

GoTo Resolve Microsoft Teams App Instructions

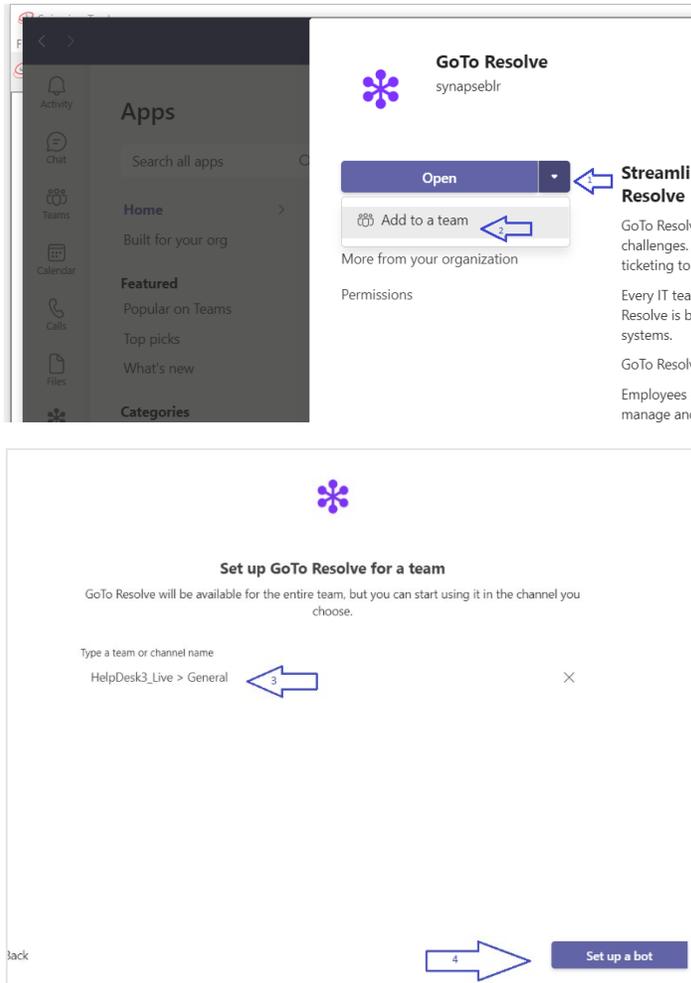
Use this document to get started with the GoTo Resolve Microsoft Teams app. This document includes guides for:

1. [Setting up the GoTo Resolve app in your Teams environment](#)
2. [Agent instructions](#)
3. [Employee or end user instructions](#)

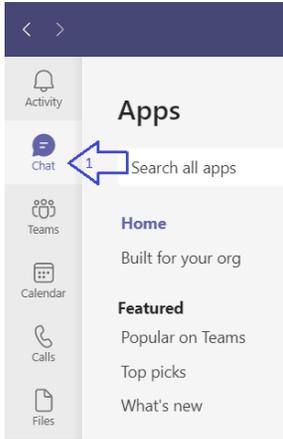
Setting up the GoTo Resolve app in your Teams environment

1. Create new teams/channels in Microsoft team, one for each help desk service. For example, if you plan to have four helpdesk services, such as IT-help, HR-help, Finance-help and Facilities-help, then you will create four teams.
 - IT-help
 - HR-help
 - Finance-help
 - Facilities-help
2. Add all of your employees to this channel. This channel will be used for creating tickets
3. Create triage teams. For example, in the scenarios above, create four more teams
 - a. IT-help-triage
 - b. HR-help- triage
 - c. Finance-help- triage
 - d. Facilities-help- triage
4. Add respective agent/technician to these four triage channels. Whenever any ticket is created, agents will get alert in these teams.

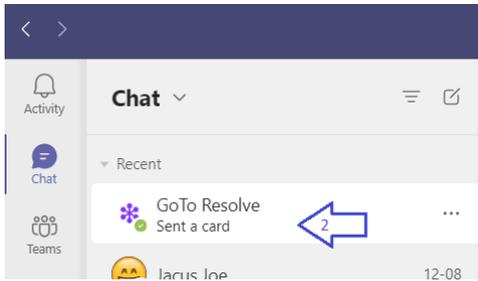
5. Install GoTo Resolve app for Microsoft Teams:
 - Find the GoTo Resolve app in the Microsoft AppSource [here](#)
 - Or directly within your MS Team app [here](#)
6. Add the GoTo Resolve app to all the teams/channels you created (i.e., IT-help, IT-help-triage, etc.)



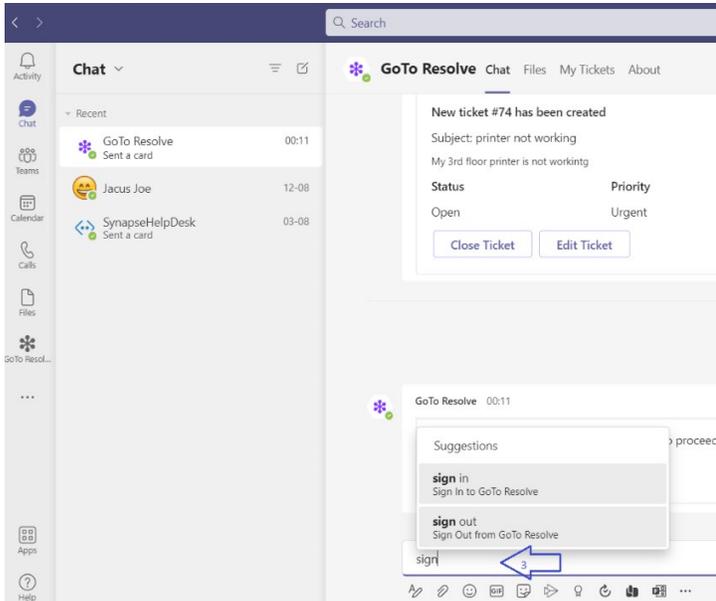
7. Configure these four-triage channel to receive the alerts



b. Select GoTo Resolve app



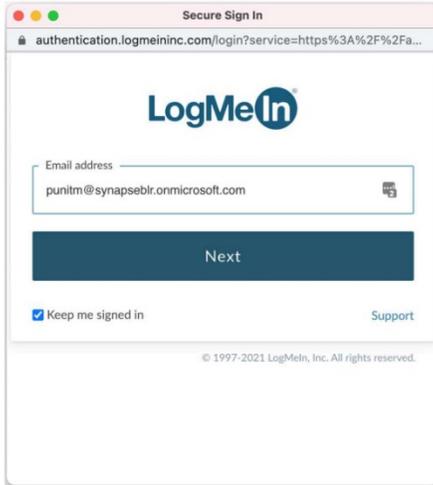
c. Select/type sign in



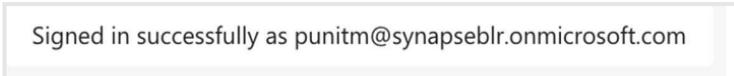
d. Sign In card will appear



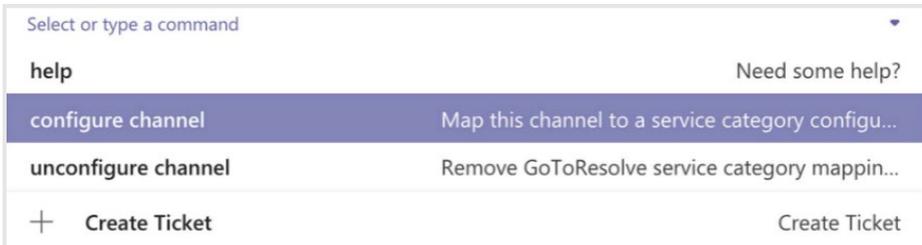
e. Clicking on Sign In will redirect to Sign-In Window



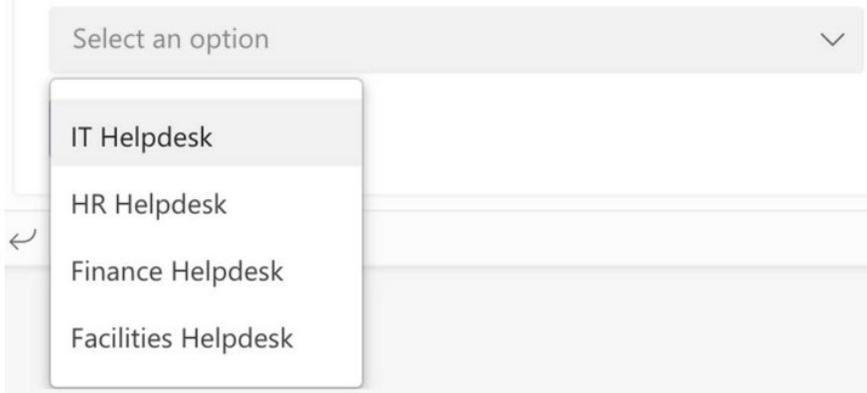
f. Complete the sign-in using Admin Credentials. After successful sign-in, below message will appear:



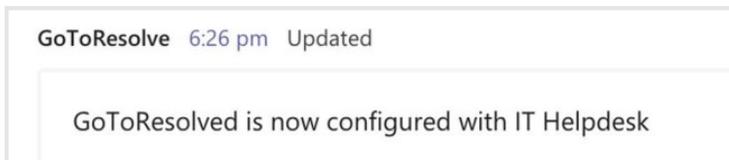
g. Navigate to each channel and mention the bot with @gotoresolve and select the "configure channel" command from the pop up



h. You will receive a card with list of services



i. Select one of the services (Say IT Helpdesk) and click submit. You will receive this if successful.

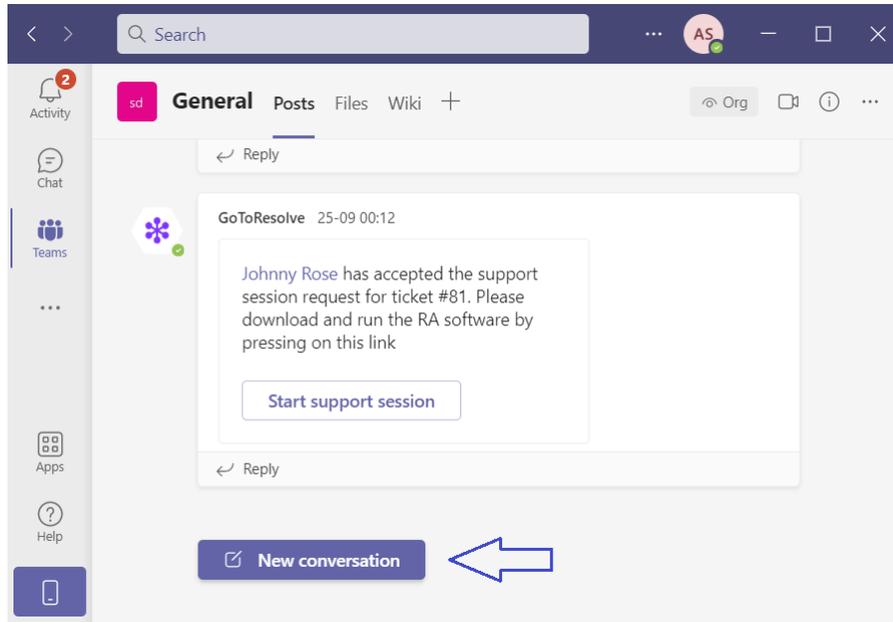


Agent Instructions

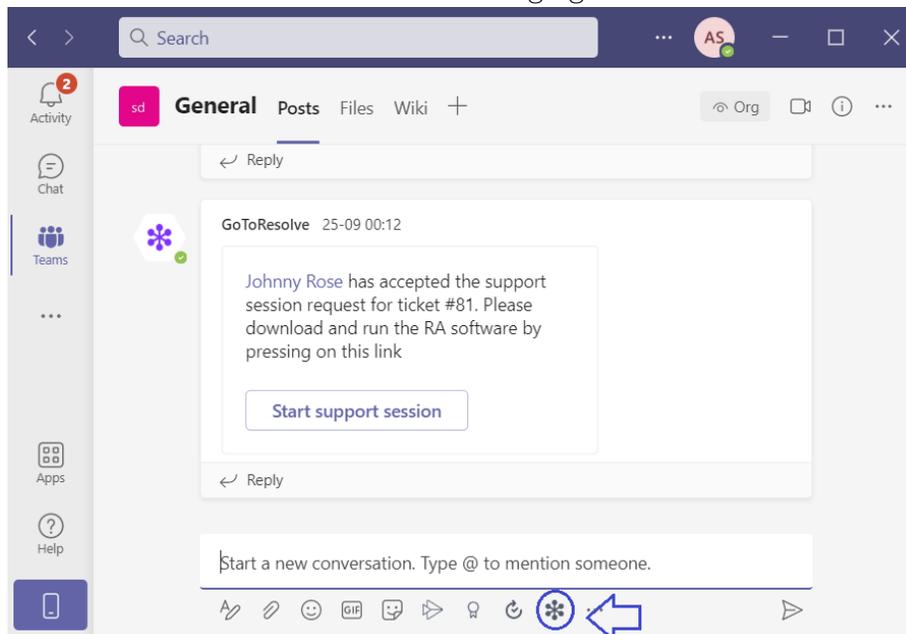
1. An admin has already created specific triage teams/channels for each helpdesk service and configured the GoTo Resolve in those channels.
2. For every ticket that gets created, notifications are posted on these triage channels.
3. An agent can go to respective triage channels and start responding to tickets.
agent/technician can assign, comment, and request a remote session.
4. If an agent would like to see all the tickets assigned to them, they must first add the GoTo Resolve app to their Teams account from the app store.
 - a. Navigate to “Apps” in Microsoft Teams
 - b. Select the GoTo Resolve app
 - c. Click the “Add” button on the top left.
 - d. GoTo Resolve can then be access from their side bar

Employee /End User Instructions

1. Admin has created specific channels where all employees can ask the question.
2. Employees can go to those channels and start creating tickets.
 - a. click "New conversation"



- b. click the "GoToResolve" icon in messaging extension.



- c. Create ticket form pops up. fill the details, hit create and you are done.

The screenshot shows a 'Create a ticket' form within the GoTo ResolveDev HelpDesk interface. At the top, there are 'Close Ticket' and 'Edit Ticket' buttons. The form title is 'GoTo ResolveDev HelpDesk Create Ticket' with a close button (X) in the top right corner. The main heading is 'Create a ticket'. The form contains the following sections:

- Summary:** A text input field with the placeholder text 'Summarize the issue briefly'.
- More details about the issue (Optional):** A larger text input field with the placeholder text 'Describe the issue'.
- Priority:** A dropdown menu currently showing 'Low'.
- Helpdesk Service:** A dropdown menu currently showing 'TechB Support'.

A purple 'Create' button is located at the bottom right of the form.

3. If an employee would like to see all the tickets created by them, they must first add the GoTo Resolve app to their Teams account from the app store.
- Navigate to "Apps" in Microsoft Teams
 - Select the GoTo Resolve app
 - Click the "Add" button on the top left.
 - GoTo Resolve can then be access from their side bar.