



Help Desk, Service Desk

Version: 1.2

Last Updated: 01/08/2026

Owner/Department: Operations

Effective Date: 12/31/2025

Next Review Date: 12/31/2026

Reviewed By: Carla Skuhrovec, Director of Operations

Purpose

The Meijer Care Team is responsible for providing timely, accurate, and customer-focused support for Meijer Voice Tickets as they pertain to the RingCentral product. This team manages incident intake, triage, troubleshooting, and coordination across departments to ensure issues are resolved as quickly as possible. The Meijer Care Team serves as the first point of contact for Meijer, capturing detailed information, assigning work to the correct resolver group, and maintaining clear communication throughout the lifecycle of each ticket.

Use Case

This helpdesk team supports Meijer with their requests for RingCentral support. All tickets assigned to this team must be tied to active projects, billable PS hours, or the existing Meijer T&M invoicing agreement.

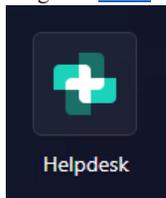
- MP Support – Troubleshooting, replacements, port moves
- Phone Support – Troubleshooting, programming and replacement
- Project based work requested by Meijer billed from Time & Materials.
- Paging Support – Meijer treats paging issues as a safety risk.

Systems, Tools & Templates

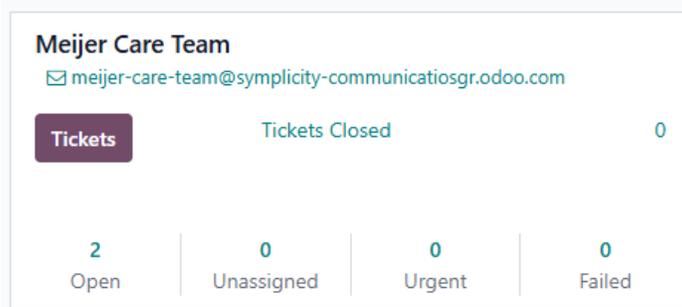
- Odo

Step-by-Step Procedure to Open Ticket

- **Step 1:** Login to [Odoo](#) and navigate to the Help Desk module.



- **Step 2:** Click on the Service Desk Helpdesk Team



- **Step 3:** Click on “New” to open a ticket.
- **Step 4:** Enter your ticket title which should reflect the ticket request.
- **Step 5:** Select your name from the **Assigned To** drop down
- **Step 6:** Select Meijer as the customer from the drop down menu. If the issue is site specific for a multi-site customer, ensure that you select that site. This may be easier from the **Search More** window and type in the site number.

Ticket Title

e.g. Product arrived damaged

Assigned to

Customer

meijer

- Frederik Meijer Gardens
- Meijer Credit Union
- Meijer Great Lakes Limited Partnership
- Meijer Great Lakes Limited Partnership 007 - Comstock Park
- Meijer Great Lakes Limited Partnership 019 - Muskegon
- Meijer Great Lakes Limited Partnership 020 - Grand Rapids
- Meijer Great Lakes Limited Partnership 021 - Kalamazoo
- Meijer Great Lakes Limited Partnership 022 - Portage
- Create "meijer"
- Create and edit...
- Search more...

Search: Customer

Quick search: meijer X 5

Name	Email
Frederik Meijer Gardens	
Meijer Credit Union	
Meijer Great Lakes Limited Partnership	
Meijer Great Lakes Limited Partnership, 007 - Comstock Park	
Meijer Great Lakes Limited Partnership, 019 - Muskegon	
Meijer Great Lakes Limited Partnership, 019 - Muskegon	
Meijer Great Lakes Limited Partnership, 021 - Kalamazoo	
Meijer Great Lakes Limited Partnership, 022 - Portage	
Meijer Great Lakes Limited Partnership, 023 - Lansing	
Meijer Great Lakes Limited Partnership, 025 - Okemos	
Meijer Great Lakes Limited Partnership, 026 - Jenison	
Meijer Great Lakes Limited Partnership, 027 - Ypsilanti	
Meijer Great Lakes Limited Partnership, 029 - Burton	
Meijer Great Lakes Limited Partnership, 030 - Jackson	
Meijer Great Lakes Limited Partnership, 032 - Canton	
Meijer Great Lakes Limited Partnership, 033 - Traverse City	
Meijer Great Lakes Limited Partnership, 0334 - Austintown	

New Close

- **Step 7: Select Add.** Click on the ticket (in new stage) to expand and add additional details.

This is a test ticket

Move, Add, Change?

Helpdesk Team Service Desk

Assigned to  Jessica Reilly

Priority

Tags

Customer Meijer Great Lakes Limited Partnership, 007 - Comstock Park

Phone

Ticket Type

Sales Order Item? Non-billable

Description Timesheets Extra Info

Add details about this ticket...

-
- **Step 8:** Chose ticket type from following options
 - **Options:**
 - Incident – Outage
 - Incident – Degraded
 - Incident – Performance Issue
 - Service Request – Add/Change/Move
 - Service Request – User/Feature
 - Inquiry – How-To/Question
 - Alert/Monitoring Event
 - Meijer – Time & Material
- **Step 9:** Add Request Type from Tags
 - **Phone Replacement**
 - **MP Replacement**
 - **Porting**
- **Step 10:** An SLA will be assigned based on Tag/Priority/Customer
 - A **Paging** Tag with a High Priority will Trigger an 18 working hour SLA to closure as Meijer treats Paging as a Safety concern.
 - A **Care** Tag will create a 4 hour response time SLA to moving from New to In Progress

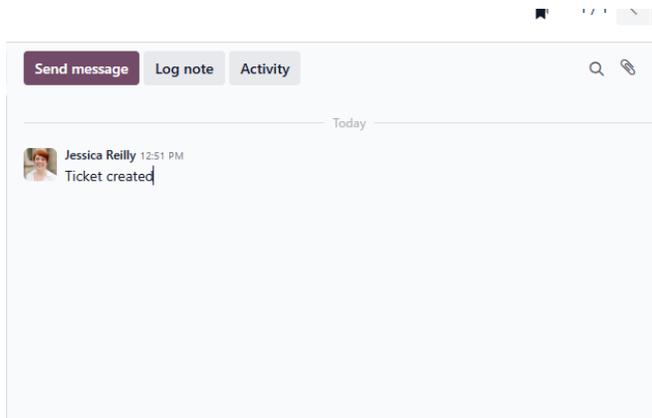
-
- **Step 11:** In the **description** provide a comprehensive description of the issue and POC

Description Timesheets Extra Info

Description: Meijer requested the Team Member Lines be ported to RingCentral. Original port issues 9/4/25 however, not all of the lines ported over. Now that moratorium is over are proceeding with submitting the port for the remaining lines.
POC: Dick Thompssett

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- **Step 12:** Use the **Log Note** Button on the right to document your progress on the ticket, and the **Activity** Button to schedule Activity/Tasks as you work your ticket.

Commented [CS1]: @Jessica Let's define this with a screenshot. I don't want it ending up in chatter

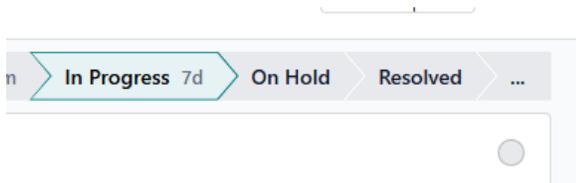


- **Step 12:** Use the Progress Bar to move your ticket to **In Progress**



This is a test ticket

- **Step 13:** Update the Ticket Status in the bubble under the progress bar
 - Ready = it is complete and ready to be worked
 - In progress = actively being worked
 - Blocked = not moving due to an internal or external blocker



- **Step 13:** Use the **Start** Button to Log your time as you work the ticket. This will create a line in the **Timesheets** tab. Update the description to reflect the work you complete. Select the **Stop** button when you move on to a task not-related. All touches when working the ticket need to be accurately logged in timesheets. Escalate any requests for manual time updates to the Director of Ops.
-

Stop Request Field Tech Send to Sales 00:00:03 New 12m In Progress 1m Closed On Hold ...

This is a test ticket

Move, Add, Change?

Helpdesk Team Service Desk

Assigned to Jessica Reilly

Priority ☆☆☆

Tags

Customer Meijer Great Lakes Limited Partnership, 007 - Comstock Park

Phone

Ticket Type

Sales Order Item ? Non-billable

Description Timesheets Extra Info

Date	Employee	Description	Time Spent
Dec 31	Jessica Reilly	/	00:00
Add a line			
Time Spent: 00:00			

Step 14: Ticket Closure

- Once the issue has been resolved, add into the Description Tab separate line items for **Closure Date** and **Resolution** and move the ticket to **Resolved** Stage on the Progress Bar.
- RCA – Process TBD

Exceptions & Escalations

- Escalation path if something deviates from the SOP:
 - Director of Operations

Related Policies or SOPs

- [SOP Odoo - Help Desk - Technical Delivery Pre-Sales Team](#)
- [SOP Odoo - Help Desk - Service Desk](#)
- [SOP Odoo - Help Desk - Billing & Credit Support](#)

Version Control

Version	Date	Author	Summary of Changes
1.0	12/31/2025	Jessica Reilly	Initial creation
1.1	01/07/2026	Carla Skuhrovec	Redline & redaction review
1.2	01/08/2026	Jessica Reilly	Adjustments on redlines and configuration adjustments