

# Help Desk for Magento 2.0

## USER GUIDE

Version 1.0

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🌐 <https://exto.io/help-desk-for-magento-2.html>



Full-featured customer support solution integrated with your Magento store introducing new custom interfaces and integrating store data with tickets

◆  
Enrich user experience and increase support staff effectiveness

◆  
Features a Mobile interface specially crafted to serve your customers' demands

Includes Email Fetching and full email integration providing you with complete 2-way sync of your email accounts with Exto Help Desk by IMAP or POP3.

◆  
Provides a Contact form integration, External View Link, and Internal Communications Channel

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# 1. Quick Start

## 1.1 Installation

1. Back up your web directory and store database. You can make backup copies with any tool you find appropriate. If you are going to use the native Magento backup function, then navigate to:

Systems > Tools > Backups

and make **System** and **Database** backups

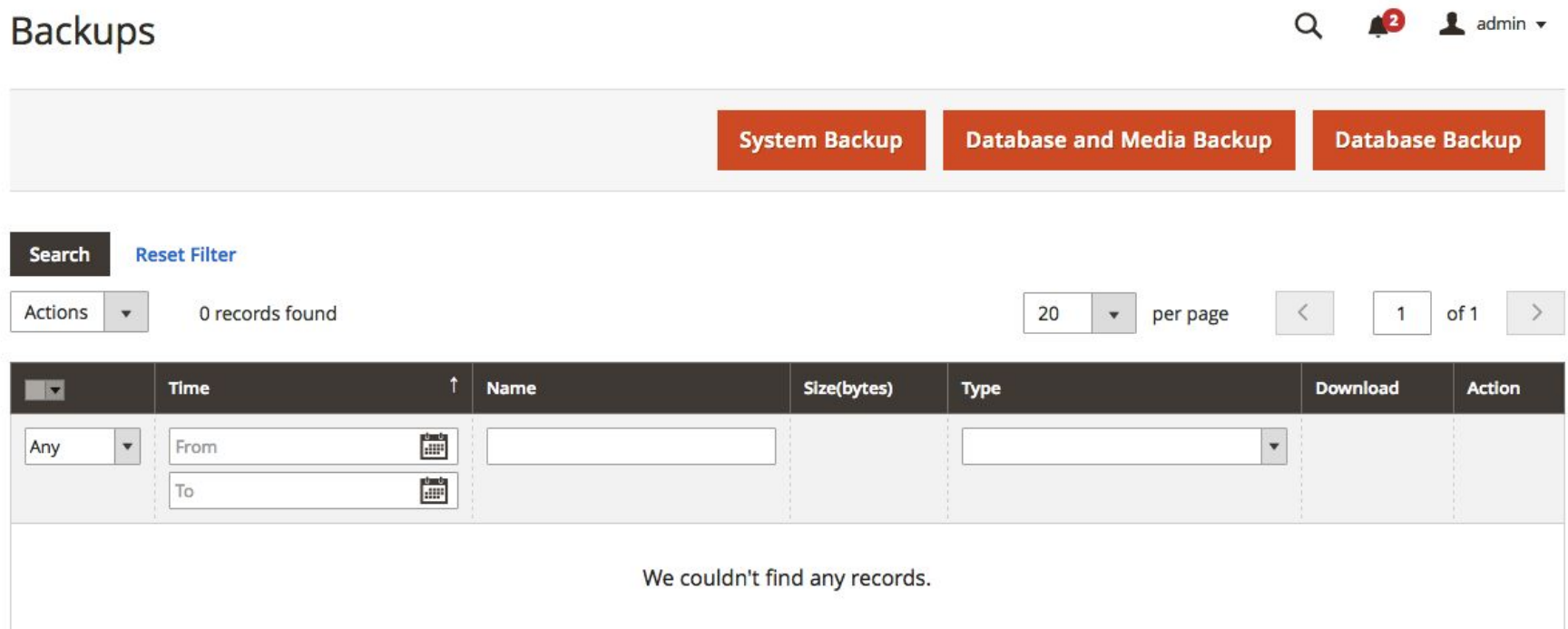


Image 1. Create backups

2. Download the Exto Help Desk installation package.
3. Upload the contents of the Exto Help Desk installation package to your store root directory.
4. In the SSH console of your server navigate to your store root folder:

```
cd path_to_the_store_root_folder
```

Then run:

```
php -f bin/magento module:enable Exto_Helpdesk
```

Next run:

```
php -f bin/magento setup:upgrade
```

Then run:

```
php -f bin/magento setup:static-content:deploy
```

Finally run:

```
php -f bin/magento cache:clean
```

```
php -f bin/magento cache:flush
```

Flush the store cache, log out from the backend and then log in again.

## 1.2 Configuration

### 1.2.1 Viewing and Adding Ticket Agents

[Customers](#) > [Extio Help Desk](#) > [Agents](#)

Help Desk agents are company employees responsible for assisting customers with their needs. Since customer concerns vary in nature (eg. Product concerns, Delivery, Refunds, etc), agents can come from different departments (eg. Accounting, Logistics, Product).

Admin users can view, add, and modify existing agents in the backend. To edit information for an existing agent, click on the **Edit** link. If adding a new agent, click on the **Create New Agent** button.

To add a new agent, fill out the necessary information then click on **Save**.

New Agent Field	Description
<b>Agent Account</b>	Admin user account which would be associated with the agent. A user can be assigned to multiple agent accounts.
<b>Name/Title</b>	Name and Title for the agent visible to the frontend
<b>Email</b>	Frontend email address
<b>Can see tickets of other agents</b>	<b>Yes/No</b> - Yes: Agent is capable of seeing all tickets, No: agents will only see the tickets assigned to their account
<b>Email Signature</b>	Corresponding email signature for the agent

Sample:  
Ü[]}À{ ã@Á  
Ü`]][]!ó] ^&ãð óÁ

**General Information**

Agent Account: admin admin (admin)

Name/Title \* Ron Smith  
[Localize](#)

Email \* rsmith@mystore.com

Can see tickets of other agents:  No

Email Signature \* Ron Smith, Support Specialist  
[Localize](#)

Image 2. New agent form

Once done saving the agent, the message *Í5[ YbhÌ Ug'VYYb'gUJ YXÍ* will be shown.

### 1.2.2 Viewing and Adding Departments

[Customers](#) > [Exto Help Desk](#) > [Departments](#)

A Department represents any group in your business that caters to specific customer concerns (eg. Accounting, Logistics, Product). Each Department can be composed of one or several agents.

Admin users can view all existing departments in the backend. To edit information for an existing department, click on the **Edit** link. If adding a new department, click on the **Add New Department** button.

To add a new department, fill out the necessary information then click on **Save**.

New Department Field	Description
<b>Title</b>	Department Name, e.g. "Sales"
<b>Head Agent</b>	Choose the Head Agent for the department. This agent will be default assignee for the department tickets.
<b>Other Department Agents</b>	Select other agent(s) for this department.
<b>Display on Frontend</b>	<b>Yes/No</b> - Choose whether customers should be able select this department on the frontend

**General Information**

**Title \***

[Localize](#)

**Head agent**

**Department agents**

- Alex Mayer
- Ron Smith**
- Trixie Lindstrom**
- Donna Lee**

**Display on frontend**  Yes

Image 3. New department form

Once done saving the agent, the message *Í 8 YdUfha Ybh\ Ug'VYYb'gUj YXÍ* will be shown.

### 1.2.3 General Settings

[Customers](#) > [Exto Help Desk](#) > [Settings](#)

Fill-out the following information to indicate the Head Agent and to declare the integration to the Contact Form.

General Settings Field	Description
<b>Head Agent</b>	This account will be default assignee for all incoming tickets
<b>Integrate with the Contact Form</b>	<b>Yes/No</b> - If Yes, then converts all requests sent from the native Magento contact form into Help Desk tickets

### 1.2.4 Email Fetching Configuration

[Customers](#) > [Exto Help Desk](#) > [Settings](#)

Enable email fetching to implement a support desk solution with full email integration.

Through email fetching, customers and agents can reply directly from their mailboxes and the system will parse all content into the right tickets threads or create new ones as needed.

Fill out the fields below to configure the store's email fetching settings:

Email Fetching Fields	Description
<b>Enable Email Fetching</b>	<b>Yes/No</b> - If Yes, all messages sent to the configured email are automatically fetched and included as part of ticket information, or create a new ticket. Otherwise, emails will not be fetched.
<b>Split Line Message</b>	Message included in the email to signify a new message Sample: <code>Ú[æ^Á]^Á[~!Á^]~Á[ç^Á@Á]^Á</code>
<b>Protocol</b>	Choose from <b>IMAP/POP3</b> . Default value is <b>IMAP</b>
<b>Host</b>	
<b>Port</b>	Indicate applicable port. 993 for IMAP SSL, 143 for IMAP TLS, 110 for POP3 and 995 for POP3 SSL by default.
<b>Email Address</b>	An email address for Help Desk to fetch messages from. This address must NOT be used for any other aim other than collecting the Help Desk mail.
<b>Login</b>	
<b>Password</b>	
<b>Encryption</b>	Choose from <b>SSL/TSL/None</b>

**IMPORTANT NOTICE**

If email fetching is enabled, make sure the Inbox folder of the configured email account is empty. Move the entire content to another folder if it is not empty. The email address must NOT be used by any other person or system.

To validate connection to email gateway, click on the **Test Connection** button right below the **Encryption** configuration. The message *Í Gi VVVggZ ``miVcbbYVWYX'Í* will be shown if testing is successful or *Í 7cbbYVWjcb`Yffc'Í* for a failed testing.

Click on **Save Config** once done.

### 1.2.5 Modifying Email Templates

[Marketing](#) > [Communications](#) > [Email Templates](#)

The Exto Help Desk extension comes with default email templates corresponding to actions performed by customer or agent.

The following actions have a corresponding email template configurations available:

Action	What the notification template includes
<b>New message by agent to customer</b>	Notifies customer about a new reply by agent
<b>New message by customer to agent</b>	With link to view ticket details from backend
<b>New message by customer to customer</b>	Ticket update notification
<b>New ticket by agent to customer</b>	Notifies customer about a new ticket created by agent
<b>New ticket by customer to agent</b>	Notifies the assigned (or default) agent about new ticket by customer
<b>New ticket by customer to customer</b>	Acknowledgement of new ticket
<b>Ticket assigned to agent</b>	Notification for agents that they have a new assigned ticket

To edit default templates, click on the **Add New Template** button.

Select a specific template from the dropdown menu then click on **Load Template**.



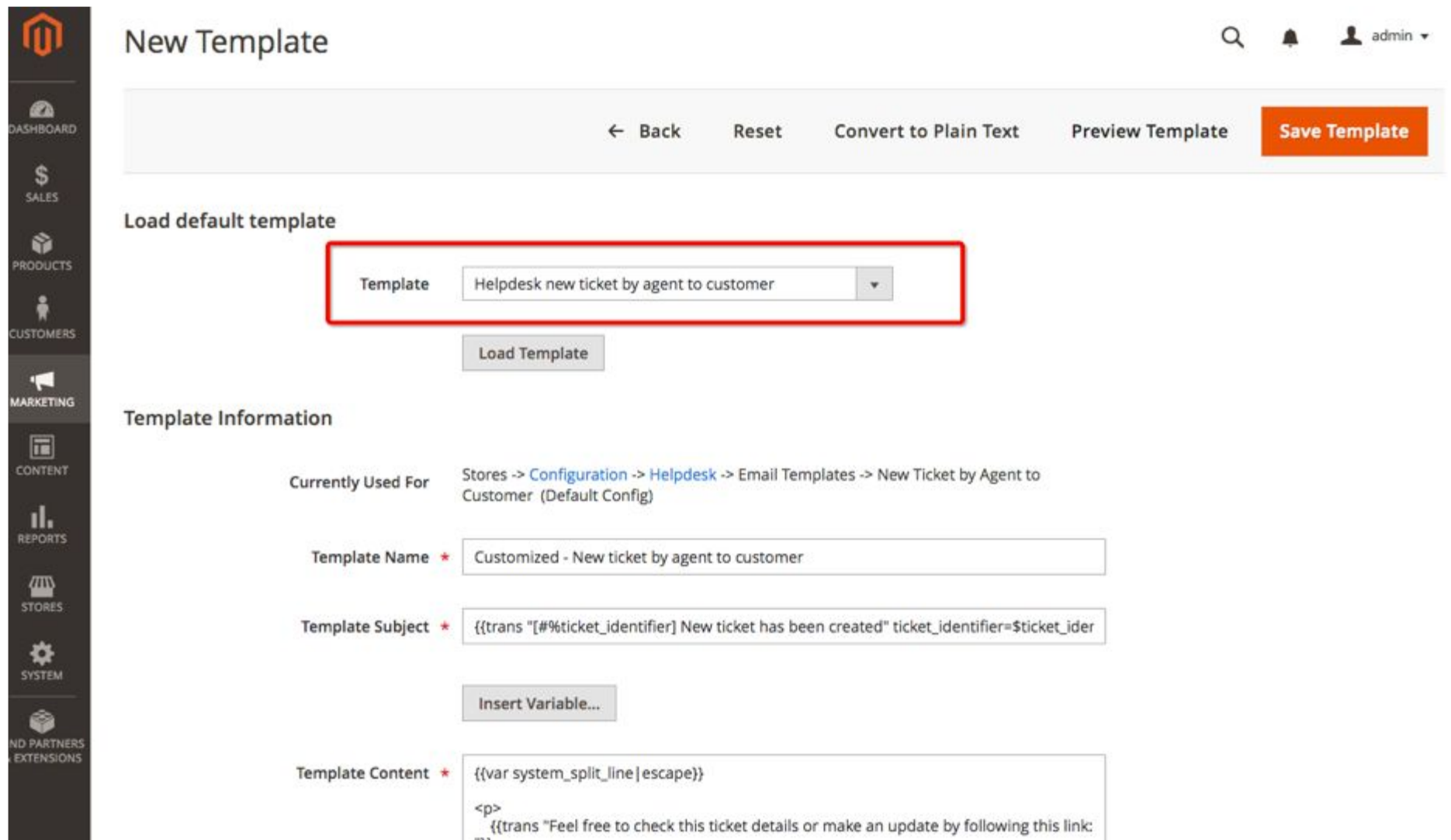


Image 4. Editing Email Templates

Admin users can also modify variables used in the template by clicking on the **Insert Variable** button. Click on a variable to include in the email template.

#### Template Variables

- [System Split line](#)
- [Ticket Identifier](#)
- [Ticket Subject](#)
- [Ticket Url](#)
- [Ticket Order Id](#)
- [Ticket Priority](#)
- [Ticket Status](#)
- [Ticket Customer Name](#)
- [Ticket Customer Email](#)
- [Ticket Customer Formatted name](#)
- [Ticket Initial message content](#)
- [Agent Name](#)
- [Agent Email](#)
- [Agent Email Signature](#)

Image 5. Available Variables

For example, use the variables **ticket\_identifier** and **agent\_name** to include ticket ID and agent name in the template. Click on **Save Template** once done.

```
Template Content * {{var system_split_line | escape}}  
  
<p>  
  {{trans "Feel free to check this ticket details or make an update by following this link:  
  "}}  
  <a href="{{var ticket_url}}" title="{{var ticket_identifier | escape}}">  
    {{var ticket_identifier | escape}}  
  </a>  
</p>  
<p>-----</p>  
<p>  
  <strong>{{trans "Ticket details:"}}</strong>  
</p>  
<p>  
  {{var ticket_subject | escape}}  
</p>  
<p>  
  {{var ticket_initial_message_content | escape | nl2br}}  
</p>  
<p>  
  {{var ticket_customer_name | escape | nl2br}}
```

Image 6. Sample Email Template Content

### 1.2.6 Assigning Email Templates

[Customers](#) > [Exto Help Desk](#) > [Settings](#)

Choose to use the existing default templates by clicking on the checkbox for the **Use System Value** or use the dropdown to select a customized template.

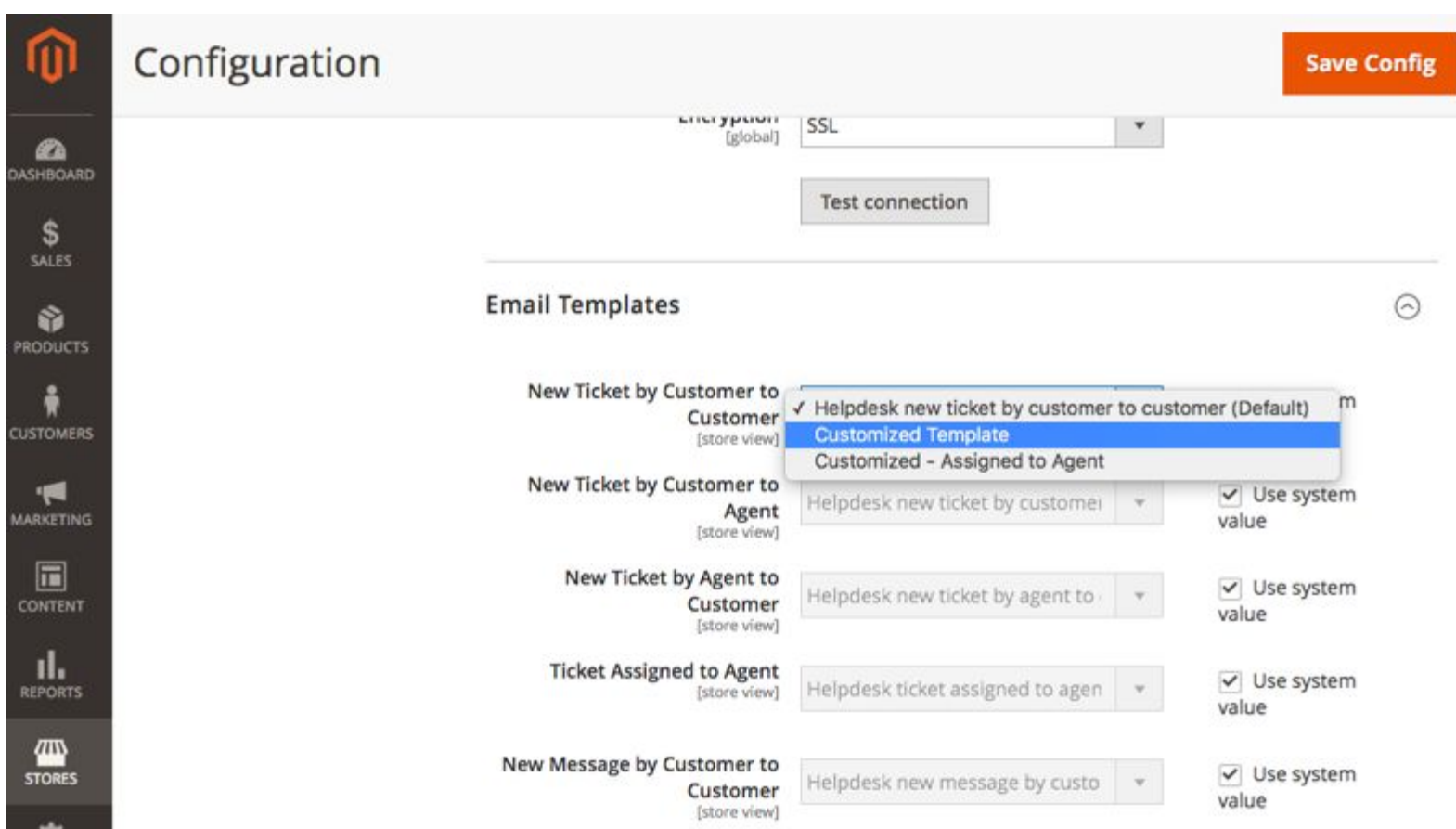


Image 7. Assigning Email Templates

### 1.2.7 Email Guidelines

When an unread message is discovered in the email fetching account, this will be treated as a part of an existing ticket or of a new request following the conditions below:

- If the message has a subject line with a valid ticket ID in square brackets, e.g. “[XXX-99999]” and comes from the customer email, associated with this ticket, then the message contents will be added to the open ticket associated to it. If these conditions are satisfied, but the ticket is already closed, then the system will create a new ticket.
- If the message is not connected to an existing ticket, then the system will create a new ticket with the following parameters:
  - Email subject becomes the ticket subject
  - Mail body becomes the first message of the ticket
  - If the sender exists as a Magento account (emails match) then the ticket is created on behalf of the account. Otherwise, the system will create the ticket as a guest.

If sending a new agent reply, the “From” field is filled in with the agent details, “reply-to” with email fetching account details. In our example below, the agent is Ron Smith with email rsmith@mystore.com address. The fetching account details show the configured email tickets@mystore.com.

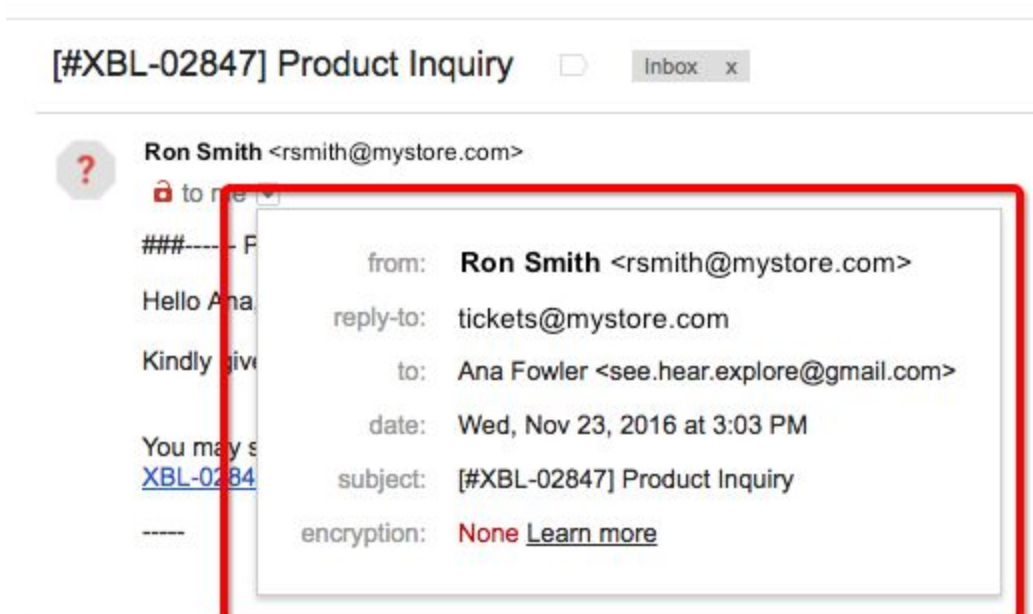


Image 8. Email Settings

## 2. Admin Area

### 2.1 Viewing Tickets

Customers > Exto Help Desk > Tickets

Tickets can be created from several channels:

- Customer’s account: My Account > Help Desk
- Customer’s account: My Account > Orders > Order > Submit Support Ticket
- The native Magento contact form (if configured)
- By admin from the backend
- By an email sent to the email account configured in Email Fetching section

Creating tickets from the frontend customer account will be discussed in section 3.3.

**NOTICE**

All new tickets are created with status New and Normal priority, unless the priority is defined by customer.

Here is a sample ticket grid view:

Ticket ID	Assignee	Department	Customer	Order ID	Subject	Status	Priority	Store View
RHB-34006	Ron Smith	Customer Support	Ana Fowler <see.hear.explore@gmail.com>		Product Inquiry	New	Normal	Main Website Main Website Store Default Store View

Image 9. Admin Tickets Grid

## 2.2 Creating Tickets via Backend

[Customers](#) > [Extio Help Desk](#) > [Tickets](#)

Once on the Tickets Grid, click on the **Create New Ticket** button.

Fill out the following fields with corresponding information:

Create Ticket Field	Description
<b>Assignee</b>	Leave the field as “Unassigned” or select an assignee. If set to “Unassigned”, then nobody will receive email notifications about customer replies, however anyone from the backend will be able to respond

<b>Subject</b>	
<b>Status</b>	Default value is 'Open' but admin user indicate current ticket status as Open/Awaiting Response/Resolved
<b>Customer Email</b>	If the email address listed here matches with an existing customer account, the ticket will be linked to the account
<b>Customer Full Name</b>	
<b>Priority</b>	All tickets are created with default 'Normal' priority but admin user can indicate Low/If Time/Normal/High/Urgent

Here is a sample of the **Create New Ticket** page. Click on the **Save** button once done.

Once the ticket is created, page will be directed to the edit ticket form. The new ticket is now created with a unique Ticket ID with the format "XXX-NNNN" where X are consonant letters and N are numbers.

The screenshot displays the 'Create New Ticket' page in the Exto Help Desk backend. The ticket title is '#DQH-70433 Product Recommendation (Open)'. The interface includes a sidebar with navigation options like Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area has tabs for 'Customer message' and 'Internal note'. A 'Customer message' form is visible with a 'Save as Awaiting Response' button. To the right, there are dropdown menus for 'Order' (Unassigned), 'Priority' (Normal), and 'Assignee' (Ron Smith). On the far right, a customer profile for 'Ana Fowler' is shown, including her address and contact information. Below the profile, there are sections for 'All customer orders' and 'Other tickets', each displaying a list of related items.

Image 10. New Ticket created via backend

## 2.3 Updating Tickets

### 2.3.1 Via Backend

Customers > Exto Help Desk > Tickets

Find the corresponding ticket and click on the **View** link.

Customer	Order ID	Subject	Status	Priority	Messages (number of)	Created ↑	Last message	Rating	Action
Lisa Fields <lisaf@gmail.com>	000000007	Product Inquiry	Open	Normal	0	Nov 22, 2016 6:15:55 AM			<a href="#">View</a>

Image 11. Editing Tickets via the Ticket Grid

Agents can post reply and update any ticket details. The message *ÍH YÍjW\_Yh\ Ug`VYYb`i dXUHxÍ* will be shown once the updated ticket is saved.

Agents can reply to the customer inquiry and once they save the ticket changes, the corresponding message will be shown on the customer's account and trigger an email.

Image 12. Updating ticket information and replying to customer inquiry

For internal communication, agents can add internal messages visible only in the backend. If agent did not add any form of message (internal or towards customers) or if they add a message and change field values, system messages (visible only in the backend) will be added to the ticket.

The system message consists of agent name, date, and a description of the previous and current values of the edited fields.

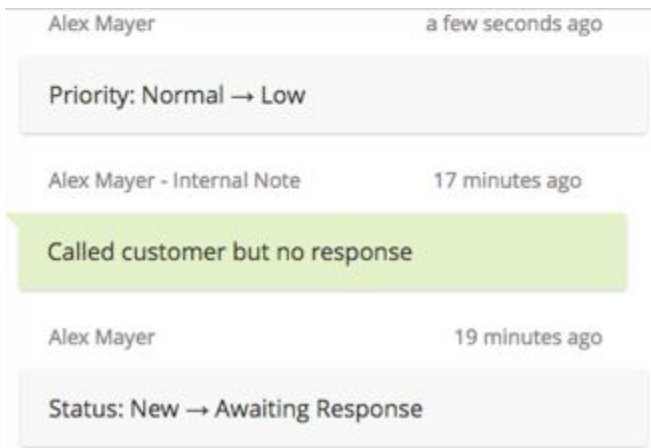


Image 13. Sample Internal Notes and System Messages

### 2.3.2 Via Email Reply

If email fetching is configured, agents can reply directly to the customer's email using their mailbox. The replies will be fetched and automatically included in the ticket.

#### NOTICE

Make sure that the "Reply-to" email field is set to your email fetching account. The "From" email field will be automatically set to the sender address.

## 3. Customer Area

### 3.1 Viewing existing tickets

Customers can view their existing tickets in the **Help Desk** section once they login to their account.

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

## Helpdesk

Ticket #	Subject	Order	Department	Status	Priority	Last message	Created
RHB-34006	<a href="#">Product Inquiry</a>		Customer Support	Awaiting Response	Normal	Question regarding product war...	Nov 24, 2016
DHK-15360	<a href="#">Product Recommendation...</a>		Customer Support	Awaiting Response	Low	Which shoes would you recommen...	Nov 25, 2016

[New request](#)

Image 14. Customer View List of Tickets

Customers should click on the **Subject** name to view ticket contents.

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

## [DHK-15360] Product Recommendation

Status: **Awaiting Response**

Priority: **Normal**

Rate this ticket: ☆☆☆☆☆

Post a message:

[Choose Files](#) No file chosen

[Submit](#)

Alex Mayer

18 minutes ago

Compare Products

You have no items to compare.

Hi Ana,

We would like to give you a call to get a further understanding of your running shoes needs. Kindly send us your contact number and we will get in touch with you.

Image 15. Customer Ticket View



Customers who have no existing account or who are signed out of their store account can still view tickets using External Ticket View. The link is sent to them in the email.

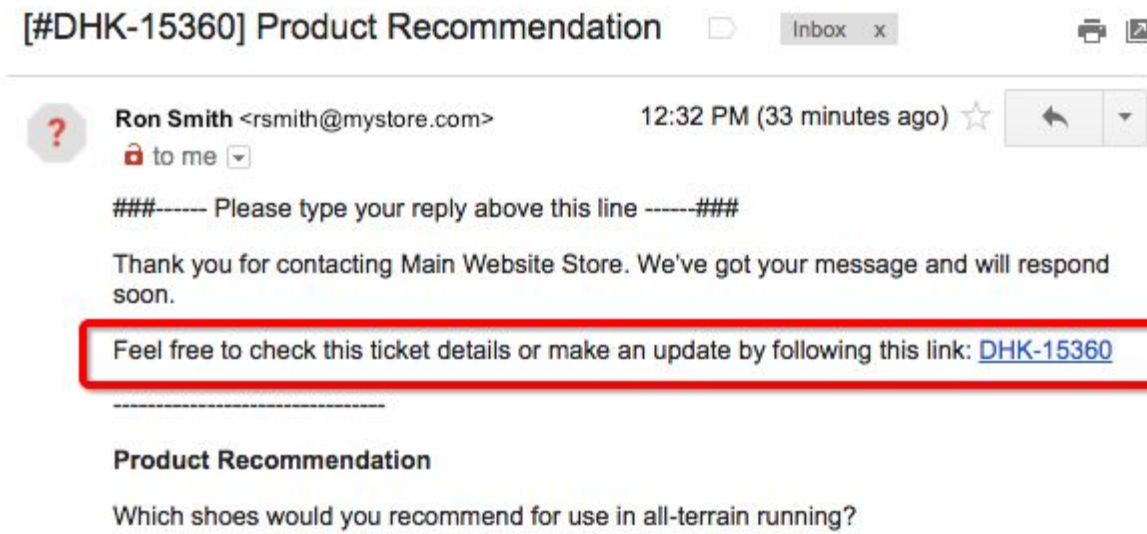


Image 16. Customer email and External Link View

### 3.2 Editing existing tickets

Customers can open the ticket and use the **Post a Message** section to update a ticket. Customers also have the option to rate the service provided to them for the corresponding ticket.

Type a message and include an attachment if needed. Once done, Click on **Submit** to update the ticket.

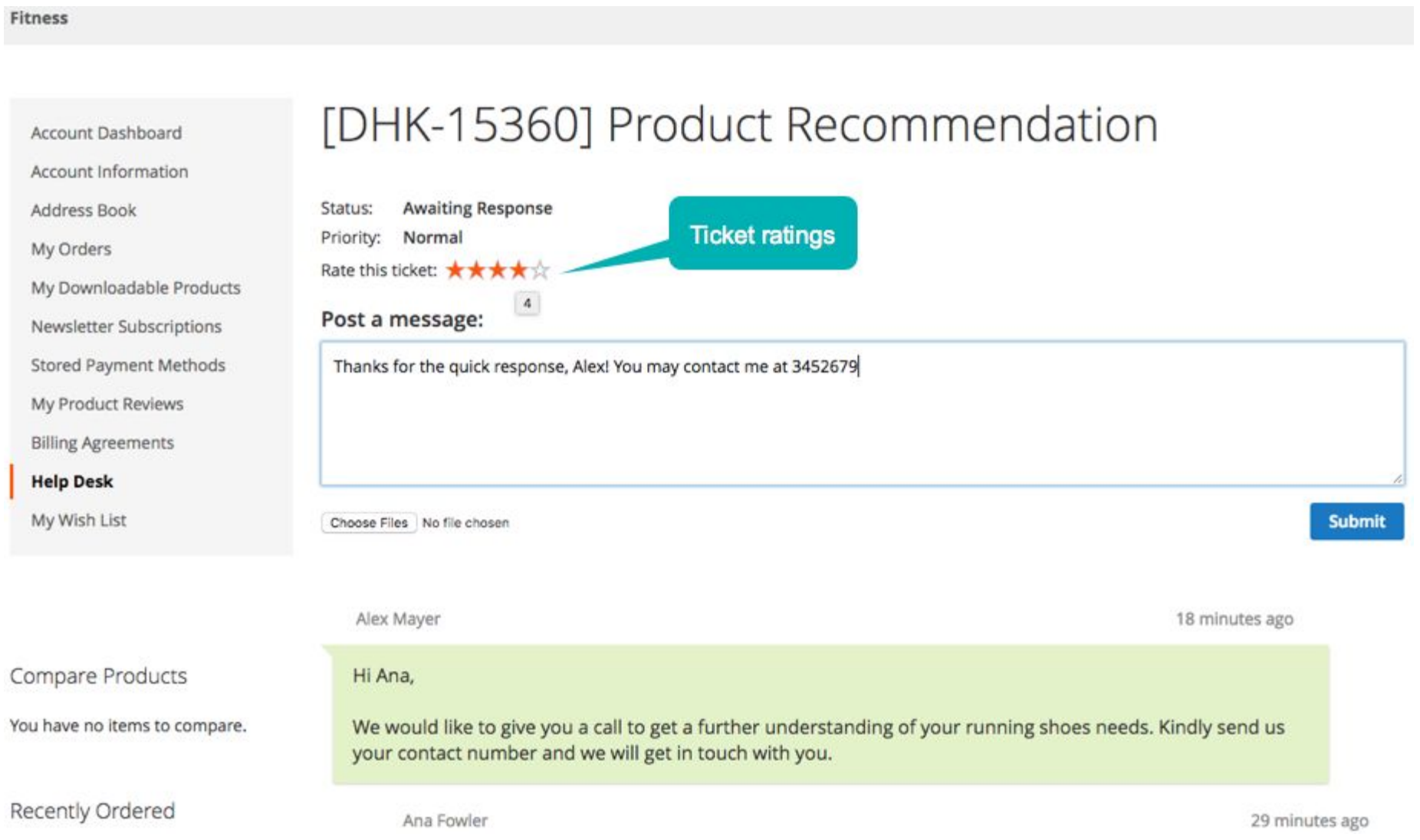


Image 17. Updating Ticket

The system will show *í A YggUf Y\ Ug VYYb UXXYX'gi WYggZ `mf* once the new message is posted.

### 3.3 Creating new tickets

Customers (both with existing accounts and guests) can create new tickets through the following ways:

- Through the **New request** button in the Help Desk menu
- By clicking on the **Submit Support Ticket** link on a corresponding order
- By submitting a message using the **contact form** of the website (if configured)
- By **sending an email to the fetching account**

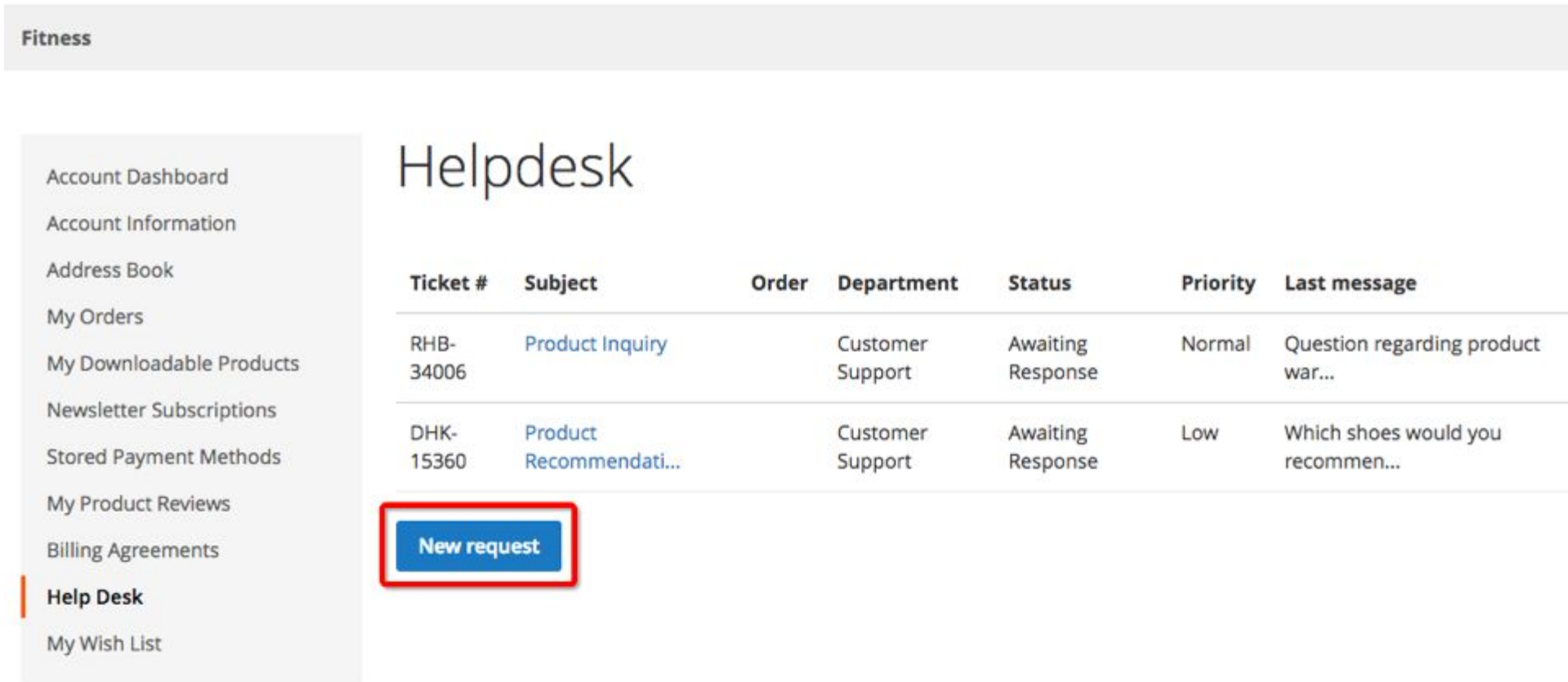


Image 18. Create new ticket via the New Request button

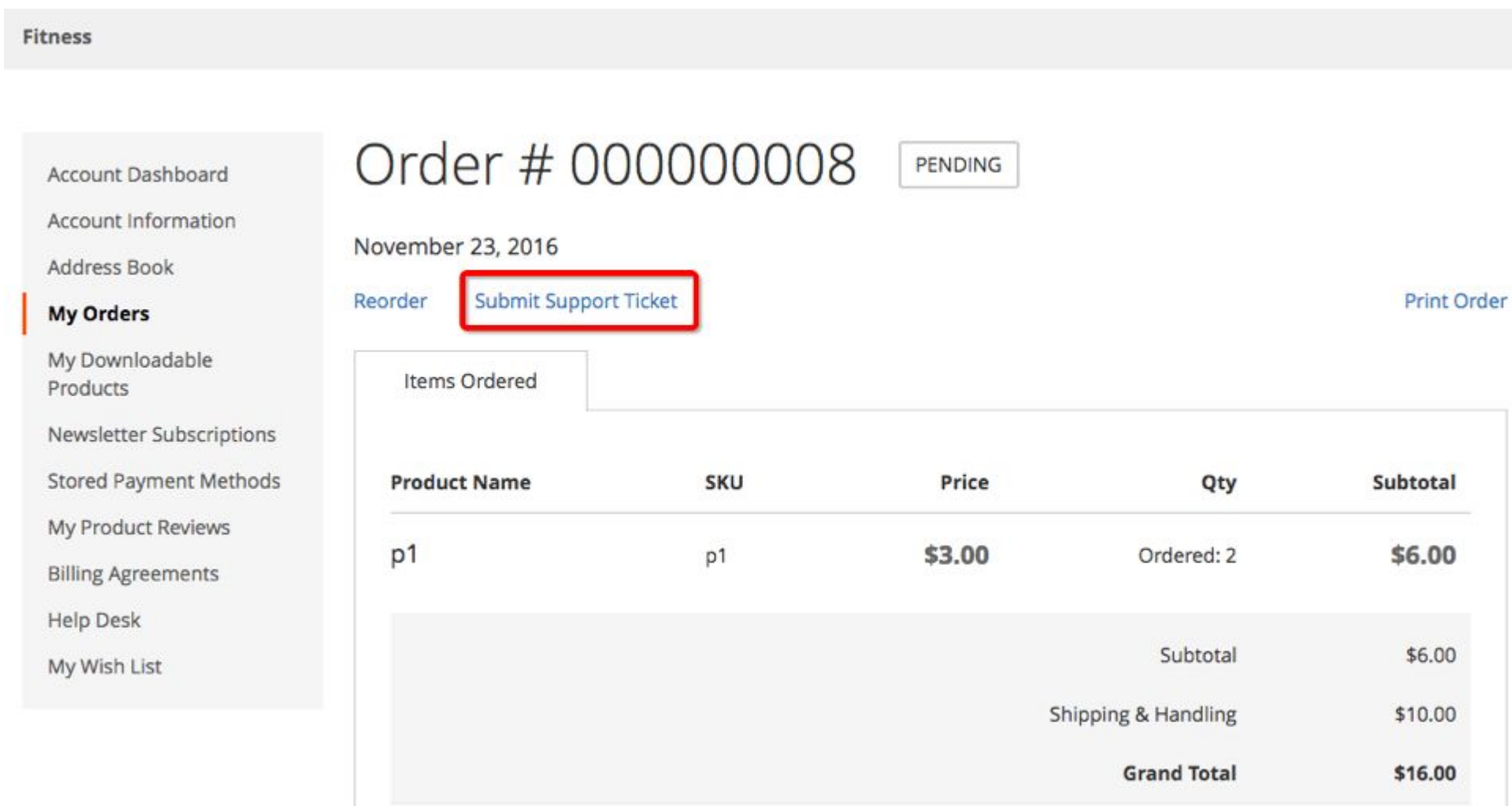


Image 19. Create new ticket via the Submit Support Ticket in the My Orders menu

Both ways will direct the customers to the **Helpdesk Submit Ticket** page. To create a new ticket, customer must fill out the following fields:

The screenshot shows the 'Helpdesk Submit Ticket' form. On the left is a navigation menu with 'Help Desk' highlighted. The form fields are: 'Subject' (text input with 'Inquiry for Product Exchange'), 'Order' (dropdown with '000000008'), 'Priority' (dropdown with 'Normal'), and 'Department' (dropdown with 'General'). Below these is a 'Message' text area containing 'Can I exchange this product for another one?'. At the bottom, there is a file upload section with 'Choose Files' and 'No file chosen' buttons, and a blue 'Submit' button.

Image 20. Help Desk Submit Ticket form

Once done, click on the **Submit** button.

System will show the message "Ticket has been submitted successfully." once ticket has been created.

### 3.4 Managing Tickets via Mobile

Customers can view, modify, and create tickets via mobile. Click on the subject name to view and edit existing ticket.

Account Dashboard

## [DHK-15360] Product Recommendation

Status: **Awaiting Response**

Priority: **Low**

Rate this ticket: ★★★★★

Post a message:

Choose Files No file chosen

Submit

Alex Mayer

a day ago

Hi Ana,

We would like to give you a call to get a further understanding of your running shoes needs. Kindly send us your contact number and we will get in touch with you.

Image 21. Ticket View Mobile