

HelpRealm Documentation

Codename: dnyHelpRealm

Author: Daniel Brendel <dbrendel1988@gmail.com>

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.

Table of contents

Registration.....	2
Customer view.....	3
Dashboard.....	6
Tickets.....	7
Groups.....	10
Agents.....	13
FAQ.....	15
System settings.....	17
Profile Settings.....	21
API Endpoint.....	22

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](#)

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

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 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.

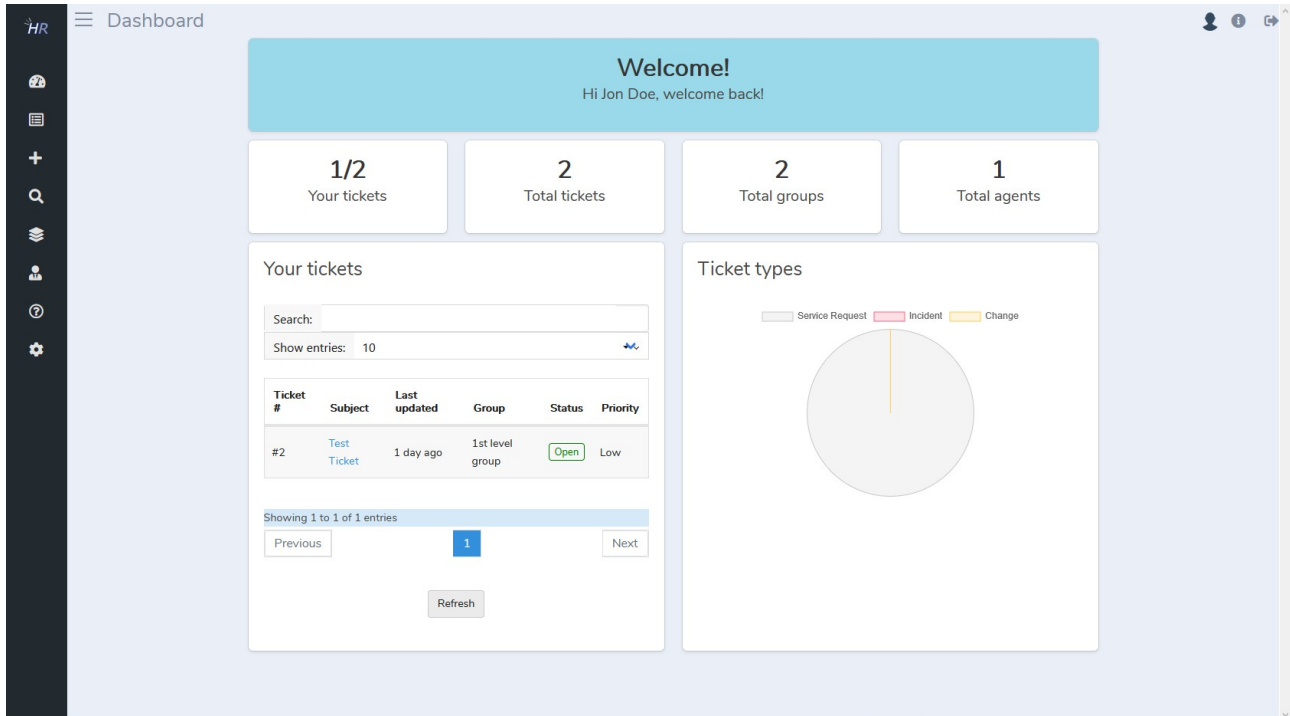
Customers will recieve e-mails for the associated events.

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:

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. It features a sidebar with navigation icons and a main content area with two tables. The first table, 'Your tickets', shows a single entry with Ticket #2, Subject 'Test Ticket', Last updated '1 day ago', Group '1st level group', Status 'Open', and Priority 'Low'. The second table, 'Tickets of your groups', shows two entries: Ticket #5 with Subject 'Another request', Last updated '10 hours ago', Group '1st level group', Status 'Awaiting confirmation', and Priority 'Low'; and Ticket #2 with Subject 'Test Ticket', Last updated '1 day ago', Group '1st level group', Status 'Open', and Priority 'Low'. Both tables have search bars, 'Show entries: 10', and pagination controls.

Ticket #	Subject	Last updated	Group	Status	Priority
#2	Test Ticket	1 day ago	1st level group	Open	Low

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

The screenshot shows the 'Ticket #1' interface. It features a sidebar with navigation icons and a main content area with two panels. The left panel, '#1: Test Ticket', shows ticket details: 'A test description.', 'Waiting' status, 'High' priority, 'Incident' type, 'Created for Sally Doe', and 'Assignee: Jon Doe'. It also has an 'Attachments' section with a 'Select a file' button and an 'Upload' button, and a 'Notes' section with a 'Save' button. The right panel, 'Thread', shows a conversation with 'Jon Doe' (2 days ago) and 'Sally Doe' (1 month ago), including a 'Post' button and a '4098' character count.

#1: Test Ticket

A test description.

Waiting

High

Incident

Created for Sally Doe

Assignee: Jon Doe

Attachments

Select a file

Upload

Notes

Save

Thread

Enter your text...

Post

4098

Jon Doe

2 days ago

A response message

Edit

Sally Doe

1 month ago

Additional info message

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

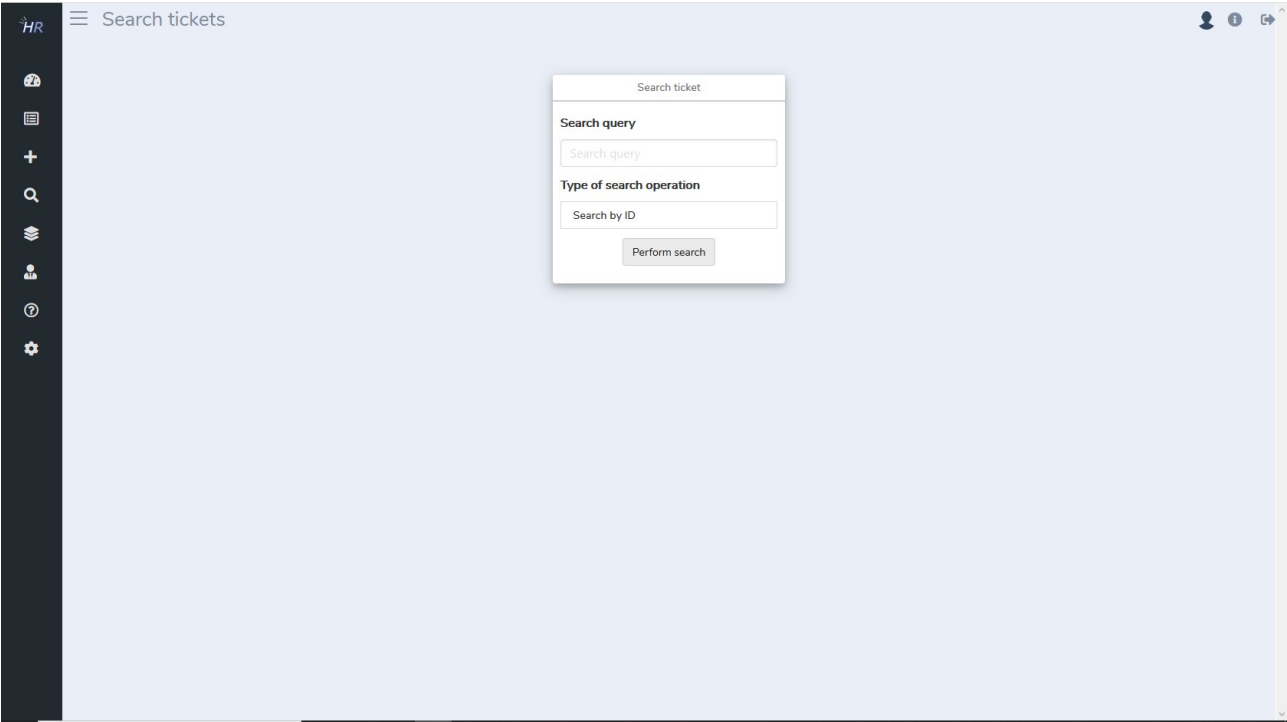
Click the „Hash“ link in order to view the ticket hash. You can share it with the customer.

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 white modal titled 'Groups'. It features a search input field, a 'Show entries' dropdown menu 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 a blue box. 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' dropdown set to 10, 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, it says 'Showing 1 to 1 of 1 entries' and includes 'Previous' and 'Next' buttons. At the bottom of the modal, 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 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 overridden 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).

Your workspace url: http://ocapihost-ouuuufjdn-29zcc7f1m9nrc3id3cccdddbd8391g4w5.v

[Documentation](#)

The company name
Test Company

The general language
en

Title of ticket creation form
Create new ticket

The info message displayed on the ticket creation form. The following HTML tags are allowed:
`<i><u>
</i></u></i></u>`

Welcome to our support contact form. Please describe your issue as detailed as possible. We will get back to you as soon as possible.

Message to show if a ticket has been successfully created
Your ticket has been created. A confirmation message has been dispatched to your specified e-mail address.

☒ Allow attachments for tickets

Exclude the following extensions from file uploads
exe1 exe2 exe3

☐ Activate this option if customers must confirm their e-mail addresses in the ticket creation process.

☒ Inform admins on new tickets

☐ Show links to open ticket and login as agent

☐ Use a plain background color instead of background images

The color code if above option is activated
#000000

Save

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.

E-Mail service
☒ I want to use my own e-mail service

SMTP host

SMTP port

IMAP host

IMAP port

Name of folder to scan

Username

Password

E-Mail address

Sender name

Save

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.

API Token

7aff5e1ae8d77744437b1b3faf0afaf2

Generate

Background images

Select a file

Upload

Export tickets

Cancel Workspace

Captcha: 6 + 5 = ?

6 + 5 = ?

Cancel and delete my data

HR

Ticket types

Search:

Show entries: 10

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

Showing 1 to 3 of 3 entries

Prev 1 Next

[Add ticket type](#)

API Token

Generate

Background images

bg1.jpg

Select a file
Upload

Cancel Workspace

Captcha: 6 + 4 = ?

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.

[illegible]

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 <i>Not Found</i>	<ul style="list-style-type: none">- The workspace could not be found- The specified ticket type could not be found	<ul style="list-style-type: none">- 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 <i>Internal Server Error</i>	<ul style="list-style-type: none">- The post data is invalid- The ticket could not be created	<ul style="list-style-type: none">- 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 <i>Too Many Requests</i>	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 <i>Created</i>	The ticket has been created	Field ,data' containing the stored ticket data