

HelpRealm Documentation

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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". There are also "Sign up" and "Login" buttons in the top right corner.

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.

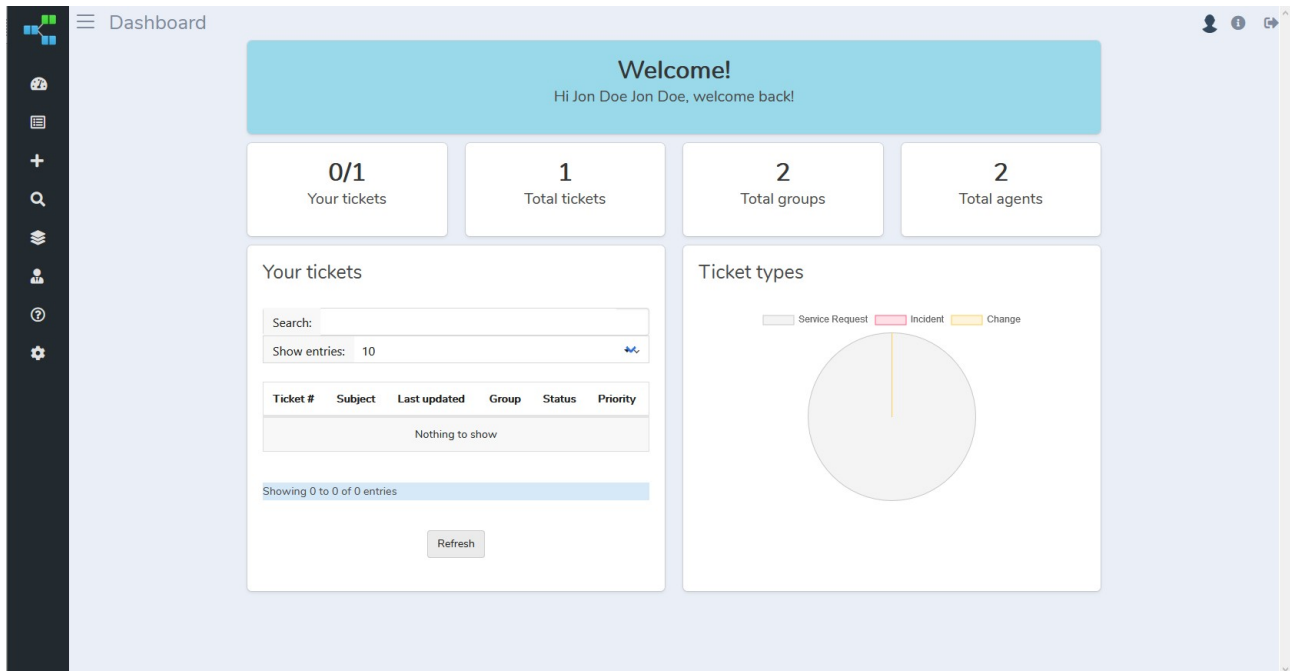
The FAQ overlay looks as follows:

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.

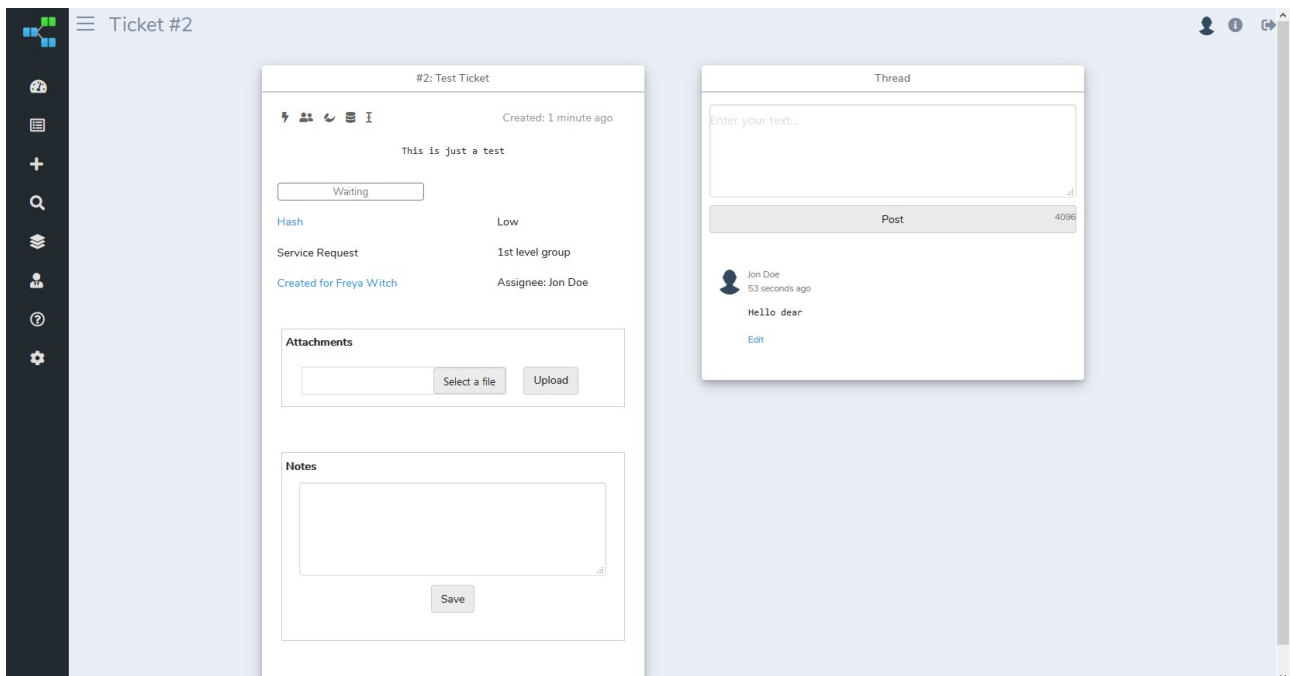
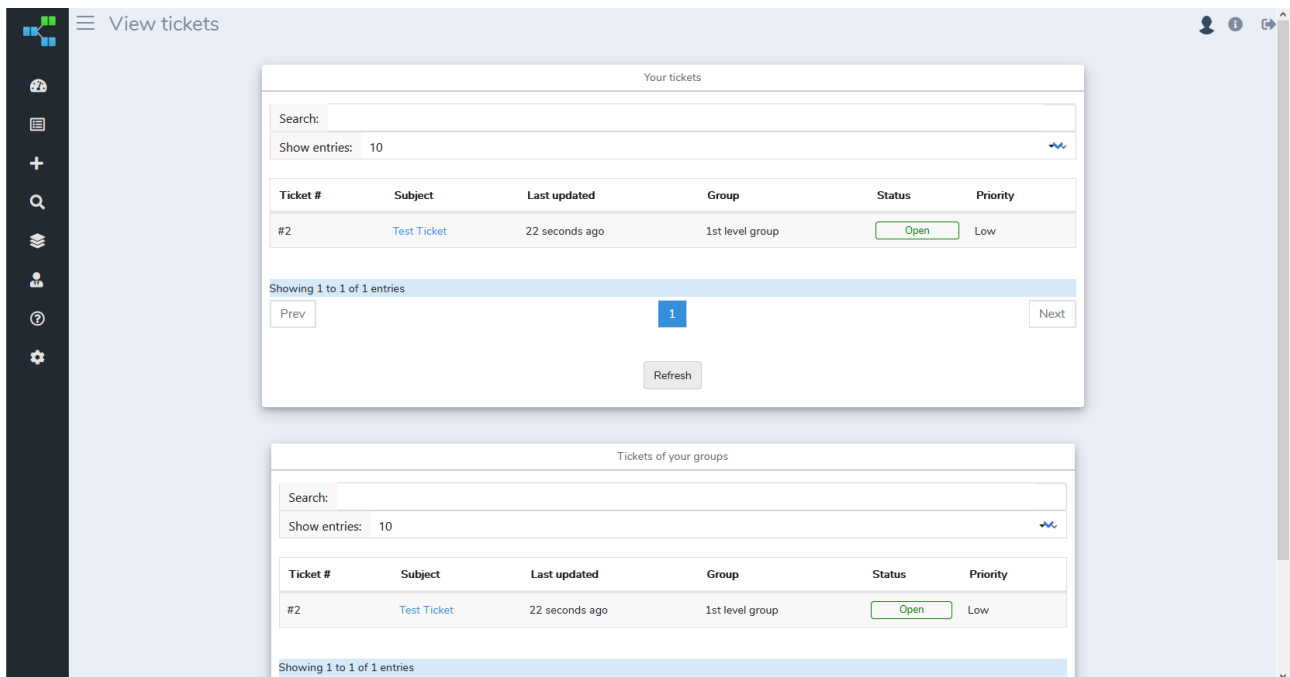


On left side there a menu. It covers the following items:

- 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.



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.

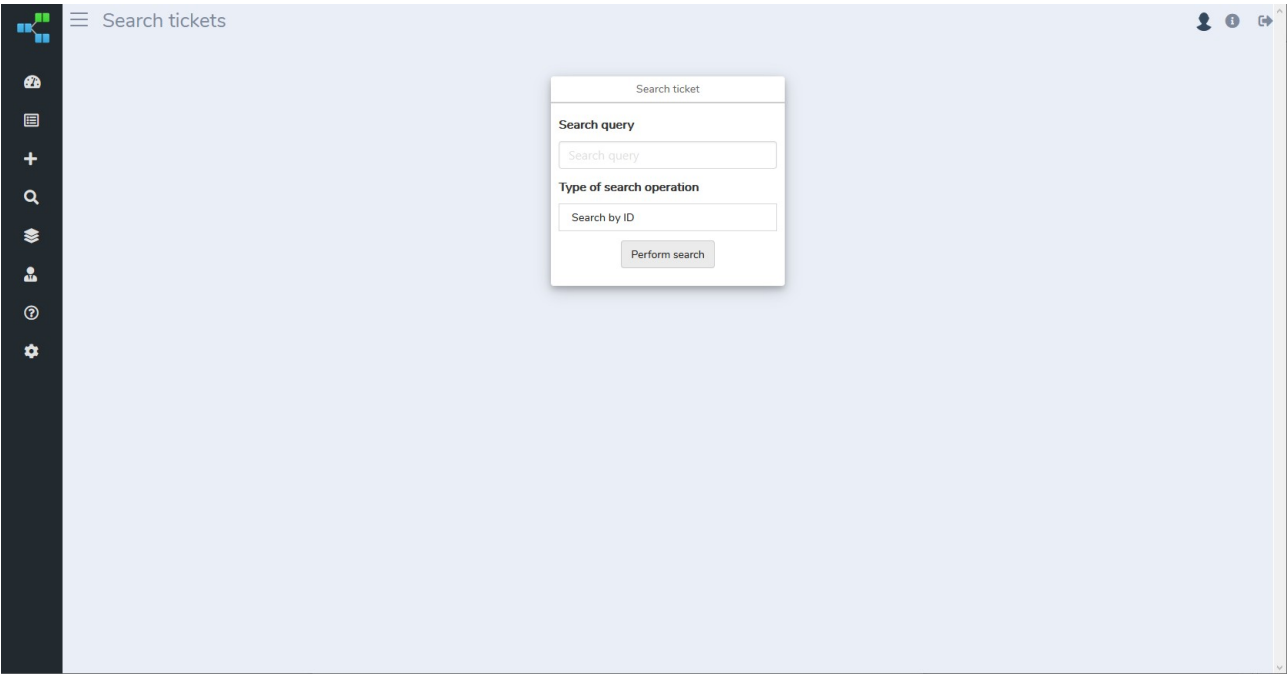
You can create tickets for customers. Therefore click on the „+“ icon:

The screenshot shows a web application interface for creating a new ticket. The main area is light blue. On the left is a dark sidebar with icons for home, list, add, search, layers, user, help, and settings. The top of the main area has a 'Create new ticket' header. In the center is a white form titled 'Create new ticket'. The form contains the following fields:

- Name**: A text input field with the placeholder 'Name'.
- E-Mail**: A text input field with the placeholder 'E-Mail'.
- Subject**: A text input field with the placeholder 'Subject'.
- Text**: A large text area with the placeholder 'Text'.
- Type**: A dropdown menu with 'Service Request' selected.
- Priority**: A dropdown menu with 'Low' selected.
- Group**: A dropdown menu with '1st level group' selected.
- Assignee**: A dropdown menu with '-' selected.

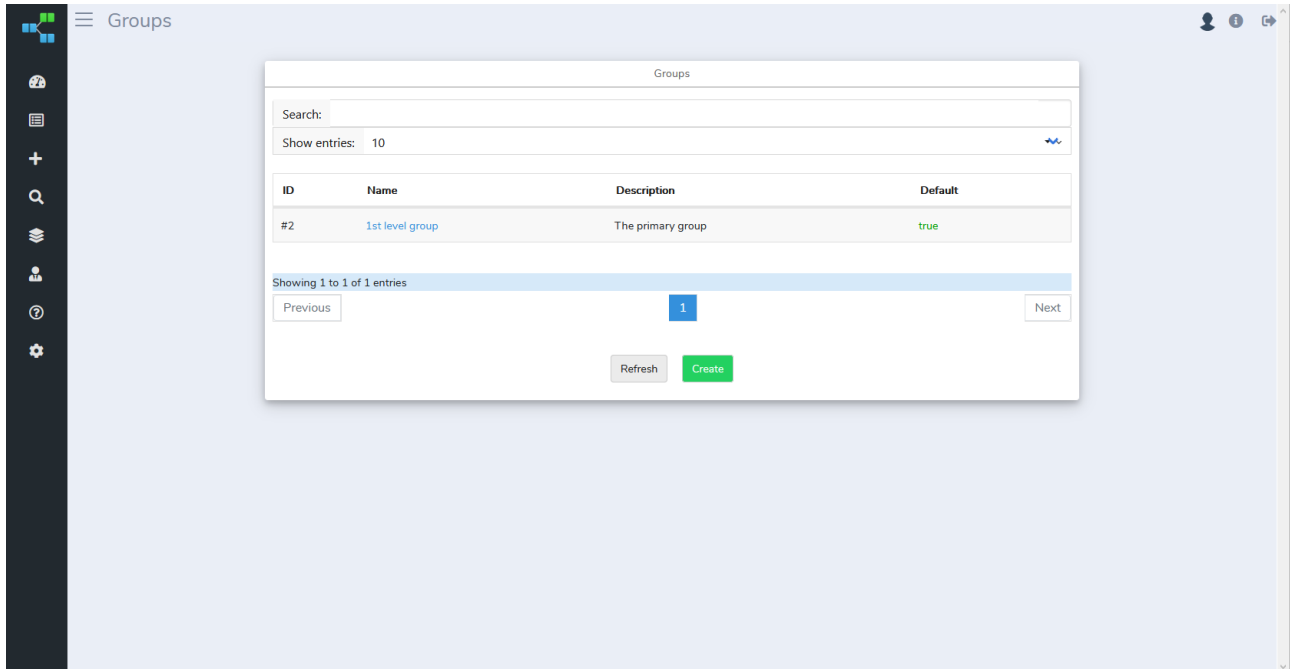
All fields are mandatory. You don't need to specify an agent if you want to just have it in a group and let the agents decide who takes it.

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.



The screenshot displays a web application interface for managing groups. On the left is a dark sidebar with icons for navigation. The main area has a light blue header with a hamburger menu and the title 'Groups'. A modal window titled 'Groups' is centered, containing a search bar, a 'Show entries: 10' dropdown, and a table. The table has columns for ID, Name, Description, and Default. It lists one group with ID #2, Name '1st level group', Description 'The primary group', and Default 'true'. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries' with 'Previous', '1', and 'Next' buttons. At the bottom of the modal are 'Refresh' and 'Create' buttons.

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

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, a sidebar contains icons for home, list, add, search, layers, users, help, and settings. 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 with columns 'ID', 'Surname Lastname', and 'Remove'. The table contains one entry: '#2', '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 are 'Refresh' and 'Add to group' buttons.

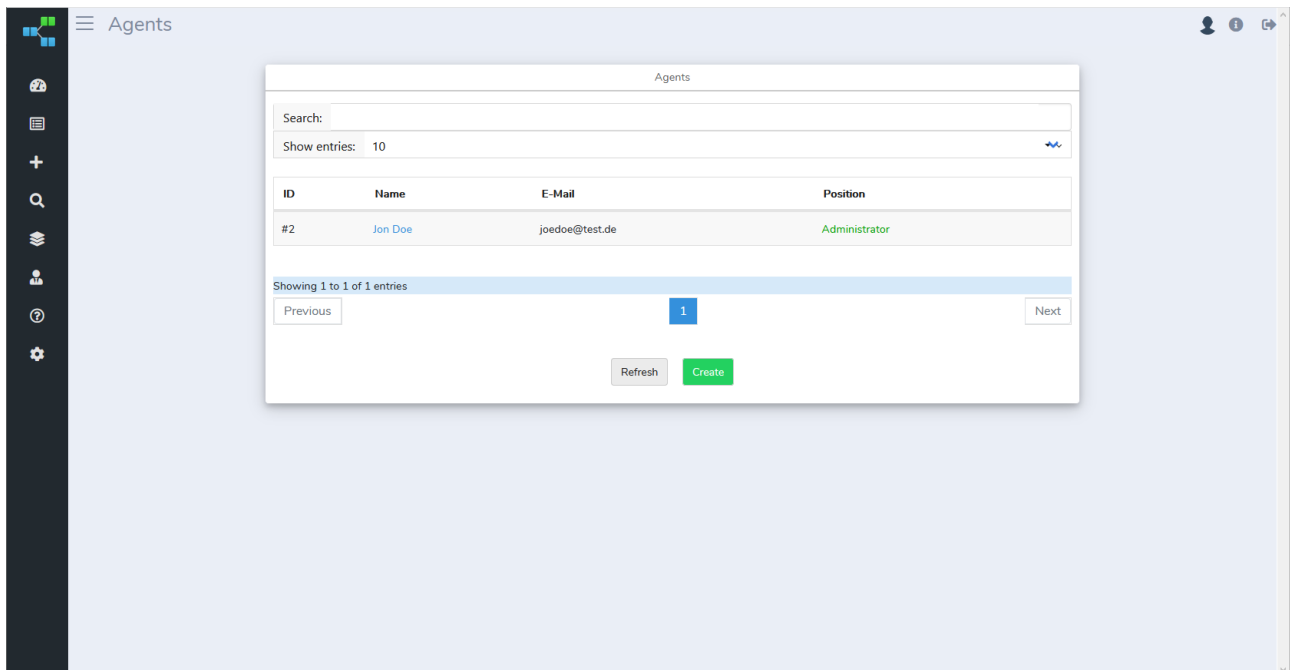
Back to the group list view, you can click „Create“ button to open a form where you can create a new group.

The screenshot shows the 'Create new group' interface. The sidebar is the same as in the previous screenshot. The main area is titled 'Create new group' and contains a form with fields for 'Name' (containing 'Name') and 'Description' (containing 'Description'). Below these is a 'Default' section with an unchecked checkbox 'Set this group as default' and a 'Create' button.

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.



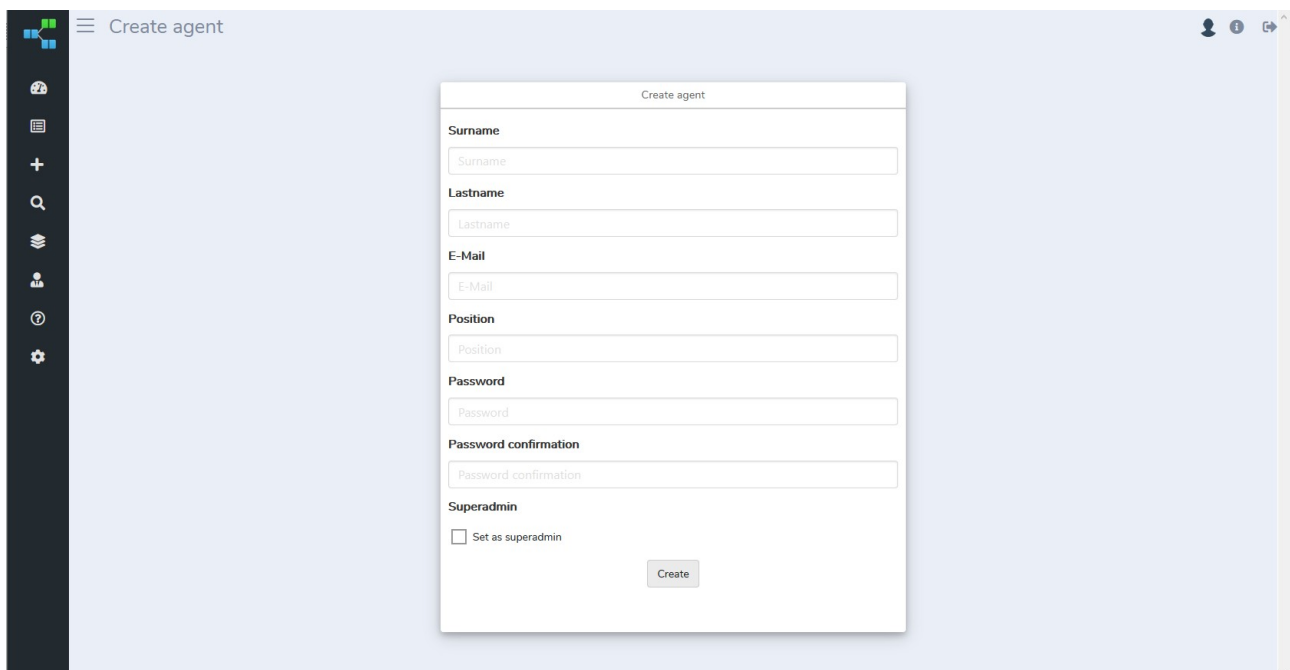
The screenshot shows the 'Agents' management page. It features a search bar, a table with one agent entry, and pagination controls.

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 the 'Create agent' form. It includes fields for Surname, Lastname, E-Mail, Position, Password, and Password confirmation, along with a checkbox for 'Set as superadmin'.

Surname

Lastname

E-Mail

Position

Password

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	Remove

Showing 1 to 1 of 1 entries

Prev

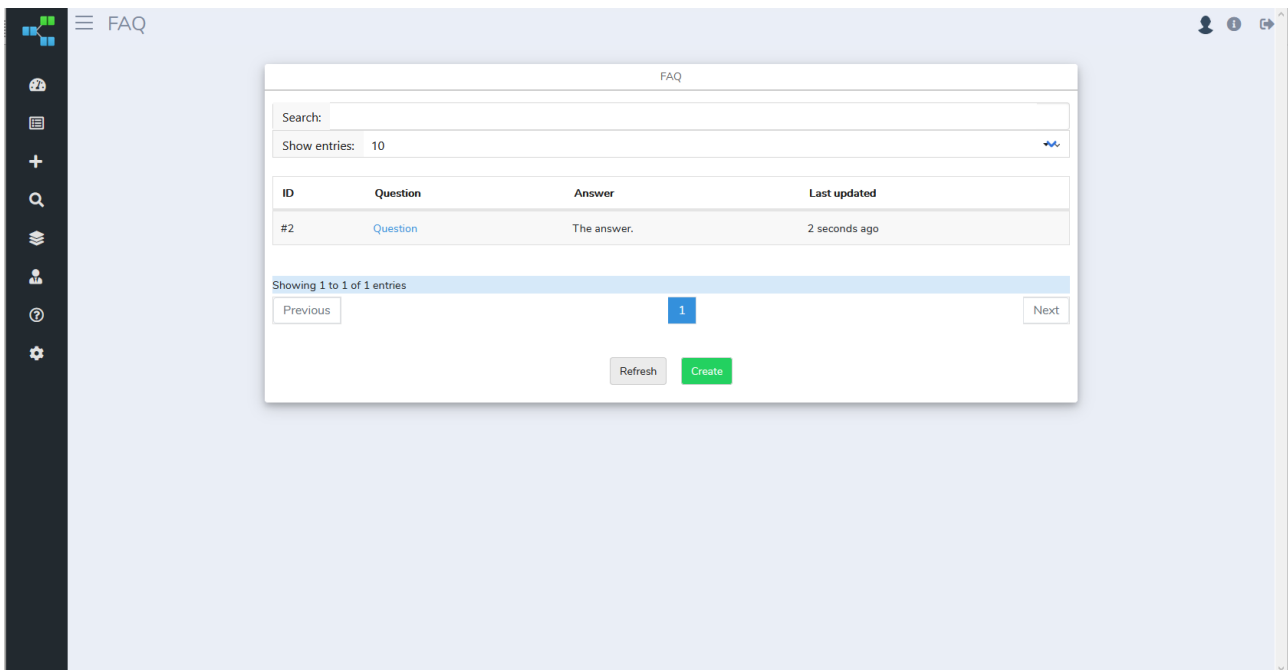
1

Next

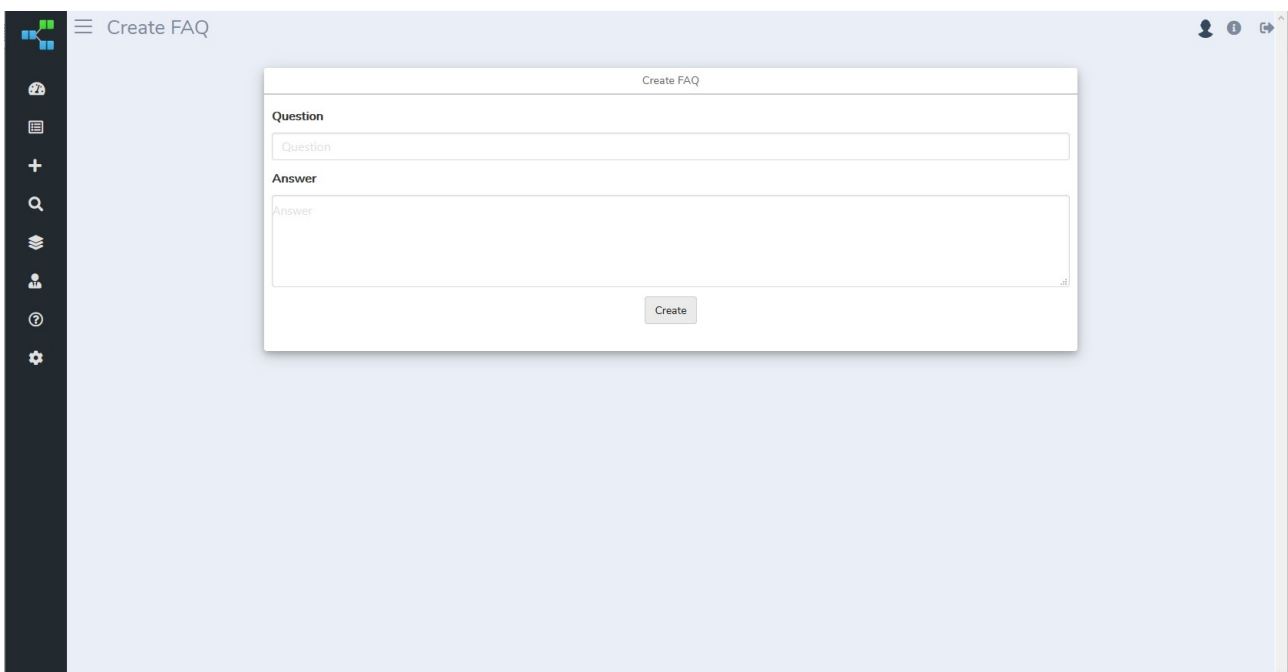
Add to group

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.

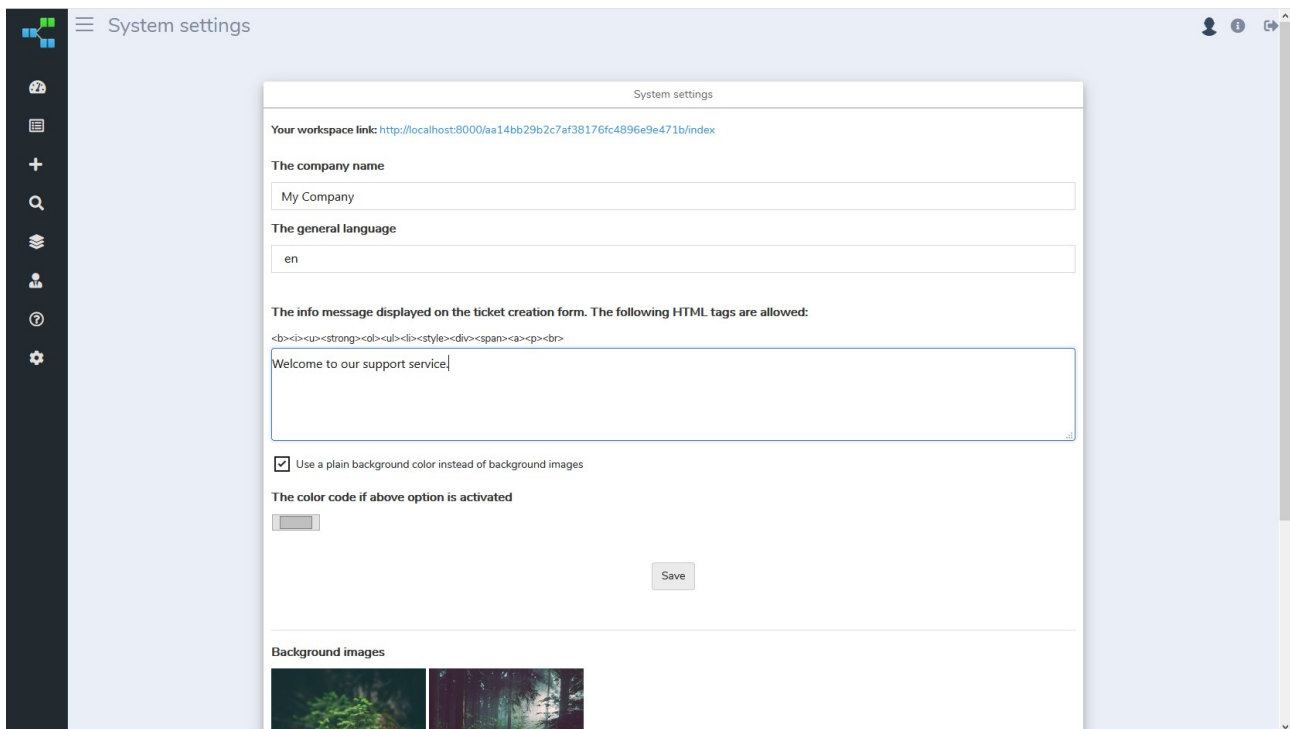
Save

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 and background mode. Global language is overridden by personal language that can be set by agents of their own profile (see settings section).

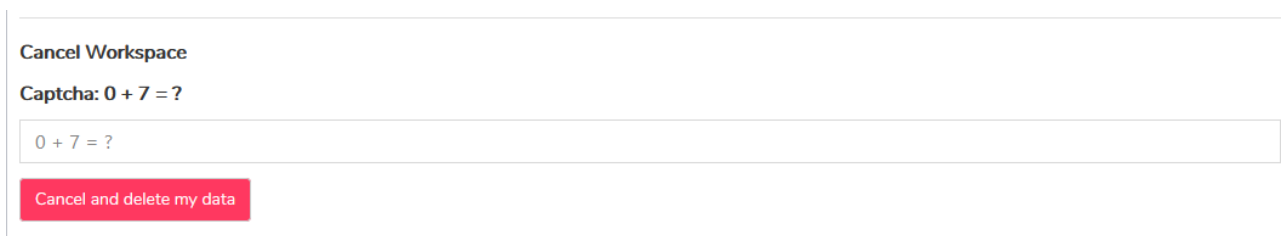
Regarding the background mode you can specify whether background images or a plain background color shall be used in the customer views. And also you can upload new background images or delete existing ones.



The screenshot shows the 'System settings' interface. On the left is a dark sidebar with icons for home, settings, search, and other functions. The main content area is titled 'System settings' and contains the following fields:

- Your workspace link:** <http://localhost:8000/aa14bb29b2c7af38176fc4896e9e471b/index>
- The company name:**
- The general language:**
- The info message displayed on the ticket creation form. The following HTML tags are allowed:**
`<i><u><style><div><a><p>
`
- ☒ Use a plain background color instead of background images
- The color code if above option is activated**
-
- Background images**


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.



The screenshot shows the 'Cancel Workspace' form. It includes a captcha question: 'Captcha: 0 + 7 = ?'. Below the question is a text input field containing '0 + 7 = ?'. At the bottom is a red button labeled 'Cancel and delete my data'.

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, search, and other functions. The main content area has a light blue background and a 'Settings' header. Three white panels are shown: 'Settings' (with fields for Surname, Lastname, E-Mail address, Password, and Password confirmation), 'Avatar' (with a file selection button and a save button), and 'Language' (with a dropdown menu and a save button).

Settings

Surname

Lastname

E-Mail address

Password

Password confirmation

Avatar

Avatar

Language

Language