Freshdesk New User Guide:
Client User

Welcome to another great way for your organization to reach Support at JMT Consulting! From your JMT Consulting/Freshdesk, you can submit tickets, communicate with your assigned agent, keep track of your ticket status, and even keep a running log of your current and past tickets.

- If you have not yet submitted a ticket using the new portal, just email support@jmtconsulting.com as usual and a Freshdesk activation email will be sent to you. From that email, you can create your password.

- If you do not have a current support ticket to submit or previously submitted one before the portal was open, simply email smurphy@jmtconsulting.com to reach our our Client Success Manager, who will send you the activation email.

Opening Your Freshdesk Portal

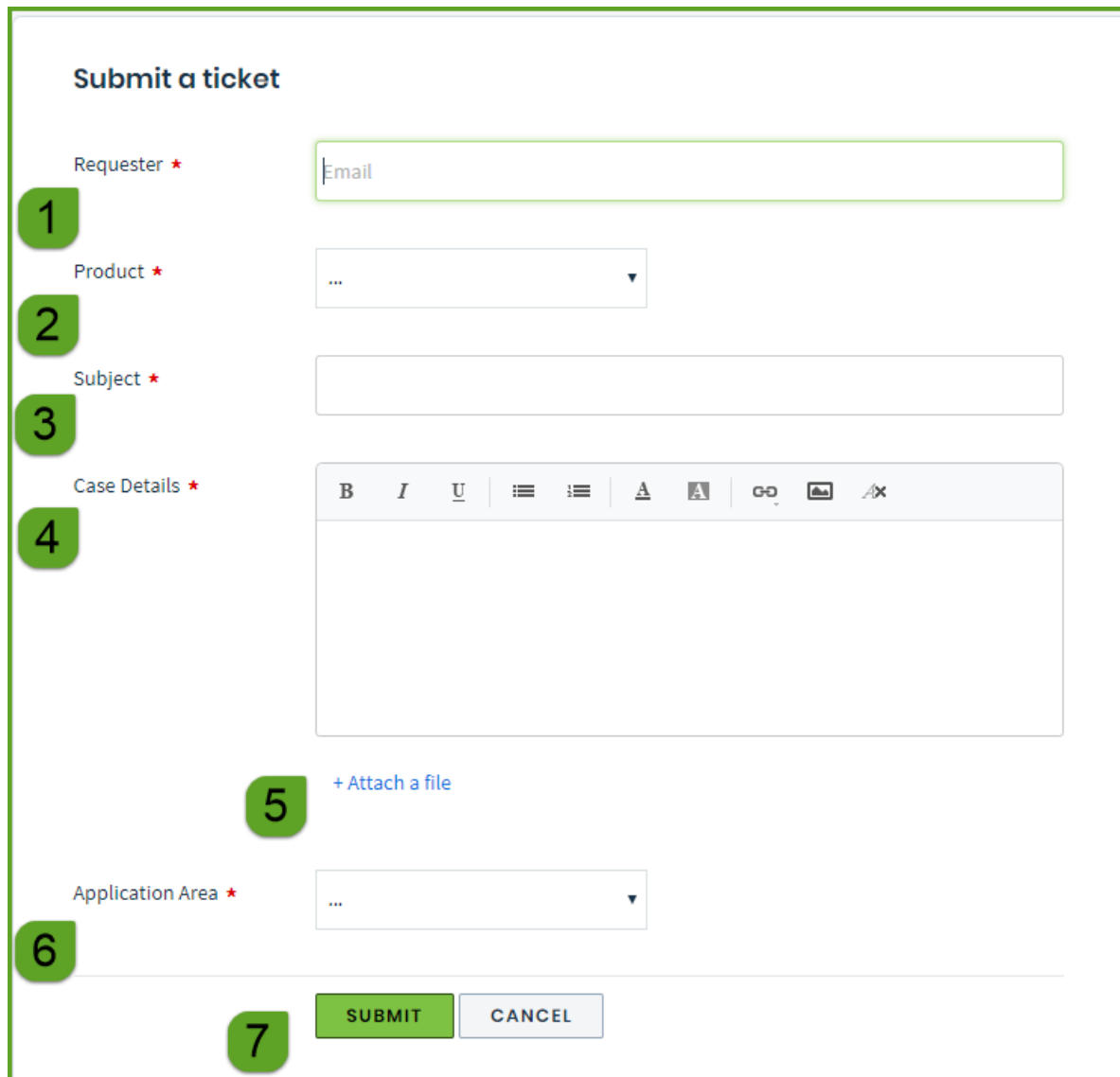Go to www.jmtconsulting.freshdesk.com/support/home.
Bookmark this page if you have not already, please.
This is your portal to entering and viewing submitted support tickets.
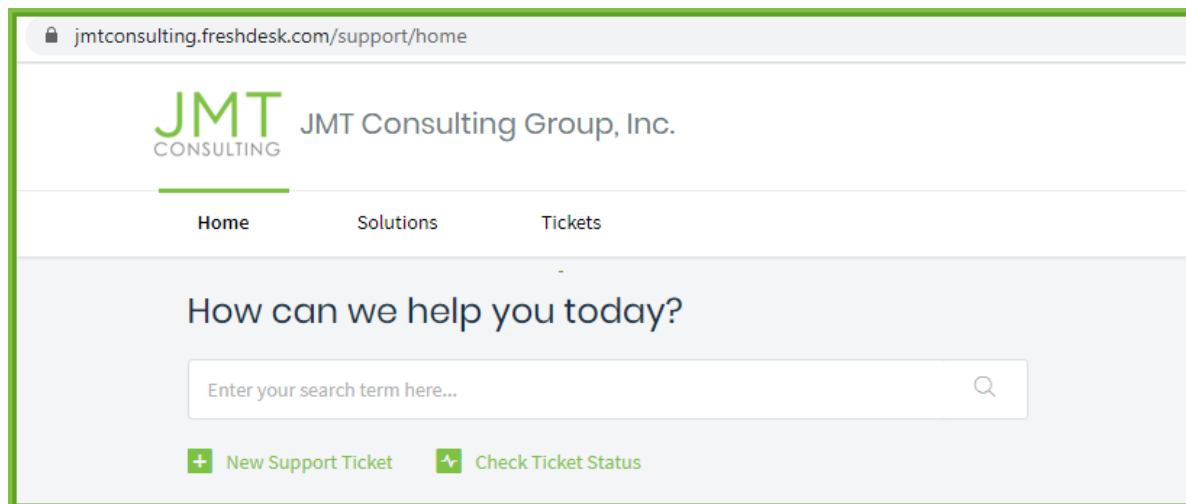
Submit a Ticket

Click the **New Support Ticket** 🔲 New Support Ticket link.
This opens **Submit a Ticket** screen.

Submit a ticket

|		
Requester *	Email	**1**
Product *	... ▼	**2**
Subject *		**3**
Case Details *	B *I* U ≡ ≡ A A ᴄᴏ 🖼 ✗	**4**
	+ Attach a file	**5**
Application Area *	... ▼	**6**
	SUBMIT CANCEL	**7**

	Name	Action
1	Requester	Email address of person submitting the ticket
2	Product	The software which requires assistance.
3	Subject	The more descriptive the title line you give the subject the easier it will be for you to refer to the ticket when you wish to find or view the ticket later.
4	Case Details	Describe the issue or question the best you are able to as this allows our support team to better understand your initial question or issue.
5	Attach a file	Attach any screenshots or documentation you feel would be important to support your question or issue for the ticket.
6	Application Area	Select the module or area of the software you are experiencing the issue or addressing the question.
7	Submit	Click the Submit button and your ticket is automatically on its way to a support team member.

Viewing Your Submitted Tickets

You can easily view the status of your submitted ticket.

Click the **Check Ticket Status** [Check Ticket Status] link.
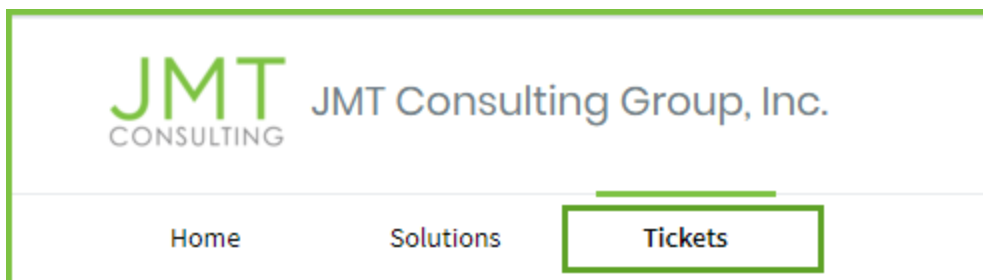The **Tickets List** page opens.
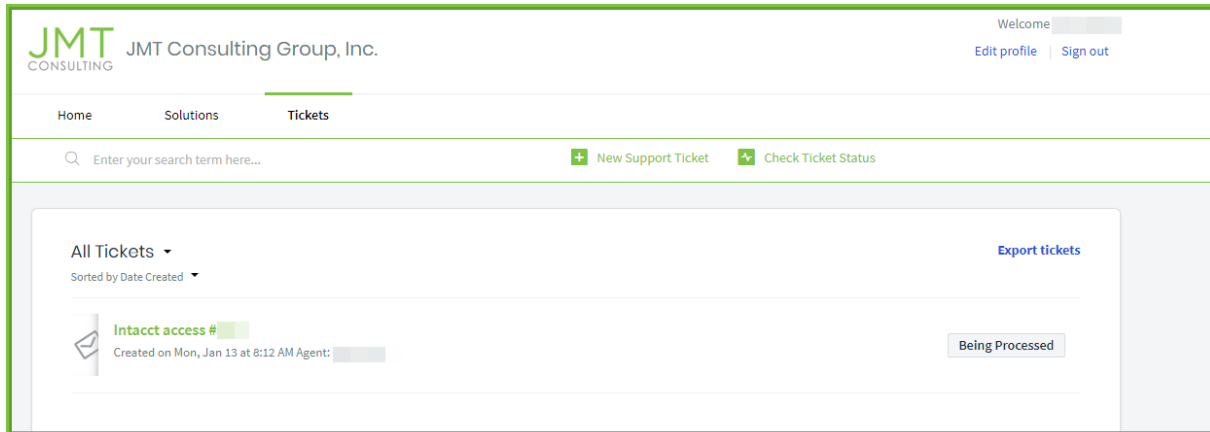
The ticket's subject, ticket #, date created, assigned agent, and the status.

In this example, the status of the ticket is **Being Processed**.

-OR-

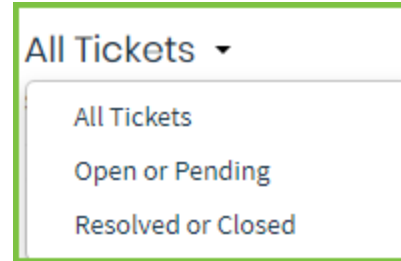*Click* on the **Tickets** link on the **Menu** bar.

Ticket Viewing Options

You can choose how you wish to view or filter your tickets.

Sort By Status:

Click the **All Tickets** link.
You can choose to see All Tickets, Open or Pending, or Resolved or Closed.

All Tickets ▾

All Tickets
Open or Pending
Resolved or Closed

Sort By Ticket Properties:

You can sort your tickets by when the Date Created, Last Modified, Priority, and the Status. Then, you can select which order of those sorted tickets you would like in Ascending or Descending order.

All Tickets ▾
Sorted by Date Created ▾

Date Created
Last Modified
Priority
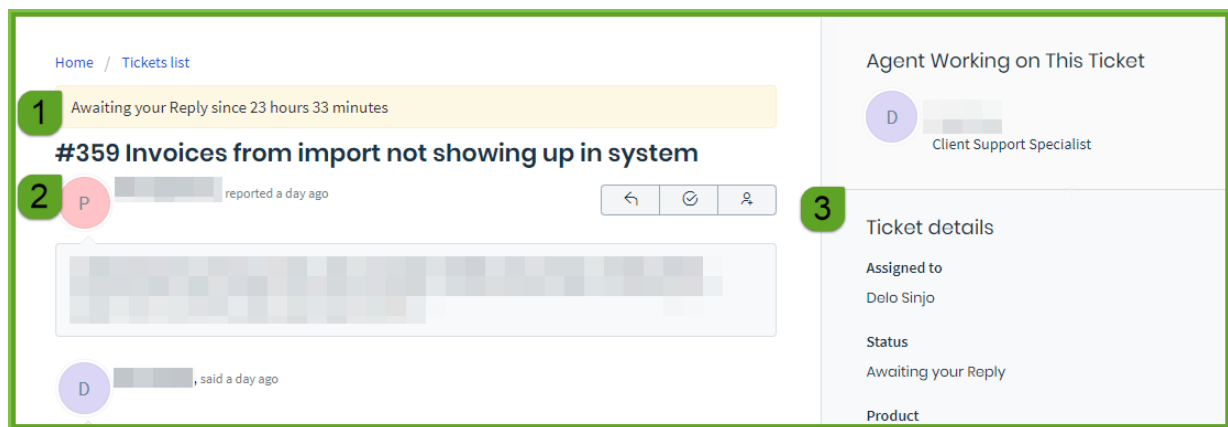Status

Ascending
Descending
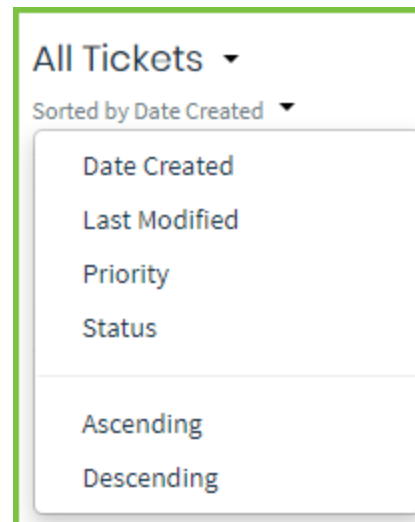
Viewing a Ticket

When you select the link for the ticket, your ticket will open. At the top of the ticket, you will see the status again, as well as how much time has it been in its current state. You will see the ticket number as well as the support agent assigned to your ticket.

You will now be able to view all the communications with your support agent or consultant and ticket information.

Let's take a look at the parts of your ticket.

|	The Parts of Your Ticket
1	A highlighted bar shows the status of your ticket. This also shows how long it has been in this state. In this sample ticket, the user is able to see that the support agent is waiting for a reply. It is always nice to know who's turn in a game, right?
2	The communications between the support agent and the user are all in one convenient spot.
3	Ticket details. Please let us know if any of this information is incorrect.
4	Your ticket options. * See further information below.

Ticket Next Step Options

At the top of your ticket, you have several **Next Step Shortcuts** which appear in the last communication with support. You can Reply, Close the Ticket, or Add Another User into the conversation.

Reply

Click **Reply** to support. All correspondence between support and you are in one spot. No need to dig for emails.

*Note: You can also reply at the bottom of the email thread wherever you see this textbox.

Click here to reply to this ticket
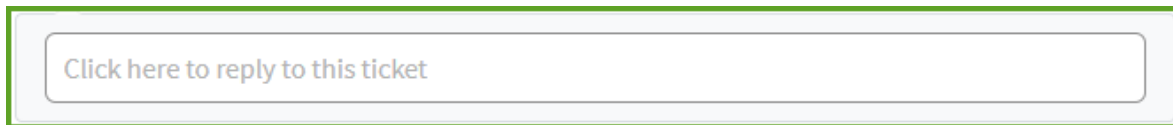
Close Ticket

What if you found the answer to your question right after you submitted a ticket? It happens.

You can now self-close by using the **Close** button at the top of your ticket. Or, maybe after talking to support the issue has been resolved, you may choose to close the ticket yourself.

Add People to Ticket Conversation

What if another person in the office using Freshdesk needs to be brought into the conversation?

Click the **Add to Conversation** button.

A popup box will appear where you can type in the email of a fellow Freshdesk user in your organization to be included in this ticket's conversation.
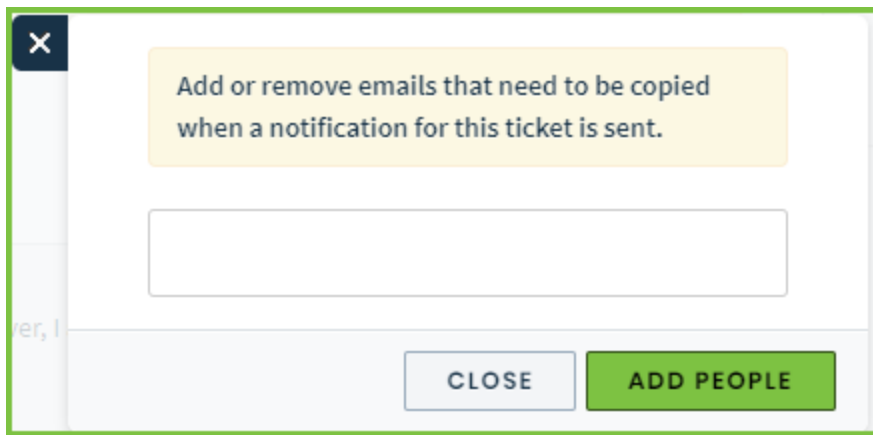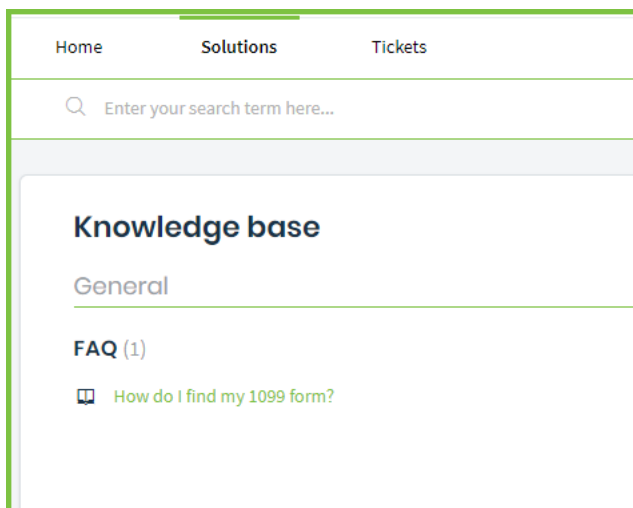

Coming Soon!

Solutions Self-Service

You think you have a quick question... Wouldn't it be as nice to search for answers for your software just like you would on searching for everything else online?

Welcome to the JMT Consulting Support Knowledge Base! EVP members will have access to How to articles, FAQs, and articles written to help you.
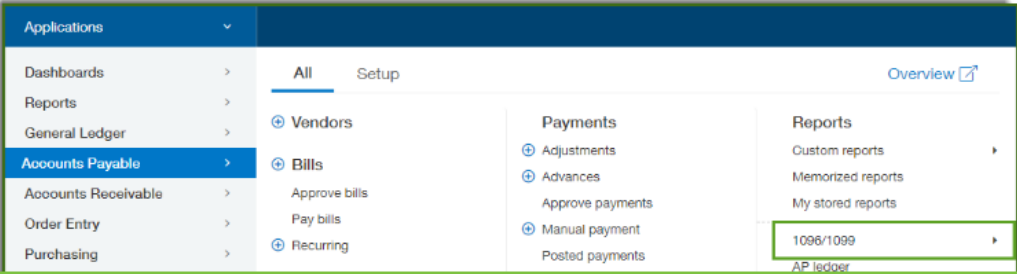
Below is a sample FAQ that addresses 1099 forms for Sage Intacct users.

How do I find my 1099 form?

To find your 1099 form:

1. Go to **Accounts Payable**
2. To the left side of the Accounts Payable window, you will see the link **1096/1099**
3. *Click* the link
4. You will see the 1096 form.

If you cannot find your answer, Support is only one click away. No, literally...just one click on the **New Support Ticket** link in your Freshdesk portal. It will be our pleasure to help!

End of Guide