

HelpRealm Documentation

Codename: dnyHelpRealm

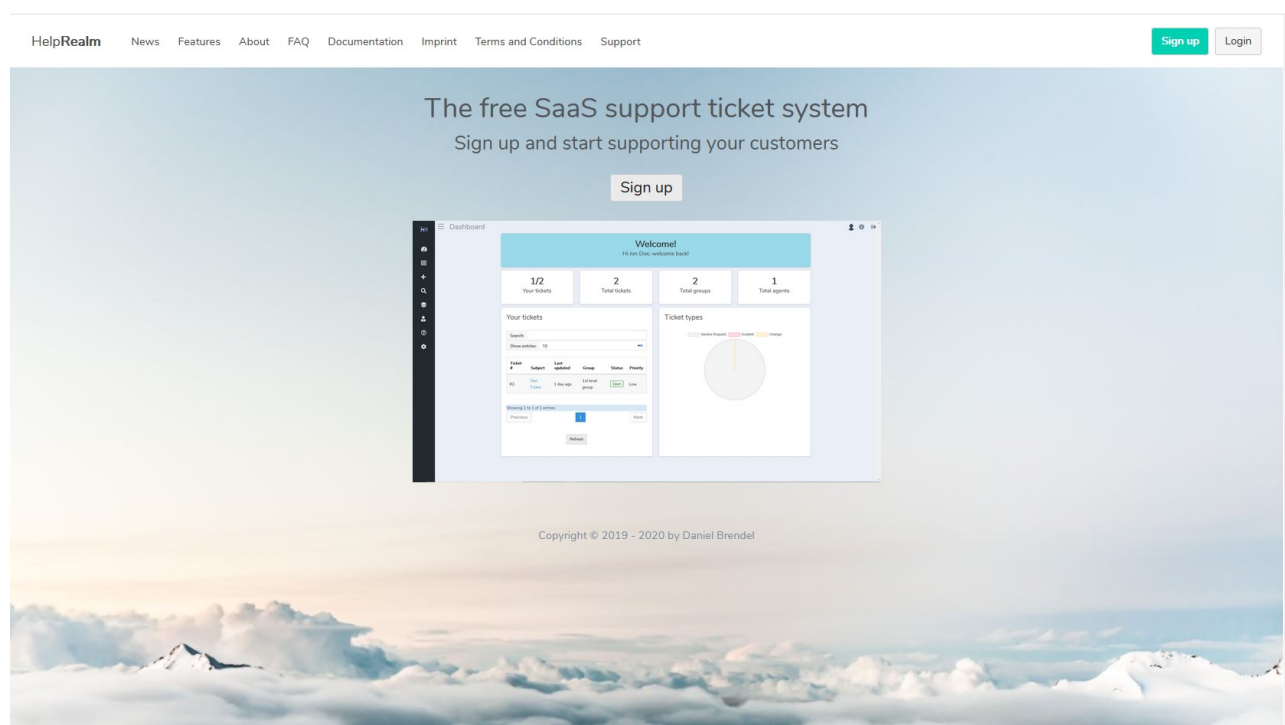
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Welcome to the documentation of HelpRealm – the free SaaS support ticket system. This guide shows you how to use the app. If you have any questions or need help please don't hesitate to contact me.

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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 displayed as a modal window. 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 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 background of the website is dark with a mountain landscape image.

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 = ?

Post 4096



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.

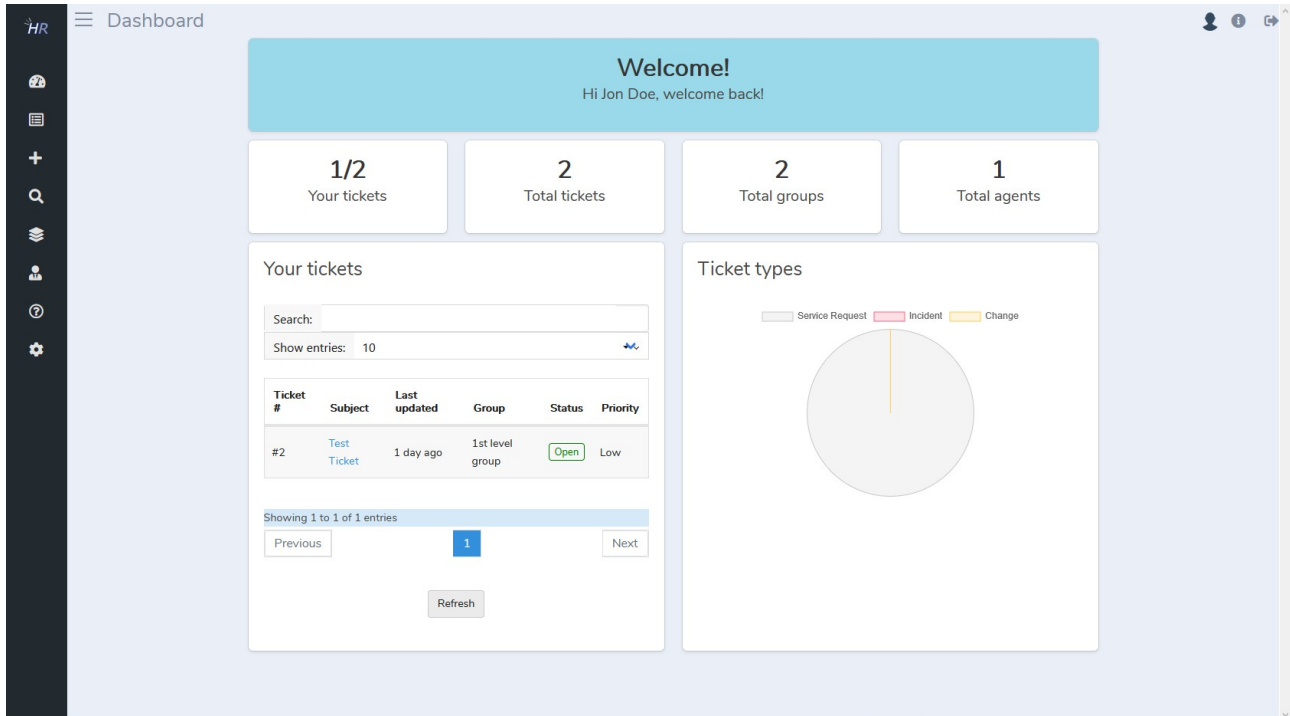
The FAQ overlay looks as follows:

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.

The screenshot shows the 'View tickets' interface. On the left is a dark sidebar with icons for HR, users, calendar, add, search, list, profile, help, and settings. The main area has a header 'View tickets' and a user profile icon. Below the header are two panels:

Your tickets

Search:
Show entries: 10

Ticket #	Subject	Last updated	Group	Status	Priority
#2	Test Ticket	1 day ago	1st level group	Open	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
#5	Another request	10 hours ago	1st level group	Awaiting confirmation	Low
#2	Test Ticket	1 day ago	1st level group	Open	Low

Showing 1 to 2 of 2 entries

Previous 1 Next

The screenshot shows the 'Ticket #2' detail view. On the left is the same dark sidebar. The main area has a header 'Ticket #2' and a user profile icon. Below the header are two panels:

#2: Test Ticket

Created: 1 day ago

This is just a test

Open

Hash: Low

Service Request: 1st level group

Created for [Freya Witch](#) Assignee: [Jon Doe](#)

Attachments

[Scientagram.png...](#) 804.034kb • priv

Select a file Upload

Notes

Save

Thread

Enter your text...

Post 4096

[Freya Witch](#) 1 day ago

Nice work!

[Jon Doe](#) 1 day ago

Hello dear

[Edit](#)

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 one of the ticket types you have defined

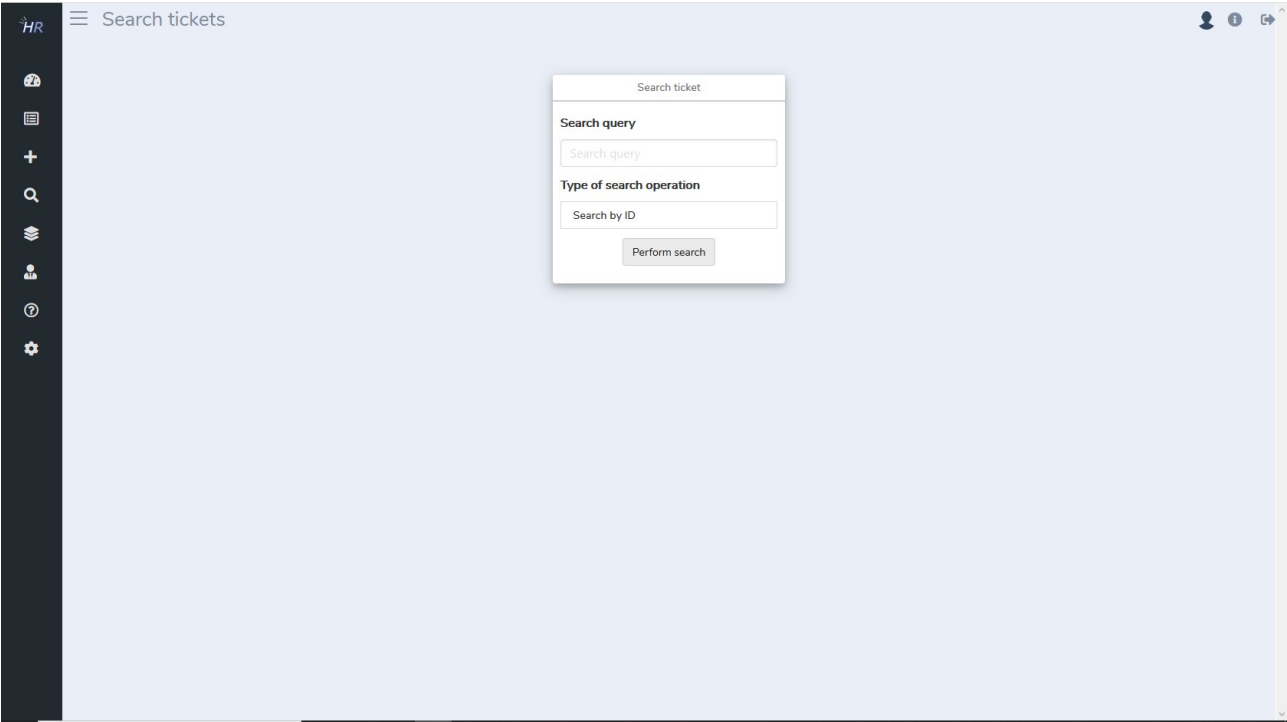
Click the „Hash“ link in order to view the ticket hash. You can share it with the customer.

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

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.

Note: It is also possible to reply to ticket notification emails in order to post to the ticket thread. A customer replying to a notification email will also lead to confirming their email address.

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.

The screenshot displays a web application interface for managing groups. On the left is a dark sidebar with icons for HR, a search icon, a plus sign, a magnifying glass, a list icon, a person icon, a question mark, and a gear. The main header shows a hamburger menu icon and the text 'Groups'. In the top right corner, there are icons for a user profile, a help icon, and a share icon. The central content area is a modal window titled 'Groups'. It features a search bar, a 'Show entries' dropdown set to 10, and a table with the following data:

ID	Name	Description	Default
#2	1st level group	The primary group	true
#4	2nd level group	dawfgawfgwaqgg	false

Below the table, it says 'Showing 1 to 2 of 2 entries'. There are 'Previous' and 'Next' buttons for pagination, with the number '1' highlighted in the center. At the bottom of the modal, there are 'Refresh' and 'Create' buttons.

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 shows the 'View group' interface. On the left is a sidebar with HR icons. The main area has two panels. The 'View group' panel on the left contains a 'Name' field with '1st level group', a 'Description' field with 'The primary group', and a 'Default' section with a checked checkbox 'Set this group as default'. At the bottom are 'Save' and 'Delete' buttons. The 'Agents' panel on the right has a search bar, a 'Show entries: 10' dropdown, and a table with columns 'ID', 'Surname Lastname', and 'Remove'. The table contains one entry: ID #2, Surname Lastname 'Jon Doe', and a 'Remove' link. 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.

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 the 'Create new group' form. It has a sidebar with HR icons. The main area contains a form with a 'Name' field (placeholder 'Name'), a 'Description' field (placeholder 'Description'), and a 'Default' section with an unchecked checkbox 'Set this group as default'. A 'Create' button is at the bottom right of the form.

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 shows the 'Agents' management interface. It features a sidebar with navigation icons and a main content area. The main area contains a search bar, a 'Show entries: 10' dropdown, and a table with columns: ID, Name, E-Mail, and Position. The table displays one entry: ID #2, Name Jon Doe, E-Mail joedoe@test.de, and Position Administrator. Below the table, it says 'Showing 1 to 1 of 1 entries' and includes 'Previous' and 'Next' buttons. At the bottom, there are 'Refresh' and 'Create' buttons.

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

The screenshot shows the 'Create agent' form. It includes input fields for Surname, Lastname, E-Mail, Position, Password, and Password confirmation. There is also a checkbox for 'Set as superadmin' and a 'Create' button at the bottom.

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.

HR

Show agent

View agent

Surname

Jon

Lastname

Doe

E-Mail

jon.doe@test.de

Position

Administrator

Active

☒ Set this agent to active

Superadmin

☒ Set as superadmin

Password

Password confirmation

Save

Delete

Groups of agent

Search:

Show entries:

10

ID	Name	Remove
#4	2nd level group	Remove

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

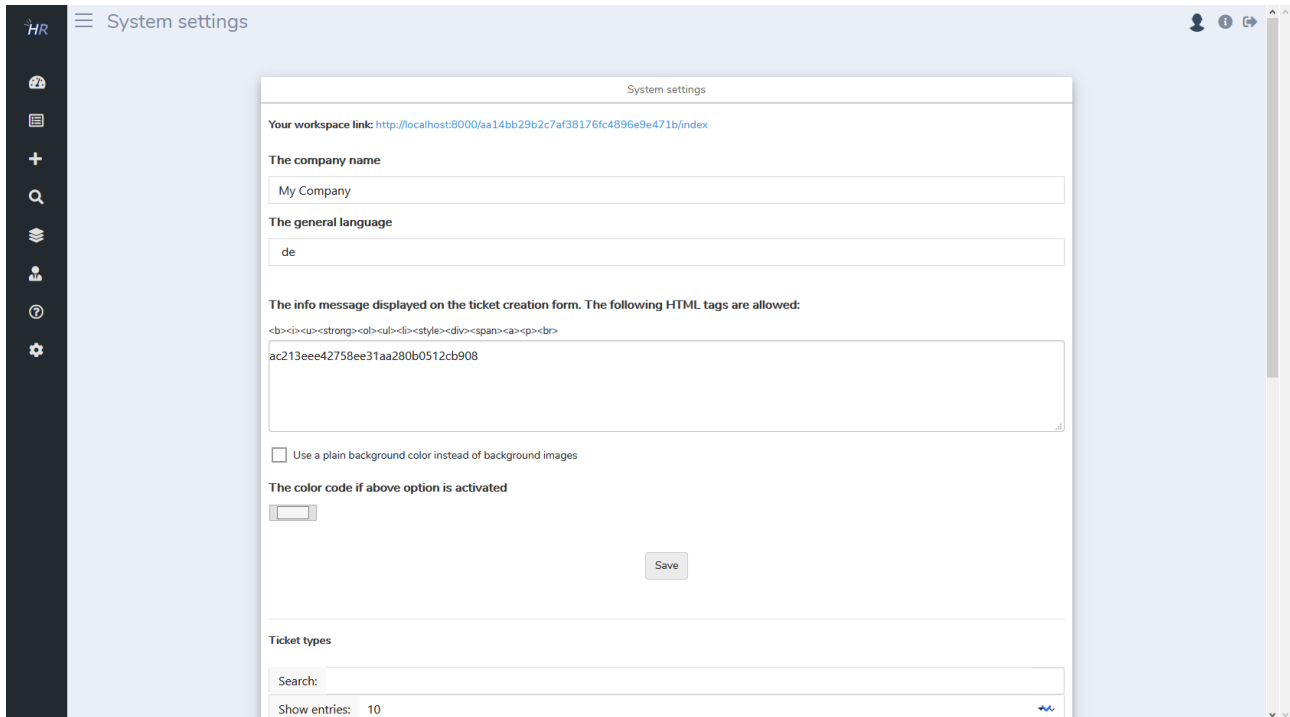
Answer

The answer.

Save Delete

System settings

Here you can manage system settings. You can set the company name, the global language (used for your customer views), the ticket form welcome message, ticket types and background mode. Global language is overridden by personal language that can be set by agents of their own profile (see settings section).

The screenshot shows a web application interface for 'System settings'. On the left is a dark sidebar with icons for HR, users, tickets, a plus sign, search, layers, a person, a question mark, and a gear. The main area has a light blue header with a hamburger menu and 'System settings'. Below this is a white modal window titled 'System settings'. Inside the modal, there's a 'Your workspace link' field with a URL. Then, 'The company name' field contains 'My Company'. 'The general language' field contains 'de'. Below that, a text area for 'The info message displayed on the ticket creation form' contains HTML code. A checkbox 'Use a plain background color instead of background images' is unchecked. Below it, 'The color code if above option is activated' has a small color picker. A 'Save' button is at the bottom of the modal. Below the modal, the 'Ticket types' section has a search bar and 'Show entries: 10'.

The ticket types should define the types of ticket that are suitable for your business. Commonly there are types such as Service Request, Incident and Change.

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.

There is also a danger zone where you can cancel your workspace. This will result in erasing all your workspace data and cannot be undone.

Ticket types

Search:

Show entries: 10



ID	Identifier	Created	Edit	Remove
#1	Service Request	10 minutes ago	Edit	Remove
#2	Incident	58 minutes ago	Edit	Remove



Showing 1 to 2 of 2 entries

Prev1Next

[Add ticket type](#)

Background images

bg1.jpg  bg2.jpg 

Select a file

Upload

Cancel Workspace

Captcha: 5 + 2 = ?

5 + 2 = ?

Cancel and delete my data

Profile Settings

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

The screenshot displays a web application interface for profile settings. On the left is a dark sidebar with icons for HR, a calendar, a plus sign, a magnifying glass, a stack of papers, a person icon, a question mark, and a gear. The main content area has a light blue background and a header with a hamburger menu icon, the text 'Settings', and user profile icons. Three white panels are shown:

- Settings Panel:** Contains fields for 'Surname' (Jon), 'Lastname' (Doe), and 'E-Mail address' (joedoe@test.de). It also has a checkbox for 'Send me an E-Mail when a ticket is routed into my groups' which is checked. Below these are 'Password' and 'Password confirmation' fields, followed by a 'Save' button.
- Avatar Panel:** Features an 'Avatar' label, a file selection input with a 'Select a file' button, and a 'Save' button.
- Language Panel:** Features a 'Language' label, a dropdown menu currently showing 'en', and a 'Save' button.