REFLEXION v2.0 CHEATSHEET

What it is?

Reflexion is an online support system provided by Whitsun Systems that helps to fully track and manage clients and their support requests. Version 2.0 of Reflexion enables you to create tickets, access the self-service, send bulk SMS and emails to clients, publish and unpublish knowledge base stories and rate tickets based on satisfactory performance of the service rendered.

Users/Profiles

Reflexion has 5 five user profiles which are

1. Administrator: this is the super user which creates all other roles except personnel and tackles all issues of management.
2. Engineer: this user tackles the issues logged and resolves them to make the client enjoy the usage of the product or service being used.
3. Call Centre Operator: this user receives calls from customers and logs issues on their behalf. (S)he sees updates on each ticket and can inform clients when the need arises.
4. Primary Contact: this user creates other users within company who can access Reflexion and create tickets and manage them. Can also request for change in service being rendered.
5. Personnel: this user creates and makes edits to tickets and closes when satisfied with the solution provided.

Getting Started

Login Details

- Visit support.whitsunsystems.com
- Enter your username (email address) and password. A password will be generated for you on setup. Remember to change the password on initial login.

Forgotten Password

- Click on forgotten password link and head to your email for instructions.

Setup

The following duties can only be performed by the admin

Create Ticket Category

- Click on ticket categories
- Click on the add new icon,
- Enter the category name and save

Edits can be made by clicking on the respective icons in the grid.

Assign a ticket to an engineer

- Click on All tickets and then on the unassigned tab
- Click on the icon under the action column
- Select an engineer from the dropdown and assign

Ticket Management

The various ticket statuses are new, active/in progress, completed, reopened and closed. A ticket has only one of these states at any given time.

Create Ticket

1. Tickets can be created by personnel and primary contacts for self, or by call centre operators and engineers for clients.
   a. Click on new ticket on homepage or self-service page of support website
   b. Enter login credentials and create by inputting details of the ticket.
2. Login directly from the support site into your portal
   a. Click on new ticket:
   b. If personnel, engineer or call centre operator, click on the green icon you see as you login
   c. If primary contact, click on My Active tickets and then green icon
3. Fill in the details and submit. You can attach files ***(.png, .jpg, .jpeg, .gif, .doc, .docx, .pdf, .txt***) with **max size of 2mb**
4. You can edit a ticket by clicking on the edit button by that ticket to update it.

Resolve a ticket

You must be an engineer to resolve a ticket.

- Click on the new tab within tickets
- Click on the details icon,
- Having gone through, if you can resolve it, click on resolve.
- Enter text to resolve and proceed.

If you can't resolve, escalate by clicking on the escalate button.

Close Ticket

Only a client (personnel or primary contact) can close a ticket. A ticket however will automatically close if status is complete (or 100%) for 72 hours.

To close and rate a ticket:

- Click on the close icon, under the actions column.
- Confirm closure and select a rating
- Send and this closes the ticket.

Reopen Ticket

In the case that a closed ticket needs to be reopened,

- Click on the reopen icon by the particular ticket
- Enter your issues to be sent to the engineer and save.

Self-Service (Knowledge Base)

The engineer can add solutions to closed tickets to be published. The admin is the final publisher of all kb stories and can also create a story from scratch.

To add a solution (as an engineer):

- Click on the closed tab within All Tickets
- Click on add solution button. Note that button appears only by closed tickets that have solutions to be published.
- Enter the solution for that particular ticket. You can add multimedia to it.
- Click on add solution

To publish a story(only admin can do this):

- Click on All Tickets then on the closed tickets tab
- Click on the folder icon by a ticket. This icon only appears by closed tickets which have solutions.
- Click on Add to self-service and add tags separated by commas
- Click on Add

To add a new article in self-service:

- Click on self-service, while logged in as admin
- Click on the new article icon,
- Enter the details in the fields.
- Add

Bulk Messaging

To send SMS,

- Select the SMS under Bulk Messaging and choose a category from the dropdown
- Enter the text message. Note that the message must not exceed 160 characters.
- Send SMS

Repeat the above steps while replacing SMS with email to send bulk emails

Logs and Reports

Activity and system logs can be viewed by clicking on name within portals.

Reports can be viewed by admin after selection of items from filters within the portal.

Other resources

User manual: can be found in help within the application

Release notes: this and the user manual can be found within the News section on whitsunsystems.com