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INSTALL GUIDE · HELP DESK LEADS AND ADMINISTRATORS

Service Desk

Set up agents, queues and teams, turn a mailbox into tickets, find any ticket by words in its replies, and keep SLA targets fair by pausing them while a ticket waits on the requester.

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What you need

- The **Service Desk** module on your license (Settings > License and modules). It's priced per agent. Requesters are free.
- An administrator to set it up under **Settings > Service Desk**.
- For email to ticket only: a mailbox your mail server lets Uplivra read over IMAP (most do, including Microsoft 365 and Google Workspace with an app password), and an email server for sending (Settings > Email servers).

Everything below except agents and queues is **optional**. Turn on only what you need.

Agents and queues

Agents work tickets and use the licensed seats. Everyone else who signs in can open requests and follow their own. Admins can also work tickets.

Queues sort the work, such as IT Support, Network or Projects. The first queue is made for you.

Teams

A team is a group of agents, such as Network or Desktop support. Teams are optional.

1. Go to **Settings > Service Desk > Teams** and choose **Add a team**.

2. Give it a name, tick its members, and pick a **team lead** if you like. Members must be agents or admins.
3. Under **Queues**, open **Change** on a queue and pick the team that owns it.

What changes:

- A ticket in a team's queue **belongs to that team**. Moving a ticket to another team's queue moves it to that team. You can also pick a team (or no team) on the ticket itself.
- On the ticket, **Assigned to** shows each agent with their teams, so you can pick someone in the right team.
- Team members get a **My team** view on the Service Desk page with their teams' open tickets. Everyone can filter the list by team.
- **Round robin** (optional, per team): each new ticket in the team's queues goes to the next member in turn, and the ticket's history says so. Disabled accounts and people who are no longer agents are left out. Tickets someone assigned by hand are not changed.
- **Reports** can be shown for one team, and list tickets by team.

Email to ticket

Give a queue a mailbox, such as help@yourcompany.com, and Uplivra reads its new mail **every minute**.

1. Go to **Settings > Service Desk > Email to ticket** and open the queue.
2. Enter the **IMAP server** (for example outlook.office365.com or imap.gmail.com), how to connect (**TLS on port 993** is best), the **username** and **password**, and the **folder** (usually INBOX).
3. Enter **the mailbox's address**. Uplivra never opens tickets from it, and emails to requesters about this queue's tickets carry it as the reply address, so their replies come back to the ticket.
4. Tick **Email the sender that their ticket was opened** if you want an acknowledgement with the ticket number.
5. Choose **Save and test**. Uplivra signs in and opens the folder straight away, and tells you if something is wrong.

The password is **kept encrypted** with the server's key and is never shown again. Leave the password box empty to keep it when you change other settings.

What happens to each email:

The email	What Uplivra does
A new message	Opens a ticket in the queue. The sender is the requester (linked to their Uplivra account if they have one), the subject is the ticket's subject, the text is its description, and attachments are added (up to 10 MB each, 20 per message). If the queue has a team, the team gets it, and round robin applies.
A reply with the ticket number in the subject, like [#1042]	Adds the new part of the reply to that ticket (the quoted old message is left out). From the requester, it's a reply that restarts the ticket if it was waiting on them. From an agent, it's a public reply and the requester is told. From anyone else, such as someone copied in, it's an internal note the requester doesn't see.
A reply to a closed ticket	Opens a new ticket that says which ticket it follows.
An automatic message: out-of-office, auto-reply, bounce, mailing list or newsletter (the Auto-Submitted, Precedence: bulk or list, and List-Id headers), or mail from a no-reply, postmaster or mailer-daemon address	Ignored. To turn another system's alert emails into tickets, send them from an ordinary address without those headers, or use Uplivra's own alerts instead.
Mail from Uplivra's own addresses (the mailbox, your email servers' sender addresses)	Ignored, so Uplivra never answers itself.
More than 20 messages in an hour from one sender to one queue	The rest are ignored for that hour, so two robots can't fill your desk.

Uplivra marks the messages it has read as read and leaves them in the mailbox. If something goes wrong while saving a ticket, the message stays unread and is tried again the next minute. Each message is only ever turned into a ticket once.

The **Latest mail** list on the settings page shows the last messages and what happened to each. **Read new mail now** checks the mailbox straight away.

Ports: the Uplivra server connects out to your mail server on **TCP 993** (or 143 for STARTTLS). See [Ports](#). "No encryption" works but sends the password in the clear; use it only on a trusted network.

Searching

The search box on the Service Desk page finds tickets by number (`#1042`), by words in the subject, description and requester, and by words in **replies and internal notes**. Put words in quotes to find an exact phrase, like `"error 0x80070005"`.

Internal notes are only searched for agents. People who follow their own requests only ever find what they can see. The search box at the top of every page works the same way.

Pausing targets while you wait on the requester

When a ticket is set to **Waiting on requester**, its response and resolution clocks stop. This is on by default; you can turn it off under **Settings > Service Desk** (Pause the targets while a ticket is waiting on the requester).

- The ticket shows **SLA clock paused since** a time, and the list shows "clock paused" instead of a due time.
- When the requester replies (on the web, by email or from their link), or an agent changes the status, the clock starts again. The paused time (in working hours) is added to the ticket's **Time paused**, and its due times move later by the same amount. The history records each pause.
- A ticket can't miss its target while paused. Missed targets are worked out on the moved due times.
- Changing the priority sets new targets from when the ticket was opened, plus the time already paused.
- **Waiting on requester** on the Service Desk page lists every paused ticket.
- **Reports** show how many tickets are waiting now and the average time paused, and the average time to resolve **leaves out paused time**.

Reports

Service Desk › Reports shows tickets opened and resolved, targets met, average first reply, average time to resolve (without paused time), average time paused, and counts by priority, team, queue and category, for 7, 30 or 90 days. Pick a team to see just its tickets.