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User Manual

Help Desk Extension with AI Integration

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## 1. Product Specification

The Help Desk Extension for Magento 2 is a crucial tool designed to optimize customer support processes, seamlessly integrating into the Magento platform. It provides an efficient solution for managing customer inquiries, support tickets, and communication channels, ensuring a user-friendly experience for both customers and support teams.

This extension simplifies ticket management by allowing customers to easily create, track, and prioritize support tickets. It enables the assignment of tickets to specific agents or departments, streamlining handling and resolution. With its threaded conversation view, agents can access contextual insights that enhance response quality and speed. Customers benefit from an intuitive interface within their accounts, making it easy to submit tickets and receive real-time updates on their inquiries.

The agent dashboard offers a comprehensive overview of ticket statuses, response times, and pending tasks. Agents can categorize, filter, and manage tickets efficiently to ensure effective issue resolution. Customizable response templates accelerate the resolution of common queries, while personalized email templates improve customer engagement.

In addition to ticket management, the Help Desk Extension for Magento 2 includes a streamlined working hours setup. This allows administrators to define the specific operating hours of their support team, which are clearly displayed to customers through the front-end interface. Clients can easily see when they can expect prompt assistance, while inquiries submitted outside of working hours are noted for resolution when the team is available. This transparency enhances customer satisfaction by setting clear expectations regarding support availability.

The extension also integrates advanced AI functionalities, enabling administrators to generate quick and accurate responses to customer inquiries and tickets. By leveraging AI, admins can create automated reply templates, significantly reducing response times while ensuring consistency and accuracy in communication. This integration boosts platform efficiency and enhances the overall support experience.

Additionally, the reporting and analytics features provide agents with valuable insights into ticket volumes, resolution rates, and customer satisfaction. These data-driven insights help teams continuously improve customer service. Seamlessly integrated with the Magento

architecture, the Help Desk Extension for Magento 2 is an indispensable tool for merchants aiming to elevate their customer support standards within the Magento 2 ecosystem.

**Now with full Hyvä compatibility**, the extension also ensures a modern, performance-optimized front-end experience. Merchants using the Hyvä theme can seamlessly integrate the Help Desk functionalities without compromising on speed, design, or user experience—delivering consistent support across traditional and Hyvä-powered Magento storefronts.

## 2. Installation Steps

To install the Help Desk Extension for Magento 2, follow these steps. If you are installing the extension using Composer, you can skip steps 1, 2, and 3.a.

1. Download the extension.
2. Access your web server directories, unzip the downloaded file, and upload its contents to the `app/code/Pits/HelpDesk` directory.
3. From the SSH terminal, run the following commands to complete the installation:
  - a) Install the required package:  
`composer require willdurand/email-reply-parser`
  - b) Enable the module:  
`php bin/magento module:enable Pits_HelpDesk`
  - c) Update the database schema:  
`php bin/magento setup:upgrade`
  - d) Generate and pre-compile classes:  
`php bin/magento setup:di:compile`
  - e) Deploy static files:  
`php bin/magento setup:static-content:deploy`
  - f) Clear the cache:  
`php bin/magento cache:flush`

### 3. Features

- **Multi-domain capability:** Support multiple domains within a single installation.
- **Multi-email account connections:** Connect and manage multiple email accounts.
- **AI-driven suggestions:** Get quick answers and ticket responses based on the query using AI.
- **User-friendly interface:** Clear presentation for easy collaboration among team members.
- **Comprehensive status tracking:** Display clear status information for all tickets.
- **Spam filters:** Configure filters to focus on relevant tickets only.
- **Ticket history:** Browse the full history of any ticket.
- **Custom fields:** Create custom fields to capture additional information.
- **Access control:** Manage permissions for different user roles.
- **Customer satisfaction evaluation:** Collect feedback with star ratings.
- **Operational insights:** Monitor efficiency through the helpdesk reports dashboard.
- **Unlimited scalability:** Create unlimited departments, agents, and categories.
- **Email integration:** Create and reply to tickets directly via email.
- **File attachments:** Attach files to tickets for more detailed support.
- **Ticket organization:** Set priority, status, and category for each ticket.
- **Quick actions:** Quickly reply to or close tickets.
- **Threaded conversation view:** Easily review ticket history with threaded conversations.
- **Auto-expiration and reminders:** Automate ticket expiration and set reminders.
- **Reply notifications:** Send replies not only to the ticket author but also to all relevant users.
- **Department management:** Organize your helpdesk team into departments, assign default agents, and resolve customer issues efficiently.

## 4. Features Overview

1. **Ticket Management System:** Efficiently handle customer inquiries, track their progress, assign them to the right agents or departments, and provide a comprehensive view for better context and quicker resolutions.

- **Creation and Tracking:** Customers can easily create and track support tickets within their accounts.
- **Prioritization:** Ability to prioritize tickets for urgent issues.
- **Threaded Conversation View:** Provides a contextual view for agents, aiding in faster and more accurate responses.

2. **Customer Interface:** Seamlessly integrated into customer accounts, this interface simplifies ticket submission and offers real-time updates, ensuring a hassle-free experience for users managing their inquiries.

- **User-Friendly Interface:** Integrated interface within customer accounts for seamless ticket submission and real-time updates on inquiries.
- **Convenience:** Customers can view and manage their tickets effortlessly.

3. **Agent Dashboard:** Empower agents with data-driven insights into ticket volumes, resolution rates, and customer satisfaction metrics, enabling informed decisions and continual improvement in service delivery.

- **Comprehensive Overview:** Provides agents with a dashboard displaying ticket statuses, response times, and pending tasks.
- **Categorization and Filtering:** Ability for agents to categorize and filter tickets for effective management.
- **Support Tools:** Features for agents to efficiently resolve issues, including customizable response templates and personalized email templates for enhanced customer engagement.

4. **Reporting and Analytics:** Empower agents with data-driven insights into ticket volumes, resolution rates, and customer satisfaction metrics, enabling informed decisions and continual improvement in service delivery.

- **Insightful Reports:** Reporting capabilities to track ticket volumes, resolution rates, and customer satisfaction metrics.
- **Data-Driven Insights:** Empowers agents with data to make informed decisions for continual

5. **Security and Privacy:** Ensures the utmost safety and confidentiality of customer information and ticket data, implementing robust measures to safeguard sensitive data within the system.

- **Data Security Measures:** Ensures the safety and confidentiality of customer information and ticket data.

6. **AI Integration:** Incorporates advanced AI capabilities enabling administrators to generate quick-answer templates and ticket replies. AI-driven features enhance efficiency, streamlining customer inquiries and elevating the overall support experience.

## 5. Admin Panel Configuration

Navigate to *Admin > Help Desk > Settings*.

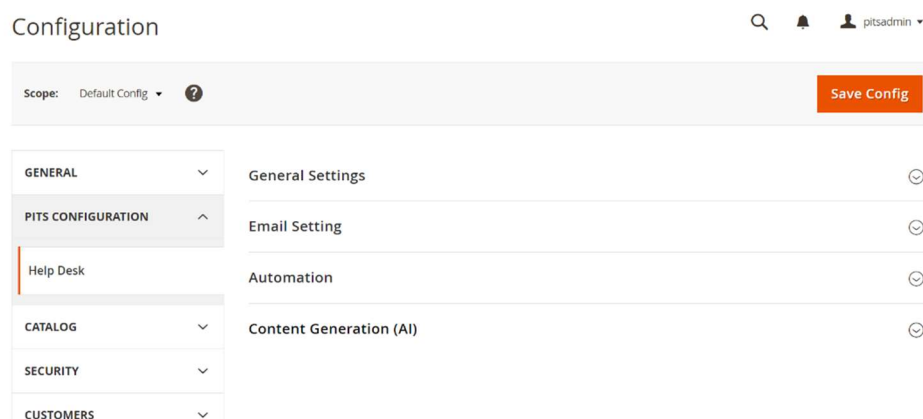


Figure 1 – Help Desk Settings – Configuration

Figure 1 displays the admin configurations of the extension, these settings are categorized into four groups, each containing specific fields.

The Groups are listed below

- **General Settings** – Controls general parameters of the extensions.
- **Email Settings** – Controls configurations for email-related features like notifications and communication preferences.
- **Automation** – Governs automated processes and workflows, enhancing operational efficiency within the extension.
- **Content Generation (AI)**– Manages the generation of content through AI-driven processes.

The **General Settings** encompass the following fields

- **Module Enable** – Enable / Disable module.
- **Additional Info Note** – Space for extra instructions or clarifications.
- **Show Spam Status in Frontend** – Display spam status prominently on the user interface.
- **Customer Can Edit Rating** – Customers can edit rating if the field is enabled.
- **Customer Can Edit Like** – Customers can edit like if the field is enabled.
- **Show Working Hours** – Exhibit designated operational hours on the user interface.
- **Add Working Hours Note Before** – Include instructions preceding the displayed working hours.
- **Working Hours** – Field to enter the working hours
- **Add Working Hours Note After** – Include instructions following the displayed working hours.

#### General Settings



Enabled

[store view]

Yes

Additional Info Note

[store view]

In publishing and graphic design, Lorem ipsum is a placeholder text commonly used to demonstrate the visual form of a document or a typeface without relying on meaningful content. Lorem ipsum may be used as a placeholder before final copy is available

This text will appear in the Frontend

Show Spam Status in Frontend

[store view]

No

When enabled, it displays the spam error and spam status in the frontend customer view.

Customer Can Edit Rating

[store view]

Yes

When enabled, customers can always edit given rating.

Customer Can Edit Like

[store view]

Yes

When enabled, customers can always like messages from agent and remove it.

Show Working Hours

[store view]

Yes

Add Working Hours Note Before

[store view]

This text will appear before the Working Hours content



Working Hours  
[store view]

Day	From	To	Action
Monday	09:00	20:00	
Tuesday	09:00	20:00	
Wednesday	09:00	20:00	
Thursday	09:00	20:00	
Friday	09:00	20:00	
<button>Add</button>			

It will show the working hours details in frontend, it may help customers to expect response time.

Add Working Hours Note After  
[store view]

Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Latin professor at Hampden-Sydney College in Virginia, looked up one of the more obscure Latin words, from a Lorem Ipsum passage, and going through the cites of the word in classical literature, discovered the

This text will appear after the Working Hours content

Figure 2 – Help Desk Settings – General Settings

The **Email Settings** encompass the following fields

- **Send Notification Email Copy To** – Specifies email addresses for receiving notifications, supporting multiple email addresses.
- **Enable Test Mode** – Allows toggling email sending functionality. When Test Mode is activated, emails will not be dispatched.
- **Email Sender** – Options to choose the identity from which emails are sent.
- **Template of New Ticket Email** – Selects the template for new ticket emails.
- **Template of New Message Email** – Selects the template for new message notification emails.
- **Template of Status Ticket Email** – Selects the template for status update emails.
- **Template of Reminder Email** – Selects the template for reminder notification emails.
- **Template of Assign Ticket** – Selects the template for assigned ticket notification emails.

## Email Settings



Send Notification Email Copy To  
[store view]

Comma-separated.

Enable Test Mode  
[store view]

No

Emails will not send while test mode enabled

Email Sender  
[store view]

General Contact

Select option for choosing the email sender identity

Template of New Ticket Email  
[store view]

New Ticket (Default)

Select option for choosing the template for new ticket emails

Template of New Message Email  
[store view]

New Message (Default)

Select option for choosing the template for new message emails

Template of Status Ticket Email  
[store view]

Status Message (Default)

Select option for choosing the template for status update emails

Template of Reminder Email  
[store view]

Ticket Reminder (Default)

Select option for choosing the template for reminder emails

Template of Assign Ticket  
[store view]

Assign Ticket (Default)

Select option for choosing the template for assigned ticket emails

Figure 3 – Help Desk Settings – Email Settings

The **Automation** encompass the following fields.

- **Enabled** – Allows toggling automation functionality.
- **Auto Close Ticket For, days** – Set the duration in days for automatic closure of tickets.
- **Completed Ticket Statuses** – Tickets with the selected statuses will be changed to closed.
- **Auto Reminder Ticket For, days** – Specify the time frame in days for automated reminder notifications to be sent.

**Enabled**  
[store view] Yes

**Auto Close Ticket For, days**  
[store view] 1  
Set the number of days to automatically close a ticket

**Completed Ticket Statuses**  
[store view]

Open  
Processing  
**Done**  
Spam  
Closed

Tickets with the selected statuses will be considered as resolved or completed.

**Auto Reminder Ticket For, days**  
[store view] 1  
Set the number of days for automated reminder notifications

Figure 4 – Help Desk Settings – Automation Settings

The **Content Generation (AI)** encompass the following fields

- **Enable Auto Content Generation** – Toggles the system's automatic content generation feature.
- **API URL** – Field for entering the URL for accessing a specific API's functionalities.
- **API Secret** – Field for entering the Unique secret key used for API authentication.

**Content Generation (AI)**

**Enable Auto Content Generation**  
[store view] Yes  
Enable/Disable use of ChatGPT to generate content.

**API URL**  
[website] https://api.openai.com/v1/chat/completions

**API Secret**  
[website]  
OpenAI Secret Key. Click [here](#) to generate the Api Secret Key.

Figure 5 – Help Desk Settings – Content Generation (AI) Settings

## 6. How It Works in Frontend

The helpdesk extension seamlessly integrates into the user's account page, offering a centralized hub for managing support queries. To access helpdesk tickets, Navigate to *Header Panel > Help Desk*. For **Hyvä theme** users, navigate to **My Account > Help Desk** to view and manage your tickets.

The Features Included in Frontend are:

- **Comprehensive Ticket Management:** Easily monitor, review, and update your support tickets from one central hub.
- **User-Friendly Support Requests:** Initiate support requests effortlessly with a clear and simple form.
- **Responsive Design:** Enjoy a consistent and responsive design across all devices.
- **Quick Helpdesk Access:** Access your support tickets with one click, whether logged in or guided through a hassle-free login process.
- **Detailed Ticket View:** Delve into specific support queries on a dedicated page, tracking progress and interactions.
- **User Feedback Rating:** Provide feedback through the rating system, actively contributing to service improvement.
- **Spam Status Enhancement:** Enabling the "Show Spam Status in Frontend" option in the general configuration provides users with a clear representation of spam status. During the submission of the ticket if it is identified as spam a message informing the same will be displayed in the frontend. Also, the ticket status will be "Spam". When this option is disabled, the ticket status will be "Processing" in the frontend even though the actual status is "Spam", which will be correctly displayed in the backend.
- **File Upload:** For security reasons, images must be in jpg, jpeg or png format and should not exceed **2.0 MB** in size while uploading from frontend.

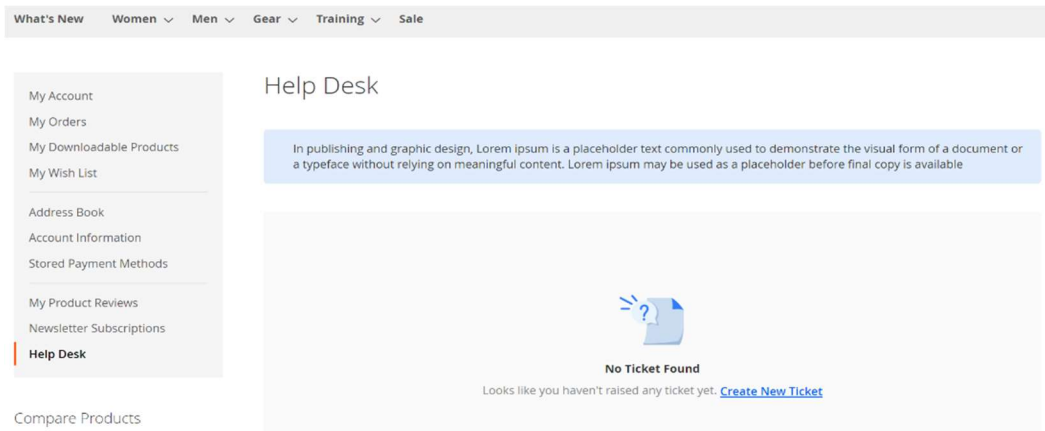


Figure 6 – Help Desk Frontend – No Tickets Found

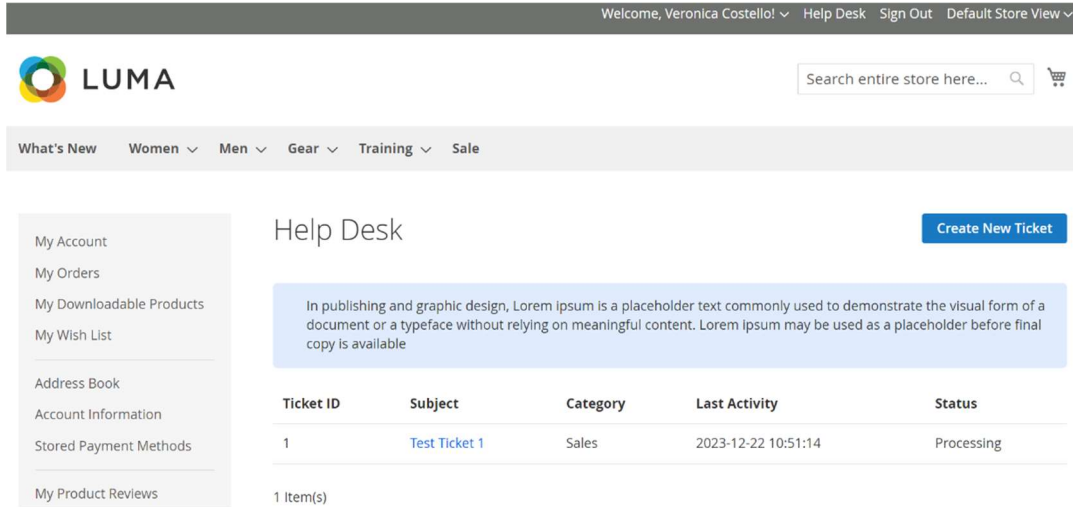
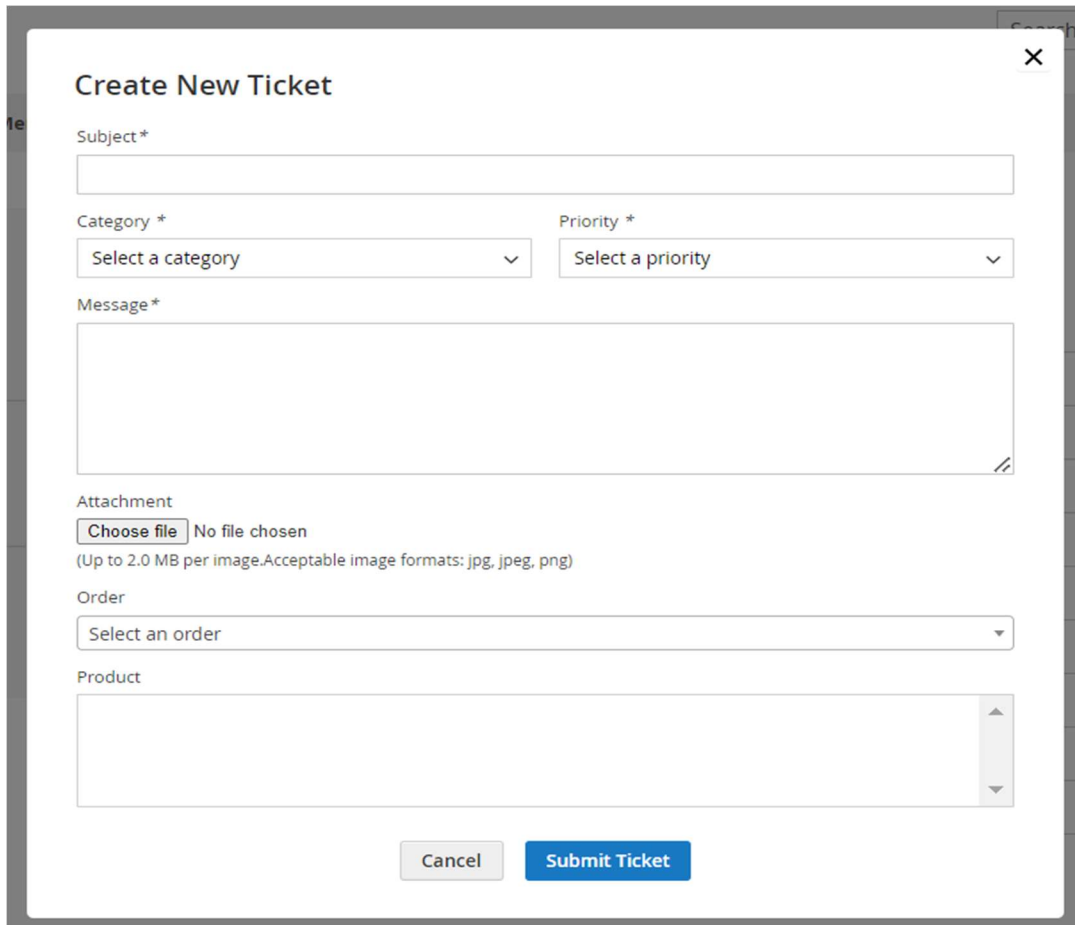


Figure 7 – Help Desk Frontend – Ticket Page



The image shows a 'Create New Ticket' form within a modal window. The form includes fields for Subject, Category, Priority, Message, Attachment, Order, and Product. The Attachment section has a 'Choose file' button and a note about file size and format. The form is styled with a clean, modern look, featuring a white background and a grey border. The 'Submit Ticket' button is highlighted in blue.

**Create New Ticket** [X]

Subject \*

Category \* Priority \*

Select a category Select a priority

Message \*

Attachment

No file chosen

(Up to 2.0 MB per image. Acceptable image formats: jpg, jpeg, png)

Order

Select an order

Product

Figure 8 – Help Desk Frontend – Ticket Creation Form

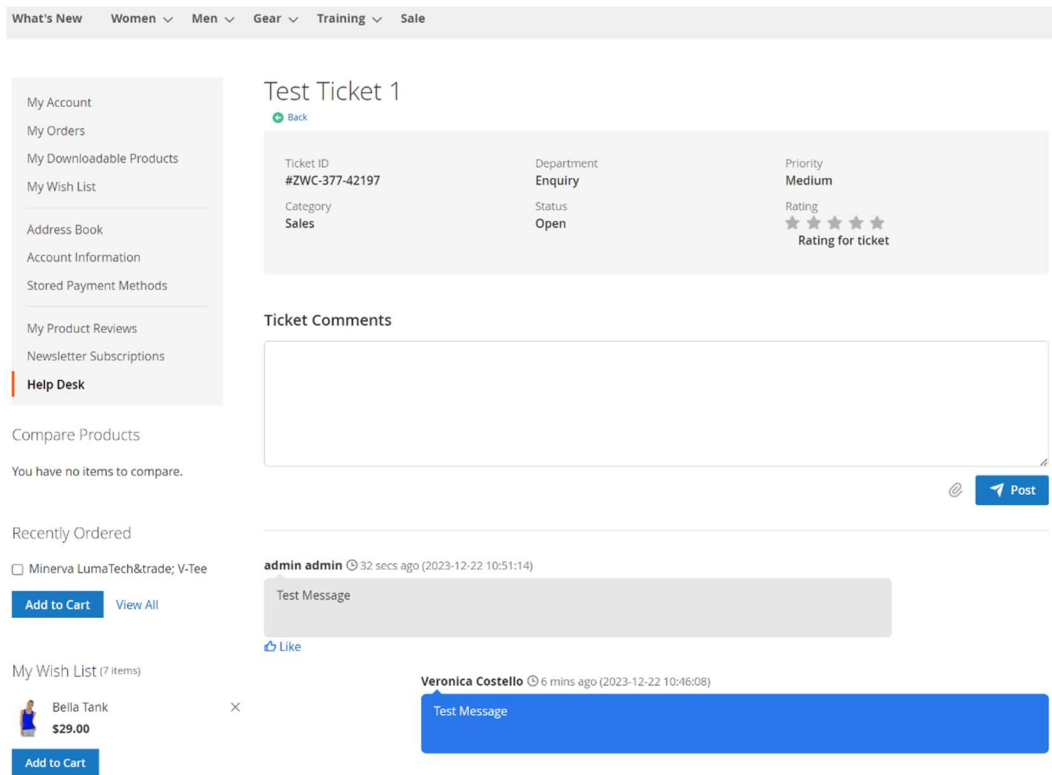


Figure 9 – Help Desk Frontend – Ticket View Page

- **Working Hours:** The working hours view can be viewed in frontend if it is enabled in configurations

## Working Hours

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

MONDAY 09:00 — 20:00	TUESDAY 09:00 — 20:00	WEDNESDAY 09:00 — 20:00	THURSDAY 09:00 — 20:00	FRIDAY 09:00 — 20:00
-------------------------	--------------------------	----------------------------	---------------------------	-------------------------

Contrary to popular belief, Lorem Ipsum is not simply random text. It has roots in a piece of classical Latin literature from 45 BC, making it over 2000 years old. Richard McClintock, a Latin professor at Hampden-Sydney College in Virginia, looked up one of the more obscure Latin words, from a Lorem Ipsum passage, and going through the cites of the word in classical literature, discovered the undoubtable source. Lorem Ipsum comes from sections 1.10.32 and 1.10.33 of "de Finibus Bonorum et Malorum" (The Extremes of Good and Evil) by Cicero, written in 45 BC. This book is a treatise on the theory of ethics, very popular during the Renaissance. The first line of Lorem Ipsum, "Lorem ipsum dolor sit amet..", comes from a line in section 1.10.32.

Figure 10 – Help Desk Frontend – Working Hours View

**Note:** The 'Create New Ticket' button will appear on the frontend only if the category and department are configured for the store views correctly by the administrator.

## 7. How It Works in Backend

Within the Magento 2 backend dashboard, the extension prominently features a dedicated menu that grants users access to various functionalities within the Helpdesk extension. This menu serves as a centralized hub, housing a range of submenus that offer distinct actions and options, catering to different aspects of the Helpdesk extension's operations.

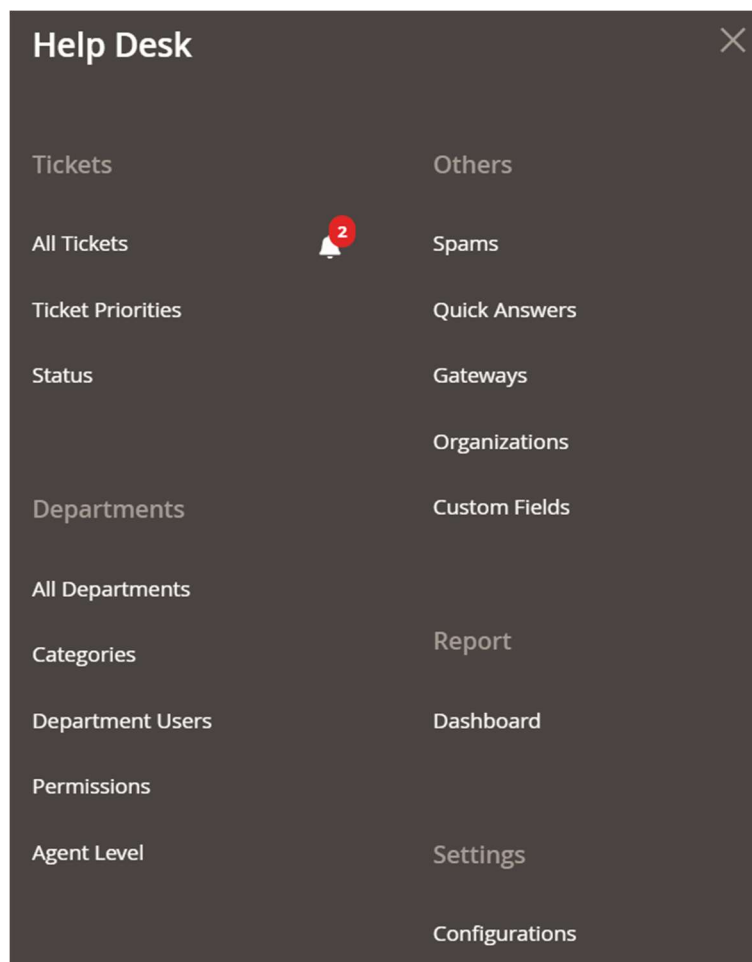


Figure 11 – Help Desk Menu



Admins need to set up specific configurations in the backend to enable a seamless Helpdesk extension experience. Once these settings are in place, users gain access to a full suite of support system features.

If categories, departments and ticket priorities haven't been added in the backend, the frontend will display a user-friendly notification, informing them that the necessary setup is pending from the administrator.

Admins can configure these settings, empowering users to effectively handle their support issues, monitor statuses, and interact efficiently with the support team. This ensures a streamlined and efficient user experience, guided by administrators' backend configurations in the Helpdesk system.

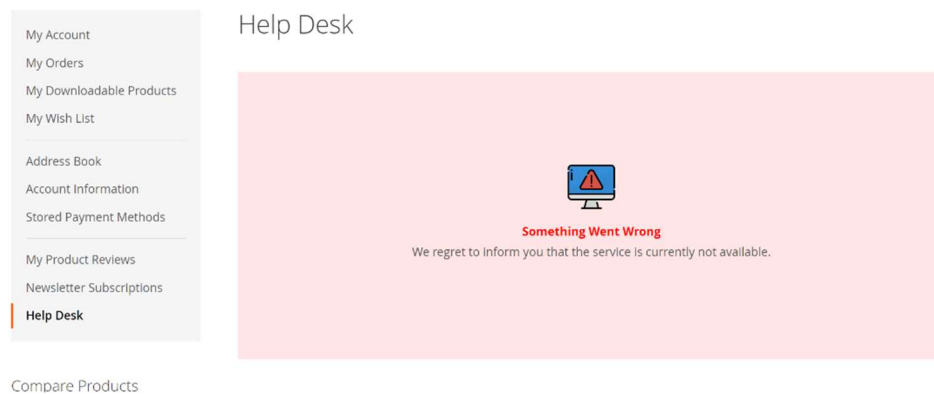


Figure 12 – Admin Setup Pending

The sub-menus included in the Help Desk extension

- **All Tickets:** Dedicated space ensuring efficient handling of customer inquiries or reported issues.
- **Ticket Priorities:** Handles the efficient creation and management of ticket priority options.
- **Status:** Handles the efficient creation and management of status options.
- **Category:** Handles with efficient creation and management of categories.
- **Department:** Handles with efficient creation and management of departments.
- **Department User:** Manages user access and permissions within specific support departments for controlled information access.
- **Permission:** Controls user access rights and privileges across various help desk sections.

- **Agent Level:** Handles the efficient creation and management of agent levels used to designate different levels of agents within the system.
- **Spam:** Automatically filters incoming emails to block spammers using specific patterns.
- **Quick Answer:** Repository for readily available solutions to common customer issues.
- **Report:** Generates comprehensive analytics for support performance and ticket resolution insights.
- **Gateway:** Automatically fetches and converts emails into tickets by connecting email accounts.
- **Organization:** Facilitates the addition and management of various organizations within the system, allowing agents to assign tickets to specific organizations for enhanced prioritization and streamlined handling.
- **Configurations:** Customizable parameters for tailoring help desk functionalities.
- **Custom Fields:** Creates and manages tailored data fields for specific business needs within support tickets.

## 8. All Tickets

The Ticket page is an interface designed for streamlined ticket management. It offers a range of functionalities for the efficient handling of ticket-related tasks.

To access the ticket, Navigate to *Admin > Help Desk > All Tickets*.

The Features included in the Ticket Menu are,

- Organizing and sorting tickets based on various parameters.
- Filtering by status, priority etc.
- Provides Mass Delete of tickets.
- Export Data in CSV or XML formats.
- The Messages tab in Ticket View Page provides threaded view for admin-user exchanges.
- The General tab in Ticket View Page displays vital customer details and user rating.
- The Additional tab on Ticket View Page includes ticket-handling agent information, ticket priority, and status for detailed context.
- The Other Tickets tab in the Ticket View Page displays the user's history, showing previous tickets from the same user.

- The Additional Data Field Tab in Ticket View Page includes the field values of the custom fields.
- Admins can prompt AI to generate replies for customer queries. If AI content generation is enabled in configurations.

HelpDesk Ticket 🔍 🔔 👤 pitsadmin

[Make All As Read](#)

[Filters](#) [Default View](#) [Columns](#) [Export](#)

Actions 1 records found 20 per page 1 of 1

	ID ↑	Ticket ID	Subject	Content	Customer Name	Last Reply	Create At	Updated At	Status	Priority	Is Read	Action
<input type="checkbox"/>	1	ZWC-377-42197	Test Ticket 1	Test Message	Veronica Costello	admin admin	Dec 22, 2023 4:46:08 AM	Dec 22, 2023 4:51:14 AM	Processing	Medium	Read	<a href="#">Select</a>

Figure 13 – Help Desk Ticket – Ticket Listing Page

ZCJ-701-09090 🔍 🔔 👤 pitsadmin1

[← Back](#) [Save and Continue Edit](#) [Save](#)

TICKET INFORMATION

Messages

General

Additional

Other Ticket

Additional Data Fields

Messages

Attachment [Upload](#)  
Allowed file types: jpg, jpeg, png

Message

[Generate AI Content](#)

Quick Answer [Choose Quick Answer](#)


pits admin added 8 secs ago (2024-01-10 18:06:43)  
Test Message

Veronica Costello added 2 mins ago (2024-01-10 18:04:51)  
[Test Message](#)  
[Like](#)

Figure 14 – Help Desk Ticket – Ticket View Page

TICKET INFORMATION

Messages

General 

Additional

Other Ticket

Additional Data Fields

General

Customer Id

Customer Email \*

Customer Name \*

Customer Rating

Order

Product 

Fusion Backpack

Category \*

Departments \*

Figure 15 – Help Desk Ticket – Ticket View Page – General

TICKET INFORMATION

Messages  
General  
**Additional**  
Other Ticket  
Additional Data Fields

Additional

Subject \*

Test Ticket 1

Description

Test Message

Store \*

Default Store View

User Id

1

User Name

admin admin

User Email

helpdesk@yopmail.com

Organization

-- Please Select --

Priority \*

Low

Active \*

Processing

Figure 16 – Help Desk Ticket – Ticket View Page – Additional

TICKET INFORMATION

Messages  
General  
Additional  
**Other Ticket**  
Additional Data Fields

Other Ticket

Default View
Columns

2 records found
20 per page
1 of 1

ID	Subject	Status	Priority	Action
2	Test Ticket 2	Open	Medium	Select
3	Test Ticket 3	Processing	Low	Select

Figure 17 – Help Desk Ticket – Ticket View Page – Other Ticket

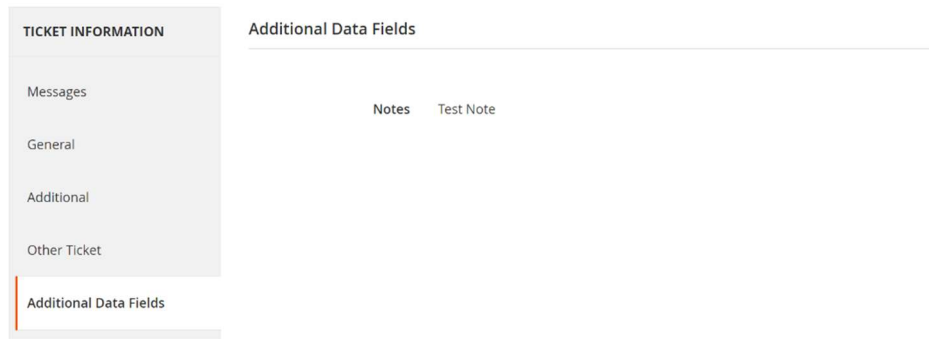


Figure 18 – Help Desk Ticket – Ticket View Page – Additional Data Fields

## Generation of AI Content

- Click "Generate AI Content."
- Enter a prompt in the popup.
- Click "Generate" to create content.
- Review and edit the generated content if needed.
- Click "Apply" to transfer content to the message field.

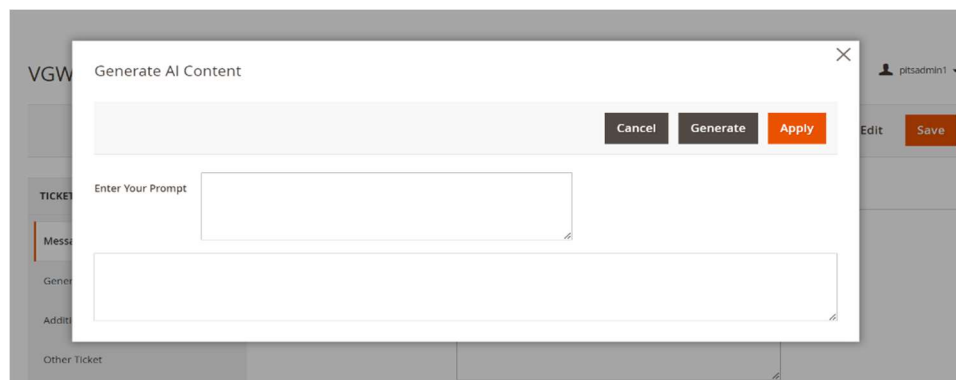


Figure 19 – Help Desk Ticket – AI Content Generation

## 9. Ticket Priorities

The Ticket Priority page is designed for streamlined priority management.

The fields included in the Ticket Priorities

- **Priority Code:** The unique identifier for the entity within the system which cannot be editable.
- **Active:** Toggle the priority visibility.
- **Priority Label:** Default descriptive name or label of the priority.
- **Store View Specific Label:** Store specific descriptive name or label of the priority.

### Steps to create a ticket priority

- Navigate to *Admin > Help Desk > Ticket Priorities*.
- Click on 'Add New Priority' button.
- Fill in the details for the ticket priority.
- Save the form to create the ticket priority.

Add Priority

pitsadmin

← Back
Save

General

Priority Code \*

Enter the code for the priority.

Active \*
Yes

Enter whether the priority is active or not.

Priority Label \*

Enter the default label of the priority.

Store View Specific Label ?

Main Website

Main Website Store

Default Store View

de\_store

fr\_store

Figure 20 – Help Desk Ticket Priorities- New Priority Page

Priority Options

pitsadmin

Add New Priority

Filters
Default View
Columns

2 records found

20 per page

1 of 1

Priority Id	Priority Code	Created At	Action
1	low	2024-02-08 06:49:59	<a href="#">Edit</a>
2	high	2024-02-08 08:16:41	<a href="#">Edit</a>

Figure 21 – Help Desk Ticket Priorities – Priorities Listing Page

← Back
Save

General

Active \*
Yes

Enter whether the priority is active or not.

Priority Label \*
Low

Enter the default label of the priority.

Store View Specific Label ?

Main Website

Main Website Store

Default Store View
Low

de\_store
Niedrig

fr\_store
Faible

Figure 22 – Help Desk Ticket Priorities – Priority Edit Page



### Steps to edit a ticket priority

- Navigate to *Admin > Help Desk > Ticket Priorities*.
- Select the ticket priority you want to edit.
- Click "Edit" in the Action column.
- Edit and update the ticket priority details in this view.

## 10. Status

The Status is designed for streamlined status management.

The fields included in the Status

- **Status Code:** The unique identifier for the entity within the system which cannot be editable.
- **Status:** Toggle the status visibility.
- **Status Label:** Default descriptive name or label of the status.
- **Store View Specific Label:** Store specific descriptive name or label of the status.

### Steps to create a status

- Navigate to *Admin > Help Desk > Status*.
- Click on 'Add New Status' button.
- Fill in the details for the status.
- Save the form to create the status.

Add Status
🔍
🔔
👤 pitsadmin

← Back
Save

General

Status Code \*
Enter the code for the status.

Status \*

Yes

Enter whether the status is active or not.

Status Label \*
Enter the default label of the status.

Store View Specific Label ?

Main Website

Main Website Store

Default Store View

de\_store

fr\_store

Figure 23 – Help Desk Status - New Status Page

Status Options
🔍
🔔
👤 pitsadmin

Add new status

Filters
Default View
Columns

5 records found

20
per page
1
of 1

Status Id	Status Code	Status	Created At	Action
1	open	Enabled	2024-02-12 12:45:07	<a href="#">Edit</a>
2	processing	Enabled	2024-02-12 12:45:07	<a href="#">Edit</a>
3	done	Enabled	2024-02-12 12:45:07	<a href="#">Edit</a>
4	spam	Enabled	2024-02-12 12:45:07	<a href="#">Edit</a>
5	closed	Enabled	2024-02-12 12:45:07	<a href="#">Edit</a>

Figure 24 – Help Desk Status – Status Listing Page

[← Back](#)
[Save](#)

---

General

Active \* ☐ Yes ☐ No  
Enter whether the priority is active or not.

Priority Label \*   
Enter the default label of the priority.

Store View Specific Label ?

Main Website	Default Store View
Main Website Store	<input type="text" value="Low"/>
de_store	<input type="text" value="Niedrig"/>
fr_store	<input type="text" value="Faible"/>

Figure 25 – Help Desk Status – Status View Page

### Steps to edit a ticket priority

- Navigate to *Admin > Help Desk > Status*.
- Select the status you want to edit.
- Click "Edit" in the Action column.
- Edit and update the status details in this view.

## 11. Category

The Category page is designed for streamlined category management.

The fields included in the Category

- **Title:** Descriptive name or label of the category.
- **Store View:** Option to choose stores in which the category is displayed.
- **Status:** Toggle the category visibility.
- **Position:** The placement of the category within its display sequence.

## Steps to create a category

- Navigate to *Admin > Help Desk > Categories*.
- Click on 'Add New Category' button.
- Fill in the details for the category.
- Save the form to create the category.

HelpDesk Category 🔍 🔔 👤 pitsadmin

[Add New Category](#)

Search by keyword 🔍

Filters 👁 Default View ⚙ Columns

Actions ▼ 3 records found 20 per page < 1 of 1 >

<input type="checkbox"/>	ID ↓	Title	Status	Position	Store View	Created	Modified	Action
<input type="checkbox"/>	1	Sales	Enabled	0	All Store Views	Dec 12, 2023 1:55:16 AM	Dec 12, 2023 1:55:16 AM	<a href="#">Select</a>
<input type="checkbox"/>	2	Payment	Enabled	0	All Store Views	Dec 12, 2023 1:55:35 AM	Dec 12, 2023 1:55:35 AM	<a href="#">Select</a>
<input type="checkbox"/>	3	General	Enabled	0	All Store Views	Dec 12, 2023 1:56:27 AM	Dec 12, 2023 1:56:27 AM	<a href="#">Select</a>

Figure 26 – Help Desk Category - Category Listing Page

## Steps to edit a category

- Navigate to *Admin > Help Desk > Categories*.
- Select the category you want to edit.
- Click "View" in the Action column.
- Edit and update the category details in this view.

New Category 🔍 🔔 👤 pitsadmin

← Back Save

General

Title \*   
Enter Title of the Category.

Store Id \* 

All Store Views

Main Website

Main Website Store

Default Store View

de\_store

  
Select store views for the category.

Status \* Yes ▼  
Select whether the Category is active or not.

Position

Figure 27 – Help Desk Category - New Category Page

Sales 🔍 🔔 👤 pitsadmin

← Back Delete Save and Continue Edit Save

General

Title \* Sales  
Enter Title of the Category.

Store Id \* 

All Store Views

Main Website

Main Website Store

Default Store View

de\_store

  
Select store views for the category.

Status \* Yes ▼  
Select whether the Category is active or not.

Position

Figure 28 – Help Desk Category – Category View Page

## 12. Department

The Department page serves as a centralized hub for efficient departmental management within the system.

The fields included in the Department

- **Title:** Descriptive name or label of the department.
- **Category:** Organizes departments into specific groups for better classification and management.
- **Members of Department:** Assigns users to their corresponding departments, streamlining administrative oversight and coordination.
- **Store View:** Option to choose stores in which the department is displayed.
- **Status:** Toggle the department visibility.
- **Position:** The placement of the category within its display sequence.

### Steps to create a department

- Navigate to *Admin > Help Desk > Departments*.
- Click on 'Add New Department' button.
- Fill in the details for the department.
- Save the form to create the department.

**Note:** Categories selected in one department will not be visible in other departments.

## New Department



 pitsadmin

[← Back](#)
[Save](#)

## General

Title \*

Enter Title of the Department.

Store Id \* 

All Store Views

Main Website

Main Website Store

Default Store View

de\_store

Select store views for the Department.

Category \* 

Sales

Select categories for this department.

Members of Department \* 

admin admin

Select members for this department.

Status \* 

Yes

▼

Select whether the Department is active or not.

Position

Figure 29 – Help Desk Department – New Department Page

HelpDesk Department

pitsadmin

Add New Department

Search by keyword

Filters

Default View

Columns

Actions

2 records found

20 per page

1 of 1

	ID	Title	Status	Position	Store View	Created	Modified	Action
<input type="checkbox"/>	1	Order	Enabled	0	All Store Views	Dec 12, 2023 1:58:37 AM	Dec 12, 2023 1:58:37 AM	Select
<input type="checkbox"/>	2	Enquiry	Enabled	0	All Store Views	Dec 12, 2023 1:59:05 AM	Dec 12, 2023 1:59:05 AM	Select

Figure 30 – Help Desk Department- Department Listing Page

Order

pitsadmin

Back

Delete

Save and Continue Edit

Save

General

Title \*

Order

Enter Title of the Department.

Store Id \*

All Store Views

Main Website

Main Website Store

Default Store View

de\_store

Select store views for the Department.

Category \*

Sales

Select categories for this department.

Members of Department \*

admin admin

Select members for this department.

Status \*

Yes

Select whether the Department is active or not.

Position

0

Figure 31 – Help Desk Department – Department view Page



## Steps to edit a department

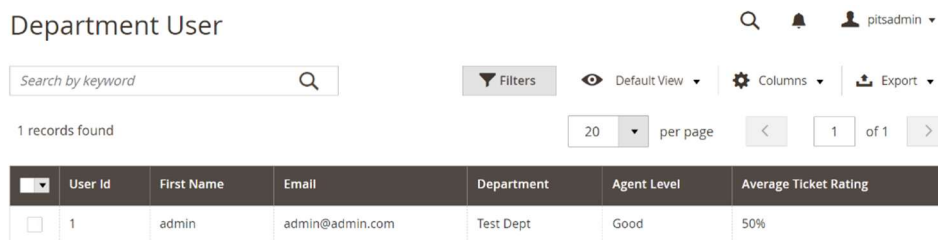
- Navigate to *Admin > Help Desk > Departments*.
- Select the department you want to edit.
- Click "View" in the Action column.
- Edit and update the department details in this view.

## 13. Department User

The department user interface displays a comprehensive list of agents along with their respective departments. A department user is automatically generated upon the inclusion of an agent as a member of that department.

- Presents the average ratings received by each agent.
- Admins have the capability to edit the agent level within this interface.
- Supports consolidated report generation.

To see the list of department users, Navigate to *Admin > Help Desk > Department Users*.



<input type="checkbox"/>	User Id	First Name	Email	Department	Agent Level	Average Ticket Rating
<input type="checkbox"/>	1	admin	admin@admin.com	Test Dept	Good	50%

Figure 32 – Help Desk Department User - Department User Listing Page

## 14. Permission

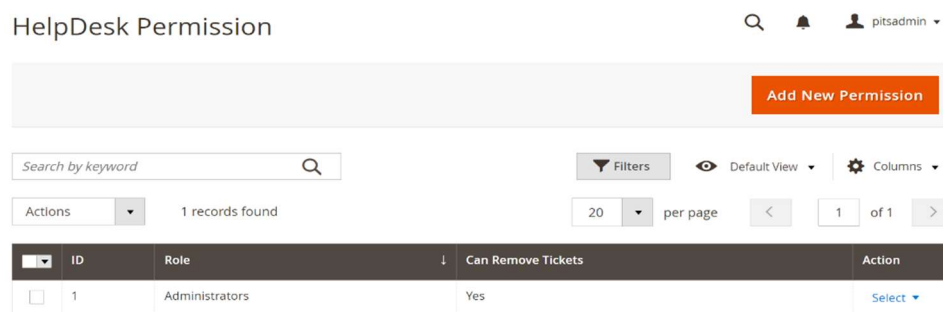
The permission page is a hub for administrators to oversee and organize permissions within the system.

The fields included in the Permission.

- **Role:** Determines system authority by specifying user roles within the helpdesk system.
- **Access to tickets of departments:** Streamlines ticket management by enabling the assignment of specific departments to the selected roles.
- **Can Delete Tickets:** Empowers administrators to control ticket deletion privileges for the assigned role.

### Steps to create a permission

- Navigate to *Admin > Help Desk > Permissions* for accessing the page.
- Click on 'Add New Permission' button.
- Fill in the details for the permission.
- Save the form to create the permission.



The screenshot shows the 'HelpDesk Permission' interface. At the top right, there are icons for search, notifications, and a user profile labeled 'pitsadmin'. Below this is a light gray bar with an orange 'Add New Permission' button. A search bar with the placeholder 'Search by keyword' is on the left. To the right of the search bar are buttons for 'Filters', 'Default View', and 'Columns'. Below these is a table with one record. The table has columns for 'ID', 'Role', 'Can Remove Tickets', and 'Action'. The first row shows ID '1', Role 'Administrators', Can Remove Tickets 'Yes', and an 'Action' dropdown menu.

ID	Role	Can Remove Tickets	Action
1	Administrators	Yes	Select

Figure 33 – Help Desk Permission - Permission Listing Page

New Permission

pitsadmin

← Back

Save

General

Role \*

Administrators

Select the role for granting permission.

Access to tickets of departments \*

Order

Select departments for selected role for ticket handling purposes (multiple selections allowed).

Can Delete Tickets \*

Yes

Choose whether role with this permission can delete tickets.

Figure 34 – Help Desk Permission – New Permission Page

Edit Permission

pitsadmin

← Back

Delete

Save and Continue Edit

Save

General

Role \*

Administrators

Select the role for granting permission.

Access to tickets of departments \*

Order

Select departments for selected role for ticket handling purposes (multiple selections allowed).

Can Delete Tickets \*

Yes

Choose whether role with this permission can delete tickets.

Figure 35 – Help Desk Permission – Permission Edit Page

## Steps to edit a permission

- Navigate to *Admin > Help Desk > Permissions*.
- Select the permission you want to edit.

- Click "View" in the Action column.
- Edit and update the permission details in this view.

## 15. Manage User Role

- Go to *Admin > System > User Roles*

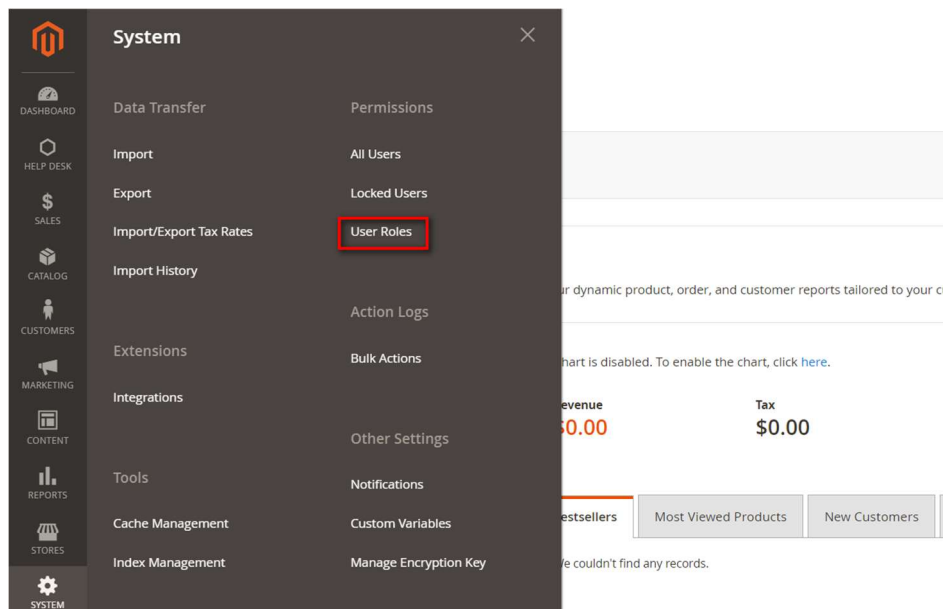


Figure 36 – User Roles

- Add a new role resource. Fill in the role information section.

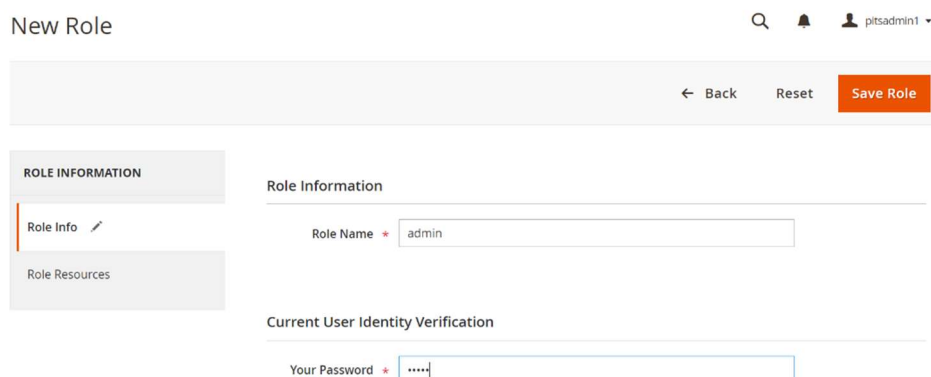

 A screenshot of the 'New Role' form. The form has a header with 'New Role' and a search icon. Below the header are 'Back', 'Reset', and 'Save Role' buttons. The 'Role Information' section is active, showing a 'Role Name' field with the value 'admin'. Below this is the 'Current User Identity Verification' section, which has a 'Your Password' field with a masked password '\*\*\*\*'.

Figure 37 – Role Information

- Select **Help Desk role** at Role Resources section.

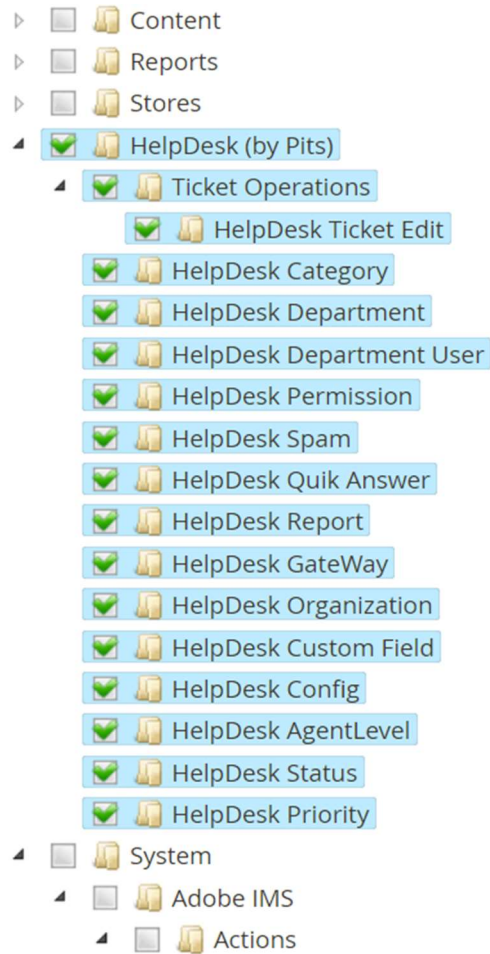


Figure 38 – Help Desk Roles

- Set role users for admin accounts, then click on **Save Role** to finish.

## 16. Agent Level

The agent level menu in helpdesk system serves as a centralized hub for displaying all added agent levels.

The fields included in the Agent Level.

- **Agent Level:** The name or label of the agent level.
- **Status:** Toggle the visibility of agent level.

### Steps to create an agent level

- Navigate to *Admin > Help Desk > Agent Level*.
- Click on 'Add New Agent Level' button.
- Fill in the details for the agent level.
- Save the form to create the agent level.



HelpDesk Agent Level

Search by keyword

1 records found

ID	Agent Level	Status	Action
1	Good	Enabled	<a href="#">View</a>

Add New Agent Level

Figure 39 – Help Desk Agent Level- Agent Level Listing Page



New Agent Level

← Back Save

General

Agent Level \*

Enter agent level.

Status \* Yes

Select whether the agent level is active or not.

Figure 40 – Help Desk Agent Level – New Agent Level Page

## Steps to edit an agent level

- Navigate to *Admin > Help Desk > Agent Level*.
- Select the agent level you want to edit.
- Click "View" in the Action column.
- Edit and update the agent level details in this view.




Figure 41 – Help Desk Agent Level – Agent Level View Page

## 17. Spam

The spam page in the helpdesk system serves as a centralized hub displaying all added spams, streamlining the process of managing and organizing them.

The fields included in the Spam

- **Name:** Labels configurations for easy identification within the system.
- **Pattern:** Inputs specific indicators of spam with formatting guidance.
- **Scope:** Allows selection of email segments for focused spam scrutiny.
- **Status:** Toggle the spam visibility.

## Steps to create a spam

- Navigate to *Admin > Help Desk > Spams*.
- Click on 'Add New Spam' button.
- Fill in the details for the spam.
- Save the form to create the spam.

HelpDesk Spams 🔍 🔔 👤 pitsadmin

[Add New Spam](#)

Search by keyword 🔍

Filters 👁 Default View ⚙ Columns

Actions ▼ 1 records found 20 per page < 1 of 1 >

<input type="checkbox"/>	ID	Name	Pattern	Scope	Action	Status
<input type="checkbox"/>	1	general	/special proposal/i	subject	<a href="#">Select</a>	Enabled

Figure 42 – Help Desk Spam- Spam Listing Page

New Spam 🔍 🔔 👤 pitsadmin

[← Back](#) [Save](#)

General

Name \*

Pattern \*

Enter the pattern of spam. For example: /special proposal/i

Scope \* Headers ▼

Select the scope to check for spam.

Status \* Yes ▼

Figure 43 – Help Desk Spam- New Spam Page



## Steps to edit a spam

- Navigate to *Admin > Help Desk > Spams*.
- Select the spam you want to edit.
- Click "View" in the Action column.
- Edit and update the spam details in this view.

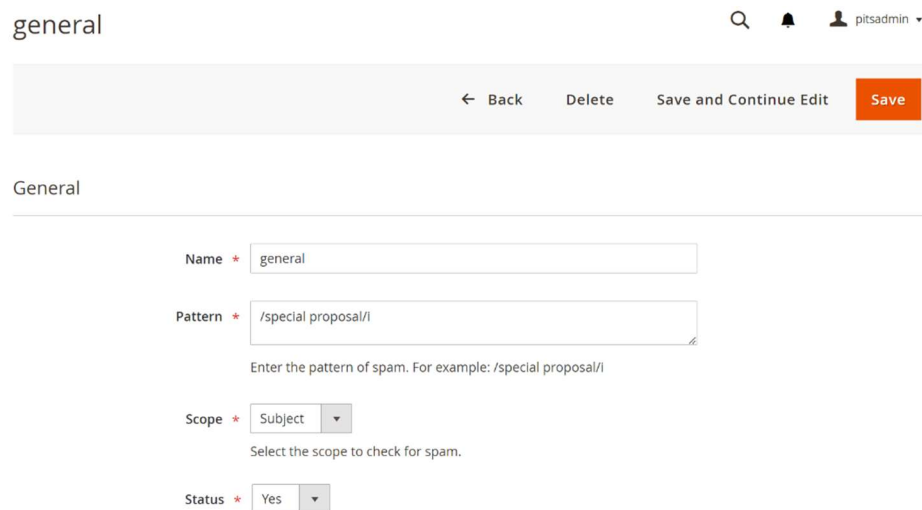


Figure 44 – Help Desk Spam- Spam View Page

## 18. Quick Answer

The Quick Answer feature streamlines communication management within the system by providing administrators with a comprehensive interface to oversee, organize, and modify a list of quick responses. This tool empowers efficient handling of inquiries by allowing the addition, editing, and activation of predefined responses, ensuring prompt and accurate support for users.

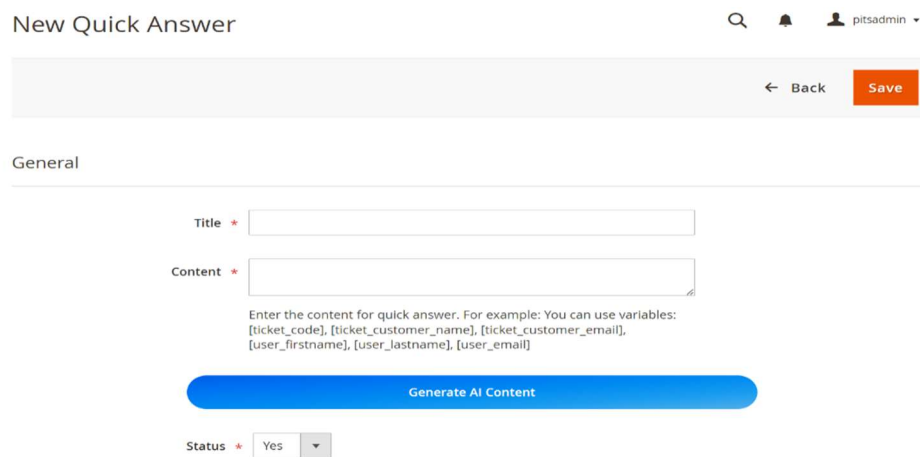
The fields included in the Quick Answer

- **Title:** Descriptive name or label of the Quick Answer.
- **Content:** Inputs specific content for Quick Answer.
- **Status:** Toggle the Quick Answer visibility.

- **Generate AI Content:** Generates AI content for Quick Answer. (Visible only with enabled Content Generation (AI) in configurations)

### Steps to create a Quick Answer

- Navigate to *Admin > Help Desk > Quick Answers*.
- Click on 'Add New Quick Answer' button.
- Fill in the details for the quick answer.
- Save the form to create the quick answer.



New Quick Answer

← Back Save

General

Title \*

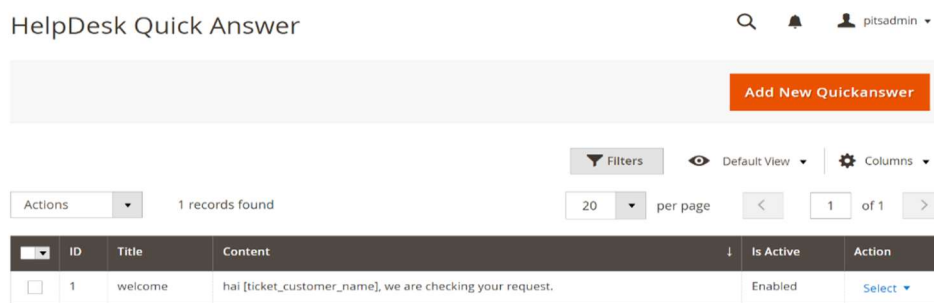
Content \*

Enter the content for quick answer. For example: You can use variables: [ticket\_code], [ticket\_customer\_name], [ticket\_customer\_email], [user\_firstname], [user\_lastname], [user\_email]

Generate AI Content

Status \* Yes

Figure 45 – Help Desk Quick Answer – New Quick Answer Page



HelpDesk Quick Answer

Add New Quickanswer

Filters Default View Columns

Actions 1 records found 20 per page 1 of 1

ID	Title	Content	Is Active	Action
1	welcome	hai [ticket_customer_name], we are checking your request.	Enabled	Select

Figure 46 – Help Desk Quick Answer- Quick Answer Listing Page

welcome 🔍 🔔 👤 pitsadmin ▾

← Back Delete Save and Continue Edit **Save**

General

Title \* welcome

Content \* hai [ticket\_customer\_name],  
we are checking your request

Enter the content for quick answer. For example: You can use variables:  
[ticket\_code], [ticket\_customer\_name], [ticket\_customer\_email],  
[user\_firstname], [user\_lastname], [user\_email]

**Generate AI Content**

Status \* Yes ▾

Figure 47 – Help Desk Quick Answer – Quick Answer view Page

## Steps to edit a quick answer

- Navigate to *Admin > Help Desk > Quick Answers*.
- Select the quick answer you want to edit.
- Click "View" in the Action column.
- Edit and update the quick answer details in this view.

## Generation of AI Content

- Click "Generate AI Content."
- Enter a prompt in the popup.
- Click "Generate" to create content.
- Review and edit if needed.
- Click "Apply" to transfer content to the message field.

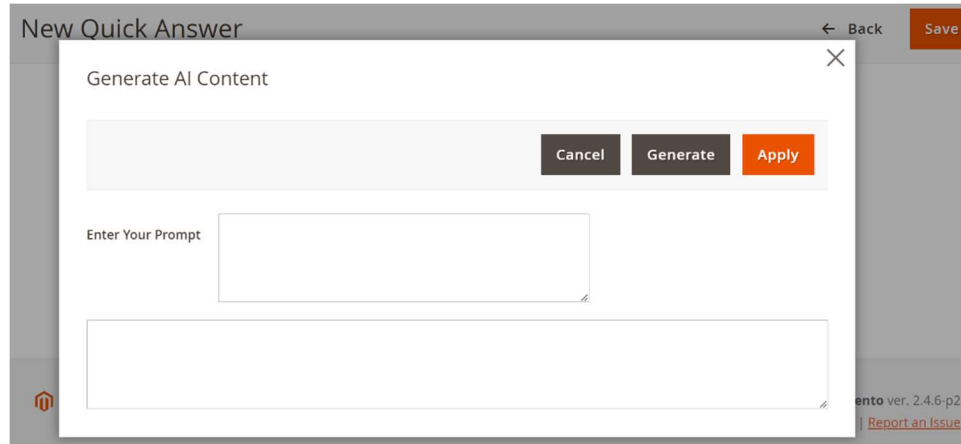


Figure 48 – Help Desk Quick Answer – Quick Answer AI Content Generation

## 19. Report

Reports provide a real-time graphical representation of the ticket-related data.

To see the report, Navigate to *Admin > Help Desk > Report*.

The report offers various features to enhance your understanding of ticket-related data.

- Allows tracking ticket fluctuations over days and months in real-time.
- Helps admins understand insights on seasonal trends and activity peaks.
- Facilitates proactive resource allocation for peak ticket periods.
- Optimizes team productivity across different operational cycles.
- Clearly delineates ticket statuses—open, closed, processing.
- Enables targeted interventions and issue prioritization.
- Empowers decision-makers to pinpoint bottlenecks in the resolution pipeline.
- Allows implementation of measures to speed up specific ticket categories.
- Equips support teams with concise yet comprehensive information.
- Enables continuous improvement of ticket resolution processes.

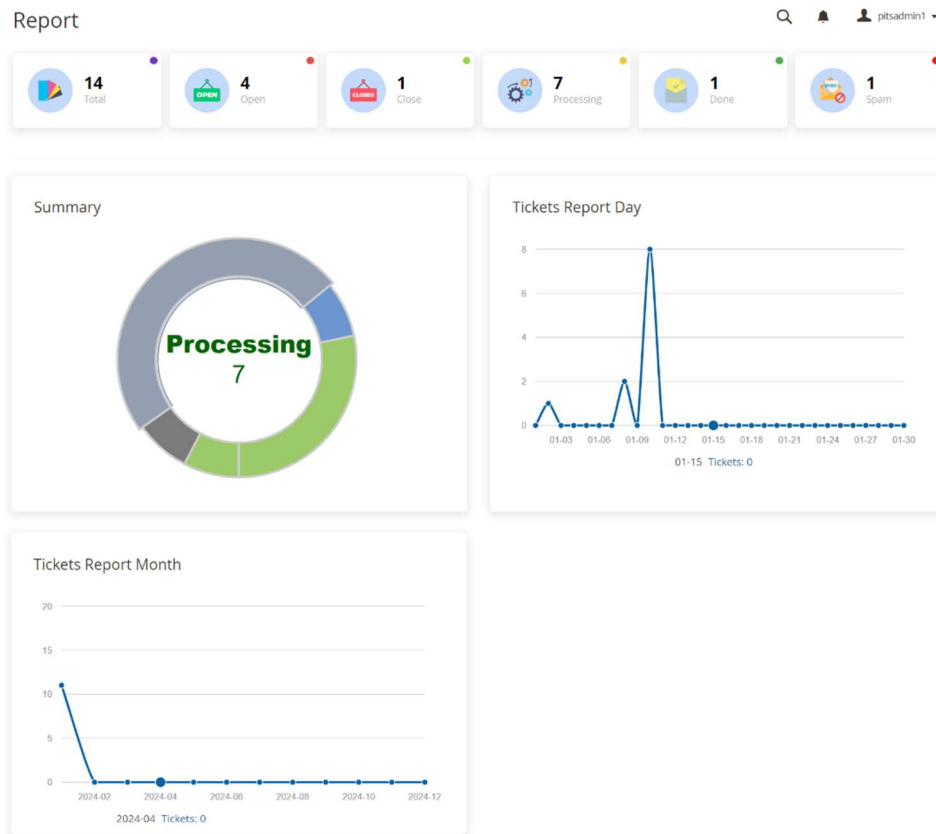


Figure 49 – Help Desk Report Page

## 20. Gateway

The fields included in the Gateway form.

- **Name:** Identifying label for the gateway configuration.
- **Email:** Email address associated with the gateway for communication.
- **Login:** Credentials used to access the gateway.
- **Password:** Secure key for gateway access.
- **Status:** Toggle to enable or disable the gateway.
- **Host:** Address indicating the location of the gateway.
- **Port:** Specific connection point for the gateway.
- **Protocol:** Communication method used by the gateway (e.g., POP3, IMAP).
- **Encryption:** Security protocol used for data transmission.

- **Search Keyword:** A term used to locate specific content within the gateway. We utilize the IMAP protocol to retrieve emails, which offers built-in search functionality. You can create search keywords by referring to the provided [documentation](#) for guidance.
- **Fetch Folder:** Folder for email retrieval.
- **Fetch Max:** Maximum number of emails to retrieve per cycle.
- **Department:** Allocation of tickets to specific operational units.
- **Store View:** Selection of specific stores where the gateway interface is accessible for operational use.
- **Notes:** Additional information or remarks related to the gateway.

### Steps to create a Gateway

- Navigate to *Admin > Help Desk > Gateways*.
- Click on 'Add New Gateway' button.
- Fill in the details for the gateway.
- Save the form to create the gateway.

HelpDesk Gateway 🔍 🔔 👤 pitsadmin ▾

Add New Gateway

⌵ Filters
👁 Default View ▾
⚙ Columns ▾

Actions ▾
1 records found
20 ▾ per page
< 1 of 1 >

<input type="checkbox"/>	ID	Action	Name	Email	Is Active	Host	Port	Protocol	Fetch Max	Fetch Folder	⌵
<input type="checkbox"/>	1	Select ▾	Test Gateway	test@test.com	Yes	test	1	imap	123	Inbox	

Figure 50 – Help Desk Gateway- Gateway Listing Page

New Gateway

pitsadmin

Back
Save

General

Name \*
Enter the name for the gateway.

Email \*
Enter the email address for the gateway.

Username \*
Enter the login credentials for the gateway.

Password \*
Enter the Password for the gateway.

Status \*

Yes

Enter whether the gateway is active or not.

Host \*
Enter the host name for the gateway.

Port \*
Enter the port number for the gateway.

Protocol \*

IMAP

Enter the protocol for the gateway.

Encryption \*

SSL

Select the Encryption for the gateway.

Search Keyword \*
Enter the Search Keyword for the gateway. For example: "SUBJECT: '[support]'"

fetch\_max \*
Enter the Maximum Fetch Frequency for the gateway. For example: 123

Fetch Folder \*
Enter the Fetch folder for the gateway. For example: Inbox

Department Id \*

Order

Select departments for the gateway.

Store Id \*

All Store Views

Select store views for the gateway.

Notes
Add Notes

Figure 51 – Help Desk Gateway- New Gateway Page

Key	Meaning
<sequence set>	Messages with message sequence numbers corresponding to the specified message sequence number set. Examples: "1", "589, 1067", "1..", "5,7,10,25,37..", "3..4". Multiple values are delimited with commas (,). Colon (:) is used to specify a range. For instance, "1:10" designates message indices in the range from 1 to 10. "*" is a wildcard. When used in a range, sets higher boundary of the range to the index of the last message in the folder.
ALL	All messages in the folder; the default initial key for ANDing.
ANSWERED	Messages with the \Answered flag set.
BCC <string>	Messages that contain the specified string in the envelope structure's BCC field.
BEFORE <date>	Messages whose internal date (disregarding time and timezone) is earlier than the specified date.
BODY <string>	Messages that contain the specified string in the body of the message.
CC <string>	Messages that contain the specified string in the envelope structure's CC field.
DELETED	Messages with the \Deleted flag set.
DRAFT	Messages with the \Draft flag set.
FLAGGED	Messages with the \Flagged flag set.
FROM <string>	Messages that contain the specified string in the envelope structure's FROM field.
HEADER <field-name> <string>	Messages that have a header with the specified field-name (as defined in [RFC-2822]) and that contains the specified string in the text of the header (what comes after the colon). If the string to search is zero-length, this matches all messages that have a header line with the specified field-name regardless of the contents.
KEYWORD <flag>	Messages with the specified keyword flag set.
LARGER <n>	Messages with an [RFC-2822] size larger than the specified number of octets.
NEW	Messages that have the \Recent flag set but not the \Seen flag. This is functionally equivalent to "RECENT UNSEEN".
NOT <search-key>	Messages that do not match the specified search key.
OLD	Messages that do not have the \Recent flag set. This is functionally equivalent to "NOT RECENT" (as opposed to "NOT NEW").
ON <date>	Messages whose internal date (disregarding time and timezone) is within the specified date.
OR <search-key1> <search-key2>	Messages that match either search key.
RECENT	Messages that have the \Recent flag set.
SEEN	Messages that have the \Seen flag set.
SENTBEFORE <date>	Messages whose [RFC-2822] Date: header (disregarding time and timezone) is earlier than the specified date.
SENTON <date>	Messages whose [RFC-2822] Date: header (disregarding time and timezone) is within the specified date.
SENTSINCE <date>	Messages whose [RFC-2822] Date: header (disregarding time and timezone) is within or later than the specified date.
SINCE <date>	Messages whose internal date (disregarding time and timezone) is within or later than the specified date.
SMALLER <n>	Messages with an [RFC-2822] size smaller than the specified number of octets.
SUBJECT <string>	Messages that contain the specified string in the envelope structure's SUBJECT field.
TEXT <string>	Messages that contain the specified string in the header or body of the message.
TO <string>	Messages that contain the specified string in the envelope structure's TO field.
UID <sequence set>	Messages with unique identifiers corresponding to the specified unique identifier set. Sequence set ranges are permitted.
UNANSWERED	Messages that do not have the \Answered flag set.
UNDELETED	Messages that do not have the \Deleted flag set.
UNDRAFT	Messages that do not have the \Draft flag set.
UNFLAGGED	Messages that do not have the \Flagged flag set.
UNKEYWORD <flag>	Messages that do not have the specified keyword flag set.
UNSEEN	Messages that do not have the \Seen flag set.
<p>&lt;string&gt; means a quoted string (like "Annual report" or "String with quote \" and backslash \ inside"). Certain key arguments specifying numbers (like &lt;n&gt;) must not be quoted.</p> <p>Dates must be written in IMAP4 format and enclosed with quotes. Example: "06-Apr-2006".</p> <p>Angle brackets (i.e. &lt;&gt; in &lt;string&gt;) only indicate placeholder for actual value, they are not actually a part of the key. For instance, TO &lt;string&gt; means the actual key will look like TO "jdoe@domain.com".</p>	
<p><b>Note</b></p> <p>Although searching is case-insensitive, some server implementations cannot perform search of strings containing international characters in case-insensitive manner even if the correct charset value is specified. Also, most IMAP server implementations cannot find searched string when it appears in the message in encoded form (such as Base64, quoted-printable, etc). Due to this, text search via IMAP4 is not as reliable as downloading entire messages and performing search over local copies.</p>	

Figure 52 – Gateway Configuration- Search Keyword Reference

## Steps to edit a Gateway

- Navigate to *Admin > Help Desk > Gateways*.
- Select the gateway you want to edit.
- Click "View" in the Action column.
- Edit and update the gateway details in this view.



Test Gateway

pitsadmin

← Back

Delete

Save and Continue Edit

Save

General

Name \*

Test Gateway

Enter the name for the gateway.

Email \*

test@test.com

Enter the email address for the gateway.

Username \*

username

Enter the login credentials for the gateway.

Password \*

test

Enter the Password for the gateway.

Status \*

Yes

Enter whether the gateway is active or not.

Host \*

test

Enter the host name for the gateway.

Port \*

1

Enter the port number for the gateway.

Protocol \*

IMAP

Enter the protocol for the gateway.

Encryption \*

SSL

Select the Encryption for the gateway.

Search Keyword \*

SUBJECT "[support]"

Enter the Search Keyword for the gateway. For example: 'SUBJECT "[support]"

fetch\_max \*

123

Enter the Maximum Fetch Frequency for the gateway. For example: 123

Fetch Folder \*

Inbox

Enter the Fetch folder for the gateway. For example: Inbox

Department Id \*

Order

Select departments for the gateway.

Store Id \*

All Store Views

Select store views for the gateway.

Notes

Add Notes

Figure 53 – Help Desk Gateway- Gateway View Page

## 21. Organization

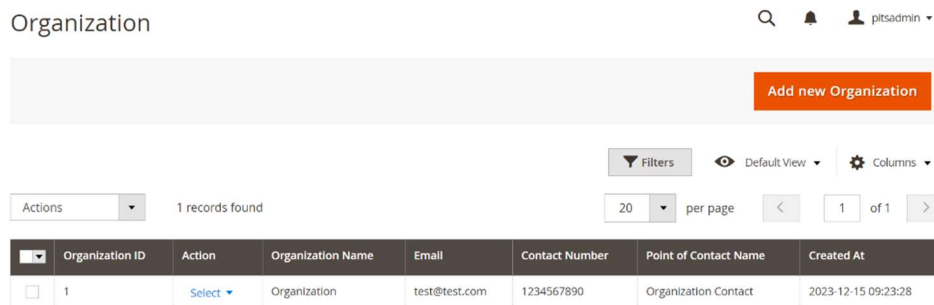
The organization menu in helpdesk system serves as a centralized hub displaying all added organizations.

The fields included in the Organization

- **Organization Name:** The unique identifier for the entity within the system.
- **Email:** Primary contact method for communication with the organization.
- **Contact Number:** The designated phone number for direct communication with the organization.
- **Point of Contact:** Individual responsible for interaction and management within the organization.

### Steps to create an organization

- Navigate to *Admin > Help Desk > Organizations*.
- Click on 'Add New Organization' button.
- Fill in the details for the organization.
- Save the form to create the organization.



The screenshot shows the 'Organization' listing page. At the top, there's a header with the title 'Organization', a search icon, a notification bell, and a user profile 'pitsadmin'. Below the header is a large light gray box with an 'Add new Organization' button on the right. Underneath this box are controls for 'Filters', 'Default View', and 'Columns'. A table below shows '1 records found' with a pagination of '20 per page' and '1 of 1'. The table has columns: Organization ID, Action, Organization Name, Email, Contact Number, Point of Contact Name, and Created At. One record is listed with ID 1, Name 'Organization', Email 'test@test.com', Contact Number '1234567890', Point of Contact Name 'Organization Contact', and Created At '2023-12-15 09:23:28'.

Organization ID	Action	Organization Name	Email	Contact Number	Point of Contact Name	Created At
1	Select	Organization	test@test.com	1234567890	Organization Contact	2023-12-15 09:23:28

Figure 54 – Help Desk Organization- Organization Listing Page

Add Organization

pitsadmin

← Back

Save

General

Organization Name

Enter the name of the organization.

Email

Provide the email address associated with the organization.

Contact Number

Enter the contact number for the organization.

Point of Contact

Specify the name of the point of contact within the organization.

Figure 55 – Help Desk Organization – New Organization Page

## Steps to edit an organization

- Navigate to *Admin > Help Desk > Organizations*.
- Select the organization you want to edit.
- Click "View" in the Action column.
- Edit and update the organization details in this view.

Edit Organization

pitsadmin

← Back

Save

General

Organization Name

Organization

Enter the name of the organization.

Email

test@test.com

Provide the email address associated with the organization.

Contact Number

1234567890

Enter the contact number for the organization.

Point of Contact

Organization Contact

Specify the name of the point of contact within the organization.

Figure 56 – Help Desk Organization – Organization View Page

## 22. Custom Fields

Custom Fields displays a list of personalized data fields available in the system. When creating a ticket, only the active custom fields are visible to the user.

The fields included in the Custom Fields

- **Field Title:** A name or label for the custom field.
- **Field Code:** A unique identifier for the custom field within the system.
- **Field Type:** Specifies the kind of data the field will contain (text, dropdown, etc.).
- **Option List:** Provides a set of predefined choices or options for the field.
- **Description:** A brief explanation or instructions for the custom field.
- **Is Active:** Indicates if the custom field is currently in use or not.
- **Position:** Determines the display order of the field within the form.
- **Is Required:** Specifies whether the field must be filled out before submission.
- **Store View:** Option to choose stores in which the custom fields are displayed.

### Steps to create a Custom Field

- Navigate to *Admin > Help Desk > Custom Fields*.
- Click on 'Add New Custom Field' button.
- Fill in the details for the custom field.
- Save the form to create the custom field.

HelpDesk Custom Fields

pitsadmin

Add new Custom Field

Filters

Default View

Columns

1 records found

20 per page

1 of 1

	ID	Field Title	Action	Field Code	Field Type	Description	Is Active	Position	Is Required	Store View
<input type="checkbox"/>	1	Place	Select	place	Text	Test	Yes	0	No	All Store Views

Figure 57 – Help Desk Custom Fields - Custom Fields Listing Page

Edit Custom Field 1

pitsadmin

Back
Delete Custom Field
Save and Continue Edit
Save Custom Field

General

Field Title \*

Place

Enter the name of the Custom Field.

Field Code \*

place

Enter the field code of the Custom Field.

Field Type

Text

Enter the field type of the Custom Field.

Option List

Add options as Value| Option. add next option as next line

Description

Test

Enter the description for the Custom Field.

Is Active

☒ Yes

Position

0

Is Required

☐ No

Enter weather the Custom Field is required or not.

Store View \*

All Store Views

Main Website

Main Website Store

Default Store View

de\_store

Select store views for the custom field.

Figure 58 – Help Desk Custom Fields - Custom Fields View Page

New Custom Field

pitsadmin

← Back

Save and Continue Edit

Save Custom Field

General

Field Title \*

Enter the name of the Custom Field.

Field Code \*

Enter the field code of the Custom Field.

Field Type

Text

Enter the field type of the Custom Field.

Option List

Add options as Value|Option, add next option as next line

Description

Enter the description for the Custom Field.

Is Active

☒

Yes

Position

Is Required

☐

No

Enter weather the Custom Field is required or not.

Store View \*

All Store Views

Main Website

Main Website Store

Default Store View

de\_store

Select store views for the custom field.

Figure 59 – Help Desk Custom Fields - New Custom Fields Page

## Steps to edit a Custom Field

- Navigate to *Admin > Help Desk > Custom Fields*.
- Select the custom field you want to edit.
- Click "View" in the Action column.
- Edit and update the custom field details in this view.

## 23. Auto Closing of Tickets

In the helpdesk module, the auto closing of tickets is a streamlined process that enhances efficiency in managing support requests.

### Process of Auto Closing of Tickets

- This automated process relies on specific parameters configured in the system, "Auto Close Ticket For, days" and "Auto Reminder Ticket For, days."
- The "Auto Close Ticket For, days" field determines the time frame within which a ticket will automatically close if there is no resolution or response.
- The "Completed Ticket Statuses" field determines which all tickets with the selected statuses will be marked as closed. Following the closure, an email notifying the customer of the status change will be sent.
- The "Auto Reminder Ticket For, days" field triggers reminders at predefined intervals, ensuring that unresolved tickets receive prompt attention and action.
- Reminder emails will not be sent for tickets with the status selected in the "Completed Ticket Statuses" field.
- These customizable settings contribute to timely resolution and customer satisfaction.
- By systematically handling pending requests within the system, this automated functionality ensures that tickets stay on the radar until they are appropriately addressed.

## 24. Technical Requirements / Compatible with:

- Magento Open Source v2.3.7 to v2.4.x

## 25. Supported Languages

- English, German, French, Italian and easily customizable for other Magento supported language packs.

## 26. Change Log / Release Notes

Version: 1.0.5: June 2025

- Compatible with Magento 2.4.2 (CE) – 2.4.8(CE)
- Compatible with Hyva Theme

Version: 1.0.4: August 2024

- Bug Fix – Resolved unwanted tags in message while creating ticket from email.

Version: 1.0.3: August 2024

- Bug Fix – Resolved incorrect sender email address issue in admin replies.

Version: 1.0.2: July 2024

- Compatible with Magento 2.3.4 (CE) version and greater.
- Compatible with Magento v2.4.7-p1 (CE)

Version: 1.0.1: March 2024

- Improvements & Magento v2.4.6-p4 (CE) compatibility changes

Version: 1.0.0: February 2024

- Initial version





## 27. Support

If you have questions, use our contact form at [webshopextension.com](https://webshopextension.com) or email at [support@webshopextension.com](mailto:support@webshopextension.com)