HelpRealm Documentation

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Version: 1.0

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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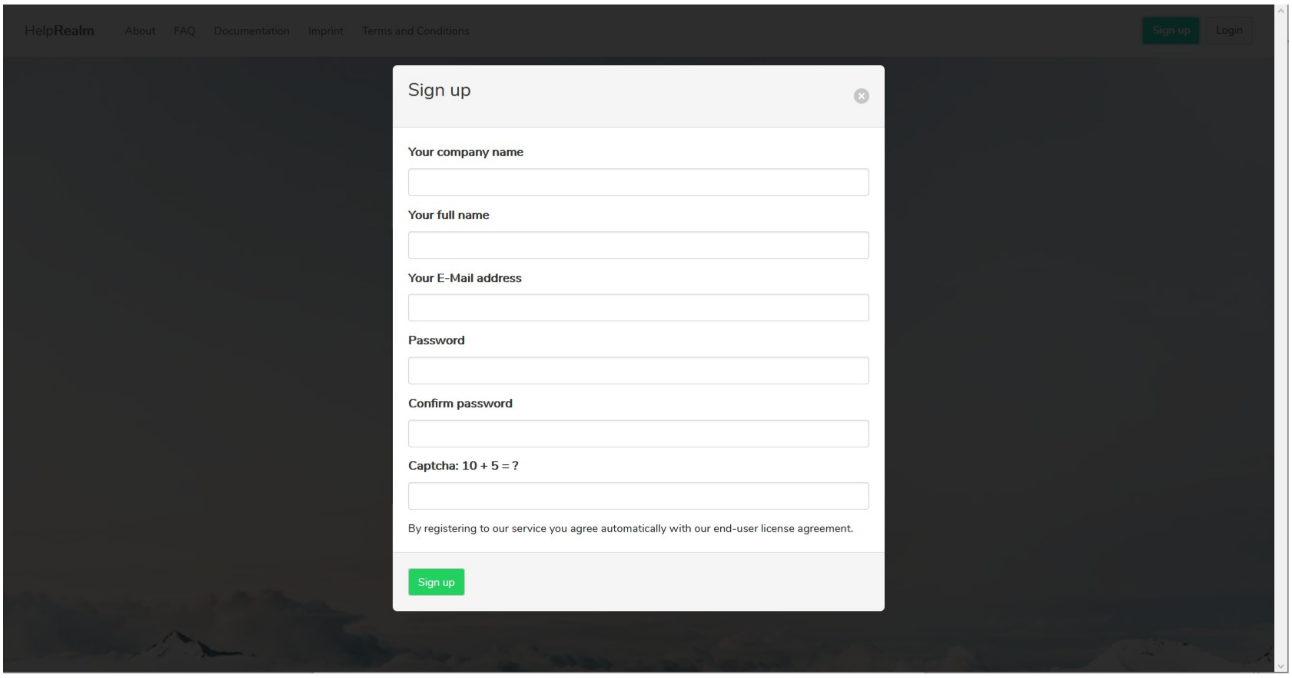
Registration

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:

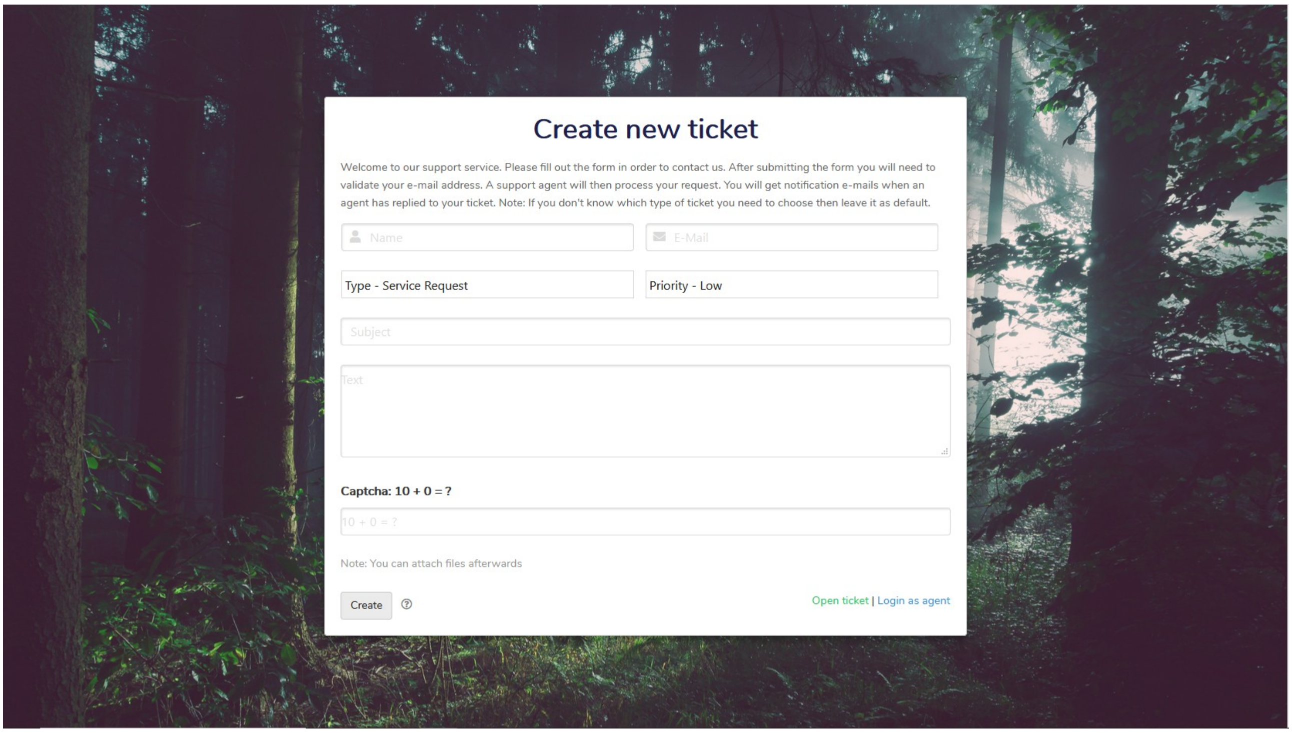


Enter your company name, your full name, your e-mail address, your password with confirmation and the captcha. Your account will then be created. After account creation you need to confirm your account with the specified e-mail address. After successfully confirming your account you will then be able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

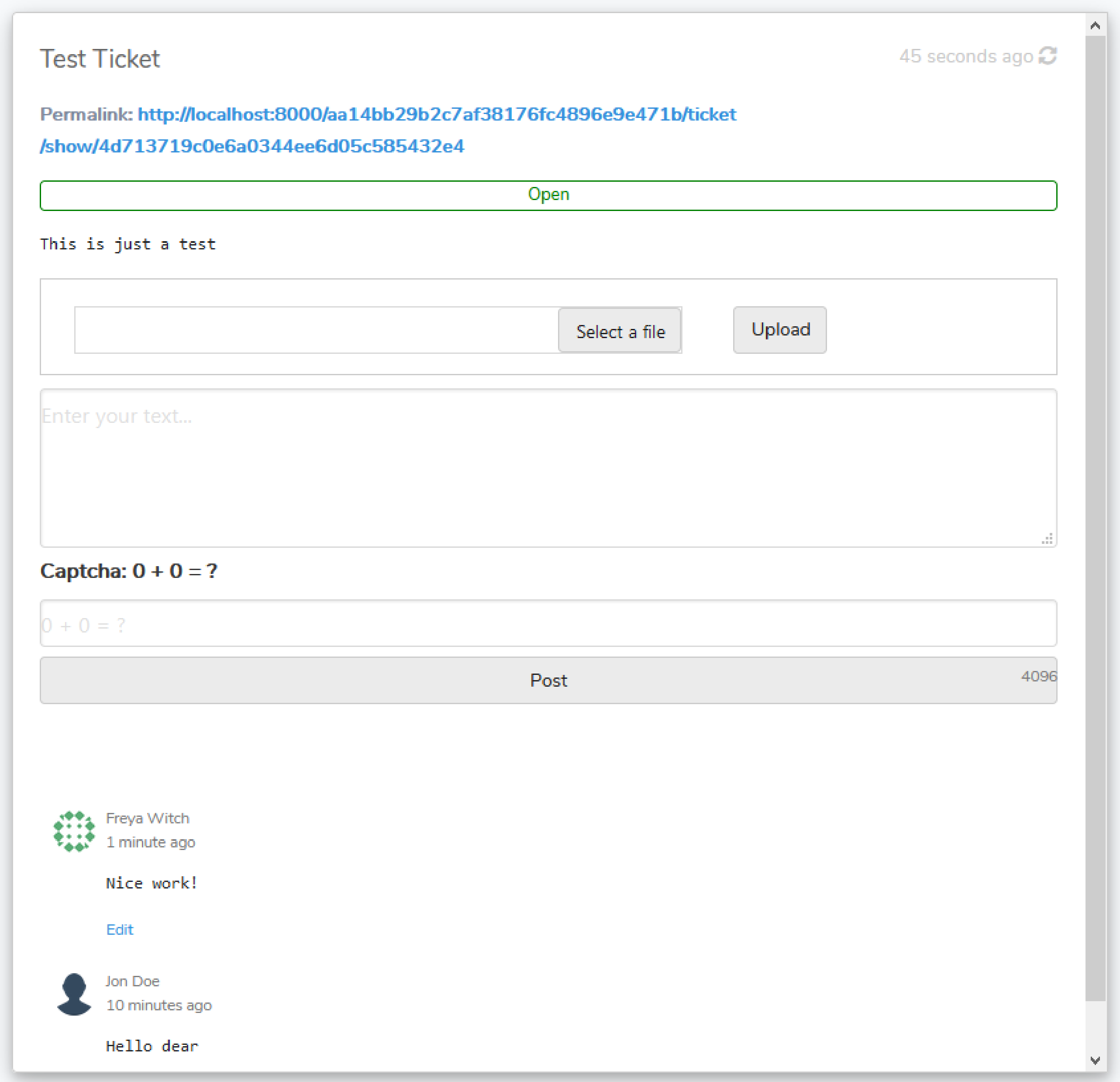
Go to system settings. You will find your workspace link there. This is the link you have to provide to your customers in order for them to create support requests.

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.



Communication between agents and customers can be processed by e-mail or a secret ticket thread form as seen below.



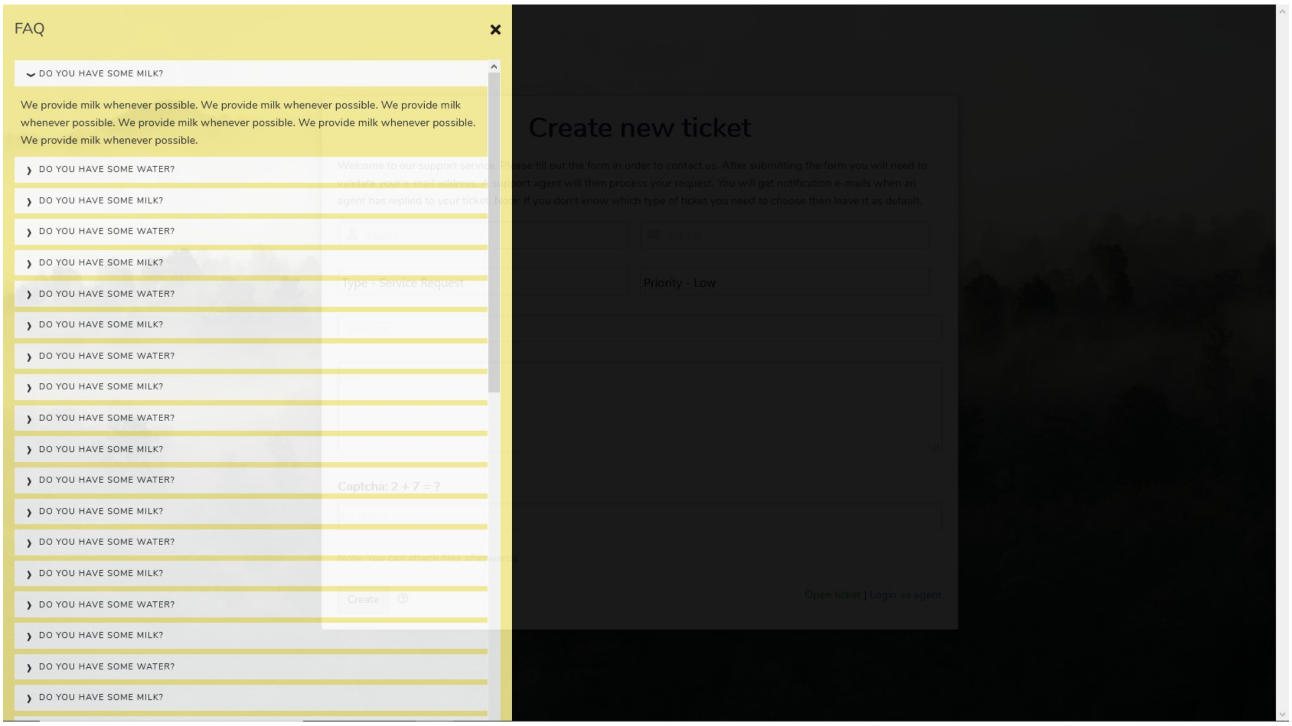
Before being able to manage a ticket by the owner customer, the customer might need to confirm their e-mail address after the ticket has been created (depends on the service settings). On successfull confirmation the customer can then post comments and upload files. The ticket will initially be set to „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:



FAQ
DO YOU HAVE SOME MILK?
We provide milk whenever possible. We provide milk whenever possible. We provide milk whenever possible. We provide milk whenever possible. We provide milk whenever possible. We provide milk whenever possible.
DO YOU HAVE SOME WATER?
DO YOU HAVE SOME MILK?
DO YOU HAVE SOME WATER?
DO YOU HAVE SOME MILK?
DO YOU HAVE SOME WATER?
DO YOU HAVE SOME MILK?
DO YOU HAVE SOME WATER?
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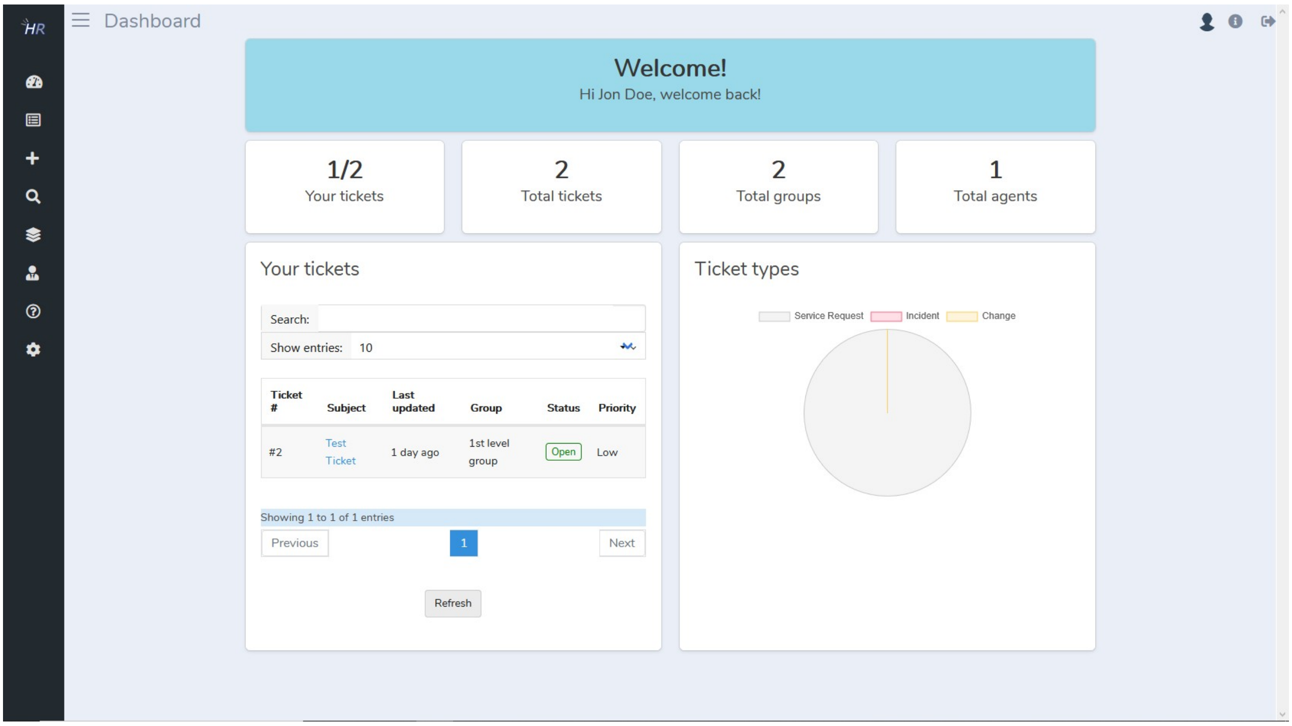
DO YOU HAVE SOME WATER?
DO YOU HAVE SOME MILK?
DO YOU HAVE SOME WATER?
DO YOU HAVE SOME MILK?
DO YOU HAVE SOME WATER?
DO YOU HAVE SOME MILK?
Create new ticket
Priority - Low

Dashboard

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

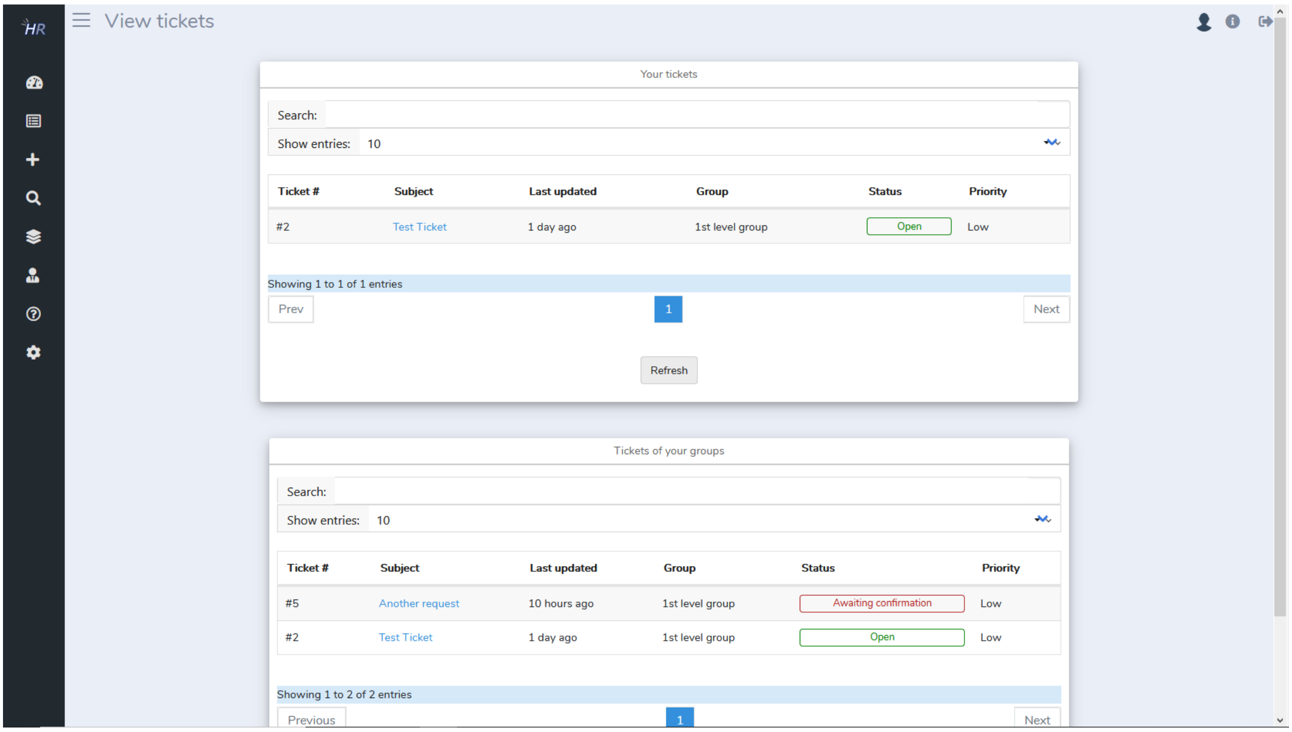


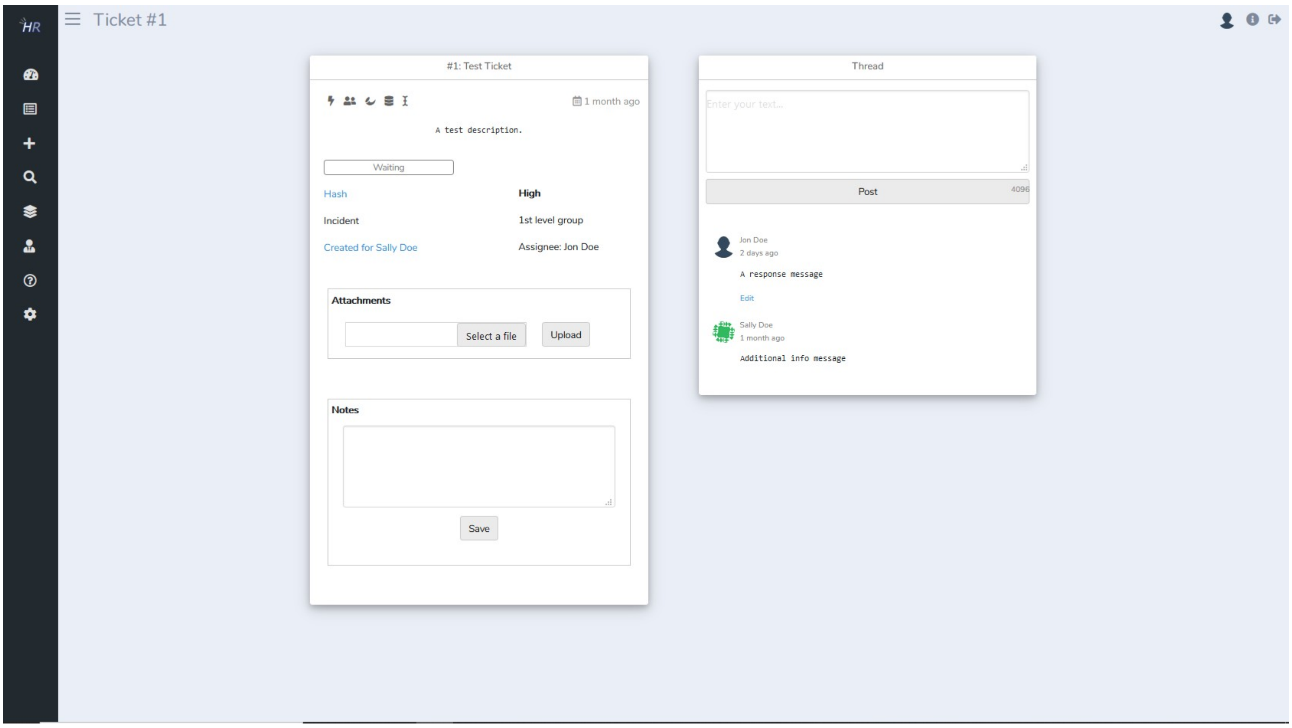
On left side there a menu. It covers the following items:

- 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

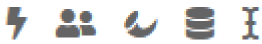
As an agent you can view your tickets and the tickets in the group you are in. Here you can see basic details of the tickets. Click a ticket in order to open it.





Now you can add comments, manage the ticket data and add attachments.

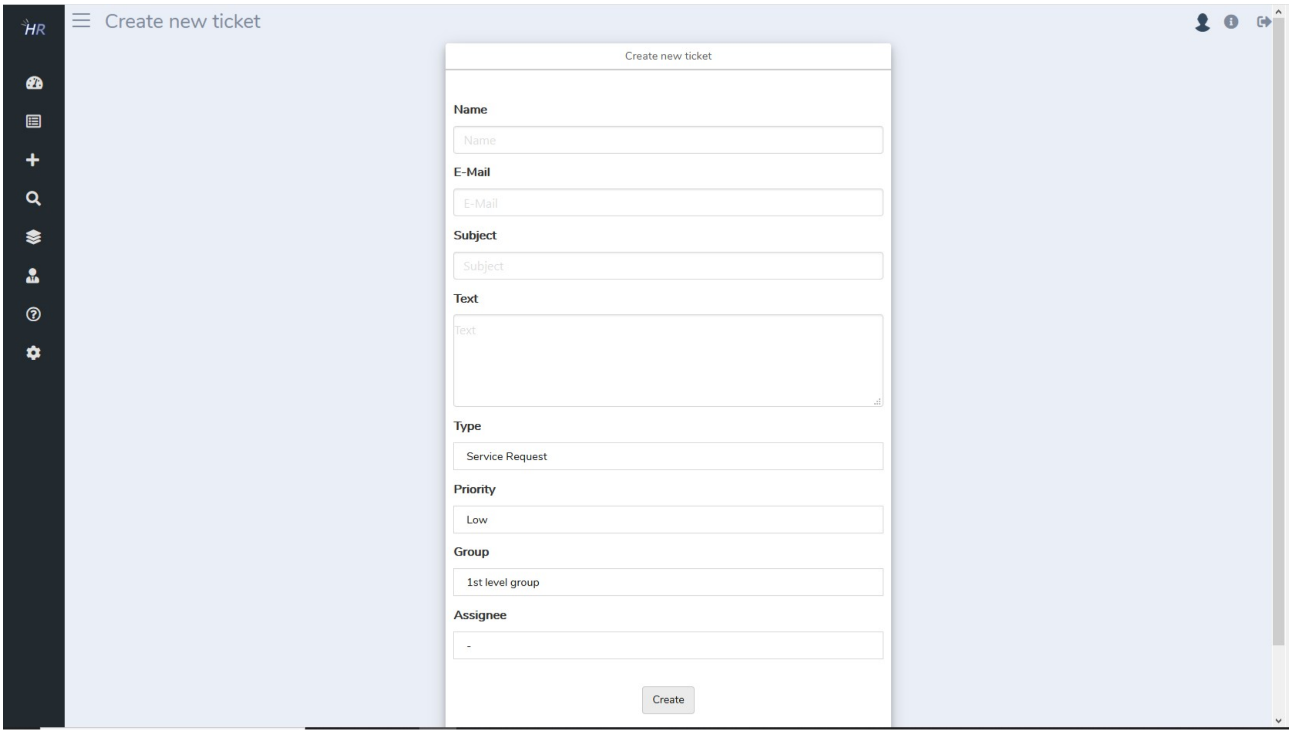
The following ticket options exist (left to right):



- 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.

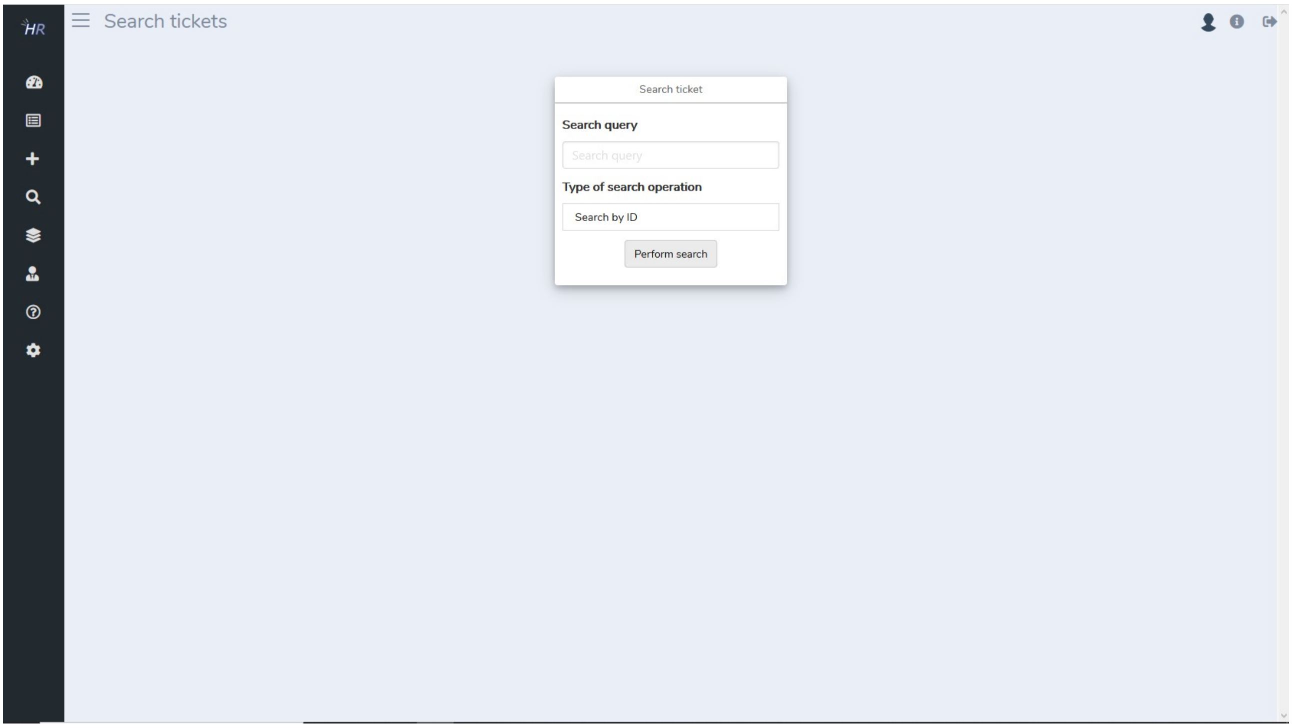
You can create tickets for customers. Therefore click on the „+“ icon:



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.

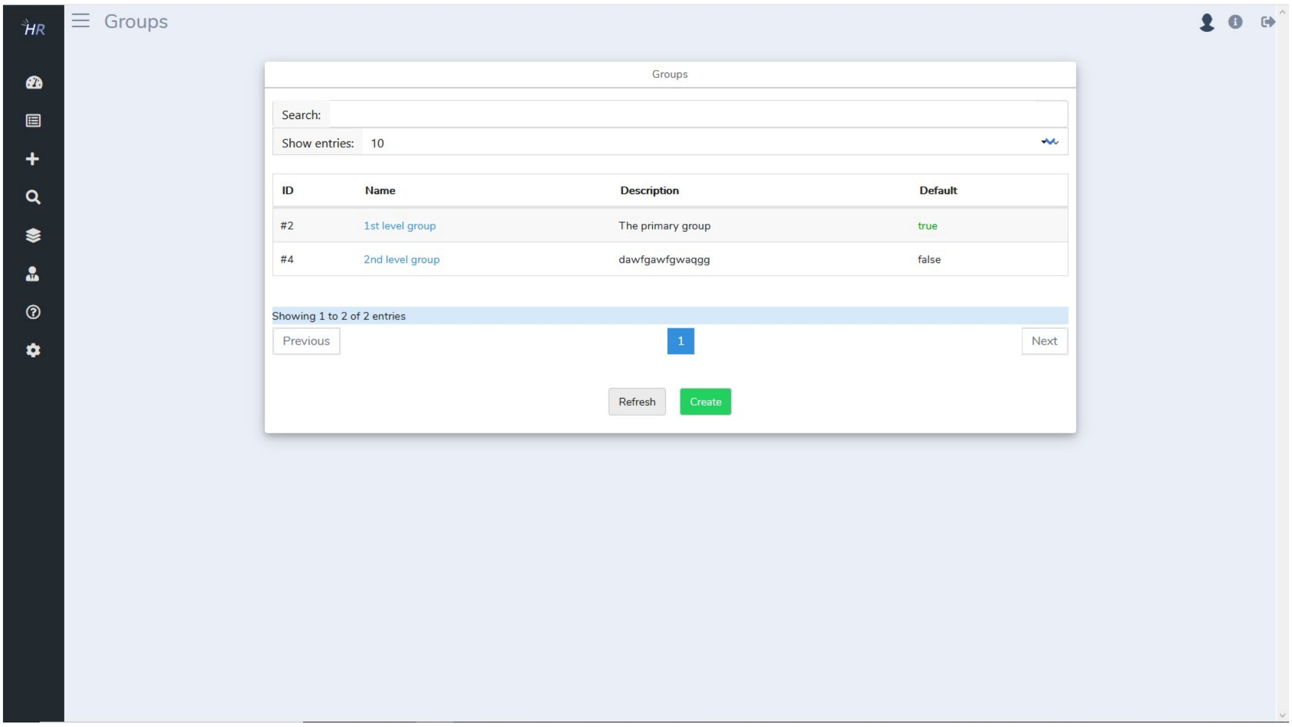
Note: It is also possible to reply to ticket notification emails in order to post to the ticket thread. A customer replying to a notification email will also lead to confirming their email address.

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



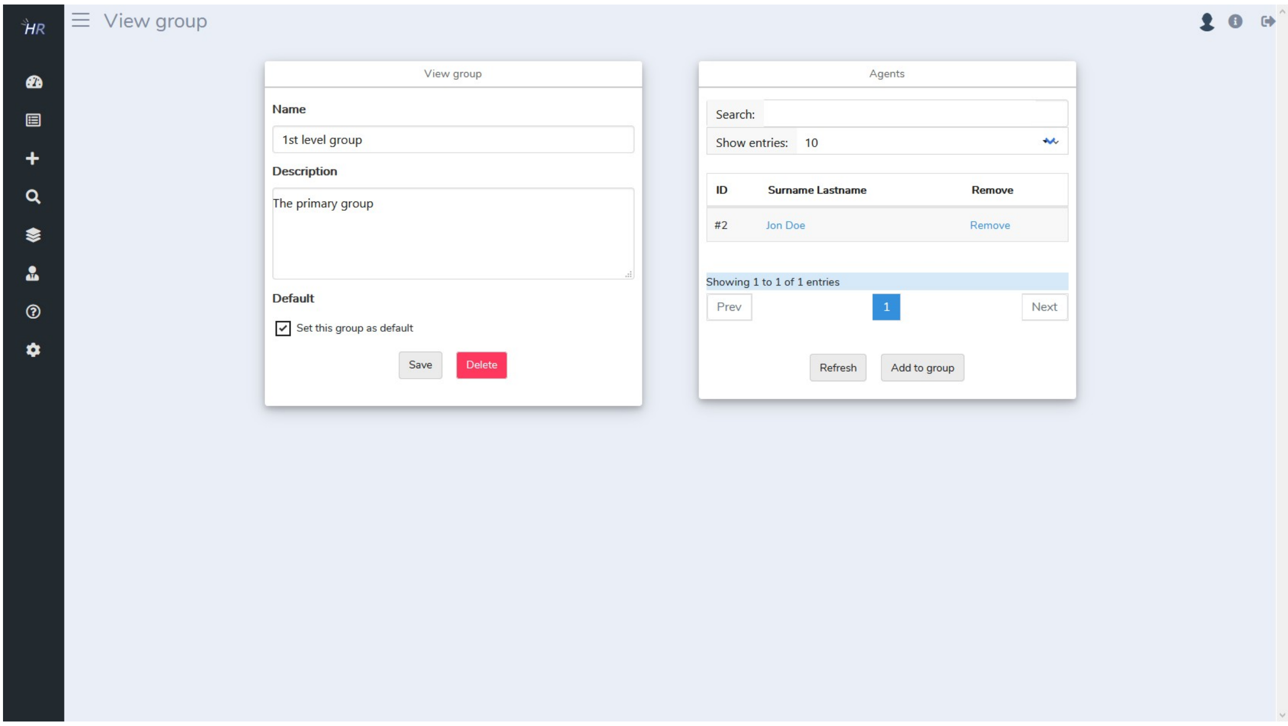
Groups

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.

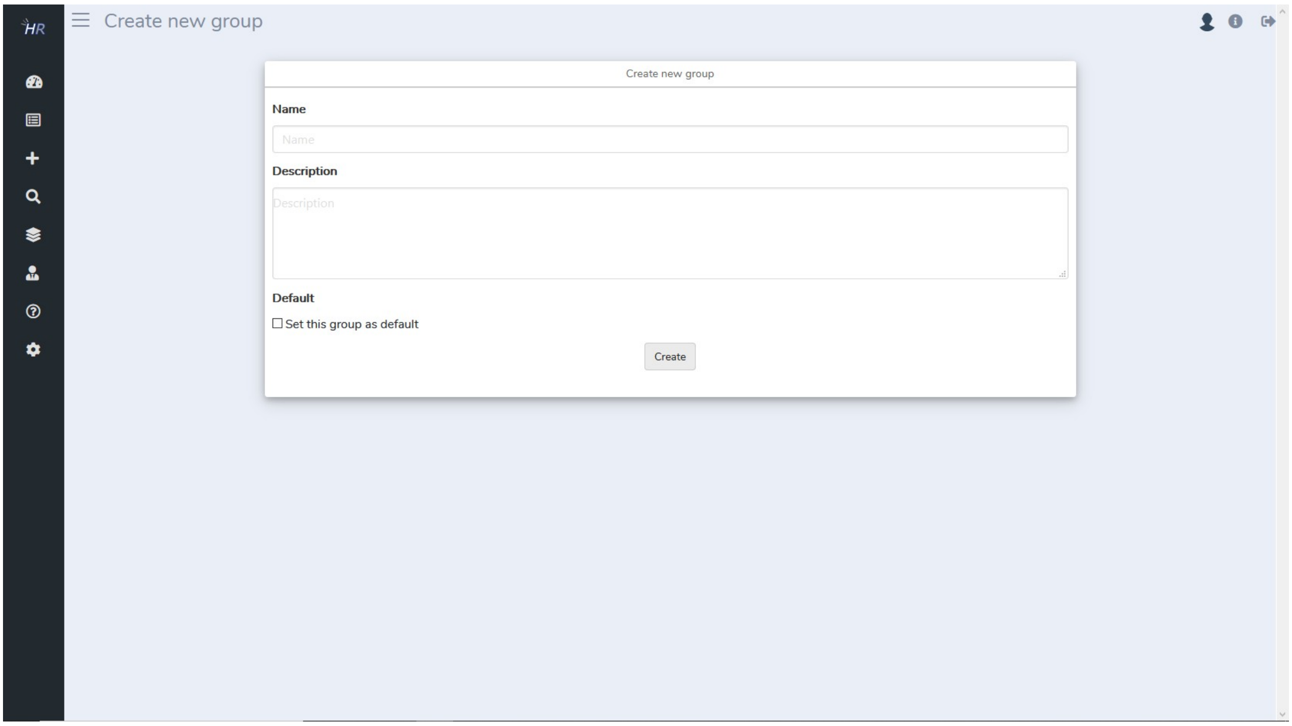


On group details view you can edit the group and also assign and remove agents

- 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



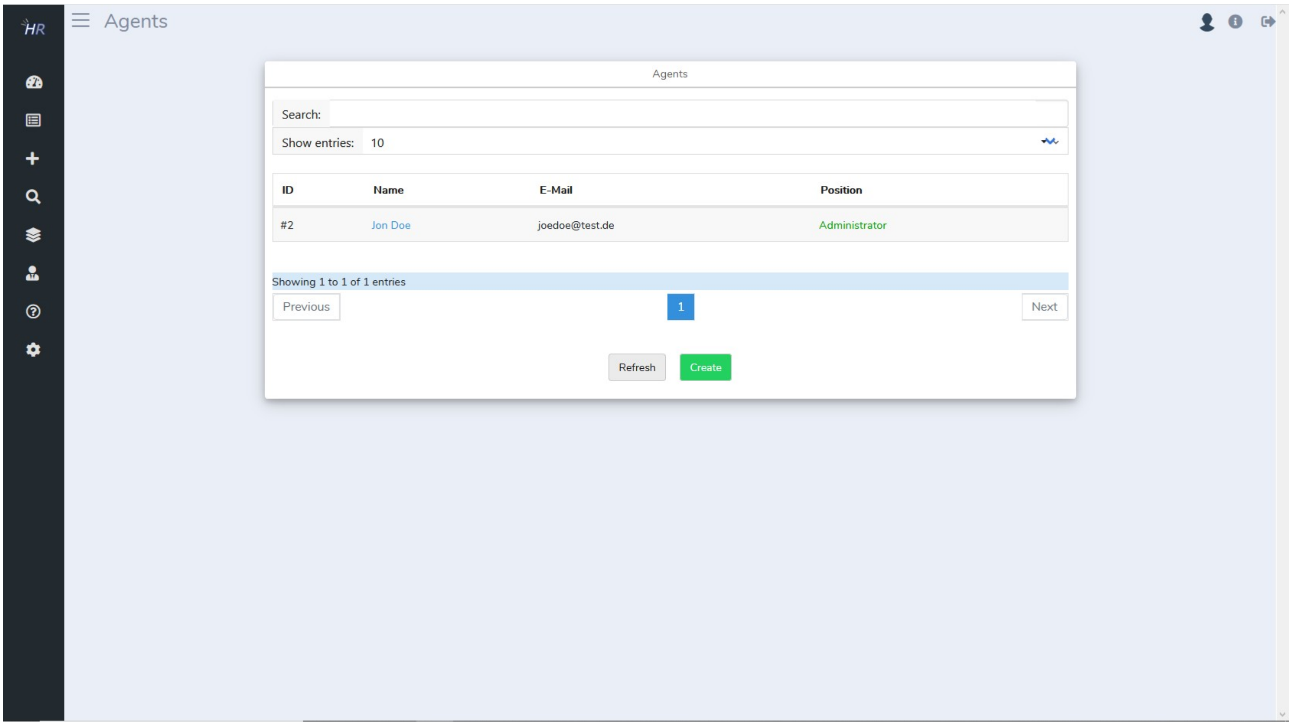
Back to the group list view, you can click „Create“ button to open a form where you can create a new group.

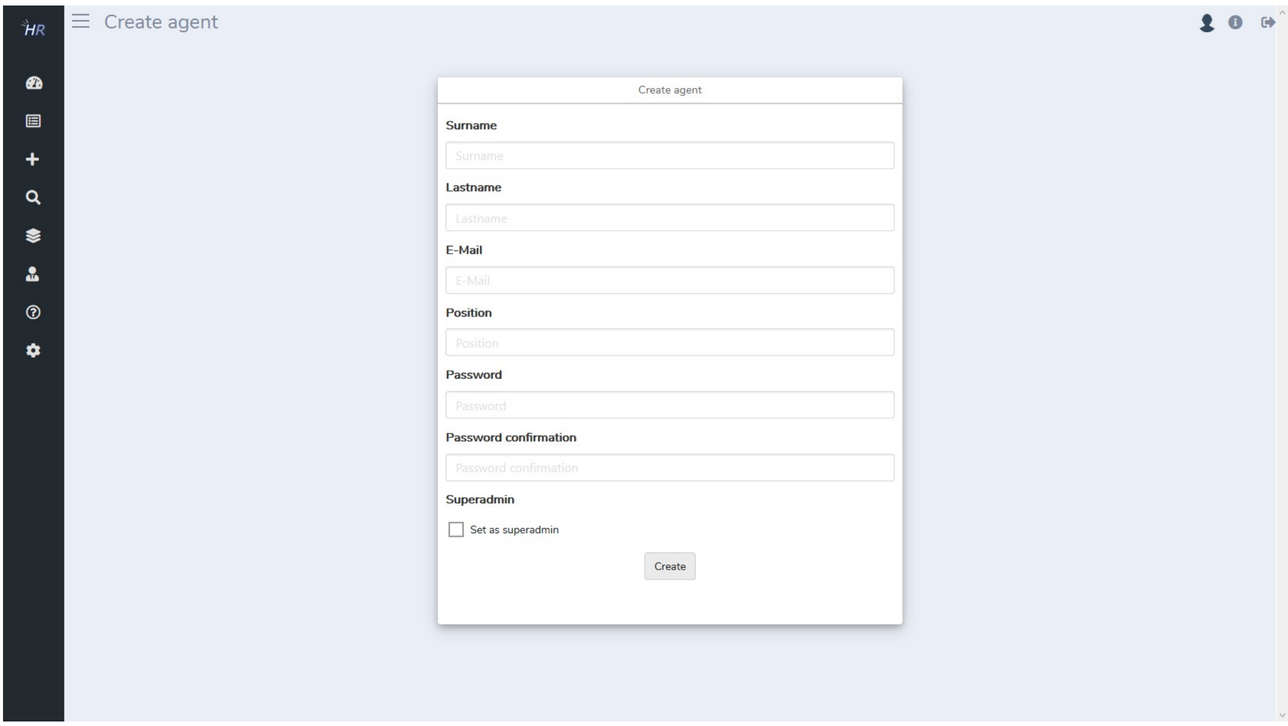


Note: Default group means that newly created tickets will be automatically inserted into the group. Only one group can be set as default. Setting multiple groups to default will be ignored.

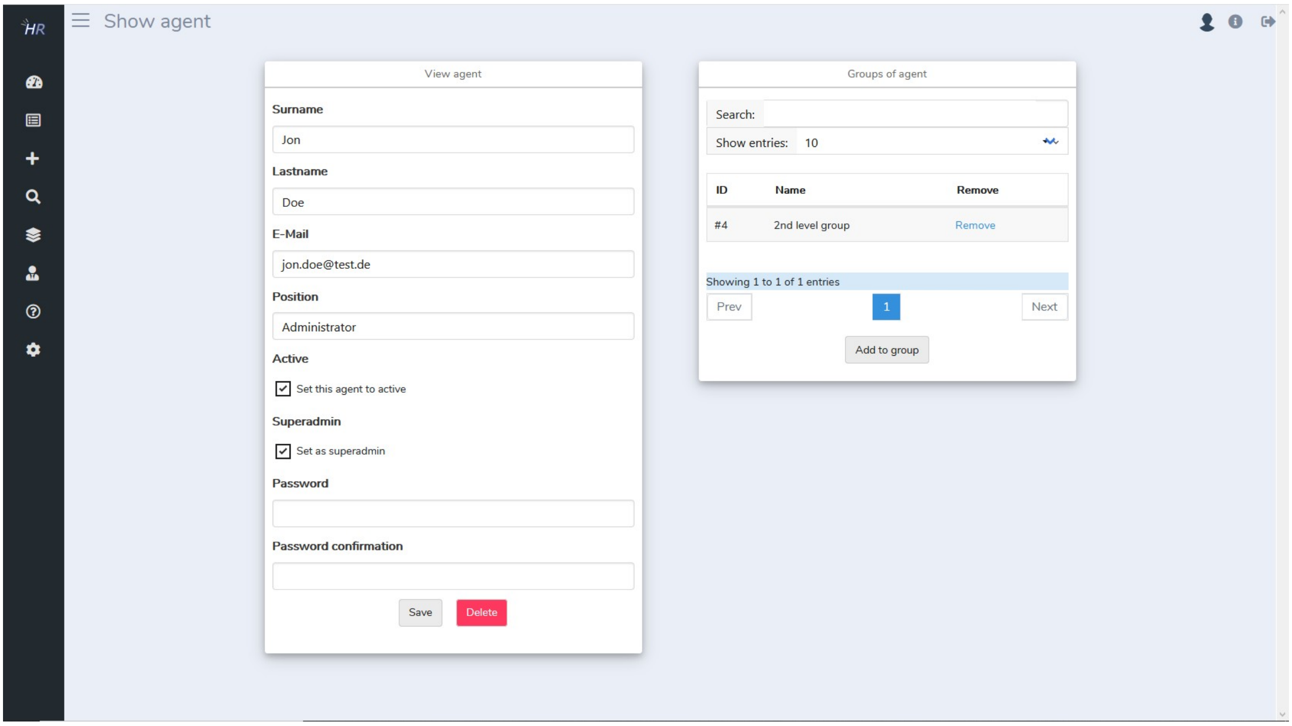
Agents

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.



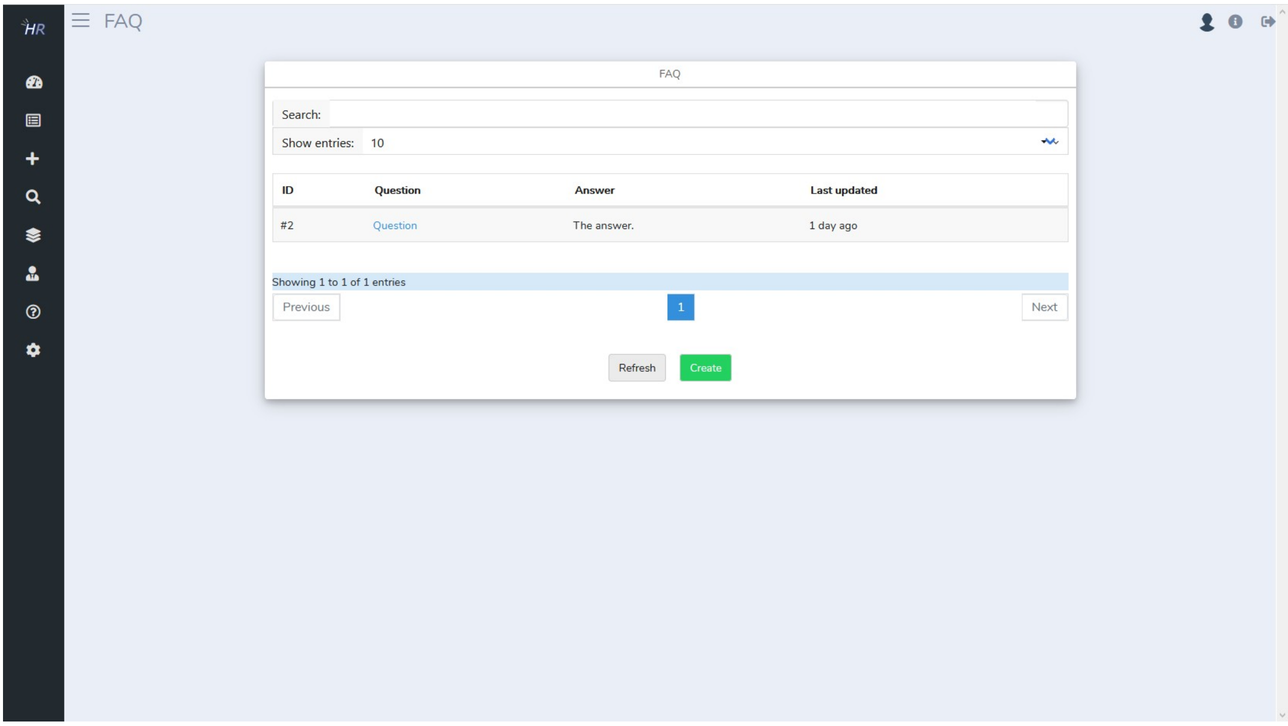


If an agent is currently not active you can disable the active flag. Non-active agents will not be able to login and can't be assigned to tickets. If an agent returns to work then you can set the agent to active again.

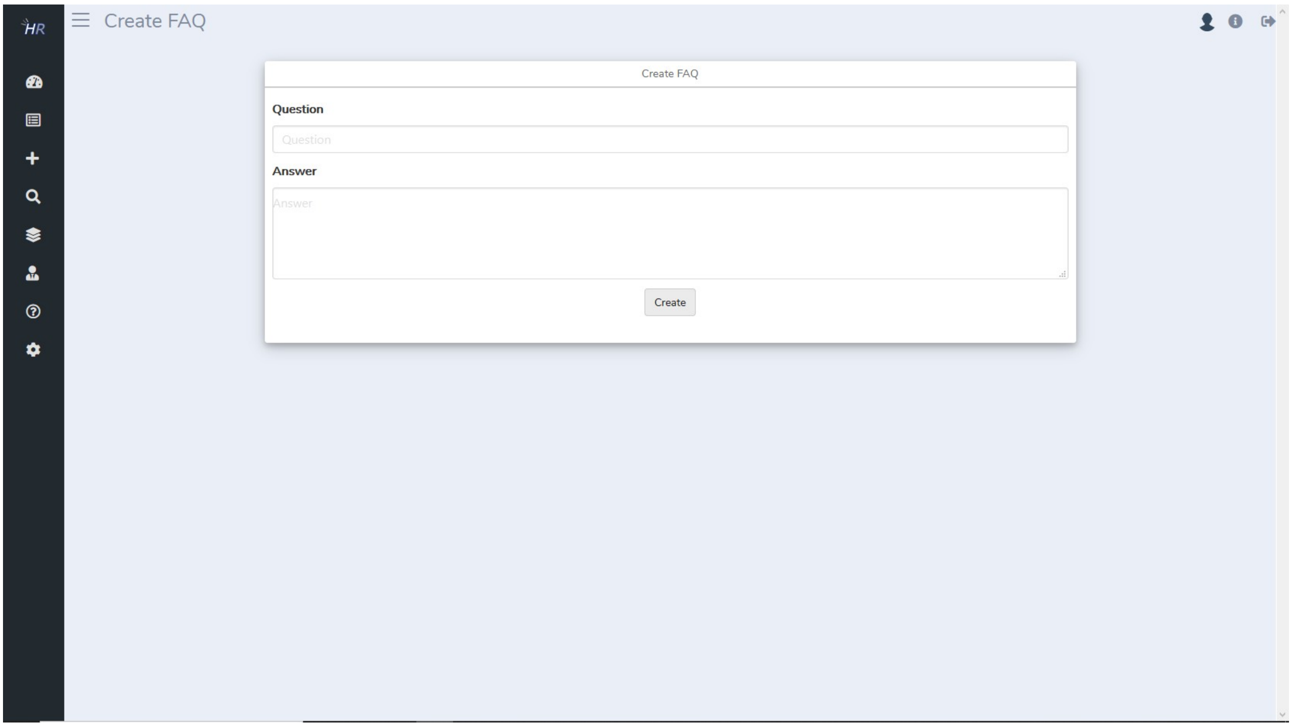


FAQ

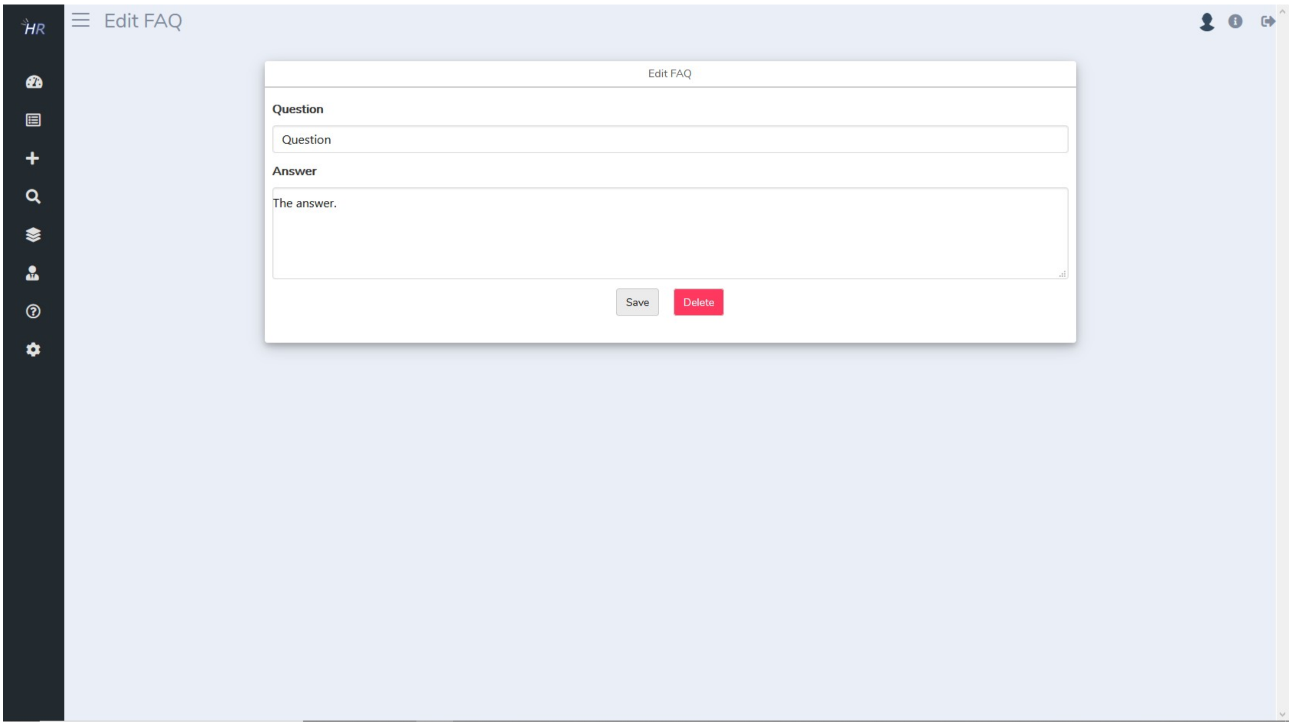
You can manage frequently asked questions here. FAQs can be used to provide answers to common questions so a customer doesn‘t need to create a ticket for any simple problem. Click the question mark item to view the list of FAQs.



Click the create button to create a new FAQ.

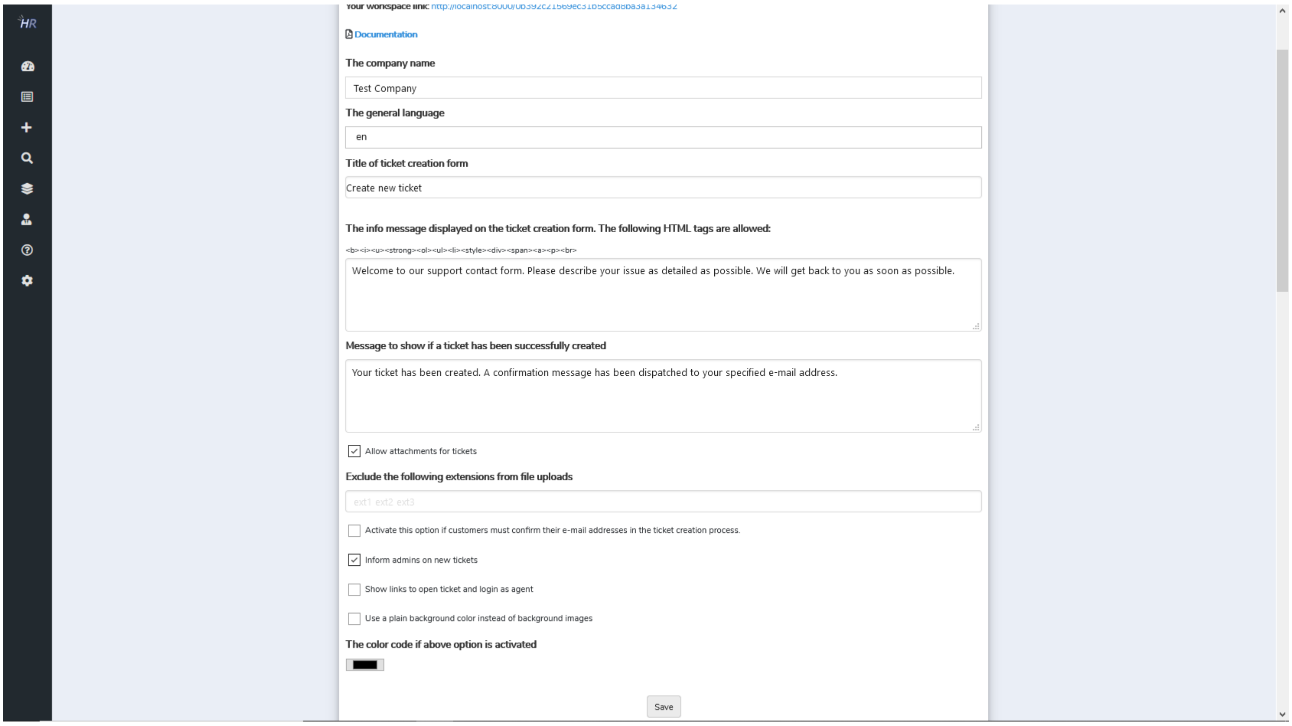


In the FAQ list you can click on an item in order to edit it.

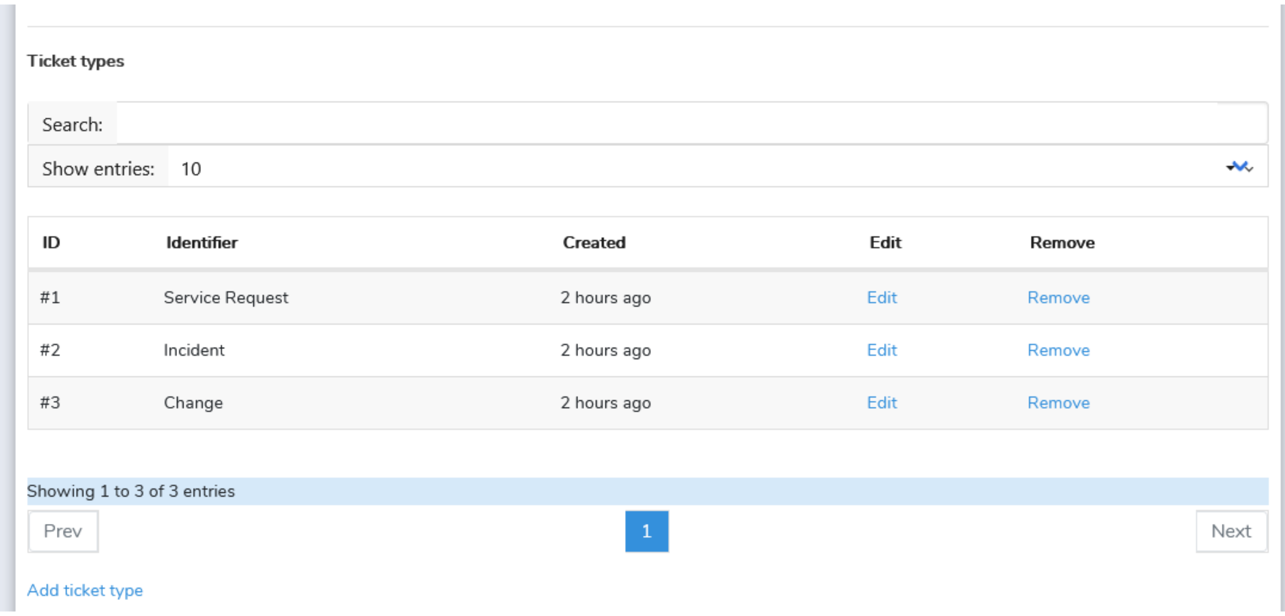

HR
Edit FAQ
Edit FAQ
Question
Question
Answer
The answer.
Save
Delete

System settings

Here you can manage system settings and view the documentation. You can set the company name, the global language (used for your customer views), the ticket form title, welcome message and success message, and ticket types and background mode. Global language is overritten by personal language that can be set by agents of their own profile (see settings section). Also you can define whether customers have to confirm their e-mail addresses during ticket creation process, admins shall receive a notification e-mail if a ticket is created, and flag to toggle file upload permission and a filter for disallowed file extensions for file upload (separated with one space, no dots).



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.


Ticket types

Search:

Show entries: 10

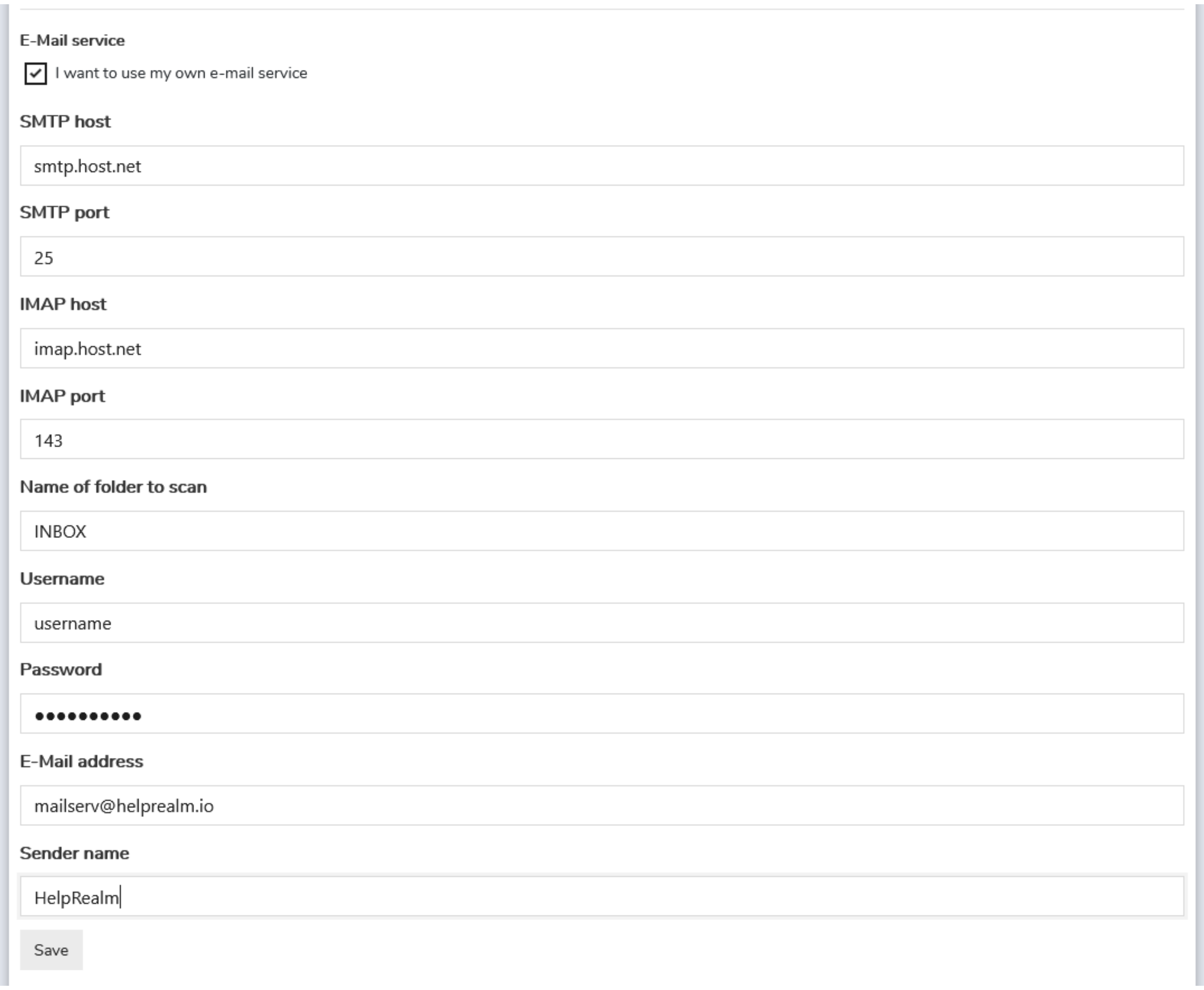
ID	Identifier	Created	Edit	Remove
#1	Service Request	2 hours ago	Edit	Remove
#2	Incident	2 hours ago	Edit	Remove
#3	Change	2 hours ago	Edit	Remove

Showing 1 to 3 of 3 entries

Prev 1 Next

Add ticket type

You can also use your own SMTP and IMAP e-mail service.



Fields:

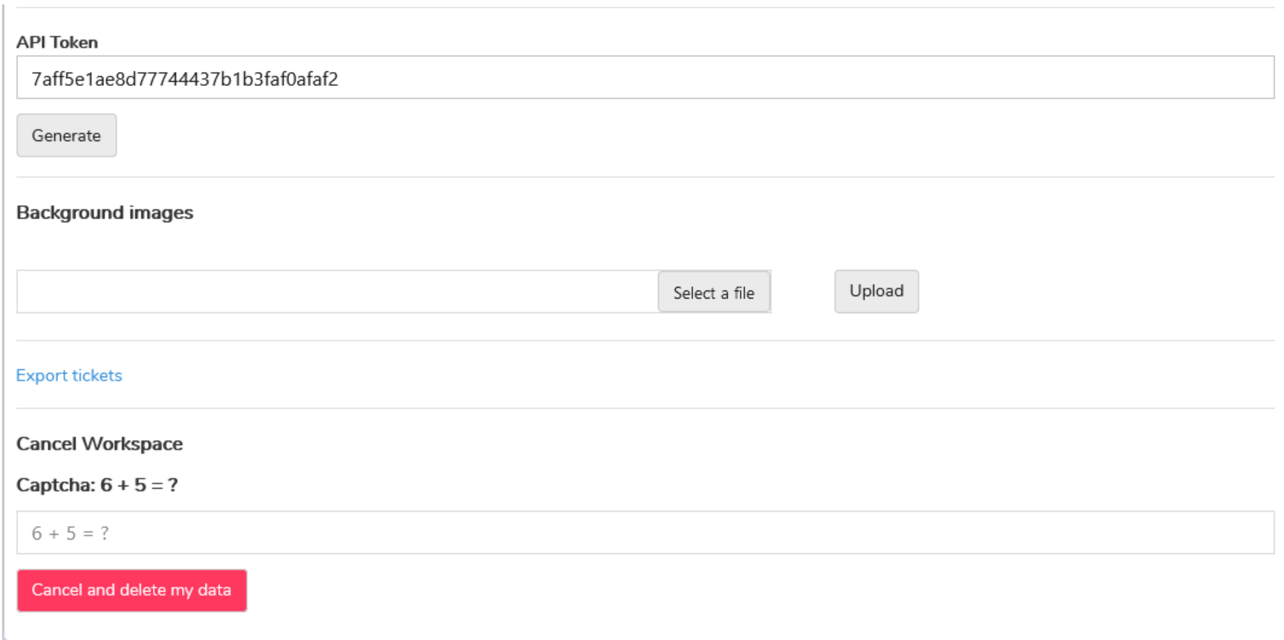
- SMTP host: Host address of your SMTP server
- SMTP port: Port of your SMTP server (normally you would not need to change this)
- IMAP host: Host address of your IMAP server
- IMAP port: Port of your IMAP server (normally you would not need to change this)
- Name of folder to scan: This is the folder where your e-mail provider stores incoming e-mails from your customers (e.g. when they directly reply to a ticket via e-mail). HelpRealm will scan this directory and handle the e-mails accordingly
- Username: Login name for your e-mail account
- Password: Password for your e-mail account
- E-Mail address: E-Mail address to be used
- Sender name: Normally this would be your company name

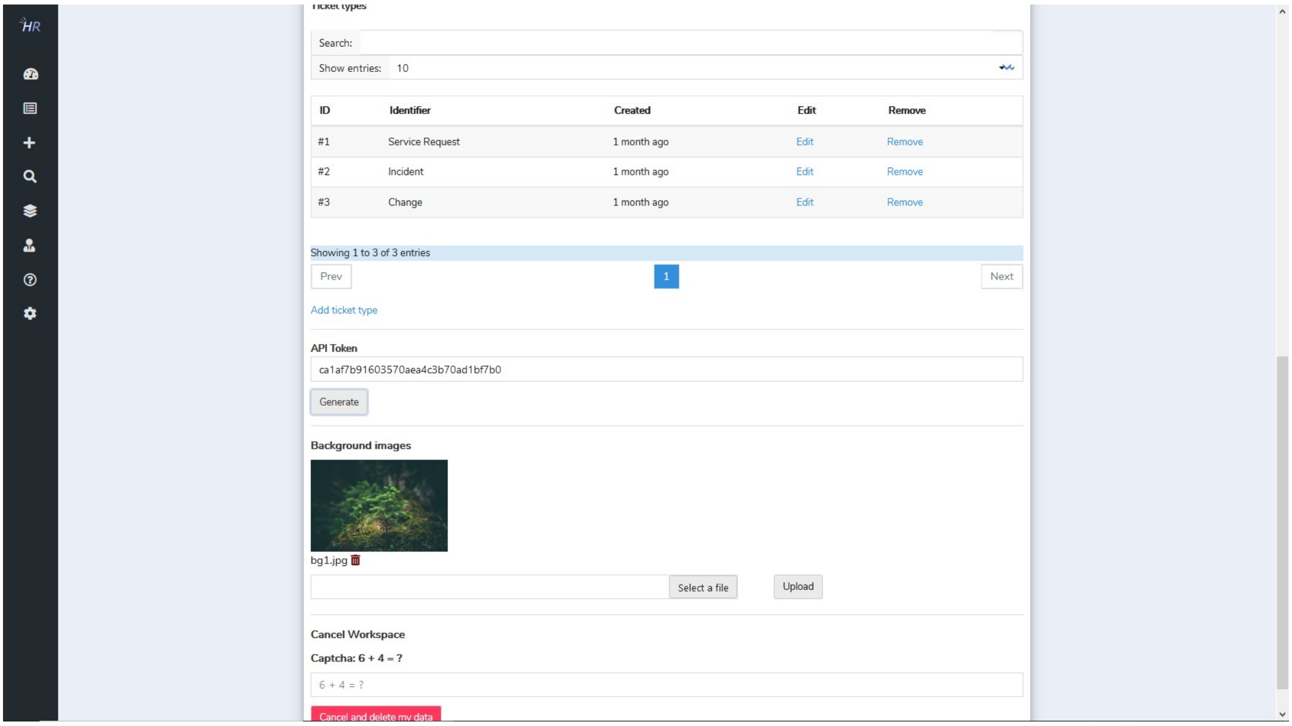
The API token is required if you want to use the API (see API section for details).

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.

Also you can export tickets from a specific creation date range. There are multiple formats supported.

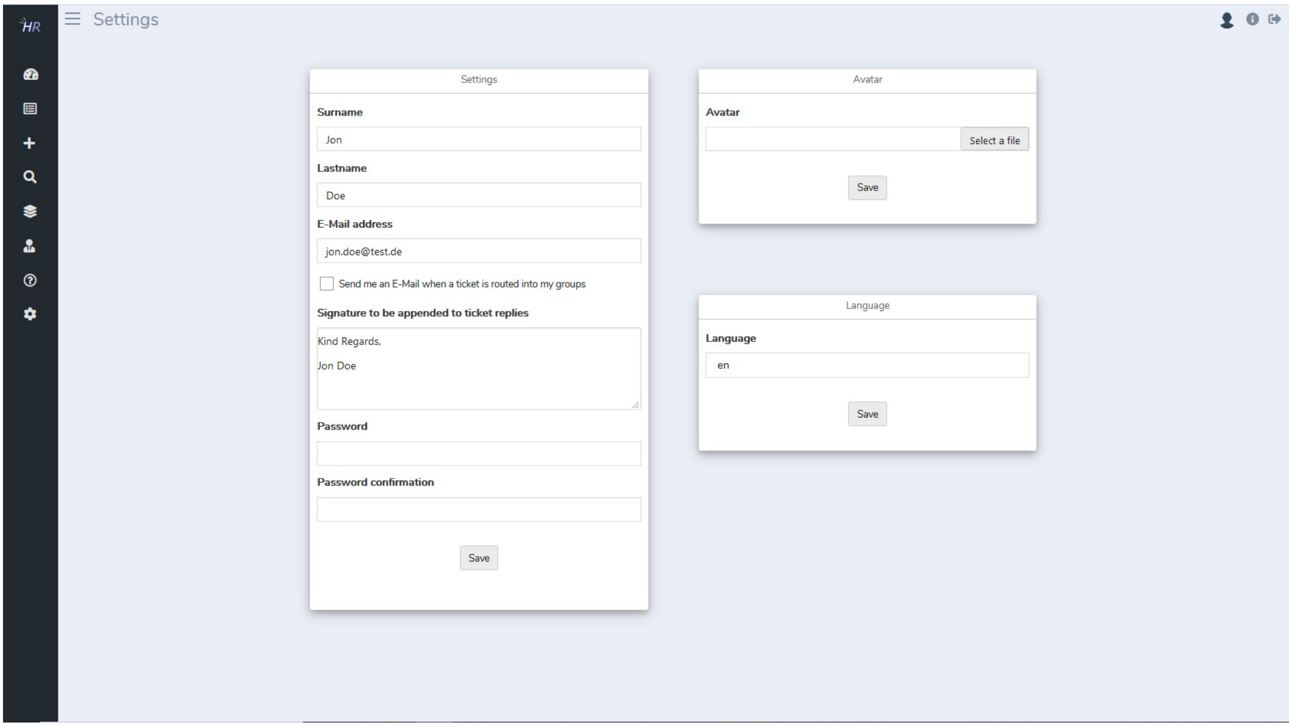
There is also a danger zone where you can cancel your workspace. This will result in erasing all your workspace data and cannot be undone.





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.



API Endpoint

In case you want to create a ticket programmatically, you can use the API.

In order to create a ticket, use the following URL: / api / { workspace } / ticket / create
Request method is POST. { workspace } is your workspace name hash.

In order to use the API you need an API token which needs to be provided with the request. You can generate a token via the system settings menu.

The following post data is expected:

Field	**Description**	**Requirements**
apitoken	The API token	Required, generated via system settings
subject	The subject of the ticket	Required, minimum 5 chars
text	The ticket text	Required, maximum 4096 chars
name	The name of the customer	Required
email	The e-mail address of the customer	Required
type	Ticket type	Required, must match the ID of one of your created ticket types
prio	Ticket priority	Required, 1 = low, 2 = medium, 3 = high
attachment	A file to be attached	Optional

The API endpoint will return a JSON response whose content depends on the operation result. Each response holds a ‚code‘ field which holds the HTTP status code of the operation as well as the workspace hash name.

The following response codes are possible:

Value	Description	Additional data
404 *Not Found*	- The workspace could not be found - The specified ticket type could not be found	- No workspace found: none - Ticket type not found: field ‚ticket_type‘ with the request value
403 Forbidden	The request API token is invalid	The invalid token in the field ‚apitoken‘.
500 *Internal Server Error*	- The post data is invalid - The ticket could not be created	- Invalid post data: field ‚invalid_fields‘ as an array containing an array for each failed post data item with the fields ‚name‘ for the field name and ‚value‘ for the failed value - Ticket not created: A field ‚data‘ with the data that could not be stored
429 *Too Many Requests*	You tried to create too many tickets in a period of time	Field ‚ticket_wait_time‘ that holds the time in seconds you have to wait until you may create a ticket again
201 *Created*	The ticket has been created	Field ‚data‘ containing the stored ticket data