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…

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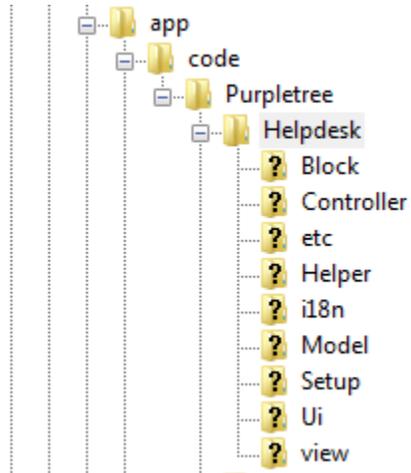
Installation Finalization

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
    - o All Tickets
- Settings
    - o Departments
    - o Statuses
    - o Configuration
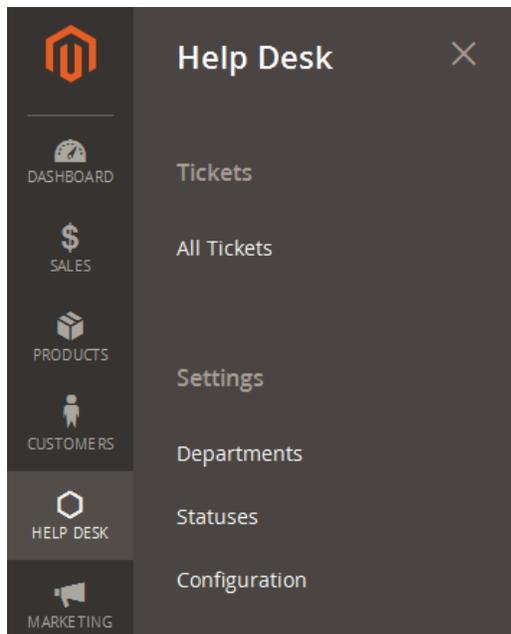
Initial Configuration and Enabling the Extension

- 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 support@purpletreesoftware.com for this.==

Managing Departments

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

- 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

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Managing Statuses

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

- 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

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Admin Tickets view

An Admin user can manage tickets generated by customers.

- 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.

PurpleTree Software

Ticket #VPKU520461

← Back   **Delete Ticket**

Mouse not working

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

My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.My Mouse is not working.

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.

Ticket Information

Status: Open

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

Reply:

[   ]

[Browse...] No file selected.
Note - File types allowed are pdf, doc, docx, xls, xlsx, csv, txt, jpg, jpeg, png, gif

[Submit]

Change Ticket Information

Status: [Open ▼]

Department: [Sales ▼]

Priority: [High ▼]

[Save]

User Ticket Dashboard on Frontend

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Support Ticket

Create Support Ticket

ID #	Title	Publish Date	Status	Department	Action
53	Mouse not working	3/10/17	Open	Sales	View
54	Keyboard not working	3/10/17	Closed	Support	View

2 Item(s)

Account Dashboard
Account Information
Address Book
My Downloadable Products
My Orders
Newsletter Subscriptions
Stored Payment Methods
My Product Reviews
Billing Agreements
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.

Generate Ticket

Account Dashboard
Account Information
Address Book
My Downloadable Products
My Orders
Newsletter Subscriptions
Stored Payment Methods
My Product Reviews
Billing Agreements
My Wish List
Help Desk

Enter all details for support.

Subject *

Earphones not working

Full Description *

I ordered Apple earphones but i received defective earphone, please solve my issue as soon as possible.

Priority

High

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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

Ticket #PVPA087736

Earphones not working

Customer - demo3qtdemo@gmail.com Replied at April 10, 2017 11:48 AM

I ordered Apple earphones but i received defective earphone, please solve my issue as soon as possible.

Attachment Download File

Admin - demo3qtdemo1@gmail.com Replied at April 10, 2017 12:13 PM

Our representative will be in touch with you shortly.

Attachment Download File

Ticket Information

Status:

Reported at: April 10, 2017 11:48 AM

Department: Support

Order ID: 123456

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

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