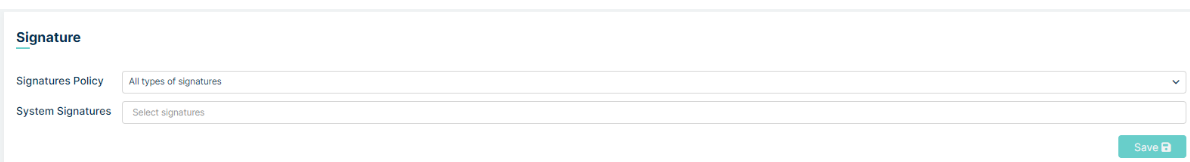
Four values are possible to configure:

- **Page size:** Allows you to determine how many submissions should be on the site.
- **Enable filtering ticket with SLA times:** Allows filtering of tickets with SLA time.
- **Visible columns:** This setting allows you to determine which columns should be visible on the dashboard.
- **Searchable columns**: This setting allows you to determine which columns should be searchable by default on the dashboard.

Section **My Tickets** you can enable or disable "My Tickets" feature in Agent and Customer



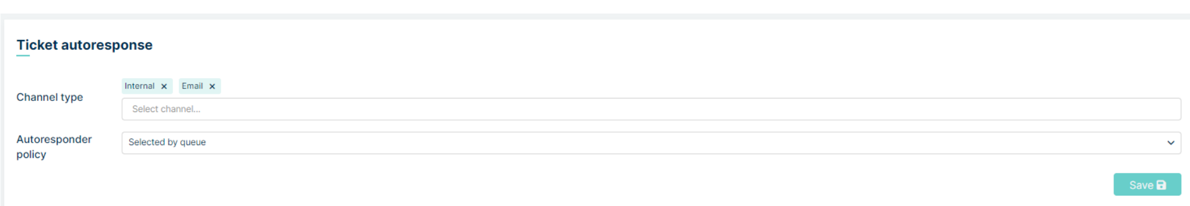
In the **Signature** section, you can configure signature settings.



Two values are possible to configure:

- Signatures Policy
  - Only System signatures - This option only allows system signatures, which are selected in the "System Signatures" option.
  - Only Queue signatures - This option allows you to select the signatures that have been assigned to given queues.
  - System na Queue - This option is a combination of Only System signatures and Only Queue signatures.
  - All types of signatures - This option allows you to select all signatures in the system.
- System Signatures - Here you assign what signatures will be referred to as system signatures.

In the **Ticket autoresponse** section, you can configure autoresponse for a ticket.

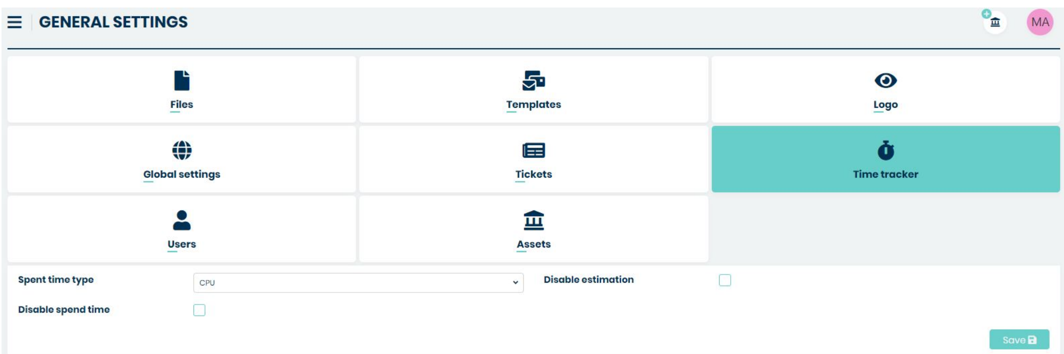


- Channel type - You choose which channel you want the autoresponse to go through.
  - Internal
  - Email
- Autoresponder policy - You select the policy for the autoresponser, that is, whether the autoresponser should be selected by queue or by admin selection.
  - Selected by queue
  - Set on admin settings
    - Autoresponder MailBox

TIME TRACKER

I this place you can edit some options for the time tracker like:

- choosing 'spent time type',
- 'disable estimation'
- 'disable spend time'



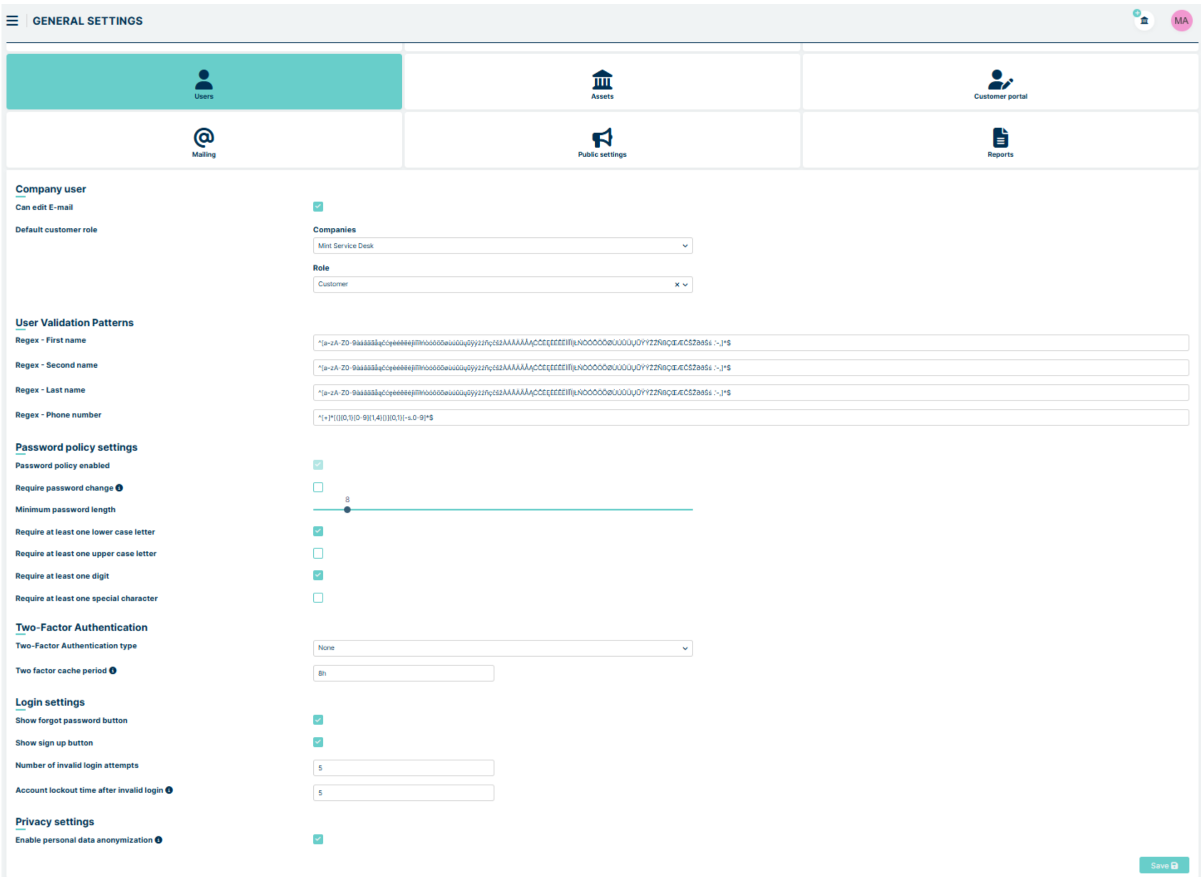
Spend time type: it allows you to change the type of time spent. You can add such types in Fields settings -> Dictionaries

Disable estimation: it allows you to disable or enable the estimation visible in the ticket preview

Disable spend time: it allows you to disable or enable the spent time visible in the ticket preview

USERS

In this place you can edit option about Users.



Company user section:

- **Can edit E-mail** - Enabling this option will allow the user to edit their E-Mail address.
- **Default customer role** - Here you can select which company and role should be automatically assigned to the new user registering via the website. Blank fields mean that the new user will be marked as Unassigned

User Validation Patterns section:

- **Regex - First name** - Here you select the regex for the first name field
- **Regex - Second name** - Here you select the regex for the second name field
- **Regex - Last name** - Here you select the regex for the last name field
- **Regex - Phone number** - Here you select the regex for the phone number field

Password policy settings - Here you can set requirements for passwords created and changed by all users, including Admin.

- **Password policy enabled** - This option is always enabled and cannot be modified
- **Require password change** - Here you can set, if user is forced by system to change current password everytime Admin updates Password policy settings
- **Minimum password lenght** - Here you can set password lenght from 6 to 30 characters
- **Require at least one lower case letter** - Here you can set requirement to use at least one lower letter in password

- **Require at least one upper case letter** - Here you can set requirement to use at least one upper letter in password
- **Require at least one digit** - Here you can set requirement to use at least one digit in password
- **Require at least one special character** - Here you can set requirement to use at least one special character in password

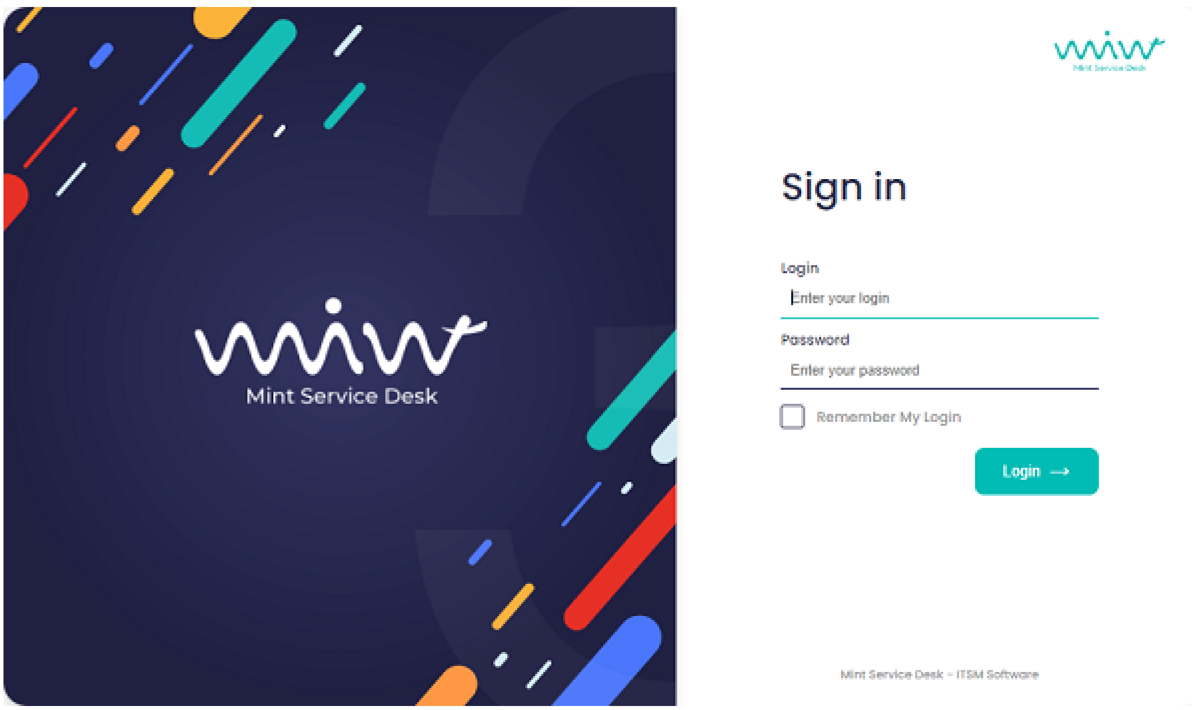
Two-Factor Authentication section:

- **Two-Factor Authentication type** - Here whether to have two-step authorization or not. At this time, only the email option is available.

Login settings section:

- **Show forgot password button** - Unchecking this checkbox will remove the "Forgot my password" option from the login screen.
- **Show sign up button** - Unchecking this checkbox will remove the "Sign up" option from the login screen.

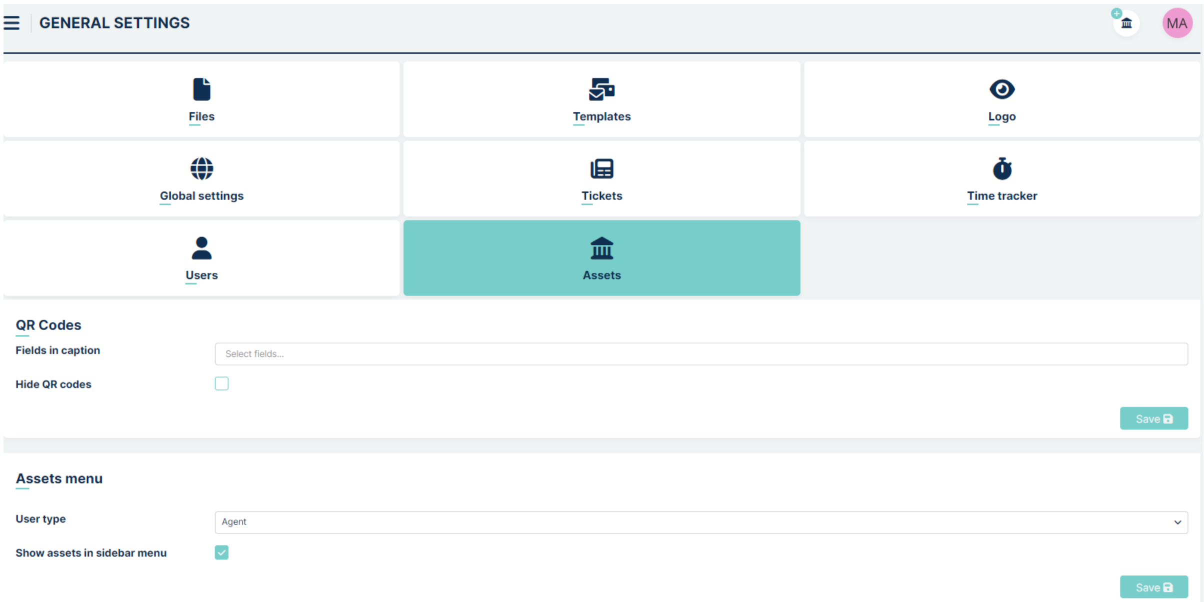
This is what the login screen looks like after unchecking both checkboxes:



Privacy settings - Here you can enable or disable functionality to anonymize user data in user profile

ASSETS

In this place you can edit option about Assets.



In the **QR Codes section** you can edit what information should be included in the QR Code printout.

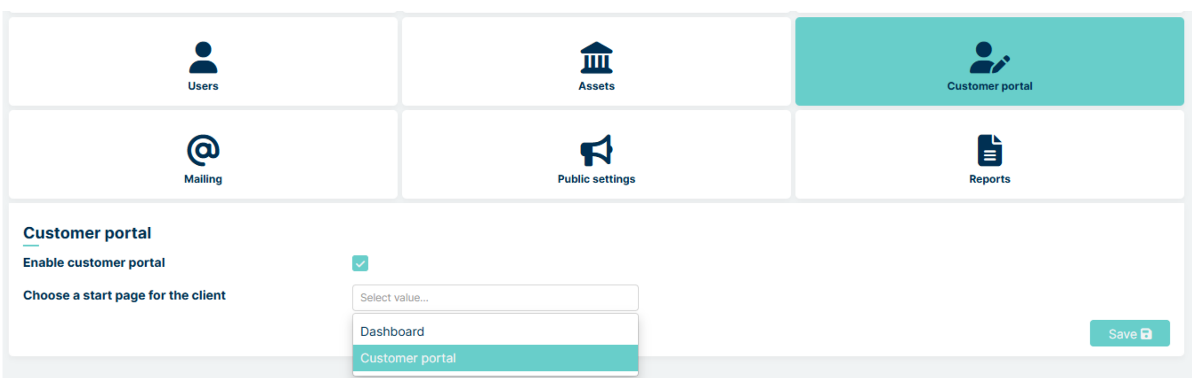
If you don't need the QR code in assets then you can disable it by disabling **Hide QR codes** checkbox

Assets menu section:

- **User type:** Here you choose who you want the setting to refer to. You can choose between agent and customer.
- **Show assets in sidebar menu:** Here you choose whether the asset should be visible on the sidebar.

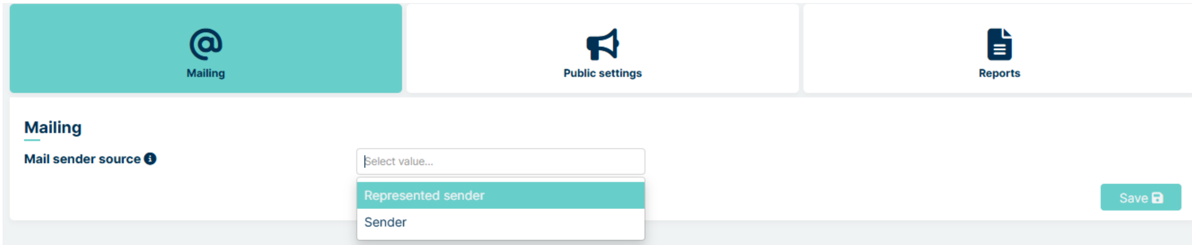
CUSTOMER PORTAL

Here you can set whether the Customer Portal (tab in the Customer profile) is to be visible or not. In addition, you can select whether the Dashboard or the Customer Portal should be visible by default when the Customer is logged in



MAILING

In this part of the system, there is a setting for tickets created from the e-mail channel. In case that ticket is sent on behalf of another person (functionality for example in Outlook), we decide whether the ticket is to be set up on the person who sends the email or the person on whose behalf the email is sent. The person we set up is assigned as Customer in the ticket.

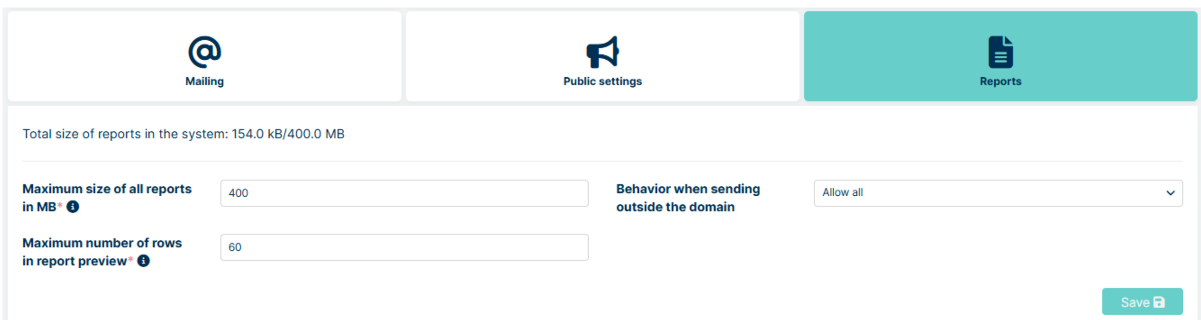


PUBLIC SETTINGS

The settings of this tab are related to the Whistleblower system (different product of OPGK Software) and a description can be found in the documentation for this system. These settings are not used in Mint Service Desk.

REPORTS

In this place you can edit option about Reports.



Reports section:

- **Maximum size of all reports:** Here you can set the maximum permissible size of all reports, beyond which the system will prevent further reports from being generated. The current report size is displayed in the line above this setting
- **Maximum number of rows in report preview** Here you can set the maximum number of rows presented when the Agent clicks on the report preview
- **Behavior when sending outside the domain:** Here you can set whether reports are to be:

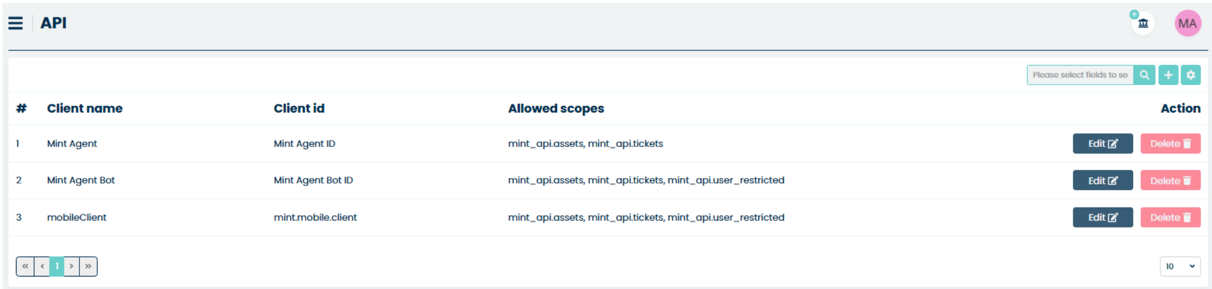
a) sent to all email recipients

b) sent taking into account the regex filter from the Settings => Global settings tab from the Domain adresses regex field

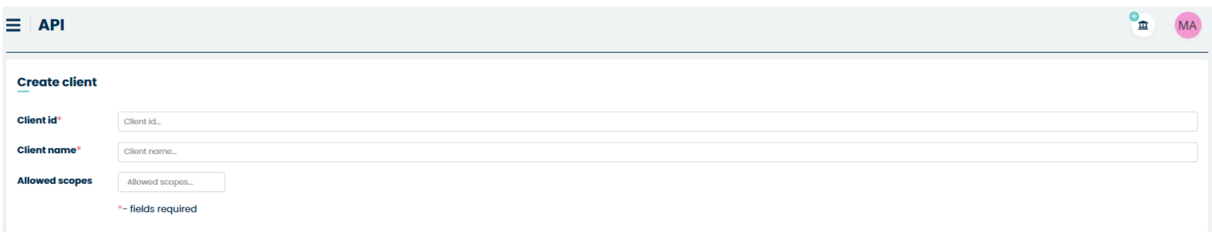
c) not sent (blocked)

5.21.2 API

In this section, you can view, create, edit, or delete all the API Clients for Mint Service Desk.



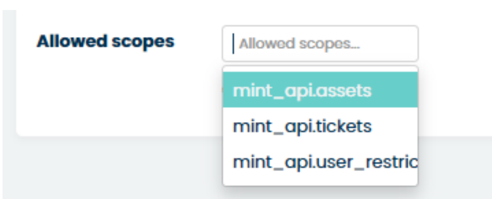
To create a new API client, click on the  button located on the right side, next to the search field. You will be moved to the 'API' view where you need to fill some necessary data.



Enter the following required information:

- **'Client id'** – API Client identifier,
- **'Client name'** – API Client name.

You also need to choose the desired scopes (**'Allowed scopes'**). Those scopes specify the set of endpoints to which the API Client will also have access to.



In the Mint Service Desk, you have three available scopes to choose from:

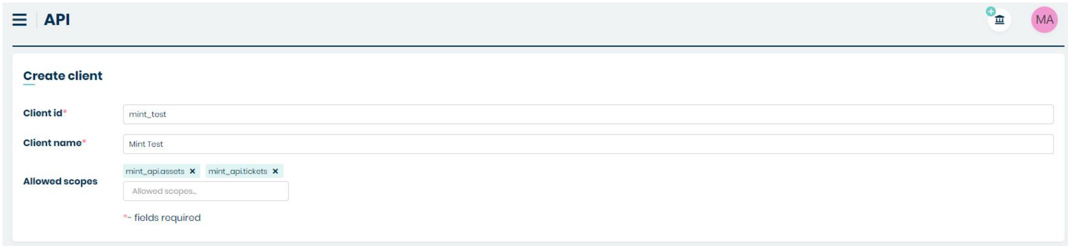
- **'mint_api.assets'** – gives access to edition and viewing the MINT Service Desk assets
- **'mint_api.tickets'** – gives a possibility to view information about tickets, add comments and make other changes
- **'mint_api.user_restricted (Require user)'** – adds additional possibilities to the scopes mentioned above. It unblocks, among others, creating tickets and adding new articles

If you select 'mint api.assets' and/or 'mint api tickets' you will be able to save the new API Client. To do so just click the  button.

CREATING A REQUEST

To create a query you first need to prepare a client. To do this, press  button.

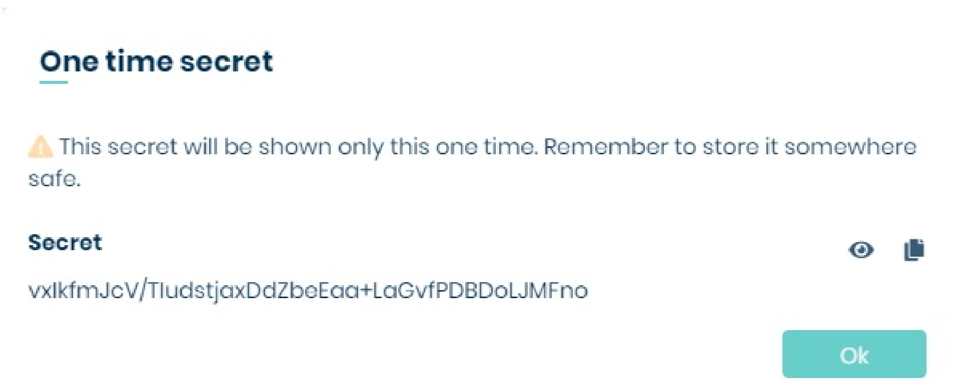
The client allows you to log in in a machine to machine fashion. That is, using client_id and client_secret we are able to log into MINT and execute any query.



- Client id (Remember not to use spaces between words but use e.g.'_')
- Client name
- Allowed scopes (We will focus on two scopes: mint.api_assets and mint_api.tickets)

Scope is the space to which integrators have access via a token that will be generated.

After adding the scopes and pressing  button, a Client secret is generated which needs to be copied and saved. Remember that when the secret is generated again, the secret will no longer be valid.

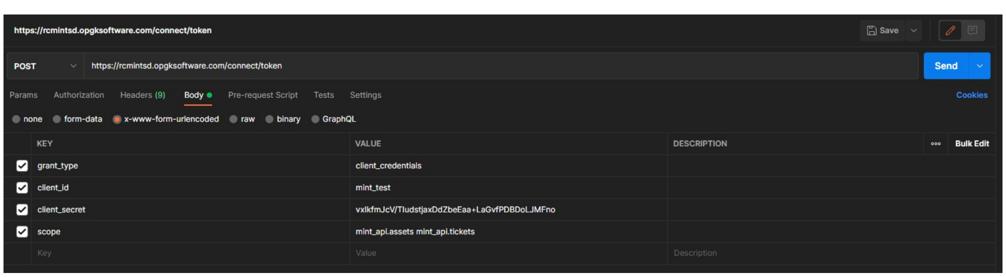


I will use Postman to get the token. To get started, turn on the program and add a new connection. From the available options, select the POST method. And in place of address, type the address to your mint and add '/connect/token' (in my case it will be 'https://rcmintsd.opgksoftware.com/connect/token')

Now you need to configure four fields:

- **grant_type** - here add your client_credentials
- **client_id** - here, use the client_id you provided during API configuration.
- **client_secret** - here use the client_id that I got after configuring the API.
- **scope** - here, use the scopes you specified when configuring the API.

Remember to do this in 'x-www-form-urlencoded'.

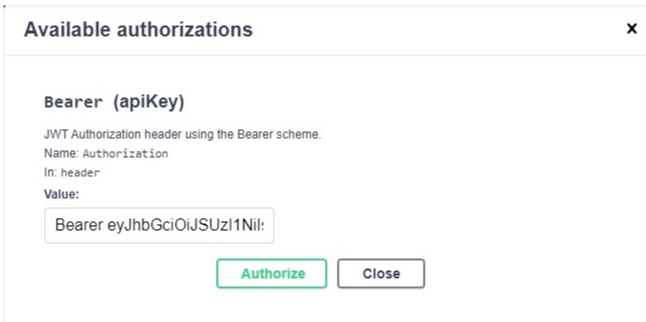


Now press the 'Send' button to receive the token.

Copy the token received and you can test it on your_address_to_mint/swagger/index.html

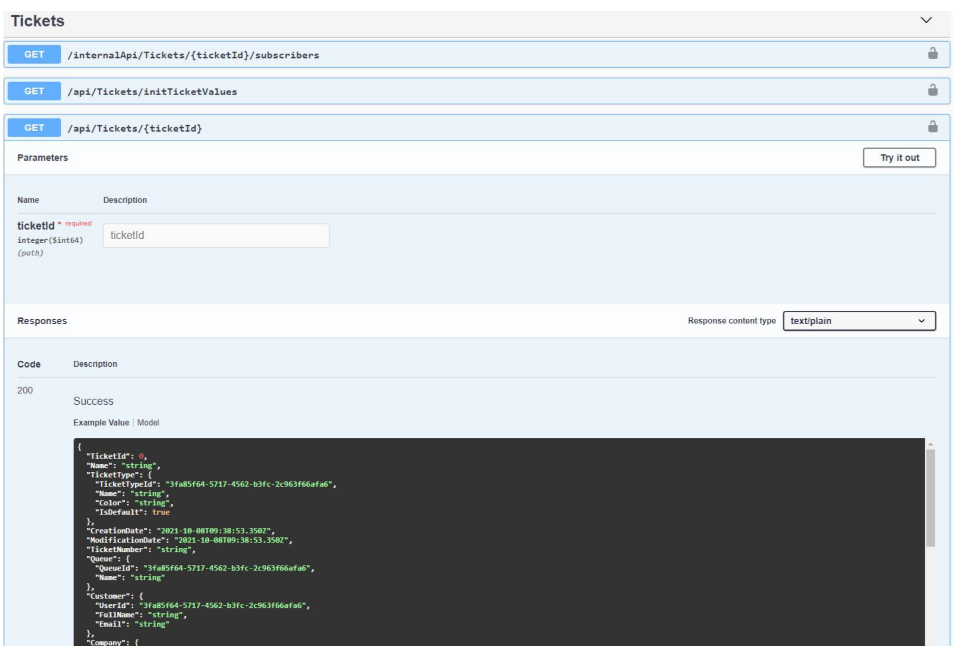
To start testing first press 

button. In the field that appears, type 'Bearer your_token'



Then press 

button again.



Now you can test if the token works. Go below to the 'Tickets' section and select '/api/Tickets/{ticketId}'. You will see the example that will be returned after testing. Press 

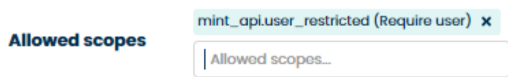
button. Fill in the 'ticketid' field by typing the id of the ticket you want to preview. Then press 

button.

You don't have to test it on swagger. You can do the same in Postman by selecting the GET method and typing 'page_address/api/Tickets/{ticketId}' Example: https://rcmintsd.opgksoftware.com/api/Tickets/{ticketId}.

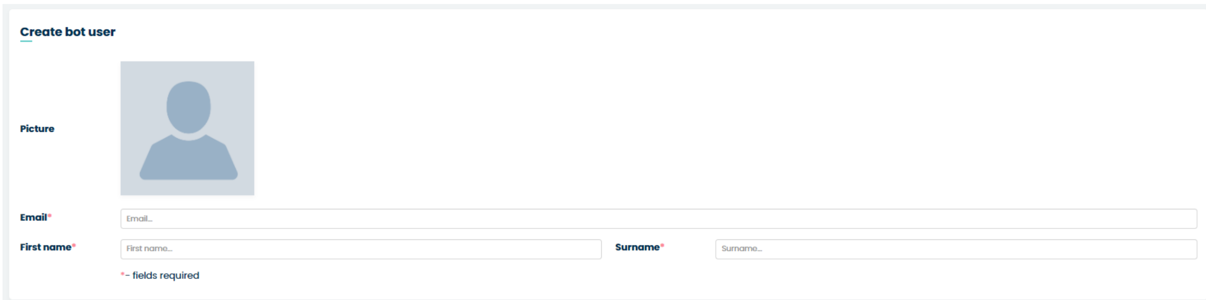
CREATING A BOT USER

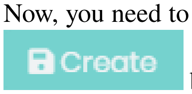
While creating an API Client you can select the third 'Allowed scope': **'mint_api.user_restricted (Require user)'** from the list of available scopes.



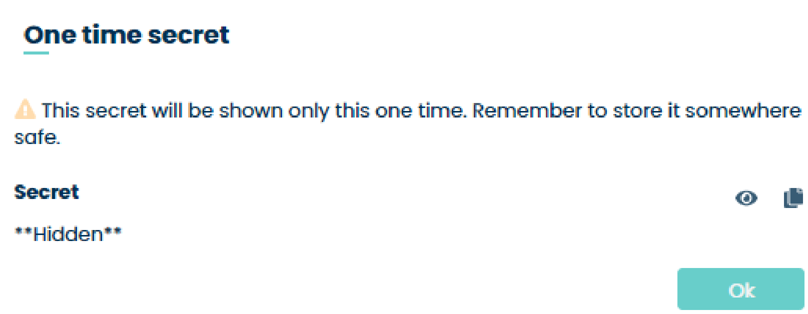
If you do that you will have to create a Bot user. Bot account is a type of account on behalf of which requests that require a user are sent.

The moment you select the abovementioned scope a new part of API view 'Create bot user' will be loaded.



Now, you need to type 'Email' (the correct email address), 'First name' and 'Surname'. Once you finish, click on the 

button. You will see an additional window 'One-time secret'.



By default, the 'Secret' is hidden. To see its content, you need to click on the icon. Now write down, remember, or copy the 'Secret'. You also can click the icon to copy the secret to your clipboard and paste it e.g., to some text editor.

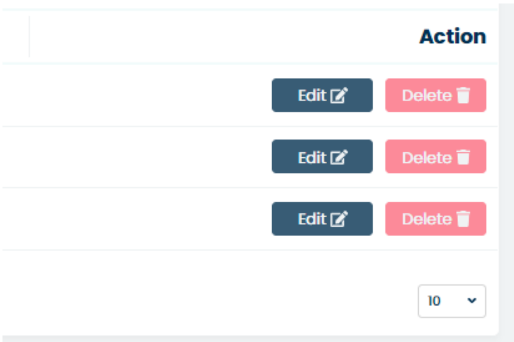
A secret is basically a key registered for the calling web service.

Once you saved this secret just click Ok button and API Client (with Bot user) will be created.

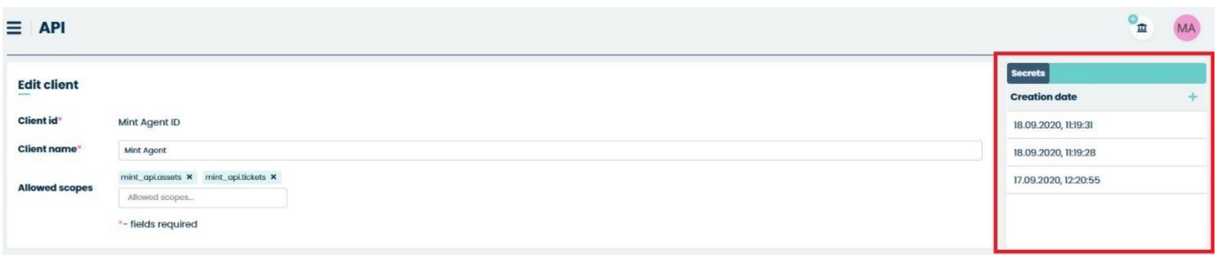
After creating a new API Client, you can always either change anything inside it (

button) or even delete it from the system (

button).



When you decide to edit the content of API Client you will see that on the right side there is a new section called ‘Secrets’. Right here you will see the list of ‘Secrets’.



Here, you can generate a new secret. Simply click the + button and copy/write down/memorize the secret just like you did when you were creating a Bot user.

You can also delete any of them by moving the mouse cursor over one desired position. A new ✖ button will appear. Just click on it and the secret will be deleted.