

Help Desk Ultimate 3

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Having hard time finding an answer to your question?

Check out our Knowledge Base.

Extension page: <http://ecommerce.aheadworks.com/magento-extensions/help-desk-ultimate.html>

As many as 78% of customers cite "Customer Support" as the # 1 factor when choosing a merchant or a provider on the internet. That's what we found out in our recent study on factors influencing consumers' online buying behaviour. An efficient customer support, case tracking and resolution system is indispensable for a successful e-commerce business.

The Help Desk Ultimate Magento extension, developed after taking on board the lessons we've learned on online shopper behavior, is the perfect customer care and support solution for your Magento-based e-commerce site.

Installation

1. Backup your web directory and store database.

Click to view details

You can make backup copies with any tool you find appropriate

If you are going to use the native Magento backup function, navigate to **System -> Tools -> Backups** and perform **System** and **Database** backups

2. Log in to the Magento backend

3. Disable compilation

Click to view details

Navigate to **System -> Tools -> Compilation**.

If Compiler status is Disabled, you can skip to the next step

If Compiler is enabled, disable it.

The screenshot shows the 'Compilation' settings page. At the top right, there are two buttons: 'Disable' (highlighted with a green box) and 'Run Compilation Process'. Below the header, the 'Compilation State' section contains a table with the following data:

Compiler Status	Enabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

IMPORTANT: after the extension is installed, you can enable the compilation again; **IT IS CRUCIAL** that you use **"Run Compilation Process"** function, not just "Enable button"

The screenshot shows the 'Compilation' settings page. At the top right, there are two buttons: 'Enable' (highlighted with a green box) and 'Run Compilation Process'. Below the header, the 'Compilation State' section contains a table with the following data:

Compiler Status	Disabled
Compilation State	Compiled
Collected Files Count	7505
Compiled Scopes Count	4

Installing an extension with the Compilation enabled will result in store downtime.

4. Flush store cache

Click to view details

You can flush the store cache in 2 ways:

- **via the backend:**

Navigate to **System -> Cache Management** menu, and click **Flush Magento Cache** button

The screenshot shows the 'Cache Storage Management' page. At the top right, there are two buttons: 'Flush Magento Cache' (highlighted with a green box) and 'Flush Cache Storage'. Below the header, there is a table with the following data:

Cache Type	Description	Associated Tags	Status
<input type="checkbox"/> Configuration	System(config.xml, local.xml) and modules configuration files(config.xml).	CONFIG	ENABLED
<input type="checkbox"/> Layouts	Layout building instructions.	LAYOUT_GENERAL_CACHE_TAG	ENABLED
<input type="checkbox"/> Blocks HTML output	Page blocks HTML.	BLOCK_HTML	ENABLED

- **via filesystem:**

On your server, navigate to Magento root folder, then proceed to **/var/cache/**; delete all the content there.

5. Download the extension package from your account and extract the downloaded archive

6. Copy the content of **/Step_1/** folder to your store's root directory

If you are using a custom theme,
read the instructions here.

In case you are using a custom theme, it is recommended to copy the design files to your current theme's folders. In case there are several themes in use at the same store, the design files must be copied to each of them.

- Find this folder in the package: `/step_1/app/design/frontend/base/default/` ; copy its content to `/app/design/frontend/[your_package]/[your_theme]/`
- Find this folder in the package: `/step_1/skin/frontend/base/default/` ; copy its content to `/skin/frontend/[your_package]/[your_theme]/`

7. Copy the content of `/Step_2/` folder to your store's root directory

8. Flush store cache again; log out from the backend and log in again.

Set up cron

The Help Desk Ultimate extension uses cron for message processing. Read the following instructions on setting cron job for your Magento store: [Magento user guide](#). If you have already configured cron jobs for your Magento installation then you can skip this step.

Generally it would be enough to run in SSH console of your server:

```
crontab -e
```

And add the following line:

```
*/3 * * * * wget -O - -q 'http://your-store/cron.php'
```

Don't forget to confirm saving request when exit.

The *recommended* Cron execution frequency is 3-5 minutes.

Once cronjob is set up and running, the extension will be saving every action in the log, which can be viewed in **System->Configuration->aheadWorks Extensions->Info->aheadWorks Extensions logging->View log**. If you think that the extension does not work as expected, it is recommended to check the log first. If it is empty or contains very few records, it may indicate that your cronjob is not set or set improperly. Normally, every cron launch should add 1 or more entries. Actual quantity of the entries depends on the number of processed events per given cronjob.

Migration from HDU 2.10.11

The 3.x branch of the Help Desk Ultimate extension has been completely reworked, it has deep structural, coding and workflow differences from its predecessor. Therefore, the new version will not have access to the data of the older versions immediately after the installation.

To import the data into the HDU 3 extension, we have prepared a special migration script. See details on how to use it below.

The migration script can only transfer the data from **2.10.11 version** to 3.x branch. If you are using an older version, you will need to **update to 2.10.11 first**, then install the 3.x version and execute the script.

How to use the migration script?

- Make sure to backup your DB before starting the migration
- Make sure that there is no tickets-related activity (updates, etc) while the migration is performed. If a ticket gets updated during the migration, the latest changes may be lost. Disable all the active gateways through the original module's backend menu
You may also want to disable the original module in **System-> Configuration-> Advanced->**

Disable Modules Output tab, to prevent ticket updates. DO NOT disable the original module via .xml config file.

The sequence of actions required for a successful migration is as follows:

1. Install the Help Desk Ultimate 3 extension as per instructions above
2. Make sure the extension is **disabled** via its General Settings (**System-> Configuration-> aheadWorks Extensions-> Help Desk Ultimate 3-> General Settings-> Enable Module** set to "No")
3. Execute the migration script either manually (from the browser address bar), or via cron:

`your_store.com/shell/helpdesk3_update.php`

To avoid excessive server load, deliberate execution limitations were introduced into the script. It processes limited number of entities per execution:

100 tickets (initial ticket messages + ticket details)

100 messages

100 emails

Thus, if there are more records of the above types at your store currently, you will need to run the script multiple times

For the remaining entities (Departments, Templates, etc) are processed without any limitations, i.e., these records should normally be passed in their entirety during the 1st script run

4. The migration script writes the output log file, which indicates the progress: **var/aw_hdu_migration.log**
The content of this file looks like this:

```
(2) from (2) department(s) has been replaced
(0) from (0) status(es) has been replaced
(3) from (3) pattern(s) has been replaced
(0) from (0) template(s) has been replaced
(46) from (46) mail(s) has been replaced
(7) from (7) message(s) has been replaced
```

5. The migration can be considered complete if all the log records indicate full processing (*(X) from (X) has been replaced*), or if manual script run returns *"Already completed!"* message

For advanced users

Depending on your server capabilities, you may want to adjust the processing limits. To do, you can edit the following file:

`/app/code/local/AW/Helpdesk3/Model/Shell/Migration.php`

The target parameters are:

```
REPLACE_MAILBOX_LIMIT
REPLACE_TICKET_LIMIT
REPLACE_MESSAGE_LIMIT
```

6. Once migration complete - from the Magento root folder at your FTP proceed to: **/app/etc/modules/**

Open the file **AW_Helpdeskultimate.xml** and change the following line:

```
<active>true</active>
```

to

```
<active>>false</active>
```

Please verify email templates after migration, as templates of the previous versions will be removed.

Configuration

General Settings

The extension's general parameters can be configured in **System -> Configuration -> aheadWorks Extensions -> Help Desk** (or, **Help Desk -> Settings**) backend page.

General Settings tab:

- **Enable Module** - activates the extension

You must select a Primary department (see option below) in order to be able to activate the extension.

- **Primary Department** - this option allows selecting the Primary Department, which will be default for new tickets if the manual departments selection is disabled for customers.
- **Ticket auto-expiration, days** - sets the time period before a "Waiting For Customer" ticket is automatically closed. (see more info about the ticket statuses [here](#))
- **Gateways: Create new tickets from incoming emails** - enables / disables parsing incoming emails into tickets (more info on gateways functionality [here](#))
- **Hide "Customer Orders" from Agents** - hides the [Latest Orders](#) section from the specified users in the Ticket View screen. The available modes are:
 - **Hide from all Agents**
 - **Hide from all Agents except Primary Agents**
 - **Don't hide**
- **Send carbon copy to** - sends a copy of every ticket update to the specified email(s)
- **Display these columns in tickets grid** - this multi-select field allows customizing the content of View Tickets grid by including/excluding certain columns
- **Enable Ticket Rating** - this option allows your customers to rate tickets. Customers can rate from email or Customer Account page during 15 days after last change of the ticket status
- **Enable Product Questions Integration** - enables/disables integration with [Product Questions 2](#) extension.

How does [Product Questions 2](#) integration work?

If the integration is enabled, the new questions asked via the PQ frontend form will be parsed to tickets. The subject of such a ticket will clearly indicate that it was generated from a Product

General Settings

Enabled Module	Yes	[GLOBAL]
Primary Department	Sales	[STORE VIEW]
▲ Applicable if department selector on frontend is disabled, all new tickets are assigned to this department automatically. Also this department will be set when admin creates ticket from order page.		
Ticket auto-expiration, days	15	[STORE VIEW]
▲ If a "Waiting for Customer" ticket is not updated for X days, it will be automatically closed. Leave empty or 0 to disable.		
Gateways: Create new tickets from incoming emails	No	[GLOBAL]
Hide "Customer Orders" from Agents	Don't hide	[GLOBAL]
Send carbon copy to		[STORE VIEW]
▲ All emails will also be sent to this email address. Use comma-separated values to specify several emails		
Display these columns in tickets grid	ID, Last Message, Department, Help Desk Agent, Title, Order #, Customer, Priority, Store View, Messages	[GLOBAL]
▲ If no options are selected, all columns will be displayed		
Enable Ticket Rating	Yes	[STORE VIEW]
Enable Product Questions Integration	No	[STORE VIEW]
▲ When a customer submits an inquiry through the Product Question form, a HDU ticket gets created. Integration with Product Questions v2.0.0+		

Question, and the Content area will contain links to the product (both frontend and backend ones).

Frontend tab:

- **Show these fields when customer creates ticket** - defines whether Department Selector, Priority Selector and Order Selector fields will be displayed on "Submit Ticket" form
- **Allow customer to attach files** - allows / prohibits attaching files to messages. This option works for web-form ticket submissions; the email attachments are controlled in the Gateway settings
- **Max Upload File Size (Mb)** - restricts the maximum attachment size
- **Allow file extensions** - restricts the file extensions that are allowed for attaching. Use commas to list multiple extensions
- **Enable Contact Form integration** - enables submitting tickets through the native Contact form. If this option is enabled, any message posted through the contact form will be parsed to a ticket; otherwise, the form submissions will be processed per standard Magento scenario;
- **Disable standard contact form emails** - disables native Magento contact form notification emails and uses the Help Desk Ultimate's ones instead;
- **Allow external view for tickets** - enables/disables external view option

What Is "External URL"?

External View Link is a long encrypted URL which allows to access the ticket thread without being logged in to a store account. This link is crucial in case you allow guest submissions, but do not use the Email Gateway functionality.

- **Show selected entities to customer on ticket page** - shows or hides the correspondent attributes from the ticket thread.

Ticket Escalation tab:

- **Allow ticket escalation** - enables / disables the Escalate functionality
- **Supervisor email(s)** - the email address (-es) the escalate messages will be sent to
- **Email Template to supervisor** - the email template that will be used for escalation notices.

How does it work?

The escalation option may be useful for ensuring the high quality of customer service.

If this functionality is allowed, a customer can send a complaint or comment regarding an open ticket directly to store supervisors,

bypassing the current department and agent.

If the Escalate option is invoked, a customer will have an option to submit the special message, which will be sent to the email(s) specified in the extension configuration.

Managing Departments

The extension allows creating unlimited number of Departments. You can view the existent ones and create new through **Help Desk -> Departments** backend grid.

Here's how the department setup looks like.

General tab allows specifying basic department parameters:

- **Status** - Enabled / Disabled
- **Visible on** (select Storeview(s)) - this selector allows choosing on what storeviews the department will be selectable in the forms

This option defines frontend visibility status only. Any active department can still be assigned tickets to even if it is invisible for the ticket's original storeview.

- **Title** - defines the Department name both for frontend and backend usage
- **Sort Order** - define list position of the Department

Notification Settings tab:

To learn more about the extension's email templates, check [this section](#)

Through this tab, you can define the **Sender** of the extension's email notifications, and select the template for each of the listed notification types. The following events can trigger notifications:

Event	Triggered By	Sent to
New Ticket	Customer	Support (Department Primary Agent)
		Customer
	Support	Customer
New reply	Customer	Support (Currently Assigned Agent)
	Support	Customer
Ticket re-assignment	Support	Department Primary Agent

		New Assignee
Ticket re-assignment or status update	Support	Customer

To disable a given notification type, just set "**Do not send**" in the template selector.

Help Desk Agents tab:

Here, you can select Agents (i.e., **Admin Users**) associated with the department. You are also to select the **Primary User**.

Note, while a department can have any number of associated Agents, there can be only one Primary User per department.

The Agent names are taken from the backend user account, and can be specified in **System - > Permissions -> Users**

Email Gateway tab:

The Help Desk Ultimate extension allows submitting tickets via email, this functionality is implemented via the support of Email Gateways. A gateway is a dedicated mailbox, which is meant to be used by the extension *exclusively*. The module will consider every message that goes through that mailbox either a ticket reply or a new ticket. A separate gateway can be created for each of the departments.

By default, the Gateway functionality for a department is disabled. Once you set **Enable Email Gateway** option to "**Yes**", the mailbox configuration options will get displayed.

To set up a gateway, you should specify the below values:

- **Title**
- **Protocol** (IMAP / POP3)
- **Gateway Email**
- **Gateway Host**
- **Login** and **Password**
- **Port** - make sure that the specified port is opened in your server's firewall settings, otherwise, the extension will be unable to connect to the gateway
- **Use SSL / TLS**
- **Delete Emails From Host** - this option defines whether an email will be removed from the gateway mailbox after it gets parsed to ticket
- **Allow file attachments** - enables / disables accepting attached files.

Use **Test Connection** button to quick-check if settings are correct.

When setting up a gateway, make sure that the selected mailbox does not have any messages in the **Inbox** folder.

If the **Inbox** folder is not empty, move its entire content to a different folder.

Admin Permissions tab:

Through this tab, you can set the access restrictions for the tickets assigned to the department.

- **Allowed for Departments** selector - here , you can select the existent department(s); all the Agents associated with the selected departments will have access to the department tickets.



The selector will not contain the currently set-up department; it lists other departments present in the system.

- **Allowed for Roles** selector - allows defining what Admin Role Scope (s) are allowed access to the department tickets.

Make sure to select at least one department or admin role here. By default, all the entries are de-selected, if the department is saved without any role scopes marked, the tickets assigned to this department will not be accessible from the backend.

Managing Tickets

The tickets can be viewed and managed through **Help Desk -> View Tickets** backend grid. Here is how this grid looks like:

Tickets - Help Desk Add Ticket

Choose Store View: All Store Views Search for Ticket

Page 1 of 1 pages | View 20 per page | Total 5 records found Export to: CSV Export Reset Filter Search

ID	Last Message	Department	Help Desk Agent	Subject	Order #	Customer	Priority	Store View	Messages	Status	Rate	Lock	Created	Action
GJN-35582	Feb 11, 2015 11:08:36 AM	Sales	Jim Cocker	Delivery problem	10000013	James Stevenson	URGENT	All Store Views	4	Open	4	Locked	Feb 11, 2015 10:47:32 AM	Manage
NRD-55262	Feb 11, 2015 10:55:07 AM	Sales	Jonh Doe	Can you give me discount		Amanda Robinson	To Do	All Store Views	1	Closed	5	Unlocked	Feb 11, 2015 10:55:07 AM	Manage
AOH-96613	Feb 11, 2015 10:55:07 AM	Sales	Tom Sawyer	Size question		Jill	ASAP	All Store Views	1	Open		Unlocked	Feb 11, 2015 10:55:07 AM	Manage
DDW-72838	Feb 11, 2015 10:55:06 AM	Repairs	Admin	Contact form Dan <dan@example.com>		Dan	To Do	All Store Views	1	Waiting for customer		Unlocked	Feb 11, 2015 10:55:06 AM	Manage
GYK-93446	Feb 11, 2015 10:55:06 AM	Returns	Admin	Damaged package	10000019	Stan Gibs	If Time	All Store Views	1	Open		Unlocked	Feb 11, 2015 10:55:06 AM	Manage

This grid can be sorted / filtered by any of the columns. Pay attention to the following options available from the grid.

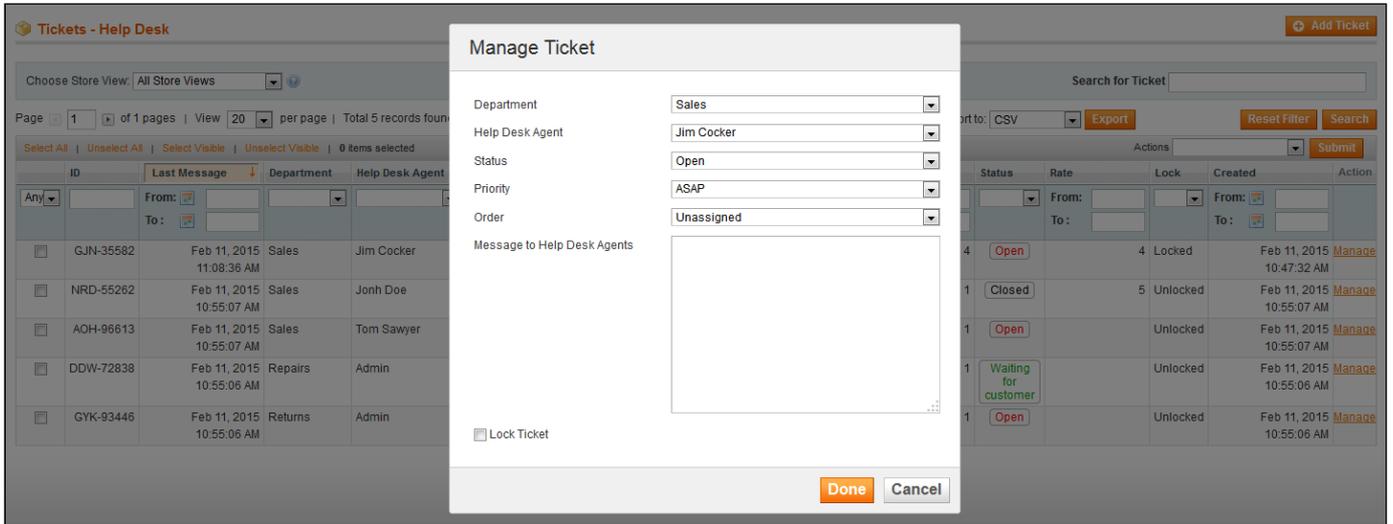
- **Export** - the extension allows exporting the grid in its current state (i.e., with filtering and sorting applied) to a .csv or .xml file.
- **Search** - the extension can search the Subject of the ticket and its full content for the query words.

Note: the search "stacks" with the currently applied filtering. E.g., if you filter the grid by an Agent and run search, the latter will be conducted among the tickets currently assigned to the selected

agent only.

- **Actions** - mass actions are supported. Here's the list of Actions you can apply from this grid:
 - **Assign to Department**
 - **Assign to Agent** (Note: if the new assignee belongs to a different department, the dept assignment will be automatically updated as well)
 - **Change Status**
 - **Change Priority**
 - **Delete**

- **Action** - manage ticket in the popup window



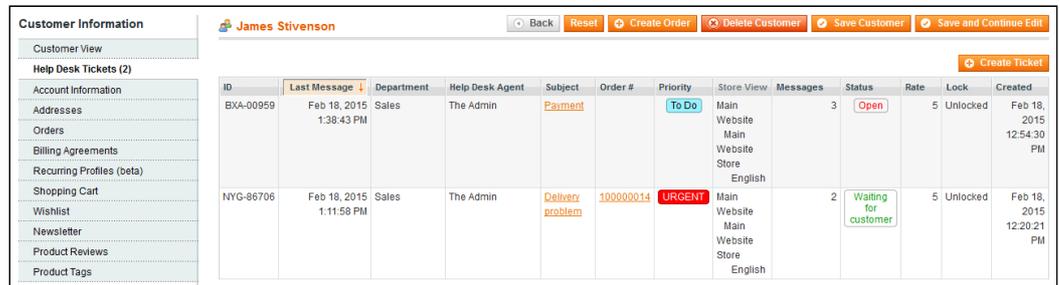
Creating new tickets

The extension allows creating tickets from the backend. There are several areas a new ticket can be created from.

- From the **View Tickets** grid via the **Add Ticket** button
- From the **Customer Account** details page via the **Create Ticket** button
- From the **Order View** page via the **Create Ticket** button

View details

The extension adds a special tab into the backend customer account, where all customer's tickets are listed. New ones can be created from this tab as well.



- From **Order Details** page

View details

New tickets can be created via the **Comments** section in backend Order View page.

Comments History

Add Order Comments

Status

Comment

Notify Customer by Email
 Visible on Frontend

Or at the Help Desk Tickets tab where the quantity of tickets is displayed within the brackets.

Order View Order # 100000014 | Feb 18, 2015 12:18:50 PM

ID	Last Message	Department	Help Desk Agent	Subject	Priority	Store View	Messages	Status	Rate	Lock	Created
NYC-86706	Feb 18, 2015 1:11:58 PM	Sales	The Admin	Delivery problem	JURGENT	Main Website Main Website Store English	2	Waiting for customer	5	Unlocked	Feb 18, 2015 12:20:21 PM

Ticket Attributes

A ticket has a number of basic properties and parameters:

- **Ticket ID** - is assigned to a ticket automatically on submission. Has a format like "ABC-12345". The ID serves a number of crucial purposes, the main one is properly associating email ticket updates with the ticket thread. Ticket ID MUST be kept in the subject line if a ticket is replied to directly via email.
- **Status** - the parameter introduced to ease managing the workflow. Technically, all statuses except "Closed" (including the Custom Statuses you might have created) are identical, and can be used for filtering the View Tickets grid. Status "Closed" prohibits further updates from the customer side - the ticket thread can still be viewed, but submitting any new messages to that particular ticket is disabled. *NOTE: a "Closed" ticket can still be re-opened by the store admin.*
- **Priority** - the parameter introduced to ease managing the workflow. Has 4 default values, can be used for filtering the View Tickets grid.

Customization

Custom values are supported for both Status and Priority. Custom Status(es) and Priority (-ies) can be created and managed through **Help Desk -> Customization** backend menu entry (**Statuses** and **Priorities** shortcuts respectively.)

How do I customize them?

While setting up a Status and a Priority values, the identical set of options is available:

- **Status** - enabled / disabled

- **Font and Background Color** - these options allow adjusting the entry appearance

The **Manage Titles** section below allows specifying text labels for each of the storeviews.

General Details				
Status	Enabled			
Font Color	FFFFFF			
Background Color	FF0000			
Manage Titles				
Admin	English	French	storeview2	webs
URGENT				

NOTE: Both Status and Priority attributes have 4 default values. These values can be customized, but CANNOT BE deleted or inactivated.

- **Department and Agent** assignment - one of the key ticket parameters. All the notifications and replies will be sent to / from the department the ticket is currently assigned to. If frontend department selector is enabled, a customer will have an option to choose the desired department during the ticket submission. After the ticket is created, department assignment can be changed by admin users ONLY.
- **Ticket Lock** (yes / no) - this function restricts updating a ticket to the current Agent. If Ticket Lock is on, only the current Agent can respond to, and change other parameters (Priority, Status, etc) of a given ticket.
- **Customer** Assignment - one of the key ticket parameters. Defined automatically for logged in users, must be manually specified by guests. *NOTE: if a registered user submits a ticket as a guest, but specifies their account email address, it is possible to link the ticket to their account.*
- **Order** Assignment (optional) - links a ticket to an order; using this function allows opening the order screen directly from the Edit Ticket screen, and, lists the ticket in the Help Desk tab in the View Order page.

Removing entities

Since version 3.1.0 , the extension allows removing (disabling / deleting) certain entities. Doing so does not affect the ticket history - if any of the removed entities was associated with a given ticket, it will still be displayed in the ticket thread.

Restrictions

There are certain restrictions for removing the entities:

Entity	The entity cannot be deleted if it:	The entity cannot be disabled if it:
Department	1) is set as «Primary Department» 2) has tickets assigned to it	1) is set as «Primary Department»
Agent	1) is set as «Primary Agent» for any department 2) has tickets assigned to them	1) is set as «Primary Agent» for any department 2) has tickets assigned to them
Status	1) is «System Status» 2) is assigned to any ticket	1) is «System Status»
Priority	1) is «System Status» 2) is assigned to any ticket	1) is «System Priority»

Replying to a ticket

From the backend

Once you open a ticket from the **Help Desk - > View Tickets** grid, you will get to the Ticket Details screen. It is divided into 3 sections.

The right sidebar contains a number of subsections, which provide additional information and facilities for processing the ticket.

Details section represent basic ticket attributes (as explained above):

- **Help Desk Agent** - current assignee
- **Department** - current department
- **Status**
- **Priority**
- **Order**
- **External View** - you can copy the External URL from here
- **Rate** - ticket rating, specified by the customer

What Is "External URL"?

The **External View** link is a long encrypted URL, which allows to access the ticket thread without being logged in to a store account. This link is crucial in case you allow guest submissions, but do not use the Email Gateway functionality.

Customer Summary section contains customer-related info:

- **Customer** - Name and Email address (*for a guest user, Email only*)
- **Country** - *for registered customers only*
- **City** - *for registered customers only*
- **Phone** - *for registered customers only*
- **Customer Note** - this is a special note that can be added by the agents; this record will not be visible in the frontend, and will be displayed in all the ticket from a given customer.

The **Last Customer Orders** section provides summary on customer's most recent purchases (up to 5 records)

The **Last Customer Tickets** section provides summary on customer's most recent tickets (up to 5 records)

Details

Help Desk Agent	Admin
Department	Sales
Status	Waiting for customer
Priority	URGENT
Order	100000014 View Order
Store View	Main Website Main Website Store English
External View	URL
Rate	★★★★★

Customer Summary

Customer	James Stivenson <james@example.com>
Country	US
City	City
Phone	54321
Customer Note	No data

Last Customer Orders

Total Orders:	1 (1 Completed orders)	
Total Invoiced:	\$59.13	

#100000015	Logitech Mouse	\$50.00
Feb 18, 2015		
Complete		
\$59.13		

Last Customer Tickets

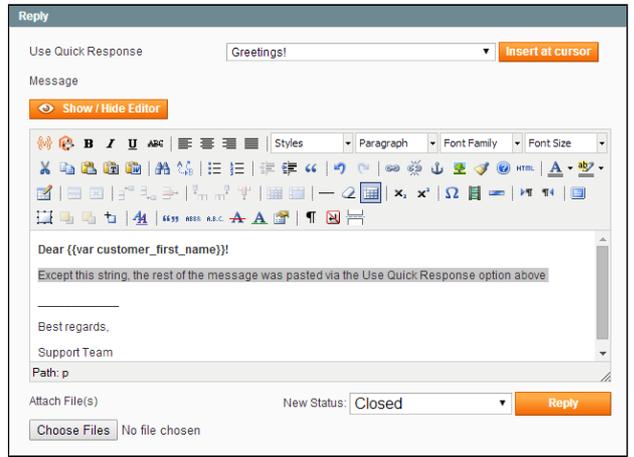
Total Tickets:	1
----------------	---

BXA-00959	Payment
Feb 18, 2015	Can't pay for my order
New	
URGENT	
Sales	
The Admin	

The **Reply** section:

there's where you actually reply to the ticket. This section consists of the text area (with switchable WYSIWYG editor) and the file attachment option.

The **Use Quick Response** option allows inserting pre-defined text shortcuts



Quick Responses

The extension allows storing pre-made reply templates that can be pasted into a ticket reply. You can manage these templates in **Help Desk -> Quick Responses** grid.

Basically, creating a Quick Response only requires specifying **Status** (Enabled / Disabled), **Title** and **Content**. The Storeview selector allows distributing the Quick Responses between the existent storeviews.

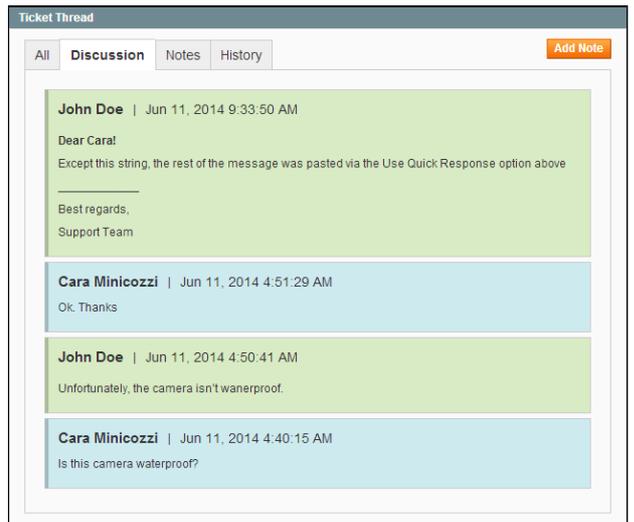
After a Quick Response is saved, it can be pasted to the Reply message.

The **New Status** selector and the **Reply** button - after you click Reply, the message will be submitted to the ticket (and the email will go out to the customer), the ticket status will be set to the selected one.

The **Ticket Thread** section:

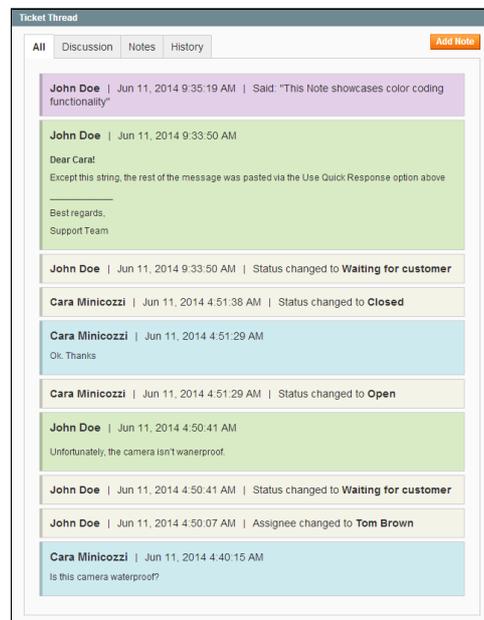
It contains the communication history. There are entries of 3 types - **Message** (shown in the *Discussion* tab), **Notes** (invisible to customers, can be posted by admin users at any time), and **System Events** (Status/ priority changes, re-assignment, etc; displayed in the *History* tab).

The "All" tab includes the entries of all types.



How will it look like if I switch to "All" tab?

Note, the color coding implemented in the extension. Messages from the customer and the agent, system messages and Agent notes are highlighted with different colors.



Via email

Both the customer and the store admin has a possibility to reply to a ticket via email bypassing the module's webform. This functionality is only available if the email parsing is enabled and the email gateways are setup.

To reply to a ticket via email it is enough to respond to any ticket-related notification. Such response will be parsed into the Help Desk and attached to the ticket thread given the following conditions are met:

- The response is sent to the **gateway email address**. *If an email is send directly to customer's / admin's address or to any other destination, the ticket will not get updated.*
- The **ticket ID (ABC-1234) is kept in the subject** of the email. *If the message subject gets altered and the ID is removed, the response will not get attached to the existent thread; a new ticket will be open instead.*

E-mail variables and templates

For HDU 2.10.11 users

The 3.x branch of the extension has different set of the email variables. If you are planning to keep using the existent email templates with the new version, make sure to replace the "old" variables with the new ones.

The extension comes with a number of pre-defined templates for all the module's notifications tab. Beside these default ones, you can use any template created via **System-> Transactional Emails**.

The default templates can also be amended via the Transactional Emails grid, they all have **"AW Help Desk 3 *"** prefix:

Load default template

Template *

Locale *

The Help Desk Ultimate extension allows using a number of variables in outgoing emails (see the list below).

These variable can be used both in department notifications templates and in actual messages.

Variables:

Code	Description
{{var ticket_uid}}	ticket ID
{{var ticket_subject}}	ticket subject
{{var ticket_priority}}	ticket current priority
{{var ticket_status}}	ticket status
{{var ticket_created_at}}	ticket creation date
{{var ticket_first_message}}	content of the 1st ticket message
{{var message}}	content of the latest relevant message
{{var customer_name}}	customer's full name
{{var customer_first_name}}	customer's first name
{{var customer_email}}	customer's email address
{{var department_title}}	the title of the current department
{{var agent_name}}	the name of the current agent

Additional facilities

Statistics

The 3.0+ version of the extension features reporting system that allows estimating the effectiveness and the quality of the service. There are 3 types of reports, available through the **Help Desk -> Statistics** backend menu entry.

Workload Report

This report is meant to give the instant idea of the current load level of the support team. The report lists total number of ticket per-department and per-agent. The tickets are summarized by status and by priority.

E.g., an Open ticket of Urgent status will add +1 in 3 columns: *New and Open Tickets*, *Open Tickets* and *Urgent Tickets*.

The report can be exported into a file; .csv and .xml output formats are supported

Departments							
Department Name	New and Open Tickets	New Tickets	Open Tickets	Urgent Tickets ?	ASAP Tickets ?	Waiting for Customer Tickets	
Sales	1	0	1	1	0	1	
Repairs	0	0	0	0	0	1	
Returns	1	1	0	0	0	0	

Agents							
Agent Name	Department(s)	New and Open Tickets	New Tickets	Open Tickets	Urgent Tickets ?	ASAP Tickets ?	Waiting for Customer Tickets
Super Admin	Sales Repairs Returns	1	1	0	0	0	1
John Doe	Sales	1	0	1	1	0	0
Thomas Sawyer	Sales	0	0	0	0	0	1

Agent Statistics

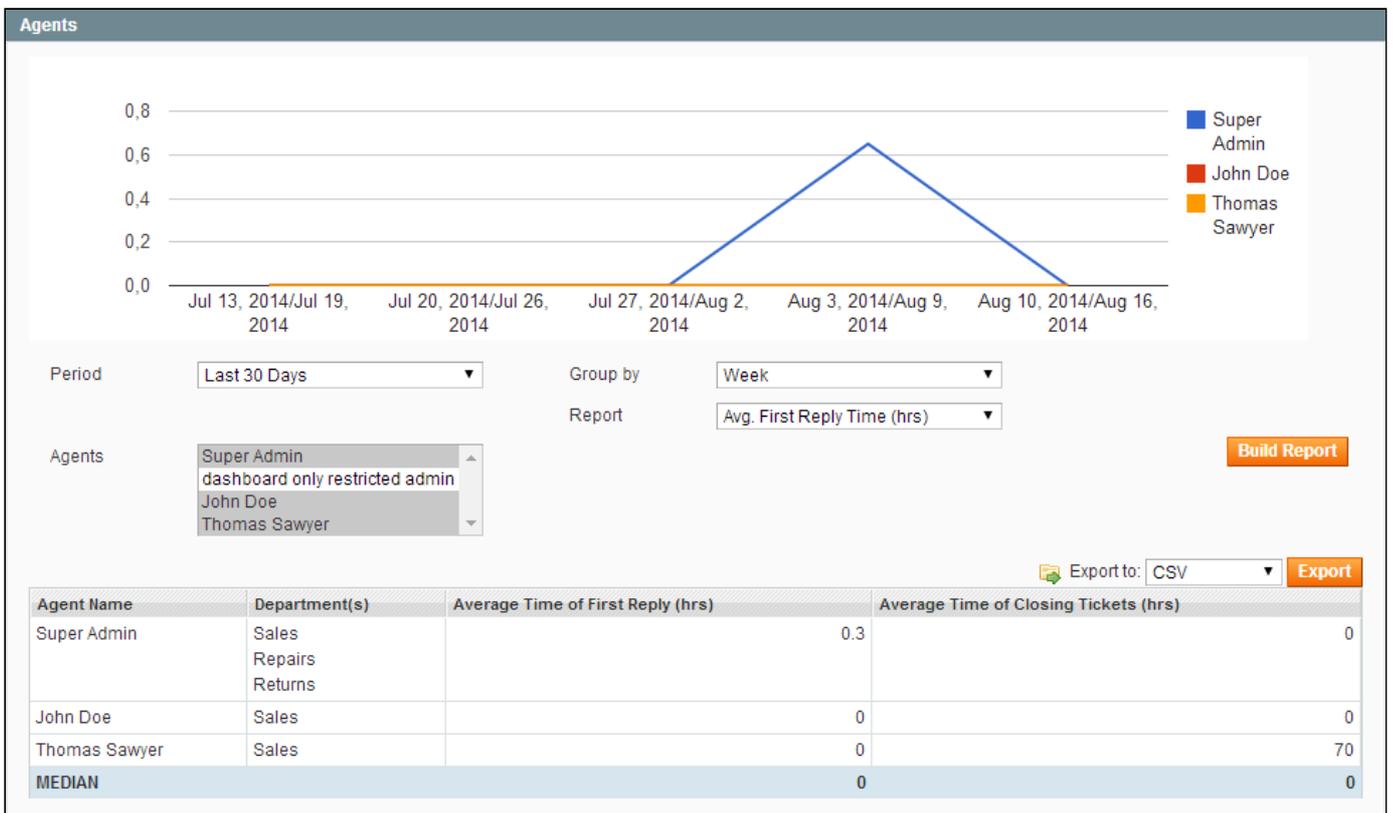
This report is aimed at estimating the effectiveness of support Agents. It calculates the Average First Response Time and Average Ticket Closing Time parameters per-agent. The Graph can be switched to represent either First Response or Closing times.

Calculations

There are 2 important facts about how the average values are calculated:

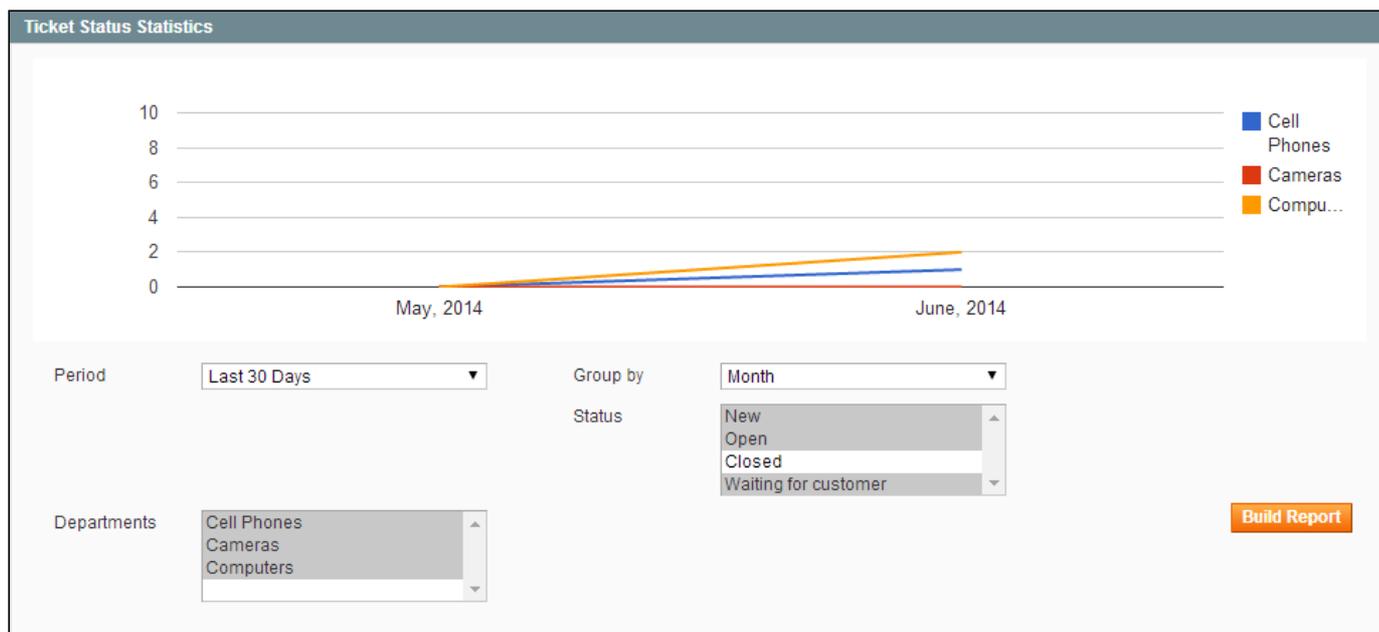
- For more accurate statistics calculations, the extension uses Median method. You can learn more about this method from [Wiki article](#).
- The First Response Time is counted since a new ticket is submitted and until it acquires a first response from a Help Desk agent.

The report can be exported into a file; .csv and .xml output formats are supported



Ticket Status Statistics

This report shows the dynamics of ticket status changes. It represents the number of ticket that obtained any of the selected Statuses within the reporting period. The graph is built per-department.



E-mail Rejecting

The Help Desk Ultimate extension allows setting up automated spam filters. If *Header*, *Subject* or *Body* of an incoming email contains some specific text, this message can be blocked. To configure the email spam filters:

- Navigate to **Help Desk-> E-mail Rejecting-> Manage Patterns**.
- Specify pattern based on regular expression: http://en.wikipedia.org/wiki/Regular_expression
- Specify 'scope' of e-mail, which would be validated by pattern.

General Information

Title * X-Spam header

Status * Enabled

Scope * Headers, Subject, Body

Pattern * /^x-spam: (?!(not detected))*\$imi

You can also view all the rejected emails in **Help Desk -> Email Rejecting -> Rejected Emails** grid.

Uninstallation

If you just need to temporary disable the extension, you can just do the steps 1-5, without deleting the files of the extension.

- Disable compilation, in case it is enabled.
- Login to your FTP, navigate to **app/etc/modules/**
- Open the file **AW_Helpdesk3.xml** and change the following line:

```
<active>true</active>
```

to

```
<active>>false</active>
```

Now your Magento is unaware of the existence of this module.

- Clear the cache under **var/cache**
- Make sure that the site is working properly, otherwise roll back the changes and apply to our [technical support](#).

f. If everything works fine, it is safe to delete the files of the extension.

In case you need to clean the database, **make a backup** and then run the following query in MySQL:

```
DROP TABLE IF EXISTS 'aw_hdu3_customer_note'  
DROP TABLE IF EXISTS 'aw_hdu3_template'  
DROP TABLE IF EXISTS 'aw_hdu3_department_agent_link'  
DROP TABLE IF EXISTS 'aw_hdu3_department_notification'  
DROP TABLE IF EXISTS 'aw_hdu3_department_permission'  
DROP TABLE IF EXISTS 'aw_hdu3_gateway_mail_attachment'  
DROP TABLE IF EXISTS 'aw_hdu3_gateway_mail_reject_pattern'  
DROP TABLE IF EXISTS 'aw_hdu3_gateway_mail'  
DROP TABLE IF EXISTS 'aw_hdu3_gateway'  
DROP TABLE IF EXISTS 'aw_hdu3_migration_temp_data'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_status_label'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_priority_label'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_message'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_history_additional'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_history_attachment'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_history'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_status'  
DROP TABLE IF EXISTS 'aw_hdu3_ticket_priority'  
DROP TABLE IF EXISTS 'aw_hdu3_department'  
DROP TABLE IF EXISTS 'aw_hdu3_department_agent'  
DELETE FROM core_resource WHERE code = 'aw_hdu3_setup'
```

Note, if you are using the table with prefixes, you must specify them in all table names.

If you are not sure how to do that or expect any troubles with it, please contact your server administrator regarding the matter.

If you remove the tables as it is described above, you will need to reconfigure the extension completely again after the extension is reinstalled (department/gateway details, etc). All conversations history will be lost as well.

Troubleshooting

After the extension installation the store gives an error, or blank page, or suggests to start Magento installation procedure.

Change the owner of the extracted extension files to the web server user and set 775 permissions on them. Clear the store cache and try again.

After the extension installation I receive a 404 error in System->Configuration->Help Desk Ultimate.

Logout from backend and login back.

There is no aheadWorks extensions under my configuration section, or having the extension tab clicked I get a blank page, or Access Denied error.

Clear the store cache, browser cookies, logout and login again.

I've set up everything correctly, inserted the HTML code but there is nothing on that page.

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

My configuration changes do not appear on the store.

Clear the store cache, clear your browser cache and domain cookies and refresh the page.

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