

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](#).

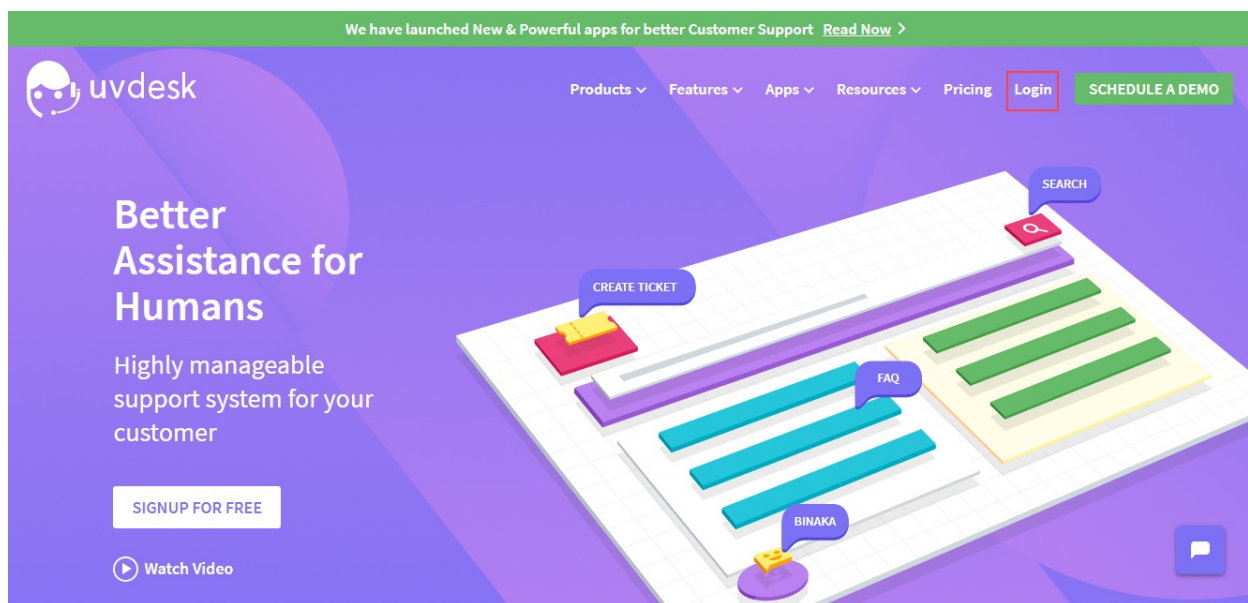
Now you can integrate UVdesk help-desk cloud Support service with your Magento.

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
--------------------------	-------------

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.



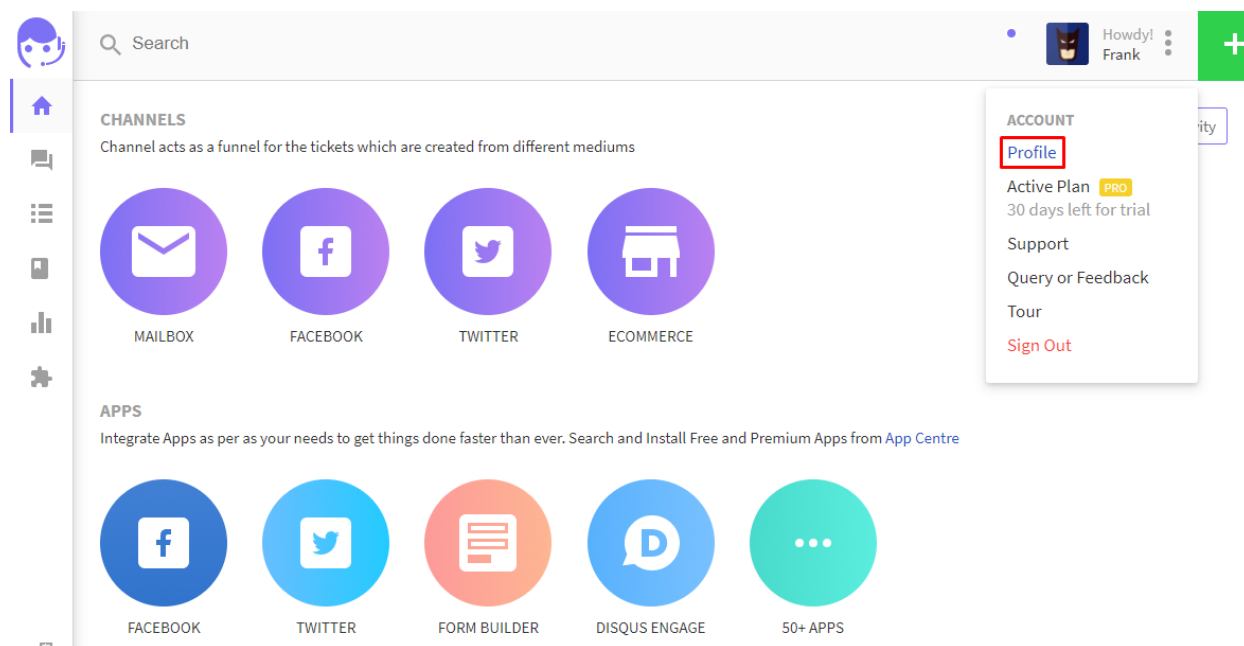
Voila! You are almost there

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 ...



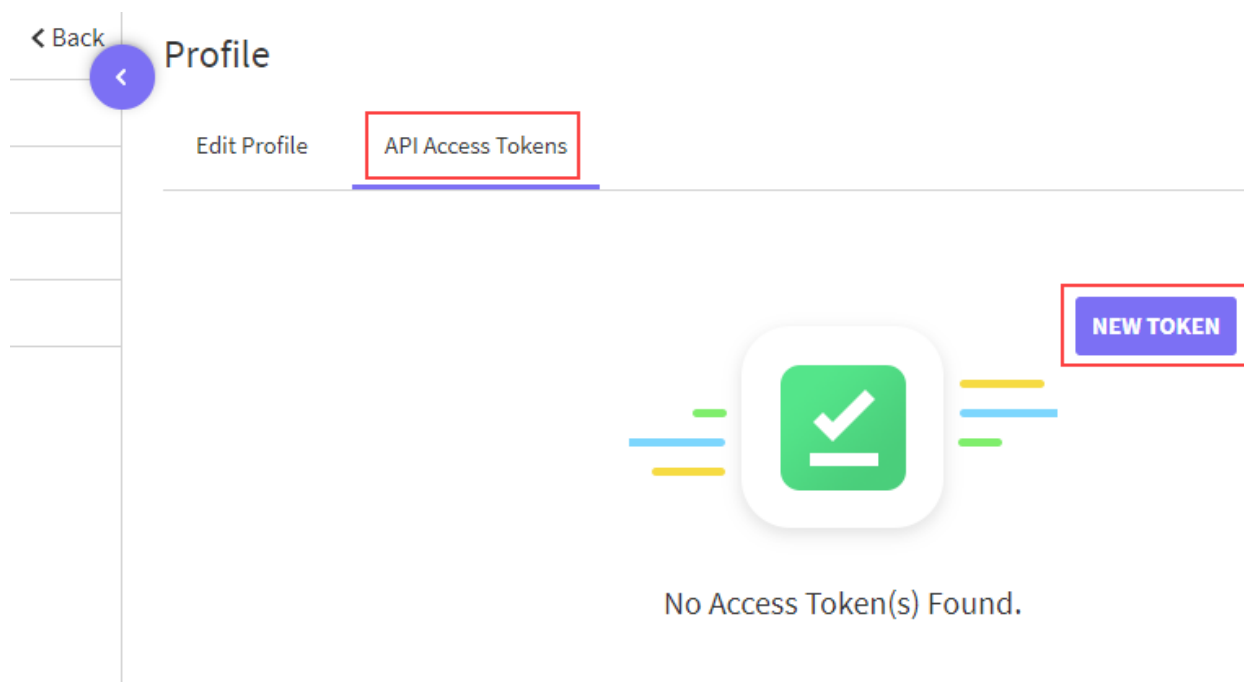
Step 4 – Go to UVdesk Dashboard

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

Enter Token Name

SAVE TOKEN

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

0A0DF0F02C4020A000C4FDDDC27E000E507700A0DF0F0

COPY

REFRESH

EDIT

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]

4968E8FB79FB399672D2AA5486D758F5864224968E

(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.

 **LUMA**

Search entire store here... 



Women Men Gear Training

Account Dashboard

My Orders

My Downloadable Products

My Wish List

Address Book

Account Information

Stored Payment Methods

Billing Agreements

My Product Reviews

Newsletter Subscriptions

UVdesk

UvDesk Ticket List

Ticket List

Sort By ▾

Create Ticket

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@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

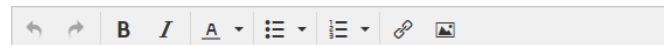
27-Jan 01:34am - Peter Doe replied


Peter Doe
test2


Jane

☐ CC/BCC

Write a reply




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**.



DASHBOARD
UVDESK CONNECTOR
SALES
CATALOG
CUSTOMERS
MARKETING
CONTENT
REPORTS
STORES

Tickets

Labels

All

105

New

58

Unassigned

0

Notreplied

48

Mine

96

Starred

0

Trashed

2

Filter Tickets

Assigned To

Enter Member name (Atleast 2 lett)

Customer

Enter Customer name (Atleast 2 le

Group

Select Group

Team

Ticket List

Open

92

Pending

10

Answered

3

Resolved

1

Closed

31

Spam

0

	Priority	Ticket	Customer Name	Subject	Created On	Replies	Agent	Action
<input type="checkbox"/>	Low	#163	test	test ticket	29-Jan 06:55am	3	Peter Doe	View
<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	tfds 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

Ticket Status

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

Open 598	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

<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> <div>Barry Allen</div> <div>Harry Smith</div> <div>Jane Doe</div> <div>Mack Doe</div> <div>Steve Rogers</div> <div>Tom Atkins</div> </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.



Search

Select Language ▾

  Howdy! Steve

























TICKETS < Back

Tickets

All 720

Sort By: Last Replied ▾ Assets Visibility ▾

Search Filter View

	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.

The screenshot shows the UVdesk interface for viewing a ticket. On the left is a sidebar with navigation icons and a list of ticket details: Customer Information (John Doe, test@webkul.com), Total Replies (1), TimeStamp (10-13-17 05:21pm), Channel (Api), Agent (Barry Allen), Priority (Low), Status (Open), Type (Sales), and Group. The main area displays the ticket title 'Need white t-shirt' and its creation details. It shows a conversation thread where John Doe created the ticket asking for a white t-shirt, and Barry Allen replied with a response and an image of a white t-shirt. At the bottom, there are buttons for 'Open in Files' and 'Download (as .zip)', and navigation links for 'Previous Ticket' and 'Next Ticket'.

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.

The screenshot shows the UVdesk interface for replying to a ticket. The left sidebar is identical to the previous screenshot. The main area shows the 'Reply' tab selected for Ticket #1225. It includes a 'Write a reply' section with a rich text editor containing a toolbar with options like bold, italic, text color, background color, bulleted list, numbered list, link, unlink, image, and translate. Below the editor is an 'Add Attachment' button. At the bottom, there is a 'Stay on ticket' dropdown and a blue 'REPLY' button. Navigation links for 'Previous Ticket' and 'Next Ticket' are also present.

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

↶

↷

B

I

A ▾

☰ ▾

☷ ▾

🔗

🖼️

ABC ✓

Translate ▾

REPLY

Submit

Submit And Open


Submit And Pending

Submit And Answered

Submit And Resolved

Submit And Closed

p

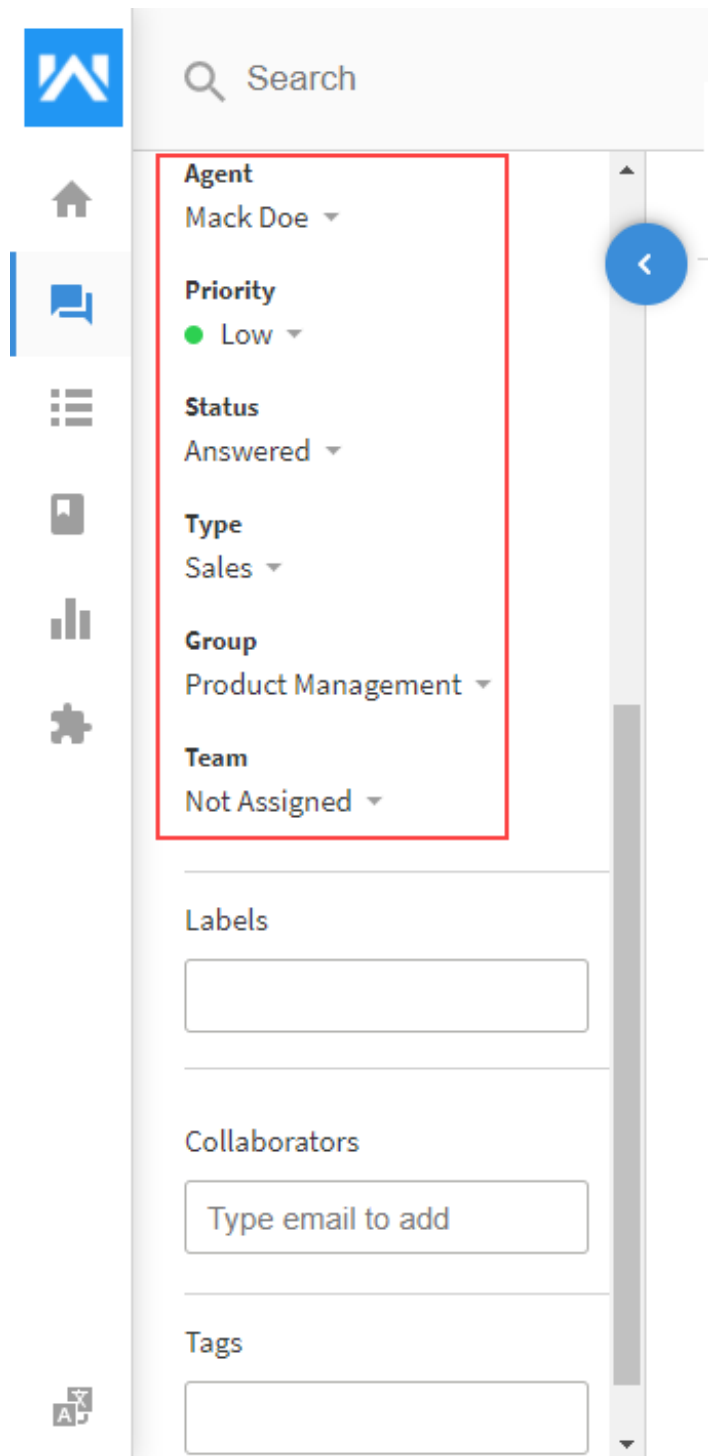
 [Add Attachment](#)

Stay on ticket ▾

REPLY ▾

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

All Threads

Replies

Forwards

Notes

Attached Task

Pinned

Need white t-shirt

Created - 10-13-17 04:18pm By - John Doe (13 more tickets) Agent -

10-13-17 04:18pm - John Doe created Ticket

John Doe

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

Edit Ticket

Print Ticket

Mark as Spam

Mark as Closed

Delete Ticket

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