

UVdesk Helpdesk

 webkul.com/blog/uvdesk-magento2-free-helpdesk-ticket-system/

January 31, 2017

UVdesk Helpdesk is an amazing extension which allows the customers to create support tickets regarding their queries. The customers can easily create a ticket from the UVdesk option available in My Account section.

The admin or its assigned agents can manage the tickets either from Magento backend or from UVdesk Dashboard. With the help of UVdesk Connector, all the information about the tickets is automatically synchronized between your Magento store and your UVdesk Dashboard.

Every ticket has a unique ticket number assigned to it which helps in managing them. Information such as ticket status, ticket priority, ticket labels, the number of replies etc can also be visible by the admin and agents. Having a helpdesk ticket system for any kind of business small or big is very much necessary for providing customer service and support.

Please Note – To use this extension, you must have UVdesk account. You can create a free UVdesk account [here](#).

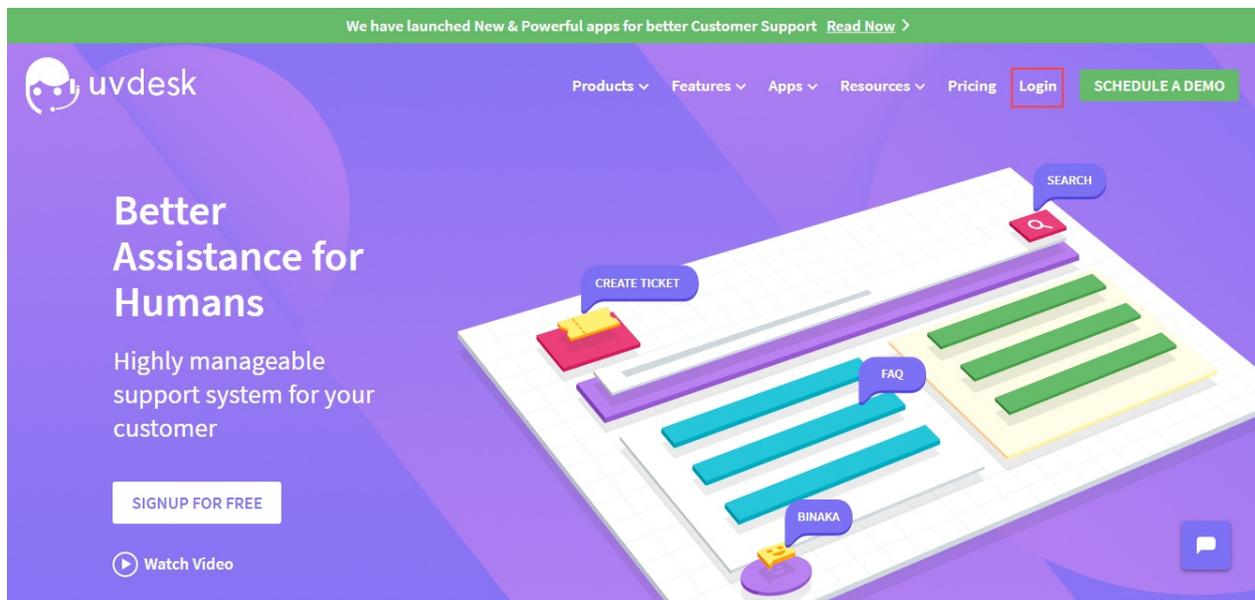
Now you can integrate UVdesk help-desk cloud Support service with your Magento.

Features

- The admin can enable or disable this module from the back-end.
- This module integrates UVdesk Helpdesk System with Magento Store.
- Only registered users are allowed to create a ticket from the front-end.
- Ticket reply to the customer can be sent either from Magento back-end or UVdesk Dashboard.
- The filter option can be used to search any specific ticket using various properties.
- A detailed information about the ticket is displayed using different labels and statuses.
- The admin and its assigned agents has an option to attach any supported file in its reply message.
- All the tickets can be managed either from Magento back-end or UVdesk Dashboard.

How to get UVdesk Access Token

In order to use this module, the admin needs to have **UVdesk Access Token**, please visit [this](#) link and login to your UVdesk account. In case you don't have a UVdesk account, you can [create a free account](#) as well.



Step 1 – Login to UVdesk Account

If you have a UVdesk account, then enter your organization's subdomain and proceed to **Step 4**.

In case you don't have an account, please click **Sign Up** and follow the below steps.



Login to your UVdesk Account

Enter the subdomain below which you have chosen at the time of registration with UVdesk

Subdomain

Organization's subdomain	.uvdesk.com
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PROCEED

I am new to UVdesk and would love to [Sign Up](#)

Step 2 – Create New Login Details

Now to create a new account with UVdesk, enter your email address, and set the password.



Create an account with **UVdesk** to assist your customers better

Create your login details

Email

Password

Confirm Password

PROCEED

Already have an account with UVdesk? [Sign In](#)

Step 3 – Choose UVdesk Subdomain

Enter your organization name and choose the subdomain name for your organization on Uvdesk.com. For example – **abc-support**. So your UVdesk address will become **https://abc-support.uvdesk.com**.

If the subdomain name is available it will be created, otherwise, you need to select different subdomain name.



Create an account with **UVdesk** to assist your customers better

Enter your Organization details

Organization Name

Choose a Subdomain for Organization

organization's subdomain	.uvdesk.com
--------------------------	-------------

SIGN UP

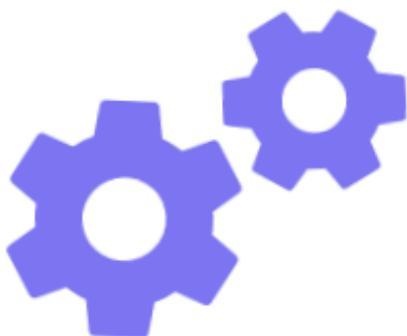
Already have an account with UVdesk? [Sign In](#)

Please wait while your account is being created.



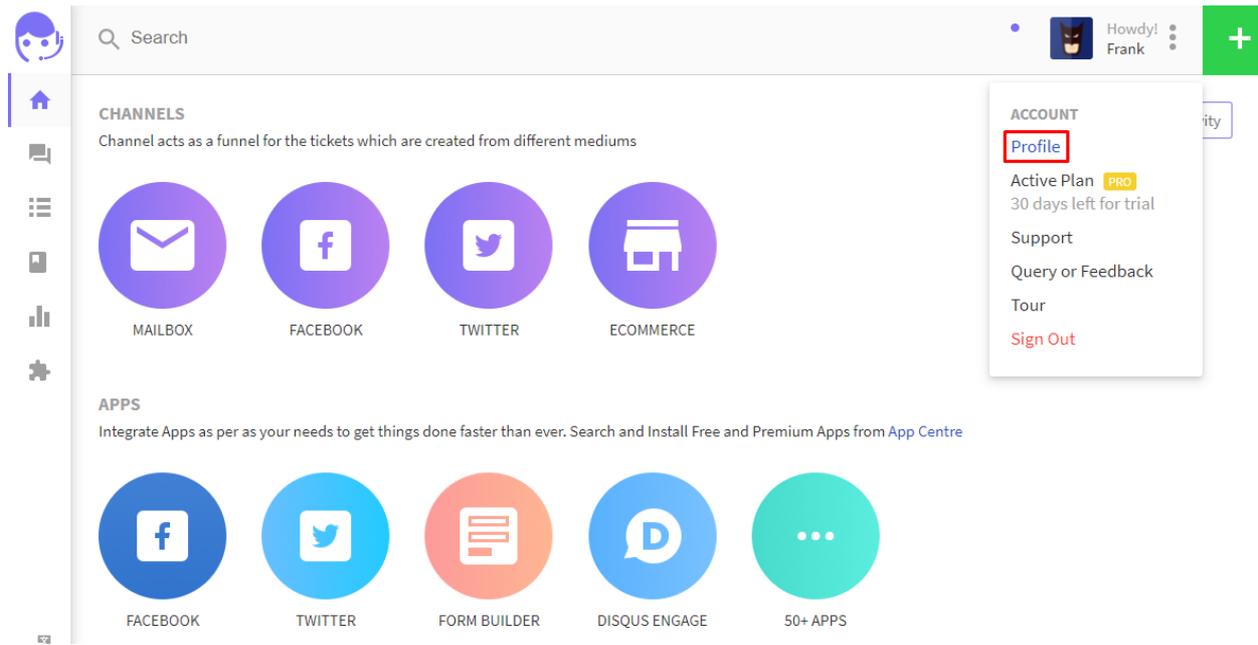
Voila! You are almost there

We are setting up an account for you, Please wait for a few seconds and you will be automatically redirected to your dashboard in a while ...



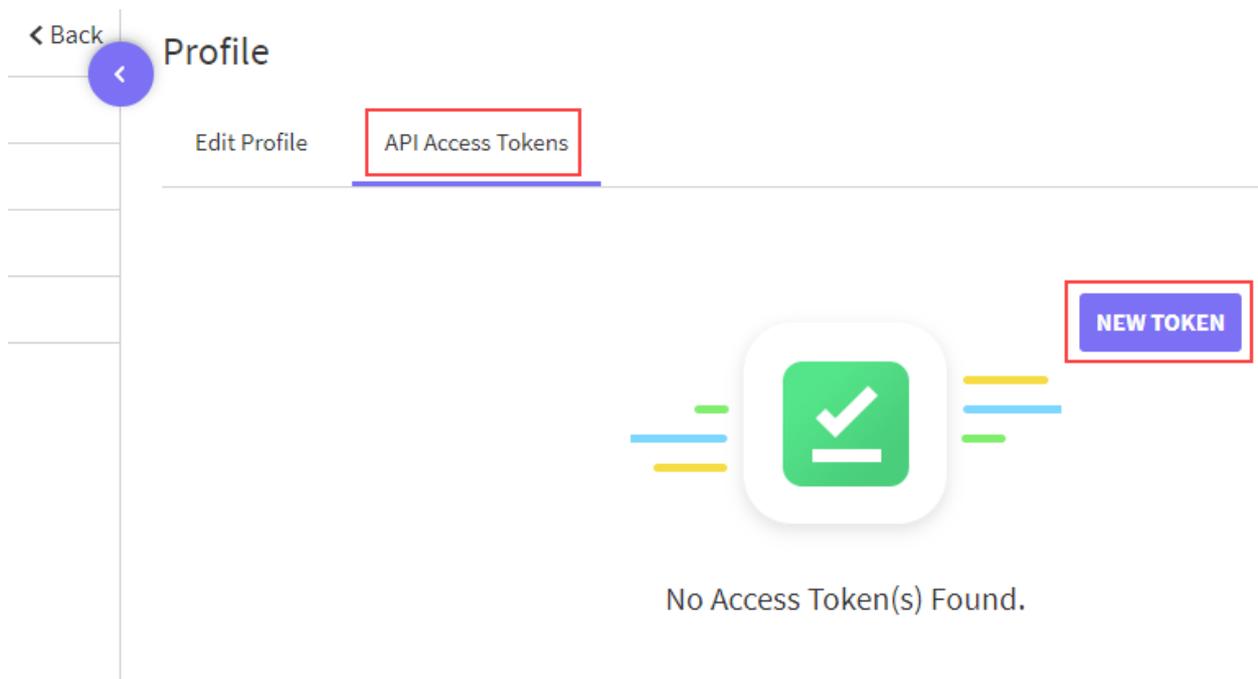
Step 4 – Go to UVdesk Dashboard

Once your UVdesk account has been created you'll be redirected to the UVdesk dashboard. Please go to **Profile** option.



Step 5 – Create New Token

Then, go to **API Access Tokens** and click **New Token** button.



Enter any name for the token and click Save Token, you're Token Key will be generated.

ACCESS TOKEN ✕

Token Name

Copy and paste the Token Key in the Magento module configuration.

[Edit Profile](#) [API Access Tokens](#)

M2 Active
Expires on: 12/12/2017, 7:45:06 PM

Module Configuration

After successfully installing this module, navigate to **Stores>Configuration>UVdesk Connector**. Here you can manage the settings of this module.

Accounts – To use this module set this option to **Enabled**. Or **Disabled**, if you don't want to use it.

Access Token – Enter the UVdesk Access Token copied from your UVdesk account.

Company Domain – Enter the Domain Name of your company. For example – abc-support

Click **Save Config** button to save your changes.

UVdesk Configuration

Accounts [store view]	Enabled	▼
	Select status of UVdesk module	
Access Token [store view]	4988E8FB79FB399672D2AA5486D758F5864224988E	
	(eg. JDO7Fdsgcvaw1mNfmzYSmfWg)	
Company Domain [store view]	abc-support	
	(eg. webkul)	

Customer Front-end View

UVdesk Tickets Panel

Now the customer can create a support ticket for their query by going to **My Account>UVdesk**. Here the customer can see all the ticket created so far. To create a new ticket the customer will simply click **Create Ticket** button.

The screenshot shows the LUMA customer front-end. At the top, there is a search bar and a shopping cart icon. Below the navigation menu (Women, Men, Gear, Training), the UVdesk Ticket List panel is visible. The panel includes a sidebar with account-related links, a main content area with a 'Ticket List' table, and a 'Create Ticket' button. The table has columns for Ticket Id, Status, Subject, Created On, Agent, and Action. A 'Submit' button is also present below the table.

Ticket Id	Status	Subject	Created On	Agent	Action
	All				Submit
218	Open	Refund money	17-Apr 04:19am	Peter Doe	View
217	Open	Product not received	16-Apr 02:21pm	Peter Doe	View
215	Open	Change my email	14-Apr 09:48am	Peter Doe	View
214	Open	Pre-sale query	14-Apr 09:46am	Peter Doe	View

Create Ticket

The customer needs to provide the following information while submitting a ticket query. First, select the Ticket Type, Enter the Subject, and Message content. The customer can also upload file attachments in the ticket.

Create Ticket



Type

Select type

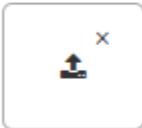


Subject

Enter Subject

Message

Brief Description about your query



+ Attach File

Submit

Reset

Email Notifications

After creating the ticket, the customer will get an email notification also.

From Me★ Reply Forward Archive Junk Delete More ▾
Subject: **A new ticket #4 has been generated by John Doe** 20:32
To Me★

Ticket generated!!

Hello John Doe,

A new ticket 4 has been generated by John Doe from test@webkul.com.
Hit on the link provided so that you can have the access to the ticket [#4](#).

Here goes the ticket message:

Hi,
I can't find white colored t-shirt on your store
Please let me know when it will be available.
Thanks!

Thanks and Regards

ABC Store

View Ticket

If some agent has sent a reply to the ticket, the customer will get the email notification and can check the ticket from My Account section.

Ticket's Thread

UVdesk #1225 Ticket Thread

Collaborators

There is no collaborator available for this ticket.

Type e-mail to add collaborator...

#1225 Need white t-shirt

Open Sales Low 1 Barry Allen

John Doe created a ticket 10-13-17 05:21pm

John Doe (test@webkul.com)

Hi,
I can't find white colored t-shirt on your store.
Please let me know when it will be available.
Thanks!

All Expanded

#695336 Barry Allen replied 10-13-17 05:26pm

Barry Allen agent

Hi John,
Thank you for your interest.
We do have a t-shirt for you, what size do you need?
Please check the image.
Thanks!



John Doe

 **+ Attach File**

Reply

Collaborator View

A customer can also add collaborators in the ticket by entering their email addresses. Collaborators can view and reply in the ticket thread.

Ticket's Thread

UVdesk #1225 Ticket Thread

Collaborators

- Jane
- aron

aron@example.com

#1225 Need white t-shirt

Open Sales Low 1 Barry Allen

John Doe created a ticket 10-13-17 05:21pm

John Doe (test@webkul.com)

Hi,
I can't find white colored t-shirt on your store.
Please let me know when it will be available.
Thanks!

Email Notification

When a customer adds a collaborator, two emails will be sent to collaborator's email address. In the first email, the collaborator will find a link for setting a password on UVdesk account. In the second email, the collaborator will find the ticket thread link.

Reply Forward Archive Junk Delete More

From mailbox <shikha.webkul@webkul.com> ☆

Subject **Mail to the collaborator** 15:40

Reply to support.issues@uvdesk.com ☆

To Me ☆

← Please add content above this line →

Hello Jane ,

You have added as a collaborator in the ticket #1225. You can check the ticket from this link [#1225](#).

Thanks and Regards

Success

This email is a service from Success. Delivered by [UVdesk](#).

Collaborator UVdesk Panel

After successfully logging in UVdesk, a collaborator can check the ticket thread and can communicate over this ticket. Any new replies sent by a collaborator will be seen by both customer and the UVdesk agent.

TICKET INFORMATION

Total Replies
← 1

Timestamp
🕒 27-Jan 01:33am

Customer
test

Agent
Peter Doe

Status
Open

Type
Support

test

Created - 27-Jan 01:33am By - John Doe Agent - Peter Doe

27-Jan 01:33am - John Doe created Ticket

John Doe
test

27-Jan 01:34am - Peter Doe replied

Peter Doe
test2

Jane

CC/BCC

Write a reply

Rich text editor toolbar: Undo, Redo, Bold, Italic, Text color, Bulleted list, Numbered list, Link, Image

Text area

Words: 0

Add Attachment

[REPLY](#) ▾

Admin Ticket Management

To manage your tickets, the admin needs to login to the backend panel and go to **UVdesk Connector>Tickets**. The admin can now see the overview of the tickets. All the tickets are labeled as **New, Unassigned, Not replied, Mine, Starred** and **Trashed**.

Tickets

demo ▾

Open	Pending	Answered	Resolved	Closed	Spam
92	10	3	1	31	0

Priority	Ticket	Customer Name	Subject	Created On	Replies	Agent	Action
Low	#163	test	test ticket	29-Jan 06:55am	3	Peter Doe	View
Low	#162	test	test	29-Jan 06:54am	0	Peter Doe	View
Low	#161	test	test	26-Jan 08:03pm	1	Peter Doe	View
Low	#160	test	ffsd fsdf	26-Jan 04:09pm	1	Peter Doe	View
Low	#88	test	https certificate	07-Jun 05:50pm	2	Peter Doe	View
Low	#158	test	test	20-Jan 03:24pm	1	Peter Doe	View

Labels

- All 105
- New 58
- Unassigned 0
- Notreplied 48
- Mine 96
- Starred 0
- Trashed 2

Filter Tickets

Assigned To

Customer

Group

Team

Ticket Status

The tickets are automatically divided according to various events as follows:

Open 596	Pending 71	Answered 41	Resolved 22	Closed 90	Spam 4
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Open – A new ticket which has arrived and not been assigned to anyone.

Pending – A new ticket which has been assigned to someone and reply is pending.

Answered – A ticket whose query has been answered and waiting for the user's reply.

Resolved – A ticket where the user is satisfied with the answer of its query.

Closed – A ticket which is complete and cannot be reopened by the user.

Spam – A ticket which is irrelevant or contains no message.

Ticket Information:

Priority – The tickets basis of their importance have four different priorities-**Urgent, High, Medium and Low**.

Ticket No. – A unique number is assigned to each and every ticket for sorting them.

Customer Name – The name of the customer/user who has created the ticket.

Subject – The subject or title of the ticket query created by the user.

Date Added – It shows the created date and time of the ticket.

Replies – Number of messages sent by the agent or the admin to the user.

Agent – The assigned person who will reply to the ticket.

Ticket Filters

As there are a huge number of tickets created by the customers, the admin can use various filters for finding specific ticket queries. The tickets can be filtered using:-

Assigned To – Find all the tickets assigned to an UVdesk agent.

Customer – Find all the tickets created by a customer.

Group – Find all the tickets of a specific group.

Team – Find tickets of a team.

Priority – Find all the tickets by priority such as high, low, medium.

Type – Find all the tickets according to their type.

Tag – Find tickets using a tag.

Mailbox – Find tickets assigned to a mailbox.

Filter Tickets

Assigned To
Enter Member name (Atleast 2 lett)

Customer
Enter Customer name (Atleast 2 le

Group
Select Group

Team
Select Team

Priority
Select Priority

Type
Select Type

Tag
Enter Tag (Atleast 2 letters)

Mailbox
Enter Mailbox

<input type="checkbox"/>	Low	#162	test	test	29-Jan 06:54am	0	Peter Doe	View
<input type="checkbox"/>	Low	#161	test	test	26-Jan 08:03pm	1	Peter Doe	View
<input type="checkbox"/>	Low	#160	test	ffsd fsdf	26-Jan 04:09pm	1	Peter Doe	View
<input type="checkbox"/>	Low	#88	test	https certificate	07-Jun 05:50pm	2	Peter Doe	View
<input type="checkbox"/>	Low	#158	test	test	20-Jan 03:24pm	1	Peter Doe	View
<input type="checkbox"/>	Low	#157	test	HI	13-Jan 06:44pm	3	Peter Doe	View
<input type="checkbox"/>	Low	#154	test	test ndj	07-Jan 09:41pm	4	Peter Doe	View
<input type="checkbox"/>	Low	#153	test	Header Missing	05-Jan 07:03am	1	Peter Doe	View
<input type="checkbox"/>	Low	#122	test	RE: hi i am looking for we developer who can fix my custom work	16-Sep 01:03pm	4	John Doe	View
<input type="checkbox"/>	High	#41	test	testing	18-Jan 11:49am	11	Peter Doe	View

Assign Agent

The admin can assign a ticket to any other agent, please click the Agent Edit icon and then select the agent name from the list. The assigned agent can then reply to the ticket.

Ticket List 🗑️

Open 598	Pending 71	Answered 41	Resolved 22	Closed 90	Spam 4
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<input type="checkbox"/>	Priority	Ticket	Customer Name	Subject	Date Added date	Replies	Agent	Action
<input type="checkbox"/>	Low	#1225	John Doe	Need white t-shirt	10-13-17 05:21pm	1	👤 Barry Allen	View
<input type="checkbox"/>	Low	#1226	John Doe	Can you make a custom-print t-shirt	10-13-17 05:23pm	0	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <input style="width: 100%;" type="text"/> <ul style="list-style-type: none"> <li style="background-color: #007bff; color: white; padding: 2px;">Barry Allen <li style="padding: 2px;">Harry Smith <li style="padding: 2px;">Jane Doe <li style="padding: 2px;">Mack Doe <li style="padding: 2px;">Steve Rogers <li style="padding: 2px;">Tom Atkins </div>	View
<input type="checkbox"/>	Urgent	#943	Mathew Patterson	Please please please can I get my money back	09-08-17 05:45pm	1		View

Reply to a Ticket

Click **View** button in the Action column to send a reply or view more information about the specific ticket. A new page will open, which will show the detailed information about the ticket. Please refer from the screenshot below. Here you can see the customer name and its email address. The agent can attach any file with the message. Click **Reply** button to send the message to the customer.

Labels

- All 105
- New 58
- Unassigned 0
- Notreplied 49
- Mine 96
- Starred 0
- Trashed 2

#1225 Need white t-shirt

Open Sales Low 0

John Doe created a ticket 10-13-17 05:21pm

John Doe (test@webkul.com)

Hi,
I can't find white colored t-shirt on your store.
Please let me know when it will be available.
Thanks!

All Expanded

+ Attach File

Reply

After sending the reply successfully to the customer, the admin will get a successful notification message on top.

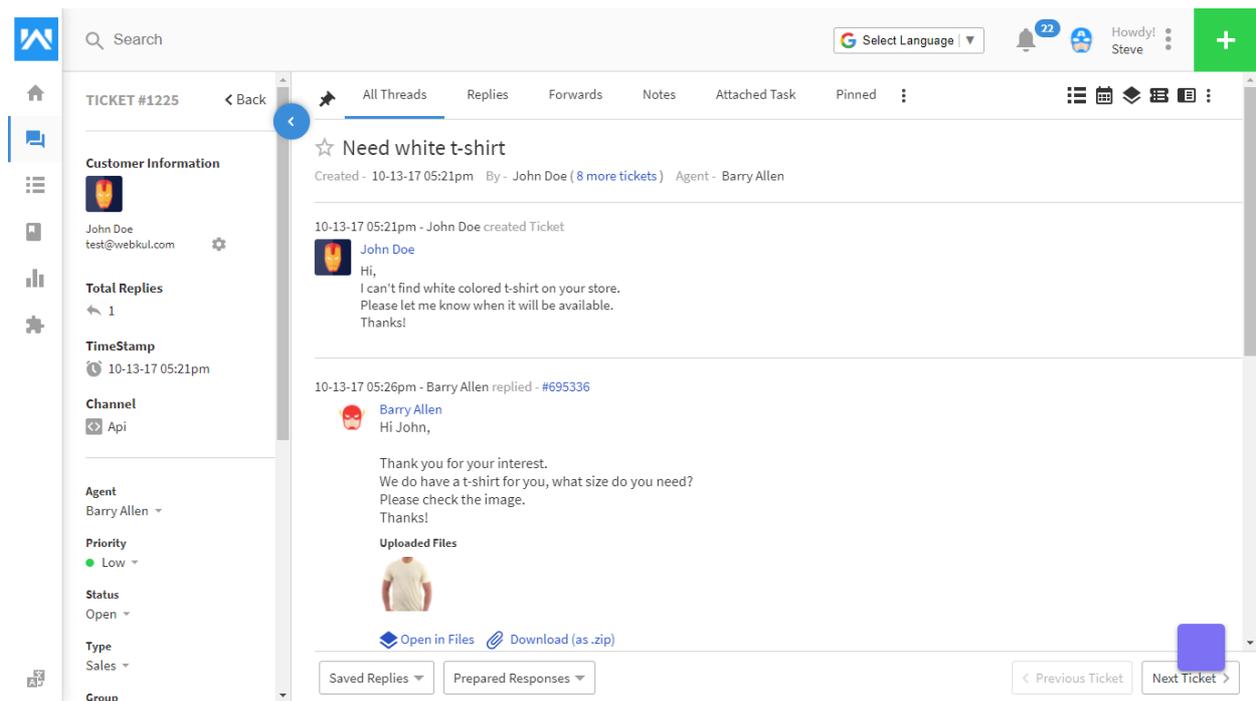
Managing Tickets from UVdesk

Once a user creates a ticket in Magento 2 store, it will be visible on the UVdesk Dashboard also. To view the tickets on UVdesk login to your UVdesk account and navigate to **Tickets** section.

ID	Subject	Customer Name	Timestamp	Replies	Agent
#1225	Need white t-shirt	John Doe	10-13-17 05:21pm	1	Barry Allen
#1226	Can you make a custom-print t-shirt	John Doe	10-13-17 05:23pm	0	Unassigned
#943	Please please please can I get my money back	Mathew Patterson	09-08-17 05:45pm	1	Unassigned
#1196	support	Rashi	10-06-17 07:28pm	0	Barry Allen
#1193	support	Rashi	10-06-17 07:06pm	0	Barry Allen
#1192	support	Rashi	10-06-17 07:05pm	0	Barry Allen

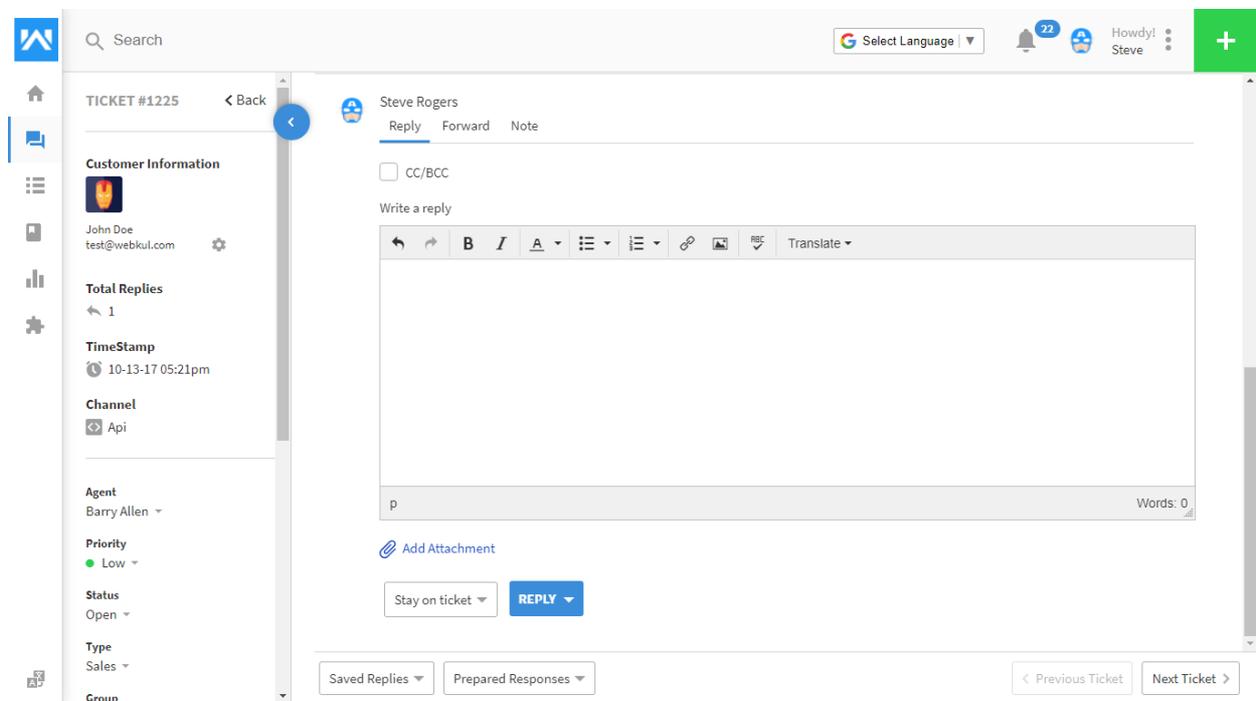
UVdesk Ticket View

The agent or the admin can also send a reply through UVdesk to its customers by clicking any of the tickets in the list. All the information about the ticket is visible on the Ticket View page.



Reply Ticket

The agent can send a reply to the customer from UVdesk. There are various options available for text formatting. File attachments is also supported.



Reply Options

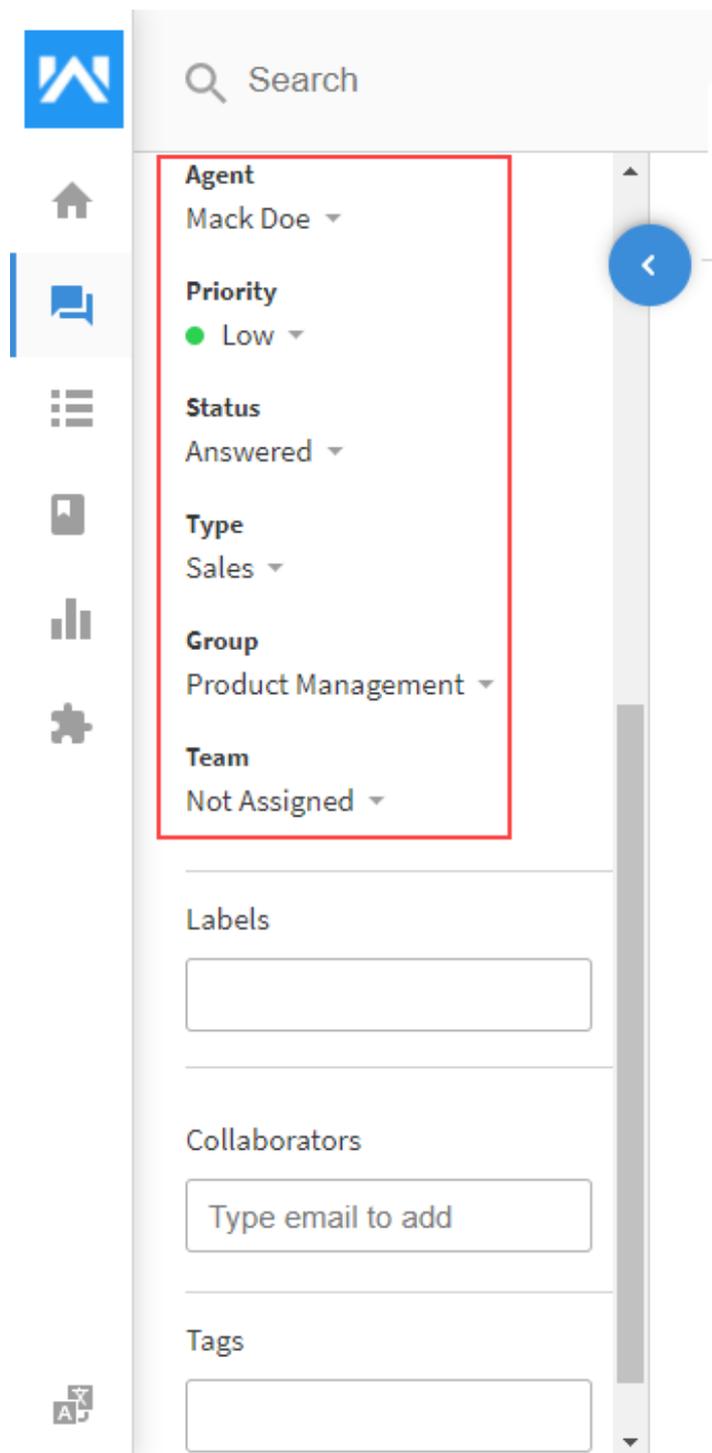
There various options available while replying the customer. When the agent sends the reply message, the status of the ticket can also be updated.

Write a reply

The screenshot shows a 'Write a reply' interface. At the top is a rich text editor toolbar with icons for undo, redo, bold (B), italic (I), text color (A), bulleted list, numbered list, link, image, and a 'Translate' dropdown. Below the toolbar is a large text input area. A dropdown menu is open over the input area, listing submission options: 'REPLY', 'Submit', 'Submit And Open', 'Submit And Pending', 'Submit And Answered', 'Submit And Resolved', and 'Submit And Closed'. The 'REPLY' option is highlighted with a red border. Below the input area is a 'p' placeholder, an 'Add Attachment' button with a paperclip icon, and a 'Stay on ticket' dropdown. At the bottom right, a blue 'REPLY' button with a dropdown arrow is highlighted with a red border.

UVdesk Ticket Management

Once the agent has opened the ticket, the agent can update the priority, status, type, group, team details for that ticket. The agent can also add tags, labels, and collaborators for the ticket.



Ticket Options

When the agent views the ticket, it can edit the ticket using Ticket options menu.

- Edit Ticket
- Print Ticket
- Mark as Spam
- Mark as Closed
- Delete Ticket

The screenshot shows a ticket management interface. At the top, there are navigation tabs: All Threads, Replies, Forwards, Notes, Attached Task, and Pinned. A red box highlights a three-dot menu icon to the right of the Pinned tab. Below the tabs, the ticket title is "Need white t-shirt" with a star icon. Below the title, it says "Created - 10-13-17 04:18pm By - John Doe (13 more tickets) Agent -". Below this, there is a message from John Doe: "Hi, I can't find white colored t-shirt on your store. Please let me know when it will be available. Thanks!". A dropdown menu is open, showing options: Edit Ticket, Print Ticket, Mark as Spam, Mark as Closed, and Delete Ticket (highlighted in red).

Thank you for viewing this blog, please share your kind views about this module on <http://webkul.uvdesk.com/>.