Ddesk Ticketing System – User Manual

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ddesk

Ticket Management from IT Service Experts.

Chapter 1. Introduction

1.1. About Ddesk

Ddesk is a web-based ticketing system. It lets you log, track and close reported problems, tasks and requests in a structured way. Everyone involved — submitters, clients, and staff — works in one shared place.

1.2. Who can use Ddesk?

1.2.1. User types

Contacts (contracted clients)
Log in with an email address and password. Manage tickets for their own organisation.

Staff / Agents
Handle ticket processing — they respond, resolve issues, and record billing.

Email users
No password-based access. They can view their submitted tickets using a magic link and PIN code sent by email.

Anonymous submitters
Can submit a ticket via a public form without logging in, if the administrator has enabled it.

1.2.2. Permission levels

Every contact and agent account has an assigned permission level:

Role	Description
Admin	Full access: user management, system settings
Manager	Can view and edit all tickets in the organisation
Senior Staff	Can edit assigned and own tickets; can also see billing amounts
Staff	Can only edit tickets assigned to them; cannot see billing amounts

Agents and contacts use the same roles, but with different scope: agents can manage tickets across multiple clients, while contacts can only access their own organisation.

1.3. Key features

- Create tickets via the web interface, email, or an anonymous public form
- Status and priority management, categorisation (with colour coding)
- Assign a responsible agent; delegate to subcontractors

- Replies, internal notes, and confidential replies
- Time tracking with categories
- Billing and client approval
- Email notifications and groups
- Reports and statistics
- Optional two-factor authentication (MFA)

1.4. System requirements

Ddesk runs in any modern browser (Chrome, Firefox, Edge, Safari). Always use the latest browser version. The system is fully responsive and works comfortably on desktops, laptops, and mobile devices alike.

Chapter 2. Login and User Interface

2.1. Login

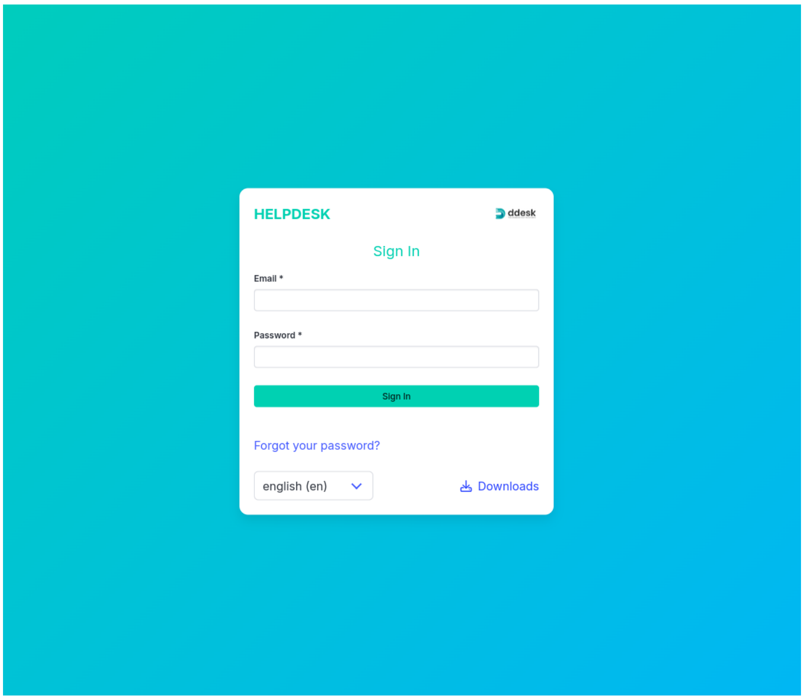

Figure 1. Login screen

Enter your registered email address and password, then click **Login**.

On the login page you can also:

- Switch the language (Hungarian / English)
- Reset your password via **Forgot your password?**
- Access the **Downloads** section — documents uploaded by the administrator (manuals, forms, etc.)

2.2. Password reset

Click **Forgot your password?** on the login page. A reset link will be sent to your registered email address. Note: for security reasons, the system does not confirm whether the email address exists in the system.

2.3. Invitation email and admin-created accounts

An administrator can invite new users directly. The invitation email contains a unique link where the user can set their own password and activate their account. Alternatively, the administrator can set the password immediately when creating the account.

2.4. Multi-factor authentication (MFA)

Ddesk supports two-step login (MFA). When enabled, you need both your password and a one-time code generated by a Google Authenticator-compatible app. Administrators can make MFA mandatory for all users.

2.5. Dashboard

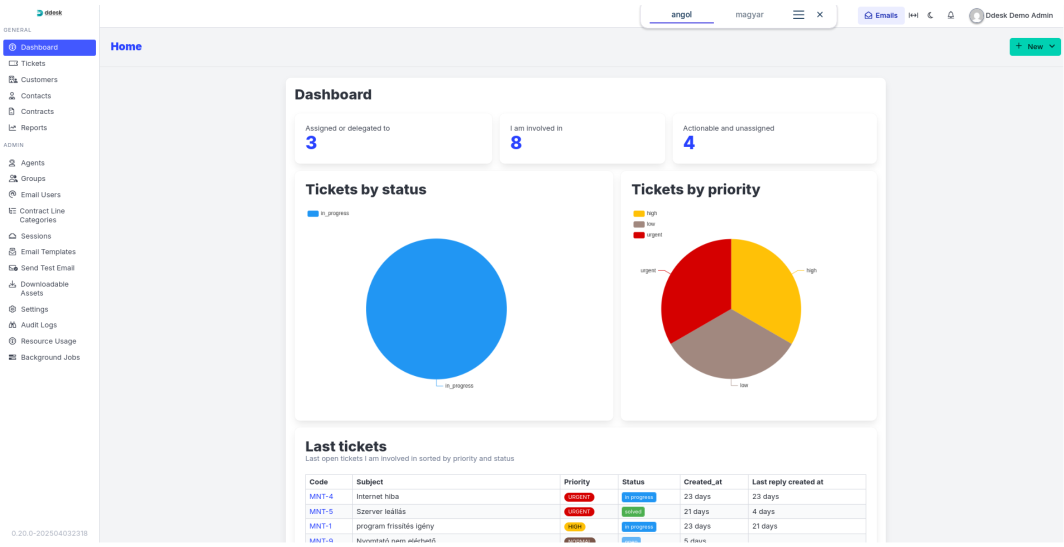

Figure 2. Dashboard

After logging in, the **Dashboard** appears. It gives an overview of active tickets: the number of tickets in each status, and quick links to relevant tickets.

2.6. Ticket list

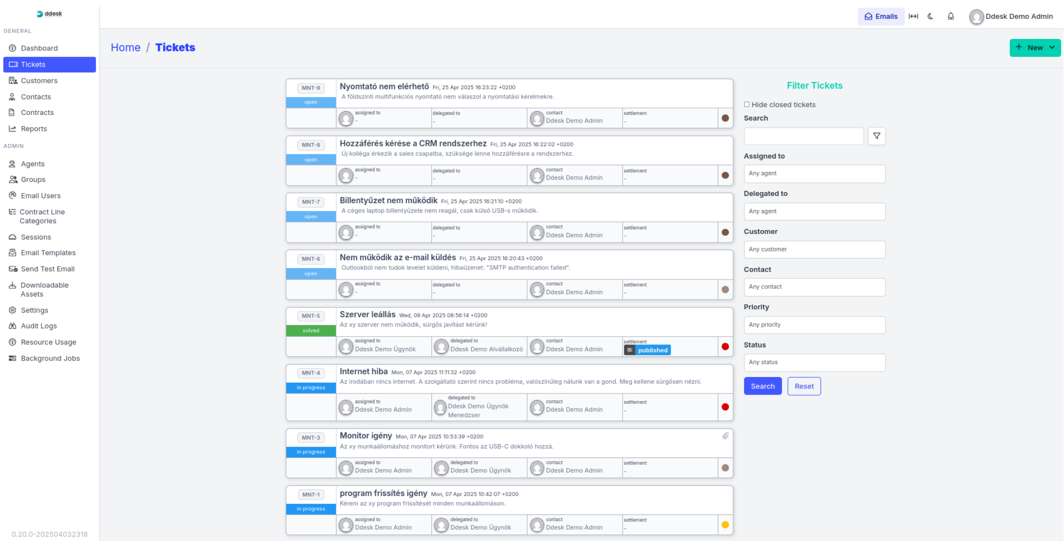

Figure 3. Ticket list

Under the **Tickets** menu, tickets are shown in a sortable, filterable list. The list shows the last update time, status, and priority — all colour-coded for quick reference.

2.7. Notifications and profile

In the top right corner:

- **Bell icon** — in-app notifications
- **Username** — access user profile, change password, log out
- Icons for adjusting the display theme

The **What’s new** link at the bottom of the sidebar shows the new features, improvements and fixes of each version. A glowing dot next to the link shows when there are changes you haven’t seen yet; the latest versions are shown first, with older versions listed as links below them.

Chapter 3. Creating a Ticket

3.1. Create via the web interface

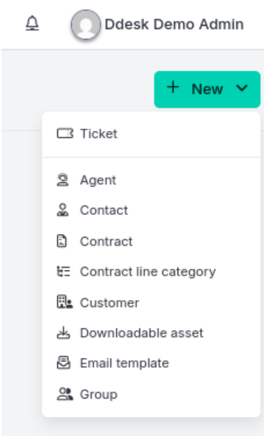

Figure 4. New ticket button

Click + **New** in the top right corner, then select **Ticket**.

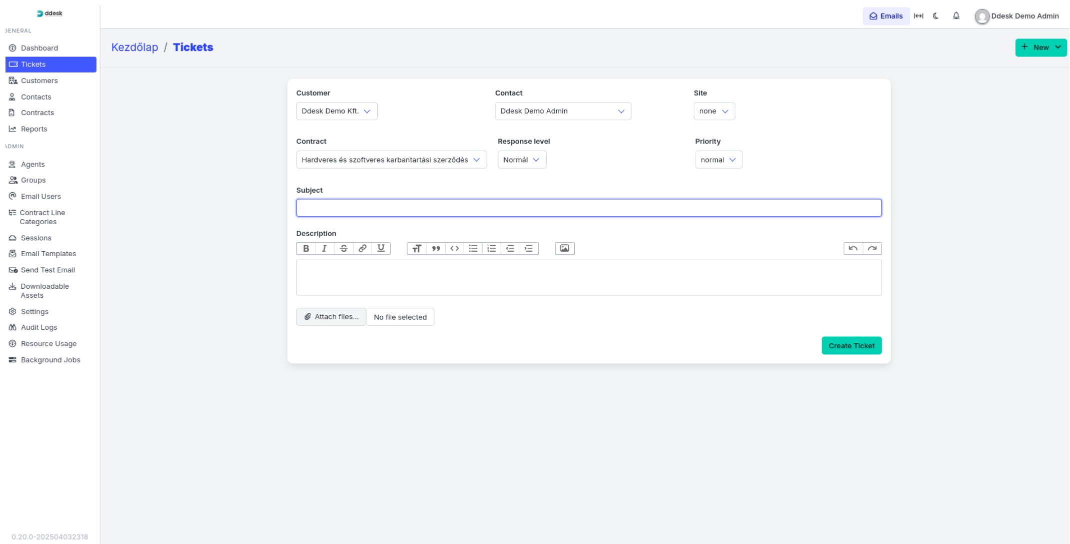

Figure 5. Ticket creation form

Fields to fill in:

- **Client** — By default, your own organisation is shown; admins can create tickets for other clients
- **Contact** — The client-side contact person
- **Site** — If the client has multiple locations
- **Contract** — Which contract covers this request
- **Response level** — If the contract offers different response time tiers
- **Category** — Optional; used to classify the ticket (e.g. hardware, software, network)
- **Priority** — A default can be configured by an admin; can also be set manually
- **Subject** — A short, clear summary
- **Description** — Detailed description of the issue or request

- **Attachments** — Screenshots or files can be added

Click **Create Ticket** to submit. The relevant notification group will be notified by email.

3.2. Create via email

Ddesk can automatically create a ticket from an incoming email. The system assigns the ticket to the correct client based on the sender's email domain.

The sender receives a confirmation email with a **magic link**. Clicking the link lets them request a PIN code, and after entering it they can view the ticket's status and history. The PIN expires, but a new one can be requested at any time using the same magic link.

Internal note via email: If you reply to a ticket notification email and include the `{{internal}}` tag in the subject, your reply is added to the ticket as an internal note — client contacts cannot see it.

3.3. Anonymous (public) submission form

If the administrator has enabled the public form, it is accessible on the login page without logging in. Fields include:

- Name, email address, phone number (required)
- Company, city, address (optional)
- Subject and description (required)

If configured, a CAPTCHA check and privacy consent acceptance may also be required. The submitter can follow up on their ticket via the magic link + PIN method, the same way as email-submitted tickets.

3.4. Notifications

An email notification is sent when a ticket is created and whenever its status changes. By default, the global notification group set in system settings receives it. If a client has its own notification group configured, that group receives notifications for tickets from that client.

Chapter 4. Managing a Ticket

4.1. Ticket detail view

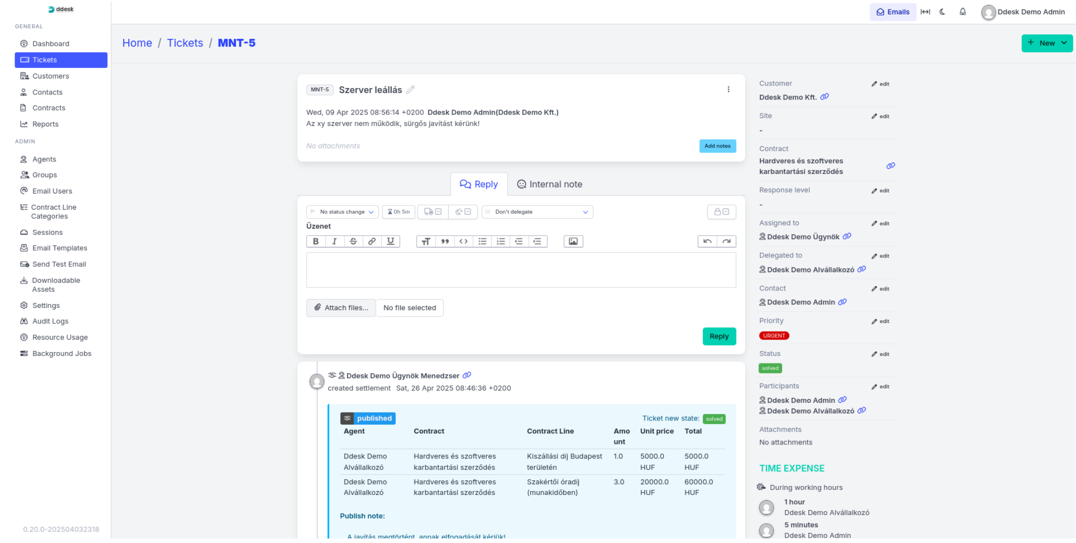

Figure 6. Ticket detail view

Clicking on a ticket opens the detail view. On the left you can see replies and activity in chronological order; on the right, the sidebar shows the ticket's metadata.

4.1.1. Sidebar contents

- **Client** — the assigned organisation
- **Site** — where the issue is located
- **Contract** — which contract covers the ticket
- **Response level**
- **Assigned to** — who is handling the ticket on the agent side
- **Delegated to** — who is actually doing the work (e.g. a subcontractor)
- **Contact** — the client-side person
- **Priority** — shown with a colour-coded badge
- **Status** — current state, shown with a colour-coded badge
- **Categories** — assigned categories, each with a colour badge
- **Participants** — people involved in the ticket
- **Attachments** — all attached files (client users cannot see attachments from internal replies)

Most sidebar fields are editable inline by clicking them, depending on permissions.

4.2. Statuses

Status	Meaning
Open	No one has started working on the ticket yet
In Progress	Resolution is actively underway
Waiting for Response	Waiting for a reply from the client
Suspended	Work is temporarily on hold due to an external reason
Resolved	Billing attached; waiting for client approval
Rejected	No action needed (e.g. false report)
Closed	Client accepted the billing; ticket is permanently closed

The Open, In Progress, Waiting for Response, Suspended, and Rejected statuses can be set freely by the responsible agent. A ticket moves to **Resolved** automatically when billing is attached, and to **Closed** when the client accepts the billing — or automatically after a configured grace period.

4.3. Priority

Four priority levels are available: **Low**, **Normal**, **High**, **Urgent**. Each can have a colour assigned. An administrator can set a default priority that applies automatically to all new tickets. A priority level cannot be deleted while any ticket still references it.

4.4. Categories

Tickets can be categorised (e.g. hardware, software, network, service). Each category can have a colour assigned, making it easy to scan the ticket list at a glance. Administrators can control whether a category is **active** (assignable to a ticket) and **searchable** in filters. Category filtering works in both the ticket list and reports.

4.5. Sending a reply

Both agents and contacts can write replies on a ticket. When submitting a reply, you can also set:

- **Status change** — change the ticket's status at the same time as sending the reply
- **On-premise flag** — mark that the work was done on-site
- **After-hours flag** — mark that the work happened outside business hours
- **Time spent** — enter time in minutes, with an optional category
- **Confidential** — limits who can see this reply

Images embedded in replies can be clicked to open a full-size view.

4.6. Internal notes

Agents can add internal notes to a ticket (**Internal Note** tab). These are **not visible to client users** — only agents can see them.

4.7. Confidential replies

Replies marked as **Confidential** carry sensitive content and have restricted visibility. The administrator can configure whether this flag is ticked by default.

4.8. Time spent summary

Below the sidebar, the ticket page shows a summary of all time logged on this ticket — broken down by staff member and category. This supports billing and internal reporting.

4.9. Ticket approval

If a client has mandatory approval enabled, newly created tickets are visible only to assigned agents and supervisors until an authorised person approves them. Who can approve:

- Members of the configured approval group
- If no group is set: contacts with Manager or Admin role

4.10. Editing the subject

An agent with Manager or Admin role can edit the ticket subject from the ticket page, as long as the ticket is not closed.

4.11. Billing

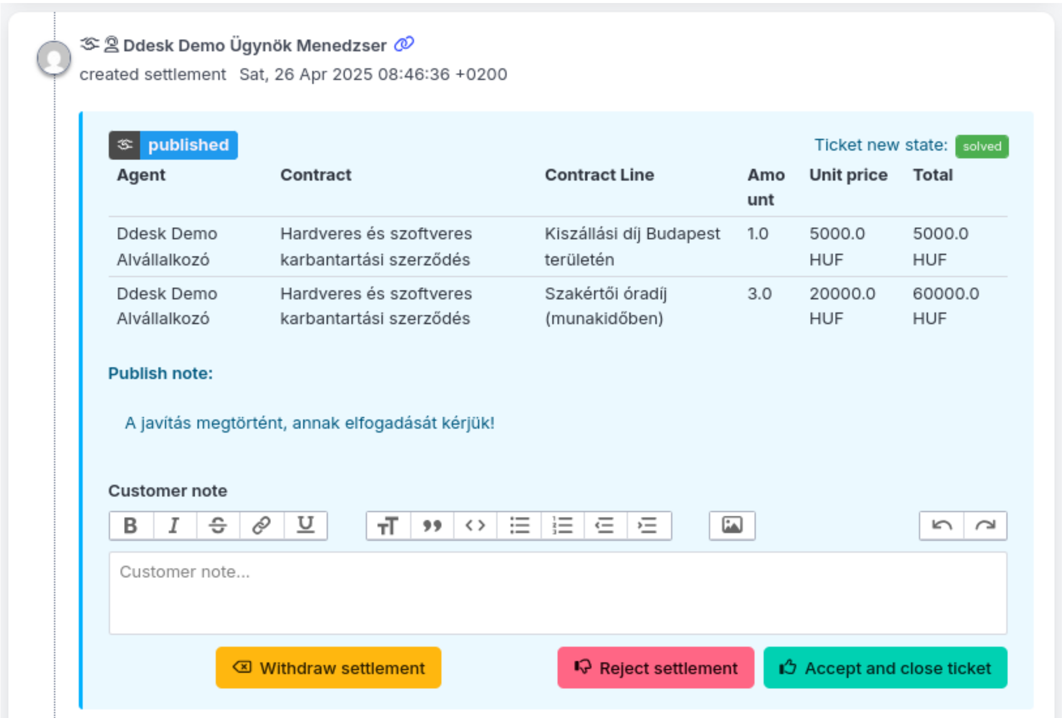

Figure 7. Billing

When billing is attached, the ticket automatically moves to **Resolved** status. The billing record includes:

- Which staff member it relates to
- Which contract line it covers
- The amount or quantity billed

Billing amounts are visible only to users with **Senior Staff** level or higher.

Acceptance and rejection

The client’s representative can:

- **Accept** → ticket automatically moves to **Closed**
- **Reject** → ticket returns to **In Progress**; a revised billing record can then be submitted

Billing can be withdrawn by either side before final closure.

Chapter 5. Filters and Reports

5.1. Searching tickets

Typing in the search field above the ticket list searches ticket subjects and descriptions; in descriptions, formatting (HTML markup) no longer produces false matches — only the actual text is matched.

Click the slider icon next to the search field to open the search options. Turn on **Search in replies too** to also match the text of replies on the ticket. A dot on the options button shows when an option is active. Contacts only get matches from replies they could see anyway — internal notes are never matched for them.

5.2. Filtering the ticket list

The ticket list can be filtered by:

- Status
- Priority
- Category
- Date and other criteria

Filters can be combined to narrow down exactly the tickets you need.

5.3. Reports

Under the **Reports** menu, the following reports are available:

Report	Content
Ticket report	Ticket list with filtering and export
Work hours report	Summary of time logged on tickets
Time by category	Time broken down by work category
Accepted settlements	Summary of closed, client-approved billing records

Chapter 6. Common Issues and Solutions

6.1. Cannot log in

- Check that the email address and password are correct.
- Use the **Forgot your password?** option on the login page.
- If MFA is required, make sure you have the authenticator app set up.
- If you still cannot log in, contact your local administrator.

6.2. Cannot see all my tickets

- Check you are in the correct view (e.g. "My Tickets" vs. "All Tickets").
- With the **Staff** role, only tickets assigned to you are visible.
- The ticket may have been assigned to a different organisation.

6.3. I submitted a ticket via email but it did not appear in the system

- Check that you sent the email to the correct address.
- The system only processes emails from domains that are configured by the administrator.
- Check your spam folder in case a bounce or feedback message arrived.

6.4. I did not receive a notification

- Check your spam folder.
- Confirm your email address is correct in your profile.
- Ask your administrator to check the notification group settings.

6.5. My company does not appear when creating a ticket

- The email domain may not be assigned to your organisation yet. Ask your administrator to add it.

6.6. Permission issue

If you cannot edit something or a ticket is not visible to you, your permission level is likely insufficient. Ask your administrator to assign the appropriate role.

Chapter 7. Settings and Administration

7.1. Personal user settings

Click your username in the top right corner to open the profile menu. From there you can:

- View your current role
- Change your password and email address
- Set your preferred language and time zone
- Manage MFA (two-factor authentication)
- View and terminate active login sessions (devices)

7.2. Managing contacts (Admin)

Admin-level users can manage their organisation's contacts:

- Add a new contact (by invitation email or by setting a password immediately)
- Edit existing details (email, phone, password, status)
- Deactivate a user
- Convert an email user to a full user account

7.3. Resetting two-factor authentication (Admin)

If a staff member or contact loses access to their authenticator app, an administrator can reset their two-factor authentication with the **Reset 2FA** button on the agent's or contact's detail page. The page also shows whether two-factor authentication is set up.

- Agent admins can reset it for any agent or contact; contact admins only for contacts of their own organisation — neither can reset their own
- The user is signed out on all devices, receives an email about the reset, and has to set up two-factor authentication again on next login

Verify the user's identity before resetting.

7.4. Groups (Admin)

Groups bring multiple users together under a shared name. Groups can be used as:

- Notification groups (for new tickets or approvals)
- Approval groups
- Error notification groups (for unprocessable inbound emails)

7.5. Client settings (Agent Admin)

Agent admins can configure the following for each client:

- **Default contact** — assigned to email-submitted tickets when the sender cannot be identified
- **New ticket notification group** — overrides the global setting for this client
- **Mandatory approval** — when enabled, tickets are restricted until an authorised person approves them
- **Approval group** — who can approve tickets; if none is set, Manager/Admin contacts can approve
- **Approval notification group** — who gets notified about approvals
- **Email domain assignment** — emails from these domains are automatically linked to this client

7.6. Data management (Admin)

Under **Admin / Data**:

Item	Description
Ticket categories	Colour + active/searchable flag + multilingual name
Priorities	Colour + default flag + multilingual name
Currencies	Active/inactive status; only active currencies appear in billing forms
Time categories	Work type categories assignable to replies
Contract line categories	Categories used in billing records

7.7. Application settings (Admin)

Settings are grouped into four tabs:

7.7.1. General

- Logo and site title
- MFA issuer name
- Global notification group (for new tickets)
- Error notification group (for emails that cannot be processed)
- Email blacklist and whitelist
- Default confidential flag for replies

7.7.2. Email and sessions

- Strip signatures from inbound emails (affects stored emails retroactively)

- Strip forwarded message blocks from inbound emails (retroactive)
- Allow rich HTML in inbound emails (tables, inline styles)
- Magic link and PIN expiry time
- Attachment availability timeout for outbound emails
- Session expiry time
- Restrict notification emails to exclude ticket content (privacy option)

7.7.3. Public form

- Enable or disable the public submission form
- Enable CAPTCHA
- Privacy consent text (Hungarian and English)
- Form title (Hungarian and English)

7.7.4. Advanced

- Custom tracking code injection (head/body top/bottom) — for analytics, chat widgets, etc.

7.8. Webhooks (Admin)

When enabled for the installation, administrators can set up webhook endpoints that receive automatic, signed HTTP notifications about ticket, reply and billing events, so external systems (chat, monitoring, reporting) stay up to date.

- Choose which events an endpoint receives: new, updated, closed or reopened tickets, status changes, assignments, delegations, approvals, new replies, and billing created/accepted/rejected/revoked
- Limit an endpoint to one or more selected clients
- Protect deliveries with an HMAC signature or a bearer token
- Failed deliveries are retried automatically; the delivery history shows every attempt and lets you cancel or resend a delivery
- Internal notes and confidential replies are only sent when explicitly enabled for that endpoint

Find these settings in the admin menu under **Webhook Endpoints** and **Webhook Deliveries**, available to admins with access to all clients.

7.9. Email templates (Admin)

Under **Email Templates** in the admin menu you can edit the templates for the emails the system sends (layout and content), and check the result in a preview.

Templates can be exported and imported as a zip file, useful for backups or moving templates between installations:

- by default, only missing templates are imported — existing, possibly customised templates are left untouched
- checking **Replace all existing templates** replaces every template with the imported content
- after import, the number of templates imported and skipped is shown
- only administrators can import templates

7.10. Downloadable assets (Admin)

Administrators can upload documents (manuals, forms, etc.) that appear under **Downloads** on the login page, accessible to everyone — even without logging in.

7.11. Audit log (Admin)

All administrative actions are logged. The **Audit Log** page is searchable and shows: the user, the action taken, the affected record, the source, the status, and the timestamp.

Chapter 8. Contact and FAQ

8.1. When to ask for help

- You cannot log in and the password reset does not help
- You cannot create a ticket
- You experience a technical error in the system
- You have general questions about using Ddesk

If your issue is related to permissions within your organisation, contact your local administrator first.

8.2. What to include when contacting support

- Your name and job title
- Registered email address
- A clear description of the problem
- What you were doing when the issue occurred
- The exact error message (if any)
- A screenshot (if possible)

8.3. Frequently asked questions

Why can I not see all my tickets?
The tickets you can see depend on your role. With the Staff role, only assigned tickets are visible.

I received a magic link but the PIN has expired. What do I do?
Click the magic link and request a new PIN. The validity period is set by the administrator.

The client rejected my billing. What happens now?
The ticket returns to **In Progress** status. You can update the details and attach a revised billing record.

How do I close a ticket permanently?
By attaching billing and having the client accept it, or by setting the ticket to **Rejected** status.

How do I edit a ticket's subject?
An agent with Manager or Admin role can edit the subject from the ticket page, as long as the ticket is not closed.

Can I add an internal note via email?
Yes. When replying to a ticket notification email, add the `{{internal}}` tag to the subject and your reply will be added to the ticket as an internal note — invisible to client contacts.

What is the difference between an internal note and a confidential reply?
An internal note is strictly visible to agents only — the client can never see it. A confidential reply also has restricted visibility, but the rules can be configured by the administrator.