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( T U B )

# OTOBO User Manual

10.1

Rother OSS GmbH

2024 09 20



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# CHAPTER 1



---

This manual is intended for use by OTOBO agents. The chapters describe the usage of the OTOBO software as an agent user.

## 1.1 Introduction

Introduction

---

**Note:** You have to replace <OTOBO\_HOST> with your domain.

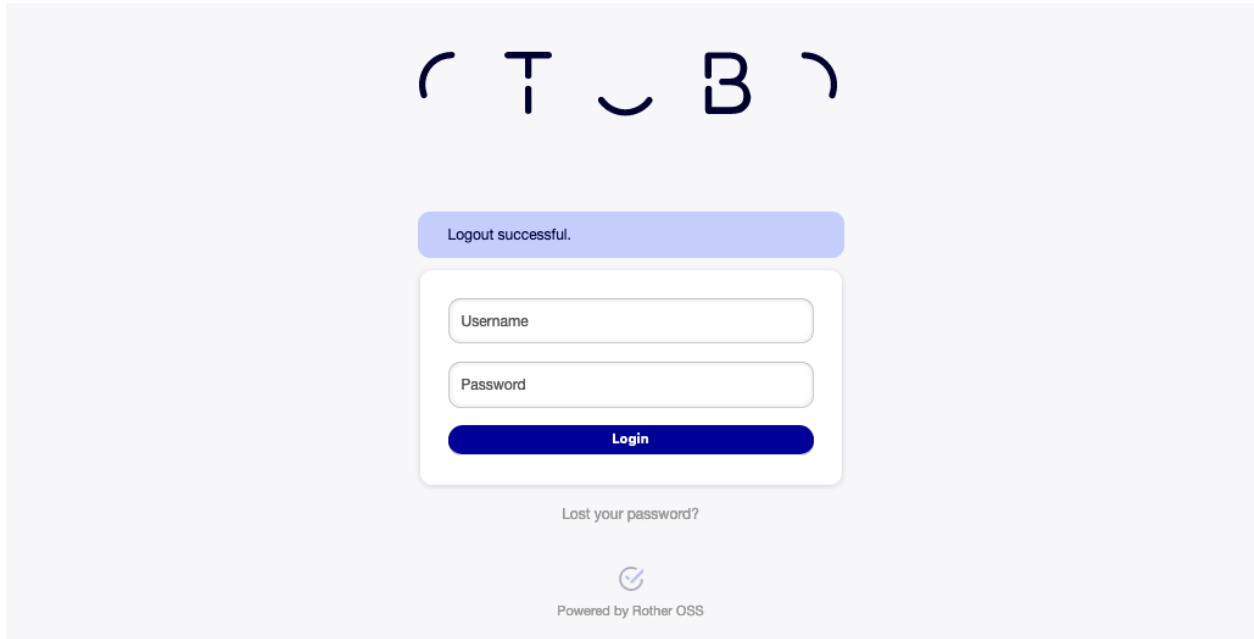
---

```
https://<OTOBO_HOST>/otobo/index.pl
```

You need an agent account to be able to use OTOBO. If you have no account yet, please contact your administrator.

Introduction

Introduction



1.1: 10.1.1



1.2: 10.1.2

T B F

Dashboard
Customers
Calendar
Tickets
FAQ
Reports
Admin
OtoBo Helpdesk

**Reminder Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

**Escalated Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

**New Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (1)

TICKET#	AGE	TITLE
2015071510123456	57 d 22 h	Welcome to OTOBO!

**Open Tickets**

My locked tickets (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

**Ticket Queue Overview**

QUEUE	NEW	OPEN	PENDING REMINDER	TOTAL
Raw	1	0	0	1
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b>	

**Settings**

**7 Day Stats**

**Upcoming Events**

none

**Latest updated FAQ articles**

**Latest created FAQ articles**

**OTOBO News**

- [OTOBO Launch](#)
- [Chatbot, Testing, neue Features](#)
- [Rother OSS veröffentlicht OTOBO 10 beta Beta-Launch am 30.01.2020](#)
- [Rother OSS kündigt neues Open Sourc...](#)

Powered by Rother OSS

1.3: [redacted]





The screenshot displays the OTOBO dashboard with a dark blue header containing navigation links: Dashboard, Customers, Calendar, Tickets, FAQ, Reports, Admin, and a search icon. The main content area is divided into several sections:

- Reminder Tickets:** Shows 'My locked tickets (0)' and a table with columns TICKET#, AGE, and TITLE. The table is currently empty.
- Escalated Tickets:** Shows 'My locked tickets (0)' and a table with columns TICKET#, AGE, and TITLE. The table is currently empty.
- New Tickets:** Shows 'My locked tickets (0)' and 'All tickets (1)'. The table has columns TICKET#, AGE, and TITLE. One ticket is listed: 2015071510123456, 57 d 22 h, Welcome to OTOBO!
- Open Tickets:** Shows 'My locked tickets (0)' and 'All tickets (0)'. The table has columns TICKET#, AGE, and TITLE. The table is currently empty.
- Ticket Queue Overview:** A summary table with columns QUEUE, NEW, OPEN, PENDING REMINDER, and TOTAL.
 

QUEUE	NEW	OPEN	PENDING REMINDER	TOTAL
Raw	1	0	0	1
<b>TOTAL</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>

The right sidebar contains:

- Settings** (dropdown menu)
- 7 Day Stats:** A line chart showing 'Created' (red) and 'Closed' (green) tickets over a 7-day period. The y-axis ranges from 0 to 1. A single green bar is visible on Thursday.
- Upcoming Events:** Currently empty.
- Latest updated FAQ articles**
- Latest created FAQ articles**
- OTOBO News:** A list of news items including 'OTOBO Launch', 'Chatbot, Testing, neue Features', 'Rother OSS veröffentlicht OTOBO 10 beta', 'Beta-Launch am 30.01.2020', and 'Rother OSS kündigt neues Open Sourc...'.

At the bottom center, there is a logo for Rother OSS and the text 'Powered by Rother OSS'.

2.1: Dashboard

This block shows the top portion of the OTOBO dashboard, including the dark blue header with navigation links: Dashboard, Customers, Calendar, Tickets, FAQ, Reports, Admin, and a search icon. The OTOBO logo and 'Otobo Helpdesk' text are also visible.

2.2: Navigation

ChatEngine::Active

- 
- 
- ( )

The chat availability status will be changed from external chats to internal chats each time an agent logs in to OTOBO again.

**Reminder Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

	TICKET#	AGE	TITLE
	none		

**Escalated Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

	TICKET#	AGE	TITLE
	none		

**New Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (4)

	TICKET#	AGE	TITLE
☆	2020112449000038	8 d 23 h	Test via Email
☆	2020112449000029	9 d 1 h	Test via Email
	2020112449000011	9 d 2 h	Willkommen
	2015071510123456	72 d 21 h	Welcome to OTOBO!

**Open Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (3)

	TICKET#	AGE	TITLE
☆	2020112549000027	7 d 18 h	Test Internal Helpdesk (Dynamic Field) Network Operations
☆	2020112549000018	7 d 21 h	Test Internal Helpdesk (Dynamic Field)
	2020111949000011	14 d 0 h	User cannot login to his mail account

**Ticket Queue Overview**

QUEUE	NEW	OPEN	PENDING REMINDER	TOTAL
Misc	0	3	0	3
Raw	4	0	0	4
<b>TOTAL</b>	<b>4</b>	<b>3</b>	<b>0</b>	

**Settings**

**7 Day Stats**

**Upcoming Events**

none

**Latest updated FAQ articles**

[How to create a support bundle](#)  
Misc - 11/18/2020 15:51 (Europe/Berlin)  
[Computer is dead](#)  
Misc - 11/18/2020 15:30 (Europe/Berlin)

**Latest created FAQ articles**

[How to create a support bundle](#)  
Misc - 11/18/2020 15:51 (Europe/Berlin)  
[Computer is dead](#)  
Misc - 11/18/2020 15:30 (Europe/Berlin)

**OTOBO News**

[OTOBO Launch](#)  
[Chatbot, Testing, neue Features](#)  
[Rother OSS veröffentlicht OTOBO 10 beta](#)  
[Beta-Launch am 30.01.2020](#)  
[Rother OSS kündigt neues Open Sourc...](#)

2.3:





**New Tickets**

Shown Tickets:

Shown Columns:

AVAILABLE COLUMNS	VISIBLE COLUMNS (ORDER BY DRAG & DROP)
Filter available fields...	1. TicketNumber
Changed	2. Age
Created	3. Title
Customer Name	
Customer ID	
Customer User Name	
Customer User ID	
First Response Time	

or

2.4: 2.4.1

**Reminder Tickets**

My locked tickets (0) Tickets in My Queues (0) **All tickets (0)**

	TICKET#	AGE	TITLE
none			

2.5: 2.5.1

**Escalated Tickets**

My locked tickets (0) Tickets in My Queues (0) **All tickets (0)**

	TICKET#	AGE	TITLE
none			

2.6: 2.6.1

**New Tickets**

My locked tickets (1) Tickets in My Queues (0) **All tickets (1)**

	TICKET#	▼ AGE	TITLE
■	2015071510123456	122 d 22 h	Welcome to OTRS!

2.7: 2.7.1

Figure 2.8: Open Tickets widget

Open Tickets			
My locked tickets (0)	Tickets in My Queues (0)	<b>All tickets (0)</b>	
	TICKET#	▼ AGE	TITLE
none			

Figure 2.8: Open Tickets widget

Figure 2.9: Running Process Tickets widget

Running Process Tickets						
My locked tickets (0)	My responsibilities (0)	Tickets in My Queues (0)	Tickets in My Services (0)	<b>All tickets (0)</b>		
	TICKET#	PROCESS	▼ ACTIVITY	▼ AGE	TITLE	
none						

Figure 2.9: Running Process Tickets widget

The Ticket Queue Overview widget gives an overview as a ticket count matrix, where the rows represent queues and the columns represent the ticket states. Each cell displays the number of tickets in a defined state that belongs to a particular queue.

Ticket Queue Overview				
QUEUE	NEW	OPEN	PENDING REMINDER	TOTAL
Misc	0	3	0	3
Raw	4	0	0	4
<b>TOTAL</b>	<b>4</b>	<b>3</b>	<b>0</b>	

Figure 2.10: Ticket Queue Overview widget

Figure 2.11: Ticket Queue Overview widget configuration

Figure 2.11: Ticket Queue Overview widget configuration

1. Ticket Queue Overview

Queue	State	Count	Color
Queue	State / State	TicketCalendarStartTime	Color
Queue	State / State	TicketCalendarEndTime	Color

2. Ticket Queue Overview → Ticket Queue Overview → Ticket Queue Overview

Figure 2.11: Ticket Queue Overview widget configuration

- Ticket::Frontend::AgentTicketPhone###DynamicField
  - TicketCreateStartTime → 1 - Queue

- TicketCreateEndTime → 1 -
- Ticket::Frontend::AgentTicketEmail###DynamicField
  - TicketCreateStartTime → 1 -
  - TicketCreateEndTime → 1 -
- Ticket::Frontend::AgentTicketFreeText###DynamicField
  - TicketCreateStartTime → 1 -
  - TicketCreateEndTime → 1 -

3. DashboardEventsTicketCalendar###Queues Raw

Raw

Events Ticket Calendar

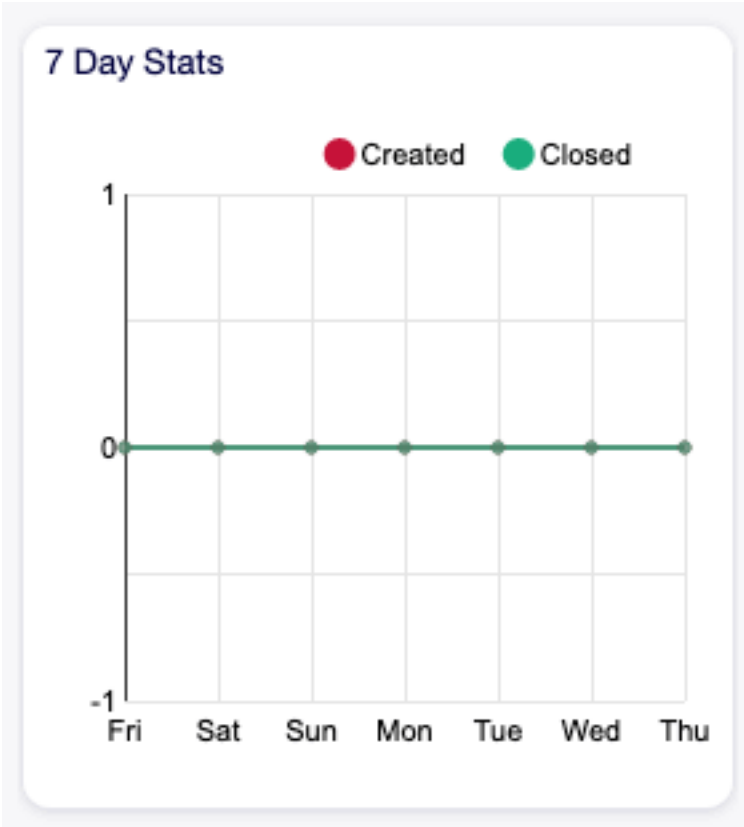
month week day Mar 2019 < > Today

Mo	Tu	We	Th	Fr	Sa	Su
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
7a TODOs for the next week						
1	2	3	4	5	6	7

2.11: Raw

2.1.2





2.13: 7 Day Stats

**Upcoming Events**

none

2.14: Upcoming Events

Figure 2.15: Out of Office widget



Figure 2.15: Out of Office widget

Figure 2.16: Latest updated FAQ articles widget



Figure 2.16: Latest updated FAQ articles widget

Figure 2.17: Latest created FAQ articles widget



Figure 2.17: Latest created FAQ articles widget

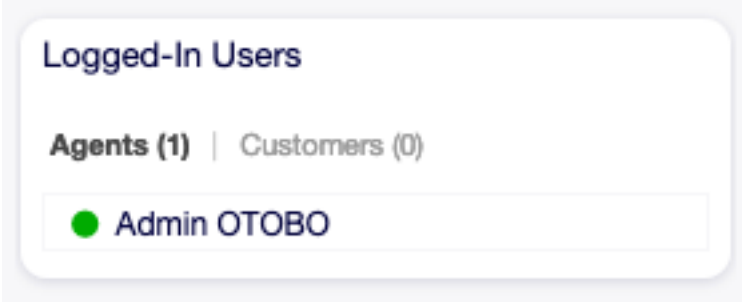
Figure 2.18: OTOBO News widget

The OTOBO News widget displays news from an RSS feed.

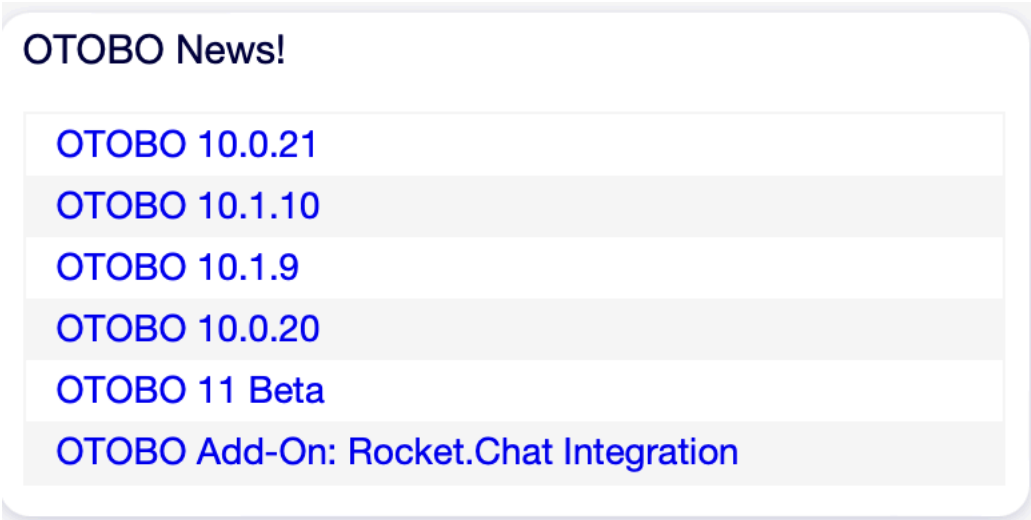
Figure 2.18:

Example RSS feed: DashboardBackend###0410-RSS

Figure 2.18: OTOBO News widget



2.18: Logged-In Users



2.19: OTOBO News Widget

Appointments

The screenshot shows a widget titled "Appointments". At the top, there is a blue button with a yellow plus sign and the text "New Appointment". Below the button, there are three filters: "Today (0)", "Tomorrow (0)", and "Soon (0)". Underneath the filters is a table with two columns: "START" and "TITLE". The table contains one row with the value "none" in the "TITLE" column.

START	TITLE
	none

Figure 2.20: Appointments





Figure 3.2: Personal Preferences Overview

### 3.2 Personal Preferences

Use this screen to set personal preferences in OTOBO. The personal preferences screen is available in the Personal Preferences menu item of the Avatar menu.

This overview screen consists of three modules.

- User Profile
- Notification Settings
- Miscellaneous

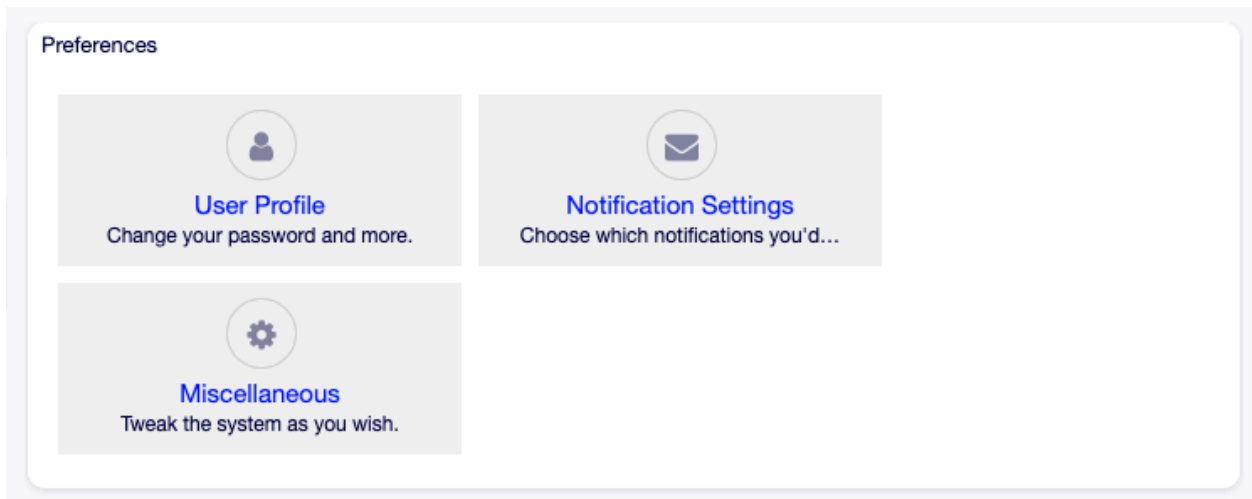


Figure 3.2: Personal Preferences Overview

Figure 3.2: Personal Preferences Overview

Figure 3.2: Personal Preferences Overview

#### 3.2.1 User Profile

Figure 3.2.1: User Profile Overview

Figure 3.2.1: User Profile Overview

Figure 3.2.1: User Profile Overview

Figure 3.2.1: User Profile Overview

Figure 3.2.1: User Profile Overview

Figure 3.2.1: User Profile Overview

**Change password**

Current password: <input style="width: 90%;" type="text"/>	Set a new password by filling in your current password and a new one.	<input checked="" type="checkbox"/>
New password: <input style="width: 90%;" type="text"/>		
Verify password: <input style="width: 90%;" type="text"/>		

3.3: Change password

2FA

2FA:

PreferencesGroups###GoogleAuthenticatorSecretKey  
 RFC6238  Google

**Google Authenticator**

Shared Secret: <input style="width: 80%;" type="text"/>	<input type="button" value="Generate"/>	Enter your shared secret to enable two factor authentication.	<input checked="" type="checkbox"/>

3.4: Google Authenticator

QR code A-Z0-92-7

2FA:

2FA

2FA widget

**Avatar**

<p>You can change your avatar image by registering with your email address <a href="mailto:jado@trash-mail.net">jado@trash-mail.net</a> at <a href="https://gravatar.com">gravatar.com</a>. Please note that it can take some time until your new avatar becomes available because of caching.</p>	<p>Change your avatar image.</p>	<input checked="" type="checkbox"/>
--	----------------------------------	-------------------------------------

3.5: Avatar

It is not possible to upload an avatar image directly in OTOBO. You have to register your email address on Gravatar to use this feature. Otherwise the first letters of first name and last name will be displayed.

2FA


Use this widget to set the language for the OTOBO user interface.



3.2.2

**My Queues**

Your queue selection of your preferred queues. You also get notified about those queues via email if enabled.




3.9:

Ticket::Service

**My Services**

Your service selection of your preferred services. You also get notified about those services via email if enabled.



3.10:

WEB

### Ticket notifications

NOTIFICATION	✉
Ticket create notification	<input checked="" type="checkbox"/>
Ticket follow-up notification (locked)	<input checked="" type="checkbox"/>
Ticket follow-up notification (unlocked)	<input checked="" type="checkbox"/>
Ticket lock timeout notification	<input checked="" type="checkbox"/>
Ticket queue update notification	<input checked="" type="checkbox"/>
Ticket service update notification	<input checked="" type="checkbox"/>

Choose for which kind of ticket changes you want to receive notifications. Please note that you can't completely disable notifications marked as mandatory.

✓

3.11: 通知設定

### Appointment notifications

NOTIFICATION	✉
Appointment reminder notification	<input checked="" type="checkbox"/>

Choose for which kind of appointment changes you want to receive notifications.

✓

3.12: 予約通知設定

設定

外部チャットチャンネル設定

外部チャットチャンネル WEBチャット設定

設定

ログ:

ChatEngine::Active ログ

外部チャットチャンネル設定ログ

外部チャットチャンネル設定ログ (Webチャット)

### My Chat Channels

Your selection of your preferred external chat channels. You will be notified about external chat requests in these chat channels.

✓

3.13: 外部チャットチャンネル設定

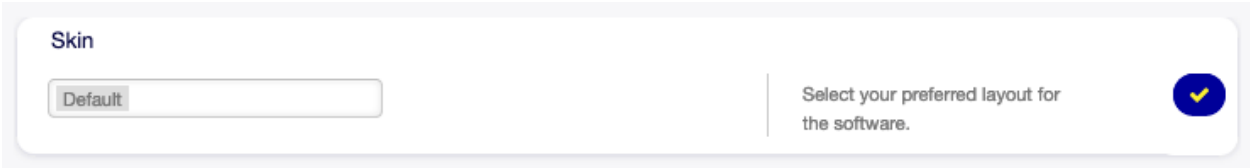
外部チャットチャンネル設定ログ

設定

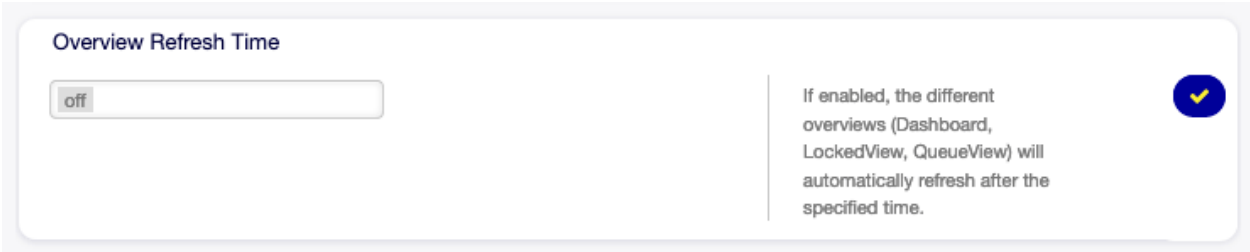
3.2.3

These settings are for change of visual appearance of OTOBO.

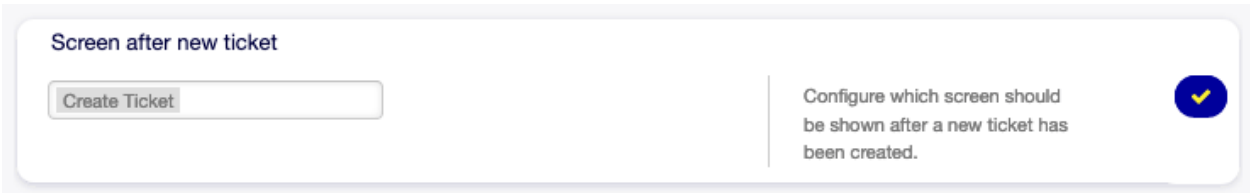
In this widget can be selected the skin, that OTOBO should wear.



3.14:



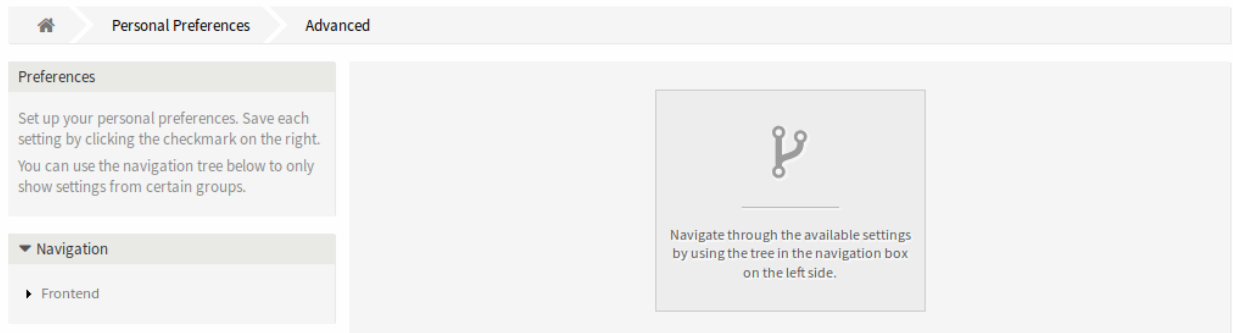
3.15:



3.16:

### 3.2.4

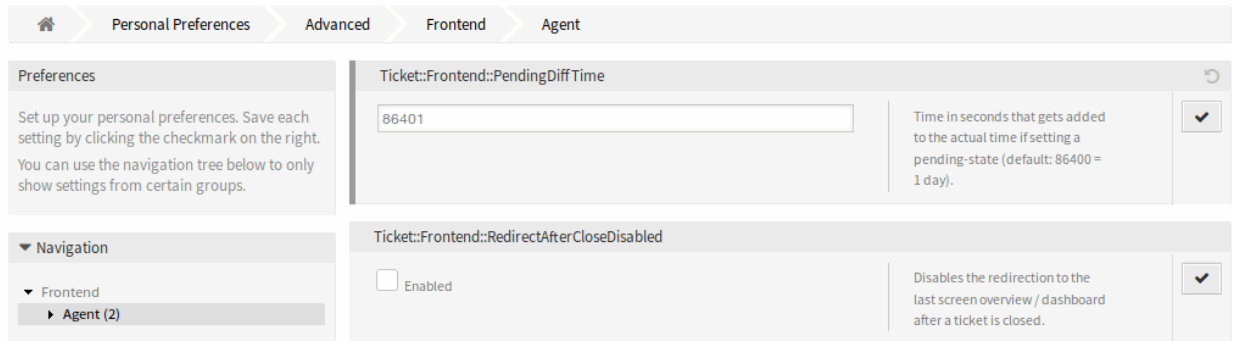
XXXXXXXXXXXXXXXXXXXXXXXXXXXX



3.17: XXXXXXXXXXXX

XXXXXXXXXXXX

1. XXXXXXXXXXXXXXXXXXXXXXXX
2. XXXXXXXXX
3. XXXXXXXXXXXXXXXXXXXXXXXX



3.18: XXXXXXXX - XXXXXXXX

XXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXX

1. XXXXXXXXXXXXXXXXXXXXXXXX

### 3.3

Use this menu item to leave OTOBO and go to the login screen.

XX: XXXXXXXXXXXXXXXXXXXXXXXX





Figure 4.2: Customer Information Center – Acme Inc. (acme.co)

Figure 4.2: Customer Information Center – Acme Inc. (acme.co)

**Customer Information Center – Acme Inc. (acme.co)**

**Customer Users**

[Add Customer User](#)

CUSTOMER USER ID	CUSTOMER USER INFORMATION	OPEN	CLOSED	PHONE TICKET	EMAIL TICKET	EDIT
we	"Wyle Coyote" <we@acme.example.com>	3	1	Create	Create	<a href="#">✎</a>

**Reminder Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

**Escalated Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

**New Tickets**

My locked tickets (0) | My responsibilities (0) | Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

**Open Tickets**

My locked tickets (2) | My responsibilities (3) | Tickets in My Queues (3) | Tickets in My Services (0) | All tickets (3)

TICKET#	AGE	TITLE
2020112549000027	7 d 20 h	Test Internal Helpdesk (Dynamic Field) Network Operations
2020112549000018	7 d 22 h	Test Internal Helpdesk (Dynamic Field)
2020111949000011	14 d 1 h	User cannot login to his mail account

**Company Status**

Escalated tickets: 0  
Open tickets: 3  
Closed tickets: 1  
All tickets: 4

**Customer Information**

Customer: Acme Inc.  
Comment: A great company

Figure 4.2: Customer Information Center

Figure 4.2: Customer Information Center

The Customer Users widget is used to list all customer users belong to the customer. It is possible to add or edit customer users, see the details and create tickets directly from the widget.

Figure 4.2: Customer Information Center

1. Add Customer User
2. Edit Customer User
3. Create Ticket

Figure 4.2: Customer Information Center

1. Add Customer User

Customer Users

[+ Add Customer User](#)

CUSTOMER USER ID	CUSTOMER USER INFORMATION	OPEN	CLOSED	PHONE TICKET	EMAIL TICKET	EDIT
we	"Wyle Coyote" <we@acme.example.com>	3	1	Create	Create	

4.3: Customer Users

1. Add Customer User
2. Edit Customer User

Customer User Information

1. Add Customer User
2. Edit Customer User

Customer User Information

1. Add Customer User
2. Edit Customer User

Customer User Information

1. Add Customer User
2. Edit Customer User

The following widgets display tickets related to a customer.

Each ticket widget has an own filter for displaying:

- All Tickets
- Escalated Tickets
- Closed Tickets

Escalated Tickets widget displays tickets that are past their service level agreement.

Reminder Tickets

My locked tickets (0) Tickets in My Queues (0) **All tickets (0)**

TICKET#	AGE	TITLE
none		

4.4: Escalated Tickets

The Escalated Tickets widget lists the escalated tickets. Escalated tickets are after the time set in service level agreement, and therefore need to be worked on them immediately.

Escalated Tickets widget displays tickets that are past their service level agreement.

Escalated Tickets widget displays tickets that are past their service level agreement.

Escalated Tickets				
My locked tickets (0)		Tickets in My Queues (0)		<b>All tickets (0)</b>
		TICKET#	AGE	TITLE
none				

4.5: Escalated Tickets

New Tickets				
My locked tickets (1)		Tickets in My Queues (0)		<b>All tickets (1)</b>
		TICKET#	▼ AGE	TITLE
■		2015071510123456	122 d 22 h	Welcome to OTRS!

4.6: New Tickets

XXXXXXXXXXXX

The following widgets are located on the right sidebar. There is a Settings widget to turn other widgets on or off, and some information widgets are also displayed here.

XXXXXXXXXXXXXXXXXXXX

XXXXXXXXXXXX

- XXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXX
- XX XXXX XXX

XXXX XXXXXXXXXXXXXXX

XXXX XXXXXXXXXXXXXXX

XX:

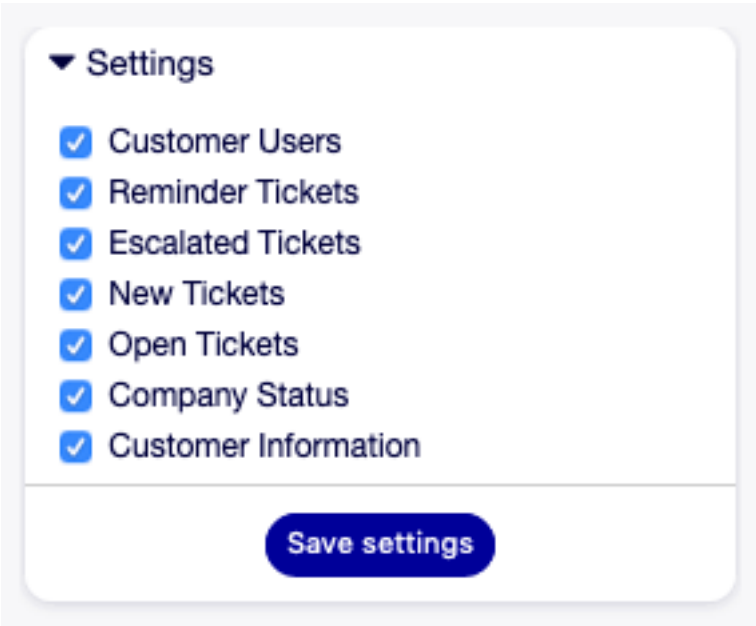
XXXXXXXXXX XXXX XXXX

## 4.2 XXXXXXXXXXXX

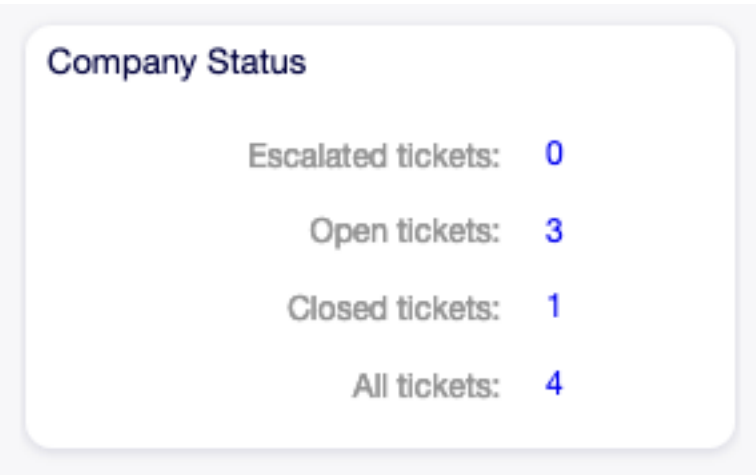
Customer user information center is a dashboard, which displays all relevant tickets and customers of a customer user. This dashboard has the same purpose as the agent dashboard: to see all relevant information at a glance.

Open Tickets				
My locked tickets (0)		Tickets in My Queues (0)		<b>All tickets (0)</b>
		TICKET#	▼ AGE	TITLE
none				

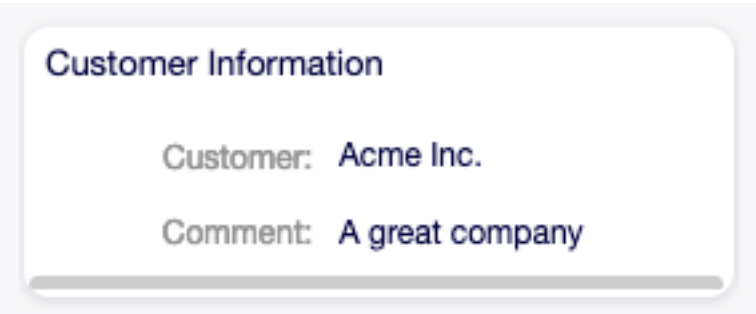
4.7: Open Tickets



4.8: Settings



4.9: Company Status



4.10: Customer Information

Customer User Information Center

### 4.2.1 Customer User Search

Clicking on the Customer User Information Center menu item will open a search dialog to search a customer user. At least two characters need to be entered here.



Figure 4.11: Customer User Search

Customer User: \* \*\*

Customer User Information Center

Customer User Information Center

Customer User:

Customer User Information Center

Customer User Information Center

Customer User Information Center

Customer User Information Center

1. Customer User Information Center
2. Customer User Information Center
3. Customer User Information Center

Customer User Information Center

1. Customer User Information Center
2. Customer User Information Center

Customer User Information Center

1. Customer User Information Center
2. Customer User Information Center

The following widgets display tickets related to a customer user.

Each ticket widget has an own filter for displaying:

- Customer User Information Center
- Customer User Information Center

Customer User Information Center — "Wyle Coyote" <we@acme.example.com>

Customer IDs

[Change Customer Relations](#)

CUSTOMER ID	NAME	OPEN	CLOSED	EDIT
acme.co	Acme Inc.	3	1	

Settings

Customer User Information

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: we@acme.example.com

Customer Information

Customer: Acme Inc.  
 Comment: A great company

Reminder Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

Escalated Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

New Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

Open Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (2) | My responsibilities (3) |

Tickets in My Queues (3) | Tickets in My Services (0) | All tickets (3)

TICKET#	AGE	TITLE
2020112549000027	7 d 20 h	Test Internal Helpdesk (Dynamic Field) Network Operations
2020112549000018	7 d 22 h	Test Internal Helpdesk (Dynamic Field)
2020111949000011	14 d 1 h	User cannot login to his mail account

4.12: Customer User Information Center

Customer IDs

CUSTOMER ID	NAME	OPEN	CLOSED	EDIT
stark-industries	Stark Industries	0	0	

4.13: Customer ID

- [Access to My Tickets](#)
- [Access to My Tickets](#)
- [Access to My Tickets](#)

Access to My Tickets

### Reminder Tickets

**Assigned to customer user** | Accessible for customer user | **My locked tickets (0)** | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | All tickets (0)

TICKET#	AGE	TITLE
none		

4.14: Access to My Tickets

Access to My Tickets

### Escalated Tickets

**Assigned to customer user** | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | **All tickets (0)**

TICKET#	AGE	TITLE
none		

4.15: Access to My Tickets

Access to My Tickets

### New Tickets

**Assigned to customer user** | Accessible for customer user | My locked tickets (0) | My responsibilities (0) |

Tickets in My Queues (0) | Tickets in My Services (0) | **All tickets (0)**

TICKET#	▼ AGE	TITLE
none		

4.16: Access to My Tickets

Access to My Tickets

Access to My Tickets

Access to My Tickets

Access to My Tickets

Access to My Tickets



Open Tickets

Assigned to customer user | Accessible for customer user | My locked tickets (2) | My responsibilities (3) |

Tickets in My Queues (3) | Tickets in My Services (0) | **All tickets (3)**

	TICKET#	▼ AGE	TITLE
■	<a href="#">2020112549000027</a>	7 d 20 h	Test Internal Helpdesk (Dynamic Field) Network Operations
■	<a href="#">2020112549000018</a>	7 d 22 h	Test Internal Helpdesk (Dynamic Field)
■	<a href="#">2020111949000011</a>	14 d 1 h	User cannot login to his mail account

4.17: Tickets list

▼ Settings

- Customer IDs
- Customer User Information
- Reminder Tickets
- Escalated Tickets
- New Tickets
- Open Tickets
- Customer Information

Save settings

4.18: Settings panel

1. Add a customer user to the system.
2. Add a customer user to the system.
3. Add a customer user to the system.

Customer User Information

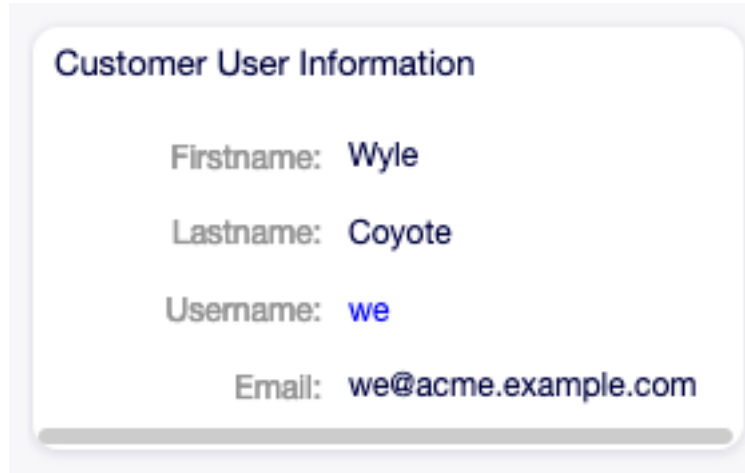


Figure 4.19: Customer User Information

Customer Information

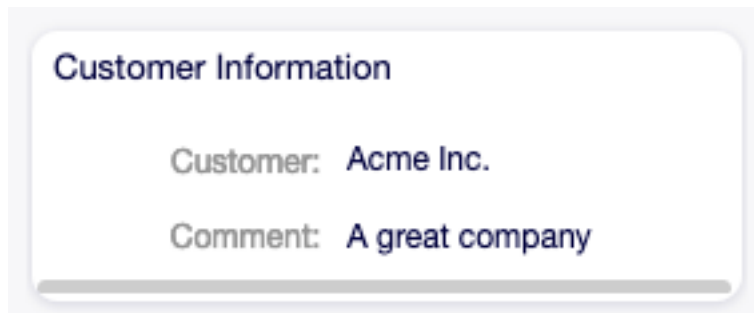


Figure 4.20: Customer Information

OT:

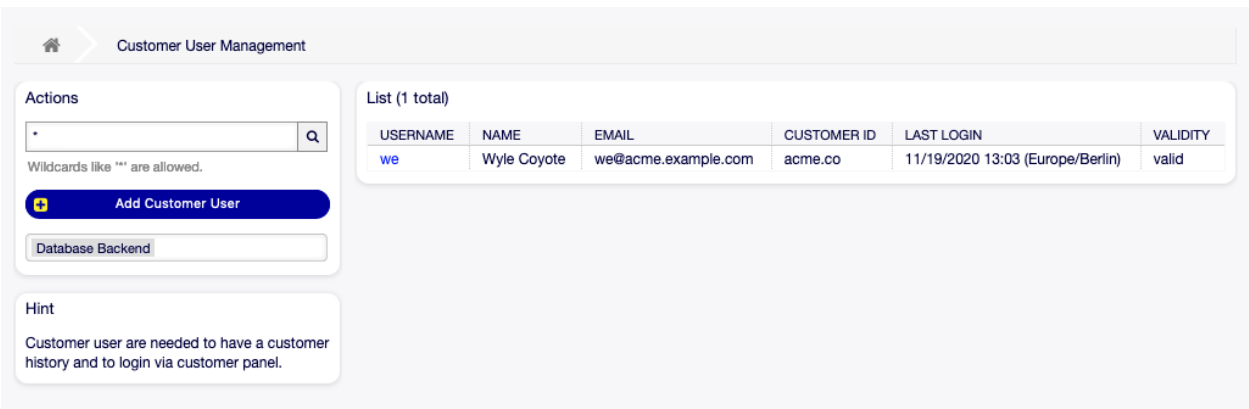
Customer User Administration

### 4.3 Customer User Administration

Customer User Administration

OTOBO offers a great way to save individual information about contacts within organizations which your company serves. You can add as many personal connections into OTOBO as needed.

Use this screen to add a customer user to the system. A fresh OTOBO installation contains no customer users by default. The customer user management screen is available in the Customer User Administration menu item of the Customers menu.



4.21: Customer User Management

4.3.1 Customer User Management

1. Click on the 'Add Customer User' button.

2. Select the 'Database Backend' dropdown menu.

3. Enter the user details.

1. Enter the username and password.
2. Enter the name and email.
3. Select the customer ID.

4. Click on the 'Add Customer User' button.

5. Verify the user details.

1. Check the username and password.
2. Check the name and email.
3. Check the customer ID.

6. Click on the 'Database Backend' dropdown menu.

1. Select the database backend.
2. Click on the 'Add Customer User' button.

7. The user is added successfully.

8. The user is listed in the table.

9.

10. The user is added successfully.

**Add Customer User**

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

\* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

\* Valid:

Google Authenticator:

Enter your shared secret to enable two factor authentication. WARNING: Make sure that you add the shared secret to your generator application and the application works well. Otherwise you will be not able to login anymore without the two factor token.Shared Secret

Interface language:

Select the main interface language.Language

Time Zone:

Select your personal time zone. All times will be displayed relative to this time zone.Time Zone

Ticket overview:

Select after which period ticket overviews should refresh automatically.Refresh interval

Number of displayed tickets:

Select how many tickets should be shown in overviews by default.Tickets per page

PGP Key:  Keine Datei ausgewählt.

Upload your PGP key.PGP Key

**Save** or Cancel

**Edit Customer User**

Title or salutation:

\* Firstname:

\* Lastname:

\* Username:

Password:

\* Email:

\* CustomerID:

Phone:

Fax:

Mobile:

Street:

Zip:

City:

Country:

Comment:

\* Valid:

Google Authenticator:

Enter your shared secret to enable two factor authentication. WARNING: Make sure that you add the shared secret to your generator application and the application works well. Otherwise you will be not able to login anymore without the two factor token.Shared Secret

Interface language:

Select the main interface language.Language

Time Zone:

Select your personal time zone. All times will be displayed relative to this time zone.Time Zone

Ticket overview:

Select after which period ticket overviews should refresh automatically.Refresh interval

Number of displayed tickets:

Select how many tickets should be shown in overviews by default.Tickets per page

PGP Key:  Keine Datei ausgewählt.

Upload your PGP key.PGP Key

**Save** or **Save and finish** or **Cancel**

**Effective Permissions for Customer User**

**Group Permissions**

GROUP	RO	RW
users	✓	✓

Table above shows effective group permissions for the customer user. The matrix takes into account all inherited permissions (e.g. via customer groups). Note: The table does not consider changes made to this form without submitting it.

**Customer Access**

CUSTOMER	DIRECT
acme.co Acme Inc.	✓

Table above shows granted customer access for the customer user by permission context. The matrix takes into account all inherited access (e.g. via customer groups). Note: The table does not consider changes made to this form without submitting it.

4.24:

:

### 4.3.2

:

Mr.Dr.Jr.

\*

\*

\*

**Email \***

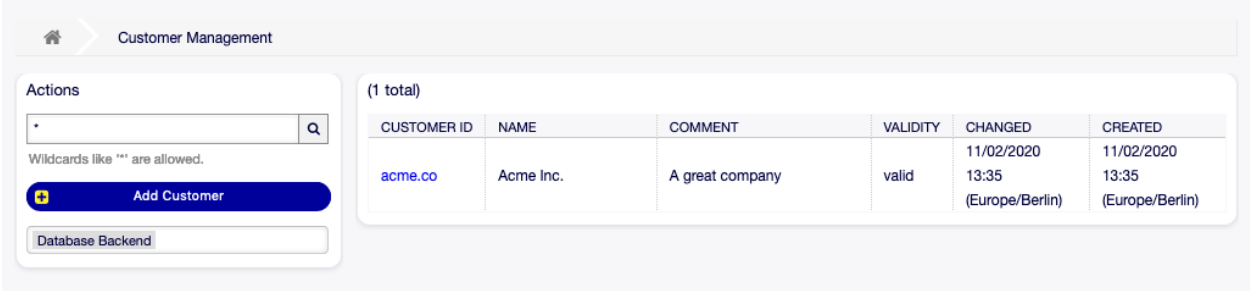
\*

/

\* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

### 4.4

Use this screen to add customer companies to the system. A fresh OTOBO installation contains no customers by default. The customer management screen is available in the Customer Administration menu item of the Customers menu.



4.25: Screenshot

#### 4.4.1

LDAP

Steps:

1. Step 1
2. Step 2
3. Step 3

LDAP

Steps:

1. Step 1
2. Step 2
3. Step 3

Steps:

1. Step 1
2. Step 2

LDAP

Add Customer

★ CustomerID:

★ Customer:

Street:

Zip:

City:

Country:

URL:

Comment:

★ Valid:

**Save** or Cancel

4.26: Add Customer

Edit Customer

★ CustomerID:

★ Customer:

Street:

Zip:

City:

Country:

URL:

Comment:

★ Valid:

**Save** or **Save and finish** or Cancel

4.27: Edit Customer



4.4.2 资源

资源ID \* 资源名称 资源描述

资源ID \* 资源名称 资源描述

资源 \* 资源名称 资源描述 资源ID 资源名称 资源描述

资源 资源名称

资源 资源名称

资源 资源名称

资源 资源名称 资源ID/资源名称

资源 资源名称URL

资源 资源名称 资源ID 资源名称 资源描述

资源 \* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.





OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

## 5.1 Calendars

OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

### Calendar Overview

Actions

Calendar

No calendars found. Please add a calendar first by using Manage Calendars page.

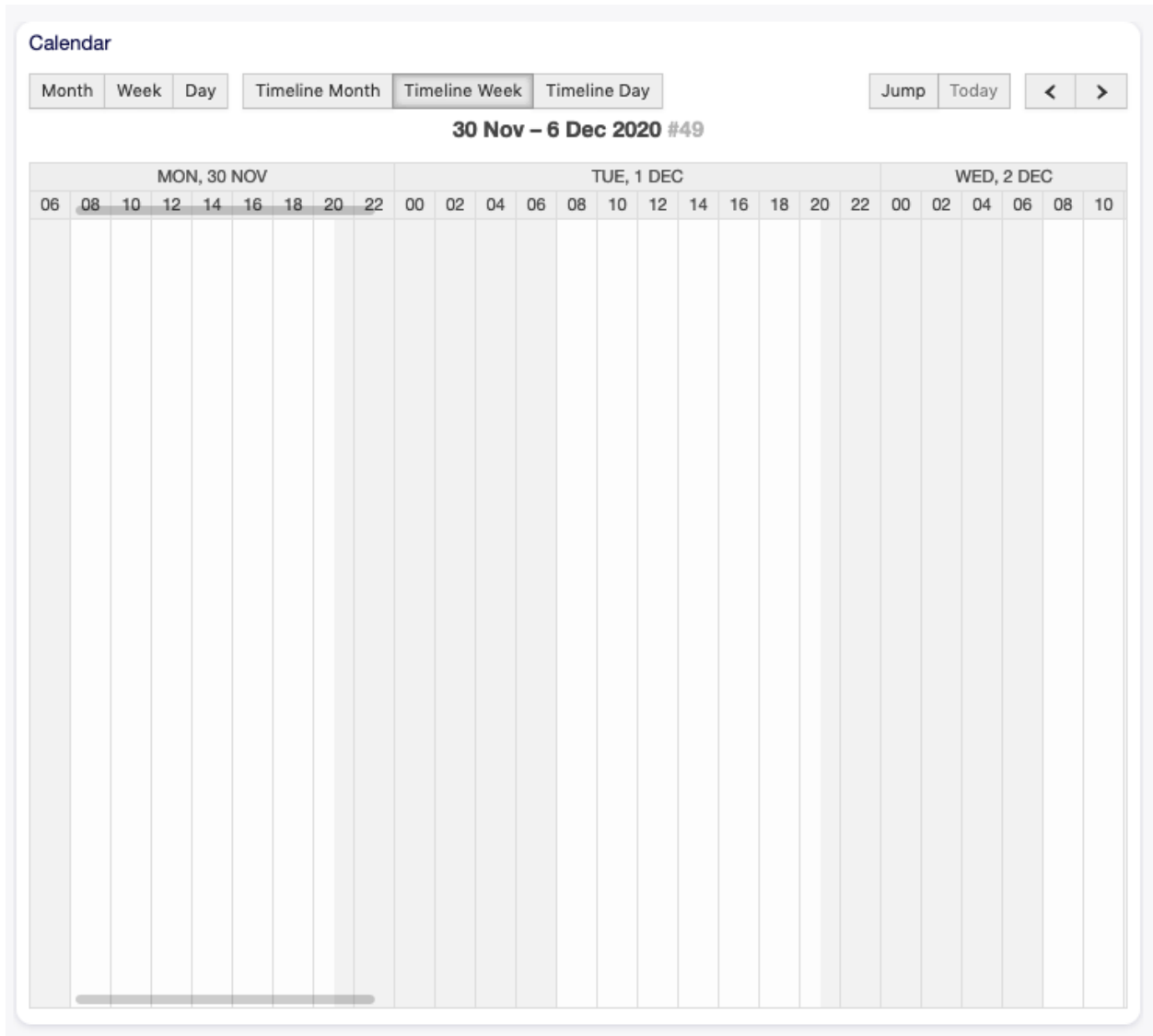
Figure 5.1: Calendar Overview

OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

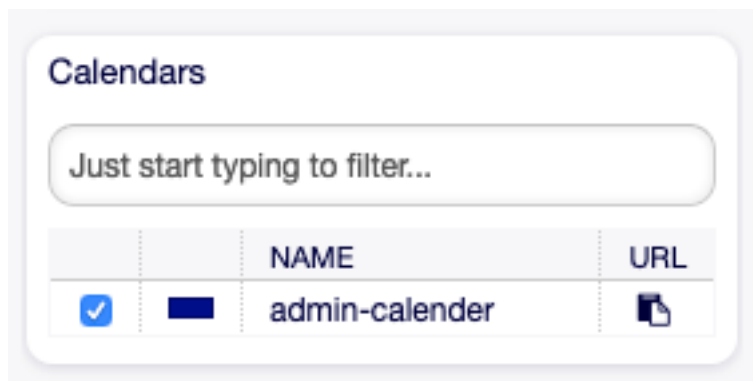
OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

OTOBOT supports this requirement with calendars. Calendars allow management of appointments and resources inside the ticket system. You can connect your tickets to scheduled tasks and make them available to all users to see. This feature adds transparency to show your team's workload and prevent users from promising resources which are not available.

1. Go to the `Calendar` page in the OTOBOT interface.
2. Click on the `Manage Calendars` button.
3. Add a new calendar by providing a name and a URL.



5.2: 日历



5.3: 日历列表

注意： 请仔细阅读以下说明，以确保设备正常运行。

本手册适用于 OTOBO 设备 / 系统。请仔细阅读以下说明，以确保设备正常运行。

请按照以下步骤操作：

1. 检查设备是否通电。
2. 检查设备是否连接。
3. 检查设备是否启动。

注意：

请按照以下步骤操作：

请按照以下步骤操作：

1. 检查设备是否通电。
2. 检查设备是否连接。
3. 检查设备是否启动。

请按照以下步骤操作：

1. 检查设备是否通电。
2. 检查设备是否连接。

请按照以下步骤操作：

1. 检查设备是否通电。
2. 检查设备是否连接。
3. 检查设备是否启动。

## 5.2 配置

请按照以下步骤操作：  
请按照以下步骤操作：

注意： 请仔细阅读以下说明，以确保设备正常运行。

请按照以下步骤操作：

## 5.3 配置

注意： Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact [sales@otobo.de](mailto:sales@otobo.de), we will find a solution.

Appointment✕

---

**Basic information**

---

\* Title:

Description:

Location:

\* Calendar:

---

**Resource**


---


This feature is currently not available.

---

**Date/Time**

---

Start date:  /  /   -  :

End date:  /  /   -  :

All-day:

Repeat:

---

**Notification**

---

Notification:

---

**Link**

---

Ticket:

5.4: Appointment

### Appointment ✕

---

**Basic information**

\* Title:

Description:

Location:

\* Calendar:


---


**Resource**

This feature is currently not available.

---

**Date/Time**

Start date:  /  /   -  :

End date:  /  /   -  :

All-day:

Repeat:

---

**Notification**

Notification:

---

**Link**

Ticket:

5.5: Appointment

**Agenda Overview**

Month Week Day

Manage Calendars Add Appointment 11/23/2020 – 11/29/2020 #48 Today < >

CALENDAR	TITLE	START DATE	END DATE	ALL-DAY	REPEAT	NOTIFICATION
No data found.						

5.6: 1000000

**Agenda Overview**


Month Week Day

Manage Calendars Add Appointment 11/30/2020 – 12/06/2020 #49 Today < >

CALENDAR	TITLE	START DATE	END DATE	ALL-DAY	REPEAT	NOTIFICATION
12/03/2020						
admin-calender	Customer Meeting	12/03/2020 18:00:00 (Europe/Berlin)	12/03/2020 19:00:00 (Europe/Berlin)	No	No	No

5.7: 1000000

x



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[Find out more](#)

5.8: 1000000



### 5.4

Use this menu item to add new appointments to calendars. New appointments can be also added by clicking on the Add Appointment button either in [calendar] or in [appointment] screens. It is also possible to drag over a range of the calendar widget to setup a rough time span. Right after that, a dialog appears where the data can be inserted.

#### 5.4.1

```

[calendar] * [calendar] [calendar] [calendar] [calendar]
[calendar] [calendar] [calendar] [calendar] [calendar]
[calendar] [calendar] [calendar] [calendar] [calendar] Google [calendar]
[calendar]:
[calendar] AgentAppointmentEdit::Location::Link [calendar]
[calendar] * [calendar]
[calendar]

```

[calendar]: Rother OSS TODO: This feature will be included in one of the next OTOBO releases. If you need it beforehand, please contact [sales@otobo.de](mailto:sales@otobo.de), we will find a solution.

```

[calendar] [calendar]
[calendar] [calendar]
[calendar] [calendar] [calendar] [calendar] [calendar] 00:00
[calendar] [calendar] [calendar] [calendar]
[calendar] [calendar] [calendar] [calendar]
[calendar]:
[calendar] [calendar] [calendar] [calendar]
[calendar] [calendar] [calendar] [calendar]
[calendar]: [calendar]* [calendar]**[calendar]

```

#### [calendar]

If appointments need to be created in a recurring manner, it is possible to setup detailed information about the occurrences of an appointment.

- ```

[calendar]

```
1. [calendar] [calendar] [calendar] [calendar]
  2. [calendar] [calendar] [calendar] [calendar]
  3. [calendar] [calendar]

## Appointment



### Basic information

\* Title:

Description:

Location:

\* Calendar:

### Resource

This feature is currently not available.

### Date/Time

Start date:  /  /  -  :

End date:  /  /  -  :

All-day:

Repeat:

### Notification

Notification:

### Link

Ticket:

5.9: 5.9.1

Date/Time

Start date: 12 / 01 / 2020 - 08 : 00

End date: 12 / 01 / 2020 - 16 : 00

All-day:

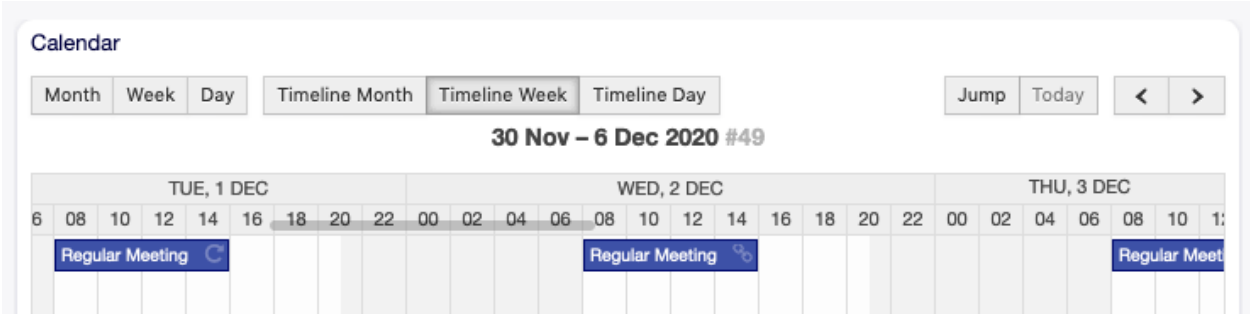
Repeat: Every Day

until ...

12 / 06 / 2020

5.10: 5.10

Placeholder text line



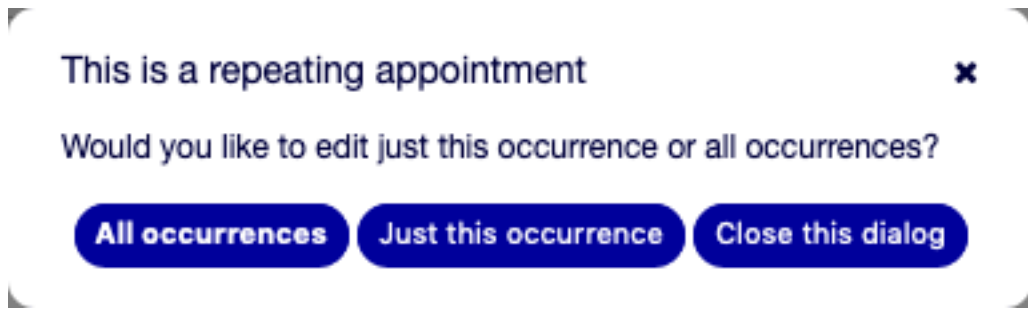
5.11: 5.11

Placeholder text block

Placeholder text block

Placeholder text block

Placeholder text block



5.12: Screenshot

Ticket systems such as OTOBO handle tickets like normal emails. The messages are saved in the system. When a customer sends a request, a new ticket is generated by the system which is comparable to a new medical report being created. The response to this new ticket is comparable to a doctor's entry in the medical report. A ticket is closed if an answer is sent back to the customer, or if the ticket is separately closed by the system. If a customer responds again on an already closed ticket, the ticket is reopened with the new information added.

## 6.1 6.1.1

6.1.1.1

6.1.1.2

6.1.1.3

6.1.1.4

6.1.1.5

6.1.1.6

6.1.1.7

6.1.1.8

6.1.1.9

6.1.1.10

### 6.1.1 6.1.1.1

6.1.1.1.1

6.1.1.1.2

**Ticket#2020111949000011 – User cannot login to his mail account**

Back | Lock | Priority | Change Ticket | People | Communication | Pending | Close | Quick Close | Miscellaneous |

- Move -

▼ Article Overview - 1 Article(s)

| NO. | ★ | ⇄ | SENDER      | VIA   | SUBJECT                       | CREATED          |  |
|-----|---|---|-------------|-------|-------------------------------|------------------|--|
| 1   |   | ← | Wyle Coyote | Phone | User cannot login to his mail | 11/19/2020 13:07 |  |

▼ #1 – User cannot login to his mail account – Wyle Coyote – 11/19/2020 13:07 (Europe/Berlin) vi...

To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS).

Mark | Print | Split | Forward | Reply

The user reports outlook will not accept his password.

▼ Ticket Information

Age: 14 d 21 h  
 Created: 11/19/2020 13:07 (Europe/Berlin)  
 Created by: Super Admin  
 State: open  
 Locked: unlock  
 Priority: 3 normal  
 Queue: Misc  
 Customer ID: [acme.co](#)  
 Accounted time: 0  
 Owner: Super Admin  
 Responsible: Admin OTOBO

▼ Customer Information

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: [we@acme.example.com](mailto:we@acme.example.com)  
 Customer: Acme Inc.  
 Street: 123 Anywhere St.  
 Zip: 12346  
 City: Somevillage  
 Country: United States of [...]  
 URL: [https://acme.exam\[...\]](https://acme.exam[...])  
 Comment: A great company  
 Open tickets (customer) (3)

6.1:

**QueueView: Raw**

My Queues (0) Misc (3/1) **Raw (4/3)**

All tickets 4 Available tickets 3

Bulk 1-4 of 4

6.2:

QueueView: Misc

My Queues (0) Misc (3/1) Raw (4/3)

All tickets 3 Available tickets 1

Bulk 1-3 of 3 S M L

| <input type="checkbox"/> |   | TICKET#            | ▲ AGE     | SENDER      | TITLE                                                     | STATE | LOCK   | QUEUE | OWNER       | CUSTOMER ID |
|--------------------------|---|--------------------|-----------|-------------|-----------------------------------------------------------|-------|--------|-------|-------------|-------------|
| <input type="checkbox"/> | ■ | 2020111949000011   | 14 d 21 h | Wyle Coyote | User cannot login to his mail account                     | open  | unlock | Misc  | Super Admin | acme.co     |
| <input type="checkbox"/> | ■ | ★ 2020112549000018 | 8 d 18 h  | Wyle Coyote | Test Internal Helpdesk (Dynamic Field)                    | open  | lock   | Misc  | Admin OTOBO | acme.co     |
| <input type="checkbox"/> | ■ | ★ 2020112549000027 | 8 d 15 h  | Wyle Coyote | Test Internal Helpdesk (Dynamic Field) Network Operations | open  | lock   | Misc  | Admin OTOBO | acme.co     |

Powered by Rother OSS

6.3: 票の操作

1. 票の検索
2. 票の追加
3. 票の更新

票の検索

1. 票の検索
2. 票の検索条件
3. 票の検索結果
4. 票の検索結果

票の追加

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

To sort tickets:

1. 票の検索
2. 票の検索

票の検索条件

票の検索結果

1. 票の検索結果
2. 票の検索結果

票の検索結果

票の検索結果

票の検索結果

Unlock a ticket to give it back to the queue.

QueueView: Misc

My Queues (0) Misc (3/1) Raw (4/3)

All tickets 3 Available tickets 1

Bulk | Lock | Zoom | History | Priority | Note | Close | Quick Close | - Move -

1-3 of 3 S M L

1. Click on the ticket ID.

2. Click on the ticket ID.

3. Click on the ticket ID.

4. Close this ticket.

**Quick Close** Close this ticket by one click.

5. Click on the ticket ID.

### 6.1.2 Ticket details

6.1.2.1 Ticket details

QueueView: Misc

My Queues (0) Misc (3/1) Raw (4/3)

All tickets 3 Available tickets 1

Bulk | Order by "Age" (descending)

1-3 of 3 S M L

**Ticket#2020111949000011 – User cannot login to his mail account**

|                                                      |                                                         |                       |                               |                            |
|------------------------------------------------------|---------------------------------------------------------|-----------------------|-------------------------------|----------------------------|
| <b>Sender</b><br>Wyle Coyote                         | <b>Age</b><br>14 d 21 h                                 | <b>Queue</b><br>Misc  | <b>Customer ID</b><br>acme.co | <b>First Response Time</b> |
| <b>Created</b><br>11/19/2020 13:07:51 (Europe/...)   | <b>State</b><br>open                                    |                       | <b>Update Time</b>            |                            |
| <b>Subject</b><br>User cannot login to his mail a... | <b>Owner / Responsible</b><br>Super Admin / Admin OTOBO | <b>Lock</b><br>unlock |                               | <b>Solution Time</b>       |

6.4: Ticket details

6.4.1 Ticket details

1. Click on the ticket ID.
2. Click on the ticket ID.
3. Click on the ticket ID.

6.4.2 Ticket details

### 6.1.3 Ticket details

6.1.3.1 Ticket details

6.1.3.2 Ticket details

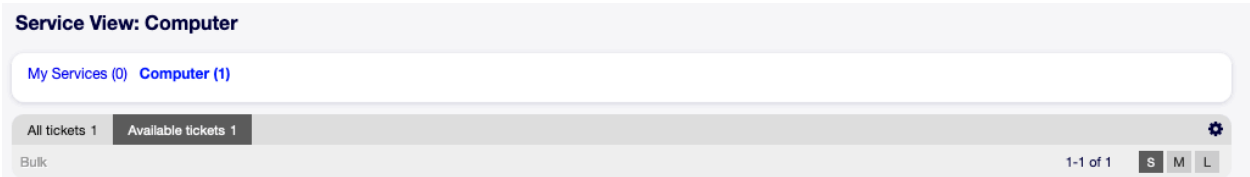
1. Click on the ticket ID.
2. Click on the ticket ID.
3. Click on the ticket ID.







...small M ...medium L ...large

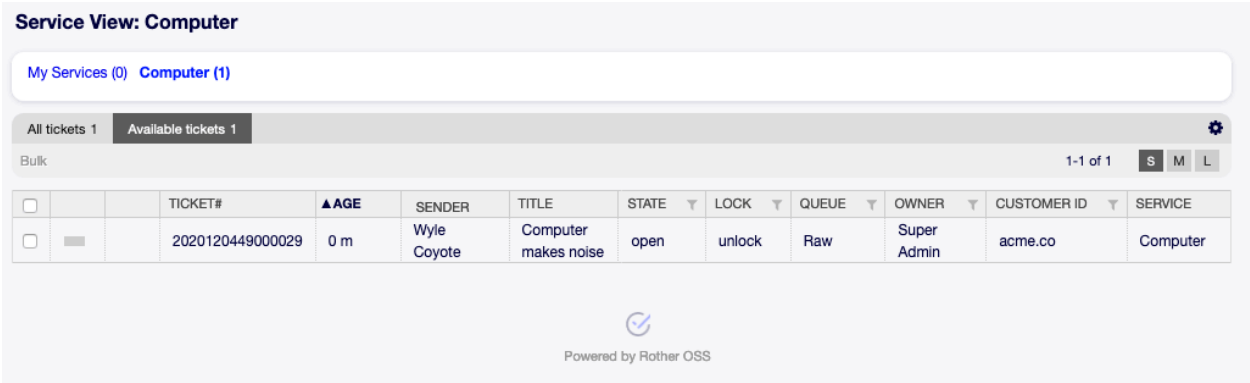


6.9: ...

...
...
...
...

6.2.1 ...

...



6.10: ...

- 1. ...
2. ...
3. ...

- 1. ...
2. ...
3. ...
4. ...

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

To sort tickets:

1. Select the attribute to sort by.
2. Select the sort order.

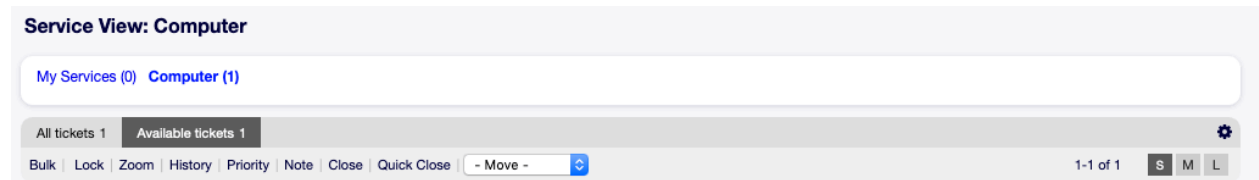
It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

To sort tickets:

1. Select the attribute to sort by.
2. Select the sort order.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.



It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

Unlock a ticket to give it back to the queue.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

Close this ticket.

**Quick Close** Close this ticket by one click.

The ticket can be moved to an other queue..

### 6.2.2 Ticket Actions

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

1. Select the ticket to act on.
2. Select the action to perform.
3. Confirm the action.

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

**Service View: Computer**

My Services (0) **Computer (1)**

All tickets 1 Available tickets 1

Bulk | Order by "Age" (descending) 1-1 of 1 S M L

|                          |                                                       |                                                         |                       |                               |
|--------------------------|-------------------------------------------------------|---------------------------------------------------------|-----------------------|-------------------------------|
| <input type="checkbox"/> | <b>Ticket#2020120449000029 – Computer makes noise</b> |                                                         |                       |                               |
| <input type="checkbox"/> | <b>Sender</b><br>Wyle Coyote                          | <b>Age</b><br>6 m                                       | <b>Queue</b><br>Raw   | <b>Customer ID</b><br>acme.co |
|                          | <b>Created</b><br>12/04/2020 15:38:36 (Europe/...     | <b>State</b><br>open                                    |                       | <b>Update Time</b>            |
|                          | <b>Subject</b><br>Computer makes noise                | <b>Owner / Responsible</b><br>Super Admin / Super Admin | <b>Lock</b><br>unlock | <b>Service</b><br>Computer    |
|                          |                                                       |                                                         |                       | <b>First Response Time</b>    |
|                          |                                                       |                                                         |                       | <b>Solution Time</b>          |

6.11: [Screenshot]

**Service View: Computer**

My Services (0) **Computer (1)**

All tickets 1 Available tickets 1

Bulk | Order by "Age" (descending) 1-1 of 1 S M L

|                          |                                                       |                                                         |                       |                               |                                                                          |
|--------------------------|-------------------------------------------------------|---------------------------------------------------------|-----------------------|-------------------------------|--------------------------------------------------------------------------|
| <input type="checkbox"/> | <b>Ticket#2020120449000029 – Computer makes noise</b> |                                                         |                       |                               | Lock   Zoom   History   Priority   Note   Close   Quick Close   - Move - |
| <input type="checkbox"/> | <b>Sender</b><br>Wyle Coyote                          | <b>Age</b><br>6 m                                       | <b>Queue</b><br>Raw   | <b>Customer ID</b><br>acme.co | <b>First Response Time</b>                                               |
|                          | <b>Created</b><br>12/04/2020 15:38:36 (Europe/...     | <b>State</b><br>open                                    |                       | <b>Update Time</b>            |                                                                          |
|                          | <b>Subject</b><br>Computer makes noise                | <b>Owner / Responsible</b><br>Super Admin / Super Admin | <b>Lock</b><br>unlock | <b>Service</b><br>Computer    | <b>Solution Time</b>                                                     |

6.12: [Screenshot]

### 6.2.3



6.13:

- 1.
- 2.
- 3.



6.14:

### 6.2.4

**Ticket Bulk Action** Cancel & close

▶ Add Note

▶ Send Email

Next state:

Queue:

Owner:

Responsible:

Priority:

Merge:  Merge to Ticket#:   Merge to oldest

Link together:

Link to parent:

Unlock tickets:

**Execute Bulk Action**

6.15:

### 6.3

**Status View: Open tickets**

Open tickets 9 Closed tickets 1 ⚙

Bulk 1-9 of 9 S M L

6.16:

#### 6.3.1

- 1.
- 2.
- 3.

**Status View: Open tickets**

Open tickets 9 Closed tickets 1

Bulk 1-9 of 9 S M L

| <input type="checkbox"/> | TICKET#          | ▼AGE    | SENDER      | TITLE                  | STATE | LOCK   | QUEUE | OWNER       | CUSTOMER ID |
|--------------------------|------------------|---------|-------------|------------------------|-------|--------|-------|-------------|-------------|
| <input type="checkbox"/> | 2020120449000029 | 23 m    | Wyle Coyote | Computer makes noise   | open  | unlock | Raw   | Super Admin | acme.co     |
| <input type="checkbox"/> | 2020120449000011 | 5 h 9 m | Wyle Coyote | Computer doesn't start | open  | lock   | Raw   | Super Admin | acme.co     |

6.17: Ticket list

1. Ticket list

1. Ticket list
2. Ticket list
3. Ticket list
4. Ticket list

2. Ticket list

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

To sort tickets:

1. Ticket list
2. Ticket list

3. Ticket list

4. Ticket list

1. Ticket list
2. Ticket list

5. Ticket list

6. Ticket list

**Status View: Open tickets**

Open tickets 9 Closed tickets 1

Bulk Lock Zoom History Priority Note Close Quick Close - Move - 1-9 of 9 S M L

7. Ticket list

8. Unlock a ticket to give it back to the queue.

9. Ticket list

10. Ticket list

11. Ticket list

12. Close this ticket.



**Quick Close** Close this ticket by one click.

Figure 6.18: Quick Close

### 6.3.2 Ticket Actions

Figure 6.19: Ticket Actions

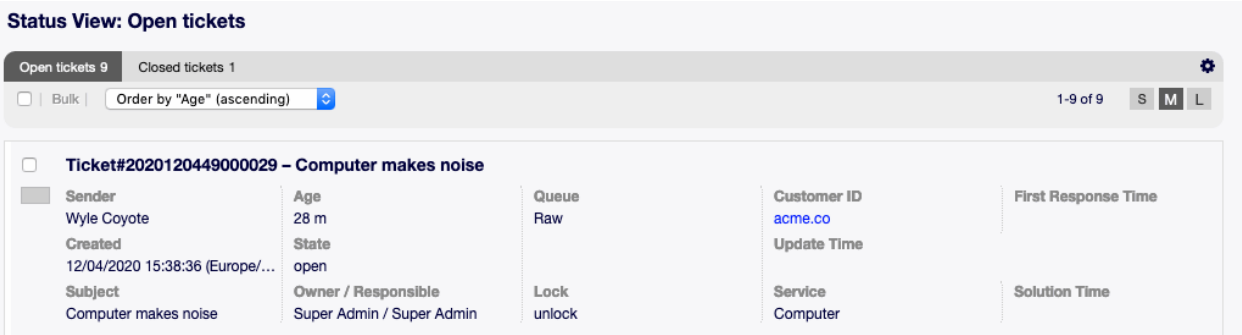


Figure 6.18: Quick Close

Figure 6.19: Ticket Actions

1. Ticket Actions
2. Ticket Actions
3. Ticket Actions

Figure 6.19: Ticket Actions

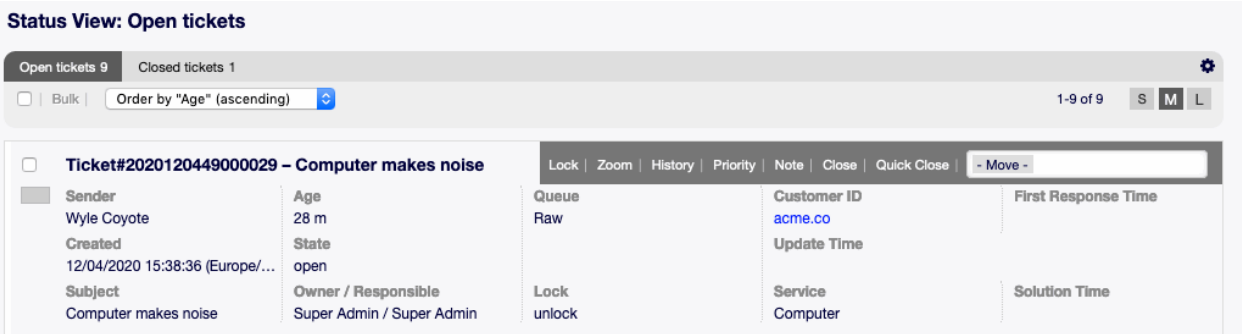


Figure 6.19: Ticket Actions

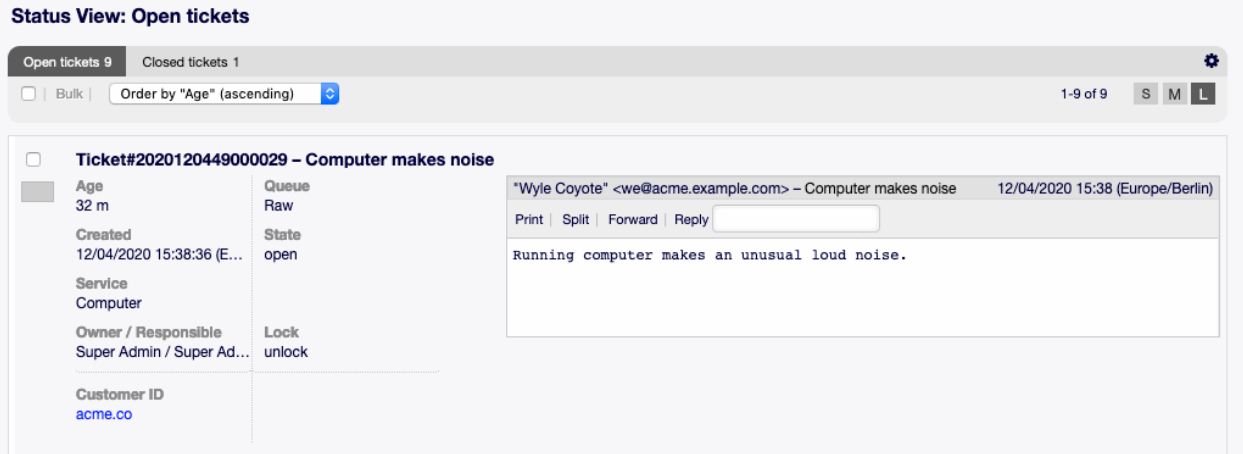
### 6.3.3 Ticket Actions

Figure 6.19: Ticket Actions

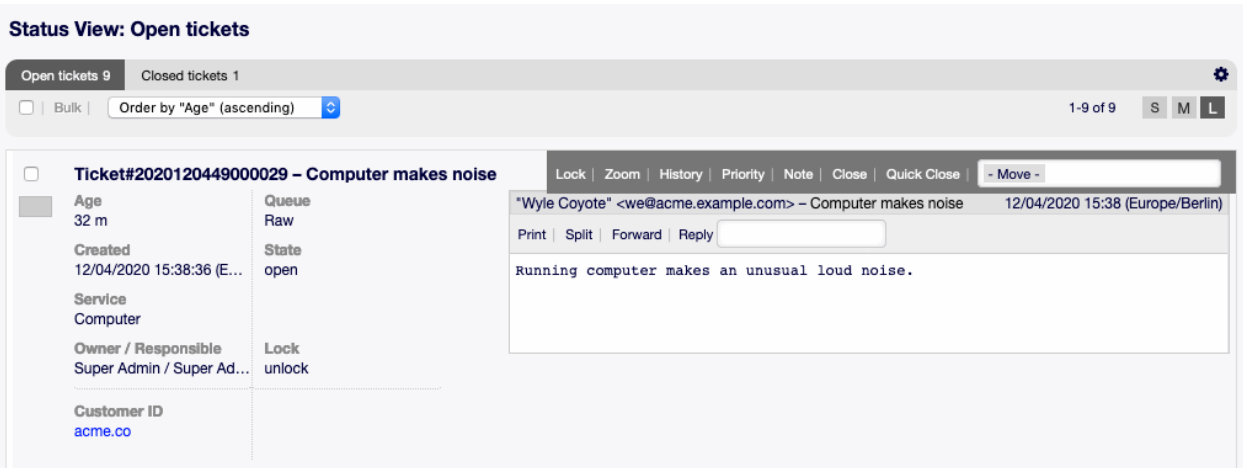
Figure 6.19: Ticket Actions

1. Ticket Actions
2. Ticket Actions
3. Ticket Actions

Figure 6.19: Ticket Actions



6.20: 



6.21: 

6.3.4

**Ticket Bulk Action** Cancel & close

▶ Add Note

▶ Send Email

Next state:

Queue:

Owner:

Responsible:

Priority:

Merge:  Merge to Ticket#:   Merge to oldest

Link together:

Link to parent:

Unlock tickets:

**Execute Bulk Action**

6.22:

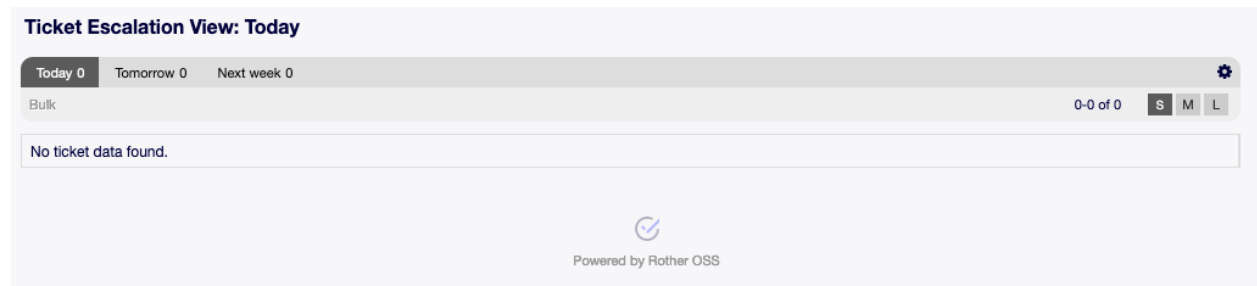
6.4

**Ticket Escalation View: Today**

Today 0 Tomorrow 0 Next week 0 0-0 of 0 S M L

6.23:

6.4.1



6.24: Ticket Escalation View

1. Ticket Escalation View
2. Ticket Escalation View
3. Ticket Escalation View

Ticket Escalation View

1. Ticket Escalation View
2. Ticket Escalation View
3. Ticket Escalation View
4. Ticket Escalation View

Tip: Ticket Escalation View

It is possible to sort tickets by a specific attribute, but not all attributes can be used for sort.

To sort tickets:

1. Ticket Escalation View
2. Ticket Escalation View

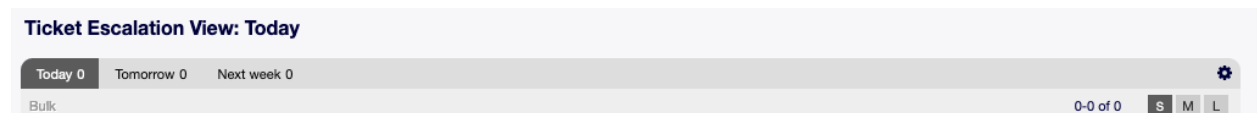
Ticket Escalation View

Ticket Escalation View

1. Ticket Escalation View
2. Ticket Escalation View

Tip: Ticket Escalation View

Ticket Escalation View



Tip: Ticket Escalation View

Tip: Unlock a ticket to give it back to the queue.

Tip: Ticket Escalation View

Click the Close icon.

Click the Close icon.

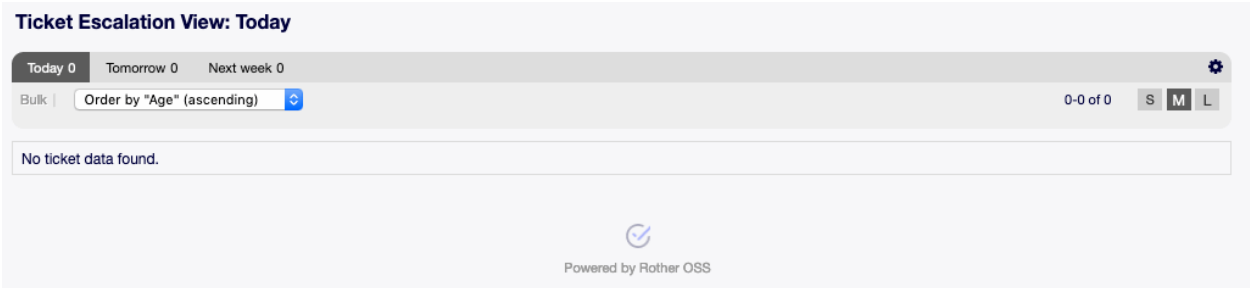
Close this ticket.

**Quick Close** Close this ticket by one click.

Click the Close icon.

### 6.4.2 Ticket Escalation

Click the Escalate icon.

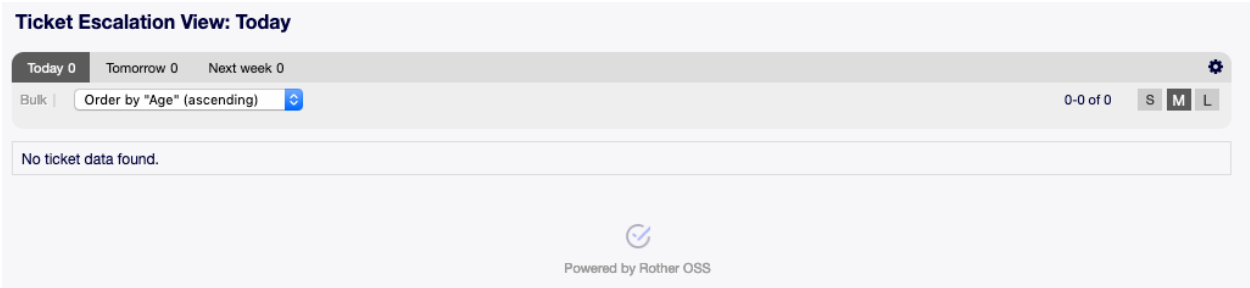


6.25: Ticket Escalation View

Click the Escalate icon.

1. Click the Escalate icon.
2. Click the Escalate icon.
3. Click the Escalate icon.

Click the Escalate icon. Click the Escalate icon. Click the Escalate icon.



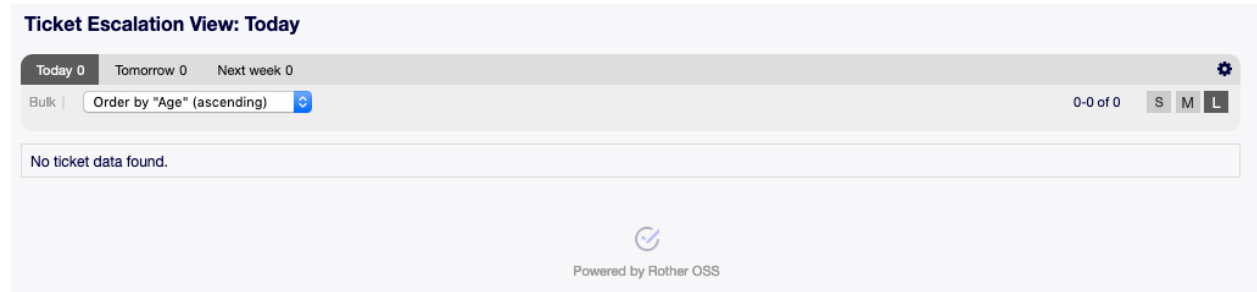
6.26: Ticket Escalation View

### 6.4.3 Ticket Escalation

Click the Escalate icon.

Click the Escalate icon.

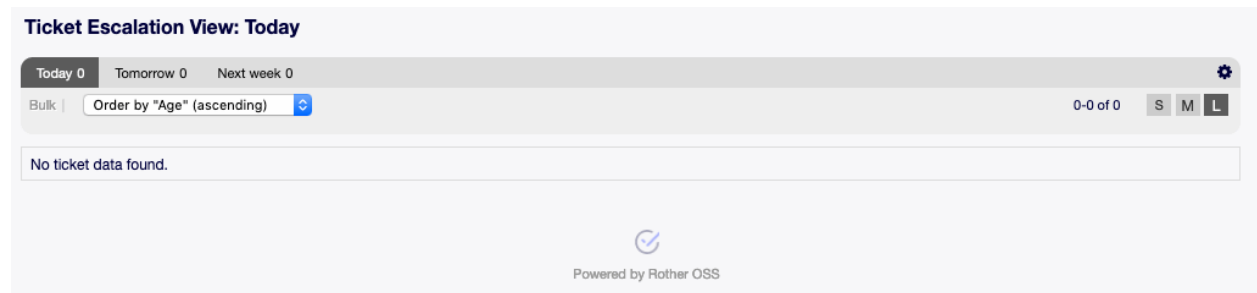
1. Click the Escalate icon.
2. Click the Escalate icon.



6.27: 検索結果

### 3. 検索結果

検索結果が表示される。検索結果が表示されない場合は、検索条件を確認してください。



6.28: 検索結果

## 6.4.4 検索結果

検索結果が表示される。

## 6.5 検索結果

検索結果が表示される。検索結果が表示されない場合は、検索条件を確認してください。

検索結果が表示される。

検索結果 \* 検索結果

---

検索結果: 検索結果\*検索結果\*\*検索結果

---

検索結果 \* 検索結果

検索結果 The service category of this ticket.

検索結果:

This field is available if Ticket::Service is enabled.

**Service Level Agreement** Select one of the Service Level Agreements if available.

**Ticket Bulk Action** Cancel & close

▶ Add Note

▶ Send Email

Next state:

Queue:

Owner:

Responsible:

Priority:

Merge:  Merge to Ticket#:   
 Merge to oldest

Link together:

Link to parent:

Unlock tickets:

**Execute Bulk Action**

6.29: Ticket Bulk Action

1. Select an agent responsible for the ticket.

2.

3. Ticket :: Responsible

1. Select an agent responsible for the ticket.

2. \*

3. Ticket :: Responsible

4. Ticket :: Responsible

5. Ticket :: Responsible

6. \*

7. Ticket :: Responsible

8. Ticket :: Responsible

9. Ticket :: Responsible

10. Ticket :: Responsible

11. Ticket :: Responsible

12. Ticket :: Responsible

### 6.6 Ticket Bulk Action

1. Select an agent responsible for the ticket.

2. Ticket :: Responsible

### Create New Phone Ticket

\* Customer user:    
 "Wyle Coyote" <we@acme.example.com>

\* To queue:

Service:

Service Level Agreement:

















Owner:  ↺

Responsible:  ↺

\* Subject:

Options: [\[ Customer user \]](#) [\[ FAQ \]](#)

Text Template:   
Setting a template will overwrite any text or attachment.

\* Text:   
 **B I U S** |   |   |    |   |   |   
 Format - Font - Size -    |  Source 

Attachments:    
 Click to select files or just drop them here.

Next ticket state:

Priority:

Time units (work units):

**+ Create**

#### Customer Information

Firstname: Wyle  
Lastname: Coyote  
Username: we  
Email: we@acme.example.com  
Customer: Acme Inc.  
Street: 123 Anywhere St.  
Zip: 12346  
City: Somevillage  
Country: United States of [...]  
URL: [https://acme.exam\[...\]](https://acme.exam[...])  
Comment: A great company  
**Open tickets (customer) (5)**

6.30: 



### Create New Email Ticket

\* To customer user:

To: Wyle Coyote <we@acme.example.com>

Cc:

Bcc:

\* From queue:

Service:

Service Level Agreement:

Owner:

Responsible:

Email security:

Sign:

Encrypt:

\* Subject:

Options: [\[ Customer user \]](#) [\[ FAQ \]](#)

Text Template:

\* Text:

Signature:

Attachments:

Next ticket state:

Priority:

Time units (work units):

**+ Send mail**

**Customer Information**

Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: we@acme.example.com  
 Customer: Acme Inc.  
 Street: 123 Anywhere St.  
 Zip: 12346  
 City: Somevillage  
 Country: United States of [...]  
 URL: https://acme.exam[...]  
 Comment: A great company  
**Open tickets (customer) (5)**





## 6.8

Search interface description

Searchx

---

**Templates**

Search template:

---

**Filters in use**

Fulltext:

---

**Additional filters**

Add another attribute:   
 Output:

6.34: Search interface

Search interface description

### 6.8.1

Search interface description

Search interface description

1. Search interface description
2. Search interface description
3. Search interface description
4. Search interface description

Search interface description

1. Search interface description
2. Search interface description

Search interface description

Search interface description

1. Search interface description

Search interface description

Search interface description

Search ✕

---

**Templates**

Search template:  ✕

[Create New](#) [Delete](#) [Profile link](#)

---

**Filters in use**

Fulltext:  ✕

---

**Additional filters**

Add another attribute:

Output:

[🔍 Run search](#)

6.35: Screenshot of search filters

**Search Results:**

Change search options (last-search) ⚙️

Bulk 1-2 of 2 [S](#) [M](#) [L](#)

| <input type="checkbox"/> |   | TICKET#          | ▼ AGE    | SENDER      | TITLE                  | STATE | LOCK   | QUEUE | OWNER       | CUSTOMER ID |
|--------------------------|---|------------------|----------|-------------|------------------------|-------|--------|-------|-------------|-------------|
| <input type="checkbox"/> | ■ | 2020120449000029 | 1 h 16 m | Wyle Coyote | Computer makes noise   | open  | unlock | Raw   | Super Admin | acme.co     |
| <input type="checkbox"/> | ■ | 2020120449000011 | 6 h 2 m  | Wyle Coyote | Computer doesn't start | open  | lock   | Raw   | Super Admin | acme.co     |

6.36: Screenshot of search results table

## 6.8.2 6.8.2

## 6.8.3 6.8.3

## 6.9 6.9

**Ticket#202011194900011 – User cannot login to his mail account**

Back | Lock | Priority | Change Ticket | People | Communication | Pending | Close | Quick Close | Miscellaneous |

▼ Article Overview - 1 Article(s)

| NO. | ★ | ⇄ | SENDER      | VIA   | SUBJECT                       | CREATED          | 🔍 |
|-----|---|---|-------------|-------|-------------------------------|------------------|---|
| 1   |   | ← | Wyle Coyote | Phone | User cannot login to his mail | 11/19/2020 13:07 |   |

▼ #1 – User cannot login to his mail account – Wyle Coyote – 11/19/2020 13:07 (Europe/Berlin) vi...

To open links in the following article, you might need to press Ctrl or Cmd or Shift key while clicking the link (depending on your browser and OS). ✖

Mark | Print | Split | Forward | Reply

The user reports outlook will not accept his password.

▼ Ticket Information

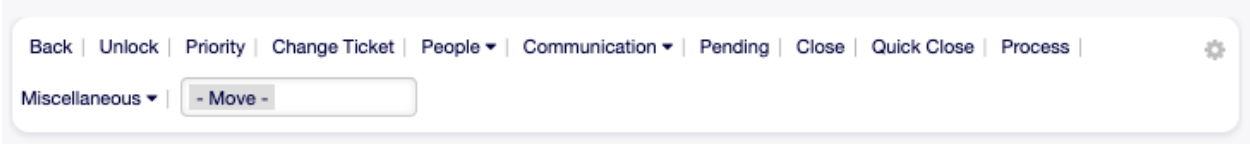
- Age: 14 d 21 h
- Created: 11/19/2020 13:07 (Europe/Berlin)
- Created by: Super Admin
- State: open
- Locked: unlock
- Priority: 3 normal
- Queue: Misc
- Customer ID: [acme.co](#)
- Accounted time: 0
- Owner: Super Admin
- Responsible: Admin OTOBO

▼ Customer Information

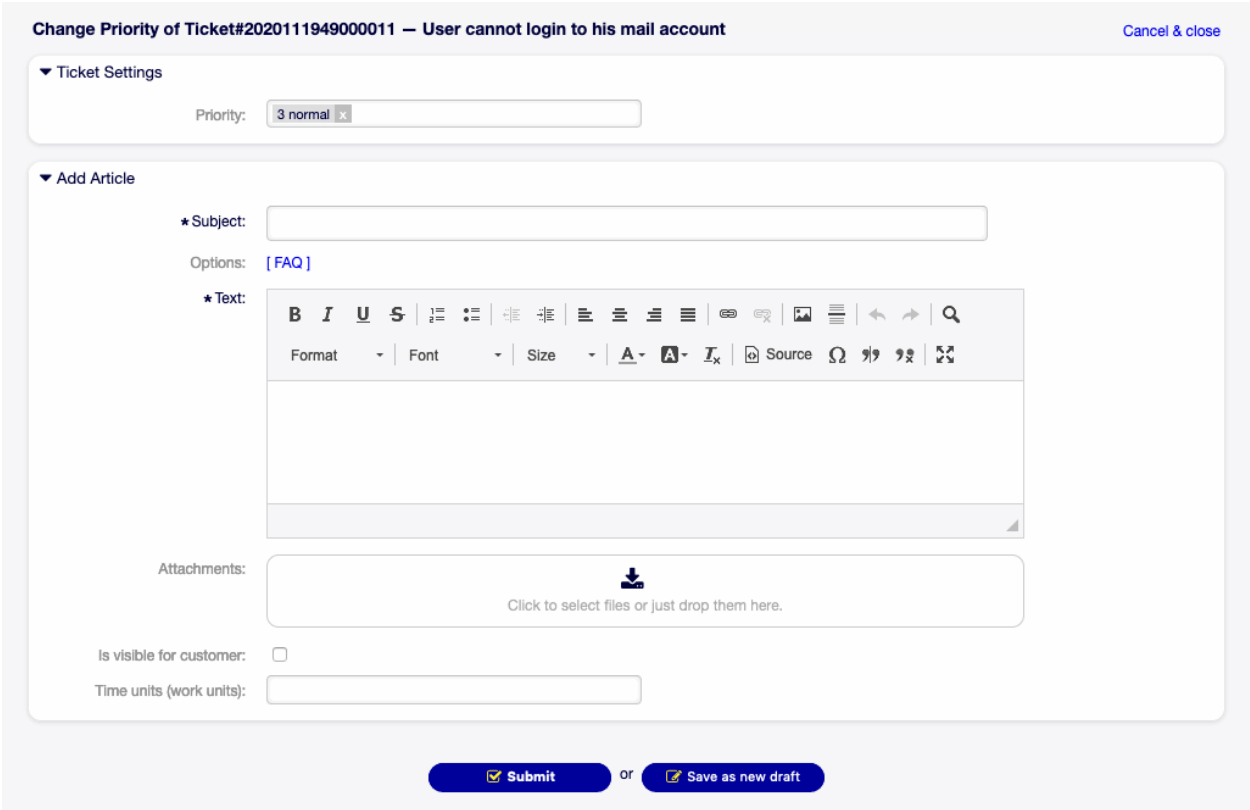
- Firstname: Wyle
- Lastname: Coyote
- Username: we
- Email: [we@acme.example.com](mailto:we@acme.example.com)
- Customer: Acme Inc.
- Street: 123 Anywhere St.
- Zip: 12346
- City: Somevillage
- Country: United States of [...]
- URL: [https://acme.exam\[...\]](https://acme.exam[...])
- Comment: A great company
- 🔴 [Open tickets \(customer\) \(3\)](#)

6.37: 6.37

6.9.1



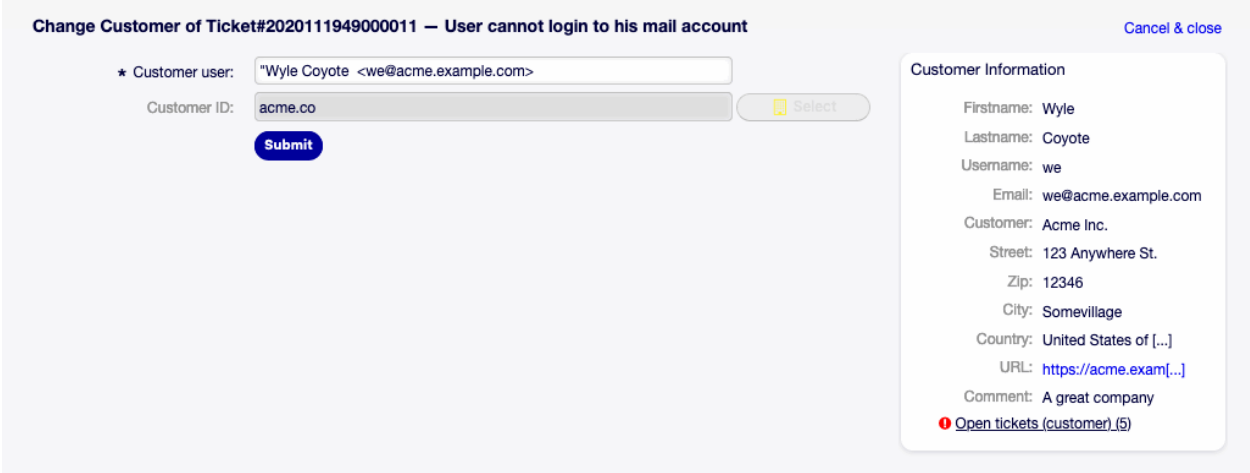
6.38:



6.39:







6.41: Screenshot

\* Customer user: "Wyle Coyote <we@acme.example.com>  
 Customer ID: acme.co Select  
 Submit

**Customer Information**  
 Firstname: Wyle  
 Lastname: Coyote  
 Username: we  
 Email: we@acme.example.com  
 Customer: Acme Inc.  
 Street: 123 Anywhere St.  
 Zip: 12346  
 City: Somevillage  
 Country: United States of [...]  
 URL: https://acme.exam[...]  
 Comment: A great company  
 Open tickets (customer) (5)

**Add Note to Ticket#2020111949000011 – User cannot login to his mail account** Cancel & close

▼ Ticket Settings

Service:

Service Level Agreement:

▼ Add Article

\*Subject:

Options: [\[ FAQ \]](#)

\*Text:

**B I U S** | | | |

Format - | Font - | Size - | | Source

Attachments:

Is visible for customer:

Time units (work units):

or

6.42: Screenshot



**Outbound Email for Ticket#2020111949000011 – User cannot login to his mail account** Cancel & close

From: OTOBO System <otobo@localhost>

★ To:

Cc:

Bcc:

★ Subject:

Email security:

Sign:

Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Encrypt:

Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Options: [\[FAQ\]](#)

★ Text:

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | | | | Source | | |

Your Ticket-Team

Super Admin

--

Super Support - Waterford Business Park  
5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA  
Email: hot@example.com - Web: <http://www.example.com/>

--

6.44: Screenshot

OTOBOTicket#202011194900011

You can select a customer user from OTOBO or any valid email address can be added here.

OTOBOTicket#202011194900011

\* Ticket Settings

FAQ

\* Ticket Settings

OTOBOTicket#202011194900011

OTOBOTicket#202011194900011

OTOBOTicket#202011194900011

OTOBOTicket#202011194900011

OTOBOTicket#202011194900011

OTOBOTicket#202011194900011

**Set Pending Time for Ticket#202011194900011 – User cannot login to his mail account** Cancel & close

▼ Ticket Settings

Next state:

Pending date:   For all pending\* states.

▼ Add Article

★ Subject:

Options: [FAQ]

★ Text:

**B I U S** | | | | | | | | | | | | |

Format | Font | Size | | | | | | | |

Attachments:

Is visible for customer:

Time units (work units):

or

6.45: Ticket Settings

OTOBOTicket#202011194900011

OTOBOTicket#202011194900011









Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

Click \* to view the details of the article.

Click \* to view the details of the article.

Click \* to view the details of the article.

Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

TO: [Redacted email address]

Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

### 6.9.2 Article

Click on the following link to view the details of the article.

▼ Article Overview - 1 Article(s)

| NO. | ★ | ≡ | SENDER      | VIA   | SUBJECT                       | CREATED          | 🔗 |
|-----|---|---|-------------|-------|-------------------------------|------------------|---|
| 1   |   | ← | Wyle Coyote | Phone | User cannot login to his mail | 11/19/2020 13:07 |   |

Figure 6.51: Article List

Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

- Click on the following link to view the details of the article.
- Click on the following link to view the details of the article.
- Click on the following link to view the details of the article.

TO: [Redacted email address]

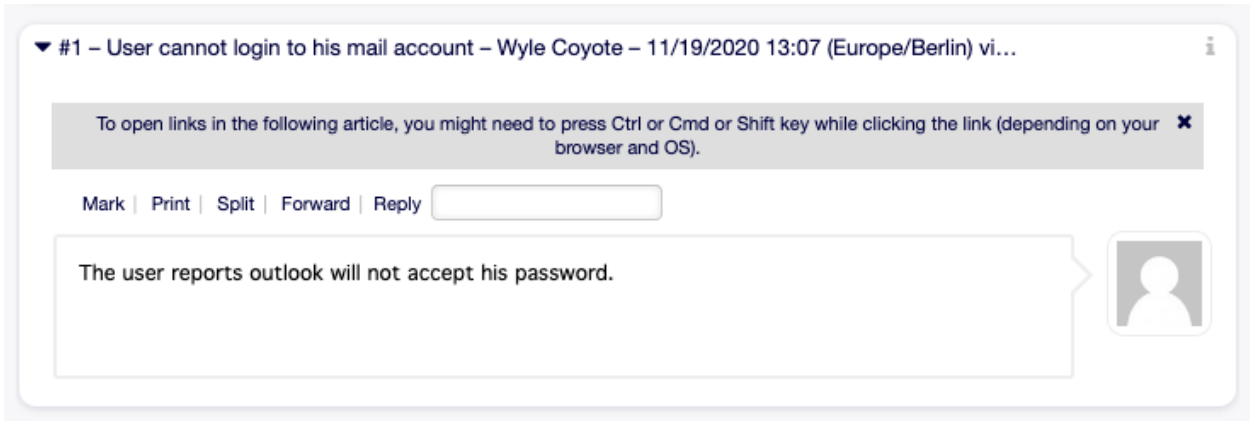
### 6.9.3 Article

Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

Click on the following link to view the details of the article.

Click on the following PDF link to view the details of the article.



6.52: Screenshot of email interface

1. Select the 'Split' button in the email interface.



6.53: Split dialog box

1. Select the 'Split' button in the email interface.

2. Enter a valid email address or customer user name in the target field.

3. Click the 'Split' button.

4. The email is split into two separate messages.

---

Tip: You can select a customer user from OTOBO or any valid email address can be added here.

---

1. Select the 'Split' button in the email interface.

2. Enter a valid email address or customer user name in the target field.

3. Click the 'Split' button.

4. The email is split into two separate messages.

5. The email is split into two separate messages.

---

Tip: You can select a customer user from OTOBO or any valid email address can be added here.



XXXXXXXXXX\*XX XXXXXXXX\*\*XXXXXXXXXXXX

---

XX \* XXXXXXXXXXXXXXXXXXXX

XX XXXXXXXXXXXXXXXXXXXXFAQXXXXXXXXXXXX

XX \* XXXXXXXXXXXXXXXXXXXX

XX XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXXXXXX XXXXXXXXXXXXXXXXXXXX

XXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX

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XXXX XXXXXXXXXXXXXXXXXXXX

XXXX \* XXXXXXXX XX XX

XX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

---

XX: You can select a customer user from OTOBO or any valid email address can be added here.

XXXXXXXXXX\*XX XXXXXXXX\*\*XXXXXXXXXXXX

---

XX \* XXXXXXXXXXXXXXXXXXXX

XX XXXXXXXXXXXXXXXXXXXXFAQXXXXXXXXXXXX

XX \* XXXXXXXXXXXXXXXXXXXX

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XXXXXXXX XXXXXXXXXXXXXXXXXXXX

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### 6.9.4 XXXXX

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

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XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

XX:

LinkObject::ViewMode XX XX XXXXXXXXXXXXXXXXXXXX

### 6.9.5 XXXXX

XXXXXXXXXXXXXXXXXXXX

**Compose Answer for Ticket#2020111949000011 – User cannot login to his mail account** Cancel & close

From: OTOBO System <otobo@localhost>

★ To:

To: "Wyle Coyote" <we@acme.example.com>

Cc:

Bcc:

★ Subject: **Re: [Ticket#2020111949000011] User cannot login to his mail account**

Email security:

Sign:

Keys/certificates will only be shown for a sender with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Encrypt:

Keys/certificates will only be shown for recipients with more than one key/certificate. The first found key/certificate will be pre-selected. Please make sure to select the correct one.

Options: [\[ FAQ \]](#)

★ Text:

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | | | | | | | |

Dear Wyle Coyote,

Thank you for your request.

Your Ticket-Team

Super Admin

--

Super Support - Waterford Business Park  
 5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA  
 Email: hot@example.com - Web: <http://www.example.com/>

--

Attachments:

Next ticket state:

Visible for customer:

Time units (work units):

Send mail or Save as new draft

6.55: [Screenshot]

▼ Linked: FAQ (1)

| FAQ#  | TITLE                          | STATE               | CREATED                             | LINKED AS | DELETE |
|-------|--------------------------------|---------------------|-------------------------------------|-----------|--------|
| 49002 | How to create a support bundle | external (customer) | 11/18/2020 15:43:26 (Europe/Berlin) | Normal    |        |

6.56: [Screenshot]

▼ Linked: FAQ (1)

| FAQ#                  | TITLE                          | STATE               | CREATED                             | LINKED AS | DELETE |
|-----------------------|--------------------------------|---------------------|-------------------------------------|-----------|--------|
| <a href="#">49002</a> | How to create a support bundle | external (customer) | 11/18/2020 15:43:26 (Europe/Berlin) | Normal    |        |

6.57:

▼ Ticket Information

Age: 74 d 1 h

Created: 09/21/2020 17:08 (Europe/Berlin)

State: new

Locked: lock

Priority: 3 normal

Queue: Raw

Customer ID:

Accounted time: 0

Owner: Admin OTOBO

Responsible: Admin OTOBO

6.58:

6.9.6

▼ Customer Information

Firstname: Wyle

Lastname: Coyote

Username: we

Email: we@acme.example.com

Customer: Acme Inc.

Street: 123 Anywhere St.


Zip: 12346

City: Somevillage

Country: United States of [...]

URL: [https://acme.exam\[...\]](https://acme.exam[...])

Comment: A great company

 [Open tickets \(customer\)\\_ \(5\)](#)

6.59: Customer Information





### FAQ

Creating FAQ articles should be done based on customer tickets. A good knowledge base contains all relevant information, that occurs during ticket handling. FAQ articles can be easily attached to new tickets in any ticket or article creation screens. This can help agents to shorten the time when answering a ticket.

## 7.1

FAQ FAQ FAQ FAQ

### 7.1.1 FAQ

FAQ

FAQ

FAQ FAQ FAQ FAQ

FAQ

1. FAQ
2. FAQ
3. FAQ

FAQ FAQ

### FAQ Explorer

FAQ

Subcategories

| NAME | COMMENT      | SUBCATEGORIES | FAQ ARTICLES |
|------|--------------|---------------|--------------|
| Misc | Misc Comment | 0             | 2            |

**FAQ Articles: FAQ**

0-0 of 0

No FAQ data found.

**Latest created FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Latest updated FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Top 10 FAQ articles**

- [Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)
- [How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

7.1: FAQ Explorer

### FAQ Explorer

FAQ > Misc

Subcategories

| NAME                    | COMMENT | SUBCATEGORIES | FAQ ARTICLES |
|-------------------------|---------|---------------|--------------|
| No subcategories found. |         |               |              |

**FAQ Articles: Misc**

1-2 of 2

| FAQ#  | TITLE                          | LANGUAGE | STATE               | VALIDITY |
|-------|--------------------------------|----------|---------------------|----------|
| 49002 | How to create a support bundle | en       | external (customer) | valid    |
| 49001 | Computer is dead               | en       | external (customer) | valid    |

**Latest created FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Latest updated FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Top 10 FAQ articles**

- [Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)
- [How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

7.2: FAQ Explorer

7.1.2 FAQ

FAQ Top 10

**Latest created FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Latest updated FAQ articles**

[How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

[Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

**Top 10 FAQ articles**

1. [Computer is dead](#)  
Misc - en - external (customer) - 11/18/2020 15:30 (Europe/Berlin)

2. [How to create a support bundle](#)  
Misc - en - external (customer) - 11/18/2020 15:43 (Europe/Berlin)

7.3: FAQ

FAQ

FAQ

FAQ Top 10

FAQ

1. FAQ
- 2.
- 3.

FAQ 10.1

## 7.2

FAQ 10.1

\* 10.1

FAQ 10.1

\* 10.1

:

10.1

FAQ 10.1

(10.1) 10.1

(10.1) 10.1

(10.1) 10.1

Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

10.1

:

10.1

FAQ 10.1

10.1

10.1

10.1

FAQ 10.1

## 7.3

FAQ 10.1

FAQ 10.1

1. 10.1
2. 10.1
3. 10.1

FAQ 10.1

### Add FAQ Article

All fields marked with an asterisk (\*) are mandatory.

\* Title:

Keywords:

\* Category:

State:

Validity:

Language:

Attachment: 

  
 Click to select files or just drop them here.

Symptom: (public)

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | **A** | | | Source | | | |

Problem: (public)

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | **A** | | | Source | | | |

Solution: (public)

**B I U S** | | | | | | | | | | | | | | |

Format | Font | Size | **A** | | | Source | | | |

FAQ Journal:

1-3 of 3

| FAQ#  | TITLE                          | CATEGORY | ACTION  | TIME                                |
|-------|--------------------------------|----------|---------|-------------------------------------|
| 49002 | How to create a support bundle | Misc     | Updated | 11/18/2020 15:51:32 (Europe/Berlin) |
| 49002 | How to create a support bundle | Misc     | Created | 11/18/2020 15:43:26 (Europe/Berlin) |
| 49001 | Computer is dead               | Misc     | Created | 11/18/2020 15:30:56 (Europe/Berlin) |

Powered by Rother OSS

7.5: FAQ Journal

## 7.4 Languages

7.4.1: Languages Management

Use this screen to manage languages available in FAQ articles. A fresh OTOBO installation already contains some languages by default. The language management screen is available in the Language Management menu item of the FAQ menu.

> FAQ Language Management

Actions

[Add language](#)

List

| NAME | DELETE |
|------|--------|
| de   |        |
| en   |        |

7.6: FAQ Languages Management

### 7.4.1 Add FAQ Language

7.4.1.1: Add Language

1. Enter language name
2. Click Add
3. Language added

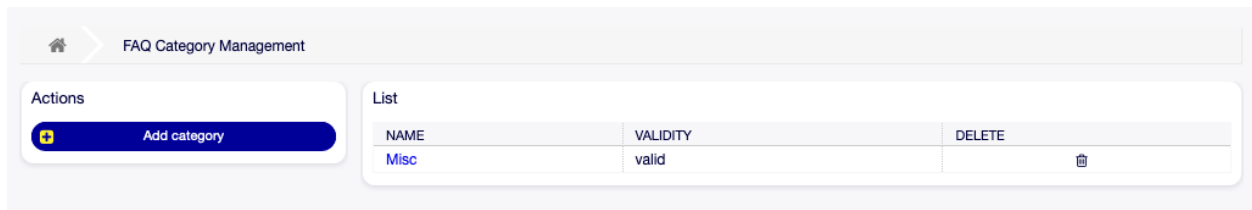
Add Language

\* Name:

[Submit](#) or [Cancel](#)

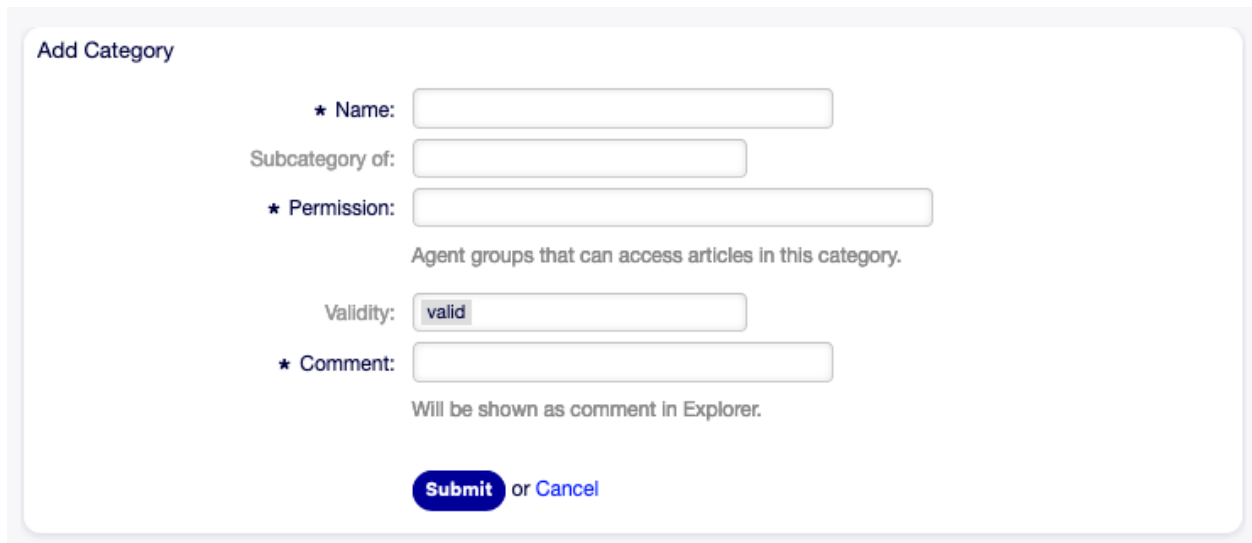
7.7: Add Language





7.10: FAQ

- 1.
- 2.
- 3.



7.11:

- 1.
- 2.
- 3.

- 1.
- 2.

### 7.5.2 FAQ

\*

\*



**Edit Category**

★ Name:

Subcategory of:

★ Permission:

Agent groups that can access articles in this category.

Validity:

★ Comment:

Will be shown as comment in Explorer.

or [Cancel](#)

7.12: Edit Category

**List**

| NAME | VALIDITY | DELETE |
|------|----------|--------|
| Misc | valid    |        |

7.13: Category List

Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

\*

## 7.6

FAQ FAQ FAQ

Searchx

---

**Templates**

Search template:

[Create New](#)

---

**Filters in use**

Fulltext:

---

**Additional filters**

Add another attribute:

Output:

[Run search](#)

7.14:

### 7.6.1

- 1.
- 2.
- 3.
- 4.
- 5.

- 1.
- 2.

- 1.





7.7.1 FAQ

FAQ

FAQ

FAQ

PDF PDF

This menu item opens the standard link screen of OTOBO. FAQ articles can be linked to other FAQ articles or tickets. Existing links can also be managed here.

FAQ

FAQ

FAQ FAQ

FAQ

7.7.2 FAQ

FAQ

FAQ

FAQ

:

LinkObject::ViewMode



History of FAQ#: 49002 - How to create a support bundle

Close

History Content

| ACTION  | USER             | CREATETIME                          |
|---------|------------------|-------------------------------------|
| Created | sa (Super Admin) | 11/18/2020 15:43:26 (Europe/Berlin) |
| Updated | sa (Super Admin) | 11/18/2020 15:51:32 (Europe/Berlin) |

7.19: FAQ History

Manage links for FAQ# 49002: How to create a support bundle

Close this dialog

Create new links
  Manage existing links

Link with:

FAQ#:

Title:

Fulltext:

7.20: Manage links for FAQ

**Delete** ✕

Title: **How to create a support bundle**

Do you really want to delete this FAQ article?

7.21: Delete FAQ Confirmation

**FAQ Information**

**Category:** Misc

**Keywords:** [support bundle generate OTOBO](#)

**State:** external (customer)

**Validity:** valid

**Language:** en

**Rating:** 0 out of 5

**Votes:** No votes found! Be the first one to rate this FAQ article.

**Created:** 11/18/2020 15:43  
(Europe/Berlin) (Super Admin)

**Changed:** 11/18/2020 15:51  
(Europe/Berlin) (Super Admin)

7.22: FAQ



Linked Objects

Normal

| OBJECT#            |
|--------------------|
| T:2015071510123456 |

7.23: Linked Objects

▼ Linked: Ticket (1)

| TICKET#                          | TITLE             | STATE | QUEUE | CREATED                             | LINKED AS | DELETE |
|----------------------------------|-------------------|-------|-------|-------------------------------------|-----------|--------|
| <a href="#">2015071510123456</a> | Welcome to OTOBO! | new   | Raw   | 09/21/2020 17:08:29 (Europe/Berlin) | Normal    |        |

7.24: Linked Tickets





**Manage Chats**

**Hints**

Please note: This tab will be used by any request which is related to chats. If you leave the chat manager (e.g. by using the navigation bar on top of the page), starting a new chat or other chat-related actions will possibly reload this tab any time. This means that it is recommended to leave the chat manager opened in this particular tab.

**Chat Integration**

You can easily integrate the chat into a web page. Just set up a few parameters and copy the integration code to your clipboard.

`</>` [Configure Chat Integration](#)

**General Chat Requests From Customers**

**My Chat Channels** | **All Chat Channels**

| CREATED                               | TYPE | CHANNEL | REQUESTER | DESCRIPTION | ACTION |
|---------------------------------------|------|---------|-----------|-------------|--------|
| There are currently no chat requests. |      |         |           |             |        |

**General Chat Requests From Public Users**

| CREATED                               | TYPE | CHANNEL | REQUESTER | DESCRIPTION | ACTION |
|---------------------------------------|------|---------|-----------|-------------|--------|
| There are currently no chat requests. |      |         |           |             |        |

**Personal Chat Requests For You**

| CREATED                               | TYPE | CHANNEL | REQUESTER | DESCRIPTION | ACTION |
|---------------------------------------|------|---------|-----------|-------------|--------|
| There are currently no chat requests. |      |         |           |             |        |

**My Active Chats**

8.1: 8.1.1

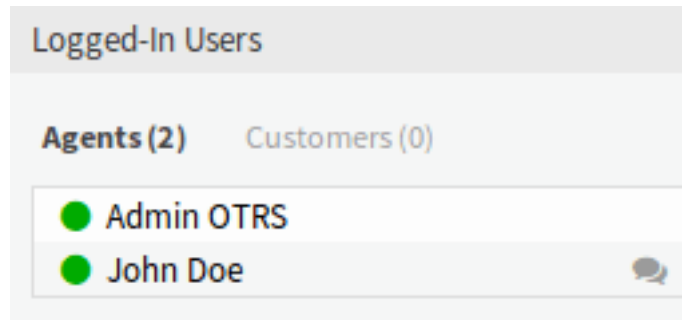
**8.1.1**

8.1.1.1

8.1.1.2

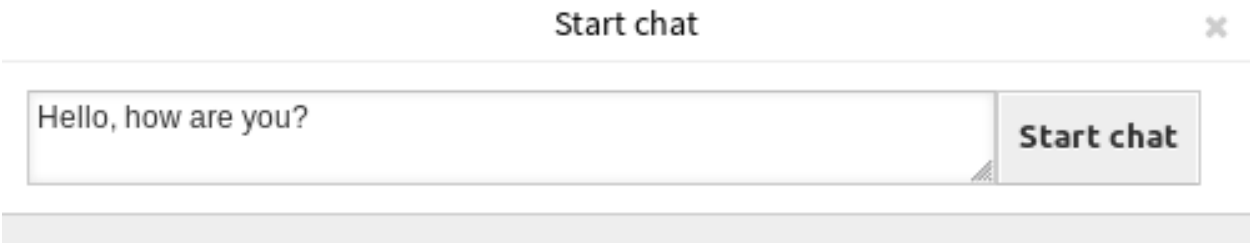
8.1.1.3

1. 8.1.1.3.1

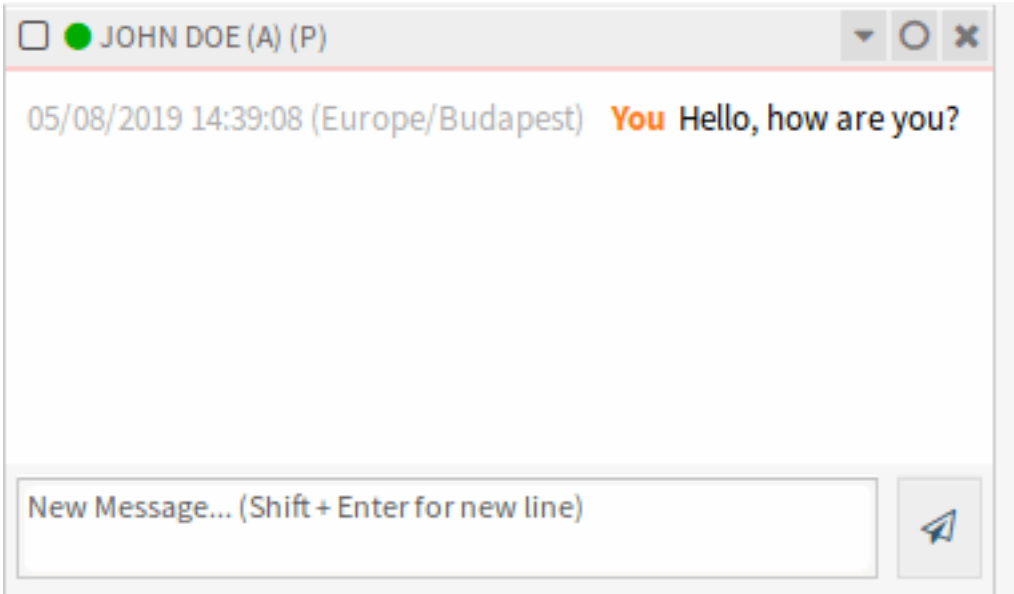


8.2: 8.2.1

2. 8.2.1.1
3. 8.2.1.2
4. 8.2.1.3
5. 8.2.1.4
6. 8.2.1.5



8.3: Start chat dialog

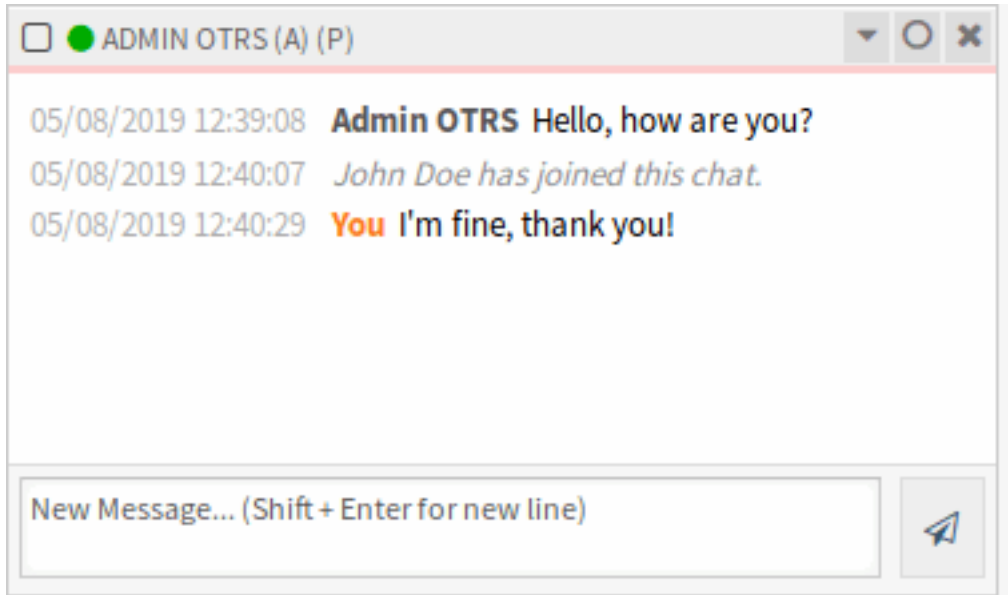


8.4: Chat window screenshot

Personal Chat Requests For You

| CREATED             | TYPE | CHANNEL         | REQUESTER  | DESCRIPTION         | ACTION    |
|---------------------|------|-----------------|------------|---------------------|-----------|
| 05/08/2019 12:21:22 | User | Default channel | Admin OTRS | Hello, how are you? | Open chat |

8.5: Personal Chat Requests For You table

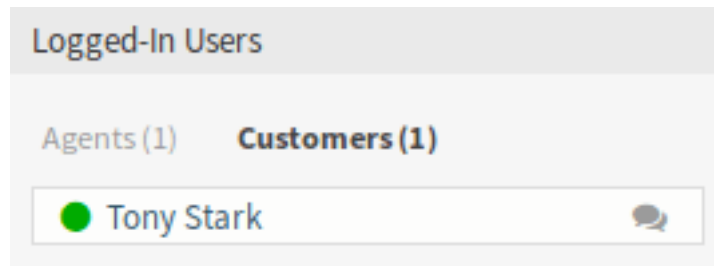


8.6: Chat window

Chat window

Chat window

1. Chat window

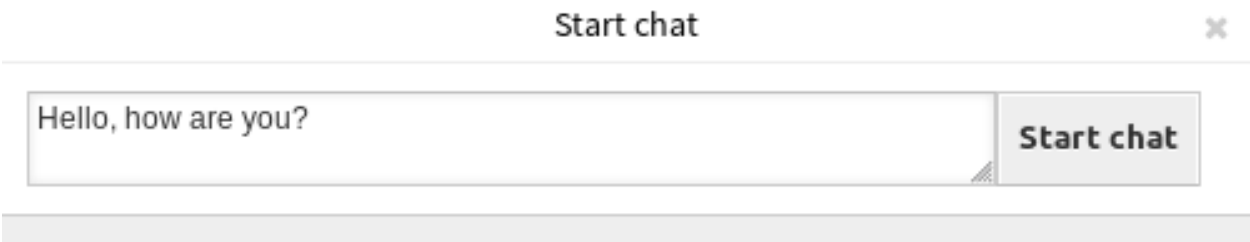


8.7: Logged-In Users

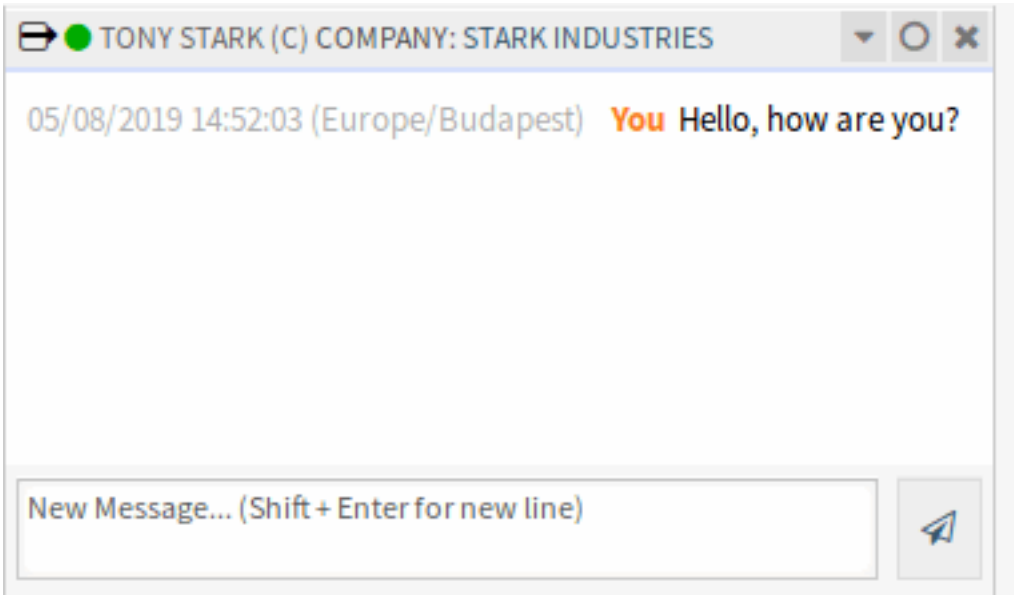
8.7:

Logged-In Users

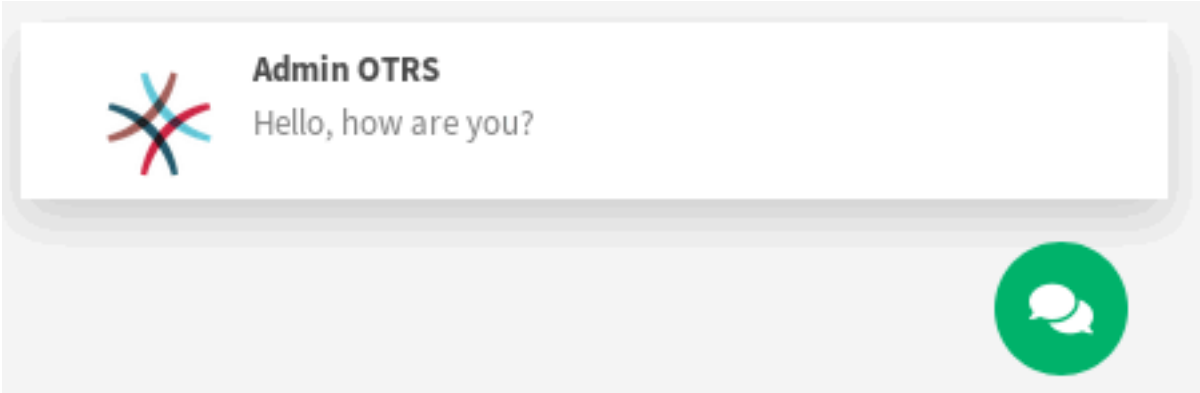
2. Logged-In Users
3. Logged-In Users
4. Logged-In Users
5. Logged-In Users
6. Logged-In Users
7. Logged-In Users



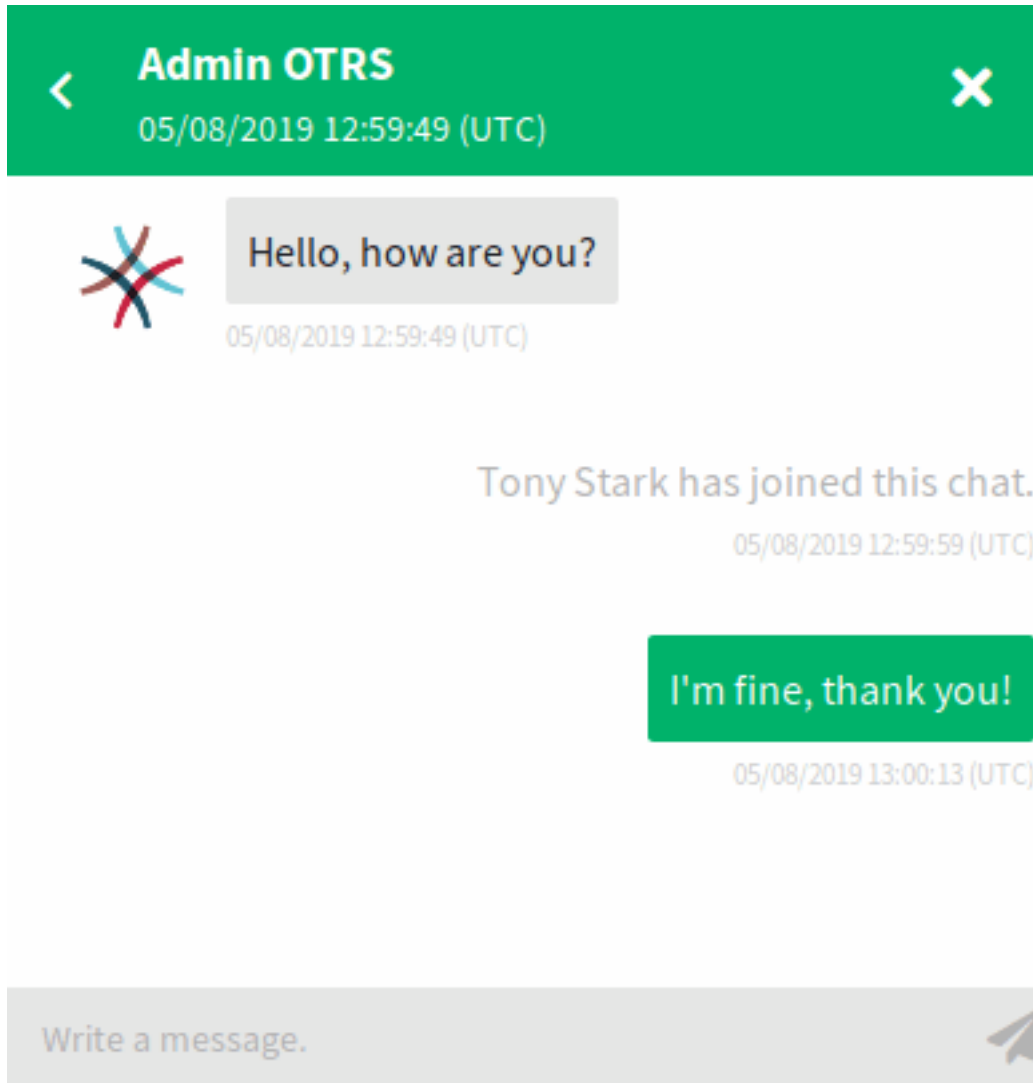
8.8: Start chat dialog



8.9: Chat window



8.10: Chat notification bubble



8.11: Chat interface





Figure 8.13

Figure 8.13: Chat Conversation

Figure 8.13: Chat Conversation

1. Figure 8.13: Chat Conversation

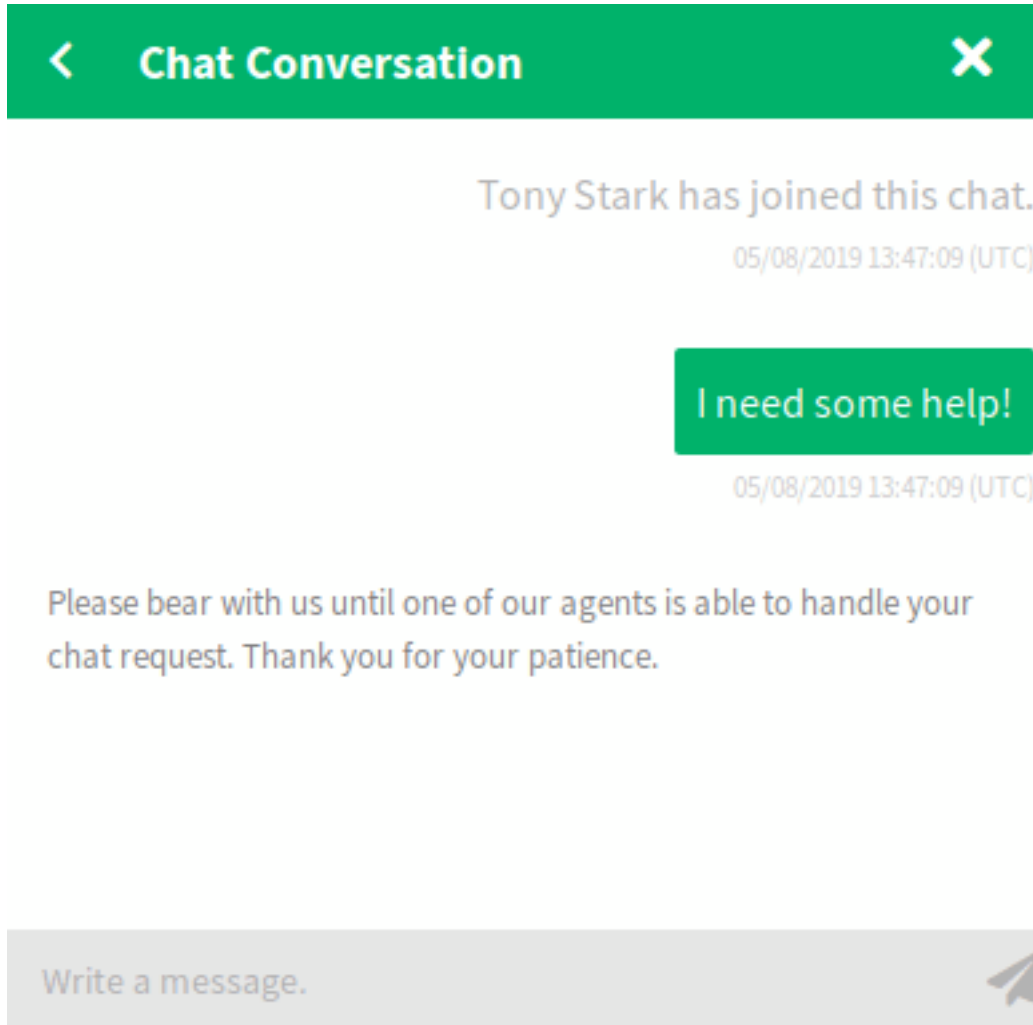


Figure 8.13: Chat Conversation

2. Figure 8.13: Chat Conversation
3. Figure 8.13: Chat Conversation
6. Figure 8.13: Chat Conversation

Figure 8.13

Figure 8.13: Chat Conversation

Figure 8.13: Chat Conversation General chat Requests From Public Users

General Chat Requests From Customers

| My Chat Channels                      |          | All Chat Channels |            |                   |           |  |
|---------------------------------------|----------|-------------------|------------|-------------------|-----------|--|
| CREATED                               | TYPE     | CHANNEL           | REQUESTER  | DESCRIPTION       | ACTION    |  |
| 05/08/2019 15:47:09 (Europe/Budapest) | Customer | Helpdesk          | Tony Stark | I need some help! | Open chat |  |

8.14: [Redacted]

Chat preview



Chat protocol

[05/08/2019 15:47:09 (Europe/Budapest)] Tony Stark has joined this chat.  
[05/08/2019 15:47:09 (Europe/Budapest)] Tony Stark I need some help!

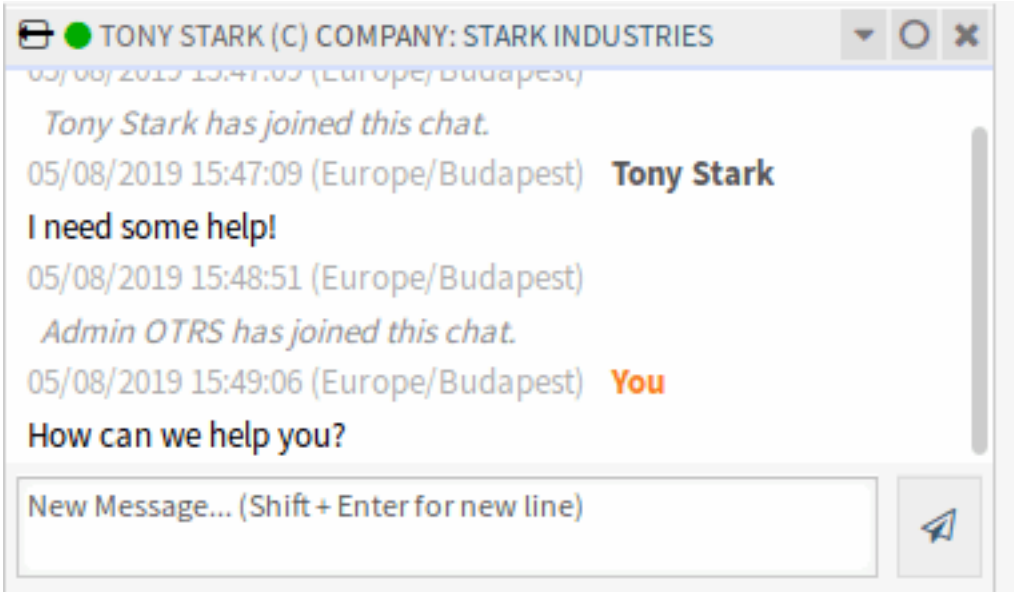
Change chat channel

Current chat channel: Helpdesk

Available channels: [Dropdown menu] [Refresh icon]

[Update Channel] [Accept] [Cancel]

8.15: [Redacted]



8.16: [Redacted]

< Chat Conversation X

Jane Smith has joined this chat.


05/08/2019 14:00:27 (UTC)

Can you tell me some details about the service?

05/08/2019 14:00:27 (UTC)

Please bear with us until one of our agents is able to handle your chat request. Thank you for your patience.

Write a message. 

8.17: 

General Chat Requests From Public Users

| CREATED                                  | TYPE   | CHANNEL  | REQUESTER  | DESCRIPTION                                     | ACTION    |
|------------------------------------------|--------|----------|------------|-------------------------------------------------|-----------|
| 05/08/2019 16:00:27<br>(Europe/Budapest) | Public | Helpdesk | Jane Smith | Can you tell me some details about the service? | Open chat |

8.18: 

8.1.2 Chat widget

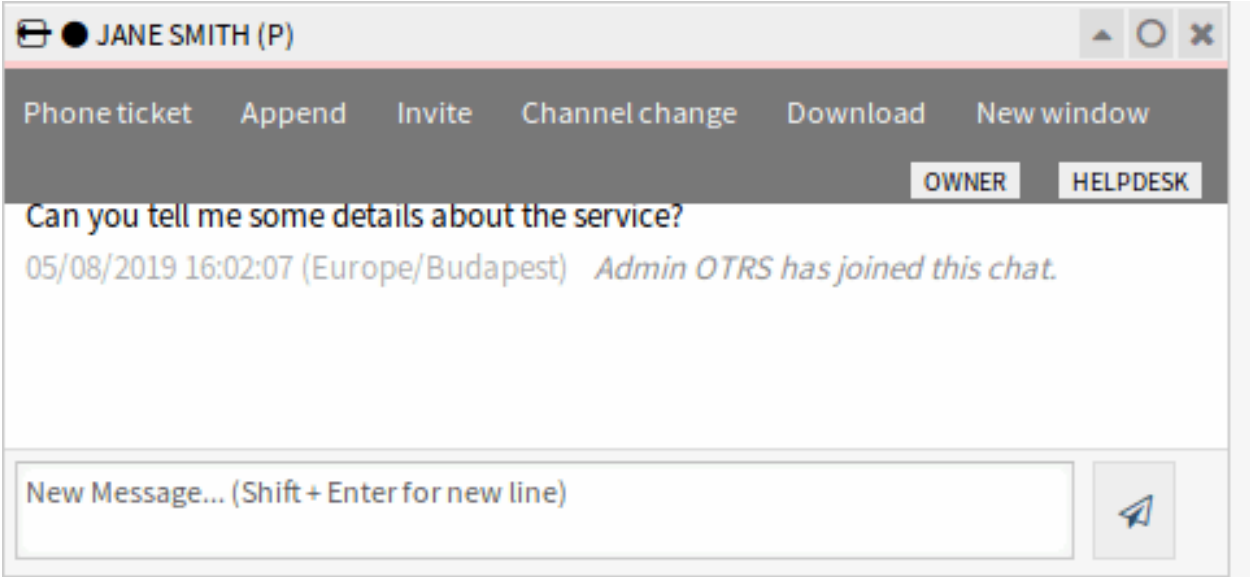
The chat widget is the main component when chatting with other people. It provides a history of all messages in the chat as well as a list of possible actions depending on your permission level.

Pressing Shift + Enter will create a new line in the chat.

The chat widget supports the following actions:

- Send a message (press Enter)
- Send a message (press ChatEngine::AgentOnlineThreshold)
- Send a message (press Shift + Enter)
- Send a message (press Ctrl + Enter)
- Send a message (press Alt + Enter)

The chat widget also supports the following actions:



8.19: Chat widget

The chat widget also supports the following actions:

Pressing the Invite button will open a dialog to invite another agent.

Pressing the Channel change button will open a dialog to change the chat channel.

Allows you to invite another agent to this chat. You can select from a list of available agents whom you want to invite. Once the agent has invited, a new agent to agent chat request will be sent to this agent. After the request has been accepted, a new internal chat will be established between you and the invited agent. In this internal chat, the invited agent has two more actions available in the advanced actions toolbar: Observer and Participant.

Pressing the Download button will download the chat history.

Pressing the PDF button will generate a PDF report of the chat history.

Pressing the Append button will append the chat history to the current chat.

Pressing the Phone ticket button will create a new phone ticket from the chat history.



Chat Integration ✕

You can easily integrate the public chat into a website. Just copy the code snippets from here. If you would like to make any adaptations, please switch to the configuration tab. All changes are applied immediately to the snippet, so you can make your changes and copy the snippet to your clip board afterwards. Please note that changes made on this page are not remembered.

Configuration **Integration Code** Preview

**Integration Code**


Integrate this into the bottom of your page:

```
<script type="text/javascript" src="http://yourhost.example.com/dist/chatintegration/main.js"></script>
```

Close this dialog

8.21: 0000 - 0000

Chat Integration ✕



It looks like no one is available at the moment. Please try again later.

⋮

Close this dialog

8.22: 0000 - 00







Add Report

★ Name:

★ Description:

★ Valid:

or

Figure 9.2: Add Report

2. Add Report
3. Add Report

9.1.1 Add Report

1. Add Report
2. Add Report

9.1.2 Add Report

1. Add Report
2. Add Report

9.1.2 Add Report

Each resource can be used in OTOBO only, if this field is set to valid.

\* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid.

Setting this field to invalid or invalid-temporarily will disable the use of the resource.

\* Set the validity of this resource. Each resource can be used in OTOBO only, if this field is set to valid. Setting this field to invalid or invalid-temporarily will disable the use of the resource.

9.1.3 Add Report

Each resource can be used in OTOBO only, if this field is set to valid.

Set the validity of this resource.

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Each resource can be used in OTOBO only, if this field is set to valid.

Setting this field to invalid or invalid-temporarily will disable the use of the resource.

Each resource can be used in OTOBO only, if this field is set to valid.

## Settings

**General settings**★ Name: ★ Description: ★ Valid: **Automatic generation settings**Automatic generation times (cron): 

Specify when the report should be automatically generated in cron format, e. g. "10 1 \* \* \*" for every day at 1:10 am.

Times are in the system timezone.

Automatic generation language: 

The language to be used when the report is automatically generated.

Email subject: 

Specify the subject for the automatically generated email.

Email body: 

Specify the text for the automatically generated email.

Email recipients: 

Specify recipient email addresses (comma separated).

**Output settings**Headline: Title: Caption for preamble: Preamble: Caption for epilogue: Epilogue: Add statistic to report:



Statistics Management

Actions

- Add Statistics
- Import Statistics

Statistics

| STAT# | TITLE                                                                       | OBJECT             | EXPORT | DELETE | RUN |
|-------|-----------------------------------------------------------------------------|--------------------|--------|--------|-----|
| 10001 | Changes of status in a monthly overview                                     | StateAction        |        |        |     |
| 10002 | List of tickets closed last month                                           | Ticketlist         |        |        |     |
| 10003 | List of open tickets, sorted by time left until response deadline expires   | Ticketlist         |        |        |     |
| 10004 | New Tickets                                                                 | TicketAccumulation |        |        |     |
| 10005 | List of open tickets, sorted by time left until solution deadline expires   | Ticketlist         |        |        |     |
| 10006 | List of tickets closed, sorted by response time.                            | Ticketlist         |        |        |     |
| 10007 | List of open tickets, sorted by time left until escalation deadline expires | Ticketlist         |        |        |     |
| 10008 | Overview about all tickets in the system                                    | TicketAccumulation |        |        |     |
| 10009 | List of tickets created last month                                          | Ticketlist         |        |        |     |
| 10010 | List of tickets closed, sorted by solution time                             | Ticketlist         |        |        |     |
| 10011 | List of the most time-consuming tickets                                     | Ticketlist         |        |        |     |

1-11 of 11

9.5: Statistics

Add Statistics

**Dynamic Matrix**  
Each cell contains a singular dat...

**Dynamic List**  
Each row contains data of one e...

**Static**  
Non-configurable complex statis...

9.6: Add Statistics

3. 00000000
4. 00 00 000

**General Specification**

**\* Title:**

**\* Description:**

**\* Object type:**

**\* Permissions:**   
You can select one or more groups to define access for different agents.

**\* Result formats:**

**\* Time Zone:**   
The selected time periods in the statistic are time zone neutral.

**Create summation row:**   
Generate an additional row containing sums for all data rows.

**Create summation column:**   
Generate an additional column containing sums for all data columns.

**Validity:**   
If set to invalid end users can not generate the stat.

9.7: 00000000

To edit statistics:

1. 0000000000000000
2. 00000000000000
3. 00 00 0 00000 000

To import statistics:

1. 0000000 0000 000
2. 00 00 ... 00000000000000 .xml 000
3. 00 00 000
4. 00000000000000
5. 00 00 0 00000 000

To export statistics:

1. Click on the download icon in the list of statistics.
2. 0000000000000000 ` .xml 000

To delete statistics:

1. 00000000000000

▼ General Specification

\* Title:

\* Description:

\* Permissions:   
You can select one or more groups to define access for different agents.

\* Result formats:

\* Time Zone:   
The selected time periods in the statistic are time zone neutral.

Create summation row:   
Generate an additional row containing sums for all data rows.

Create summation column:   
Generate an additional column containing sums for all data columns.

Cache results:   
Stores statistics result data in a cache to be used in subsequent views with the same configuration (requires at least one selected time field).

Show as dashboard widget:   
Provide the statistic as a widget that agents can activate in their dashboard. Please note that enabling the dashboard widget will activate caching for this statistic in the dashboard.

Validity:   
If set to invalid end users can not generate the stat.

9.8: Screenshot

Import Statistics Configuration

File:  Keine Datei ausgewählt.

or

9.9: Screenshot

2. 統計を実行する

To run statistics:

1. Click on the play icon in the list of statistics.
2. 統計を実行する
3. 統計を実行する

**Settings**

**Object:** TicketAccumulation

**Description:** Total number of new tickets per day and queue which have been created during the last month.

**Format:**

**Time Zone:**

The selected time periods in the statistic are time zone neutral.

---

**X-axis**

**Create Time:** The past complete 1 and the current+upcoming complete 0 month(s)  
Scale: 1 day(s)

**Y-axis**

---

**Queue:** Junk, Misc, Postmaster, Raw

**Filter**

No element selected.

▶ Run now or Cancel

9.10: 統計を実行する

To preview statistics:

1. 統計を実行する
2. 統計を実行する
3. 統計を実行する
4. 統計を実行する X軸/Y軸 の 統計を実行する

統計: 統計を実行する

## 9.2.2 統計を実行する

統計を実行する

統計 \* 統計を実行する

統計 統計を実行する





9.11: 9.11.1 9.11.2



FirstResponseTimeWorkingTime

FirstResponseTimeEscalation

FirstResponseTimeNotification

FirstResponseTimeDestinationTime

FirstResponseTimeDestinationDate

FirstResponseTime

UpdateTimeNotification

UpdateTimeDestinationTime

UpdateTimeDestinationDate

UpdateTimeWorkingTime

UpdateTime

SolutionTime

SolutionTimeWorkingTime

SolutionTimeEscalation

SolutionTimeNotification

SolutionTimeDestinationTime

SolutionTimeDestinationDate

SolutionTime

StateType

UntilTime

UnlockTimeout

EscalationResponseTime

EscalationSolutionTime

EscalationUpdateTime

RealTillTimeNotUsed

DynamicField\_NameX

DynamicField\_NameY

DynamicField\_NameZ

DynamicField\_NameW

DynamicField\_NameV

DynamicField\_NameU

DynamicField\_NameT

DynamicField\_NameS

DynamicField\_NameR

DynamicField\_NameQ

DynamicField\_NameP









**Search Results:**

Change search options (last-search) 1-2 of 2 **S** M L

| <input type="checkbox"/> |   | TICKET#          | ▼ AGE   | SENDER      | TITLE                  | STATE | LOCK   | QUEUE | OWNER       | CUSTOMER ID |
|--------------------------|---|------------------|---------|-------------|------------------------|-------|--------|-------|-------------|-------------|
| <input type="checkbox"/> | ★ | 2020120449000029 | 7 d 3 h | Wyle Coyote | Computer makes noise   | open  | unlock | Raw   | Super Admin | acme.co     |
| <input type="checkbox"/> | ★ | 2020120449000011 | 7 d 7 h | Wyle Coyote | Computer doesn't start | open  | lock   | Raw   | Super Admin | acme.co     |

## 11.2: 11.2.1

### 11.2.1

1. 11.2.1.1
2. 11.2.1.2

11.2.1.1

### 11.1.1

11.1.1.1

If the query string is a single word (for example `quick` or `brown`), then OTOBO searches for all items containing the given word.

If two or more words are given in the query string (for example `quick brown`), then OTOBO searches for all items containing the word `quick` **or** `brown`.

If the query string contains a phrase surrounded by double quotes (for example `"quick brown"`), then OTOBO searches for all items containing the words in the phrase in the same order.

11.1.1.2

---

11.1.1.3

---

11.1.1.4

11.1.1.5

11.1.1.6

11.1.1.7

11.1.1.8

11.1.1.9

A query string like `"quick fox"` searches the words in exactly the same order, but the proximity search allows that some other words can be included between the given words (for example `"fox quick"~5`).

11.1.1.10

11.1.1.11

11.1.1.12

11.1.1.13



quick brown fox

+ -

quick brown +fox -news

- fox
- news
- quick brown

AND OR NOT ` ` & | | ! ((quick AND fox) OR (brown AND fox) OR fox) AND NOT news

(quick OR brown) AND fox

+ - = && | | > < ! ( ) { } [ ] ^ " ~ \* ? : \ /

(1+1)=2 \ (1\+1\) \=2

:

Elasticsearch



---

Documentation History

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1. 2019 - OTRS User Manual - OTRS AG (<https://otrs.com>)
2. 2020 - OTOBO User Tutorial - Rother OSS GmbH (<https://otobo.de>)

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