User Manual

Support System Module v1.x

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1.) Introduction

The Support System module provides an easy and efficient way for your business to provide quality customer support to your members, customers, and the general public. Many features are included with this module including, multiple support techs, departments, categories, pre-written responses, full notification system, plus more. There are also powerful administrative features, allowing you and fellow administrators to oversee all support requests flowing through the system, and all support techs.

2.) Getting Started

This chapter explains how to get started using the Support System module, once it has already been installed on your web server. If the module has not yet been installed on your server, you may do so through the *Setup->Install Modules / Upgrades* menu of the Admin Control Panel.

2.1 Reload Crontab File

Once the Support System has been installed on your web server, you must first reload your Crontab file to ensure everything works correctly. This can be done by logging into your web server via SSH, and changing directories to the */xflow_data/* directory on your server. Once there, type the following at the SSH prompt:

crontab xflow.crontab

If you do not know how, or do not feel comfortable reloading your Crontab file, please submit a support request to customer support, asking them to reload your crontab file for you.

2.2 General Settings

First, you should take a quick look at the *Setup->General Settings* menu of the Admin Control Panel. There are only a simple four question, but you should make sure everything is setup as you want.

2.3 Create Departments

The Support System fully supports multiple departments. This allows you to better organize and group support requests, to ensure they are routed to the correct people. Some examples of departments are sales, billing, technical and administration departments. You can create all needed departments through the *Setup->Department Settings* menu. You must create at least one department in order for the Support System to work correctly.

2.4 Create Support Techs

In order for someone to process support requests, they must first be assigned as a support tech. Before someone can be assigned a support tech, they must first be an administrator. If needed, you can create any needed administrators, through the *Other->Manage Administrators* menu of the main Admin Control Panel.

Once you have created all needed administrators, you can assign them as support techs through the *Setup->Manage Support Techs* menu of the Support System. When viewing a support request, the sender of each message is displayed. The Display Name asked in the form, is the name that will be displayed when this tech replies to a support request.

The Administrator field should only be checked if you would like this tech to have access to the Administrator menu of the Support System, allowing them to oversee all support requests flowing through the system. Last, you can check all departments that the tech is a part of. The tech will only see support requests in their assigned departments, and not other departments.

After you have created a support tech, you must go to the *Setup->Privilege* Settings menu, and assign the needed privileges, allowing the support tech to access the needed menus. If the tech is an administrator, then make sure they have access to both, the Request and Administrator menus, including all actions in both. Otherwise, the tech only needs access to the Requests menu.

2.5 Create Categories

If wanted, you can also create categories for support requests. Then when someone submits a support request, they can also select which category the request pertains to. Every category can be assigned to a different department, helping ensure all support requests get to the correct people. You can create categories through the *Setup->Category Settings* menu.

When creating a category, you are asked for a category name, and department. If you select a department, only support techs assigned to this department will see new support requests assigned to this category. For example, you can create a Billing category, which is assigned to the Billing Department. Then, only the Billing Department will see new requests submitted under the Billing category. Please note, this is an optional feature, and you do not need to create any categories.

2.6 Create Pre-Written Responses

The Support System also supports pre-written responses, saving your techs from manually typing out the same responses, over and over. You can create all wanted pre-written responses through the *Setup->Pre-Written Responses* menu. If wanted, you can assign a department to each response. By doing this, only support techs assigned to that department will be able to see / use the response. The message name is the name the support techs will see, when adding a response, and the message contents is what will be added as a reply to the support request.

2.7 Notification Settings

Next, you need to setup all notifications settings, which send out e-mail messages when new support requests are submitted and replied to. This can be done through the *Setup->Notification Settings* menu, and is basically the exact same as creating notifications through the main menu of the Admin Control Panel. By default, a set of notifications has already been uploaded, giving you an idea of what is recommended.

2.8 Create HTML Links

Last, you need to add all needed HTML links into your web pages. First, to allow members to submit support requests through your public web site (ie. member's self replicating web sites), simply link to the new contact.cgi script on your server, which will be located at:

http://www.domain.com/cgi-bin/xflow/modules/support/bin/contact.cgi

Of course, replace domain.com with your actual domain name. If wanted, you may also move the contact.cgi script to another location on your server, and it will still work correctly. When someone visits the URL, an HTML form will be displayed, allowing them to submit their support request. Full information on how to modify the HTML templates, can be found at *Chapter 5. HTML Templates*.

2.8.1 Member's Only Area

Allow your members to submit a support request by adding the following link to your Member's Only Area:

index.cgi?~authtext~&module=support&action=submit_request

Allow members to view and manage all open support requests on their account, by adding the following link to your Member's Only Area:

index.cgi?~authtext~&module=support&action=view_open

Allow members to view all support requests, including previously submitted requests that are now closed, by adding the following link to your Member's Only Area:

index.cgi?~authtext~&module=support&action=view_all

2.8.2 Customer Area (Shopping Cart)

This section only applies if you have the Shopping Cart module installed, and would like to allow customer's to submit support requests through the Customer Area. You can allow new support requests to be submitted by adding the following link into your Customer Area:

index.cgi?~authtext~&action=support_submit

Allow customers to view and manage all open support requests on their account, by adding the following link to your Customer's Area:

index.cgi?~authtext~&action=support_view_open

Allow customers to view all support requests, including previously submitted requests that are now closed, by adding the following link to your Customer Area:

index.cgi?~authtext~&action=support_view_all

3.) Processing Support Requests

This chapter explains how to process support requests. Everything from how the support requests are handled, viewed, moved, and so on are explained in this chapter.

3.1 Open Support Requests

All open support requests can be processed through the *Requests->Open Support Requests* menu. This page contains two or three sections, depending on whether or not you have the Shopping Cart module installed. The first section is titled Public Requests, and contains all support requests submitted from your public web site (ie. member's self replicating web sites). The second section titled Member Requests, contains all support requests submitted from the Member's Only Area. The third section titled Customer Requests, is only present if you have the Shopping Cart module installed, and contains all support requests submitted from the Customer Area.

Each section contains two tables. The bottom table showing all support requests in the general pool, and the top table showing all support requests in your pool. When a support request is submitted, it is first placed in the general pool, where all support techs can see it. Once a support tech views a support request, it is automatically moved from the general pool, over to the tech's pool. This means, other techs will no longer be able to view that support request in the list, and instead, it will only appear in the assigned tech's pool. This helps ensure all support requests are handled in a personalized manner, by one tech, instead of multiple techs.

Each support request has either a red or yellow folder beside it. The red folder means there is a new message, which has not yet been read, in the support request. Once you view the support request, the folder will change to yellow, meaning the full support request has been read.

3.2 Viewing Support Requests

You can view a support request, by clicking on the Request ID link of any request listed in the *Requests->Open Support Requests* menu.

3.2.1 Request Information

This section simply shows information on the support request, such as status, subject, category, date opened, and contact information. This section is solely for reference purposes.

3.2.2 Request Contents

This section contains the contents of the support request, which is broken up in a message board type format. The table contains two columns, one showing who submitted the message, and the date / time the message was submitted. The other column shows the exact contents of the message.

3.2.3 Reply to Request

You can reply to the support request through this section. Simply enter the contents of your reply in the provided text box, and click on the *Reply to Request* submit button. There is a checkbox, asking if you would like to mark the support request as pending. If checked, when you submit the reply, the support request will disappear from your list of open requests. Once the member / customer replies to the support request, it will automatically reappear in your list of open support requests. This allows for greater efficiency, because the only open requests you will ever see are those that still require processing.

You may also add a pre-written response through this section. Simply select the wanted response from the list, and click on the *Add Pre-Written Response* submit button. The page will reload, and the message contents box will then contain the response.

3.2.4 Move Request

Alternatively, you can also move the support request through this section. Moving the request to the general pool, will take it out of your pool, and place it back in the general pool, allowing all techs to view the request, instead of only you. This allows another tech to pick up the support request for processing.

You can also move the support request to another department, which will place it in that department's general pool, allowing all techs assigned to that department to view it. Last, you can move the request to a specific tech, which will place it directly into that tech's pool.

3.3 Create Support Request

You can open a new support request through the *Requests->Create Support Request* menu. First, you need to select whether it is a public, member or customer request, and then fill in the appropriate contact information. Last, simply enter the contents of the support request, and submit the form. The support request will be opened on the needed account, and placed directly in your pool. However, the support request will be marked as pending, and will not appear in your list of open support requests, until the member / customer has replied.

3.4 View Specific Request

You can view a specific support request through the *Requests->View Request* menu. Simply specify the ID# of the support request you would like to view, and submit the form. All support techs can view all support requests, regardless of the department the request is assigned to.

3.5 View Account

You can view a list of all support requests submitted on a specific member or customer account, through the *Request->View Account* menu. Simply specify the member / customer you would like to view, and a list of all support requests on their account will be displayed.

3.6 Login / Logout

Techs can login and logout of the support system through the *Requests->Login / Logout* menu. E-mail notifications of new support requests will only be sent to techs who are logged in. This helps ensure techs do not receive a large number of e-mail notifications, when they're not even working, and while someone else is handling the support requests. If you only have one tech per department, then you will most likely want the logged constantly logged in.

The times each techs logs in and out are logged, and can be viewed at a later date through the Administrator menu.

4.) Administrative Features

There are several administrative features available in the Support System, allowing you to oversee all support requests flowing through your system, and keep track of all support techs. The only people allowed to access the Administrative menu are those who were assigned as administrators, when you created techs through the *Setup->Manage Support Techs* menu.

4.1 View New Activity

Through the *Administrator->View New Activity* menu, you can view all new support requests, including replies, which have been submitted in your assigned departments. This menu simply shows a list of all support requests, which you can view by clicking on the needed Request ID link. You can delete any of the lists support requests from your list by checking the wanted ones, and clicking on the *Delete Checked Requests* submit button. By deleting support requests, you are only deleting them from your list, and not the database.

Each administrator receives their own list of support requests. When you delete support requests from your list, they will still show up on all other needed administrator's lists, until they delete them aswell.

4.2 View Support Tech

You can keep track of all techs through the *Administrator->View Support Tech* menu. First, a list of techs is displayed. You can view details on any techs by clicking on the needed View Details link. You can view all open support requests currently assigned to tech, the login / logout times, and so on.

5.) HTML Templates

This chapter gives a description of all HTML templates used by the Support System. If you do not already know the basics of how xFlow uses HTML templates, such as the special HTML tags used, please consult the Developer's Manual which can be found on the online documentation site at http://docs.envex.com/

5.1 HTML Template Descriptions

The below tables list the location and description of every HTML template used by the Support System module.

Directory: */cgi-bin/xflow/modules/support/htmlt/members_only*

HTML Template	Description
reply_thankyou.htmlt	Displayed after a member submits a reply to a support request through the Member's Only Area.
submit_request.htmlt	The HTML form allowing members to submit a new support request.
submit_request_thankyou.htmlt	Displayed after a member submits a new support request through the *submit_request.htmlt* template.
view_all.htmlt	Displayed when a member views a list of all support requests on their account, included closed requests.
view_open.htmlt	Displayed when a member views a list of all open support requests currently on their account.
view_request.htmlt	Displayed when a member views the contents of any of their support requests. This template contains the contents of the support request, etc.

Directory: */cgi-bin/xflow/modules/support/htmlt/public*

HTML Template	Description
contact.htmlt	The HTML form allowing the people to submit a new support request from the public web site.
contact_thankyou.htmlt	Displayed after someone submits a new support request through the *contact.htmlt* template.
reply_thankyou.htmlt	Displayed after someone submits a reply to a support request, which was submitted from the public web site.
view.htmlt	Displayed when someone first wants to view / manage their support request. This form asks for the e-mail address used for the support request, to help improve security.
view2.htmlt	Displayed when a someone views the contents of any of their support requests. This template contains the

	contents of the support request, etc.

5.2 Submit Support Request Form

For different reasons, you may want to create the HTML form to submit a support request yourself. This section explains exactly how to create the HTML form from scratch.

First, you need a *<FORM>* tag. If this form is being used on your public web site, the form tag must point to the contact.cgi script on your server, and should look like:

```
        <FORM ACTION=”http://www.domain.com/cgi-
bin/xflow/modules/support/bin/contact.cgi” METHOD=”POST”>
```

If this form is being used inside of the Member’s Only Area, you need the following form tag:

```
        <FORM ACTION=”index.cgi?~authtext~&module=support&action=submit_request”
METHOD=”POST”>
```

Otherwise, if this form is being used inside the Customer Area of the Shopping Cart module, you need the following form tag:

```
        <FORM ACTION=”index.cgi?~authtext~&action=support_submit” METHOD=”POST”>
```

If this form is being used on the public web site, you must add form fields, **from_name**, **from_email**, and **phone**, which represent the person’s full name, e-mail address and phone number. The **phone** field is optional, but the other two are required. The form fields should look something like:

```
        <INPUT TYPE=”text” NAME=”from_name” SIZE=25>
        <INPUT TYPE=”text” NAME=”from_email” SIZE=25>
```

Next, if you’re using categories, you need to add the **category** field to your form. The value of this form field must be the ID# of an existing category in your database. You can view all categories, including their ID#, through the *Setup->Category Settings* menu. Typically, this field is used in a select list, but not required. For example:

```
        <SELECT NAME=”category”>
                <OPTION VALUE=”3”>Pre-Sales Question
                <OPTION VALUE=”4”>Billing
                <OPTION VALUE=”5”>Technical Support
        </SELECT>
```

If you’re using the priority feature, you must add the **priority** field to your form. There are only four possible values for this field, and typically, it’s placed in a select list, but not required. For example:

```
        <SELECT NAME=”priority”>
                <OPTION VALUE=”1”>Low
                <OPTION VALUE=”2”>Normal
                <OPTION VALUE=”3”>Important
                <OPTION VALUE=”4”>Emergency
        </SELECT>
```

Next, you need to add the **subject** field, allowing people to enter a one-line subject of the support request. This is normally a text field, and should look something like:

```
        <INPUT TYPE=”text” NAME=”subject” SIZE=30>
```

Now you just need to add a **contents** field to the form, allowing people to enter the actual contents of the support request. This is basically always a text area field, and should look something like:

```
<TEXTAREA NAME=”contents” ROWS=10 COLS=40 WRAP=”virtual”></TEXTAREA>
```

Last, you simply need to add a submit button, which should look something like:

```
<INPUT TYPE=”submit” VALUE=”Submit Request”>
```

If you’ve successfully completed all above steps, you’re new HTML form should now be ready. Simply upload the form to the appropriate location on your web server, and it’s ready to use.