



Helpdesk Setup Guide



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How do I receive tickets?

Product Trainings

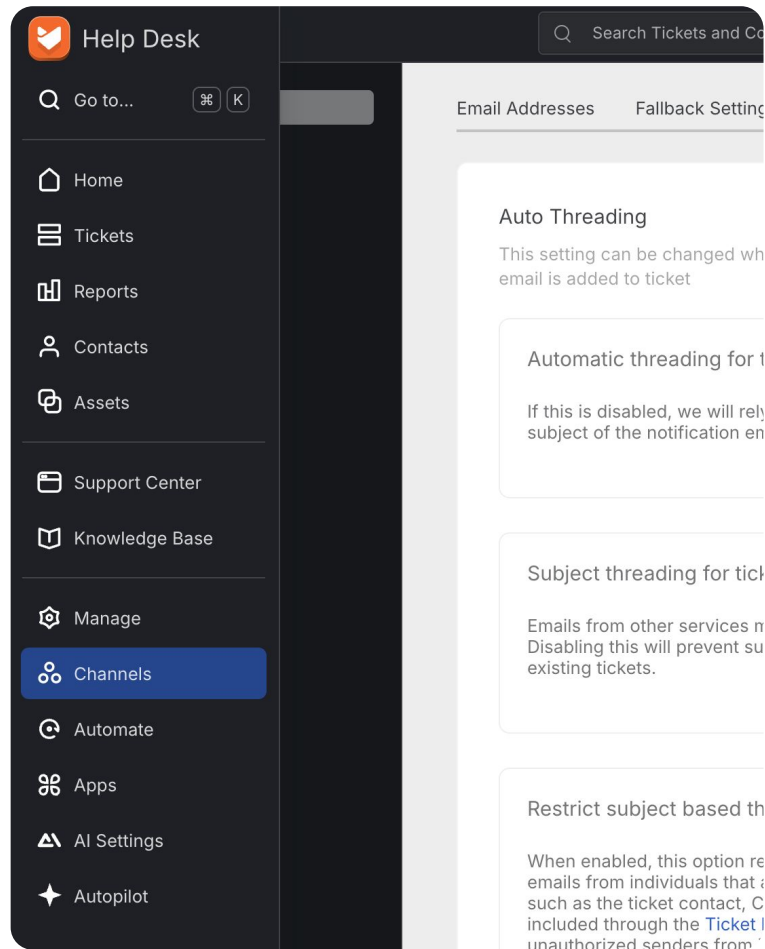
From the Main Menu, go to the “Channels” page to select the different ways you want your contacts to raise tickets. Some of the most popular channels are:

Email:

Create tickets from emails .i.e.
support@myorganization.com.

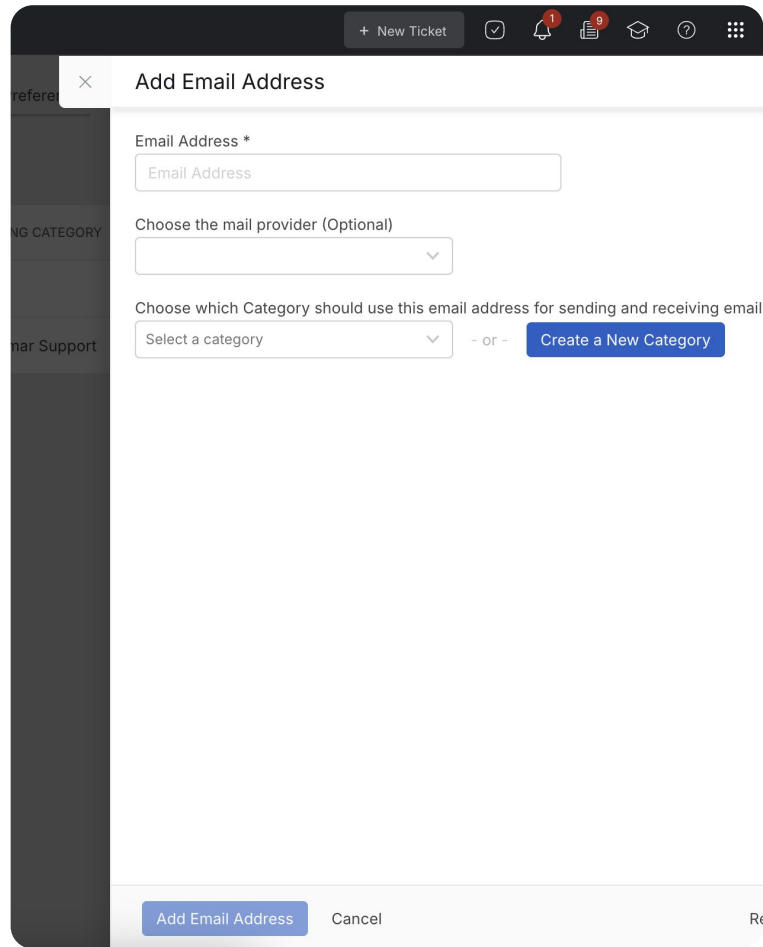
Support Center:

Provide a dedicated portal where your contacts can raise tickets via web-form.



How to setup email as a channel

- Click **+** next to the Email channel and enter the Email address.
- Choose which **category** should receive these Emails as tickets.
- Setup **auto-forwarding** from your mailbox to HappyFox by following the instructions provided.



The screenshot shows a dark-themed application interface with a top navigation bar containing a '+ New Ticket' button and several notification icons. A modal dialog titled 'Add Email Address' is open, featuring a close button (X) in the top left. The dialog contains the following fields and options:

- Email Address ***: A text input field with the placeholder 'Email Address'.
- Choose the mail provider (Optional)**: A dropdown menu.
- Choose which Category should use this email address for sending and receiving email**: A section containing a dropdown menu labeled 'Select a category' and a blue button labeled 'Create a New Category'.

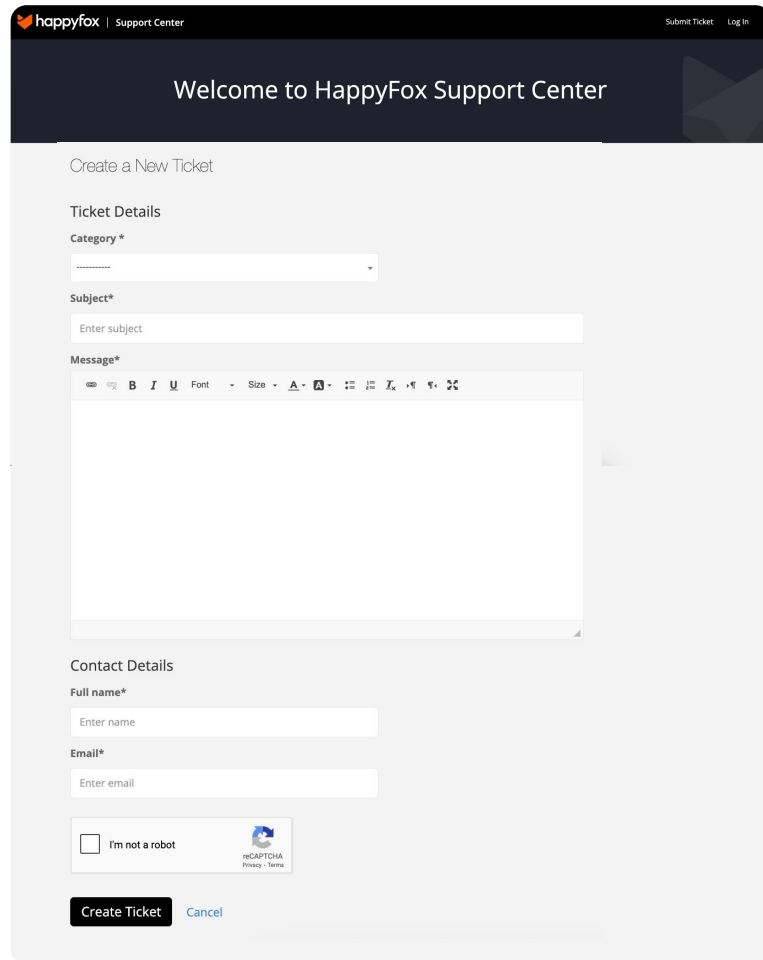
At the bottom of the dialog, there are two buttons: 'Add Email Address' (blue) and 'Cancel' (gray). The background of the application shows a sidebar with categories like 'Support' and 'Referrals'.



Receive tickets via Support Center

- Route your contacts to **`https:// <subdomain> .happyfox.com/*`**
- Contacts can click on **New Ticket** to submit a ticket from the web form.
- Contacts can register and log in to your customer portal to track their tickets.

* For better branding experience, your HappyFox URL can be customized with your own.



The screenshot shows the 'Create a New Ticket' page in the HappyFox Support Center. The page has a dark header with the HappyFox logo, 'Support Center', and links for 'Submit Ticket' and 'Log In'. Below the header, a dark banner reads 'Welcome to HappyFox Support Center'. The main form area is light gray and contains the following sections:

- Create a New Ticket**: The main heading for the form.
- Ticket Details**:
 - Category ***: A dropdown menu.
 - Subject ***: A text input field with the placeholder 'Enter subject'.
 - Message ***: A rich text editor with a toolbar (bold, italic, underline, font color, background color, bulleted list, numbered list, link, unlink, undo, redo) and a large text area with the placeholder 'Enter your message'.
- Contact Details**:
 - Full name ***: A text input field with the placeholder 'Enter name'.
 - Email ***: A text input field with the placeholder 'Enter email'.
 - Verification**: A checkbox labeled 'I'm not a robot' next to a reCAPTCHA widget.
- Buttons**: At the bottom, there is a black 'Create Ticket' button and a blue 'Cancel' link.



What are Categories

Categories are a high level classification that allows to separate and organized different type of tickets.

Below are a few sample lists for ticket categories. Please keep in mind they can vary based on your team's use case. Feel free to build your own!

IT	Customer Service	Human Resources	Software Support	Marketing	Accounting
App Support	Sales	New Hires	Support I	Website Changes	Account Receivables
Network	Product Support	Terminations	Support II	Blog Updates	Accounts Payables
Hardware	Returns	Benefits	Training	Social Media	Statement Updates
New Hire Onboarding	Shipping	Payroll	Sales	Print Media Request	Purchase Orders
Access Change	Public Relations	Training	Billing	Press Releases	New Vendor Set Up

Note: You can build "sub-categories" with "custom fields".



How to customize your Support Center

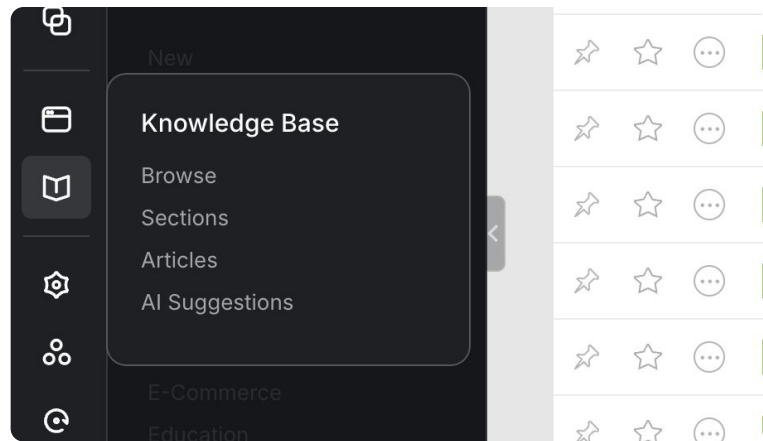
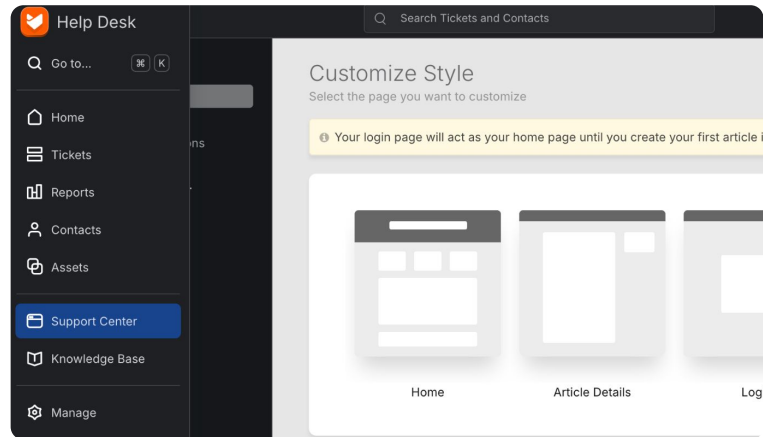
The Support Center is a self-service portal where your contacts can read knowledge base articles, raise new tickets via web-forms and can log in to review previously submitted tickets.

Support Center:

Use to customize the feel-and-look of every page of your self-service portal.

Knowledge Bases:

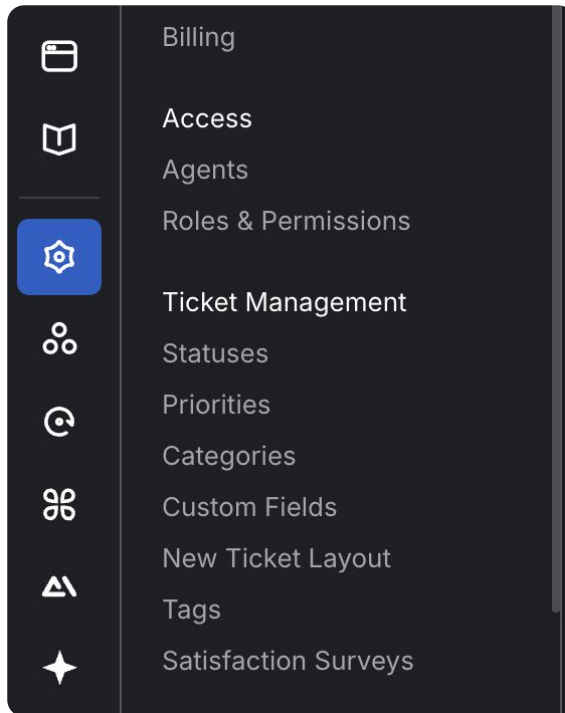
Use to add content for your contacts self-service portal.



How to further organize your helpdesk

Structure your helpdesk to match your team requirements.

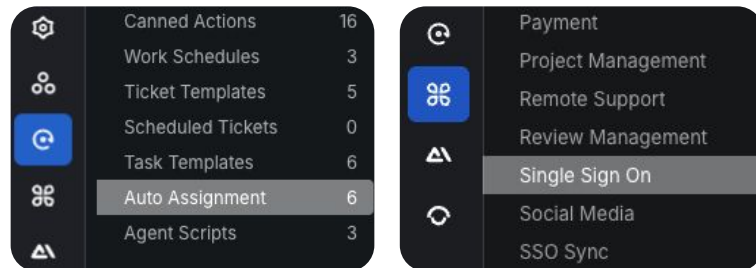
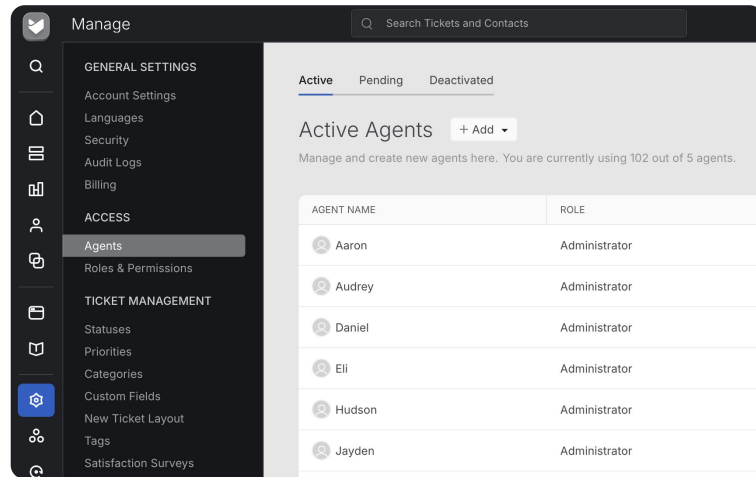
- **Categories:**
Use to define high level type of tickets
(see samples on the next page).
- **Custom Fields:**
Use to add further details to your ticket forms.
- **Statuses:**
Use to keep track of the ticket progression until it's completed.
- **Priorities:**
Use to indicate the level of importance on the ticket.



How to bring your team on-board?

Navigate to the “**Agents**” page to invite your team members. Also, consider using the following features to enhance their experience:

- **Roles & Permissions:** Define the appropriate HappyFox user levels for your team.
- **Apps (Single-Sign-On):** Use your favorite SSO provider to enhance your team’s log-in security.
- **Auto Assignment:** Distribute tickets automatically.



How to find help in HappyFox?

There are various ways to find help and learn more about HappyFox:



Visit the **HappyFox University** module to watch our library of video tutorials.



Go to our Support Center (<https://support.happyfox.com>) where you can articles about anything HappyFox related and raise tickets if you cannot find the answer.



Interact with our **AI Chatbot** (24/7) & Live Chat with a Product Specialist.



Submit a ticket via email to **support@happyfox.com**



Call our Support Line:
949-535-2220

Also, during your trial period you have been assigned to an account manager. He/she will be happy to help as well!





Thank You