

Help Desk for Magento

User Guide

version 1.0

created by “IToris”

IToris

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1. Introduction

1.1. Purpose

This document is a **User Guide** for **Help Desk extension for Magento**. It describes how work with the extension.

This module is an advanced out-of-box ticket support system with the variety of settings and all expected support features included.

2. Installation and License

2.1. System Requirements

The extension works under Magento from 1.4.x and higher.

The extension works with Apache 1.3.x and higher, PHP 5, Linux or IIS.

The extension's correct work is guaranteed with the following browsers:

- IE7, IE8, IE9
- FireFox 4.x, 5.x
- Google Chrome 15.x
- Safari 5.x

The correct work with other Magento versions, other browsers and Apache/PHP versions is not guaranteed.

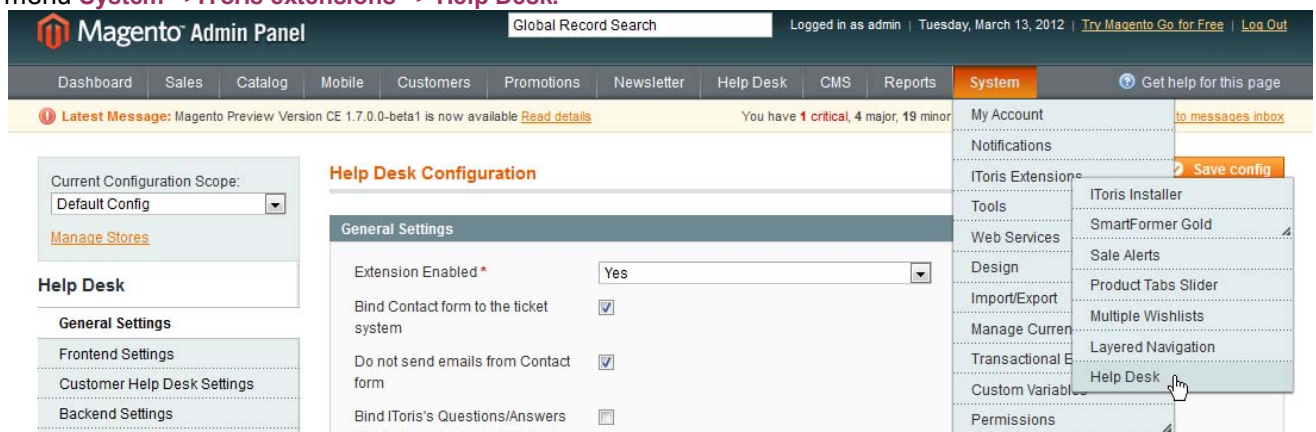
2.2. Installation

All our Magento extensions and templates are installed via **IToris Installer**.

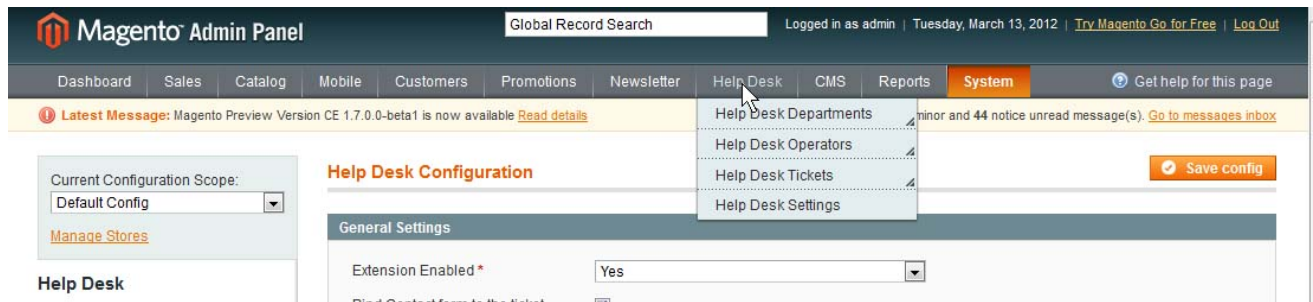
Download **IToris Installer** from here <http://www.itoris.com/itoris-magento-installer.html> and un-pack to the root of your website. It will then appear in menu **System →IToris extensions → IToris Installer**.

Open it and you will see all our Magento Extensions and Templates, both installed and available. You can install, update and un-install them with one click now.

Find **Help Desk** in the list of extensions and press **Install** button. It will ask for the license key that you will receive after the purchase. Enter the key and submit. The extension will be installed. It will be available in menu **System →IToris extensions → Help Desk**.



You will see a new menu after the installation - Help Desk. There will be ability to manage departments, operators, tickets and general settings there.



2.3. License

Help Desk extension is website-dependent. By 'website' here we understand the website in Magento terms. Under one Magento installation one license key of the extension can activate all stores/storeviews. within one website.

If your configuration has several Magento websites - a separate license will be required for each.

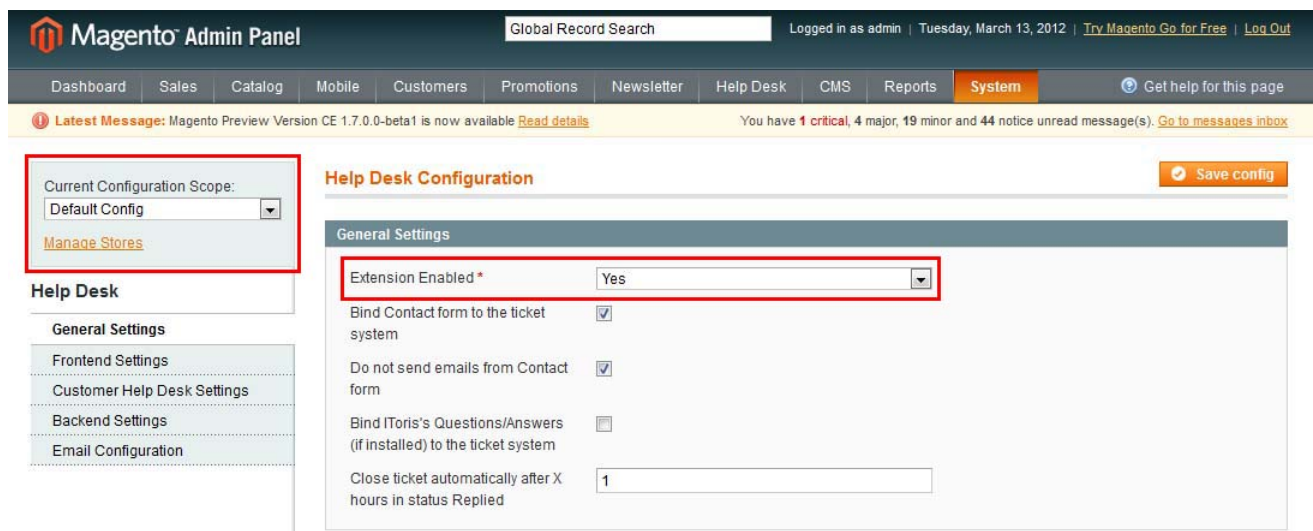
You can switch the license from one website to another – login to <http://www.itoris.com> using the credentials you will receive after the purchase. Go to **My Downloads** area, find your key there and reset it from the current website. Then use it again to activate another website.

The license also includes free life-time updates for the extension.

3. Settings and Configurations

3.1. General Settings

As the extension is highly configurable, there can be different settings applied, that will change the look and behavior of the module.



To see general settings select

System -> IToris Extensions -> Help Desk or **Help Desk -> Help Desk Settings**

Extension Enabled - when yes is selected, the module will be available on the front-end.

Current Configuration Scope - if you need Help Desk module to work on some stores only, please enable the extension for these stores, leaving it disabled for the others.

On the left there also go the tabs with other Help Desk' settings and configuration.

Please, visit us at: <http://www.itoris.com> or contact directly by email: sales@itoris.com

3.2. Languages' Settings

Different languages can be used for different stores in the module. By defaults the module is provided in English.

To translate it for stores please open **app/locale/en_En** in your Magento and find **Itoris_QuickCheckout.csv** file there.

Copy the file to the locale you need and open the copy for editing.

The file will contain each phrase twice. Translate the second part of each phrase and save the changes.

3.3. Support Form

The main way to ask for support and create a new request is support form. That is why so much attention is paid to it in Help Desk module.

There are 3 places to settle support form. You can select one place, two places or all three places together:

The screenshot shows the 'Help Desk Configuration' page. On the left is a sidebar with 'Current Configuration Scope' set to 'Default Config' and a 'Manage Stores' link. Below this is a 'Help Desk' section with tabs for 'General Settings' (selected), 'Frontend Settings', 'Customer Help Desk Settings', 'Backend Settings', and 'Email Configuration'. The main content area is titled 'Help Desk Configuration' and has a 'Save config' button. Under the 'General Settings' tab, there are several options: 'Extension Enabled *' (set to 'Yes'), 'Bind Contact form to the ticket system' (checked), 'Do not send emails from Contact form' (unchecked), 'Bind IToris's Questions/Answers (if installed) to the ticket system' (unchecked), and 'Close ticket automatically after X hours in status Replied' (set to '1'). A red box highlights the three options related to binding the contact form and questions/answers to the ticket system.

3.3.1. Support Form in Customers' Dashboard

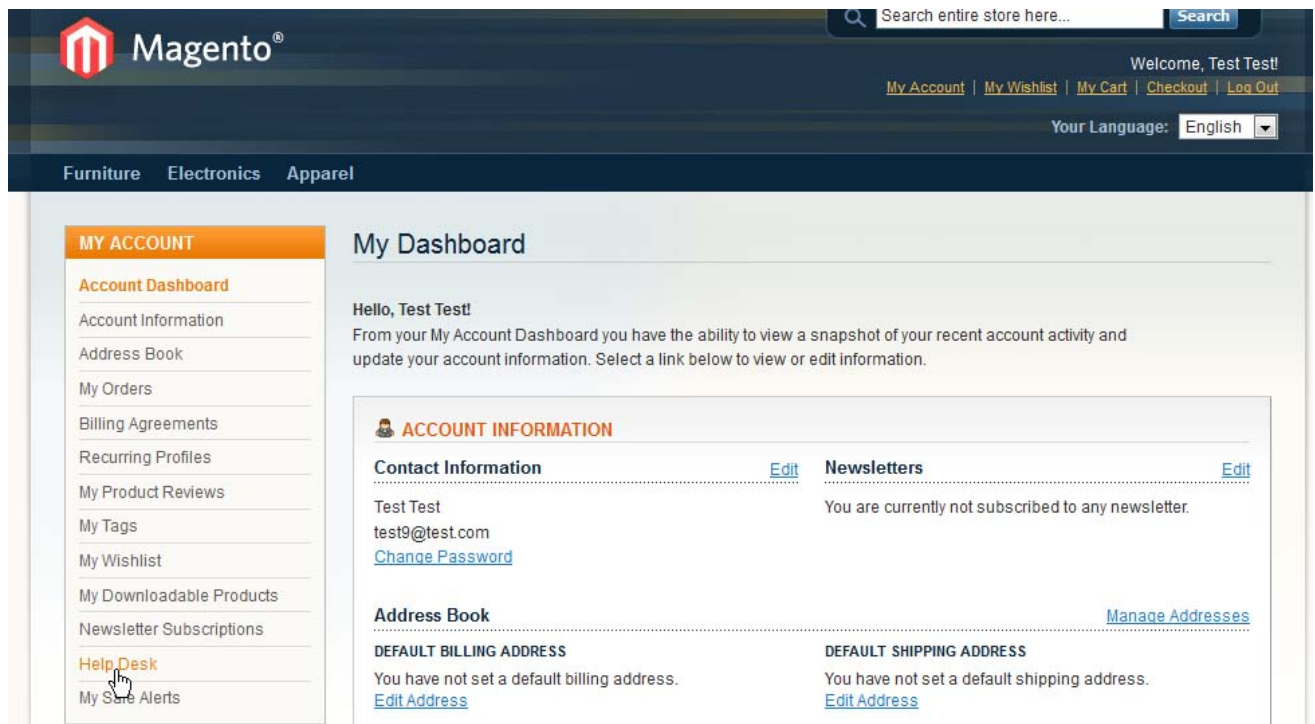
Support form can be added to customers' account area. The form will be added there together with the rest of support functionality - History of replies, ability to view old tickets, etc.

To do it please select **Help Desk -> Help Desk Settings**. Then from the left tabs select **Customer Help Desk Settings**

The screenshot shows the 'Help Desk Configuration' page with the 'Customer Help Desk Settings' tab selected. The sidebar is the same as in the previous screenshot. The main content area shows the 'Customer Help Desk Settings' tab. A red box highlights the 'Enable Help Desk in Customer account' checkbox, which is checked. Other settings include 'Allow to set Priority' (unchecked), 'Allow to select Department' (unchecked), 'Allow to select Order' (unchecked), 'Enable attachments to new tickets' (unchecked), 'Enable attachments to replies' (unchecked), and 'Attachment max filesize' (set to '2048' kilobytes).

Check **Enable Help Desk in Customer account** checkbox.

This will create a new tab in customers' accounts - Help Desk - where support form and support history will be available:



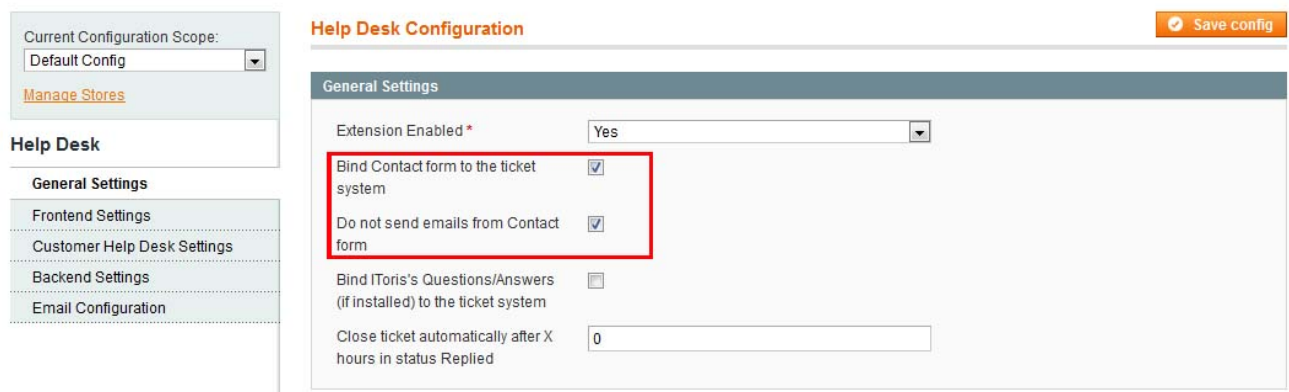
3.3.2. Contact Form as Support Form

You can make default Magento Contact Us form as support form. To do it select **Help Desk -> Help Desk Settings**. Then from the left tabs select **General Settings**.

Check **Bind Contact form to the ticket system** checkbox.

Contact Us form has its own emails. It is recommended to switch them off, so that as now contact form works as support form, only support emails are sent and no duplicates are created.

To switch off standard contact emails check **Do not send emails from Contact form** checkbox.



There is ability to add hours of operation over contact form. Do to it select **Help Desk -> Help Desk Settings**. Then from the left tabs select **Frontend Settings**.

Check **Show Hours of Operation on the Contact Form** checkbox and enter the hours of operation in the area below:

Your customers then will see contact form this way:

When they submit their data in this form - new tickets will be created in Help Desk.

3.3.3. Questions&Answers on Product Pages as Support Forms

IToris provides a module for Magento Questions& Answers.

This module creates a new area on products' pages where there questions and answers on the product are provided. Customers can see them, ask new questions and receive replies from other customers and/or administrators.

For more details about Q&A extension please see <http://www.itoris.com/magento-questions-answers-ga.html>
Demo of Q&A is available on <http://www.itoris.com/demo/magento-products/main/index.php/electronics/computers/laptops/apple-macbook-pro-ma464ll-a-15-4-notebook-pc-2-0-ghz-intel-core-duo-1-gb-ram-100-gb-hard-drive-superdrive.html>

Questions&Answers can be combined with Help Desk so that when customers ask new questions about products, these questions are handled out as support requests.

Please, visit us at: <http://www.itoris.com> or contact directly by email: sales@itoris.com

To make Q&A form work as support from please select **Help Desk -> Help Desk Settings**. Then from the left tabs select **General Settings**. Check **Bind IToris's Questions/Answers (if installed) to the ticket system** checkbox.

The screenshot shows the 'Help Desk Configuration' interface. On the left, there's a sidebar with 'Current Configuration Scope: Default Config' and a 'Manage Stores' link. Below that, the 'Help Desk' section is expanded, showing 'General Settings' as the active tab. The main content area is titled 'Help Desk Configuration' and contains a 'General Settings' section. In this section, the 'Bind IToris's Questions/Answers (if installed) to the ticket system' checkbox is checked and highlighted with a red rectangle. Other settings include 'Extension Enabled' (Yes), 'Bind Contact form to the ticket system' (checked), 'Do not send emails from Contact form' (checked), and 'Close ticket automatically after X hours in status Replied' (0).

3.4. Customers' Settings

3.4.1. Help Desk in Customers' Accounts

There are several settings to manage the customers' access and use of Help Desk.

To provide customers with ability to see the history, have access to previous replies and old tickets, please add Help Desk functionality to the customers' accounts.

To do it please select **Help Desk -> Help Desk Settings**. Then from the left tabs select **Customer Help Desk Settings** and check **Enable Help Desk in Customer account** checkbox. You have perhaps done this already if you have bound support form to customers' account.

3.4.2. Options when Support Tickets are Created

When new tickets are submitted there are several settings to be switched on/off depending on your support style.

The screenshot shows the 'Help Desk Configuration' interface with the 'Customer Help Desk Settings' tab selected. The 'Enable Help Desk in Customer account' checkbox is checked. Below it, a group of settings is highlighted with a red rectangle: 'Allow to set Priority' (checked), 'Allow to select Department' (checked), 'Allow to select Order' (checked), 'Enable attachments to new tickets' (checked), and 'Enable attachments to replies' (checked). The 'Attachment max filesize' is set to 2048, with a note 'in kilobytes (0 - unlimited)'.

- If you plan several departments to separate support, then you can allow your customers selecting the department they need. **Allow to set Priority** checkbox
- There can be ability to select the priority of the request (Low / Normal / High / Urgent). **Allow to select Department** checkbox

- There is ability for customers to select the purchase order to be associated with support ticket. **Allow to select Order** checkbox
- If you want to allow attachments to support tickets, this can be activated as well. There is also ability to limit the maximal size of the attachments. **Enable attachments to new tickets**, **Enable attachments to replies** and **Attachment max filesize** checkboxes

3.4.3. Access Settings (Visitors/Customers)

There is ability to set if both visitors and customers will have access to Help Desk - or account is required to use the functionality.

To manage these settings please select **Help Desk -> Help Desk Settings**. Then from the left tabs select **Frontend Settings**

Current Configuration Scope: Default Config

[Manage Stores](#)

Help Desk

- General Settings
- Frontend Settings**
- Customer Help Desk Settings
- Backend Settings
- Email Configuration

Help Desk Configuration [Save config](#)

Frontend Settings

Show Hours of Operation on the Contact Form ☒

Hours of Operation

Monday to Friday 10:00 am - 8:30 pm
Saturday 9:30 am - 6:00 pm
Sunday 10:00 am - 5:00 pm

Allow Customers to view tickets not being logged in ☒

Allow visitors to see ticket on the frontend ☒

Allow Customers to view tickets not being logged in - once a reply has been posted by an operator, the customer will receive email notification (please select this in Email Configuration). There is ability to insert hash URL in this email - customers will click it and see the reply. If this setting is selected, then customers will see this reply without logging in. If this setting is not selected, then customers should login to see the reply

Allow visitors to see ticket on the frontend - there is ability to support visitors (that have no account on your website at all). If you select this setting, please make sure you insert text of the reply message in emails sent to visitors (in Email Configuration).

Visitors will receive a reply, see it inside the email, and will be able to send a new question via email, that will be parsed to continued support request.

3.5. Statistics in Dashboard (back-end)

To open these settings please select **System -> IToris Extensions -> Help Desk** or **Help Desk -> Help Desk Settings**

Then select **Backend Settings** tab on the left.

Current Configuration Scope: Default Config

[Manage Stores](#)

Help Desk

- General Settings
- Frontend Settings
- Customer Help Desk Settings
- Backend Settings**
- Email Configuration

Help Desk Configuration [Save config](#)

Backend Settings

Show Support Tickets Stats on Dashboard ☐

Show Tickets Stats by Department on Dashboard ☐

Show Tickets Stats by Operator on Dashboard ☐

These settings deal with statistics to be displayed in admin area. There are several statistics blocks, some or all of them can be displayed.

Show Support Tickets Stats on Dashboard - there will be a box displaying how many tickets there have been totally, how many of them need reply, are closed, are replied, etc.

Show Tickets Stats by Department on Dashboard - one more box where statistics will be divided by departments

Show Tickets Stats by Operator on Dashboard - one more box where statistics will be divided by operators

To add statistics to the dashboard please activate the settings as make some alterations in the dashboard's file [app/design/adminhtml/default/default/template/dashboard/index.phtml](#). The following line of code should be added there:

```
<?php echo $this->getChildHtml('helpdesk_stats') ?>
```

There are 5 places where this line can be inserted; this will change the location of the statistics on the dashboard. These places are marked in the code below. Please select one out of 5:

```
<div class="dashboard-container">
    <?php echo $this->getChildHtml('store_switcher') ?>
    <table cellpadding="25" width="100%">
        <tr>
            <td>
```

<!-- add the line here -->

```
<?php echo $this->getChildHtml('sales') ?>
```

<!-- or here -->

```
                <div class="entry-edit">
                    <div class="entry-edit-head"><h4><?php echo $this->__('Last 5
Orders') ?></h4></div>
                    <fieldset class="np"><?php echo $this-
>getChildHtml('lastOrders'); ?></fieldset>
                </div>
```

<!-- or here -->

```
                <div class="entry-edit">
                    <div class="entry-edit-head"><h4><?php echo $this->__('Last 5
Search Terms') ?></h4></div>
                    <fieldset class="np"><?php echo $this-
>getChildHtml('lastSearches'); ?></fieldset>
                </div>
```

<!-- or here -->

```
                <div class="entry-edit">
                    <div class="entry-edit-head"><h4><?php echo $this->__('Top 5
Search Terms') ?></h4></div>
                    <fieldset class="np"><?php echo $this-
>getChildHtml('topSearches'); ?></fieldset>
                </div>
```

<!-- or here -->

```
</td>
```

...

3.6. Emails' Settings

Help Desk allows using standard Magento email templates' functionality for support emails. You can create new email templates and bind them to Help Desk functionality. Default email templates are created already, you can use them as they go, or change, or use any new ones.

To manage emails' settings please select **Help Desk -> Help Desk Settings**. Then select **Email Configuration** tab on the left.

The screenshot displays the 'Help Desk Configuration' page with the 'Email Configuration' tab selected. On the left sidebar, under 'Help Desk', the 'Email Configuration' tab is highlighted. The main content area contains the following settings:

- Current Configuration Scope:** Default Config (dropdown)
- Manage Stores** (link)
- Help Desk**
 - General Settings
 - Frontend Settings (icon)
 - Customer Help Desk Settings (icon)
 - Backend Settings
 - Email Configuration**

The 'Email Configuration' section includes:

- Default email address**: Text input field.
- Send Email to Admin when new ticket is created**: Checkbox.
- Email Template to Admin for new tickets**: Dropdown menu (Default email template to admin for new tickets).
- Send Email to Customer when new ticket is created**: Checkbox.
- Email Template to Customer for new tickets**: Dropdown menu (Default email template to customer for new tickets).
- Send Email to Customer when Reply added**: Checkbox.
- Email Template for replied tickets**: Dropdown menu (Default email template for replied tickets).
- Send Email to Operator when Update added**: Checkbox.
- Email Template for updated tickets**: Dropdown menu (Default email template for updated tickets).
- Send Email to Customer when ticket Closed**: Checkbox.
- Email Template for closed tickets**: Dropdown menu (Default email template for closed tickets).
- Send Email to Operator once ticket is Assigned**: Checkbox.
- Email Template for assigned tickets**: Dropdown menu (Default email template for assigned tickets).
- Convert email replies into Ticket Replies**: Checkbox.
- Check emails every X hours**: Text input field (0).
- Connection type**: Dropdown menu (POP).
- Host**: Text input field.
- Login**: Text input field.
- Password**: Text input field.
- Port**: Dropdown menu (POP3 - 110).
- TSL/SSL**: Dropdown menu (None).
- Delete reply emails from host**: Checkbox.

A 'Save config' button is located in the top right corner.

Default email address is the address from which your customers will receive all email notifications.

Send Email to ... when ... - check the checkboxes for the cases when you want emails to be sent - to administrator, to operators, to customers.

Email Template ... - these drop downs are for selecting the email templates to be used when emails are generated. There are pre-set email templates created already, they can be edited or new ones can be created and assigned.

Email templates are edited/created in standard Magento way.

Convert email replies into Ticket Replies - this setting allows customers to reply via emails. Received replies will be parsed and converted into ticket replies.

Check emails every X hours - native Magento cron will be used to check the received emails with the frequency set.

The low block of settings manages the connection to the mail server. Please select/set them according to the server's settings.

4. Support Management

After the initial preferences have been selected, now support structure can be organized.

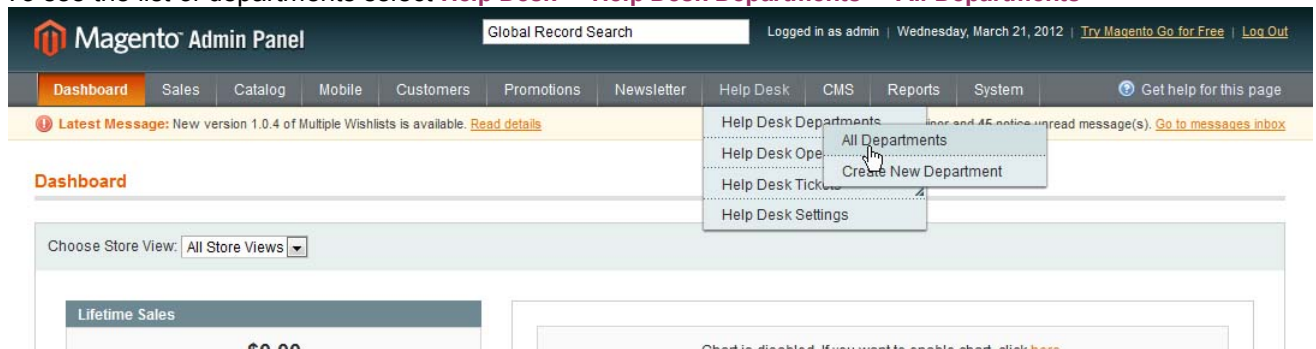
4.1. Departments

There is ability to create as many departments as needed. Each department will be responsible for their part of support. You can also allow customers to select a department when a new ticket is submitted.

Departments should have at least one operator assigned to it, there can be several operators.

4.1.1. Departments' List

To see the list of departments select **Help Desk -> Help Desk Departments -> All Departments**



You will see all departments existing and their basic information.

Departments + Create New Department

Page 1 of 1 pages | View 20 per page | Total 3 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	ID	Stores Assigned	Department	Is Visible	Operators	Tickets	Actions
Any	From:	To:					
<input type="checkbox"/>	1	Main Website Main Store English French German	Sales Department	Yes	2	2	Edit
<input type="checkbox"/>	2	Main Website Main Store English French German	Technical Support	Yes	1	2	Edit
<input type="checkbox"/>	3	Main Website Main Store English French	General Enquiries	Yes	1	3	Edit

There will be departments' names, which stores they are assigned to, number of operators in each department, number of assigned tickets, etc.

All standard Magento filters are available on the page, so when a list is large there is sorting and search available.

4.1.2. Create a New Department

To create a new department select **Help Desk -> Help Desk Departments -> Create New Department** or press **Create New Department** button from the list of departments.

The screenshot shows the Magento Admin Panel interface. The top navigation bar includes 'Dashboard', 'Sales', 'Catalog', 'Mobile', 'Customers', 'Promotions', 'Newsletter', 'Help Desk' (selected), 'CMS', 'Reports', and 'System'. A sidebar on the left lists 'Department Information', 'Edit Department', 'Stores Assigned', and 'Operators Assigned'. The main content area is titled 'Department Information' and contains the 'Edit Department' form. The form fields are: 'Title *' (with the value 'General Enquiries'), 'Address line 1', 'Address line 2', 'Is Visible on Frontend' (checked), and 'Is default department' (unchecked). Buttons for 'Back', 'Reset', 'Save Department', and 'Save and Continue Edit' are at the top right of the form.

Enter the department's title and select if it should be visible on the front-end and should be default. There is also ability to enter the department's address if required.

Two additional settings' tabs allow to assign the department to stores and assign operators to the department.

This screenshot shows the 'Stores' tab within the 'Edit Department' form. A yellow message box states: 'Please note that store view can be un-assigned only if the department has no tickets assigned to the store view'. Below this, the 'Stores Assigned' section features a list box. The list box is titled 'Main Website' and contains the following items: 'Main Store', 'English', 'French', and 'German'. The 'Main Store' item is currently selected and highlighted in blue.

Only selected or all stores can be bound with the department.

If the list of operators has been created already, there is ability to connect operators to the department. Otherwise this can be done later on. When **Operators Assigned** tab is selected, all available operators will be displayed. You can select all or some of them.

Department Information

Global Record Search | Logged in as admin | Wednesday, March 21, 2012 | [Try Magento Go for Free](#) | [Log Out](#)

Dashboard | Sales | Catalog | Mobile | Customers | Promotions | Newsletter | **Help Desk** | CMS | Reports | System | [Get help for this page](#)

Latest Message: New version 1.0.4 of Multiple Wishlists is available. [Read details](#) | You have 1 critical, 4 major, 19 minor and 45 notice unread message(s). [Go to messages inbox](#)

Department Information [Back] [Reset] [Save Department] [Save and Continue Edit]

Operators

Please note. To un-assign operator transfer all his/her tickets to another person first

Operators Assigned

- John
- Jane
- Alex

Operators Assigned

Save the changes and the department is ready. Create all other departments you need the same way.

4.1.3. Edit Departments

When you open up a department for editing, you will see the same as when a new department is created plus one more new tab - **Department View**:

Department Information [Back] [Reset] [Save Department] [Save and Continue Edit]

General Enquiries

Department Information

Created On: Mar 21, 2012 5:40:09 PM | Stores: Main Website
 Address: Main Store
 Operators: 1 | English
 Tickets: 3 | French
 Is Visible: Yes

Ticket Statistic

Website	Store	Store View	Pending	Replied	Updated	Closed	Total
Main Website	Main Store	English	1	0	0	2	3
Main Website	Main Store	French	0	0	0	0	0
All Store View			1	0	0	2	3

Operator Statistic

Operator	Pending	Replied	Updated	Closed	Total
Alex	0	0	0	0	0

This tab will display department's statistics - general information, tickets and operators.

4.1.4. Delete Departments

To delete a department please un-assign all operators and tickets from it first. Then check it in the list of departments, select Actions=**delete** and press **Submit** button.

Departments

Create New Department

Page 1 of 1 pages | View 20 per page | Total 3 records found

Reset Filter

Search

Select All Unselect All Select Visible Unselect Visible 1 items selected						Actions Delete Submit	
	ID	Stores Assigned	Department	Is Visible	Operators	Tickets	Actions
Any	From:						
	To:						
<input checked="" type="checkbox"/>		1 Main Website Main Store English French German	Sales Department	Yes	2	2	Edit
<input type="checkbox"/>		2 Main Website Main Store English French German	Technical Support	Yes	1	2	Edit
<input type="checkbox"/>		3 Main Website Main Store English French	General Enquiries	Yes	1	3	Edit

4.2. Operators

Operators are administrators that are bound to a selected department or several departments. Operators can reply submitted tickets, manage them.

They will have access to the tickets from their departments; can assign new tickets to themselves or other operators from their department.

They will receive email notifications on replies and updates.

All operators can potentially view any tickets as well as reply on them and assign them, as operators have administrative permissions. Ability to organize support by departments, operators and tickets is provided for convenient management, so that no support requests are lost. With a good-structured support department the notifications will be received by the operators you need, tickets will be sorted out by departments and statistics will show what needs to be handled out.

4.2.1. Operators' List

To see the list of all existing operators please select **Help Desk -> Help Desk Operators -> All Operators**

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs: Dashboard, Sales, Catalog, Mobile, Customers, Promotions, Newsletter, Help Desk, CMS, Reports, and System. The 'Help Desk' tab is selected, and a dropdown menu is open, showing options: Help Desk Departments, Help Desk Operators, All Operators, Help Desk Tickets, and Help Desk Settings. The 'All Operators' option is highlighted. Below the navigation bar, there's a 'Latest Message' section and a 'Dashboard' section with a 'Choose Store View' dropdown set to 'All Store Views'. A 'Lifetime Sales' widget shows '\$0.00'. A message at the bottom states 'Chart is disabled. If you want to enable chart, click here.'

You will see all operators as well as general information about them - to which department(s) they are connected, how many tickets are assigned to them directly, etc.

Help Desk Operators

+ Create New Operator

Page 1 of 1 pages | View 20 per page | Total 3 records found

Reset Filter

Search

Select All Unselect All Select Visible Unselect Visible 0 items selected						Actions	Submit
ID	Stores Assigned	Operator	Departments	Tickets	Actions		
Any	From: To:						
<input type="checkbox"/>	3 Main Website Main Store English French German	Alex	Technical Support General Enquiries	0	Edit Delete		
<input type="checkbox"/>	2 Main Website Main Store English French German	Jane	Sales Department	0	Edit Delete		
<input type="checkbox"/>	1 Main Website Main Store English French German	John	Sales Department	0	Edit Delete		

4.2.2. Create a New Operator

To create a new operator please make sure first that the admin profile for this operator has been created already. Select **Help Desk -> Help Desk Operators -> Create New Operator** or press **Create New Operator** button from the list of operators.

Operator Information

Edit Operator

Departments Assigned

Operator Information

Back

Reset

Save Operator

Save and Continue Edit

Edit Operator

Title *

Admin account

--please select--

--please select--

admin admin

John Smith

Jane Doe

Alex Jeffer

James Doe

Admin account

Enter a title to be used to identify the operator and select the admin's profile.

Then switch to **Department Assigned** tab and assign the department(s) to the operator. N.B. - this can be done in operators' profiles as well as in departments' details.

Select all departments where this person will work as an operator:

Operator Information

Edit Operator

Departments Assigned

Operator Information

Back

Reset

Save Operator

Save and Continue Edit

Departments

Please note. To un-assign a department you should transfer all tickets to another operator.

Departments Assigned

Sales Department

Technical Support

Departments Assigned

Save the operator's details to apply the changes.

4.2.3. Edit Operators

To edit an operator select him/her from the list of operators and press **Edit** link. You will see the profile similar to the one you see when a new operator is created, yet there is one more new tab - **Operator View**:

Operator Information
 Operator View
 Edit Operator
 Departments Assigned

Alex
 Back Reset Delete Operator Save Operator Save and Continue Edit

Operator Information
 Created On: Mar 21, 2012 5:38:55 PM Stores: Main Website
 Admin account: [Alex Jefferson \(alex@jefferson.com\)](#) Main Store
 Departments: 2 English
 Tickets: 0 German
 French

Ticket Statistic

Website	Store	Store View	Pending	Replied	Updated	Closed	Total
Main Website	Main Store	English	0	0	0	0	0
Main Website	Main Store	German	0	0	0	0	0
Main Website	Main Store	French	0	0	0	0	0
All Store View			0	0	0	0	0

Department Statistic

Department	Pending	Replied	Updated	Closed	Total
Technical Support	0	0	0	0	0
General Enquiries	0	0	0	0	0

This tab displays statistics of the operator - tickets, departments, general information.

The rest two tabs stay the same. You can edit any information of the operator and then save the changes.

4.2.4. Delete Operators

To delete an operator find him/her in the list of operators and press **Delete** link.

Help Desk Operators
Create New Operator

Page 1 of 1 pages | View 20 per page | Total 3 records found
 Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
 Actions Submit

	ID	Stores Assigned	Operator	Departments	Tickets	Actions
Any	From: To:					
<input type="checkbox"/>	3	Main Website Main Store English French German	Alex	Technical Support General Enquiries	0	Edit Delete
<input type="checkbox"/>	2	Main Website Main Store English French German	Jane	Sales Department	0	Edit Delete
<input type="checkbox"/>	1	Main Website Main Store English French	John	Sales Department	0	Edit Delete

If you need to delete several operators together, check their checkboxes and select Actions = **delete**. Press **Submit** button.

Help Desk Operators Create New Operator

Page 1 of 1 pages | View 20 per page | Total 3 records found Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 2 items selected Actions Delete Submit

ID	Stores Assigned	Operator	Departments	Tickets	Actions
Any	From: To:				
<input checked="" type="checkbox"/>	3 Main Website Main Store English French German	Alex	Technical Support General Enquiries	0	Edit Delete
<input checked="" type="checkbox"/>	2 Main Website Main Store English French German	Jane	Sales Department	0	Edit Delete
<input type="checkbox"/>	1 Main Website Main Store English French German	John	Sales Department	0	Edit Delete

In case operators have tickets assigned directly to them, they cannot be deleted. Please un-assign the tickets prior to deleting.

4.3. Tickets

Tickets are support requests submitted by your customers from any support form you have set. Initially they can be not assigned to any department. If you allow your customers to select a department when they submit tickets, then tickets will be assigned to the department.

There is a 'main' administrator, whose email will be added in the settings. The administrator will receive all notifications and will assign tickets to departments and/or operators. Though any other operator can assign/un-assign tickets as well.

Tickets have several statuses for easy management:

- Pending**
 new ticket. It has been submitted and has had no reply yet. If the customer has posted one more comment to the ticket, it stays pending until there is a reply from an operator.
- Replied**
 an operator has posted a reply. If the communication continued, each new reply from the operator will change the ticket to 'replied' status
- Updated**
 the customer has continued the communication by posting an update to the ticket. If the communication continued, each new reply from the customer will change the ticket to 'updated' status
- Closed**
 the question has been solved and the ticket does not need further communication. Closing can be either manual by the operator or any other administrator, or automated after X hours if you have selected this in the settings.

4.3.1. Tickets' Lists

There is ability to view full list of tickets together or selected tickets only.

To **view all tickets** together, select **Help Desk -> Help Desk Tickets -> All Tickets**

Help Desk Tickets

Page 1 of 1 pages | View 20 per page | Total 7 records found

Export to: CSV Export Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

	ID	Created On	Store	Customer	Department	Subject	Status	Replies	Operator	Priority	Actions
Any		From: To:									
<input type="checkbox"/>	BT60514	Mar 13, 2012	Main Website Main Store English	arge@wegvw.com	Technical Support	Message from the Contact form	Replied	1	Alex	Normal	Edit
<input type="checkbox"/>	DN69499	Mar 13, 2012	Main Website Main Store English	dsfs@sb.com	Technical Support	Message from the Contact form	Pending	0		Normal	Edit
<input type="checkbox"/>	YK21662	Mar 12, 2012	Main Website Main Store English	Anna IToris	Sales Department	Reply should be converted to ticket reply at 16.40	Closed	2		Urgent	Edit
<input type="checkbox"/>	PG74107	Mar 7, 2012	Main Website Main Store English	Anna IToris	Sales Department	Reply should be converted to ticket reply at 22.25!!!	Pending	0		Urgent	Edit
<input type="checkbox"/>	IJ84541	Mar 7, 2012	Main Website Main Store English	Anna IToris	General Enquiries	Reply should be converted to ticket reply at 22.25	Replied	1	Alex	Urgent	Edit
<input type="checkbox"/>	MH81352	Mar 7, 2012	Main Website Main Store English	anna@itoris.com	General Enquiries	Message from the Contact form	Closed	1		Normal	Edit
<input type="checkbox"/>	FK46147	Mar 7, 2012	Main Website Main Store	Anna IToris	General Enquiries	test	Closed	0		Normal	Edit

Full list of tickets will be displayed, with the departments/operators they are assigned to, their status, number of replies, etc. There are standard Magento sorting filters and search available. Administrators can open up any ticket to manage it or assign to operators/departments.

Apart from the full list there is ability to **view only the tickets that need replies**. To open this list select **Help Desk -> Help Desk Tickets -> Tickets Requiring Reply**. This list will display the tickets with pending and updated statuses only.

Each operator is able to **view the list with the tickets assigned to them only**. To do it operator selects **Help Desk -> Help Desk Tickets -> My Tickets**

4.3.2. Assign Tickets to Departments and Operators

Tickets can be assigned one by one, bulk assignment is also available. Once tickets have been assigned to an operator, they will receive email notifications in case you have selected this in the settings.

To assign one ticket open it up for editing and select **Edit Ticket** tab

Ticket Information
Ticket View
Edit Ticket

Ticket #BT60514
Back Reset Delete Ticket Save Ticket Save and Continue Edit

Edit Ticket

Subject *
Message *

Message from the Contact form
reagaerg

Department
Operator
Priority
Status

Technical Support
--please select--
--please select--
Alex
Pending

Here you can assign department or re-assign it if needed, assign one of the operators from the selected department.

You can also edit the message and the subject if needed.

To make bulk assignment open the list of tickets. Check the tickets to be assigned. Then select actions = **Assign to Department** and select the department. Press **Submit** button.

Help Desk Tickets

Page 1 of 1 pages | View 20 per page | Total 7 records found

Export to: CSV Export Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 2 items selected

Actions Assign to department Department Sales Department Submit

ID	Created On	Store	Customer	Department	Subject	Status	Replies	Priority	Actions	
Any	From: To:									
<input type="checkbox"/>	BT60514	Mar 13, 2012	Main Website Main Store English	arge@wegww.com		Message from the Contact form	Pending	0	Normal	Edit
<input type="checkbox"/>	DN69499	Mar 13, 2012	Main Website Main Store English	dsfs@sb.com		Message from the Contact form	Pending	0	Normal	Edit
<input checked="" type="checkbox"/>	YK21662	Mar 12, 2012	Main Website Main Store English	Anna IToris		Reply should be converted to ticket reply at 16.40	Closed	2	Urgent	Edit
<input checked="" type="checkbox"/>	PG74107	Mar 7, 2012	Main Website Main Store English	Anna IToris		Reply should be converted to ticket reply at 22.25!!!	Pending	0	Urgent	Edit
<input type="checkbox"/>	U84541	Mar 7, 2012	Main Website Main Store	Anna IToris	General Enquiries	Reply should be converted to ticket	Pending	0	Urgent	Edit

The same way tickets can be assigned to operators - check the tickets to be assigned. Then select actions = **Assign to Operator** and select the operator. Press **Submit** button.

4.3.3. Manage Tickets

Administrators, including operators, can apply any changes to the tickets - edit them, assign/un-assign them, change statuses manually, etc.

Some actions are available only when a ticket has been opened up for editing, while others can be applied in bulk.

When a ticket has been opened for editing, the following changes are available:

Ticket Information

Ticket View Edit Ticket

Ticket #MH81352 Back Reset Delete Ticket Save Ticket Save and Continue Edit

Edit Ticket

Subject * Please help me with the product

Message * I have an issue with the product, please help!

Department General Enquiries

Operator --please select--

Priority Normal

Status Closed

- **Subject** - administrators can change the subject of the ticket

- **Message** - administrators can change the message of the ticket
- **Priority** - priority can be set or changed
- **Status** - statuses are changed automatically depending on operators' and customers' actions, yet administrators can change them manually as well.

To apply bulk management open the list of tickets and check the ones you want to change. The following actions are available:

Help Desk Tickets

Page 1 of 1 pages | View 20 per page | Total 7 records found

Export to: CSV Export Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected

ID	Created On	Store	Customer	Department	Subject	Status	Replies	Actions
Any	From: To:							Delete Change status Change priority Assign to department Assign to operator
<input type="checkbox"/> BT60514	Mar 13, 2012	Main Website Main Store English	arge@wegvw.com	Technical Support	Message from the Contact form	Replied	1 Alex Normal	Edit
<input type="checkbox"/> DN69499	Mar 13, 2012	Main Website Main Store English	dsfs@sb.com	Technical Support	Message from the Contact form	Pending	0 Normal	Edit
<input type="checkbox"/> YK21662	Mar 12, 2012	Main Website Main Store English	Anna IToris	Sales Department	Reply should be converted to ticket reply at 16.40	Closed	2 Urgent	Edit
<input type="checkbox"/> PG74107	Mar 7, 2012	Main Website Main Store English	Anna IToris	Sales Department	Reply should be converted to ticket reply at 22.25!!!	Updated	0 Urgent	Edit
<input type="checkbox"/> U84541	Mar 7, 2012	Main Website Main Store English	Anna IToris	General Enquiries	Reply should be converted to ticket reply at 22.25	Replied	1 Alex Urgent	Edit
<input type="checkbox"/> MH81352	Mar 7, 2012	Main Website Main Store English	anna@itoris.com	General Enquiries	Message from the Contact form	Closed	1 Normal	Edit
<input type="checkbox"/> FK46147	Mar 7, 2012	Main Website Main Store	Anna IToris	General Enquiries	test	Closed	0 Normal	Edit

- Delete
- Change status
- Change Priority

4.3.4. Reply Tickets. Tickets' History

To reply a ticket operators open it up. There will be full information about the ticket displayed on the view mode.

Ticket Information area displays the date, status, operator assigned, and other information. It also displays the initial request's subject and body.

Below there is **Port a Reply** area, where operators enter their response. There is ability to upload images there (if this is selected in the settings).

Below there is **Ticket History** section. It displays all communication history within this ticket - all replies of both customer and operator(s).

Replies of operators and customers differ in color so that it is easier to percept. All replies within one ticket are collected in one chain. Both assigned operator and customer will receive email notifications when there are new replies available (if this has been selected in the settings).

Ticket Information

Ticket View

Edit Ticket

Ticket #JM73091

Back

Reset

Delete Ticket

Save Ticket

Save and Continue Edit

Ticket Information

Close Ticket

Created On: Mar 23, 2012 6:05:52 PM Status: Replied
Customer: Test Test (test9@test.com) Priority: Normal
Operator: Nadia (reassign) Department: Technical Support
Order #: order is not assigned Store: Main Website/Main Store/English

Please help me with the product that I have bought, order #123456

I have recently bough a product and have some issues with it. Can you please help?

Post a reply

Upload File :

Browse...

Submit Reply

Ticket History



Replied on: 2012-03-23 18:08:50

Operator: Nadia

[Edit](#) | [Delete](#)

Please turn it. There will be a small green button on the right. Press it and it will start working



Posted on: 2012-03-23 18:07:43

[Edit](#) | [Delete](#)

I do not know how to switch it on so that it works



Replied on: 2012-03-23 18:07:10

Operator: Nadia

[Edit](#) | [Delete](#)

Hi!

Can you please describe which issues you face with the product?

Thank you,

Support Department