

Help Desk Ultimate

for Magento 2



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About Help Desk Ultimate

Magento 2 Help Desk Ultimate effectively arranges operations with customer tickets. Tickets can be created by customers from the dedicated account area, contact form, email, or by admins from the backend by assigning tickets to individual departments or support agents. Additionally, the module automates recurring tasks, including ticket status changing and agent/department assignments.

Compatibility: Magento Open Source 2.1.X - 2.3.X, Magento Commerce 2.1.X - 2.3.X

Introducing Help Desk Ultimate

The Help Desk Ultimate extension for Magento 2 helps to arrange a support center in a web store:

- Ticket automation, including email sending to another customer/agent, ticket status/priority change, ticket reassigning to another agent/department;
- Detailed ticket processing page with the key ticket, customer info, ticket and purchase history, and message area (internal note support is included);
- Possibility to send individual tickets to CC recipients (from the ticket processing page);
- Coupon code generation right from the ticket processing page (provided by the [Coupon Code Generator](#) integration).

Extension Logic

The extension streamlines the customer ticket management process. Tickets are located at the ticket grid and can be assigned to a particular help desk agent/department. Help desk agents/departments can reply to tickets, set ticket priority, assign tickets to orders, etc. Finally, ticket control can be partially automated thanks to the automation feature that allows automatically sending notifications, changing ticket priority, etc. depending on the conditions and actions set.

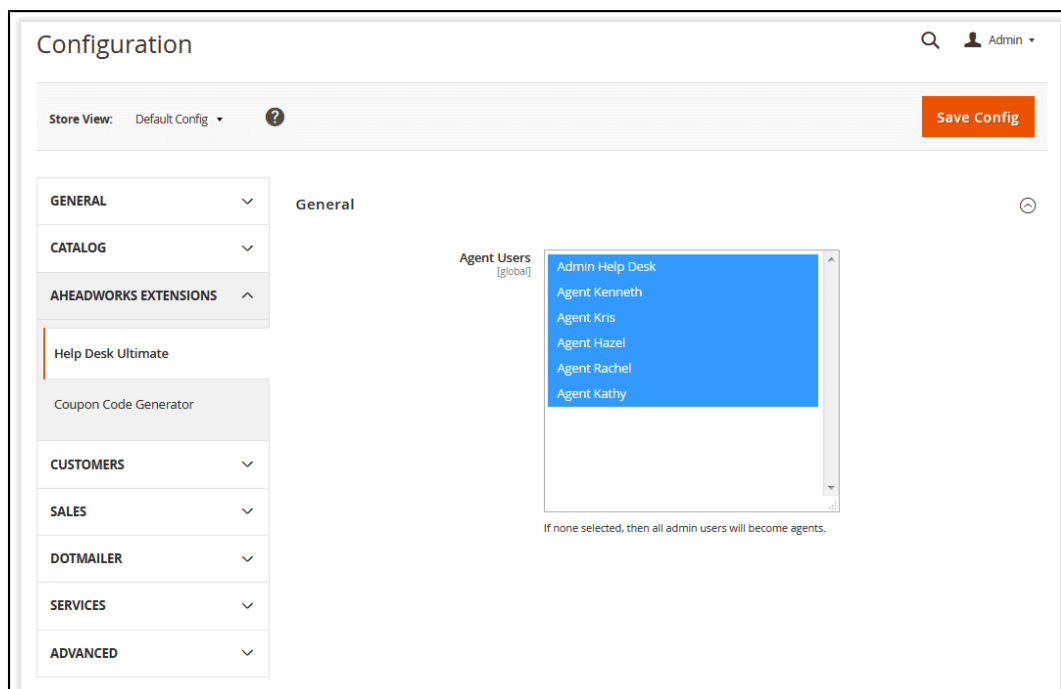
Reference Table

- **Automation** - a scheme with a set of conditions that dictates how the extension should behave on certain occasions;
- **Email gateway** - an email address associated with the Help Desk Ultimate extension which is used to receive customer inquiries and send emails to both customers and administrators.
- **Email template** - a predefined email message;
- **Help desk agent** - an admin user eligible to answer help desk tickets;
- **Ticket** - a customer inquiry submitted via the contact form, the 'Help Desk Ultimate' section, or direct email to the extension's gateway;
- **Ticket thread** - a block containing all customer and help desk agent messages regarding a particular ticket.

Getting Around

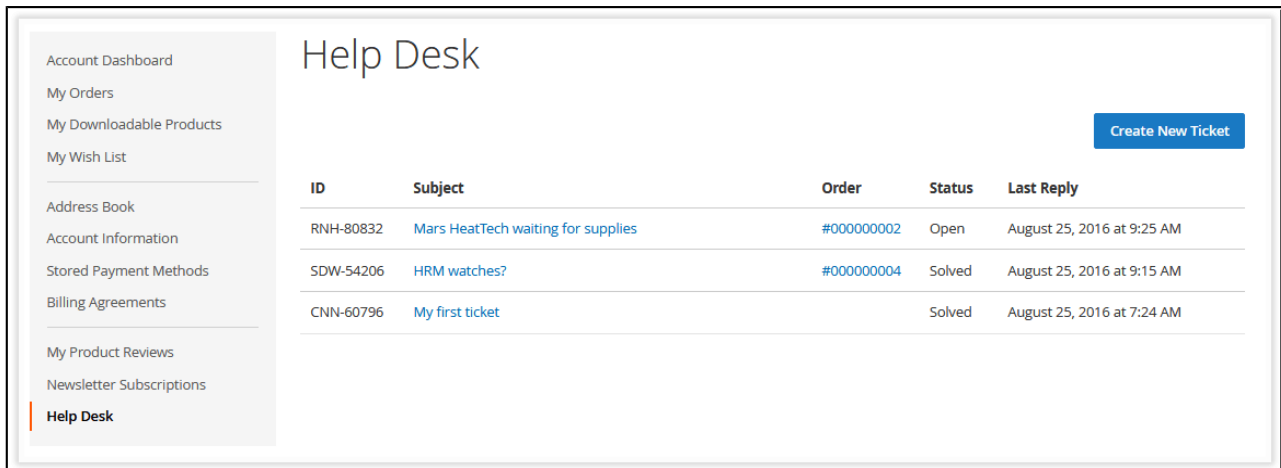
General Settings

Once installed, the Help Desk Ultimate extension introduces its configuration section to **Stores > Configuration > AHEADWORKS EXTENSIONS > Help Desk Ultimate**. There you can select the help desk agents eligible to respond to tickets.



Customer Area

Additionally, Help Desk Ultimate introduces its section to a customer's account (My account > Help Desk Ultimate).



ID	Subject	Order	Status	Last Reply
RNH-80832	Mars HeatTech waiting for supplies	#000000002	Open	August 25, 2016 at 9:25 AM
SDW-54206	HRM watches?	#000000004	Solved	August 25, 2016 at 9:15 AM
CNN-60796	My first ticket		Solved	August 25, 2016 at 7:24 AM

The new section represents a ticket grid where one can find all the tickets submitted with the following information:

- **ID** - an individual number of a ticket used for identification purposes;
- **Subject** - the ticket's subject;
- **Order** - an order ID the ticket relates to;
- **Status** - the status of the ticket:
 - *Open* - the customer's reply is required;
 - *Pending* - the administrator's reply is required;
 - *Solved* - the ticket was resolved.
- **Last Reply** - the date of the latest reply from either the customer or store administrator to the ticket.

Ticket subject and order ID are represented by internal store links. By clicking the order ID, the customer is redirected to the '**My Orders**' section with the corresponding order info.

When clicking the ticket's subject, the customer is redirected to the corresponding ticket thread.

[CNN-60796] My first ticket

[Back](#)

Status	Solved
Order	Unassigned

This ticket is solved. Click [here](#) to create a new one.

John Doe 2016, 25 Aug, 07:24
Oh, I can close it myself! Sorry for bothering.
Have a nice day!

John Doe 2016, 25 Aug, 07:23
Thanks, will try it out!
Will get back to you if I have any questions.

admin admin 2016, 25 Aug, 07:00
Hi there, John,
We are glad you have decided to contact us and delighted to see that you like the new Help Desk system.
Let us know if you have any questions on the products you purchased or need any assistance from us.
Thank you.

John Doe 2016, 24 Aug, 14:01
Hi, support team!
I've noticed a Help Desk Ultimate section in my account and just wanted to say hi :)

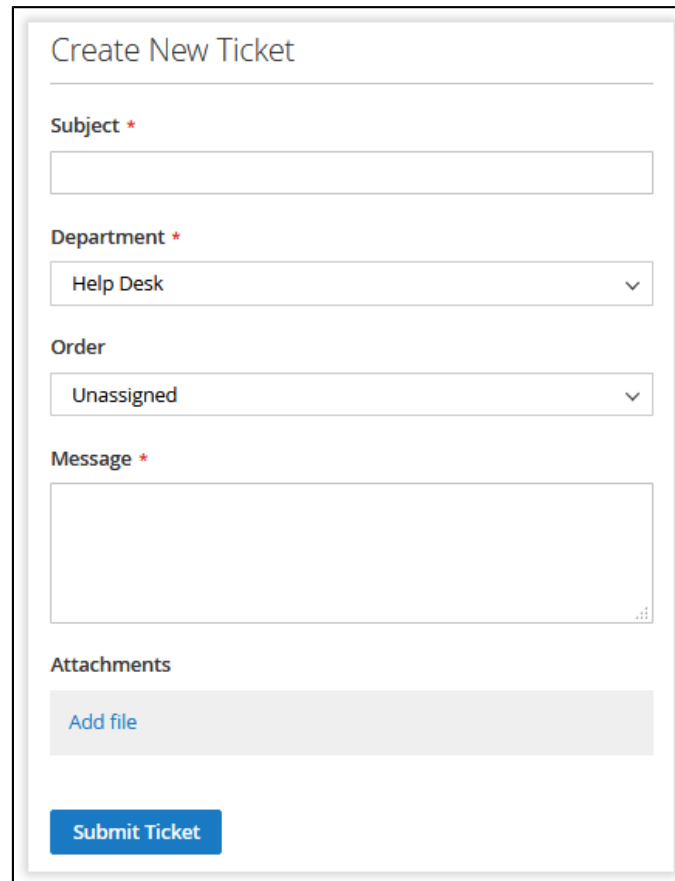
Ticket thread lists all customer and store administrator messages sort by the date sent. First messages are displayed at the bottom and the latest ones are at the top of the thread. Here the customer can send a reply with a file attached or close the ticket if assistance is no longer required and/or the issue is resolved.

Submitting a Ticket

The Help Desk Ultimate extension for Magento 2 introduces multiple ways of submitting a ticket to customers.

Customer Account Area

The first place where customers are suggested to open a ticket is the 'Help Desk' section in the customer area.



The image shows a 'Create New Ticket' form with the following fields and options:

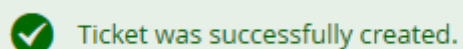
- Subject ***: A text input field.
- Department ***: A dropdown menu with 'Help Desk' selected.
- Order**: A dropdown menu with 'Unassigned' selected.
- Message ***: A large text area for the ticket description.
- Attachments**: A section with an 'Add file' button.
- Submit Ticket**: A blue button at the bottom of the form.

Here customers are presented with the '**Create New Ticket**' form suggesting to fill in the following information:

- **Subject** - a ticket subject for quick issue identification;
- **Department** - a Help Desk thematic unit used to specify the type of the inquiry;
- **Order** - an order the ticket inquiry is referred to;
- **Message** - an inquiry to send to the store administrator;
- **Attachments** - an optional file attachment illustrating the ticket inquiry.

After the issue is described, the customer clicks **Submit Ticket** . The extension will notify

the customer of the successful ticket submission:



✓ Ticket was successfully created.

Contact Us Form

Another option for the customer to submit a ticket is the native Magento '**Contact Us**' form. The extension fetches all the messages customers leave in the 'Contact Us' form and inserts them into tickets.

When installed, the Help Desk Ultimate extension disables native Magento notifications sent to the store administrator when a customer leaves a message in the 'Contact Us' form.

Instead, all messages left via the 'Contact Us' form are inserted into the tickets, and notifications are sent using the automation settings of the extension.

Direct Email

In addition to the customer account section and the '**Contact Us**' form, customers can submit tickets by emailing messages directly to the Help Desk Ultimate gateway(s).

If the message is sent from the address matching the email the customer uses to register an account at the store, Help Desk Ultimate 'recognizes' that customer and automatically associates the ticket with the customer's account.

If automatic notifications are enabled, customers can directly reply to notification emails sent by the admin.

The logic behind associating email replies with the tickets is the following:

- if the email subject contains no ticket ID, the email from a customer will create a new ticket;
- if the email subject contains ID of the existing open ticket, the email will add a reply to the ticket thread;
- if email subject contains ID of the existing solved ticket, the email will create a new ticket.


Managing Departments

Help Desk Ultimate departments is basically a section of the extension that can serve as the tool for sorting customer tickets or for internal ticket management purposes.

Before using the extension, you will need to create at least a single department. This department will be used to store all tickets submitted to the Help Desk until another one is created.

In addition, every help desk department can be assigned to a particular email gateway. The assigned email gateway will be used to send ticket-related notifications and convert all the incoming emails into tickets. More information on the Help Desk departments can be found further in this section.

	Name	Gateway	Is Enabled	Is Visible on the StoreFront	Is Default Department	Websites
<input type="checkbox"/>	General Issues	helpdesk@active.com	Yes	Yes	Yes	Main Website
<input type="checkbox"/>	Warranty	warranty@active.com	Yes	Yes	No	Main Website
<input type="checkbox"/>	Technical Support	support@active.com	Yes	Yes	No	Main Website

Departments are created and managed under **Customers > Help Desk Ultimate by Aheadworks > Departments**. To create a new department, click 

General Department Settings

Name *
Visible to admins only

Websites *

Is Enabled Yes

Is Visible on the StoreFront Yes


Is Default Department Yes
Number of default departments is limited to one per website

The general section of the department configuration page defines the basic attributes of the department:

- **Name** - the name of the Help Desk department (for internal identification purposes);
- **Websites** - the website(s) the department should be available at;
- **In Enabled** - defines if the department is enabled and can be used by customers and admins;
- **Is Visible on the StoreFront** - defines if the department can be used by customers to identify the type of the request or only for the in-store management purposes;
- **Is Default Department** - defines if the department can be used by default.

The default department stores all the submitted tickets. Every ticket can be assigned to the department. You can have no departments available at the storefront. However, when a customer submits a ticket, it will be stored within the default department.

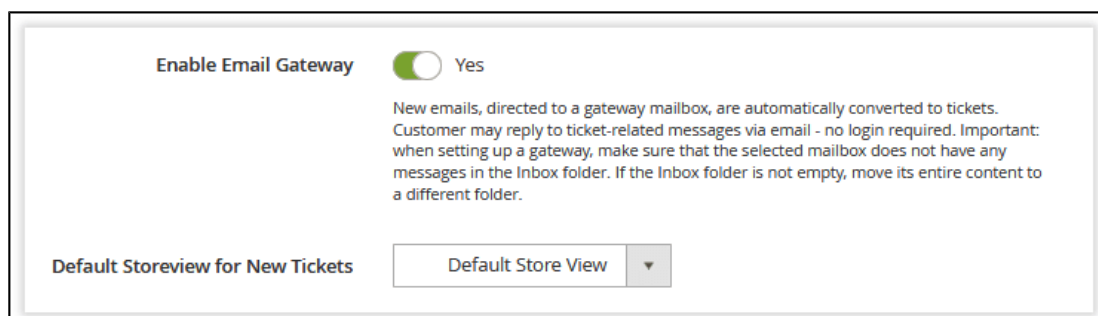
Storefront Labels



The screenshot shows a configuration window titled "StoreFront Labels". It features a "Store View" dropdown menu set to "Default Store View" and a "Department Name (displayed to visitors) *" text input field containing "Help Desk". A trash icon is visible to the right of the input field. Below the input field is an "Add" button.

The '**Storefront Labels**' section of the department configuration page sets up the department's name to be displayed at the storefront in the submit ticket form. Only a single department name can be assigned per store view.

Email Gateway Settings



The screenshot shows the "Enable Email Gateway" section. It includes a toggle switch labeled "Enable Email Gateway" which is currently turned on (Yes). Below the toggle is a paragraph of text: "New emails, directed to a gateway mailbox, are automatically converted to tickets. Customer may reply to ticket-related messages via email - no login required. Important: 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." At the bottom, there is a "Default Storeview for New Tickets" dropdown menu set to "Default Store View".

The '**Gateway**' section of the department configuration page sets up a Help Desk department email gateway. The email gateway can be used to:

1. Send email notifications and ticket updates to both customers and Help Desk agents;
2. Collect and insert all the incoming emails into the tickets. Instead of using the contact form, customers can create tickets right from the emails sent to the email gateway.

Basically, the email gateway is an email address used by the extension to receive and send messages. It can be a simple Gmail account or a company email. If you are not sure about your email gateway settings, contact your email provider.

Use only the dedicated email address for the Help Desk Ultimate gateway. Make sure that the mailbox does not have any messages in the 'Inbox' (main) folder. If the mailbox is not empty, make sure to migrate / archive all the important content.

Once configured, the extension will migrate all messages from the email gateway to tickets. Any incoming email will result in a ticket created.


To avoid spam, do not use the Help Desk Ultimate gateway for other purposes.

The screenshot shows a configuration form for the Help Desk Ultimate Gateway. It includes the following fields and options:

- Default Storeview for New Tickets:** A dropdown menu set to 'Default Store View'.
- Protocol:** A dropdown menu set to 'POP3'.
- Gateway Host:** A text input field with a red asterisk. Below it, a note says 'for example, imap.gmail.com'.
- Gateway Email:** A text input field with a red asterisk. Below it, a note says 'An email address for Help Desk Ultimate to fetch messages from. This address must NOT be used by any other person or system!'.
- Login:** A text input field with a red asterisk.
- Password:** A text input field with a red asterisk.
- Use SSL/TLS:** A dropdown menu set to 'None'.
- Port:** A text input field. Below it, a note says '993 for IMAP-SSL, 143 for IMAP-TLS, 110 for POP3 and 995 for POP3-SSL by default. 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.'
- Delete Emails from Host:** A toggle switch currently set to 'No'.
- Test Connection:** A dark button at the bottom of the form.

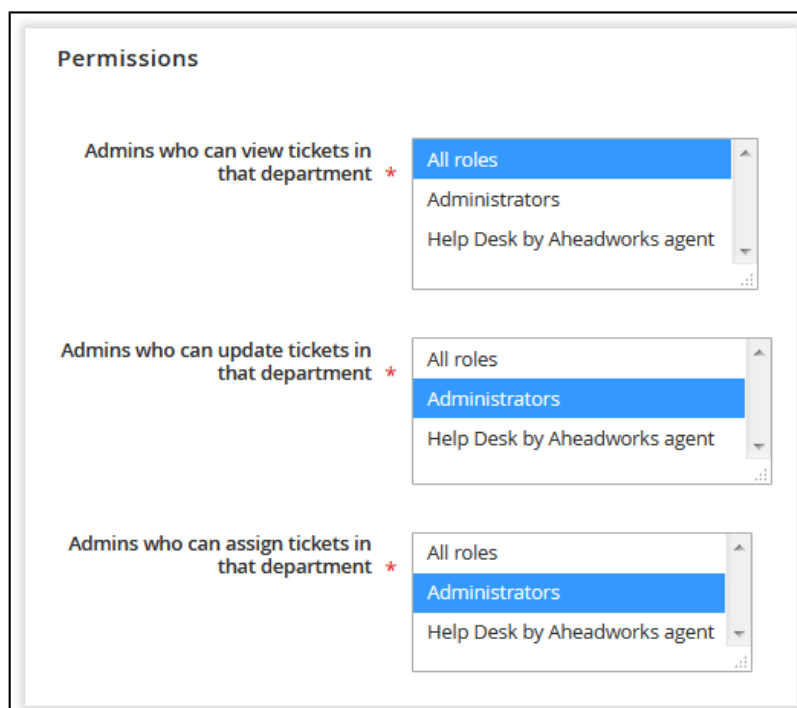
The section comes with the following settings:

- **Protocol** - defines if the extension should use an IMAP or POP3 protocol;
- **Gateway Host** - the gateway host;
- **Gateway Email** - the gateway email address that will be used to receive customer tickets;
- **Login** - the gateway email login;
- **Password** - the email gateway password;
- **Use SSL/TLS** - the security protocol to connect to the email gateway;
- **Port** - the port to connect to the email gateway depending on the security protocol selected;
- **Delete Emails from Host** - defines if the email already added to the ticket should be removed from the email gateway. Pay close attention to this setting if you have limited email gateway storage.

Once done with the settings, click  .

The email gateway for the department is now configured, and the Help Desk Ultimate extension is ready for work. Upon the following cron launch, first emails (if there are any) will be added to the tickets.

Permission Settings



The screenshot shows a 'Permissions' section with three dropdown menus. Each menu is titled with a permission type and has a red asterisk next to it. The first menu is 'Admins who can view tickets in that department', the second is 'Admins who can update tickets in that department', and the third is 'Admins who can assign tickets in that department'. Each menu has three options: 'All roles', 'Administrators', and 'Help Desk by Aheadworks agent'. The 'All roles' option is selected in all three menus.

The '**Permissions**' section of the department settings page defines what administrator roles are eligible for particular actions within a department:

- **Admins who can view tickets in that department** - defines what administrator roles can look through the tickets assigned to the department;
- **Admins who can update tickets in that department** - defines what administrator roles can reply to the tickets and change ticket statuses within the department;
- **Admins who can assign tickets in that department** - defines what administrator roles can assign tickets to the department.

The native Magento administrator role permissions are still counted when it comes to ticket and department access:

1. To edit departments and automations, you need to have the required set of permissions in Role Resources;
2. Role scopes of Magento Enterprise define the visibility of the 'Departments' and 'Tickets' grids;
3. Mass actions, ticket assignment, and department change work for the tickets you have the right to update.

Adding a Department Selector to the Custom CMS Contact Us Page

In case you are using custom CMS page as a Contact Us page, you may want to add a Help Desk Ultimate department selector to it.

To do this, follow these steps:

Step 1

Create or open the required CMS page

Step 2

In the design tab where the contact form and department selector are added, add the following code:

```
<referenceContainer name="content">

    <block class="Magento\Contact\Block>ContactForm" name="contactForm" template="Magento_Contact::form.phtml">

        <container name="form.additional.info" label="Form Additional Info"/>

    </block>

</referenceContainer>

<referenceBlock name="form.additional.info">

    <block class="Aheadworks\Helpdesk\Block>Contact\Form" name="aw_helpdesk_contact_form" template="contact/form.phtml" />

</referenceBlock>
```

Step 3

Navigate to your Magento installation folder and open the following file:
app/code/Aheadworks/Helpdesk/Model/Contact/ContactPlugin

At line 164, change:

```
contact/index
```

to:

```
<URL_key_to_created_CMS_page>
```

Managing Tickets

In the backend, the extension adds a new section under **Customers > Help Desk Ultimate by Aheadworks**. To manage tickets, navigate to the **'Tickets'** page.

ID	Priority	Status	Subject	Department	Customer	Last Replied By	Agent	Last Reply	Order	Messages by Customer	Messages by Agent	Store View
GMG-09876	Normal	Open	ada <najeeb_ahmed@msn.com> via "Contact Us"	General Issues	ada	ada	Agent Kenneth	Feb 12, 2019 7:35:07 AM	Unassigned	1	0	Main Website Main Website Store Default Store View
CRK-27393	Normal	Open	Guest <guest@test.com> via "Contact Us"	General Issues	Guest	Guest	Agent Kenneth	Feb 1, 2019 12:51:43 PM	Unassigned	1	0	Main Website Main Website Store Default Store View
ABO-11296	Normal	Pending	My PayPal payment is not processed. What's the reason?	General Issues	Katie Hall	Admin Help Desk	Agent Kris	Jan 15, 2019 1:02:55 PM	Unassigned	0	2	Main Website Main Website Store Default Store View

From the ticket page, you can leave replies to tickets, change their priority, assign them to another Help Desk agent/department, or change ticket statuses.

The **'Tickets'** grid contains all the ticket-related information, including the link to the customer account, the link to the order associated with the ticket, the name of the responsible agent.

Replying to Tickets

When clicking a ticket subject in the grid, you are redirected to the ticket details page:

The ticket details page is composed of two functional sections.

The ticket information block on the left contains all the ticket -, customer -, and order-related information.

From the ticket message area on the right, you can reply to customer messages, leave internal notes, and update ticket status.

On Magento 2.3.0 with PHP 7.2 installed, the files can't be uploaded to the newly created tickets in the admin area. This relates to a bug in the Magento 2.3.0 version. To fix this, apply the following patch: <https://github.com/magento/magento2/pull/19249>

The problem will be solved in Magento 2.3.1.

Ticket Information Block

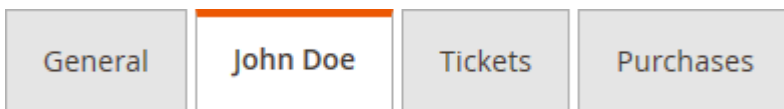
As it was mentioned earlier, the ticket information block represents all ticket, customer, and order-related information.

The block consists of four tabs, each representing a corresponding portion of the information available for the Help Desk agent's convenience.

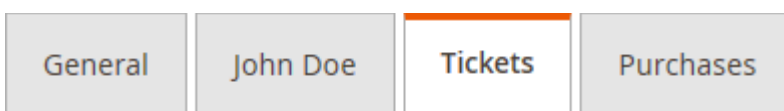


The 'General' section represents the information related to the currently opened ticket. Additionally, you can adjust some attributes here:

- **Current ticket status** - the state of the ticket: open, pending, or solved;
- **Priority** - ticket priority: low, normal, or high;
- **Department** - the department the ticket belongs to;
- **CC Recipients** - the CC recipients that will receive all the messages and updates related to the ticket;
- **External Link** - a link for sharing a ticket thread with a third party;
- **Order Number/Status/Date** - associated order information;
- **Customer Group** - the group the customer belongs to.



The customer info section contains the customer information, including name, email, group, and date registered.



The '**Tickets**' section lists all the tickets submitted by the customer.

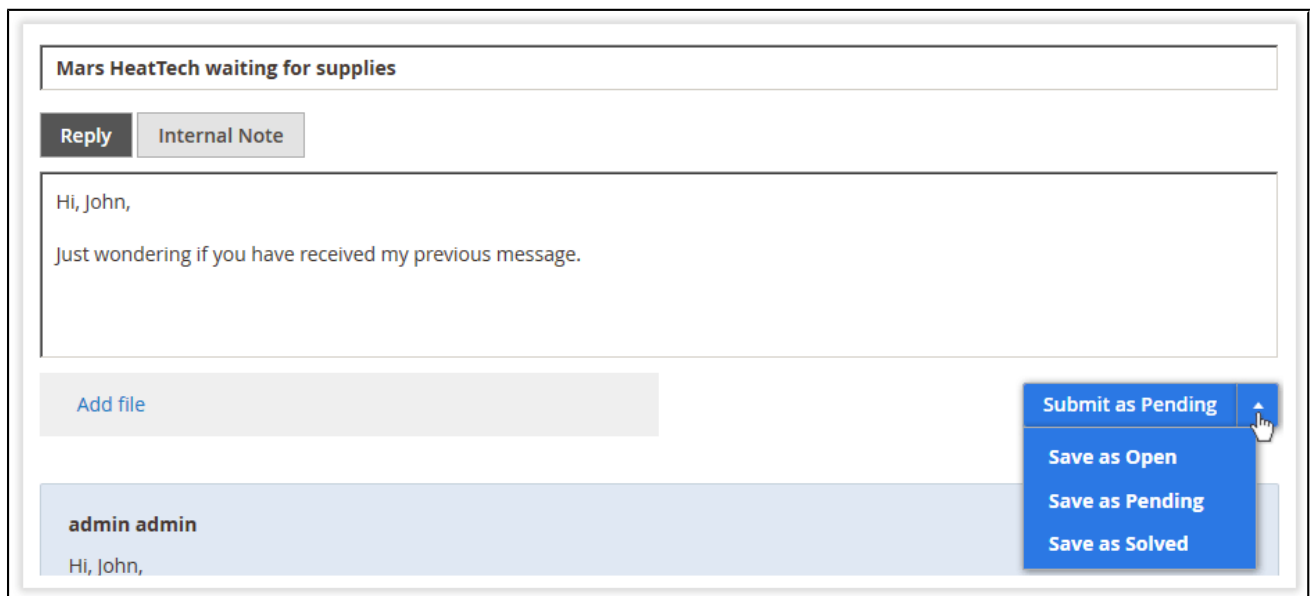


The 'Purchases' section contains:

- Total purchases amount;
- Total orders;
- Total items;
- List of the products purchased per order.

Ticket Thread

The ticket thread section is where all "magic" happens. Here you are suggested to reply to customer tickets.



The screenshot shows a ticket thread interface. At the top, there is a header "Mars HeatTech waiting for supplies". Below this, there are two buttons: "Reply" (highlighted in dark grey) and "Internal Note" (light grey). The main content area contains a message: "Hi, John, Just wondering if you have received my previous message." Below the message is an "Add file" button. At the bottom, there is a light blue bar representing the sender, "admin admin", with the text "Hi, John,". On the right side of this bar, there is a blue dropdown menu with the following options: "Submit as Pending" (highlighted with a mouse cursor), "Save as Open", "Save as Pending", and "Save as Solved".

There are two types of Help Desk messages you can leave: replies and internal notes.

A reply suggests that the submitted message will be sent to the customer. The reply is enabled by default and activated by the **Reply** button.

The Internal Note feature suggests that the message submitted will be available for Help Desk agents only and will not be visible to the customer. The '**Internal Note**' message type can be enabled by clicking **Internal Note**.

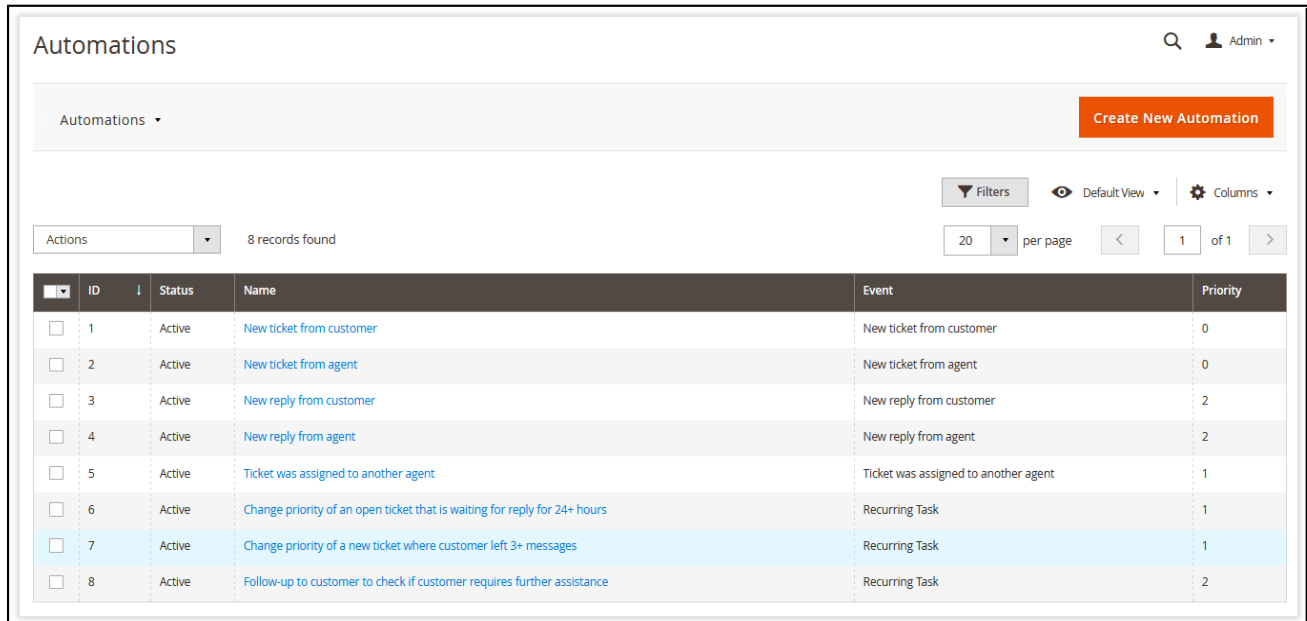
To submit the message either as a reply or internal note, click **Submit as Pending**.

Additionally, you can change the status of the ticket to '**Open**', '**Pending**', or '**Solved**' without sending a message.

Automations

Automations are a set of adjustable Help Desk conditions that help to automate routine ticket management operations, including ticket status change, email notifications, and ticket updates.

Upon a certain event based on the conditions set, automation executes the set action on cron launch. Automation settings can be found under **Customers > Help Desk Ultimate by Aheadworks > Automations**.



ID	Status	Name	Event	Priority
1	Active	New ticket from customer	New ticket from customer	0
2	Active	New ticket from agent	New ticket from agent	0
3	Active	New reply from customer	New reply from customer	2
4	Active	New reply from agent	New reply from agent	2
5	Active	Ticket was assigned to another agent	Ticket was assigned to another agent	1
6	Active	Change priority of an open ticket that is waiting for reply for 24+ hours	Recurring Task	1
7	Active	Change priority of a new ticket where customer left 3+ messages	Recurring Task	1
8	Active	Follow-up to customer to check if customer requires further assistance	Recurring Task	2

Here you are presented with the '**Automations**' grid.

After the extension is installed, the grid will list a set of eight rules. These rules consider customer replies to send email notifications, help to highlight the tickets that need a reply and follow up customers after the issue is reported.

Automation rules work on the following pattern:

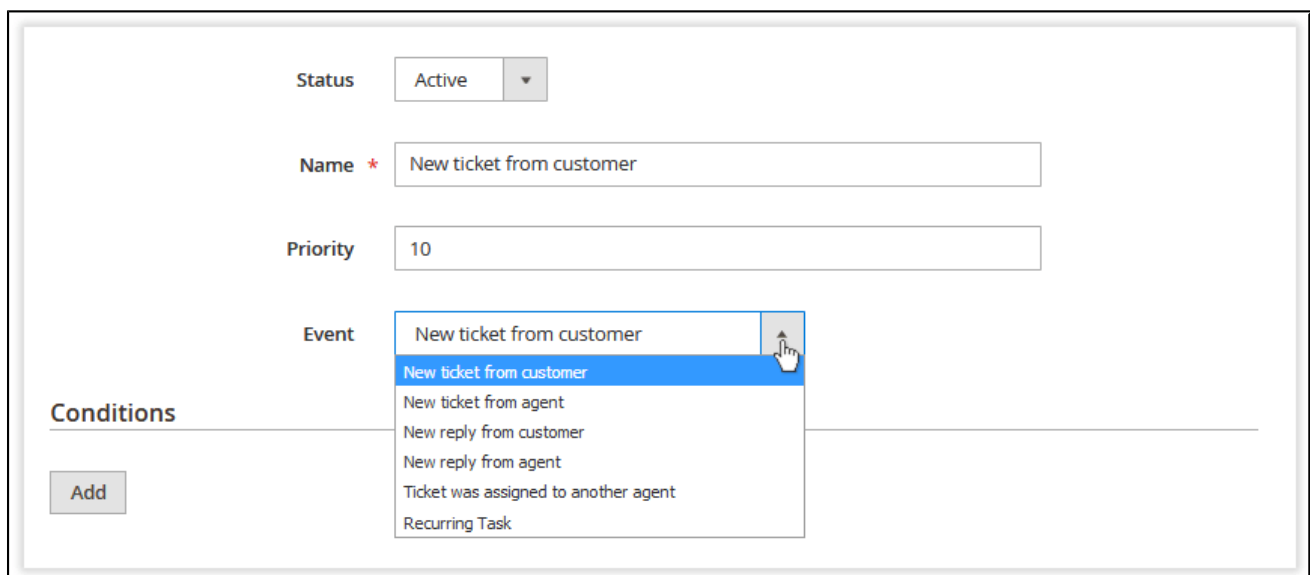
- 1) Cron launches an automation rule and triggers an event;
- 2) The extension checks if any of the tickets match the conditions of the event;
 - a) a) If the conditions of the event are met, the extension launches an automatic action;
 - b) b) If the conditions of the event are not met, the extension stops executing the automation rule until the next cron launch.
- 3) The extension stops executing the rule until the next cron launch

Creating an Automation Rule

To create an automation rule, click [Create New Automation](#).

Selecting an Event

In the first section of the page, you are suggested to select an event that will trigger an automatic ticket action.



The screenshot shows a form for creating an automation rule. The form includes the following fields:

- Status:** A dropdown menu set to "Active".
- Name *:** A text input field containing "New ticket from customer".
- Priority:** A text input field containing "10".
- Event:** A dropdown menu with a list of options: "New ticket from customer", "New ticket from agent", "New reply from customer", "New reply from agent", "Ticket was assigned to another agent", and "Recurring Task". The "New ticket from customer" option is currently selected and highlighted in blue.

Below the form, there is a section labeled "Conditions" with an "Add" button.

The event defines when the automation rule should be triggered. The extension provides six options;

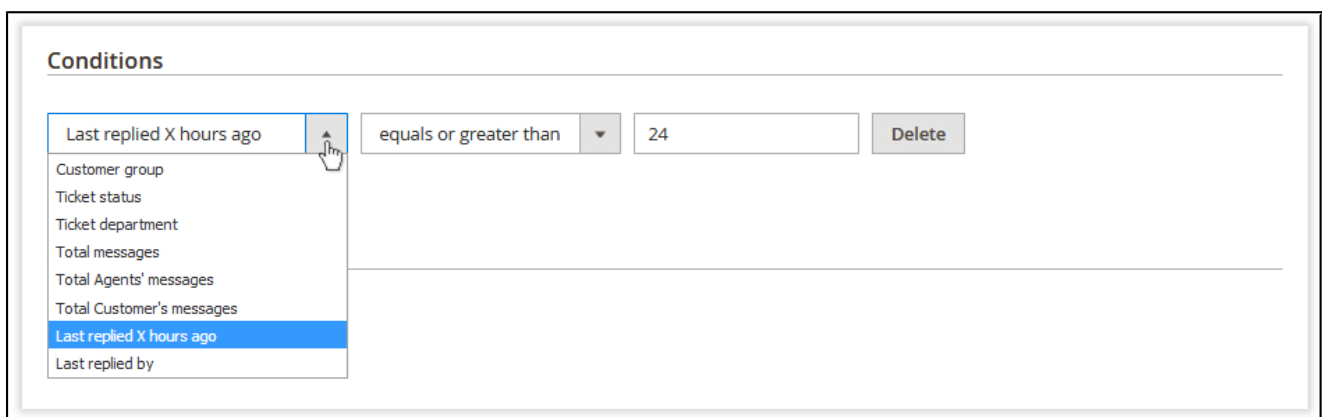
- **New ticket from customer** - when a customer submits a new ticket;
- **New ticket from agent** - when an agent creates a ticket for a customer;
- **New reply from customer** - when the customer replies to the ticket;
- **New reply from agent** - when the agent replies to a ticket;
- **Ticket was assigned to another agent** - when the ticket is assigned to another agent;
- **Recurring Task** - a recurring task that will be executed by the extension upon every cron launch.

'**Recurring Task**' differs from other events by its functionality. This event serves as a reminder.

For example, if the ticket has not been replied for more than 24 hours, 'Recurring Task' can increase the ticket priority and send an email notification to the responsible Help Desk agent.

Defining Conditions

In the '**Conditions**' section, you are suggested to specify when the event should be triggered.



The screenshot shows a 'Conditions' configuration panel. On the left, a dropdown menu is open, listing various conditions: 'Last replied X hours ago', 'Customer group', 'Ticket status', 'Ticket department', 'Total messages', 'Total Agents' messages', 'Total Customer's messages', 'Last replied X hours ago' (highlighted), and 'Last replied by'. To the right of the dropdown, the selected condition is 'Last replied X hours ago', followed by a dropdown menu showing 'equals or greater than', a text input field containing '24', and a 'Delete' button.

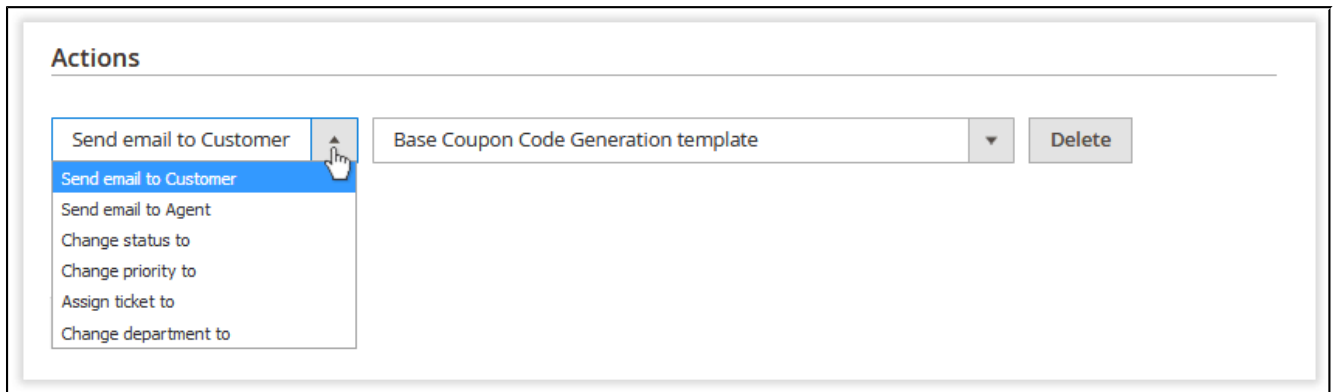
Each event comes with a dedicated set of conditions. Most of the conditions are ticket-related. However, some of them are customer-oriented and target particular customer groups.

The conditions are similar to those of Magento product attributes and follow the same pattern:

If CONDITION is equals/greater/is/isn't value then...

Setting up Actions

In the '**Actions**' section, you are suggested to specify which actions should be taken upon meeting the specified condition(s).



The actions include sending email notifications to both the customer and Help Desk agent, ticket status and priority change, and assigning the ticket to a particular Help Desk agent.

When done setting up the actions, click . The automation rule is good to go.

For an in-depth look visit Help Desk Ultimate demo store at the extension's [product page](#).

Feel free to contact our support team with any questions:

[Submit a help desk ticket](#)

Call us:

US: +1 (646) 480 - 0154

UK: +44 (20) 8133 - 0154