

# **Purpletree Helpdesk - Installation and Configuration**

# Pre-requisites

- PHP v5.6 or above
- Ioncube Loader v6

# Installation Instructions

### Unpacking by composer

- Update Magento's composer.json
- If you haven't done so already, change to your environment root directory.

Enter the following commands to update it:

- composer require purpletree/helpdesk:1.0.0 --no-update
- composer update
- Wait for project dependencies to update

# Unpacking from zip file

• Unpack .zip file inside app/code/Purpletree/Helpdesk/ directory.

Folder Structure of extension in Magento2 would be like:

<Magento Root>/app/code/Namespce/Modulename/controller

<Magento Root>/app/code/Namespce/Modulename/block

#### ...Similarly other directories...





# **Installation Finalization**

From shell/command prompt, run following commands on Magento root directory:

php bin/magento setup:upgrade



# **Configuration instructions**

On successful installation, a new Menu and submenu will appear in Magento Admin panel with name of **Helpdesk.** 

It will have following sub menus:

- Tickets
  - All Tickets
- Settings
  - Departments
  - o Statuses
  - $\circ$  Configuration





# Initial Configuration and Enabling the Extension

- Go to Helpdesk > Configuration.
- In "General Configuration", Set "Module Enable" to Yes.
- Now Enter License key you get with this extension in License key field. (required field) If you haven't received license key, please contact our support team.
- E-mail Email id of admin for communicating with any customer. (required field)
- E-mail Notification to admin Send email to admin on each ticket generation and on each reply by Customer, set it to Yes or No
- E-mail Notification to Customer Send email to customer for each reply by admin, set it to Yes or No
- Important: After changing options make sure you refresh your Magento cache.

Note: Valid License Key is required to save any configuration changes. Please purchase the extension to get a valid License key. Contact <u>support@purpletreesoftware.com</u> for this.

Configuration				Save Config
GENERAL	~	General Configuration		$\odot$
CATALOG	~	Module Enable	Yes 🔹	
CUSTOMERS	~	[store view]	To be Validated	
SALES	~	[store view]	View if License is Validated or not.	
PURPLETREE	^	License Key [store view]	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Help Desk		<b>E-mail</b> [store view]	xxxxxxxxxxxxxxx@gmail.com Helodesk email for communication	
SERVICES	~	E-mail Notification to Admin	Yes	
ADVANCED	~	[store view] E-mail Notification to Customer	Yes 🔹	
		[store view]	No.	

support@purpletreesoftware.com



### **Managing Departments**

Add/Edit/Delete departments which can be assigned to any ticket.

Dep	artments	S			Q 🖡	💄 admin 🔻
					Add New De	partment
Search	h by keyword		Q	<b>Y</b> Fi	Iters O Default View 🗸 🏠 Columns 🗸	📩 Export 👻
Action	15 🔻	2 records found			20 <b>v</b> per page < 1	of 1 >
T	ID ↓	Title	Sort Order	Status	Created	Action
	1	Sales	1	Yes	Mar 7, 2017 11:33:15 AM	Select 🔻
	2	Support	2	Yes	Mar 7, 2017 11:33:15 AM	Select 🔻

- Add any new department just by clicking Add new Department on top right.
- To edit or delete the department from the list, Select action for the same.
- Advance Filter can be used if the department list is long.
- You can export list of Departments in CSV or XML Format.
- Set Status to Yes for department to use it on tickets.
- Set sort order of the department

Sales					🔍 🌲 💄 admin 🕶
	← Back Dele	te Department	Reset	Save and Continue Edit	Save Department
DEPARTMENT INFORMATION	Department Inforn	nation			
Department	Title *	Sales			
	Sort Order	1			
	Status	Yes 💌			



#### **Managing Statuses**

Add/Edit/Delete Status which can be assigned to any ticket.

Stat	uses				Q 🌲	💄 admin 🔻
					Add N	lew Status
Searci	h by keyword		Q	<b>Y</b> Filte	ers 💿 Default View 🔻 🏠 Columns 🗸	📩 Export 🔻
Action	ns 🔻	4 records found			20 • per page < 1	of 1 >
	ID ↓	Title	Sort Order	Status	Created	Action
	1	In Progress	2	Yes	Mar 7, 2017 11:33:15 AM	Select 🔻
	3	Closed	3	Yes	Mar 7, 2017 11:33:15 AM	Select 💌
	4	Urgent	4	Yes	Mar 7, 2017 11:33:15 AM	Select 🔻
	11	Open	1	Yes	Mar 7, 2017 11:33:15 AM	Select 💌

- Add any new status just by clicking Add new Status on top right.
- To edit or delete the status from the list, Select action for the same.
- Advance Filter can be used if the statuses list is long.
- You can export list of Statuses in CSV or XML Format.
- Set Active to Yes for any Status to use it on tickets.
- Set sort order of the status wpa wpa tester

In Progress				Q	🌲 🧘 admin 🔻
	← Back	c Delete Status	Reset	Save and Continue Edit	Save Status
STATUS INFORMATION	Status Information				
Status	Title *	In Progress			
	Sort Order	2			
	Active	Yes 💌			



#### **Admin Tickets view**

An Admin user can manage tickets generated by customers.

Tick	ets							Q 🌲	💄 admin 🔻
Searci	h by keyw	ord	Q			<b>T</b> Filters	Default '	view 🔻 👯 Columns 👻	🏝 Export ▼
Action	าร	<ul> <li>✓ 2 records found</li> </ul>					30 <b>•</b> p	ber page < 1	of 1 >
V	ID ↓	Subject	Ticket Number	Order ID	Priority	Department	Status	Created	Action
	53	Mouse not working	VPKU520461	123456	High	Sales	Open	Mar 10, 2017 4:58:37 PM	Select 🔻
	54	Keyboard not working	DIEI009270	1232	Medium	Support	Closed	Mar 10, 2017 4:59:58 PM	Select 💌

- View list of tickets generated by customers.
- To view or delete the ticket from the list, Select action for the same.
- Advance Filter can be used for long list of tickets.
- You can export list of Tickets in CSV or XML Format.

#### View/Reply to ticket by Admin

- There will be unique ticket number generated on ticket request by customer.
- All the communication chat between customer and admin will be visible here.
- If Customer attached any file or screenshot, same can be downloaded by admin.
- Ticket information is shown on right sidebar.
- Admin can reply from the text area.
- Admin can also attach any file with reply. File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif
- To change ticket information like Status, Department and Priority, change it from dropdown and click on Save button.



#### Ticket #VPKU520461



Delete Ticket

← Back

 Mouse not working
 Ticket Information

 Customer - demo3qtdemo@gmail.com Replied at March 10, 2017 11:28 AM
 Status: Open

 My Mouse is not working.My Mouse
 Status: Open

 Reported at: March 10, 2017 11:28 AM
 Department: Sales
 Order ID: #123456

 Admin - demo3qtdemo1@gmail.com Replied at April 10, 2017 9:52 AM
 Your Problem will be solved soon. Our representative will contact you regarding the same.
 House is a mouse is a mouse is not working the same.

Reply:	Change Ticket Information
	Status: Open 🔹
	Department: Sales 👻
	All Priority: High -
Browse No file selected. Note - File types allowed are pdf, doc. docx. xls. xlsx. csv. txt. ipg. ipeg. png. gif	Save

# **User Ticket Dashboard on Frontend**



Demo

Account Dashboard Account Information Address Book	Sup	port Ticket				
My Downloadable Products	ID #	Title	Publish Date	Status	Department	Action
My Orders Newsletter Subscriptions	53	Mouse not working	3/10/17	Open	Sales	View
Stored Payment Methods	54	Keyboard not working	3/10/17	Closed	Support	View
My Product Reviews						
Billing Agreements	2 Item(s)					
My Wish List						
Help Desk						

#### **Customer view for list of tickets**

- To generate Ticket customer must be logged in.
- On Customer Dashboard new menu will be added in the last as "Helpdesk".
- Customer can view list of tickets generated by them.
- Customer can view the ticket details by clicking on View button along with each ticket.

Account Dashboard	Generate Ticket	
Account Information		
Address Book	Enter all details for support.	
My Downloadable Products	Subject *	
My Orders	Earphones not working	
Newsletter Subscriptions		
Stored Payment Methods	Full Description *	
My Product Reviews	I ordered Apple earphones but i received defective earphone, please solve my issue as soon as possible.	
Billing Agreements		
My Wish List		
Help Desk	Priority	
	High	~



Department	
Support	~
Order No(If any)	
123456	
Attachment	
Browse No file selected.	
Note - File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif	
Submit	

#### Ticket creation by user

- To generate new ticket, click on "Create Support ticket".
- Enter Subject.
- Full Description of your problem.
- Priority urgency for the support.
- Department select from list.
- Order No if support is required for any particular order number, enter order no, else leave it blank.
- Add attachment to your support ticket.
- File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif
- Submit your ticket.

# View/Reply Ticket by user

- There will be unique ticket number generated on ticket request by customer.
- All the communication chat between customer and admin will be visible here.
- If Customer attached any file or screenshot, same can be downloaded by admin.
- Ticket information is shown on right sidebar.
- Customer can reply from the text area.
- Customer can also attach any file with reply.



• File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif

Account Dashboard	Ticket #PVPA087736	
Account Information		
Address Book	Earphones not working	Ticket Information
My Downloadable Products		
My Orders	Customer - demo3qtdemo@gmail.com Replied at April 10, 2017 11:48 AM	Status:
Newsletter Subscriptions	I ordered Apple earphones but i received defective earphone, please solve my issue as	Reported at: April 10, 2017
Stored Payment Methods	soon as possible.	Department: Support
My Product Reviews	Attachment Download File	Order ID: 123456
Billing Agreements		
My Wish List	Admin - demo3qtdemo1@gmail.com Replied at April 10, 2017 12:13 PM	
Help Desk	Our representative will be in touch with you shortly.	
	Attachment Download File	

Note: A valid license is required for the extension to function. Please contact <u>support@purpletreesoftware.com</u> if you have not received license after purchase.