

REBEL SOFTWARE · RebelPSA

Help Desk Technician User Guide

How to navigate tickets, queues, and customer communication in RebelPSA's Help Desk module.

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1. About This Guide

This guide explains how to use the Help Desk module of RebelPSA — the ticketing system technicians use every day to receive, work, and close customer support requests. It covers navigating the ticket list, understanding statuses and queues, replying to customers, tracking time, and the permission tiers that determine what you can see and do.

Tip. For information about customer and contact records — company health, contact history, satisfaction trends — see the companion document, the *CRM Technician User Guide*. The two modules are tightly linked: every ticket is connected back to a Contact and a Company record.

2. Getting Around the Help Desk

The Help Desk is organized around three connected concepts:

- **Tickets** — individual customer requests or issues. Every ticket belongs to a Service Board.
- **Service Boards** — the structural container a ticket lives in (for example, a specific customer's support board or a department board like Support, Sales, or Finance).
- **Queues** — focused, filtered views of the ticket pool that surface the right tickets to the right people without changing where a ticket actually "lives." See Section 5.

From the Help Desk, you can view tickets in several layouts:

- **Grid (List) view** — a sortable, filterable table, the default working view for most technicians
- **Kanban board** — tickets grouped visually into columns by status, useful for a quick workload snapshot
- **Split view** — ticket list on one side, a Quick-Preview of the selected ticket on the other, so you can triage without leaving the list

Tip. Toggle between Grid, Kanban, and Split layouts from the view switcher above the ticket list. Your last-used layout and column configuration are remembered.

3. Understanding Ticket Statuses

RebelPSA uses a configurable, ITIL-aligned set of ticket statuses. Every status maps to one of three underlying states — Open, Completed, or Cancelled — which is what determines whether a ticket shows up in "open ticket" views. Your organization may rename or add to the list below, but the seeded defaults are:

Status	State	What It Means
New	Open	Just arrived — created automatically by an email, portal submission, or other integration. Not yet reviewed by a person.
Triaged	Open	Initial review is complete; the ticket has been read and categorized.
Assigned	Open	Ownership has been established — a technician is assigned to work on this ticket.
In Progress	Open	Active work is underway.
Pending Customer	Open	Waiting on a response from the customer.
Pending Vendor	Open	Waiting on a third-party vendor.
Pending Internal	Open	Waiting on an internal action at your organization.
Pending Change	Open	Waiting on an approved change-management window.
Resolved	Completed	Work is complete and verifiable by the customer. This is the status technicians use to mark a ticket done.
Closed	Completed	Finalized and archived. Only visible to Ticket Admins and Ticket Supervisors — see Section 10.
Cancelled	Cancelled	Invalid or duplicate ticket.
SPAM	Cancelled	Identified as spam and suppressed.

Resolved vs. Closed — an important distinction

As a technician, you mark a ticket Resolved when your work on it is done — you do not set it to Closed yourself. "Closed" is a supervisory status that is only visible to users with the Ticket Admin or Ticket Supervisor permission tier; to everyone else, "Resolved" is simply the terminal, completed status.

Once a ticket has been in a Resolved status for a set number of days (7 days by default, configurable by your organization) without being reopened or manually closed, a background process automatically moves it to Closed. If a customer or technician reopens the ticket during that window, the auto-close timer is cancelled.

Tip. Supervisors and Admins use the "Resolved, Not Closed" queue to review recently resolved work before it auto-closes — see Section 5.

4. The Ticket List

Columns & Layout Options

Like the CRM list pages, the ticket list supports a column chooser (show/hide/reorder), adjustable row density, and drag-and-drop column widths. Commonly used columns include:

Column	What It Shows
Ticket #	Right-click for a context menu, including "open in new tab."
Subject	The ticket title.
Status	Current status (see Section 3).
Priority	Ticket priority/severity.
Company / Contact	The customer and person this ticket is for — click through to their CRM record.
Assigned Agent / Team	Who currently owns the ticket.
SLA	A progress bar or badge showing time remaining before an SLA breach, or a breach indicator if already missed.
Follow / Flag	Two independent indicators: Followed (a per-user "watch this ticket" flag) and Flagged (a ticket-wide flag visible to everyone).
Last Comment Time	When the most recent comment was added — not simply when the ticket record was last touched.
Created / Age	When the ticket was created, and how long it has been open.

Column layouts can be saved as part of a Saved View (see below) and set as your default.

Filtering & Saved Views

Use the filter bar for quick filtering, or the Advanced Filter Panel (opened as a modal) for more complex combinations — over twenty ticket properties are available as filter fields, including status, priority, category, source, SLA status, tags, and custom fields.

Saved Views work the same way as in the CRM: a named combination of filters, columns, and sort order, pinned as a tab above the grid, shareable as Private, Team, or Public. If you change something while a saved view is active, a dot indicator shows it's unsaved until you Save or Discard.

- Flagged and Followed have their own quick-filter presets for fast access to your watch-list.
- You can select all rows on the current page, or "select all matching filter" to act on every ticket that matches — even across thousands of records.

Quick Actions Menu

Right-click a ticket, or use the Quick Actions button on the ticket row or detail page, to access a full menu of shortcuts grouped by category:

- Assign, change status, change priority, move to a different board
- Apply a Macro (see Section 8), link to a Problem/Major Incident, create a child ticket
- Soft-delete / restore from Trash
- Merge two tickets together, or link a Device/Asset to the ticket
- Follow / unfollow, flag / unflag

Bulk Actions

Select multiple tickets to reveal the bulk action toolbar. Some actions run instantly (Assign, Change Status, Move), while heavier actions (Change Priority, Add/Remove Tags, Bulk Close, Export) run as a background job so you can keep working while they complete — a status indicator shows progress.

- Bulk assign company, add note, or add contact
- Bulk close, bulk export, bulk tag

Important. Bulk actions apply to every ticket currently selected, including "select all matching filter" selections that may span across more tickets than are visible on screen. Confirm your selection count before applying an action.

5. Queues: Your Personal Command Center

A Queue is a saved, dynamic filter over the ticket pool — not a separate container. A ticket always belongs to a Service Board; a Queue simply gives you a focused lens on top of that, and the same ticket can appear in several queues at once. Removing a ticket from a queue view never removes it from its Service Board.

Your Queue panel sits on the left side of the Help Desk. Every tenant starts with these built-in system queues:

Queue	Shows You
Unassigned	Every open ticket that has not yet been assigned to anyone — the primary triage queue.
My Tickets	Your own open ticket caseload.
My Team	Open tickets assigned to any team you're a member of.

Queue	Shows You
Resolved, Not Closed	Tickets marked Resolved but not yet auto-closed or manually closed — the review window described in Section 3.
SLA At Risk	Every open ticket that is at risk of, or has already breached, its SLA.
Flagged	Your own flagged tickets.

Other Queue Types

- **Status queues** — focused on one or more statuses across boards and teams (e.g. a custom "Awaiting Parts" queue).
- **Team / Service Team queues** — represent a specific team's workload, tied to Service Board membership.
- **Triage queues** — surface unclassified or newly-arrived tickets awaiting assignment, with SLA timers prominently displayed.
- **Personal queues** — private, individual caseload organization. If enabled by your organization, each user may create up to a handful of personal queues, visible only to you unless you explicitly share a read-only link.

Customizing Your Queue Panel

You can personalize how queues appear to you without affecting anyone else:

- Pin your most-used queues to the top of the list
- Hide queues you rarely use (this doesn't revoke your access — you can still search for them)
- Set a Default Queue that opens automatically when you enter the Help Desk
- Drag-and-drop to reorder your queue list
- Toggle live ticket-count badges and SLA/age health indicators on or off
- Filter your panel to show only certain queue types (System, Status, Team, Triage, Personal)

Queue Health Indicators

Each queue can show a health summary: total ticket count, oldest ticket age, SLA at-risk count, SLA breached count, and unassigned count. When a queue exceeds a configured threshold, its indicator turns amber (warning) or red (critical) in the panel to provide a fast visual cue that a queue needs attention.

Silencing Notifications

You can silence a queue's notifications independently of your Service Board notifications — temporarily (for an hour or for the day) or indefinitely. Silencing a queue never silences the underlying Service Board notifications for the same tickets.

6. Working a Ticket: The Ticket Detail Page

Opening a ticket brings you to the Ticket Detail page, your main workspace for handling a customer issue. While the exact layout can be tailored by your organization's administrators (view-level customization), the page generally includes:

- **Header** — ticket number, subject, status, priority, and a Quick Actions toolbar.
- **Comment / Activity thread** — a unified, chronological feed of every public comment, internal note, inbound email, and outbound email on the ticket, each with clear visual badges (Email Sent / Email Received) so you always know what the customer has seen.
- **Reply composer** — where you write a public reply, an internal note, or an email response — see Section 7.
- **Time entries** — log hours worked against the ticket — see Section 9.
- **Attachments** — files uploaded manually or automatically extracted from inbound emails.
- **Linked records** — the associated Contact and Company, any linked device/asset, related Problem/Major Incident, and any child tickets.
- **SLA panel** — time remaining before breach, or breach status if already missed.

Two view modes are available depending on your role: a Limited view for staff who only need contact info, subject, body, flags, and attachments (no troubleshooting elements), and the full Service view for Help Desk technicians. If your view seems to be missing something you expect, check with an administrator as your view visibility is role-based.

Tip. Use the Quick-Preview side panel from the ticket list (single-click a row) when you just need a fast look at a ticket's status and last activity without fully opening it.

7. Replying to Customers by Email

Most customer communication in RebelPSA happens by email, and everything is automatically tied back to the ticket in both directions:

- **Inbound** — when a customer replies to a ticket email (or emails your support address for the first time), RebelPSA automatically matches it to the existing ticket (or creates a new one) and adds it to the ticket's comment/activity thread with an "Email Received" badge.
- **Outbound** — when you reply from the ticket, RebelPSA sends the email through your organization's connected mailbox and records an "Email Sent" entry in the same thread.

Sending a reply

- Open the ticket and use the reply composer.
- Write your response. You can attach files and use CC/BCC as needed.

- Decide whether this reply should go to the customer, stay as an internal note, or both — the composer has separate toggles for notifying the customer and notifying the assigned agent.
- Click Submit.

A quick reference for what happens based on your notification toggles:

Notify Customer	Notify Agent	Result
Off	Off	Comment is saved to the ticket only — nobody is emailed.
On	Off	Customer receives an email; comment saved to the ticket.
Off	On	Assigned agent receives a notification; comment saved to the ticket.
On	On	Both the customer and the assigned agent are emailed; comment saved to the ticket.

Important. *The Submit button is disabled if you have Notify Customer checked but there is no email address on file for the contact — you'll see a warning rather than a silent failure.*

Threading & attachments

- Reply threading is handled automatically — you don't need to manage subject lines or message references yourself.
- Attachments on inbound customer emails are automatically pulled into the ticket.
- The original raw email is retained as part of the ticket record for a period of time, which can be useful if you ever need to review exactly what a customer sent.

8. Snippets & Macros

Snippets are reusable pieces of text you can insert into a comment or email reply instead of typing the same response repeatedly — things like a standard troubleshooting checklist, a closing message, or password-reset instructions. Snippets can include dynamic variables (such as the ticket status or customer name) that are filled in automatically when inserted.

- **Personal snippets** — created and managed by you, under My Snippets.
- **Shared/organization snippets** — created by administrators for consistent, approved messaging across the team.

Macros bundle one or more actions together — for example, setting a status, adding a canned reply, and applying a tag — so a common multi-step task becomes a single click from the Quick Actions menu.

9. Time Tracking

Log the time you spend on a ticket directly from the Ticket Detail page:

- Enter hours and minutes worked
- Select a Work Type from the dropdown (the available types are configured by your organization)
- Drafts auto-save as you work, so you won't lose a time entry if you navigate away before submitting

Accurate time tracking feeds your organization's billing, reporting, and technician workload metrics, so it's worth logging time as you go rather than trying to reconstruct it later.

10. Permission Tiers: What You Can and Can't Do

Help Desk access is governed by a four-tier Ticket Role hierarchy, assigned per Service Board. There is no implicit access — if you are not a member of a board, you cannot see its tickets, even if you are a tenant administrator elsewhere in the system.

Tier	What You Can Do
Viewer	Read-only access to tickets on the board. Cannot be assigned tickets and does not appear in the agent-assignment picker.
Agent	The standard technician tier — view, work, comment on, and update tickets assigned to you or your team.
Supervisor	Everything an Agent can do, plus oversight capabilities such as reviewing the Resolved, Not Closed queue and reassigning tickets across the team.
Admin	Full control over the board, including membership, settings, and the ability to see and set the Closed status.

New members are added at the Viewer tier by default until explicitly upgraded. If you believe your permission tier is incorrect for your role, contact your Help Desk administrator.

11. Service Level Agreements (SLA)

Each ticket's SLA is tracked in real time and surfaced as a progress bar or badge on the ticket list, the Quick-Preview panel, and the Ticket Detail page:

- **On Track** — plenty of time remaining
- **At Risk** — approaching the breach threshold
- **Breached** — the SLA window has been missed

Certain statuses (for example, Pending Customer or Pending Vendor) pause the SLA clock, since the delay isn't within your control while waiting on an outside party. The SLA At Risk queue (see Section 5) is the fastest way to see everything that needs attention across your boards before anything breaches.

12. Customer Satisfaction & Ticket Surveys

After you resolve or close a ticket, RebelPSA can automatically send the customer a short satisfaction survey (CSAT, 1–5 stars) and, depending on configuration, a more detailed Ticket Survey. Results are attached to the ticket and roll up into your own technician average, visible on the Help Desk dashboard's technician leaderboard.

Important. A CSAT score of 2 stars or lower automatically alerts you and your supervisor. Treat this as a cue to follow up with the customer directly rather than simply noting the score.

13. Common Technician Workflows

Starting your day

- Open your default queue (usually My Tickets or Unassigned, depending on your role).
- Scan the SLA At Risk queue for anything approaching a breach.
- Check Flagged and Followed for anything you or a teammate marked as important.

Picking up a new ticket from Unassigned

- Open the Unassigned queue.
- Review the ticket, confirm the customer and contact are correct, and triage the category/priority if needed.
- Assign the ticket to yourself (or use a Quick Action if your workflow uses one).
- Move the status forward — typically from New to Triaged or Assigned as you begin work.

Replying to a customer and closing out work

- Open the ticket and review the full comment/activity thread so you're not repeating a question already answered.
- Use a Snippet if a standard response applies, and personalize it as needed.
- Log your time.
- Set the status to Resolved once your work is verifiably complete — remember, you set Resolved, not Closed.

Handling a low CSAT alert

- Open the ticket referenced in the alert and review the survey comment, if one was left.
- Reach out to the customer to understand what went wrong.
- Log a note summarizing the follow-up conversation and any resolution.

14. Quick Reference & Glossary

Term	Meaning
Service Board	The structural container a ticket belongs to — every ticket has exactly one.
Queue	A saved, dynamic filter/lens over the ticket pool. A ticket can appear in several queues at once without changing its Service Board.
State	The underlying classification (Open, Completed, Cancelled) that every ticket status maps to — this is what "open ticket" views filter on.
SLA	Service Level Agreement — the time-bound commitment tracked on each ticket.
Snippet	A reusable block of text, with optional dynamic variables, for fast replies.
Macro	A bundle of actions (status change, tag, canned reply, etc.) triggered in one click.
Ticket Role	Your permission tier on a given Service Board: Viewer, Agent, Supervisor, or Admin.
Auto-Close	The background process that moves a ticket from Resolved to Closed after a configurable number of days with no further activity.
CSAT	Customer Satisfaction Score — a 1–5 star survey sent after ticket closure.
Follow / Flag	Follow is a personal "watch this ticket" marker; Flag is a ticket-wide marker visible to everyone.