OVERVIEW OF TICKETING SYSTEM

When your members submit information for organizational approval, they expect you to process their requests quickly so they can move ahead with architectural changes and other community related requests. With a full ticketing system built directly into your website, we make it easy for you to handle data submission and review, confer with other administrators, and approve or reject each request after communicating directly with members.

Click on the "Forms" tab to open it and the "Ticketing System" tab to view a list of all tickets. Separate tabs display information about pending, approved, and rejected ticket submissions. The pending column are the tickets that need an Admins' attention.

◆ *A ticket can be pending review for three reasons: It's a new submission, it's a response to a request for more information, or it's a response to a modification request.*

In this community, we use an Landscaping Request form. Let's walk through the process as an example of how the ticketing system works.

When a member logs in from the home page of our organization's website, they can access the Landscaping Request. Your custom form ticket may look different than this example. After the member fills out the form, clicking the "Submit" button will send the request for administrative review.

OVERVIEW OF TICKETING SYSTEM - CONTINUED

In the Forms tab of the administrative dashboard menu, the "Ticketing System" tab loads a list of all the tickets that residents can submit.

When you click on the "View Results" icon for a specific ticket, you can see a list of all the submissions for this specific ticket. Each entry in the list identifies the member who submitted the request, the unique ID number of the ticket, the status and date of the submission, the date of any recent amendment, the name of the last person to comment on the request, and action icons to view, approve, or reject the submission.

In virtually all cases, however, submissions require review. When you click on the "View Submission" icon for the ticket submission that the resident just posted, you see the "Request Details" at the left, with an area for file attachments below it. This file attachment area displays items that you as the administrator or the member attach in the "Ticket Comments" area at the right.

◆ *Note that if the member attaches files to the request itself, those show up within the "Request Details" section of the ticket submission.*

In that comments area, you can add a note that simply remarks on the submission but doesn't ask the member to change anything about it. You also can click on the "Request Modification" button to send the submission back to the member with notes for revisions. To add an attachment to your reply, click on the "include attachments" link.

If your organization includes multiple administrators, you may share overall responsibility for ticket approvals or even collaborate on responses to some submissions. To make a comment that only your fellow administrators can see, activate the "Admin Only Comment" checkbox. These comments appear with a gray background.

hoastart

OVERVIEW OF TICKETING SYSTEM - CONTINUED

◆ *Note that if you send a modification request, your comment is always visible to the member even if you activate the "Admin Only Comment" checkbox.*

To approve or reject the member's request, click on the appropriate button at the bottom of the "Request Details" area.
If you send the request back to the member for modification, the submission remains pending and still shows up on the list of pending entries.
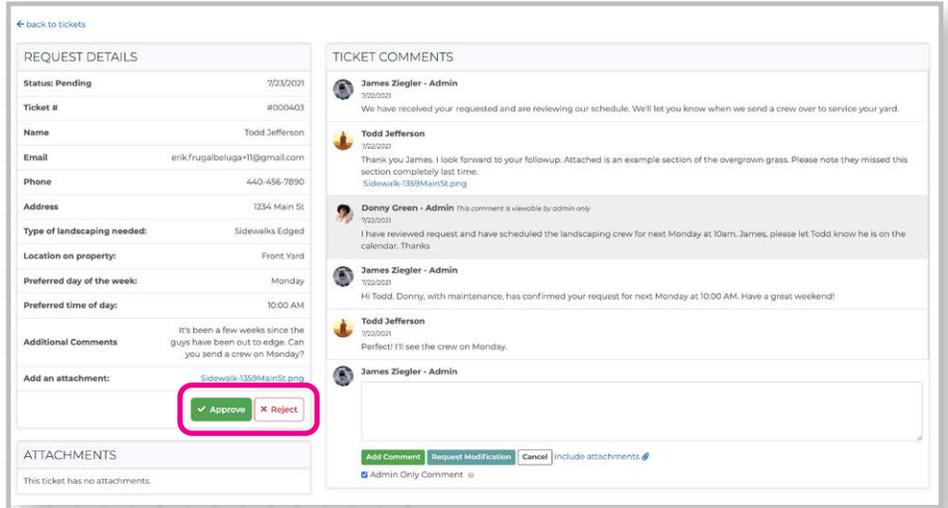
The "Approved" tab shows all submissions that reached a satisfactory agreement. Likewise, the "Rejected" tab displays requests that failed to gain approval. On both of these tabs, you can see the name of the administrator who processed the submission and click on the "View Submission" icon to look at its details. Both admins and member can still comment on a resolved ticket, but ticket information can no longer be modified in any way.
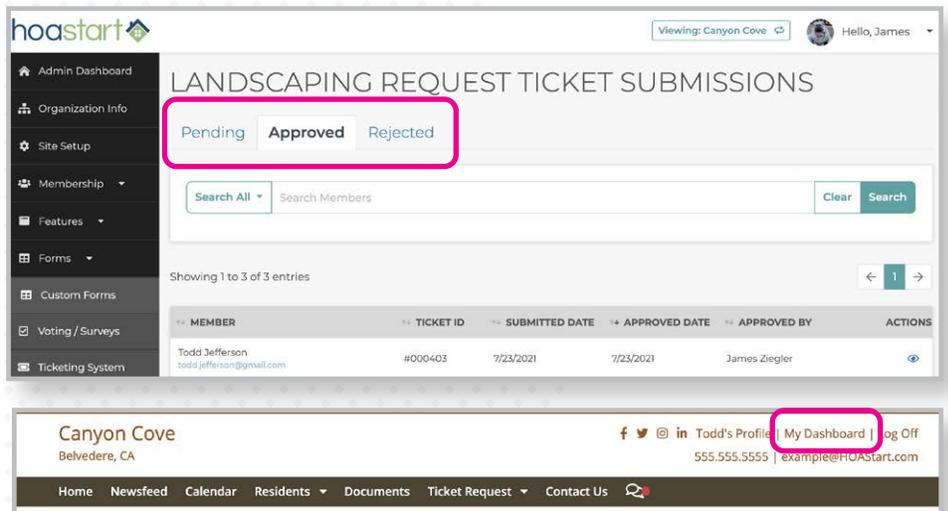
Some tickets may move back and forth between member and administrators multiple times before the member's revisions satisfy the HOA or clearly show that the member's request will not be acceptable. Each time either party comments on the request, those comments show up in the "Ticket Comments" area, listed in chronological order. Notification emails will alert admins and members when comments or status changes have been made to a ticket.

A member must be logged into the organization's website to track the status of submitted tickets by clicking on the "My Dashboard" link in the upper right corner of any page on the website. Here they access the "Tickets" card and at-a-glance can view of all their current and previous submissions. They can easily see the ticket status and those that require additional attention.
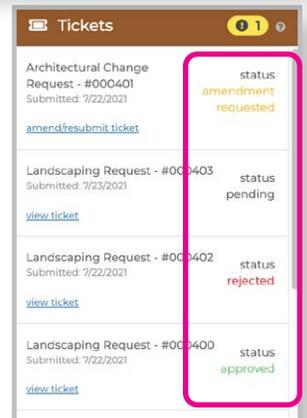
OVERVIEW OF TICKETING SYSTEM - CONTINUED

If a ticket modification is requested, members will see at the bottom of the Request Details box, an "Amend" button. Clicking this will open the original submitted information form, where requested changes can be made and saved.

◆ *Note that when a member reviews a ticket submission, the "Add Comment" button posts ordinary replies but the "Resubmit" button posts responses to requests for modification. Clicking resubmit will lock the ticket information again and return the ticket status back to pending.*

On the administrative side, you can view tickets through the Administrative Dashboard, where a "Tickets" tab lists the most-recent submissions and the "View More" button loads the "Tickets" window.

Within an individual ticket, all three submission tabs—pending, approved, and rejected—provide a search area that you can use to narrow down the list and find specific ticket submissions by the ID of the ticket, the first or last name of the member who submitted it, their e-mail address or phone number, their address, city, state, or ZIP Code. To clear a search, simply click on the "Clear" button.

You also can use the "Edit" icon to revise the ticket form itself if you need to collect different information. The "Deactivate" icon will hide a ticket that is no longer used. Note that any and all ticket submissions associated with a deactivated ticket also disappear—but that if you reactivate a ticket, all its submissions reappear with it.

If you have any further questions about the Ticketing System features, please visit support.hoastart.com where you can open a support ticket.

hoastart™