
MintSD

Release 3.3.0

OPGKSoftware

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CONTENTS

| | | |
|----------|---|-----------|
| 1 | INTRODUCTION | 1 |
| 1.1 | MINT SERVICE DESK | 1 |
| 1.2 | PROFESSIONAL SERVICES | 2 |
| 2 | SYSTEM REQUIREMENTS | 3 |
| 2.1 | HARDWARE | 3 |
| 2.2 | SOFTWARE | 3 |
| 3 | GETTING STARTED | 5 |
| 3.1 | SCRIPT-BASED INSTALLATION | 5 |
| 3.1.1 | Installation of dependencies | 5 |
| 3.1.2 | Starting new installation | 6 |
| 3.2 | DOCKER-BASED INSTALLATION | 6 |
| 3.2.1 | CONTENT OF services.yml FILE | 6 |
| 3.2.2 | Complementing environmental variables | 6 |
| 3.2.3 | Completing the secrets | 7 |
| 3.2.4 | Password encryption keys | 7 |
| 3.2.5 | Starting up services | 7 |
| 3.3 | FIRST LOGIN | 7 |
| 3.4 | UPGRADING | 12 |
| 3.5 | BACKUP AND RESTORE | 12 |
| 3.5.1 | CREATE BACKUP | 12 |
| 3.5.2 | RESTORING DATA | 13 |
| 3.6 | SSL CERTIFICATES | 13 |
| 3.6.1 | Format of certificates | 13 |
| 3.6.2 | Generating self signed certificates | 14 |
| 3.6.3 | Certificate replacement in docker secret | 14 |
| 3.7 | USING LET'S ENCRYPT - FREE SSL CERTIFICATES | 14 |
| 3.7.1 | Automatic certificate upgrade | 15 |
| 3.8 | REVERSE PROXY | 15 |
| 3.8.1 | Configuration of redirections | 15 |
| 3.8.2 | SSL Configuration | 16 |
| 3.8.3 | Reverse proxy on the host machine | 16 |
| 4 | WEB INTERFACE | 19 |
| 4.1 | LOGIN PORTAL | 19 |
| 4.1.1 | SIGN IN | 19 |
| 4.1.2 | FORGOT MY PASSWORD | 20 |
| 4.1.3 | SIGN UP | 20 |
| 4.2 | BASICS | 21 |

| | | |
|----------|----------------------------------|------------|
| 4.2.1 | PROFILE | 22 |
| 4.2.2 | NOTIFICATIONS | 25 |
| 4.2.3 | SIGN OUT | 26 |
| 4.3 | CLIENT PORTAL | 27 |
| 4.3.1 | CUSTOMER PORTAL | 27 |
| 4.3.2 | DASHBOARD | 31 |
| 4.3.3 | NEW TICKET | 35 |
| 4.3.4 | TICKET DETAILS | 39 |
| 4.3.5 | MY TICKETS | 46 |
| 4.3.6 | ASSETS | 46 |
| 4.3.7 | MY ASSETS | 50 |
| 4.3.8 | KNOWLEDGE BASE | 50 |
| 4.3.9 | ACTIVITIES | 53 |
| 4.4 | AGENT PORTAL | 57 |
| 4.4.1 | DASHBOARD | 57 |
| 4.4.2 | NEW TICKET | 61 |
| 4.4.3 | TICKET DETAILS | 66 |
| 4.4.4 | MY TICKETS | 97 |
| 4.4.5 | WIDGETS | 97 |
| 4.4.6 | NEW ASSET | 99 |
| 4.4.7 | ASSETS | 101 |
| 4.4.8 | MY ASSETS | 106 |
| 4.4.9 | COMPANIES | 106 |
| 4.4.10 | USERS | 108 |
| 4.4.11 | ACCESS GROUPS | 110 |
| 4.4.12 | REPORTS | 110 |
| 4.4.13 | KNOWLEDGE BASE | 122 |
| 4.4.14 | CONTRACTS | 125 |
| 4.4.15 | ACTIVITIES | 128 |
| 5 | ADMIN PORTAL | 131 |
| 5.1 | PROFILE | 131 |
| 5.2 | DASHBOARD | 133 |
| 5.3 | USERS | 134 |
| 5.3.1 | USER MANAGEMENT | 134 |
| 5.3.2 | ROLES | 137 |
| 5.3.3 | CUSTOM FIELDS | 140 |
| 5.3.4 | USERS INTEGRATIONS | 142 |
| 5.4 | ACCESS GROUPS | 144 |
| 5.5 | COMPANIES | 149 |
| 5.5.1 | COMPANY MANAGER | 149 |
| 5.5.2 | CUSTOM FIELDS | 154 |
| 5.5.3 | COMPANY USERS | 156 |
| 5.6 | TICKETS | 157 |
| 5.6.1 | QUEUES AND PERMISSIONS | 157 |
| 5.6.2 | TYPES | 163 |
| 5.6.3 | STATUSES | 166 |
| 5.6.4 | PRIORITIES | 170 |
| 5.6.5 | TICKET NUMBER FORMAT | 171 |
| 5.6.6 | TICKET NUMBER COUNTER | 172 |
| 5.6.7 | CUSTOM FIELDS | 173 |
| 5.6.8 | TEMPLATES | 191 |
| 5.6.9 | COMPONENTS | 194 |
| 5.6.10 | DOCUMENT TEMPLATES | 197 |

| | | |
|--------|-----------------------------------|-----|
| 5.6.11 | SIGNATURES | 201 |
| 5.6.12 | CONFIGURATION | 201 |
| 5.7 | SERVICES | 203 |
| 5.7.1 | CONTRACTS | 203 |
| 5.7.2 | CONTRACTS TYPES | 207 |
| 5.7.3 | SERVICES | 208 |
| 5.7.4 | CALENDARS | 210 |
| 5.7.5 | SLA PARAMETERS | 214 |
| 5.8 | ASSETS | 217 |
| 5.8.1 | CREATING NEW ASSET | 217 |
| 5.8.2 | ASSETS MANAGEMENT | 218 |
| 5.8.3 | ASSETS DEFINITION | 225 |
| 5.8.4 | ASSETS INTEGRATIONS | 230 |
| 5.9 | FIELDS SETTINGS | 230 |
| 5.9.1 | DICTIONARIES | 230 |
| 5.9.2 | REGEXES | 235 |
| 5.10 | NOTIFICATIONS | 236 |
| 5.10.1 | TICKETS | 236 |
| 5.10.2 | ASSETS | 244 |
| 5.10.3 | CONTRACTS | 248 |
| 5.11 | AUTOMATION | 250 |
| 5.11.1 | EVENT | 251 |
| 5.11.2 | TIME TRIGGER | 255 |
| 5.12 | EMAIL | 257 |
| 5.12.1 | ACCOUNTS | 257 |
| 5.12.2 | EMAIL FILTERS | 274 |
| 5.12.3 | MESSAGE FILTERS | 275 |
| 5.13 | KNOWLEDGE BASE | 278 |
| 5.13.1 | CATEGORIES | 278 |
| 5.14 | SURVEYS | 280 |
| 5.15 | LOGS | 282 |
| 5.15.1 | MESSAGES | 282 |
| 5.15.2 | LOG MANAGER | 283 |
| 5.15.3 | MONITORING | 286 |
| 5.16 | AUTHENTICATION BACKENDS | 289 |
| 5.16.1 | AZURE AD | 289 |
| 5.17 | NOTICES | 294 |
| 5.18 | FILE REPOSITORY | 296 |
| 5.18.1 | SERVER CONFIGURATION | 297 |
| 5.18.2 | BUCKETS | 298 |
| 5.19 | CUSTOMER PORTAL | 301 |
| 5.19.1 | CONTAINERS | 302 |
| 5.19.2 | CASES | 304 |
| 5.20 | SETTINGS | 306 |
| 5.20.1 | GENERAL | 306 |
| 5.20.2 | API | 319 |

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*](http://mindsd.com) or send us an email to [*info@opgksoftware.com*](mailto:info@opgksoftware.com) thanks!

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

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*](https://www.mintsd.com/pages/contact) or directly by email: [*support@mintsd.com*](mailto: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 found 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:

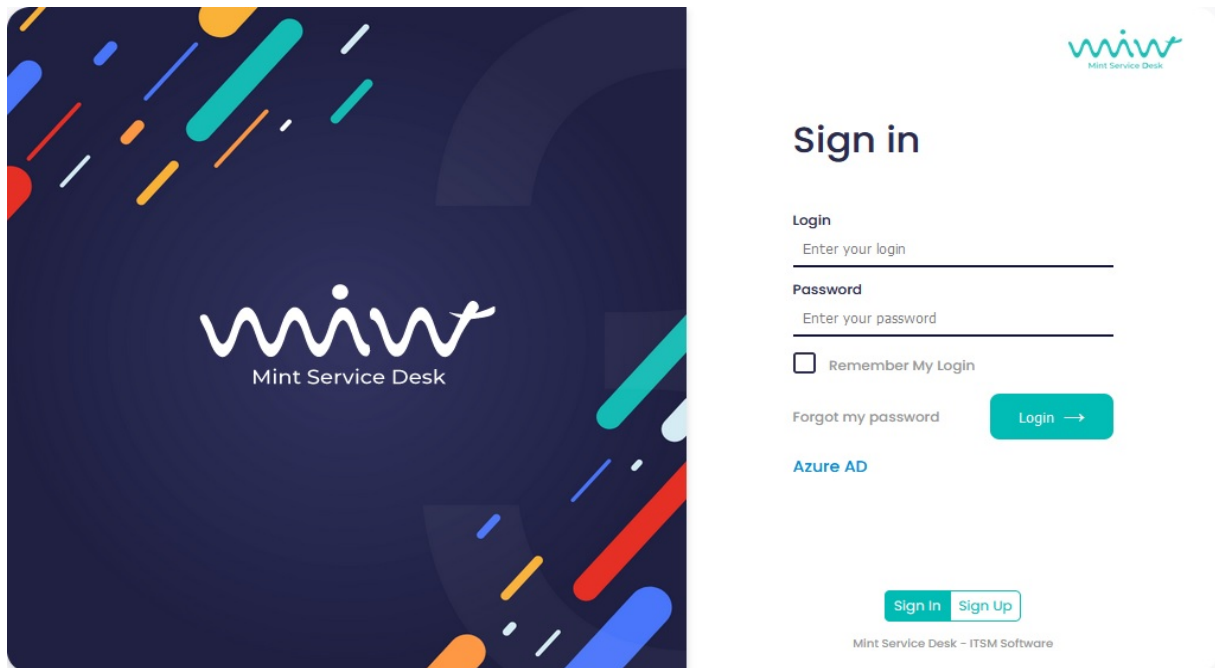
```
$ docker stack rm stack_name
```

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

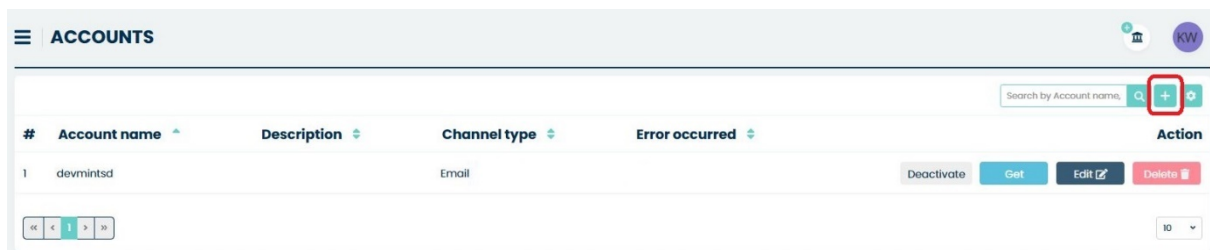
Type your server IP on your web browser and login with the default admin account credentials (remember to change it):

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

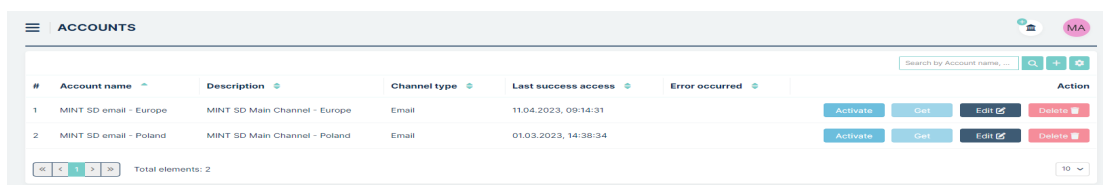


Now, in order to start using Mint Service Desk you need to:

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.

Authorization type* ☒ Credentials ☐ OAuth2 ☐ Anonymous

User name*

Password*

Send server address*

Send server port* Security

Receive protocol* ☐ POP3 ☐ IMAP


Receive server address*

Receive server port* Security

Main address* Additional addresses

* - fields required

Save

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.

TEMPLATE COMPONENTS

Search by Name...

| # | Name | Type | Action |
|----|-----------------------|---------|---|
| 1 | Autoreponse Body | Body | Edit Delete |
| 2 | Best regards - footer | Footer | Edit Delete |
| 3 | Confirm email - body | Body | Edit Delete |
| 4 | New Ticket - body | Body | Edit Delete |
| 5 | New Ticket - footer | Footer | Edit Delete |
| 6 | New Ticket - subject | Subject | Edit Delete |
| 7 | Nowy header | Header | Edit Delete |
| 8 | Reset Password - body | Body | Edit Delete |
| 9 | Thank you - footer | Footer | Edit Delete |
| 10 | Thank you header | Header | Edit Delete |

1 2 3 4 5 6 7 8 9 10

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.

CREATE TEMPLATE COMPONENT

Component name*

Component type* ☒ Email ☐ BODY ☐ FOOTER

Content*

Article

Sender Name

Sender First Name

* - fields required

Save

CREATE TEMPLATE COMPONENT

MA

Component name*

Template component name...

Component type*

SUBJECT

HEADER

BODY

FOOTER

Content*

Font

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Size

▼

Header

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{{EmailUrl}}

⌘

* - fields required

Save

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.

| TEMPLATES | | | |
|-----------|---|--|----------------|
| # | Name | Description | Type |
| 1 | Autoreponse template | | System |
| 2 | bye bye - auto response - ticket closed | bye | System |
| 3 | Confirm email | | System |
| 4 | New Ticket | | System |
| 5 | Newy ticket ! | test | CustomResponse |
| 6 | Reset Password | | System |
| 7 | Thank you - custom response | custom response template for the agent | System |
| 8 | Ticket Changes | | System |
| 9 | autoreponse test | dfghj | System |
| 10 | custom responses for tests | test custom response | CustomResponse |

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.

≡

CREATE TEMPLATE

◀  


| | |
|-----------------|---|
| Header* | Confirm Email |
| Description | Description |
| Select subject | Select subject |
| Select header | Select header |
| Select body* | Confirm email - body |
| Select footer | Select footer |
| Template type * | <input checked="" type="radio"/> System <input type="radio"/> Custom Response |


* - fields required

Save


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.

| # | Login | Email | First name | Last name | Last login | Action |
|---|-------|------------------|------------|-----------|----------------------|--|
| 1 | agent | agent@mintsd.com | Mint | Agent | 27.02.2023, 13:08:57 | Deactivate Role Edit |

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*](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

3.6.2 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 \  
--secret-add source=CertificateKey__key,target=/etc/ssl/private/privkey.key \  
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/](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 best 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";
}

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
```

(continues on next page)

(continued from previous page)

```
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.

WEB INTERFACE


4.1 LOGIN PORTAL

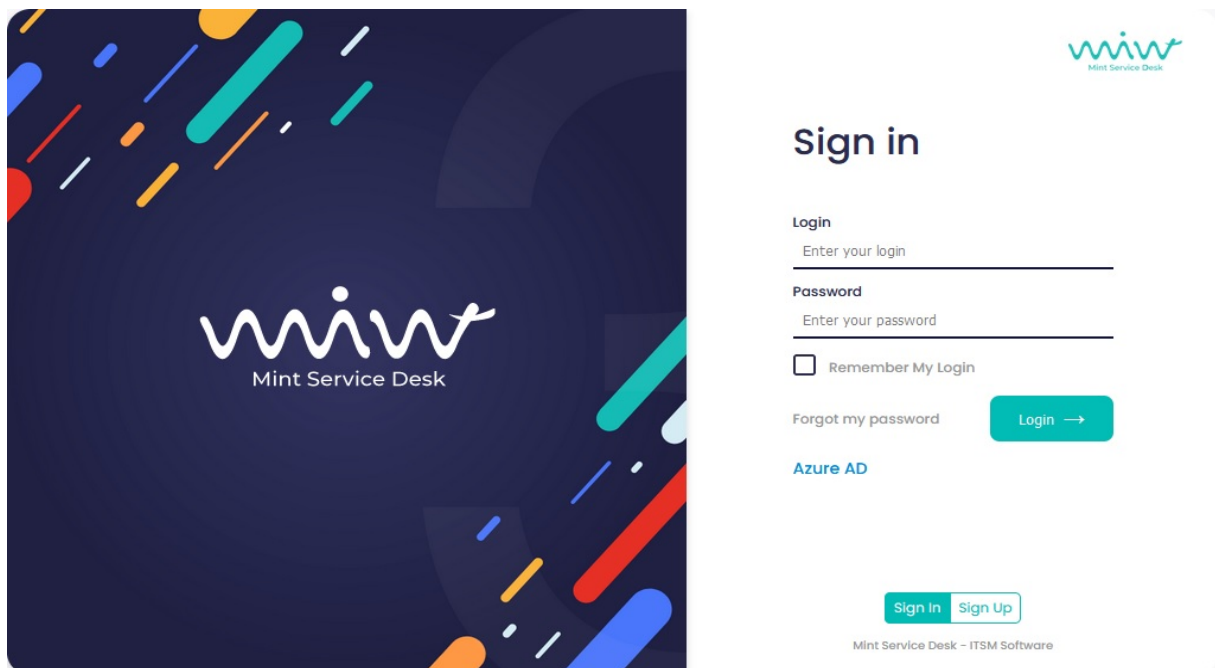
The Mint Web Client URL leads you to the login portal, to ease the user management, all the users can log in in the same page and the system will open the proper session based on the assigned role.

Mint Service Desk works with three different user profiles:

- Customer
- Agent
- Admin

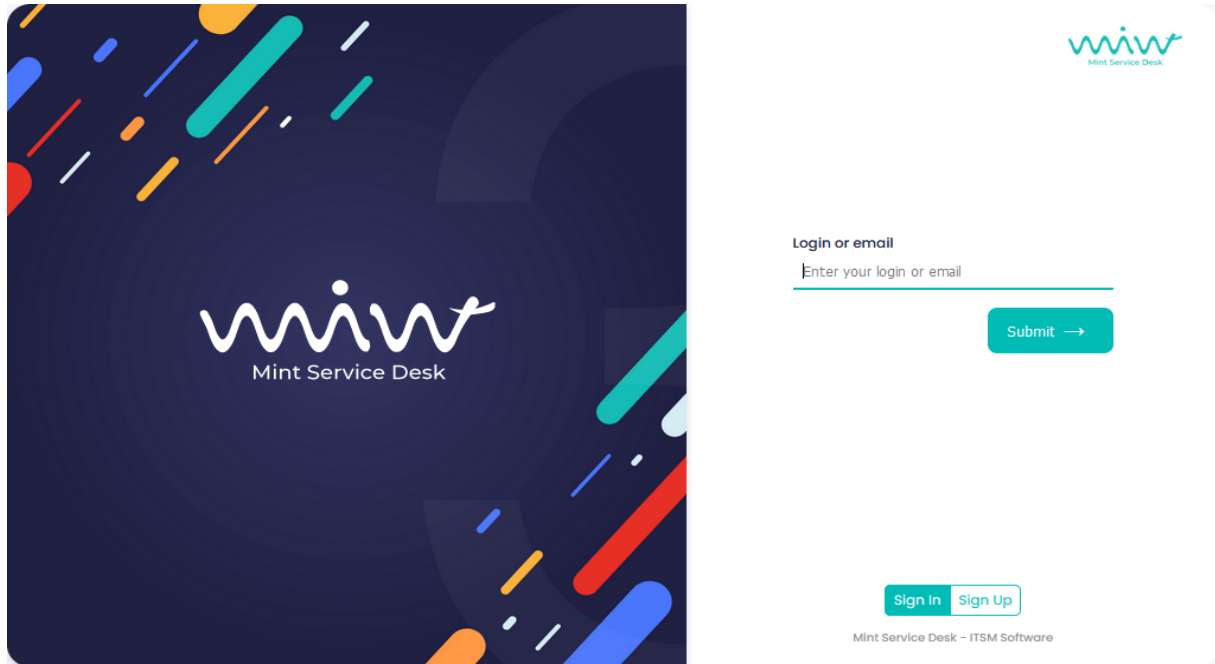
4.1.1 SIGN IN

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”.



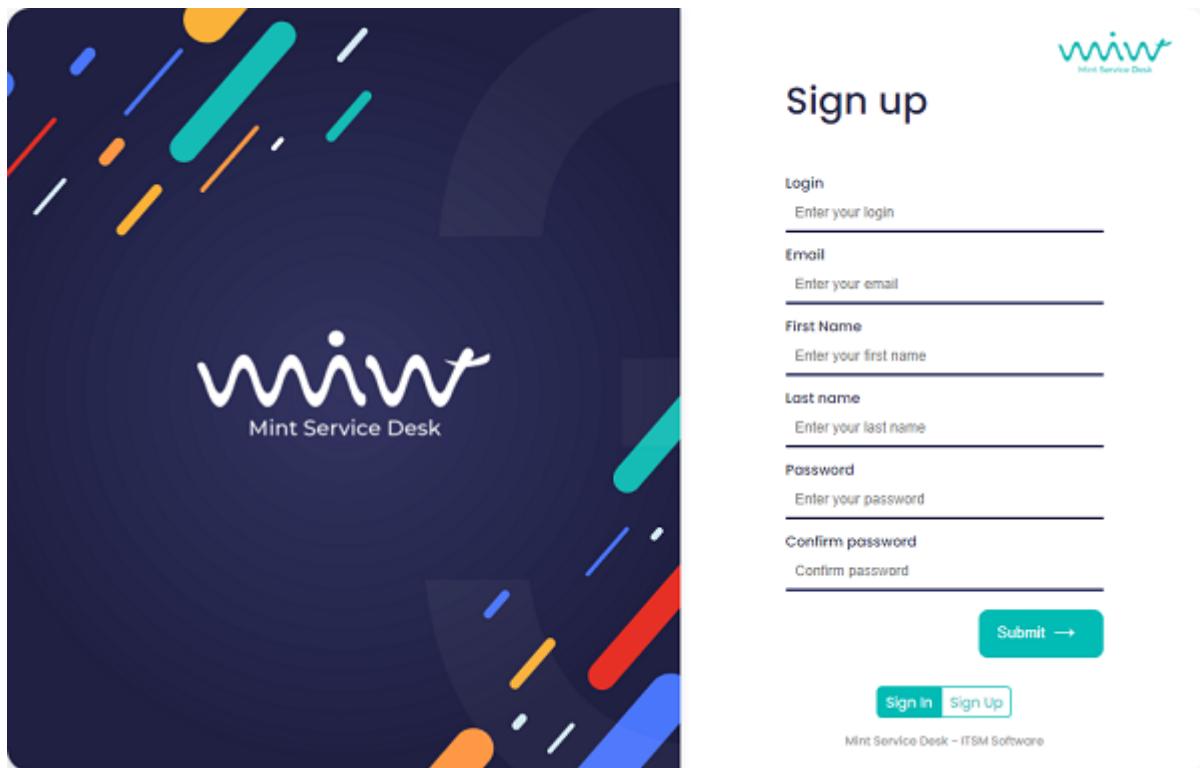
4.1.2 FORGOT MY PASSWORD

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.






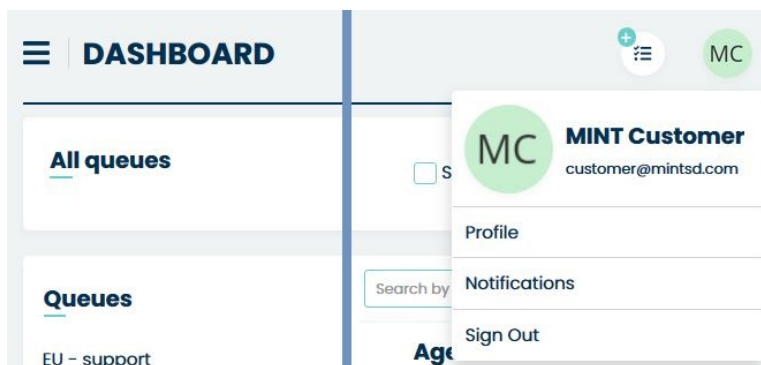
4.1.3 SIGN UP


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 change your personal data, like “Picture” (by clicking on the box), “Language”, “Theme”, “First Name”, “Second Name”, “Surname” and “Password”. Please notice that it is not possible to change the “Email” or “Login”, only the administrator can change the “Email”.

USER PROFILE

Your profile is 80% complete

Basic information

Picture:

Mobile app configuration:

Login: jakub-agent

Email: jakubagent@gmail.com

Personal details

First name: Mint

Second name: Second name...

Surname: Agent

Phone number: Phone number...

Password change

Current password: Password...

New password: Password...

Confirm new password: Confirm password...

User Settings

Language: English (us)

Theme: Default

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 app (if you already downloaded and installed it on your mobile device).

At bottom part of the ‘User profile’ view, below the section ‘User settings’ 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).

User Settings

Language: English (en)

Contact

Skype: New value...

Phone: New value...

Location

Location: Enter localization...

Additional info

Availability: Date from... - Date to...

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.

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 **+**:

The last thing is that you can change the Mint SD color theme. You can choose one of three:

- Default
- Dark
- Grey

To do so go to 'Theme' section and click on 'Choose theme' field. Now, from the dropdown menu select one of the themes (for example 'Dark' one).

Once you save your changes you will immediately see the difference.

USER PROFILE

Two-factor authentication is not configured. To enable it, go to the settings page or press the F11 key.

Your profile is 80% complete 80%

Basic information

Picture:

Mobile app configuration:

Login: admin

Email*: admin@mintsd.com

Personal details

First name*: Mint

Second name:

Last name*: Admin

Phone number:

Password change

Current password: Password...

New password: Password...

Confirm new password: Confirm password...

Save




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

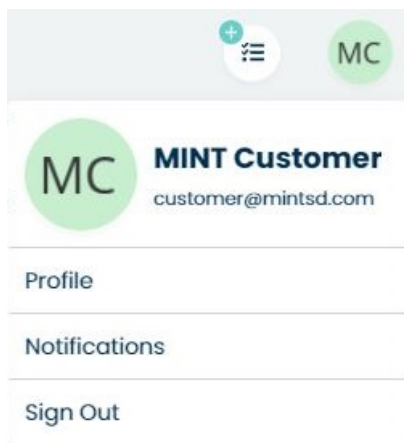
Below 'Profile' button you will find another position: 'Notifications'. Right here you the notifications which were allowed for you to receive (admin user can change that). If you don't want to receive any of them simply unmark the correct position.

Entry notifications

| Notification |  System |  Email |  Push |
|------------------------|--|---|--|
| New Article | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| New Comment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| New Ticket | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Pending Reminder | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| SLA Expiration | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| SLA Notification | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <div>Cancel Save</div> | | | |

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

This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

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.

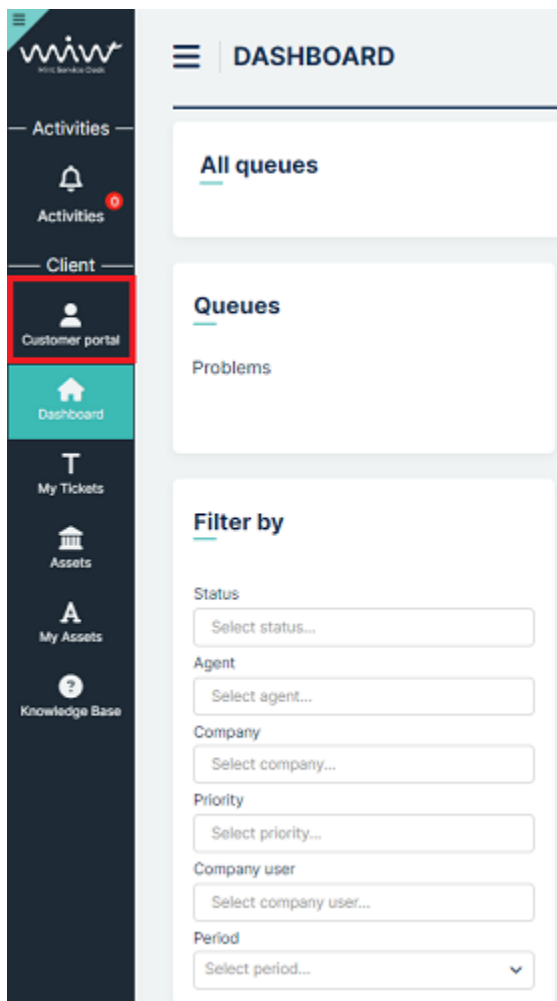
The module consists of:

Cases: These are templates created by the Administrator.

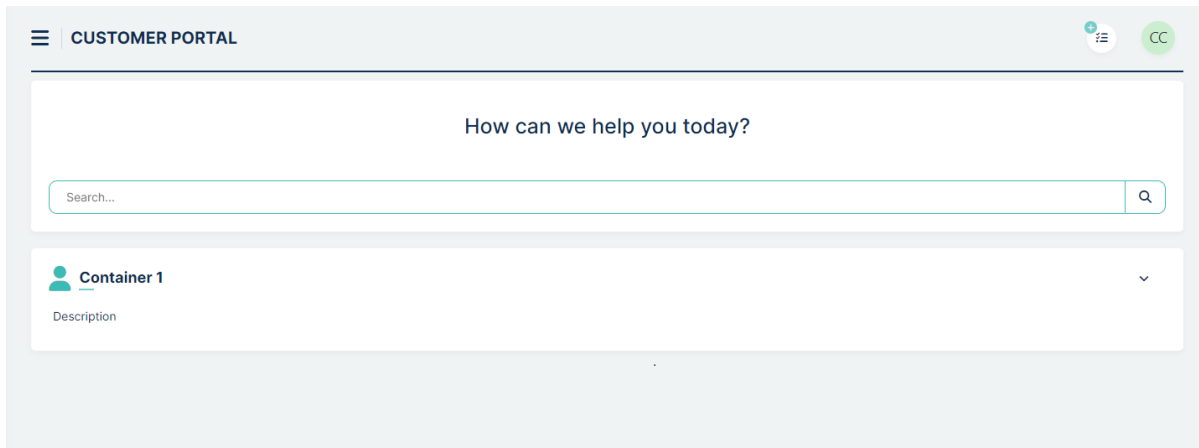
Containers: Here, you can assign and group the cases mentioned above.

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:

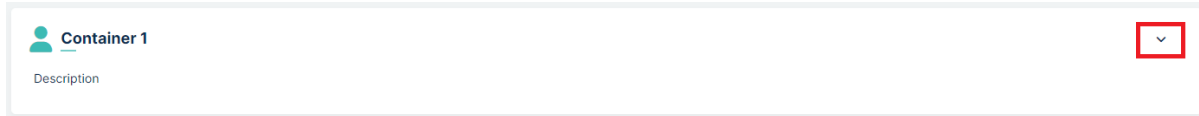
Container name

Container description

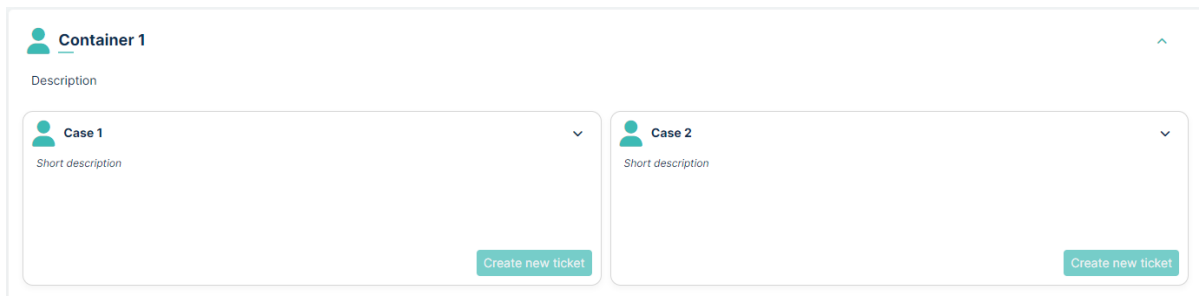
Case name

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.

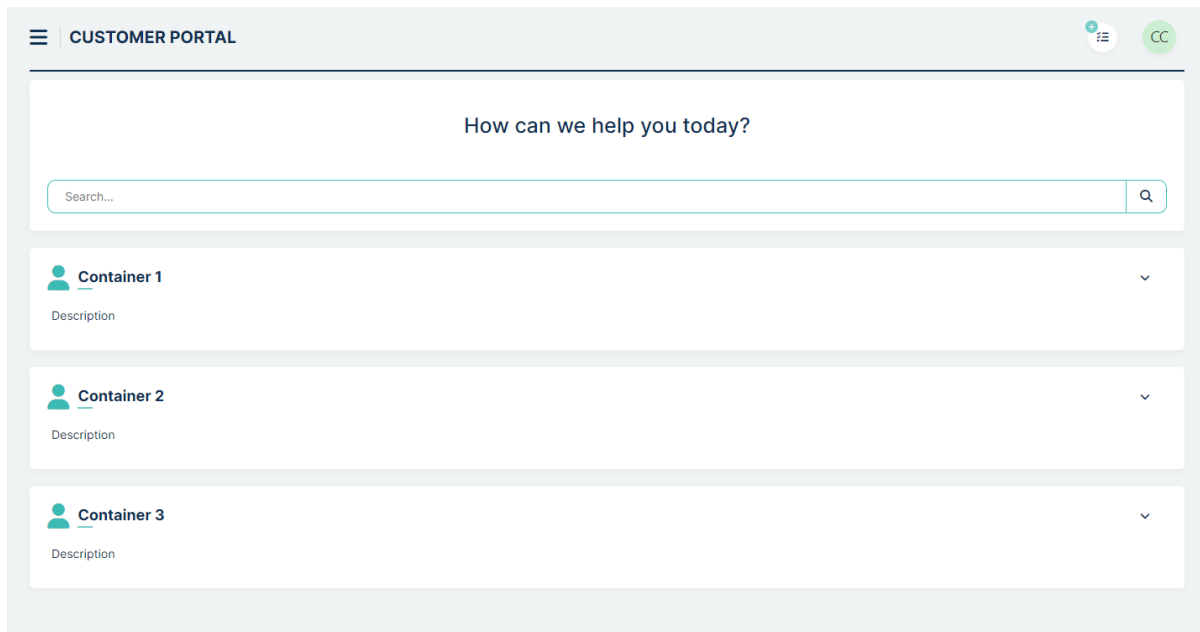


Clicking on this button reveals the case name, a brief case description, and the associated picture or photo assigned to the case

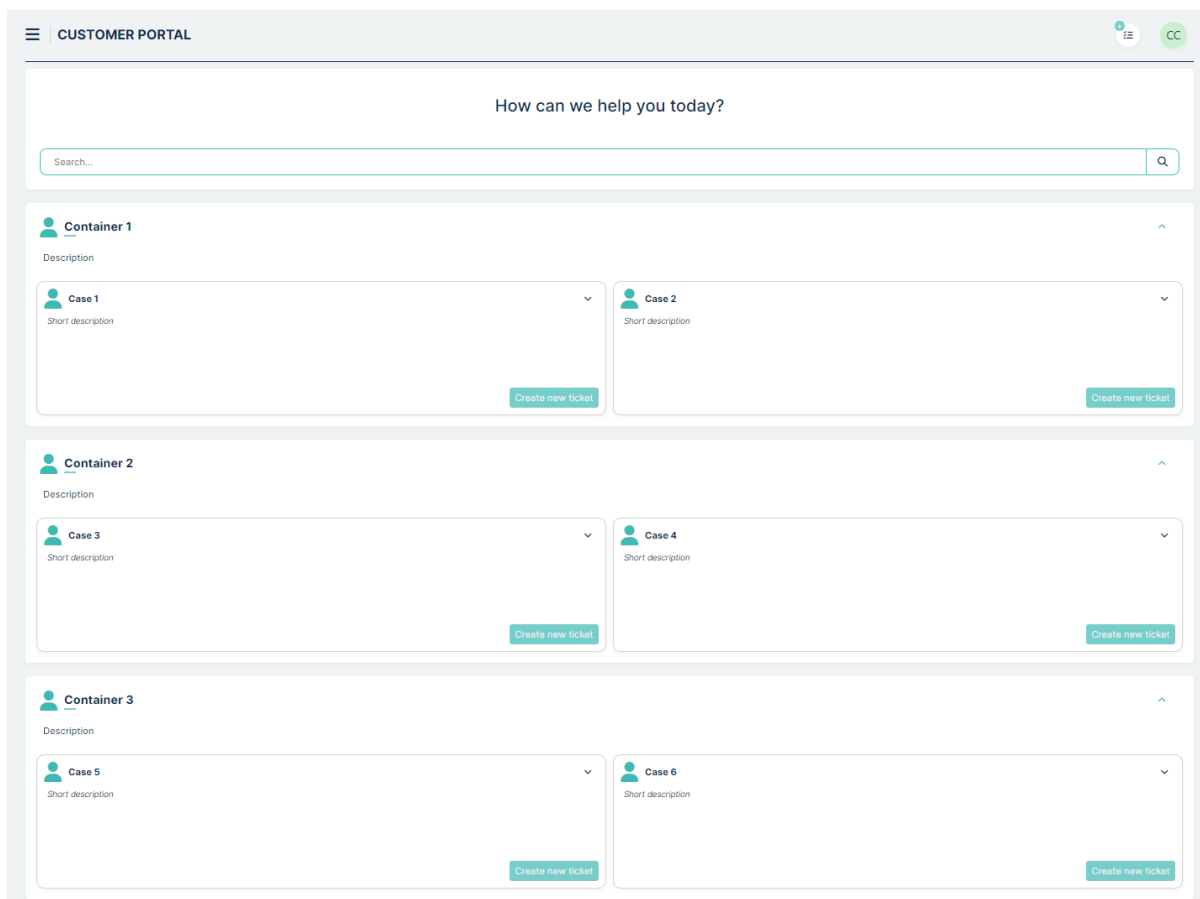


At the bottom right of the case, you'll find the **Create new ticket** button and the expand list button. Clicking the expand list button reveals the long case description text.

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

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.

TICKET DETAILS

Case 1

Today

customer@mintsd.com (Customer Customer) | 12.09.2023, 10:03:25 | New

Short description

Company user

CC

Customer Portal

Enter a message...

Preview Reply

Case 1

Short description

Details

Ticket number:

MT#202309120000000004

Company user:

Customer Customer
customer@mintsd.com

Company:

Mint Service Desk

Phone number:

No value

Ticket relation type:

Ticket relation type...

Status:

Open

Queue:

Problems

Assets:

Search

Ticket type:

Hardware problems

Service:

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

TICKET DETAILS

Thank you, your ticket has been created. Our agents will take care of your case

Back


4.3.2 DASHBOARD

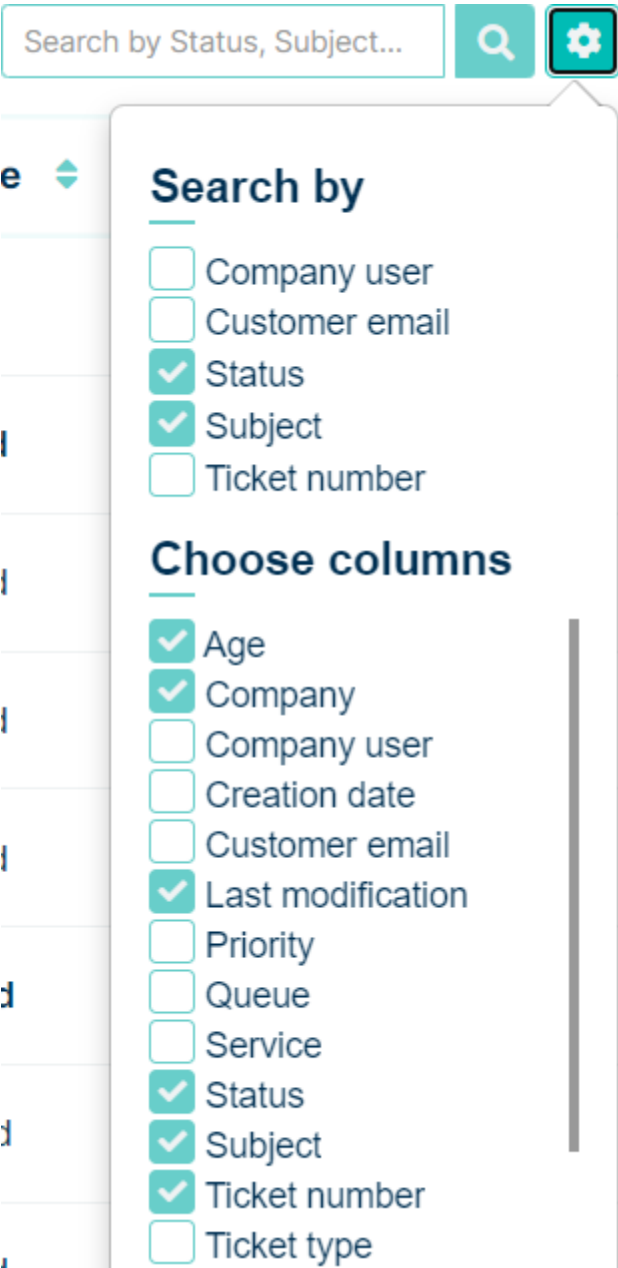
The first view after login is called “Dashboard”. It displays the tickets that the client is able to see, those can be “My tickets” or tickets from the same company created by another colleague.

The screenshot shows the 'DASHBOARD' interface. On the left, there are sections for 'All queues' (listing 'EU - support' and 'Poland - support'), 'Filter by' (with dropdowns for Status, Agent, Company, Priority, Company user, and Period), and 'Ticket types' (listing 'Malfunction' and 'Problem'). The main area displays a table of tickets. The table has columns: Ticket number, Subject, Last modification, Company, Age, and Status. A search bar is at the top right of the table area. Below the table, there are pagination controls showing 'Total elements: 1' and a dropdown for '10' items per page.

| Ticket number | Subject | Last modification | Company | Age | Status |
|------------------------|--|----------------------|-------------------|-----|--------|
| MT#2023032800000007... | My PC is turning off after couple of minutes | 28.03.2023, 11:16:11 | Mint Service Desk | <1h | Open |

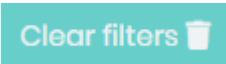
You can filter the tickets listed by ‘Queues’, ‘Ticket type’, ‘Status’ and ‘Period’, or choose to sort tickets by different attributes like “Ticket Number”, “Subject”, “Creation date” and more. To do so just click on the column name. You will notice that each time you do that a small icon next to the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



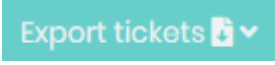
Also, you can look for specific tickets using the section “Search” field. Whatever you type here will be searched for, depending on the things you marked in the ‘Search by’ section of the ‘Set column properties’ window.



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'.

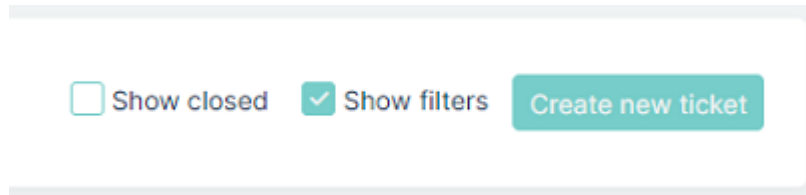
If you like to see or hide tickets that have already been solved and closed, you can always mark/unmark the option

☐ Show closed

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

☒ Show filters

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.




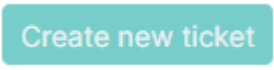
On the left side, you have the navigation buttons, while on the right side you can change the number of tickets per page (5/10/15/20/25/50 or even 100, by default you will have 10 Tickets per page). Those options are available in many places in Mint Service Desk.

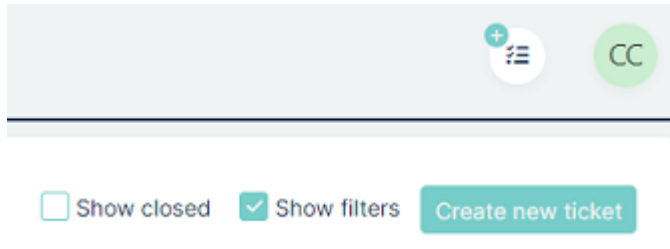
One more important thing is that you can click on any attribute of the listed tickets on your dashboard and that will take you to the "Ticket Details" of the selected ticket.

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.

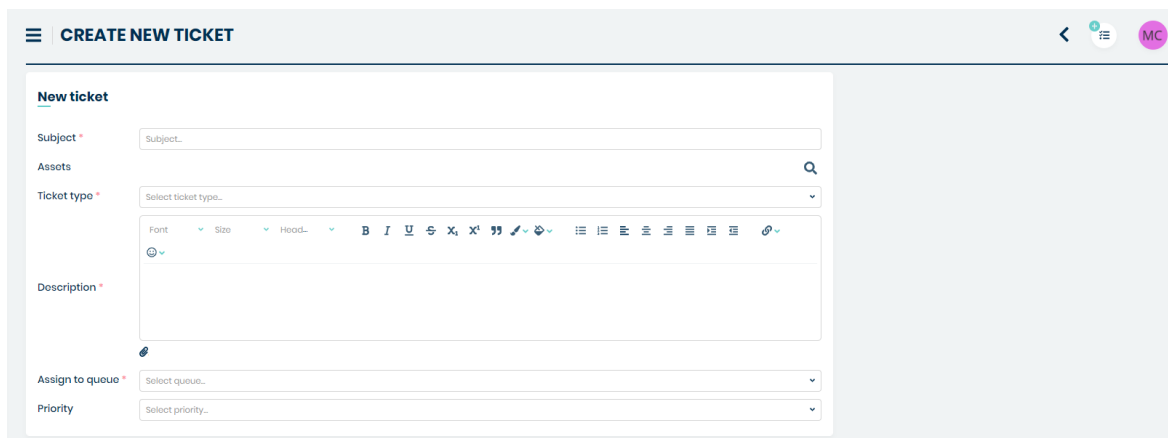
Your access rights has been changed. You are not authorized to view this page.

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.

Assets Show filters

Categories

- Hardware - PC/laptops
- Hardware - phones
- Other
- Software - OS
- Software - other

Filter by

Period
Select period...

Clear filters Export assets

Search by Description, Na...

| Id | Name | Description | Creation date |
|----|-------------------------------|------------------------------------|----------------------|
| 10 | Win 10, x64, OEM | | 29.03.2023, 14:36:27 |
| 9 | DELL Laptop for IT (room 328) | New laptop for IT room 328 (IT) | 29.03.2023, 14:36:02 |
| 8 | 3DS Max 10 | Graphical software for clients | 29.03.2023, 14:35:14 |
| 7 | MS Windows 10 | | 29.03.2023, 14:34:50 |
| 6 | Dell latitude | New laptop for IT Department | 29.03.2023, 14:34:29 |
| 5 | iPhone 15 | New iPhone phone for IT Department | 29.03.2023, 14:33:25 |

« < 1 > » Total elements: 6 10

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.

Ticket type * Malfunction

Details

Description

Place of the incident

Contact number

Impact level

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.

Knowledge Base

PC/Laptop - temperatures

Hardware related :: PC/laptop problems, 29.12.2020, 15:16:22

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

Title

PC/Laptop - temperatures

Matched questions

My PC is turning off after a couple of minutes.

My laptop is turning off each time after couple of minutes.

The fans in my PC are woking very fast and very loud.

The fans in my laptop are woking very fast and very loud.

Answer

The problem might be caused by high temperatures on your:

- CPU - PC/Laptop turning off
- GPU - some graphical artifacts/problems with display

After you turn on your PC/Laptop go to your BIOS (see the manual for your motherboard/PC/Latop) and check the temperatures.

If they are OK then allow the system to be loaded and then check the temperatures with some free software.

If they are too high please contact us for further help.

Close

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

CREATE NEW TICKET

New ticket ✕ Discard draft

Subject *

Assets

Ticket type *

Service

Description *

Font Size Head... B I U X₁ X₂

Hallo,

Starting from yesterday my PC is turning off after a couple of minutes from the moment I turn it on. Before that happens I can hear that fans inside the case are working very loud. Then I have an error (blue screen).

I would be very grateful for any help.

Best regards,

Kamil

Assign to queue *

Priority

Details

Description

Place of the incident

Contact number

Impact level

Knowledge Base

PC/Laptop - temperatures

Hardware related : PC/laptop problems, 2012/2020, 10/4/34

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.

New ticket

X Discard draft

Subject *

My PC is turning off after couple of minutes

Assots

Ticket type *

Malfunction

Service

EU Support - problems/malfunctions

Description *

Font Size Head... B I U S X^o Xⁱ ” “ ↶ ↷ 🔍 🔄

😊 ▼

Hello,

Starting from yesterday my PC is turning off after a couple of minutes from the moment I turn it on. Before that happens I can hear that fans inside the case are working very loud. Then I have an error (blue screen).

I would be very grateful for any help.

Best regards,

Kamil

Assign to queue *

EU - support

Priority

Select priority..

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..

Preview

Fold

Hello,

Starting from yesterday my PC is turning off after a couple of minutes from the moment I turn it on. Before that happens I can hear that fans inside the case are working very loud. Then I have an error (blue screen).

I would be very grateful for any help.

Best regards,

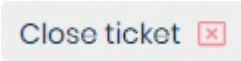
Kamil

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

TICKET DETAILS

History: Hardware issue

Search history:

Search history

| User | Modification date | Property | Old value | New value |
|------------|----------------------|--------------|------------|-------------------|
| Mint Agent | 04.07.2023, 12:39:03 | Company user | Mint Agent | Customer Customer |
| Mint Agent | 04.07.2023, 12:39:03 | Company | | Mint Service Desk |

Email

Customer Portal

Internal note

Enter a message...

Preview

Reply

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.

Categories

Hardware - PC/laptops

Hardware - phones

Other

Software - OS

Software - other

Search by Name, Description

| <input type="checkbox"/> | Id | Name | Description | Creation date |
|--------------------------|----|-------------------------------|---------------------------------------|----------------------|
| <input type="checkbox"/> | 6 | Win 10, x64, OEM | | 11.09.2020, 12:03:16 |
| <input type="checkbox"/> | 5 | DELL laptop for IT (room 328) | New laptop for room 328 (IT) | 07.09.2020, 11:15:50 |
| <input type="checkbox"/> | 4 | 3DS Max 10 | Graphical software for clients. | 04.09.2020, 11:30:13 |
| <input type="checkbox"/> | 3 | MS Windows 10 | | 04.09.2020, 11:20:43 |
| <input type="checkbox"/> | 2 | Dell latitude | New laptop for IT department. | 04.09.2020, 11:18:07 |
| <input type="checkbox"/> | 1 | iPhone 15 | New iPhone phone for IT Department... | 04.09.2020, 11:04:26 |

10

Cancel

Save

Ticket number: MT#202009220000000001

Company user: MINT Customer customer@mintsd.com

Company: Mint Service Desk

Status: In progress

Queue: EU - support

Assets

Ticket type: Problem

Priority: Critical

Service: EU Support - problems/mailfunctions

Age: <1h

Description: PC malfunction.

Place of the incident: Berlin, Germany

Contact number: +49 3335555555

Search


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

Assets:

DELL laptop for...

Dell latitude

Search

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).

Dell latitude



Asset details

| | |
|-------------|-------------------------------|
| Description | New laptop for IT department. |
| Categories | Hardware - PC/laptops |
| Attachments | |

PC / laptops

Type

Laptop

CPU producer

AMD

CPU model

AMD Ryzen 5

GPU producer

NVIDIA

GPU model

GTX 1660Ti

Memory

16 GB

Video memory

6 GB

HDD type

SSD M.2

HH size

1 TB

Close

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.

Details

Description

PC malfunction.

Place of the incident

Berlin, Niemcy

Enter localization...

Contact number



+49 3335555555

New value...

Impact level

Critical

x v

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  .

TICKET DETAILS

My PC is turning off after couple minutes

Today

Sent

Hallo,

Starting from yesterday my PC is truning off after a couple of minutes from the momen I turn it on. Before that happens I can henr that fans inside the case are working very bud. Then I have an error (blue screen).

I would be very grateful for any help.

Best regards,

Kamil

Company user

JC

Sent

Hi MintSD,

Thank you for creating a Ticket. We will start working on it as soon as possible.

Best regards,

MINT Service Desk

JA

Agent

Show less


^

Customer Portal

Enter a message...

Preview

Reply

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).

42

Chapter 4. WEB INTERFACE

TICKET DETAILS

My PC is turning off after couple of minutes.

| | | | | | | |
|----|----------------------------------|----------------|---|----------------------|--------|--|
| MA | Company user MintSD Assistant | Autoresponse | Hi MintSD, | 22.09.2020, 11:18:46 | Sent ✓ | |
| MC | Company user MINT Customer | Ticket created | Hello, Starting from yesterday my PC is truning off after a couple of minutes from the momen I turn it on. Before that happens I can hear that fans inside the case are working very loud. Then I have an error | 22.09.2020, 11:18:35 | Sent ✓ | |

Sent ✓ MINT Customer | 22.09.2020, 11:18:35

Hello,
Starting from yesterday my PC is truning off after a couple of minutes from the momen I turn it on. Before that happens I can hear that fans inside the case are working very loud. Then I have an error (blue screen).
I would be very grateful for any help.
Best regards,
Kamil

Internal channel

Enter a message...

Add attachment

Reply ↗

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 [See previous activities →](#) button.

Notifications

New Article ✓
MintSD Assistant created new article
22.09.2020, 11:19:15

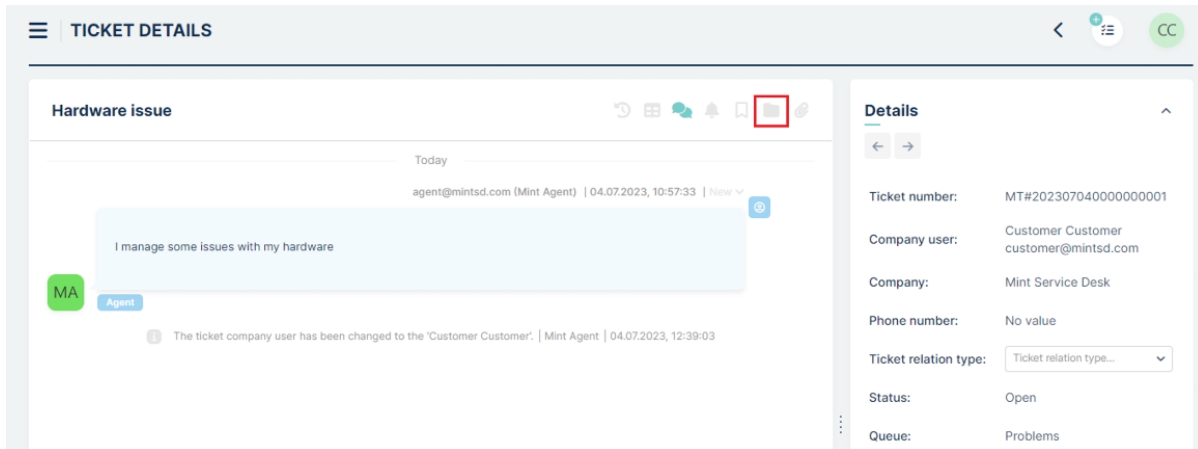
[See previous activities →](#)

The second one (🔖), once activated will send you notifications each time something new happens within the ticket. Next button is the **File Repository**

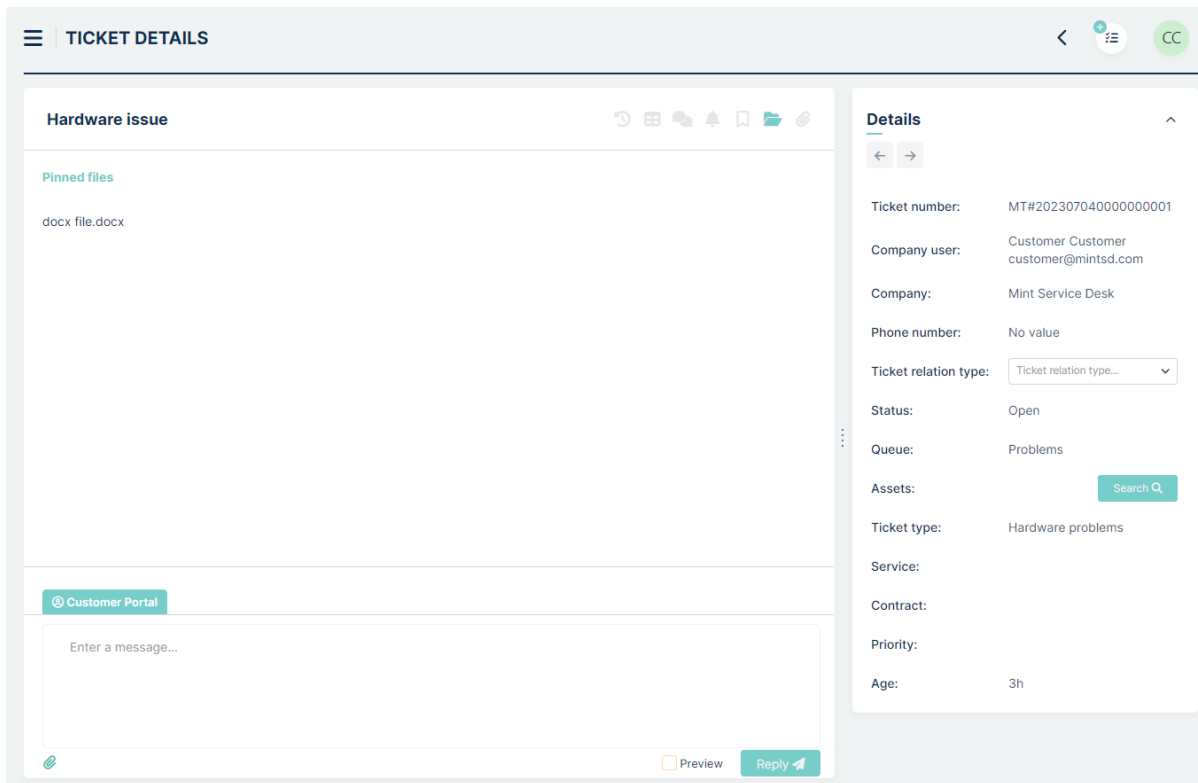


File Repository is a place for the orderly storage of “MINT” application documents. Each user level has different options for dealing with files from the repository. The customer can download files if they are assigned to a given ticket.

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

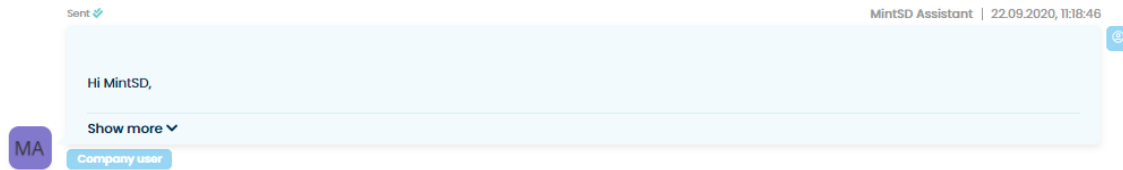


We can click on it and enter to File Repository tab. Here we can see files pinned by Agent.



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.

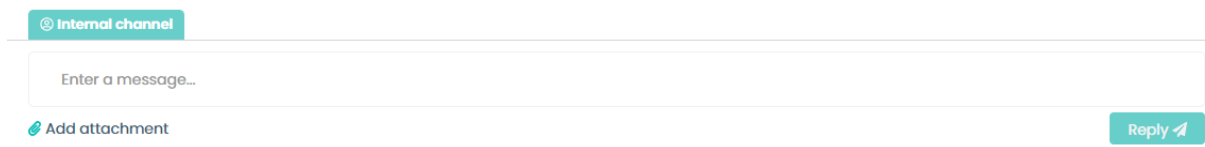
Let’s take a look to chat section. If the message inside the chat contains a lot of text it will be shortened – in order to see the whole text you need to click [Show more](#).




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.

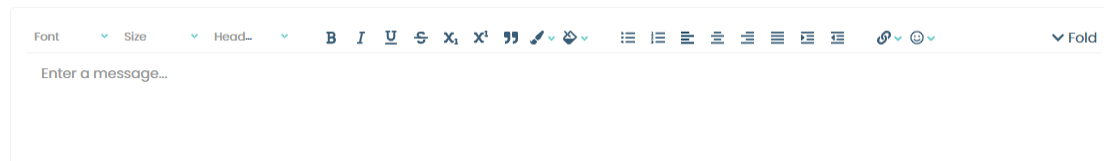
- i The ticket priority has been changed to the 'High'. | Mint Agent | 22.09.2020, 11:26:37
- i The ticket priority has been changed to the 'Critical'. | Mint Agent | 22.09.2020, 11:26:45
- i Ticket type has been changed to 'Problem' | Mint Agent | 22.09.2020, 11:26:52


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

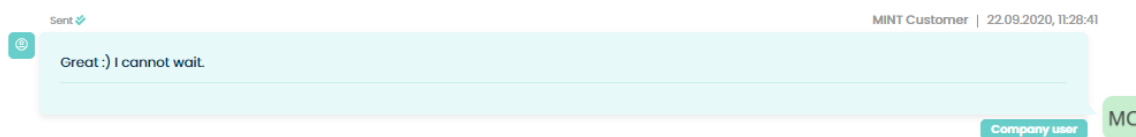


Type the message, add some attachments ('Add attachment') if you want, and click  button.

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.



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.

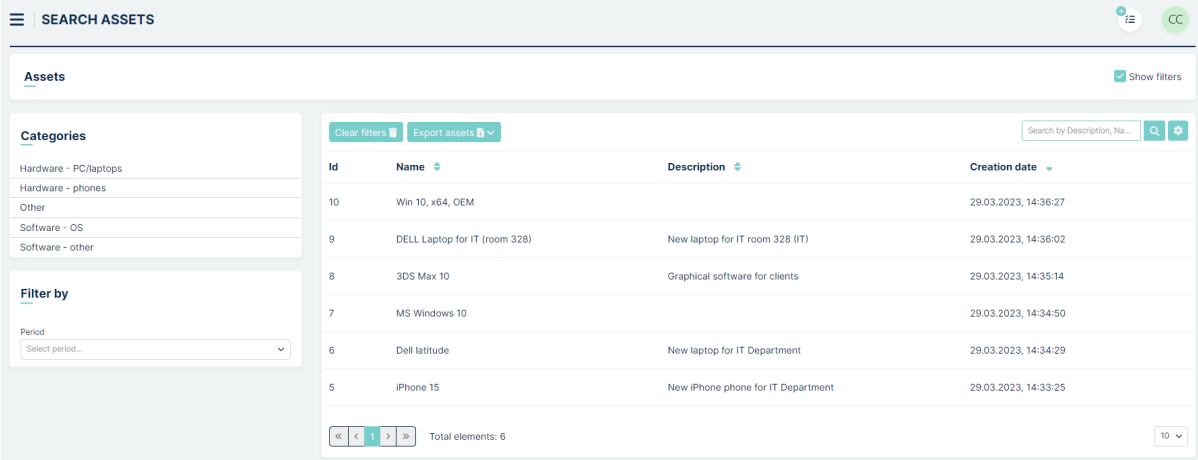
The “My Tickets” view consists of a panel containing tables with requests, a side panel containing basic filters, and a top panel containing “Show Closed” and “Show Filters” checkboxes. The table has basic columns with information such as status, queue, agent, for example.

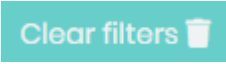


Navigating “My Tickets” is the same as the dashboard and is described in the “Dashboard” section

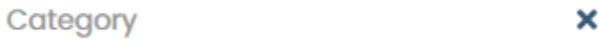
4.3.6 ASSETS


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.

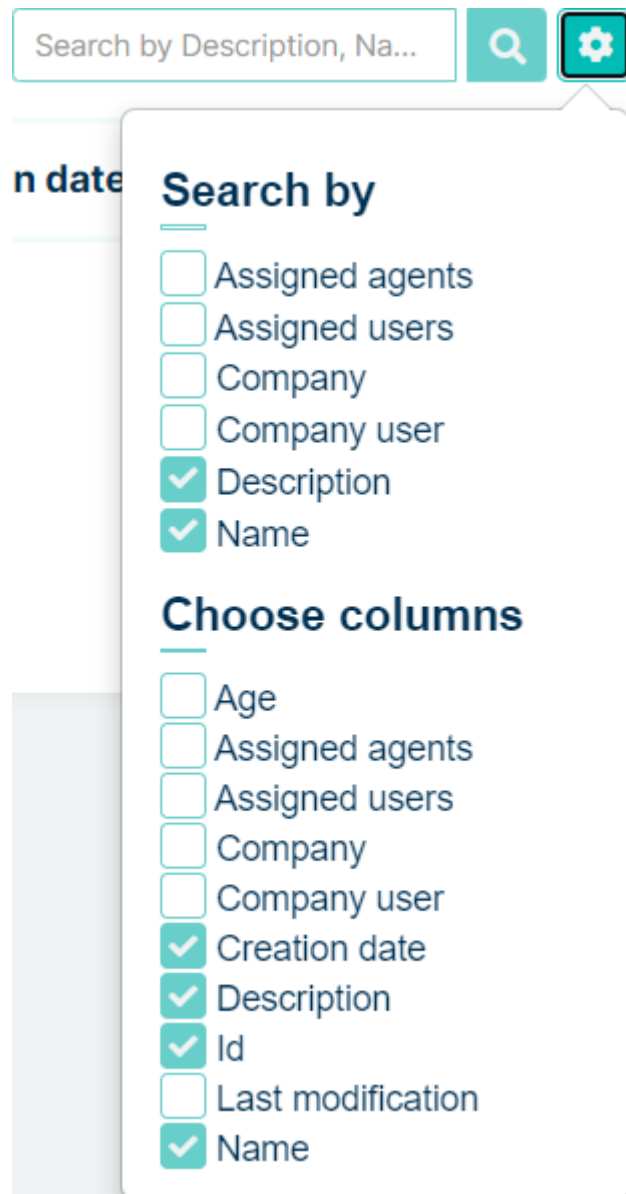
As an example, it is very helpful for software assets because you will know if your company already has a particular software or license you may need, and you don’t need to pay twice.



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

| | | | |
|-----|-----------|--|----------------------|
| 103 | iPhone 15 | New iPhone for IT Departament members. | 29.12.2020, 14:37:07 |
|-----|-----------|--|----------------------|

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.

ASSET DETAILS

Buttons: Show related tickets, Create related ticket, Generate pdf, Print QR, Asset history

Resources

Asset label

Basic information

Name: DELL laptop
Description: New laptops for IT and client.
Categories: Hardware - PC/laptops

PC / laptops

Type: Laptop
CPU producer: AMD
CPU model: Ryzen 5 3600
GPU producer: NVIDIA
GPU model: GTX 2080
Memory: 16 GB
Video memory: 12 GB
HDD type: SSD M.2
HDD size: 1 TB

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 **Show related tickets** button.

ASSET DETAILS

Buttons: Show related tickets, Create related ticket, Generate pdf, Print QR

Resources

Attachments, Asset label

Basic information

Name, Assots

User tickets

All queues

Queues

Ticket queue

Ticket types

asd, TicketType02

Search by Subject, Status...

| Ticket number | Subject ... | Last mo... | Compa... | Age | Status |
|------------------|-------------|-------------------|----------|-----|--------|
| DEV#202103110045 | dfsdfe | 11.03.2021, 09... | Company | 5d | Open |

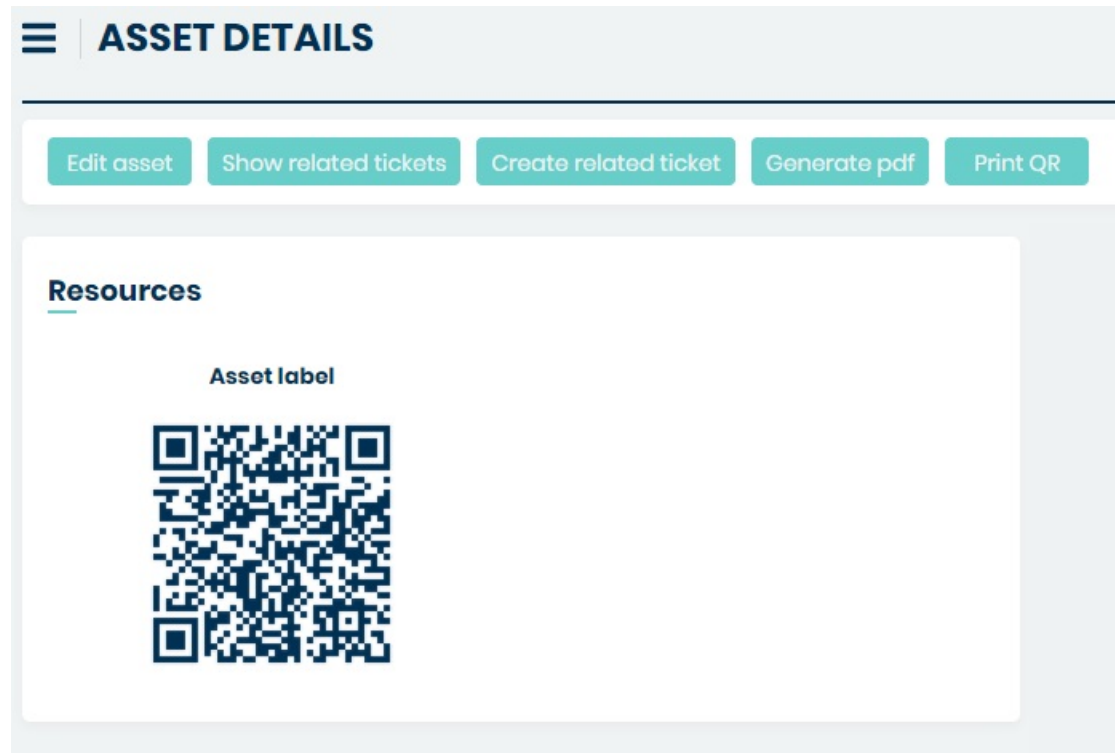
Total elements: 1

Close

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.

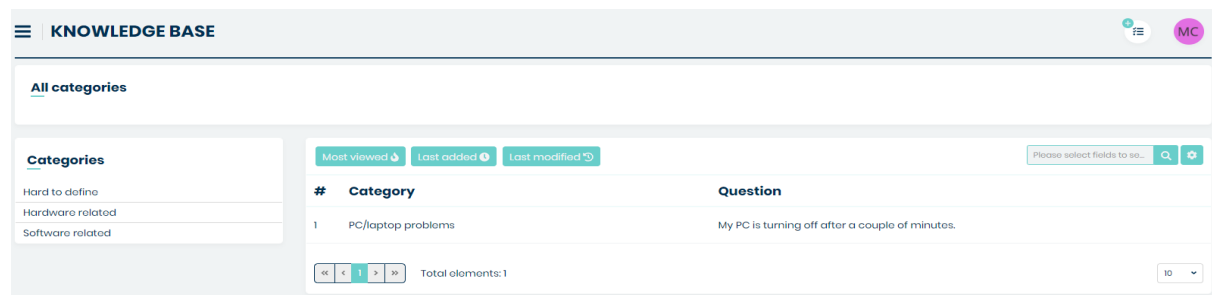


4.3.7 MY ASSETS

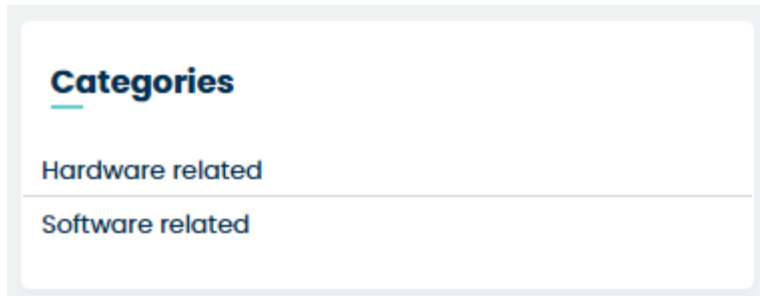
The only difference between this part and ‘Assets’ is that here you will only see the Assets that are only assigned to you. The rest (asset list, editing, preview, etc.) stays the same as it was for ‘Assets’.

4.3.8 KNOWLEDGE BASE

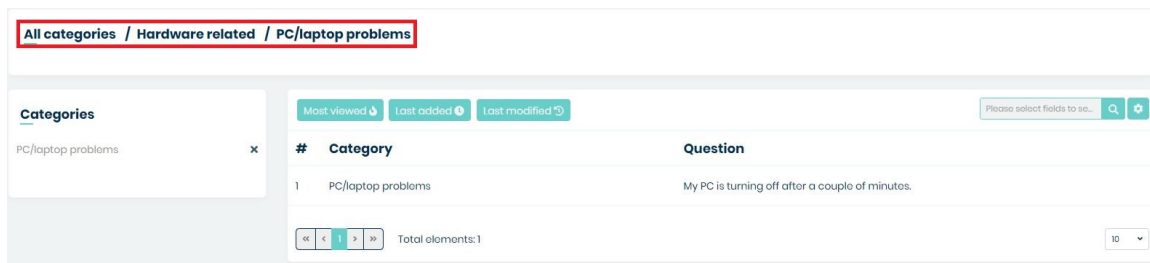
In this section, as a Client you can see the whole list of Knowledge Base topics with questions assigned to them and their answers. You can browse the list of already existing topics and search for the answers that might help you with your problem. Also, as it was described in ‘Ticket details’ part,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



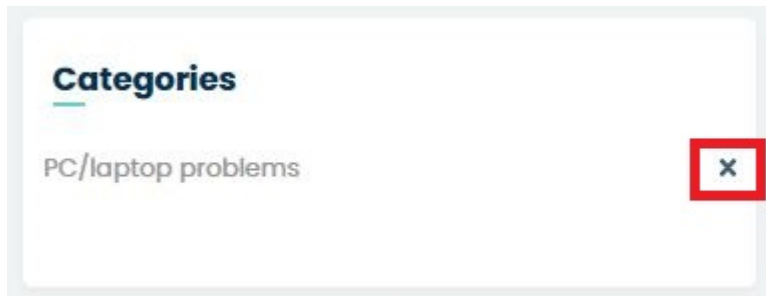
The default view shows the list of all available topics. On the left side, you can see available categories.




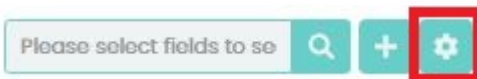
You can select one category, or even a sub-category inside to find the topic that fits your need. If you do so you can easily go back to any level above in the category structure by clicking on the category path in the upper side of the view.



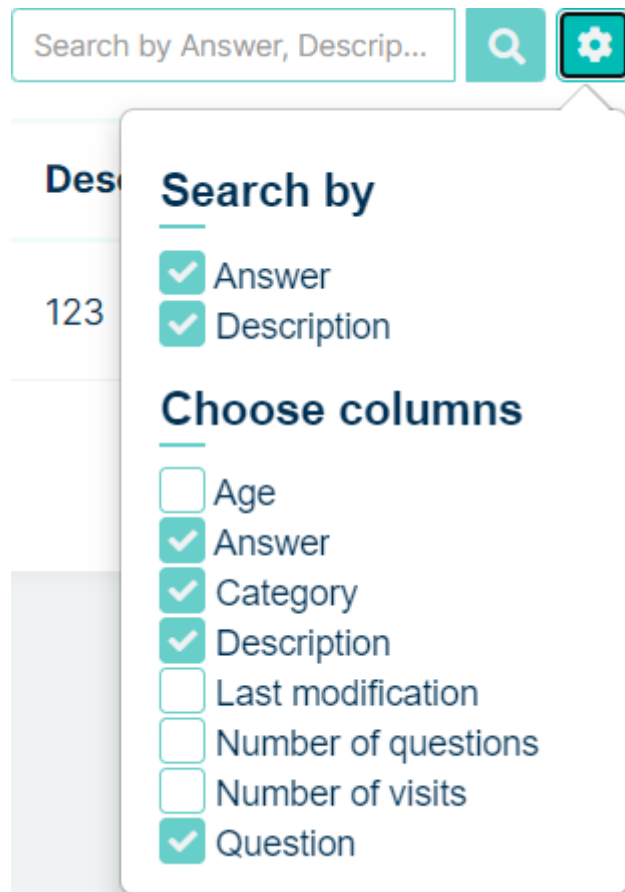
You can also click on the 'X' button located on the right side of the currently selected category/sub-category.



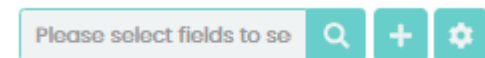
By default, in the main view of the Knowledge Base section, you will see the list topics with the following attribute columns: Category, Question, Action. In order to see more information, you need to click the  button.



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.

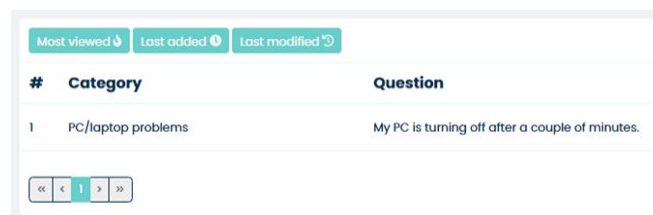


Also, you can look for a specific topic by using the section “Search” field. Whatever you type here will be searched for, depending on the things you marked in the ‘Search by’ section of the ‘Set column properties’ window.



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

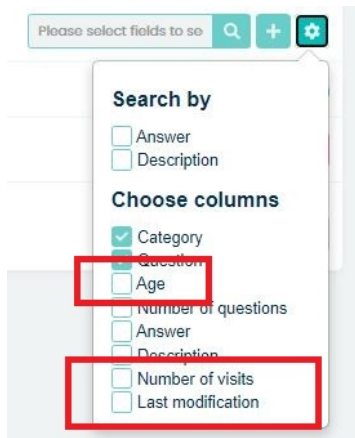
- ‘Most viewed’
- ‘Last added’
- ‘Last modified’



They are used for sorting the list by:

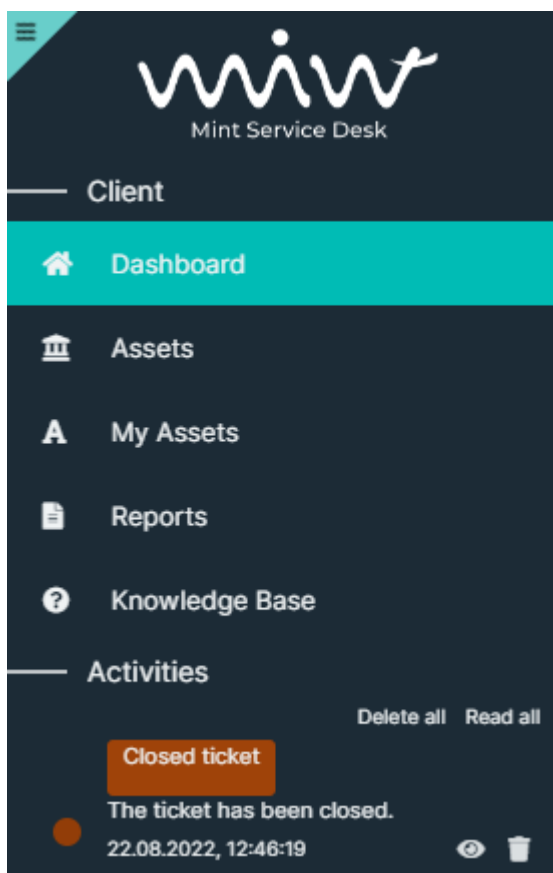
- **Most viewed** - from most viewed to the least viewed (column ‘Number of visits’)
- **Last added** – from most recently added topic to the oldest one (column ‘Age’)
- **Last modified** – from the most recently modified = most up to date (column ‘Last modification’)

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.



4.3.9 ACTIVITIES

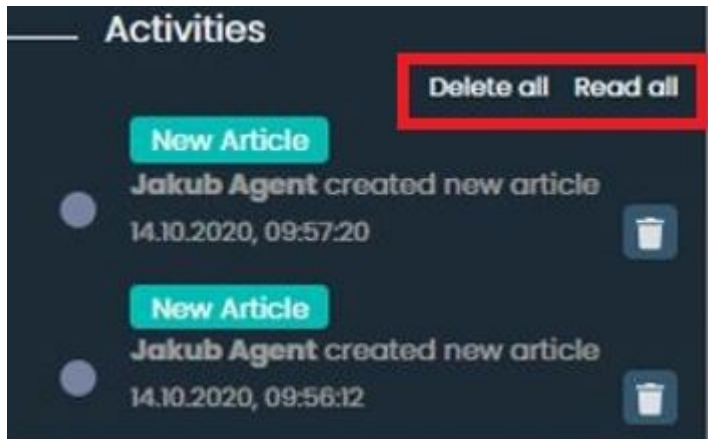
On the left side, in the lower part of the menu, you will find the Activities section.



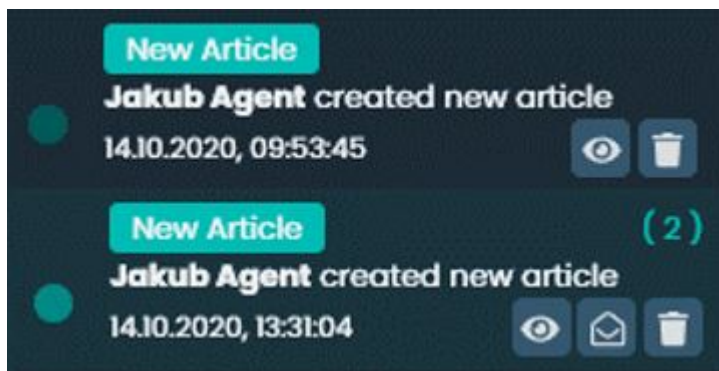
It will display the tickets with any new activity, so you could easily see what is new and go directly to the action. You will see a blinking position on the list each time a new change, like a new message (Article) from the Agent, has been made. The notifications are customizable (color, title, content,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



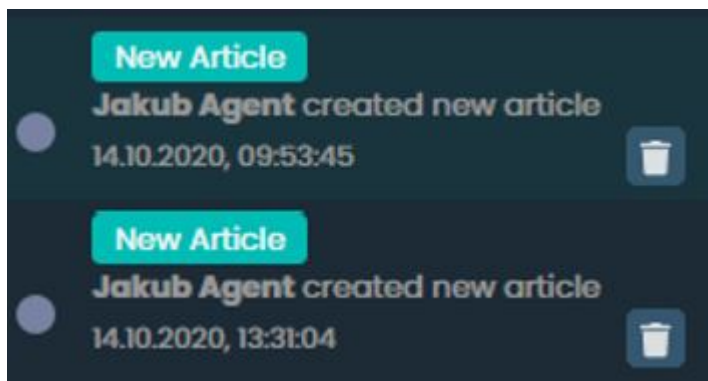
Also if you have a couple of unchecked notifications within one ticket, for example, a couple of unread messages from the Agent, you will notice a number presented on the right side inside the notification.



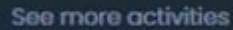
Now you can click on the notification and be moved to the Ticket Details screen where you can check the messages you missed.

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.



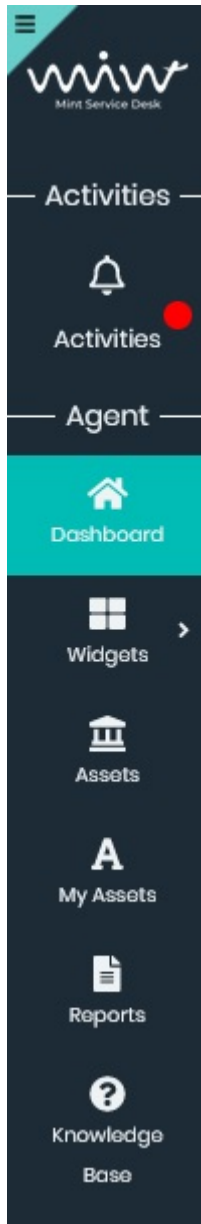
If you have plenty of positions available on the Activities list, you will see only part of them. To see more click on the button 'See more activities' and more of them will be loaded.

A rectangular button with a dark blue background and the text "See more activities" in a light blue, sans-serif font.

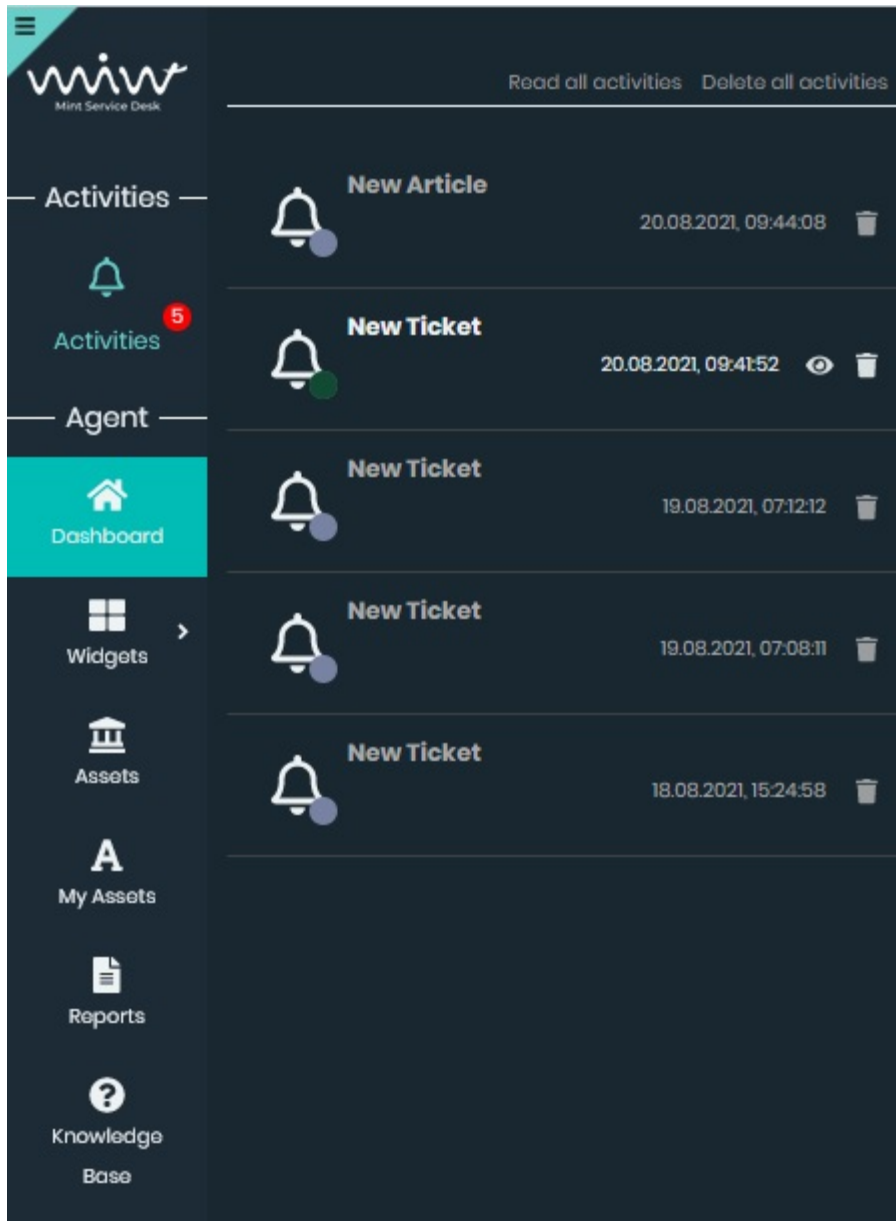
Each time you click on the notification in the 'Activities' section you will be moved to the Ticket Details screen where you can continue communicating with an Agent.



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 not 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.

The screenshot shows the 'DASHBOARD' view of the Agent Portal. It features a sidebar on the left with sections for 'Queues' (EU - support, Poland - support), 'Filter by' (Status, Agent, Company, Priority, Company user, Period), and 'Ticket types' (Malfunction, Problem). The main area displays a table of tickets with columns: Ticket number, Subject, Last modification, Company, Age, and Status. Two tickets are listed, both in 'InProgress' status. The table includes pagination controls and a search bar.

| Ticket number | Subject | Last modification | Company | Age | Status |
|------------------------|--|----------------------|-------------------|-----|------------|
| MT#2023032900000119... | My PC is turning off after couple of minutes | 29.03.2023, 15:04:12 | Mint Service Desk | <1h | InProgress |
| MT#2023032900000119... | Strange problems with image quality/display. | 29.03.2023, 15:04:05 | Mint Service Desk | <1h | InProgress |

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:


This screenshot shows the dashboard with one ticket displayed. The ticket is bolded, indicating it is new. The table structure is the same as the previous screenshot.

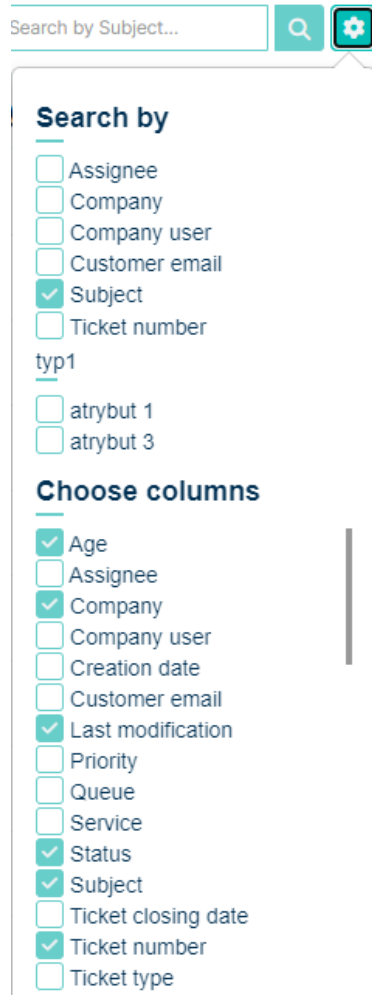
| Ticket number | Subject | Last modification | Company | Age | Status |
|-------------------------------|---|----------------------|-------------------|-----|------------|
| MT#2023032900000119... | My PC is turning off after couple of minutes | 29.03.2023, 15:08:19 | Mint Service Desk | <1h | InProgress |

The ticket you already opened:

This screenshot shows the dashboard with one ticket displayed. The ticket is no longer bolded, indicating it has been opened. The table structure is the same as the previous screenshots.

| Ticket number | Subject | Last modification | Company | Age | Status |
|------------------------|--|----------------------|-------------------|-----|------------|
| MT#2023032900000119... | My PC is turning off after couple of minutes | 29.03.2023, 15:08:19 | Mint Service Desk | <1h | InProgress |

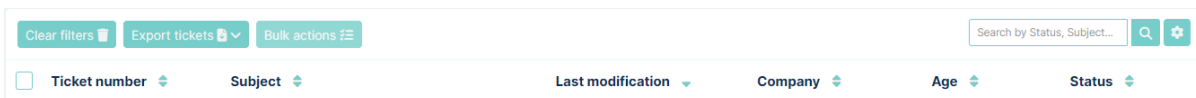
The attribute columns can be added or removed in the section “Set column properties” on the right side by clicking on the  button. Once you do that you will see a small window, where you can select the desired information you want to see on the tickets list. Making any changes in ‘Set column properties’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

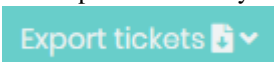


Also, you can look for specific tickets using the section “Search” field. Whatever you type here will be searched for, depending on the things you marked in the ‘Search by’ section of the ‘Set column properties’ window.



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

☐ Show closed

located on the right side of the Dashboard screen.



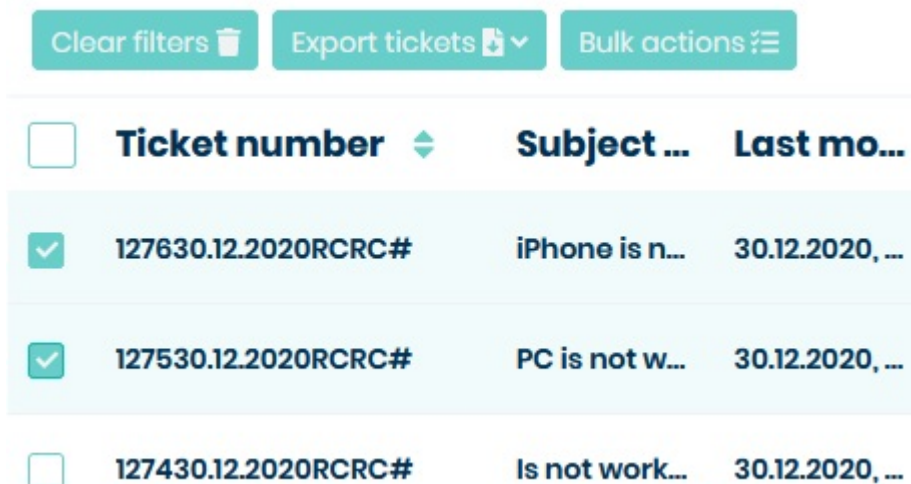
When you have plenty of Tickets on the list, you will have to use some additional navigation options, located below the list of Tickets, for moving between pages or for changing the number of Tickets that can be displayed on one page.



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 **Bulk actions** 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 **Bulk actions** 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.

Bulk actions

Action

Close 

Related tickets 0

Refresh related

☐ Close with related

Close

Apply

Apply without notification

- **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.

Bulk actions

Action

Close 

Related tickets 0

Refresh related

☐ Close with related

Action result

2 / 2 Operations completed

Report

Close

Apply

Apply without notification

To download the report of closed tickets, click on the

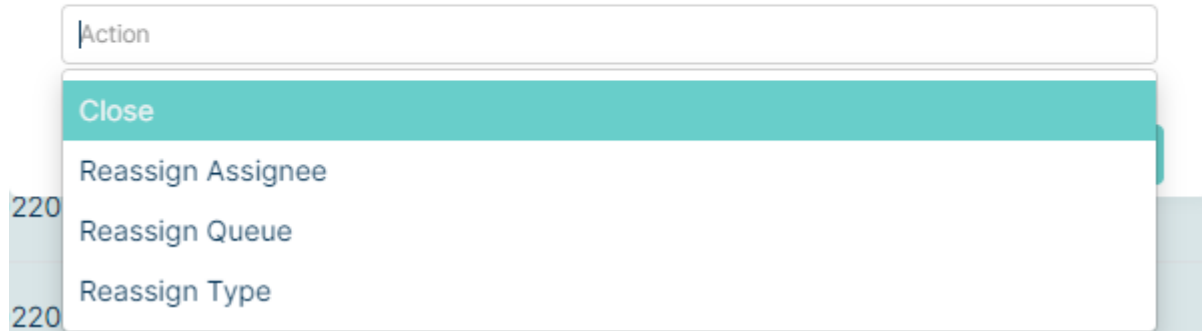
Report

 button.

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

Bulk actions



Action

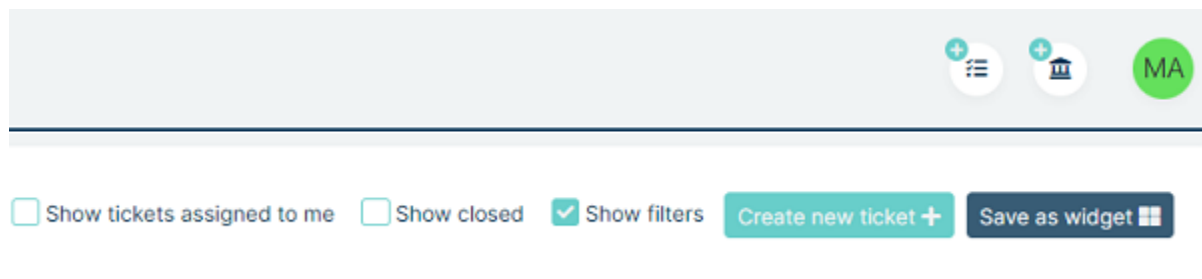


There are currently four bulk actions in the system:

- **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.

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.

CREATE NEW TICKET

<+📋+🏠MA

Assign company user

Company

Select company...

+

Company user

Select company user...

+

New ticket

Subject *

Subject...

Assets

Q

Ticket relation type

Select ticket relation type...

▼

Ticket type *

Select ticket type...

▼

Font

Size

Header

B

I

U

S

X₁

X¹

”

✎

🗑️

☰

☷

☹

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♏

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♑

♒

♓

Description *

🔗

😊

😄

Assign to queue *

Select queue...

▼

Priority

Select priority...

▼

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.

Assign company user

Company

Select company...

▼


+

Company user

Select company user...

▼

+

In this place, you 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.

Create a new Company

Name *

Name...

Address

Address

Latitude

Longitude

Cancel

Save

Create a new Company User

Email *

Email...

First name *

First name...

Last name *

Last name...

Phone number

Phone number...

Company

Select company...

Cancel

Save

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

Company Details

Name: Mint Service Desk

Address: Rzeszów, Polska

VAT-ID: 1234-1234-1234-1234

Description: Home of the makers of the Mint system.

Company user Details

Email: customer@mintsd.com

First name: MINT

Surname: Customer

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.

| Assets | | | | |
|--|--|--|--|--|
| <div> <div>Categories</div> <div> <div>Hardware - PC/laptops</div> <div>Hardware - phones</div> <div>Other</div> <div>Software - OS</div> <div>Software - other</div> </div> </div> <div> <div>Filter by</div> <div> <div>Period</div> <div>Select period...</div> </div> </div> | | <div> <div>Clear filters</div> <div>Export assets</div> <div>Search by Description, Name...</div> </div> <div> <div> <div>Id</div> <div>Name</div> <div>Description</div> <div>Creation date</div> <div>Action</div> </div> <div> <div>10</div> <div>Win 10, x64, OEM</div> <div></div> <div>29.03.2023, 14:36:27</div> <div>Edit</div> </div> <div> <div>9</div> <div>DELL Laptop for IT (room 328)</div> <div>New laptop for IT room 328 (IT)</div> <div>29.03.2023, 14:36:02</div> <div>Edit</div> </div> <div> <div>8</div> <div>3DS Max 10</div> <div>Graphical software for clients</div> <div>29.03.2023, 14:35:14</div> <div>Edit</div> </div> <div> <div>7</div> <div>MS Windows 10</div> <div></div> <div>29.03.2023, 14:34:50</div> <div>Edit</div> </div> <div> <div>6</div> <div>Dell latitude</div> <div>New laptop for IT Department</div> <div>29.03.2023, 14:34:29</div> <div>Edit</div> </div> <div> <div>5</div> <div>iPhone 15</div> <div>New iPhone phone for IT Department</div> <div>29.03.2023, 14:33:25</div> <div>Edit</div> </div> </div> <div> <div> <div>10</div> <div>6</div> </div> <div>Total elements: 6</div> </div> | | |

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.

Knowledge Base

PC/Laptop - temperatures


Hardware related - PC/laptop problems, 29.12.2020, 15:16:22

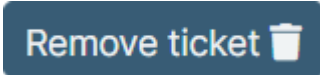


To see the details just click on the topic and a new window will appear.

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

TICKET DETAILS

Keyboard issue

Today

customer@mintsd.com (Customer Customer) | 25.09.2023, 16:18:10 | New

I manage some issues with my Keyboard

Internal discussion

CC Company user

customer@mintsd.com (Customer Customer) | 25.09.2023, 16:18:19 | New

Some buttons are not working properly

Internal discussion

CC Company user

Email Customer Portal Internal note

Enter a message...

Preview Reply

Details

Ticket number: MT#20230925000000009

Company user: Customer Customer customer@mintsd.c...

Company: Mint Service Desk

Phone number: No value

Status: Open

Ticket relation type: Ticket relation type...

Assignee: Assignee...

Queue: Problems

Assets: Search

Ticket type: Hardware problems

Service: Service...

Priority: Priority...

Reminder: Reminder...

Age: <1h

Estimation: ?

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

TICKET DETAILS

Mouse problems

Today

customer@mintsd.com (Customer Customer) | 25.09.2023, 16:18:57 | New

My mouse is broken

Internal discussion

CC Company user

customer@mintsd.com (Customer Customer) | 25.09.2023, 16:19:01 | New

I need a new one immediately

Internal discussion

CC Company user

Email Customer Portal Internal note

Enter a message...

Preview Reply

Details

Ticket number: MT#20230925000000010

Company user: Customer Customer customer@mintsd.c...

Company: Mint Service Desk

Phone number: No value

Status: Open

Ticket relation type: Ticket relation type...

Assignee: Assignee...

Queue: Problems

Assets: Search

Ticket type: Hardware problems

Service: Service...

Priority: Priority...

Reminder: Reminder...

Age: <1h

Estimation: ?

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

| <input type="checkbox"/> | Ticket number | Subject | Last modification... | Company | Age | Status | Company user |
|--------------------------|-----------------------|----------------|----------------------|-------------------|-----|------------|-------------------|
| <input type="checkbox"/> | MT#202309250000000... | Mouse problems | 25.09.2023, 15:58:50 | Mint Service Desk | <1h | InProgress | Customer Customer |
| <input type="checkbox"/> | MT#202309250000000... | Keyboard issue | 25.09.2023, 15:55:40 | Mint Service Desk | <1h | InProgress | Customer Customer |

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

Merge button is visible in upper right in the “Details” section

TICKET DETAILS

Keyboard issue

Today

customer@mintsd.com (Customer Customer) | 25.09.2023, 16:18:10 | New

I manage some issues with my Keyboard

Internal discussion

CC Company user

customer@mintsd.com (Customer Customer) | 25.09.2023, 16:18:19 | New

Some buttons are not working properly

Internal discussion

CC Company user

Email Customer Portal Internal note

Enter a message...

Preview Reply

Details

Merge

Ticket number: MT#20230925000000009

Company user: Customer Customer customer@mintsd.c...

Company: Mint Service Desk

Phone number: No value

Status: Open

Ticket relation type: Ticket relation type...

Assignee: Assignee...

Queue: Problems

Assets: Search

Ticket type: Hardware problems

Service: Service...

Priority: Priority...

Reminder: Reminder...

Age: <1h

Estimation: ?

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

All queues

Queues

Problems

Ticket types

Hardware problems

☐ Show closed

Search by Subject...

| Ticket number | Subjec... | Last m... | Compa... | Age | Status ... |
|---|--------------|--------------|---------------|-----|------------|
| <input checked="" type="checkbox"/> MT#202309250000000... | Mouse pr... | 25.09.202... | Mint Servi... | <1h | Open |
| <input type="checkbox"/> MT#202309250000000... | Keyboard ... | 25.09.202... | Mint Servi... | <1h | Open |

<<

<

1

>

>>

Total elements: 2

10

Cancel

Save

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:

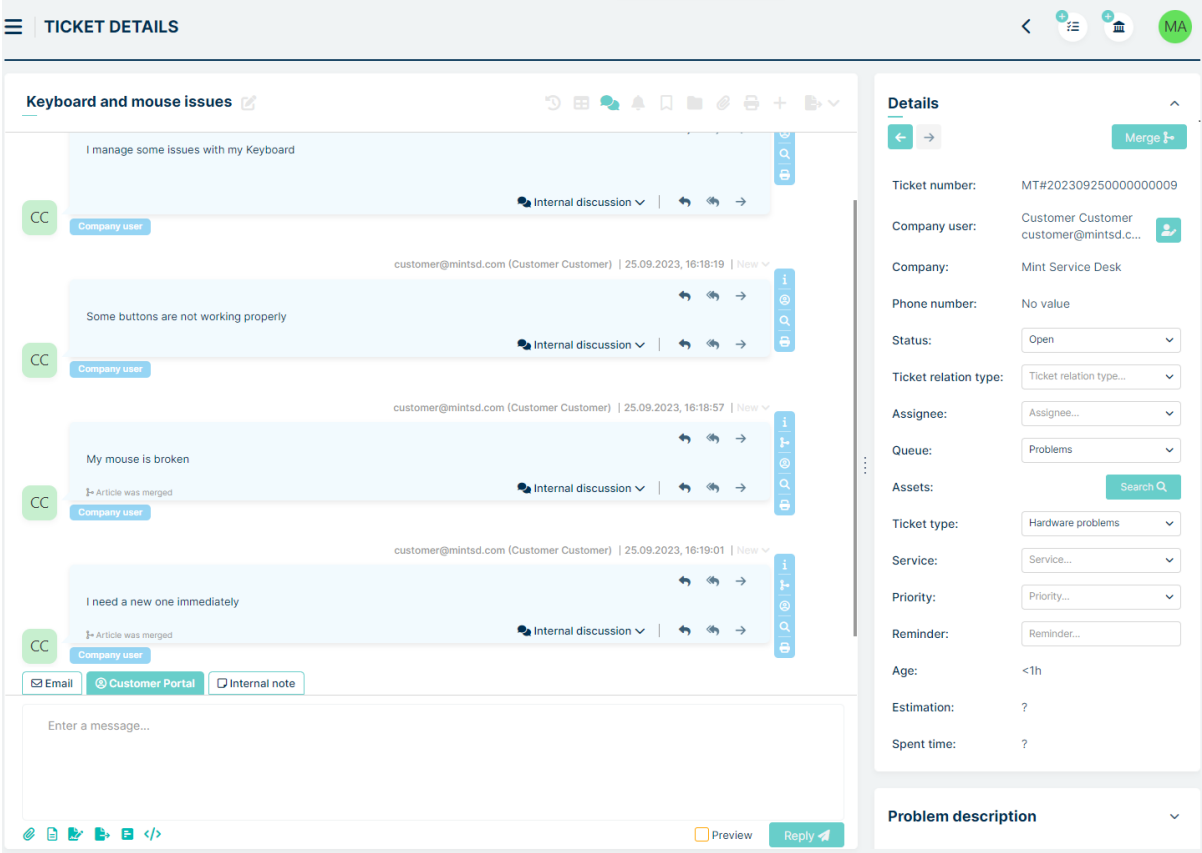
Are you sure you want to merge the current ticket with the selected one?

The merge will move all articles from the current ticket to the one you selected.

Yes

No

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.

History: Keyboard and mouse issues

Below is a list of tickets, that have been merged into this one:
MT#202309250000000010

Search history: Search history

| 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.

TICKET DETAILS

Mouse problems

A ticket has been merged to another, you will now find all the articles contained in this ticket [here](#)

Search history:

| User | Modification date | Property | Old value | New value |
|------------|----------------------|----------|-----------------------|-----------------------|
| Mint Agent | 25.09.2023, 16:22:10 | Merge | MT#202309250000000010 | MT#202309250000000009 |

Details

← →

Ticket number: MT#202309250000000010

Company user: Customer Customer
customer@mintsd.com

Company: Mint Service Desk

Phone number: No value

Status:

Merged

Ticket relation type:

Ticket relation type...

Assignee:

Assignee...

Queue:

Problems

Assets:

Search Q

Ticket type:

Hardware problems

Service:

Service...

Priority:

Priority...


Reminder:

Reminder...

Age: 15h

Estimation: ?

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

TICKET DETAILS

History: Hardware issue

Search history:

Search history

| User | Modification date | Property | Old value | New value |
|------------|----------------------|--------------|------------|-------------------|
| Mint Agent | 04.07.2023, 12:39:03 | Company user | Mint Agent | Customer Customer |
| Mint Agent | 04.07.2023, 12:39:03 | Company | | Mint Service Desk |

Email

Customer Portal

Internal note

Enter a message...

Preview

Reply

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.

Status:

InProgress

Ticket relation type:

Ticket relation type...

Assignee:

Mint Agent

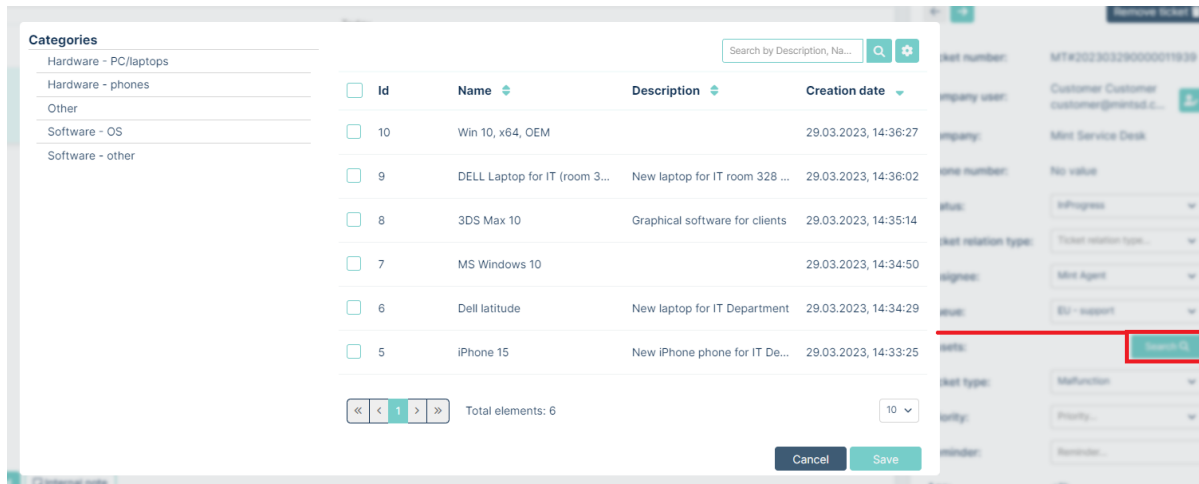
Queue:

EU - support

Assets:

Search

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:

Ticket relation type:

Select ticket relation type...

| | | |
|----------|-------------------|---|
| Parents | I have a problem | × |
| | I need an answer! | × |
| | Please help me | × |
| Subtasks | Error | × |
| | I need an answer! | × |

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).

Reminder:

Reminder...

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

Reminder

< **March 2023** >

| | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----|-----|-----|-----|-----|-----|-----|-----|
| 9 | 26 | 27 | 28 | 01 | 02 | 03 | 04 |
| 10 | 05 | 06 | 07 | 08 | 09 | 10 | 11 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 12 | 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 13 | 26 | 27 | 28 | 29 | 30 | 31 | 01 |
| 14 | 02 | 03 | 04 | 05 | 06 | 07 | 08 |

16 : 12

Notes

Delete

Cancel

Save

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


Estimation

Estimation

e.g. 1w6h30m = 1 week 6 hours 30 minutes

Cancel

Save

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:

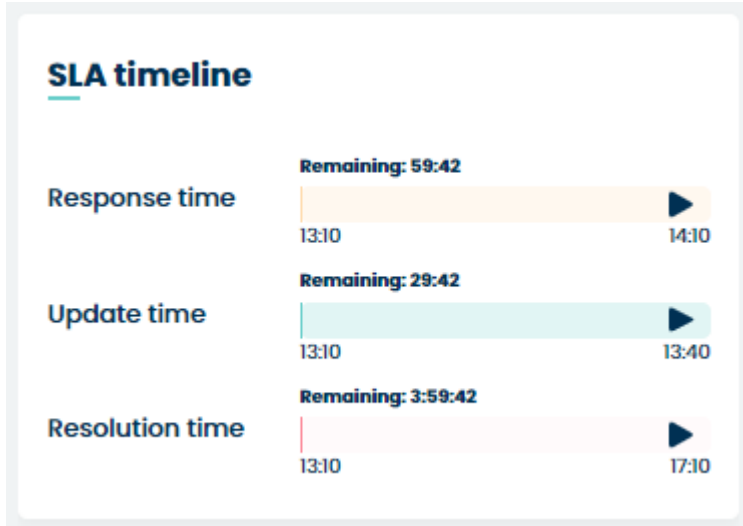
- **w:** weeks
- **d:** days
- **h:** hours
- **m:** minutes

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.

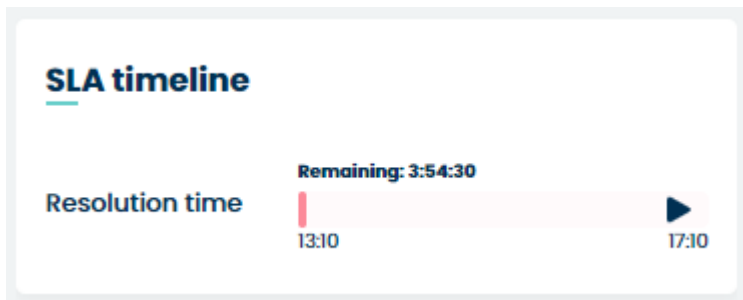
The moment Client creates a Ticket (if he’s using Mint) or a new ticket is created from email message, that new ticket will be waiting for an Agent to be assigned to it.

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.

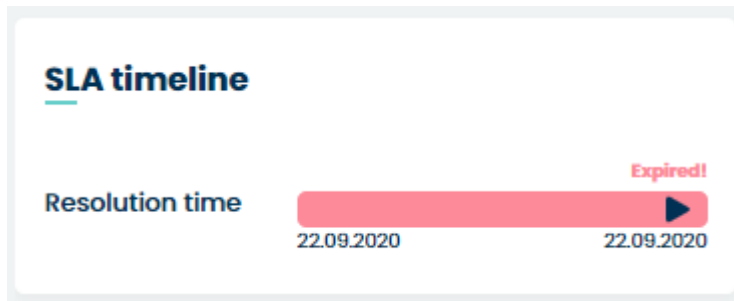


If the Ticket state will be changed to the one which has also a 'Stop SLA' option activated (see 'Admin>Tickets>Statuses') the SLA timer will be stopped.



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.

Details

Description: Problem with display.

Place of the incident: Rzeszów, Polska

Contact number: +48 555666777

Impact level: High

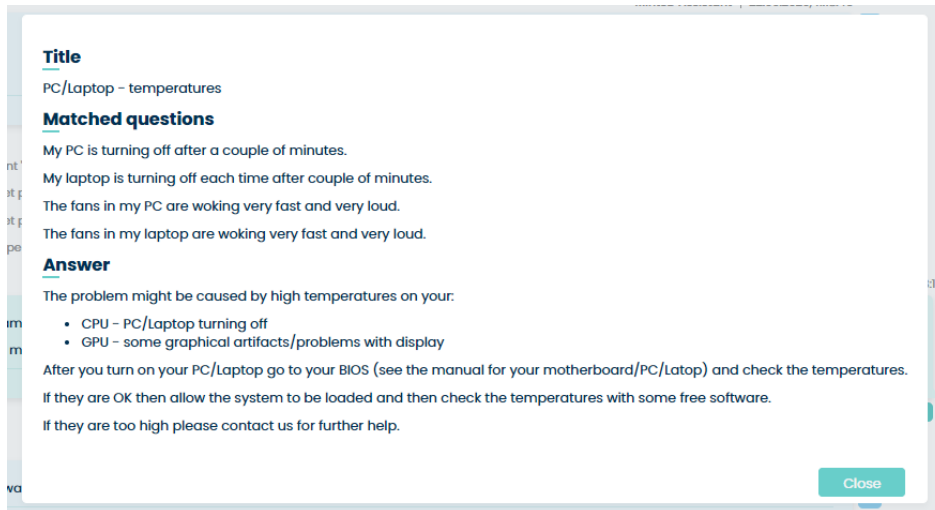
Below the Details, unlike the Customer user, an Agent is able to see the Knowledge Base topics that have been found and might include some useful information or even a solution to the Client's problem. If you don't see any Knowledge Base information here it means that the system has not found any topics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

Knowledge Base

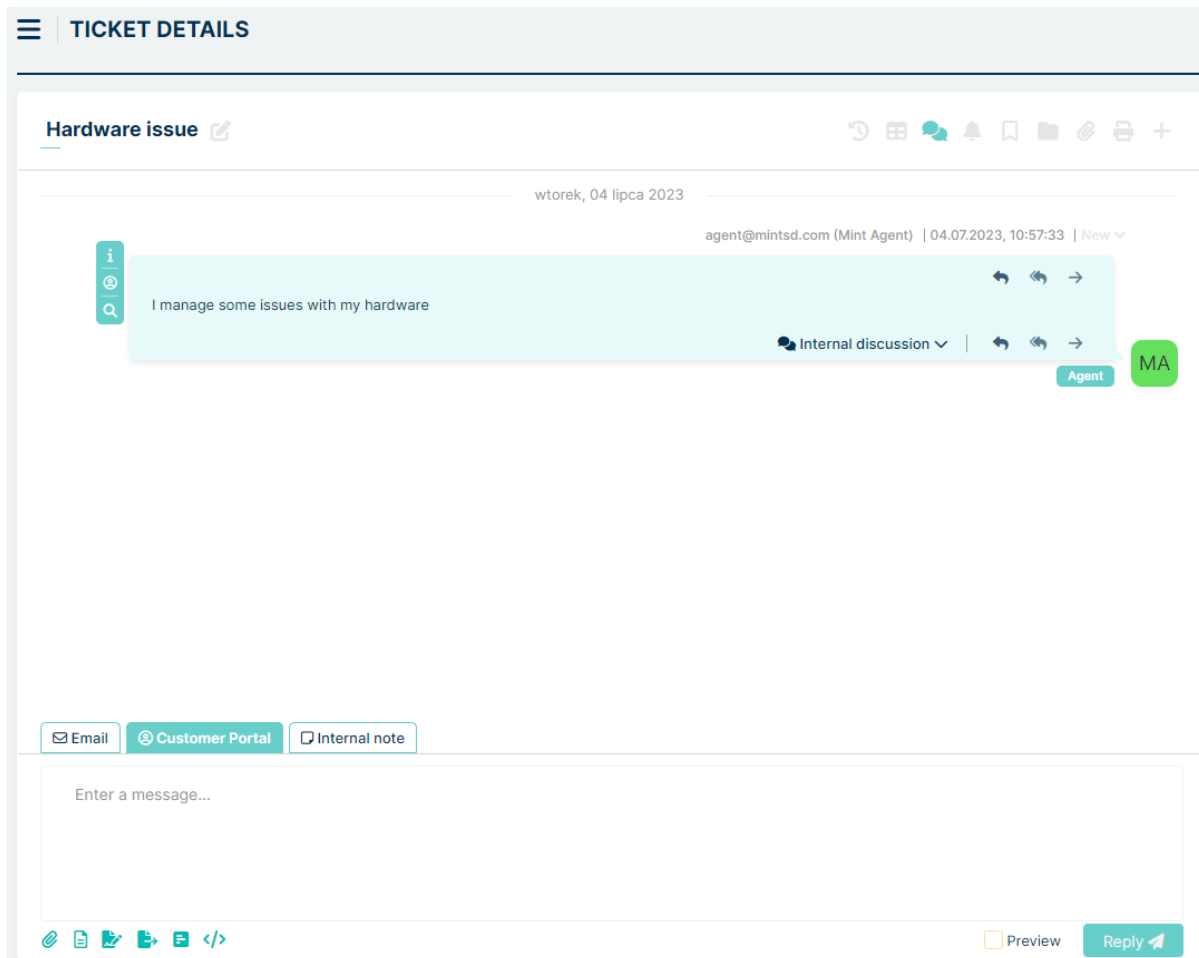
PC/Laptop - temperatures



Hardware related :: PC/laptop problems, 29.12.2020, 15:16:22

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

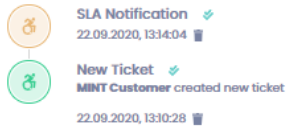


Now let's go back to the main section of the Ticket Details view. The messages and details of the communication are the main part and take the most space.



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.

Notifications



[See previous activities →](#)

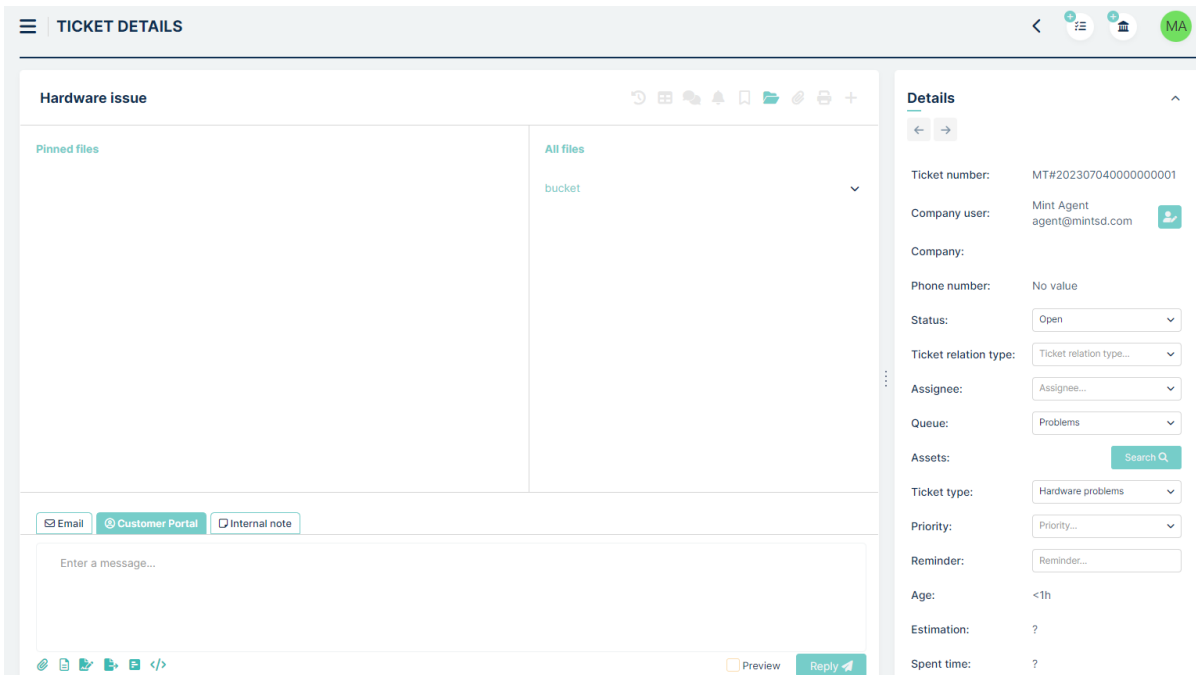
The second one, once activated (🔔) will send you notifications each time something new happens within the ticket. There are also three more buttons we need to describe.



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

All files

bucket

docx file.docx



Add

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

TICKET DETAILS

Hardware issue

Pinned files

All files


bucket

docx file.docx

☒

Add

Clicking Add 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:

Do you want to unpin the file?

Yes

No

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.

The screenshot shows the 'TICKET DETAILS' page for a 'Hardware issue'. The left sidebar contains 'Pinned files' (docx file.docx) and 'All files' (bucket). The main content area has a message input field and buttons for 'Email', 'Customer Portal', and 'Internal note'. The right sidebar shows ticket details: Ticket number (MT#202307040000000001), Company user (Customer Customer), Company (Mint Service Desk), Phone number (No value), Status (Open), Ticket relation type (Ticket relation type...), Assignee (Assignee...), Queue (Problems), Assets (Search Q), Ticket type (Hardware problems), Priority (Priority...), Reminder (Reminder...), Age (2h), and Estimation (?). A green toast message 'Downloading started' is visible in the top right corner.

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

The screenshot shows the 'TICKET DETAILS' page for a 'Hardware issue'. The left sidebar contains 'Pinned files' (docx file.docx) and 'All files' (bucket, docx file.docx). The main content area has a message input field and buttons for 'Email', 'Customer Portal', and 'Internal note'. The right sidebar shows ticket details: Ticket number (MT#202307040000000001), Company user (Customer Customer), Company (Mint Service Desk), Phone number (No value), Status (Open), Ticket relation type (Ticket relation type...), Assignee (Assignee...), Queue (Problems), Assets (Search Q), Ticket type (Hardware problems), Priority (Priority...), Reminder (Reminder...), Age (2h), and Estimation (?). A blue toast message 'Preparing the file' is visible in the top right corner, indicating that the file is being prepared and the download will start soon.

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

Do you want to download this file?

This file is large, you can only download one large file at a time.

Cancel

Download

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

Do you want to download this file?

The file download is about to start, do not close this modal otherwise you will abort the file download. When the download is finished, you can close this window.

Stop downloading


....

When download is finished, the Close button appear:

Do you want to download this file?

The file download is about to start, do not close this modal otherwise you will abort the file download. When the download is finished, you can close this window.

Close

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.

TICKET DETAILS

Hardware problems

Attachments

| Name | Size | Date |
|---------------------------------|---------|----------------------|
| attachment1.png | 10.1 kB | 11.07.2023, 14:05:39 |

Inline attachments

| Name | Size | Date |
|-----------------------------|---------|----------------------|
| inline1.png | 10.1 kB | 11.07.2023, 14:05:18 |

Email

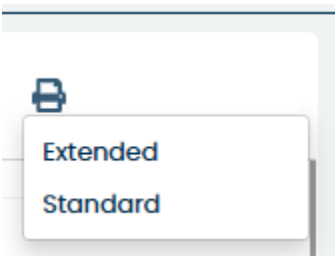
Customer Portal

Internal note

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#202009220000000001 |
| 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.

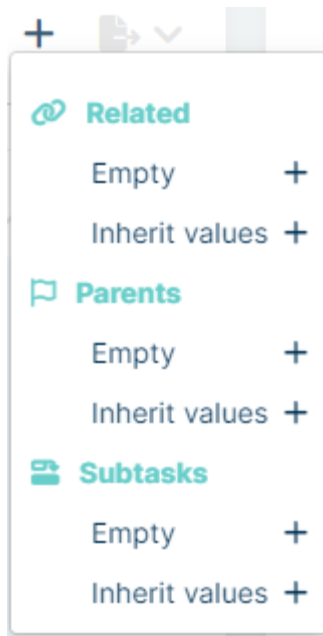
The difference between the 'Standard' and 'Extended' version of the saved .pdf file is that the 'Extended' version also includes system messages such as information about 'Priority' being changed or the Agent being assigned to the ticket.

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 or Subtask to current, making similar step as with Related ticket.

| | | |
|------------------------------|--|---|
| Ticket relation type: | Ticket relation type... ▼ | |
| Parents: | Screen problems | × |
| Subtasks: | Strange problems with image quality/display. | × |
| Related: | My PC is turning off after couple of minutes | × |

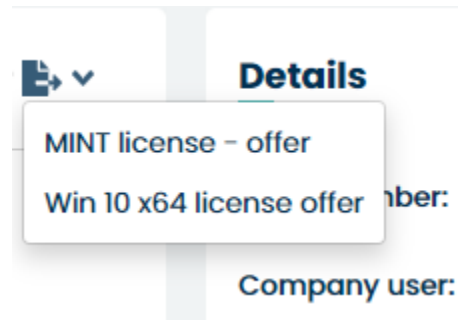
The last button (📄 ▼) is used for generating a document.



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:

Mint Agent

Prepared for:

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:

{{Assignee}}

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.

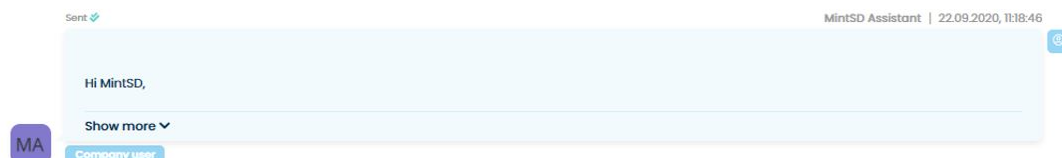
The whole process of creating Document templates and using Placeholders is described in the Admin > Tickets > Document templates part of this guide.

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.

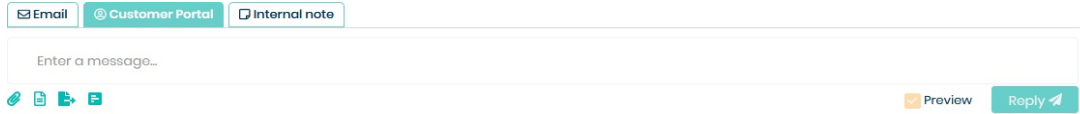
Now, when you have a document filled with data you can print it or e.g. send it to the customer as an attachment.

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 be shortened – in order to see the whole text you need to click [Show more](#).

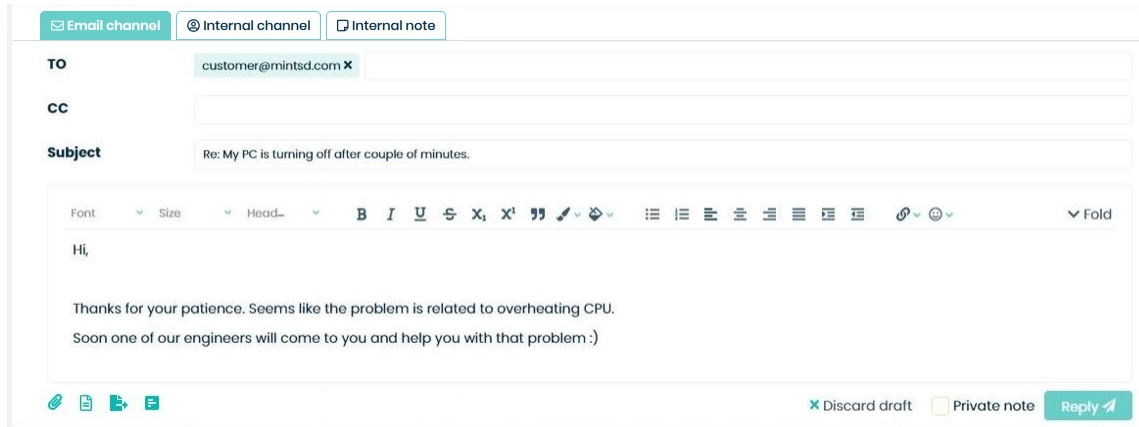


Now, if you want to write a message you can type it in the text box and send it by clicking on [Reply](#) button.



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

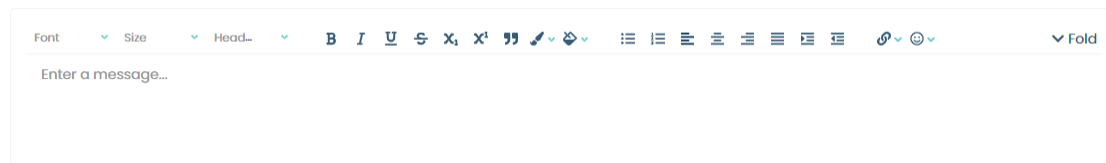
The first one, “Email channel” is used for communication with a client who’s using his email account (and not MINT Service Desk system). If you want, you can also add someone in CC to receive a copy of your message.



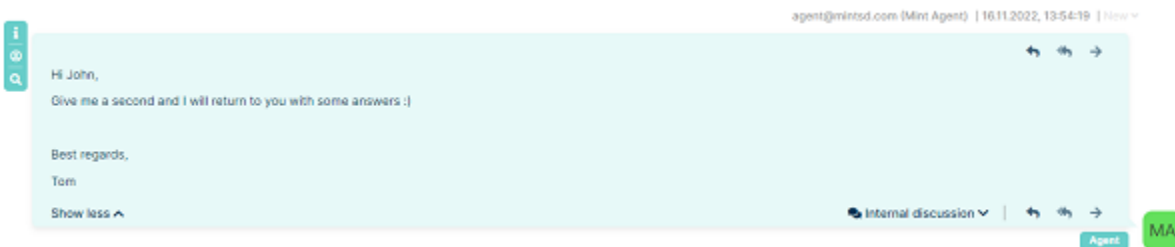
Second one, “Customer portal” is used for communication with a client who is a registered user and has an account/is using the MINT Service Desk system.

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.

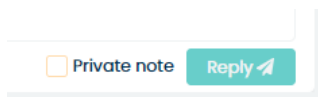
In all cases, you can format your message by using the text editor, which will be displayed once you click on the ‘Enter the message...’ field.



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.

Choose template response

Template

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

Choose template response

Template

Hi Mint,

Thank you for creating a Ticket. We will start working on it as soon as possible.

Best regards,

MINT Service Desk

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.

Select signature

Add signature

Template...



Add

Cancel

Delete preference

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

Select signature

Add signature

Signature



Preview

Regards,

Joe

☐ Set as default automatic mail signature for this queue


Add


Cancel

Delete preference

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  button.

To cancel adding a signature press  button.

To remove the signature preference, press  button.

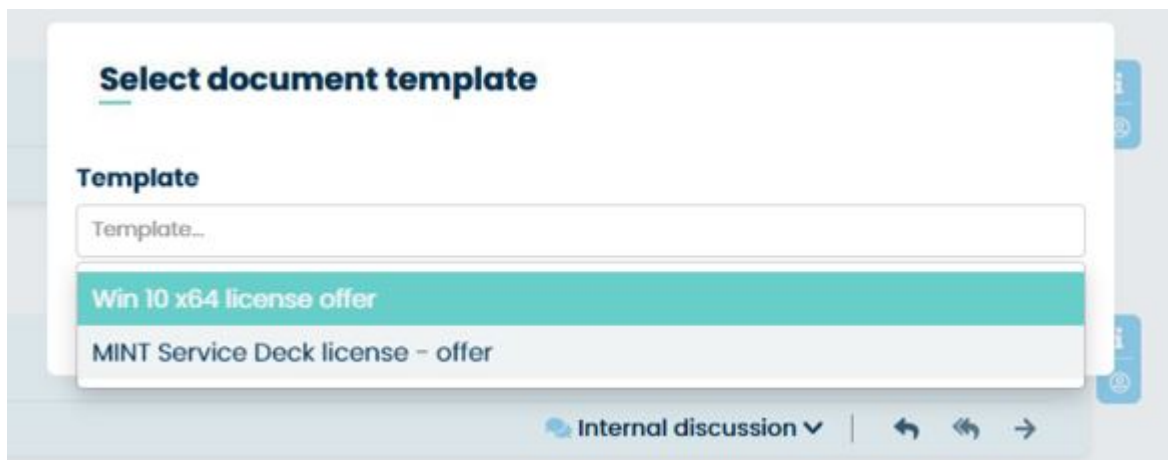
The next thing you can do before sending the message is that you can attach a document based on a template (Admin > Tickets > Document Templates). To do that you need to use the ‘Attach document’ option.



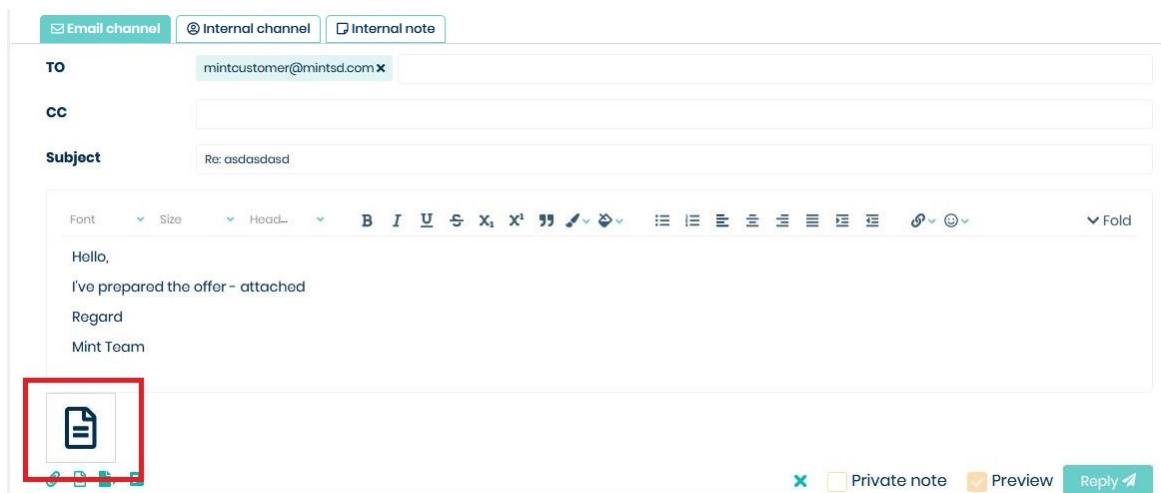
Click on the 'Attach document' located at the bottom of the communication section inside the 'Ticket details' view.



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.



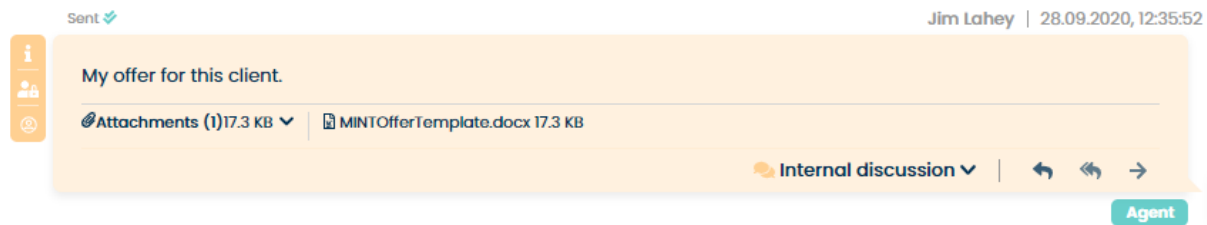
Click on the ‘Select survey’ located at the bottom of the communication section inside the ‘Ticket details’ view.

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.

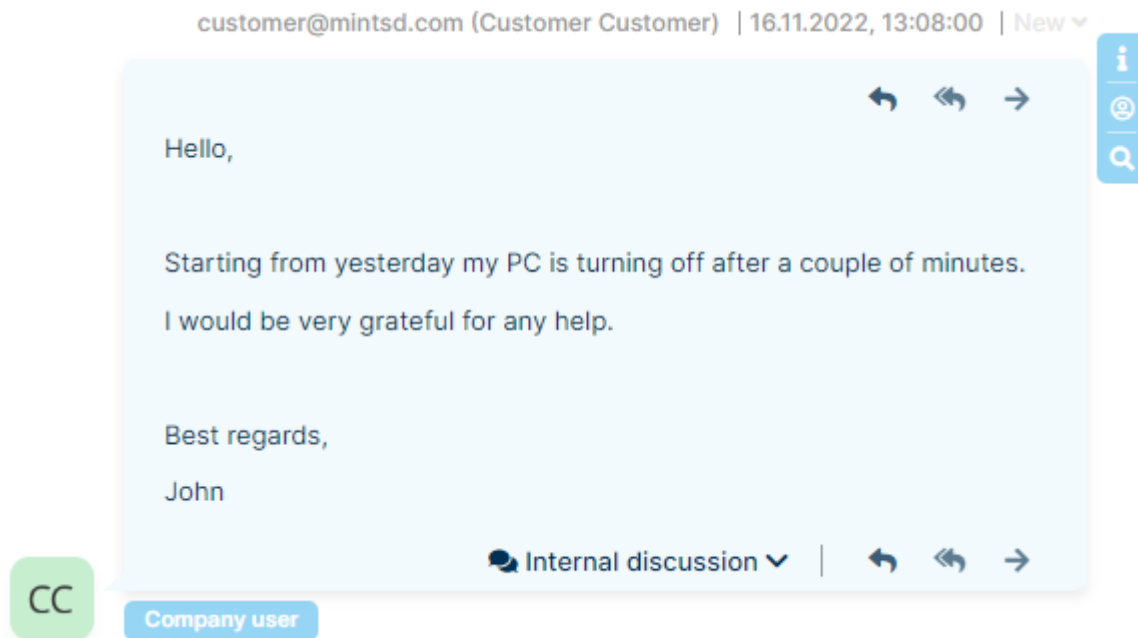


Click ‘Reply’ and you will see a new internal message.



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

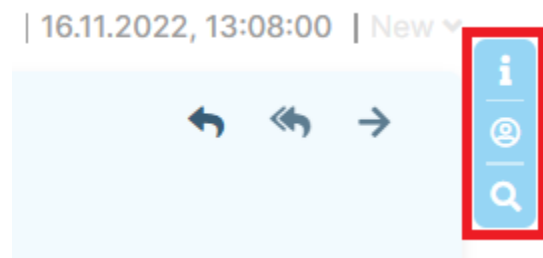
The other important thing within communication is that you can add some internal comments next to any internal message and by that to start an “Internal discussion” with other agents in order to discuss the problem. Just click on ‘internal discussion’ in any of the messages and type a message in ‘Talk 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 [\(i\) Internal discussion](#) link.

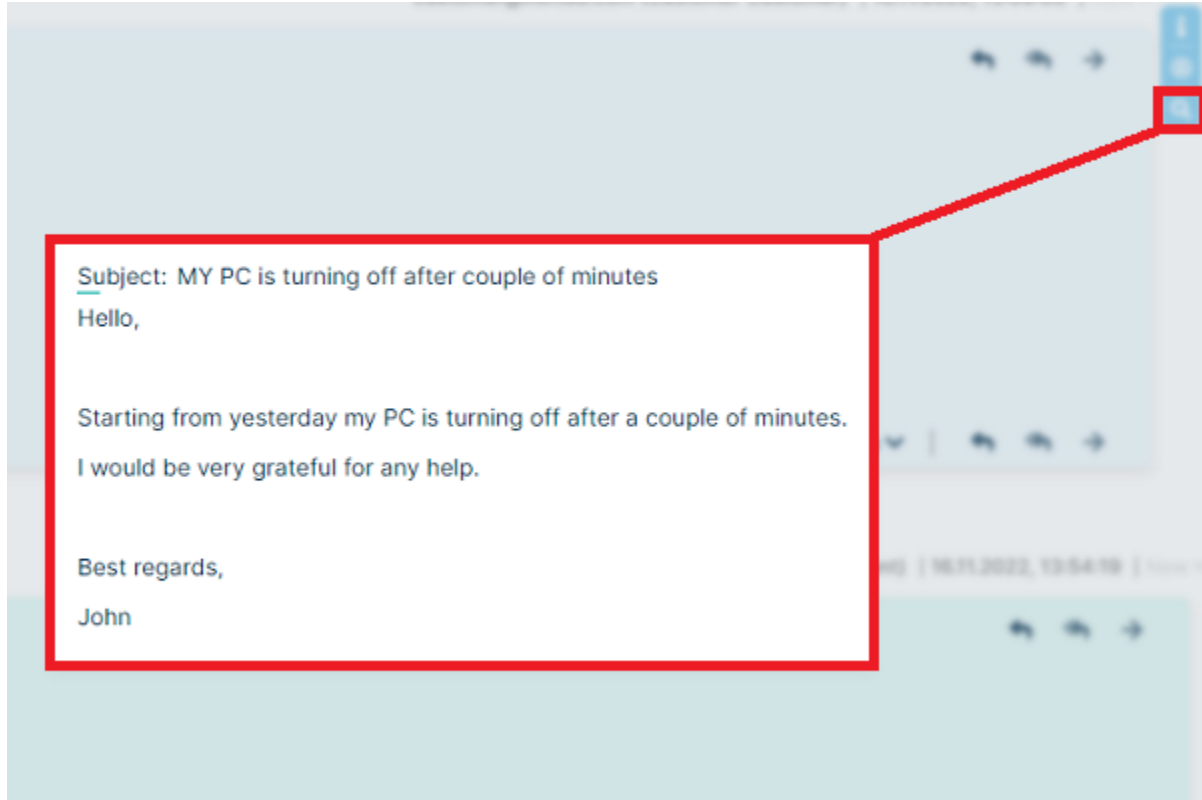
The next thing, as you probably already noticed, is that there are some small icons on the side of each article/message.



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.

Subject: Autoresponse
Channel: Internal
From: MintSD Assistant
TO: customer@mintsd.com

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

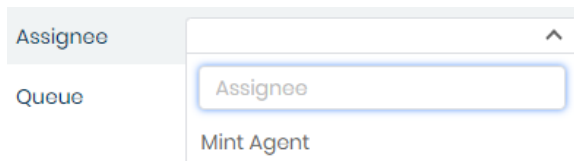


When there is a new message or system information waiting for you within the Ticket Details, apart from receiving notifications on the sidebar, the moment you enter the Ticket Details view you will see, on the bottom part of the Chat section, the following message.

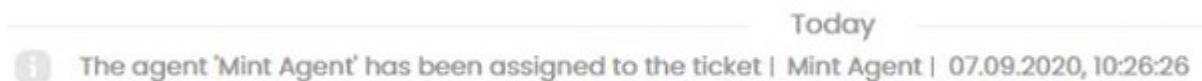
Hi! There are new comments and opinions during your absence. See → Mark as read ×

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 **Save as widget** button.

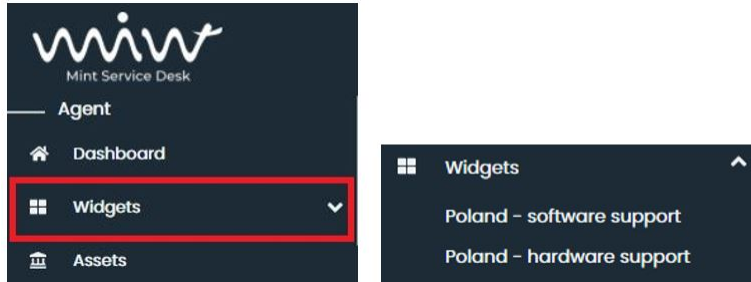
A new window will appear, where you need to type the name for your widget and click on the **Save** button.

Add custom widget

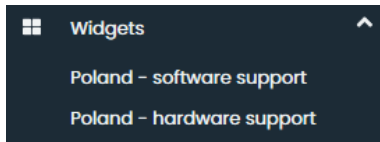
Widget name

CancelSave

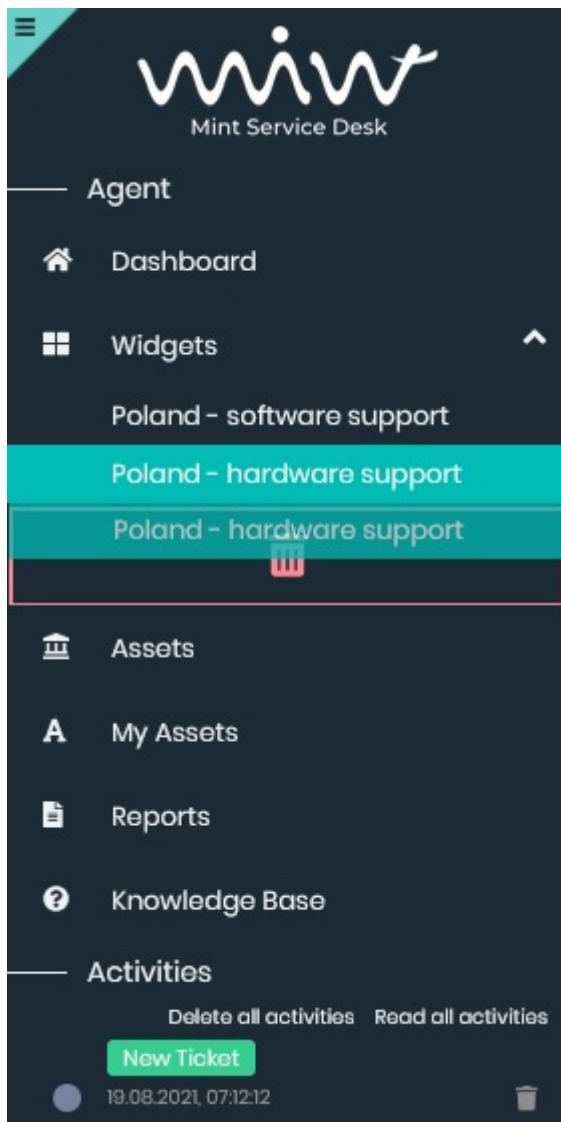
After you do that, on the left side menu, in the 'Widgets' section, you will see a newly created widget.



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 down over the Trash Can icon (it will be invisible until you move the widget down).



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

4.4.6 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.

CREATE ASSET

New asset

Name*

Description

Categories*

Assigned agents:


Company

Attachments

Now, an Agent needs to 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.

EDIT ASSET

Edit asset Show related tickets

Name*

Description

Categories*

Assigned agents:

Company

Assigned company users:

Attachments

PC / laptops ^

Type

CPU producer

CPU model

GPU producer

GPU model

Memory

Video memory

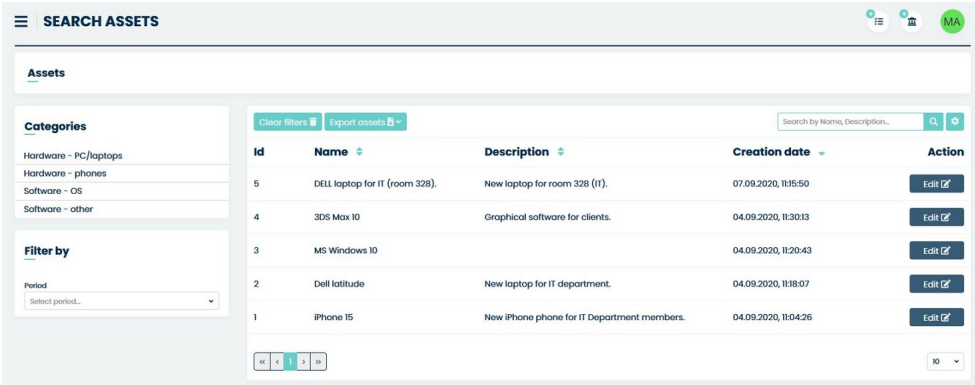
HDD type

HH size

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


4.4.7 ASSETS

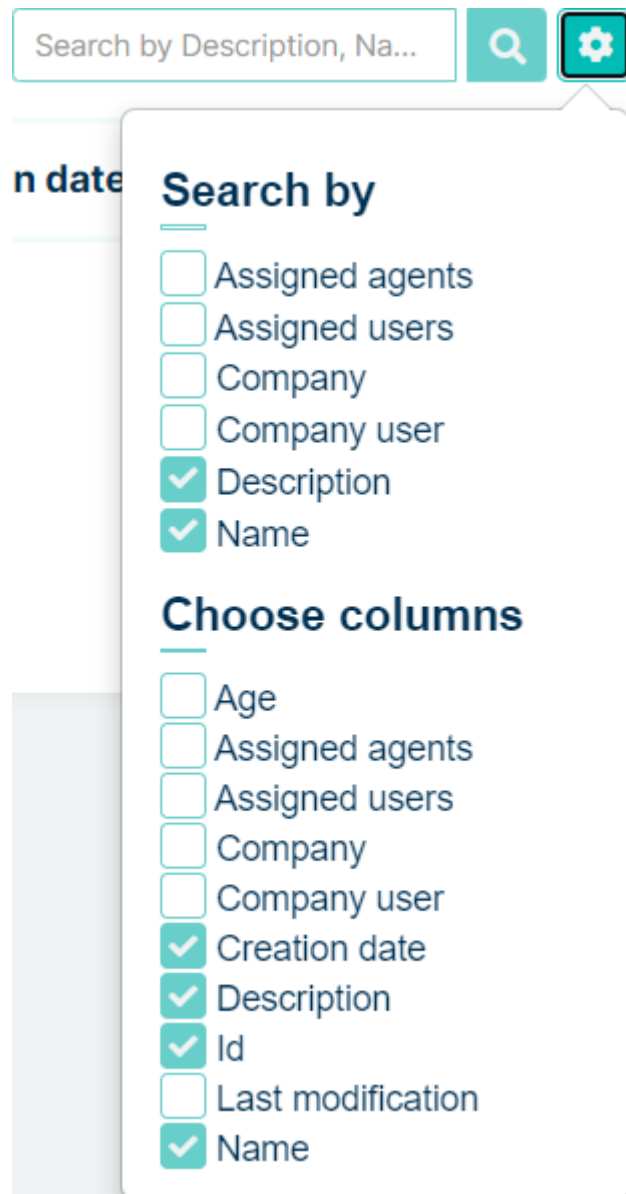
The default view in this section shows the list of available assets, along with some filtering options.



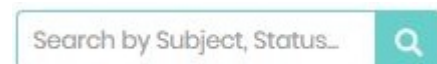
Right here you can filter assets by ‘Categories’ or by ‘Period’. If you want to reset active filters, just click on the **Clear filters** button. You can also remove any selections (Categories, Filters) by clicking on **X** or **X** button right next to each position.



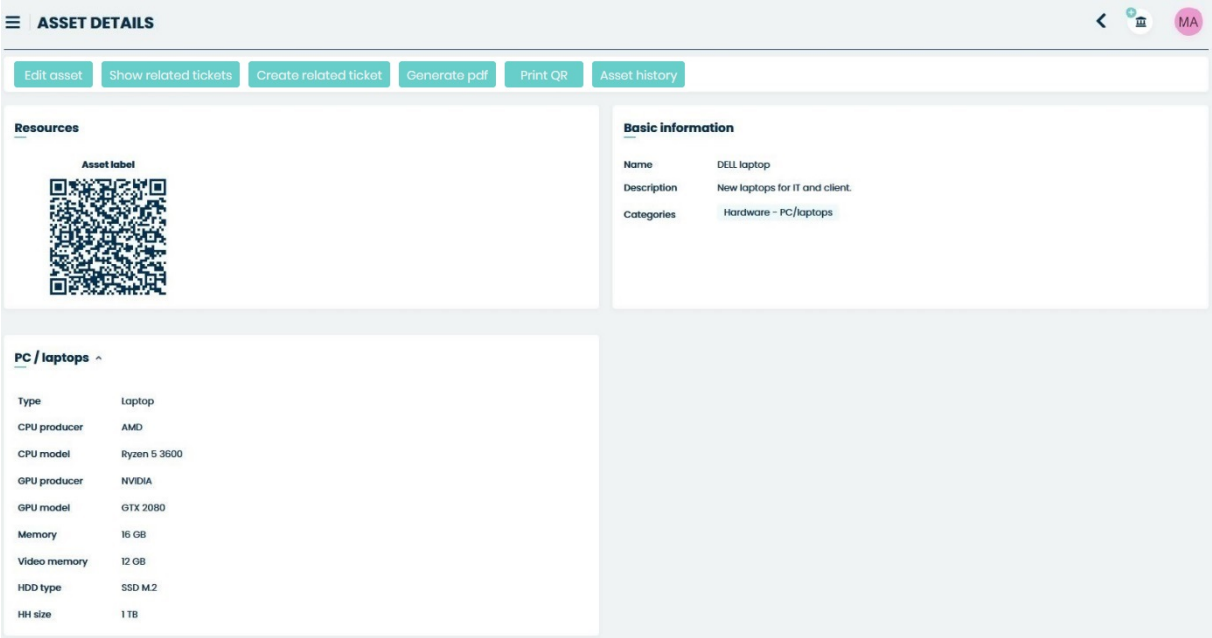
The attribute columns can be added or removed in the section “Set column properties” on the right side by clicking on the  button. Once you do that you will see a small window, where you can select the desired information you want to see on the assets list. Making any changes in ‘Set column properties’ 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.

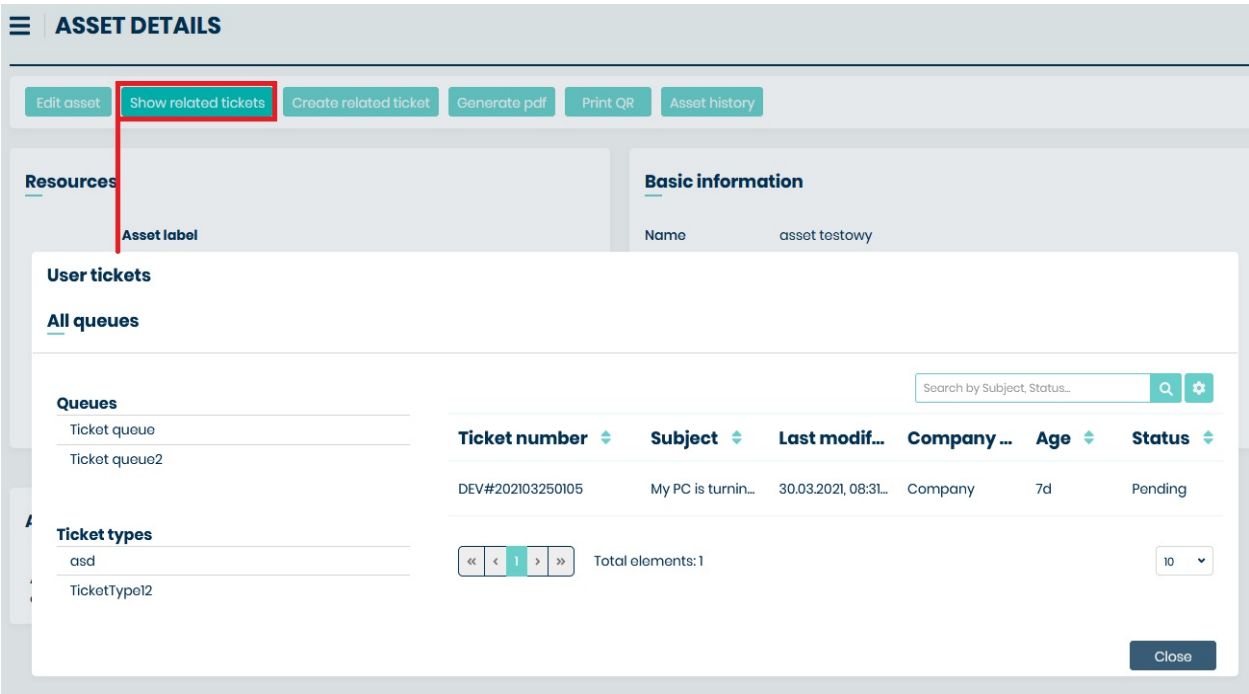


If you want to see the details of any asset, just click on it. It will open the Asset details view.



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

Show related tickets




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.

ASSET DETAILS

Edit asset
Show related tickets
Create related ticket
Generate pdf
Print QR

Resources


Asset label



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.

ASSET DETAILS

Edit asset
Show related tickets
Create related ticket
Generate pdf
Print QR

You can also use the  button available on the right side of the Asset list on the main view.

Clear filters Export assets

Search by Name, Description...

| Id | Name | Description | Creation date | Action |
|----|--------------------------------|---|----------------------|--------|
| 5 | DELL laptop for IT (room 328). | New laptop for room 328 (IT). | 07.09.2020, 11:15:50 | Edit |
| 4 | 3DS Max 10 | Graphical software for clients. | 04.09.2020, 11:30:13 | Edit |
| 3 | MS Windows 10 | | 04.09.2020, 11:20:43 | Edit |
| 2 | Dell latitude | New laptop for IT department. | 04.09.2020, 11:18:07 | Edit |
| 1 | iPhone 15 | New iPhone phone for IT Department members. | 04.09.2020, 11:04:26 | Edit |

1

10

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.

4.4.8 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.

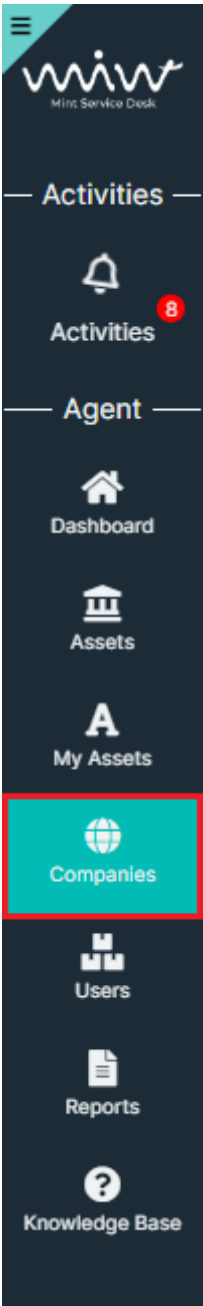
4.4.9 COMPANIES

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* | <input type="text" value="Agent Roles"/> |
| Description | <input type="text" value="Description"/> |
| Change user assigned to ticket ⓘ | <input checked="" type="checkbox"/> |
| Edit company user details ⓘ | <input checked="" type="checkbox"/> |
| Edit company ⓘ | <input checked="" type="checkbox"/> |
| Edit asset user ⓘ | <input checked="" type="checkbox"/> |
| Edit asset company ⓘ | <input checked="" type="checkbox"/> |
| Edit asset categories ⓘ | <input checked="" type="checkbox"/> |
| Edit asset agents ⓘ | <input checked="" type="checkbox"/> |
| Report creator ⓘ | <input checked="" type="checkbox"/> |
| Remove ticket ⓘ | <input checked="" type="checkbox"/> |
| Assign company user to company ⓘ | <input checked="" type="checkbox"/> |
| Manage companies ⓘ | <input checked="" type="checkbox"/> |
| Manage users ⓘ | <input checked="" type="checkbox"/> |

CancelSave



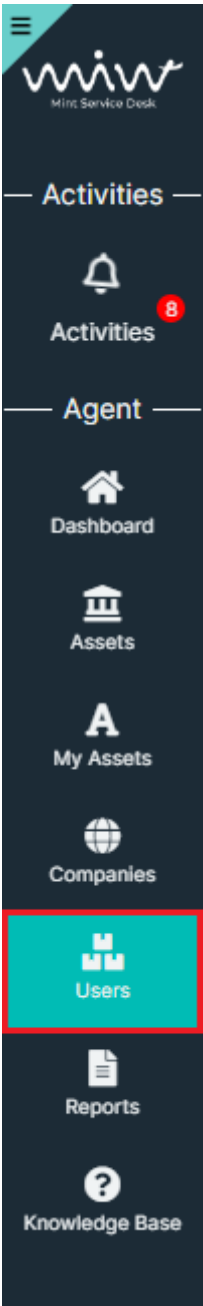
The capabilities of this site are outlined in the admin documentation.

4.4.10 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* | <input type="text" value="Agent Roles"/> |
| Description | <input type="text" value="Description"/> |
| Change user assigned to ticket ⓘ | <input checked="" type="checkbox"/> |
| Edit company user details ⓘ | <input checked="" type="checkbox"/> |
| Edit company ⓘ | <input checked="" type="checkbox"/> |
| Edit asset user ⓘ | <input checked="" type="checkbox"/> |
| Edit asset company ⓘ | <input checked="" type="checkbox"/> |
| Edit asset categories ⓘ | <input checked="" type="checkbox"/> |
| Edit asset agents ⓘ | <input checked="" type="checkbox"/> |
| Report creator ⓘ | <input checked="" type="checkbox"/> |
| Remove ticket ⓘ | <input checked="" type="checkbox"/> |
| Assign company user to company ⓘ | <input checked="" type="checkbox"/> |
| Manage companies ⓘ | <input checked="" type="checkbox"/> |
| Manage users ⓘ | <input checked="" type="checkbox"/> |



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

4.4.11 ACCESS GROUPS

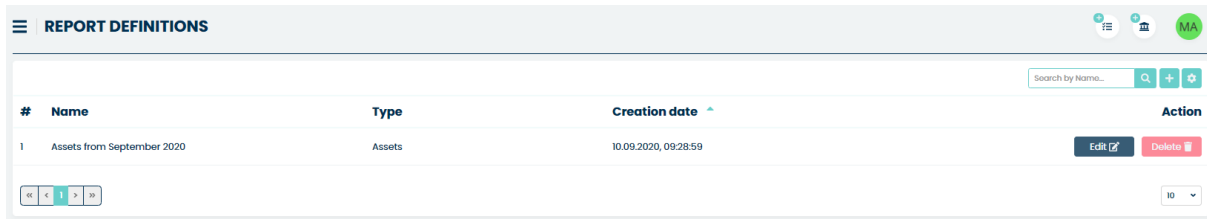
This part has been described in admin documentation. To have access to this module, Agent must have the “Manage users” role assigned by admin in agent roles (like in “Users” part above)


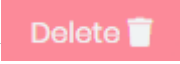
4.4.12 REPORTS

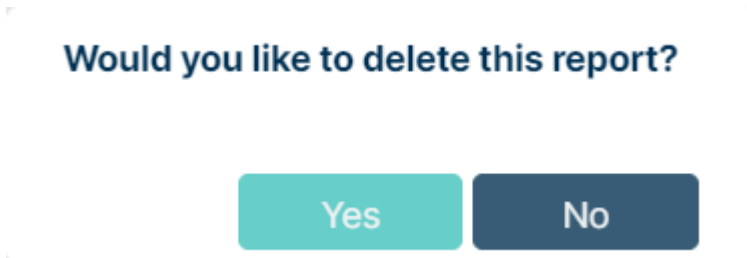
This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

In this part of the MINT Service Desk system Agent is able to create and export reports containing information on Tickets, Assets, Users or Contracts. Other users (Admin, Customer) cannot do that.

By default, the ‘Reports definitions’ view shows the list of already created reports.




Right here you can do a couple of things: you can edit already existing reports () or even completely delete them from the system (). When you try to delete a report, system will ask you to confirm your choice.



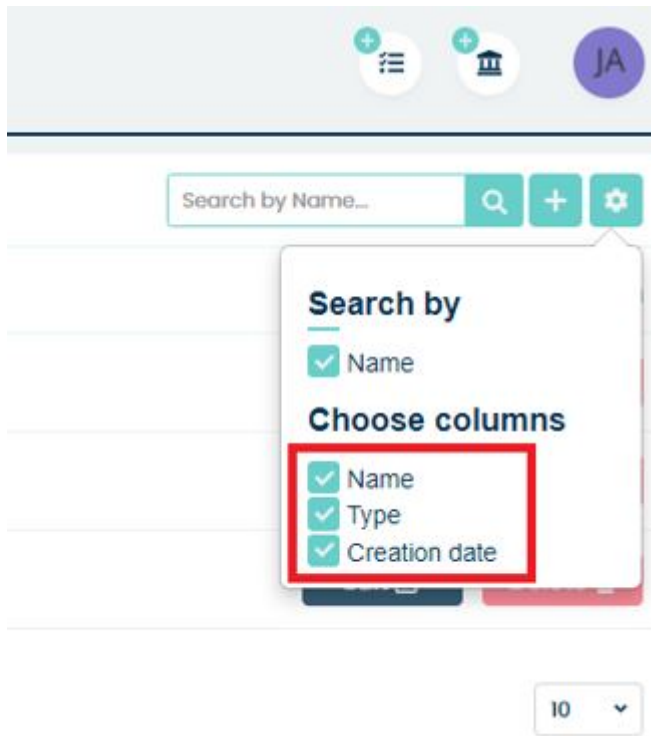
Also, you can look for a specific topic by using the section “Search” field. Whatever you type here will be searched for, depending on the things you marked in the ‘Search by’ section of the ‘Set column properties’ window.



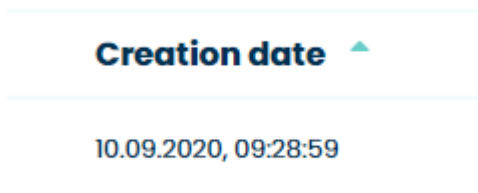
If you decide that you don’t need some of the attribute columns you can remove them from the view. To do that simply click on the  button.



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.



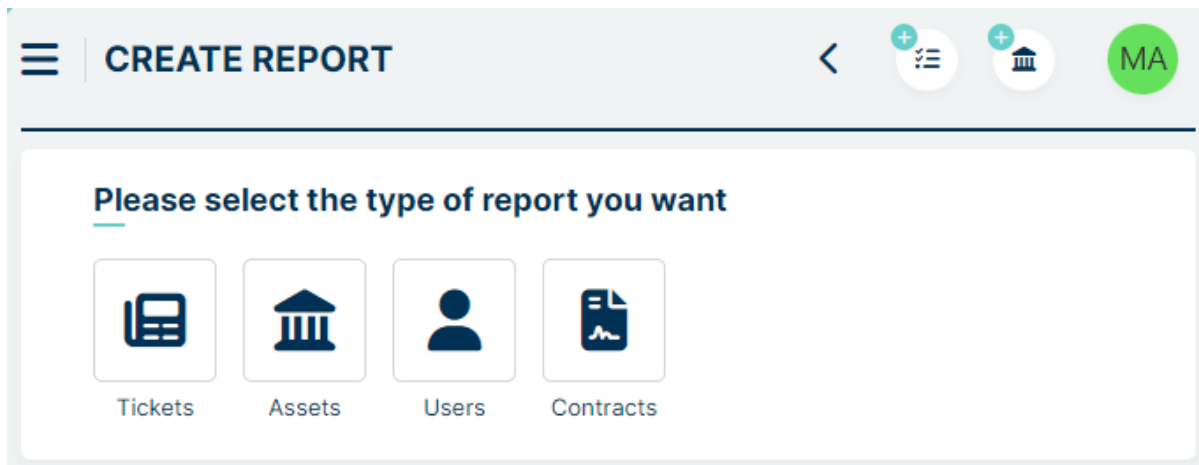
One last thing is that you can sort the list of available Reports by the date they were created. Just click on the 'Creation Date' column's name. You will notice a small icon next to it. It represents whether the list is sorted by date: ascending (▲) or descending (▼).



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



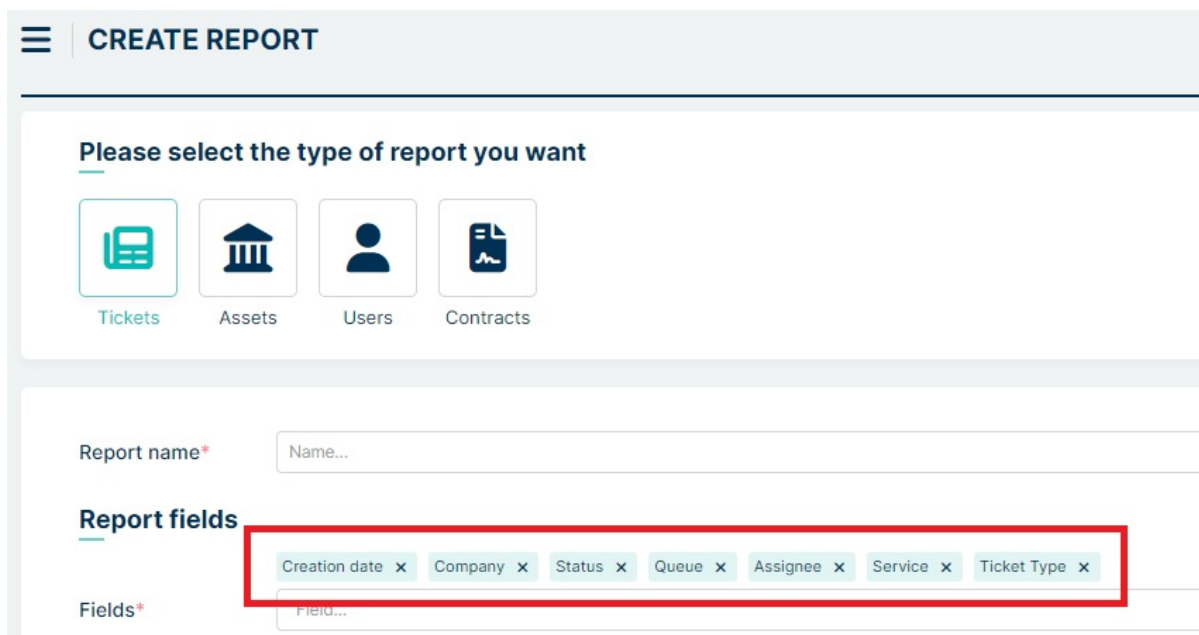
You will be moved to the new 'Create report' view.



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.

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”

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x

Fields* Field...

Can view

Type* Me only

Filters

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

Can view

Type* Visibility type...

Filters

Me only

All Customers and agents

All customers

All agents

Agent roles

Company customer roles

Creation date*

Company*

Status*

Right below them, you will also notice a set of filters.

Filters

Creation date* Period

Select period...

Company* Company...

Status* Status...

Queue* Queue...

Assignee* Assignee...

Service* Service...

Ticket Type* Ticket Type...

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.

Below the filters are 'Report groups'.

This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

They are used to group tickets or assets according to your preferences. Currently you can add up to five items.

Report groups

Id

Name

Ticket number

Queue

Company user

Example of a report using ‘Report groups’:

| | | | | | | |
|-------------------------------------|---------|--------|--------------|----------|---------|--------------|
| ^ Id: 7 | 1.11% | | | Count: 1 | | |
| ^ Name: "ticket2" | 100% | | | Count: 1 | | |
| ^ Ticket number: "DEV#202102260007" | 100% | | | Count: 1 | | |
| ^ Queue: Ticket queue | 100% | | | Count: 1 | | |
| ^ Company user: Jakub Customer | 100% | | | Count: 1 | | |
| Creation date | Company | Status | Queue | Assignee | Service | Ticket Type |
| 26.02.2021, 14:12:13 | Company | Open | Ticket queue | | Service | TicketType02 |
| | | | | | | |
| ^ Id: 8 | 1.11% | | | Count: 1 | | |
| ^ Name: "ticket3" | 100% | | | Count: 1 | | |
| ^ Ticket number: "DEV#202102260008" | 100% | | | Count: 1 | | |
| ^ Queue: Ticket queue | 100% | | | Count: 1 | | |
| ^ Company user: Jakub Customer | 100% | | | Count: 1 | | |
| Creation date | Company | Status | Queue | Assignee | Service | Ticket Type |
| 26.02.2021, 14:13:07 | Company | Open | Ticket queue | | Service | TicketType02 |
| | | | | | | |
| ^ Id: 9 | 1.11% | | | Count: 1 | | |
| ^ Name: "ticket04" | 100% | | | Count: 1 | | |
| ^ Ticket number: "DEV#202102260009" | 100% | | | Count: 1 | | |
| ^ Queue: Ticket queue | 100% | | | Count: 1 | | |
| ^ Company user: Jakub Customer | 100% | | | Count: 1 | | |

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

Report recipients

Add recipient

Add custom recipient

Add recipient

You can click on

Add recipient

 button and select from the list of saved recipients:


Report recipients

Company user

Email 

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

Report recipients

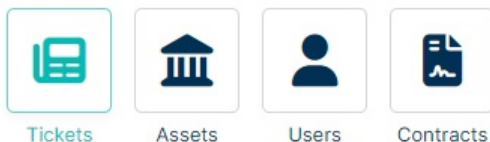
Email 

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'.

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.

Please select the type of report you want



Tickets



Assets



Users



Contracts

Report name*

Urgent tickets

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x

Fields*

Field...

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

Ticket Type x

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.

Report name*

Urgent tickets

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x

Fields*

Field...

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'.

Report name* Urgent tickets

Report fields

Fields*

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x

Field...

Can view

Type*

Filters

Creation date*

Company*

Status*

Queue*

Assignee*

Service*

Ticket Type*

Company user

Company

Status...

Queue...

Assignee...

Service...

Ticket Type...

Add filter

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

Report name* Urgent tickets

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x **Company user x**

Fields* Field...

Now let's add a filter for company users. Click on the **Add filter** located below the list of selected filters.

Report name* Urgent tickets

Report fields


Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x Company user x


Fields* Field...


Can view


Type* Me only


Filters

Period Select period... x 


Creation date* Company... x 

Status* Status... x 

Queue* Queue... x 

Assignee* Assignee... x 

Service* Service... x 

Ticket Type* Ticket Type... x 

Add filter

From the newly created 'Filter fields' list select 'Company user'.

Report name* Urgent tickets

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x Company user x

Fields* Field...

Can view

Type* Me only

Filters

Period Select period... x 

Creation date* Company... x 

Status* Status... x 

Queue* Subject x 

Assignee* Ticket number x 



Service* Last modification x 


Ticket Type* Global status x 

Company user x 

Priority

Filter fields* Filter field...  

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

Filter fields* Company user  

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

Filters

| | | | | |
|----------------|-----------------|------------------|---|----|
| Creation date* | Period | Select period... | x | 🗑️ |
| Company* | Company... | | x | 🗑️ |
| Status* | Status... | | x | 🗑️ |
| Queue* | Queue... | | x | 🗑️ |
| Assignee* | Assignee... | | x | 🗑️ |
| Service* | Service... | | x | 🗑️ |
| Company user* | Company user... | | x | 🗑️ |

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.

Report name* Urgent tickets

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x Company user x

Fields* Field...

Can view

Type* Me only

Filters

| | | | | |
|----------------|-----------------|-----------|---|----|
| Creation date* | Period | This week | x | 🗑️ |
| Company* | Company... | | x | 🗑️ |
| Status* | InProgress | x | | |
| Queue* | Mint Agent | x | | |
| Assignee* | Assignee... | | x | 🗑️ |
| Service* | Service... | | x | 🗑️ |
| Ticket Type* | Ticket Type... | | x | 🗑️ |
| Company user* | Mint Customer | x | | |
| | Company user... | | x | 🗑️ |

Add filter

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.

Assignee*

Mint Agent x

Assignee...

x

🗑️

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.

Report name*

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x Company user x

Fields*

Can view

Type*

Filters

Period x

Creation date* x

Company* x

Status* x

Queue* x

Assignee* x


Service* x

Ticket Type* x

Company user* x

x

x

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

Report name*

Report fields

Creation date x Company x Status x Queue x Assignee x Service x Ticket Type x Company user x

Fields*

Can view

Type*

Filters

Period x

Creation date* x

Status* x

Assignee* x


Company user* x

x

x

x

Report groups

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

| REPORT DEFINITIONS | | | | <input type="button" value="FE"/> <input type="button" value="MA"/> | |
|--------------------|----------------------------|---------|----------------------|---|---------------------------------------|
| # | Name | Type | Creation date | Action | |
| 1 | Assets from September 2020 | Assets | 10.09.2020, 09:28:59 | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |
| 2 | Urgent Tickets | Tickets | 24.09.2020, 12:15:59 | <input type="button" value="Edit"/> | <input type="button" value="Delete"/> |

Click on the 'Urgent Tickets' name.

You will see the exact information you were interested in.

REPORT

Filtered by
 Creation date: This week Status: InProgress Company user: Mint Customer Assignee: Mint Agent

Export Statistics only ☐

Please select fields to see

| Creation date | Company | Status | Company user | Queue | Assignee | Service |
|----------------------|-------------------|-------------|---------------|------------------|------------|------------------------------------|
| 22.09.2020, 11:18:35 | Mint Service Desk | In progress | MINT Customer | EU - support | Mint Agent | EU Support - problems/malfunctions |
| 22.09.2020, 13:10:26 | Mint Service Desk | In progress | MINT Customer | Poland - support | Mint Agent | PL support - problems/malfunctions |

Navigation: << < 1 > >> 5

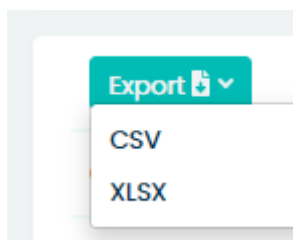
Now you can export your report to the external file. You can select either .CSV or .XLSX format. Click the **Export** button.

Export Statistics only ☐

| Creation date | Company | Status | Company user |
|----------------------|-------------------|-------------|---------------|
| 22.09.2020, 11:18:35 | Mint Service Desk | In progress | MINT Customer |
| 22.09.2020, 13:10:26 | Mint Service Desk | In progress | MINT Customer |

Navigation: << < 1 > >>

Now click on one of the available file formats.



It will open your system's file explorer where you need to choose a place where you want to save your report. Click 'Save'. Now you can open the file with your favorite software for example Microsoft Excel.

Let's go back to the Report's list.

REPORT DEFINITIONS

Search by Name...

| # | Name | Type | Creation date | Action |
|---|----------------------------|---------|----------------------|--------|
| 1 | Assets from September 2020 | Assets | 10.09.2020, 09:28:59 | |
| 2 | Urgent Tickets | Tickets | 24.09.2020, 12:15:59 | |

Navigation: << < 1 > >> 10

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

Would you like to delete this report?

Yes

No

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

Report name*

Name...

Report fields

Creation date x

Company x

Status x

Queue x

Assignee x

Service x

Ticket Type x

Fields*

Field...

Filters

Total reported time

Custom fields

Creation date*

Real Number

Company*

Int

Status*

Date

Queue*

Age

Queue*

Queue...

x

Assignee*

Assignee...

x

Service*

Service...

x

Ticket Type*

Ticket Type...

x

Add filter

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

Report name*

Name...

Report fields

Creation date x

Company x

Status x

Queue x

Assignee x

Service x

Ticket Type x

Fields*

Field...

Filters

Total reported time

Custom fields

Creation date*

Real Number

Company*

Int

Status*

Date

Queue*

Age

Queue*

Queue...

x

Assignee*

Assignee...

x

Service*

Service...

x

Ticket Type*

Ticket Type...

x

Add filter

The same thing happens when Custom field is selected.

4.4.13 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):

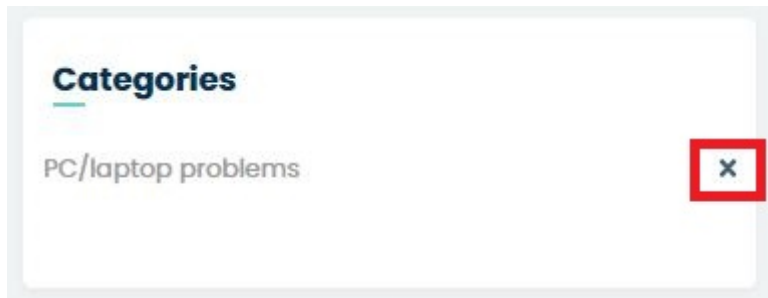
- Customer/Agent can find help while creating the Ticket ('Create new ticket'),
- Agent can also find help in the 'Ticket Details' the moment he enters the Ticket.


The default view shows the list of all available topics.

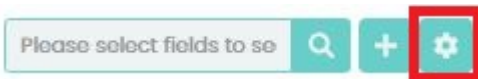
On the left side, you can see available categories.

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.

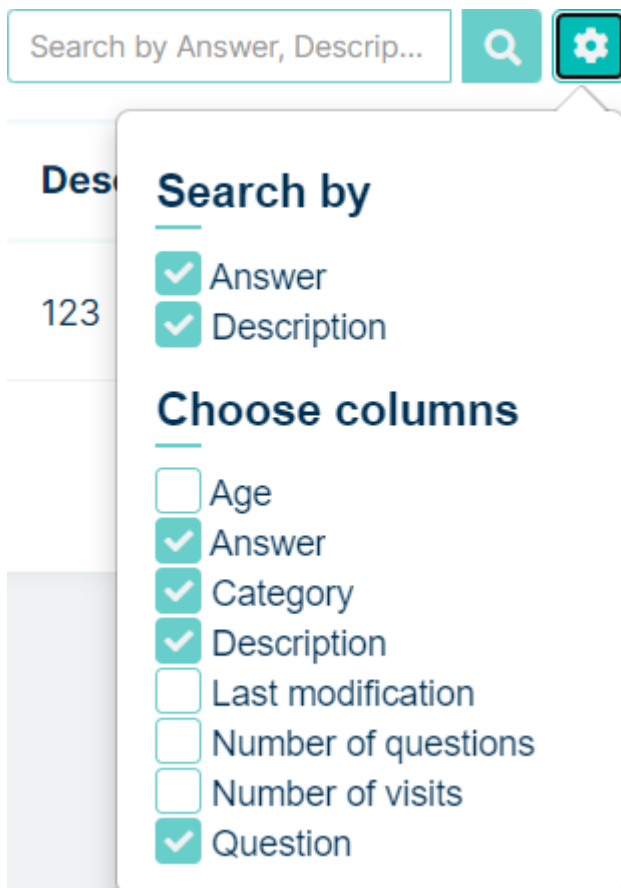
You can also click on the X button located on the right side of the currently selected category/sub-category. Each time you do it you will be moved one level above in the category structure.



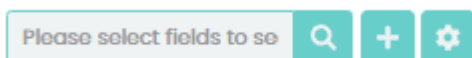
By default, in the main view of the Knowledge Base section, you will see the list topics with the following attribute columns: Category, Question, and Action. In order to see more information, you need to click the  button.



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.

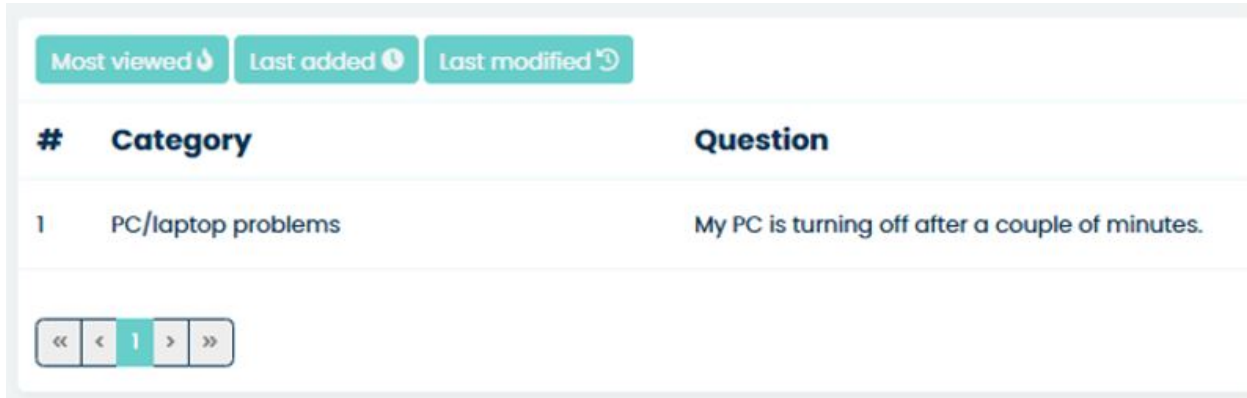


Also, you can look for a specific topic by using the "Search" field. Whatever you type here will be searched for, depending on the things you marked in the 'Search by' section of the 'Set column properties' window.



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

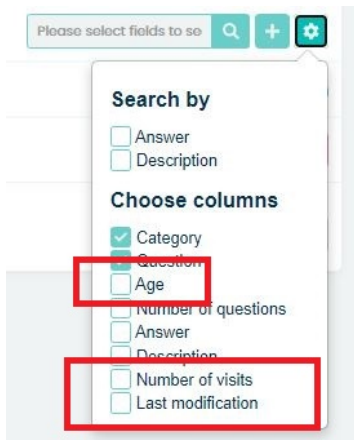
- 'Most viewed'
- 'Last added'
- 'Last modified'



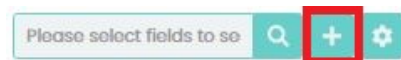
They are used for sorting the list by:

- **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.

The screenshot shows the 'CREATE KNOWLEDGE BASE ENTRY' interface. It features a sidebar with a menu icon and the title 'CREATE KNOWLEDGE BASE ENTRY'. The main form area contains several input fields: 'Title' (text), 'Category' (dropdown), 'Companies' (text), 'Share with everyone' (checkbox), 'Questions' (text with a rich text editor toolbar), 'Answer' (text), 'Attachments' (with a 'Click to attach file' button), and 'Description' (text). The top right corner of the form has navigation icons and a user profile icon labeled 'JA'.

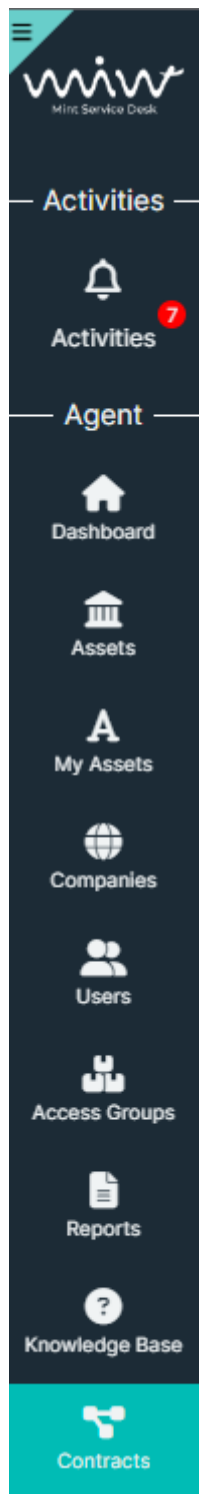
Once you do the steps mentioned above you can save your new topic by clicking on the  button located in the right bottom corner of the view. After that you will see that a new position appeared on the list.

4.4.14 CONTRACTS

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

Add role

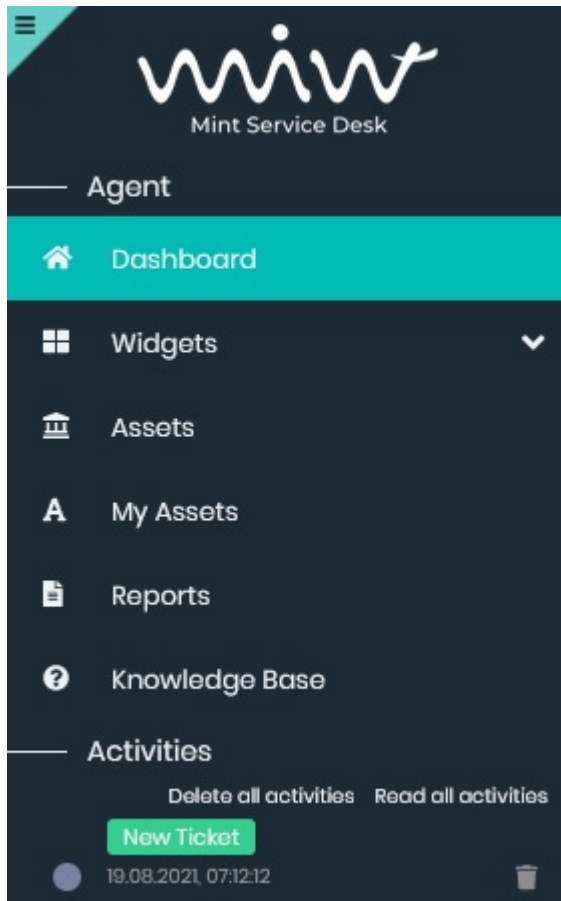
| | |
|----------------------------------|---|
| Role name* | <input type="text" value="Service Desk Agent"/> |
| Description | <input type="text" value="Description"/> |
| Change user assigned to ticket ⓘ | <input checked="" type="checkbox"/> |
| Edit company user details ⓘ | <input checked="" type="checkbox"/> |
| Edit company ⓘ | <input checked="" type="checkbox"/> |
| Edit asset user ⓘ | <input checked="" type="checkbox"/> |
| Edit asset company ⓘ | <input checked="" type="checkbox"/> |
| Edit asset categories ⓘ | <input checked="" type="checkbox"/> |
| Edit asset agents ⓘ | <input checked="" type="checkbox"/> |
| Report creator ⓘ | <input checked="" type="checkbox"/> |
| Remove ticket ⓘ | <input checked="" type="checkbox"/> |
| Assign company user to company ⓘ | <input checked="" type="checkbox"/> |
| Manage companies ⓘ | <input checked="" type="checkbox"/> |
| Manage users ⓘ | <input checked="" type="checkbox"/> |
| Work time coordinator ⓘ | <input checked="" type="checkbox"/> |
| Manage contracts ⓘ | <input checked="" type="checkbox"/> |




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

4.4.15 ACTIVITIES

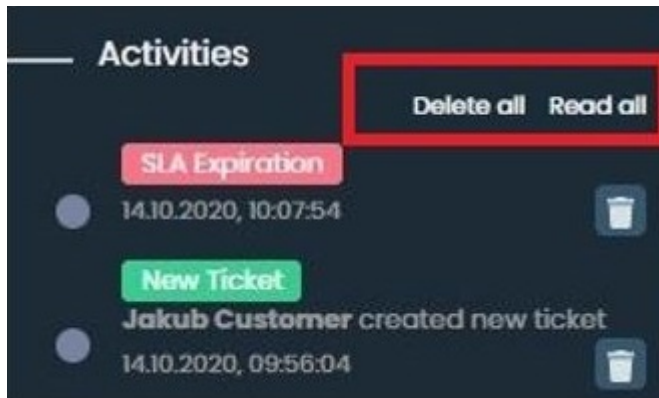
Just like with the Client account, on the left side, in the lower part of the sidebar menu, you will find the Activities section.



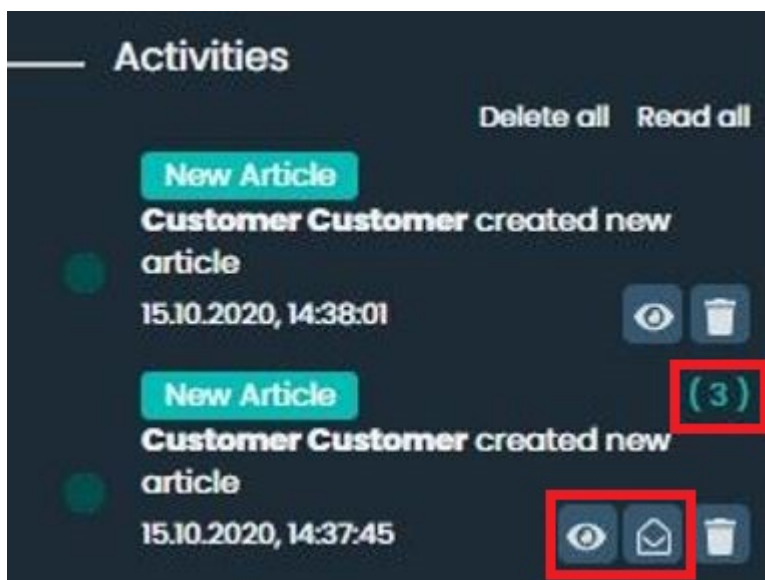
It will display the tickets with any new activity, so you could easily see what is new and go directly to the action. You will see a blinking position on the list each time a new change, like a new message (Article) from the Customer, has been made. The notifications are customizable (color, title, content,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

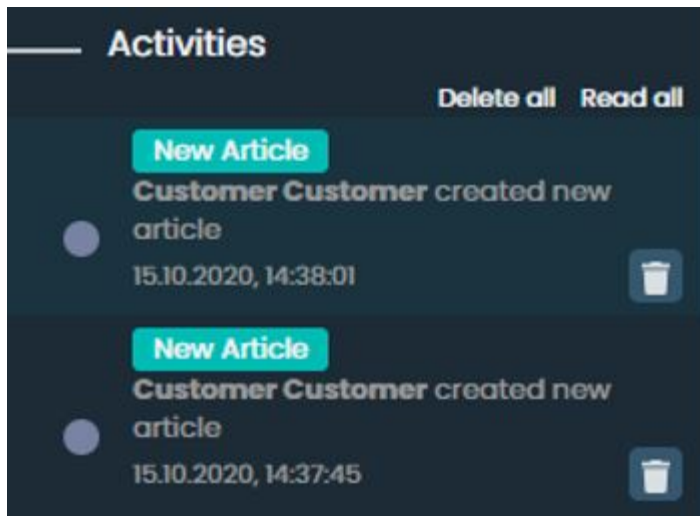


Also if you have a couple of unchecked notifications within one ticket, for example, a couple of unread messages from the Customer, you will notice a number presented on the right side inside the notification.



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.

See more activities

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 not 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.

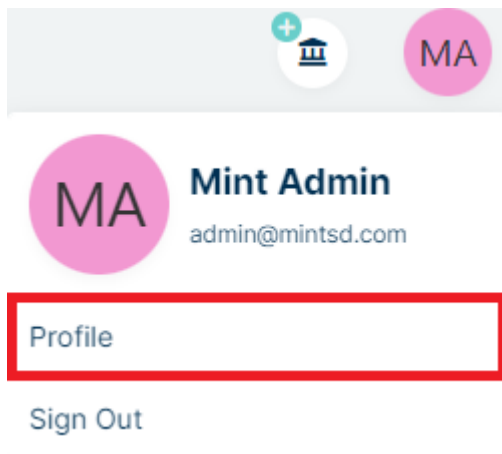
Your access rights has been changed. You are not authorized to view this page.

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.


AS always it is not possible to change the "Login", but the **Administrator user is the only user who can change the 'Email'**.

USER PROFILE

Your profile is 80% complete 80%

Basic information

Picture 

Mobile app configuration 

Login

Email*

Personal details

First name*

Second name

Last name*

Phone number

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 possible. There is also a tip about password policy according to Password Policy configuration in Admin > Settings > User.

Password change

Current password

New password

Confirm new password

Password must:

- Be at least 6 characters long
- Contain lower case letter
- Contain digit

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.

User Settings

Language

Contact

Skype

Phone

Location

Location

Additional info

Availability -

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.

The screenshot displays the MintSD Dashboard interface. At the top, there's a header with a hamburger menu, the word 'DASHBOARD', and user avatars. The main content area is divided into three columns:

- Configure your Service Desk:** A section with a progress indicator (97%) and a list of tasks. The tasks are:

| Task | Implementation progress |
|--|-------------------------------------|
| Change your Administrator password. | <input type="checkbox"/> |
| Add a new email account to the system. | <input checked="" type="checkbox"/> |
| Setup an email template confirming the account creation. | <input checked="" type="checkbox"/> |
| Create Agent accounts. | <input checked="" type="checkbox"/> |
| Add companies which you support. | <input checked="" type="checkbox"/> |
| Create Company users accounts. | <input checked="" type="checkbox"/> |
| Define roles for Agents. | <input checked="" type="checkbox"/> |
| Creating a Support Queue structure. | <input checked="" type="checkbox"/> |
| Create ticket types. | <input checked="" type="checkbox"/> |
| Create asset category structure. | <input checked="" type="checkbox"/> |
- Tweets by @desk_mint:** A section showing two tweets from the account @desk_mint. The first tweet is about World Animal Day and features a video of penguins. The second tweet is about the integration between @Lansweeper and @desk_mint and features a video of a network diagram.
- Online Agents:** A section titled 'Online Company users' showing two active agents: 'Mint Agent' (jakub-agnot_123@gmail.com) and 'Jakub Test' (jkoper-test@gmail.com).

At the bottom right, there's a 'Latest Updates' section showing counts for Agents (19), Tickets (11628), and Assets (106).

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 be 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.

USER MANAGEMENT

MA

Agents

Administrators

Company users

Unassigned

Search by email, first name

| # | Login | Email | First name | Last name | Last login | Action | | |
|----|------------------|-----------------------------------|------------|-----------|----------------------|------------|------|------|
| 1 | agent | wojtek2200@onet.pl | Mint | Agent | 30.03.2022, 15:18:50 | Deactivate | Role | Edit |
| 2 | agent0 | ananimowyaygnalstamint@interia.pl | Agent | Tomek | 29.03.2022, 15:16:50 | Deactivate | Role | Edit |
| 3 | agent2 | rodnieba@gmail.com | Alek | Stolik | 28.02.2022, 04:50:18 | Deactivate | Role | Edit |
| 4 | agentmati | matouszagent@opgg.pl | Matousz | AgentLOPK | 3.02.2022, 14:49:39 | Deactivate | Role | Edit |
| 5 | anastasiya_agent | anastasiya_agent@gmail.com | Nastya | Agent | 28.01.2022, 14:09:51 | Deactivate | Role | Edit |
| 6 | jkapar-agent | jakub-agnat_123@gmail.com | Mint | Agent | 17.03.2022, 15:31:00 | Deactivate | Role | Edit |
| 7 | konto01 | konto04@gmail.com | komo | konto | 30.03.2022, 17:30:28 | Deactivate | Role | Edit |
| 8 | mtomaka | mtomaka@opggsoftware.com | Michael | Tomahawk | 31.03.2022, 14:32:17 | Deactivate | Role | Edit |
| 9 | test1 | tznajden@opggsoftware.com | Agent | Tomek Two | 15.03.2022, 12:29:00 | Deactivate | Role | Edit |
| 10 | test222 | konj@gmail.com | Tokank | Tokank | 15.02.2022, 10:04:23 | Deactivate | Role | Edit |

1

2

Total elements: 15

10

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).

CREATE USER

Login *

Email *

First name *

Last name *

Role *

Password *

Password must:

- Be at least 6 characters long
- Contain lower case letter
- Contain digit

Confirm password *

* - fields required

[Create](#)

With every user, you can do a couple of things. One of them is that you can Activate/Deactivate the user. Deactivating means that the user account will be locked, and he will not be able to log in.



You can also change the user Role. Just click the **Role** button 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.

Role management

COMPANY USERS AGENTS ADMINISTRATORS

☒ Service Desk Agent

[Cancel](#) [Save](#)

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'.

Role management

COMPANY USERS

AGENTS

ADMINISTRATORS

Company
Mint Service Desk

☒ Customer

Cancel Save

In this place, you need to choose and select one of the available Companies and one of its roles and click **Save**. 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 **Edit** button. It will direct you to the 'Edit user' screen containing information about the user you just choose.

EDIT USER

Basic information

Picture

agent

agent@mintsd.com

Mobile app configuration

Personal details

First name*

Mint

Second name

Second name...

Last name*

Agent

Phone number

Phone number...

Anonymize user's personal data

Password and notifications change

New password

Confirm new password

Password must:

- Be at least 6 characters long
- Contain lower case letter
- Contain digit

Manage user notifications

User Settings

Language

English (GB)

Now, make any changes you like and click the **Save** button.

User anonymization

From this place you can also anonymize user data (if admin set this in "Settings" => "Users" section). Anonymization 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

Are you sure you want to anonymize this user's personal data?

Yes

No

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

EDIT USER

Basic information

Picture

Mobile app configuration

QR code

Login

Email

Personal details

First name

Second name

Last name

Phone number

Password and notifications change

New password

Confirm new password

Manage user notifications

Password must:

- Be at least 6 characters long
- Contain lower case letter
- Contain digit

5.3.2 ROLES

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

ROLES


Export roles

Search by Role

Table with 15 columns: #, Role, Description, Change us..., Edit comp..., Edit comp..., Edit asset ..., Edit asset ..., Edit asset ..., Edit asset ..., Report cre..., Remove ti..., Assign co..., Manage c..., Manage u..., Action

Table with 2 rows of role data

Navigation: Total elements: 2

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.

Add role

| | |
|----------------------------------|---|
| Role name* | <input type="text" value="Service Desk Agent"/> |
| Description | <input type="text" value="Description"/> |
| Change user assigned to ticket ⓘ | <input type="checkbox"/> |
| Edit company user details ⓘ | <input type="checkbox"/> |
| Edit company ⓘ | <input type="checkbox"/> |
| Edit asset user ⓘ | <input type="checkbox"/> |
| Edit asset company ⓘ | <input type="checkbox"/> |
| Edit asset categories ⓘ | <input type="checkbox"/> |
| Edit asset agents ⓘ | <input type="checkbox"/> |
| Report creator ⓘ | <input type="checkbox"/> |
| Remove ticket ⓘ | <input type="checkbox"/> |
| Assign company user to company ⓘ | <input type="checkbox"/> |
| Manage companies ⓘ | <input type="checkbox"/> |
| Manage users ⓘ | <input type="checkbox"/> |
| Work time coordinator ⓘ | <input type="checkbox"/> |
| Manage contracts ⓘ | <input type="checkbox"/> |


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.

- **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 changing of company assigned to asset.
- **Edit asset categories** – Allows changing of categories assigned to asset.
- **Edit asset agents** – Allows changing 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.

Once you finish click  button.

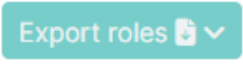
If you like to add/change anything later for the role, you can use the  button.

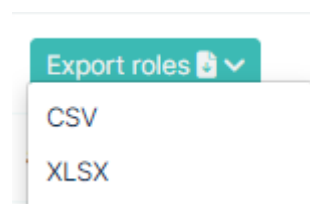
If you want to get rid of any Agent role on the list just click  and confirm your choice by clicking YES on the confirmation screen. You will also be informed that role will **only** be deleted if it is not used in the system.

Would you like to delete this role?

The role will be deleted only 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

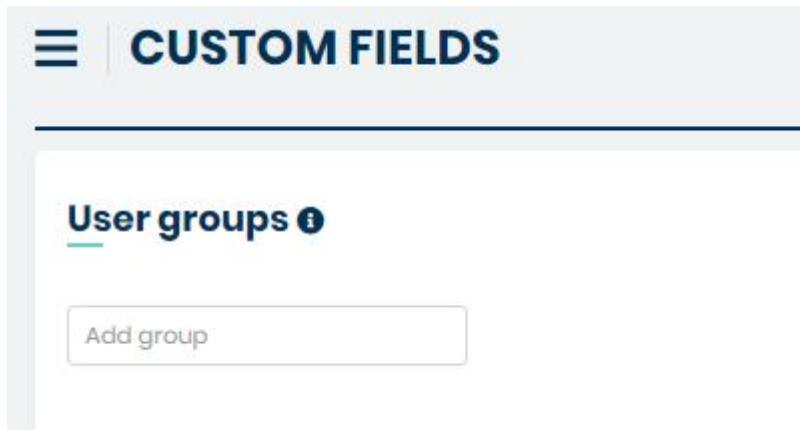
In this section, you will be managing the additional fields that might contain additional information for every type of user.

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.

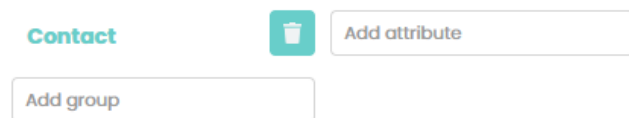
If you click on the round icon (or round picture if you have uploaded one in your profile) it will open a dropdown menu. Click on 'Profile'.

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.

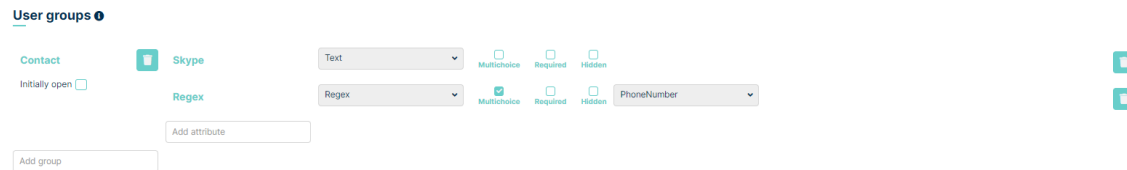
Let us create some. First, you need to create a group for those attributes. Click on the 'Add group' field and type some name.



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.

CUSTOM FIELDS

User groups

ContactInitially open

SkypeTextMultichoiceRequiredHiddenAdd attribute

RegexRegexMultichoiceRequiredHiddenPhoneNumber

LocationInitially open

LocationGeolocationMultichoiceRequiredHiddenAdd attribute

Additional infoInitially open

AvailabilityNum ScopeMultichoiceRequiredHiddenAdd attribute

Add groupSave

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

User Settings

Language

English (GB)

▼

Theme

Default

▼

Contact

Skype

New value...

Phone

New value...

Location

Address

Address...

Longitude

Longitude...

Latitude


Latitude...

Additional info

Availability

New value...

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.

EXTERNAL INTEGRATIONS

MA

| # | Name | Definition name | Definition type | Action |
|---|-------------|-----------------|-----------------|---|
| 1 | Azure | Azure AD | Azure AD | <button>Edit</button> <button>Delete</button> |
| 2 | GD Azure AD | Azure AD | Azure AD | <button>Edit</button> <button>Delete</button> |
| 3 | LDAP | LDAP | LDAP | <button>Edit</button> <button>Delete</button> |

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3

Total elements: 3

10

>

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 **Update** button. When the page reloads, press the **Connect** button. If the configuration is correct, an appropriate message will be displayed. The next step is to press the **Start synchronization** button. After refreshing the page, a new entry will appear in Synchronizations.

| # | Date | Synchronization result | Error message |
|---|---------------------|------------------------|---------------|
| 1 | 10.11.2021 16:14:14 | in progress | |

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.

[illegible]

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.

ACCESS GROUPS

MA

All groups

Search by Description, Na...

| # | Name | Type | Subtype | Description | Action |
|---|-------------------|---------|------------|--------------------------------|-----------------------------------|
| 1 | *Unassigned | Group | No company | Default group unassigned users | |
| 2 | Mint Agent | User | | | |
| 3 | Mint Service Desk | Company | | Sample company | |
| 4 | My Group | Group | | Description of my group | <div>Delete</div> <div>Edit</div> |

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Total elements: 4

10

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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:

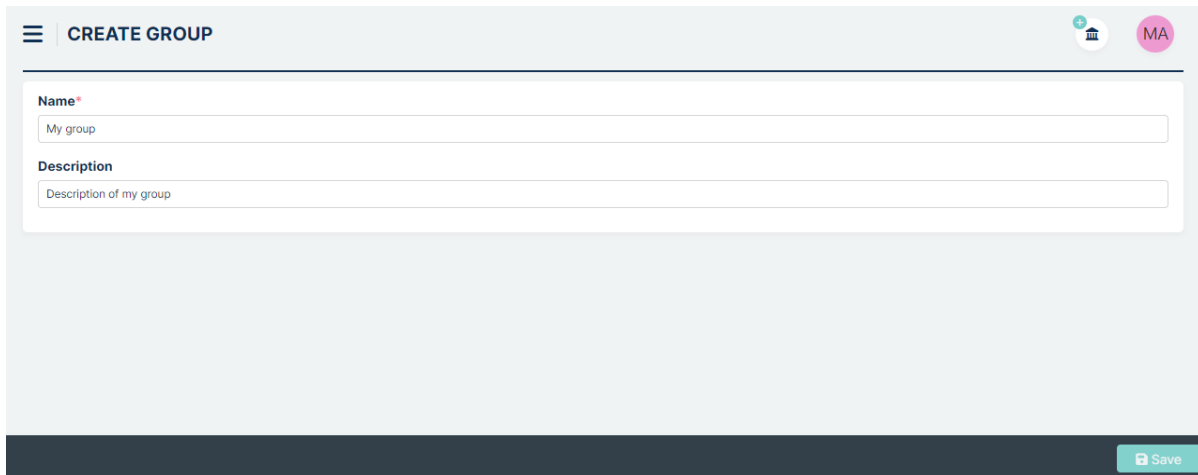
- Unassigned user group - this is the default group for tickets that do not have a company assigned to them
- User - for each agent, its access group is automatically created here
- Company - for each company, its access group is automatically created here

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.

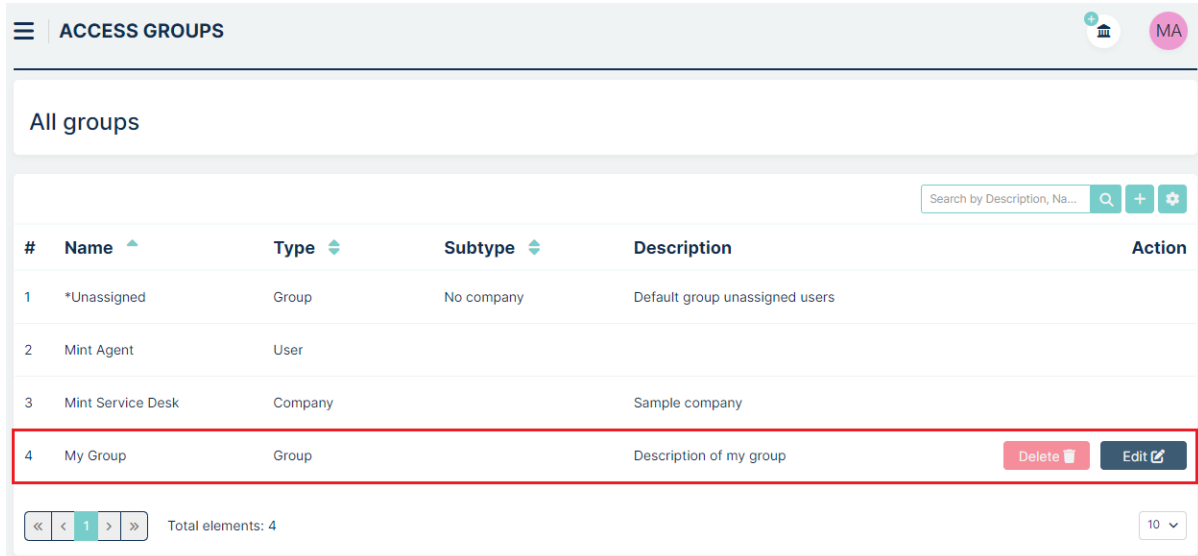
We can both include and exclude each group to another, however we cannot assign other groups to Company and Unassigned user group. You can also assign one agent group to another.

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 at least the “Name” field and press . New group will appear on the list

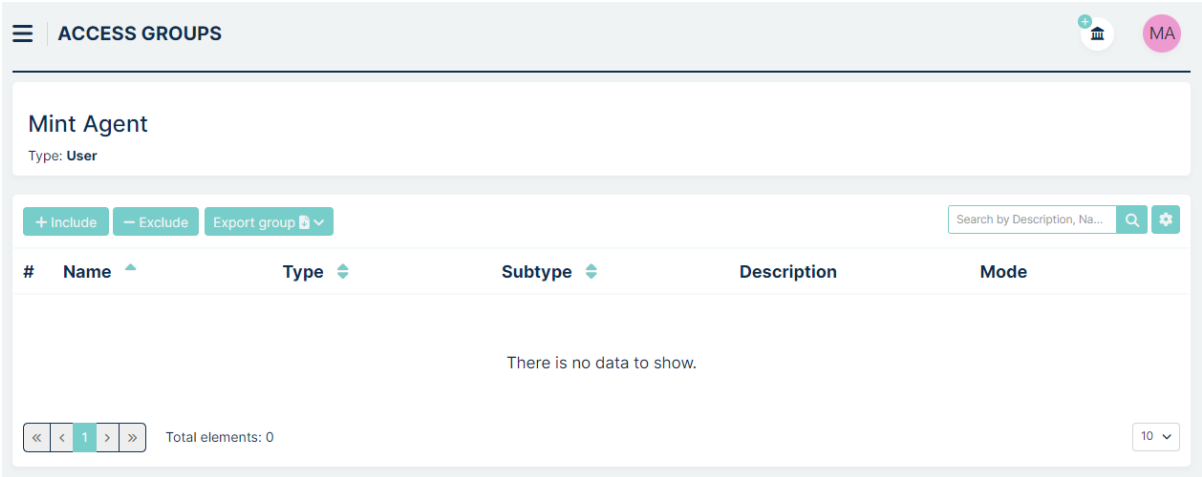




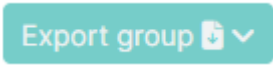

| # | Name | Type | Subtype | Description | Action |
|---|-------------------|---------|------------|--------------------------------|-----------------------------------|
| 1 | *Unassigned | Group | No company | Default group unassigned users | |
| 2 | Mint Agent | User | | | |
| 3 | Mint Service Desk | Company | | Sample company | |
| 4 | My Group | Group | | Description of my group | <div>Delete</div> <div>Edit</div> |

We can  name of this group and  it.

Group view

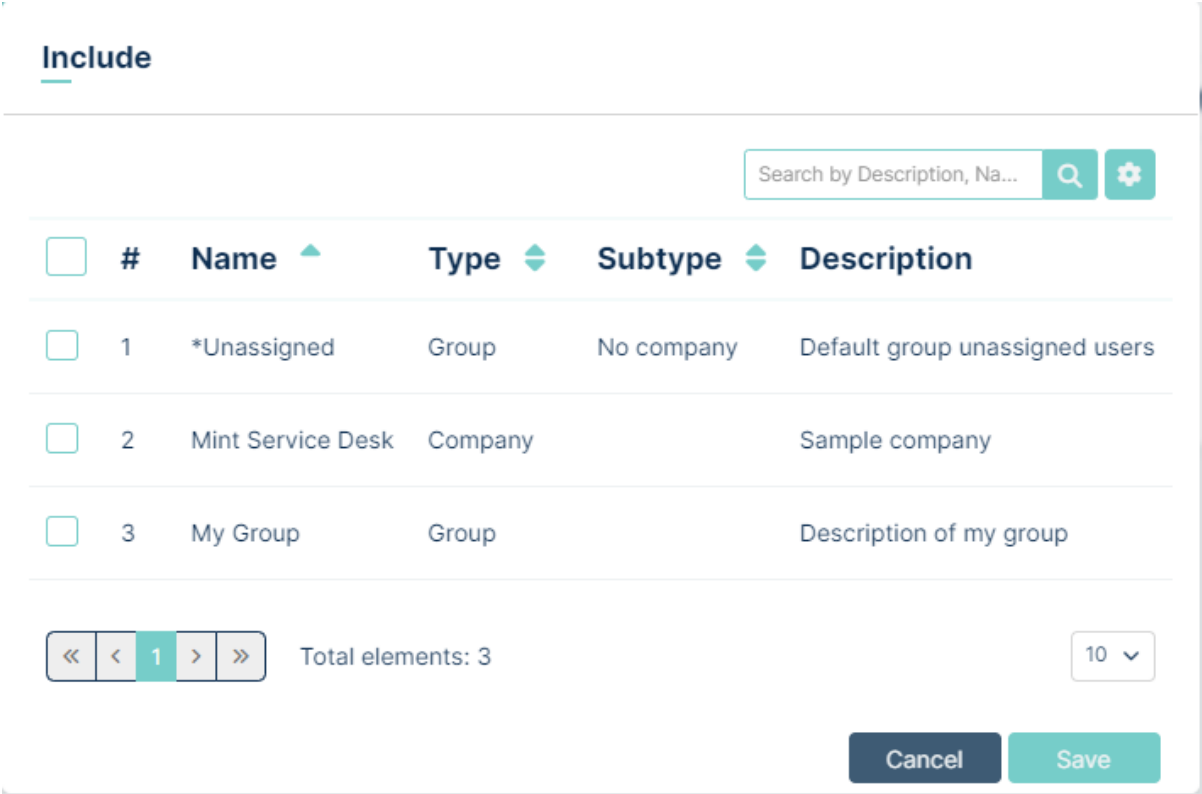
Let’s describe some more here. Enter the group (for example Mint Agent) by clicking on it




You see new window with ,  and  buttons located in upper left side. In the centre you see a table with columns, 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 . Groups will appear in table.

ACCESS GROUPS

MA

Mint Agent

Type: User

+ Include

- Exclude

Export group

Search by Description, Na...

| # | Name | Type | Subtype | Description | Mode |
|---|-------------------|---------|---------|----------------|---------|
| 1 | Mint Service Desk | Company | | Sample company | Include |

<<

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Total elements: 1


10

To remove group from table, press the  again, uncheck selected groups you want and press .

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.

Exclude

Search by Description, Na...

| <input type="checkbox"/> | # | Name | Type | Subtype | Description |
|--------------------------|---|-------------------|---------|------------|--------------------------------|
| <input type="checkbox"/> | 1 | *Unassigned | Group | No company | Default group unassigned users |
| <input type="checkbox"/> | 2 | Mint Service Desk | Company | | Sample company |
| <input type="checkbox"/> | 3 | My Group | Group | | Description of my group |

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Total elements: 3



10

Cancel

Save




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



 ACCESS GROUPS







Mint Agent

Type: User


  



Search by Description, Na...  

| # | Name | Type | Subtype | Description | Mode |
|---|-------------------|---------|---------|----------------|---------|
| 1 | Mint Service Desk | Company | | Sample company | Exclude |

  1  

Total elements: 1

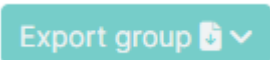
10 


To remove group from table, press the  again, uncheck selected groups 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

Export group 

CSV

XLSX

5.5 COMPANIES

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

5.5.1 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.

| # | Name | Description | VAT-ID | Action |
|---|-------------------|--|----------------|----------------------|
| 1 | Mint Service Desk | Home of the makers of the Mint system. | 1234-1234-1234 | Edit |

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

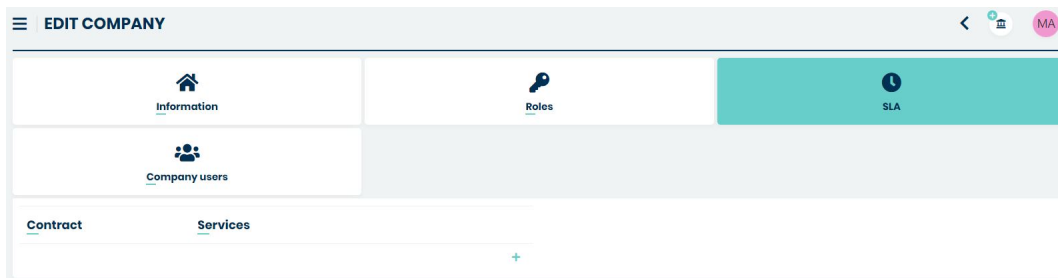
The first one is that you can create a company 'Role'.

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.

SLA Details

SLA name*



EU support - problems/malfunctions

EU support - problems/malfunctions

EU support SLA - questions

PL Support SLA - problems/malfunctions

PL support - problems/malfunctions

PL support SLA - questions


Select one that is available and click

Save


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.

Contract Details


Contract name*




Save

Just click the  button and a form for creating new SLA will be loaded.

Contract Details

Contract name*


Services


Contract Types*

Priorities

☐ Name

☐ High

☐ Medium

☐ Low

Parameters

Parameters









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.



EDIT COMPANY





Information
Roles
SLA

Company users

Search by Login, Email, FL




| # | Login | Email | First name | Last name | Action |
|---|----------|---------------------|------------|-----------|---|
| 1 | customer | customer@mintsd.com | Customer | Customer |    |


Total elements: 1


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 be able to log in.



If you want to change the user role click the **Role** 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'.

Role management

 The 'Role management' window has three tabs: 'COMPANY USERS' (active, teal), 'AGENTS' (disabled, grey), and 'ADMINISTRATORS' (disabled, grey). Below the tabs is a 'Company' dropdown menu with 'Mint Service Desk' selected. Underneath, there is a checked checkbox for 'Customer'. At the bottom right are 'Cancel' and 'Save' buttons.

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 once you have unselected 'Customer' the Agent tab became available.

Role management

 The 'Role management' window now has 'AGENTS' (active, teal) as the selected tab. The 'COMPANY USERS' and 'ADMINISTRATORS' tabs are disabled. The 'Company' dropdown is still 'Mint Service Desk'. Below it, the 'Customer' checkbox is now unchecked, and a new checkbox for 'Service Desk Agent' is visible. At the bottom right are 'Cancel' and 'Save' buttons.

In this place, you need to choose and select one of the available Companies and their roles and click the **Save** button. Once you do that the user will disappear from the 'Customers' tab and be moved under the 'Agents'.

5.5.2 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'.

Contact

Add attribute


Add group

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.


Company groups

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.

5.5.3 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.

| # | Login | Email | First name | Last name | Action |
|----|----------------------------|------------------------------|---------------|--------------|----------------------|
| 1 | 123@wp.pl | 123@wp.pl | | | Activate Role Edit |
| 2 | MAILER-DAEMON@smtp.tlen.pl | MAILER-DAEMON@smtp.tlen.pl | MAILER-DAEMON | Unknown | Deactivate Role Edit |
| 3 | TestCustomer | test@mail.com | Test | Customer | Deactivate Role Edit |
| 4 | customer | customer@mintsd.com | Customer | Customer | Deactivate Role Edit |
| 5 | d-customer | customerdzewczyk@gmail.com | Dawid | Customer | Deactivate Role Edit |
| 6 | erykcustomer | erykcustomer@wp.pl | Eryk | Customer | Deactivate Role Edit |
| 7 | fff@asd | fff@asd | fff | Illl | Deactivate Role Edit |
| 8 | jkopar-customer | ... | MINT | Customer | Deactivate Role Edit |
| 9 | no-reply | no-reply@accounts.google.com | Google | Unknown | Deactivate Role Edit |
| 10 | rcustomermat | rcustomermat@rcustomermat.pl | rcustomermat | rcustomermat | Deactivate Role Edit |

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).

CREATE USER

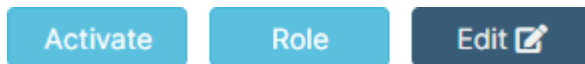
Login *
 Email *
 First name *
 Last name *
 Role *
 Password *
 Password must:

- Be at least 6 characters long
- Contain lower case letter
- Contain digit

 Confirm password *
 * - fields required

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 be able to log in.





You can also change the user Role. Just click the **Role** button and in the next window change the role for the desired one.

Role management

COMPANY USERS AGENTS ADMINISTRATORS

Company
Mint Service Desk

☒ Customer

Cancel Save

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.

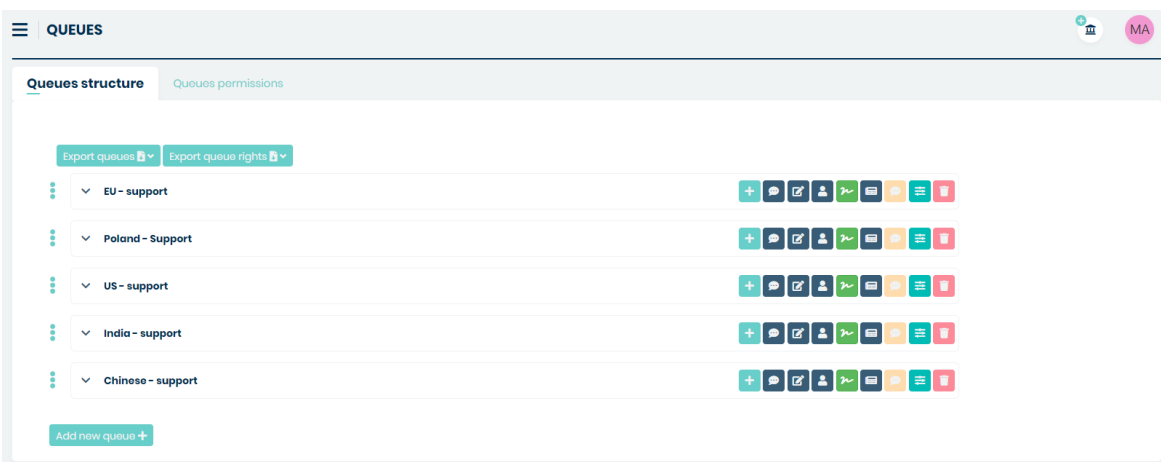
Once you change the role and click **Save** the user account will be moved to a different tab (in the 'Company users view'), depending on your choice.

One last thing worth mentioning is that when you save the account without any role chosen, it will be moved to the 'Unassigned' tab.

5.6 TICKETS

5.6.1 QUEUES AND PERMISSIONS

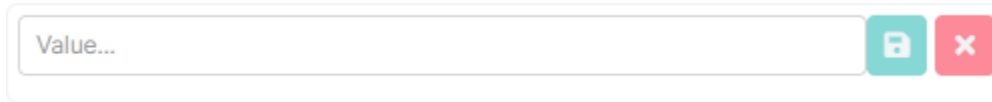
The queues in **MINT Service Desk** are “containers” of tickets. You can define your queues based on resolution teams, departments, logical units, processes, and workflow interaction teams. In order to define your queue structure and have it configured you will have to use functions available in the “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.




A screenshot of a form with a text input field containing the placeholder text 'Value...'. To the right of the input field are two buttons: a teal button with a lock icon and a red button with an 'X' icon.


Now, you only need to type the right name for this queue and either hit 'enter' on your keyboard or click on the  button.

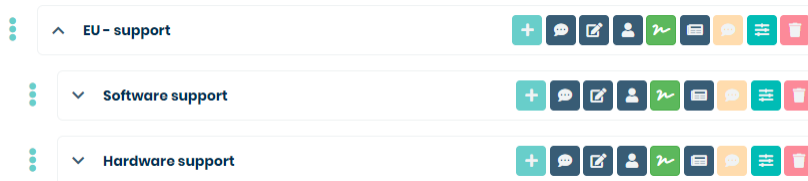
Once a new queue has been created, you can do several things with it.





A screenshot of a toolbar for a queue named 'EU - support'. The toolbar includes a dropdown arrow, a plus icon, a speech bubble icon, a document icon, a person icon, a refresh icon, a mail icon, a chat icon, a list icon, and a trash icon.


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.

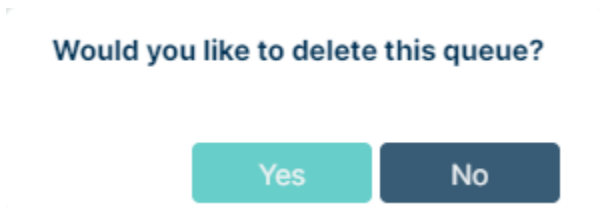
Each queue that also has sub-queues will be displayed by default with those sub-queues hidden. In order to see them, you must expand the queue by clicking on  button. Then you will see the queue along with its sub-queues just like on the following screen.




A screenshot showing an expanded queue structure. The 'EU - support' queue is expanded, showing two sub-queues: 'Software support' and 'Hardware support'. Each sub-queue has its own set of management icons (plus, speech bubble, document, person, refresh, mail, chat, list, trash).


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'.





A screenshot of a confirmation dialog box with the text 'Would you like to delete this queue?'. Below the text are two buttons: a teal 'Yes' button and a dark blue 'No' button.

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  **Create new parameters**, fill in the required fields (Parameters name, Calendar, Response time, Resolution time) and any other if you want, then click on the  button.

☒ **Create new parameters**

Create new parameters

Parameters name*

Description

Calendar*

#1 Escalation times

Ticket types

Priorities

Reset update time after agent response ☐

Reset time after ticket reopen ☐

Response time % min


Update time % min




Workaround time % min

Resolution time % min



Force escalation

% Maximum number of uses



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.

Setup autoreponse for queue

☐ Inherited

Ticket created

Choose autoreponse template...

Ticket closed


Choose autoreponse template...

Cancel

Delete

Save

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.

Setup default agent for queue

Mint Agent




☒ Created new ticket 

☒ Queue changed 

Cancel

Save

From the drop-down list, you can select the default agent. Now you can 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'.

To configure the default signature, press the  button. After pressing this button, a modal will be displayed with the signature selection.

Select signatures:

Preview

Select default signatures



Queue signatures


Select signatures

Cancel


Save

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

Value...

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.

The screenshot shows the 'QUEUES' section with the 'Queues permissions' tab selected. At the top, there are two dropdown menus: 'User roles' (set to 'Service Desk Agent') and 'Service Desk Agent'. Below these, there is a list of queues with their permissions:

| Queue | Read | Update | Create |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| EU - support | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Poland - support | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| US - support | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| India - support | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

The screenshot shows the 'Agent roles' dropdown menu with 'Service Desk Agent' selected.

Now we can change the rights by selecting some check-boxes located on the right side of each queue.

The screenshot shows the 'EU - support' queue with the following permissions:


| Queue | Read | Update | Create |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|
| EU - support | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

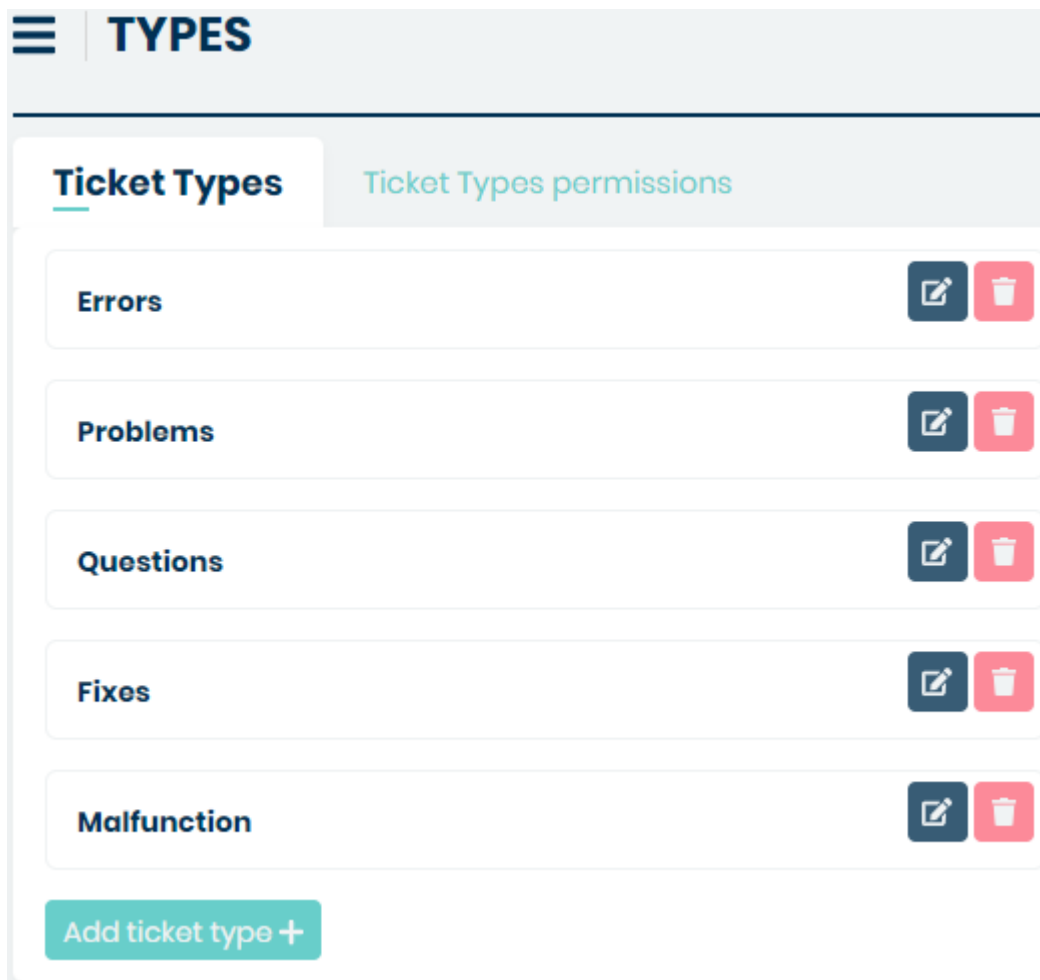
In this section, you can configure the whole structure for Tickets. Step by step you can create, edit or delete: 'Ticket types', 'Groups' (of attributes), as well as single 'Attributes' along with their values. You will also set custom Statuses for your Ticket Types and unique Ticket number pattern.

5.6.2 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 **Add ticket type +**. 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'.

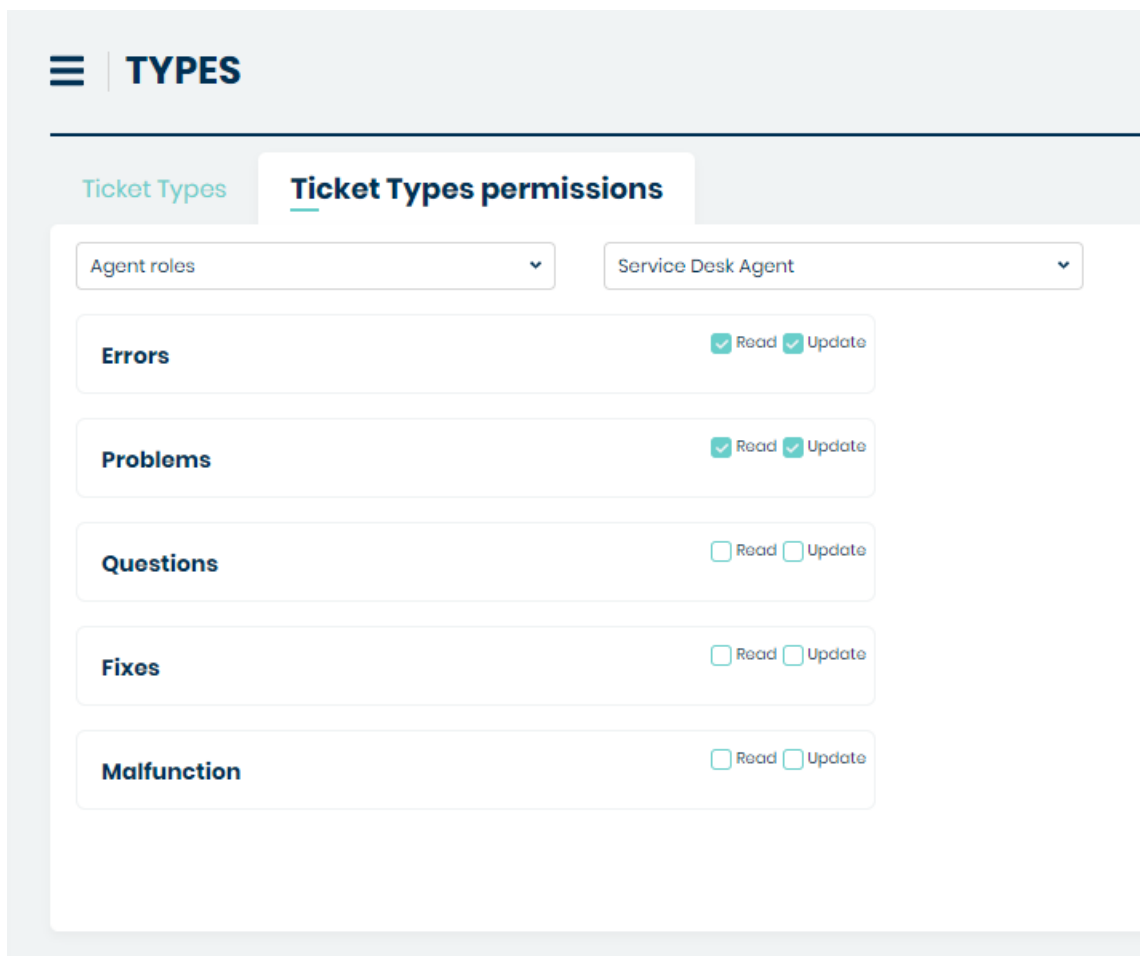
Would you like to delete this ticket type?

Yes

No

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.



TYPES

Ticket Types permissions

Agent roles: Service Desk Agent

| Ticket Type | Read | Update |
|-------------|-------------------------------------|-------------------------------------|
| Errors | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Problems | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Questions | <input type="checkbox"/> | <input type="checkbox"/> |
| Fixes | <input type="checkbox"/> | <input type="checkbox"/> |
| Malfunction | <input type="checkbox"/> | <input type="checkbox"/> |

If you want to change rights, first you need to select one position from the list of available General types of roles.

Agent roles ▼

Service Desk Agent ▼

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).

Agent roles

Company roles

Mint Service Desk

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.

Agent roles ▼

Select Role...

Service Desk Agent

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.

Agent roles ▼

Service Desk Agent ▼

Now we can change the rights by selecting some check-boxes located on the right side of each Ticket type.

| | |
|-------------|---|
| Malfunction | <input type="checkbox"/> Read <input type="checkbox"/> Update |
| Errors | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Update |
| Problems | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Update |
| Questions | <input type="checkbox"/> Read <input type="checkbox"/> Update |
| Fixes | <input type="checkbox"/> Read <input type="checkbox"/> Update |

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)

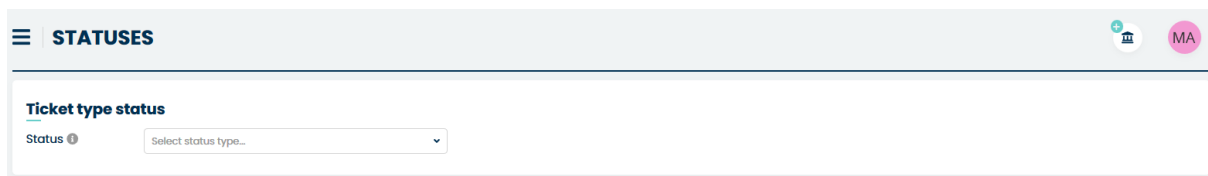
Please notice that when you select the ‘Read’ it will be selected, but the ‘Update’ will not be selected.

However, when you select ‘update’ it will also select ‘Read’. Update means that you can view and change the content of a Ticket.

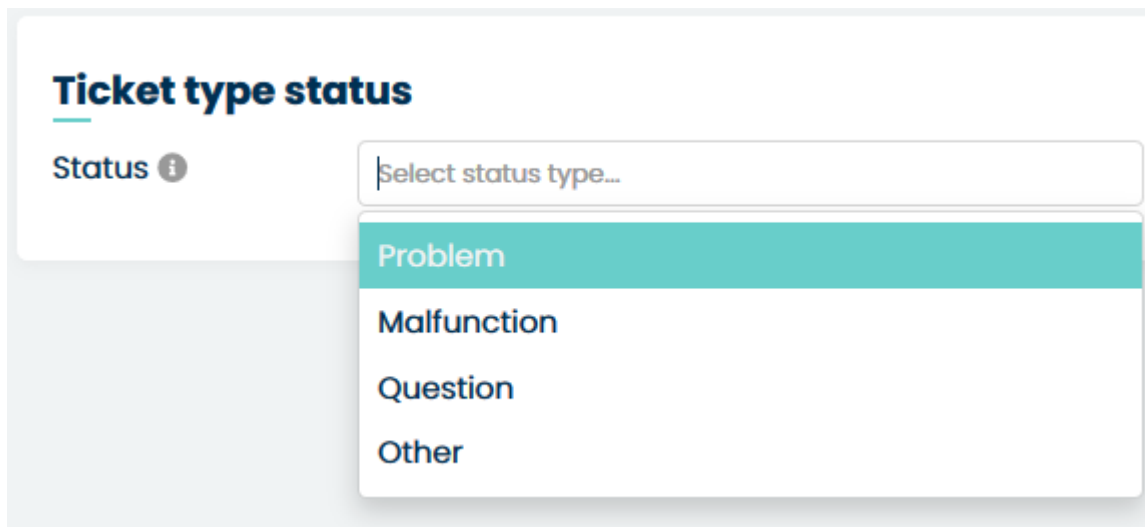
Once you finish making the changes, you need to click  button, otherwise, when you try to leave this part of the system it will inform you that you have some unsaved changes.

5.6.3 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.

Ticket type status

Status ⓘ Other ▼

Value **Type**

Add new +



Ticket type status

Status ⓘ Other ▼

| Value | Type | Stops SLA resolution time | Stops SLA update time | Stops SLA workaround time | Exclude for UI | Select status type... | |
|----------|-----------------------|---------------------------|--------------------------|---------------------------|--------------------------|-----------------------|--|
| Value... | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Value... | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Value... | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Value... | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Value... | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |

Add new +

Save

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.

Ticket type status

Status ⓘ Other ▼

| Value | Type | Stops SLA resolution time | Stops SLA update time | Stops SLA workaround time | Exclude for UI | Select status type... | |
|------------|-----------------------|---------------------------|--------------------------|---------------------------|--------------------------|-----------------------|--|
| Open | Open | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| InProgress | InProgress | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Pending | Pending | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Closed | Closed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| ReOpened | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |

Add new +

Save

Now repeat that for each status and as a result, you will have colors for each status.

Ticket type status

Status ⓘ Others

| Value | Type | Stops SLA resolution time | Stops SLA update time | Stops SLA workaround time | Exclude for UI | Select status type... | |
|------------|-----------------------|---------------------------|--------------------------|---------------------------|--------------------------|-----------------------|--|
| Open | Open | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| InProgress | InProgress | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Pending | Pending | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Closed | Closed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| ReOpened | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |

[Add new +](#)

[Save](#)

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

Ticket type status

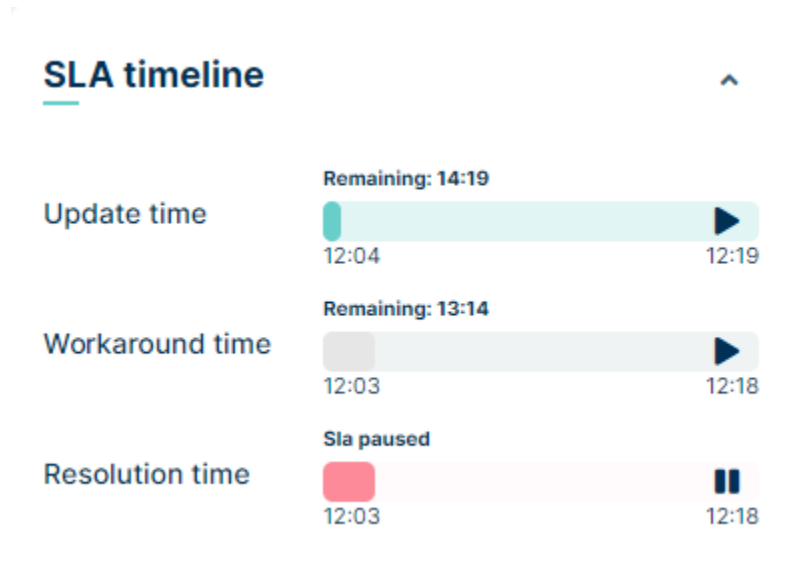
Status ⓘ Others

| Value | Type | Stops SLA resolution time | Stops SLA update time | Stops SLA workaround time | Exclude for UI | Select status type... | |
|------------|-----------------------|-------------------------------------|--------------------------|---------------------------|--------------------------|-----------------------|--|
| Open | Open | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| InProgress | InProgress | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Pending | Pending | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| Closed | Closed | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |
| ReOpened | Select status type... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Select status type... | |

[Add new +](#)

[Save](#)

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.

Ticket type status

Status ⓘ

Others

Value

Type

Open

Open

InProgress

InProgress

Pending

Pending

Closed

Closed

ReOpened

Select status type...

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Select status type...

Select status type...

Select status type...

Select status type...

Select status type...

Add new +

Save

Once you finish, in order to save your changes, use the

Save

 button.

When the button to save is pressed, the option to specify workflow statuses will be unlocked.

Ticket type status

Status ⓘ

Others

Value

Type

Open

Open

InProgress

InProgress

Pending

Pending

Closed

Closed

ReOpened

ReOpened

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

Stops SLA resolution time

Stops SLA update time

Stops SLA workaround time

Exclude for UI

InProgress

Pending

Closed

ReOpened

Closed

ReOpened

InProgress

Add new +

Save

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.

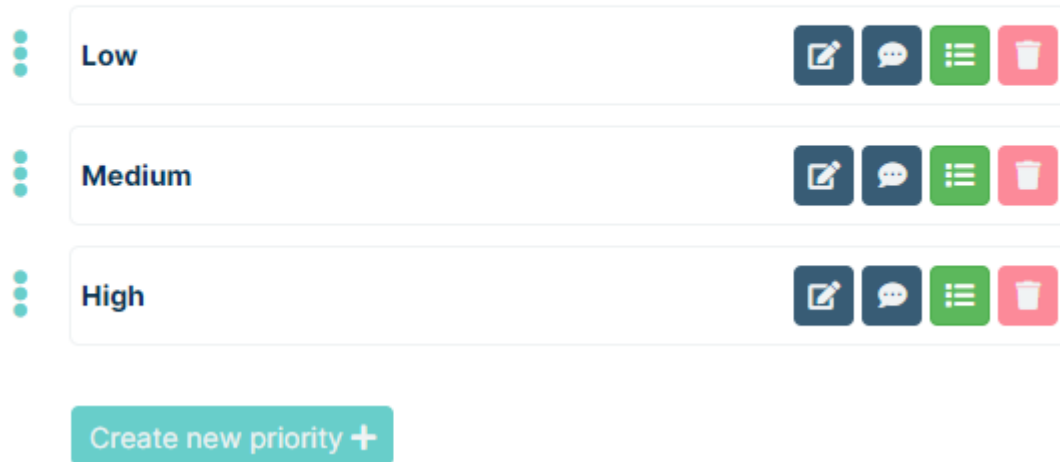
5.6. TICKETS




169


5.6.4 PRIORITIES

In this part of a system, you can add and manage all of the priorities which can be added to SLA rules.


Define priorities





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.

Define priorities

Low

Medium

High

Create new priority +

5.6.5 TICKET NUMBER FORMAT

In this place, you can set up your unique Ticket number pattern.

TICKET NUMBER FORMAT

Name: *

Count from: *

Counter name: *

MT#199901310000011832

Add Field

Prefix

Date format

Tickets counter size

Reset to Default

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

- **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#1999013100000000000987**

5.6.6 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.

5.6.7 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:

Search ticket type: Select service:

Expand Services lists ☐

Ticket Types **Fields groups** **Fields**

default ☒ Errors ☐ Jakub Grupa ☐

int ☒ Relation ☐ Geo ☐ Dict ☐ Regox1 ☐ Regox2 ☐ Date ☐ Att ☐ Relation Contract ☐ Relation Asset ☐ Att2 ☐

Add attribute

Integer Search filter ☒ Multichoice ☒ Required ☐ Problems

Relation Search filter ☒ Required ☐ One to many ☐ Many to many ☐

Geolocalization Search filter ☒ Multichoice ☐ Required ☐ CPU

Dictionary Search filter ☒ Multichoice ☐ Required ☐ Char

Regex Search filter ☒ Multichoice ☐ Required ☐ Integer

Date Search filter ☒ Multichoice ☐ Required ☐

Attachment Search filter ☒ Multichoice ☐ Required ☐ Best group

Relation Contract Search filter ☒ Required ☐ One to many ☐ Many to many ☐ Hardware - laptops

Relation Asset Search filter ☒ Required ☐ One to many ☐ Many to many ☐

Attachment Search filter ☒ Multichoice ☐ Required ☐

Effect after selection:

Search ticket type: Select service:

Expand Services lists ☒

Ticket Types **Fields groups** **Fields**

default ☒ Errors ☐ Jakub Grupa ☐

int ☒ Relation ☐ Geo ☐ Dict ☐ Regox1 ☐ Regox2 ☐ Date ☐ Att ☐ Relation Contract ☐ Relation Asset ☐ Att2 ☐

Restrict field to Service

Integer Search filter ☒ Multichoice ☒ Required ☐ Problems

Relation Search filter ☒ Required ☐ One to many ☐ Many to many ☐

Geolocalization Search filter ☒ Multichoice ☐ Required ☐ CPU

Dictionary Search filter ☒ Multichoice ☐ Required ☐ Char

Regex Search filter ☒ Multichoice ☐ Required ☐ Integer


Date Search filter ☒ Multichoice ☐ Required ☐

Attachment Search filter ☒ Multichoice ☐ Required ☐

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.

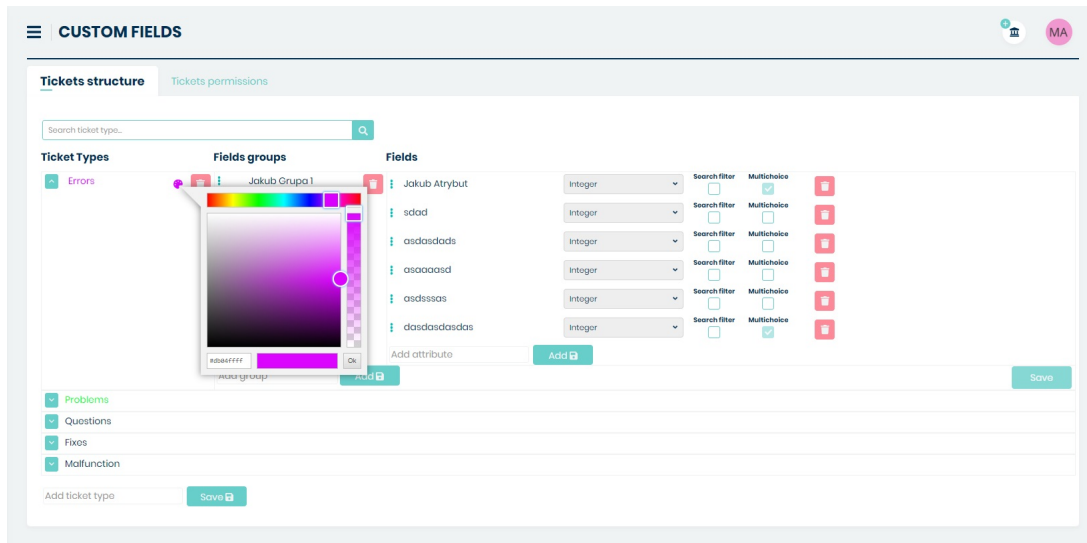
If you want to remove it just click on a trashcan icon  located on the right side. In the new window, you will be asked to confirm the action.

Question 

Would you like to delete this ticket type?

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.

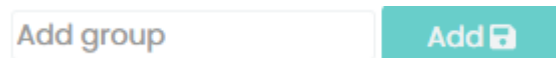



Now repeat that for each ticket type and as a result, you will have colors for each ticket type.



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.

Fields

| | | | | | | |
|-----------------------|----------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Description | Text | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Place of the incident | TextArea | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Contact number | Regex | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | PhoneNumber |

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).

Description ☐ Search filter ☐ Multichoice ☐

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"

Attribute type... ☐ Search filter ☐ Multichoice

Pool
Holds reusable sets of values

Integer
Holds values with no fractional part, only integer numbers.

Date
Holds date and time values.

Real Number
Holds real numbers, numerical data that contains decimal

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 **< 1*/1 >**.

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 a 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 with 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

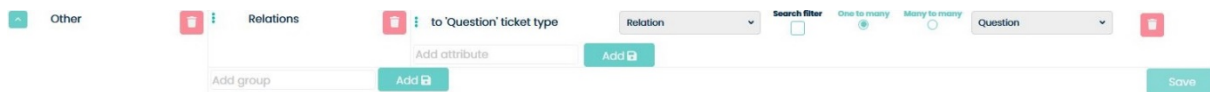
With ‘Text’ you can create a simple field where you can add some text (however with limited space to show). Remember that, unlike when using the ‘Text area’, you will only have one line available for your typed text to be displayed.

Name

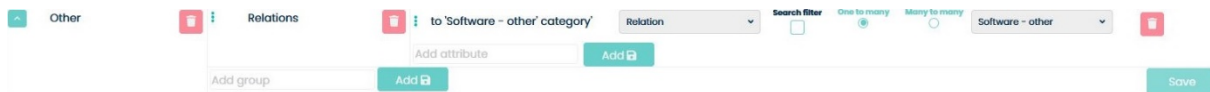
RELATION

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.

September 2020

| | Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|----|-----|-----|-----|-----|-----|-----|-----|
| 36 | 30 | 31 | 01 | 02 | 03 | 04 | 05 |
| 37 | 06 | 07 | 08 | 09 | 10 | 11 | 12 |
| 38 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 39 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 40 | 27 | 28 | 29 | 30 | 01 | 02 | 03 |
| 41 | 04 | 05 | 06 | 07 | 08 | 09 | 10 |

Today

Clear

Close

Date to...

NUM SCOPE



This type of field allows you to choose a value from the defined range.

Team size

Num Scope

Search filter

Multichoice

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 .

X

Min value

Max value

Step

Save

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.

Num Scope

19

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.

Geolocalization

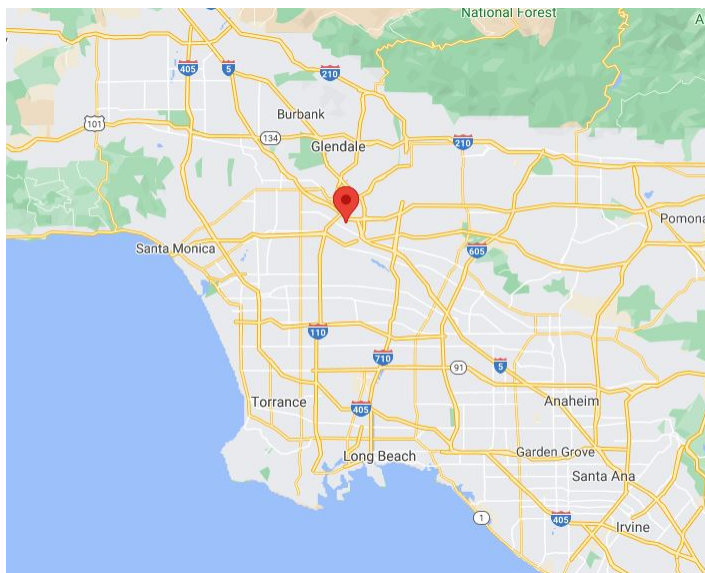
| | |
|------------------|---|
| Address | <input type="text" value="Address..."/> |
| Longitude | <input type="text" value="Longitude..."/> |
| Latitude | <input type="text" value="Latitude..."/> |

Example, I want to write down the address to Los Angeles:

Geolocalization

| | | |
|------------------|--|---|
| Address | <input type="text" value="Los Angeles"/> |  |
| Longitude | <input type="text" value="-118.243683"/> | |
| Latitude | <input type="text" value="34.052235"/> | |

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.


More info

Also, you can enlarge this field, just grab the right bottom corner and drag it down.

More info



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.


Radio

False True

☐ ☐

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.

Checkbox

☐

Label

Text

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:

Hypertext

hypertext

and you will have it in format like below

Hypertext

http://hypertext



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”.

☒ Shared attribute
 Dictionary
 Search filter
 Multichoice
 Required
 Hidden
 ☒ Shared
 Computer Types

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

☒ Shared attribute
 Dictionary
 Search filter
 Multichoice
 Required
 Hidden
 ☒ Shared

☒ Existing attribute
 Existing
 Pattern...

Click on it and you will see the list of available attributes (with “Shared” checkbox selected) that you can inherit

☒ Shared attribute
 Dictionary
 Search filter
 Multichoice
 Required
 Hidden
 ☒ Shared

☒ Existing attribute
 Existing
 Pattern...

Add attribute
 Add
 Shared attribute

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 example, Existing attribute 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 inherit the changes, like on picture below

You can choose any other attribute types like “text”, “date” etc.

SUBSCRIBED RECEIVER

This field is used to subscribe to a particular application. This field consists of two fields Language and Email address.

SUBSCRIBED RECEIVER

Language:

English (US) ▼

Email address:

Value...

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.

Receivers

Receivers *

ticket.subscribed_reciever ✕

Select receivers...

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.



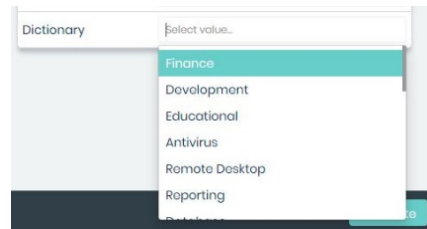
For example, if you choose ‘email’ Regex, a user (Client or agent) will have to type the correct email address.

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.

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.

| Ticket Types | Fields groups | Fields |
|---|--|---|
| <input checked="" type="checkbox"/> Errors | | |
| <input checked="" type="checkbox"/> Problems | | |
| <input checked="" type="checkbox"/> Questions | | |
| <input checked="" type="checkbox"/> Fixes | | |
| <input checked="" type="checkbox"/> Malfunction | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Update | <input checked="" type="checkbox"/> Details <input checked="" type="checkbox"/> Description <input checked="" type="checkbox"/> Place of the incident <input checked="" type="checkbox"/> Contact number <input checked="" type="checkbox"/> Impact level |

If you want to change rights, first you need to select one position from the list of available General types of roles.

Agent roles

Service Desk Agent

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).

Agent roles
Company roles
Mint Service Desk

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.

Agent roles

Select Role...

Service Desk Agent

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.

Agent roles

Service Desk Agent

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.


| | |
|-------------|---|
| Malfunction | <input type="checkbox"/> Read <input type="checkbox"/> Update |
| Errors | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Update |
| Problems | <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Update |
| Questions | <input type="checkbox"/> Read <input type="checkbox"/> Update |
| Fixes | <input type="checkbox"/> Read <input type="checkbox"/> Update |

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

This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

In this part of the system, you can configure conditional attributes.

Tickets structureTickets permissionsConditional attributes


Search by Name, Order...

| # | Name | Order | Dependent | Action Type | Dependees | Creation Date | Action |
|---|------------------|-------|----------------|-------------|-----------|----------------------|-----------------------|
| 1 | Show Real Number | 1 | Relation Assot | IsVisible | Int | 14.01.2022, 10:20:34 | <div>EditDelete</div> |

<<<>>>

Total elements:1


10

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.

CREATE CONDITIONAL ATTRIBUTE

<

+



MA

Order*

Order...

Name*

Name...

Description

Description...

Stop after match

☐

Category*

Category...

Dependent*

Dependent...

Action Type*

Action...

Conditions

Matching conditions*

And

Dependees*

Dependees...

Logic operator*

Logic operator...

Value*

Value...

Stop after match






☐

Add condition

- **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

 **EDIT CONDITIONAL ATTRIBUTE**    

Order*

Name*

Description

Stop after match

☐


Category*


Dependent*

Action Type*

Conditions

Matching conditions*





Dependees*

Logic operator*


Value*


Stop after match

☐

Add condition

In this setting, initially the 'Int' field is hidden but will appear if the 'Description' field is equal to 'Problem'.

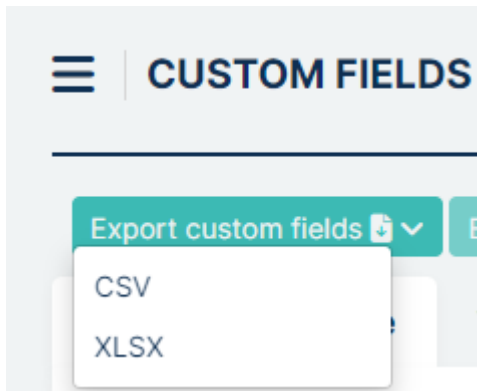
If you want to add another condition, you can press  button.

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 function 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

5.6.8 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.

| TEMPLATES | | | | | |
|-----------|--------------------------------|-------------|----------------|-----------------------|--------|
| | | | | Search by Name, Descr | |
| # | Name | Description | Type | Action | |
| 1 | Confirm Email | | System | Edit | Delete |
| 2 | New Ticket | | System | Edit | Delete |
| 3 | Notification New Article | | System | Edit | Delete |
| 4 | Notification New Comment | | System | Edit | Delete |
| 5 | Notification New Ticket | | System | Edit | Delete |
| 6 | Reset Password | | System | Edit | Delete |
| 7 | Thank You (Custom Agent reply) | | CustomResponse | Edit | Delete |
| 8 | Ticket Changes | | System | Edit | Delete |

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).

CREATE TEMPLATE

MA

Name*

Name...

Description

Description...

Select subject

Select subject...

Select header

Select header...

Select body*

Select body...

Select footer

Select footer...

Template type *

System

Custom Response

* - fields required

Save

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.

Select subject

Select header

Select body*

Select footer


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'.

Template type * ☐ System ☐ 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.

5.6.9 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.

| TEMPLATE COMPONENTS | | | |
|---------------------|---------------------------------------|---------|---|
| Search by Name... | | | |
| # | Name | Type | Action |
| 1 | Best regards - footer | Footer | Edit Delete |
| 2 | Confirm email - body | Body | Edit Delete |
| 3 | New Ticket - body | Body | Edit Delete |
| 4 | New Ticket - footer | Footer | Edit Delete |
| 5 | New Ticket - subject | Subject | Edit Delete |
| 6 | Notification New Article - body | Body | Edit Delete |
| 7 | Notification New Comment - body | Body | Edit Delete |
| 8 | Notification New Ticket - body | Body | Edit Delete |
| 9 | Reset Password - body | Body | Edit Delete |
| 10 | Thank you - Body (Custom Agent reply) | Body | Edit Delete |

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’).

[illegible]

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.


Component name*

Component type* ☐ System ☐ BODY ☐ FOOTER

Content*

* - fields required

Save

Once you finish just click the  button.

Remember that after creating a new component you can always either change anything inside it (

 Edit

button) or even delete it from the system (

 Delete

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.

5.6.10 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.

 MINT Offer Template.docx 25.09.2020 13:21 Dokument programu Microsoft Word 18 KB

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 | {{TicketCreation-Date}} | Agent/Client Dash-board | The exact date when the ticket was created. |

TICKET DETAILS

My PC is turning off after couple of minutes. 2

Wtorek, 22 września 2020

MINT Customer | 22.09.2020, 11:38:35

Hello,

Starting from yesterday my PC is tuning off after a couple of minutes from the momen I turn it on. Before that happens I can hear that fans inside the case are working very loud. Then I have an error (blue screen).

I would be very grateful for any help.

Best regards,

Kamil

Internal discussion

MC

Company user

Sent

MintSD Assistant | 22.09.2020, 11:38:46

Hi MintSD,

Show more

Internal discussion

MA

Company user

- The agent 'Mint Agent' has been assigned to the ticket | Mint Agent | 22.09.2020, 11:26:05
- The ticket priority has been changed to the 'High'. | Mint Agent | 22.09.2020, 11:26:37
- The ticket priority has been changed to the 'Critical'. | Mint Agent | 22.09.2020, 11:26:45
- Ticket type has been changed to 'Problem'. | Mint Agent | 22.09.2020, 11:26:52

Sent

Mint Agent | 22.09.2020, 11:28:14

Hi Kamil,

Give me a second and I will return to you with some answers :)

Internal discussion

Email channel Internal channel

Enter a message...

Add attachment Custom template Attach document Discard draft Private note Reply

Details

Ticket number: MT#202009220000000001 3
Company user: Mint Customer customer@mintisd.com 4
Company: Mint Service Desk 5
Status: In progress 6
Assignee: Mint Agent 7
Queue: EU - support 8
Related to: Strange probl... x Search Q
Assets: DELL laptop for... x Search Q
Ticket type: Question 9
Priority: Critical 10
Service: EU Support - problems/malfunction 11
Reminder: Reminder...
Age: 5d 12

SLA timeline

Resolution time

Expire!

22.09.2020 22.09.2020

Description

Description Now value...

DASHBOARD

All queues

☐ Show closed Create new ticket + Save as widget

Queues

EU - support Poland - support

Filter by

Status Select status...

Clear filters Export tickets

13

Search by Subject, Status

| Ticket number | Subject | Creation date | Last modification | Company | Age | Status |
|--------------------------|---|----------------------|----------------------|-------------------|-----|-------------|
| MT#202009220000000000... | Strange problems with image quality/display. | 22.09.2020, 13:30:26 | 28.09.2020, 08:48:04 | Mint Service Desk | 5d | In progress |
| MT#202009220000000000... | My PC is turning off after couple of minutes. | 22.09.2020, 11:38:35 | 24.09.2020, 14:58:57 | Mint Service Desk | 5d | In progress |

< >

10

You can also use Custom Field template snippet from Tickets and Users section. Schema for creating this snippet looks like below:

{{GroupName:AttributeName}}

Example:

The screenshot shows the 'CUSTOM FIELDS' configuration page. It has a header with a menu icon and the title 'CUSTOM FIELDS'. Below the header, there are two buttons: 'Export custom fields' and 'Export custom fields rights'. The main content area has three tabs: 'Tickets structure' (active), 'Tickets permissions', and 'Conditional attributes'. Under 'Tickets structure', there is a search bar for 'Search ticket type...' and a dropdown for 'Select service...'. Below these, there is a table with columns 'Ticket Types', 'Fields groups', and 'Fields'. The 'Ticket Types' column lists 'EU Support', 'Hardware', 'Desktop', and 'Laptop'. The 'Fields groups' column lists 'Hardware', 'Desktop', and 'Laptop'. The 'Fields' column lists 'Text', 'Search filter', 'Multichoice', and 'Required' for each group. There are also checkboxes for 'Expand Services lists' and 'Search filter'.

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 attribute 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:

{{Assignee}}

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.




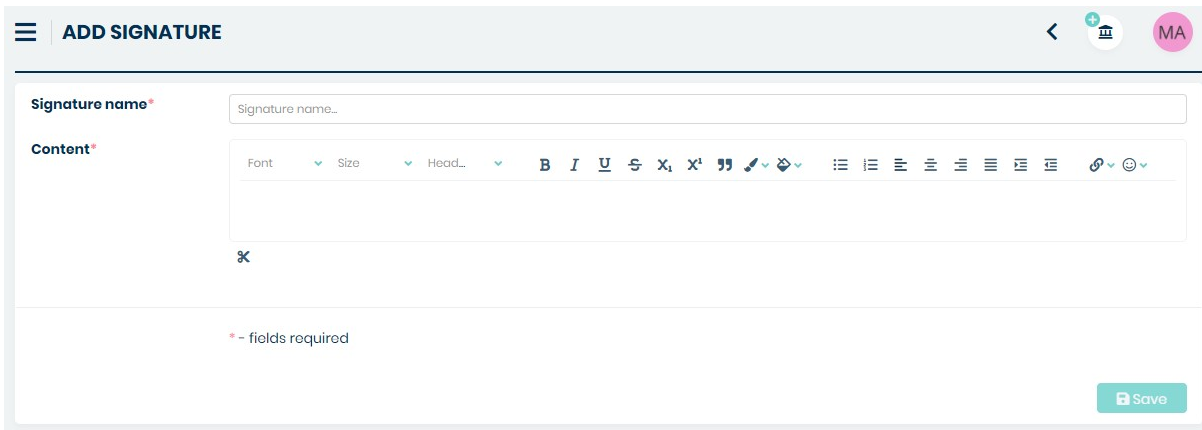
Once you decide that everything is in order click  button. After that, you will notice a new position on the list of available Document templates.

| # | Name | Action |
|---|----------------------------|---|
| 1 | MINT Service Desk - offer | Edit Delete |
| 2 | Win 10 x64 license - offer | Edit Delete |

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.

5.6.11 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.

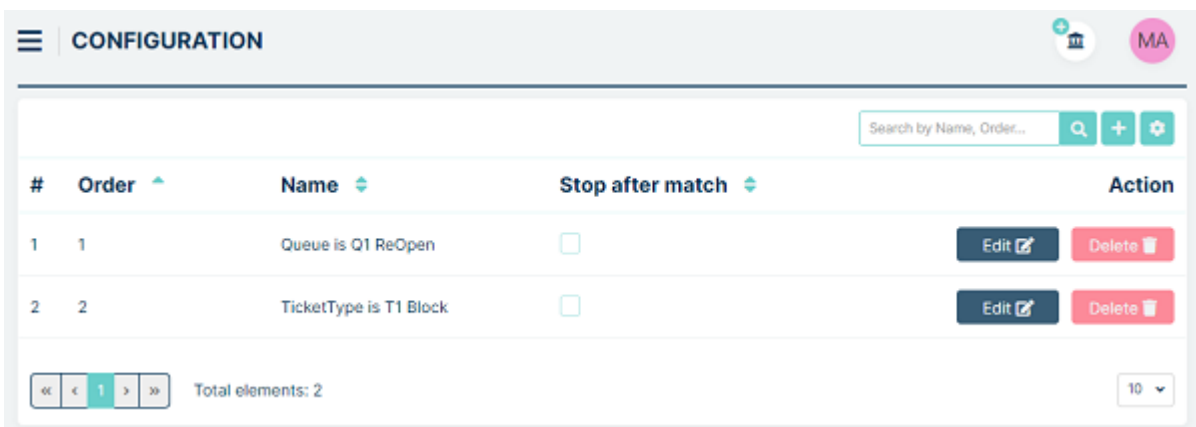
After completing the fields, press the  button.

5.6.12 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.



| # | Order | Name | Stop after match | Action |
|---|-------|------------------------|--------------------------|---|
| 1 | 1 | Queue is Q1 ReOpen | <input type="checkbox"/> | Edit Delete |
| 2 | 2 | TicketType is T1 Block | <input type="checkbox"/> | Edit Delete |

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:

Message element *
1 Queue

Operation type *
IsEqual

Element value *
Q1

All conditions are met

One of the conditions is met *

Order *

1

Name *

Queue is Q1 ReOpen

Reopen when closed

☒

Reopen on pending close

☐

Block closed ticket

☐

Stop after match

☒

* - fields required

5.7 SERVICES

The next section of the Admin Portal is “Services” where you can create and manage your Contracts, Contracts Types, Services, Calendars, SLA parameters.

5.7.1 CONTRACTS

In this part of a system, you can add and manage all of Contracts, including parameters, calendars, and priorities.

CONTRACTS

MA

Please select fields to see...

| # | Name | Description | Action |
|---|----------|----------------------|---|
| 1 | Contract | Contract Description | <div><div>Edit</div><div>Delete</div></div> |

«

<


1

>

»

Total elements: 1

10

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.

CREATE NEW CONTRACT

<

+

MA

Contract

Enable contract

☐

Contract name*

Contract name...

Description

Description

☐

Enable without company

☐

Enable for all companies

Companies

Select companies...

Services

Select services...

+

Service is required

☐ Service is required

Contract Types*

Select contract types...

Contract period

Date from (YYYY-MM-DD)

-

Date to (YYYY-MM-DD)

Hours per month

Value...

Priorities

☐ Name

There is no data to show.

Parameters

Parameters

Select parameters...

+

At first you can choose “Enable contract” to set it as activate 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.

Services

+

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.

Create new service

| | |
|---------------------|--|
| Service name* | <input type="text" value="Service name_"/> |
| Service description | <input type="text" value="Description_"/> |
| Default queue | <input type="text" value="Select queue_"/> ▼ |

Ticket Types


- | | |
|--------------------------|-------------|
| <input type="checkbox"/> | Name |
| <input type="checkbox"/> | Errors |
| <input type="checkbox"/> | Problems |
| <input type="checkbox"/> | Questions |
| <input type="checkbox"/> | Fixes |
| <input type="checkbox"/> | Malfunction |
| <input type="checkbox"/> | Others |

[Cancel](#)[Save](#)

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.

Create new parameters

| | |
|------------------|---|
| Parameters name* | <input type="text" value="Parameters name..."/> |
| Description | <input type="text" value="Description"/> |
| Calendar* | <input type="text" value="Select calendar..."/> ▼ |

#1 Escalation times ▼

| | | | |
|--|---|---|---|
| Ticket types | <input type="text" value="Select ticket types..."/> | | |
| Priorities | <input type="text" value="Select priorities..."/> | | |
| Reset update time after agent response | <input type="checkbox"/> | | |
| Reset time after ticket reopen | <input type="checkbox"/> | | |
| Response time | <input type="text"/> | % | <input type="text"/> min <input type="button" value="Select notification target..."/> |
| Update time | <input type="text"/> | % | <input type="text"/> min <input type="button" value="Select notification target..."/> |
| Workaround time | <input type="text"/> | % | <input type="text"/> min <input type="button" value="Select notification target..."/> |
| Resolution time | <input type="text"/> | % | <input type="text"/> min <input type="button" value="Select notification target..."/> |

Force escalation

| | | | | |
|--|----------------------|---|----------------------|------------------------|
| <input type="text" value="Select force esc..."/> ▼ | <input type="text"/> | % | <input type="text"/> | Maximum number of uses |
|--|----------------------|---|----------------------|------------------------|

+

The detailed process of creating Parameters will be explained in the ‘SLA parameters’ section of this guide.

When you finish, just click on button.

5.7.2 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

Contract period 1.09.2023 - 30.09.2023

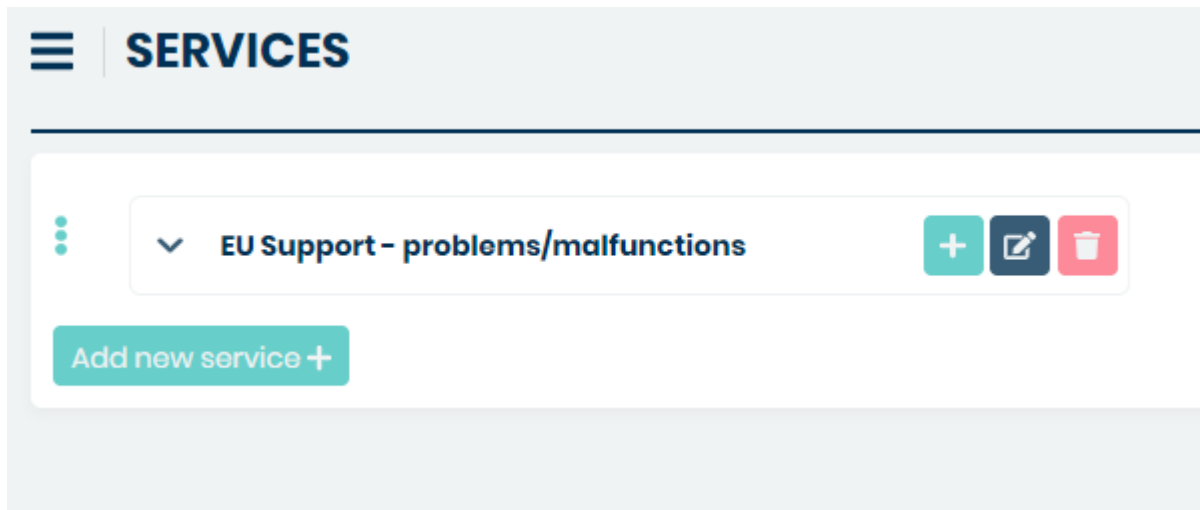
Hours per month 5


Time spent in
current month

Time remaining in 5h
current month

5.7.3 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.

Service

Service name*

Service description


Default queue ▼



Ticket Types


| | |
|--------------------------|-------------|
| <input type="checkbox"/> | Name |
| <input type="checkbox"/> | Errors |
| <input type="checkbox"/> | Problems |
| <input type="checkbox"/> | Questions |
| <input type="checkbox"/> | Fixes |
| <input type="checkbox"/> | Malfunction |
| <input type="checkbox"/> | Others |

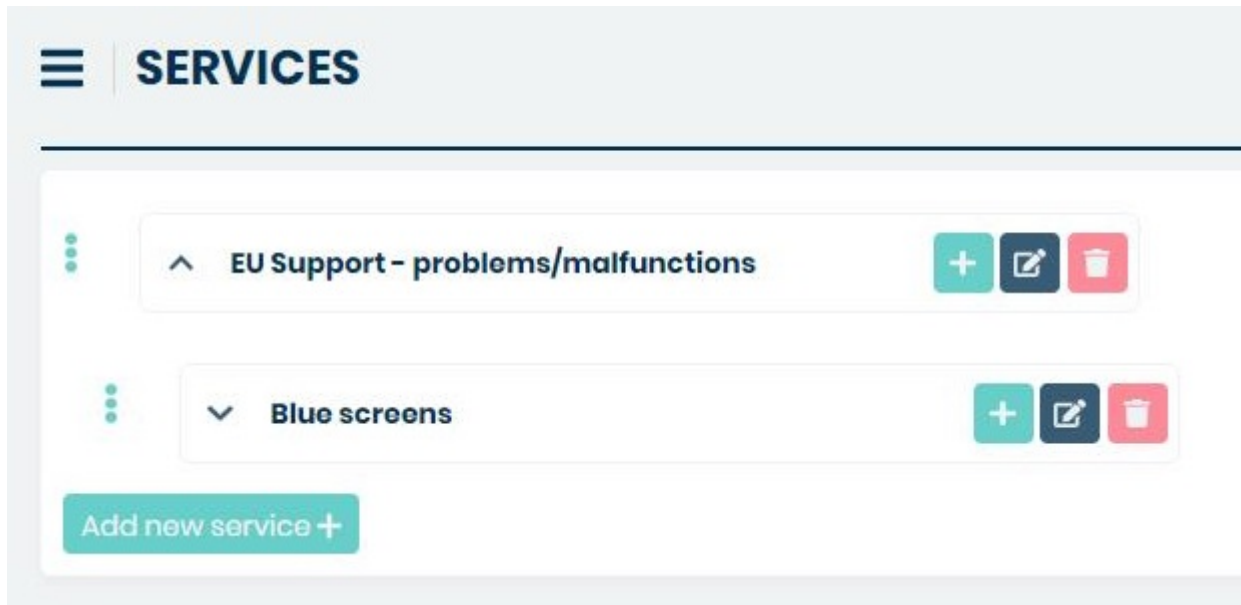


Now you need to type a name for your Service ('Service name'). It is required (field is marked with *). If you want you can add some additional description (optional).

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.

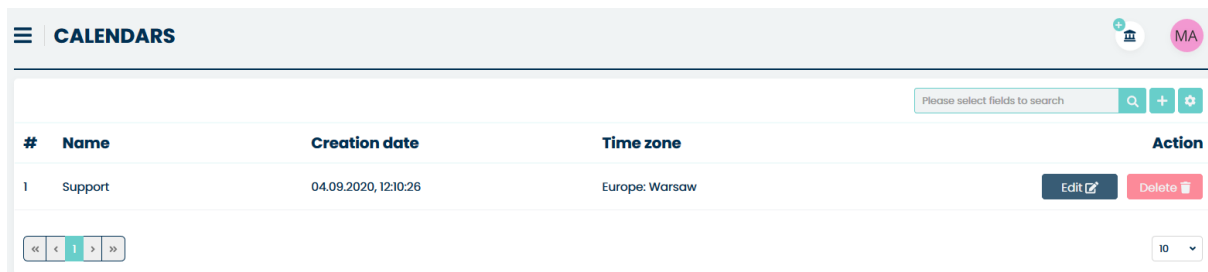
If you want to make some changes in already existing Service, you can do it by clicking on the  button. If you want to delete any of the services, just click on the  button.

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.

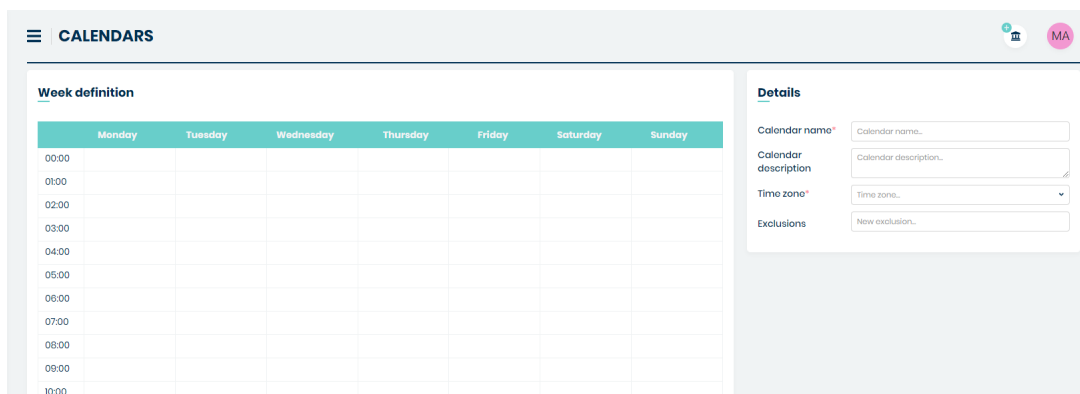


5.7.4 CALENDARS

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.

Details

| | |
|----------------------|--|
| Calendar name* | <input type="text" value="Calendar name_"/> |
| Calendar description | <input type="text" value="Calendar description_"/> |
| Time zone* | <input type="text" value="Time zone_"/> ▼ |
| Exclusions | <input type="text" value="New exclusion_"/> |

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.

Work hours

Begin

06 : 00

End

07 : 00



First day

Wednesday

Last day

Wednesday

Delete Cancel Save

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.

Week definition

| | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|-------|---------------|---------|-----------|----------|--------|----------|--------|
| 00:00 | | | | | | | |
| 01:00 | | | | | | | |
| 02:00 | | | | | | | |
| 03:00 | | | | | | | |
| 04:00 | | | | | | | |
| 05:00 | | | | | | | |
| 06:00 | 06:00 - 16:00 | | | | | | |
| 07:00 | | | | | | | |
| 08:00 | | | | | | | |
| 09:00 | | | | | | | |
| 10:00 | | | | | | | |
| 11:00 | | | | | | | |
| 12:00 | | | | | | | |
| 13:00 | | | | | | | |
| 14:00 | | | | | | | |
| 15:00 | | | | | | | |
| 16:00 | | | | | | | |

Work hours

Begin

06 : 00

End

16 : 00

First day

Monday


Last day

Friday

Delete Cancel Save

If, while being in this newly opened window, you change Starting/ending hour or Starting/ending day and hit **Save** 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 and 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 **Create** button. A new calendar will appear now on the calendars list.

| CALENDARS | | | | |
|-----------|---------|----------------------|----------------|---|
| # | Name | Creation date | Time zone | Action |
| 1 | Support | 04.09.2020, 12:10:26 | Europe: Warsaw | Edit Delete |

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.








Would you like to delete this calendar?


Yes

No

5.7.5 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).

| PARAMETERS | | | | |
|---|--|----------------------|----------|--|
| <div> <div>Please select fields to search</div> <div>    </div> </div> | | | | |
| # | Name | Creation date | Calendar | Action |
| 1 | Parameters for Questions | 04.09.2020, 12:15:58 | Support | <div>   </div> |
| 2 | Parameters for Support - problems/malfunctions - high/crit | 04.09.2020, 12:14:54 | Support | <div>   </div> |
| <div> <div> <div><<</div> <div><</div> <div>1</div> <div>></div> <div>>></div> </div> </div> | | | | <div> <div>10</div> <div>></div> </div> |

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.

Parameters

Parameters name*

Description

Calendar*

#1 Escalation times

Ticket types

Priorities

Reset update time after agent response ☐

Reset time after ticket reopen ☐

| | | | | | |
|-----------------|----------------------|---|----------------------|-----|---|
| Response time | <input type="text"/> | % | <input type="text"/> | min | <input type="text" value="Select notification targets..."/> |
| Update time | <input type="text"/> | % | <input type="text"/> | min | <input type="text" value="Select notification targets..."/> |
| Workaround time | <input type="text"/> | % | <input type="text"/> | min | <input type="text" value="Select notification targets..."/> |
| Resolution time | <input type="text"/> | % | <input type="text"/> | min | <input type="text" value="Select notification targets..."/> |

Force escalation

 % Maximum number of uses



 Save

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.

% min

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.

Response time * % min

User: Mint Agent x

Role: Service Desk Agent x

Queue: EU - support x

Select notification targets...

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:

| | | | | | |
|-----------------|---------------------------------|---|----------------------------------|-----|--------------------------------|
| Response time | <input type="text" value="10"/> | % | <input type="text" value="120"/> | min | Select notification targets... |
| Update time | <input type="text"/> | % | <input type="text"/> | min | Select notification targets... |
| Workaround time | <input type="text"/> | % | <input type="text"/> | min | Select notification targets... |
| Resolution time | <input type="text" value="50"/> | % | <input type="text" value="300"/> | min | Select notification targets... |

Force escalation

| | | | | | |
|---------------|---|---------------------------------|---|--------------------------------|------------------------|
| Response time | ▼ | <input type="text" value="50"/> | % | <input type="text" value="5"/> | Maximum number of uses |
|---------------|---|---------------------------------|---|--------------------------------|------------------------|

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.

5.8 ASSETS

5.8.1 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.

≡

CREATE ASSET





New asset

Name*

Description

Categories*

Assigned agents:

Company

Attachments

 Click to attach file

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.

Assigned agents:

Select user...

Company

Select All


Clear

Attachments

Mint Agent


Agent Tomek

Jan Nowak

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.

EDIT ASSET

<  MA

Edit asset

Show related tickets


Name*

Win 10, x64, OEM

Description

Description...

Categories*

Software - OS 

Select category...

Assigned agents:

Select user...

Company

Select company...

Attachments

Click to attach file

Owner information

Operating Systems

OS type

Select value...

Numer of users

New value...

License type


Select value...

More info

New value...

Expires at

Value...

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

5.8.2 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.

ASSET MANAGEMENT

Assets

Categories

- Hardware - PC
- Hardware - PC/Support
- Other
- Software - other
- Software - others

[Show more](#)

Filter by

Period

Select period...

[Clear filters](#) [Export assets](#)

Search by Name, Description...

| Id | Name | Description | Creation date | Action |
|-----|----------------|---------------------------------------|----------------------|---|
| 103 | iPhone 15 | New iPhone for IT Department members. | 29.12.2020, 14:37:07 | Edit Delete |
| 102 | Samsung phones | | 02.12.2020, 14:47:08 | Edit Delete |
| 101 | iPhone 14 | | 01.12.2020, 12:00:00 | Edit Delete |
| 100 | iPhone 13 | | 24.11.2020, 13:49:06 | Edit Delete |
| 99 | iPhone 12 | | 24.11.2020, 12:49:00 | Edit Delete |
| 98 | iPhone 11 | | 24.11.2020, 13:40:54 | Edit Delete |
| 97 | 3GS Max 10 | | 24.11.2020, 13:48:48 | Edit Delete |
| 96 | MS Windows 10 | | 24.11.2020, 12:40:40 | Edit Delete |
| 95 | Dell laptops | | 17.11.2020, 11:54:58 | Edit Delete |
| 94 | Asus laptops | | 13.11.2020, 15:45:11 | Edit Delete |

10 2 3 7 Total elements: 69

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).

Assets

Category: Hardware - PC/laptops x

Categories

Hardware - PC/laptops x

Hardware - phones

Other

Software - OS

Software - other


Filter by

Period

Select period... v

PC / laptops

Hardware - PC/laptops

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.

Assets

Category: Hardware - PC/laptops × CPU model: AMD Ryzen 5 ×

PC / laptops
Hardware - PC/laptops

Type
Select value...

CPU producer
Select value...

CPU model
AMD Ryzen 5 ×

Select value...

GPU producer
Select value...

GPU model
Select value...

Memory
Select value...

Video memory
Select value...

HDD type
Select value...

HH size
Select value...

Clear filters ✕ Export assets ⌵

| Id | Name | Description | Creation date |
|----|---------------|-------------------------------|----------------------|
| 2 | Dell latitude | New laptop for IT department. | 04.09.2020, 11:18:07 |

« < 1 > »

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.

Assets

Category: Hardware - PC/laptops × CPU model: AMD Ryzen 5 × GPU producer: NVIDIA × GPU model: GTX 1660Ti × Memory: 16 GB × Video memory: 6 GB ×

Type
Select value...

CPU producer
Select value...

CPU model
AMD Ryzen 5 ×

Select value...

GPU producer
NVIDIA ×

Select value...

GPU model
GTX 1660Ti ×

Select value...

Memory
16 GB ×

Select value...

Video memory
6 GB ×

Select value...


HDD type
Select value...

HH size
Select value...

Clear filters ✕ Export assets ⌵ Search by Name, Descripti

| Id | Name | Description | Creation date |
|----|---------------|-------------------------------|----------------------|
| 2 | Dell latitude | New laptop for IT department. | 04.09.2020, 11:18:07 |

« < 1 > »

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.

Q
⚙

In order to see the Asset information just click on its name. You will be moved to Asset details view.

ASSET DETAILS

Edit asset


Generate pdf

Print QR

Asset history

Resources

Asset label



Basic information

Name

Dell laptops

Description

Categories

Hardware - laptops

PC/laptops ^

Type

Laptop

CPU Producer

AMD

CPU Model

Ryzen

GPU Producer

NVIDIA

GPU Model

RTX 3060

Memory

16GB

GPU memory

12GB

Memory Type

SSD

From this view, you can move to ‘Edit asset’ view. Just click on the **Edit asset** button.

If you want to export asset into pdf file press **Generate pdf** button.

To print the QR code, press **Print QR** 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 **Asset history** button. After pressing this button, the user will be taken to a table with a list of changes.

ASSET HISTORY

Creation date

Type

Action

| | | |
|----------------------|------------------|----------------|
| 08.08.2022, 16:01:33 | Update values | Preview |
| 08.08.2022, 16:01:33 | Update base data | Preview |
| 08.08.2022, 16:01:17 | Update values | Preview |
| 08.08.2022, 16:01:17 | Update base data | Preview |

1

2

3


4


Total elements: 4


10


If this information is not enough, there is a button **Preview** next to each change that, when pressed, will display more details below the changes.

| ASSET HISTORY | | | |
|--|------------------|---------|----|
| Creation date | Type | Action | |
| 08.08.2022, 16:01:33 | Update values | Preview | |
| 08.08.2022, 16:01:33 | Update base data | Preview | |
| 08.08.2022, 16:01:17 | Update values | Preview | |
| 08.08.2022, 16:01:17 | Update base data | Preview | |
| <div> <div>1</div> <div><</div> <div>></div> <div>10</div> </div> Total elements: 4 | | | 10 |
| Basic information Create date: 08.08.2022, 16:01:17 Name: Win 10, x64, OEM Description: Categories: Software - OS | | | |

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.

2
 Dell latitude
 New laptop for IT department.
 04.09.2020, 11:18:07
 


| EDIT ASSET | | | |
|---|--|---|--|
| Edit asset  | | Owner information | |
| Name* Win 10, x64, OEM Description Description... Categories* Software - OS Assigned agents: Mint Agent Company Mint Service Desk Assigned company users: Eryk Customer Attachments | | Operating Systems OS type IOS Numer of users 44 License type Open Source More info New value... Expires at 27.01.2023 16:01 | |

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.

Would you like to delete this instance?

Yes

No

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.

EDIT ASSET

Edit asset Show related tickets

Name* Dell latitude

Description New laptop for IT department.

User tickets

All queues

Queues

- EU - support
- Poland - support

Ticket types

- Malfunction
- Other
- Problem
- Question

Search by Subject, Status...

| Ticket number | Subject | Last modific... | Company | Age | Status |
|------------------------|--------------------|----------------------|-------------------|-----|-------------|
| MT#2020092200000000... | Strange problem... | 22.09.2020, 15:19:43 | Mint Service Desk | 2d | In progress |

PC / laptops

Type Laptop

CPU producer AMD

AMD Ryzen 5

NVIDIA

GTX 1660TI

16 GB

6 GB

SSD M.2

1 TB

Close

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.

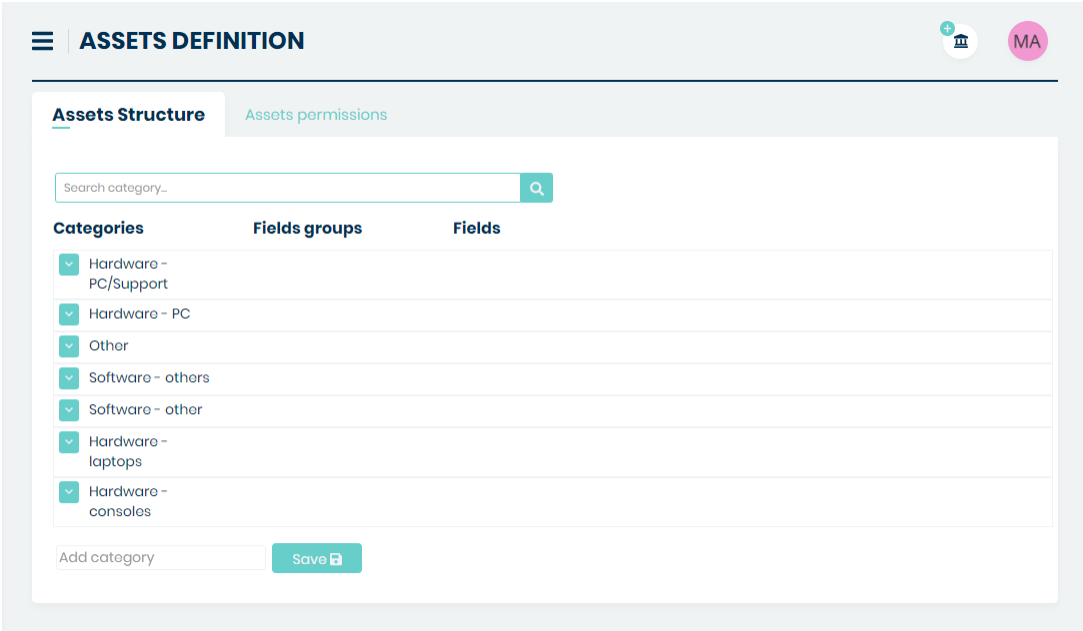
Your access rights has been changed. You are not authorized to view this page.

5.8.3 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

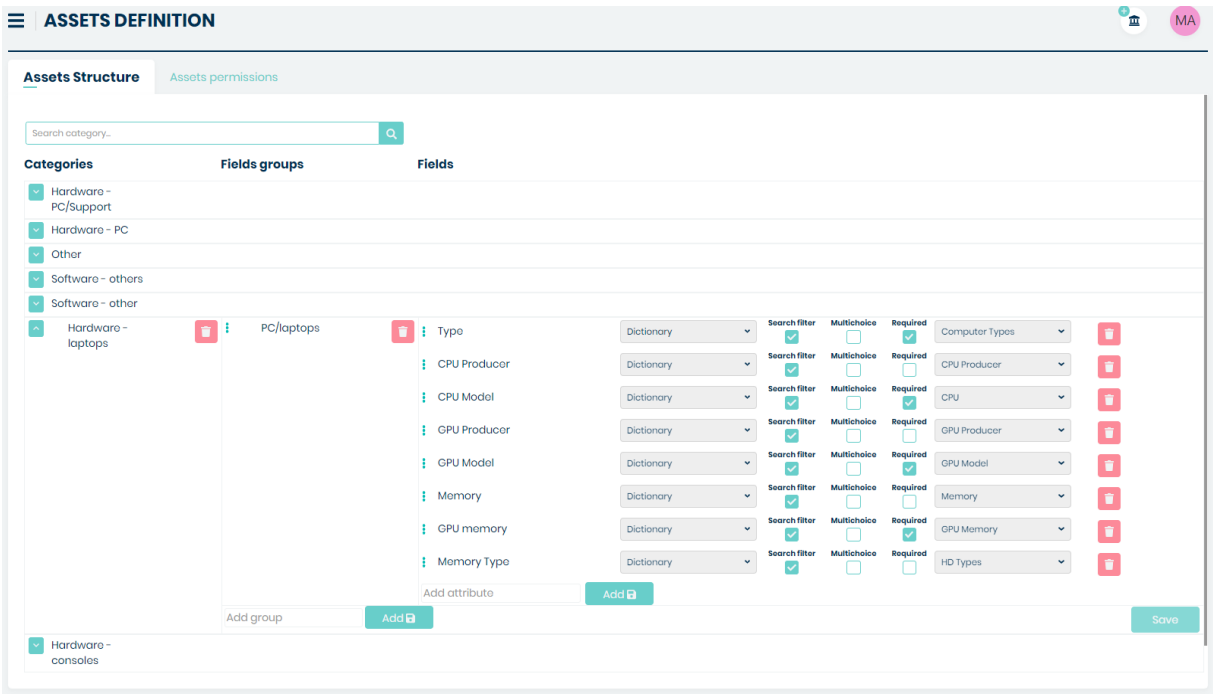
First is the 'Assets Structure' tab, where you can customize the whole structure for Asset categories along with their groups of Attributes, single attributes, and their values.



By default, the content of each Ticket Type is hidden, and you only see the Ticket type name.

Software - OS

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.


Would you like to delete this category?

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

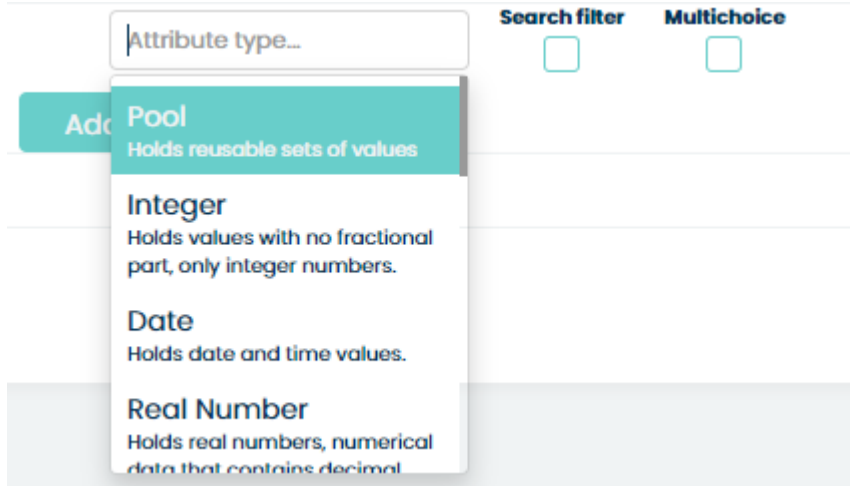
Attributes are the fields that you will use to add detailed information for your assets. Each group must have at least one attribute. Without it, you won’t be able to save a new, fresh group.

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.

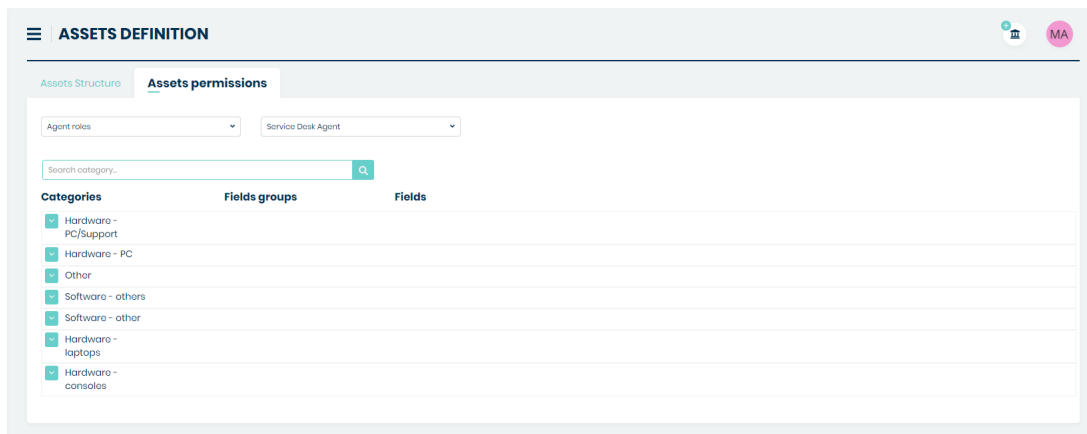
The available types are “Pool”, “Integer”, “Date”, “Real Number”, “Text”, “Relation”, “Date Scope”, “Num Scope”, “Geolocation”, “Text area”, “Alert Date”, “Attachment”, “Radio”, “Checkbox”, “Label”, “Regex”, “Dictionary”, “Relation Asset”, “Relation Ticket”, “Relation Contract”, “Relation Company”, “Relation 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).

Service Desk Agent

Agent roles

Company roles

Mint Service Desk

Q

Groups

Attributes

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.

Agent roles

Select Role...

Search category...

Q

Service Desk Agent

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.

Search category...

Q

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.

Categories

| | | |
|--------------------------------|-------------------------------------|-------------------------------------|
| <div>^</div> Hardware – phones | Read | Update |
| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

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.

Attributes

| | | |
|-------------|-------------------------------------|-------------------------------------|
| Producer | Read | Update |
| | <input type="checkbox"/> | <input type="checkbox"/> |
| Model | Read | Update |
| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Memory size | Read | Update |
| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| OS type | Read | Update |
| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Screen size | Read | Update |
| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |


Save

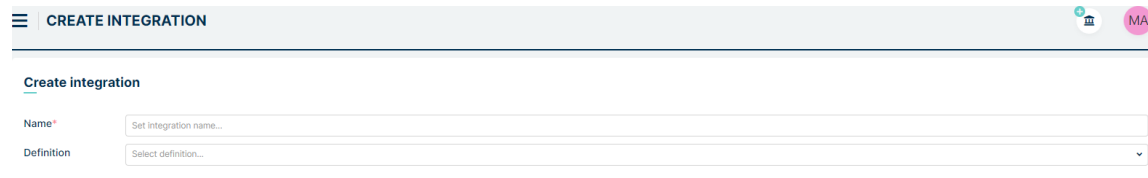
Once you finish making the changes, you need to click

Save


 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.

5.8.4 ASSETS INTEGRATIONS

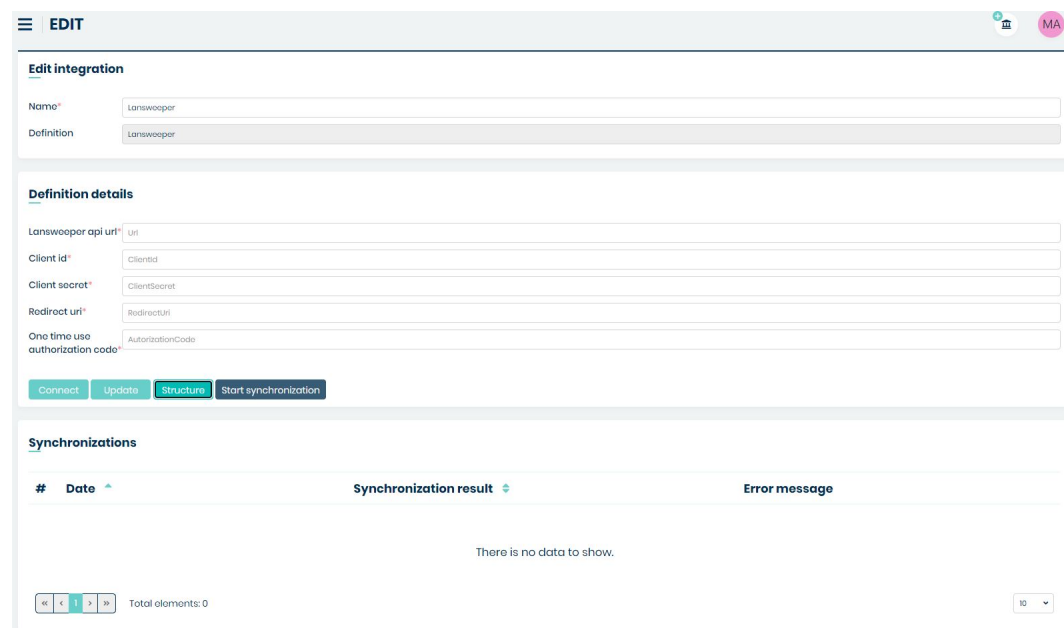
In this part of the system assets can be integrated with Lansweeper. To do this, press the  button.



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.

5.9 FIELDS SETTINGS

5.9.1 DICTIONARIES

As was mentioned before, the definition of each 'Dictionary' attribute type along with its values, can be done here.

| DICTIONARIES | | | | |
|--------------|------------------|---|-------------------|--|
| | | | Search by Name... | |
| # | Name | Action | | |
| 1 | CPU producer | Edit Delete | | |
| 2 | Computer Types | Edit Delete | | |
| 3 | GPU manufacturer | Edit Delete | | |
| 4 | HD Types | Edit Delete | | |
| 5 | HDD size | Edit Delete | | |
| 6 | Impact level | Edit Delete | | |
| 7 | License Types | Edit Delete | | |
| 8 | Memory size | Edit Delete | | |
| 9 | Mime | Edit Delete | | |
| 10 | Musical card | Edit Delete | | |

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.

Operational Systems ^

OS type

Select value...

Numer of users

New value...


Licence type

Select value...

Commercial
Freeware
Limited License
Unlimited Site License
Open Source
Public Domain
Shareware

More info

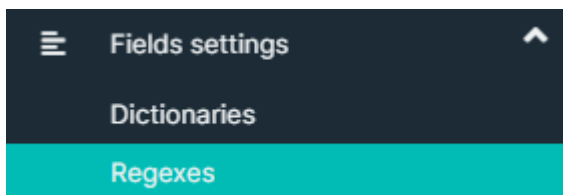
Expires at

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  **Create** 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.


Now, let’s go back to the main Dictionary list. Whenever you decide to change anything in any of the dictionaries, just click the  **Edit** button located on the right side (‘Action’ column) of each dictionary on the list.

Figure 1. The effect of the number of nodes on the number of nodes in the network.



CREATE NEW REGEX

Name*

Value

Is hidden ☐

* - fields required

[Create](#)

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 [Create](#) 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 [Edit](#) button located on the right side of the main view, in the ‘Action’ column.

Search by Name, Value...

| | Action |
|--|----------------------|
| | Edit |
| | Edit |

5.10 NOTIFICATIONS

5.10.1 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.

| NOTIFICATIONS | | | | | |
|-------------------|------------------|--|---------------------|-------------------------------------|---|
| Search by Name... | | | | | |
| # | Name | Events | Channels | Active | Action |
| 1 | New Article | Now article | Push, Email, System | <input checked="" type="checkbox"/> | Edit Delete |
| 2 | New Comment | Now comment | Push, Email, System | <input checked="" type="checkbox"/> | Edit Delete |
| 3 | New Ticket | Now ticket | System, Push, Email | <input checked="" type="checkbox"/> | Edit Delete |
| 4 | Pending Reminder | Reminder | Push, Email, System | <input checked="" type="checkbox"/> | Edit Delete |
| 5 | Queue change | Queue change | System | <input checked="" type="checkbox"/> | Edit Delete |
| 6 | SLA Expiration | SLA Update: expiration, SLA Resolution: expiration, SLA Response: expiration | Push, Email, System | <input checked="" type="checkbox"/> | Edit Delete |
| 7 | SLA Notification | SLA Update: notification, SLA Response: notification, SLA Resolution: notification | Email, System, Push | <input checked="" type="checkbox"/> | Edit Delete |
| 8 | Ticket closed | Ticket closed | System | <input checked="" type="checkbox"/> | Edit Delete |

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 new comment/internal message in the Ticket Details communication section. Those can be general internal messages send by the Agent ('Internal channel') or 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

Name *

Description

Show in user profile
☒ Company user ☒ Agent

Notification status
☐

Notification color

Notification icon

Events

Events *

Filters

ticket.queue ⓘ

ticket.service ⓘ

ticket.assignee ⓘ

ticket.article_author ⓘ

ticket.mentioned_queue ⓘ

ticket.mentioned_role ⓘ

ticket.mentioned_user ⓘ

ticket.user ⓘ

ticket.customer ⓘ

ticket.ticket_type ⓘ

ticket.company ⓘ

ticket.channel ⓘ

ticket.ticket_type.status ⓘ

ticket.article.channel ⓘ

ticket.article.visibility ⓘ

ticket.article.sender ⓘ

Receivers

Receivers *

Channels

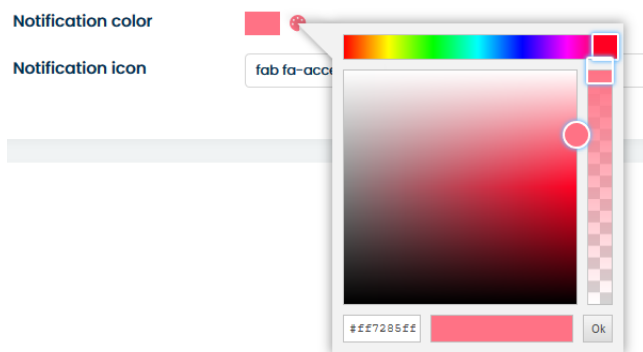
Channels *

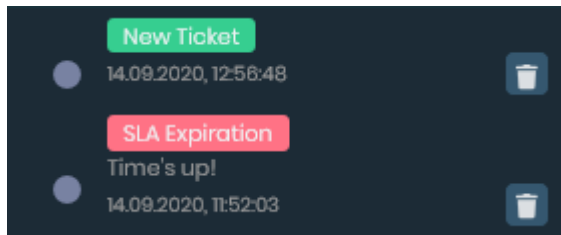
| # | Name | Action |
|---------------------------|------|--------|
| There is no data to show. | | |

Language

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.



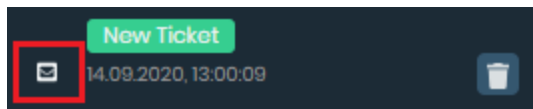


If you decide to give a notification a unique icon you need to type its name in the 'Notification icon' field.

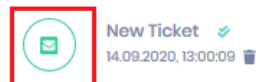
Notification icon

MINT supports icons available in [*https://fontawesome.com/icons?d=gallery*](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.



Notifications



[See previous activities →](#)

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.

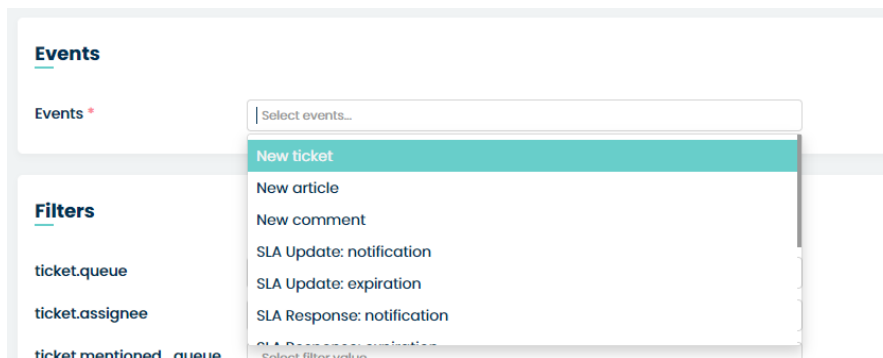
Notification status ☒

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.

Show in user profile ☐ Company user ☒ Agent ☐ Admin

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.assigned_to') 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 assigned_to' filter list.

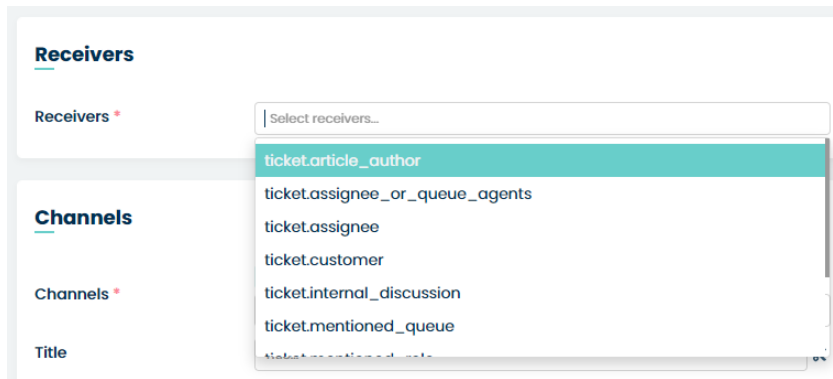
Now, if additionally, you want this notification to be sent only within the Tickets from one particular queue you can choose this queue from the 'ticket.queue' filter list.

Remember that you can add multiple values for each filter.

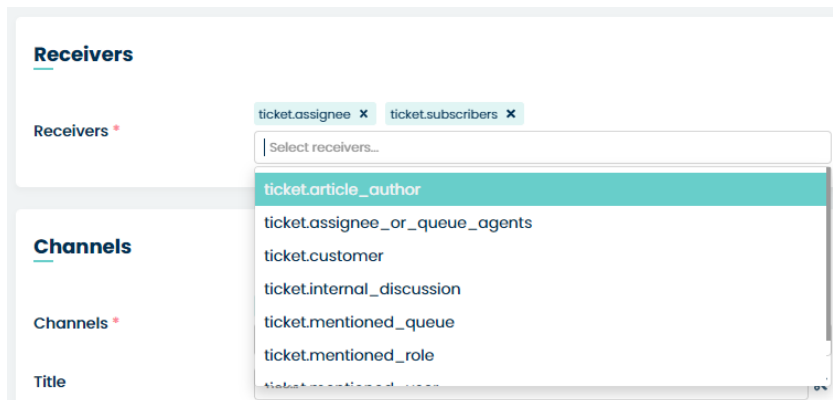
Receivers

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.assigned_to'), 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.

i The following restrictions are applied to `ticket.customer` notifications:

– "New article" notification will be sent only for non-private articles

– notifications will not be sent for events:

- New comment
- Reminder
- SLA Resolution: expiration
- SLA Resolution: notification
- SLA Response: expiration
- SLA Response: notification
- SLA Update: expiration
- SLA Update: notification

Channels

The last section of the process of creating a notification requires selecting a channel for which this particular notification will be used.

Channels

Channels *

Select channel...

#

Name

Action

There is no data to show.

Language

Choose language...

The next step will be to select the language from the dropdown list that you want to create a notification for.

#

Name

Afrikaans

English (GB)

English (US)


Español

Français

Magyar

Language

Choose language...

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.

Channels

System

Channels *

Select channel...

#

Name

Action

1

English (GB)

Edit

Delete

Language

Choose language...

Now you can delete this notification 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:’).

Channels

System ✕

Channels *

| # | Name | Action |
|---|--------------|---|
| 1 | English (GB) | Edit Delete |

Language +

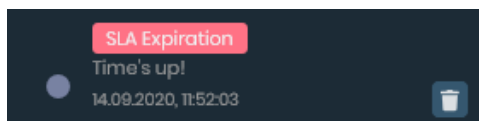
Title ✕

Template for: System

Time's up

✕

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.

Channels

System ✕

Channels *

Title ✕

Template for: System

System

Name

Current Date

Current Time

Current Date Time

Url

Customer

✕

5.10.2 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.

| # | Name | Events | Channels | Active | Action |
|---|----------------------|-----------------|---------------------|-------------------------------------|---|
| 1 | Asset Alert | Alert | System, Email, Push | <input checked="" type="checkbox"/> | Edit Delete |
| 2 | Asset Alert&Reminder | Alert, Reminder | System, Email, Push | <input checked="" type="checkbox"/> | Edit Delete |
| 3 | Asset Reminder | Reminder | System, Email, Push | <input checked="" type="checkbox"/> | Edit Delete |

Search by Name...

Navigation: Total elements: 3


10

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.

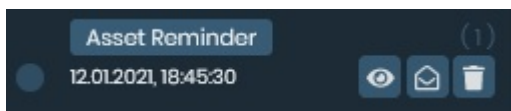
If you like, you can always add some new notifications. To do so click on the  button located on the right side of the main view.



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.

Notification icon

MINT supports icons available in [*https://fontawesome.com/icons?d=gallery*](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.

Notification status ☒

Secondly, you can choose which type of user will be able to see the notification.

Show in user profile

☐ Company user
 ☒ Agent
 ☐ Admin

Events

Here you can select one, or more, events for which the user will receive a notification.

Events

Events ⁺

- Alert
- Reminder

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).

Events

Events ⁺

Alert ☒ Reminder ☒

Filters

Here you can select some notification filters for assets.

Filters

asset.assignee ⁱ

asset.category ⁱ

For example, if you want to send notification ('Events=' Alert or Reminder) about an assets to a person assigned to an asset ('Receivers' = 'asset.assignee') 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.

Filters

asset.assignee ⁱ

MintSD Assistant ☒

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.

Filters

asset.category ⁱ

Hardware - PC/Support ☒

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.

Receivers

Receivers ⁺

- assetassignee
- assetcategory

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.

Channels

Channels *

| # | Name ▲ | Action |
|---------------------------|--------|--------|
| There is no data to show. | | |

Language +

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:').

Channels

System ×

Channels *

| # | Name ▲ | Action |
|---|--------------|---|
| 1 | English (GB) | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

Language +

Title ×

Template for: System

This is a alert for the ticket

×

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.

Channels

System ✕

Channels ✕

| # | Name | Action |
|---|--------------|---|
| 1 | English (GB) | Edit Delete |

Language

Title

Template for: System

5.10.3 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

NOTIFICATIONS
MA

General settings

Name *
Name...

Description
Description...

Show in user profile
☒ Company user ☒ Agent

Notification status
☐

Notification color
☒

Notification icon
Name...

Events

Events *
Select events...

Filters

contract.time_to_end_of_sup
port ⓘ
Select filter value...

contract.contract_type ⓘ
Select filter value...

contract.company ⓘ
Select filter value...

contract.service ⓘ
Select filter value...

Receivers

Receivers *
Select receivers...

Channels

Channels *
Select channel...

| # | Name | Action |
|---------------------------|------|--------|
| There is no data to show. | | |

Language
Choose language...

General settings

The first section is similar to that in the Ticket and Asset notifications and is described there.

General settings

Name *
Name...

Description
Description...

Show in user profile
☒ Company user ☒ Agent

Notification status
☐

Notification color
☒

Notification icon
Name...

Events

Here you can select one, or more, events for which the user will receive a notification.

Events

End of support x

Events *
Select events...

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

Filters

contract.time_to_end_of_sup
port ⓘ
Select filter value...

contract.contract_type ⓘ
Select filter value...

contract.company ⓘ
Select filter value...

contract.service ⓘ
Select filter value...

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.

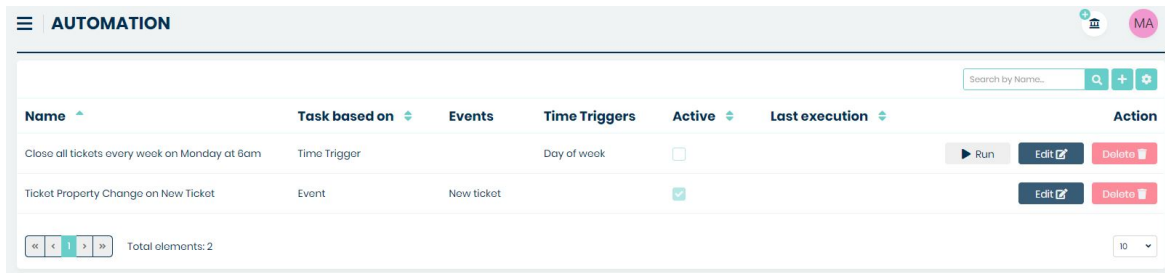
Channels

This section is similar to that in the Ticket and Asset notifications and is described there.

5.11 AUTOMATION


This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

The Automation section is used to perform actions automatically based on **Events** or **Time Trigger**.

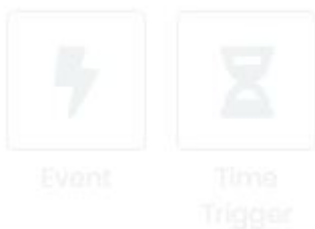


| Name | Task based on | Events | Time Triggers | Active | Last execution | Action |
|---|---------------|------------|---------------|-------------------------------------|----------------|-----------------|
| Close all tickets every week on Monday at 6am | Time Trigger | | Day of week | <input type="checkbox"/> | | Run Edit Delete |
| Ticket Property Change on New Ticket | Event | Now ticket | | <input checked="" type="checkbox"/> | | Edit Delete |

Navigation: << < 1 > >> Total elements: 2

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.

Task based on



You are presented with a choice of either Events or Time Trigger. Both configurations will be described below.

5.11.1 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.

General settings

| | |
|-------------|---|
| Name * | <input type="text" value="Name..."/> |
| Description | <input type="text" value="Description..."/> |
| Is active | <input type="checkbox"/> |

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

Events

| | |
|--------------|---|
| Event type * | <input type="text" value="Select event type..."/> <div> Ticket Article </div> |
|--------------|---|

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.

Filters *

| | |
|--|------------------------|
| ticket.assignee | Select filter value... |
| ticket.company | Select filter value... |
| ticket.customer | Select filter value... |
| ticket.queue | Select filter value... |
| ticket.service | Select filter value... |
| ticket.status | Select filter value... |
| ticket.ticket_type | Select filter value... |
| ticket.attribute_id | Select filter value... |
| ticket.first_attribute_dictionary_value | Select filter value... |
| ticket.second_attribute_dictionary_value | Select filter value... |
| ticket.article_author | Select filter value... |

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.



Filters *

| | |
|--|------------------------|
| <code>ticket.assignee</code> | Select filter value... |
| <code>ticket.company</code> | Select filter value... |
| <code>ticket.customer</code> | Select filter value... |
| <code>ticket.queue</code> | Select filter value... |
| <code>ticket.service</code> | Select filter value... |
| <code>ticket.status</code> | Select filter value... |
| <code>ticket.ticket_type</code> | Select filter value... |
| <code>ticket.attribute_id</code> | Select filter value... |
| <code>ticket.first_attribute_dictionary_value</code> | Select filter value... |
| <code>ticket.article_author</code> | Select filter value... |

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.



Actions



Actions  

Then the whole list of possible options will be displayed.

Actions

Ticket Property Change 


Company:  

Company user:  

Ticket type:

Queue:


Priority:



Of the options available for configuration are:


- Company
- Company users
- Ticket type
 - Status
- Queue

- Assignee
- Priority

Press  button to complete the automation setup process.


5.11.2 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.

Time Triggers

Period of time From every 



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.

Time Triggers

Add Trigger

Based on

Type *

Ticket



Filters

ticket.assignee

Select filter value...

ticket.company

Select filter value...

ticket.customer

Select filter value...

ticket.global_status

Select filter value...

ticket.priority

Select filter value...

ticket.queue

Select filter value...

ticket.service

Select filter value...

ticket.status

Select filter value...

ticket.ticket_type

Select filter value...

- **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 **Add action** 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.

Actions



Press **Create** button to complete the automation setup process.

5.12 EMAIL

5.12.1 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.

| ACCOUNTS | | | | | | | |
|----------|------------------------|-------------------------------|--------------|----------------------|----------------|--|--|
| | | | | | | <input type="text" value="Search by Account name, ..."/> | |
| # | Account name | Description | Channel type | Last success access | Error occurred | Action | |
| 1 | MINT SD email - Europe | MINT SD Main Channel - Europe | Email | 11.04.2023, 09:14:31 | | | |
| 2 | MINT SD email - Poland | MINT SD Main Channel - Poland | Email | 01.03.2023, 14:38:34 | | | |

Total elements: 2

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

CREATE ACCOUNT

<

+

MA

Account name*

Account name...

Description

System account

☐


Outgoing queues*

Select queues...


Incoming queue*

Select queue...


Gmail




Yahoo!




Microsoft Office 365



Other



Microsoft Graph Api



Save

CREDENTIALS

Authorization type*

☒ Credentials
 ☐ OAuth2
 ☐ Anonymous

User name*

User name...

Password*

Password...

Send server address*

Server address...

Send server port*

Server port...

Security

Security layer...

Receive protocol *

☐ POP3
 ☐ IMAP

Receive server address*

Server address...

Receive server port*

Server port...

Security

Security layer...

Main address*

Main address...


Additional addresses

Additional addresses...

* - fields required

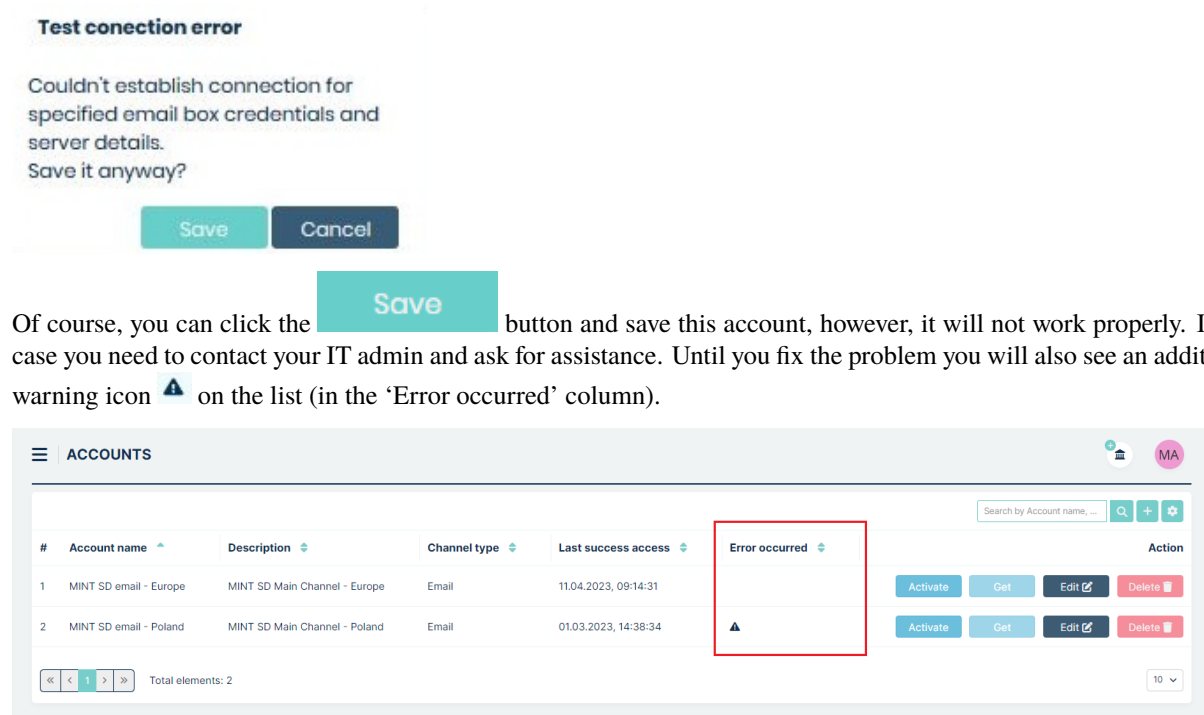
Save



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*](mailto: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. In 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'.

Authorization type* ☐ Credentials ☒ OAuth2

Redirect Uri
<https://rcmintsd.opqksoftware.com/admin/channels/accounts/create>

Client id*

Client secret*

Authorization server*

Access token server*

Scopes*

Send server address*

Send server port*

Security

Receive protocol* ☐ POP3 ☒ IMAP

Receive server address*

Receive server port*

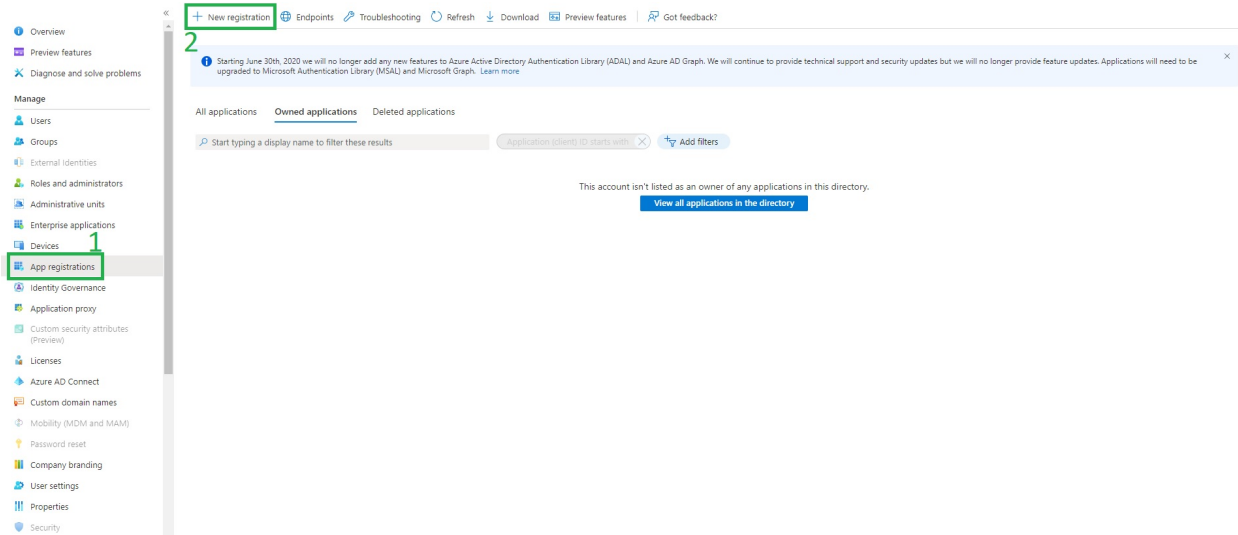
Security

Email address*

Additional addresses

* - fields required

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.

Register an application ...

* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?


- ☐ Accounts in this organizational directory only (OPGK RZESZÓW S.A. only - Single tenant)
☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
☒ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
☐ Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

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'


Application name
✎ ...

<<
🗑️ Delete
🌐 Endpoints
🔍 Preview features

🏠 Overview
👤 Quickstart
🚀 Integration assistant

Manage

🎨 Branding
🔑 Authentication
🔑 Certificates & secrets

Essentials

Display name : Application name

Application (client) ID : a7c2b9d7-████████████████████






Object ID : ████████████████████████████████

Directory (tenant) ID : ████████████████████████████████

Supported account types : [All Microsoft account users](#)

ℹ️ Got a second? We would love your feedback on Microsoft identity platform

The copied code, the user must paste into the mint configuration in the 'Client id' field.

Gmail
Yahoo!
Microsoft Office 365
Other
Microsoft Graph Api

Authorization type*
☐ Credentials
☒ OAuth2

Redirect Uri
<https://rcmintsd.opgksoftware.com/admin/channels/accounts/create>

Client id*
a7c2b9d7-████████████████████

Client secret*

Authorization server*

Access token server*

Scopes*

Send server address*

Send server port*

Security

Receive protocol*
☐ POP3
☒ IMAP

Receive server address*

Receive server port*

Security

Email address*

Additional addresses

* - fields required

Save

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.

Application name | API permissions ✨ ...

Search (Ctrl+/) << Refresh Got feedback?

Overview
Quickstart
Integration assistant

Manage

Branding
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Owners
Roles and administrators | Preview
Manifest

Starting November 9th, 2020 end users will no longer be able to grant consent to newly registered multitenant apps without verified publishers. [Add MPN ID to verify publisher](#)

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission Grant admin consent for OPGK RZESZÓW S.A.

| API / Permissions name | Type | Description | Admin consent requ... | Status |
|------------------------|-----------|-------------------------------|-----------------------|--------|
| Microsoft Graph (1) | | | | ... |
| User.Read | Delegated | Sign in and read user profile | No | ... |

To view and manage permissions and user consent, try [Enterprise applications](#).

After pressing the button, press the 'Microsoft Graph' option.

Request API permissions



Select an API

Microsoft APIs

APIs my organization uses

My APIs

Commonly used Microsoft APIs

**Microsoft Graph**

Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

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Programmatic access to Dynamics ERP data

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**Intune**

Programmatic access to Intune data

**Office 365 Management APIs**

Retrieve information about user, admin, system, and policy actions and events from Office 365 and Azure AD activity logs

Select 'Delegated permissions' and check these options: - IMAP.AccessAsUser.All - SMTP.Send - offline_access

And then press the 'Add permissions' button.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for OPGK RZESZÓW S.A.

| API / Permissions name | Type | Description | Admin consent requ... | Status |
|------------------------|-------------|---|-----------------------|---------------------------------|
| ▼ Microsoft Graph (6) | | | | |
| IMAP.AccessAsUser.All | Delegated | Read and write access to mailboxes via IMAP. | No | ... |
| Mail.Read | Application | Read mail in all mailboxes | Yes | ⚠ Not granted for OPGK R... ... |
| Mail.ReadWrite | Application | Read and write mail in all mailboxes | Yes | ⚠ Not granted for OPGK R... ... |
| Mail.Send | Application | Send mail as any user | Yes | ⚠ Not granted for OPGK R... ... |
| offline_access | Delegated | Maintain access to data you have given it access to | No | ... |
| SMTP.Send | Delegated | Send emails from mailboxes using SMTP AUTH. | No | ... |

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.

Overview

Quickstart

Integration assistant

Manage

Branding

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

Owners

Roles and administrators | Preview

Manifest

Support + Troubleshooting

Troubleshooting

New support request

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

| Description | Expires | Value ⓘ | Secret ID |
|---|---------|---------|-----------|
| No client secrets have been created for this application. | | | |

Add a description and press the 'Add' button.

Add a client secret

Description

Enter a description for this client secret

Expires

Recommended: 6 months

Add

Cancel

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.

Certificates (0) Client secrets (1) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

| Description | Expires | Value | Secret ID |
|--------------------------------------|-----------|------------------|------------|
| Password uploaded on Thu Jan 13 2022 | 7/13/2022 | GBx7Q~[REDACTED] | [REDACTED] |

The copied value should be pasted into the MINT configuration in the 'Client secret' field.

Authorization type* ☐ Credentials ☒ OAuth2

Redirect URI* <https://rcmintsd.opqksoftware.com/admin/channels/accounts/create>

Client id* [REDACTED]

Client secret* [REDACTED]

Authorization server* <https://login.microsoftonline.com/common/oauth2/v2.0/authorize>

Access token server* <https://login.microsoftonline.com/common/oauth2/v2.0/token>

Scopes* <https://outlook.office.com/IMAP.AccessAsUser.All>; <https://outlook.office.com/SMTP.Send>; offline_access

Send server address* smtp.office365.com

Send server port* 587 Security StartTLS

Receive protocol* ☐ POP3 ☒ IMAP

Receive server address* outlook.office365.com

Receive server port* 993 Security SSL/TLS

Email address* Email address... Additional addresses Additional addresses...

* - fields required

Save

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 necessary to add this additional redirect URL to your settings in Azure portal (or any other portal you are using to configure OAUTH2 connection)

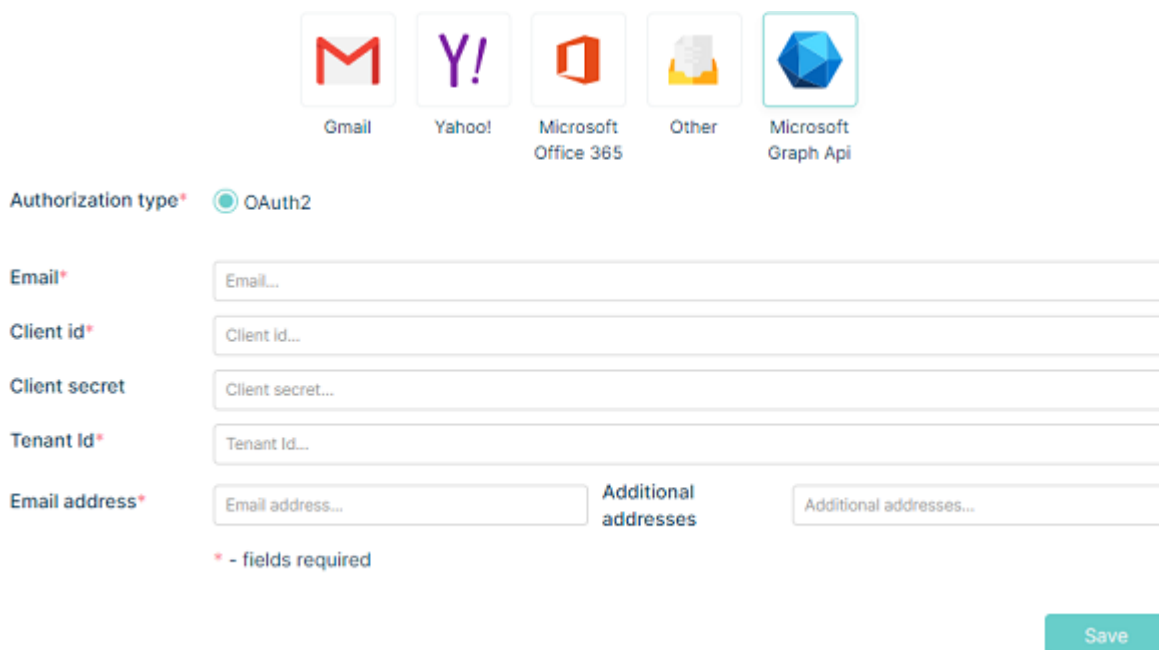
The sample Redirect URL can look like this below:

Redirect Uri `http://localhost:10100/admin/channels/accounts/edit/d2331b5d-a280-40a6-87a8-f2d73e3f9200`

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.

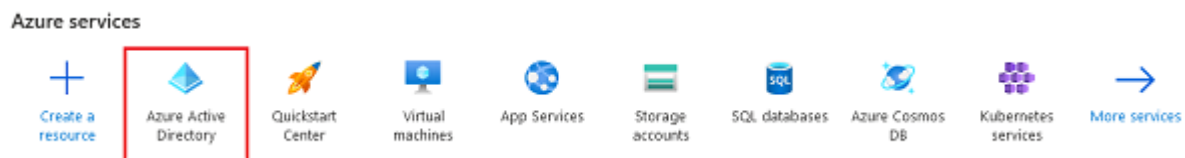
MICROSOFT GRAPH API

After pressing this button, a form will pop up:

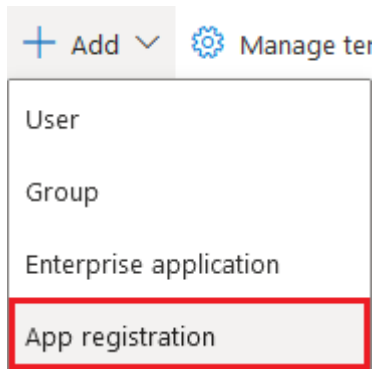


The screenshot shows a configuration form for an OAuth2 provider. At the top, there are five icons representing different providers: Gmail, Yahoo!, Microsoft Office 365, Other, and Microsoft Graph Api. The 'Microsoft Graph Api' icon is selected. Below the icons, the 'Authorization type' is set to 'OAuth2'. The form includes several input fields: 'Email*', 'Client id*', 'Client secret', 'Tenant id*', 'Email address*', and 'Additional addresses'. Each field has a placeholder text. A note at the bottom states '* - fields required'. A 'Save' button is located at the bottom right of the form.

First go to <https://portal.azure.com> Sign in and go to **Azure Active Directory** services.



Go to "App" and 'App registration'



The following form will appear.

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Single tenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

▼

e.g. <https://myapp.com/auth>

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

Display name : [Azure test](#)

Application (client) ID : [REDACTED]

Object ID : [REDACTED]

Directory (tenant) ID : [REDACTED]

Supported account types : [My organization only](#)

Paste them here:



Authorization type* ☒ OAuth2

Email*

Client id*

Client secret


Tenant id*


Email address* **Additional addresses**

* - fields required

Save

After the registration go to the **API permissions** tab

 Add a permission

Press the  button. Then, from the window that slides out on the right side of the screen, select the “Microsoft Graph” option.

Request API permissions



Select an API

Microsoft APIs

APIs my organization uses

My APIs

Commonly used Microsoft APIs

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Programmatic access to Dynamics ERP data

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Embed flow templates and manage flows

**Intune**

Programmatic access to Intune data

**Office 365 Management APIs**

Retrieve information about user, admin, system, and policy actions and events from Office 365 and Azure AD activity logs

From the two available options, select the one on the right - Application permissions

Request API permissions



[← All APIs](#)



Microsoft Graph

<https://graph.microsoft.com/> [Docs](#) [↗](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application runs as a background service or daemon without a signed-in user.

In the Mail section, select the following options:

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

[+ Add a permission](#) ☒ Grant admin consent for OPGK RZESZÓW S.A.

| API / Permissions name | Type | Description | Admin consent requ... | Status |
|--|-------------|---|-----------------------|--|
| ▼ Microsoft Graph (6) ... | | | | |
| IMAP.AccessAsUser.All | Delegated | Read and write access to mailboxes via IMAP. | No | ... |
| Mail.Read | Application | Read mail in all mailboxes | Yes | ⚠ Not granted for OPGK R... ... |
| Mail.ReadWrite | Application | Read and write mail in all mailboxes | Yes | ⚠ Not granted for OPGK R... ... |
| Mail.Send | Application | Send mail as any user | Yes | ⚠ Not granted for OPGK R... ... |
| offline_access | Delegated | Maintain access to data you have given it access to | No | ... |
| SMTP.Send | Delegated | Send emails from mailboxes using SMTP AUTH. | No | ... |

To save the rights, press the **Add permissions** button.

There is a possibility that you will encounter such a situation:

| | |
|-------------------------------------|-----|
| Status | ... |
| ⚠ Not granted for OPGK RZESZÓW S.A. | ... |
| ⚠ Not granted for OPGK RZESZÓW S.A. | ... |
| ⚠ Not granted for OPGK RZESZÓW S.A. | ... |
| ... | ... |

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


```

PS C:\Windows\system32> Set-ExecutionPolicy RemoteSigned

Execution Policy Change
The execution policy helps protect you from scripts that you do not trust. Changing the execution policy might expose
you to the security risks described in the about_Execution_Policies help topic at
https://go.microsoft.com/fwlink/?LinkID=135170. Do you want to change the execution policy?
[Y] Yes [A] Yes to All [N] No [L] No to All [S] Suspend [?] Help (default is "N"): Y
PS C:\Windows\system32>
PS C:\Windows\system32> Import-Module ExchangeOnlineManagement
PS C:\Windows\system32>

```

- Login to the Exchange Online Powershell (a login pop-up will prompt out)

Connect-ExchangeOnline -UserPrincipalName {your-admin-account@your-domain.com}

```

Administrator: Windows PowerShell
Windows PowerShell
Copyright (C) Microsoft Corporation. All rights reserved.

PS C:\Windows\system32> Connect-ExchangeOnline -UserPrincipalName [redacted]@opgksoftware.com

-----
The module allows access to all existing remote PowerShell (V1) cmdlets in addition to the 9 new, faster, and more reliable cmdlets.
-----
|-----|
| Old Cmdlets | New/Reliable/Faster Cmdlets |
|-----|
| Get-CASMailbox | Get-EXOCASMailbox |
| Get-Mailbox | Get-EXOMailbox |
| Get-MailboxFolderPermission | Get-EXOMailboxFolderPermission |
| Get-MailboxFolderStatistics | Get-EXOMailboxFolderStatistics |
| Get-MailboxPermission | Get-EXOMailboxPermission |
| Get-MailboxStatistics | Get-EXOMailboxStatistics |
| Get-MobileDeviceStatistics | Get-EXOMobileDeviceStatistics |
| Get-Recipient | Get-EXOREcipient |
| Get-RecipientPermission | Get-EXOREcipientPermission |
|-----|

To get additional information, run: Get-Help Connect-ExchangeOnline or check https://aka.ms/exops-docs

Send your product improvement suggestions and feedback to exocmdletpreview@service.microsoft.com. For issues related to the module, contact Microsoft support. Don't use the feedback alias for problems or support issues.
-----

```

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.

[+ New client secret](#)

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.

Add a client secret



Description

Graph Api

Expires

Recommended: 6 months



Add

To approve the operation press the button.

After saving, copy **Value**.

[+ New client secret](#)

| Description | Expires | Value | Secret ID |
|-------------|-----------|-------------|-------------|
| Graph Api | 2/17/2023 | <div></div> | <div></div> |

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



Gmail



Yahoo!



Microsoft
Office 365



Other



Microsoft
Graph Api

Authorization type* ☒ OAuth2

Email*

Email...

Client id*

Client id...

Client secret

Client secret...

Tenant id*

Tenant id...

Email address*

Email address...

Additional
addresses

Additional addresses...

* - fields required

Save

The configuration should look similar to this:

CREATE ACCOUNT

Account name* [redacted]@opgksoftware.com

Description [redacted]@opgksoftware.com

System account ☒

Outgoing queues* Q3 x

Incoming queue* Q3

Gmail
 Yahoo!
 Microsoft Office 365
 Other
 Microsoft Graph Api

Authorization type* ☒ OAuth2

Email* [redacted]@opgksoftware.com

Client id* [redacted]


Client secret [redacted]

Tenant Id* [redacted]

Email address* [redacted]@opgksoftware.com Additional addresses [redacted]

* - fields required

Save

To save the mailbox configuration press the  button.

5.12.2 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.

EMAIL FILTERS

Please select fields to see [redacted]

| # | Email | Action |
|---|-----------------|--------|
| 1 | offers@spam.com | Delete |

10

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.

Create filter

Email to be blocked...

Cancel

Create

Type the address and click ‘Create’. You will see a new position with this address on the general list.

5.12.3 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.

MESSAGE FILTERS

Search by Name, Order...

| # | Order | Name | Stop after match | Action |
|---|-------|------------------------|-------------------------------------|-----------------------|
| 1 | 1 | Malfunctions - reports | <input type="checkbox"/> | <div>EditDelete</div> |
| 2 | 2 | Laptops - problems | <input checked="" type="checkbox"/> | <div>EditDelete</div> |

«

<


1

>

»

Total elements: 2

10

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.

#

Message element *

Operation type *

Match case

Element value *

1

Type...

Operation...

☐

Value...

☐ All conditions are met

☐ One of the conditions is met *

First, select the “Message Element” – it is the part of the email you want to filter. You can choose between ‘Body’, ‘Subject’, ‘From’, ‘To’ and ‘Received mailbox account’.

Message element *

Type...

Body

Subject

From

To

Received mailbox account

Now, choose one ‘Operation type’ – it includes options to get the match and fit of your filters like: “Contains”, “StartsWith”, “EndsWith”, “IsEqual” and “MatchPattern”.

Operation type

Match case

Operation...

Contains

StartsWith

EndsWith

IsEqual

MatchPattern

☐

For each of the criteria, you can select the ‘Match case’ check-box. It is related to the ‘Stop after match’ option mentioned before.

Finally, “Element Value” is the field where you must put which value exactly you want to match. You can type anything you want here.

Element value

Value...

+

If you want to add additional criteria you can use the  button located in the bottom right corner. If you want to delete any, just use the  button.

| | |
|-------------------------|--|
| Order * | <input type="text" value="Order..."/> |
| Name * | <input type="text" value="Name..."/> |
| Queue | <input type="text" value="Select queue..."/> |
| Ticket type | <input type="text" value="Select ticket type..."/> |
| Status | <input type="text" value="Select status type..."/> |
| Assignee | <input type="text" value="Select agent..."/> |
| Priority | <input type="text" value="Select priority..."/> |
| Service | <input type="text" value="Select service..."/> |
| Stop after match | <input type="checkbox"/> |

* - fields required

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.

Once you finish click the  button in order to save your new message filter.

The following screen shows a new filter ready to be saved.

CREATE FILTER

Message element * Operation type * Match case Element value *

| # | Message element * | Operation type * | Match case | Element value * |
|---|-------------------|------------------|-------------------------------------|-----------------|
| 1 | Subject | Contains | <input checked="" type="checkbox"/> | Help |
| 2 | Subject | StartsWith | <input type="checkbox"/> | Support |

☐ All conditions are met ☒ One of the conditions is met *

Name * Subject filter

Queue Poland - Support

Ticket type Problems

Status Select status type...

Assignee Select agent...

Priority Select priority...

Service Select service...

Stop after match ☒

* - fields required

As a name we typed 'Subject filter', we also selected a 'Poland - support' queue and chose 'Problem Ticket type'.

We have two cases here:

- First one means that when an email subject contains the word "Help" a new Ticket will be created in 'Poland - support' queue and receive a 'Problem' Ticket Type

1 Subject Contains ☒ Help

- Second one means that when an email subject starts from the "Support" word a new Ticket will be created in 'Poland - support' queue and receive a 'Problem' Ticket Type.

2 Subject StartsWith ☐ Support

The first criteria have also a 'Match case' check-box selected. Because we also selected 'Stop after match' it means that when the email Subject contains "Help" the second criteria (Starts with "Support") won't need to be fulfilled to allow the filter to create a new ticket in the selected queue and with selected ticket type.

Remember that after creating a new message filter you can always either change anything inside (

Edit

button) or even delete it from the system (

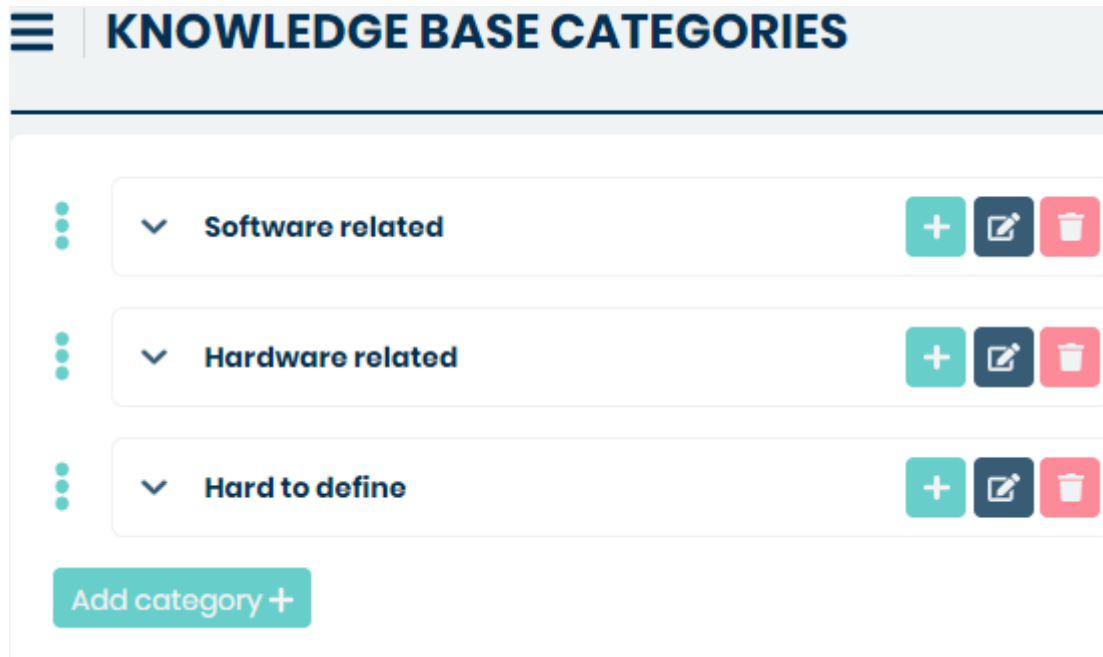
Delete

button).

5.13 KNOWLEDGE BASE

5.13.1 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.


  

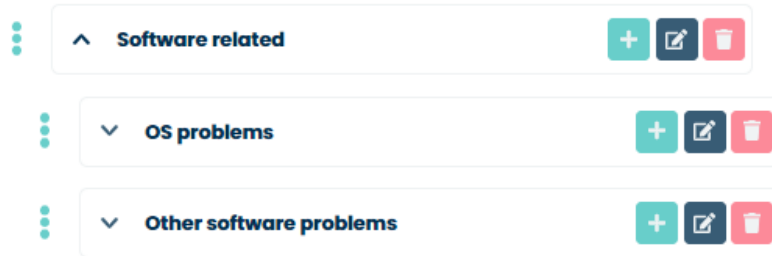
Type the name for the category and either click the  button or confirm the name by pressing 'Enter' on your keyboard.



 ▼ **Software related**   

Once a new category has been created, you can do several things with it.

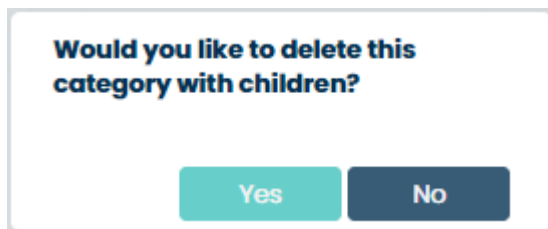
The first one is that you can add a sub-category by clicking the  button and adding a sub-category in the same way as you did it with the main one.


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.










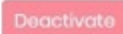

In order to delete a category, click on the  button, and in the new window click 'Yes'.



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.

5.14 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.

| SURVEYS + MA | | | | |
|---|--|--------------------------|--|---|
| Search by Name, Descri...    | | | | |
| # | Name  | Description | Is active?  | Action |
| 1 | Help | Was our answer helpful? |  |   |
| 2 | Product | Do you like our product? |  |   |

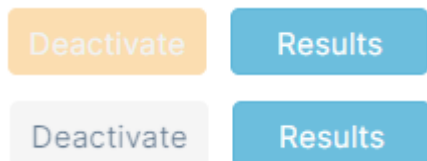
If you want to create a new survey, you need to click on  button, located on the right side of the search box.



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.

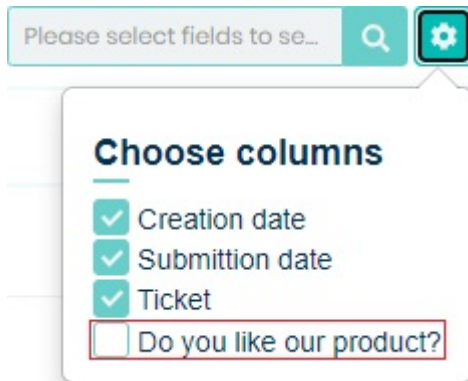
Now, with a newly created survey, as well as any other, you can do a couple of things. First, you can 'Deactivate' the survey. Deactivating means that the survey will be locked and not available to use.



Second, if you want to see results of the survey, you need to click on  button, located next to 'Deactivate' button.

| # | Creation date | Submission date | Ticket |
|---|----------------------|----------------------|------------------|
| 1 | 12.01.2021, 11:36:48 | 12.01.2021, 11:36:56 | Software problem |

In this view you can see 'Creation date', 'Submission 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 | Submission date | Ticket | Do you like our product? |
|---|----------------------|----------------------|------------------|--------------------------|
| 1 | 12.01.2021, 11:36:48 | 12.01.2021, 11:36:56 | Software problem | Yes |

5.15 LOGS

5.15.1 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.

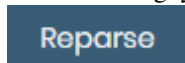


Like it was mentioned before (in Email > Accounts) those messages can be force downloaded by using the



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.

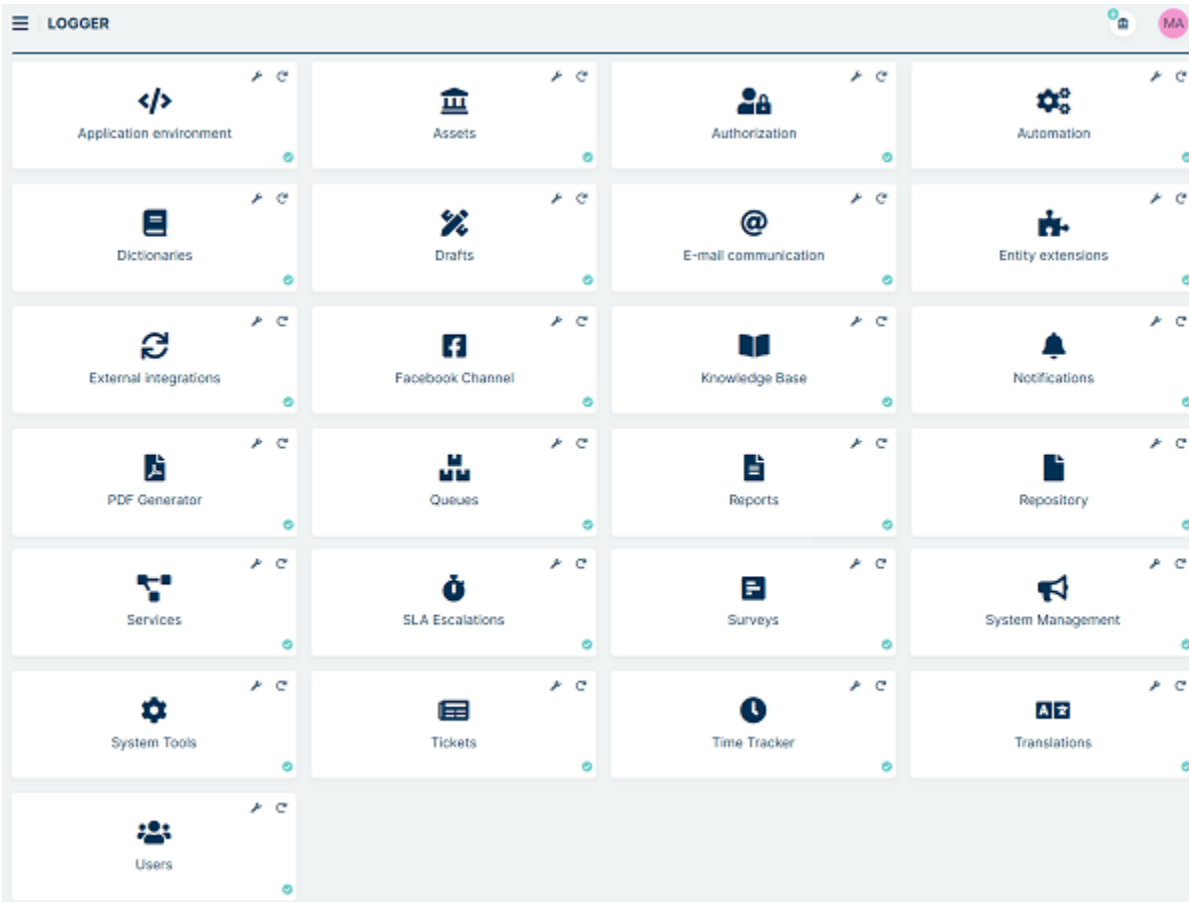
Basically, the 'Reparse' is used in case there are any problems with downloaded messages. One of those problems can be when a system downloaded the message and put it in the 'Messages' sections, but a new Ticket has not been created.

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.

5.15.2 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.





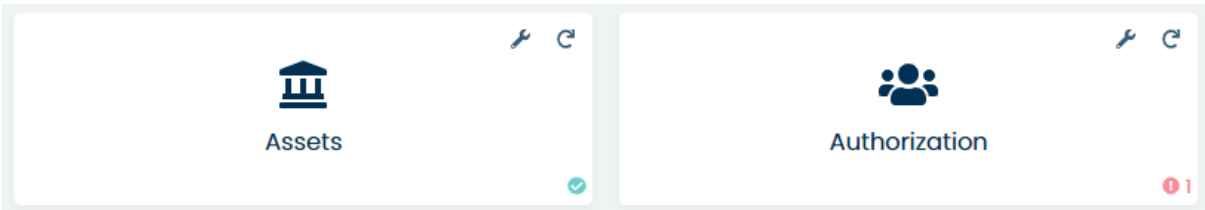
The logs are divided into 25 different sections:


- ‘Application environment’,
- ‘Assets’,
- ‘Authorization’,
- ‘Automation’,
- ‘Dictionaries’,
- ‘Drafts’,
- ‘E-mail communication’,
- ‘Entity extensions’,
- ‘External Integrations’,
- ‘Knowledge Base’,

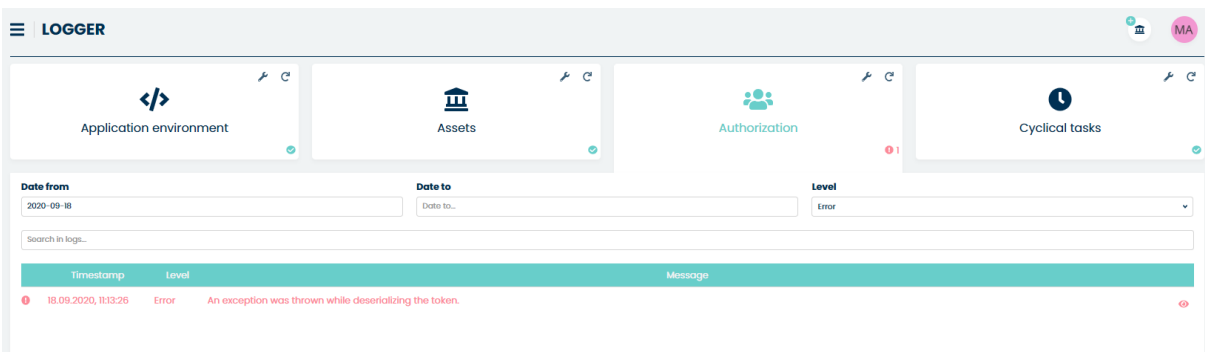
- ‘Notifications’,
- ‘PDF Generator’,
- ‘Queues’,
- ‘Reports’,
- ‘Repository’,
- ‘Services’,
- ‘SLA Escalation’,
- ‘Surveys’,
- ‘System Management’,
- ‘System Tools’,
- ‘Tickets’,
- ‘Time Tracker’,
- ‘Translations’,
- ‘Users’.


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.

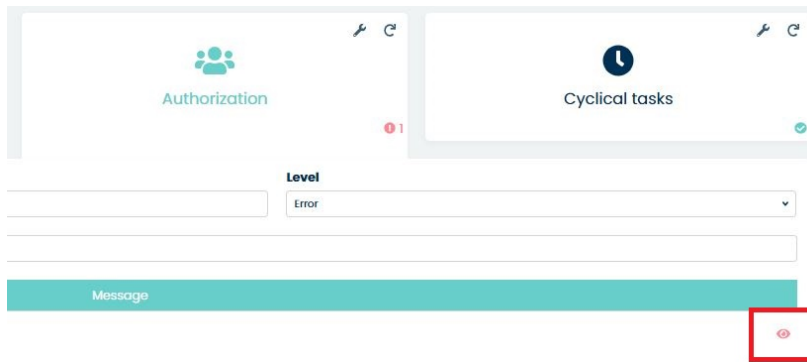
On the right bottom corner of each, you can easily check if everything is okay or if there are any problems. You will see either the  or . The first one means that everything is in order, while the second one tells you that there is a particular number of problems here.




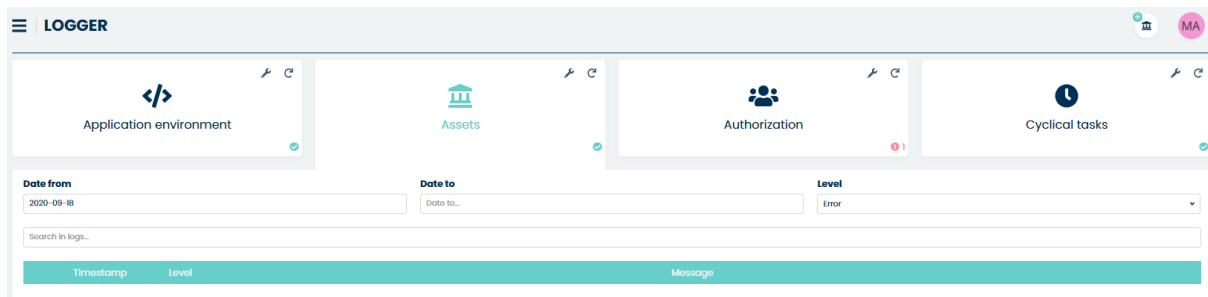
Now, if you click on the  icon the section will expand, and you will see the list of those errors.



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”.

Date from **Date to**

Now choose the ‘Level’ of logs you are looking for. You can choose between “Verbose”, “Debug”, “Information”, “Warning”, “Error” and “Fatal”.

Level

- Verbose
- Debug
- Information
- Warning
- Error**
- 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.

error

| Timestamp | Level | Message |
|----------------------|-------|--|
| 18.09.2020, 11:13:26 | Error | An exception was thrown while deserializing the token. |

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.

error

| Timestamp | Level | Message |
|----------------------|-------|--|
| 18.09.2020, 11:13:26 | Error | An exception was thrown while deserializing the token. |

Download

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.

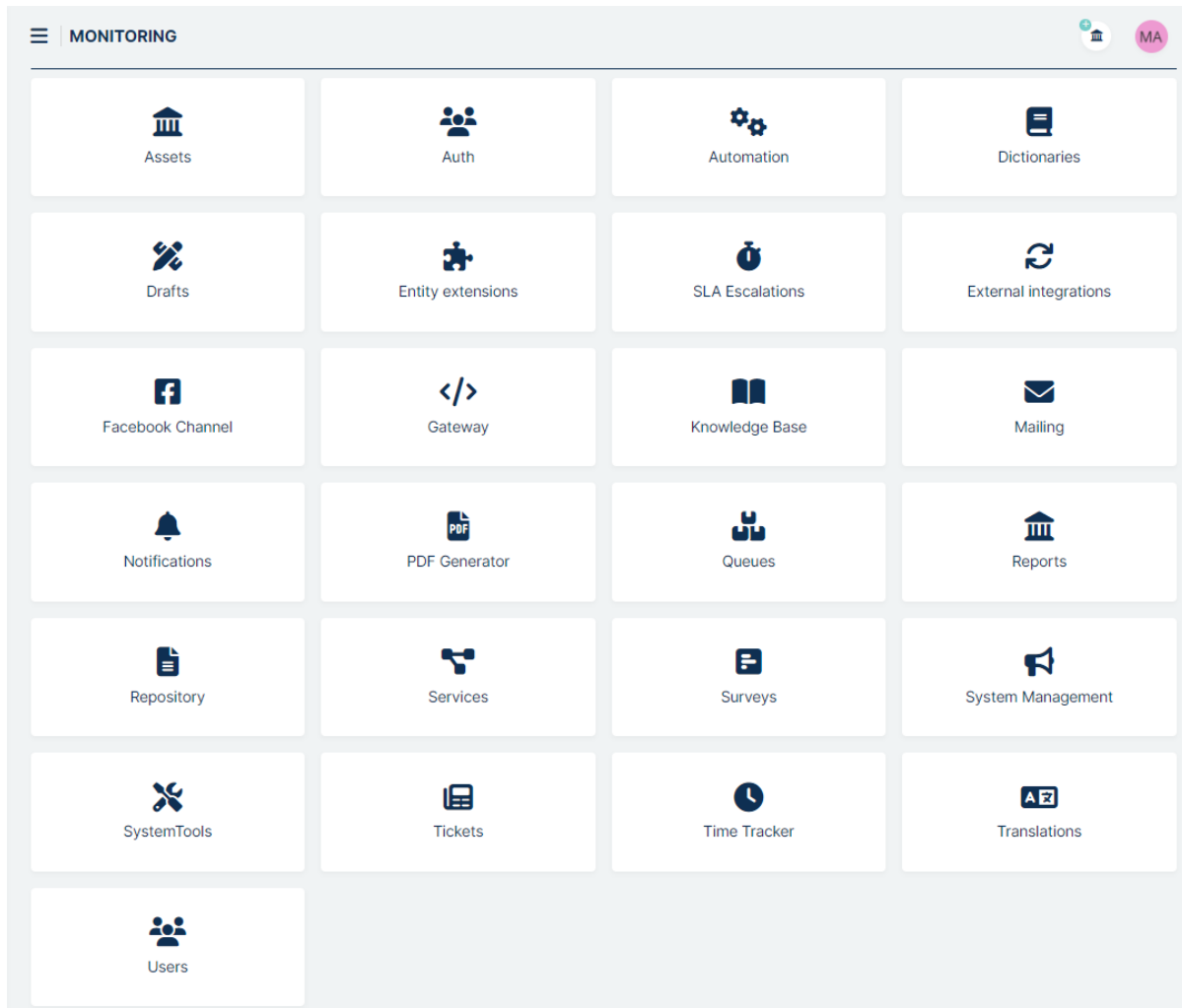
▼ Logs

| Search in logs... |
|-------------------|
| log20200918 |

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.

5.15.3 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.

The screenshot shows the MintSD interface with four main sections: Assets, Auth, Automation, and Dictionaries. Below these is a 'Service information' section for the 'Assets' service, followed by a search bar and a table of system information.

Service information

| | |
|-------------|----------------------------|
| Type | Assets |
| Name | Assets |
| Description | Assets service description |

Search in informations... Select Scope ×

| Scope | Key | Value |
|--------|-------------------------------------|---|
| Common | Framework description | .NET Core 4.6.30411.01 |
| Common | Framework version | 4.0.30319.42000 |
| Common | Net Core version | 2.1.30 |
| Common | OS Architecture | X64 |
| Common | OS Description | Linux 4.15.0-189-generic #200-Ubuntu SMP Wed Jun 22 19:53:37 UTC 2022 |
| Common | Process architecture | X64 |
| Common | Process id | 1 |
| Common | Service start time (universal time) | 08/09/2022 00:17:37 |

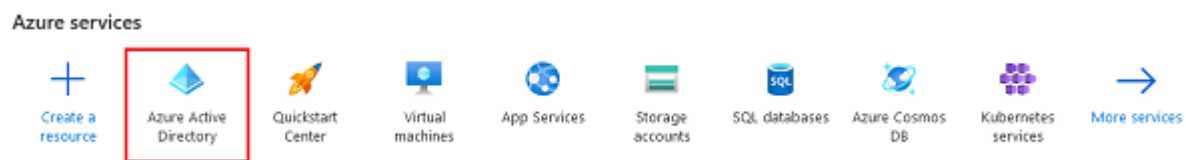
5.16 AUTHENTICATION BACKENDS

This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

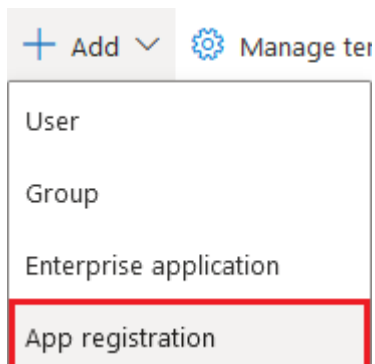
In this section you can configure your OpenID Providers and LDAP.

5.16.1 AZURE AD

First go to <https://portal.azure.com> Sign in and go to **Azure Active Directory** services.



Go to “App” and ‘App registration’



The following form will appear.

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (██████████ - Single tenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant)
- ☐ Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Web

▼

e.g. https://myapp.com/auth

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**

Implicit grant

Allows an application to request a token directly from the authorization endpoint. Checking Access tokens and ID tokens is recommended only if the application has a single-page architecture (SPA), has no back-end components, does not use the latest version of MSAL.js with auth code flow, or it invokes a web API via JavaScript. ID Token is needed for ASP.NET Core Web Apps. [Learn more about the implicit grant flow](#)

To enable the implicit grant flow, select the tokens you would like to be issued by the authorization endpoint:

☐ Access tokens

☒ ID tokens

Go to **Token Configuration** tab.

Click on **Add optional claim**.

Check **ID** token type and **email**, **given_name**, **family_name** claims.

Add optional claim ×

Once a token type is selected, you may choose from a list of available optional claims.

* Token type

Access and ID tokens are used by applications for authentication. [Learn more](#)

- ☒ ID
☐ Access
☐ SAML

| <input checked="" type="checkbox"/> Claim ↑↓ | Description |
|---|---|
| <input type="checkbox"/> acct | User's account status in tenant |
| <input type="checkbox"/> auth_time | Time when the user last authenticated; See OpenID Con... |
| <input type="checkbox"/> cty | User's country |
| <input checked="" type="checkbox"/> email | The addressable email for this user, if the user has one |
| <input type="checkbox"/> enfpolids | Enforced policy IDs; a list of the policy IDs that were eval... |
| <input checked="" type="checkbox"/> family_name | Provides the last name, surname, or family name of the ... |
| <input type="checkbox"/> fwd | IP address |
| <input checked="" type="checkbox"/> given_name | Provides the first or "given" name of the user, as set on t... |
| <input type="checkbox"/> home_oid | For guest users, the object ID of the user in the user's ho... |
| <input type="checkbox"/> in_corp | Signals if the client is logging in from the corporate net... |
| <input type="checkbox"/> ipaddr | The IP address the client logged in from |
| <input type="checkbox"/> onprem_sid | On-premises security identifier |


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.

Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

| + New client secret | | | |
|-------------------------------------|-----------|-------------|---|
| Description | Expires | Value | |
| Mint SD secret | 7/10/2021 | <div></div> |  |

In the **Authentication Backends** section go to **OpenID Providers** click on  button, the following form will appear.



CREATE PROVIDER

Name *

Description

Scheme *

Type *

Client id *

Client secret *

Groups claim

[Create](#)

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 ('Certificates & secrets' tab)
- in **Client id** field paste the value from registered app overview

Display name : Mint SD

Application (client) ID :  

Directory (tenant) ID : 

Object ID : 

- in **Tenant Id** field paste the value from registered app overview

Display name : Mint SD

Application (client) ID :  


Directory (tenant) ID : 

Object ID : 

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**

Commonly used Microsoft APIs



Microsoft Graph
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

- select **Delegated permission** and check **email** and **profile**

Request API permissions

[← All APIs](#)


Microsoft Graph

<https://graph.microsoft.com/>
[Docs](#)

What type of permissions does your application require?

Delegated permissions

Your application needs to access the API as the signed-in user.

Application permissions

Your application needs to access the API as the signed-in user.

Select permissions

Start typing a reply url to filter these results

| Permission | |
|-------------------------------------|--|
| OpenId permissions (2) | |
| <input checked="" type="checkbox"/> | email ⓘ View users' email address |
| <input type="checkbox"/> | offline_access ⓘ Maintain access to data you have given it access to |
| <input type="checkbox"/> | openid ⓘ Sign users in |
| <input checked="" type="checkbox"/> | profile ⓘ View users' basic 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**.

Edit groups claim

i Adding the groups claim applies to Access, ID, and SAML token

Select group types to include in Access, ID, and SAML tokens.

- ☒ Security groups
- ☒ Directory roles
- ☒ All groups (includes distribution lists but not groups assigned to the application)
- ☒ Groups assigned to the application

Customize token properties by type

▼ ID

▼ Access

▼ SAML

5.17 NOTICES




Here you can set the admin notifications that will be visible at the top of the page.

| NOTICES | | | | | |
|--|----------------------------------|-------------------------------------|---------------------|---------------------|---------------------------------------|
| Scheduled maintenance August 1-3 Show details | | | | | |
| # | Title | Active | Valid from | Valid to | Action |
| 1 | Scheduled maintenance August 1-3 | <input checked="" type="checkbox"/> | 06.08.2021 00:00:01 | 03.08.2021 16:00:00 | Edit Delete |
| <div> 1 2 3 4 5 </div> <div> Total elements: 1 </div> | | | | | |

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.


CREATE NOTICE



Title*

Active
☒

Content

Font Size Header

B *I* U ~~S~~ ^{X₁} ^{X₁} “ ” ↵ ↻ ↺ ↻

[List Icons]

Receivers*

Agent x Customer x roles.viewer x

Companies*

Valid from*

Valid to*

Sensitivity*
☒ Info
 ☐ Warning
 ☐ Danger

Display mode*

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.

| | |
|----------------------|---|
| Title* | <input type="text" value="Title..."/> |
| Active | <input checked="" type="checkbox"/> |
| Content | <div>Font ▼ Size ▼ Header ▼</div> <div> B <i>I</i> <u>U</u> X_i Xⁱ ¶ ↻ 🔍 ⚙️ </div> <div> ☰ ☷ ≡ ≡ ≡ ≡ ≡ ≡ ≡ </div> <div>🔗 🌐 📄</div> <div><div></div></div> |
| Receivers* | <div>Agent ✕ Customer ✕ rolesreviewer ✕</div> <input type="text" value="Receivers..."/> |
| Companies* | <input type="text" value="Companies..."/> |
| Valid from* | <input type="text" value="Valid from..."/> |
| Valid to* | <input type="text" value="Valid to..."/> |
| Sensitivity* | <input checked="" type="radio"/> Info <input type="radio"/> Warning <input type="radio"/> Danger |
| Display mode* | <input type="text" value="Always visible"/> ▼ |

Effect

Scheduled maintenance August 1-3 [Show details](#)

Scheduled maintenance August 1-3

Scheduled maintenance August 1-3

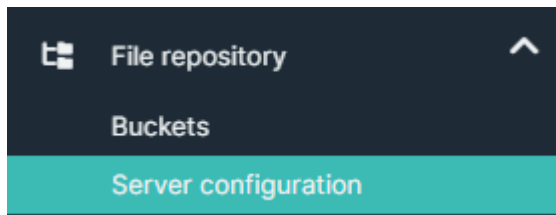
Close


5.18 FILE REPOSITORY

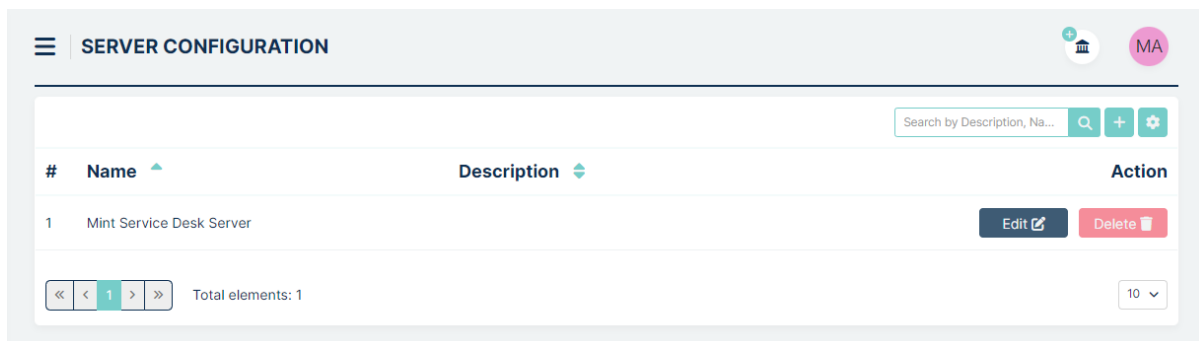
File Repository is a place for the orderly storage of “MINT” application documents. Each user level has different options for dealing with files from the repository. The administrator can create “Buckets” - containers that store files, upload, download, delete files and configure servers where files 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.

5.18.1 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
- **Address** – server address 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:

Edit 

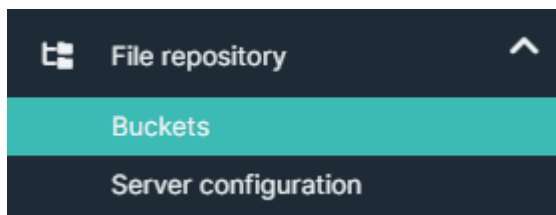
- to make changes to the existing server and

Delete 

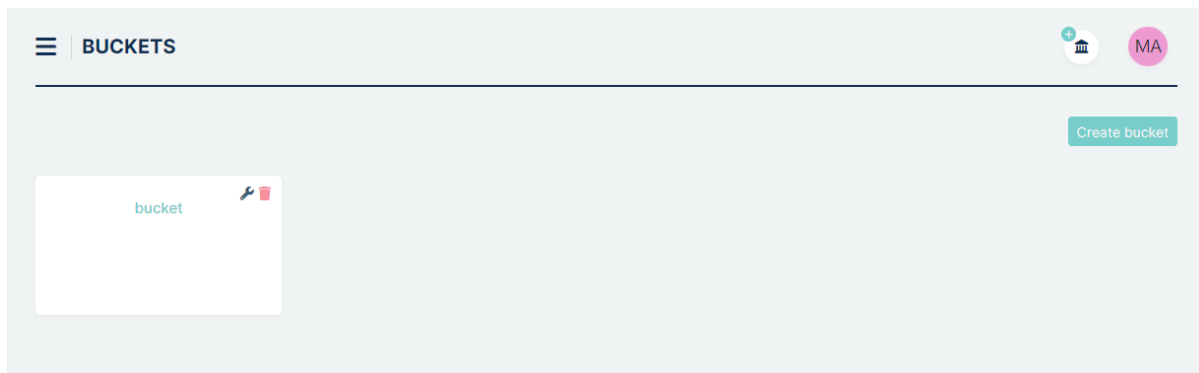
- to remove an unnecessary server.

5.18.2 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:

Title*

Description

Configuration


Cancel



Save

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

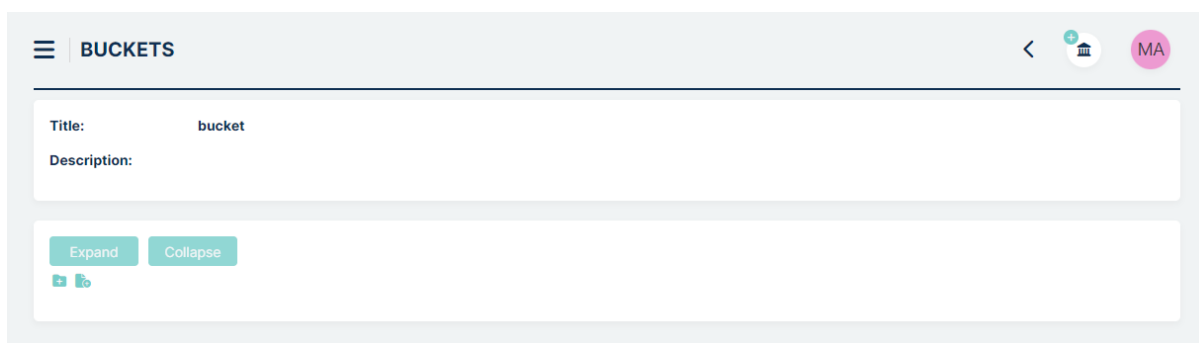
After filling all fields and clicking  button, a bucket appears. We can always edit bucket (by clicking


on the  icon) or delete (by clicking on the  icon). To enter the bucket, you just need to click on it.

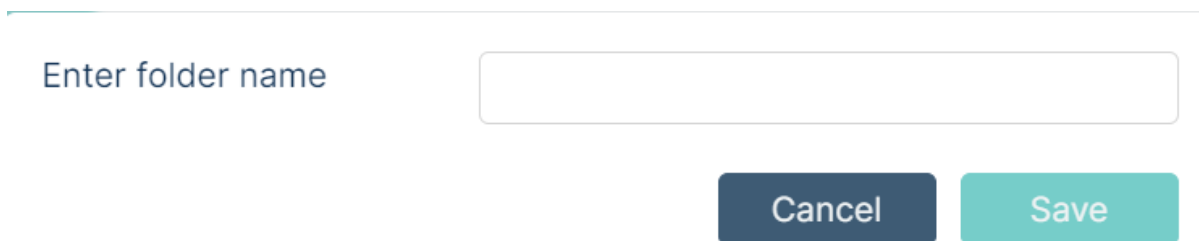
ADDING FOLDERS AND FILES TO BUCKET

After entering our created bucket we can see  and  buttons, used to expand or collapse

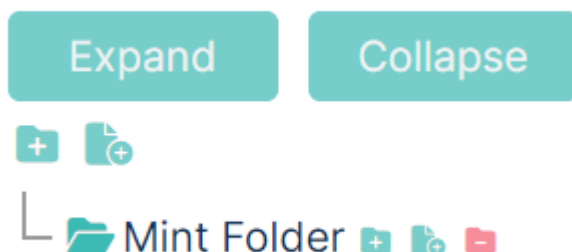
the folder tree. Additionally, we have buttons like “Add Folder”  and “Add File” .



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.

Select files

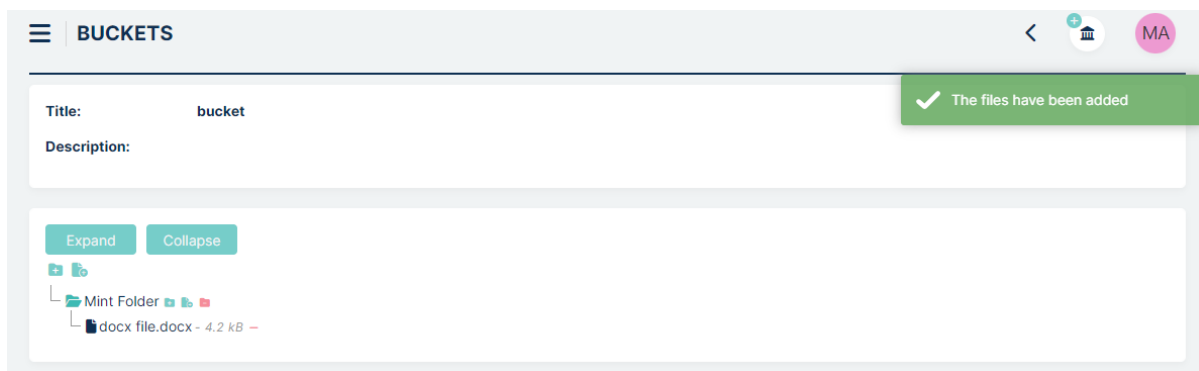
Add Attachment

Cancel

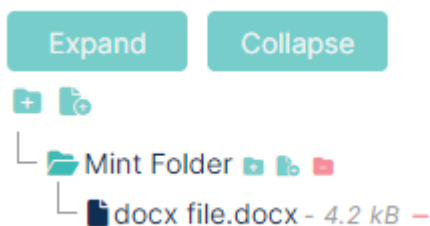
Save

Save

We can save several files at once. After uploading the files and clicking **Save** the modal disappear by itself and the file appear in the folder. There is information that file uploaded successfully



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

Do you want to delete this file?

Yes

No

Accepting this operation will remove file permanently

To remove folder from Bucket, we simply click on



button placed on the right from folder name. The modal with confirmation will appear

Do you want to delete this folder?

The folder will be deleted along with all its contents. Do you want to continue?

Yes

No

Accepting this operation will remove folder and all contained files permanently

To remove Bucket from server, we click on



button in right upper corner of Bucket. The modal with confirmation will appear

Do you want to delete this category?

The category will be deleted along with all its contents. Do you want to continue?

Yes

No

Accepting this operation will remove Bucket, with all contained folders and files permanently

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.

5.19 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. Enabling and disabling visibility of this module for Customer is described in **SETTINGS** chapter of Admin Portal documentation.

Administration module of this feature is placed in bottom of the sidebar and has two sections:

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 cus-

tomers. By creating these templates, administrators ensure consistency and accuracy in the requests they receive, enhancing overall customer support.

5.19.1 CONTAINERS

Clicking on this section will show us view like below

| # | Title | Description | Icon | Action |
|---|-------------|-------------|------|---|
| 1 | Container 3 | Description | | <button>Edit</button> <button>Delete</button> |
| 2 | Container 2 | Description | | <button>Edit</button> <button>Delete</button> |
| 3 | Container 1 | Description | | <button>Edit</button> <button>Delete</button> |

« < 1 > » Total elements: 3 10 ▾

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 parameters

In the center part of the screen we have the list of Containers that we created previously. We can edit them with



Let's describe **Create Container** window

Title*

Description

Initially open ☐

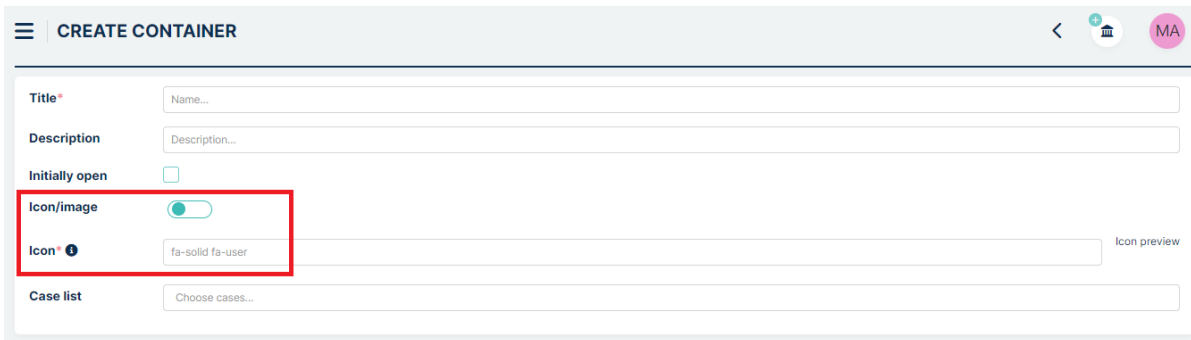
Icon/image ☒

Icon* Icon preview

Case list

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.

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:



CREATE CONTAINER

Title*

Description

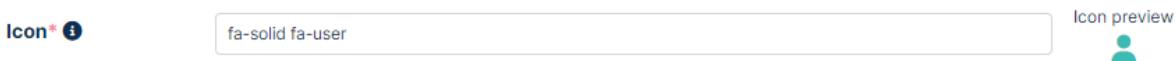
Initially open ☐

Icon/image ☒

Icon* Icon preview

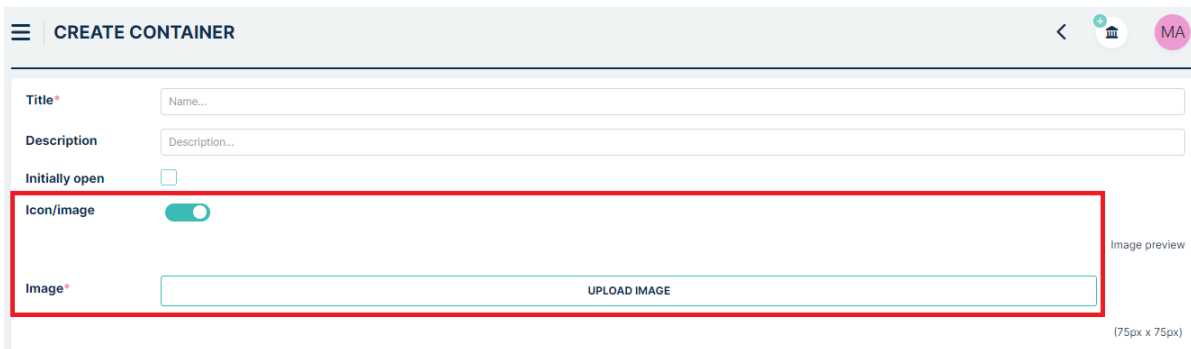
Case list

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.



Icon* Icon preview

If you choose to use a picture for the container, an additional field will appear:



CREATE CONTAINER

Title*

Description

Initially open ☐

Icon/image ☒

Image* Image preview

(75px x 75px)

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.

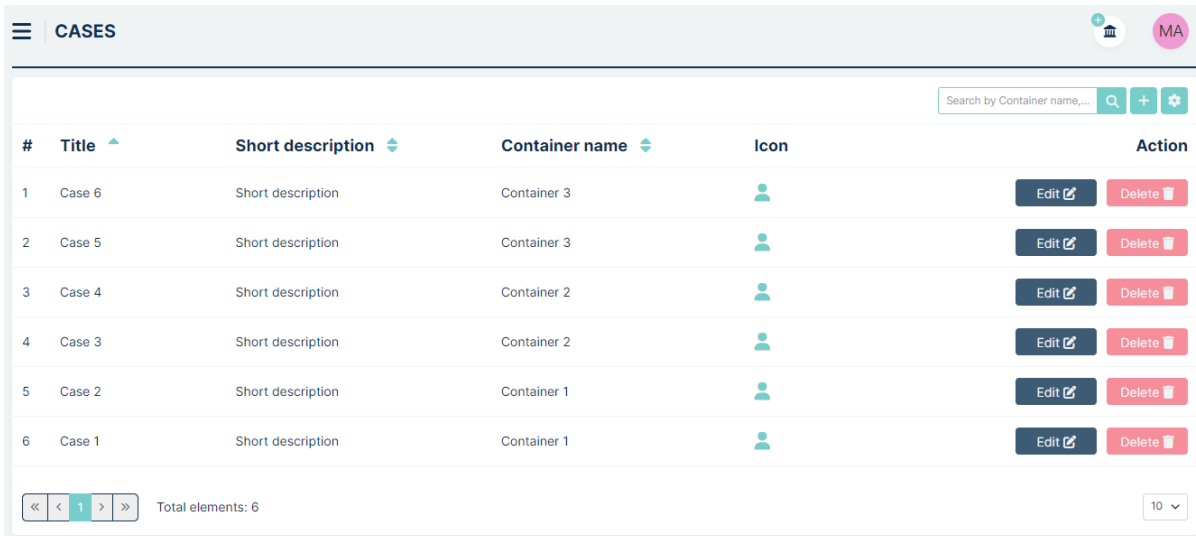
The last field is “Case list.” Here, you can either assign cases now or do so later by editing the container.



Case list

5.19.2 CASES

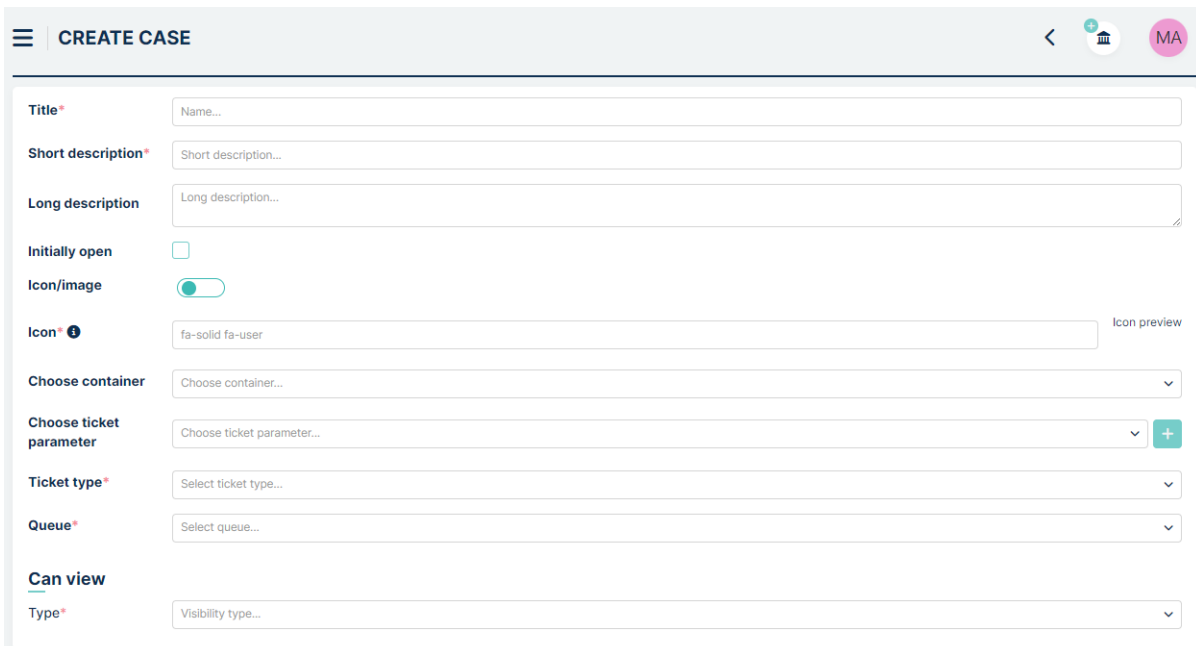
In this section, we create templates for cases. Upon entering this section, you'll encounter a view that resembles the one found in the Containers section, with similar buttons and a "Search field" located in the upper right corner.



| # | Title | Short description | Container name | Icon | Action |
|---|--------|-------------------|----------------|------|---|
| 1 | Case 6 | Short description | Container 3 | | Edit Delete |
| 2 | Case 5 | Short description | Container 3 | | Edit Delete |
| 3 | Case 4 | Short description | Container 2 | | Edit Delete |
| 4 | Case 3 | Short description | Container 2 | | Edit Delete |
| 5 | Case 2 | Short description | Container 1 | | Edit Delete |
| 6 | Case 1 | Short description | Container 1 | | Edit Delete |

We can edit and delete each case by [Edit](#) and [Delete](#) buttons

Let's click on [+](#) button to open Create Case window



CREATE CASE

Title*

Short description*

Long description

Initially open ☐

Icon/image ☒

Icon* Icon preview

Choose container

Choose ticket parameter [+](#)

Ticket type*

Queue*

Can view

Type*

At the top of the window, you'll find a "Title" field and an optional "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:

Icon/image ☒

Icon* Icon preview

If you choose to use a picture for the case, an additional field will appear:

Icon/image ☒

Image* Image preview


(75px x 75px)


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.

Choose container

Another field is “Choose field parameter.” In this section, 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

Choose ticket parameter 

Ticket type*

Next, you’ll find “Ticket type” and “Queue” fields that you can configure.

The last section to complete is labeled “Can view”.

Can view

Type*

In this section, you can configure visibility settings for either all customers or specific Company customer roles. Selecting the second option enables you to assign custom Companies and Roles.

Can view


Type*

Companies*

Role*


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.

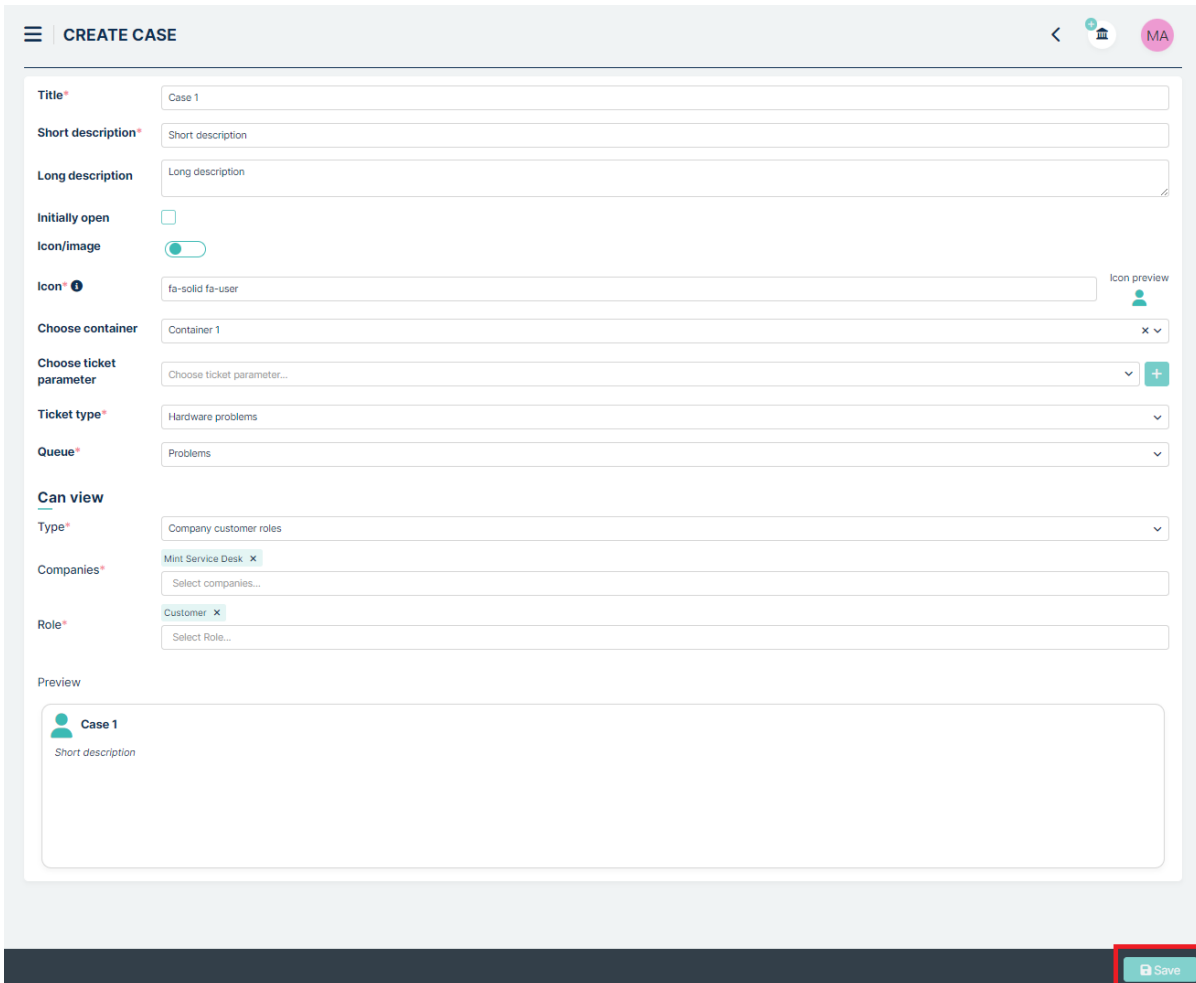
Preview

 Case 1

Short description



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.



CREATE CASE

Title* Case 1

Short description* Short description

Long description Long description

Initially open ☐

Icon/image ☒

Icon* fa-solid fa-user Icon preview

Choose container Container 1

Choose ticket parameter Choose ticket parameter...

Ticket type* Hardware problems

Queue* Problems

Can view

Type* Company customer roles

Companies* Mint Service Desk ×

Role* Customer ×

Preview

Case 1

Short description

Save

The rest part of the Customer Portal functionality has been described in Customer section in this documentation.

5.20 SETTINGS

5.20.1 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' and 'Time Tracking'.

GENERAL SETTINGS

MA

| | | |
|-----------------|-----------|-----------------|
| Files | Templates | Logo |
| Global settings | Tickets | Time tracker |
| Users | Assets | Customer portal |

Max. avatar size (MB)

Max. logo size (MB)

Max. asset attachment size (MB)

Limit for asset attachments

Max. dynamic field attachment size (MB)

Default dynamic field attachment file extensions

Max. email attachment size (MB)

Allowed extensions of files uploaded to MINT

Save

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 attachment specified in numbers.

GENERAL SETTINGS

MA

| | | |
|-----------------|-----------|-----------------|
| Files | Templates | Logo |
| Global settings | Tickets | Time tracker |
| Users | Assets | Customer portal |

Max. avatar size (MB)

Max. logo size (MB)

Max. asset attachment size (MB)

Limit for asset attachments

Max. dynamic field attachment size (MB)

Default dynamic field attachment file extensions

Max. email attachment size (MB)

Allowed extensions of files uploaded to MINT

Save

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’.

The screenshot shows the 'GENERAL SETTINGS' interface. The 'Templates' tab is active. Below the navigation grid, there are three dropdown menus: 'Email confirmation template' (selected: Confirm Email), 'Reset password template' (selected: Reset Password), and 'Two-Factor authentication template' (selected: Two factor authorization). A 'Save' button is located at the bottom right of the settings area.

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.

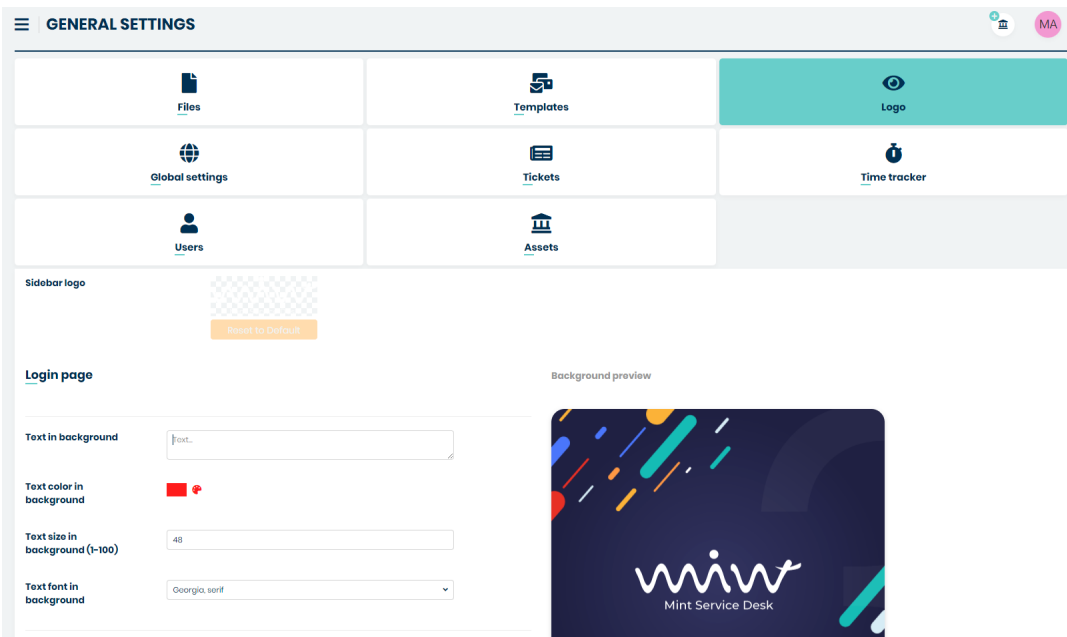
Email confirmation: right here you can select a template which will be used for the email sent to a user, right after he signed up to the Mint Service Desk, to confirm a new account.

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 template that is used in verification code email message in Two-Factor authorization 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”.

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.

Text in background

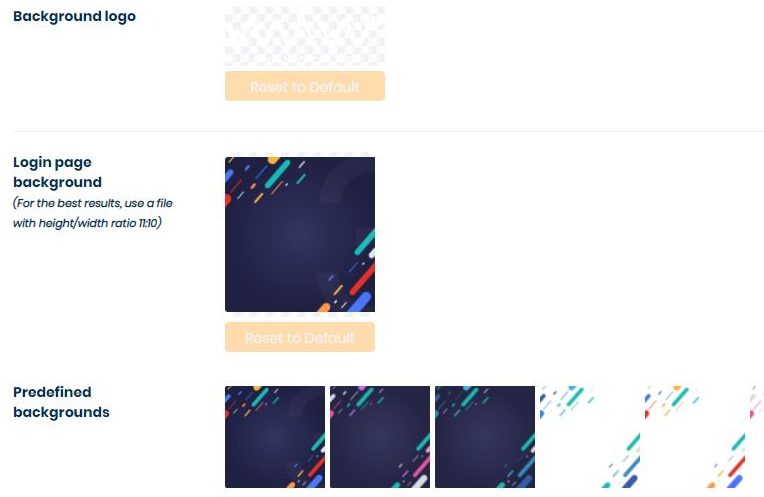
Text color in background



Text size in background (1-100)

Text font in background

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

A rectangular orange button with the text 'Reset to Default' in white.

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.

GENERAL SETTINGS

Files Templates Logo

Global settings Tickets Time tracker

Users Assets Customer portal

Time zone: Time zone... Default language: English (GB)

Show preview: ☐ Browser Tab Title: MINT

Save

Upgrade

- ☒ Access to Automation module
- ☒ Access to Facebook module
- ☒ Access to reports
- ☒ Access to grouped reports
- ☒ Access to Time Tracking module
- ☒ Api Access
- ☒ Access to ticket conditional attributes
- ☒ Access to Customer Portal
- ☒ Access to File Repository
- ☒ Access to search engine
- ☒ Access to identity providers

Synchronize feature flags now

Upgrade to MintSD Enterprise

Time Zone: the default time zone for the system.

Default language: the default language for system users.

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).

Browser Tab Title: allows you to specify what will be displayed in the Tab Title

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
- Access to File Repository
- Access to search engine
- Access to identity providers

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.

GENERAL SETTINGS

Tickets

Max. article attachment size (MB)

Extend ticket type color to ticket number ☒

Auto reassign on reply ☒

Extend filter client by email address ☒

Show default ticket creation properties panel for agent ☒

Show default ticket creation properties panel for customer ☒

Enable search engine ☒

Enable merge tickets ☒

Queues sorting

Priority sorting

Assets relation

Default answer

Selection default ticket creation type for users

[Save](#)

Max. article attachment size (MB): it allows you to set the maximum size of an attachment in megabytes.

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 reassign on reply: This option allows you to determine whether a new agent should be assigned to a ticket after a 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

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:

The screenshot shows the 'User Settings' form. It includes fields for 'Language' (English 128), 'Theme' (Default), and 'Ticket view' (Chat view). A red box highlights the 'Default ticket creation type' dropdown menu, which is currently set to 'Ticket'.

In the **Ticket form configuration** section you can configure what things will be displayed when creating a ticket.

The screenshot shows the 'Ticket form configuration' section for 'Agent' user type. It includes a table with columns: 'Show on ticket creation', 'Required', 'Default value', and 'Show on ticket details'. The settings are as follows:

| | Show on ticket creation | Required | Default value | Show on ticket details |
|------------------------------|-------------------------------------|--------------------------|----------------------------|-------------------------------------|
| Assets | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Tickets relation | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> |
| Customer portal | | | | <input checked="" type="checkbox"/> |
| Queue | <input checked="" type="checkbox"/> | | Select default queue... | <input checked="" type="checkbox"/> |
| Priority | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | <input checked="" type="checkbox"/> |
| Company | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> |
| Company user | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> |
| Ticket type | <input checked="" type="checkbox"/> | | Select default ticket type | <input checked="" type="checkbox"/> |
| Service | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> |
| Contract | <input checked="" type="checkbox"/> | | | <input checked="" type="checkbox"/> |
| E-mail tickets | <input checked="" type="checkbox"/> | | | |
| Default ticket creation type | | | Ticket | |

A 'Save' button is located at the bottom right of the configuration section.

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
- 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:

The screenshot shows the 'CREATE NEW TICKET' interface. At the top, there are two tabs: 'Ticket' and 'E-mail ticket'. The 'E-mail ticket' tab is selected and highlighted with a red rectangular box. Below the tabs, the form is divided into two main sections. The first section, 'Assign company user', contains two dropdown menus: 'Company' (with 'Select company...' text) and 'Company user' (with 'Select company user...' text), each with a green '+' button to its right. The second section, 'New ticket', contains several fields: 'Subject' (text input), 'Assets' (text input with a magnifying glass icon), 'Tickets' (text input with a magnifying glass icon), 'Ticket type' (dropdown menu with 'Select ticket type...' text), 'Description' (rich text editor with a toolbar), 'Assign to queue' (dropdown menu with 'Select queue...' text), and 'Priority' (dropdown menu with 'Select priority...' text).

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.

The screenshot shows the 'E-mail recipients' tab selected. The tab is highlighted with a blue underline. Below the tab, there are two input fields. The first field is labeled 'TO' and the second field is labeled 'CC'. Both fields are empty text input boxes.

- 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.

Ticket search default settings

Page size: 10

Enable filtering ticket with SLA times: ☐

Visible columns: Ticket number X Subject X Last modification X Company X Age X Status X

Searchable columns: Subject X

Save

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

My Tickets configuration

Enable My Tickets: ☒

Save

In the **Signature** section, you can configure signature settings.

Signature

Signatures Policy: All types of signatures

System Signatures: Select signatures

Save

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.

Ticket autoreponse

Channel type: Internal x Email x
Select channel...

Autoreponder policy: Selected by queue

Save

- Channel type - You choose which channel you want the autoreponse to go through.
 - Internal
 - Email
- Autoreponder policy - You select the policy for the autoreponder, that is, whether the autoreponder should be selected by queue or by admin selection.
 - Selected by queue
 - Set on admin settings
 - * Autoreponder MailBox

TIME TRACKER

This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

In this place you can edit some options for the time tracker like:

- choosing 'spent time type',
- 'disable estimation'
- 'disable spend time'

GENERAL SETTINGS

Files Templates Logo

Global settings Tickets Time tracker

Users Assets

Spent time type: CPU

Disable estimation: ☐

Save

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

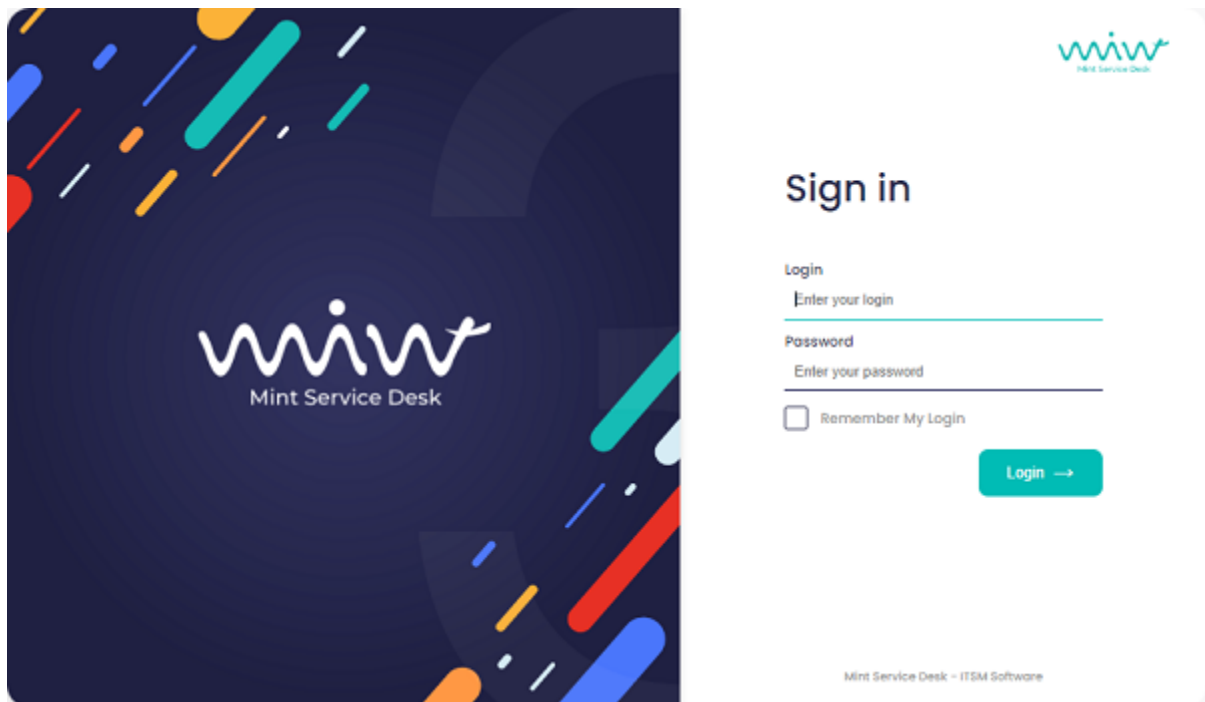
Disable spend time: it allows you to disable or enable the spent time visible in the ticket preview

- **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.

GENERAL SETTINGS

QR Codes

Fields in caption:

Hide QR codes: ☐

Assets menu

User type:

Show assets in sidebar menu: ☒

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.

5.20.2 API

This feature is not available in the free version. To have access to this feature please purchase the Enterprise version.

In this section, you can view, create, edit, or delete all the API Clients for Mint Service Desk.

| # | Client name | Client id | Allowed scopes | Action |
|---|----------------|--------------------|--|---|
| 1 | Mint Agent | Mint Agent ID | mint_aplassets, mint_apltickets | Edit Delete |
| 2 | Mint Agent Bot | Mint Agent Bot ID | mint_aplassets, mint_apltickets, mint_apiuser_restricted | Edit Delete |
| 3 | mobileClient | mint.mobile.client | mint_aplassets, mint_apltickets, mint_apiuser_restricted | Edit Delete |

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

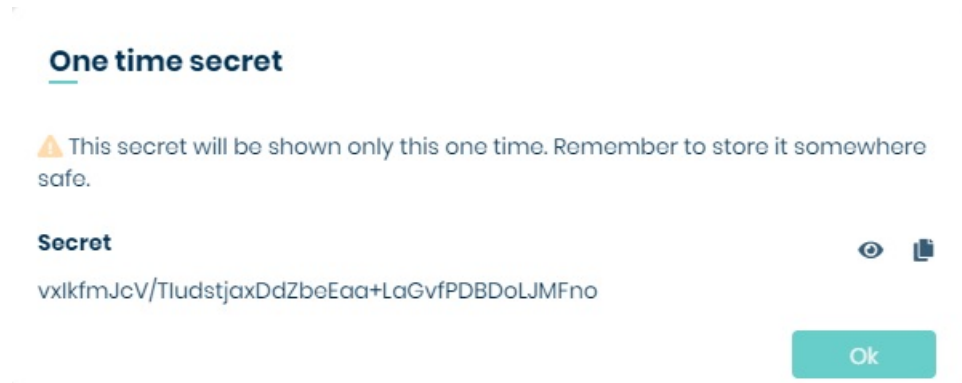
To create a query you first need to prepare a client. To do this, press  button.

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.

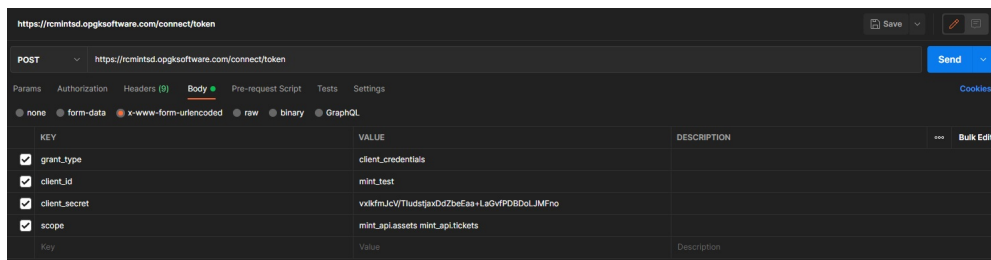


I will use Postman to get the token. To get started, turn on the program and add a new connection. From the available options, select the POST method. And in place of address, type the address to your mint and add '/connect/token' (in my case it will be 'https://rcmintsd.opgksoftware.com/connect/token')

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'

Available authorizations ✕

Bearer (apiKey)

JWT Authorization header using the Bearer scheme.

Name: Authorization

In: header

Value:

Bearer eyJhbGciOiJIUzI1NiI:

Authorize

Close

Then press  button again.

Tickets ▼

GET /internalApi/Tickets/{ticketId}/subscribers

GET /api/Tickets/initTicketValues

GET /api/Tickets/{ticketId}

Parameters

Try it out

| Name | Description |
|--------------------------------|-------------|
| ticketId ^{* required} | ticketid |
| Integer(\$int64) | (path) |

Responses

Response content type: text/plain



| Code | Description |
|------|-------------|
| 200 | Success |

Example Value | Model

```
{
  "ticketId": 0,
  "Name": "string",
  "TicketType": {
    "ticketTypeId": "3fa85f64-5717-4562-b3fc-2c963f66afab",
    "Name": "string",
    "Color": "string",
    "IsDefault": true
  },
  "CreateDate": "2021-10-08T09:30:53.350Z",
  "ModifiedDate": "2021-10-08T09:30:53.350Z",
  "TicketNumber": "string",
  "Owner": {
    "OwnerId": "3fa85f64-5717-4562-b3fc-2c963f66afab",
    "Name": "string"
  },
  "Customer": {
    "UserId": "3fa85f64-5717-4562-b3fc-2c963f66afab",
    "FullName": "string",
    "Email": "string"
  },
  "Company": {

```

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.

Allowed scopes

mint_api.user_restricted (Require user) ✕

Allowed 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 **Create** button. You will see an additional window 'One-time secret'.

One time secret

⚠ This secret will be shown only this one time. Remember to store it somewhere safe.

Secret

****Hidden****



Ok

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.

One time secret

⚠ This secret will be shown only this one time. Remember to store it somewhere safe.

Secret

rycz+feQgF/7EnwmdUEnRcCWQlpYdHHJrcXAmADdIL2+

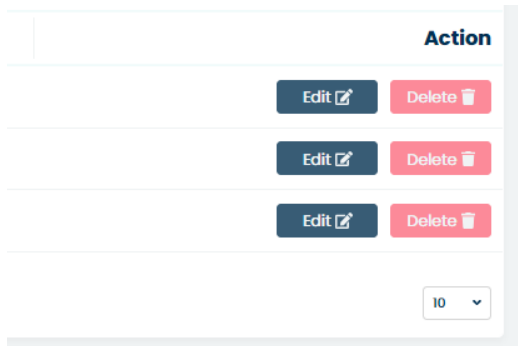


Ok

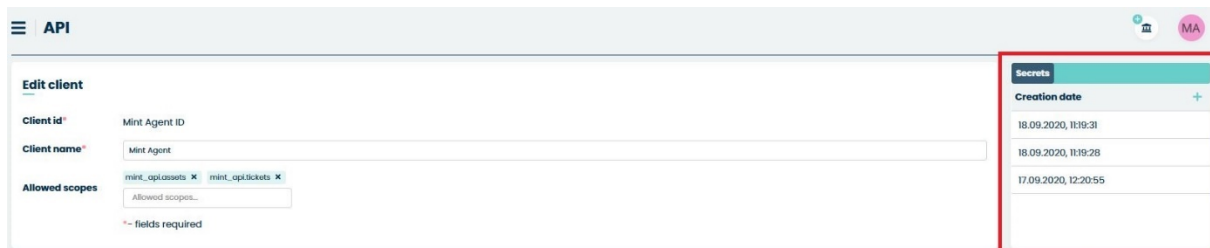
A secret is basically a key registered for the calling web service.

Once you saved this secret just click **Ok** button and API Client (with Bot user) will be created.

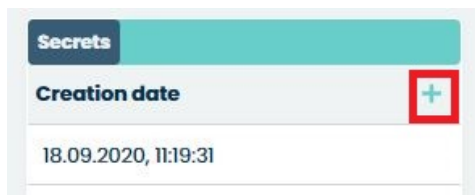
After creating a new API Client, you can always either change anything inside it (**Edit** button) or even delete it from the system (**Delete** button).



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 **x** button will appear. Just click on it and the secret will be deleted.

