NOMAD SMALL BUSINESS SUITE

Nomad Support Desk Free - Detailed User Guide

A role-by-role operating manual covering ticket creation, customer communication, mobile technician work, time capture, customer sign-off, analytics, billing, inbound email and embedded Ticket AI in Service Desk Free.

Edition: 0.2.3
Audience: Customers, technicians/resources, support managers and administrators

Contents

This guide is based on the verified product package and is written as an operational reference. Use the online version for navigation and this PDF for offline access.

1. How Service Desk Free works

Learn the shared ticket lifecycle and the screens used by each role.

The ticket lifecycle

A ticket normally starts as Open, moves through Pending or Waiting on Customer, becomes Resolved when work is complete and is Closed after final confirmation or sign-off. Staff should use statuses consistently so customer views, filters, analytics and CRM tags remain meaningful.

Status	Use it when
Open	The request is new or has returned to the active queue
Pending	Support work is in progress or scheduled
Waiting on Customer	A customer response, access or decision is required
Resolved	A solution has been delivered and is awaiting final closure
Closed	The ticket is complete and no further action is expected

Who uses which screen

Role	Primary screen	Main tasks
Customer	Support Desk portal	Create, reply, review status, analytics and sign-off
Technician/resource	Support Agent Desk	Work assigned tickets, update, reply, add notes and log time
Support manager	WordPress Support Desk menu	Triage, assignment, customers, resources, analytics and billing
Administrator	Support Desk Settings and AI Settings	Configuration, access, integrations and governance

Ticket fields

- Ticket number and subject
- Description
- Customer
- Status and priority
- Product/service and website URL when present
- Assigned WordPress user, primary resource and additional resources
- Replies and internal notes
- Time entries
- Customer signatures

Before you begin

Service Desk is a shared operational record. A customer sees the tickets linked to the customer's verified email record; an active resource sees work assigned to that resource; support managers use the WordPress administration screens to manage the full queue. Always sign in with your own named account so access, replies, time and sign-off activity can be attributed correctly.

The ticket timeline is the authoritative history. Email notices and dashboard totals help users find work, but they do not replace the saved ticket. After any important action, wait for the success message and confirm the new entry appears in the timeline before closing the page.

Ticket anatomy

Area	What it tells you	User action
Header	Ticket number, subject, status and priority	Confirm you opened the intended request
Customer and context	Customer, product/service and website	Check that the affected service is clear
Assignment	Support owner, primary resource and additional resources	Use it to identify responsibility
Conversation	Public replies, internal notes and lifecycle events	Read in time order before adding an update
Time	Work entries, minutes, rate context and billable choice	Record completed effort accurately
Signatures	Customer/job-card approval records	Confirm completion evidence belongs to this ticket

Lifecycle decision guide

- Leave a genuinely new or newly reactivated request Open
- Use Pending while support owns an active or scheduled next action
- Use Waiting on Customer only after stating exactly what the customer must provide
- Use Resolved after supplying the solution or completing the work
- Use Closed after the completion record, approval or final confirmation is complete
- Add a timeline note whenever a status change would otherwise be unclear

Consistency	Status affects queues, customer analytics and optional CRM tags. It should describe ownership of the next action, not merely the age of the ticket.

2. Customer portal

Use the logged-in portal to create and follow support work.

Open the portal

1. Sign in with the WordPress account whose email belongs to the customer record.
2. Open the site's Support Desk page.
3. Confirm the customer name and ticket summary belong to the correct account.
4. Use the New Ticket area or open an existing ticket.

Create a useful ticket

1. Enter a short subject that identifies the problem.
2. Choose the appropriate priority; use Urgent only for genuinely critical impact.
3. Select or describe the product/service when available.
4. Enter the relevant website URL when useful.
5. Describe what you expected, what happened, when it started and what changed.
6. Remove passwords, private keys and payment information.
7. Submit once and note the ticket number.

Description checklist

- Exact error wording
- Affected page or feature
- Device/browser when relevant
- Steps that reproduce the problem
- Business impact
- Recent plugin, theme, hosting or configuration changes
- What has already been tried

Reply and follow progress

Open the ticket from the portal, read public replies in order and add one clear response. If the ticket is Waiting on Customer, answer the requested question before asking for another update. Status-change entries help explain lifecycle movement.

Privacy	Never paste a live password, full licence key, private API key or card information into a reply.

Sign-in and customer matching

Portal access is based on the email address of the signed-in WordPress account and the Service Desk customer record. If the account email is the primary or an authorised additional address, the portal can show that customer's tickets. Approved company-domain matching may also be used by the site's configuration. A customer who changes email address should ask support to update the Service Desk customer record before assuming historical tickets are lost.

1. Open the website's normal sign-in page and authenticate with your own account.
2. Open Support Desk and check the displayed customer or ticket information.
3. If the organisation is wrong, sign out immediately and report the access problem without opening ticket details.
4. If no customer is found, give support the signed-in email address and organisation name; do not create duplicate accounts repeatedly.

Create, confirm and correct a request

Submitting the form creates one numbered ticket. The confirmation and ticket list should show the new number. If the browser appears slow, do not press Submit repeatedly; wait, then refresh the ticket list once. Duplicate submissions create separate operational records and should be reported so staff can close or remove the confirmed duplicate.

1. Re-read the subject and description, confirming they describe one main issue.
2. Check the selected priority against the actual impact.
3. Submit once and record the displayed ticket number.
4. Open the new ticket and confirm the complete description is present.
5. Add a public reply to correct missing facts; do not create another ticket merely to correct wording.

Write a diagnostic description

Question	Good information	Why it helps
Where?	Page address, product or service	Directs the investigation
What?	Exact visible result or error wording	Separates similar failures
Expected?	What should normally happen	Defines success
When?	First occurrence and whether intermittent	Supports log correlation
Who/impact?	Affected users or business task	Supports priority
Change?	Recent update, setting or environment change	Narrows likely causes
Tried?	Safe checks already completed and their results	Prevents repetition

3. Ask Support AI before opening a ticket

Use embedded assistance to find likely causes and prepare a better request.

Run a pre-ticket query

1. Choose Provided resource files, Resource files + internet or Internet only, if those options are enabled.
2. Describe the issue with symptoms and context but without secrets.
3. Select Ask Support AI.
4. Read the issue assessment, likely causes, diagnostics, possible resolution, draft reply and uncertainties.
5. Open the Sources list and verify relevant evidence.
6. Use Copy suggestions or Use in ticket description when useful.
7. Edit the inserted text so it accurately describes your situation before submitting.

What AI can and cannot do

The assistant can search approved Service Desk resources and, when enabled, current public web sources. It can suggest diagnostics and draft communication. It does not confirm that a repair worked, access private systems on its own or replace technician judgement.

- Verify version-specific instructions
- Back up before risky changes
- Do not run destructive commands merely because they were suggested
- Escalate when evidence is incomplete

Choose the right research mode

Mode	Best use	Watch for
Provided resource files	Approved manuals and organisation knowledge	Material may apply only to a named version
Resource files + internet	Combine internal instructions with current public information	Web claims still require verification
Internet only	Current public product or platform research	Do not include confidential details

Read an AI result

Start with the issue assessment and uncertainties, then examine the proposed diagnostics in order. Open the source list and check that a cited resource actually concerns the product and version in the ticket. A confident writing style is not proof. If sources conflict, preserve the uncertainty in the ticket and ask a technician to decide which instruction applies.

Using the result in the ticket description copies text into the form; it does not submit the request or perform a change. Remove generic material, retain only facts you observed, and clearly label any suggested cause that has not been tested.

Safe next-action checklist

- Prefer observation and reversible diagnostics before configuration changes
- Confirm that a command or setting is for the installed version

- Obtain an appropriate backup before changes that affect data or availability
- Do not paste an API key, password, access token or full licence key into the query
- Stop when an answer requires access or authority you do not have
- Record the actual outcome rather than saying a suggestion was successful without testing

4. Technician/resource mobile portal

Work assigned tickets efficiently on a phone, tablet or desktop.

Find assigned work

1. Sign in with the WordPress user linked to your active resource record.
2. Open Support Agent Desk.
3. Use search for ticket number, customer or subject.
4. Filter by status and priority.
5. Choose the sort order and use pagination when required.
6. Open the ticket card or ticket detail.

Mobile controls

- Touch-friendly ticket cards
- Quick status controls
- Sticky save actions on small screens
- Preset time buttons
- Responsive time-entry tables
- Copy ticket/customer details
- Tap-to-call or contact actions when details are available
- Device-local draft retention for unsaved updates

Update a ticket

1. Review the issue, current status, priority and previous conversation.
2. Run Ticket AI if a knowledge or research check would help.
3. Change the status only when the lifecycle meaning changes.
4. Add a customer-visible reply or mark the entry as an internal note.
5. Log time with an accurate note and billable choice.
6. Save once and wait for confirmation before navigating away.

Internal notes

Use an internal note for technician reasoning, handover details or operational information that must not be shown to the customer. Do not use internal notes to store passwords or unrelated personal data.

Draft recovery

The mobile portal can keep update text in device-local storage. Returning to the same ticket on the same device/browser may restore the unsaved draft. A recovered draft is not a submitted reply; review and save it deliberately.

Shared devices	Clear drafts and sign out when using a shared phone or tablet.

Search, filter, sort and paginate

Search is most effective with an exact ticket number, a distinctive customer name or a short subject phrase. Status and priority filters reduce the list to an operating queue, while sort controls change the order. Pagination means an assigned ticket may be on another page; clear filters before reporting that it is missing.

1. Start with the exact ticket number when known.
2. Apply one status or priority filter at a time and inspect the result count.
3. Sort oldest-first when checking neglected work or newest-first for recent assignments.
4. Move through result pages before clearing the filter.
5. Reset search and filters to return to the complete assigned list.

Work a ticket from start to finish

1. Read the description, public conversation, internal notes and assignment before editing.
2. Confirm whether the customer, support team or another resource owns the next action.
3. Perform the approved diagnostic or work and keep evidence needed for the record.
4. Write a plain-language public reply when the customer needs an update; otherwise record a useful internal note.
5. Log the work duration, note, billable choice and resource accurately.
6. Choose the status that now describes the next action.
7. Save once, wait for confirmation and re-open the timeline entry to verify it.

Mobile and connectivity recovery

Situation	What to do
Save button remains busy	Wait; do not tap repeatedly. Check connectivity before refreshing
Page reloads with draft text	Review the locally restored draft and submit only if still current
No assigned ticket appears	Clear filters, verify assignment with a manager and confirm the linked resource account
Status changed but reply did not	Inspect the timeline before trying again; report the exact outcome
Shared device used	Clear drafts, sign out and close the browser session

5. Ticket AI for reviewers

Analyse the current ticket description and conversation from an authorised ticket screen.

Run analysis

1. Open the assigned or admin ticket.
2. Choose the research source mode.
3. Add a focused follow-up question if needed.
4. Select Analyse ticket.
5. Review cited sources and uncertainty statements.
6. Copy the analysis, insert the proposed customer reply or insert a work note.
7. Edit inserted content before saving.

Access and audit

Administrators and assigned active resources can use the ticket assistant for tickets they are permitted to review. Requests are rate-limited and analysis completion is recorded as a Service Desk event.

Customer identity	Prepared AI context excludes customer identity fields and stored licence-key fields, and common secrets are redacted. Staff must still avoid entering secrets in follow-up questions.

Build a focused analysis request

Ticket AI already receives the authorised ticket description and conversation, so the follow-up field should ask a precise question rather than repeat the whole ticket. Useful questions ask for a version-aware diagnostic sequence, differences between two likely causes, missing evidence, or a customer-safe explanation. Avoid asking it to assume that untested work succeeded.

- What evidence would distinguish the two most likely causes?
- Which diagnostic can be performed without changing production data?
- Does the cited instruction apply to the recorded product version?
- What customer question would remove the largest uncertainty?
- Draft a concise reply that separates confirmed facts from next checks

Insert, edit and save AI output

1. Choose Insert proposed reply only when the content is suitable for the customer.
2. Choose Insert work note for internal diagnostic reasoning or handover.
3. Remove claims not supported by the ticket or cited sources.
4. Replace generic steps with the approved action, owner and expected result.
5. Check that no sensitive value has appeared in copied text.
6. Save through the normal reply/update control and verify the timeline entry.

Responsibility	The named user who saves the reply or note remains responsible for its accuracy even when AI supplied the draft.

When not to use Ticket AI

- The request can be answered directly from a confirmed ticket fact
- The available context would require confidential credentials
- An emergency operating procedure already defines the next action
- The technician cannot verify the suggested change or source
- The customer's approval or an authorised specialist is required first

6. Admin dashboard and ticket queue

Triage work and keep the operational queue accurate.

Dashboard

The dashboard provides workload indicators and shortcuts to add or view tickets. Use it as an overview, then use Tickets for filtered operational work.

- Review open and waiting work
- Check priority distribution
- Watch first-response and resolution trends
- Inspect unbilled value where applicable

Ticket queue

1. Open Support Desk > Tickets.
2. Filter by status, priority, customer or resource.
3. Open high-impact unassigned tickets first.
4. Confirm customer, subject and description.
5. Assign the WordPress support user and resource team.
6. Set the status and priority.
7. Add a reply, internal note or time entry as appropriate.

Create an admin ticket

1. Open Support Desk > Add Ticket.
2. Select the customer.
3. Enter subject, priority and description.
4. Add product/service and website context when relevant.
5. Choose assigned staff and primary/additional resources.
6. Save and confirm the generated ticket number.

Delete with care

Deleting a ticket removes the ticket and its related operational records according to the plugin's cleanup logic. Prefer closing normal work. Delete only confirmed test, duplicate or invalid records and ensure no billing or evidence must be retained.

Warning	Ticket deletion is not a routine closure action.

Triage procedure

1. Review new Open tickets and identify business impact.
2. Correct an obviously inappropriate priority while explaining the reason internally.
3. Confirm customer matching and identify duplicate or related tickets.

4. Assign a support owner and the correct primary/additional resources.
5. Send a public acknowledgement or first useful response according to the service process.
6. Move the status only when it accurately represents the next action.
7. Set a follow-up owner outside Service Desk if the organisation uses a separate scheduling system.

Queue-reading guide

Queue signal	Manager question	Typical action
Urgent or High	Is the impact confirmed?	Validate, assign and respond
Open and unassigned	Who owns first action?	Assign immediately
Pending for a long time	Is work active or merely parked?	Update, schedule or change status
Waiting on Customer	Was a clear question sent?	Follow up or resume after reply
Resolved	Is confirmation/sign-off complete?	Close or return to active work
Unbilled value	Are entries eligible and reviewed?	Prepare a billing batch

Safe correction and duplicate handling

Correct customer, subject, assignment, status or priority from the ticket edit screen and leave a useful internal explanation when the change affects ownership or reporting. If two records describe the same request, choose one master ticket, place the other number in an internal note, move necessary customer-visible information to the master through an appropriate reply, and close the duplicate according to policy. Delete only when retention rules permit it.

7. Customers and resources

Maintain the people and organisations used for access, matching and assignment.

Customer maintenance

1. Open Support Desk > Customers.
2. Search or select the customer.
3. Update company, contact, primary email, additional emails, domains and phone.
4. Confirm CRM and Accounting references where shown.
5. Save and test access if an email address changed.

Resource maintenance

1. Open Support Desk > Resources.
2. Add or edit the resource.
3. Link the correct WordPress user and optional HR employee.
4. Maintain contact details, role, rate, currency and capacity.
5. Deactivate people who should no longer receive new assignments.

Assignment meanings

Assignment	Use
Assigned user	WordPress support owner
Primary resource	Lead technician/resource
Additional resources	Other team members who need assigned-ticket access

Customer email changes and access

Changing a customer email can change which WordPress account resolves to that customer. Before saving, confirm the requested address through the organisation's approved identity process. After saving, test with a customer-level account and confirm the previous address no longer grants access if it was removed. Additional addresses should be named, current and authorised; domains should be used only for controlled company mail domains.

Resource onboarding

1. Create or identify the person's named WordPress account.
2. Create the resource record and link that exact user.
3. Set role/title, contact details, rate, currency and capacity from approved information.
4. Keep the resource Active and assign a disposable test ticket.
5. Sign in as the resource and confirm only assigned work appears.
6. Remove the test assignment and verify access follows the change.

Resource change and offboarding

1. List the person's Open, Pending and Waiting tickets.

2. Assign a new primary resource and support owner where needed.
3. Preserve historical time and timeline entries under the original person.
4. Deactivate the resource so new assignments and portal access stop.
5. Disable or remove the WordPress account according to the site's account policy.
6. Check shared devices, documentation ownership and scheduled work outside the plugin.

8. Replies, status and handover

Keep the ticket conversation understandable to customers and colleagues.

Customer-visible reply

- State what was checked
- Explain the result in plain language
- Give the next action and owner
- Ask one clear question when waiting on the customer
- Avoid internal speculation and confidential operational details

Internal handover note

- Current diagnosis and evidence
- Steps already completed
- What must happen next
- Dependencies or scheduled date
- Time already logged
- Risks and escalation owner

Status discipline

Do not use Pending as a permanent holding state. Use Waiting on Customer when action genuinely rests with the customer, Resolved when a solution has been delivered and Closed when the record is complete.

Write a complete public reply

1. Open with the confirmed outcome or current state.
2. State what was checked or changed without exposing internal-only information.
3. Explain what the result means in language appropriate for the customer.
4. Give the next action, owner and any required timing.
5. If waiting, ask a specific question the customer can answer.
6. Proofread names, links, dates and ticket references before saving.

Write a reusable handover

Handover element	Example content type
Current state	What works, what fails and the current status
Evidence	Error wording, timestamps, tested device or relevant record IDs
Completed actions	Checks and changes with their results
Next action	Exact task, owner and dependency
Customer expectation	What was promised and when
Commercial context	Billable choice, approval or scope boundary

Handover element	Example content type
Risk	Access, availability or data concern requiring care

Reopening and closure

If new customer information shows that a Resolved ticket is not complete, move it to Open or Pending, explain what changed and assign the next action. Close only when no further action is expected and required sign-off or commercial records are complete. A later unrelated problem should receive a new ticket so lifecycle and time remain understandable.

9. Time tracking and billing batches

Record support effort accurately and prepare controlled billing.

Log time

1. Open the ticket.
2. Choose a time preset or enter minutes.
3. Add a concise work note.
4. Select billable or non-billable correctly.
5. Confirm the responsible resource and rate context.
6. Save and verify the ticket total changes.

Billable versus non-billable

Choice	Typical use
Billable	Contract-permitted diagnosis, repair, onsite preparation or support work
Non-billable	Warranty, goodwill, internal training, duplicate handling or excluded work

Create a billing batch

1. Open Support Desk > Billing.
2. Review customers with unbilled minutes and value.
3. Choose the customer and optional period.
4. Create the batch.
5. Review total time, amount, currency and status.
6. Create the Accounting invoice only after review.

Rounding

The configured billing increment influences charge calculation. Keep work notes accurate even when commercial rounding is applied, and review the customer agreement before invoicing.

Time-entry quality standard

Record the actual work period in minutes and describe the outcome, not merely 'support'. A useful note identifies the diagnostic, configuration, communication or repair completed. Select billable only when the customer agreement and work scope allow it. The resource and rate context should reflect the person and commercial arrangement used for that work.

Weak note	Improved note
Checked issue	Reproduced login failure in customer account and confirmed email mismatch
Fixed site	Updated approved setting, cleared cache and verified checkout on desktop/mobile

Weak note	Improved note
Call	Reviewed reproduction steps with customer and confirmed next evidence required
Admin	Prepared billing batch and reconciled three eligible time entries

Review a billing batch

1. Confirm the batch customer and period.
2. Compare each selected time entry with its source ticket and note.
3. Check minutes, increment rounding, rate, amount and currency.
4. Remove or correct ineligible work before invoicing through the supported workflow.
5. Confirm the Accounting customer and service product mapping.
6. Create the invoice once and record its resulting reference.
7. If the response is uncertain, check Accounting before repeating the action.

Correcting time

If a saved time entry is wrong, use the available management controls and organisation policy to correct it before batching. If it has already entered a billing batch or invoice, do not create a compensating entry without billing approval; preserve the audit trail and follow the Accounting correction process.

10. Customer analytics

Read the on-screen service overview without exposing another customer's information.

Customer view

The customer analytics shortcode and full portal show ticket measures for the logged-in customer's matched record. Use the overview to understand volume and status, then open individual tickets for context.

- Ticket counts
- Status distribution
- Recent ticket history
- Available service indicators

Admin analytics

Support Desk > Analytics shows status and priority counts, average first-response time, average resolution time and total billable time value. Trends depend on consistent status changes, first public responses and time capture.

Interpretation	A metric is a signal, not a complete quality judgement. Read exceptional tickets before acting on averages.

How the measures are formed

Measure	Depends on	Interpret carefully when
Ticket count	Accurate customer matching and date scope	Duplicates or test tickets exist
Status distribution	Consistent lifecycle use	Pending is used as a holding state
First-response time	First qualifying staff response timestamp	Work occurred outside the ticket
Resolution time	Status timestamps	Tickets are reopened or closed without resolution
Billable value	Complete time, rates, currency and billable flags	Commercial rules changed during the period

Use analytics for service review

1. Choose the customer and reporting period when the screen provides them.
2. Compare current counts with the previous equivalent period.
3. Open the tickets behind any unusual average or status count.
4. Separate one exceptional incident from a repeated service pattern.
5. Agree one operational action and the measure that will show improvement.

Data-quality checks

- Close confirmed test and duplicate tickets appropriately
- Keep customer matching accurate

- Record the first public response in Service Desk
- Use status transitions consistently
- Log work on the ticket where it occurred
- Review missing or exceptional rates before relying on value totals

11. Customer/job-card sign-off

Capture approval on the correct ticket after work is complete.

Technician-assisted sign-off

1. Open the completed ticket on the resource portal.
2. Confirm the work summary and ticket number with the customer.
3. Open the sign-off control or secure link.
4. Ask the signer to enter their own name/email and review the consent text.
5. Let the customer draw the signature.
6. Submit and wait for confirmation.
7. Verify the signature record is visible before leaving the site.

Customer self-service sign-off

1. Open the secure link supplied for the ticket.
2. Confirm the ticket identity and completion information.
3. Enter signer details.
4. Draw the signature and accept the stated consent.
5. Submit once.

If a signature fails

- Do not repeatedly submit
- Confirm connectivity and that the token belongs to the correct ticket
- Preserve the completed work note
- Escalate to an administrator if the record does not appear

Prepare the ticket for sign-off

1. Confirm all agreed work and validation are recorded in the ticket.
2. Write a customer-readable completion summary.
3. Check time entries and status for accuracy.
4. Confirm the signer is authorised under the organisation's process.
5. Open the sign-off page for the correct ticket and review the ticket number together.

Signing on a touch device

1. Keep the device on the sign-off page and avoid browser navigation.
2. Enter the signer's own name and email.
3. Read the consent statement before drawing.
4. Use Clear if the drawing needs to be restarted.
5. Submit once and wait until confirmation appears.
6. Return to the ticket and verify the new signature record and resulting status.

Corrections and repeat signatures

A later submission creates another signature record rather than replacing earlier evidence. If the wrong ticket was presented, the signer details are wrong or the completion statement needs correction, stop and inform a manager. Record the reason, correct the ticket through the normal process and obtain a new signature only when authorised; do not try to disguise the earlier record.

12. Email-created tickets

Use email without breaking ticket threading.

Create a ticket by email

Send the support mailbox a meaningful subject and plain description. The bridge submits it to Service Desk, which matches the sender by exact email or approved company domain and may create a customer if administrators allow it.

Reply to an existing ticket

Keep the ticket reference, for example `[NSD-1001]`, in the subject. Removing or changing it can cause the reply to be treated as a new request.

Duplicate prevention	Send one reply and wait for confirmation. The bridge should include a message ID so retries are not duplicated.

Write an email that becomes a useful ticket

- Put the affected product or service and symptom in the subject
- Use a plain-text description with expected and actual behaviour
- Include the affected URL when appropriate
- State timing, impact and safe checks already performed
- Send from the authorised customer address
- Remove signatures or quoted history that adds no diagnostic value

How matching and threading work

A new sender is matched first through the customer information configured by the administrator. Exact authorised email addresses are safest. An approved company domain may be used when enabled, and an unknown sender may be rejected or used to create a customer depending on policy. For an existing ticket, the human-readable ticket number in the subject is the primary threading cue.

Email recovery guide

Outcome	Action
No receipt or portal ticket	Check the recipient and Sent folder, then report time/subject to support without resending repeatedly
New ticket instead of reply	Tell support both ticket numbers and retain the correct number in future subjects
Duplicate reply	Report the message time and message ID if available; do not delete evidence
Wrong customer	Stop replying and notify support immediately so matching can be corrected

13. Daily operating routines

Use repeatable checks to prevent tickets from disappearing into the queue.

Start of day

- Review Urgent and High priorities
- Check unassigned Open tickets
- Review Waiting on Customer tickets that have new replies
- Confirm today's assigned or onsite work
- Check failed inbound mail or AI connection notices

During the day

- Update status when ownership changes
- Log time at the end of each work block
- Use internal notes for handover
- Keep customer replies specific
- Capture sign-off immediately after completion

End of day

- Save or clear mobile drafts
- Review tickets left Pending
- Confirm billable time is recorded
- Hand over urgent unresolved work
- Sign out of shared devices

Resource shift checklist

Point in shift	Required review
Start	Assigned Urgent/High work, new assignments, customer replies and scheduled commitments
Before each job	Ticket identity, customer/site, approval, latest notes and required access
After work block	Public/internal update, time entry, status and next owner
Handover	Evidence, remaining action, dependency and promised timing
Finish	No unsaved drafts, urgent work handed over and shared device signed out

Manager queue cadence

At least once during the working period, review unassigned Open tickets, long-running Pending work, Waiting tickets with new customer replies, Resolved work needing sign-off, and billable time that lacks useful notes. The exact frequency should match service commitments, but ownership must never depend on someone remembering an email alone.

Weekly service hygiene

- Review inactive or incorrectly linked resources
- Find customer records with duplicate or obsolete email addresses
- Confirm long-waiting tickets have a clear next action
- Review representative public replies and internal handovers
- Reconcile unbilled work and unexpected currency/rate values
- Report failed mail, AI or integration events to the correct owner

14. Troubleshooting for users

Solve common access and workflow problems before escalating.

Quick fixes

Problem	Check
No customer tickets	Signed-in email matches a Service Desk customer email
No assigned resource tickets	Resource is active, user is linked and ticket is assigned
Changes not visible	Save confirmation and cached page; refresh after cache purge
AI option missing	Administrator enabled embedded AI and the required portal assistant
AI web mode fails	Web research and API are enabled
Email reply became new ticket	Ticket number remained in subject
Signature canvas resets	Update to current assets, avoid private-browser storage restrictions and retry
Time total wrong	Minutes, billable choice, rate and selected resource

What to include when escalating

- Ticket number
- Your role and page used
- Device/browser
- Exact action taken
- Exact message shown
- Time of the event
- Screenshot without secrets
- Whether retrying in a normal private test session changes the result

A repeatable problem-solving method

1. Confirm the account and role being used.
2. Record the page URL, ticket number, action and exact message.
3. Refresh once after confirming the previous action finished.
4. Clear filters or use a private browser session for an access comparison.
5. Check whether the same issue occurs on another permitted ticket or device.
6. Stop before repeating an action that could create a duplicate ticket, reply, signature or invoice.
7. Escalate with the smallest evidence set that reproduces the problem.

Role-specific access checks

Symptom	Check in order
Customer sees no tickets	Signed-in email; customer primary/additional email; correct portal page
Customer sees wrong organisation	Sign out; report account email and organisation immediately
Resource sees no tickets	Linked user; active resource; primary/additional assignment; cleared filters
Manager menu missing	WordPress role and Service Desk capabilities
Sign-off denied	Correct ticket link/token or authorised logged-in relationship
AI action denied	Enabled feature; rate limit; ticket assignment/manager access

Protect information while escalating

A useful screenshot shows the relevant control and message, but it should hide passwords, tokens, full licence keys, private customer content and unrelated browser tabs. Provide ticket number, timestamp, role, browser/device and reproduction steps first. Send confidential evidence only through the organisation's approved support channel when an authorised responder requests it.

15. Glossary and shortcode reference

Use the product's terms consistently.

Glossary

Term	Meaning
Customer	Organisation/contact whose email controls portal ticket access
Resource	Support worker linked to a WordPress user and assignable to tickets
Internal note	Staff-only timeline entry
Billing batch	Selected unbilled time grouped for invoicing
AI resource	Approved indexed knowledge used by Ticket AI
Sign-off token	Secure value linking a public approval screen to one ticket

Shortcodes

Shortcode	Purpose
`[nomad_support_portal]`	Full customer portal
`[nomad_support_ticket_form]`	Ticket form only
`[nomad_support_customer_analytics]`	Customer analytics only
`[nomad_support_agent_portal]`	Assigned-resource portal
`[nomad_support_resource_portal]`	Resource portal alias
`[nomad_support_ticket_signoff]`	Sign-off screen
`[nomad_support_signature_form]`	Sign-off alias

Navigation reference

Task	Typical location
Customer creates/reviews ticket	Website Support Desk portal
Resource works assigned ticket	Website Support Agent Desk
Manager triages queue	WordPress > Support Desk > Tickets
Create staff ticket	WordPress > Support Desk > Add Ticket
Maintain customers/resources	WordPress > Support Desk > Customers / Resources
Review service measures	WordPress > Support Desk > Analytics
Prepare time billing	WordPress > Support Desk > Billing
Configure service	WordPress > Support Desk > Settings / AI Settings

Data and visibility reference

Record	Customer can see?	Resource can see?	Manager can see?
Customer-visible reply	On own ticket	When assigned	Yes
Internal note	No	When assigned	Yes
Time entry	Interface-dependent summary	When assigned	Yes
AI analysis	Only if deliberately copied to public reply	When authorised	Yes
Signature	On authorised ticket context	When assigned	Yes
Other customer's ticket	No	No unless assigned	Yes with support capability

Frequently asked questions

Question	Answer
Can I reply by email?	Yes when the configured bridge is active; retain the ticket number in the subject
Does Pending mean waiting for the customer?	No. Use Waiting on Customer when customer action is required
Does AI make the change?	No. It returns suggestions or draft text for a user to verify
Why can a resource not see a ticket?	The linked active resource must be primary or additional assigned resource, or otherwise authorised
Can a signature be overwritten?	No. A later submission creates another evidence record
Should normal completed tickets be deleted?	No. Close them; deletion is for controlled exceptional cases

16. Role-based quick procedures and records

Use these consolidated procedures for onboarding, supervision and audit without losing the detail in earlier chapters.

Customer procedure

1. Sign in and verify the correct organisation.
2. Search existing tickets before creating a related request.
3. Create one ticket with impact, evidence and expected result.
4. Keep the ticket number in email replies.
5. Respond promptly when the status is Waiting on Customer.
6. Review the completion summary before sign-off or closure.

Resource procedure

1. Review assigned work and confirm the next-action owner.
2. Read the complete timeline before diagnosing.
3. Record customer-safe communication separately from internal reasoning.
4. Log accurate time and choose billable status according to policy.
5. Set the lifecycle status and verify the saved result.
6. Complete a structured handover for unfinished work.

Manager procedure

1. Triage impact, customer matching and duplicates.
2. Assign the support owner and resource team.
3. Monitor unassigned, urgent, long-pending and newly answered waiting work.
4. Review communication, time quality, sign-off and billing readiness.
5. Maintain customers and resources through controlled access changes.
6. Escalate platform failures with reproducible evidence.

Records to retain

- Ticket timeline and status history
- Public replies and internal handover notes
- Time entries and billing-batch linkage
- Customer sign-off evidence
- Approved AI sources and saved operational decisions
- Access, customer email and resource changes according to policy

17. Practical communication and handover examples

Use these structures as prompts, then replace every placeholder with the verified facts of the actual ticket.

First-response structure

- Acknowledge the specific issue and its observed impact
- State what support has confirmed so far
- Name the next diagnostic or action and its owner
- Give an honest timing expectation when one is known
- Ask only for information that is necessary and safe to share

Example pattern	We have confirmed [observed fact]. [Owner] will [next action]. To continue, please provide [specific non-secret evidence]. The ticket remains [status] while [owner] acts.

Waiting-on-customer structure

- Explain why the requested information is needed
- Ask a numbered, answerable question
- Give a safe method for collecting the evidence
- State what must not be included, such as a password or token
- Move to Waiting on Customer only after the request is visible in the ticket

Resolution and handover structures

Record	Include
Resolution reply	Issue, confirmed cause where known, work completed, validation, customer next step and closure/sign-off expectation
Internal handover	Current state, evidence, completed checks, remaining action, dependency, owner, promised timing and risk
Time note	Action performed and outcome, detailed enough to support review
Reopen note	What new fact changed the earlier resolution and who now owns action

18. Service Desk Agent users and access

Create and operate the single all-access Free role while keeping customer access separate.

Service Desk Agent access

- All tickets, customers, resources and assignments
- Public replies, internal notes, time and sign-off
- Analytics, billing batches and Accounting invoice actions
- Support Desk settings and embedded AI resources/settings
- Service Desk user creation and ticket deletion

All-access role	Free does not provide separate manager, dispatcher, technician or reporting permissions. Every Service Desk Agent has complete Service Desk access.

Create a user

1. Open Support Desk > Users.
2. Enter the required username and email and optional name fields.
3. Enter a password or leave it blank for secure generation.
4. Choose whether WordPress should email the login/set-password notification.
5. Select Create User.
6. Confirm the account appears in Existing Service Desk Users and shows an active resource.
7. Test login, Support Desk access and unrelated wp-admin blocking.

Login and menu behaviour

A non-administrator Service Desk Agent lands on the Support Desk dashboard. The WordPress menu is reduced to Support Desk, unauthorised direct administration URLs redirect to the desk, and the front-end admin bar is hidden. WordPress Administrators remain unrestricted.

Access review

1. Review the Existing Service Desk Users list regularly.
2. Confirm each person still requires complete Service Desk access.
3. Reassign active tickets before disabling an account.
4. Disable the WordPress login and deactivate the resource according to the organisation's offboarding policy.
5. Retain historical replies, time and sign-off records.