

# HelpRealm Documentation

**Codename:** dnyHelpRealm

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Welcome to the documentation of HelpRealm – the lightweight support ticket system as a SaaS solution. This guide shows you how to use the app. If you have any questions or need help please don't hesitate to contact me.

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## Registration

Just go to the official homepage of HelpRealm and read the terms and conditions carefully. If you agree with them then click on the signup button. A window should appear:

A screenshot of the HelpRealm website's registration form. The form is titled "Sign up" and is centered on a dark background. It contains several input fields: "Your company name", "Your full name", "Your E-Mail address", "Password", "Confirm password", and a captcha field with the text "Captcha: 10 + 5 = ?". Below the captcha field, there is a small line of text: "By registering to our service you agree automatically with our end-user license agreement." At the bottom of the form is a green "Sign up" button. The top of the page shows a navigation bar with links: "HelpRealm", "About", "FAQ", "Documentation", "Imprint", and "Terms and Conditions". In the top right corner, there are "Sign up" and "Login" buttons.

Enter your company name, your full name, your e-mail address, your password with confirmation and the captcha. Your account will then be created. After account creation you need to confirm your account with the specified e-mail address. After successfully confirming your account you will then be able to login into your workspace.

Go to system settings. You will find your workspace link there. This is the link you have to provide to your customers in order for them to create support requests.

## Customer view

The customer view is what your clients see. They can either see a form where to create or open tickets with and also a personal page showing ticket information and conversation. Also they can view the FAQ.



**Create new ticket**

Welcome to our support service. Please fill out the form in order to contact us. After submitting the form you will need to validate your e-mail address. A support agent will then process your request. You will get notification e-mails when an agent has replied to your ticket. Note: If you don't know which type of ticket you need to choose then leave it as default.

**Captcha: 10 + 0 = ?**

Note: You can attach files afterwards

ⓘ [Open ticket](#) | [Login as agent](#)

Test Ticket

45 seconds ago

Permalink: <http://localhost:8000/aa14bb29b2c7af38176fc4896e9e471b/ticket/show/4d713719c0e6a0344ee6d05c585432e4>

Open

This is just a test

Select a file

Upload

Enter your text...

Captcha: 0 + 0 = ?

0 + 0 = ?

Post4096

 Freya Witch  
1 minute ago

Nice work!

Edit

 Jon Doe  
10 minutes ago

Hello dear

Before being able to manage a ticket by the owner customer, the customer needs to confirm their e-mail address after the ticket has been created. On successfull confirmation the customer can then post comments and upload files. The ticket will initially be set to „Awaiting confirmation“ and after successfull confirmation it will be set to „Open“.

The customer needs to held the link to the support conversation private. There they can communicate with the support staff and also exchange files. Whenever a customer replies to a ticket it will be set to status „open“. When a support agent replies it will set to „waiting“ which indicates that the staff is waiting for the customer to reply. When a ticket is closed by staff the customer can no longer reply or upload files to the ticket.

Customers will recieve e-mails for the associated events.

A customer can click „Open ticket“ and enter a ticket hash in order to view the ticket detail form. The ticket hash is the same as in the private ticket link.

The FAQ overlay looks as follows:

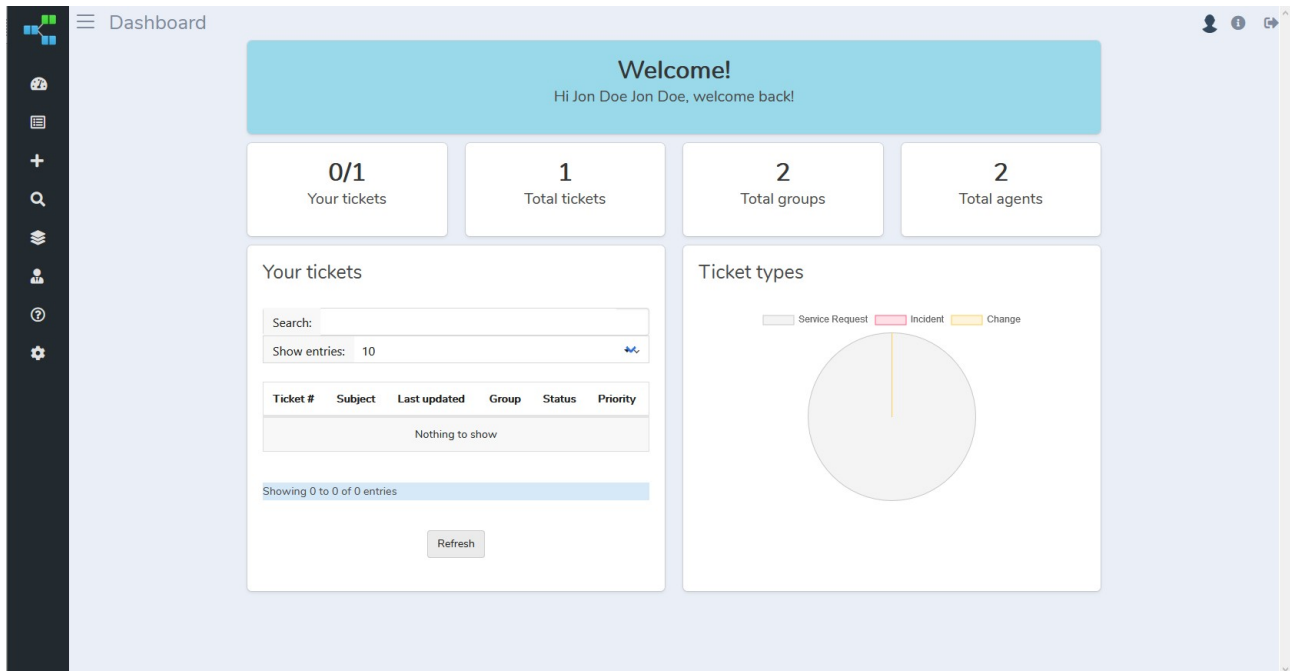
x



Welcome to our support service  
 validate your e-mail address  
 agent has replied to your ticket

# Dashboard

The dashboard shows you some general data. There you can view an overview of your tickets and general information about tickets.



On left side there a menu. It covers the following items:

- Dashboard: Opens the dashboard as seen above
- Ticket list: Opens a ticket list where you can see tickets of your groups and tickets that are assigned to you
- Ticket creation: Here you can create tickets for customers
- Ticket search: Shows a form where you can search for tickets
- Groups: Manage ticket groups here. Only available for superadmins
- Agents: Manage your agents here. Only available for superadmins
- System: Manage system settings here. Only available for superadmins

## Tickets

As an agent you can view your tickets and the tickets in the group you are in. Here you can see basic details of the tickets. Click a ticket in order to open it.

View tickets

Your tickets

Search:

Show entries: 10

Ticket #	Subject	Last updated	Group	Status	Priority
#2	<a href="#">Test Ticket</a>	22 seconds ago	1st level group	<button>Open</button>	Low

Showing 1 to 1 of 1 entries

Prev

1

Next

Refresh

Tickets of your groups

Search:

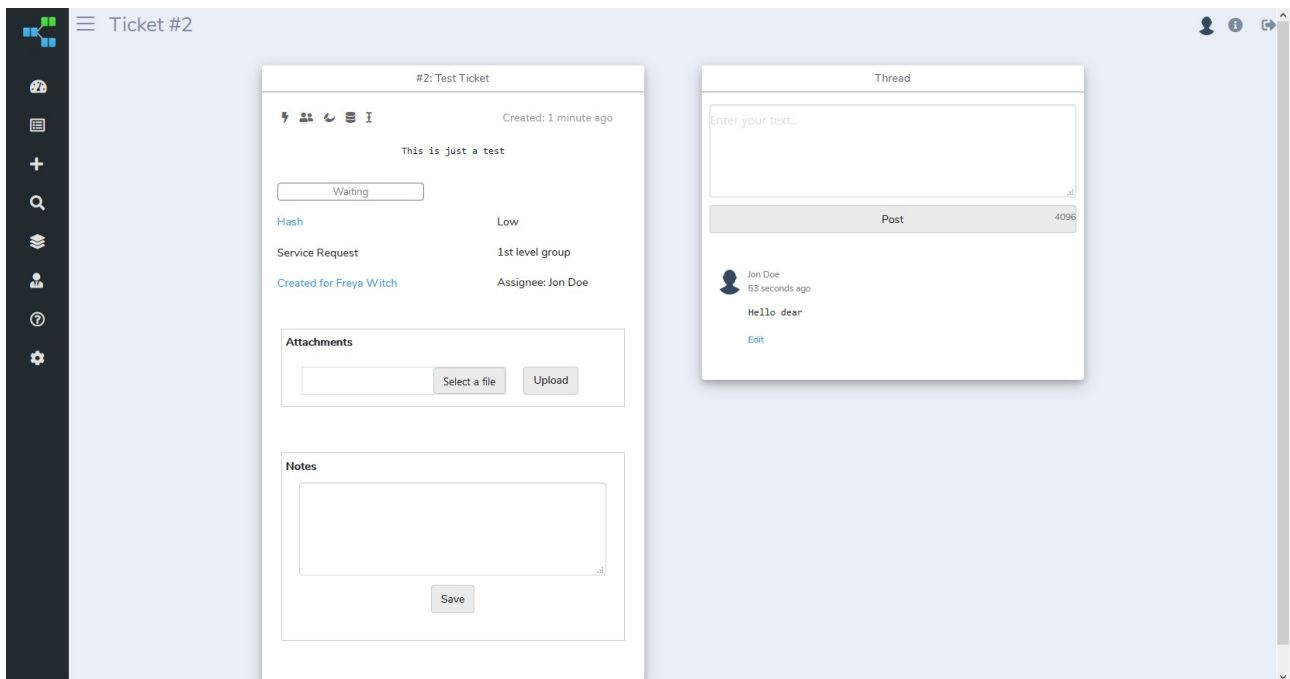
Show entries: 10

Ticket #	Subject	Last updated	Group	Status	Priority
#2	<a href="#">Test Ticket</a>	22 seconds ago	1st level group	<button>Open</button>	Low

Showing 1 to 1 of 1 entries







Now you can add comments, manage the ticket data and add attachments.  
The following ticket options exist (left to right):



- Assign ticket to agent. A window will open where you can select an agent
- Assign ticket to group. A window will open where you can select a group
- Set ticket status. Here you can set the status open, waiting and closed
- Set ticket priority. Here you can set it to low, medium or high
- Set ticket type. Here you can change it to service request, incident or change

Click the „Hash“ link in order to view the ticket hash. You can share it with the customer.

You can create tickets for customers. Therefore click on the „+“ icon:

Create new ticket

Create new ticket

**Name**

Name

**E-Mail**

E-Mail

**Subject**

Subject

**Text**

Text

**Type**

Service Request

**Priority**

Low

**Group**

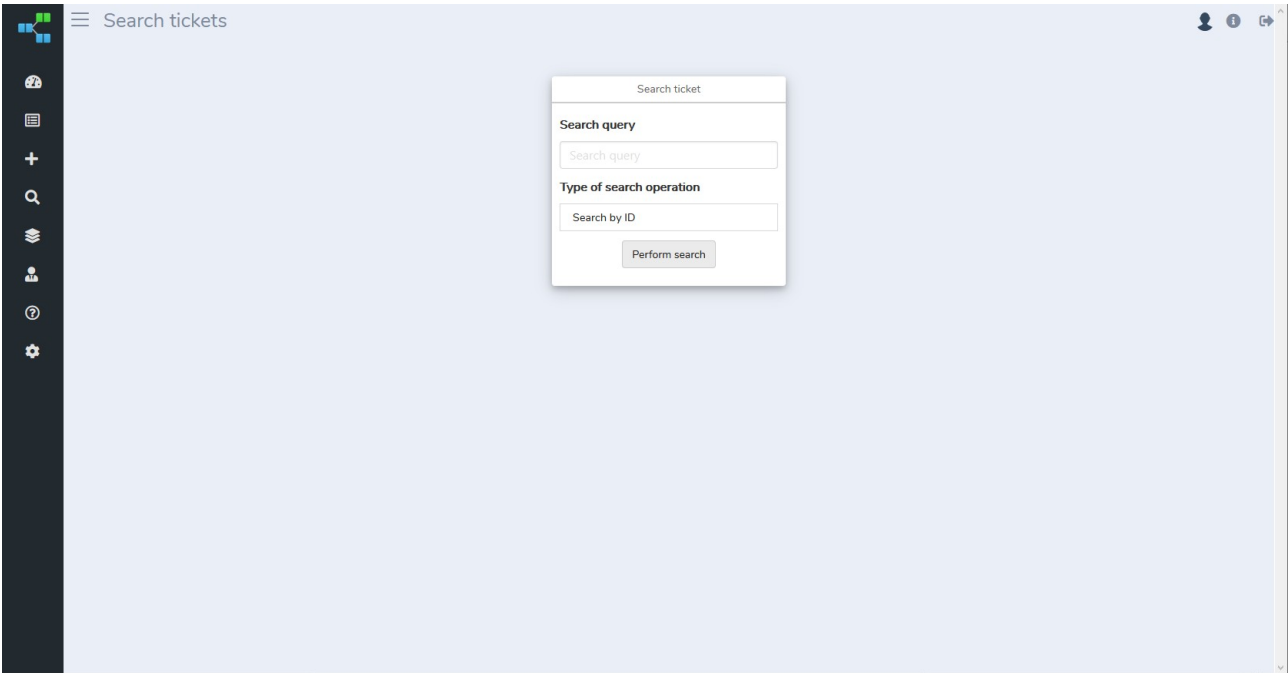
1st level group

**Assignee**

-










All fields are mandatory. You don't need to specify an agent if you want to just have it in a group and let the agents decide who takes it.

You also can search for tickets by clicking the lense button. Tickets can be found by ID, hash, subject and description.



# Groups

Here you can view a list of all created groups. Click a group in order to edit the group details. Click „Create“ in order to create a new group.



Groups

Groups

Search:

Show entries: 10

ID	Name	Description	Default
#2	1st level group	The primary group	true

Showing 1 to 1 of 1 entries

Previous

1

Next

Refresh

Create

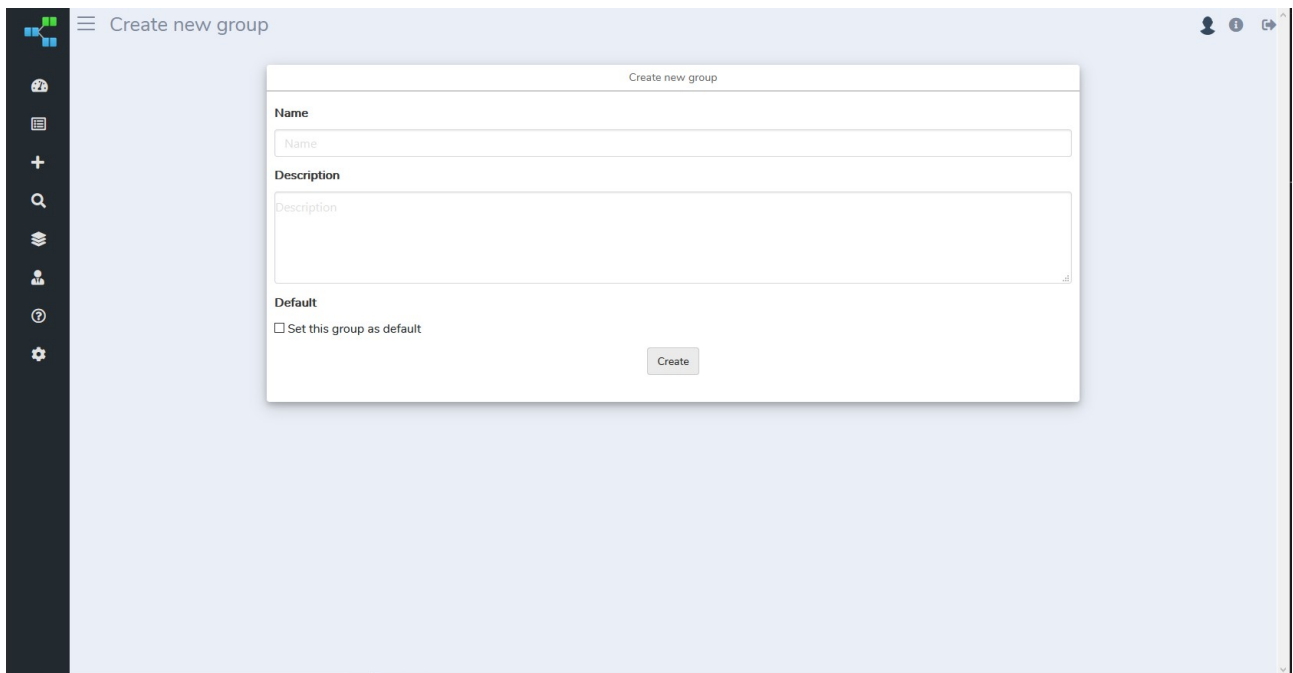
On group details view you can edit the group and also assign and remove agents

- Click on the „Add to group“ button to add an agent. A window with a list of agents will open
- Click the „Remove“ link in order to remove an agent from the group

The screenshot displays the 'View group' interface. On the left, a sidebar contains navigation icons. The main area is titled 'View group' and contains two panels. The left panel, titled 'View group', has fields for 'Name' (containing '1st level group') and 'Description' (containing 'The primary group'). Below these is a 'Default' section with a checked checkbox 'Set this group as default' and 'Save' and 'Delete' buttons. The right panel, titled 'Agents', has a search bar, a 'Show entries: 10' dropdown, and a table of agents. The table has columns 'ID', 'Surname Lastname', and 'Remove'. It shows one agent with ID '#2' and Surname 'Jon Doe'. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries' with 'Prev', '1', and 'Next' buttons. At the bottom of the panel are 'Refresh' and 'Add to group' buttons.

ID	Surname Lastname	Remove
#2	Jon Doe	<a href="#">Remove</a>

Back to the group list view, you can click „Create“ button to open a form where you can create a new group.



The screenshot shows a web application interface with a dark sidebar on the left containing various icons. The main area has a light blue background with a header bar that says "Create new group". In the center, a white dialog box titled "Create new group" is open. It contains three sections: "Name" with a text input field, "Description" with a larger text area, and "Default" with a checkbox labeled "Set this group as default". A "Create" button is located at the bottom right of the dialog box.

Create new group

**Name**

Name

**Description**

Description

**Default**

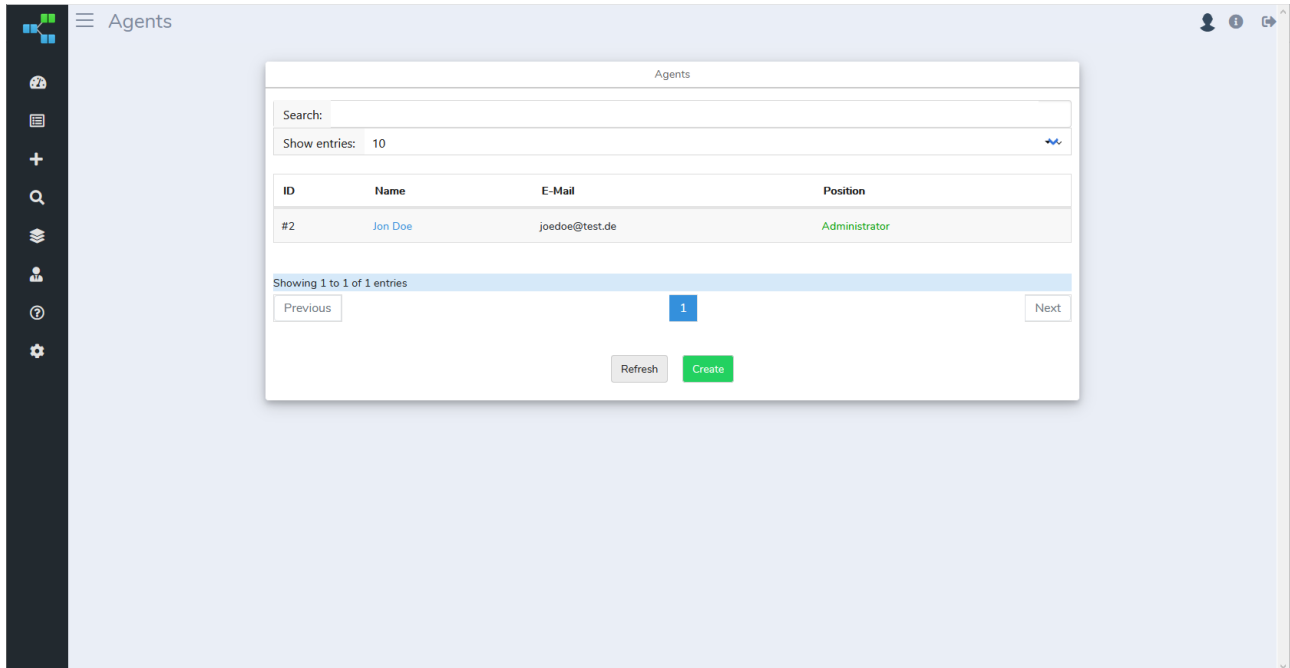
☐ Set this group as default

Create

Note: Default group means that newly created tickets will be automatically inserted into the group. Only one group can be set as default. Setting multiple groups to default will be ignored.

## Agents

Here you can view all your agents. You can click an agent in order to edit their details and assign groups. Also you can add new agents and delete existing ones. Be careful when granting superadmin rights. You should only give that permission to team members you are in that position of your company.



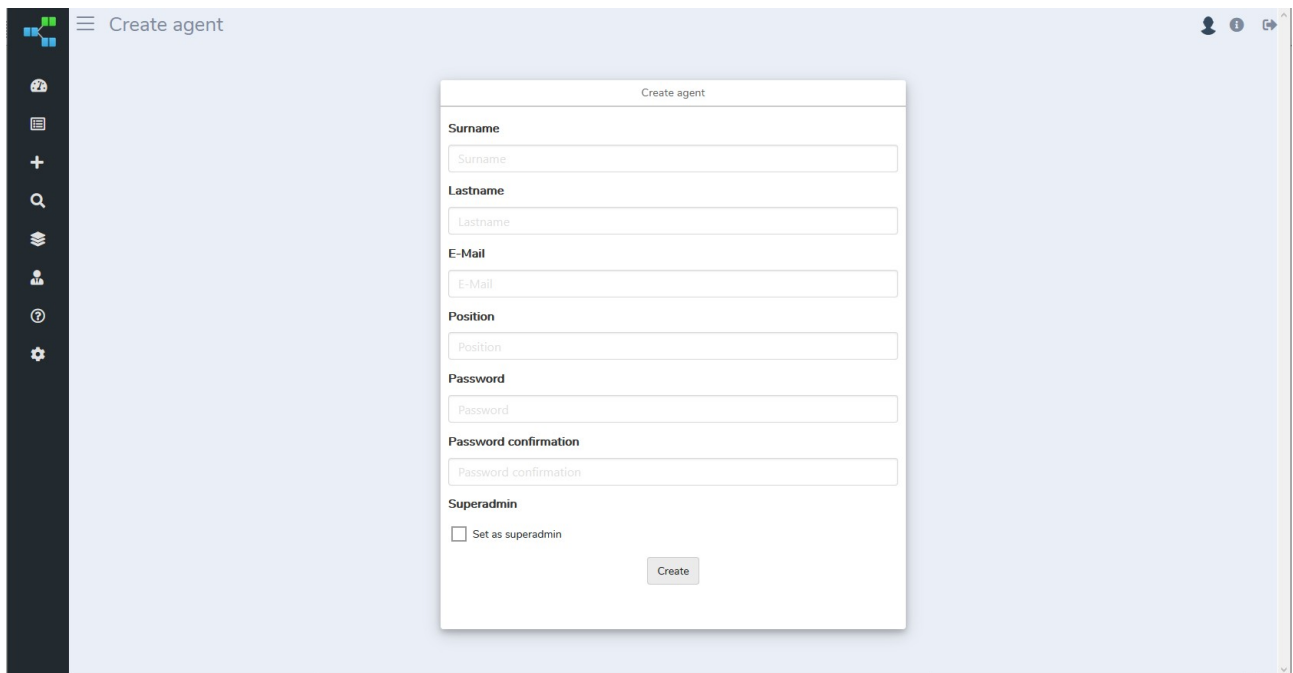
The screenshot displays a web application interface for managing agents. On the left is a dark sidebar with icons for home, search, and other functions. The main content area is titled "Agents" and contains a search bar, a "Show entries: 10" dropdown, and a table of agents. The table has columns for ID, Name, E-Mail, and Position. One agent is listed: ID #2, Name Jon Doe, E-Mail joedoe@test.de, and Position Administrator. Below the table is a pagination bar showing "Showing 1 to 1 of 1 entries" with "Previous", "1", and "Next" buttons. At the bottom are "Refresh" and "Create" buttons.

ID	Name	E-Mail	Position
#2	Jon Doe	joedoe@test.de	Administrator

Showing 1 to 1 of 1 entries

Previous 1 Next

Refresh Create



The screenshot shows a web application interface with a dark sidebar on the left containing various icons. The main area has a light blue background with a 'Create agent' form centered. The form is titled 'Create agent' and contains several input fields and a checkbox. The fields are labeled: Surname, Lastname, E-Mail, Position, Password, Password confirmation, and Superadmin. The Superadmin section includes a checkbox labeled 'Set as superadmin' and a 'Create' button at the bottom right of the form.

Create agent

**Surname**  
Surname

**Lastname**  
Lastname

**E-Mail**  
E-Mail

**Position**  
Position

**Password**  
Password

**Password confirmation**  
Password confirmation

**Superadmin**  
☐ Set as superadmin

Create

If an agent is currently not active you can disable the active flag. Non-active agents will not be able to login and can't be assigned to tickets. If an agent returns to work then you can set the agent to active again.



Groups of agent

Search:

Show entries: 10

ID	Name	Remove
#2	1st level group	<a href="#">Remove</a>

Showing 1 to 1 of 1 entries

Prev

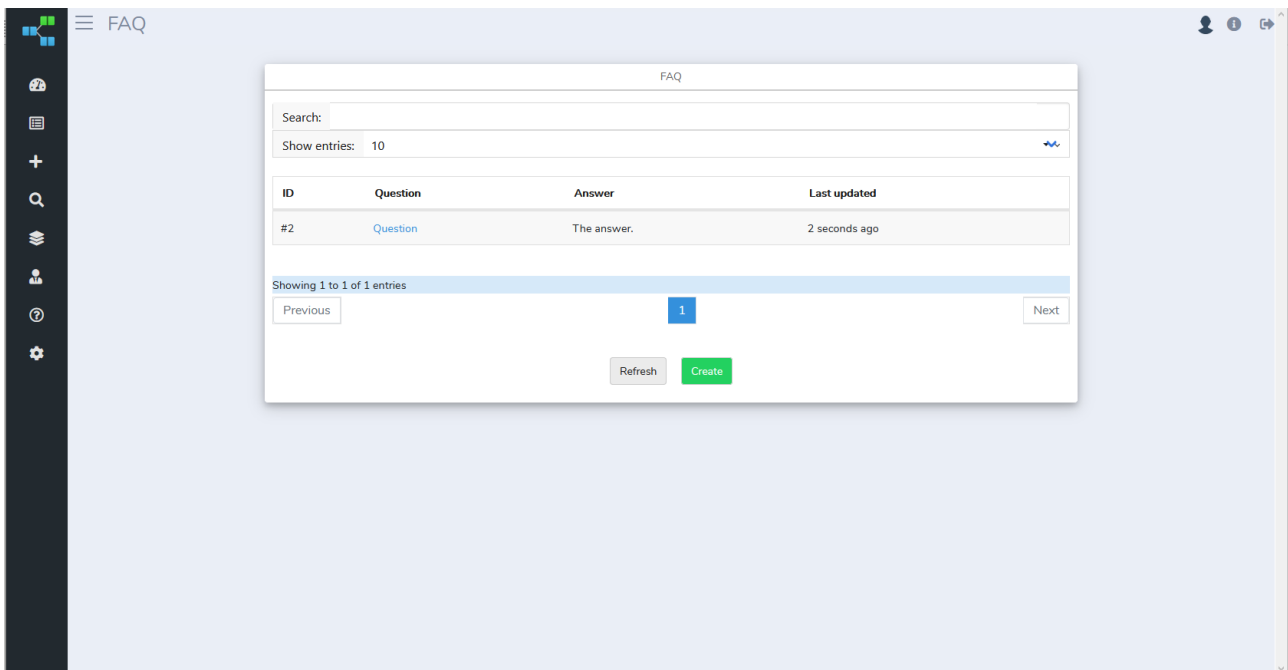
1

Next

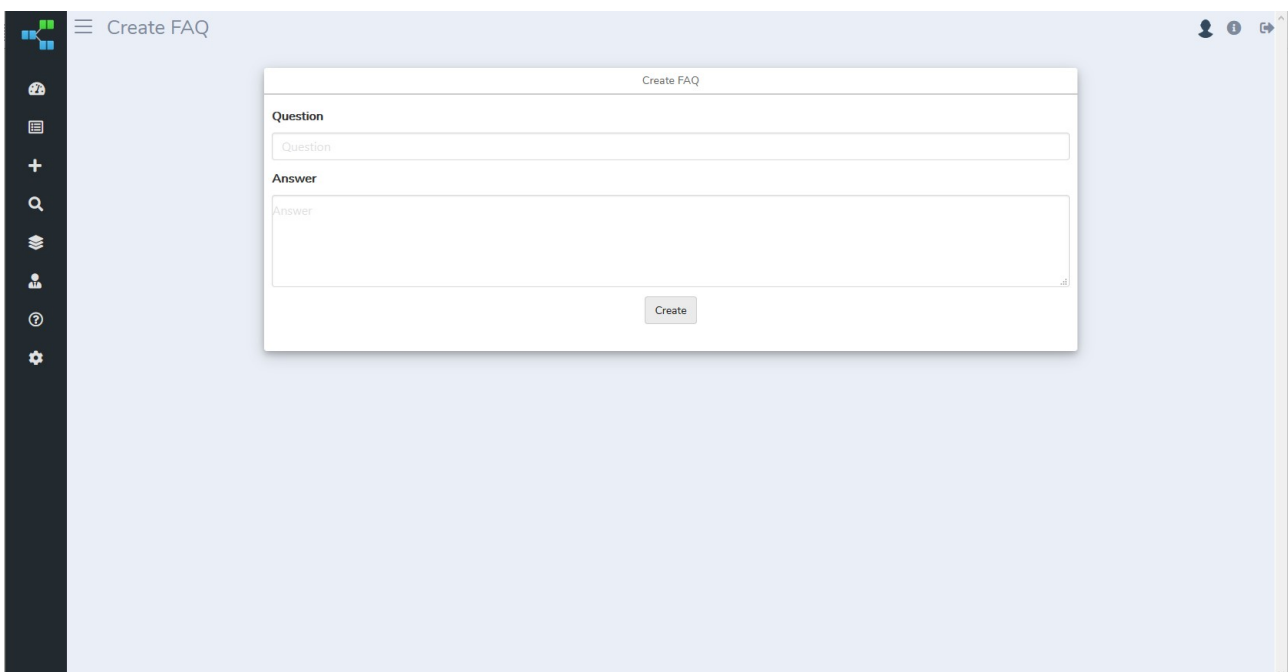
Add to group

## FAQ

You can manage frequently asked questions here. FAQs can be used to provide answers to common questions so a customer doesn't need to create a ticket for any simple problem. Click the question mark item to view the list of FAQs.



Click the create button to create a new FAQ.



In the FAQ list you can click on an item in order to edit it.

Edit FAQ

Question

Question

Answer

The answer.

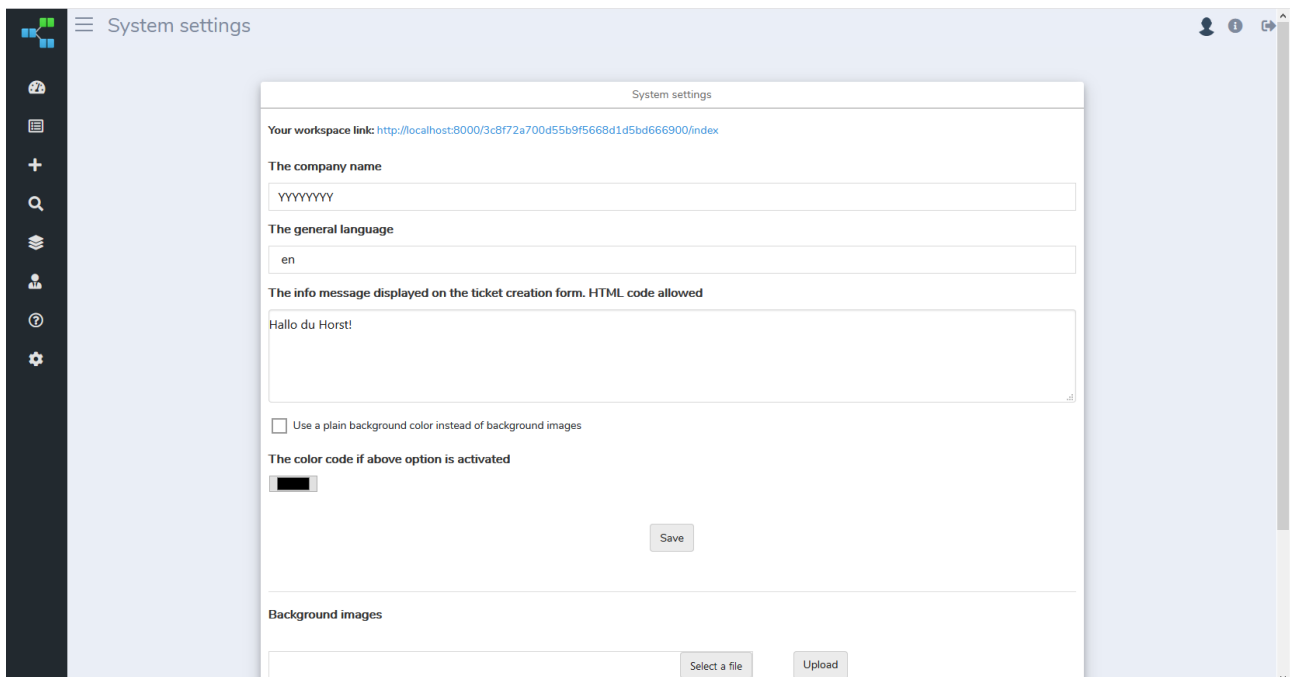
Save

Delete

## System settings

Here you can manage system settings. You can set the company name, the global language, debug mode and background mode. Global language is overridden by personal language that can be set by agents of their own profile (see settings section). Debug mode is only for testing. This is useful if you encounter a 500 server error during usage. Enabling debug mode will then result in outputting detailed error information which can then be sent to me.

Regarding the background mode you can specify whether background images or a plain background color shall be used in the customer views. And also you can upload new background images or delete existing ones.



The screenshot shows a web application interface for 'System settings'. On the left is a dark sidebar with icons for home, list, add, search, layers, user, help, and settings. The main area has a light blue header with a hamburger menu and the text 'System settings', and a user profile icon. A white settings modal is centered, titled 'System settings'. It contains the following fields and controls:

- 'Your workspace link: <http://localhost:8000/3c8f72a700d55b9f5668d1d5bd666900/index>'
- 'The company name' text input with 'YYYYYYYY' as placeholder text.
- 'The general language' text input with 'en' as the value.
- 'The info message displayed on the ticket creation form. HTML code allowed' text area with 'Hallo du Horst!' as the content.
- A checkbox labeled 'Use a plain background color instead of background images' which is currently unchecked.
- 'The color code if above option is activated' color picker showing a black color.
- A 'Save' button.
- 'Background images' section with a text input, a 'Select a file' button, and an 'Upload' button.

## Profile Settings

You can edit your own settings in the settings menu. There you can edit your personal data, change your password, upload an avatar and change your language.

The screenshot displays a web application's 'Settings' page. On the left is a dark sidebar with icons for home, settings, add, search, layers, user, help, and a gear icon. The main content area has a light blue background and a 'Settings' header. It contains three white panels: 'Settings' with fields for Surname (Jon), Lastname (Doe), E-Mail address (joedoe@test.de), Password, and Password confirmation, with a 'Save' button; 'Avatar' with a file selection button and a 'Save' button; and 'Language' with a dropdown set to 'en' and a 'Save' button.

Settings

Surname

Jon

Lastname

Doe

E-Mail address

joedoe@test.de

Password

Password confirmation

Save

Avatar

Avatar

Select a file

Save

Language

Language

en

Save