NOMAD SMALL BUSINESS SUITE

Nomad Support Desk Pro - Detailed User Guide

A complete operating manual for the Free plus Pro service desk, including attachments, notifications, structured email, quotes, onsite jobs, PDF reporting, mobile technician workflows, billing, sign-off and embedded Ticket AI.

Edition: 1.1.3
Audience: Customers, technicians/resources, support managers, billing staff 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. Pro workspace and lifecycle

Understand the combined Free plus Pro product used by every role.

Combined product

Service Desk Pro extends the active Free foundation. Users work in one Support Desk, not two separate ticket databases. Pro adds premium actions to the same customer, resource, ticket, time, sign-off and AI workflows.

AI architecture	Ticket AI is embedded in Service Desk Pro 1.1.3. The separate AI Support Agent plugin is not required.

Lifecycle

Status	Operational meaning
Open	New or active request
Pending	Work is underway or scheduled
Waiting on Customer	Customer action is required
Resolved	Solution/work delivered
Closed	Final completion, often after confirmation or sign-off

Pro information on a ticket

- Customer-visible and staff-only files
- Additional contacts/notification emails
- Quote required and quote records
- Onsite required and site details
- Customer email events
- PDF reporting eligibility
- Embedded AI analysis and sources

Choose the correct workspace

Role	Workspace	What is intentionally limited
Customer	Website Support Desk portal	Only the authorised customer's tickets and customer-visible content
Resource/technician	Website Support Agent Desk	Assigned tickets and permitted staff/customer content
Support manager	WordPress Support Desk screens	Full operational queue under granted capabilities
Billing/finance	Billing and linked Accounting workflow	Commercial records according to assigned access
Administrator	Settings, AI Settings and Licence	Configuration restricted to trusted users

Read the ticket before acting

1. Confirm ticket number, customer, subject, status and priority.
2. Review product/service, website, quote and onsite requirements.
3. Check assignment and additional resources so responsibility is clear.
4. Read public replies, internal notes and events in chronological order.
5. Review files and their visibility before downloading or forwarding anything.
6. Check time, quote and sign-off state before changing completion status.

Lifecycle and next-action ownership

Use Open for new or reactivated work, Pending while support owns active or scheduled action, Waiting on Customer after a clear customer request, Resolved when the agreed solution or work is delivered, and Closed after the completion record is final. Status changes may notify customers and affect analytics, so accompany a meaningful change with an understandable public reply or internal explanation as appropriate.

2. Customer portal - creating a detailed ticket

Give support enough information for rapid triage.

Create the ticket

1. Sign in and open Support Desk.
2. Select New Ticket.
3. Enter a specific subject.
4. Choose the priority responsibly.
5. Select Product / Service and enter Website URL when relevant.
6. Describe expected behaviour, actual result, timing, changes and business impact.
7. Select Quote Required or Onsite Required only when applicable.
8. Complete site and additional-contact fields where shown.
9. Attach permitted supporting files.
10. Review for secrets, then submit once.

Useful attachments

- Screenshot showing the full message and page context
- Small diagnostic text/log excerpt with secrets removed
- Example CSV or document that reproduces the issue
- Photo relevant to an onsite job
- Approved specification or requirement

Avoid

- Passwords and private keys
- Full licence keys unless specifically required by authorised support
- Payment-card or bank credentials
- Unrelated personal information
- Executable or unapproved file types
- Very large raw backups when a small example will reproduce the issue

Sign in and verify customer identity

1. Sign in through the site's normal account page.
2. Open Support Desk and confirm the displayed organisation and recent tickets are yours.
3. If the organisation is wrong, sign out without opening records and notify support immediately.
4. If no customer is found, give support the signed-in email and organisation; do not create repeated accounts.

Complete premium request fields

Field	Complete it when	Quality rule
Product / Service	A named product or service is affected	Use the recognisable product name
Website URL	The request concerns a site/page	Use the relevant HTTPS address
Quote Required	A priced proposal is requested	This is a request, not approval to begin
Onsite Required	Physical attendance may be needed	Complete the site details
Site/contact	Onsite work selected	Use current operational details
Additional contacts/emails	Other people are authorised for the case	Include only necessary recipients

Submit and check the result

Review the description and every selected recipient/file before submitting. Press the button once, wait for confirmation and note the ticket number. Open the new ticket to confirm fields and attachments saved. If something is missing, add a reply or ask support to correct the ticket; do not create a duplicate request solely to amend a detail.

3. Customer files, replies and notifications

Share evidence safely and understand which updates generate messages.

Add a public reply

1. Open the ticket.
2. Read the latest support response and status.
3. Enter one clear reply.
4. Attach only permitted customer-visible files.
5. Submit and wait for confirmation.

Secure downloads

Customer-visible files appear through secure download controls for the authorised customer. Do not copy protected download URLs into public channels. If access fails, sign in with the customer account associated with the ticket and retry from the ticket page.

Notification events

When enabled, Pro may email on ticket creation, public replies, customer-visible updates, status changes and new customer-downloadable files. A message is a notification; the ticket portal remains the authoritative record.

Multiple recipients	Additional contacts may receive ticket information. Ask an administrator to remove anyone who should no longer be included.

Reply with a file

1. Open the correct ticket and read the most recent public response.
2. Write what the file demonstrates and how it was produced.
3. Choose only a permitted, necessary file with secrets removed.
4. Confirm the reply is customer-visible and submit once.
5. Wait for confirmation, then verify the reply and file appear in the timeline/file area.

Notification versus ticket record

An email may summarise creation, reply, status, visible-update or customer-file activity, but the portal is the authoritative record. If an email and portal appear different, sign in through the known website rather than relying on a copied link. Check the current ticket status and latest public reply before responding.

Recipient changes

- Ask a manager to add only people authorised to receive the ticket's content
- Remove recipients when their role in the case ends
- Do not use an additional-recipient field as a general mailing list
- Remember that removing an address cannot retract messages already delivered
- Report an incorrect recipient immediately with ticket number and event time

4. Ask Support AI and ticket analysis

Use built-in knowledge and web research without sending unnecessary private data.

Before opening a ticket

1. Choose the permitted research mode.
2. Describe the issue without secrets.
3. Run Ask Support AI.
4. Verify sources and uncertainty.
5. Use the result in the description if it improves the request.
6. Edit it so it remains factual.

During ticket review

1. Open the ticket as an administrator or assigned resource.
2. Run analysis against resources, web or both.
3. Ask a focused follow-up question.
4. Review likely causes and diagnostic steps.
5. Insert a draft customer reply or internal work note.
6. Edit and verify before saving.

Safe use

- Treat suggestions as hypotheses until tested
- Confirm plugin and platform versions
- Back up before risky changes
- Do not expose credentials
- Escalate uncertainty
- Keep citations with claims when sharing a web-derived answer

Select a source mode

Mode	Use it for	Verification
Provided resource files	Approved manuals and internal knowledge	Check product/version and resource title
Resource files + internet	Internal instructions plus current public context	Compare sources and identify uncertainty
Internet only	Current public documentation or incidents	Keep private ticket details out of the query

Evaluate the result

1. Read the issue assessment and uncertainties first.
2. Open cited sources and confirm they support the specific claim.
3. Separate observed ticket facts from suggested causes.

4. Put reversible diagnostics before higher-impact changes.
5. Confirm the instruction applies to the installed version and environment.
6. Escalate any step that requires unavailable authority, backup or specialist review.

Use generated text responsibly

Insert proposed reply only for customer-appropriate communication; insert work note for internal reasoning. Both actions copy editable text into the normal form. Remove unsupported claims, add the actual owner and expected result, confirm no private value is included, then save through the standard ticket action. The user who saves the final text remains responsible for it.

5. Email ticket template

Create structured tickets from Outlook or another email client.

Download and use the template

1. Open the customer Support Desk page.
2. Select Download Email Template.
3. Open the plain-text template in the email client.
4. Keep every field label unchanged.
5. Replace the placeholder values.
6. Attach approved files if the mailbox bridge supports them.
7. Send to the configured support address.

Important fields

Field	How to complete it
Product / Service	Name the affected product
Website URL	Use the relevant page/site URL
Licence Key	Provide only when authorised and necessary
Quote Required	Use the requested yes/no format
Onsite Required	Use the requested yes/no format
Site details	Complete only for onsite work
Additional Contacts	People relevant to the case
Additional Notification Emails	Authorised recipients only

Thread replies

After a ticket number is issued, keep `[NSD-####]` in the subject. Changing labels or removing the ticket reference reduces structured parsing and threading reliability.

Template completion example pattern

Keep each original label and replace only its placeholder. Use a short product name, a complete website address when relevant, explicit Yes or No values for quote/onsite questions, and one authorised notification email per expected entry format. Put the human description under the description label rather than changing labels to prose headings.

Before sending

- Send from an email authorised on the customer account
- Keep every field label exactly as downloaded
- Delete unused placeholder values rather than sending them as real data
- Review additional recipients and onsite details
- Attach only permitted files within the configured limit

- Remove passwords, API keys, private tokens and unnecessary personal information
- Keep a copy of the sent message and wait for one ticket receipt

If parsing or threading fails

Outcome	Recovery
Fields appear only in description	Tell support which labels/client were used; use the original template next time
Reply becomes a new ticket	Give support both numbers and retain the correct `[NSD-####]` subject reference
No attachment	Check bridge/file policy; send a portal reply rather than repeatedly resending
Duplicate created	Stop retries and report subject, time and message ID if available

6. Technician/resource mobile workflow

Manage assigned Pro tickets and files on site or at a desk.

Find and open work

1. Sign in with the linked resource account.
2. Open Support Agent Desk.
3. Search and filter by status/priority.
4. Sort the list and page through results.
5. Open the assigned ticket.
6. Review site details, quote state, files, conversation and time.

Complete an update

1. Use Ticket AI when useful.
2. Change status appropriately.
3. Write a public reply or internal note.
4. Attach customer-visible files to public communication or mark operational files staff-only.
5. Log time with a clear note.
6. Save using the sticky mobile action and wait for confirmation.

Pro mobile file tools

- Collapsible ticket-file list
- Mobile file upload
- Customer-visible/staff-only distinction
- Secure download links
- Responsive stacked file/time information

Unsaved draft

Update text can be kept locally on the device. Review restored text before submitting and clear it when the ticket is complete or the device is shared.

Prepare for onsite or remote work

1. Confirm the ticket is assigned to you and review the latest conversation.
2. Check product, website, site/contact details, quote state and approval notes.
3. Download only files needed for the task and keep them in approved storage.
4. Identify what evidence, access or customer availability is required.
5. Set the status and customer expectation before starting if scheduling changed.

Complete the mobile update

Control	Required choice
Public reply / internal note	Who should see the entry
File visibility	Customer-visible or staff-only
Status	Who owns the next action
Minutes	Actual work duration
Billable	Commercial policy
Resource	Person who performed the work

Weak connectivity procedure

Write the update and keep necessary work evidence before pressing Save. Submit once and wait. If connectivity fails, do not assume the action was lost: reconnect, reopen the ticket and inspect the timeline, file list and time table. A locally restored draft is not a saved server record. Review it against the current ticket before submitting, and avoid duplicate time or replies.

7. Attachments and visibility

Put each file in the correct audience context.

Upload from admin ticket

1. Open the ticket.
2. Find Ticket Files.
3. Enter a note explaining the file.
4. Select one or more permitted files.
5. Select Staff-only files if the customer must not see them.
6. Upload and confirm each file's visibility.

Attach to a reply

Files on a customer-visible reply are customer-downloadable. Files on an internal note remain staff-only. Confirm the internal-note checkbox before submitting sensitive operational material.

Before saving	Recheck the visibility choice. Moving a file after a customer notification may not retract information already received.

Download safely

- Use the ticket's download button
- Do not publish secure URLs
- Confirm file identity before opening
- Scan unexpected archives
- Report a missing or incorrect file rather than guessing

Visibility decision guide

Content	Recommended visibility
Customer screenshot or approved deliverable	Customer-visible
Public troubleshooting instructions	Customer-visible
Internal diagnostic log or configuration export	Staff-only unless sanitised and approved
Technician handover document	Staff-only
Quote/proposal intended for customer	Customer-visible through the approved commercial process
Credential or private key	Do not upload

Upload verification

1. Check file name, type, size and contents before choosing it.
2. Write a note explaining what it is and its date/version.
3. Select customer-visible or staff-only deliberately.

4. Upload once and wait for the saved file entry.
5. Open the secure download through the same ticket to confirm integrity.
6. For customer-visible files, verify the intended customer view with a controlled account when required.

Incorrect file or visibility

Stop sending further notices or links. Record the ticket, file and time, then notify the support/security owner. Use supported controls to remove or restrict the file according to policy and determine whether any customer or additional recipient already received a notification or download. Replacing the file does not undo an earlier disclosure.

8. Admin ticket management

Triage, assign and control premium ticket data.

Create a ticket

1. Open Support Desk > Add Ticket.
2. Choose the customer.
3. Enter subject, priority and description.
4. Complete product, URL, quote and onsite fields.
5. Add additional contacts/notification emails where authorised.
6. Assign the support user, primary resource and additional resources.
7. Save and verify the number and notification outcome.

Edit the full ticket

- Status and priority
- Subject and description
- Assignment
- Product/service and website
- Quote and onsite requirements
- Site details
- Additional recipients
- Files and replies
- Time and signatures

Triage order

Handle Urgent impact first, then High; distinguish genuine urgency from convenience. Check unassigned work, waiting tickets with new customer replies and approaching onsite commitments.

Structured triage

1. Validate the customer and authorised recipient list.
2. Read the description and inspect only necessary files.
3. Confirm quote/onsite flags and product/site context.
4. Set impact-based priority and identify duplicates or related work.
5. Assign the support owner, primary resource and additional resources.
6. Send a useful acknowledgement and set the next-action status.

Edit premium data safely

Change	Before saving
Additional recipient	Confirm authority and exact address
Customer-visible file	Confirm content and audience

Change	Before saving
Quote required	Confirm request and commercial owner
Onsite required/site	Confirm need, location and contact
Assignment	Confirm active linked resource and handover
Status	Confirm notification and next action

Duplicate and related tickets

Choose a master ticket, record related numbers in an internal note and preserve customer-visible information in the appropriate timeline. Do not merge by copying staff-only content into a public reply. Close duplicates according to policy and keep commercial documents, time and sign-off linked to the correct master record. Delete only controlled test or invalid data when retention allows.

9. Quote/proposal requests

Turn a support finding into an authorised commercial document.

Prepare line items

1. Confirm the customer and requested scope.
2. Open the ticket quote area.
3. Add product code/name/description as appropriate.
4. Enter quantity, unit price and tax rate.
5. Review subtotal, tax and total.
6. Choose Accounting quote or force the fallback only when appropriate.
7. Create and open the result for final review.

Accounting quote

When Accounting Pro is detected, the created quote enters the Accounting workflow. Use Accounting for approval, customer delivery, acceptance and conversion according to its own controls.

Fallback PDF

When Accounting is unavailable or fallback is selected, download the Service Desk quote/proposal PDF, verify numbering/validity/totals and send it through the approved business process.

Scope	Do not start chargeable work solely because Quote Required was selected. Wait for the business's required approval.

From request to approved scope

1. Confirm the requested outcome and what is outside scope.
2. Verify the customer and billing/contact information.
3. Build line items with clear descriptions, quantities and unit prices.
4. Apply the approved tax rate, currency and validity period.
5. Review subtotal, tax and total independently.
6. Create the chosen quote route once and open the result.
7. Obtain approval through the organisation's commercial process before chargeable work.

Accounting versus fallback

Route	Use when	After creation
Accounting quote	Accounting Pro is the controlled commercial system	Manage delivery, acceptance and conversion in Accounting
Fallback Service Desk PDF	Accounting route is unavailable or an approved fallback is chosen	Verify PDF, deliver/record approval through the defined process

Quote quality and correction

- Ticket and quote customer match
- Number is unique and the validity date is correct
- Product descriptions define deliverables and exclusions
- Quantity, unit price, tax and currency are approved
- Totals match the visible line calculation
- A changed quote follows the commercial revision process; do not silently replace an already issued PDF

10. Onsite jobs and customer sign-off

Use mobile details before arrival and capture completion evidence before leaving.

Before travel

- Confirm site name/address
- Confirm contact and phone
- Review issue and access requirements
- Check attachments and prior work
- Confirm quote/approval when chargeable
- Ensure the ticket is assigned to you

At the site

1. Open the ticket on the mobile portal.
2. Record diagnostics and work performed.
3. Attach an approved photo/document with the correct visibility.
4. Log time.
5. Set the appropriate completion status.
6. Open customer sign-off.
7. Let the customer review and sign.
8. Verify the signature record before leaving.

If work is incomplete

Do not capture completion sign-off as if the job were finished. Record the outcome, required parts/access/approval, update the status and schedule or hand over the next action.

Onsite preparation record

Area	Confirm
Location	Site name and complete address
Contact	Name, usable phone and availability
Scope	Issue, approval/quote and completion criteria
Access	Authorised access arrangements without storing secrets
Evidence	Required notes/files and visibility
Resource	Assigned active technician and planned timing

Onsite completion sequence

1. Confirm the ticket and completion criteria with the customer.
2. Record diagnostics, work and validation in an internal note or public update as appropriate.
3. Upload approved evidence with the correct audience.

4. Log actual time and commercial choice.
5. Write the customer-readable completion summary.
6. Present the sign-off page for the correct ticket and let the signer enter their own details.
7. Verify the saved signature and resulting status before leaving.

Incomplete, disputed or corrected work

If completion criteria are not met, record the actual outcome and next dependency and do not present the work as complete. If the customer disputes the summary, keep the ticket active and escalate the scope or quality decision. A repeat sign-off creates another evidence record; it does not erase the earlier one, so document why a new signature is required.

11. Customer PDF analytics report

Download and interpret the customer's service history summary.

Download

1. Sign in to the customer portal.
2. Open the analytics/reporting area.
3. Select Download PDF Report.
4. Open the generated file and confirm customer identity and date.
5. Store or share it according to company policy.

Interpretation

Use the PDF for an operational overview. Status counts and timing measures depend on consistent support usage. Read individual ticket context before using the report for management decisions.

Access	If the report contains another customer's information, stop sharing it and notify an administrator immediately.

What the report can show

Area	Meaning
Ticket volume	Requests associated with the authorised customer and report scope
Status distribution	Current lifecycle composition
Timing measures	Recorded first-response/resolution behaviour
Recent/history detail	Operational ticket context available to the report

Validate a downloaded report

1. Confirm the customer name and report date before sharing.
2. Compare unusual figures with on-screen analytics.
3. Open the tickets behind outliers rather than drawing a conclusion from an average alone.
4. Confirm every page belongs to the intended customer.
5. Store and send the PDF only through approved company channels.

Report limitations and correction

The PDF is a point-in-time operational summary, not an invoice, formal SLA certificate or proof that every event occurred within Service Desk. If customer matching, statuses or timestamps are wrong, correct the source records through the supported workflow and generate a new report. Preserve any previously issued report according to the organisation's records policy.

12. Customer email events

Understand when communication is sent and how to avoid confusion.

Event examples

Event	Customer expectation
Ticket created	Receipt and ticket number
Public reply	Support response and portal link
Status change	Lifecycle update
Visible update	Changed customer-facing information
Customer file added	Notice that a secure download is available

Message handling

- Use the portal as the authoritative timeline
- Keep ticket number in email replies
- Do not forward secure links publicly
- Contact support if duplicate messages persist
- Review additional recipients when team membership changes

Expected communication by event

Event	Before triggering
Creation	Customer and recipient list are correct
Public reply	Text and customer-visible files are ready
Status	New state and next action are meaningful
Visible update	Changed customer-facing data is accurate
Customer file	Visibility and download have been verified

Replying to a notice

1. Check that the sender and website link match the normal support service.
2. Open the portal directly when the content is sensitive or the link is unexpected.
3. Review the current ticket timeline.
4. If replying by email, retain `[NSD-####]` in the subject.
5. Send once and confirm the reply appears in the portal.

Missing or duplicate messages

A missing notice does not mean the ticket action failed; check the portal first. For missing mail, report event type, recipient, ticket number and time. For duplicates, keep one sample and its message headers/ID if available, then stop repeated replies while administrators inspect mail retries, hooks and connectors.

13. Time, billing and invoicing

Record effort and move reviewed work into Accounting.

Technician time

1. Choose minutes or a preset.
2. Add an accurate work note.
3. Choose billable/non-billable.
4. Confirm resource/rate context.
5. Save and check totals.

Manager batch

1. Open Billing.
2. Select a customer and date period.
3. Review unbilled minutes/value.
4. Generate the batch.
5. Check line scope and amount.
6. Create the Accounting invoice when approved.

Quality checks

- No duplicated time
- Correct customer
- Correct currency
- Correct service rate/product
- Billing increment consistent with agreement
- Quote and invoice scope aligned when relevant

Time entry standard

Field	Standard
Minutes	Actual work duration; presets are shortcuts, not guesses
Note	Action and result specific enough for review
Billable	Selected under the customer agreement
Resource	Person who performed the work
Rate/currency	Approved commercial context

Batch and invoice control

1. Select the intended customer and period.
2. Review every eligible time entry against its ticket.
3. Check duplicates, minutes, rounding, rate, amount and currency.

4. Reconcile quote scope where the work required prior approval.
5. Create the batch and review totals before invoicing.
6. Create the Accounting invoice once and confirm its ID/link before repeating anything.

Commercial exceptions

If a time entry, rate, quote or customer mapping is wrong after batching, pause invoice creation and involve the billing owner. If an Accounting response is uncertain, check the destination system before retrying. Use the approved credit/revision process for issued commercial records rather than hiding an error with duplicate or negative support entries.

14. Customers, resources and HR linkage

Keep access and assignment records current.

Customers

- Primary and additional emails
- Controlled domains
- Phone and company/contact name
- CRM/Accounting reference
- Additional notification authority

Resources

- Linked WordPress user
- Optional HR employee
- Role/contact information
- Rate/currency/capacity
- Active status

Offboarding

1. Reassign open tickets.
2. Deactivate the resource.
3. Remove or disable the WordPress login according to policy.
4. Review additional-recipient lists.
5. Retain ticket history and time records.

Customer record governance

1. Verify a requested email or recipient change through the approved customer process.
2. Maintain one primary email and only current authorised additional addresses.
3. Use company-domain matching only for controlled domains, never public mail-provider domains.
4. Test portal access after identity changes.
5. Review CRM and Accounting references without editing database IDs directly.

Resource onboarding and test

1. Create a named WordPress user and resource record.
2. Link the exact user and optional HR employee.
3. Set contact, role, rate, currency, capacity and Active state.
4. Assign a controlled Pro ticket with a staff-only file.
5. Verify the resource sees the assigned ticket/file but not another resource's ticket.
6. Remove assignment and verify access follows the change.

Offboarding completion check

- Reassign all active and scheduled work
- Preserve historical replies, time and sign-off evidence
- Deactivate the resource and handle the WordPress login
- Remove the person from additional-recipient lists
- Check downloaded files and shared-device sessions under company policy
- Transfer AI resource, quote or operating-document ownership if applicable

15. Daily manager routine

Monitor service, communication and commercial work.

Queue review

- Urgent/high tickets
- Unassigned work
- Waiting tickets with responses
- Resolved tickets awaiting closure/sign-off
- Onsite commitments
- Failed file/email activity

Commercial review

- Quote-required tickets
- Fallback PDFs awaiting delivery
- Unbilled time
- Billing batches awaiting invoice
- Unexpected rate/currency values

Quality review

- Public replies are clear
- Internal notes contain handover information
- Files have correct visibility
- Additional recipients remain authorised
- AI suggestions were verified before use

Start-of-day manager procedure

1. Validate Urgent and High impact.
2. Assign new Open tickets.
3. Review customer replies on Waiting tickets.
4. Check today's onsite commitments and resource availability.
5. Inspect failed inbound, upload, notification or connector events.
6. Review quote-required work awaiting a commercial owner.

During-day controls

- No customer-visible file is sent without an audience check
- Internal notes support a future handover
- Additional recipients remain necessary
- Pending work has an active or scheduled owner
- Time is recorded after each work block

- AI drafts are edited and verified
- Onsite completion and sign-off belong to the correct ticket

End-of-day and weekly follow-up

At day end, hand over unresolved urgent work, clear unsubmitted drafts, review Pending tickets without a next action, confirm onsite outcomes and preserve failed-event evidence. Weekly, sample attachment visibility, recipient accuracy, public reply quality, billing notes and quote state rather than relying only on queue counts.

16. Administrator routine

Maintain the platform, integrations and embedded AI.

Weekly

- Check licence status
- Review failed mail/connector logs
- Review storage growth
- Confirm backup completion
- Review inactive resources
- Check AI API failures and costs

Monthly

- Test one customer and resource account
- Test a secure file download
- Test a PDF report
- Review inbound token exposure
- Re-index changed AI resources
- Review allowed extensions and retention
- Test restore in staging

Platform health review

Area	Review
Dependency/licence	Both plugins active, one Pro runtime and valid licence
Storage	Growth, backup, restore and retention
Mail/connectors	Failures, duplicates, sender health and recipient rules
Security	Updates, extension list, report/file isolation and token handling
Commercial	Quote numbering, tax defaults, unbilled work and integration
AI	Provider availability/cost, resource freshness and audit failures

Controlled settings change

1. Record the current value, requested change, reason and owner.
2. Test the change in staging with the affected roles.
3. Back up before changes that affect schema, access or automation.
4. Apply during an approved window and clear relevant caches.
5. Run the specific premium workflow and cross-customer isolation test.
6. Record result or restore the previous value if acceptance fails.

Update smoke test

- Free and Pro version pair and Pro heading
- Licence screen and saved state
- Customer/resource access isolation
- Both attachment visibilities and secure download
- One enabled mail event and structured inbound reply
- Quote route, onsite fields and sign-off
- Customer PDF and embedded Ticket AI
- Time batch and Accounting linkage

17. Troubleshooting

Resolve common Pro workflow problems with the correct role and evidence.

User-facing problems

Problem	First checks
Upload unavailable	Pro licence/runtime and attachment setting
Upload rejected	Size, extension and server upload limit
Customer cannot see file	File marked customer-visible and correct account
Customer saw internal file	Stop sharing, verify visibility and notify administrator
No email	Event enabled, recipient valid and mail delivery logs
Duplicate email	Retry/connector duplication
Template did not parse	Field labels and plain-text body
Onsite fields missing	Onsite Required selection and saved ticket
Quote button uses fallback	Accounting detection or forced fallback
No PDF report	Pro active/licensed and correct shortcode
AI unavailable	Embedded AI setting/API mode; no extra plugin required

Escalation bundle

- Ticket number
- Role/account type
- Page and action
- Exact message
- Timestamp
- File type/size without sending confidential file unnecessarily
- Mail/connector message ID
- Browser/device
- Service Desk Free and Pro versions

Problem-solving sequence

1. Record the user role, page, ticket and exact action.
2. Wait for any current request to finish and inspect the saved ticket before retrying.
3. Confirm Free/Pro versions and licence/runtime state.
4. Check whether the base ticket action works without the premium file, mail, quote or report step.
5. Try a private session with the same authorised role and clear filters/cache as appropriate.
6. Escalate with timestamped, non-sensitive evidence.

Detailed recovery map

Symptom	Safe recovery
Upload appears stuck	Wait, then inspect file list before retrying; record type/size/result
Download denied	Open from the ticket with the correct signed-in role; verify visibility/assignment
Email absent	Confirm portal action, recipient and event; provide time to mail owner
Quote uncertain	Check Accounting/internal quote list before creating again
PDF wrong	Stop sharing, check customer/source records and regenerate only after correction
AI output wrong	Do not save it; record source/mode and use verified workflow
Sign-off missing	Check ticket timeline before resubmission and escalate token/account context

Privacy incident first response

If a user can access another customer's ticket, file or report, stop viewing and sharing it. Record the affected URL/ticket, signed-in role and time without copying more private content, then notify the administrator through the approved incident route. Administrators should preserve access logs and follow the organisation's incident process before changing or deleting evidence.

18. Shortcodes and glossary

Use the complete Pro reference when building or supporting portal pages.

Shortcodes

Shortcode	Purpose
`[nomad_support_portal]`	Full customer portal
`[nomad_support_ticket_form]`	Ticket form only
`[nomad_support_customer_analytics]`	Analytics with Pro PDF download
`[nomad_support_customer_report]`	Pro report alias
`[nomad_support_agent_portal]`	Assigned-resource portal
`[nomad_support_resource_portal]`	Resource alias
`[nomad_support_ticket_signoff]`	Sign-off page
`[nomad_support_signature_form]`	Sign-off alias

Glossary

Term	Meaning
Customer-visible file	Secure attachment available to the authorised customer
Staff-only file	Attachment restricted to support staff/resources
Additional recipient	Authorised extra email receiving selected ticket notifications
Fallback quote	Service Desk quote/proposal PDF used without Accounting quote
Structured email	Message using unchanged template labels for field parsing
Embedded Ticket AI	Service Desk-owned knowledge and research assistant

Task-to-location reference

Task	Location
Customer ticket, reply or file	Website Support Desk
Customer PDF	Customer analytics/reporting area
Assigned mobile work	Website Support Agent Desk
Full queue and premium ticket fields	WordPress > Support Desk > Tickets
Create staff ticket	WordPress > Support Desk > Add Ticket
Customers/resources	WordPress > Support Desk > Customers / Resources
Time billing	WordPress > Support Desk > Billing
Licence/configuration	WordPress > Support Desk > Licence / Settings / AI Settings

Visibility and delivery reference

Content	Customer	Assigned resource	Additional email
Public reply	Yes, own ticket	Yes	May be notified when enabled/authorised
Internal note	No	Yes for assigned ticket	No
Customer-visible file	Secure access	Yes	Notification may link to secure access
Staff-only file	No	Yes for assigned ticket	No
AI draft	Only if user saves as public reply	Authorised analysis	Only after public save/notification
Customer report	Own authorised report	Not a general resource entitlement	Share only under policy

Frequently asked questions

Question	Answer
Do I need AI Support Agent?	No. Service Desk Pro 1.1.3 owns embedded Ticket AI
Why are both plugins active?	Free is the required foundation and Pro loads the combined premium runtime
Can I email a ticket?	Yes through the configured bridge; the structured template improves field mapping
Can a customer see internal notes/files?	No when they are correctly marked staff-only
Does Quote Required authorise work?	No. Follow the commercial approval process
Where is the official ticket history?	In the portal/ticket timeline, not the notification email alone

19. End-to-end role procedures and audit records

Use the consolidated procedures for onboarding and supervision while referring to the relevant chapter for full field and recovery guidance.

Customer end-to-end procedure

1. Sign in and confirm the correct customer.
2. Search existing work before creating a new ticket.
3. Complete issue, product, quote/onsite and authorised recipient fields.
4. Attach only necessary customer-visible evidence and submit once.
5. Use the portal as the authoritative record and retain the number in email replies.
6. Review completion and sign only the correct finished work.

Technician end-to-end procedure

1. Confirm assignment, scope, site/quote state and latest communication.
2. Perform approved diagnostics and verify any AI-assisted suggestion.
3. Separate public replies/files from staff-only notes/files.
4. Record accurate time, status and next owner after each work block.
5. For onsite completion, write the summary and verify sign-off before leaving.
6. Handover unfinished work with evidence, dependency and customer expectation.

Manager and administrator procedure

1. Triage customer, impact, recipients, quote/onsite needs and assignment.
2. Monitor premium file, mail, quote, report and AI failures.
3. Review visibility and recipient accuracy before customer delivery.
4. Reconcile time, quotes, batches and resulting Accounting records.
5. Maintain customer/resource access and complete offboarding.
6. Test licence, dependency pair, isolation, backup and recovery on schedule.

Audit-quality record checklist

- Customer-visible communication states result, owner and next action
- Internal handover records evidence and remaining work
- Each file has an explained purpose and correct visibility
- Recipients are necessary and authorised
- Time notes and commercial records reconcile
- AI output is distinguishable from verified outcome
- Sign-off and status reflect the actual completion state

20. Pro roles, users and access

Use the role assigned to the account and understand the boundaries enforced by Pro 1.1.3.

Role overview

Function	Administrator	Manager	Dispatcher	Technician	Reporting Viewer
Ticket scope	All	All	All operational	Assigned only	All, read-only
Create tickets	Yes	Yes	Yes	No	No
Update ticket/status	Yes	Yes	Yes	Assigned only	No
Assign resources	Yes	Yes	Yes	No	No
Customer records	View/manage	View/manage	View	No global list	Masked in ticket views
Resource records	View/manage/link users	View/manage operations	View availability	Own link only	No
Internal notes	View/add	View/add	View/add coordination notes	Assigned tickets	Hidden
Ticket files	View/upload	View/upload	View; no upload	Assigned tickets; upload	Customer-visible only; staff files hidden
Time and sign-off	Yes	Yes	No	Assigned tickets	No
Ticket AI	Yes	Yes	No	Assigned tickets	No
Analytics/export	Yes	Operational	No analytics menu	No	Read-only operational
Billing/rates/financial quotes	Yes	No	No	No	No
Settings/AI resources	Yes	No	No	No	No
Users and roles	Yes	No	No	No	No
Permanent ticket deletion	Yes	No	No	No	No
Plugin Licence page	WordPress Administrator only	No	No	No	No

Create and assign users

1. Sign in as a Service Desk Administrator or WordPress Administrator.
2. Open Support Desk > Users & Roles.
3. Enter username, email, optional name and optional password.
4. Select the narrowest appropriate Service Desk role.
5. Choose whether to send the login/set-password email and create the user.
6. Confirm operational roles show Active resource and Reporting Viewer shows Read-only (no resource).
7. Test the account before giving it production work.

Change a role

An authorised administrator can change another Service Desk user's role from Existing Service Desk Users. The current user cannot change their own role, and WordPress Administrator accounts cannot be changed there. Changing to Reporting Viewer deactivates the assignable resource link; changing to an operational role creates or reactivates it.

What users see after login

Role	Normal landing and navigation
Administrator	Support Desk dashboard and all Service Desk menus except Licence unless also WordPress Administrator
Manager	Dashboard, tickets, add ticket, customers, resources and analytics
Dispatcher	Dashboard, tickets, add ticket, customers and resources
Technician	Dashboard and assigned tickets; mobile resource portal for field work
Reporting Viewer	Dashboard, read-only tickets and analytics

Customer/requester boundary

Customers do not receive one of the five internal roles. Portal access is based on the authorised customer relationship and shows only permitted organisation tickets, public replies, customer-visible files, scheduling/quote actions and sign-off. Internal notes, staff files, staff analytics, workloads, settings and other customers' tickets remain hidden.

Access problems

Problem	First check
Wrong menus	Assigned Service Desk role and fresh login session
Technician sees no ticket	Active resource link plus primary/additional assignment
Viewer sees masked details	Expected Reporting Viewer privacy control
Manager cannot see billing/quote creation	Expected financial restriction
Administrator cannot open Licence	Licence requires WordPress Administrator
Direct page redirects	Page is outside the role's approved Support Desk capability

21. Practical Pro scenarios

Follow the scenario that matches the work, using the earlier chapters for detailed field, security and recovery rules.

Customer request with evidence

1. Search for an existing related ticket.
2. Create one detailed request and complete product, website and impact information.
3. Choose quote or onsite only when that service is actually requested.
4. Add only authorised recipients.
5. Attach a sanitised customer-visible file and explain what it demonstrates.
6. Submit once, record the number and use the portal for progress.

Technician investigation and handover

1. Confirm assignment and read the complete public/internal timeline.
2. Review files according to their visibility and purpose.
3. Use Ticket AI only when a knowledge or evidence question remains, then verify its sources.
4. Record diagnostics and their results in an internal note.
5. Send a customer reply with the confirmed state and next action.
6. Log time, set status and write a complete handover if another resource will continue.

Commercial and onsite completion

1. Confirm quote scope and approval before chargeable work.
2. Verify site, contact, assignment and required evidence before travel.
3. During work, keep customer-visible deliverables separate from staff-only diagnostics.
4. Record actual time and validate the result with the customer.
5. Write the completion summary, capture sign-off on the correct ticket and verify it saved.
6. Reconcile quote, time, batch and invoice records before final commercial closure.

Manager exception handling

Exception	Immediate control	Next owner
Wrong customer or recipient	Stop sharing and preserve event evidence	Administrator/data owner
Wrong file visibility	Restrict delivery and assess prior access	Security/support owner
Duplicate notice/ticket	Stop retries and correlate message IDs	Mail/bridge owner
Uncertain quote/invoice creation	Check destination record before repeating	Finance owner
Incorrect report	Stop distribution and correct source data	Reporting/service owner
Unsafe AI suggestion	Do not save or act; retain source/mode for review	AI/settings owner