

Help Desk



Magento Extension User Guide

Official extension page: [Help Desk](#)



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

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To configure the module please go to Help Desk ->Settings

Helpdesk		
Enable HelpDesk	Yes	[STORE VIEW]
General		
Ticket Autoclose in	7	[STORE VIEW]
	▲ After how many days a ticket automatically goes from 'On Hold' to 'Closed'.	
Default Department	Support	[STORE VIEW]
Allows File Extensions	zip,rar,tgz,png,jpg	[GLOBAL]
	▲ zip,rar,tgz,png,etc.	
Max File Size	10	[GLOBAL]
	▲ in MB.	
Email Settings		
Archive Tickets		
Enable Tickets Archive by Cron	Yes	[GLOBAL]
Archive Tickets Older Than	21	[GLOBAL]
	▲ Days	
Ticket Status To Apply To	<ul style="list-style-type: none"> -- None -- Open On Hold Closed 	[GLOBAL]
Archive Ticket Frequency	Daily	[GLOBAL]

Specify after how many days tickets change status from 'On Hold' to 'Closed'

Set which formats are allowed for attachments. If the field is empty, all formats are allowed

Set archivation options:

- Specify # of days after tickets go to archive
- Select tickets with which statuses to archive
- Set how frequently tickets will be archived



Helpdesk		
General		
Email Settings		
Sender Name	<input type="text" value="Helpdesk Support"/>	[STORE VIEW]
Check Inbox Email Every	<input type="text" value="5"/> ▲ Minutes.	[GLOBAL]
Sender Email	<input type="text" value="helpdesk@emample.com"/>	[STORE VIEW]
Email Notification to	<input type="text" value="admin@example.com"/> ▲ Comma separated emails.	[STORE VIEW]
Ticket Reply Template	<input type="text" value="Ticket Reply Template (Default Template from L"/>	[STORE VIEW]
New Ticket Created by Customer to Customer	<input type="text" value="New Ticket Created by Customer to Customer ("/> ▲ Notification to customer.	[STORE VIEW]
New Ticket from Customer to Support	<input type="text" value="New Ticket from Customer to Support (Default"/> ▲ Notification to support.	[STORE VIEW]
New Ticket Created from Admin Panel to Customer	<input type="text" value="New Ticket Created from Admin Panel to Custo"/> ▲ Notification when agent creates a ticket from admin panel to customer.	[STORE VIEW]
New Ticket Created from Admin Panel to Admin	<input type="text" value="New Ticket Created from Admin Panel to Admin"/> ▲ Notification about ticket created from admin panel.	[STORE VIEW]
Status Update for Customer	<input type="text" value="Ticket Status Update to Customer (Default Tem"/> ▲ Notification for customer about ticket status update.	[STORE VIEW]
Department Update for Customer	<input type="text" value="Ticket Department Update to Customer (Defaul"/> ▲ Notification for customer about department change.	[STORE VIEW]
Autoclose in for Customer	<input type="text" value="Ticket Department Update to Customer (Defaul"/> ▲ Notification for customer about ticket status update.	[STORE VIEW]
Use Message Part from Inbox Emails	<input type="text" value="Text HTML"/> ▲ User html or plain text in Inbox Emails	[GLOBAL]

Archive Tickets

Specify sender name and email, send notifications to several emails at once

Set how often to check inbox - time in minutes

Choose the default templates for each type of notification and email format – html or plain text



2. Ticket priorities

Manage Priorities

[+ Add New Priority](#)







Page of 1 pages | View per page | Total 6 records found

[Reset Filter](#)

[Search](#)

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

Actions [Submit](#)

	Priority ID	Title	Status	Color	Action
Any	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	1	Normal	Enabled		Edit
<input type="checkbox"/>	2	Medium	Enabled		Edit
<input type="checkbox"/>	3	High	Enabled		Edit
<input type="checkbox"/>	4	Urgent	Enabled		Edit
<input type="checkbox"/>	5	Emergency	Enabled		Edit
<input type="checkbox"/>	6	Critical	Enabled		Edit

Create as many priorities as needed. You can also enable or disable priorities in bulk



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Support: <http://amasty.com/contacts/>

Priority Information

General Information

Edit Priority 'Medium'

[Back](#)[Reset](#)[Delete](#)[Save](#)[Save and Continue Edit](#)

priority Information

Title *

Medium

Color

FFB536

Status



Easily pick a color for each priority



3. Quick answering

Create macros for quick answering the most common questions

Manage Macros

[+ Add New Macro](#)

Page of 1 pages | View per page | Total 2 records found

[Reset Filter](#) [Search](#)

[Select All](#) | [Unselect All](#) | [Select Visible](#) | [Unselect Visible](#) | 0 items selected

Actions [Submit](#)

	Macro ID	Title	Text	Status	Action
Any <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	1	Hello + Have a nice day!	Hallo, Have a nice day! Best regards,	Enabled	Edit
<input type="checkbox"/>	2	Quick reply about phones availability	Hello , Thank you for the feedback. Unfortunately Phone X is not in stock yet, we are expecting it next week. Sorry for the inconvenience. Best regards,	Enabled	Edit



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

3. Quick answering

Macro Information

General Information

Edit Macro 'Quick reply about phones availability'

Back

Reset

Delete

Save

Save and Continue Edit

macro Information

Title *

Quick reply about phones availability

Macro Text *

Hello ,
Thank you for the feedback.
Unfortunately Phone X is not in stock yet,
we are expecting it next week.

Sorry for the inconvenience.

Best regards,

Enabled

Enabled

Specify macro's title and text. Only 'plain text' is allowed



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

4. Email accounts configuration

Manage Email Accounts

[+ Add New Email Account](#)

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

[Reset Filter](#)

[Search](#)

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

Actions [Submit](#)

	Email Account ID	Title	Host	User	Port	Protocol	SSL	Status	Action
Any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	1	gmail	mail.example.com	jey@example.com	993	IMAP	SSL	Enabled	Edit
<input type="checkbox"/>	2	hotmail	mail.example.com	head@example.com	993	IMAP	SSL	Enabled	Edit
<input type="checkbox"/>	3	yahoo	mail.example.com	hd@example.com	993	POP3	No	Enabled	Edit

Indicate all email accounts, from which you receive support emails or important notifications. You'll find these emails on the tickets grid



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

4. Email accounts configuration

Account Information

General Information

Specify your email accounts settings

Edit Email Account 'gmail'

[← Back](#) [Reset](#) [✖ Delete](#) [✔ Save](#) [✔ Save and Continue Edit](#) [Check Email](#) [Check Connection](#)

Email Account Information

Title *	<input type="text" value="gmail"/>
Host *	<input type="text" value="mail.example.com"/>
User *	<input type="text" value="jey@example.com"/>
Password *	<input type="text" value="pass1234"/>
Port *	<input type="text" value="993"/>
Protocol *	<input type="text" value="IMAP"/>
SSL	<input type="text" value="SSL"/>
Status	<input type="text" value="Enabled"/>



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

Manage Departments

[+ Add New Department](#)

Page of 1 pages | View per page | Total 4 records found

[Reset Filter](#) [Search](#)

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions [Submit](#)

	Department ID	Title	Status	Action
Any <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="checkbox"/>	1	Support	Enabled	Edit
<input type="checkbox"/>	2	Development	Enabled	Edit
<input type="checkbox"/>	3	Marketing	Enabled	Edit
<input type="checkbox"/>	4	Sales	Enabled	Edit

Divide your staff into departments. While creating a ticket clients can choose a ticket department destination. Thus your tickets will be in order



5. Store departments creation

Department Information

General Information

Edit Department 'Support'

[Back](#)[Reset](#)[Delete](#)[Save](#)[Save and Continue Edit](#)

Department Information

Title *

Agents

Available on *

Main Website**Madison Island**

English

French

German

Status

Set department title. Start typing agents' names to add them to the department. Specify for which store view a department is available



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

6. Tickets grid options

Manage Tickets

Display tickets from base or archive

+ Create New Ticket

Ticket From: Base

Adjust grid view to your needs using 'Manage columns' button

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

Manage Columns Reset Filter Search

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

Actions Submit

	Ticket ID	Title	Sender Name	Status	Department	Customer	Priority	Date	Last Activity	Action
Any								From:		
								To:		
<input type="checkbox"/>	AAA-003	Product doesn't work	Robert Nurbar (General)	Open	Support	Robert Ngia	Normal	Dec 4, 2015 4:42:33 AM	Dec 4, 2015 4:42:33 AM	View Ticket
<input type="checkbox"/>	AAA-002	Can't apply the coupon in cart	Haven Bangor (VIP Member)	Open	Support	Haven Bangor	Medium	Dec 3, 2015 4:26:29 AM	Dec 3, 2015 4:26:29 AM	View Ticket
<input type="checkbox"/>	AAA-001	When will my order be shipped?	Kate Williams (General)	Open	Support	Kate Williams	High	Dec 2, 2015 7:18:48 AM	Dec 2, 2015 7:18:48 AM	View Ticket

There's an option to mass archive or delete several tickets at once

If tickets are unread, you can see them highlighted with a bold font on the grid



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

6. Tickets grid options

Ticket Grid Manage Columns

Template: Default

Default Sorting by: Ticket ID

Save Template Save as New Template Cancel Delete Template

Label	Position	Visible
Ticket ID	2	<input checked="" type="checkbox"/>
Title	3	<input checked="" type="checkbox"/>
Sender Name	4	<input checked="" type="checkbox"/>
Status	5	<input checked="" type="checkbox"/>
Department	6	<input checked="" type="checkbox"/>
Customer	7	<input checked="" type="checkbox"/>
Agent	8	<input checked="" type="checkbox"/>
Priority	9	<input checked="" type="checkbox"/>
Sent from	10	<input checked="" type="checkbox"/>
Order	11	<input checked="" type="checkbox"/>
Date	12	<input checked="" type="checkbox"/>
Last Activity	13	<input checked="" type="checkbox"/>
Action	14	<input checked="" type="checkbox"/>

Choose how to sort tickets on the grid

Select which columns to display on the tickets grid. Set their positions and names



7. Ticket example

General Information

View Ticket 'Can't apply the coupon in cart' **See detailed ticket info** Back Save Update

Ticket General Information	Ticket Status	Ticket Additional Information
Ticket ID: AAA-002	Title *: Can't apply the coupon in cart	Sent From: Main Website Madison Island English
Sent by: Haven Bangor (VIP Member)	Priority *: Medium	Resolved?: <input type="checkbox"/>
Date Create: Dec 3, 2015 4:26:29 AM	Status *: Open	
Last Activity: Dec 3, 2015 4:26:29 AM	Department *: Support	
	Assign to *: admin	

Write Reply

CC:

Macro: Choose a Macro...

Email Body:

Attachment: No file selected.

Customer's name and group

Haven Bangor
VIP members

Posted on: Dec 3, 2015 4:26:29 AM

Hi.
I'm trying to buy this product <http://demo.amasty.com/helpdesk/men/shirts/french-twill-oxford-468.html> but the coupon EELS123 doesn't work, I can't apply it in cart.
Please help,
Thank you in advance
Haven

Easily change the following data right on the ticket:

- Subject
- Status
- Department
- Agent
- If the ticket is resolved or not

Handy reply form, where you can attach files, choose a macro and specify a CC

Ticket's body – here you see client's message and history



CREATE TICKET

TICKET INFORMATION

Title *

Sender Name *

Email *

Order #

Department *

Priority *

* Required Fields

This is how 'Create a ticket' page looks like

If a user is logged in, fields 'Name' and 'Email' will be filled in automatically

POST REPLY

Write Message *

Hi
 I'm trying to buy this product <http://example.com/men/shirts/oxford.html> ,
 but the coupon EELS123 doesn't work, I can't apply it in cart.
 Please, check if it is working.

Submit a ticket from a CMS page

Attachment No file selected.

Copy to my Email

Mark as Resolve



8. 'Create a ticket' CMS page settings

Page Information

Page Information


Content

Design

Meta Data

Specify page title, url and store view for 'Create a ticket' page

Edit Page 'Create New Ticket'

 Back

 Reset

 Delete Page

 Save Page

 Save and Continue Edit

Page Information

Page Title *

Create New Ticket

URL Key *

amhelpdesk-create-ticket

▲ Relative to Website Base URL

Store View *

All Store Views

Main Website

Madison Island

English

French

German

Status *

Enabled



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

8. 'Create a ticket' CMS page settings

Page Information

Page Information

Content

Design

Meta Data

Edit Page 'Create New Ticket'

 Back

Reset

 Delete Page

 Save Page

 Save and Continue Edit

Content

Content Heading

Create Ticket

 Show / Hide Editor

 Insert Widget...

 Insert Image...

 Insert Variable...

```
{{block type="amhelpdesk/ticket_view" is_cms_page=1}}
```

**Content settings for
"Create a ticket" page**



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

8. 'Create a ticket' CMS page settings

Page Information

Page Information

Content

Design

Meta Data

You can choose a layout for 'Create a ticket' page

If you have a custom theme, you'll see it in the dropdown and 'Create a ticket' page will fit in your custom theme

Edit Page 'Create New Ticket'

Back

Reset

Delete Page

Save Page

Save and Continue Edit

Page Layout

Layout *

1 column

Empty

1 column

2 columns with left bar

2 columns with right bar

3 columns

</action>

<action method="addCss"><name>css/amasty/amhelpdesk

/ticket_view.css</name></action>

</reference>

<reference name="content">

<block type="amhelpdesk/ticket_view" name="amhelpdesk.ticket.view"

is_cms_page="1" />

</reference>

elpdesk/ticket_view.js</file>

elpdesk/ticket_reply.js</file>

Custom Design

Custom Design From

Custom Design To

Custom Theme

-- Please Select --

Custom Layout

-- Please Select --

Custom Layout Update XML

rwd

default

default

iphone

modern

blank

default


base

default



8. 'Create a ticket' CMS page settings

Page Information

Page Information
Content
Design
Meta Data 

Edit Page 'Create New Ticket'

Meta Data

Keywords

support, customer care, helping users

Description

Ask us any question or give feedback - it will make us happy

**Specify meta data for
'Create a ticket' page**



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

9. Other ticket submission opportunities

MY ACCOUNT

- ACCOUNT DASHBOARD
- ACCOUNT INFORMATION
- ADDRESS BOOK
- MY ORDERS
- BILLING AGREEMENTS
- RECURRING PROFILES
- MY PRODUCT REVIEWS
- MY WISHLIST
- MY APPLICATIONS
- NEWSLETTER
- SUBSCRIPTIONS
- MY DOWNLOADABLE PRODUCTS

AMASTY HELPDESK

MY TICKETS

CREATE NEW TICKET

1 Item(s) SHOW: 10 ▾

TICKET ID	TITLE	DEPARTMENT	STATUS	PRIORITY	AGENT	LAST ACTIVITY
AAA-001	When will my order be shipped?	Support	Open	High	TimJohnson	Dec 2, 2015 7:18:48 AM

1 Item(s) SHOW: 10 ▾

A new tab 'Amasty HelpDesk' is added to customer accounts. Clients can see their tickets or create new requests

Submit a ticket from customer account



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

MY ACCOUNT

ACCOUNT DASHBOARD
ACCOUNT INFORMATION
ADDRESS BOOK

MY ORDERS

BILLING AGREEMENTS
RECURRING PROFILES
MY PRODUCT REVIEWS
MY WISHLIST
MY APPLICATIONS
NEWSLETTER
SUBSCRIPTIONS

ORDER #145000006 - PENDING

[Reorder](#) | [Print Order](#) | [Create Ticket](#)

About This Order: **Order Information**

ORDER DATE: DECEMBER 17, 2015

SHIPPING ADDRESS:

Kate Williams
New York
New York, New York, 10001
United States
T: +8549854256

SHIPPING METHOD:

United Parcel Service - Ground

**Submit a
ticket from
customer
account**

**Customers can also
create tickets on the
order view page**



9. Other ticket submission opportunities

COMPANY

ABOUT US

CONTACT US

CUSTOMER SERVICE

PRIVACY POLICY

CONTACT US

Name *

Email *

Telephone

Comment *

* Required Fields

**Submit a
ticket from
front end**

SUBMIT

Add email which you use to receive requests from Contact Us form to 'Manage email accounts' tab. After that you'll get all requests as tickets



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

9. Other ticket submission opportunities

Sales – Orders – View order

Order View

Order # 145000004-1 | May 3, 2014 5:36:47 PM

Back

Reorder

Create Ticket

Information

Invoices

Credit Memos

Shipments

Comments History

Transactions

Order # 145000004-1 (the order confirmation email was sent)

Order Date **May 3, 2014 5:36:47 PM**

Order Status **Canceled**

Purchased From **Main Website
Madison Island
English**

Link to the Previous Order [145000004](#)

Account Information

Customer Name [Jane Doe](#)

Email janedoe@example.com

Customer Group **General**

Submit a
ticket from
back end

HelpDesk – Manage Tickets

Manage Tickets

Create New Ticket

Ticket From: Base

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

Manage Columns

Reset Filter

Search

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

Actions

Submit

	Sender Name	Status	Department	Customer	Agent	Priority	Sent from	Order	Date	Last Activity	Action
Any									From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	
<input type="checkbox"/>	Kate Williams (General)	Open	Support	Kate Williams	TimJohnson	High	Main Website Madison Island English		Dec 2, 2015 7:18:48 AM	Dec 2, 2015 7:18:48 AM	View Ticket



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

10. Email notification settings

Transactional Emails

[+ Add New Template](#)

Page of 1 pages | View per page | Total 8 records found

[Reset Filter](#) [Search](#)

ID	Template Name	Date Added	Date Updated	Subject	Template Type	Action
		From: <input type="text"/> To: <input type="text"/>	From: <input type="text"/> To: <input type="text"/>	<input type="text"/>	<input type="text"/>	
1	New Ticket Created by Customer to Customer	Dec 18, 2015 5:50:49 AM	Dec 18, 2015 5:50:49 AM	{{var subject}}	HTML	Preview
2	New Ticket Created from Admin Panel to Admin	Dec 18, 2015 5:51:08 AM	Dec 18, 2015 5:51:08 AM	{{var subject}}	HTML	Preview
3	New Ticket Created from Admin Panel to Customer	Dec 18, 2015 5:51:28 AM	Dec 18, 2015 5:51:28 AM	{{var subject}}	HTML	Preview
4	New Ticket from Customer to Support	Dec 18, 2015 5:51:42 AM	Dec 18, 2015 5:51:42 AM	{{var subject}}	HTML	Preview
5	Department Update for Customer	Dec 18, 2015 5:52:07 AM	Dec 18, 2015 5:52:07 AM	{{var subject}}	HTML	Preview
6	Autoclose in for Customer	Dec 18, 2015 5:52:47 AM	Dec 18, 2015 5:52:47 AM	{{var subject}}	HTML	Preview
7	Ticket Reply	Dec 18, 2015 5:53:07 AM	Dec 18, 2015 5:53:16 AM	{{var subject}}	HTML	Preview
8	Status Update for Customer	Dec 18, 2015 5:53:37 AM	Dec 18, 2015 5:53:37 AM	{{var subject}}	HTML	Preview

There are 8 built in templates, which you can use to send email notifications to your customers. You can also customize them according to your needs

Templates preview is available



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>

New Email Template

1.

Load default template

Template *
Locale *

Template Information

Template Name *
Template Subject *
Template Content *
Template Styles

- New Invoice for Guest
- New Order
- New Order for Guest
- New Shipment
- New Shipment for Guest
- New Ticket Created by Customer to Customer**
- New Ticket Created from Admin Panel to Admin
- New Ticket Created from Admin Panel to Customer
- New Ticket from Customer to Support
- New account
- New account confirmation key
- New account confirmed
- Newsletter subscription confirmation
- Newsletter subscription success
- Newsletter unsubscription success
- Order Update
- Order Update for Guest
- Payment Failed
- Product alerts Cron error
- Product price alert

Choose the template you'd like to use for email notifications

New Email Template

2.

Load default template

Template *
Locale *

New Ticket Created by Customer to Customer
English (United States)

Load Template

Click 'Load template' button to load the template



10. Email notification settings

Template Information	
Used as Default For	System -> Configuration -> HelpDesk -> Email Settings -> New Ticket Created by Customer to Customer (GLOBAL)
Template Name *	<input type="text"/>
Template Subject *	<input type="text" value="{{var subject}}"/> Insert Variable...
Template Content *	<pre>Dear {{var sender_name}},
 Thank you for submitting a request. This is an automated response confirming the receipt of your ticket. Our team will get back to you as soon as possible. When replying, please make sure that the ticket ID is kept in the subject so that we can track your replies.

 Ticket information:
 Ticket ID: {{var ticketid}}
 Subject: {{var subject}}
 Department: {{var department}}
 Status: {{var status}}
 Priority: {{var priority}}
 {{if order_increment_id}}
 Order #: {{var order_increment_id}}
 {{/if}}
 {{if customer_id}}
 You can check the status of or update this ticket online at:

 Link to Ticket
 {{/if}}

 Best wishes.

 Customer Support Team of {{var website}}</pre>
Template Styles	<input type="text"/>

The data will be filled in automatically



Thank you!

Should you have any questions or feature suggestions, please contact us at:

<http://amasty.com/contacts/>

Your feedback is absolutely welcome!



User Guide: [Help Desk](#)

Support: <http://amasty.com/contacts/>