SharePoint 2010 and
SharePoint 2013 Support

Groups, Roles and Permissions

SLA
Configuration

Office 365
SharePoint
Online lists and libraries

Metaoption
Cloud
for any
Enterprise

Multiple
Authentication

Custom
Fields

Intake of New
Tickets via E-Mails

Customer
Web Portal

Support
Web
Portal

MetaCaseDesk
Features

M●MetaCaseDesk

A SharePoint Based HelpDesk

Ticketing and Case Management Solution

Introduction

MetaCaseDesk is a SharePoint based ticketing solution, IT helpdesk, and case management system. It is designed and developed by MetaOption – a New Jersey based software development, consulting and IT service company. It runs seamlessly on Microsoft SharePoint server 2010 and 2013. It helps businesses to manage their internal and customer issues on a regular basis in more organized and effective manner. Its licenses are available with flexible and affordable plans. It offers technical support from experts with its every license.

Key Functionalities of MetaCaseDesk

MetaCaseDesk has all the important functionalities, which businesses expect from a ticketing tool. In addition, it has successfully managed to add many quality-driven and easy-to-use functionalities, which make its unique. Here are some of them with details:

➤ Cross AD (Active Directory) Authentication

Cross AD authentication allows businesses to access their existing set of login credentials for using MetaCaseDesk. It means businesses don't have to manage extra login credentials with a new MetaCaseDesk license.

➤ Available with On-Premise, Office 365, and MetaOption Cloud

Businesses running on SharePoint environment just need to install it on their server, and start using it immediately. However, businesses using Office 365 can access it without any major installation process, and they can even use their existing Office 365 login credentials for accessing it. Whereas, businesses not running on SharePoint environment and not using Office 365, can opt for the MetaOption cloud, which requires no maintenance work on the part of users.

➤ Multiple Business Unit Management

With the growing complexity of work, your organization may be divided into multiple business units, and at times, even into their subunits. Here, MetaCaseDesk simplifies ticket handling even in the most complex organizational structure. This is done by auto-assigning the tickets to specific business units or departments, and further, to a specific support team or support user from that particular unit.

➤ Multiple Rules for Auto-Assigning of Tickets

Ticket assigning on the part of support users can be a time-consuming as well as intricate task. The time spent on this could otherwise be spent on actually resolving the tickets. It's intricate because the support user often need to do a lot of consideration and analysis before assigning tickets to a specific business unit or department.

MetaCaseDesk simplifies using an assignment rule, which is set on the basis of keywords mentioned in the ticket's subject and body, customers accessing their products or services and sender's email addresses. Moreover, the system can easily work on multiple assignment rules created for this purpose.

➤ User Permissions Specific to Business Units

A business unit of an organization may have its own set of support users, who are trained to resolve tickets pertaining only to that particular business unit. Therefore, MetaCaseDesk offers a unique feature that helps restricting a user's permission to access to tickets related specific business unit that he or she belongs to.

➤ Knowledgebase and Recurring Ticket

It offers two functionalities to manage the recurring tickets, these are Knowledgebase and Recurring Ticket, one for the end user and the other for the support team. 'Knowledgebase' provides a list of topics to the end user, in which solutions for recurring issues are mentioned. Whereas, 'Recurring Ticket' allows support team to create the ticket templates to solve the recurring issues, which are exclusively needed to be solved by them.

➤ Multiple Ways to Create Tickets

MetaCaseDesk offers three different ways for the creation of tickets for end users. These are email, customer portal, and support portal. End users can raise the tickets via email by simply sending the email containing their issues to the support team. They can also raise the tickets via customer portal in few clicks. Moreover, they can also ask the support team to raise the tickets through support portal.

Email

Customer Portal

Support Portal

➤ Multiple Ways to Respond the Tickets

MetaCaseDesk offers three different ways for responding the tickets. These are Email, Customer Portal, and Support Portal. End users can respond to the tickets via Email and Customer Portal. Whereas, Support users can respond to the tickets via Support Portal, they also have the option to send a reply to email sent by the end users. Further, all the replies are saved and audited at the required ticket level.

➤ Multiple User Roles

MetaCaseDesk makes ticket management process immensely easier for the businesses by offering multiple user roles. These roles are end user, end user admin, support user (read-only), support user (read/write), and support user admin.

A few other notable functionalities of MetaCaseDesk

- ✅ Interactive dashboard, and email status and logs

- ✅ Integration with other SharePoint sites and third party tools

- ✅ Setting tickets priority

- ✅ Ticket tracking

- ✅ Multiple report generation, exportable in excel format

- ✅ Customer SLA (service level agreement) breached notification

How MetaCaseDesk Works?

As a ticketing solution, the primary objective of MetaCaseDesk is to manage daily issues of businesses. It allows end user to raise the ticket via customer portal, and email. Then, it creates the ticket and sends the confirmation to the end user.

Thereafter, MetaCaseDesk forwards the ticket to the support team. Support team assigns the ticket to the appropriate support user. Support user starts working on the ticket, if s/he fails to resolve the ticket, then it can be forwarded to a different support user. Whatever changes are done by the support user(s) on the ticket, MetaCaseDesk sends their details to the end user, until the ticket gets closed.

MetaCaseDesk System Requirements

MetaCaseDesk comes with a great advantage, i.e. it is easy to implement, as businesses don't need to fulfil any specific software or hardware requirement for its implementation. The entire implementation process is executed by the expert team of MetaCaseDesk.

About MetaOption

MetaOption is a Microsoft Gold Certified Partner, specialized in business applications and cloud solutions. We help mid-market and enterprise customers solve their business challenges through strategic consulting services, innovative offerings and industry-specific solutions built on the latest technologies. Some of these are online inventory management solution for the largest auto sales dealer in US, and Amazon and other popular ecommerce sites integrated service for a reputed office wholesaler. In addition, two of its outstanding and popular products are:

➤ GOIS Pro (Goods Order Inventory System)

An innovative, cross-platform, cloud based, and highly customizable inventory management solution.

➤ META Email & Fax

A Microsoft Dynamics NAV Add-on for businesses, automatically sends Invoices or Reports to your vendors or customers by Email & Fax.

MetaOption also offers other services, such as Hosting, Microsoft Dynamics NAV, CRM and GP, Microsoft SharePoint Server 2010 and 2013, IT staffing, Managed Services, Infrastructure, etc.

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