Ticket Management

Module for CRM

Role
UX/UI Designer

Tool Used
Figma, Miro, Photoshop

Dashboard
Total 345
Completed 156
In progress 126
Pending 30
Escalated 3
Attention Required
Team Performance
Overview
To Review

Project Overview

Design a user-friendly interface for managing tickets within a CRM platform, focusing on improving efficiency, usability, and user satisfaction.

Task

Context

- The module should allow users (e.g., support agents, team leads) to view, organize, and manage customer tickets effectively.
- The platform is used by mid-sized customer service teams handling 500+ tickets daily. Most users work on desktop interfaces. Assume a typical ticket lifecycle: New → Assigned → In Progress → Resolved → Closed.

Key features

- Dashboard Overview: A summary of ticket statuses (e.g., Open, In Progress, Resolved).
- Ticket List: A detailed view of all tickets with sorting, filtering, and search options.
- Ticket Details Page: Information about a specific ticket, including customer details, ticket history, attachments, and action buttons (e.g., Assign, Reply, Resolve).
- Collaboration Tools: Options for internal notes, tagging teammates, and prioritizing tickets.
- Analytics: Visual indicators (e.g., charts or badges) showing ticket resolution time, SLAs, and agent performance.

Requirements

- Design wireframes or low-fidelity prototypes for the following screens:
- Ticket Dashboard
- Ticket List Page
- Ticket Details Page
- Create New Ticket Modal/Page
- Define key interactions, such as ticket assignment, status updates, and comment threads.
- Ensure the design accommodates accessibility standards (WCAG).

User persona

- Support Agents: Responsible for resolving tickets.
- Team Leads: Oversee ticket statuses and team performance.
- Admins: Set up workflows and monitor overall metrics.

Approach

1 **Research**
- User persona
- Insights

2 **Define**
- Overview map
- Moodboard

3 **Design**
- Wireframes
- Prototype link

1 Research

• User Persona

• Support Agent : Sakshi Sharma

Age : 24 | Customer support executive | 3 Years Experience

1 Goal
- **Wants a quick way to find customer issues** and respond effectively.
- Needs an intuitive UI for prioritizing tickets based on urgency.
- Requires easy access to past interactions, ticket details, and resolution history.
- Needs a way to **tag colleagues or escalate issues when necessary.**

2 Pain & challenge
- Struggles with **multiple open tickets and unclear prioritization.**
- **Difficult to find past conversations** and relevant details.
- **Needs automation** for repetitive tasks like updating ticket status.

3 Features want
- **Quick sorting** by priority, category
- Ability to **tag teammates** or add internal notes for reference
- **AI-based suggestion for assigning tickets** to the right agent.

• Team lead : Rajesh Kumar

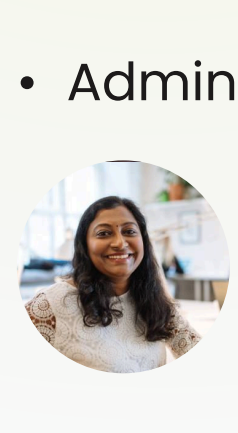
Age : 34 | Team lead | 8 Years Experience

1 Goal
- Needs an **overview of open, pending, and resolved tickets.**
- Ensures tickets are **resolved within the expected timeframe.**
- Wants insights into **agent workload, response time, and issue resolution rates.**
- Needs a system to **distribute workload fairly among team members.**

2 Pain & challenge
- Struggles to **track which agent is handling** what without constantly checking in.
- **No easy way to measure agent performance** without manually compiling data.
- **Difficulty identifying high-priority tickets** that need immediate escalation.

3 Features want
- Ability to step in, re-assign, or **add feedback on ongoing tickets.**
- Ticket backlog, response times, SLAs, and **agent performance metrics.**
- **Flags high-priority tickets** and overdue issues.

• Admin : Sneha Kumar



Age 45 | CRM Administrator | 15 Years Experience

1 Goal
- Wants deep insights into recurring issues, **ticket resolution trends, and efficiency gaps.**
- Looks for ways to **reduce manual work through** automation.
- Ensures only authorized users have access to sensitive data.

2 Pain & challenge
- Struggles to extract meaningful insights from CRM data.
- **No easy way to measure agent performance** without manually compiling data.
- Difficulty **identifying high-priority tickets** that need immediate escalation.

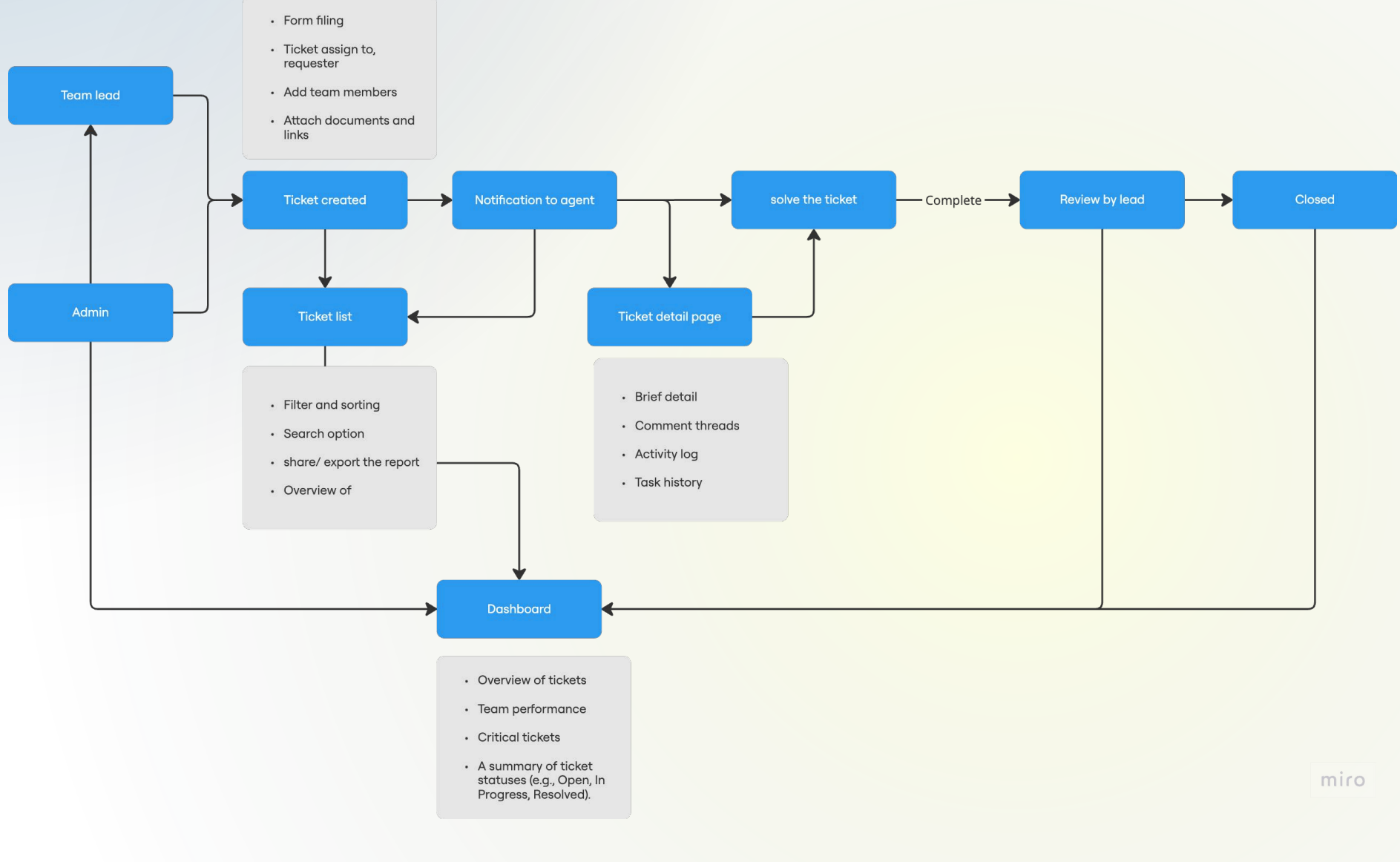
3 Features want
- **Insights into ticket trends,** resolution rates, and agent efficiency.
- **Ability to set up automated triggers** for ticket assignments, reminders, and escalations.

• Insights

- Module should be easy to use and easy to navigate.
- Help team leads to give insights about the team performance.
- Using visual cues to help user to analyse faster.
- Helping user to filter, sorting in the ticket list section.
- Module should look lighter so idea of using very light theme.
- A data-driven dashboard for team leads to monitor efficiency.
- Enable tagging, internal discussions, and team mentions.

2 Ideate

• Overview map


Team lead
Admin
Form filling
Ticket assign to, requester
Add team members
Attach documents and links
Ticket created
Notification to agent
solve the ticket
Complete
Review by lead
Closed
Ticket list
Ticket detail page
Filter and sorting
Search option
share/ export the report
Overview of
Brief detail
Comment threads
Activity log
Task history
Dashboard
Overview of tickets
Team performance
Critical tickets
A summary of ticket statuses (e.g., Open, In Progress, Resolved).
miro

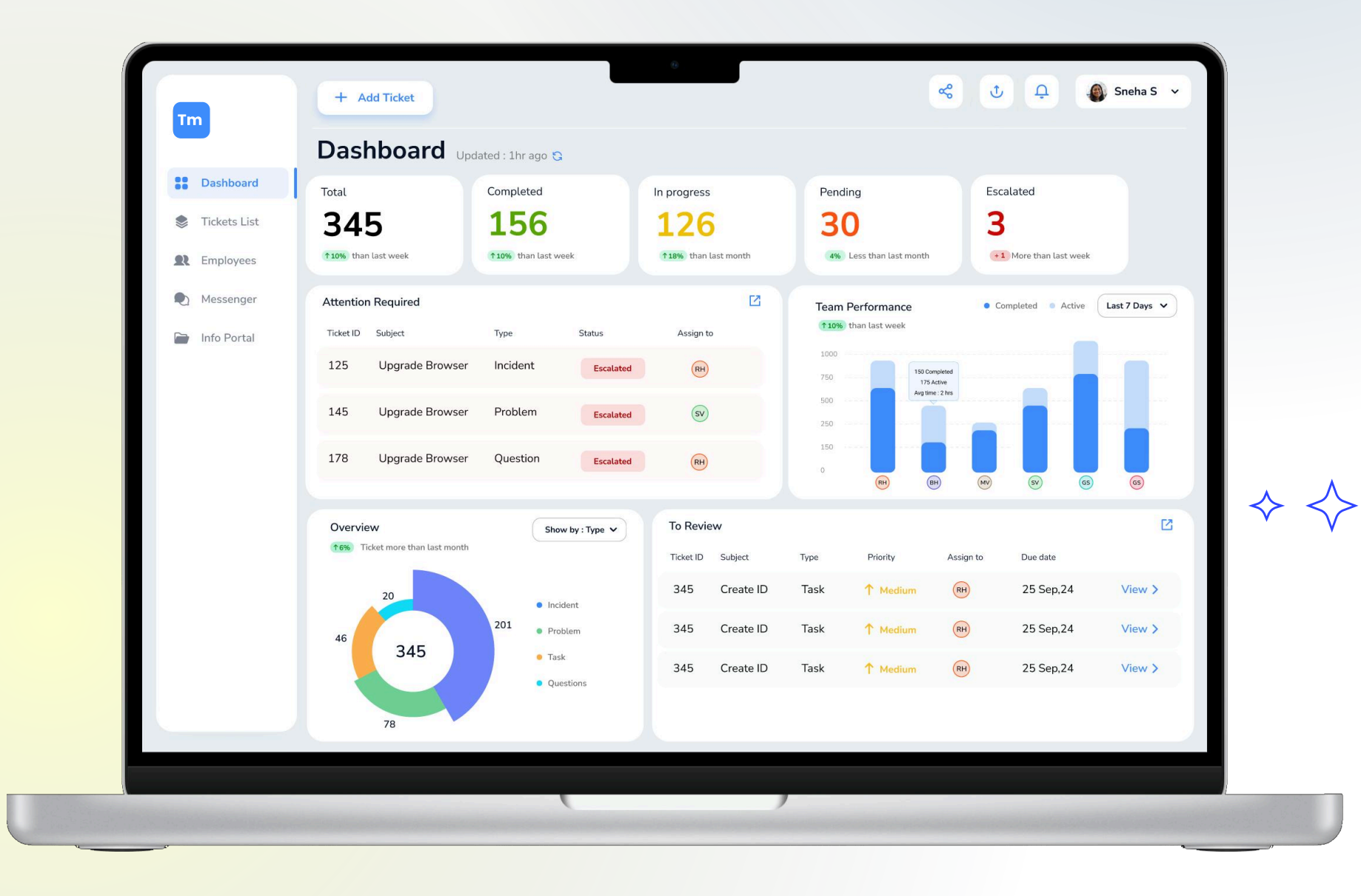
• Mood board

- Using light theme.
- Using simple colour palette which give feeling of calmness.
- Using colour to highlight numbers and critical status on dashboard and on ticket list page.
- Visual cues to read content faster

3 Design

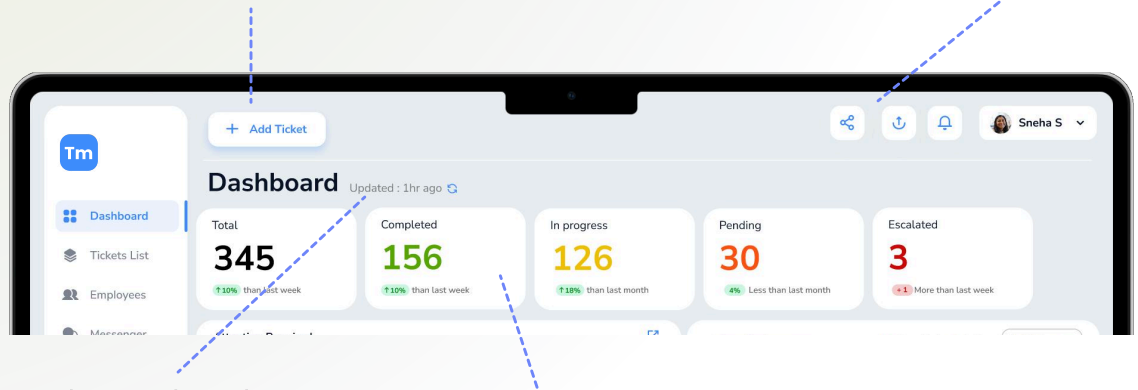
• Dashboard

- Used by leads, admin


Tm
Add Ticket
Dashboard
Updated : 1hr ago
Dashboard
Tickets List
Employees
Messenger
Info Portal
Sneha S
Total 345
Completed 156
In progress 126
Pending 30
Escalated 3
Attention Required
Team Performance
Last 7 Days
Overview
Show by : Type
To Review

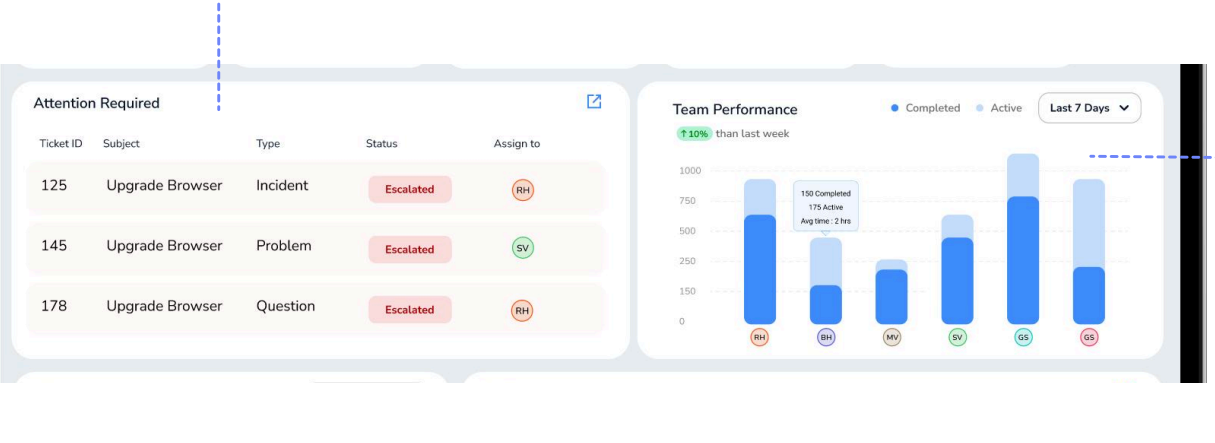
Details

- **Add ticket** on top so that at any page user can access the add ticket CTA
- **share, export , notification**



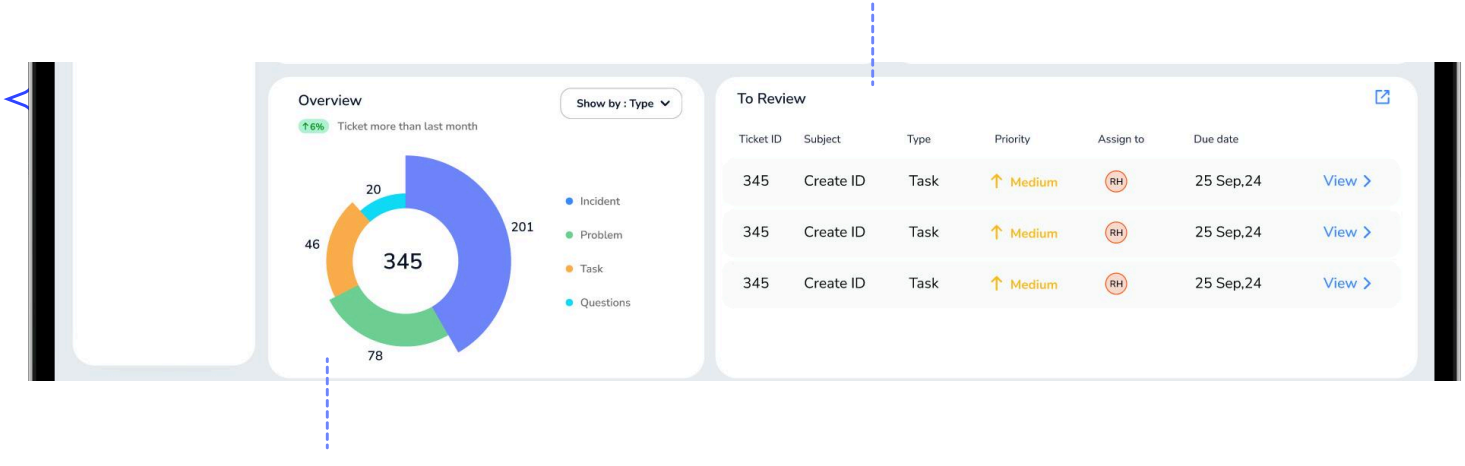
- **An Upadate info** for user to know when the that system is up to date and they can refresh by themself as well
- **Badges** to show tickets overall progress and status, and also an insight that how agents are resolving them than last month and weeks.

- **Attention Required section** to highlight critical tickets that are overdue and urgently require lead help to solve.

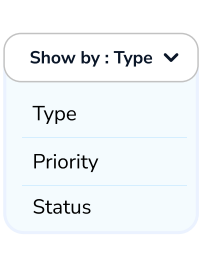

Attention Required
Ticket ID
Subject
Type
Status
Assign to
125
Upgrade Browser
Incident
Escalated
145
Upgrade Browser
Problem
Escalated
178
Upgrade Browser
Question
Escalated
Team Performance
Last 7 Days

- **Team Performance** graph that used by lead to see how the team is performing.
- Shows an **insight** how the team is performing better than last week.
- By hovering on graph user can see **tooltip for number of tickets resolve and time taken** by the agent.
- can view graph by **weekly, monthly and yearly performance using dropdown.**
- **This Section will help lead to identify the potential and weakness of the team.**

- **when a agent resolve a ticket task** it come for review to **lead dashboard** for verify before closing and decrease chances of raising issue from customer, if agent have done anything wrong.

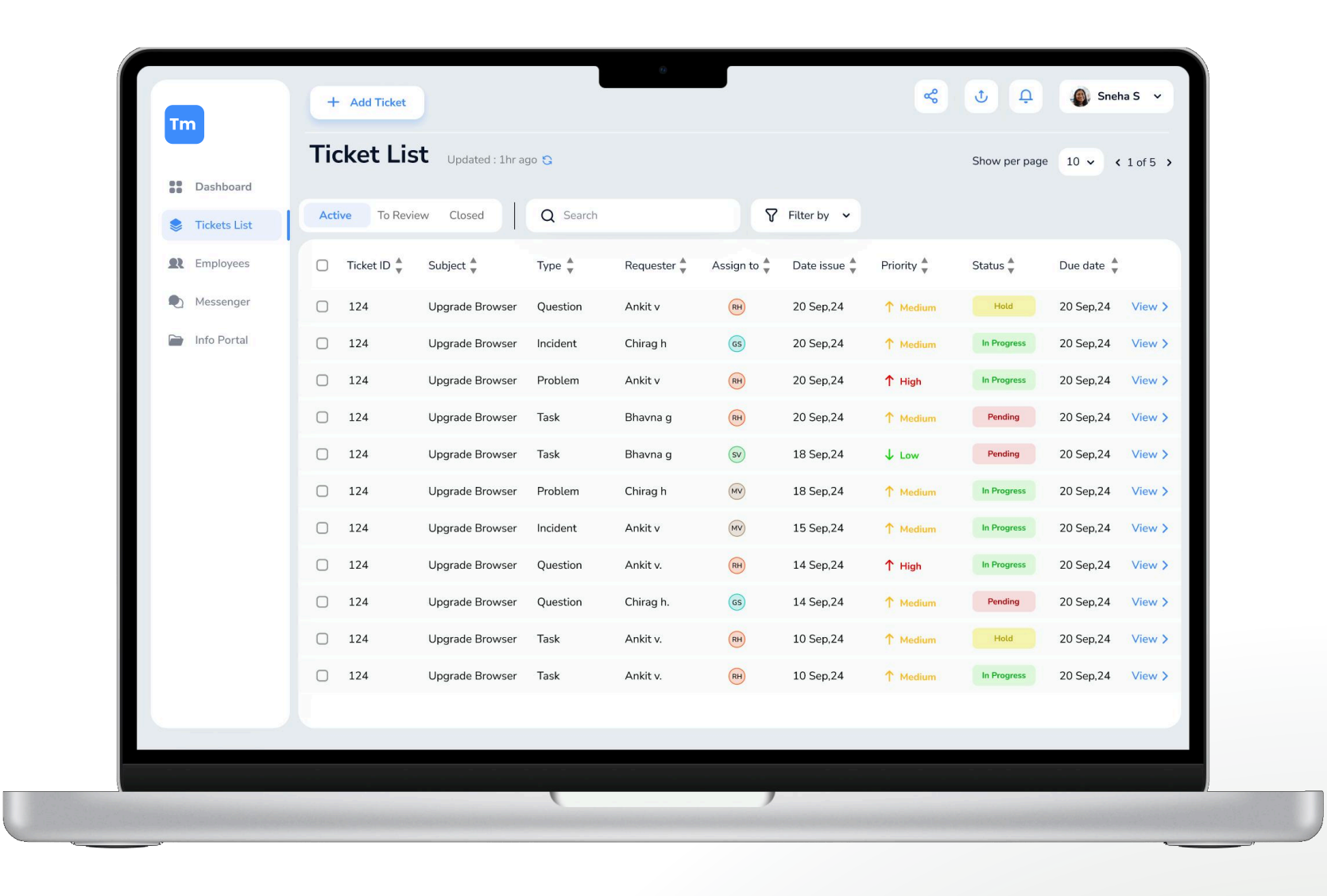

Overview
Show by : Type
345
Incident
Problem
Task
Questions
To Review
Ticket ID
Subject
Type
Priority
Assign to
Due date
345
Create ID
Task
Medium
25 Sep.24
View

- **Overview section** helps to counts the area of how many tickets are coming from different types, how many are coming the ticket priority and status.


Show by : Type
Type
Priority
Status

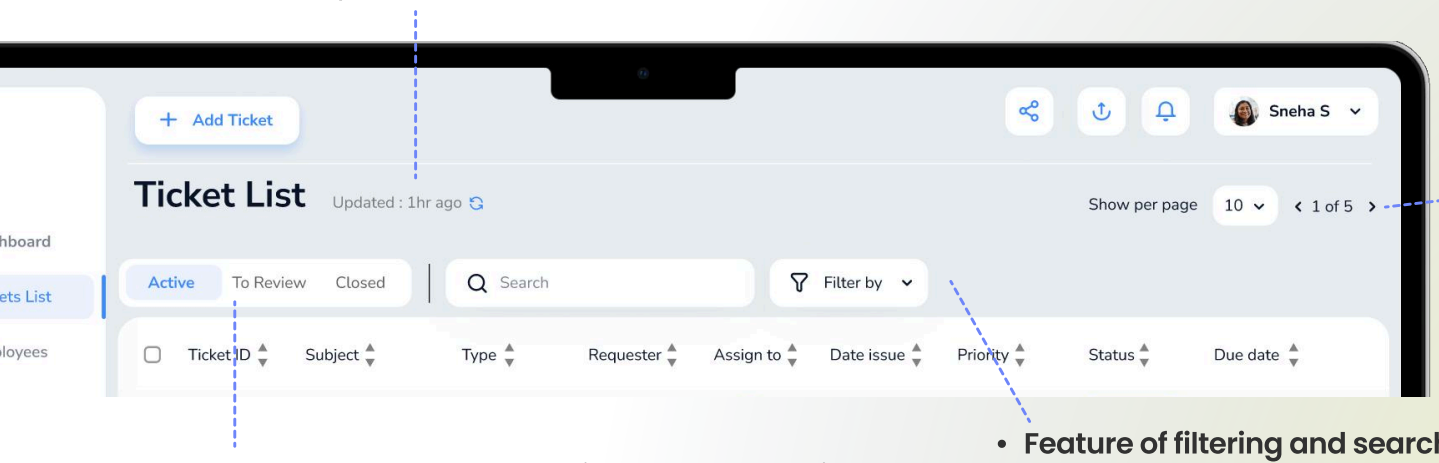
• Ticket list

- Used by leads, admin

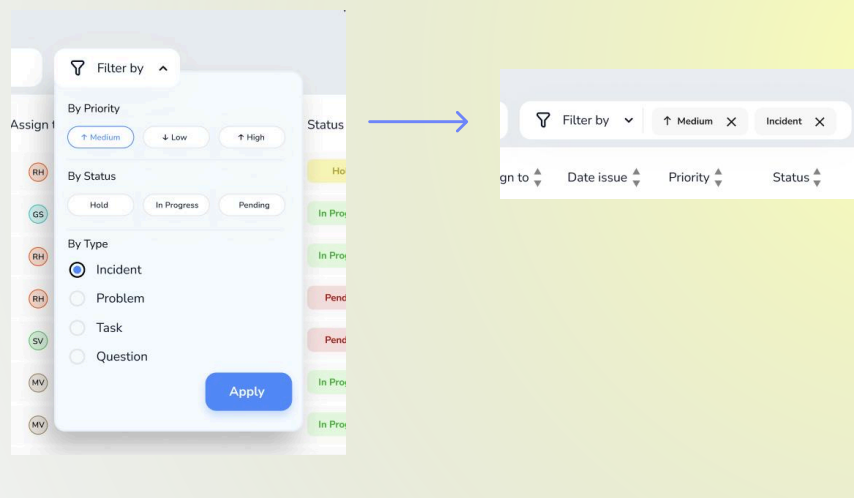

Ticket List
Updated : 1hr ago
Active
To Review
Closed
Search
Filter by
Show per page 10
1 of 5
Ticket ID
Subject
Type
Requester
Assign to
Date issue
Priority
Status
Due date

Details

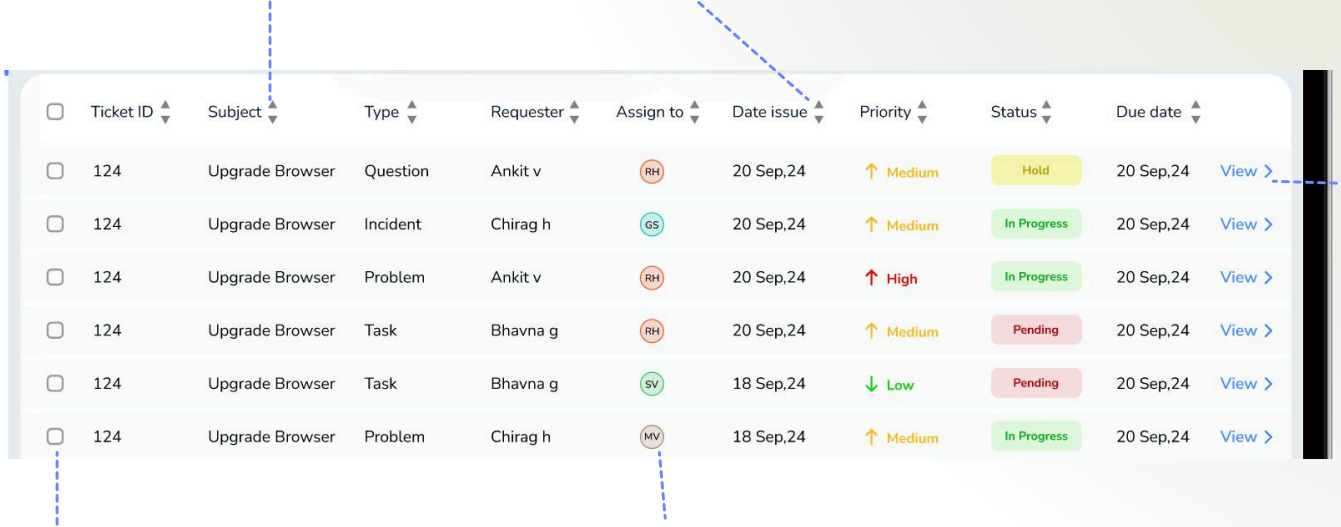
- **An Upadate info** for user to know when the that system is up to date and they can refresh by themself as well



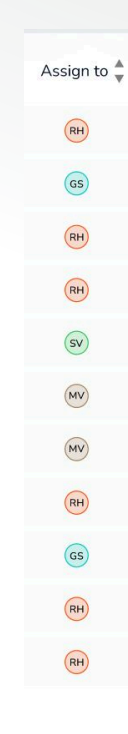
- Tab view for user to **easy switch between active, review and closed tickets.**
- Allowing user to **control number of ticket** they can focus at one page to **eliminate the clutter.**
- **Feature of filtering and search** to filter out according to what user want to see.
- when user use filter option they can see what filter is applied and can close as they want.

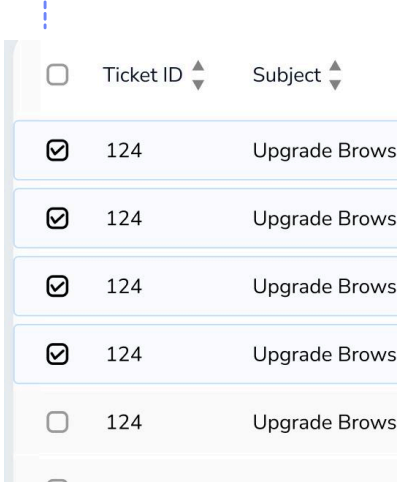

Filter by
By Priority
By Status
By Type
Incident
Problem
Task
Question
Apply
Medium
Incident

- Easy sorting to allow user to sort the list ascending or descending for alphabetical/date wise.



- **Avoiding accidental** click while scrolling by giving them specific CTA link to view details
- Using colour code in names for **helping user to visually understand like which agent is having more number of tickets**

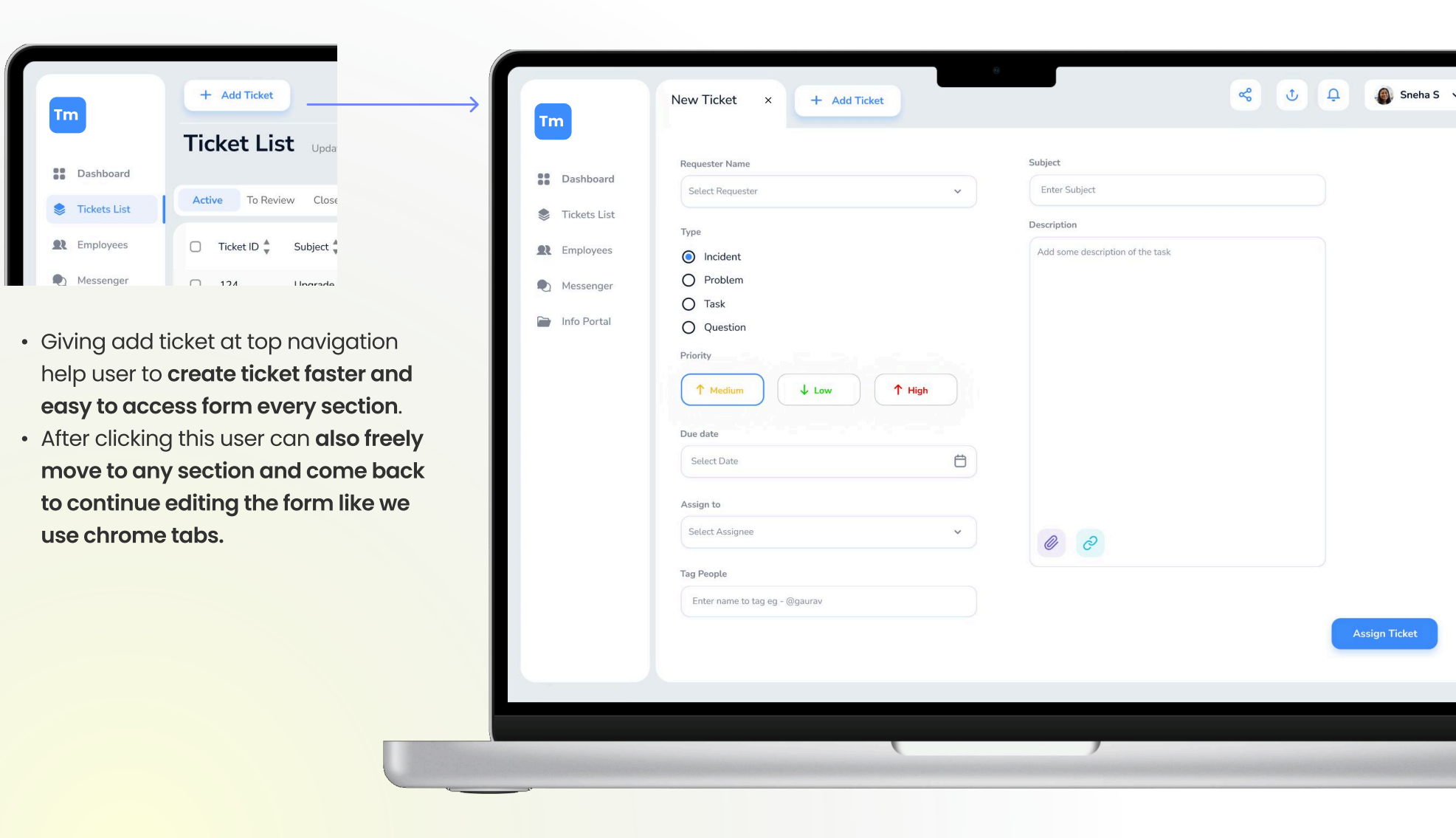



Ticket ID
Subject
124
Upgrade Brows

- User can easily select and export / share the tickets.

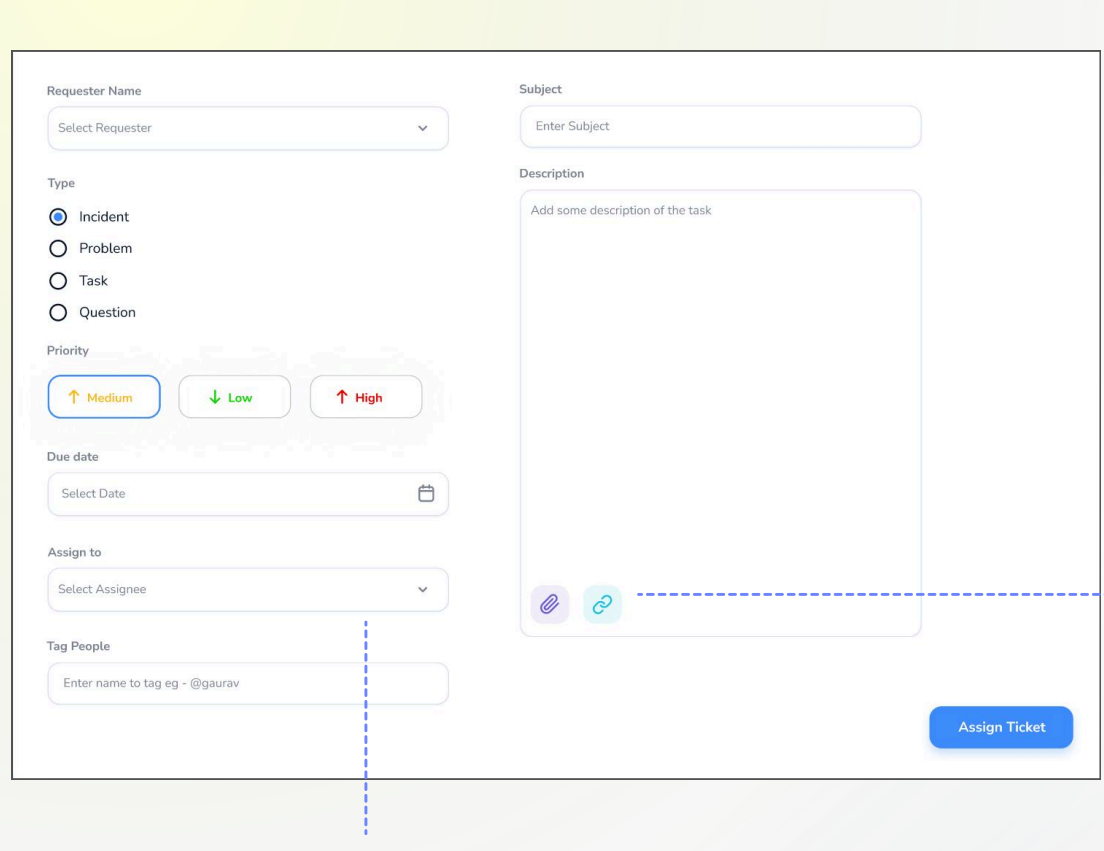
• Create new ticket

- Used by leads, admin and agents

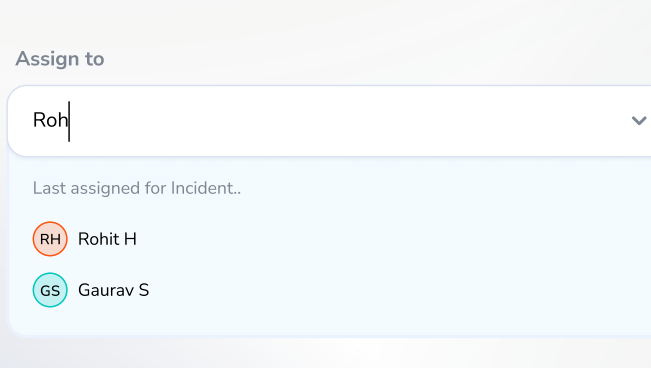

Ticket List
Add Ticket
New Ticket
Requester Name
Subject
Description
Type
Incident
Problem
Task
Question
Priority
Medium
Low
High
Due date
Assign to
Tag People
Assign Ticket

- Giving add ticket at top navigation help user to **create ticket faster and easy to access form every section.**
- After clicking this user can **also freely move to any section and come back to continue editing the form like we use chrome tabs.**

Details

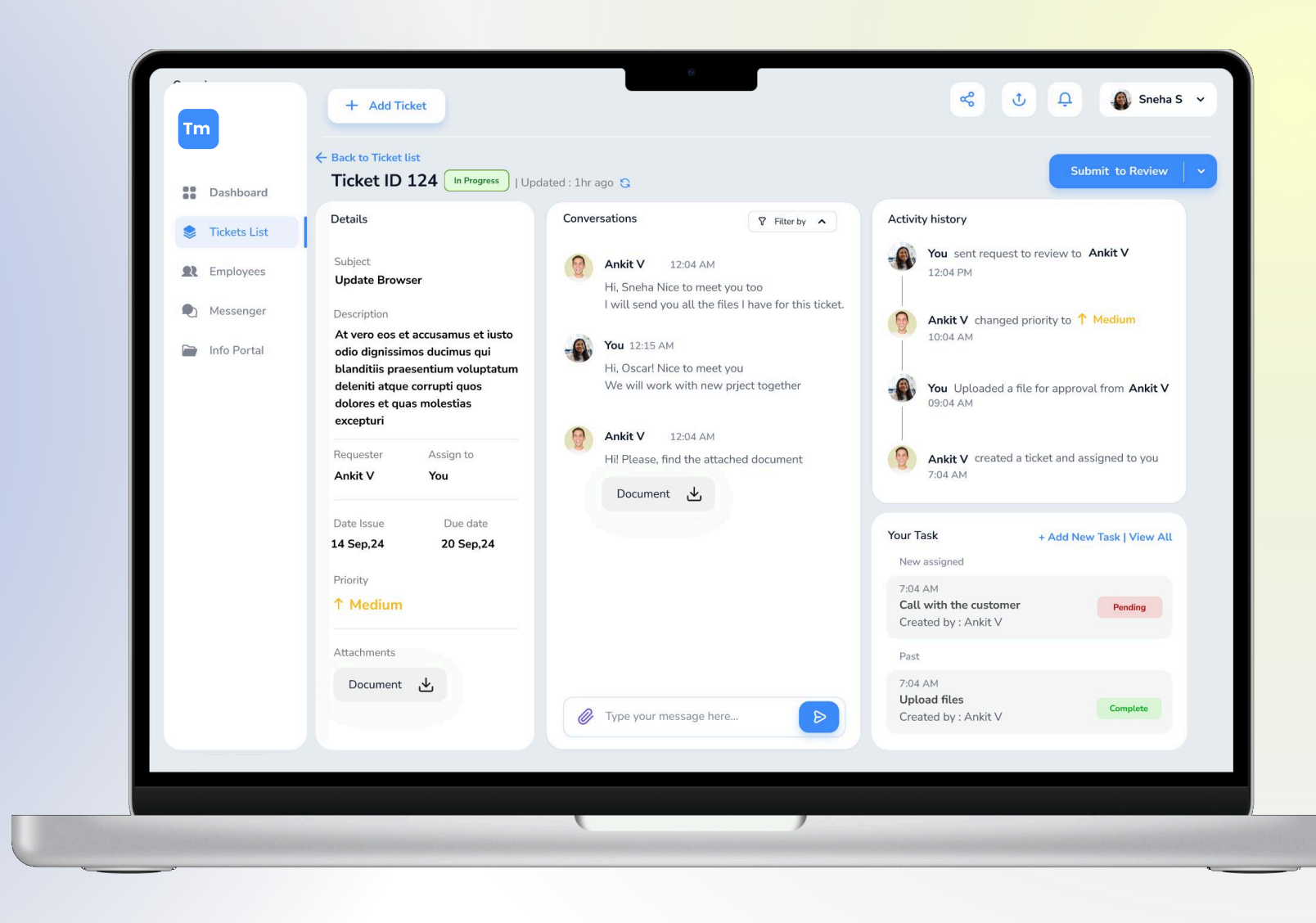


- Giving them clean and simple form fields fill and assign tickets.
- Using radio and selectable buttons can help to create faster than search.
- User can attached /link documents while assigning the tickets
- System will automatically shows which agent is last assigned for specific type of ticket to make decision faster

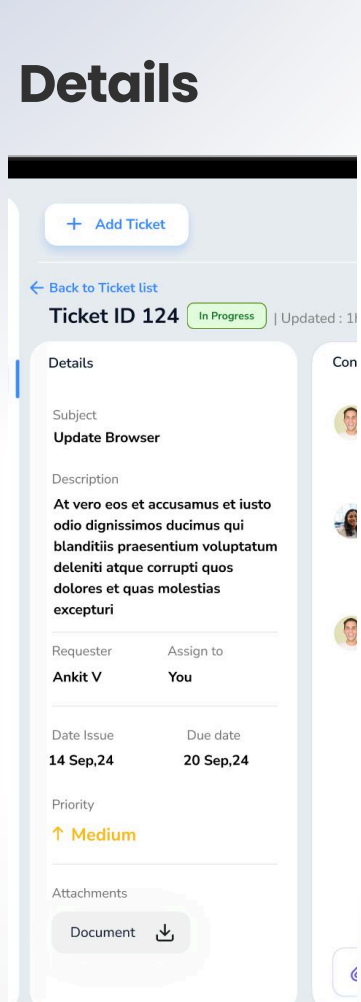

Assign to
Roh
Last assigned for Incident.
Rohit H
Gaurav S

• Ticket Detail

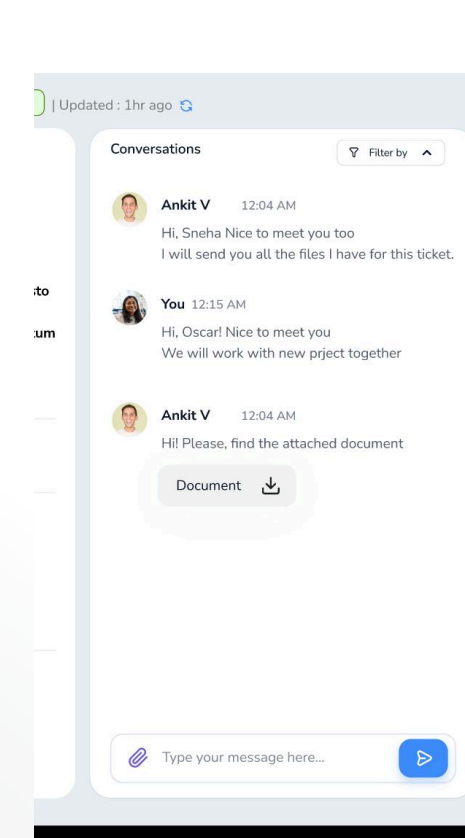
- Used by agents


Back to Ticket list
Ticket ID 124
In Progress
Submit to Review
Details
Conversations
Activity history
Your Task

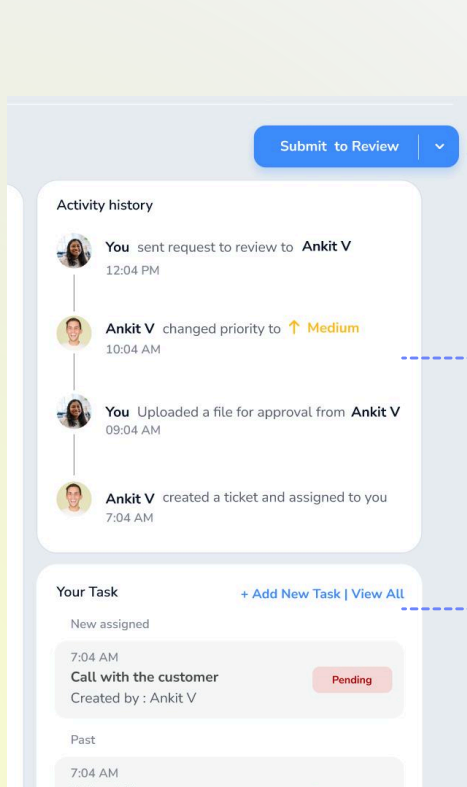
Details



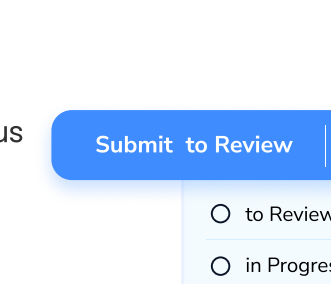
- Showing user basic details of the tickets.



- User can user conversation **section to discuss** with the lead about ticket.
- **Filter chat by documents and links.**
- Allowing user to view **comment threads of the ticket.**



- Help user to submit the ticket as per the status of the task.
- As submitting the status will changed as per the user input in the task list.


Submit to Review
to Review
in Progress
as Hold

- User can view the activity history.
- Track down and what activity is going on with all team members.
- User can view what task is being assigned and it will **automatically status shows completed** once the task is done.
- Can easily assign task and view history of all task from the link section.

Designed by **Ankit verma**

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Looking for new projects—if you have a UX challenge in mind, **let's connect!**

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Thank you for your time 😀