



**GFI** HelpDesk

GFI HELPDESK ADMIN GUIDE



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# 1 Introduction

GFI HelpDesk is an enterprise-grade on-premise service desk software built on the powerful Kayako helpdesk software. GFI HelpDesk can be hosted in the customer's own infrastructure, on-premise, or in any public cloud infrastructure that supports MySQL/MariaDB and PHP 7+.

GFI HelpDesk was built to enable flexibility and increase productivity. Various tools and workflows are available to automate follow-ups and reminders for support agents. Agents can collaborate on tickets using notes and have all customer's information that is required to resolve a ticket at their fingertips. Predefined responses can speed-up reply times to increase agents' productivity.

GFI HelpDesk is easy to install on a variety of platforms and systems. It can also be branded to the requirements based on the desired look and feel as well as very easy to use by support agents with little training required.

GFI HelpDesk also lets you keep customers informed with news, knowledge-based articles as well as instinct answers to queries enabling fewer support tickets for easy and known answers.

GFI HelpDesk provides a powerful query engine KQL that can be used to access data and measure customer satisfaction, track team performance, and use all the data to understand your customer support experience. Various pre-built reports are available to measure the progress with one click. Additional reports can be built using KQL.

## 2 Deploying

The following topics provide information on how to successfully deploy a fully functional instance of GFI HelpDesk and how to upgrade existing installations.

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### 2.1 Installation

Get help with installing, running, and upgrading GFI HelpDesk on your own server.

Topics in this section:

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## 2.1.1 System requirements for GFI HelpDesk

### » Hardware:

- 2 GB RAM
- 20 GB Hard disk Space
- 2 GHz CPU

### » OS:

- Windows
- Linux (RedHat, CentOS, Ubuntu, Debian)

### » PHP 7.3 ONLY

### » MySQL 5.6.31 or MariaDB 10+ (recommended)

#### Installing MySQL or MariaDB (recommended)

**Windows** - <https://mariadb.com/kb/en/installing-mariadb-msi-packages-on-windows/>

**CentOS/RedHat** - <https://mariadb.com/kb/en/yum/#installing-mariadb-server-with-yum>

**Debian/Ubuntu** - <https://mariadb.com/kb/en/installing-mariadb-deb-files/#installing-mariadb-packages-with-apt>

For further details, see For more information, refer to [Pre-installation server configuration](#) (page 8)..

#### NOTE:

For the Linux operating system, SELinux must be disabled or set to permissive mode.

#### NOTES:

- » If you are running GFI HelpDesk on a Linux server with SELinux, configure it to permit GFI HelpDesk activities.
- » If you are not familiar with SELinux, we recommend you to disable it, as GFI HelpDesk does not function if it is mis-configured.

## 2.1.2 Pre-installation server configuration

This topic describes the required web server configuration to install GFI HelpDesk.

### Recommended PHP/MySQL Parameters

#### PHP

These settings are done in the PHP configuration file php.ini of the server on which you are installing the helpdesk:

Configuration Setting	Value
max_execution_time	600
max_input_time	600

Configuration Setting	Value
memory_limit	512M
<p><b>NOTE:</b> This varies if you plan on using the GFI HelpDesk import tool, or if the web server is shared, a higher limit is required.</p>	
output_buffering	4096
file_uploads	On
upload_max_filesize	20M
post_max_size	20M
max_file_uploads	20
open_basedir	Off
always_populate_raw_post_data	-1

## Apache

If you have ModSecurity installed on your Apache web server, you must either disable it or whitelist your GFI HelpDesk files (so they are exempt from all mod\_security rules).

## MySQL

» `sql-mode` : Set to **not strict**.

### Important:

Refer to [Disabling MySQL strict mode on the server](#) to know how to disable MySQL Strict Mode.

- » `max_allowed_packet`: **64M** (minimum)
- » `connect_timeout`: **300** (minimum)
- » `optimizer_search_depth`: **7** (4 minimum, 17 max)

## PHP Caches and Accelerators

- » GFI HelpDesk accesses many scripts spread across many files for each connection.
- » If you do not have a PHP cache unless your web server is very finely tuned, you find the application to be less responsive.
- » We recommend enabling OpCache, which is readily available with your PHP 7 installation.

## Required PHP Modules

Most of these modules are included by default. However, some are disabled by default, it is important to enable them before beginning with installation:

- » [Multibyte String](#)
- » [OpenSSL](#) (mandatory for PHP 7)
- » [GD](#) with FreeType support
- » [cURL](#)
- » [MySQL](#)

- » MySQLi
- » Mysqlnd (required for PHP 5.x only)
- » PDO
- » PDO\_MYSQL
- » SimpleXML
- » Filter
- » JSON
- » IMAP
- » Sockets
- » XML Parser
- » DOM
- » intl
- » Fileinfo

### 2.1.3 Installing GFI HelpDesk

In this topic, you get a walk through the steps necessary for installing GFI HelpDesk on your own server.

View our how to install video [here](#).

#### **Important:**

Before installing GFI HelpDesk on your server, you'll need to check to make sure your [server environment](#) meets all of the requirements.

### Downloading, unpacking, and uploading the product files

The first part of the installation process is to download the product files, extract them on your local machine, and upload them from there to your server:

1. Download GFI HelpDesk from the following location depending on the required edition:

<b>Case</b>	<a href="http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_case.tar.gz">http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_case.tar.gz</a>
<b>Fusion</b>	<a href="http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_fusion.tar.gz">http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_fusion.tar.gz</a>

2. Click the link to the product and save the file to your machine.
3. Extract the package locally.
4. The extracted folder contains a sub-folder named 'upload', which contains all the files required to install your helpdesk.
5. In the root directory of your web server, create a new folder for your GFI HelpDesk installation to live in and name it, for example, 'support'.
6. Using either the command line or an FTP client of your choice, upload all of the files from the 'upload' folder into your newly created 'support' folder.

**NOTE:**

If you are using an FTP client, make sure it is uploaded using binary mode.

Now that the product files are up on your web server, it's time to do some setup on the backend.

## Creating a MySQL/MariaDB database

Your next step is to create a new MySQL/MariaDB database on your server that GFI HelpDesk can use.

**NOTE:**

You need root-level permissions to set up a new database on your server.

### Using command line

If you are using the command line, you can use the following commands to create the database and user credentials you need.

```
CREATE DATABASE gfihelpdesk;  
USE gfihelpdesk;  
ALTER DATABASE gfihelpdesk DEFAULT CHARACTER SET utf8 COLLATE utf8_unicode_ci;  
GRANT ALL PRIVILEGES ON gfihelpdesk.* TO 'gfihelpdesk_user'@'localhost' IDENTIFIED by 'password_of_your_choice';
```

**Important:**

Enter an actual password in place of 'password\_of\_your\_choice' in the above command.

### Using phpMyAdmin or other graphical server configuration tool

If you are using phpMyAdmin or another graphical server configuration tool, you have to use their create database function to do the following:

1. Create a new database called `gfihelpdesk`, set to use `utf8_unicode_ci` for its table collation.
2. Add a new user to the database called `gfihelpdesk` with a password of your choice.
3. Specify `localhost` when prompted for a hostname
4. Grant all privileges to that user.

With your database ready and waiting, there are a few last configuration steps you have to take.

## Database configuration and license

Before you begin the GFI HelpDesk installation, the database configuration and the license file should be correctly set up.

### Rename 'config.php.new'

To avoid accidental overwriting of `config.php` which is located in `__swift/config/` and contains important data, the default name for the file is `config.php.new`. Rename it to `config.php` before continuing.

### Edit 'config.php'

The 'config.php' file must be manually edited for configuration of the helpdesk's database connection.

The following variables in this file need to be edited:

`$_DB["hostname"]` – Unless you have supplied a different hostname when creating your database, this variable should be set to `localhost`.

`$_DB["username"]` – Unless you have supplied a different user name when creating your database, this variable should be set to `gfihelpdesk_user`.

`$_DB["password"]` – The variable should be set to the password that you supplied when setting up your database user.

`$_DB["name"]` – Unless you have supplied a different user name when creating your database, this variable should be set to `gfihelpdesk_fusion`.

An example of what the database details in your `config.php` file should look like:

```
/** * DATABASE HOSTNAME */
define('DB_HOSTNAME','localhost');

/** * DATABASE USERNAME */
define('DB_USERNAME','gfihelpdesk_user');

/** * DATABASE PASSWORD */
define('DB_PASSWORD','enter password of your choice');

/** * DATABASE NAME */
define('DB_NAME','gfihelpdesk');
```

#### **NOTE:**

The rest of the settings in `config.php` should be left unchanged unless you are very familiar with the system.

After editing, save the file.

### **Upload 'key.php'**

In order to activate the product, [download](#) the `key.php` file corresponding to your registered domain and upload it to the root folder in which the rest of the helpdesk files have been uploaded.

### **Set folder permissions**

GFI HelpDesk needs write permissions, recursively, for five directories:

- » `__swift/*.*`
- » `__swift/cache`
- » `__swift/geoip`
- » `__swift/logs`
- » `__apps`

Now, choose the section below that corresponds to your operating system if you are unfamiliar with changing permissions on directories.

#### **NOTE:**

It is usually possible to change directory permissions using an FTP client, but that is out of the scope of this document. Please consult your FTP client's documentation to learn how to change a directory's permissions using that tool.

Unix-based servers:

On a Unix-based system, the `chmod` command to set permissions to '777' on the above mentioned directories:

From within the `__swift` directory:

```
chmod-Rf 777 files cache geoip logs library
```

From within your GFI HelpDesk root directory (for example, 'support'):

```
chmod-Rf 777 __apps
```

Windows-based servers:

Make below two adjustments if GFI HelpDesk is run on a Windows-based server:

1. In the `php.ini` file, set the `upload_tmp_dir` to `C:\Windows\TEMP`. Open up your `php.ini` file, search for `upload_tmp_dir` and make sure it looks as below:

```
; Temporary directory for HTTP uploaded files (uses system default if not specified).  
upload_tmp_dir = C:\Windows\TEMP
```

2. Set some specific folder permissions for Microsoft's IIS. For the user account of the application pool used for GFI HelpDesk, grant full permissions to the following folders:

- » `files`
- » `cache`
- » `geoip`
- » `logs`
- » `library`
- » `__apps`
- » `C:\Windows\TEMP`

#### **NOTE:**

It is recommended to keep the Application Pool Identity as the Application Pool itself, and add that identity to the list of authorized user accounts with full control permissions for the above folders.

For more information about Application Pool Identities, refer to the IIS Documentation. Otherwise, you would usually need to add the 'IUSR' user account to said list. For help with this, also refer to the IIS documentation.

## **Installing GFI HelpDesk**

Now that your server is prepped, you're ready to start the installation itself:

1. Open up your browser and go to your GFI HelpDesk directory `/checklist.php`.

#### **Important:**

For example, <https://www.yourdomain.com/support/checklist.php>.

2. Ensure that there are no errors / warnings prior to proceeding with the installation (by clicking **Install GFI HelpDesk**).

3. Click **Setup** to begin the installation process.

4. Once you agree to the license terms, and then the setup utility checks to make sure your server meets all the requirements. When it is done, click **Next**.

5. The next step is to create credentials for the default administrator account and supply some important details for the helpdesk. The Product URL should be the publicly accessible URL of your helpdesk. For example - `https://yourdomain.com/support/`.

6. Once the details are filled, click **Start Setup** to begin the automated setup procedure.

**NOTE:**

The automated portion of the setup script may take quite some time. Do not interrupt it for any reason else the installation can be corrupted and you have to start over again.

Once setup has completed, a success screen is displayed, and you only have one more step before you are ready to start using GFI HelpDesk!

**IMPORTANT: Removing the /setup directory**

Once the setup process has completed successfully, remove the `setup` directory from your server, as a security measure. You may receive warnings if you do not delete it.

This completes installing GFI HelpDesk!

### 2.1.4 Downloading the license file for GFI HelpDesk

`key.php` is the license file for GFI HelpDesk.

If you are on a GFI HelpDesk, you may have to download and install the license (`key.php`) file corresponding to your registered domain from <https://accounts.gfi.com/> and upload it to the root folder in which the rest of the helpdesk files have been uploaded.

This topic provides information on downloading the `key.php` file for the GFI HelpDesk account.

If you are on the GFI HelpDesk Download version and have renewed your subscription, or have made changes to your account such as an increase/decrease of seat count and domain change, you must update your existing `key.php` file with a new one.

You can download the `key.php` file by selecting the product GFI HelpDesk from <https://accounts.gfi.com/> and then clicking **License** file section under **Overview** tab.

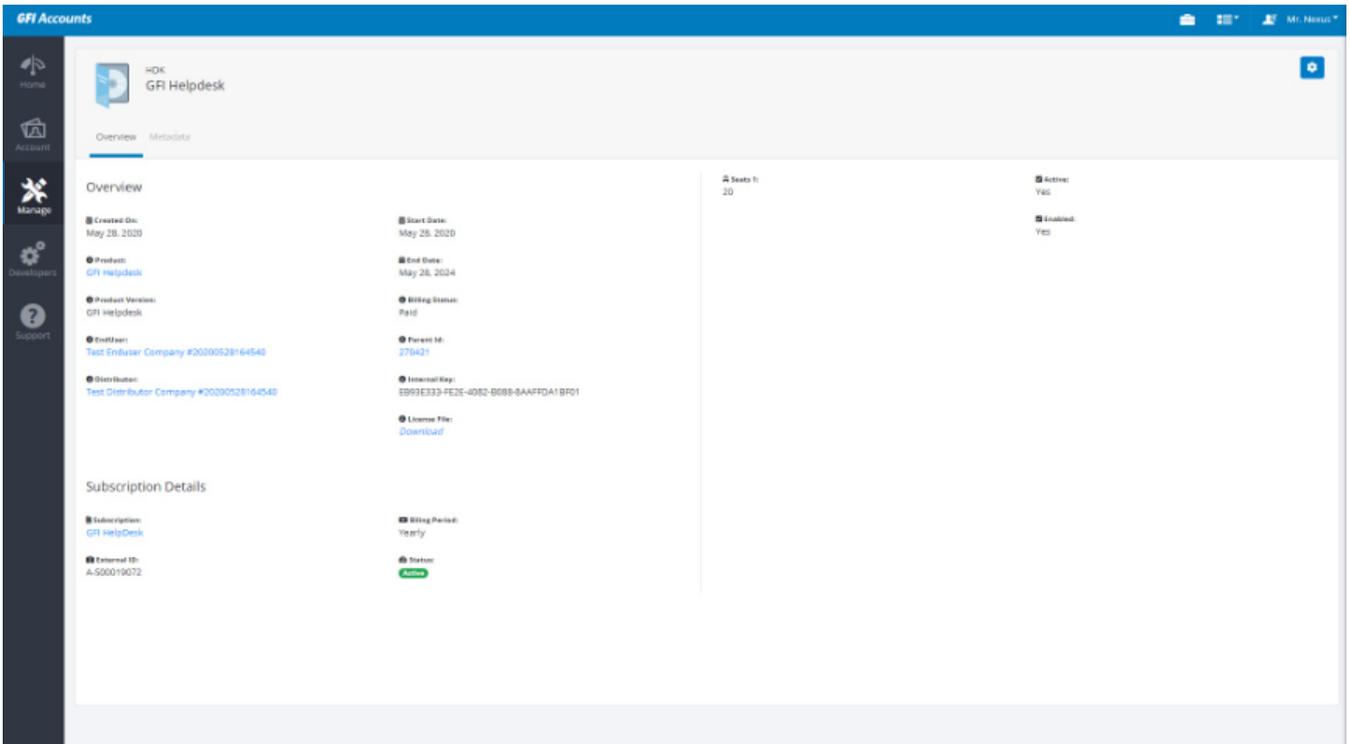
**NOTE:**

Every time you replace the `key.php` file, rebuild the cache to bring those changes into effect using the following link:

`https://[yourhelpdesk URL]/staff/index.php?/Core/Default/RebuildCache`

Steps to download the `key.php` file:

1. Go to <https://accounts.gfi.com/> and select product as GFI HelpDesk.
2. Go to **Overview >License** and download the license.

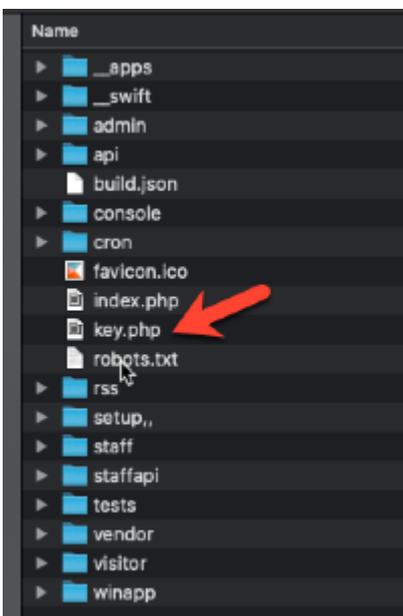


Screenshot 1: Download license

After downloading the key.php file, upload it to the root folder (replacing the old file) in which the rest of the helpdesk files have been uploaded.

#### NOTE:

The key.php file is present under the document root of your GFI HelpDesk installation.



Screenshot 2: key.php file location

Take a backup of the old key.php file before replacing it, in case something goes wrong with the new key file.

## 2.1.5 Manually Scheduling a Server Task/Cron Job for GFI HelpDesk Download

Many GFI HelpDesk's functionality relies on a schedule of internal tasks that do things like fetch emails, perform system cleanups, execute ticket follow-ups, etc. However, this internal system does not run continuously. It is only triggered when the Staff control panel is accessed.

In a busy helpdesk, that is no problem. However, if your helpdesk activity is pretty light, then you might miss out on emails, follow-ups, or other time-sensitive activities.

To keep your GFI HelpDesk function at a peak level, you should create a scheduled task (Windows) or cron job (Linux/Unix) that loads the `/cron/index.php` every 10 minutes, to make sure everything keeps ticking along.

To make sure your GFI HelpDesk runs more-or-less continuously, schedule a task or cron job on the server you use to host GFI HelpDesk.

The specific process for creating a task/job on your server varies significantly, depending on the platform and configuration tool you use.

Below are the basics for Windows and Linux, followed by in-depth documentation links for a variety of standard configuration tools.

### For Windows Servers:

**NOTE:**

To create a scheduled task, you need administrative privileges and wget installed.

- » If you are using the command line, create a new task with the `schtasks` command:
- » If you are using the Task Scheduler application, follow the prompts to build a task that fires every 10 minutes and uses wget to load the `https://<YOURDOMAIN>.gfi.com/cron/index.php?` page.
- » You can read more about creating scheduled tasks in the Windows server documentation: [Schedule a Task](#).

### For Linux/Unix Servers:

**NOTE:**

To create a cron job, you require root-level permissions and wget installed.

- » If you are using the command line, add a new line to your crontab file that reads:

```
*/10 * * * * wget -O /dev/null --no-check-certificate
https://<YOURDOMAIN>.g-
fi.com/cron/index.php?/Parser/ParserMinute/POP3IMAP
```

**NOTE:**

Make sure you update the YOURDOMAIN in the GFI HelpDesk URL.

- » You can read more about cron jobs in the Ubuntu community documentation: [CronHowto](#).

### Other Server Configuration Tools

Many server configuration dashboards let you create server tasks with a GUI tool. Below are the links to the documentation for a handful of common tools:

- » [cPanel Version 84 Docs - Cron Jobs](#)
- » [Plesk Documentation and Help Portal](#)

## 2.1.6 Disabling SELinux

**SELinux (Security-Enhanced Linux )** is an advanced security mechanism built into modern Linux distributives. When enabled, it can prevent GFI HelpDesk setup scripts from installing the Help Desk, can block errors from appearing on a browser and can cause other issues, including different permissions errors and warnings like:

```
PHP Warning:fopen(./__swift/logs/log.error_xxx.txt):failed to open stream:
Permission denied in /var/www/html/GFI HelpDesk/__
swift/library/Log/class.SWIFT_Log.php on line 409
```

or

```
PHP Fatal error: Uncaught SWIFT_Exception: Invalid data provided in
/var/www/html/GFI HelpDesk/__swift/library/Log/class.SWIFT_Log.php:539
```

Implement the steps below to find the current status of SELinux and disable it, if needed:

1. To get the current state of SELinux run the following command in the command line on the server:

```
getenforce
```

If you see **Enforcing** or **Permissive**, it means SELinux is up and running. The **permissive** mode does not block anything. However, it logs all security policy violations. In case there are no plans to have SELinux enabled on the server there is no need to keep it in the Permissive mode.

2. To disable **SELinux** edit the file `/etc/selinux/config`:

Find the line starting with `SELINUX=` and set the value to disabled so it should look like:

```
SELINUX=disabled
```

3. Save the file and reboot the server to apply the changes.

### Confirmation

Executing `getenforce` command in the command line returns disabled as the output.

## 2.2 Upgrade

It is recommended that you run the latest GFI HelpDesk Download release. Before upgrading your GFI HelpDesk , make sure your server environment is up-to-date and create a back-up copy of your database.

For further details, see [Server-configuration-requirements.htm](#).

---

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---

### 2.2.1 Upgrading your GFI HelpDesk

Follow the instructions in this topic carefully as a failure in doing so may result in errors after the upgrade such as "Uncaught exception" or "AutoExecute Query."

This topic goes through the procedure for upgrading your GFI HelpDesk to the latest version which is free if you have an active account.

In this topic 'downgrading' (that is, switching from Fusion to Case or Engage) is also covered, as the processes are almost identical.

**Note:**

Though the process is referred to as 'upgrading' throughout this topic, it applies to both upgrades and downgrades.

A clean install is always recommended which means you need to delete your old directory before copying the new files in.

---

---

## Upgrading GFI HelpDesk

This section describes how to upgrade a GFI HelpDesk installation to the latest version while retaining all settings.

This upgrade process takes several hours, depending on the size of your database, during which your support Center cannot be accessed by your customers.

### Important notes when upgrading

- » Check that your license is current, which should include both your product license and your support subscription. To check the status of your license and subscription login to <https://accounts.gfi.com> then navigate to GFI HelpDesk and check your expiry date.
- » Make sure you have admin privileges for not only your GFI HelpDesk instance but also the server you use to host it.
- » Ensure that your server environment is up-to-date with GFI HelpDesk's [requirements](#).
- » Create a folder on your computer to save a copy of your data (for example, `gfihelpdesk_backup`). You can name this folder to whatever you like, but it is referred to as *gfihelpdesk\_backup* throughout these docs.

### Upgrade procedure

For complete upgrade procedure, see [Upgrade steps](#).

### Steps to upgrade

The upgrade process consists of the following steps:

#### Step 1: Disabling Your Helpdesk

##### Take GFI HelpDesk Offline

To prevent new data from being generated while you are upgrading, disable your helpdesk. You can create a temporary page to inform visitors.

To set up your placeholder page:

1. Create a simple `.html` page called `index.html` with a message explaining that your support site is temporarily unavailable.
2. Save your customized `index.html` file, and any image files it uses on your local machine.
3. Log onto your server and navigate to your GFI HelpDesk root directory.

4. Upload your `index.html` file + images.
5. In the same folder, find the `index.php` file, which is your current support site homepage.
6. Rename `index.php` to `index_down.php`. This ensures that no one can access your helpdesk while you are updating.
7. Open up a browser window and navigate to your support site. The new `index.html` page is now seen.

### Renaming the cron Folder

It is also recommend to rename your cron folder temporarily so that if you have a manual cron job set up, it does not ping your helpdesk during the upgrade.

To change the name of your cron folder:

1. Navigate to your GFI HelpDesk root directory, and find a folder called `cron`.
2. Rename this folder to `cron_disabled`. This prevents any manual cron jobs you have set up from firing while you run your backups.

### Disable Your Email Queues

Disable your email queues, so you do not miss any incoming requests while GFI HelpDesk is offline.

1. Log into the GFI HelpDesk admin control panel.
2. On the menu sidebar, click **Email Parser** followed by **Email Queues**.  
For queues using POP3 or IMAP:
  - a. Click the email address on the list.
  - b. Under 'Email Queue Settings', next to **Email Queue is Enabled** select 'No'.
  - c. Click **Update**.
  - d. Any emails sent to these email addresses now simply accumulates in the email inboxes while GFI HelpDesk is offline.

For email queues using the Pipe method:

- a. Log into the mail server for the address being used to forward emails and disable mail forwarding while GFI HelpDesk is offline.
- b. You can then follow the instructions above to disable the queue within GFI HelpDesk.

## Step 2: Make a Complete Backup of Your GFI HelpDesk Files

### Back up your templates

Next, yCreate a backup of any templates you've modified in GFI HelpDesk so you can import them into your updated helpdesk.

To back up your templates:

1. Go back to the GFI HelpDesk administrative control panel.
2. On the menu sidebar, go to **Templates > Import/Export**.
3. Next to **Export Type**, make sure **Export all templates** is selected.
4. Click **Export XML** and save your backup to your '[GFI HelpDesk\_backup]' folder.

Back up any language support files that is modified.

**NOTE:**

If you haven't customized any language packs, you can skip this section.

**To create backups of your language packs:**

1. Go back to the GFI HelpDesk administrative control panel.
2. On the menu sidebar, go to **Languages > Import/Export**.
3. Next to **Language to Export**, select a language you have made modifications to, and click the Export XML button in the top menu.
4. Save the XML file to your '[GFI HelpDesk\_backup]' folder.
5. If you've modified other language packs, repeat the same procedure for each additional language.

**Back up your file attachments and GeolP folder**

Next, make a copy of two folders that store important information for your helpdesk:

1. Using a file manager or the command line, log into your server and navigate to the GFI HelpDesk root directory.
2. Open the '\_\_\_swift' directory, and find the 'files' and the 'geolp' directories.
3. Make a compressed archive of each of them and name them 'files\_backup' and 'geolp\_backup' respectively.
4. Save the archives to your '[GFI HelpDesk\_backup]' folder.

**Make a complete database backup**

You can make a complete backup of your GFI HelpDesk database, just in case something goes wrong during the upgrade process.

1. We recommend you use the command line to make your database backup, so pull up a terminal window and log into your server.
2. Run the following command, filling in your details for each [placeholder], to save a local backup of your GFI HelpDesk database:

» On Windows Environments:

```
mysqldump --databases [your database name] --user=root --password=[your password] > [filepath for your [GFI HelpDesk_backup] directory] \dump.sql
```

**NOTE:**

If you try to run this command and it tells you the program cannot be found, you'll need to navigate to the directory where the MySQL dump tool has been installed and run it again, usually 'C:\Program Files\MySQL\MySQL Server 5.5\bin\mysqldump'.

» On Linux Environments:

```
mysqldump -u [your username] -p[your password] [your database name] > [filepath for your [GFI HelpDesk_backup] directory] /dump.sql
```

**NOTE:**

If you try to run this command and it tells you the program cannot be found, you'll need to navigate to the directory where the MySQL dump tool has been installed and run it again. You can get there by typing 'which mysqldump' and then navigating to the path the command returns.

3. Go to the target directory you specified, and check to make sure the `dump.sql` file has been created successfully.

### Step 3: Downgrading Only: Remove Plan-Specific Modules

For information on downgrading, see [Downgrading from Fusion to Case](#).

### Step 4: Installing and Configuring Your Helpdesk

Your next task is to get the new product files up and configured on your web server, and then run the upgrade script.

#### Downloading, unpacking, and uploading the product files

Your next step is to download the product files, extract them on your local machine, and upload them from there to your server:

1. Log into my.GFI HelpDesk.com and click on the arrow under 'My Orders' to see your product details:
2. Here you can see all of the details of your license including a link to the product files:
3. Click the link to the product and save the file to your machine.
4. Extract the package locally.
5. The extracted folder contains a sub-folder named 'upload', which contains all your helpdesk files.
6. Using either the command line or an FTP client of your choice, upload all of the files from the 'upload' folder into the folder on your web server that you use to store your helpdesk.

**NOTE:**

If you are using an FTP client, make sure upload is done using binary mode.

### Uploading your file attachments and GeoIP directories

The product files you uploaded come with empty directories for your 'files' and 'geoip' folders. Add your backed up data to those folders.

1. Upload the archives of the 'files' and 'geoip' directories from your '[GFI HelpDesk\_backup]' folder into the '\_\_swift' directory on your server.
2. Extract the archives.
3. Copy the contents of 'files\_backup' into 'files' and 'geoip\_backup' into 'geoip'.
4. Delete the archives and the empty '\_backup' folders from your server.

### Reconfiguring your helpdesk files

There are a few configuration steps for your product files before you run the upgrade script.

#### Rename 'config.php.new'

To avoid accidental overwriting of any existing 'config.php' files, the '\_\_swift/config/' directory comes default with a files called 'config.php.new'. Provided you do not have any conflicting 'config.php' files, you must rename this file to 'config.php' before continuing.

#### Edit 'config.php'

The 'config.php' file must be manually edited to match the configuration of your helpdesk's database connection.

The following variables in this file need to be edited:

- » `$_DB["hostname"]` – Needs to be set to the hostname of your GFI HelpDesk database.
- » `$_DB["username"]` – Needs to be set to the username of your GFI HelpDesk database admin user.
- » `$_DB["password"]` – Needs to be set to your database user's password.
- » `$_DB["name"]` - Needs to be set to the name of your GFI HelpDesk database.

Here's an example of what the database details in your 'config.php' file should look like:

```
/** * DATABASE HOSTNAME */
define('DB_HOSTNAME','localhost');

/** * DATABASE USERNAME */
define('DB_USERNAME','gfihelpdesk_user');

/** * DATABASE PASSWORD */
define('DB_PASSWORD','enter password of your choice');

/** * DATABASE NAME */
define('DB_NAME','gfihelpdesk');
```

#### **NOTE:**

The rest of the settings in config.php should be left unchanged unless you are very familiar with the system.

After editing `config.php`, save it.

### **Upload 'key.php'**

In order to activate the product, [download](#) the key.php file corresponding to your registered domain from <https://accounts.gfi.com/> and upload it to the root folder in which the rest of the helpdesk files have been uploaded.

### **Set file permissions**

GFI HelpDesk needs write permissions, recursively, for five directories:

- » `__swift/*.*`
- » `__swift/cache`
- » `__swift/geoip`
- » `__swift/logs`
- » `__apps`

Please choose the section below that corresponds to your operating system if you are unfamiliar with changing permissions on directories.

#### **NOTE:**

It is usually possible to change directory permissions using an FTP client, but that is out of the scope of this document. Please consult your FTP client's documentation to learn how to change a directory's permissions using that tool.

*Unix-based servers:*

On a Unix-based system, use the 'chmod' command to set permissions to '777' on the aforementioned directories:

1. Run the command from within the `__swift` directory: `chmod -Rf 777 files cache geoip logs`
2. Run the command from within the GFI HelpDesk root directory: `chmod -Rf 777 __apps`

*Windows-based servers:*

You have to make two adjustments if you are running GFI HelpDesk on a Windows-based server:

1. First, in the 'php.ini' file, set the `upload_tmp_dir` to 'C:\Windows\TEMP'.
2. Open up your 'php.ini' file, search for `upload_tmp_dir` and make sure it looks like this:

```
; Temporary directory for HTTP uploaded files (default is used if not specified).
upload_tmp_dir = C:\Windows\TEMP
```

3. Second, set some specific folder permissions for Microsoft's IIS. For the user account of the application pool being used for GFI HelpDesk, grant full permissions to the following folders:

- » files
- » cache
- » geoip
- » logs
- » \_\_apps
- » C:\Windows\TEMP

**NOTE:**

Mostly, the user account to be assigned is 'IUSR', unless your application pool accounts are modified. For details, refer to the [IIS documentation](#).

### Running the upgrade script

Whether you are upgrading your existing instance or downgrading from Fusion, run GFI HelpDesk's upgrade script to make sure you are using the latest version of the product.

To run the upgrade script:

1. Open up your browser and go to your GFI HelpDesk `checklist.php`. For example `https://www.yourdomain.com/support/checklist.php`.
2. Ensure that there are no errors / warnings prior to proceeding with the installation (by clicking **Install GFI HelpDesk**).
3. Review the license terms, and click **Agree**.
4. The setup utility checks to make sure your server meets all the requirements.
5. When it is done, click **Next** to start the upgrade.

**NOTE:**

The automated portion of the setup script may take quite some time. Do not interrupt it for any reason else your installation can be corrupted and you have to start over.

Once the upgrade is complete, a success screen is displayed, and you are ready to start reactivating your helpdesk.

Step 5: Reactivating Your GFI HelpDesk Helpdesk

### Re-enabling your email queues

The first thing to do, once the upgrade process is complete, is to capture any emails that came in while your helpdesk was unavailable. From there, you can re-enable all your queues so everything starts flowing again.

To re-enable your email queues:

1. Collect any emails from while you were away. Log in to the Admin Control Panel.
2. On the menu sidebar, click **Email Parser** followed by **Email Queues**.
3. Make a list of the queues you have set up to use the Pipe method.

**NOTE:**

You are going to use POP3 to go collect any missed emails, but then you can set your queues back to using the Pipe method if you prefer.

4. For all of your queues, regardless of mailbox type:

- a. Click the email address on the list.
- b. Next to **Mailbox Type** select **POP3**.
- c. Next to **Email Queue** is Enabled select **Yes**.
- d. Click the **Update** button.
- e. Repeat the steps above for all of your queues.

5. Next, we're going to schedule a custom task to force GFI HelpDesk to fetch your emails:

- a. Over on the menu sidebar, click Scheduled Tasks followed by Manage.
- b. Scroll down and find Fetch emails (POP3/IMAP) on the list and click the checkbox.
- c. At the top of the page, click the Execute button to run the task.

6. Now that you have pulled in any messages you missed, you can reset your Pipe queues:

- a. Log into the mail server of the address you are using to forward emails and re-enable mail forwarding to your support address.
- b. Come back to the admin control panel and select the address from the list.
- c. Next to Mailbox Type select Pipe.
- d. Click the Update button.
- e. Repeat the steps above for any other Pipe queues.

### Restoring your templates

Your next step is to restore any templates that you'd modified prior to the update.

**NOTE:**

If you did not modify or back up any of your templates, skip this section.

Restoring your template modifications from your backups takes a few steps. Follow the instructions in the article: [Managing Your Template Modifications](#) to reimplement your template modifications.

### Importing your language packs

If you created backups for your modified language packs, they're next on the import list.

**NOTE:**

If you did not modify or back up any of your language packs, skip this section.

To import your customized language packs:

1. Still in the admin control panel, from the menu sidebar, click Languages followed by Import/Export.
2. Select **Import** at the top of the page.
3. Next to **Template Group XML File**, click the **Choose File** button.
4. Navigate to your [GFI HelpDesk\_backup] folder, select the language backup you created, and click the Open button.
5. Click the Import button at the top of the page to finish the import.
6. If you've modified other language packs, repeat the same procedure for each additional language.

**Remove your placeholder page and 'cron\_disabled' directory**

Now that everything's up and running again in the background, it's time to take down the placeholder page you put up to divert people away from your Support Center. You can also remove the 'cron\_disabled' folder, as a new 'cron' folder is created when uploading the product files.

To take down the placeholder page:

1. Go to your GFI HelpDesk root directory.
2. Delete the 'index.html' page you put up at the beginning of this process.
3. Rename 'index\_down.php' back to 'index.php'.
4. Delete the 'cron\_disabled' folder.
5. Visit your support URL – you should see your GFI HelpDesk Support Center.

**Last step! Rebuild support desk cache**

Rebuild your cache to make sure your desk is not hanging onto any outdated data that could interfere with things. There are two steps for this:

1. On your web server, go to the `__swift/cache/` directory and delete everything.

**NOTE:**

These are temp files and are replaced as soon as you complete step 2, below.

2. In the GFI HelpDesk admin control panel, click **Diagnostics** and then **Rebuild Cache** in the sidebar.

## 2.2.2 Migrating GFI HelpDesk from one server to another

This topic provides the steps on how to migrate your GFI HelpDesk from one server to another.

To migrate your GFI HelpDesk helpdesk to another server, follow the steps below:

1. As a precaution, take a backup of your database, templates, languages and code modifications (if any). For more information on helpdesk backups, refer to the topic [Upgrading \(or Downgrading\) Your GFI HelpDesk](#).
2. Check if all the prerequisites are installed on the server on which you are about to migrate the helpdesk. For more information on server prerequisites, refer to the topic [Server Configuration Requirements](#).
3. Move all the product files from the old server to the document root of the new server.

4. Assign full permissions (Read, Write, and Execute) to "cache", "geoip", "logs" and "files" directories, which are available under the `__swift` folder, along with the `__apps` directory.
5. Create a new database and import the database dump taken in Step 1 from the old server to this new database.
6. Enter the new database details (Hostname, Database\_name, Database\_username, and password) in the `config/config.php` file.
7. If the domain remains the same after migration, you may skip Steps 7 and 8, otherwise, you need to change the product URL in the database by using the following query from the MySQL CLI (Command Line Interface):

```
mysql> update swsettings set data = 'http://newproductURL/' where vkey = 'general_producturl';
```

8. After carrying out the above-mentioned steps, you need to contact support to change the registered domain name, since you need to replace the previous key with the new license key corresponding to the new domain.
9. Once you replace the old key with the new one, rebuild the help desk cache from the web browser using the URL in the following format: `http://<new-productURL>/staff/index.php?/Core/Default/RebuildCache`.

## 2.3 License

GFI HelpDesk is available in yearly subscriptions from GFI Software or one of the certified GFI Partners. It is licensed by User and a single live accessible installation of the Software is permitted and optionally an additional 1 (one) private installation is available for use only by Customer for internal testing purposes.

Each live installation of the Software can be accessed through the licensed domain names associated with the license.

License files are available for download from the GFI Accounts portal at <https://accounts.gfi.com> and the latest file should be used at all times. In order to increase the number of users this can be done at renewal or another other time by reaching out to GFI Software or the GFI Partner.

To change your domain names reach out to the GFI Customer Care team on [customers@gfi.com](mailto:customers@gfi.com).

Include the following information on your email:

- » On which license this is linked to your account on [accounts.gfi.com](https://accounts.gfi.com)
- » The final list of the domains that should be in the license

In case of adjustments to a trial license, you can simply request a new trial license from <https://www.gfi.com/helpdesk>.

Learn more about [downloading](#) and [upgrading](#) licenses.

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### 2.3.1 Open source software in GFI HelpDesk

This document lists the open source components of GFI HelpDesk. It is to the best of our knowledge and the information available at the time is complete with respect to the latest versions of our software.

However, we make no guarantees as to the completeness or accuracy of the list.

## GFI HelpDesk (Fusion and Case)

Library	License	Compatibility
ADODB	BSD/LGPL	v5.08
Dwoo	BSD-style	v1.0.1
FGMenu	MIT/GPL	v3.0
FirePHPCore	New BSD	v0.3
HTML2Text	GPL	v1.0
HTMLPurifier	LGPL	v4.5.0
javascriptpacker	LGPL	v2.0.2
Jaxl	New BSD	v3.0.0
jCaret	MIT	v1.0.2
jGrowl	MIT/GPL	v1.2.6
JPlayer	MIT/GPL	v2.3.0
jQuery *	MIT	v1.7.2
jQuery Curvy Corners	LGPL	v1.9
jQuery QTip	MIT/GPL	v2.1.1
Less	MIT/GPLv3	v0.3.5
PHPExcel	LGPL	v1.7.6
ReCaptcha	MIT	v1.5
SQLParser	LGPLv3	v0.5
SwiftMailer	LGPLv3	v5.0.1
TCPDF	LGPL	v5.9.009
Text Diff	LGPL	v1.26
TinyMCE	LGPL	v4.0.3
XRegExp	MIT	v1.5.1

\*jQueryUI, jQuery cookie, jQuery blockUI, jQuery Multiple File Upload Plugin, jQuery Color Picker, jQuery Validation, jQuery Form, .cookieJar, jQuery JSON, jQuery Autocomplete, jQuery Star Rating, jQuery Treeview

MIT

## GFI HelpDesk Desktop for windows

Library	License	Compatibility
aspell	GPL	v0.60.5
libcurl	MIT	v7.28.1
libexpat	MIT License	v2.0.1
libjingle	BSD	

Library	License	Compatibility
pjsip	GPL	v1.14
SQLite	Public Domain	v3.6.10
TightVNC	GPL	
OpenSSL	BSD	v1.0.1c
zlib	BSD	v1.2.6

## 2.4 Downgrading from Fusion to Case

To downgrade from Fusion edition to Case edition, obtain your new updated license key file `key.php` by following the instructions in the topic [Downloading the license file for GFI HelpDesk](#).

Then follow the operation below to remove unlicensed modules, without having to do a full reinstallation again.

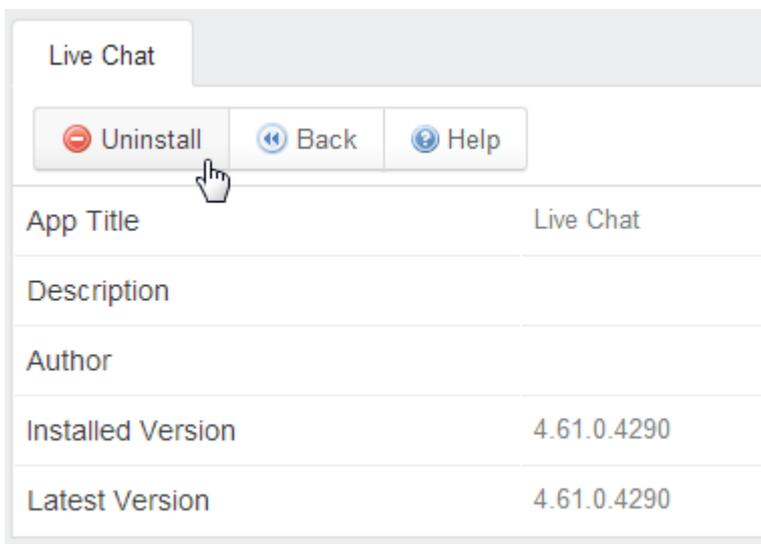
If you are switching from GFI HelpDesk Fusion to GFI HelpDesk Case, follow these instructions to disable/remove the live chat elements from your helpdesk.

*Fusion-to-Case: Disable the "Live Chat" icon*

Disable the "Live Chat" icon featured on the Client Support Center so that it no longer appears for the clients to click. To do that, log in to the Admin Control Panel of the helpdesk and navigate to **Settings >> Live Chat >> Client Support Interface Settings** and set the option **Display Live Support Status Icon** to **No**.

*Fusion-to-Case: Uninstall "Live Chat" and OnSite modules*

Log in to the Admin control panel and click Apps under the Options menu. The "Live Chat" module is seen installed and it has to be uninstalled. To do so click on the "Live Chat" option and uninstall page opens. Click "Uninstall" as shown in the following screen-capture to remove the "Live Chat" module.



*Screenshot 3: Click uninstall*

Follow the same procedure to remove the 'OnSite' module.

*Fusion-to-Case: Removing "livechat" and "OnSite" directory*

The "livechat" and "OnSite" directories are placed under the `__apps` directory that needs to be removed. If you do not remove them these options still shows up in the helpdesk, although the modules have already been uninstalled.

## 2.5 GeolP

GFI HelpDesk has built-in functionality to identify the location of visitors to your helpdesk from their IP Address.

Presently, GFI is offering lite database versions for both City (Locations) and City (Blocks).

To enable this functionality, install the GeolP files and index them in the database.

The GeolP files are available to download from <https://cdndn.gfi.com/gfihelpdesk/geoiplite.zip>.

Installing GeolP files

### To Install the GeolP files, do the following:

1. [Download](#) the GeolP files package.
2. Upload the contents of the package to `/__swift/geoip/`.
3. From GFI HelpDesk Admin Console go to **GeolP**. (Your admin domain looks like: `http://<YOUR HelpDesk DOMAIN>/admin/`).

Indexing the installed GeolP files

### To Index City (Locations), do the following:

#### Note:

This database is quite small and indexing is quite fast.

1. Click **City (Locations)** tab.
2. Click **Update**. Wait for the process to complete. Do NOT close the browser window.

The screenshot shows the GFI HelpDesk Admin Console interface. At the top, there is a navigation bar with the GFI HelpDesk logo and links for Home, Staff, Departments, and Users. Below this, there is a sub-navigation bar with Home and Settings. A search bar is located on the left side. The main content area is divided into two columns. The left column contains a sidebar with the following options: Settings, REST API, Tag Generator, Templates, Languages, Custom Fields, and GeolP (highlighted in blue). The right column contains the GeolP settings page for City (Locations). It features a tabbed interface with tabs for City (Locations), City (Blocks), Netspeed, ISP, and Organization. The City (Locations) tab is selected. Below the tabs, there are two buttons: Update (with a checkmark icon) and Help (with a question mark icon). Further down, there are sections for DATABASE INFORMATION, including License type and Last update, and INDEX SETTINGS.

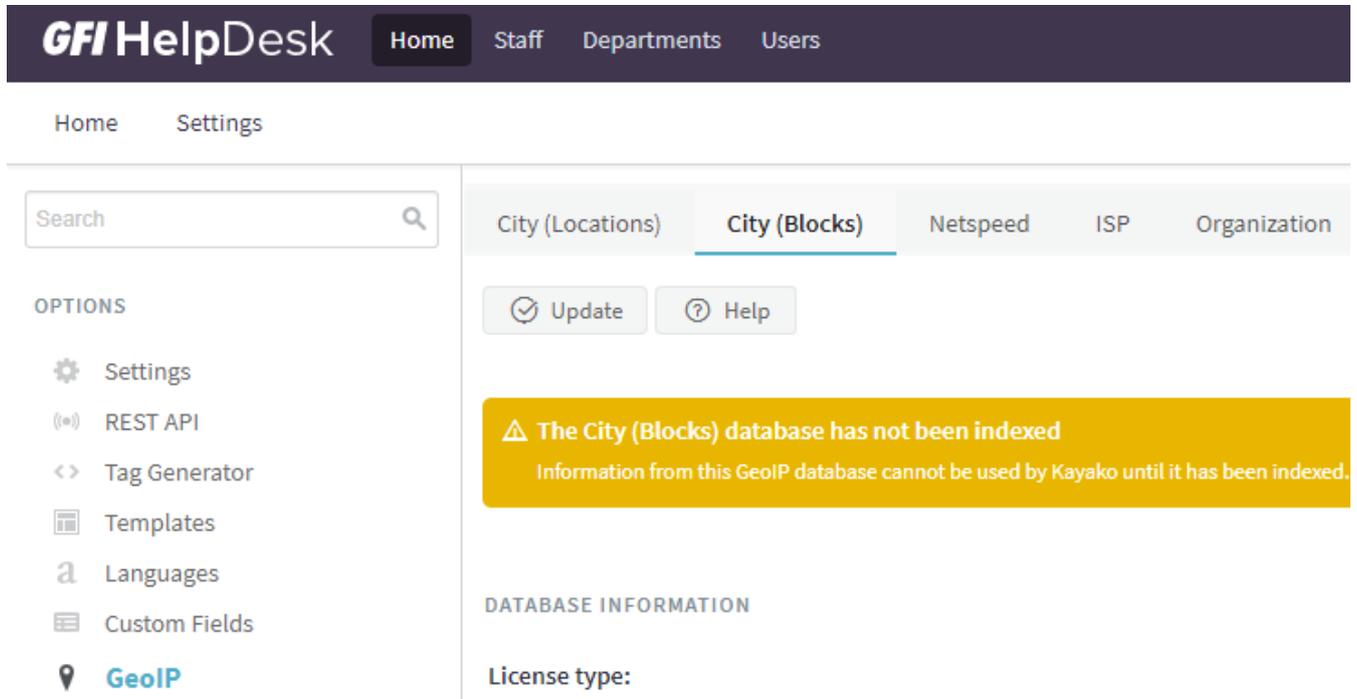
Screenshot 4: Update City(Locations)

### To Index City (Blocks), do the following:

**Note:**

This database is significantly large and indexing takes time.

1. Click **City (Blocks)** tab.
2. Click **Update**. Wait for the process to complete. Do NOT close the browser window.



Screenshot 5: Update City(Blocks)

If the process fails or the process does not progress, retry with different values based on your system resources.

From **INDEX SETTINGS**, reduce the **Entries to process per batch** to 100 and **Number of Batches to process in one page refresh** to 1.

## DATABASE INFORMATION

License type:

 Lite

Last update:

 05 June 2020 08:25 PM

## INDEX SETTINGS

**Entries to process per batch**

GeoIP entries are indexed in batches. You may wish to increase this number to speed up indexing, or lower it to reduce the demand on your server.

**Number of batches to process in one page refresh**

During indexing, the page will refresh a number of times. With each refresh, this number of batches will be indexed. Be careful when increasing this number - it can place a significant load on your server. If you run into problems, try lowering this number and grabbing a coffee.

*Screenshot 6: Adjust Index Settings if the process fails*

## 3 Using GFI HelpDesk

GFI HelpDesk helps you set up a cutting edge customer support system. There are tools and workflows available to automate follow-ups and reminders for support agents.

Topics in this section:

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### 3.1 Quick start guide

Get to know GFI HelpDesk with guides to the interface, key features, and common workflows.

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### 3.1.1 Understanding user types and interfaces

You are on your way to delivering amazing support to every one of your customers. This guide is designed to help you get familiar with the basics and hit the ground running.

By the end of this section, you will know how GFI HelpDesk is organized, where to find each tool and section, and what to do there.

#### Meet user types:

There are three (3) types of user in GFI HelpDesk: admin (that's you), staff and the end user. Each has their own home:

User type	Their area	Where to find it
Administrator user	Admin control panel	yourname.gfihelpdesk.com/admin
Staff user	Staff control panel	yourname.gfihelpdesk.com/staff
Your customers (end users)	Support center	yourname.gfihelpdesk.com

An admin user is a staff user, but with admin privileges, which means they can access the admin control panel.

You can set up most of your helpdesk in the admin control panel. Then you can head over to the staff panel to begin handling your customers and resolving tickets.

Meanwhile, your customers can use the support center to browse self-service content, submit new tickets, review their previous tickets and start live chats.

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### The areas of your helpdesk

Below are the areas of your helpdesk:

#### Admin control panel

An admin user is essentially a staff member with additional privileges. In the admin control panel, they can:

- » Add new teams and staff
- » Create new departments
- » Set permissions, restrictions and rules
- » Customize the support center

- » Add custom statuses, priorities and types
- » Manage rules, workflow, and automation

## Staff control panel

Anyone in your team who needs to talk with customers and manage the helpdesk needs a staff user account. Not all staff members are created equally, though. As an admin, you can set rights and restrictions for other staff members.

In the staff control panel, your team can:

- » Correspond with your customers
- » Create tickets (send emails to customers)
- » Manage and resolve tickets
- » Manage customer accounts and organization profiles
- » Publish self-service content to the support center
- » Review live chat transcripts and call recordings
- » Run reports

## Support center

The support center is the customer-facing touchpoint of your helpdesk. In the support center, your customers can:

- » Submit new tickets
- » Track and update their existing tickets
- » Start live chats
- » Get answers from your self-service content

Using the support center is optional: you do not have to force your customers through it. Customers can reach you via the helpdesk through email, live chat widgets, and phone without needing to use the support center.

Some GFI HelpDesk customers prefer to make the helpdesk transparent to the customer, others prefer to use the support center and provide a go-to support portal for their customers.

## The apps

### Kayako Desktop

Kayako Desktop is a Windows application which your team uses to connect to the helpdesk and use GFI HelpDesk's real-time support features: visitor monitoring, live chat, and voice.

### Download Kayako Desktop

## Getting help and support

**From the team:** You can get in touch with our team at any time: please [contact support](#). We are available all day during the week and offer limited support over the weekend.

**Community forums:** Posting on the community forums ([forums.gfi.com](https://forums.gfi.com)) is a great way to talk to and learn from hundreds of other customer service pros and helpdesk admins. Official support (that is, responses from the GFI HelpDesk team) is not guaranteed here. If you want support directly from the GFI HelpDesk team, please contact us directly.

### 3.1.2 Setting Up Your Team in GFI HelpDesk

To really get a feel for GFI HelpDesk at work, we suggest inviting your team members to join. You can then go through your customer service process together as a team. Try to involve at least one person from each team at your company, so each of them can bring a different perspective to the table when you set up your workflows.

In this topic, you can learn how to set up your team in GFI HelpDesk.

Each staff user belongs to a team, that is why you need to create your teams first - and then add staff users to them.

#### Create a new team

To create a new team, do the following:

1. Go to the Admin Control Panel, click on **Staff** and then **Insert Team**.
2. At this point, you can assign the new team to **Departments**, which gives members of this team access to the tickets and live chats in those departments.
3. In the next tab, you can set individual permissions for members of this team.

#### Note:

Access control in GFI HelpDesk is very powerful: you can control who can see, create, edit and delete most things in GFI HelpDesk.

We recommend leaving the defaults at this stage until you get familiar with GFI HelpDesk.

#### Add staff users

To add a new staff user, do the following:

1. In the Admin Control Panel, click **Staff** and then **Insert Staff**.
2. Fill in the essentials under the **General** tab.

**Remember your staff teams:** if you enabled **Administrator team** for one of them, any staff users you add to that team is able to access the admin control panel.

3. Under the **Assigned Departments** tab, you can either have this staff user inherit the department permissions from their team, or you can override them for this individual.

#### Note:

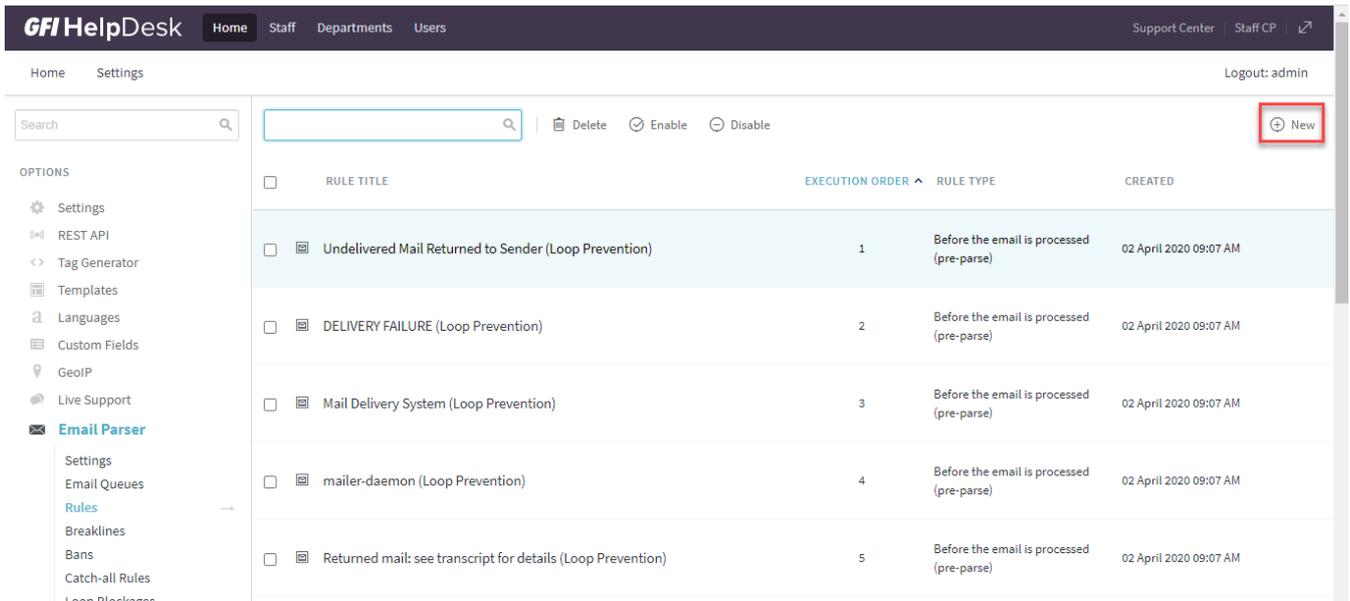
We recommend sticking to the defaults while getting started.

### 3.1.3 Guide to automation with GFI HelpDesk

Automated ticket rules are designed to minimize repetitive clicking and to keep you from typing out the same old messages over and over. In fact, when you implement rules, they do much of the admin work for you, freeing you up to focus on your customers.

We use email rules to help a ticket make its way to the right place from the moment it arrives in the e-mail queue.

To create a new email rule, click on **Rules** under **Mail Parser** on the **Options** menu. It looks like this:



Screenshot 7: To create a new rule

## Autoresponders

Autoresponders are automated emails sent to customers as a record of each ticket they submit in the support center. We generally suggest including key information, including ticket ID, Subject, Status and a direct link to the ticket, but you can also include Department, Type, and Priority of the ticket.

In addition to that, the other popular ways to use autoresponders are:

**User Registration emails**- to confirm and activate their support center account

**Survey emails**- to let customers rate their support experience

**Notifications**- to let staff users get these alerts when specified ticket or user actions occur

**News Subscriptions**- to alert customers whenever a new article is added to the helpdesk

**Auto-close**- to alert customers that an idle ticket has been closed (this can also be set to simply downgrade a ticket status)

To create an autoresponder template, click on **Templates > Manage Templates > Tickets > email\_ autoresponder**

Use macros to reply to tickets

Macros are powerful way to speed up ticket resolution by automating actions that you find yourself making very frequently. Ticket macros are 'predefined replies' taken to a new level.

With macros, you can quickly answer commonly asked questions using pre-written responses and pre-select ticket actions and move tickets through more quickly through the support process.

For example, we find ourselves referring tickets frequently to the finance department. Instead of informing the customer that their ticket is being transferred, transferring the ticket and changing the priority of the ticket...let's use a macro.

First, automate the move to finance by creating a macro called Move ticket to finance. This macro changes the ticket department to **Finance**, set the ticket priority to **Medium** and add a message in the reply area.

In the staff control panel, go to **Tickets > Macros**. Click on the **Insert Macro** button.

To use a macro, click on the **Reply** tab of a ticket. Above the ticket properties bar, find the **Macro selector**.

When you select a macro, two things happen:

- » The ticket reply area fills up the content you specified when creating the macro
- » The ticket properties bar is pre-selected with any ticket properties you specified when creating the macro

None of these things are saved or sent automatically. All the macro is doing here is filling in and selecting fields, so make sure to hit the **Send** button to save the ticket's property changes.

You can use this process to apply more than one macro (to combine a bunch of pre-written replies, for example).

### Canned responses

A canned response is very much like a predefined reply, except we use them in live chats (via GFI HelpDesk Desktop) instead of email.

This comes in handy, because text messages, images, URLs or code, can all be used as canned responses.

To create a canned response, first add a category or two by clicking **Insert Category** under the **categories** tab. Then go ahead and click **Insert Response** under the same tab.

### Visitor rules

Visitor rules are designed to automate the ID, group and mine information from visitors to your website. With this information, you can automatically offer a chat with visitors, who have browsed certain pages or have spent significant time on your site.

Rules take the repetitive work out of your hands, while still helping you help your most promising leads while you're fresh in their minds.

These are the two major ways you can target a visitor with visitor rules:

- » **When a visitor first enters your website**- rules are checked once when the visitor opens up the site.
- » **Each page a visitor opens**- rules are checked on every page load during a visitor's session.

To set up a visitor rule, find its section under the live support tab in the admin control panel.

### Auto-close a ticket

We can automatically close unresolved tickets that haven't been touched or updated a specified period of time.

From this page, you can create, delete, enable or disable auto close rules.

### Bonus: mail parser rules

Helpdesk parser rules can also determine department changes, which tickets are marked as spam, ticket priority, ticket status and so on. For this reason, this is a powerful automation tool.

For more information on mail parser rules, see [Mail parser rule essentials for setting up email rules](#).

## 3.1.4 Guide to setting up archiver custom app in GFI HelpDesk

The Archiver custom app allows you to delete/export old data in GFI HelpDesk. It gives an extension to the Maintenance menu in the admin panel.

The additional menu items provides an option to purge/export the old data for a specific user or a complete database. The custom app deletes records permanently, so it is highly recommended to keep database backups.

You must have an on-premise installation of GFI HelpDesk with the full access of source code. The code files of this custom app is placed under the installation folder of GFI HelpDesk and further, it needs to be installed as a plug-in under the Apps section in the admin panel.

In this topic, you can go through the steps necessary for installing Archiver custom app under the GFI HelpDesk installation, on your own server.

## Downloading, unpacking, and uploading the product files

The first part of the installation process is to download the product files from [here](#), extract the Zip file on your server machine where GFI HelpDesk is installed, and upload them from there to your server:

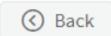
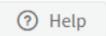
Further, copy the src directory to the \_\_apps directory of GFI HelpDesk installation, rename the src folder to archiver, navigate to the admin portal (Apps section) in your web browser.

APP DETAILS	INSTALLED VERSION	LATEST VERSION
 <b>INSTALLED</b> Reports	4.91.3	4.91.3
 <b>INSTALLED</b> News	4.91.3	4.91.3
 <b>INSTALLED</b> Knowledgebase	4.91.3	4.91.3
 <b>INSTALLED</b> Troubleshooter	4.91.3	4.91.3
 <b>INSTALLED</b> Tickets	4.91.3	4.91.3
 <b>INSTALLED</b> Mail Parser	4.91.3	4.91.3
 <b>NOT INSTALLED</b> <b>Archiver</b>	- NA -	1.0
Adds a new item to the Maintenance menu that allows administrators to delete/export old data in Kayako. This will permanently delete records! Be sure to keep database backups.		
<b>Author:</b> Werner Garcia		
 <b>INSTALLED</b> Live Chat	4.91.3	4.91.3

Screenshot 8: Navigate to the Apps section

Click on the **Archiver** link and install the plug-in.

### Archiver

**App Title** Archiver

**Description** Adds a new item to the Maintenance menu that allows administrators to delete/export old data in Kayako. This will permanently delete records! Be sure to keep database backups.

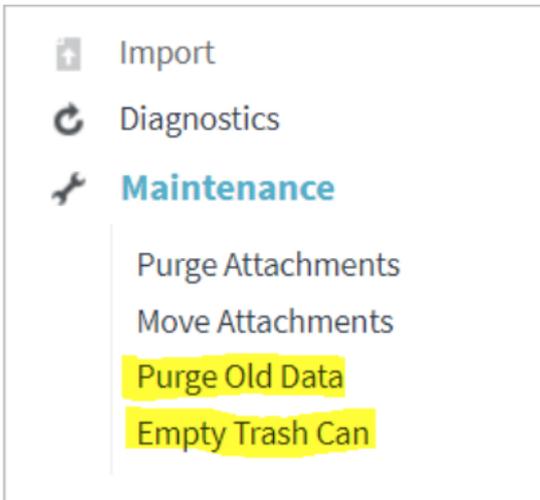
**Author** Werner Garcia

**Installed Version** - NA -

**Latest Version** 1.0

Screenshot 9: Click Archiver

Refresh and invalidate your browser's cache, so the new menu items are visible under the **Maintenance** menu in the **Admin** panel.



Screenshot 10: New menu items are visible

### Purging old data

Here you are allowed to search for tickets created in a specific date period, and if specified, belonging to a particular user.

#### **NOTE:**

It is a best practice and highly advisable to keep regular database backups.

## Purge Old Data

Search Help

### Warning

**Read before continuing**

This tool can make your system unusable if you don't know what you're doing.  
Remember to always make a backup of your data before deleting any records!

---

**Email**

Provide an email to narrow search only to tickets belonging to a single user (leave blank to fetch all tickets)

---

**Start Date**   

Start of date period to search for old data

---

**End Date**   

End of date period to search for old data (default to 3 months ago)

---

**Page Size**

Number of items per page in search results screen

Screenshot 11: Search for tickets belonging to a user

Leave the email field empty to search tickets belonging to all users. GFI HelpDesk shows a list of records that you can review before performing any action. The export option offers you a MySQL dump file and compresses it into a ZIP file to make a compressed low sized file.

**Purge Old Data**

**"6" Tickets Found**  
 Search found 6 tickets based on the criteria provided

TICKET ID	DEPARTMENT	STATUS	USER NAME	SUBJECT
2	-Trash-	Open	Kayako Admin	ticket 2
3	-Trash-	Open	Kayako Admin	ticket 3
4	General	Open	Kayako Admin	Ticket 4
5	Sales	Open	Kayako Admin	ticket 5
6	Marketing	Open	Kayako Admin	ticket 6

Page 1 of 2

Screenshot 12: List of tickets

It is advisable to export data before using the delete option. After hitting the **OK** button on the warning dialog box, the task progress window is displayed.

**Purge Old Data**

**100.00%**

Processing Table		swtickets	
Tables Processed	22	Total Tables	22
Rows Processed	28	Total Rows	28
Time Elapsed	3s	Time Remaining	0s

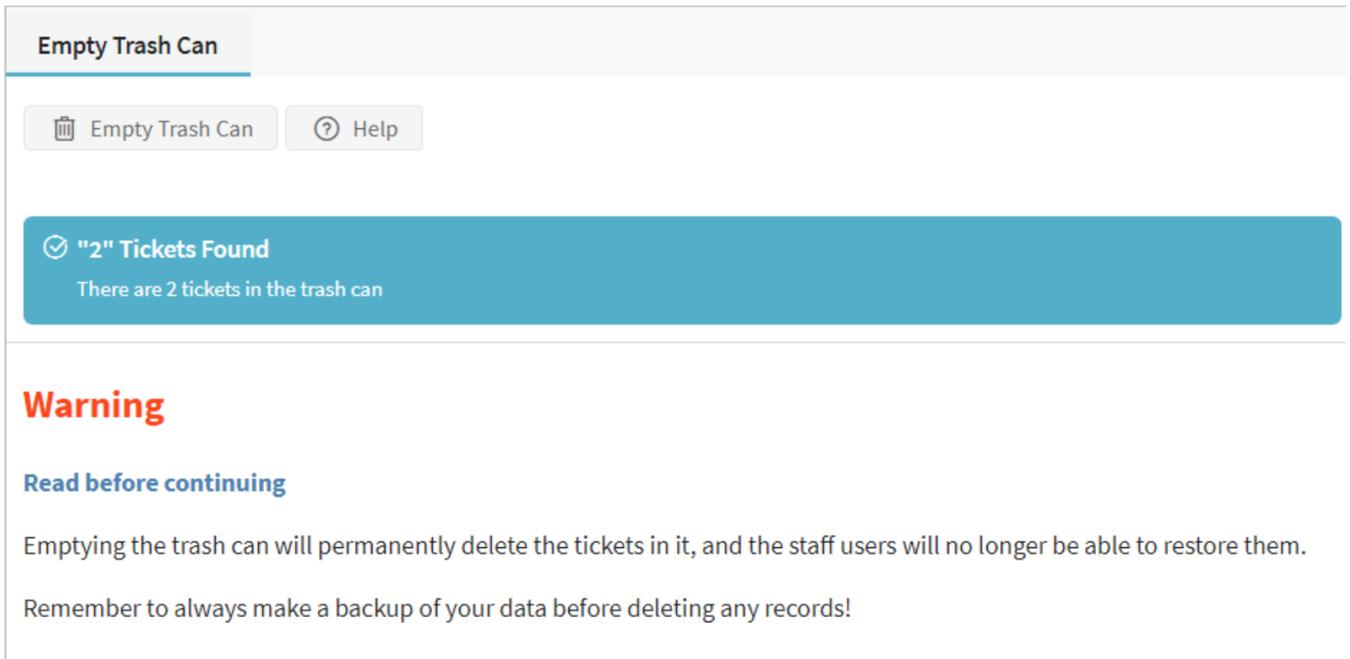
Screenshot 13: Task progress window

### Emptying trash

You can delete all the tickets stored in the Trash by the staff users.

**Note:**

These tickets cannot be recovered after the deletion.



Screenshot 14: Emptying trash

After hitting the **OK** button on the warning dialog box, the task progress window is displayed.

### 3.1.5 Guide to managing support tickets

In GFI HelpDesk, all of your customer conversations are tracked as tickets (you might also know them as support tickets, support requests or incidents).

Any message which comes into the helpdesk – whether from the web, the support center or email – is tracked as a ticket, keeping everything related to a conversation in one place.

#### Know the ticket basics

##### Departments

Tickets belong to departments. A department is like a folder for tickets: tickets can only belong to one department, and you can assign staff teams or individual staff users to departments, which allows them to access and manage tickets in that department.

Typical departments might include *Sales, Support, Opportunities, Bugs* and *Receipts*.

Departments can be public or private: if a department is public, it means your customers can select that department when creating a new ticket in the support center.

##### Ticket properties

A ticket has various ticket properties which let you manage incoming requests effectively and build a speedy workflow.

Property	Examples	Description
Type	Issue, Feed-back, Bug, Lead	A ticket type usually indicates the type of ticket, to label tickets with something specific to their content or context. Which ticket types you create depends on your organization. Some GFI HelpDesk customers like to use ticket types for improved reporting and analytics: for example, the nature of an Issue type ticket may well be different to a sales oriented Lead ticket.

Property	Examples	Description
Status	Open, On Hold, Closed	A ticket has a status, which represents where the ticket is on its journey towards resolution. Typically, tickets come in to the helpdesk as Open, are set to On Hold while you're waiting for a response from the customer and are set to Closed once the ticket has been resolved. You can create custom statuses to suit your own workflow.
Owner		Tickets can be assigned to individual staff users (who then become owners of the ticket), which usually means that individual takes responsibility for the ticket.
Priority	Low, Medium, High	Ticket priorities are fairly self-explanatory. You can create custom priorities to suit your own workflow, and also allow your customers to select their own priority when creating their own tickets (useful because you can configure GFI HelpDesk to trigger different notifications depending on a ticket's priority as well as other properties).

## How your customers create tickets?

### Using the support center

By default, your customers can submit new tickets in the customer-facing support center ([yoursupportcenter.gfihelpdesk.com](mailto:yoursupportcenter.gfihelpdesk.com)).

Your customers can select the department to create the ticket in, as well as a priority, subject, message and file attachments.

This is highly configurable: you can create custom fields to capture specific pieces of information from your customers (more about that below), determine which departments they can select, whether or not they can select their own priority or whether they can create their own tickets at all.

If you have started building your knowledgebase, GFI HelpDesk automatically searches for and suggest answers to your customers as they type out their enquiry (reducing the number of incoming support requests, increasing customer WOW!).

### Email

You can connect your GFI HelpDesk helpdesk to any number of POP3 or IMAP mailboxes to bring email into the helpdesk from across your organization.

By bringing your organization's email into the helpdesk, you can enable your team to distribute and collaborate on tickets in one place, rather than managing lots of separate mailboxes and email addresses.

GFI HelpDesk takes care of all the message processing automatically: determining what is a reply to an existing conversation and should be added to an existing ticket, which emails should create a new ticket and whether an existing ticket should be reopened. You can also use GFI HelpDesk's powerful email parser rules to automate the routing of email and tickets.

Find out more about fetching email into GFI HelpDesk below.

### API

You can use the GFI HelpDesk REST API to automatically create tickets on behalf of anyone - whether generated by your backend systems or other integrated apps.

Find out more about the GFI HelpDesk at [REST API](#).

## Reply to a ticket

This can happens in the staff control panel ([yourhelpdesk.gfihelpdesk.com/staff](http://yourhelpdesk.gfihelpdesk.com/staff))

Here, your team can review, assign, reply to and manage tickets. Your team can also create tickets (in effect, sending an email to a customer) or create tickets on a customer's behalf (for example, if you want to record the details of a phone conversation or ask someone to follow up with the customer by email at a later date).

On the left hand side, you can see the **department tree**. This lists all of departments you have been assigned to. Click on status under each department to view the tickets in that department and set to a particular status.

Above the department tree, there are a shortcut filters.

- » **My Tickets** shows you all of the tickets which are open and are assigned to you.
- » **Inbox** shows tickets which are open.
- » **Unassigned** shows tickets which are open and not yet assigned to anyone.

Open a ticket and click on the **Reply** tab to start composing a reply. At the same time, you can change the ticket's properties (like the status and priority) which is saved once you send the reply.

### Fetch email into GFI HelpDesk

You can connect GFI HelpDesk to any number of POP3 and IMAP mailboxes using Email Queues, which are responsible for:

- » connecting to the mailboxes
- » fetching email
- » processing the email into tickets

Find Email Parser in the admin control panel ([yourhelpdesk.gfihelpdesk.com/admin](http://yourhelpdesk.gfihelpdesk.com/admin)) and then click on **Email Queues**. Click on **New**, and then follow the steps to connect your mailbox.

For more information, see [Introduction to email queues](#).

### Custom fields

GFI HelpDesk's powerful custom fields builder helps you customize various forms across the helpdesk - including the new ticket form - allowing you to make sure the right information is collected from customers to equip your team to answer customer enquiries quickly.

To create a custom field, find Custom Fields in the admin control panel. First, create a custom field Group to organize your custom fields. In this example, we have group called Product information and various fields to collect information about a customer's product.

For more information, see [Introduction to email queues](#).

### Bonus: Turbo charge your tickets

GFI HelpDesk is ready to go out of the box. While we've quickly gone through the basics, there is a lot more GFI HelpDesk can do to turbo charge your support and enable your team to improve customer satisfaction.

If you're ready to dive in, we suggest starting here:

- » [Configuring SLA plans to set reply and ticket resolution deadlines](#)
- » Ticket macros to speed up ticket responses
- » Customizing ticket views and filters in the staff control panel

## 3.1.6 Building your knowledge base

The Knowledge Base is a library designed to help your customers answer their own questions with standard information, how-to's, and instructions.

Your self-service resources is so helpful that your agents can help customers with more inquiries that need their personal attention.

Some of our most successful customers have grown theirs into extensive libraries by adding just one to two articles at a time.

## Create categories

The knowledge base is organized entirely by category for easy viewing. You can start an article with inbuilt Root category or create a new category by clicking Insert Category.

Once you have established this, you can go on to do the following from this page:

- » Insert a sub-category
- » Insert a new article in a category
- » Filter articles within a category

## Publish an article

To create a new article:

1. Click **Knowledgebase** on the navigation bar.
2. Choose **New Article**.

### Notes:

- » When you are drafting an article, remember to hit **Update** early and often to save your work.
- » You can place this article in multiple categories, which comes in handy when you are creating multiple guides with overlapping information.

## Moderate comments

- » Customers can rate and comment on knowledge base articles, which you can moderate in the admin + staff control panels.
- » If you encourage your customers to do this (and you should), it becomes a valuable source of direct feedback for improving or retooling your articles.
- » By default, the comments are not published to your knowledge base until a staff user approves.
- » Finally, there are three things you can do with a comment: approve, reject, or mark as spam.

## Publish news or announcements

Use the **News** section to publish news and announcements for your customers to see when they log into the helpdesk. Every time you publish a new announcement, you can have an automated email sent to every customer who subscribes to this feature.

### 3.1.7 Helping your customers submit tickets

This topic provides a starting point for helping your users submit their first tickets through your support site. The sections below covers the basic steps your users needs to follow to get started. Since every GFI HelpDesk-powered support site is different, the steps and screenshots below may vary from what your users experiences.

This guide is designed as a starting point, which you can modify to suit the particulars of your support site.

### Note:

Everything below is directed at the end users of your support site. Feel free to copy this article and edit it to fit your needs.

To make it easier to reach out to our support team, we have put together this guide to help you get started. Below are the instructions for creating an account, as well as submitting and tracking your support requests.

---

---

## Creating an account and logging in

The first step is to register for an account on the support site. This lets you log in and submit tickets to our support team. To create an account:

1. Open your web browser and visit <support.yourcompany.com>.

### Note:

It is useful to bookmark the site so you do not have to type it in every time.

2. Click the **Register** button. It should look like this:

## Create a new account

Please fill in the fields below to register a new helpdesk account.

### General Information

Full Name:

Email:

Password:

Password (repeat):

I consent for Kayako to process my data and agree to the terms of the [Privacy Policy](#)

### CAPTCHA Verification

Please enter the text you see in the image into the textbox below (we use this to prevent automated submissions).

ee71 dg 1 z

Register

*Screenshot 15: Create account*

3. This takes you to a form where you can fill in the details for your user account.

4. Fill in your details, complete the **CAPTCHA** questions and click Register.

5. You receive an email to confirm that your account has been created. Open the confirmation email and verify your account.

6. Now, you are ready to log in.

Your next step is to log in to the site.

To log in to the support site

1. Switch back to the support site in your browser.
2. Go to the login form.
3. Enter the email address and password you used when registering on the site.

**Note:**

You are taken to a page where you can fill in details for your account profile.

4. Add any details you like, and click the **Update** button to save your changes.

Now you are ready to get in touch with our support team.

### Submitting your first ticket

Requests to our support team are handled in the form of support tickets. This section walks you through the process of submitting a support ticket.

To create your first ticket:

1. Go to the front page of the support site and make sure you are logged in.
2. Click the **Submit a Ticket** button.

**Note:**

You can also click the Submit a Ticket link on the top navigation menu.

3. From here, you may fill in the details for your support request. We will go through each one step-by-step.
  - a. First, select a department to submit your ticket to. This tells our support team what your request is related to.
  - b. Click the **Next** button.
  - c. On this screen, describe the problem you are having. From the Priority pull-down, choose the option that best describes the problem you are facing. This is how we try to think about each priority level:

The screenshot shows a web form with two main sections. The first section, titled 'General Information', contains a 'Priority' dropdown menu currently set to 'Low'. The second section, titled 'Your Message', contains a 'Subject' text input field and a large, empty text area for the message body. At the bottom of the form, there is a link that says 'Attach Files [+ Add File]'.

Screenshot 16: General information

- d. Next, in the Subject field, give us a brief description of what is happening.
- e. Then, in the big text area, go into details. The more specific you can get about what you are experiencing, the better.

**Note:**

Once you start typing in the description for your ticket, suggestions for knowledge base articles that might be relevant to your request appears.

- f. When you are done writing up your issue, you also have the option to attach a file (photo, screenshot, PDF, etc.) that helps illustrate your issue:
  - i. Click the **Add File** link.
  - ii. Click the **Choose File** button.
  - iii. Select the file you want to attach and click the **Open** button.
- g. Review the details of your ticket and click the Submit button at the bottom of the screen to send your request to our support team.

Once your request has gone through, you can see a confirmation screen. This means we have received your issue and someone on our team will be in touch as soon as possible.

### Tracking and responding to existing tickets

Once you have submitted a ticket to the support team, you have two options for following up on it:

### » **Option 1: Email**

In addition to receiving a confirmation email when we receive your request, you also get an email when we reply. You can simply reply to that email (without changing the subject line) and our support team receives your responses.

### » **Option 2: Support site**

Alternatively, you can view and respond to any tickets you have open directly from the support site interface. Below, you can find instructions for using the support site to track your tickets.

To access your existing tickets from the **Support Site**:

1. Head to the front page and make sure you are logged in.
2. Click the **My Tickets** button.

#### **Note:**

You can also click the **My Tickets** link on the top navigation menu.

3. A page with a table that lists all of your tickets opens. The table provides some basic information about the status of each ticket, but clicking on the ticket's subject gives you a much closer look.

# Problems logging in

Created: 26 February 2016 12:49 AM Updated: 26 February 2016 12:52 AM  
 Overall Satisfaction Ⓞ★★★★★

DEPARTMENT Support	OWNER Kelly	TYPE [ Private ]	STATUS Awaiting Reply	PRIORITY Normal
-----------------------	----------------	---------------------	--------------------------	--------------------

[Add Reply](#)

**Frances**  
User

Posted on: 26 February 2016 12:49 AM NEW

Every time I try to log in, I'm getting an error message that says 'Unrecognized user name or password'. I've tried resetting my password, but it hasn't fixed anything. What should I do?

Thanks,  
Frankie

**Kelly**  
Customer Support Rep  
Staff

Posted on: 26 February 2016 12:52 AM NEW

Hi Frankie,

I'm so sorry to hear you're having trouble logging in! We can definitely help you with that.

I know we've been having some trouble when people are trying to login from Internet Explorer. Can you tell me what browser you're using?

Thanks so much,  
Kelly

Screenshot 17: Sample ticket

4. You can see at the top the **Department, Owner, Type, Status,** and **Priority** of your request. You have the option of modifying the last two options:

- » From the **Status** dropdown, if your problem has been resolved, you can select **Closed** at any time.
- » From the **Priority** dropdown, if your problem has gotten worse or better, you can adjust the priority here.

5. In addition, you can also see a complete history of your request, starting with your initial message at the top.

6. If your ticket is in need of a response, click the **Add Reply** above the conversation history.

7. A large text box opens up and you can type your response, as well as attaching any additional files that would be useful.

8. When you are done, click the **Send** button to submit your response.

9. You can come back to this page at any point to check in on the status of your ticket.

We hope this gives you a good introduction to submitting and tracking tickets from our support site.

If you have any questions, do not hesitate to contact our support team.

## 3.2 Support tickets

Brush up on building ticket views, defining custom fields, and managing GFI HelpDesk support tickets.

Topics in this section:

---

3.2.1 Establishing service level agreements (SLAs) and escalations .....	51
3.2.2 Advance support tickets .....	55

---

### 3.2.1 Establishing service level agreements (SLAs) and escalations

Service Level Agreements (SLAs) are a useful tool for achieving good customer service. In GFI HelpDesk, you can build SLAs that set time limits for either ticket replies or ticket resolution. This gives you an easy way to track which tickets need the most immediate attention.

The other part of the SLA equation is escalations. An escalation is an action or set of actions that GFI HelpDesk can perform automatically when a support ticket has failed to meet an SLA.

#### Understanding how SLAs come together in GFI HelpDesk

The process for establishing an SLA in GFI HelpDesk follows three basic steps:

- » Adding your support team's schedule to GFI HelpDesk.
- » Establishing an SLA to track your team's targets for response or resolution times.
- » Creating an escalation that acts on support tickets that don't meet their SLAs.

GFI HelpDesk calculates whether a ticket has breached an SLA's time limits based on your team's working hours.

Suppose your support team keeps daily office hours from 9:00 A.M. - 5:00 P.M, which is 8 hours. If you use an SLA plan with a 24-hour reply time, that means that any ticket with that particular SLA must be replied to within 24 working hours. In other words, your team would have 3 working days ( $8 \times 3 = 24$ ) to reply to that ticket.

For any ticket that is not replied to within that time frame, you can create an escalation that makes sure your team follows up on it. Escalations can perform a variety of actions like changing the ticket's priority, assigning it to a particular staff user, or moving it to another department.

You can set up different SLAs to handle different types of support tickets. For example, you could use tags to distinguish simple 'How-to' requests from more complex 'network configuration' issues, and then set up separate SLAs to handle each.

'How-to' tickets might have a 2-hour reply time because they are relatively easy to address, while 'network configuration' issues might have a 6-hour reply time, since they can take more time to investigate.

The topic below discusses a step-by-step process of setting up a new SLA.

As an example, the new SLA is to be set up for a team that provides support from **9:00 AM - 5:00 PM, Monday-Friday**, with weekends off.

In that timeframe, we ensure that any ticket marked 'High' priority is replied within 2 hours and resolved within 4 hours, at the max.

Additionally, if a ticket misses either of them, we're going to make sure the ticket gets escalated by bumping its priority up to 'Critical' and sending an email to the staff member assigned to the ticket.

## Creating and Configuring SLAs and Escalations

To add and configure an SLA and escalation:

1. Log into the Admin Control Panel and click the **SLA** link on the sidebar.
2. First, team's work schedule needs to be defined, so GFI HelpDesk knows what hours of the day should count toward the time limits. To do this, click Schedules.
3. On this page, you can see the default work schedule that comes built-in. But we want to customize a new one, so click **New** in the upper right area.
4. In the **Schedule Title** field, enter a name for your schedule.
5. Click the **Open (Custom)** radio button on the 'Monday' row. (As per our example - team is working from 9-5, Mon-Fri).

Schedule Info

 Sunday	<input type="radio"/> Open (Custom) 	<input type="radio"/> Open (24 Hours)
 Monday	<input checked="" type="radio"/> Open (Custom) 	<input type="radio"/> Open (24 Hours)





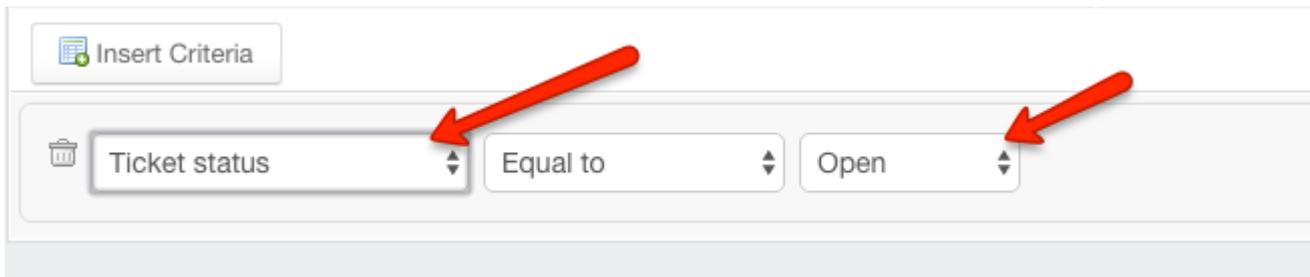
Screenshot 18: Click Open(Custom) radio button

6. Option to define your **Open** and **Close** times is displayed. Select **'9:00'** and **'17:00'** respectively.
  7. Repeat that process for the Tuesday through Friday rows.
  8. Click **Insert** at the top of the page to create your new schedule. The working time is configured!
- Now that the working time is configured in GFI HelpDesk, next the SLA plan needs to be set up.

1. Click the **Plans** link on the sidebar.
2. List of existing SLAs in GFI HelpDesk is displayed. Click **New** to add a new SLA.
3. In the **SLA Plan Title** field, enter a descriptive title for your SLA.
4. In the is configured field enter **2** to set the two-hour target.
5. In the **Resolution Deadline** field, enter **4**.
6. From the **SLA Schedule** dropdown, select the work schedule created above.
7. Leave **SLA Plan Enabled** set to **Yes** to activate this SLA right away.
8. Enter **1** in the **SLA Plan Sort Order** field. This sets GFI HelpDesk to apply this SLA first, in any situation where more than one SLA applies to a ticket.

Now, configure GFI HelpDesk to set which tickets this SLA should apply to. (As per our example, we want to apply this SLA to any open, high-priority tickets).

1. In the first row, select **Ticket Status** in the first dropdown and Open in the third.



Screenshot 19: Select Ticket Status

2. To set the second criteria, click the **Insert Criteria** button, and select **Ticket priority** in the first dropdown and **High** in the third.

**NOTE:**

As you can see, there are a lot of options for how to define the criteria for SLAs. It's worth taking note of the other options available here, for future SLA projects.

3. Click **Insert** to create your SLA plan.

Finally, GFI HelpDesk needs to be configured to handle tickets that do not meet the deadlines set in the SLA plan. In other words, escalations needs to be configured.

1. Click the **Escalations** link on the sidebar.

**NOTE:**

Remember, you need to have cron enabled on your server for the escalations to work.

2. List of existing **Escalations** are displayed. Click **New** to start a new Escalation Rule.

3. In the **Rule Title** field, add a descriptive title for your escalation.

4. From the **SLA Plan** dropdown, select the SLA plan you created above.

5. From the **Escalation Type** list, select **Either reply or resolution overdue** because we want the ticket to be escalated if it misses either of these deadlines.

6. In the **Actions** section, you can set what actions to perform on the tickets violating SLA. We just want to bump the ticket priority up a level so from the Ticket Priority dropdown, select **Critical**.

Actions	
Assign ticket to a staff user	-- No Change --
Move ticket to a department	-- No Change --
Change ticket type	-- No Change --
Change ticket priority	Critical
Change ticket status	-- No Change --
Change the ticket's SLA plan	-- No Change --
Flag the ticket	-- No Change --
Tag the ticket	Start typing to insert tags...
Remove tags from the ticket (if set)	Start typing to insert tags...

Screenshot 20: Select critical

7. Setting up notification email whenever the escalation is applied. At the top of the screen, click the **Notification** tab.

**NOTE:**

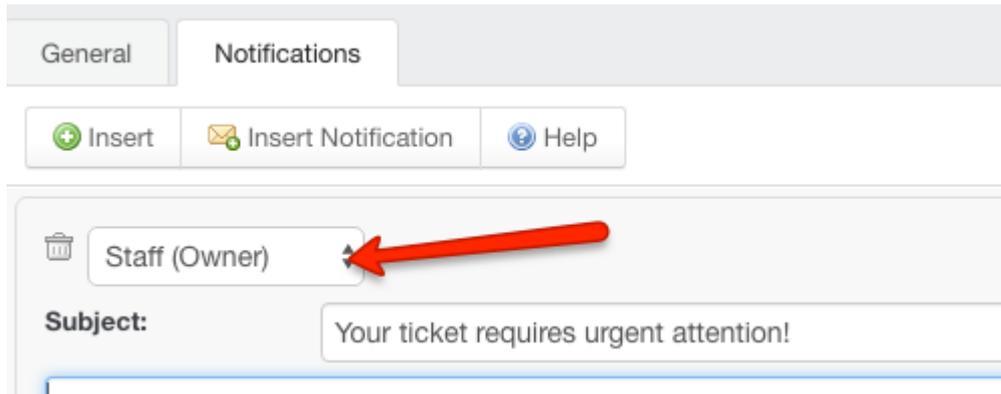
You can also set up broader rules for sending email notifications. Check out our user guide article about notifications to learn more.

General	Notifications
<div style="display: flex; gap: 10px;"> <span>+ Insert</span> <span>🔗 Help</span> </div>	
<b>Rule title</b> Enter a title for the escalation rule, for example: <i>Overdue tickets</i> .	Test Escalation

Screenshot 21: Click Notification tab

8. On this tab, you can insert notification emails for various stakeholders. We are just going to set one up for the staff member assigned to the ticket. Click **Insert Notification**.

9. Select **Staff (Owner)** from the dropdown.



Screenshot 22: Select Staff (Owner)

10. Fill out the Subject field with the subject line for the email, and add the body of the message in the text area below.

11. Next, switch back to the **General** tab.

12. Review your escalation and click **Insert** to save and activate it.

A new SLA is created!

### 3.2.2 Advance support tickets

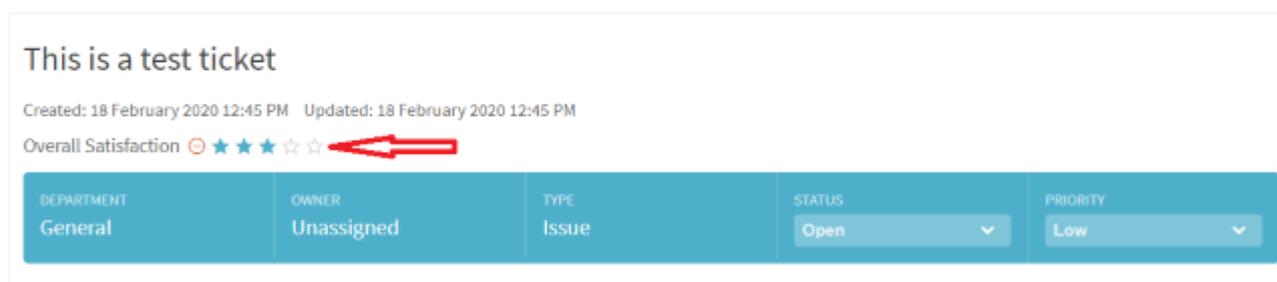
This sections has information about the advanced support tickets settings.

#### Overall satisfaction rating

Customers can rate their overall satisfaction (represented by the stars) on their tickets while the ticket is still open. This topic provides information about the overall satisfaction rating in GFI HelpDesk and the process to configure it.

When a customer manages their tickets in your Help Center, they have an option to provide an overall satisfaction rating within the ticket itself, as shown in the screenshot below).

#### View Ticket: #1358



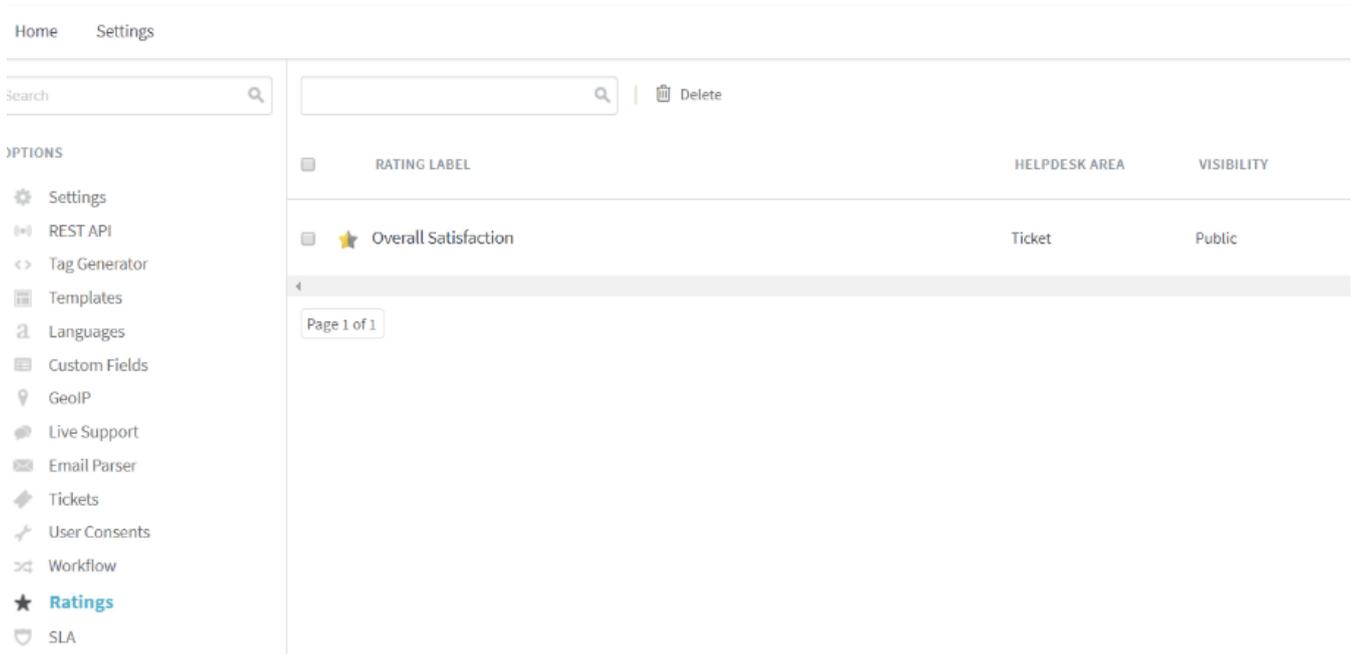
Screenshot 23: Overall satisfaction rating

The customer can rate the overall satisfaction by marking the stars while the ticket is still open. This rating is different from the survey that is being sent out when the ticket is marked as closed. It is critical to note that the responses to this rating are not logged in the audit logs and are only visible on the sidebar information of the ticket.

You cannot disable the Overall Satisfaction rating. However, you may configure it in the admin panel by following the process described below:

1. Log in to your admin control panel.

2. In the **Options** section, select **Edit the rating settings as per your requirements**, click **Save**, and then click **Overall Satisfaction**.



Screenshot 24: Navigate to the Overall satisfaction screen.

3. Edit the rating settings as per your requirements, and then click **Save**.

EDIT RATING: OVERALL SATISFACTION
✕

General
Permissions (Staff)
Permissions (User)

**Rating label** Overall Satisfaction

For example, *Overall satisfaction* or *Speed of resolution*.

---

**Display order** 1

Multiple ratings can appear in the same location. They will be displayed according to their display order number, smallest to largest.

---

**Who can submit a rating?**  Public  Private

**Public** Ratings are available to all users. Select this option if you want to collect feedback from your end users and have the ratings visible to staff too.

**Private** Ratings are available only to your staff users, for internal rating purposes.

---

**Allow modification after first submission**  Yes  No

The value set for this rating can be modified, if enabled.

---

**Prevent staff from setting values for this rating**  Yes  No

Only end users will be able to set values for this rating if enabled.

Save
Cancel

Screenshot 25: Overall satisfaction edit screen

## Setting up recurring tickets

Scheduling regular tasks for your staff is an integral part of building up your organization's day-to-day operations. With GFI HelpDesk, you can automate and streamline this process by setting up recurring tickets.

For each recurrence, you can configure the ticket's content and properties, how often it recurs, and a beginning and end date.

Once created, GFI HelpDesk automatically creates and assign a new support ticket using the content you provide, at the time you've chosen.

This topic explains how recurring tickets work, and then walk you through the steps to create your first recurring ticket.

---



---

## Understanding how recurrence works in GFI HelpDesk

You can use recurring tickets to automatically create a series of identical tickets at whatever time interval you choose. For example, let us say your team is required to submit performance reports to a particular customer every couple of weeks.

You can create and assign a recurring ticket to a staff member, prompting them to run and send that report every other Monday.

Creating a recurring ticket starts just like creating any ticket, with the additional step of scheduling the ticket creation to happen at regular intervals. You'll have the option to choose from the following:

- » **Daily** – repeat the ticket every specified number of days or every weekday.
- » **Weekly** – repeat the ticket every week (or another week, or three weeks, etc.) on the days of the week you choose.
- » **Monthly** – repeat the ticket on a particular day of the month (for example '22nd' or 'first Tuesday').
- » **Yearly** – repeat the ticket annually on a particular day of the year.

The rest of the ticket-creation process is identical to creating a normal, one-off support ticket. You define the ticket's properties and content just as you would otherwise. But the options you choose on the Recurrence tab tells GFI HelpDesk when and how often to create an identical ticket.

Now that we've covered what recurring tickets can do, let us go through the process of actually creating one.

### Setting up recurring tickets

Each recurrence starts by creating a new ticket, and setting the configuration options on the Recurrence tab.

**Note:**

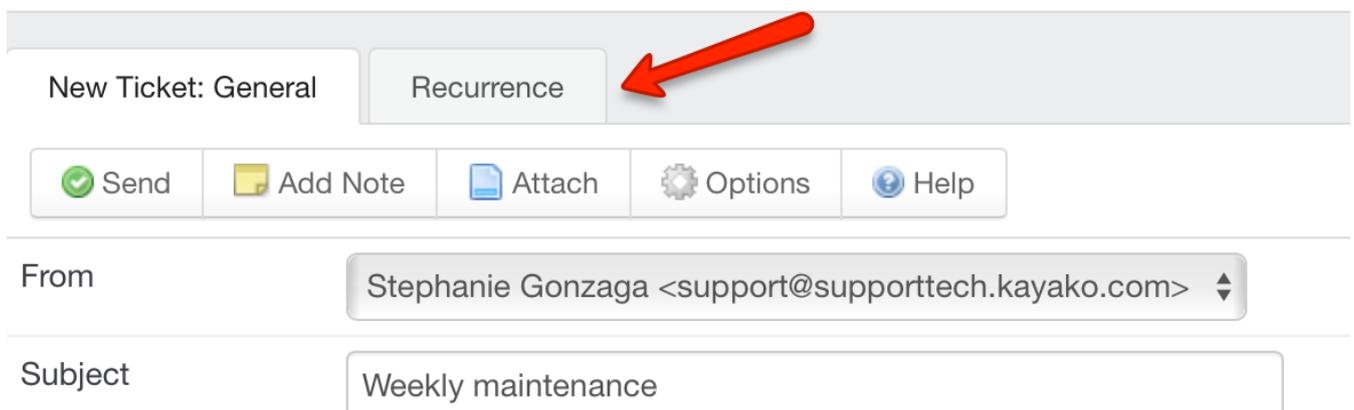
To create recurring tickets in GFI HelpDesk, you need a staff account with the 'Recurrence' permission.

1. Sign into the staff control panel.
2. Click **Tickets** in the main menu and select **New Ticket**.
3. Select the **Send an email** option.

**NOTE:**

This option sets you as the creator, so no autoresponder is sent to a user.

4. Select the **Department** for the ticket it belongs to.
5. Click the **Next** button to start editing the ticket contents.
6. Add an 'email address' to the **To** field for any staff member who should get an email when this ticket is created.
7. Fill in the 'ticket properties' and 'content' as you would with any other ticket.
8. Switch to the **Recurrence** tab to set the scheduling options for the ticket.



Screenshot 26: Switch to Recurrence tab

9. Choose how often you would like the ticket to recur.

**NOTE:**

When you make a selection, it opens an additional configuration options.

10. Set a 'beginning' and 'end' day for the recurrence.

11. Click the **Send** button to create your first ticket, and schedule future recurrences.

**NOTE:**

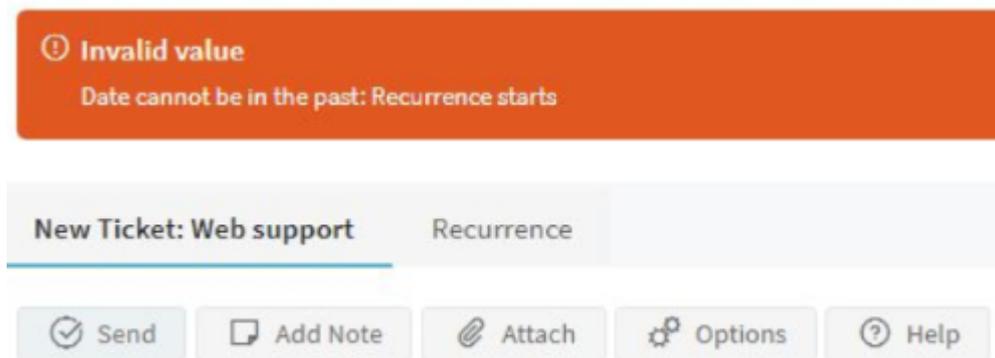
When you hit **Send**, a new ticket is created, whether it follows the recurrence pattern or not.

### Error: 'Invalid Value Date cannot be in the past: Recurrence starts' while creating tickets

At times, while creating tickets, you may encounter the following error:

**Invalid value****Date cannot be in the past: Recurrence starts**

This topic explains what causes the error mentioned above and how to resolve it.



Screenshot 27: Date cannot be in the past error

Two conditions would exist for this error to occur:

» The user is in a timezone that is behind the server's timezone.

For example, the server is on UTC, while the user is on UTC-05:00

» The server is into the next day while the user is still in the current day.

For example, it is 1:00 AM on Tuesday where the server is located. On the other hand, it is 8:00 PM on Monday, where the user is located.

To further illustrate the conditions under which the error occurs, suppose a user selects 10:00 PM on September 25 as the start of the recurrence, while the server is already on September 26 at 3:00 AM. In this case, the error **Date cannot be in the past: Recurrence starts** is likely to appear.

**Note:**

This issue is a known bug in the versions older than GFI HelpDesk 4.93.02.

If you are experiencing this issue and you are using a version that is older than GFI HelpDesk 4.93.02, upgrade to the latest version of GFI HelpDesk.

Download GFI HelpDesk from the following location depending on the required edition:

**Case** [http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk\\_case.tar.gz](http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_case.tar.gz)

**Fusion** [http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk\\_fusion.tar.gz](http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_fusion.tar.gz)

### IMPORTANT!

At times, the issue might persist due to caching issues even after an upgrade was completed.

If the issue persists, try the following troubleshooting steps:

1. Rebuild the GFI HelpDesk Cache.
  - a. Navigate to your Admin control panel.
  - b. Go to **Diagnostics > Rebuild Cache**.
  - c. Once done, log out from GFI HelpDesk and log back in.
2. Clear your browser's cache.

Click on the links below for instructions on how to clear your browser's cache and cookies:

- » [Google Chrome](#)
- » [Internet Explorer](#)
- » [Firefox](#)
- » [Safari](#)

If you are using a browser other than the ones listed above, you can search on Google for the correct steps or consult the browser manufacturer for assistance.

## Customizing messenger icons

This topic provides instructions on disabling default department selection when submitting tickets in Helpdesk portal.

To do this, follow the below steps:

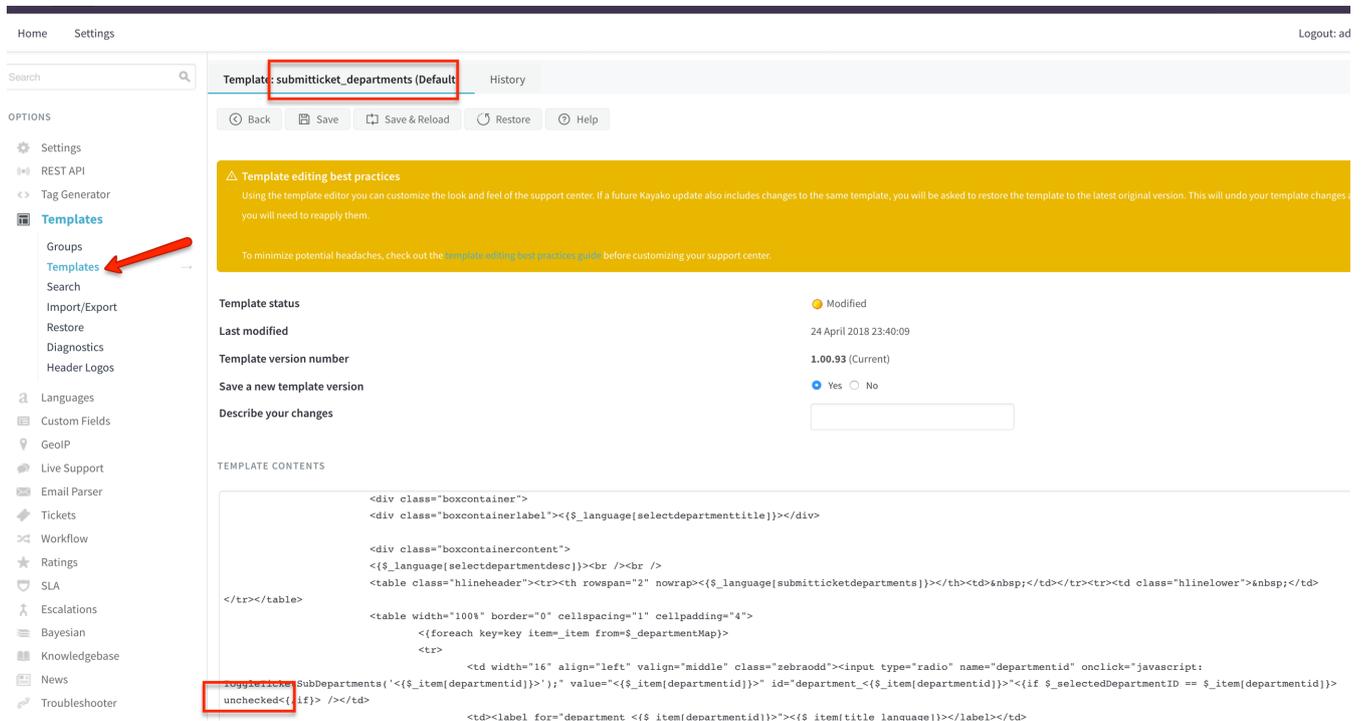
1. Go to the path: **Admin CP > Templates > Templates > Tickets > submitticket\_departments**.
2. Find the following snippet in the template contents:

```
<td width="16" align="left" valign="middle" class="zebraodd"><input type="radio" name="departmentid" onclick=k="javascript:ToggleTicketSubDepartments('{$_item[departmentid]}>');" value="{$_item[departmentid]}" id="d-department_{$_item[departmentid]}"><{if $_selectedDepartmentID == $_item[departmentid]}> checked</if>/></td>
```

3. Replace the above template snippet with the following content:

```
<td width="16" align="left" valign="middle" class="zebraodd"><input type="radio" name="departmentid" onclick="javascript:ToggleTicketSubDepartments('<${_item[departmentid]}>');" value="<${_item[departmentid]}>" id="department_<${_item[departmentid]}>"><{if $_selectedDepartmentID == $_item[departmentid]}> unchecked</if}> /></td>
```

The only update made to the template is the radio input type changed from checked to unchecked.



Screenshot 28: Template: submittickets\_departments (Default)

**Note:**

You may need to choose the proper template group before changing your template.

4. After performing the change, click **Save**.

### Users setting priority for their own tickets

This article guides you on how users can set the priority of their own tickets.

To do this, follow the below steps:

1. Log into the Admin Control Panel and open the Template Group you want to edit.
2. From the **Settings: Ticket** tab, you can set the **User can select a ticket priority** field to **Yes** or **No**.

**NOTE:**

This option is enabled by default.

Edit Template Group: Default

General | Permissions | Settings | **Settings: Tickets** | Settings: Live Chat

Templates | Delete | Restore | Help

**Default department**  
This department will be selected by default on the *submit ticket* page in the support center of this template group. letter requests

**Default ticket type**  
Tickets created from this template group will use this type by default. Task

**Default ticket status**  
Tickets created from or replied to from this template group will be set to this status. If a user replies to a ticket that is associated with this template group, the ticket will be changed to this status. Open

**Default ticket priority**  
Tickets created from this template group will be set to this priority by default. Normal

**User can select a ticket type**  
When creating a ticket, a user can select a ticket type. If not, the default type will be used.  Yes  No

**User can select a ticket priority**  
When creating a ticket, a user can select a ticket priority. If not, the default priority will be used.  Yes  No

Save Cancel

Screenshot 29: Set the **User can select a ticket priority** field

With this option enabled, users are now prompted to select a priority level when submitting their support requests. If disabled, there is no option to choose, and GFI HelpDesk assigns the default priority.

For more information, see [Restricting Users from Setting the Ticket Priority](#).

### Creating tickets on behalf of an existing user

This topic provides the steps to create the tickets on behalf of an existing user.

Follow the steps below to create the tickets on behalf of an existing user.

1. Navigate to the **Staff Control Panel > Select Tickets > New Ticket**.
2. Select **As a user** as the ticket type.
3. Choose the department from the drop-down menu.
4. Click **Next**.
5. You can then log a ticket on behalf of a user by adding his name.

## Setting automatic ticket follow-ups

Staying on top of every ticket in your queue is a difficult task. With follow-ups, you can offload some of that pressure by scheduling ticket replies or updates at any time you specify.

The following are some examples when follow-ups are essential for providing efficient customer support to your customers:

- » A ticket needs a response from your engineering team. You can reply to the ticket saying you will check and get back to them, and then create a follow-up to automatically re-open the ticket in a few days' time.
- » You have resolved a ticket, but you want to make sure your user is getting on alright. You could set a follow-up to automatically email your customer a week after the ticket is closed, to make sure everything is going smoothly.

This topic guides you through the different options available for follow-ups, and the process of creating your own.

## Things You Need to Know

Follow-ups are set on individual tickets. This means that you cannot create or set a single follow-up to be applied to multiple or all tickets in your helpdesk.

The follow-up cannot be set with a dependency condition based on the customer's response to the ticket. For example, you can not set a follow-up to fire when the customer does not respond to the ticket after a certain number of days. This is because the follow-up will fire regardless of any conditions. However, this can be achieved using the Auto-Close rule.

Using Auto-close rules, you can have GFI HelpDesk automatically email your customers if their ticket has been inactive for a certain time, and then automatically resolve the ticket if you still get no response. To learn more about this feature, refer to Resolving Tickets Automatically Using Auto-Close Rules.

You can use the Follow-up function to change the status of the ticket automatically.

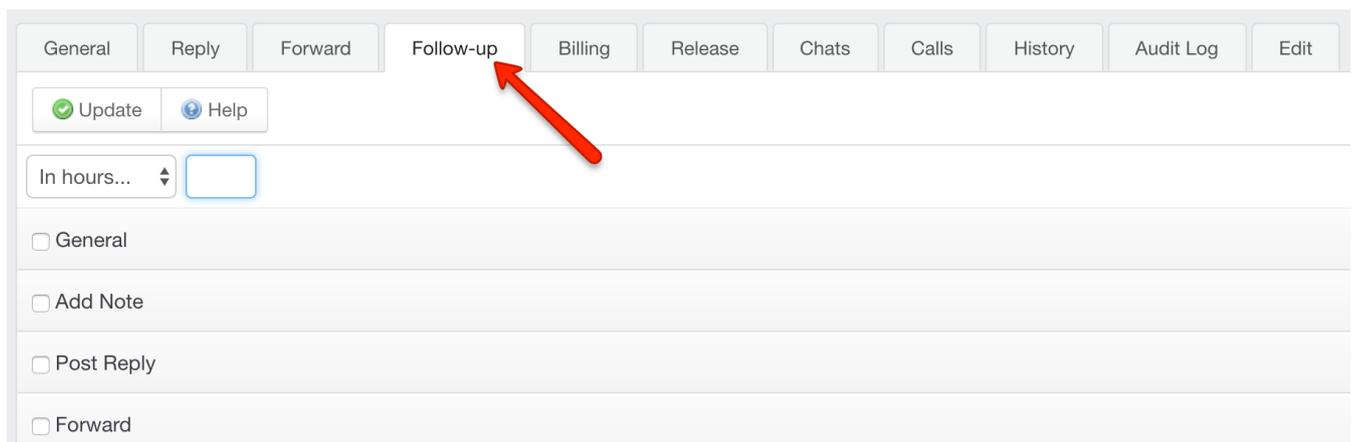
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## Process to Setup automatic ticket follow-ups

To set up automatic ticket follow-up, do the following:

1. You can set a follow-up from any support ticket's Follow-up tab, as shown in the figure below:



Screenshot 30: Follow-up tab

2. Select a time for the follow-up, either by setting it to pop up in a certain number of minutes, hours, days, etc. or simply by selecting a specific date and time.

Screenshot 31: Set date and time for follow-up

Select the actions that you want GFI HelpDesk to perform once the follow-up time, specified in step 2, has reached:

- » The General section allows you to make changes to the ticket DEPARTMENT, OWNER, TYPE, STATUS, or PRIORITY.

Screenshot 32: The general section

- » The Add Note section allows you to add a customized note to the Ticket, User, or User Organization.

ADD NOTE

NOTES

Note type  Ticket  User  User Organization

Screenshot 33: Add note

- » The **Post Reply** section allows you to save a ticket reply that is sent to the user when the follow-up's target time is reached.

POST REPLY

Screenshot 34: Post reply

» The **Forward** section gives you the option to forward the ticket to any email you specify, optionally accompanied by a message.

FORWARD

To

(Email will be sent to first recipient only).

Screenshot 35: Forward section

### Example of Creating a Ticket Follow-Up

This example describes the process of creating a follow-up that must fire after 2 days and reopen the ticket, set it to high priority, and add a note reminding you where you left things.

**Note:**

To set ticket follow-ups in GFI HelpDesk, you need a staff account with the Ticket follow-ups permission.

To set a follow-up on a ticket, follow the steps given below:

1. Sign in to the staff control panel.
2. Open the ticket you want to follow up on.
3. Click the **Follow-up** tab.

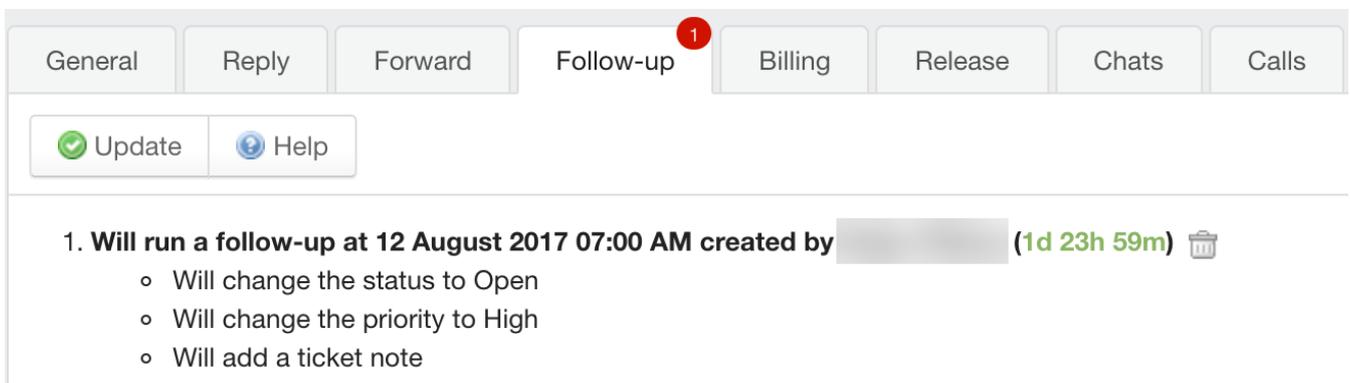
4. Now, set the timeframe. Select In days and enter 2.
5. Check the **General** box.
6. Set the **Status** to **Open** and **Priority** to **High**.

**Note:**

The user can set these options however they like, we are just going through the given scenario of how the user might use follow-ups.

7. Check the **Add Note** box.
8. Add an explanatory note to remind yourself of what attention the ticket needs from you. For example, the user is waiting on a response from the engineering team.
9. Click the Update button on the top toolbar to save it.

**Confirmation:** You are able to see all the follow-ups that you have set on a ticket, as well as their behavior, in the **Follow-up** tab, as shown in the image below.



Screenshot 36: You can view all the follow-ups set on a ticket

**Note:**

Set up an external cron on the server for follow-ups. For more information, refer to [Setting up a server cron or scheduled task](#).

## Resolving tickets automatically using auto-close rules

Using auto-close rules, you can have GFI HelpDesk automatically email your customers if their ticket has been inactive for a certain length of time, and then automatically resolve the ticket if you still get no response.

This means your team won't have to lift a finger to prompt customers who have fallen silent, or clear their tickets out of the queue, when that silence stretches too long.

In this topic, we'll walk you through how auto-close rules work, and then walk you through how to set up auto-close for your own desk.

## Understanding how auto-close rules work

You'll manage your auto-close rules from the 'Tickets' menu in the admin panel. When you create a new rule, you'll have the chance to define a few different criteria:

- » **Resolved status** – You can choose any 'resolved' ticket status – standard or custom – to move the tickets to, when the rule closes them.

- » **Inactivity threshold** – This is the first of two-time limits you'll set. If no update is made to a ticket in the number of hours you define here, GFI HelpDesk automatically marks the ticket as inactive.
- » **Closure threshold** – Once a ticket has been marked inactive, GFI HelpDesk then starts counting toward the closure threshold. When the ticket has stayed inactive for the number of hours you define here, the rule sets the ticket to the resolved status you've chosen.
- » **Notifications** – You'll have the option to send customers an automatic email when either the inactivity or closure threshold has been met. You can also customize those messages by modifying the phrases for the auto-close notifications.
- » **Ticket criteria** – You can also limit the scope of the auto-close rule according to tickets' attributes as well, like department, type, status, etc.

Overall, by defining a set of auto-close rules, you can tell GFI HelpDesk to send reminders about and set timers for any subset of your tickets, so your team doesn't have to chase down disengaged customers manually.

---

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### Creating a new auto-close rule

You may want to have a plan for which tickets you want to target with your rule, as well as the thresholds you want to set for inactivity and closure. Once you've got those in hand, you're ready to dive into the instructions.

#### **NOTE:**

To manage auto-close rules in GFI HelpDesk, you need an administrator account with the 'Ticket auto-close rules' permission.

To add a new auto-close rule:

1. Sign into your admin control panel.
2. Under the **Tickets** section, click the **Auto-close** link.
3. Here you can see any rules your team has already configured and the default 'Close tickets after five days if we won't hear back from the customer' rule. Click the **New** button in the upper-right.
4. In the **Rule title** text box, enter a title for this auto-close rule.
5. From the **Change status to** drop-down, select either a default or custom 'resolved' status that you want the rule to move tickets into when it's closed.

#### **NOTE:**

To check whether the status is resolved or unresolved, go to **Tickets > Statuses** in the admin control panel and click a status to review its details.

6. In the **Inactivity threshold** box, specify the number hours after which GFI HelpDesk should mark the ticket as inactive.

7. In the **Closure threshold** box, specify the number of hours after which the ticket should go to the resolved status.

#### **NOTE:**

These thresholds are calculated using calendar hours, not business hours.

8. If you want to send an email to the customer when their ticket hits the inactivity threshold, set the **Send inactivity notification email** option to Yes.
9. If you want to send an email to tell the customer when their ticket is closed, set the Send final ticket closed notification email option to Yes.
10. You can also tell GFI HelpDesk not to send a survey invitation for automatically closed tickets, by setting the **Suppress customer survey email** option to **Yes**.
11. Set the **Rule is enabled** to **Yes** to enable the rule when you save it.

**NOTE:**

You can always come back and change this later.

12. The **Execution order** field gives you the chance to tell GFI HelpDesk which order to execute your auto-close rules, in case you have more than one enabled. The smaller the number you select here, the higher priority it takes.
13. Finally, in the last step, you can specify any criteria by which you want to limit the scope of your new rule. GFI HelpDesk automatically closes only tickets that match the criteria specified here.

**NOTE:**

If you use Ticket status as a criterion, you need to select 'unresolved' statuses.

14. When you're done defining your criteria, click the **Insert** button in the top toolbar to save your new rule.

**Note:**

If you are using the self-hosted version of GFI HelpDesk, set up an external cron on the server for auto-close. For more information, see [setting up a server cron or scheduled task](#).

## Standardizing support procedures with workflows

Many support teams spend a lot of time handling common administrative support requests like equipment purchases or travel budget approvals. These requests go through a predefined set of steps that do not change from one request to the next.

Using GFI HelpDesk workflow feature, you can capture and streamline these procedures, saving your team valuable time and dramatically reducing the occurrence of human error.

Workflows are built to capture each step in a procedure so it can be followed exactly the same way every time, at the push of a button. Whether your process has two steps or a dozen, you can use workflows to keep your team and your tickets on track.

In this topic, you can see how you might use GFI HelpDesk workflows, and then walk you through how to create that example, step-by-step.

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## Understanding how to use workflows

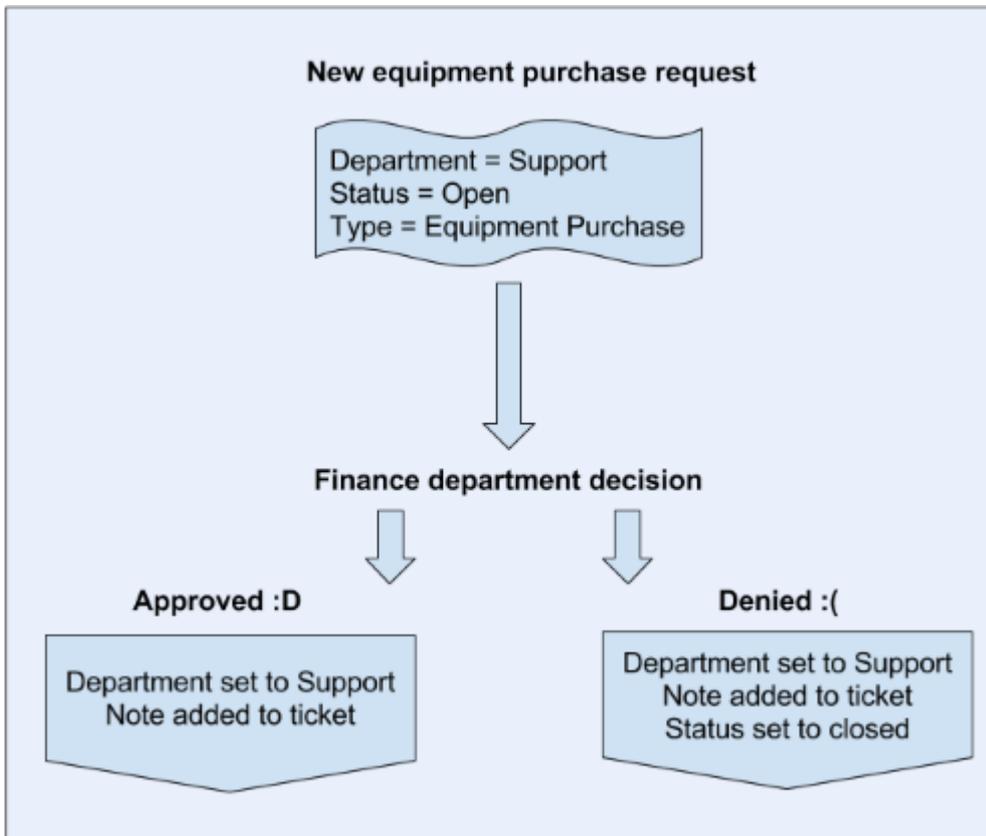
Let's have a look at a specific example of how a team might use workflows so that we can understand how all the pieces come together. We go with purchasing a piece of new equipment since it is a common use case for workflows.

When a new request comes in where someone wants to purchase a new piece of equipment, what steps does it need to go through?

The request goes through two steps:

1. The **Support** department needs to pass it to the finance team.
2. The **Finance** department either approves or denies the funds for the request.

The flow of the issue would look something like this:



Screenshot 37: Flow of the issue

Looking at the diagram, we have a few things going on:

- » There are two main parties involved – a support team member and a finance team member.
- » We have a set of ticket criteria established – open 'equipment purchase' tickets assigned to the support department.
- » And we have three total steps defined:
- » When the issue comes in, the support staff member uses the workflow to assign the ticket to finance.
- » When it lands with finance, they can do one of the following:

approve the request, which returns the issue to support and add a note about their approval,

deny the request, sending it back to support, adding a note, and closing the issue.

In GFI HelpDesk, we can define a workflow for each one of these steps, and limit their visibility based on ticket criteria. Then, every time a purchase request comes in, the support team can move it along to finance with the press of a button, and finance can either approve or deny it.

Now, this example probably is not an exact match for a process in your organization, but you can see how you might start mapping common procedures so they can be standardized with workflows. A great way to get started is to sit down with an actual pen and paper and map out the steps of your real-world processes using flow diagrams. This makes it much easier to determine how many workflows you need and what each of them needs to do.

Read on for step-by-step instructions on how to create a set of workflows that would function as described above.

## Creating a multi-step workflow

To create multi-step workflow, do the following:

- » Build your workflows from the Admin Control Panel.
- » Your team can execute from the staff control panel.
- » When creating a workflow, you can define criteria that tickets must match, before the workflow is available.
- » Then you can choose updates to apply to the ticket when the workflow is executed.

So that you can get a feel for creating a batch of related workflows, we go through the steps for creating each of the three equipment purchase workflows we discussed above.

### **NOTE:**

To create workflows in GFI HelpDesk, you need an admin account with the 'Workflows' permission.

So let's start in on our first workflow!

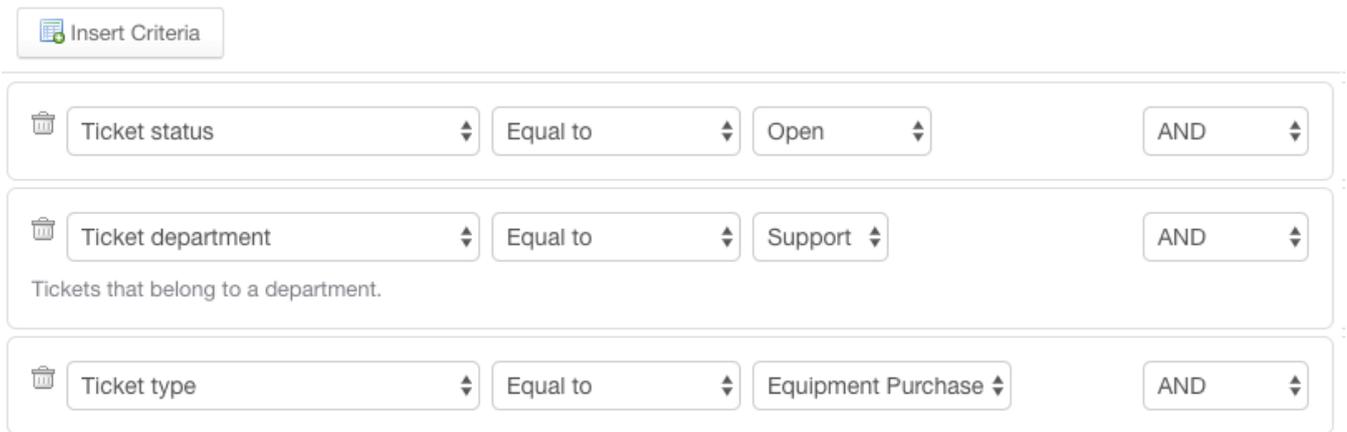
### Workflow 1: Move ticket to finance for approval

1. Sign in to the admin control panel.
2. Click on **Workflow** on the sidebar.
3. Click the **New** button in the upper-right.
4. Add a brief, descriptive title to the Workflow rule label box, like Purchase Request.

### **Note:**

Make sure you use a name that is clear and accurate, as this text is used when your team is executing the workflow on a ticket.

5. Leave Workflow is enabled set to **Yes**.
6. In Display order, you can tell GFI HelpDesk how to sort the workflow in a list, with smaller numbers appearing higher on the list.
7. Now, to add the criteria we want our tickets to match. We want to select for Open tickets in the Support department, of the Equipment Purchase type. Click the Insert criteria button to add each of the three.
8. When you are done, your rule criteria should look like this:



Insert Criteria

Ticket status Equal to Open AND  
 Ticket department Equal to Support AND  
 Tickets that belong to a department.  
 Ticket type Equal to Equipment Purchase AND

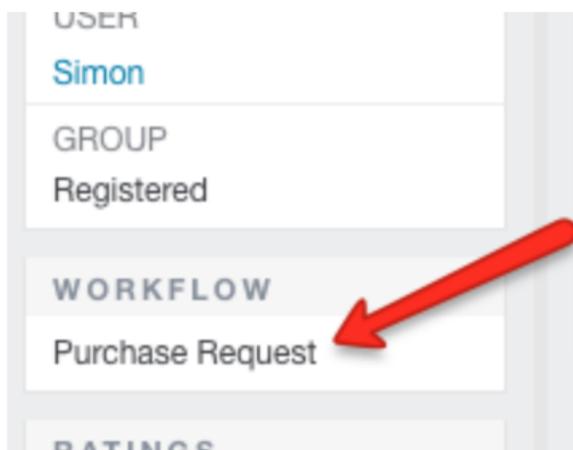
Screenshot 38: Insert criteria

9. Next, add an action for the workflow to perform. In this case, we just want it to move the ticket to the Finance department. Click the Actions tab.

10. From the **Move ticket to department dropdown**, select **Finance**.

11. Now click the **Insert** button up top, to save your workflow.

And that's step one! Whenever a member of the support department is looking at a ticket that matches our criteria, this workflow appears in the left-hand sidebar.



Screenshot 39: Workflows appears in the left hand bar

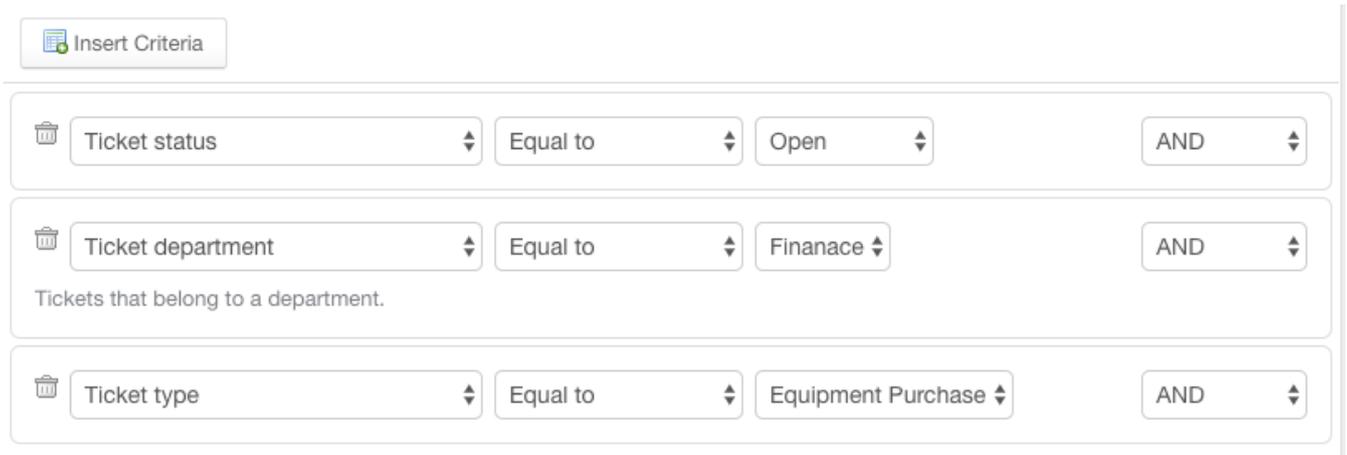
When they click it, the ticket is moved to the finance department. Now let's set up some workflows to help the finance team respond.

### Workflow 2: Finance approves purchase request

Once an equipment purchase request lands in the finance team, we want to make responding as easy as possible for them, so we'll set up a workflow to approve the request and another to deny it.

1. Head to the admin control panel and click **Workflows** in the sidebar again.
2. Click the **New** button.
3. In Workflow rule label box, add a title. Let's go with Purchase - Approval.
4. Enable the workflow, and set a display order.
5. Click the **Insert** criteria button three times, to create our criteria.
6. For this one, we want to specify Open tickets in the **Finance** department, of the Equipment Purchase type.

7. The criteria for your new rule should look like this:



Insert Criteria

Ticket status Equal to Open AND

Ticket department Equal to Finance AND  
Tickets that belong to a department.

Ticket type Equal to Equipment Purchase AND

Screenshot 40: Criteria for new rule

8. Switch to the **Actions** tab. We are going to have this rule move the ticket back to the support department and add a note letting them know the request is approved.

9. From the **Move ticket to department** dropdown select **Support**.

10. In the **Add a note to ticket** text box, type the copy for your note, like "Approved for purchase, enjoy!".

11. Click **Insert** button to save the workflow.

Almost there, we just need to add one more for when finance turns down a request.

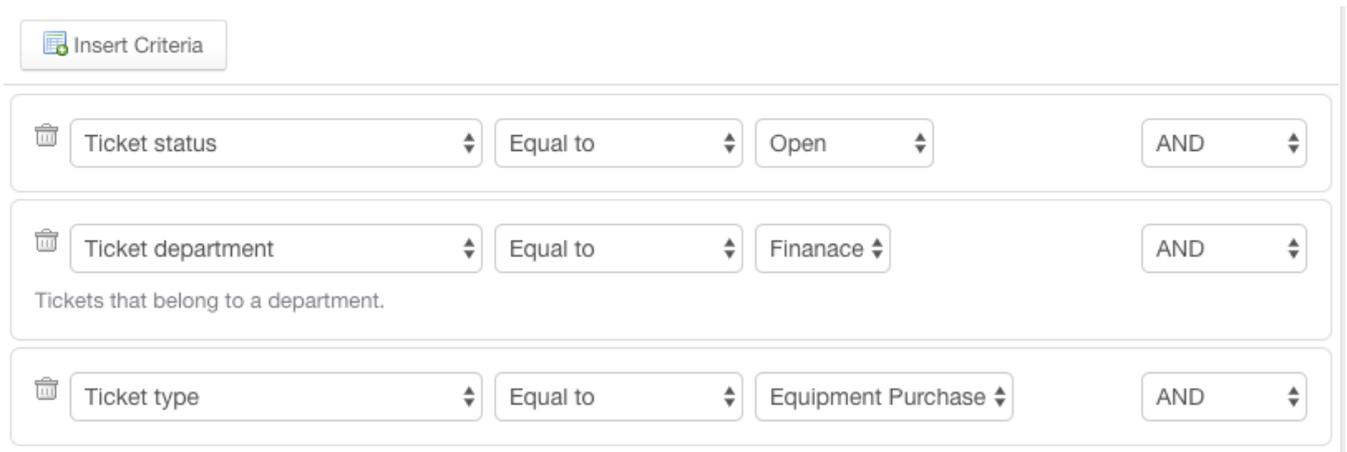
### Workflow 3: Finance denies purchase request

The steps for this last workflow is nearly identical to the approval rule above, with just a few small but important adjustments.

1. From Workflows in the admin control panel, click the New button one more time.

2. For the Workflow rule label, let us use Purchase - Denial.

3. Set the same criteria we used above:



Insert Criteria

Ticket status Equal to Open AND

Ticket department Equal to Finance AND  
Tickets that belong to a department.

Ticket type Equal to Equipment Purchase AND

Screenshot 41: Set the same criteria as in workflow 2

4. Switch to the **Actions** tab.

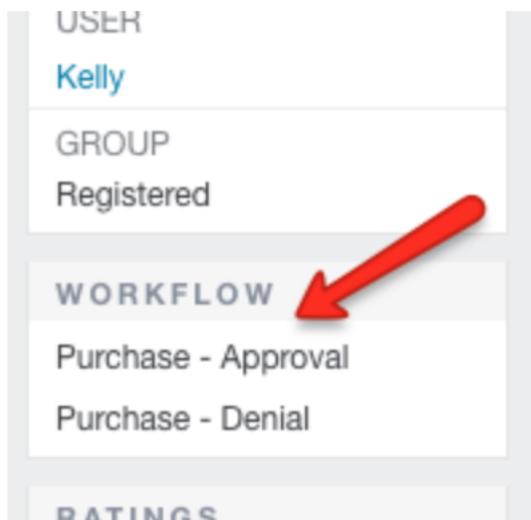
5. From the **Move ticket to department** dropdown select **Support**.

6. In the **Add a note to ticket** text box, add a denial message, like "Sorry, we are not able to approve this request."

7. And finally, for denied requests, we use the **Change ticket status** field to set the ticket to **Closed**.

8. Click **Insert** button to save the workflow.

With these two workflows enabled, any member of the finance department who is viewing an equipment request ticket sees the following in the sidebar:



Screenshot 42: Second workflow also appears in the left pane

So the next time a team lead writes in requests a chocolate fountain to improve team morale, it only takes your support and finance teams a couple of clicks to take their ticket from the queue to here:

As you can imagine, there are many more situations where workflows can come in handy to streamline and standardize your team's practices. Experiment with the criteria available and the possible actions workflows can perform. S

Some of our favorites are emailing notifications to your customers or staff members and tagging tickets to give them extra context.

No matter what your team's procedures look like, GFI HelpDesk workflows are definitely worth exploring.

### Attaching large image files directly to the body of the ticket

When you try to add large image files directly into the body of the ticket, you may sometimes experience performance issues on your helpdesk. The helpdesk may stop responding, and the more images you add, the worse it becomes.

At some point, images finally attach, but the application consumes excessive CPU resources in the process.

This topic explains why this issue is occurring and how to fix it.

When you drag and drop or copy and paste images into the text area, the text editor in GFI HelpDesk (TinyMCE) encodes it as a Base64 or Blob image and uses it as the src attribute for the image tag.

As a result of the image being encoded in this way, the size of your HTML post increases significantly because encoded images are typically far larger than other file formats such as `png`, `jpg`, or `gif`. Therefore, if your content has ten images within it, adding ten encoded images increases greatly the size of the post and the time required to process it.

### JavaScript support in macros for GFI HelpDesk

JavaScript is not supported for creating or editing your macros but you can use the HTML format.

### Editing "Select Department" form description text and GFI HelpDesk templates

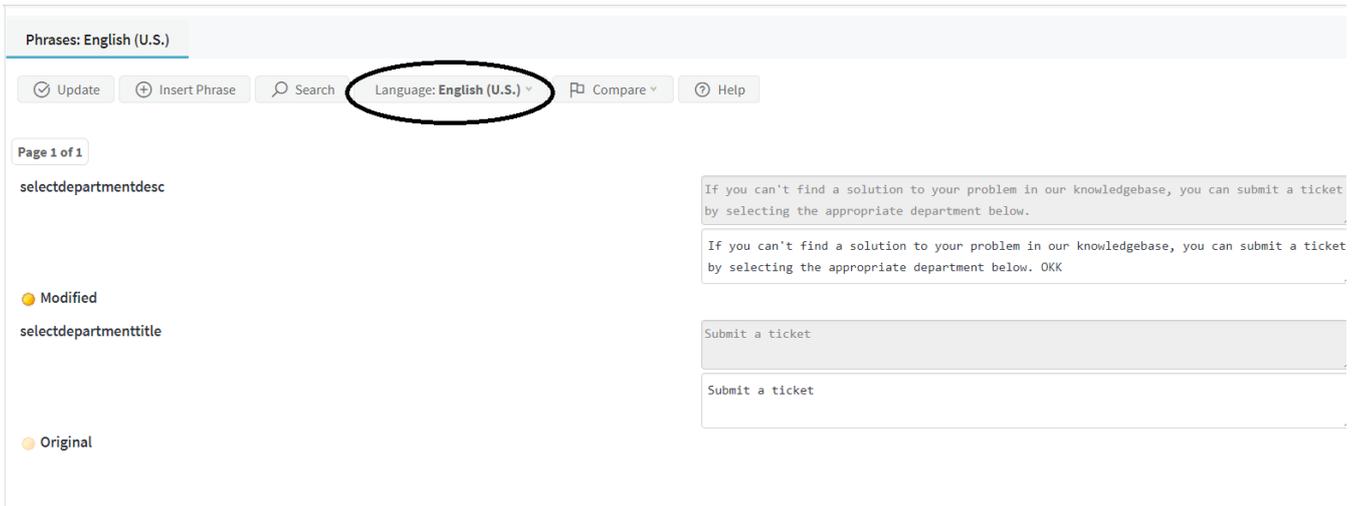
This topic provides the steps to edit the default description of the "Select department" form when submitting a ticket.

The default wording of the description is:

If you can't find a solution to your problem in our knowledgebase, you can submit a ticket by selecting the appropriate department below.

To edit **Select Department** form description text, do the following:

1. Navigate to **Admin Control Panel > Languages > Search**.
2. Enter `selectdepartment` in the **Search Query** textbox.
3. Edit the wording of the contents of the **selectdepartmentdesc** and (or) **selectdepartmenttitle** textboxes. Text can be edited for the language selected from the corresponding drop-down:

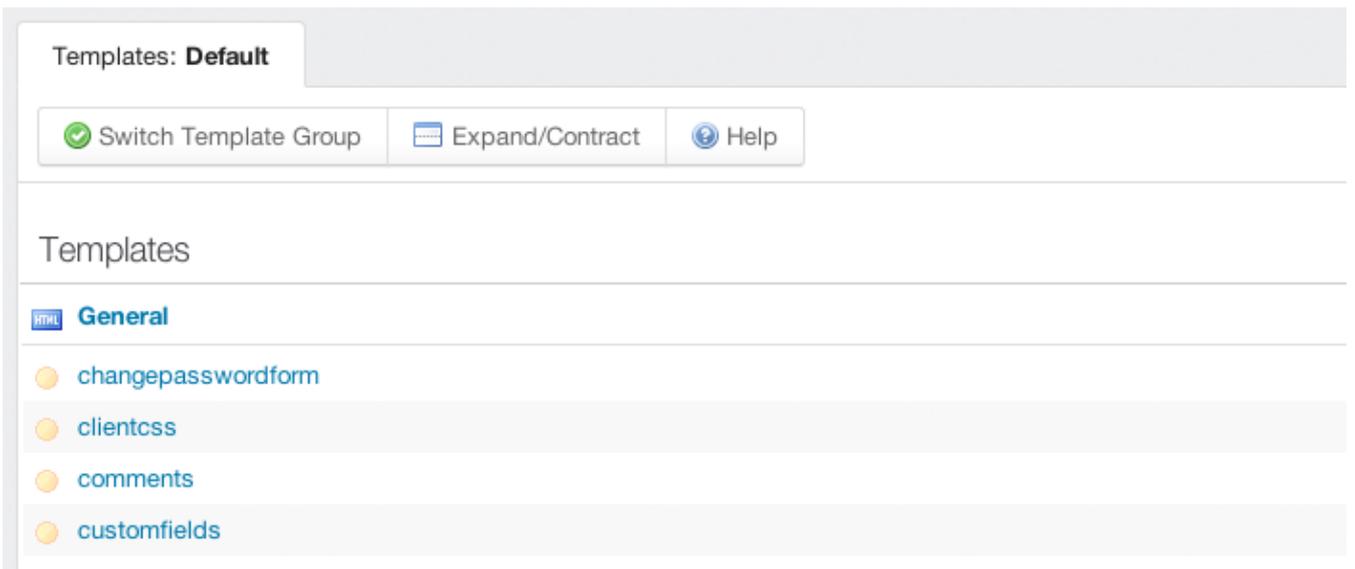


Screenshot 43: Select the language for the text

4. Click the **Update** button to save changes to the template.

## Editing GFI HelpDesk Templates

The support center is put together using a number of templates. For example, there is a template for the header, footer and one for the CSS (`clientcss`).



Screenshot 44: Template for header, footer, clientcss

You can customize the complete look and feel of the support center using the template system. The template system (found in the admin control panel under Templates) lets you modify the style, content and layout of the templates.

## Best practice for editing GFI HelpDesk template

This topic has some of the best practices for editing templates in GFI HelpDesk.

Best practice: Keep track of customizations for template restores

Occasionally as part of an update, GFI HelpDesk may make a change to the support center templates.

When you update your helpdesk, GFI HelpDesk does not automatically apply these changes to your templates. Instead, it marks the respective template as 'out of date' and asks you to restore the template to its original version. Until this is done, the support center does not reflect the latest update to your helpdesk.



Screenshot 45: Templates out of date

The reason why GFI HelpDesk does not do this automatically is to give you a chance to check if you have customized the template that needs to be restored. If you have customized the template, you then have the opportunity to make a note of the customizations made so that you can reapply them once the template has been restored.

GFI HelpDesk saves a history of your template changes. This history is available even if you restore the template. If you click on the History tab when viewing a template, you are able to compare between versions allowing you to easily identify and re-apply your changes.

Find out more about restoring templates at [For more information, refer to Managing your template modifications \(page 149\)](#). and read below to find out about template customizing best practices.

Best practice: Edit as few templates as possible

It is important to consider carefully how to achieve the customizations you want for your support center, and to consider whether modifying the HTML in templates is really necessary.

There are two reasons for which you should modify as few templates as possible:

The more templates you change, the more likely it is you are inconvenienced if GFI HelpDesk makes a change to a template as part of an update (which means that the template would be out of date and would need to be restored to its latest original version and your customizations needs to be reapplied).

The more templates you change, the more difficult it is to isolate any problems.

Best practice: Keep your CSS changes in the 'customcss' template

The customcss template was introduced in GFI HelpDesk 4.60.

All of the CSS for the support center is contained in one template called clientcss.

Because this template covers all of the support center, it is likely that GFI HelpDesk modifies it between helpdesk updates to add new functionality or fix bugs.

Therefore, we suggest that any CSS changes you wish to make should be made in the `customcss` template. We never make changes to this template; it is empty and intended solely for your own custom CSS. It is loaded after **clientcss**, meaning anything in **customcss** overrides **clientcss**.

For example, by default, **clientcss** includes a statement to style the title of knowledgebase articles:

```
.kbtitle
{ font-size: 30px;
font-weight: 200;
}
```

If you wish to increase the font size, rather than modifying this statement in **clientcss**, you should override the statement using the **customcss** template by adding:

```
.kbtitle {
font-size: 40px;
}
```

Because **customcss** is loaded after `clientcss`, the element **kbtitle** ends up with a font-size of 40px and a font-weight of 200.

Try to use CSS rather than editing the HTML

For example, let us say you wanted to hide the author avatar shown on knowledgebase articles. In the template `knowledgebasearticle` you find the following HTML:

```
<divclass="kbavatar"><imgsrc="/Base/StaffProfile/DisplayAvatar/"align="absmiddle"border="0"/></div>
```

Rather than modifying the template directly by deleting this HTML, you could create a new CSS statement in the `customcss` template to hide it:

```
.kbavatar {
display: none;
}
```

## Handling SMTP SSL errors

While working with an external SMTP server, you may receive some SSL errors related to the connection with the server, such as:

PHP

05 April 2018 10:43 PM (9h 33m 2s)

Router: http://support.easysol.net/staff/Tickets/Manage/Index/16543/unassigned/-1/-1/-1/0

fwrite(): SSL: Connection reset by peer (/\_\_

swift/thirdparty/SwiftMailer/classes/SwiftMailer/Transport/StreamBuffer.php:232)

PHP

05 April 2018 10:24 PM (9h 52m 4s)

Router: http://support.easysol.net/cron/Base/CronManager/Execute

fgets(): SSL: Connection reset by peer (/\_\_

swift/thirdparty/SwiftMailer/classes/SwiftMailer/Transport/StreamBuffer.php:165)

PHP

05 April 2018 08:40 PM (11h 36m 14s)

Router: http://support.easysol.net/cron/Parser/ParserMinute/POP3IMAP

fwrite(): SSL: Connection reset by peer (/\_\_

swift/thirdparty/SwiftMailer/classes/SwiftMailer/Transport/StreamBuffer.php:232)

The resolution of these issues is out of the scope of support. You need to contact your email service provider to solve this issue.

You can confirm the usage of external SMTP server from **Admin Panel > Settings > Email > Use an SMTP server to send emails** (if set to 'Yes', it means that you are using the external SMTP server).

#### **NOTE:**

If you set SMTP server to send emails to 'NO', it means that SendGrid server is used.

## Disabling customer satisfaction surveys

This topic provides step-by-step instruction on how to disable customer satisfaction surveys on Tickets and Chats.

### Disabling Ticket Surveys

By default, survey emails are enabled only for the 'Closed' ticket status.

» You can disable the survey emails by navigating to **Admin CP > Tickets > Statuses > Closed > Options > Send satisfaction survey email = No**.

### Disabling Chat Surveys

» Empty the contents of the following phrases from **Admin CP > Languages > Phrases** :

\* chatendednotificationsub

\* chatendsurvey

Survey email/chat is not sent to the user asking for rating and comments.

## Configuring GFI HelpDesk's default autoresponder emails

Autoresponder is the term used for acknowledgment emails dispatched when a new ticket is created in helpdesk.

Follow through this article to learn how you can configure when it should be dispatched, and also modify the content as well as layout.

## Dispatch Settings

The table below shows you where to configure the dispatch settings for each of the ticket sources.

Ticket source	Setting
Tickets created from Support Center	<ul style="list-style-type: none"> <li>» Dispatched per the user group of the active user.</li> <li>» This can be set from the <code>Receives new ticket autoresponder</code> setting for a user group in the Admin interface.</li> </ul>
Tickets created via REST API	<ul style="list-style-type: none"> <li>» The Boolean value set for the <code>ignoreautoresponder</code> POST variable is responsible in case of ticket creation from the REST API.</li> <li>» For Staff API, the Boolean value set for <code>sendautoresponder</code> node in <b>XML payload</b> for creating a new ticket is considered.</li> </ul>
Tickets created from emails	This can be disabled globally for each email queue via the <b>Send new ticket autoresponder</b> setting in the Admin interface.
Tickets created from Staff interface	Users determine whether an autoresponder is dispatched by selecting the <b>Send autoresponder</b> checkbox while creating a ticket. <b>Send Email</b> acts as an email client and only allows staff to send a copy of the ticket content.
On Premise	Clients can tweak default checkbox selection via making custom tweaks to <code>class.View_Ticket.php</code> under <code>...apps\tickets\staff</code> in the document root of helpdesk.

In case you want to nullify the autoresponder for emails received from particular sources or on the basis of certain criteria, you can make use of Pre Parser action set available in **Admin interface > Options > Email Parser > Rules** to disable autoresponder.

If new emails from a source are not triggering an autoresponder, (presuming, you have already cross-checked rules and email queue setting) check loop blockages and fine-tune existing loop blocker rules in **Admin interface > Options > Email Parser > Loop Blockages / Loop Blocker rules**. These rules are designed to prevent loops created by autoresponder/out-of-office emails dispatched from the user's end.

## Modifying Autoresponders

Language phrases in helpdesk contain the content, are referred to in templates and templates, in turn, are responsible for the layout of outgoing emails. Template and language selection is determined via how the ticket has been created.

The templates for autoresponder emails are `email_ticketautoresponderhtml` and `email_ticketautorespondertext` and can be accessed from **Tickets group** under **Admin interface > Options > Templates > Templates**.

Language phrases for a language pack can be searched and modified on the basis of identifier or text from **Admin interface > Options > Languages > Search**.

## Template and Language Selection

The table below shows you where to configure the templates and the language settings for each of the ticket sources.

Ticket Source	Setting
Tickets created from Support Center	<b>Template group</b> accessed by the user and <b>active language</b> determines the language and template selection.

Ticket Source	Setting
Tickets created via REST (Representational State Transfer) API	Value set <code>fortemplategroup</code> POST variable (template group id) and the default language of that template group is used.
Tickets created from emails	Template group linked to email queue from which email is parsed determines the template group to be used. The default language linked with the selected template group is used in case an explicit default language isn't specified for user profile.
<p><b>Note:</b></p> <p>If a default language is selected to user profile from which ticket is created, it is prioritized over default language linked to applicable template group. This can be checked via Language setting under the Profile tab of a user profile from <b>Staff interface &gt; Users &gt; Manage Users</b>.</p>	
Tickets created from Staff interface	<b>User Group</b> of the user and it's linkage to a template group is considered for an existing user. If the user group is not explicitly linked to a template group or a new user is created (via <b>Send Email</b> ), the default template group and its default language are considered.

### Further reading:

- » Refer to the article [Setting up Autoresponders for Different Email Queues](#) for guidelines in setting up autoresponder emails.
- » Refer to the article [Customizing Notification Email Templates](#) for a detailed step-by-step guide in modifying and customizing your autoresponder emails.

### Enabling the rich text editor for ticket replies

To help your staff communicate more clearly, GFI HelpDesk has an option for enabling a rich text editor your staff can use when creating or replying to support tickets. With the text editor enabled, you can fine-tune the formatting of your communications, making it easier to be clear with your customers.

To enable the rich text editor:

1. Log in to the **Admin Control Panel**.
2. On the sidebar, choose **Tickets > Settings**.
3. In the General Ticket Settings section, tick **Yes** of the **Enable TinyMCE Editor** item.

## General Ticket Settings

<b>Include ticket reply summary in staff replies</b> The entire history of the ticket will be included in staff replies (and forwarded tickets) to users.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Enable TinyMCE Editor</b> Use the TinyMCE editor (rich text) for creating new tickets or ticket replies.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Split ticket replies across pages</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No

Screenshot 46: General ticket settings

4. Click the **Update** button on the toolbar to save your changes.

**Note:**

TinyMCE is the name of the rich text editor that Kayako uses. You can learn more about it at [TinyMCE homepage](#).

## Using tags to organize your helpdesk

Keeping your helpdesk organized can be a daunting task. One of the ways GFI HelpDesk can lessen that burden is with tags.

Using keywords to tag related content means you can filter your views to quickly find the information you need. Use tags to filter your tickets and live chats by topic, group users or organizations by industry, or set up any other kind of categorization that your team might need.

Once you create a tag, GFI HelpDesk displays it in a tag cloud in the sidebar, so you can filter your lists with a single click. In this topic, we'll explain how tags work in GFI HelpDesk, where you can use them, and how to start tagging things.

## Understanding how tags work

Tags are a quick and powerful way to keep your helpdesk organized and easy-to-navigate. By tagging content with descriptive keywords or phrases, you can make it much easier for your team to find the information they're looking for – fast.

You can use tags on the following types of GFI HelpDesk content:

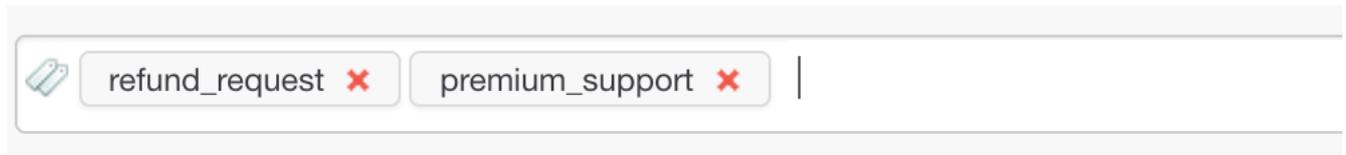
- » Support tickets
- » Live chat conversations
- » Offline messages and surveys
- » User accounts
- » Organization profiles

For each type of content, you'll see a field that looks like this:

Screenshot 47: Type here to insert tag

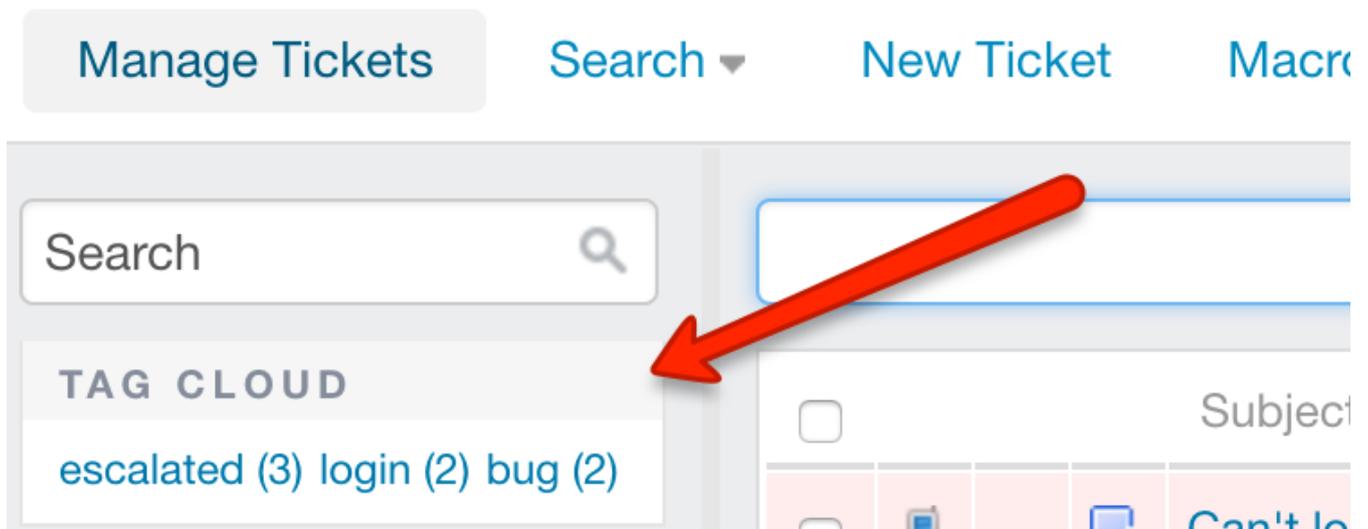
You can type any keyword you want to use. The field searches any tags you've already used, so it's easy to stick to a defined set of tags.

You can also use phrases, but they'll need to be joined together with hyphens or underscores:



Screenshot 48: To insert phrases as tags join with hyphen or underscores

Once you've created a tag on a piece of content, the tag appears in the sidebar of the staff control panel, whenever you're viewing that type of content.



Screenshot 49: Inserted tags appear in tag cloud in the left panel

Clicking on a tag immediately filters the queue – or list of whatever content you're viewing – and only display items with that tag.

**NOTE:**

You can also manually search using tags by typing 'tag:' followed by the keyword.

Now that we've covered the basics, let's walk through how to start tagging your content.

### Tagging support tickets

Tagging tickets is probably the most common use of the feature. It can make navigating your support queue super-fast.

**Note:**

To tag content in GFI HelpDesk, you need a staff account with the **Tags** permission.

To tag a support ticket:

1. Sign into the **Staff Control Panel**.
2. Click **Inbox** on the sidebar.
3. Click on the ticket ID to open the ticket you would like to tag.
4. Click the **General** tab to locate the **Tags** field.
5. Enter the keyword or phrase you'd like to tag the ticket with.

**NOTE:**

Hitting the spacebar or return key creates the tag and let you add another.

The screenshot shows a ticket interface with the following elements:

- General** tab selected.
- Buttons: Update, Add Note, Surrender, Assign, Print, Split, Duplicate.
- Ticket title: "I need help with my subscription"
- Metadata: Resolution due: 1d 16h 17m, Created: 12 July 2017 10:21 AM, Updated: 17 July 2017 03:11 PM
- Table with columns: DEPARTMENT (Support), OWNER (John C. Brown), TYPE (Issue), STATUS (Open).
- Tags input field: "Start typing to insert tags..." with a red arrow pointing to it.

Screenshot 50: Enter your tag keyword or phrase

6. Click **Update** to add the tags to the ticket.

The keyword or phrase you used is now displayed in the tag cloud in the sidebar. You can always remove a tag by editing the ticket and clicking **X** next to the tags you want to remove.

**Note:**

You can add tags to or remove tags from multiple tickets at once, by checking the box next to the tickets, and editing the tags in the **Mass Action** section.

Tagging live chat conversations, offline messages, and surveys

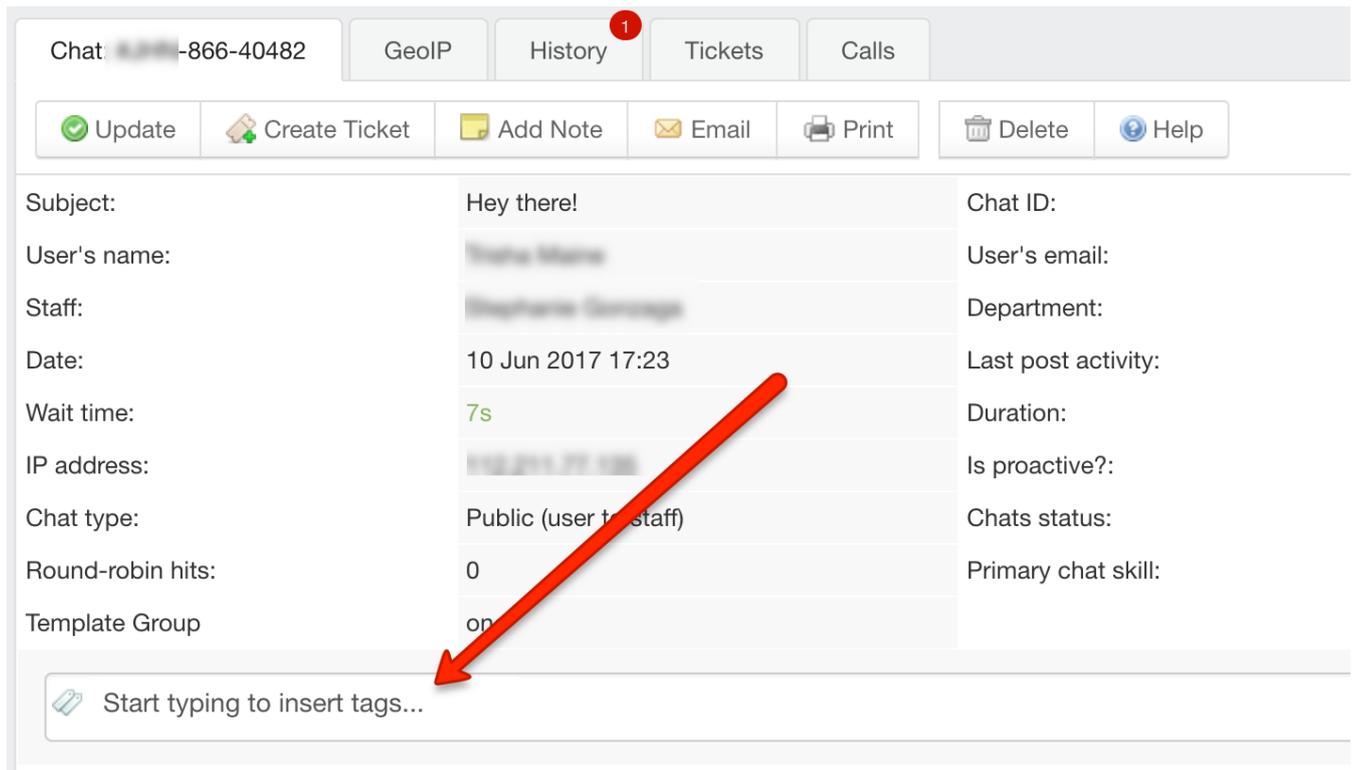
You can use tags to organize both full Live Chat conversations or offline messages and surveys. The steps are almost identical, so we'll cover them both here.

NOTE: To tag content in GFI HelpDesk, you need a Staff account with the 'Tags' permission.

To tag Live Chat content:

1. Sign into the Staff Control Panel.
2. Click **Live Support** on the main menu.
3. To tag a conversation, click **Chat History**, and to tag a post click **Message/Survey**.
4. Click on the chat/message ID to open it for editing.

5. Below the properties section is the Tags field.



Screenshot 51: Tag field

6. Enter the keyword or phrase you would like to use.

**Note:**

Hitting the spacebar or return key creates the tag and let you add another.

7. Click **Update** to add the tags.

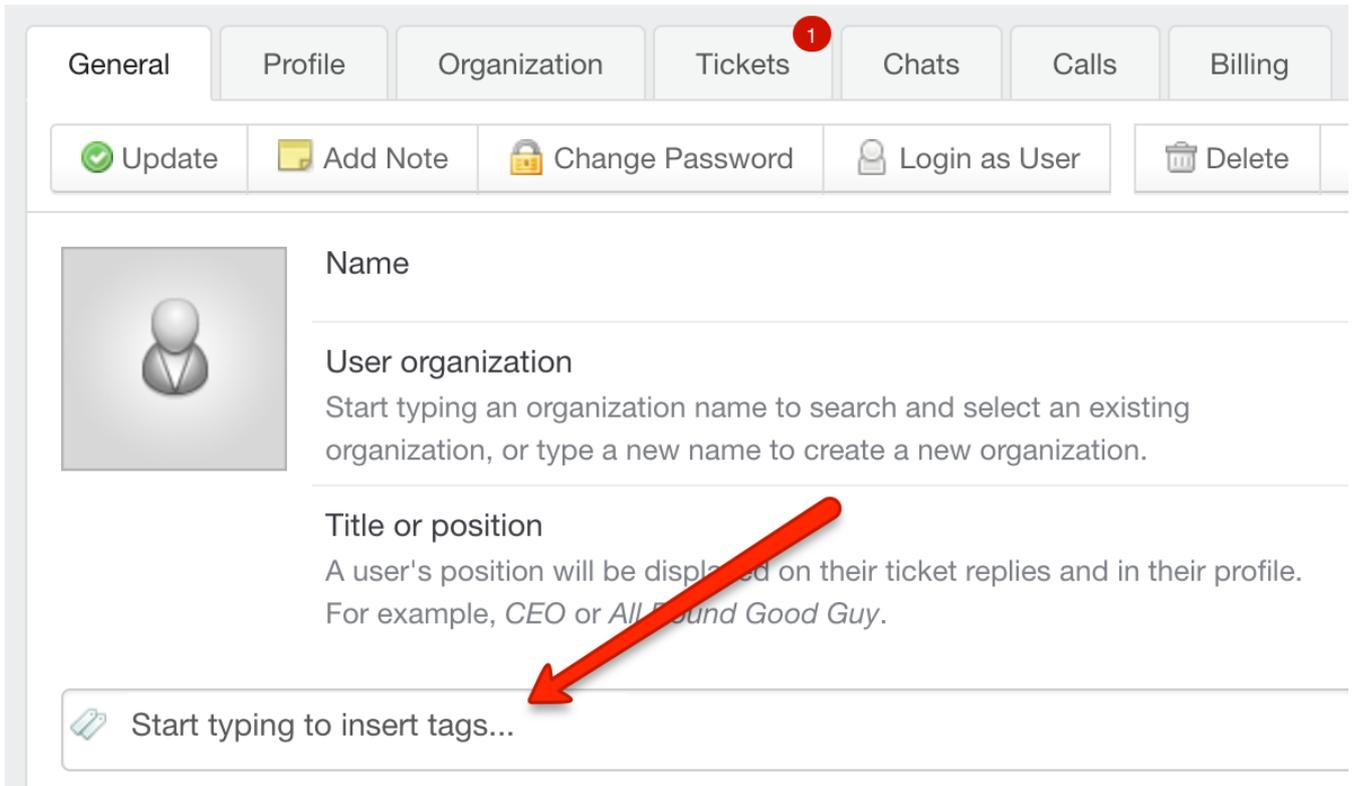
The keyword or phrase you used is now displayed in the tag cloud in the sidebar. You can always remove a tag by editing the chat or message and clicking the **X** next to the tag(s) you want to remove.

### Tagging users and organizations

You can categorize both users and organizations using tags. The steps are almost identical, so we'll cover them both here.

To tag a user or organization:

1. Sign into the **Staff Control Panel**.
2. Click **Users** on the main menu.
3. To tag a user conversation, click **Manage Users**, or to tag an organization, click **Manage Organizations**.
4. Click on the user or organization to open it for editing.
5. Below the user or organization details is the **Tags** field.



Screenshot 52: Tags field

6. Enter the keyword or phrase you'd like to use.

**NOTE:**

Hitting the spacebar or return key creates the tag and let you add another.

7. Click **Update** to add the tags to the user or organization.

The keyword or phrase you used is now displayed in the tag cloud in the sidebar. You can always remove a tag by editing the user or organization and clicking the **X** next to the tag(s) you want to remove.

### Linking related or duplicate tickets

Customers reach out to you for answers to questions, issues, and problems of all shapes and sizes. As your team provides support, they eventually start to see tickets come in that are about similar topics or even duplicate tickets that ask exactly the same question.

To make it easy to compare similar tickets and reuse solutions from resolved tickets, GFI HelpDesk has the option to link related or duplicate tickets. Having that information in easy reach means your team can answer questions and solve issues with speed and confidence.

The steps for linking and unlinking tickets are provided in this article, as well as adding to the types of links you can use.

### Linking related or duplicate tickets

**NOTE:**

A Staff Account with the 'Tickets' permission is required to perform this task.

1. Sign in to the Staff Control Panel.

2. Click **Inbox** on the sidebar.

3. Check the box next to the tickets you would like to link.

The screenshot shows a list of tickets in a table. The first and fifth rows have their checkboxes checked and are highlighted in yellow. Below the table is a 'Page 1 of 1' indicator and a 'Mass Action' section with 'Update' and 'Help' buttons. Below these are several dropdown menus for actions like 'Move to department', 'Assign', 'Change ticket type', 'Change status', 'Change priority', 'Train Bayesian', and 'Link', all currently set to '-- No Change --'.

Checkbox	Attachment	Document Icon	Ticket Title	Priority	Phone Number	Assignee
<input checked="" type="checkbox"/>			Can't log in!		190-62325	Samuel Miller
<input type="checkbox"/>			I need help with my subscription		524-14706	Kelly O'Brien
<input type="checkbox"/>			Hero images aren't showing up		556-33100	Samuel Miller
<input type="checkbox"/>			Client having trouble with google rankings		79-50502	Madge Guden...
<input checked="" type="checkbox"/>			Locked out of our account		782-87095	Kelly O'Brien

Page 1 of 1

Mass Action

Move to department: -- No Change --

Assign: -- No Change --

Change ticket type: -- No Change --

Change status: -- No Change --

Change priority: -- No Change --

Train Bayesian: -- No Change --

Link: -- No Change --

Screenshot 53: Check the checkboxes next to the tickets you would like to link

4. Scroll down to the bottom of the screen to see the **Mass Action** section.

5. Click on the **Link** menu.

The screenshot shows the 'Mass Action' section with the 'Link' menu selected. A tooltip is displayed over the 'Link' menu item, containing the text: '✓ -- No Change -- relates to duplicates was cloned as is derived from'.

Link

Flag

Add tags

✓ -- No Change --  
relates to  
duplicates  
was cloned as  
is derived from

Screenshot 54: Click **Link**

6. Select the type of link that describes the relationship between the two tickets.

7. Click **Update** to link the tickets.

For easy referencing, the link information can be seen on the ticket (the IDs of the linked tickets, the relationship between the tickets, and a one-line summary of any linked tickets).

The screenshot shows a ticket interface with a top navigation bar containing tabs: General, Reply, Forward, Follow-up, Billing, Release, Chats, Calls, and History (with a red notification badge). Below the tabs is a toolbar with buttons: Update, Add Note, Surrender, Assign, Print, Duplicate, Watch, and Flag. The main content area displays the ticket title "Can't log in!" followed by a yellow "relates to" label. A red box highlights a link: "#SBX-782-87095: Locked out of our account (Department: Support, Status: Open) - unlink". Below the link, there is a summary line: "Reply due: 23h 52m 0s Resolution due: 1d 23h 52m Created: 10 August 2017 08:12 AM Updated: 10 August 2017 08:12 AM". At the bottom, a green table displays ticket details:

DEPARTMENT	OWNER	TYPE	STATUS	PRIORITY
Support	Helpdesk	Issue	Open	High

Screenshot 55: The link information can be seen on the ticket

You can remove a link from a ticket by clicking **Unlink** in the header.

### Adding or deleting ticket link types

Add or delete additional types of ticket links, depending on your needs. When creating a new type of ticket link, you must specify a name and a display order.

#### Note:

An **Admin Account** with the 'Ticket links (relationships)' permission is required to perform this task.

To edit the available ticket link types:

1. Sign into the **Admin Control Panel**.
2. Click **Tickets** in the sidebar, and then **Links**. The existing link types are displayed.
3. Check the box next to a type and click the **Trash** button in the toolbar at the top of the screen to delete a type.
4. Click on the **New** button to create a new link type.
5. In the **Link title** box, add a descriptive name for the link type.
6. Add a value for the type's **Display order**, to tell GFI HelpDesk wherein the list it goes.
7. Click the **Insert** button to add your new link type.

## 3.3 User accounts

Learn all about creating, configuring, and managing GFI HelpDesk user accounts.

Topics in this section:

3.3.1 Editing or Deleting Notes for an Organization .....	87
3.3.2 Error: "Staff count exceeded" .....	88
3.3.3 Importing Users from Other CRM or Mailing List .....	88
3.3.4 Merging user accounts .....	89
3.3.5 Editing or deleting notes for a user account .....	89
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3.3.7 Adding customers to an organization automatically .....	91
3.3.8 Creating staff accounts and assigning them to teams .....	91

### 3.3.1 Editing or Deleting Notes for an Organization

Notes are useful when you want to post a special message or instructions for a specific organization.

However, notes can get obsolete, and need to be edited or deleted from the organization. Deleting or editing a note for an organization requires you to go to the organization's profile in GFI HelpDesk.

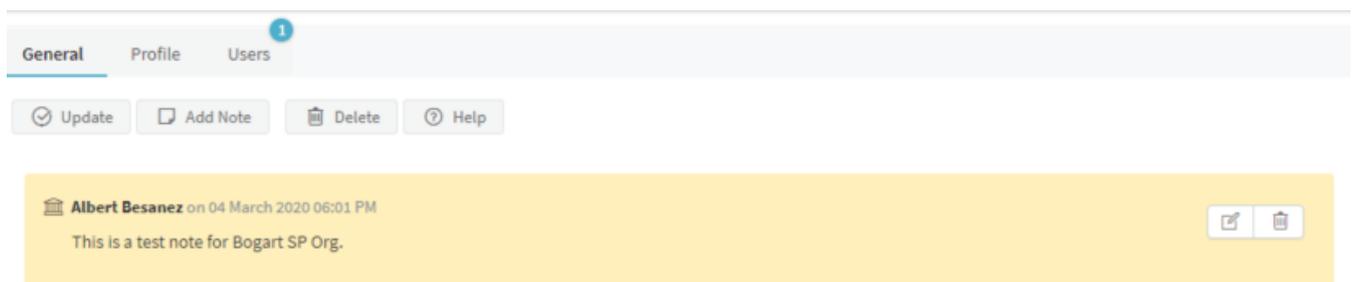
This topic provides the process to edit or delete notes from an organization in GFI HelpDesk.

When you add or create an organization in GFI HelpDesk, you have the option to add a note to the organization.

- » This note is visible (to staff users only) on all tickets created under a user account tagged to the organization.
- » This means that every time a staff user views a ticket from a user account tagged under the said organization, the note is displayed on the ticket.

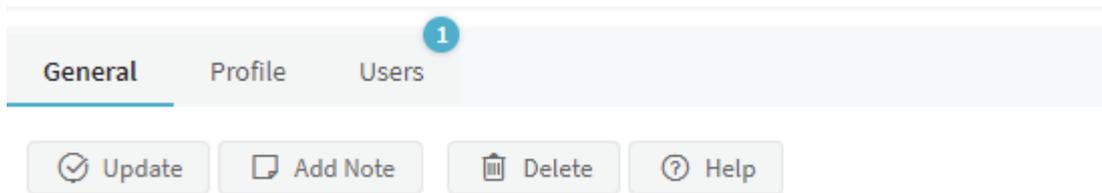
To edit or delete notes from an organization:

1. Log in to your **Staff CP** (that is, <https://<yourdomain>.gfihelpdesk.com/staff>).
2. Click **Users > Manage Organizations**.
3. Search for the **organization** you want to manage. Once located, click it to open the **organization profile**.
4. Under the **General** tab, you can see the note(s) added to the organization. Hover your mouse on to the note you wish to edit or delete.



Screenshot 56: Hover mouse on the note

- » To edit a note, select the edit icon edit.png. On the edit window, enter the new note and click **Save**.
  - » To delete a note, select the trash bin icon trash.png. Click **Ok** on the prompt to confirm the deletion.
5. Once you have finished editing or deleting the note(s), click **Update** to save the changes.



Screenshot 57: Click update

### 3.3.2 Error: "Staff count exceeded"

The number of staff members that you can add to GFI HelpDesk depends on the seats you have purchased. If your staff count exceeds the number of purchased seats, your helpdesk becomes inaccessible and you may receive the following message:

```
Staff count exceeded. (3 > 2). Please contact GFI HelpDesk Support for further assistance.
```

This topic provides instructions to resolve this issue.

Execute the below queries to disable extra staff members from the database:

```
UPDATE swstaff
SET isenabled = 0
WHERE fullname = [Full name of any of your staff members in your helpdesk];
```

```
DELETE
FROM swregistry
WHERE vkey='staffcache';
```

#### **Note:**

Disabled staff accounts do not count in the total seat allocation.

### 3.3.3 Importing Users from Other CRM or Mailing List

Many organizations maintain their clients' or end users' database, and they expect to use the same database in their GFI HelpDesk Helpdesk for the sake of user database integrity. Hence, the option to import the users' database from a different CRM or mailing list is introduced in GFI HelpDesk to facilitate this.

This topic guides you on how to import users from other CRM or mailing list.

#### **Getting CSV file ready**

To import user's database in GFI HelpDesk, the database backup should be in CSV file format.

The format for the CSV file should be as follows:

```
EmailAddress | FirstName | LastName | Organization | Phone Number | Salutation | Designation | Email Domain Filter |
Address | City | State | Postal code | Country | Phone | Fax | Website
```

For example:

jack@abc.com, Jack, Russel, GFI HelpDesk, 9876942040, Mr, Manager, email@organization.com, Sco 123 G.T Road, Jalandhar, Punjab, 144001, India, 01812934839, 01813231432, www.organization.com

**NOTE:**

The first three fields are mandatory. The columns must be comma separated as shown in the above example. They cannot be separated by semi-colon.

### Importing users

Once your CSV file is ready, you can import the users in your GFI HelpDesk from: **Staff control panel > Users > Import Users**.

Choose the CSV file where you want to import the users.

When your import is done, you can check to confirm that the users have been created successfully by going to Staff CP and navigating to **Users > Manage Users and Manage Organizations**.

### 3.3.4 Merging user accounts

Your customers can submit requests using different email addresses. It's possible that duplicate end-user accounts might be created.

While merging several user accounts, one user account should be marked as the primary user account. The primary user account acts as a base of the merged user by retaining all the basic details such as name, phone number, address and company details.

Merging moves all the tickets and contact information from the secondary contact(s) into the primary contact. The secondary contact(s) is deleted after merging and cannot be restored.

Below are the steps to merge contacts:

1. Login to your GFI HelpDesk Staff Control Panel.
2. Click on **Users** in the top menu bar and then click on the **Manage Users** option in the sub menu bar.
3. Select the user accounts you are looking to merge.
4. In the **Mass Action** section, click on the **Merge** tab.
5. Select the **Primary User** in the drop down list and click on the **Merge** button on the top.
6. Your users contacts is now merged.

### 3.3.5 Editing or deleting notes for a user account

When you add or create a user account in GFI HelpDesk, you have the option to add a note to the user account. This note is visible in all the tickets created under that user account to the staff users only.

This means that every time a staff user is viewing a ticket from the said user account, the note is displayed on the ticket.

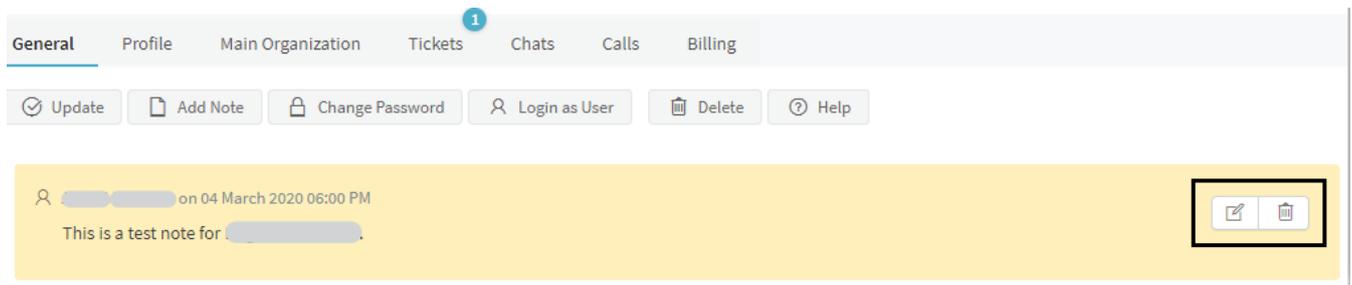
Notes are useful when you want to post a special message or instructions for a specific user. However, notes can get obsolete, and you may wonder how to edit or delete a note.

Deleting or editing a note for a user account requires you to go to the user's profile in GFI HelpDesk.

This topic provides instructions on how to edit or delete notes for a user account in GFI HelpDesk.

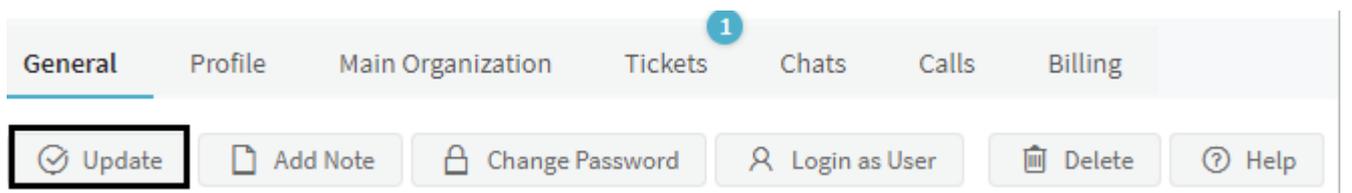
Below are the steps to edit or delete notes for a user account:

1. Log in to your Staff CP (for example, <https://<yourdomain>.gfihelpdesk.com/staff>).
2. Go the **Users > Manage Users**.
3. Search the user account you want to manage and click on it to open the user account profile.
4. Under the **General** tab, you can see the note(s) added to the user account. Hover your mouse on the note you wish to edit or delete.
  - » To edit a note, select the edit icon mceclip1.png. On the edit window, enter the new note > click **Save** when done.
  - » To delete a note, select the trash bin icon mceclip2.png. Click **OK** on the prompt to confirm the deletion.



Screenshot 58: Hover mouse over the note you want to edit

5. Once you are done editing or deleting the notes, click **Update** to save the changes.



Screenshot 59: Click update

### 3.3.6 Changing the staff or admin password through the helpdesk

If you are unable to log in to GFI HelpDesk or getting the Invalid username or password error, you may need to reset the password. Admin users can reset the passwords through the helpdesk.

This topic provides step-by-step instructions on how to change the staff or admin password through the helpdesk.

#### POINTS TO REMEMBER!

- » Only administrators can reset the user's password on the account through the helpdesk.
- » Admin users can reset another admin user's password through the helpdesk.
- » Please contact the support team by clicking the Submit a Ticket button at the top of your support page.
- » Please send us your Order ID or Transaction ID as part of the authentication process.

Follow the below steps to change the password:

1. Log in to your GFI HelpDesk admin console.
2. Go to the Staff tab and click on **Manage Staff**.
3. Select the staff member, or you can use the search bar to find the staff member.



Screenshot 60: Select or search for staff

4. Scroll down to the password section and enter the new password on the **Password** and **Re-enter password** boxes.

**Password**

To change this user's password, enter a new password here. Leave blank to leave the existing password in place.

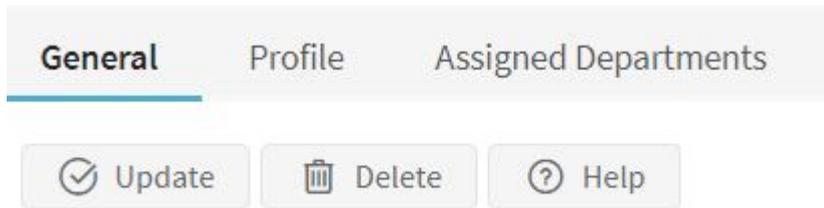
**Password requirements:** Minimum length: 1 characters, Minimum digits: 0, Minimum symbols: 0, Minimum uppercase letters: 0

**Re-enter password**

To make sure there are no typos, please re-renter the password.

Screenshot 61: Enter new password

5. Click the **Update** button at the top to save the changes.



Screenshot 62: Click update

### 3.3.7 Adding customers to an organization automatically

Adding users to a particular organization is helpful if you want to run reports or filter users according to their organization.

You can do so automatically by specifying the email domain name under the Organization. This would mean that whenever a user with that email domain registers at GFI HelpDesk, he would automatically get added to the Organization.

The settings can be found under **Staff CP > Users > Manage Organizations > Select the Organization > General Tab > Email domain filters**.

### 3.3.8 Creating staff accounts and assigning them to teams

Staff user accounts are created and managed within the admin control panel. A staff user account can be a regular staff user account (that has access only to the staff control panel) or it can be an administrator account (that has access both to the staff control panel as a staff user and the admin control panel as an admin user).

Further, the staff user accounts can be categorized in teams to create different access levels, which are also managed within the administrator control panel.

Teams can be assigned permissions which all staff users inherit if specified for the staff user account. Additionally, if specified, a staff user account can have individual permissions and still be a member of a team. All staff user accounts must be a member of a team, and the default two teams are Staff and Administrator.

A staff user becomes an administrator user when added to the administrator team. You may specify the permissions in Admin CP by navigating to **Staff > Manage Teams**.

There are different permissions provided which can be assigned to the staff according to the team type.

For staff team, there are 49 different permissions that are specified regarding the action that are performed in Staff CP.

For the administrator team, there are 66 different permissions that are specified regarding the actions that are performed in Admin CP.

## 3.4 Reports KQL

Get detailed reports of the happenings in your helpdesk with GFI HelpDesk reporting.

Topics in this section:

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3.4.1 Introduction to building and running reports .....	92
3.4.2 Report types in GFI HelpDesk .....	93
3.4.3 Introduction to Kayako Query Language (KQL) .....	98
3.4.4 Advanced reporting using KQL .....	105

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### 3.4.1 Introduction to building and running reports

Reports in GFI HelpDesk lets you access the huge amount of data in your helpdesk and turn that data into useful information.

This topic introduces you to how building and running reports are processed.

#### Accessing and Running Reports

1. Login to the **Staff Control Panel**.
2. Go to **Reports** on the top navigation bar. From here you can access all of your Helpdesk Reports, which can be searched, filtered by category or filter out the reports you have created.
3. Click on a report title to edit, run, export or schedule the report.
4. Click **Run Report** to process the report. The results of the report (if there are any) are rendered in a table.
5. Click **Schedule** to let you specify how often the report should be sent to your email. The schedule (if successfully created) becomes available for editing or removal under the Schedules tab.

#### Creating Reports

Although your GFI HelpDesk Helpdesk comes with a long list useful reports out-of-the-box, unlike other helpdesk reporting systems, GFI HelpDesk allows you to tweak and create your own, almost without limitation.

#### Kayako Query Language (KQL)

The syntax used to define a report. **KQL** is used to specify the data you want to include in your reports and how the data should be displayed. It is flexible and powerful, but still easy to grasp.

See [Report Types](#) for information on the types of report you can generate, and the KQL needed to process it.

#### Report Writer

To get started, simply place your cursor inside of the text editor and start with the first suggestion. You can use your mouse or arrow keys to make a selection. It's as easy as that!

Using **Report Writer**, you can create and modify reports without getting bogged down in syntax.

The Report Writer makes creating your own reports using KQL really simple. It checks what you type on-the-fly and automatically provides suggestions about what you may need to type next. In fact, the auto-completion and suggestions are so comprehensive that you can create reports using just your mouse or up and down arrow keys, so you could create a report without typing or knowing any syntax at all.

Report Writer checks your syntax for errors, providing specific error messages where possible.

### 3.4.2 Report types in GFI HelpDesk

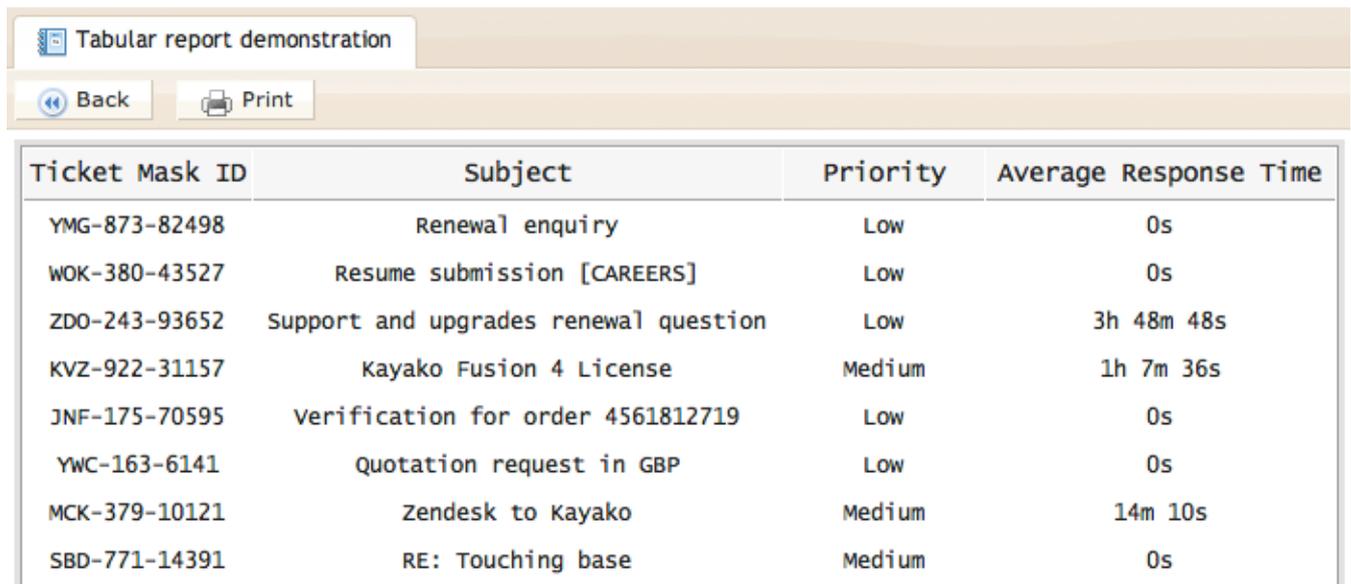
GFI HelpDesk reports are capable of producing various types of report layout. The way a report is displayed depends on how you structure your report query using a KQL statement. This article discusses the different report types available in GFI HelpDesk.

#### Tabular report

The tabular report is the simplest type of report, with a single heading row followed by information. The following KQL statement was used to produce a tabular report.

#### Tabular report example

```
SELECT 'Tickets.Ticket Mask ID','Tickets.Subject','Tickets.Priority',  
'Tickets.Average Response Time' FROM 'Tickets' WHERE 'Tickets.Status'='Open'  
AND 'Tickets.Creation Date'='Today()'
```



Ticket Mask ID	Subject	Priority	Average Response Time
YMG-873-82498	Renewal enquiry	Low	0s
WOK-380-43527	Resume submission [CAREERS]	Low	0s
ZDO-243-93652	support and upgrades renewal question	Low	3h 48m 48s
KVZ-922-31157	Kayako Fusion 4 License	Medium	1h 7m 36s
JNF-175-70595	Verification for order 4561812719	Low	0s
YWC-163-6141	Quotation request in GBP	Low	0s
MCK-379-10121	Zendesk to Kayako	Medium	14m 10s
SBD-771-14391	RE: Touching base	Medium	0s

Screenshot 63: Tabular report demonstration

#### Summary table report

The summary table report is intended for use when performing calculations - such as a count of tickets, an average of customer satisfaction ratings and the oldest tickets (maximum values).

The following KQL statement counts all of the tickets in the specified departments, and then groups the counts by the department to produce a summary table. A summary table includes at least one 'GROUP BY' (this is what differentiates it from a simple tabular report).

#### Simple summary table report

```
SELECT COUNT(*)ASTicketsFROM'Tickets' WHERE 'Tickets.Department' IN ('Support','Sales','Billing') GROUP BY'Tickets.Department'
```

Department	Tickets
Billing	3063
Sales	3462
Support	4452

Screenshot 64: Simple summary report test

We can go further than this and add nested groups to the summary table. We can take the same KQL statement as above, and add some more groupings to the end of the statement to break the ticket counts down by department, the priority and then by status.

### Summary table report

```
SELECT COUNT(*)ASTicketsFROM'Tickets'WHERE'Tickets.Department' IN ('Support','Sales','Billing') GROUP BY'Tickets.Department','Tickets.Priority', 'Tickets.Status'
```

Summary report test			
Back		Print	
Department	Priority	Status	Tickets
Billing	Critical	On Hold	206
		Open	1
	Emergency	On Hold	26
	High	On Hold	277
		Open	1
	Low	On Hold	2089
	Medium	On Hold	320
		Open	2
Urgent	On Hold	142	
Sales	Critical	On Hold	45
	Emergency	On Hold	14
	High	On Hold	182
	Low	On Hold	853
	Medium	On Hold	2300
		Open	2
	Urgent	On Hold	65

Screenshot 65: Summary report test

There is no limit to the depth of nests you can include in your report.

### Grouped Tabular Report (Multigroup)

The grouped report (using the **MULTIGROUP** operator) can be used to produce a list of tables within one report and using one statement. For example, you may like to see a list of tickets assigned to Rajiv Sharma, broken down by the day the tickets were created.

### Grouped report example

```
SELECT 'Tickets.Ticket Mask ID','Tickets.Department','Tickets.Owner' FROM 'Tickets' WHERE 'Tickets.Owner'='Rajiv Sharma' AND 'Tickets.Creation Date'= LastMonth()
MULTIGROUP BY 'Tickets.Creation Date':DayName
```

**Friday**

Ticket Mask ID	Department	Owner
OKR-194-4801	Billing	Rajiv Sharma
LRY-645-4683	Sales	Rajiv Sharma
WLG-349-8417	Sales	Rajiv Sharma

**Monday**

Ticket Mask ID	Department	Owner
KTS-420-4341	Sales	Rajiv Sharma
THI-578-7503	Sales	Rajiv Sharma
ZOJ-989-8882	Sales	Rajiv Sharma
GPB-411-2230	Sales	Rajiv Sharma
CQT-553-4508	Sales	Rajiv Sharma
NVZ-912-5587	Sales	Rajiv Sharma

Screenshot 66: Multigroup report test

Matrix Reports

» **Simple matrix report**

A matrix report is a grid report. At its simplest, it contains one row of labels, one column of labels and information in the middle. For example, you could create a matrix report displaying the number of tickets created within each of your department on each day of the last seven days.

**Simple matrix report example**

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Creation Date'= Last7Days() GROUP BY
X ('Tickets.Department'), Y('Tickets.Creation Date':DayName)
```

	Sales	Development	HR	Support	Leads	Receipts
Friday	162		5	9	100	72
Monday	15		8	8	90	98
Saturday	1		1		57	33
Sunday	7	1	3		59	68
Thursday	39	4	9	16	162	169
Tuesday	12		7	10	99	86
wednesday	6	3	7	6	135	89

Screenshot 67: Simple matrix report

The KQL statement of a matrix report must contain an X() and Y() grouping. The X() indicates what is your columns (horizontal) and the Y() indicates what is your labels (vertical).

» **Nested matrix report**

Just like the simple matrix report, a nested matrix report is a grid report. However, you can add additional X() and Y() operators to introduce nesting (or grouping) to the columns and labels.

For example, you could create a nested matrix report similar to the example above. However, as well as just breaking the tickets count down by department day of the week, we can also group the ticket counts by priority.

**Nested matrix report example**

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Creation Date'= Last7Days() GROUP BY X('Tickets.Department'), X('Tickets.Priority'), Y('Tickets.Creation Date':DayName)
```

	Sales			Support		
	High	Low	Medium	High	Low	Medium
Friday	17	50	190	40	200	46
Monday	9	49	135	39	201	33
Saturday	4	16	25	11	45	7
Sunday	8	17	47	5	32	16
Thursday	15	88	151	47	188	49
Tuesday	13	102	167	31	178	35
wednesday	6	71	276	43	197	45

Screenshot 68: Nested matrix report

As another example, rather than just counting tickets created within the last seven days, we can count tickets created in the last month, grouped by week and then by day of the week.

### Another nested matrix report example

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Creation Date'= LastMonth() GROUP BY
X ('Tickets.Department'), X('Tickets.Priority'), Y ('Tickets.Creation Date':Week),
Y('Tickets.Creation Date':DayName)
```

The screenshot shows a report titled "Nested matrix report" with "Back" and "Print" buttons. The main table is a nested matrix with the following structure:

		Sales			Support		
		High	Low	Medium	High	Low	Medium
36	Friday	4	5	98	12	42	13
	Monday	3	8	23	7	52	6
	Saturday	1	5	7	5	16	
	Sunday	3	5	10	1	7	4
	Thursday	2	11	58	8	34	12
	Tuesday	2	58	29	9	36	5
	wednesday	1	20	18	8	89	16
37	Friday	6	15	30	2	40	7
	Monday	2	14	58	12	77	9
	Saturday	1	5	5	4	6	3
	Sunday		3	15	3	11	2
	Thursday	4	18	29	9	41	12
	Tuesday	3	12	89	5	45	9
	wednesday	2	17	195	8	35	11
	Friday	3	10	18	10	38	9

Screenshot 69: Another nested matrix report

There is no limit to the depth of nests you can include in your report.

### 3.4.3 Introduction to Kayako Query Language (KQL)

Your GFI HelpDesk helpdesk contains a variety of out-of-the-box reports, so if you're not comfortable writing your own reports using the Kayako Query Language, don't worry. See our Introduction to building and running reports article for more information.

A line of KQL (a KQL statement) specifies what information to include in your report, on what conditions and how to display the information. Every report in your GFI HelpDesk helpdesk is defined by a KQL statement, and each report can be opened and its KQL statement tweaked or copied as a template for another report.

If you are familiar with SQL, you can treat KQL almost exactly the same (except we have added some Kayako-specific features).

## Basic KQL statement

The most basic KQL statement looks like this:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject' FROM 'Tickets'
```

This example statement is valid contains the complete minimum components required for a report. The result of this report is a list of every ticket and its corresponding ID and subject in your helpdesk.

The statement has two components:

- » **SELECT** - Every statement starts with a `SELECT`. With it, you are telling Reports what fields and information to fetch from your helpdesk.
- » **FROM** - Each `SELECT` is preceded by a `FROM`, which explicitly tells Reports the data sources you wish to use in your report. As we are only using the Tickets source in this example, this is the only one we need to specify.

## Sources and fields

If you're familiar with database terminology, a 'source' is a table and a 'field' is a field.

In the example above we had two things - a source and a couple of fields. Every source has a list of fields.

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users'
```

In this new example, we have the following sources:

- » Tickets
- » Users

And the following fields:

- » Tickets.Ticket Mask ID
- » Tickets.Subject
- » Users.Fullname

Even though you are asked to select a primary source when creating a new report, it is possible to reference multiple sources within your KQL statement. You don't need to worry about the way this source linking is done - it is automatically taken care of. All you need to do is specify the respective FROMs sources for the fields you are `SELECT`ing.

The Report Writer automatically suggests the sources you need to include in your statement.

## KQL fields

For a complete list of tables and fields used in KQL, refer to [KQL tables and Fields \(PDF\)](#).

## Custom fields

Since 4.52 custom fields can be referenced as follows: `'Source . Custom Fields . Optional Group . Field Name'`.

Custom fields can be retrieved in KQL using **CUSTOMFIELD()** function. For example:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname', CUSTOMFIELD('Tickets', *) FROM 'Tickets', 'Users'
```

The **CUSTOMFIELD()** function accepts two optional and one mandatory argument:

- » **Source** (optional)
- » **Custom field group title** (optional)
- » **Custom field title, custom field name** or \*

Thus the above KQL produces a list of all custom fields under the Tickets source. If source is omitted the primary source is used. If custom field group title is omitted a custom field is searched in all groups of source.

The third argument can be custom field title (for example, 'Role'), **custom field name** (for example, '6nvjvi53lbh2') or \* (all custom fields).

It is safe to use `CUSTOMFIELD (Source, *)` if there are no custom fields associated with source.

Currently, custom fields are available for the following sources:

- » Users
- » User Organizations
- » Chats
- » Tickets
- » Ticket Billing

See also the KQL [Condition and Operator Reference](#).

Conditionally selecting information (WHERE)

The example KQL statement used above:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users'
```

Would produce a report that listed every single ticket in the helpdesk, including the ticket ID, subject and user's name. We can refine this report to include tickets that match some specific criteria.

For example, the following KQL statement includes a WHERE and some conditions. It only includes tickets that belong to the Sales department and are set to the status Open:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users' WHERE 'Tickets.Department'='Sales' AND 'Tickets.Status'='Open'
```

### Multiple conditions

The **AND** operator in the example above indicates that tickets must match both conditions. We could also use the **OR** operator to indicate optional conditions. The example below produces a report listing tickets set to the status Open that belong to either the Support department or the Sales department:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Users.Fullname' FROM 'Tickets', 'Users' WHERE ('Tickets.Department'='Sales' OR 'Tickets.Department'='Support') AND 'Tickets.Status'='Open'
```

Because we grouped the department condition in brackets, it gets treated as one condition. This KQL statement contains the following conditions:

- » ('Tickets.Department' = 'Sales' OR 'Tickets.Department' = 'Support')

AND

- » 'Tickets.Status' = 'Open'

A ticket is included in our report only if both of these conditions are met. For example:

Ticket ID	Ticket Status	Ticket Dept.	Included in the report?	Why?
#ABC-123-0001	Open	Sales	✓	Meets both conditions
#ABC-123-0002	Open	Billing	✗	Fails to meet the condition ('Tickets.Department' = 'Sales' OR 'Tickets.Department' = 'Support')
#ABC-123-0003	Closed	Support	✗	Fails to meet the condition 'Tickets.Status' = 'Open'
#ABC-123-0004	Open	Support	✓	Meets both conditions

## Functions

For a list of functions, see the [KQL Condition and Operator Reference](#).

## Shortcuts

For a list of shortcuts, see the [KQL Condition and Operator Reference](#).

## ORDER BY (ordering results)

The **ORDER BY** operator orders information in tabular reports. The following KQL statement produces a list of tickets including the ticket ID, subject and priority. The list of tickets is sorted by priority:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Tickets.Priority' FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' AND 'Tickets.Creation Date'= Today() ORDER BY 'Tickets.Priority'
```

An **ORDER BY** operator can be used with a **GROUP BY** or **MULTIGROUP BY** operator, as follows:

```
SELECT 'Tickets.Ticket Mask ID', 'Tickets.Subject', 'Tickets.Priority' FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' AND 'Tickets.Creation Date'= Today() MULTIGROUP BY 'Tickets.Department' ORDER BY 'Tickets.Priority'
```

## Grouping results (GROUP BY)

The **GROUP BY** operator groups results together. Its main purpose is for use in a summary table type of report. Whereas a regular tabular report (which would be produced from the example KQL statements up until now) produces lists of information, a summary table consolidates information.

Let's say that we want to count all of the Open in the helpdesk. Our KQL statement would look like this:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' AND 'Tickets.Department'
```

And would produce something fairly basic, which looked like this:

The screenshot shows a report interface with a title bar 'Open ticket count'. Below the title bar are two buttons: 'Back' and 'Print'. The main content area displays a table with one row containing the text 'COUNT(\*)' and the value '22'.

Screenshot 70: Open ticket count

Using **GROUP BY** we could break this count down by department, so we'll retrieve the count of **Open** tickets across our departments. The revised KQL statement is:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'='Open' AND 'Tickets.Department' GROUP BY 'Tickets.Department'
```

And would produce a report which looked like this:

Department	COUNT(*)
Billing	3
Sales	5
Support	13

Screenshot 71: Grouped by department

It is possible to **GROUP BY** multiple fields to break the summary table report down into even more detail. The following KQL statement will **GROUP BY** ticket department and then by priority:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'='Open' AND 'Tickets.Department' GROUP BY 'Tickets.Department', 'Tickets.Priority'
```

Department	Priority	COUNT(*)
Billing	High	1
	Medium	1
Sales	Emergency	2
	Low	4
Support	High	2
	Low	4
	Medium	4

Screenshot 72: Grouped by multiple fields

For more information on report types and layouts, see [Report Types](#).

**GROUP BY X(), Y()** for matrix reports

Since 4.52 **X()** and **Y()** are also supported as post-modifiers, for example, `GROUP BY 'Tickets.Department' ) X, 'Tickets.Owner' Y`.

In order to produce a matrix report (see [Report Types](#)), a KQL statement must specify a **GROUP BY X(), Y()** (because each matrix report has at least one row of headings and one column of row labels).

For example, the following KQL statement produces a matrix report showing the count of Open tickets in departments (X, the headings) against ticket owners (Y, the rows):

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' GROUP BY X('Tickets.Department'), Y('Tickets.Owner')
```

Matrix report example

Back Print

	Development	Sales	Support
Drew Lederman	7		
Mahesh Salaria	4		
Jamie Edwards	1	1	
Ryan Lederman	7		
Sandeep Verma			1
Vinay Sharma			2

Screenshot 73: Group by matrix report

We can create a nested matrix report by adding more **X()\*s** and **Y()s** to the **\*GROUP BY**. So, taking the same example above, we can further break the ticket counts down by priority:

```
SELECT COUNT(*) FROM 'Tickets' WHERE 'Tickets.Status'= 'Open' GROUP BY X('Tickets.Department'), X('Tickets.Priority'), Y('Tickets.Owner')
```

To produce:

Matrix report example

Back Print

	Development			Sales	Support		
	High	Low	Medium	Low	High	Low	Medium
Karan Bhagat						1	1
Mahesh Salaria	2	1	1				
Rajan Masih				1			
Ryan Lederman	1	2					

Screenshot 74: Matrix report example

### MULTIGROUP BY

The **MULTIGROUP BY** operator is used to produce a list of tables within one report. For example, to the following KQL statement produces a list of user organization's phone numbers, **MULTIGROUPed BY** country:

```
SELECT 'User Organizations.Name', 'User Organizations.Phone', 'User Organizations.Country' FROM 'User Organizations' MULTIGROUP BY 'User Organizations.Country'
```

Multigroup report example

Back Print

## Uganda

Name	Phone
Sunflower Technologies Ltd	+256791234569

## Ukraine

Name	Phone
Host Consult	+300(34)0092267
AIC Ltd.	
Markate1 Ltd.	+300(67)1239549

Screenshot 75: Multigroup report example

A **MULTIGROUP BY** cannot be used with the **GROUP BY** operator.

Specifically, the **MULTIGROUP BY** operator is used to produce grouped tabular reports. For more information, see [Report Types](#).

## Selectors

For various value types, we have implemented a feature called Selectors. Selectors are best demonstrated by an example:

```
SELECT AVG('Chats.Wait Time') FROM 'Chats' WHERE 'Chats.Type'='User' AND 'Chats.Creation Date'= ThisMonth()  
GROUP BY X('Chats.Creation Date':MonthName), Y('Chats.Creation Date':DayName)
```

`Chats.Creation Date` is a value that represents a date.

You can attach various Selectors to this using a colon, following by the selector such as `DayName` and `MonthName`. In this case, these Selectors allow you to select parts of a date or render dates in different ways in your reports, without any complicated syntax.

For a list of Selectors, see the [KQL Condition and Operator Reference](#).

## Variables

Any expression from the `SELECT` clause, for which an alias was defined using the `AS` operator can be referenced from any other clause (except `FROM`) using the syntax `$(Alias Name)`.

## Date and time in reports

There are two types of date and time representations used in the helpdesk:

**Unix time** - Rather than storing dates and times as long text, like '2011-12-01 13:10:22', unixtime is the number of seconds since January 1, 1970. This is how GFI HelpDesk stores date and time values in the helpdesk. It's handy for computers, but not so great for reading.

**Timestamp** - This is a more readable way of representing date and time, and looks like the following: '2011-12-01 13:10:22'.

When a date and time value is selected in a report, all of the calculation is done when the time value is unixtime. When your report is run and the results are displayed, the unixtime is converted to a timestamp.

### 3.4.4 Advanced reporting using KQL

This sections has information about the advanced reporting using KQL.

---

---

#### Optimizing KQL reports

Optimization is challenging, no matter what you are doing, and unfortunately, reporting in GFI HelpDesk is no exception. How to make the process of writing, rendering, and processing reports most effective?

Today, these questions concern a majority of the users working with reports in GFI HelpDesk.

Optimizing KQL (Kayako Query Language) reports is a set of actions aimed at improving the speed of report rendering and reducing memory usage. To optimize your report performance, you need to know the right tools, and how to focus on the target result set which you want to see.

#### Understanding how reports work?

With the KQL reports, it is essential to know that it fetches data directly from the database; thus, it uses MySQL and server resources to fetch any results. So, the only way to make a query run faster is to reduce the number of calculations that the software (and, therefore, resources) must perform.

The optimization here lies in two directions: increasing the speed of report rendering and reducing memory usage.

#### Optimizing KQL reports

To increase the speed of rendering reports, it is necessary to request only needed data from large databases. That is, if for the report, you need results only from a given time range, then there is no need to fetch all the data available in the database. Otherwise, a huge amount of resources is spent on it to get all the data, not to mention the time spent. So, you need some understanding of how MySQL makes calculations.

The following section describes the basic statements that must be checked before moving on to query plans:

#### **SELECT \***

Using the **SELECT \*** statement is only recommended when you want to use all of the data returned by this statement. For example, if you are using a KQL query like:

```
SELECT * FROM 'Tickets'
```

This not only fetches all the fields from the Tickets table but also put additional load on the MySQL server and add to the time required to complete this query. Instead, you should only call the required fields, as shown in the following example.

```
SELECT 'Tickets.Ticket ID', 'Tickets.Subject', 'Tickets.Department' FROM 'Tickets'
```

#### **WHERE**

It is always logical to use a **WHERE** construction in KQL. In case you do not need all the fields and records from a table,

etc., but only the ones corresponding to specific conditions. This applies a positive effect on performance. So, it is always suggested to add your conditions under the WHERE clause of the report like this:

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General'
```

In this sample query, you are telling GFI HelpDesk to fetch results only from a specific department. Thus, the system only looks at the results under that department instead of the entire database.

To find more useful conditions and operators, see [KQL Condition & Operator Reference](#).

## **MKTIME**

When filtering the report's data and minimizing the data set that needs to be queried, the time ranges play an important role. For example, if you are running reports for data older than a month, you can use the MKTIME function to limit the scope of your report. The following report helps you limit the time range for your report and reduce its load time:

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General' AND 'Tickets.Creation Date' <= MKTIME('0','0','0','20','9','2017') AND 'Tickets.Creation Date' <= MKTIME('0','0','0','3','31','2017')
```

This function becomes highly useful when you are running reports for large data sets. For example, you want to query all the data since 2010; you can use the MKTIME function to break into 6 reports and reduce the time taken to run this report. The MKTIME function accepts a date in the following syntax:

```
MKTIME('hour','minute','second','month','day','year','is_dst');
```

### **NOTE:**

The parameters of the MKTIME ( ) function should be added in single quotes in GFI HelpDesk 4.93.01 and above. For further information, refer to [MKTIME](#).

## **LIMIT**

Again, this is one more useful function to set limits to the scope of your report and avoid processing too many records.

For example, you are fetching results from a very high-volume system where thousands of records are created every day. And even after using all the conditions and filters, the report is taking too long to run; you can use the LIMIT function to break the results into parts, as shown in the example below.

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General' AND 'Tickets.Creation Date' = Today()  
LIMIT 100 OFFSET 0
```

This report gives you only the first 100 rows from the total results. To continue fetching the remaining records, you can increment the offset like this:

```
SELECT 'Tickets.Ticket ID' FROM 'Tickets' WHERE 'Tickets.Department' = 'General' AND 'Tickets.Creation Date' = Today()  
LIMIT 100 OFFSET 100
```

## **KQL matrix reports are broken after an upgrade**

If you upgraded your GFI HelpDesk to version 4.93.01 and try to run a matrix report, you may notice issues such as:

- » Report not generating an output or no data is showing
- » Report is producing blank pages
- » Report does not run on schedule
- » Report is showing as HTML content instead of an Excell format

This issue is a known bug in GFI HelpDesk 4.93.01. This topic provides information on how to fix this issue.

If you are using GFI HelpDesk 4.93.01, then you are likely to encounter this issue since it is a known bug on this version which was fixed in GFI HelpDesk 4.93.02 and higher versions. So to resolve this issue, you need to upgrade your helpdesk to the latest version available.

To upgrade to the latest version of GFI HelpDesk, visit the [Upgrading or Downgrading Your GFI HelpDesk](#).

## KQL condition & operator reference

GFI HelpDesk reports gives you the power to define the various types of functions and operators in your KQL statement to get the required information from your helpdesk data.

Almost all of the MySQL functions and operators can be used along with your own custom fields in GFI HelpDesk.

In this topic, we'll walk you through the different categories of KQL functions and operators along with sample KQL statements.

The KQL functions are categorized in the different categories based on their usage in the report.

### Conditions and Operators

Operator	KQL Example	Results
=	SELECT 'Chats.Chat ID' FROM Chats WHERE 'Chat.Department'='Technical Support'	Report to include all past chats that belongs to the Technical Support department.
!=	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Department'!='Sales'	Report to include all tickets that DO NOT belong to the Sales department.
IN	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Department' IN ('Sales', 'Support', 'Billing')	Report to include all tickets that are in one of the following departments: Sales or Support orBilling.
NOT IN	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Status' NOT IN ('Closed', 'In Progress')	Report to include tickets that are not set to the statuses <b>Closed</b> or <b>In Progress</b> .
LIKE	SELECT 'Users.Fullname', 'Users.User Organization' FROM 'User Emails', 'Users' WHERE 'User Emails.Email' LIKE '%GFI HelpDesk.com'	Report to include all users whose email address matches '%gfi.-com', where '%' means anything value.
NOT LIKE	SELECT 'Users.Fullname', 'Users.User Organization' FROM 'User Emails', 'Users' WHERE 'User Emails.Email' NOT LIKE '%GFI HelpDesk.com'	As above, but includes users where the email address does not match '%hotmail.com'.

Operator	KQL Example	Results
AND	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Department'='Sales' AND 'Tickets.Status'='Open'	Report to include tickets that are in the Sales department and a reset to the status <b>Open</b> .
OR	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Department'='Sales' OR 'Tickets.Department'='Support'	As above, but includes tickets that are in the Sales department or the Support department.

## Numerical operators

Operator	Description	KQL Example	Results
<, >, <=, >=	Less than, Greater than, etc	SELECT 'Tickets.Ticket ID', 'Tickets.Subject' FROM Tickets WHERE 'Tickets.Reply Count' > 5 AND 'Tickets.Creation Date' = LastMonth()	Includes all tickets that have more than 5 replies and were created in the last month.
+, -, *, /	Add, subtract, multiply, divide	N/A	N/A

## Functions

Function	Description	KQL Example	Results
COUNT()	Counts the number of matching results	SELECT COUNT('Tickets.Ticket ID') FROM Tickets WHERE 'Tickets.Creation Date' = Yesterday() GROUP BY 'Tickets.Department'	Produces a count all of the tickets that were created yesterday, grouped by department.
IF()	Checks if a condition is true and produces a result	N/A	N/A

## Custom fields

Function	Description	KQL Example	Results
CUSTOMFIELD()	Returns the value of matching custom field	SELECT 'Tickets.Ticket Mask ID', CUSTOMFIELD(*) FROM 'Tickets' WHERE CUSTOMFIELD('Last check date') = LastMonth()	Produces a list of all ticket custom fields for tickets the value of the 'Last check date' custom field of which is in last month.

The CUSTOMFIELD () function accepts three arguments:

- » **Source** (uses report primary source if omitted)
- » **Custom field group title** (looks in all available groups for this source if omitted)
- » **Custom field title** (for example, 'Last check date'), custom field name (for example, '6nvjvi53lbh2') or \* (all custom fields).

It is recommended to configure GFI HelpDesk and MySQL to use the same time zone for date conversion accuracy for custom fields of the **Date** type.

### Math functions

Function	Description	KQL Example	Results
SUM()	Calculates the sum of matching results	SELECT SUM('Ticket Billing.Time Spent') FROM 'Ticket Billing' WHERE 'Ticket Billing.Creation Date'>= ThisWeek() GROUP BY X('Ticket Billing.Creation Date':DayName), Y('Ticket Billing.Worker')	Produces a matrix of the total billable time logged for this week, displayed by staff user and by day.
AVG()	Calculates the average of matching results	SELECT AVG('Rating Results.Score') FROM 'Rating Results', 'Tickets' WHERE 'Ratings.Type'='Tickets'AND'Tickets.Creation Date'= ThisMonth() GROUP BY X('Ratings.Title'), Y('Tickets.Owner')	Produces a matrix of the average ticket ratings for the month, displayed per ticket owner.
MAX()	Returns the maximum value from matching results	SELECT MAX('Rating Results.Score') FROM 'Rating Results', 'Tickets' WHERE 'Tickets.Creation Date'= ThisWeek() GROUP BY'Tickets.Owner', 'Ratings.Title'	Produces a list of staff users and their corresponding best (max) rated ticket for the week.
MIN()	Returns the minimum value from matching results	SELECT MIN('Rating Results.Score') FROM 'Rating Results', 'Tickets' WHERE 'Tickets.Creation Date'= ThisWeek() GROUP BY'Tickets.Owner', 'Ratings.Title'	As above, but displays the worst (min) rated ticket for the week.

#### NOTE:

MySQL's math functions are also supported.

### Date and Time Functions

Function	Description
MKTIME()	Converts atimestampinto aunixtime.NOTE: UsesPHP's mktime() syntax.
FROM_UNIXTIME()	Converts aunixtimeinto a human readabletimestamp.
DATENOW()	Returns the currentunixtime.
LAST_DAY()	Takes atimestampreturns the corresponding value for the last day of that month (for example, 31 for October).
DATEDIFF()	Calculates the difference in days between twotimestamps.
MONTHRANGE()	Calculates the dates in between of a range.

**NOTE:**

MySQL's date and time functions are also supported.

## Date and Time Shortcuts

Shortcut	KQL Example
Yesterday()	SELECT Count('Tickets.Ticket ID') FROM Tickets WHERE 'Tickets.Creation Date'= Yesterday()
Today()	... WHERE 'Tickets.Creation Date'= Today()
Tomorrow()	... WHERE 'Tickets.Due Date'= Tomorrow()
Last7Days()	... WHERE 'Tickets.Creation Date'= Last7Days()
LastWeek()	... WHERE 'Tickets.Creation Date'= LastWeek()
ThisWeek()	... WHERE 'Tickets.Due Date'= ThisWeek()
NextWeek()	... WHERE 'Tickets.Due Date'= NextWeek()
LastMonth()	... WHERE 'Tickets.Creation Date'= LastMonth()
ThisMonth()	... WHERE 'Tickets.Resolution Due Date'= ThisMonth()
NextMonth()	... WHERE 'Tickets.Resolution Due Date'= NextMonth()
EndOfWeek()	... WHERE 'Tickets.Due Date'= EndOfWeek()

## Date and time selectors

For various value types, we have implemented Selectors in KQL. Selectors are best demonstrated by an example below:

```
SELECT AVG('Chats.Wait Time') FROM 'Chats' WHERE 'Chats.Type' = 'User' AND 'Chats.Creation Date' = ThisMonth()
GROUP BY X('Chats.Creation Date':MonthName), Y('Chats.Creation Date':DayName)
```

`Chats.Creation Date` is a value that represents a date. You can specify various selectors to this using a colon, following by the selector such as **DayName** and **MonthName**. In this case, these selectors allow you to select parts of a date or render dates in different ways in your report, without any complicated syntax.

Selector	Description	KQL Example
:Day	The day number	SELECT 'Tickets.Ticket ID' FROM Tickets WHERE 'Tickets.Resolution Due Date'= Today() GROUP BY'Tickets.Creation Date':Day
:DayName	The day name (ie Thursday)	... GROUP BY 'Tickets.Creation Date':DayName
:Minute	The minute value	... GROUP BY 'Tickets.Creation Date':Minute
:Hour	The hour value	... GROUP BY 'Tickets.Creation Date':Hour
:Week	The week number (out of 52)	... GROUP BY 'Tickets.Creation Date':Week
:WeekDay	The weekday index, starting from 0 (Monday)	... GROUP BY 'Tickets.Creation Date':WeekDay
:Month	The month number (out of 12)	... GROUP BY 'Tickets.Creation Date':Month

Selector	Description	KQL Example
:MonthName	The month name (ie December)	... GROUP BY 'Tickets.Creation Date':MonthName
:Quarter	The quarter number (out of 4)	... GROUP BY 'Tickets.Creation Date':Quarter
:Year	The year number	... GROUP BY 'Tickets.Creation Date':Year

## KQL query to pull tickets created by staff with 'As a user' or 'Send an email' option

When creating a new ticket, the agent has the option of creating it 'As a user' or 'Send an email.' You may wonder if a report can be generated to show this data.

**NEW TICKET**

**General**

Next Help

**Create ticket type**

**Send an email** A ticket will be created and you will be the author - like sending an email to someone.

**As a user** Create a ticket on a user's behalf, under their own name. Useful for logging phone calls.

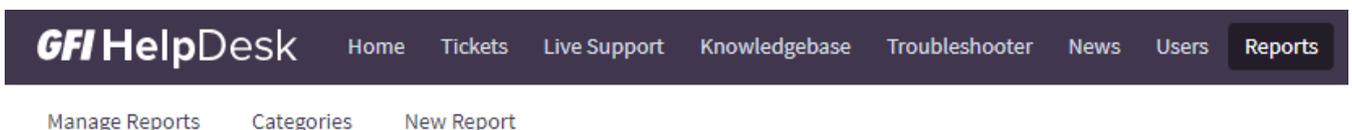
**Create ticket in department** General

Screenshot 76: New ticket window

A KQL query can be generated to pull tickets created by staff with 'As a user' or 'Send an email' option. This article provides the steps on how to generate this report using a custom KQL query.

To generate the report:

1. Log in to your GFI HelpDesk Staff Control Panel, that is, <https://yourdomain.gfihelpdesk.com/staff>.
2. On the Staff Control Panel, go to Reports, and then click **New Report**.



Screenshot 77: New report navigation

3. On the **New Report** form, type in the desired Title.
4. On the Primary Source, select Tickets from the drop-down list.
5. Select a **Category** of your choice.

NEW REPORT

Properties

Title: Tickets Created By Staff

Primary source: Tickets

Category: Let there be light

Public

Next »

Screenshot 78: New report window

6. Click **Next**, and enter the following KQL query.

```
SELECT 'Tickets.Ticket ID',
IF('Tickets.Creator' = 'User', 'As a User', 'Send an email') AS METHOD
FROM 'Tickets'
WHERE 'Tickets.Creation Mode' = 'Staff Control Panel'
```

Tickets Created By Staff

Run Report

Cher: 168

```
SELECT 'Tickets.Ticket ID', IF('Tickets.Creator' = 'User', 'As a User', 'Send an email') AS Method FROM 'Tickets' WHERE
'Tickets.Creation Mode' = 'Staff Control Panel' |
```

Screenshot 79: Enter the KQL query

7. Click the **Run Report** button.

The report should look like the one shown below. You may print, export, or schedule when to run this report as desired.

Tickets Created By Staff	
Ticket ID	Method
3	Send an email
4	Send an email
8	As a User
1317	As a User
1318	Send an email
1319	Send an email

Screenshot 80: Report of tickets created by staff

# 4 Configuration

GFI HelpDesk enables you to run your helpdesk straight out of the box – using the default settings configured prior to shipping. If required you can also customize these settings to suit any particular vulnerability management requirements that your organization might need.

You can customize and configure various aspects of GFI HelpDesk including templates, emails, and .

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## 4.1 Users

The following topics provide information on setting up users and managing them for GFI HelpDesk.

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### 4.1.1 Creating staff accounts and assigning them to teams

Staff user accounts are created and managed within the admin control panel.

A staff user account can be a regular staff user account (that has access only to the staff control panel) or it can be an administrator account (that has access both to the staff control panel as a staff user and the admin control panel as an admin user).

Further, the staff user accounts can be categorized in teams to create different access levels, which are also managed within the administrator control panel.

Teams can be assigned permissions which all staff users inherit if specified for the staff user account. Additionally, if specified, a staff user account can have individual permissions and still be a member of a team.

All staff user accounts must be a member of a team, and the default two teams are Staff and Administrator.

A staff user becomes an administrator user when added to the administrator team. You may specify the permissions in Admin CP from **Admin CP > Staff > Manage Teams**.

There are different permissions provided which can be assigned to the staff according to the team type.

For staff team, there are 49 different permissions that are specified regarding the action that are performed in Staff CP.

For the administrator team, there are 66 different permissions that are specified regarding the actions that are performed in Admin CP.

## 4.1.2 Editing or Deleting Notes for an Organization

Notes are useful when you want to post a special message or instructions for a specific organization.

However, notes can get obsolete, and need to be edited or deleted from the organization. Deleting or editing a note for an organization requires you to go to the organization's profile in GFI HelpDesk.

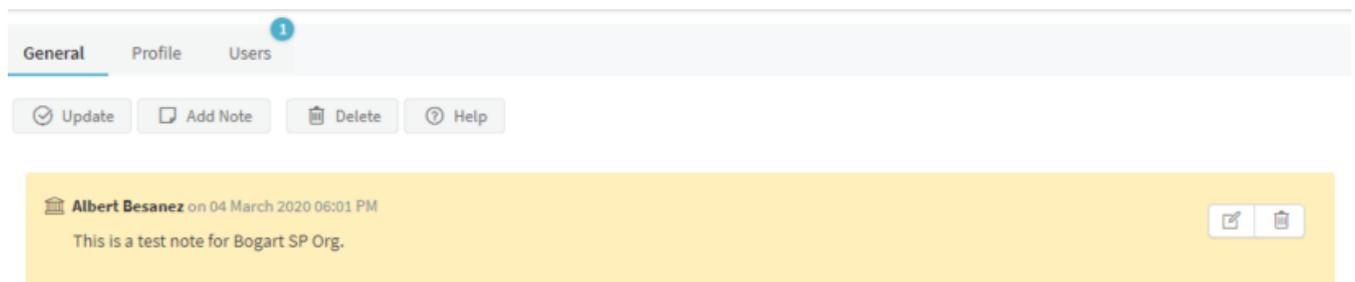
This topic provides the process to edit or delete notes from an organization in GFI HelpDesk.

When you add or create an organization in GFI HelpDesk, you have the option to add a note to the organization.

- » This note is visible (to staff users only) on all tickets created under a user account tagged to the organization.
- » This means that every time a staff user views a ticket from a user account tagged under the said organization, the note is displayed on the ticket.

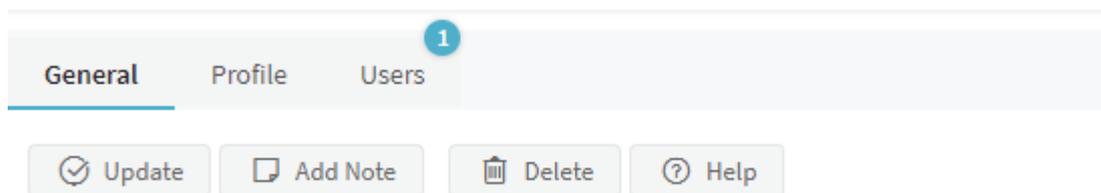
To edit or delete notes from an organization:

1. Log in to your **Staff CP** (that is, <https://<yourdomain>.gfihelpdesk.com/staff>).
2. Click **Users > Manage Organizations**.
3. Search for the **organization** you want to manage. Once located, click it to open the **organization profile**.
4. Under the **General** tab, you can see the note(s) added to the organization. Hover your mouse on to the note you wish to edit or delete.



Screenshot 81: Hover mouse on the note

- » To edit a note, select the edit icon edit.png. On the edit window, enter the new note and click **Save**.
  - » To delete a note, select the trash bin icon trash.png. Click **Ok** on the prompt to confirm the deletion.
5. Once you have finished editing or deleting the note(s), click **Update** to save the changes.



Screenshot 82: Click update

## 4.1.3 Error: "Staff count exceeded"

The number of staff members that you can add to GFI HelpDesk depends on the seats you have purchased. If your staff count exceeds the number of purchased seats, your helpdesk becomes inaccessible and you may receive the following message:

Staff count exceeded. (3 > 2). Please contact GFI HelpDesk Support for further assistance.

This topic provides instructions to resolve this issue.

Execute the below queries to disable extra staff members from the database:

```
UPDATE swstaff
SET isenabled = 0
WHERE fullname = [Full name of any of your staff members in your helpdesk];
```

```
DELETE
FROM swregistry
WHERE vkey='staffcache';
```

**Note:**

Disabled staff accounts do not count in the total seat allocation.

#### 4.1.4 Importing Users from Other CRM or Mailing List

Many organizations maintain their clients' or end users' database, and they expect to use the same database in their GFI HelpDesk Helpdesk for the sake of user database integrity. Hence, the option to import the users' database from a different CRM or mailing list is introduced in GFI HelpDesk to facilitate this.

This topic guides you on how to import users from other CRM or mailing list.

##### Getting CSV file ready

To import user's database in GFI HelpDesk, the database backup should be in CSV file format.

The format for the CSV file should be as follows:

```
EmailAddress | FirstName | LastName | Organization | Phone Number | Salutation | Designation | Email Domain Filter |
Address | City | State | Postal code | Country | Phone | Fax | Website
```

For example:

```
jack@abc.com, Jack, Russel, GFI HelpDesk, 9876942040, Mr, Manager, email@organization.com, Sco 123 G.T Road,
Jalandhar, Punjab, 144001, India, 01812934839, 01813231432, www.organization.com
```

**NOTE:**

The first three fields are mandatory. The columns must be comma separated as shown in the above example. They cannot be separated by semi-colon.

##### Importing users

Once your CSV file is ready, you can import the users in your GFI HelpDesk from: **Staff control panel > Users > Import Users**.

Choose the CSV file where you want to import the users.

When your import is done, you can check to confirm that the users have been created successfully by going to Staff CP and navigating to **Users > Manage Users and Manage Organizations**.

## 4.1.5 Merging user accounts

Your customers can submit requests using different email addresses. It's possible that duplicate end-user accounts might be created.

While merging several user accounts, one user account should be marked as the primary user account. The primary user account acts as a base of the merged user by retaining all the basic details such as name, phone number, address and company details.

Merging moves all the tickets and contact information from the secondary contact(s) into the primary contact. The secondary contact(s) is deleted after merging and cannot be restored.

Below are the steps to merge contacts:

1. Login to your GFI HelpDesk Staff Control Panel.
2. Click on **Users** in the top menu bar and then click on the **Manage Users** option in the sub menu bar.
3. Select the user accounts you are looking to merge.
4. In the **Mass Action** section, click on the **Merge** tab.
5. Select the **Primary User** in the drop down list and click on the **Merge** button on the top.
6. Your users contacts is now merged.

## 4.1.6 Editing or deleting notes for a user account

When you add or create a user account in GFI HelpDesk, you have the option to add a note to the user account. This note is visible in all the tickets created under that user account to the staff users only.

This means that every time a staff user is viewing a ticket from the said user account, the note is displayed on the ticket.

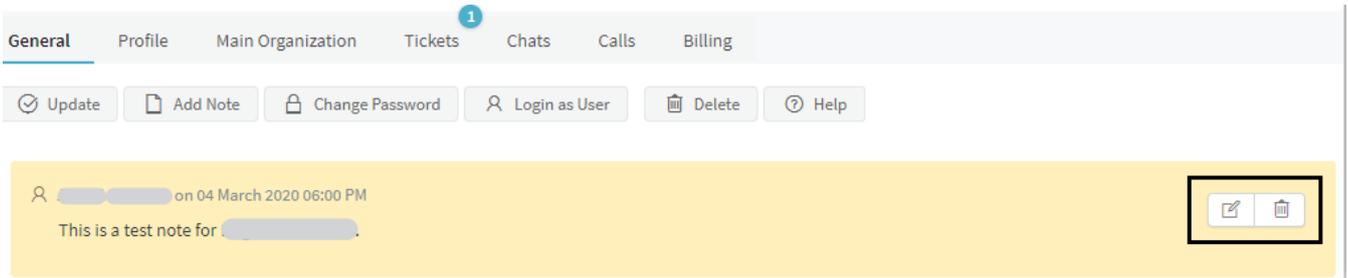
Notes are useful when you want to post a special message or instructions for a specific user. However, notes can get obsolete, and you may wonder how to edit or delete a note.

Deleting or editing a note for a user account requires you to go to the user's profile in GFI HelpDesk.

This topic provides instructions on how to edit or delete notes for a user account in GFI HelpDesk.

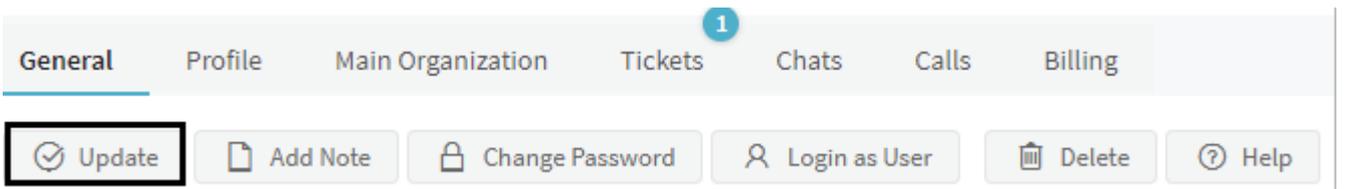
Below are the steps to edit or delete notes for a user account:

1. Log in to your Staff CP (for example, <https://<yourdomain>.gfihelpdesk.com/staff>).
2. Go the **Users > Manage Users**.
3. Search the user account you want to manage and click on it to open the user account profile.
4. Under the **General** tab, you can see the note(s) added to the user account. Hover your mouse on the note you wish to edit or delete.
  - » To edit a note, select the edit icon . On the edit window, enter the new note > click **Save** when done.
  - » To delete a note, select the trash bin icon . Click **OK** on the prompt to confirm the deletion.



Screenshot 83: Hover mouse over the note you want to edit

5. Once you are done editing or deleting the notes, click **Update** to save the changes.



Screenshot 84: Click update

#### 4.1.7 Changing the staff or admin password through the helpdesk

If you are unable to log in to GFI HelpDesk or getting the Invalid username or password error, you may need to reset the password. Admin users can reset the passwords through the helpdesk.

This topic provides step-by-step instructions on how to change the staff or admin password through the helpdesk.

##### POINTS TO REMEMBER!

- » Only administrators can reset the user's password on the account through the helpdesk.
- » Admin users can reset another admin user's password through the helpdesk.
- » Please contact the support team by clicking the Submit a Ticket button at the top of your support page.
- » Please send us your Order ID or Transaction ID as part of the authentication process.

Follow the below steps to change the password:

1. Log in to your GFI HelpDesk admin console.
2. Go to the Staff tab and click on **Manage Staff**.
3. Select the staff member, or you can use the search bar to find the staff member.



Screenshot 85: Select or search for staff

4. Scroll down to the password section and enter the new password on the **Password** and **Re-enter password** boxes.

**Password**

To change this user's password, enter a new password here. Leave blank to leave the existing password in place.

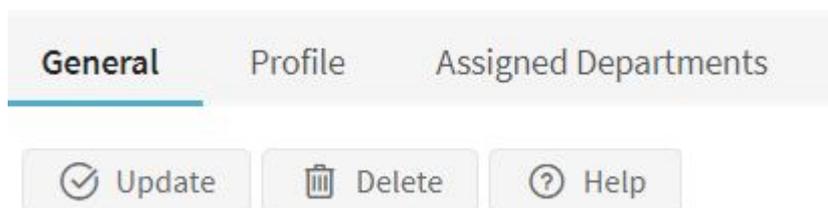
**Password requirements:** Minimum length: 1 characters, Minimum digits: 0, Minimum symbols: 0, Minimum uppercase letters: 0

**Re-enter password**

To make sure there are no typos, please re-renter the password.

Screenshot 86: Enter new password

5. Click the **Update** button at the top to save the changes.



Screenshot 87: Click update

## 4.2 Organizing your support requests into departments

Learn about organizing your support requests into departments in this topic.

For most companies, the responsibility of handling support requests is divided among several different teams.

In GFI HelpDesk, you can distribute the support requests using departments. Splitting your tickets between multiple departments means each request is getting in front of the people best qualified to resolve it.

For each department, you can assign teams or staff members, set its visibility, and choose whether it handles chats or tickets.

You can move tickets between departments either manually or using workflows, and you also have the option to set up notifications for your teams, when a new ticket gets moved into one of their departments.

In this section, it is described how GFI HelpDesk departments work, and then walk step-by-step through creating and editing departments.

Topics in this section:

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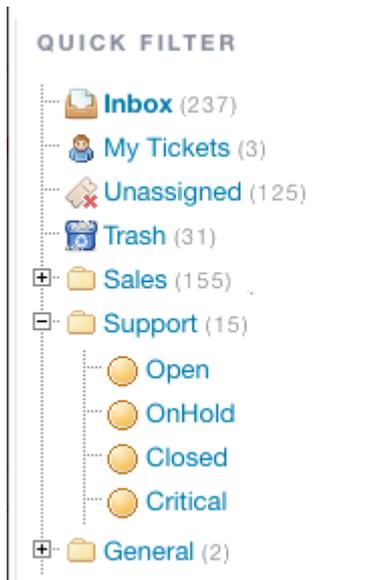
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### 4.2.1 Understanding how departments work

Think of GFI HelpDesk departments as buckets, which you can use to store different types of support requests. For each department-bucket you assign teams and/or individual staff members to it, so they can look after the requests that land in there.

As you set up new departments, they show up in the sidebar of the staff control panel – broken down by ticket priority – so you can quickly switch between buckets.



Screenshot 88: Quick filter

When creating a department, the most important categorization is whether it is for support tickets coming in via email and your support center or for Live Chats conversations that you are having via GFI HelpDesk Desktop.

You can also choose whether it is visible to your customers – so they can choose it when submitting a ticket – or only visible to your staff.

Next, you can choose teams and staff members to assign to it, and finally, add translations for the department name for any other languages you have enabled.

Once the department is set up, you have several options for adding requests to it. You can do it:

- » manually, while updating the ticket.
- » automatically when a ticket comes in, using email parser rules.
- » set up a workflow that your staff can use to quickly update and move tickets between departments.

Now that we have covered the department basics, let us have a look at creating a new one.

## 4.2.2 Creating and managing departments

Many GFI HelpDesk users create a dedicated departments for each of their staff teams. You can add as many new departments as you need, and update them as your organizational needs shift.

Below, is a step-by-step process for creating a new department.

### NOTE:

To create or edit departments, you need an administrator account with the 'Departments' permission.

To create a new department in GFI HelpDesk:

1. Sign in to the admin control panel.
2. Click on **Departments** option in the top navigation bar.
3. Click on **Insert Department**.

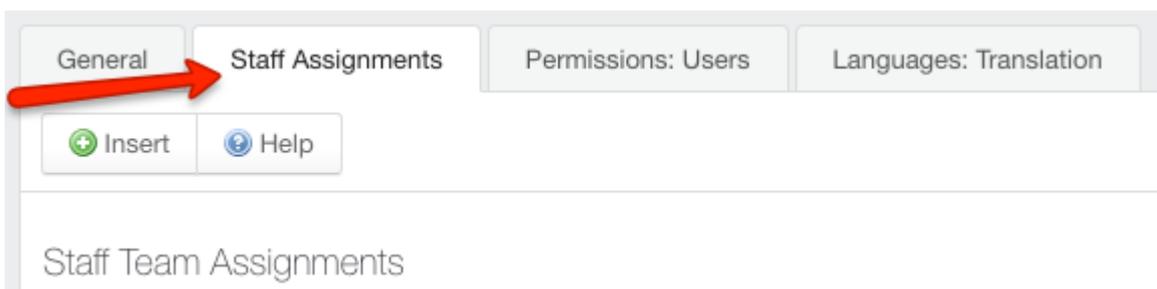
Screenshot 89: Insert department navigation

4. Enter a **Department name** first.

**Note:**

You can skip the Parent department, unless you have a huge collection of departments and want to nest them.

- 5. Enter a value for **Display order** to set the order of display in the list of departments. The smaller the number, the higher it appears in lists.
- 6. Choose a **Type** for the department. 'Public' means customers can see and select it when submitting a request. 'Private' means only your team can see and select it.
- 7. And finally, from **Channel**, select whether it is a department for Live Chats or Tickets.
- 8. Before we save your department, we're going to choose which staff members has access to the department from their staff control panel.
- 9. Switch to the **Staff Assignments** tab.



Screenshot 90: Staff assignment tab

- 10. From the **Staff Team Assignments** section, click **Yes** corresponding to any team you want to assign to a department.
- 11. From the **Individual Staff Assignments** section, click **Yes** corresponding to any additional staff members you want to assign.
- 12. If you want a particular set of users to be able to select the department when submitting a ticket from the support center, you can find such options on the **Permissions: Users** tab.
- 13. If you offer support in multiple languages and want to add translations for the department name, you can do that from the **Languages: Translation** tab.
- 14. When you have your department fully configured, click **Insert** to save your department and start using it in your helpdesk.
- 15. Once a department is created, you can come back and edit any of the settings above by clicking the **Manage Departments** link in the toolbar.

Screenshot 91: Manage departments navigation

You are now ready to keep your queue organized with different departments for different types of support requests.

## 4.3 Custom fields

Learn how to create custom fields for capturing user and ticket information.

Many areas of GFI HelpDesk prompt customers for information, but sometimes, the standard questions do not get you all the details you need.

For those situations, GFI HelpDesk has custom Fields, which you can add to most customer-facing forms to request whatever information your team needs.

Custom Fields allow you to expedite your support processes by cutting down on the back and forth with your customers. Meanwhile, they let you capture and store useful customer information to help you deliver exceptional support experience.

This section explains how custom Fields work in GFI HelpDesk, where they are available, and how to create them.

Topics in this section:

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### 4.3.1 Understanding how custom fields work

First, every Custom Field belongs to a Group, which you use to organize related Fields and control the location in GFI HelpDesk they are displayed.

For each **Group**, you add a **Title** and select a Location:

- » **User profile** – Store additional customer details on their user profiles. Users are prompted to fill in these Fields when registering on your support center, and staff can fill them when inserting or managing users from the staff control panel.
- » **User organization profile** – Capture information about user organizations. These Fields are visible and editable by users when they fill in their organization details on their support center profile. Staff can also edit these Fields under the Organizations section in the staff control panel.
- » **Live chat (before chat)** – Ask for specific details before letting customers start a chat conversation.
- » **Live chat (after chat)** – Add questions to display in the live chat window when a conversation is completed. Use them to solicit specific ratings, feedback, etc.
- » **Staff ticket creation** – Create custom Fields on the form for staff for using it on creating a new ticket from the staff control panel. These Fields are not visible to your customers.
- » **User ticket submission** – Prompt your users for specific information when they're creating a new support ticket on the support center.

- » **Staff and end user ticket creation** – Select this location to create a Group of Fields that appears to both your staff and your end users, when they're creating new support tickets.
- » **Ticket time tracking / billing entry** – Track detailed billing information by adding custom Fields to the Billing ticket tab in the staff control panel.

**NOTE:**

Once a custom Field Group is created; you cannot change its location.

When you have created a field Group or two, you can start to add the Fields themselves. GFI HelpDesk supports a variety of different field types:

- » **Text** – Small, single-line text box that allows users to enter a short string of text.
- » **Text area** – Larger text area, spanning multiple-lines, that allows users to enter larger blocks of text.
- » **Password** – Text box that masks any values entered, for security.
- » **Checkbox (multiple choices)** – List of options with checkboxes next to them. Users can select multiple options.
- » **Radio Buttons (single choice)** – List of options with radio button selectors. Users can select one option.
- » **Drop-down select (single choice)** – List of options in a dropdown menu. Users can select one option.
- » **Multi-selection menu (multiple choices)** – List of options in a menu. Users can select multiple options.
- » **Linked select (multiple choices)** – Drill down menu that takes users through nested options, where they can make multiple selections.
- » **Date** – Pop-up calendar that users can select a date from.
- » **File** – Field where users can upload individual files.
- » **Custom** – Blank field container that allows you to supply your own HTML for a form field.

After you have selected a Field type, you can define the field's options and also configure its behavior in the following ways:

- » You can control whether it's editable by users or just by staff.
- » You can make it required.
- » You can restrict the values it accepts by matching them to a regular expression.

### 4.3.2 Inserting a new custom group and field

You can use custom Fields to serve a lot of different purposes. Consider a common example – adding Fields to the ticket submission form to capture the user's product type and serial number.

You need an administrator account with the Custom field Groups and Custom Fields permissions to execute the following instructions:

1. Log in to the admin control panel and click **Custom Fields > Groups** in the sidebar.
2. Click the **New button**.
3. Add a Title for your new Group, such as Product Details.
4. From the **Custom field Group location** dropdown, select **Staff and end user ticket creation**.

**Group title**  
The custom field group title is displayed above any custom fields which you add to this group. For example, *Order information*.

**Custom field group location**  
Custom field groups are bound to an area of your helpdesk - such as ticket creation, or before a live chat. Once set for a group, this cannot be changed.

**Group visibility**  
**Public** Custom field groups are available to both staff and end users (where applicable).  
**Private** Groups are available only to staff users.

**Display order**  
If there are multiple custom field groups in the same location, they will be displayed according to their display order, smallest to largest.

- ✓ User profile
- User organization profile
- Live chat (before chat)
- Live chat (after chat)
- Staff ticket creation
- User ticket submission
- Staff and end user ticket creation
- Ticket time tracking/billing entry



Screenshot 92: select Staff and end user ticket creation

5. Set **Group Visibility** to **Public**. (Since you want customers to be able to use these Fields)
6. If you have multiple Groups in the same location, you can use **Display order** to control the order in which they appear.
7. Next click the **Insert** button to create your Group.
8. Now we are ready for the Fields themselves. Click **Fields** in the sidebar.
9. Click **New**.
10. We'll start with our Product field. Select **drop-down select** (so that users are limited to the list of products we define).
11. Click the **Next** button.
12. From Custom field Group, select the **Product Details Group** to add it to the Field Group we just created.
13. Add a descriptive name in **Field Title** in this case Product.
14. In Field description, provide a description text that appears below the field.
15. In the **Field Options** list, enter the options your users can choose from.
16. If you need more than the default eight spots, click the Insert button above the list.



**Field Options**

	-
	-
	-



Screenshot 93: Click insert

17. Switch to the **Options** tab, up top.
18. Set **Required** field to **Yes**, to make the new Field mandatory.
19. And for Field editable by end users, select Yes, to let our customers make changes.

20. Click **Insert** to save the new Field.
21. Next, add a Serial Number field. Click **New**.
22. From **Custom field Group**, select the **Product Details Group**.
23. Select **Text** for the Field type, and click **Next**.
24. In **Field title** select **Serial Number**.
25. Add a quick bit of help text to the Field description.
26. Switch to the **Options** tab.
27. Leave this field as optional, but make sure that Field editable by end users is set to **Yes**.
28. Click **Insert** to save the field.

Your users now see the **Product Details** section on the submission form whenever they go to create a new ticket from your support center.

The screenshot shows a form titled "Your ticket details". Below the title is a note: "If you are reporting a problem, please remember to provide as much information that is relevant to the issue as possible". The form is divided into two sections: "General Information" and "Product Details".

**General Information** includes:

- First and Last Name:
- Email:
- Priority:

**Product Details** includes:

- Product\*: 

Please select the product make and model you need help with.
- Serial Number: 

Please enter your serial number. (Usually found on a label on the back of the machine.)

A red arrow points from the "Product Details" header to the "Product\*" field.

Screenshot 94: Users see product details section

## 4.4 Email configuration

Get detailed instructions for configuring inbound and outbound emails in GFI HelpDesk.

Topics in this section:

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## 4.4.1 Setting up email notifications for your staff

Keep your staff up-to-date on their support tickets, even when they are away from the queue, with notifications. GFI HelpDesk makes it easy to proactively notify staff members, teams, or even customers about changes to their support tickets, via email.

For each notification, you can configure GFI HelpDesk as to which tickets it should apply, what specific change or event should trigger it, and who to email when all those conditions are met.

In this section, you can learn how notifications work in GFI HelpDesk and how to create and edit it.

---

---

### Understanding GFI HelpDesk notifications

When a ticket is updated or a new user registers, GFI HelpDesk checks it against any notifications that is created.

If the ticket and update type matches the criteria for notification, GFI HelpDesk sends an email to any staff, teams, or users you have selected.

There are two types of notifications you can create:

- » **Ticket:** This is the most important application of notifications. You can use this option to set up notifications about ticket updates, like changes to a ticket's priority, department, status, owner, etc.
- » **User:** You also have the option to notify staff members when a new customer user registers on your support center.

You have to select criteria to tell GFI HelpDesk when to send the notification; then you can have multiple options to choose who receives the notification itself:

Email

Send email to the ticket owner's...

- Own staff user account
- Team
- Department
- User

Send email to other staff

- [Blurred]
- [Blurred]
- [Blurred]
- System Admin

Send email to other email addresses

Screenshot 95: Notification options

The first group of options is only available for ticket notifications since their value depends on the specific ticket:

- » **Own staff user account:** Emails the owner of the ticket
- » **Team:** Emails the entire team or teams that the ticket owner belongs to
- » **Department:** Emails any staff members assigned to the department the ticket is in
- » **User:** Emails the customer who opened the ticket

The rest of your options are available for either ticket or user notifications, and allow you to specify either specific staff members or any other email address.

Below are examples of some of the many different uses for notifications:

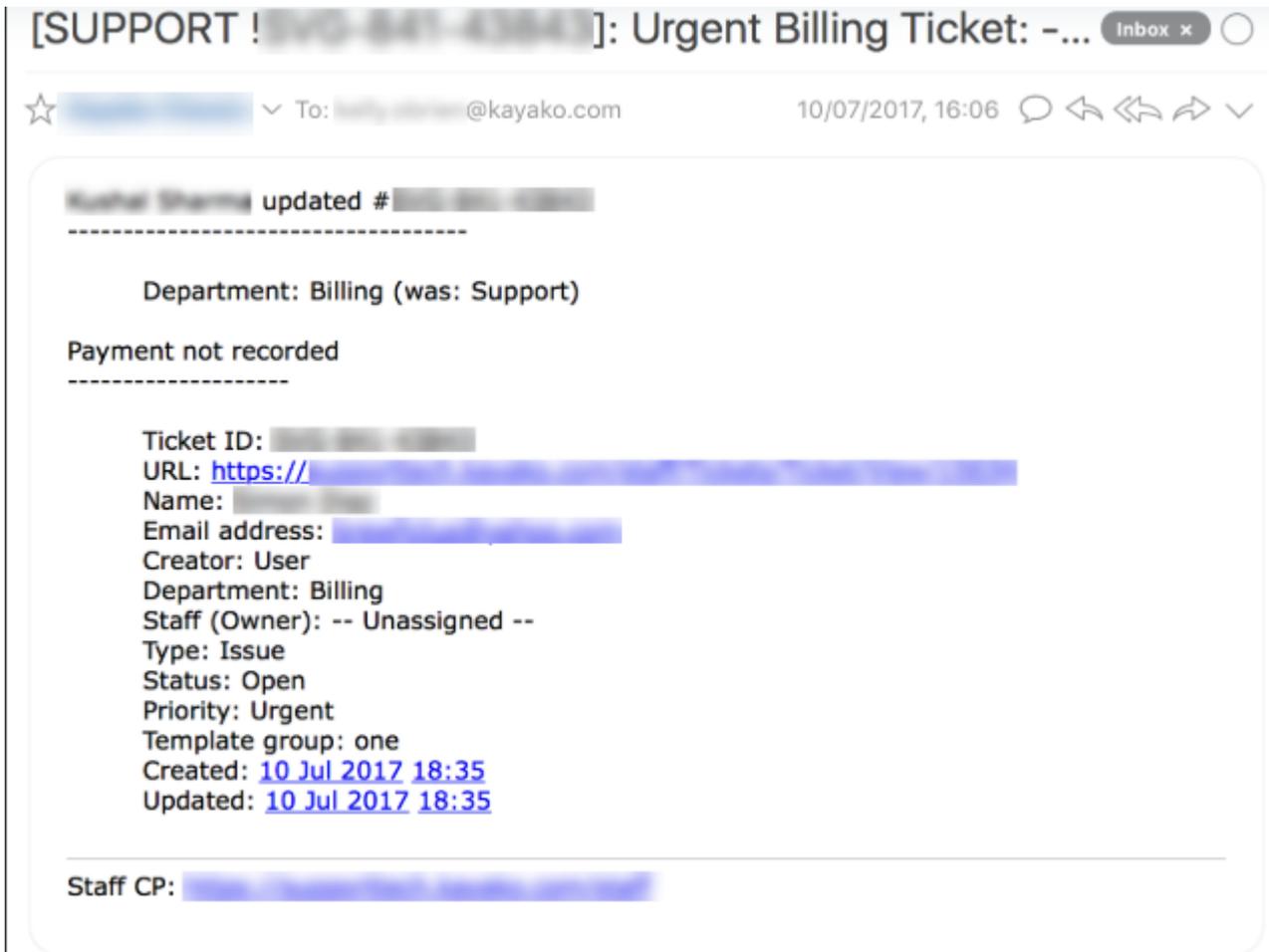
- » For ticket notifications, you can use one to keep your staff informed whenever a ticket of a particular priority is assigned to a specific department. For example, you want to send an email to the head of your billing team whenever a new urgent ticket is assigned to the Billing department. You could create a new notification that looks like this:

The screenshot shows a configuration window for a notification rule. At the top, there are tabs for 'General' and 'Email', with 'Email' selected. Below the tabs are three buttons: 'Update' (with a green checkmark), 'Delete' (with a trash icon), and 'Help' (with a question mark icon). The main configuration area includes:

- Rule title:** A text input field containing 'New Urgent Ticket in Billing'.
- Notification rule enabled:** A toggle switch set to 'Yes'.
- Criteria:** A section with an 'Insert Criteria' button and two rows of criteria:
  - Row 1: 'Ticket department' (with a trash icon) changed to 'Billing' (with a dropdown arrow), connected by 'Changed to', and then 'Billing' (with a dropdown arrow) connected by 'AND'.
  - Row 2: 'Ticket priority' (with a trash icon) equal to 'Urgent' (with a dropdown arrow), connected by 'Equal to', and then 'Urgent' (with a dropdown arrow) connected by 'AND'.

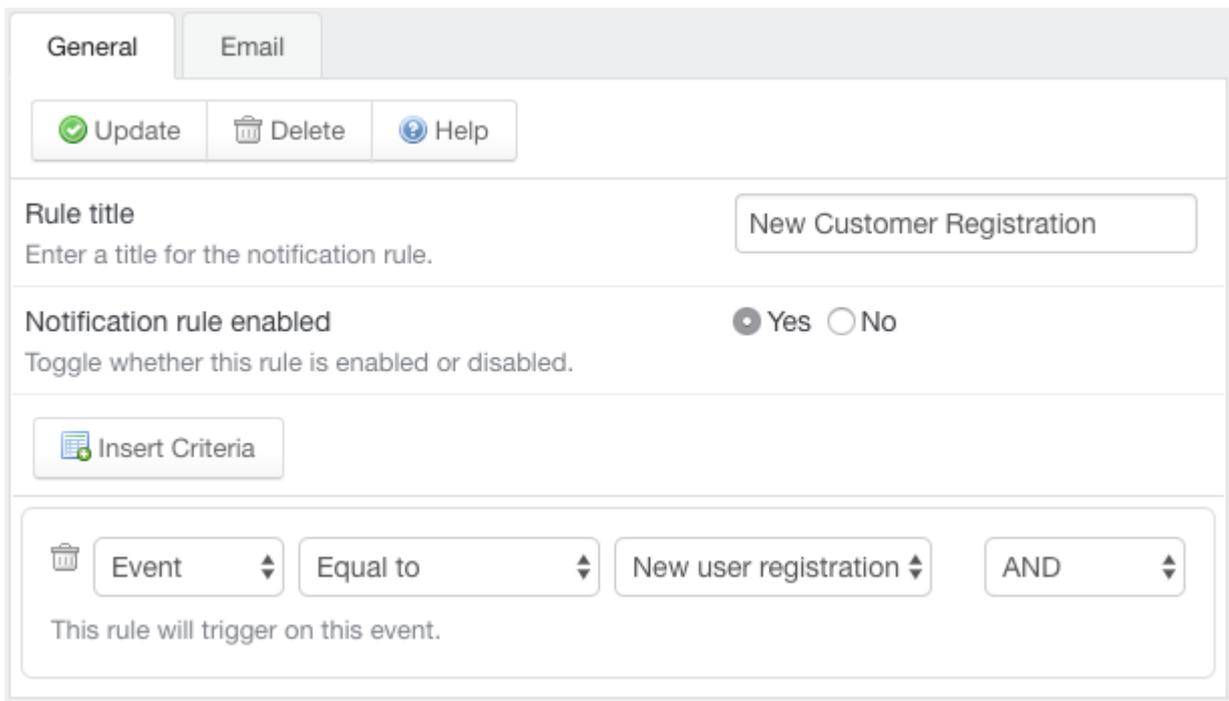
Screenshot 96: Notification setting for ticket assignment

With this notification enabled and your billing lead's email selected as a recipient, GFI HelpDesk sends the following email whenever an urgent ticket is moved to the Billing department:

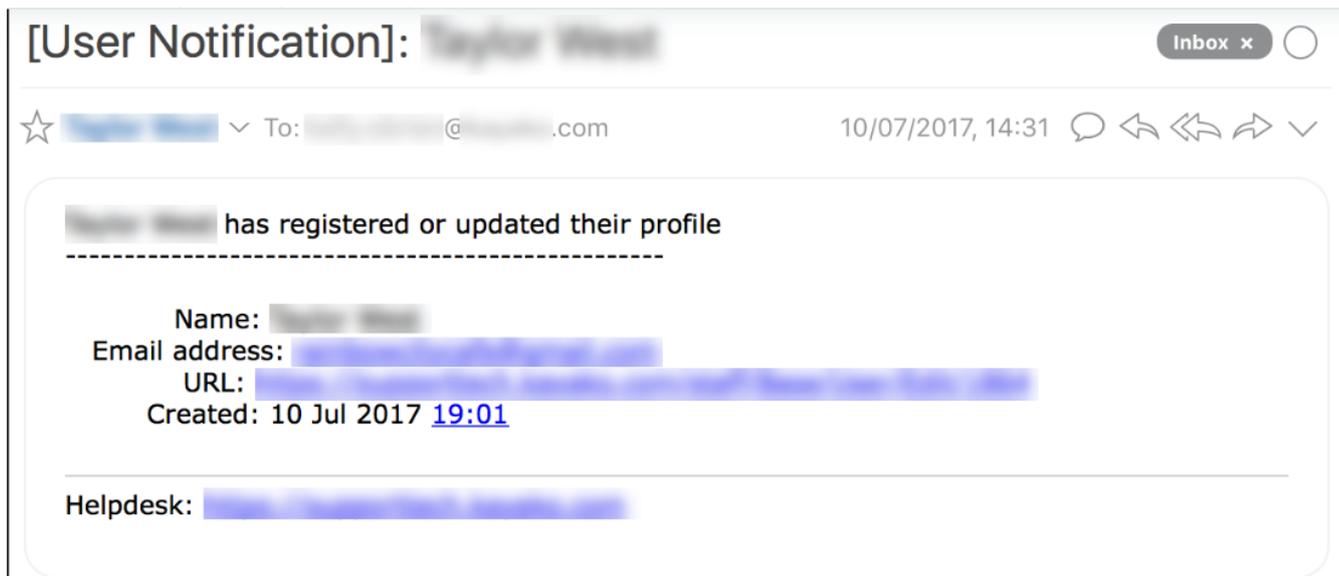


Screenshot 97: Email for ticket notification

» User notifications work very similarly. If you wanted to notify your support lead whenever a new user registers on your support center, you could do that with a user ticket configured like this:



Screenshot 98: Notification setting for new user registration



Screenshot 99: Email for new user registration notification

## 4.4.2 Introduction to email queues

Email is GFI HelpDesk's primary support channel.

If you want to offer email support from an existing email address – like `support@yourcompany.com`, you have to set up an email queue for each address.

This section describes email queues and how they work.

---

### Email queues and how they work

Setting up email queues allows GFI HelpDesk to go out, check a specific email address for messages, and then pull those messages into your helpdesk.

Once email address queue is set up, any message sent to that address are converted into a ticket and added to GFI HelpDesk.

GFI HelpDesk staff can view and respond to the request just as any other ticket.

In addition, when a staff member replies to a ticket, the customer receives the reply in their email inbox and can continue to respond via email.

### Understanding how email queues work

**GFI HelpDesk** uses email queues to fetch emails and convert them into tickets automatically. From admin console, go to **Email Parser > Email queues** to set your first queue. Once created emails sent to this queue are automatically fetched and converted to a ticket.

For any non-GFI HelpDesk email address you want to use, you can create additional email queues.

For example, you might want to set up several email queues for different addresses at your company domain, say, `support@yourcompany.com`, `sales@yourcompany.com`, and `info@yourcompany.com`.

If you are migrating from another solution to GFI HelpDesk or migrating your email services, you need to update your new email hostname, user and password in GFI HelpDesk to keep emails working as expected.

Each email address gets its own queue in GFI HelpDesk, which uses one of three methods to connect to your account:

» **POP3** – If your email server supports POP3 access, you use this method by filling in your server credentials so GFI HelpDesk can check your mail server.

**Note:**

A server job is required for **POP3** email fetching, and this needs to be set up as a cron job in Linux or tasks in windows. See [Manually Scheduling a Server Task/Cron Job for GFIHelpdesk Download](#).

» **IMAP** – If your email server supports **IMAP** access, you can use this method by filling in your server credentials.

**Note:**

A server job is required for **IMAP** email fetching, and this needs to be set up as a cron job in Linux or tasks in windows. For more information, see [Manually scheduling a server task/cron Job for GFIHelpdesk](#)

Once a queue is added for an address, GFI HelpDesk can be configured to handle tickets that are created from that queue. For example, you could configure your email queue for sales@yourcompany.com to automatically assign its tickets to the Sales department and set their priority to High.

### 4.4.3 Advanced email configurations

This sections has information about the advanced email configurations and settings.

---

---

#### Error "From Email is Empty #0..." when parsing emails

Sometimes, when a user tries to send an email with multiline headers or a `From` address that contains special characters, they see the error in the email parser log that says `From Email is Empty #0`. This article provides information on how to fix this issue.

This issue is a known bug that was caused by the code that **handles multiple recipients** or **missing quotes** that were not present. The parser was detecting the data on the `From` field as invalid.

If you are still using **GFI HelpDesk 4.93.0**, then you are likely to encounter this issue since it is a known bug on this version which was fixed in GFI HelpDesk 4.93.02 and higher versions. So to resolve this issue, you need to upgrade your helpdesk to the latest version available.

To upgrade to the latest version of GFI HelpDesk, please visit the [Upgrading or Downgrading Your GFI HelpDesk](#).

#### Preventing spam in Russian language

Spam, junk, or unsolicited bulk emails can come from different sources with messages that are mostly commercial.

They are not only annoying, but they can also be dangerous as they may include phishing links or attachments containing malware. At times, you may receive spam emails in the Russian language.

This topic provides instructions to block spam emails that contain messages in Russian.

To add a rule to ignore every email that contains Russian characters in the subject line or body, please follow the steps below:

1. Log in to your GFI HelpDesk instance and go to the admin area.
2. Under **Email Parser**, click **Rules**.

## Email Parser

- Settings
- Email Queues
- Rules**
- Breaklines
- Bans
- Catch-all Rules

Screenshot 100: Click Rules

3. Click on the **New** button on the right side of the screen.

Logout: AB

---

 New

Screenshot 101: Click New

4. Enter the rule title. Make sure that the following options are enabled:

- » Email parser rule enabled
- » Stop processing other rules

### Email rule title

For example, *PayPal receipts*.

Block Russian Spam

### Email parser rule enabled

Email rules will be ignored if disabled.

Yes  No

### Stop processing other rules

If this rule is matched first, no other email rules will be processed after this one.

Yes  No

Screenshot 102: Enable - Email parser rule enabled and Stop processing other rules

5. Click **Insert Criteria** and enter the following settings:

- » **Subject** - Regular Expression - / [А-Яа-яЁё] /u - OR
- » **Body** - Regular Expression - / [А-Яа-яЁё] /u - OR
- » Furthermore, if only one of the email queues is affected by the spam emails, you can add an extra condition: **Email Queue** - Equal to - [myqueue]@[myqueue].gfihelpdesk.com - AND

**Insert Criteria**

---

Subject ▼
   Regular expression ▼
   /[A-Яa-яЁё]/u

Matches the email subject.

---

Body ▼
   Regular expression ▼
   /[A-Яa-яЁё]/u

Matches the remaining contents of the email body after HTML (unless configured otherwise) and breaklines have been stripped out.

Screenshot 103: Click Insert criteria

6. Under the **Actions** tab, enable the following options (select Yes):

- » Ignore email,
- » Do not send autoresponder
- » Do not process notification rules

**Ignore email**  Yes  No

The email will be ignored by the helpdesk and will not be processed into a ticket or a reply.

---

**Do not send autoresponder**  Yes  No

An autoresponder confirming receipt of new email (as a new ticket or reply) will not be sent.

---

**Do not process notification rules**  Yes  No

Helpdesk notification rules will not be processed if enabled.

Screenshot 104: Actions tab

7. Click **Insert** to save the changes.

General
**Actions**

+ Insert
? Help

Screenshot 105: Click insert

**Note:**

Additionally, the email queue can be restricted to accept emails only from registered users. This email queue accepts only emails from the users with an existing user account. Hence, non-registered users cannot send you emails (to this queue), and they are prompted to create an account first. For more information, please refer to the [Restricting Email Queue](#) article.

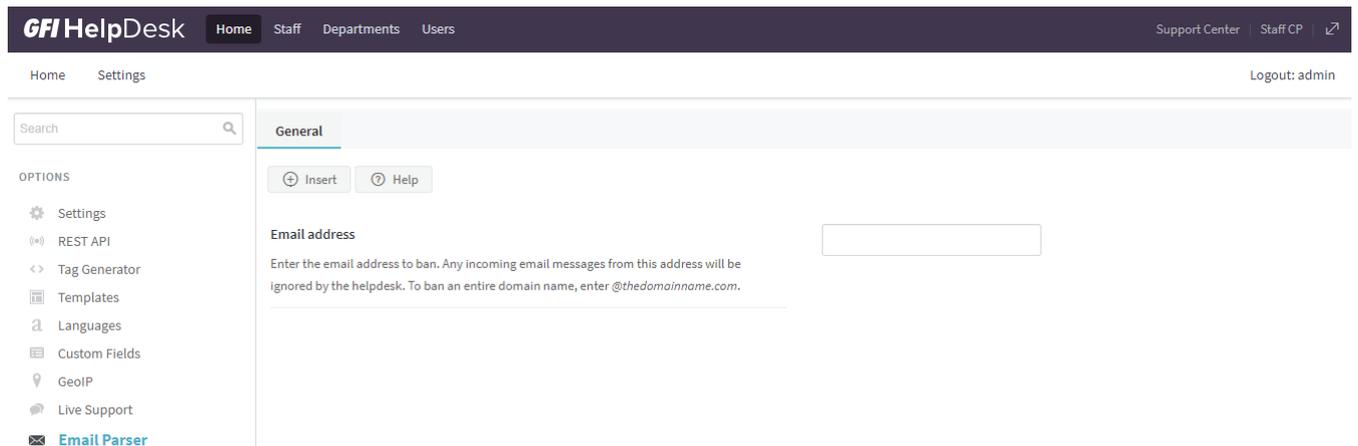
## Manually adding or removing email ids from banned list

Once an email has been marked as spam, it is listed and can be found in **Admin Control Panel > Mail Parser > Bans**. For further details, see [Marking tickets as spam](#).

This topic describes how to manually add or remove an email ID from this Bans list.

### To Add an email to the banned list

1. Navigate to **Admin Control Panel > Mail Parser > Bans > New**.
2. Enter the email address to ban. For example, example@domainname.com. Any incoming email messages from this address is ignored by the helpdesk.



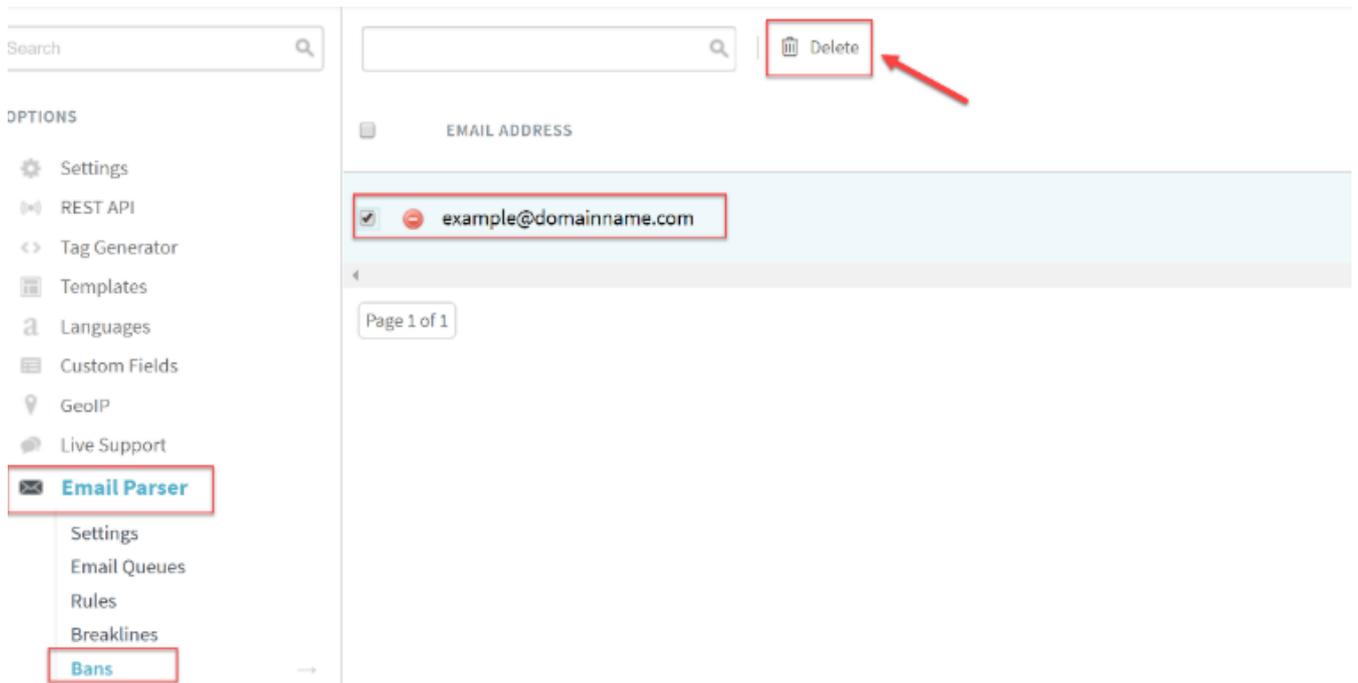
The screenshot shows the GFI HelpDesk Admin Control Panel. The top navigation bar includes 'Home', 'Staff', 'Departments', and 'Users'. On the right, there are links for 'Support Center', 'Staff CP', and a user icon. Below the navigation bar, the page title is 'Home Settings' and the user is logged out as 'admin'. A search bar is located at the top left. On the left side, there is a sidebar with 'OPTIONS' including Settings, REST API, Tag Generator, Templates, Languages, Custom Fields, GeoIP, Live Support, and Email Parser (highlighted). The main content area is titled 'General' and contains an 'Insert' button and a 'Help' button. Below these buttons is a text input field labeled 'Email address'. The text below the input field reads: 'Enter the email address to ban. Any incoming email messages from this address will be ignored by the helpdesk. To ban an entire domain name, enter @thedomainname.com.'

*Screenshot 106: Enable Email parser rule enabled and Stop processing other rules*

3. To ban an entire domain name, enter @domainname.com.
4. After entering the email ID or the domain name in the specified format, select Insert.

### To remove an email from the banned list

1. Navigate to **Admin Control Panel > Mail Parser > Bans**.
2. Select the email ID to remove from Bans list.
3. Select **Delete**.



Screenshot 107: Select Delete

**Note:**

Email bans work only for tickets created via email parser.

## Setting up autoresponders for different email queues

This topic guides you on what needs to be done to set up **Autoresponders** for different **Email Queues**.

Serving different customers via different support email addresses brings a natural need to send different automated emails.

### Modifying responsible language phrases and templates:

1. Insert the required language phrases in other languages.
2. Modify Autoresponder templates.

The content used in automated emails.

Example: Autoresponder email is sent via the language phrases.

### Two Parts of Language Phrases:

- » Identifier: The keyword used as a variable within the template code to call the text value.
- » Text Value: Contains the actual information/content displayed in the emails.

### Responsible language phrases for autoresponder emails are:

- » arintro
- » arsubfooter
- » arfooter

## Setting up autoresponders for different email queues

1. Insert the required language phrases in another language:

New language phrases can be inserted from **Admin Interface > Languages > Phrases > Insert Phrase** `arintro`. In the same way, you can insert other two language phrases `arsubfooter` and `arfooter` for the language you wish to use in automated emails.

2. Modify autoresponder templates:

Autoresponder templates are located under **Admin Interface > Templates > Groups > Select the group > Templates > Tickets**.

Autoresponder Templates	Send HTML Email (Admin Interface > Settings > Email)
email_ticketautoresponderhtml	Yes
email_ticketautorespondertext	No

Further, you can make use of if statement to control the execution of a particular section of code. Following is an example to understand its usage:

```
<{if $_ticket[emailqueueid] == '1'}>
```

Execute block one:

```
<{/if}>  
<{if $_ticket[emailqueueid] == '2'}>
```

Execute block two:

```
<{/if}>
```

And so on.

- » Email queue ID can be checked by hovering the email queue under **Admin Interface > Email Parser > Email Queues** or from Cache Info, under **Admin Interface > Diagnostics > Cache** Info and searching for `queuecache`.
- » You can also make use of if-else statements instead of using different if statements.

3. Rebuild helpdesk cache after making changes in Templates, from **Admin Interface > Diagnostics > Rebuild Cache**.

### Notes:

- » All language phrase variables are case-sensitive.
- » All newly added language identifiers must be unique.

## Using break-lines to remove previous replies from incoming emails

Break-lines are standard strings that denote the end of a new e-mail reply, where previous responses have been preserved. In other words, the Break-lines in Fusion prevents the addition of previously quoted content in an e-mail reply.

This topic provides details on using the Break-lines to achieve this goal and also information to keep into consideration about it.

The helpdesk strips the entire text that follows the Break-line. The parser strips off the content to ensure the threaded ticket view within the client support interface and staff control panel is clean when viewing a ticket.

An example of Break-lines:

```
=====
Original reply by client via E-mail :
Reply Content
-----Original Message-----
Quoted Message

Result (after ticket is parsed in the help desk):
Reply Content
=====
```

Break-lines can be added from **Admin CP > Mail parser > Breaklines > New**. Break-lines can be added as plain text or using regular expression and specifying them as **Regex**.

Additionally, if you want that inserted Break-line should append in all the ticket replies automatically, then Break-line can be added at the above of the below mentioned templates from **Admin CP > Templates > Templates > Tickets** :

- » email\_ticketstaffreplyhtml
- » email\_ticketstaffreplytext

**Note:**

Break-lines only work on tickets created via e-mail / Mail Parser and do not work on tickets that are created via the client support center.

These do not apply to new tickets. Means, if a client creates a new ticket via e-mail, which contains a text matching to a Break-line, it does not strip the text off from this first post.

The Break-lines text is only matched to \*replies\* to the existing tickets, which are being sent via e-mail.

Also, in case you would like GFI HelpDesk to not include the ticket reply summary in staff replies, you can tell it to stop doing exactly that by going to **Admin CP > Options > Tickets > Settings**.

### Using SPF to avoid emails from being marked as spam

**SPF (Sender Policy Framework)** is an **anti-spam** technique used by some modern email services to ensure the email they are receiving is really coming from your email server.

An entry is placed on your domains **DNS (Domain Name Service)** records. This record holds the IP address of the email servers which are authorized to send a legitimate email for your domain. When an email server receives an email, it looks up the IP listed on this record, and then compare that IP to the IP of the connecting server. If they are different, it knows the connection is not authorized and terminates the connection. If they match, it receives the email.

This topic describes the process to set up SPF for GFI HelpDesk.

Add a new TXT record to your email domains DNS record, the record you need to add depends on your mail servers IP address:

- » For example, If your email domain is MyEmailDomain.com, and your mail servers IP address was 100.200.100.200 then the SPF record you would need to add to your domains DNS would be:

```
MyEmailDomain.com. IN TXT "v=spf1 mx ip4:100.200.100.200 ~all"
```

» If your GFI HelpDesk server routes email directly, then you would need you to add both the IP of your mail server and your GFI HelpDesk server, for example:

```
MyEmailDomain.com. IN TXT "v=spf1 mx ip4:100.200.100.200 ip4:100.200.100.100 ~all"
```

» If you are unsure of which record to add, please [contact our support](#) who can advise you on which record you have to add. Adding incorrect records results in emails your sending out, not arriving at the recipient's end.

## Disabling automated emails

Sending automated emails can make a support persons' life easy as they do not need to look and acknowledge new requests while sitting on their desks, or keep a constant track of time so that an important follow-up with a client is not missed. However, automated emails do not fit in all business requirements, and you may need to stop all or some of them.

This topic provides the different types of automated emails that GFI HelpDesk sends and, along with it, the options to stop them.

Below is a list of automated emails in GFI HelpDesk and where to disable them:

### » **Registration email**

Every new user registered in helpdesk receives a welcome email. It can be disabled by turning off the Send registration confirmation email option available under **Users > Settings** in Admin Interface.

### » **Autoresponder email**

It is dispatched to the ticket creator confirming the receipt of a new ticket in helpdesk as an acknowledgment. It can be disabled from:

» Tickets created via **Support Center**:

Go to **Admin Interface > Users > Manage User Groups > Permissions > Receives new ticket Autoresponder**.

» Tickets created via **Email Queues**:

Go to **Admin Interface > Email Parser > Email Queues > Ticket Options > Send new ticket Autoresponder**.

### » **Ticket survey email**

Ticket survey is enabled for Closed status in a standard installation, that is, the user receives the survey email automatically when you change the ticket status to closed. Disable the Send satisfaction survey email option to stop the survey emails from being sent for Closed status from **Admin Interface > Settings > Tickets > Statuses**.

### » **Auto-close notification emails**

If you have an active auto-close rule in your helpdesk, your users receive "ticket inactivity and closure" notification emails respective to the rule criteria. These notification emails can be stopped from being sent by navigating to **Admin Interface > Tickets > Auto Close**.

### » **Staff notifications**

Your staff may receive notification emails on user account registration/updating or different ticket events. You may check and disable notification rules from **Staff Interface** under **Home > Notifications**.

## Setting up signatures for outgoing emails

Signatures in the outgoing emails are pulled from the Staff Profile and the Email Queues. However, signatures set up in the Staff Profile are always displayed above the Email Queue signatures in the outgoing emails.

This article provides instructions to set up the Staff Profile and Email Queue signatures.

### Setting up a staff profile signature

1. Navigate to the **Staff Control Panel** by clicking **Home > My Preferences > Profile tab**.
2. Enter the signature you'd like to use.
3. Click **Update** to save.

### Setting up an email queue signature

1. Navigate to the Admin Control Panel by clicking **Home > Email Parser > Email Queues > Select the email queue > Settings tab**.
2. Enter the signature you'd like to use.
3. Click **Update**.

## Optimizing the configuration of the email queues

Once you have set up at least one email queue in GFI HelpDesk, it is worth taking a look at some of your system-wide settings, to make sure your queues are operating at optimum efficiency.

In this topic, you can look at some of the settings that you should be aware of to keep things running smoothly.

## Optimizing your email settings

Within the admin control panel, you can find a handful of system-wide settings under Email Parser and then Settings on the sidebar.

On the page that opens up, you can see a long list of email configuration options. We would not go over all of them in this article since they apply to a variety of different email-related processes. Instead, we focus on the settings that are most critical for safeguarding the performance of your email queues.

### » **Maximum number of emails to download in a batch**

Right up top, under the POP3/IMAP Email Download Settings heading, this setting controls the maximum number of emails fetched into GFI HelpDesk any time it checks an email queue. By default its set to '20', which is fine if your helpdesk has a small number of queues and doesn't routinely fetch large email attachments.

If, however, you find yourself with a large number of queues and regular email attachments exceeding 8 MB, we recommend changing this setting to '10' or lower.

#### **NOTE:**

If you do not adjust this setting to accommodate a large number of queues or large attachments, it can significantly impact the performance of your helpdesk.

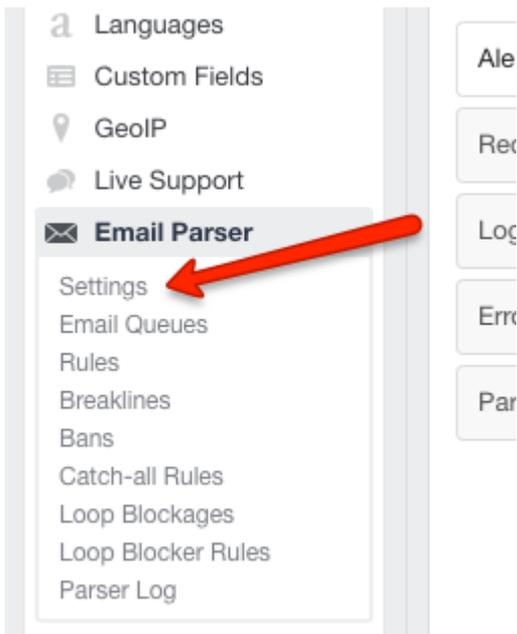
### » **Email size limit**

Next, on the list, this setting lets you restrict the size of each email coming into GFI HelpDesk. Any incoming email that exceeds this size limit is not fetched from your email server. These limits include the email's content and attachments.

The default is 2048 KB, and the only max is that it cannot exceed the `php_memory_limit` value set in your `php.ini` file. That being said, we do not recommend setting a high limit here. The larger the attachments you receive, the higher the risk that your helpdesk's performance suffers.

## » Prioritize email content type

You can find this setting in the middle of the Email Parser Settings section:



Screenshot 108: Email parser settings

Here, you can control whether GFI HelpDesk captures any HTML formatting from incoming emails. You can see that the page says '**Plain text highly recommended**' and while that used to be the case, capturing HTML formatting has become the standard for most of our users.

So, to allow GFI HelpDesk to capture HTML content from incoming emails set this to 'HTML.'

You have to visit Tickets and then Settings on the admin sidebar and make a couple of changes there. In the middle of the page, you are looking for these:

## Email Parser Settings

<b>Create a new ticket for replies sent to resolved tickets</b> Rather than reopening the ticket, the helpdesk will create a new ticket if the reply was sent to a resolved ticket. Note that this setting will override an email rule for <i>always create a new ticket</i> .	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Create multiple tickets for all email queues</b> If someone sends an email to multiple helpdesk email addresses, the helpdesk will create multiple tickets for each email queue address.	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Prioritize email content type</b> Most email contains two formats, <b>plain text</b> and <b>HTML</b> . The helpdesk will prioritize this content type when processing email rules. <i>Plain text</i> is highly recommended.	Plain text ▾
<b>Automatically convert encoding of emails</b> The helpdesk will automatically convert the encoding of incoming email to the default helpdesk character set.	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Prioritize reply-to above from addresses</b> The helpdesk will use the email address in the <b>reply-to</b> rather than the <b>from</b> email header. <b>Warning</b> - it is easier to fake <i>reply-to</i> , we do not recommend enabling this setting.	<input checked="" type="radio"/> Yes <input type="radio"/> No

Screenshot 109: Ticket settings

With Prioritize email content type plus the two HTML handling options set, GFI HelpDesk is able to capture any HTML formatting from incoming emails and render it in your support tickets.

### » Maximum email log size

The last setting back on the Settings: Email Parser page, this one lets you establish a maximum size (in kilobytes) for the email logs that GFI HelpDesk retains. Any parser log that exceeds this limit is discarded.

By default, this limit is set to '50,' but we recommend you increase it up to 5000 KB so that your logs for larger emails are also stored. Having these logs can be critical when trying to diagnose email parser issues.

## Restricting email queue to accept emails from registered users only

The email queue can be restricted to accept emails from registered users only. When enabled, non-registered users cannot send emails to that queue, and they are prompted to register at the help center first. This setting helps to fight spam emails.

This topic provides instructions on how to restrict the email queue to accept emails from registered users only.

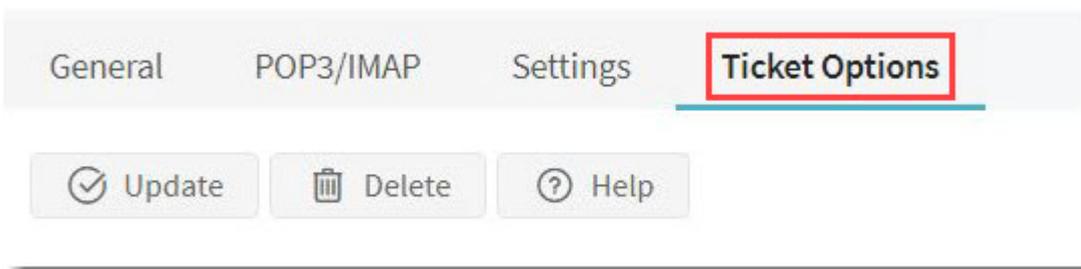
Follow the below process:

1. Sign in to GFI HelpDesk and go to the admin area.
2. Go to **Email Parser** and click on **Email Queues**.



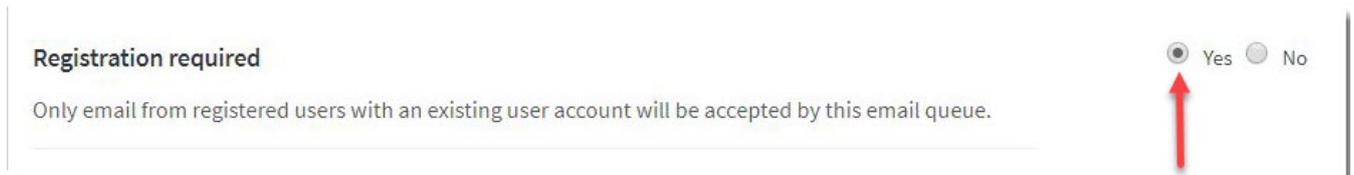
Screenshot 110: Click Email Queues

3. Click on the email queue address you want to configure, example: myqueue@myqueue.gfihelpdesk.com
4. Click the **Ticket Options** tab.



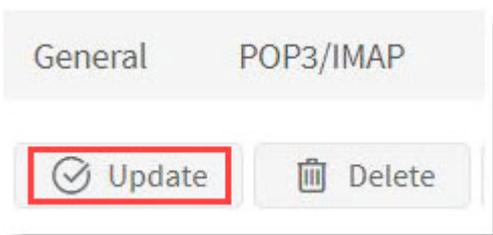
Screenshot 111: Click Ticket Options tab

5. In the **Registration required** section, select **Yes**.



Screenshot 112: Select Yes

6. Click **Update** to save the changes.



Screenshot 113: Click Update

## Preventing incoming emails with no subject from creating a ticket

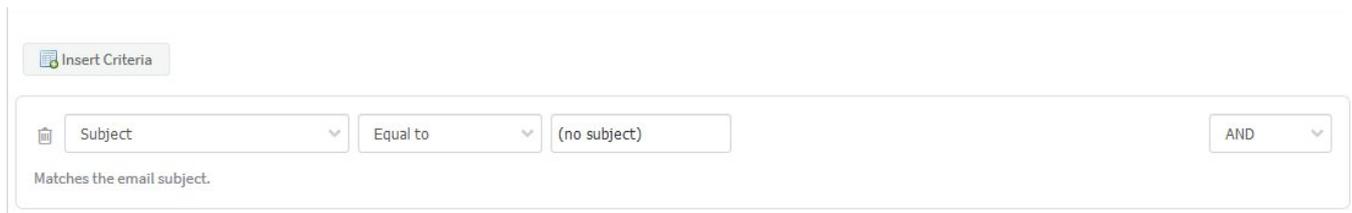
If you have incoming emails with no subject and you would like to ignore them to prevent to generate a spam ticket, you can create an email rule to discard them.

In this topic, you can learn the steps on how to set up a rule to accomplish this.

When GFI HelpDesk parses an email with an empty subject, it adds "(no subject)" to the ticket subject. We can create a rule to prevent this email from creating a ticket.

To create the rule:

1. Go to the **Admin** panel and navigate to **Email Parser > Rules > New**.
2. Choose criteria as **Subject - Equal to - (no subject)**.



The screenshot shows a web interface for setting criteria. At the top left is a button labeled 'Insert Criteria'. Below it is a form with three dropdown menus: the first contains 'Subject', the second 'Equal to', and the third '(no subject)'. Below these dropdowns is the text 'Matches the email subject.'. To the right of the form is a dropdown menu with 'AND' selected.

Screenshot 114: Set insert criteria

3. Under the **Actions** tab, select the required action which you want to perform on such tickets.
- After creating the rule, an empty subject email should no longer create a new ticket.

## Handling large emails in GFI HelpDesk

This topic guides you on how to handle large emails in GFI HelpDesk.

Theoretically, there is no limitation on email size to be fetched to the helpdesk. The email size would depend upon the resources available on the server hosting the helpdesk.

The helpdesk has the following settings which affect email file size:

- » By default, the value of Email Size Limit is set to 2048áKB (2áMB).
- » This defines the maximum size of email that can be fetched into the helpdesk; the helpdesk rejects any message which is above this size.

## Maximum number of emails to download in a batch

This can be accessed through **Admin CP > Settings > Email Parser** where the Email Size Limit can be found as well.

The setting defines the maximum number of emails that is fetched upon a single execution of the CRON script. If you want to fetch large emails, value for `Maximum number of emails to download in a batch` should be set to low. The default value is 20.

Example: 20 emails are fetched for each email queue on single execution of CRON script. The value should be kept low to prevent server overload and memory dump.

The value of `Email Size Limit` depends upon the below-mentioned PHP parameters:

- » `max_input_time`
- » `max_execution_time`
- » `memory_limit`
- » `post_max_size`
- » `upload_max_filesize`

These parameters are directly proportional to `Email Size Limit`; the higher the value, the more resources are required by PHP. Therefore, the settings mentioned above need to be increased in accordance with the server resources.

You can update incoming email attachment size by navigating to **Admin CP > Email Parser > Settings > Email size limit**.

## Preventing spam emails using Bayesian Filtering

*Bayesian* is the process of using a naive *Bayes* classifier to help train or untrain the helpdesk and identify e-mails on different parameters.

This topic shows how to prevent spam emails using *Bayesian Filtering*.

Follow the below steps:

1. Manage Bayesian from **Admin CP > Bayesian**.
2. Train or untrain the helpdesk to update or increase the value of the probability of incoming content respective to the categories.

The helpdesk can be trained on Bayesian using three different ways:

- » Workflows.
- » Mass Action of tickets.
- » From **Admin CP > Bayesian >Diagnostics**.

Multiple decisions can be taken on the basis of Bayesian probability values by:

- » Forwarding of incoming emails to a specific email address by creating the Pre Parser rules.
- » Routing the tickets to the specific department by creating the Post Parser rule.
- » Creating different Workflows to perform specific actions.
- » Creating SLA plans to meet specific requirements.
- » Spam filtering.

## Mail parser rule essentials for setting up email rules

A volley of emails comes in every few minutes and you are left wondering how to filter, categorize, sort and even ignore those unwarranted spam or bounce back emails.

Each mailbox has a unique set of ticket properties linked to incoming emails but when that becomes limiting to categorizing your emails, parser rules kick in.

This topic provides information on the mail parser rule essentials when setting up email rules.

### **NOTE:**

If you are migrating from another solution to GFI HelpDesk and you already had Email Rules set before, set them up in GFI HelpDesk to keep emails working as expected.

To set up email rules go to **Admin CP > Email Parser > Rules**.

**Mail Parser Rules** work on eligible emails. This means that any email which doesn't follow RFC guidelines is in the Bans List or cannot be parsed due to message size restrictions or any other technicality is not matched against these rules.

### **Message Size Limit**

- » Helpdesk message size limit (in kilobytes) is specified from the Email Size Limit setting under the Admin Control Panel: **Email Parser > Settings**.
- » The maximum allowed limit for On Demand Helpdesk is 10240 KB, that is 10 MB.

GFI HelpDesk customers can configure PHP parameters (in conjunction with required limit and actual server hardware) to support large size attachments parsing from server side. If the server cannot support it, the Helpdesk cannot parse the email.

## Rule criteria and action set can be segregated neatly into two sets

### Pre Parse criteria set:

- » Consider actual mail properties on the basis of raw mail headers, such as Sender email address and Destination email address amongst others.
- » Pre Parse criteria can be used to set any action set: Pre Parse or Post Parse.

### Post Parse criteria set:

- » Recognized by Post Parse postfix in criteria selector.
- » Cater to actual ticket properties set for the ticket which is created or to which the email is appended post parsing.
- » Post Parse criteria only work for Post Parse action set.
- » You can make use of Post Parse action set to assign emails matching certain criteria to particular staff members.

**Parser Rules** are checked against an incoming eligible email in ascending order of the value for `Execution Order`.

Once a rule matches, parser checks if *Stop Processing Rules* setting is disabled before proceeding to check the mail against other rules.

Refer to this **operator usage table** in case you are specifying multiple criteria:

Criteria 1	Criteria 2	Criteria 3	Means
AND/OR	NA	NA	Criteria 1 should be true.
AND	AND	OR	All criteria must match
AND	OR	OR	Criteria 1 must hold and either of Criteria 2 or Criteria 3 be true
OR	OR	OR	Any criteria must hold.

## Remove specific attachment types or big attachments while parsing emails

1. Enable the `Use file attachment type whitelist` setting from Admin Control Panel under **Tickets** and **Settings** in the sidebar.
2. Make the required changes from **Tickets and File Types**.

## Editing automated email message text

All automated emails in helpdesk can be personalized according to the needs of an organization.

With the availability of different language phrases it becomes handy to modify the content of automated emails such as autoresponder, registration email, survey email.

This topic details the use of available language phrases to customize the various types of Automated Email text.

### Modifying language phrases

Language phrases of a particular language can be modified as follows:

1. Navigate to admin **Interface > Languages > Search**.
2. Enter the text (of an automated email) that you want to search, or its identifier.

3. Select the type, language within which you want to search the query, and click **Search**.

4. On search, you get a page with two Text Areas:

- » The **Upper Text Areas** shows the original content of the searched language phrase which cannot be edited.
- » The **Lower Text Area** also shows the same content (if it is not modified before).

5. Enter or update the content in the **Lower Text Area** and click **Update**.

The language phrases associated with various types of automated email messages which could be customized are listed below.

#### Registration email

The users receive a registration email with their profile details (including their password), once they register. There are two different registration emails:

- » One that is dispatched when a user registers from Client Interface manually.
- » Other when a client is registered automatically when they submit a ticket for the very first time.
- » The two different language phrases are listed below:
  - » `registersuccessemail` - This is used when a user registers from Client Interface.
  - » `registerwelcomeemail` - This is used when a user is registered automatically in help desk when they submit a ticket for the first time.

#### Autoresponder email

It is dispatched as an acknowledgment to the ticket creator confirming the receipt of the ticket in the help desk. Autoresponder email phrases include:

- » `arintro`
- » `arsubfooter`
- » `arfooter`

#### Survey email

The **Survey email** is sent to the user asking for their rating and feedback when their ticket is moved to Closed status (provided **Send satisfaction survey email** option is enabled, under **Admin Interface > Tickets > Statuses > Closed > Options**).

Languages phrases used in Survey email are:

- » `surveyintro`
- » `surveydescription1`
- » `surveydescription2`
- » `surveydescription3`
- » `surveycta`
- » `surveysubfooter`
- » `surveyfooter`

#### Auto close email

**Auto Close** mechanism is used to update the customers informing them that you are waiting for their response on the respective ticket, and further, to mark the ticket as resolved after defined hours.

If you have an active **Auto Close** rule in your help desk, your users receive ticket inactivity (**Auto Close pending**) and closure (Auto Close final) notification emails respective to rule criteria.

### Auto close pending

Language phrases include:

- » acpendingintro
- » acpendingsubfooter

### Auto close final

The final language phrases include:

- » acfinalintro
- » acfinalsubfooter

### Registration required email

It is sent if you have enabled **Registration Required** option under **Email Queue** settings for an email queue (**Admin Interface > Email Parser > Email Queues > select the email queue > Ticket Options**). Language phrases used in this email are:

- » regemailrejectintro
- » regemailrejectsub
- » regemailrejectfooter

For information about modifying the variables included in automated emails, see [customizing notification email templates](#).

## Changing outgoing email addresses for automated emails

You may have one, two or multiple email addresses (queues) through which your customers contact you. The email channel probably handles the majority of helpdesk communication. To correspond to customer queries, you also have a default return email address, and staff email addresses that are used in the outgoing emails.

This topic describes which email address is used/linked with which outgoing email and how you should configure it so that every single user reply reaches your helpdesk.

The following table details the outgoing email addresses linked with various actions and where to change these address from the Admin Interface:

Type Of Email	Outgoing Email Address used in Automated Emails
User Registration	Default Return Email Address mentioned at <b>Admin Interface &gt; Settings &gt; General</b>
User Notifications	Default Return Email Address mentioned at <b>Admin Interface &gt; Settings &gt; General</b>
News subscription	Default Return Email Address mentioned at <b>Admin Interface &gt; Settings &gt; General</b>
Mail Parser rule action	Email Queue Address mentioned at <b>Admin Interface &gt; Email Parser &gt; Email Queue</b>
Autoresponder	Email queue Address mentioned at <b>Admin Interface &gt; Email Parser &gt; Email Queue</b>
Auto Close	Email queue Address mentioned at <b>Admin Interface &gt; Email Parser &gt; Email Queue</b>
Ticket Notifications	If the ticket department is linked to an email queue, then email queue address is used otherwise the <b>Default Return Email address</b> is used.

Type Of Email	Outgoing Email Address used in Automated Emails
Survey	If the ticket department is linked to an email queue, then email queue address is used otherwise the "Default Return Email address" is used.
Staff replies	If the ticket department is linked to an <b>email queue</b> , then email queue address is used, or the Queue Overrides specified in the email queue settings otherwise the <b>Default Return Email address</b> is used. Staff can also select their email address in the From drop-down list.

**Note:**

If you want to disable any of the automated emails. For more information about , see [Disabling automated emails](#).

## 4.5 Custom templates

Master GFI HelpDesk's custom templates, so you can fine tune your customers' support experience.

Topics in this section:

---

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### 4.5.1 Managing your template modifications

Customizing your GFI HelpDesk templates gives your team control over the appearance – and in some cases, the functionality of your emails and support center.

Any time you update, upgrade or reinstall your help desk, you have to back up and re-implement any template modifications you have made.

This section provides an overview of the template backup and restoration process and explains how to restore your template modifications after an update.

**NOTE:**

The process of restoring your templates is the same, whether you are updating, upgrading, downgrading, installing, migrating, etc.

**Below are the steps for template modification:**

#### Step 1: Understanding how to maintain your template modifications

The safest way to do this is to follow these steps:

1. Before starting the update process, export a backup copy of any modified templates.
2. Run through the update, which includes a fresh copy of all of GFI HelpDesk's templates – but it does not overwrite any of your changes.

3. Once you are up and running, go into the Admin Control Panel and review your templates. Any modified templates is marked as Out-of-date.
4. After double-checking that you have all your backups in hand, click Restore to accept the fresh templates and overwrite your modified ones.
5. For each template that has been updated, export a copy, which gives you a local version of both the updated template and your modified version of the previous template.
6. Using a Diff & Merge tool, review your changes, and incorporate them into the updated template.
7. Once you merge your changes, copy your modified, up-to-date template, and paste it into GFI HelpDesk.
8. Repeat the compare and merge process for any templates you have modified until you are fully up-to-date.

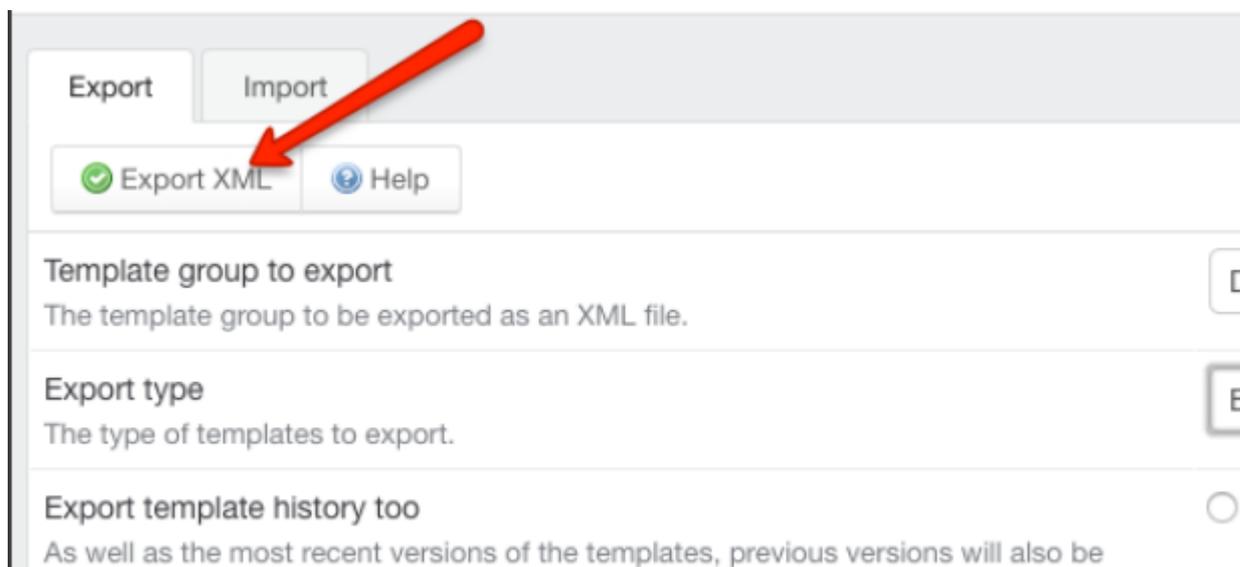
## Step 2: Preserving your template modifications

For these steps, you need admin access to your GFI HelpDesk, as well as your server, if you are running Download.

## Step 3: Backing up your modifications

Your first step is to make sure you have full local backups of any templates that you have modified:

1. Sign in to the Admin Control Panel.
2. Click Templates and click Import/Export in the sidebar.
3. From the Template group to export drop-down, select the group you want to back up.
4. From the Export type drop-down, choose Export modified templates.
5. Click the Export XML button.



Screenshot 115: Backing up modifications

6. Save your backup.

## Step 4: Restoring fresh template versions

After updating, review your templates. For any that are modified, they have to be manually overwritten with the fresh templates that came over while updating.

1. Sign in to the Admin Control Panel.
2. From the side bar Click **Templates > Restore**.

3. From the **Template group** drop-down, select the group you want to update.
4. Next to **Out of date**, select **Yes** to find a list of all of your out-of-date templates.
5. Click **Search**.

**Restore Templates**

Search Help

**Template group** Default  
The templates of this template group will be checked for errors.

Find Templates

**Modified** Yes  
 **Out of date** Yes  
 **Original** Yes

Screenshot 116: Restoring fresh template version

6. A list of any of the templates, that has been modified and need to be updated to the newest versions, is displayed. Select all the templates by clicking the checkbox in the header row.

**Restore Templates**

Restore Help

Restore templates to latest original versions: Default

Template Name

Screenshot 117: Select all the templates

**NOTE:**

Make sure you have local backups of your modified templates.

7. When you are ready, click **Restore** on the page to overwrite your modified templates with the new versions.

### Step 5: Comparing, Merging and Pasting in Your Modifications

The complexity of this final step depends on how heavily modified your templates are. If there are just a few one-line changes, it should be pretty quick. More substantial changes might take longer to incorporate.

Whatever is the case, the process is the same:

1. Go to the **Admin Control Panel > Templates > Import/Export**.
2. From the **Template group** to export drop-down, select the group you want to modify.
3. Leave the **Export type** drop-down set to **Export all templates**.
4. Click **Export XML**.
5. Save your exported files to the same place you have your modified template backups.
6. If you do not have one already, download a Diff tool, which helps you to compare the two versions of each template.

**NOTE:**

Many development tools like Xcode, Eclipse, Visual Studio, etc. – have different utilities built-in, but you can also use standalone tools like Meld (free, OS X), Kaleidoscope (paid, OS X), or Beyond Compare (paid, cross-platform).

7. For each template you have modified, run a Diff between the customized version and the new default version.
8. Scan through the Diff and merge your changes into the fresh template.

**NOTE:**

You may need to edit your modifications to reconcile them with the new template.

9. When you have incorporated all your modifications into the updated template, save the XML file.
10. Repeat the previous three steps for every template you have modified.
11. Go back to the GFI HelpDesk Admin area. Click **Templates > Templates sub-option** to edit your templates directly.
12. From the **Template group** drop-down, select the group you want to update.
13. Find your first modified template in the list and click to open it.
14. Select the entire template contents and delete them.
15. In your local XML file with the modified, up-to-date template contents, select everything and copy it.
16. Paste it into the Template Contents text area in GFI HelpDesk.

Template version number	1.00.00 (Current)
Save a new template version	<input checked="" type="radio"/> Yes <input type="radio"/> No
Describe your changes	<input type="text"/>
Template Contents	<input type="text"/>



Screenshot 118: Paste into template contents text area

17. In the Describe your changes text box, enter a changelog message. For example - "Restoring template modifications after upgrading to 4.80."
18. Click **Save & Reload** to save your changes.

19. Repeat the previous six steps for every template you have modified.

20. When you have made all your template updates, you have one last step – rebuilding your help desk cache, which you can do by clicking Diagnostics in the sidebar and then Rebuild Cache.

Your template modifications are now reflected across your help desk and support site.

## 4.5.2 Understanding how custom templates work

Here you can learn about the commonly used template sets, their purpose, and how they can be applied to your system.

### Note:

It is recommended to test any template customizations on a template group which has been added solely for testing purposes (and has not been announced publicly). This ensures that any tweak can be tested and final results are visible to you prior to applying the changes to a live template group.

A template group consists of a set of templates dealing with front-end layout, design, and outgoing emails. Template sets can be accessed via **Admin interface > Options > Templates > Templates**.

Below is a list of commonly used template sets, important templates they contain, and purpose of those templates for your reference:

### General

This template set contains templates dealing with support center layout and those templates which are not app specific.

Important templates	Purpose
header	Support Center header (general layout of elements)
clientcss	Original CSS file for a template group. Controls the look and feel of the template group.
customcss	Empty CSS file. Any code entered here overrides original code specified in clientcss. <a href="#">Learn more about editing templates best practices</a> .
emailnotification_*.html emailnotification_*.text	Staff notification email. Check available <a href="#">variables</a> here.

### Tickets

This template set contains templates dealing with ticket submission and outgoing ticket app specific emails.

Important templates	Purpose
submitticket_departments	Department selection page on Support Center.
submitticket_form	Ticket submission form.
viewticket	
viewtickets_list	Ticket list display.
email_*.html (For example, email_autoresponder.html)	Outgoing emails. Name imply their purpose. HTML is only allowed in templates ending with HTML postfix.

### Live support

This template set contains templates dealing with live chat badges and chat window specific templates.

Important templates	Purpose
chatheader	Chat window header (general layout of elements)
chatlanding	Online chat window
leavemessage	Offline chat window
proactivechatdiv	Proactive chat box
chatbadge	Site badge
chatimage	Live chat button

## Building blocks of templates in helpdesk and editing support available

Template sets in helpdesk are built upon Dwoo Template Engine. HTML and JavaScript codes are supported for modification. HTML comments are used for commenting in code. JavaScript is not supported in email-specific templates and HTML is not supported in email templates which are meant for text content.

The PHP code can be enabled for templates by On Premise clients by un-commenting the following constant in config.php under `__swift\config` in the document root of helpdesk:

```
//define('SWIFT_ENPHP_TEMPLATES', true);
```

Templates in helpdesk consist of the following building blocks:

### Variables

Variables contain values for various properties that are based in real-time and can be used as such or with logical conditions per the requirement. These variables are specified and assigned to a template in the source code.

When working in an inactive template group, you can view assigned variables for a template by adding `<{ dump }>` variable to the relevant template and then viewing the output on relevant location on Support Center or in an email dispatched by helpdesk.

#### Note:

The `<{ dump }>` variable contains sensitive information and we strongly suggest that this is NEVER EVER used on a live template group.

### Types of variables:

- » Stand-alone variable

```
<{$variablename}>
```

For example: `<{$_templateGroupPrefix}>`

- » Variables stored in a container (array)

```
<{$containername[element]}>
```

For example: `<{$_languageItem[isenabled]}>`

- » Language phrase variables

Language phrases available in language packs (identified by identifier value) can be referred to in templates by following a generic format:

```
<{$_language[identifier]}>
```

For example: `<{$_language[arintro]}>`

Language phrases can be added to an existing language pack via Insert Phrase button from **Admin > Options > Languages > Phrases**.

We recommend inserting a new phrase with a unique identifier to all language packs in your helpdesk to ensure that language selection does not affect language phrase from getting called or does not result in an undefined index error.

**Note:**

All variables (including language phrase variables) are case-sensitive.

## Logical conditions

You can make use of if-else statements making use of variables matching using logical operators to control the display of particular sections of code.

Generic format for if-else:

```
<{if $variable operator 'value1'}>
```

```
//Code block to be executed  
<{elseif $variable operator 'value2'}>  
  
//Code block to be executed  
<{/if}>
```

An example:

`__activeLanguageID` variable contains language ID selected for **Support Center**. This piece of code, for example, can be placed in the header template.

```
<{if $__activeLanguageID == '1'}>  
You are currently browsing in 'English (U.S.)'  
<{elseif $__activeLanguageID == '2'}>  
You are currently browsing in 'Deutsche (de)'  
<{else}>  
You are browsing but not in 'English (U.S.)' or 'Deutsch (de)' language  
<{/if}>
```

## Blocks and functions

On Premise clients can check compiled **Dwoo**-specific functions from under `__swift\thirdparty\dwoo\plugins\builtin` in the document root.

**Dwoo** provides documentation for [blocks](#) and [functions](#).

An example

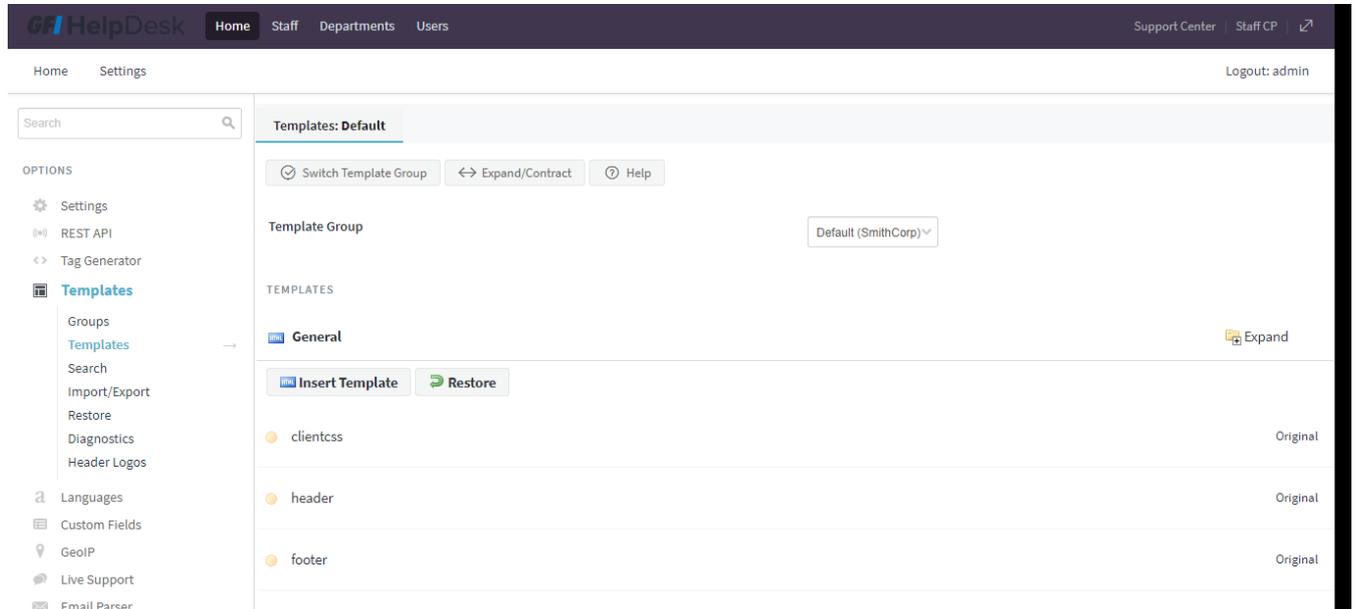
You can display Reply due counter to a client (making use of `date_format` function), by adding this piece of code to the **viewticket** template under **Ticket** group:

```
<{$_ticket[duetime]|date_format: "%A, %B %d, %Y %R %Z"}>
```

### 4.5.3 Best practices for editing GFI HelpDesk templates

You can customize the complete look and feel of the support center using the template system. The template system (found in the admin control panel under Templates) lets you modify the style, content, and layout of the templates.

The support center is put together using several templates. For example, there is a template for the header, footer, and one for the CSS (clientcss).



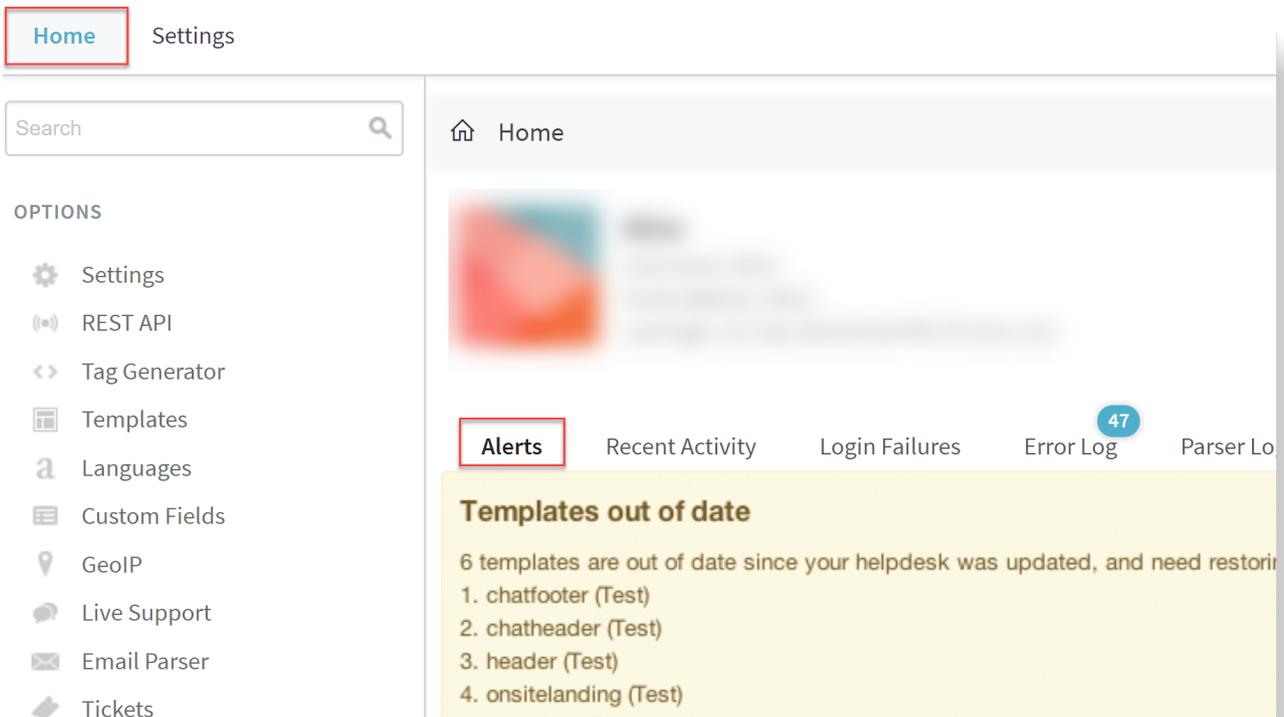
Screenshot 119: Templates navigation

Below are some best practices for template customization:

#### Keep track of customizations for template restores

As part of an update, GFI HelpDesk may make a change to the support center templates.

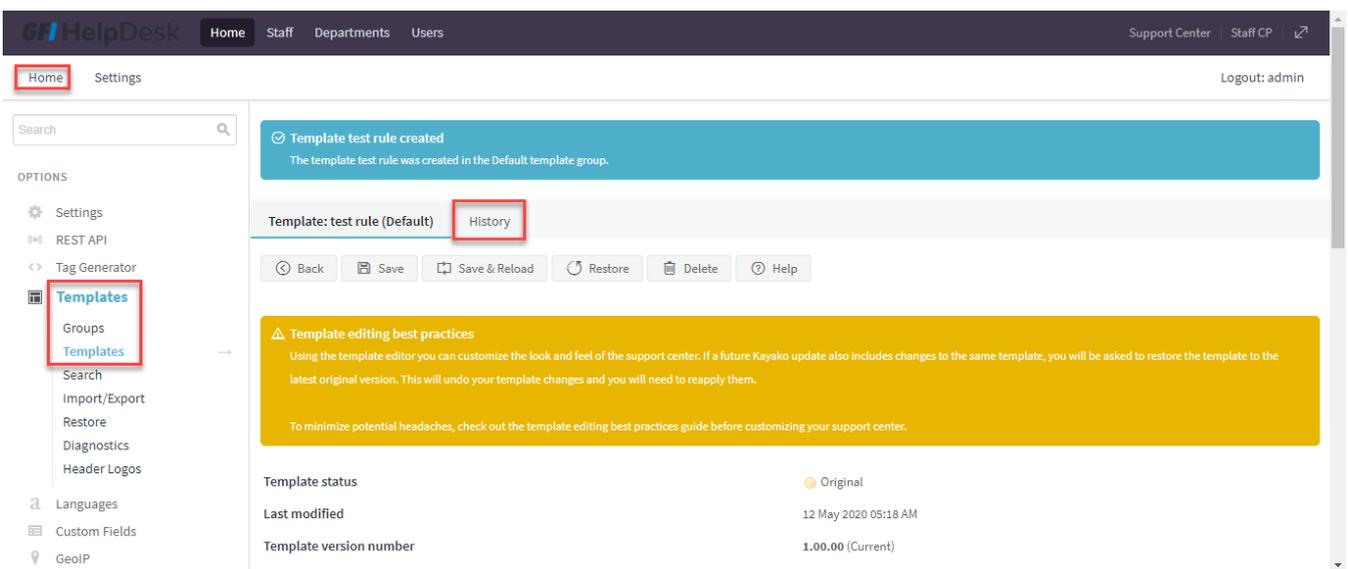
When you update your helpdesk, GFI HelpDesk does not automatically apply these changes to your templates. Instead, it marks the respective template as out of date and asks you to restore the template to its original version. Until this is done, the support center does not reflect the latest update to your helpdesk.



Screenshot 120: Checking on Alerts

The reason why GFI HelpDesk does not do this automatically is to give you a chance to check if you have customized the template that needs to be restored. If you have customized the template, you then have the opportunity to make a note of the customizations made so that you can reapply them once the template has been restored.

GFI HelpDesk saves a history of your template changes. This history is available even if you restore the template. After you have selected your template (**Home > Settings > Templates > Group > Templates > General > Select template**) you can choose History, and you'll be able to compare between versions allowing you to quickly identify and re-apply your changes.



Screenshot 121: History of template changes

Find out more about **restoring templates** and read below to find out about template customizing best practices.

### Edit as few templates as possible

It is important to consider carefully how to achieve the customizations you want for your support center, and to consider

whether modifying the HTML in templates is necessary.

There are two reasons you'll want to modify as few templates as possible:

- » The more templates you change, the more inconvenience you can face if GFI HelpDesk makes a change to a template as part of an update (which means that the template would be out of date and would need to be restored to its latest original version and your customizations needs to be reapplied).
- » The more templates you change, the more difficult it is to isolate any problems.

## Keep your CSS Changes in the 'customcss' template

All of the CSS for the support center is contained in one template called `clientcss`.

Because this template covers all of the support centers, GFI HelpDesk may modify it between helpdesk updates to add new functionality or fix bugs.

Therefore, we suggest that any CSS changes you wish to make should be made in the `customcss` template. We'll never make changes to this template; it is empty and intended solely for your custom CSS. It is loaded after `clientcss`, meaning anything in `customcss` overrides `clientcss`.

For example, by default `clientcss` includes a statement to style the title of knowledgebase articles:

```
kbtitle {
  font-size: 30px;
  font-weight: 200;
}
```

If you wish to increase the font size, rather than modifying this statement in `clientcss`, you should override the statement using the `customcss` template by adding:

```
.kbtitle {
  font-size: 40px;
}
```

Because `customcss` is loaded after `clientcss`, the element `kbtitle` ends up with a **font-size** of 40px and a **font-weight** of 200.

## Try to use CSS rather than editing the HTML

For example, you want to hide the author avatar shown on knowledge base articles. In the template knowledge base article you find the following HTML:

```
<div-
class-
="kbavatar"><imgsrc="/Base/StaffProfile/DisplayAvatar/"align="absmiddle"border=
```

Rather than modifying the template directly by deleting this HTML, you could create a new CSS statement in the `customcss` template to hide it:

```
.kbavatar {
  display: none;
}
```

## 4.5.4 Customizing notification email templates

Customizing the templates that govern your notification emails allows you to personalize the content that appears in each email.

This can be very useful when choosing which content is most relevant to your staff versus your customers.

This section gives you a quick overview of notification email templates and how the customization process works. It also describes the steps to personalize your own email notification templates.

---

---

### Email template variables

Most outgoing emails from GFI HelpDesk are rendered through their respective email templates.

Generally, these templates include language phrases, plain text, HTML/CSS, logical statements, and template variables. This means that you have a lot of options for controlling how the notifications appears to you and your customers.

Variables can be used in email templates to fill in specific content elements related to either a user or a ticket.

For example, if you want each notification email to start with Dear [Customer's Name], you can use a variable in the email template to supply the Customer Name for each recipient.

The notification email templates being discussed here are:

- » staff notification template
- » user notification template

Additionally, each template has two versions:

- » HTML version
- » plain text version

You can set your preference for which format to use in the admin control panel, and then modify the matching template.

#### Note:

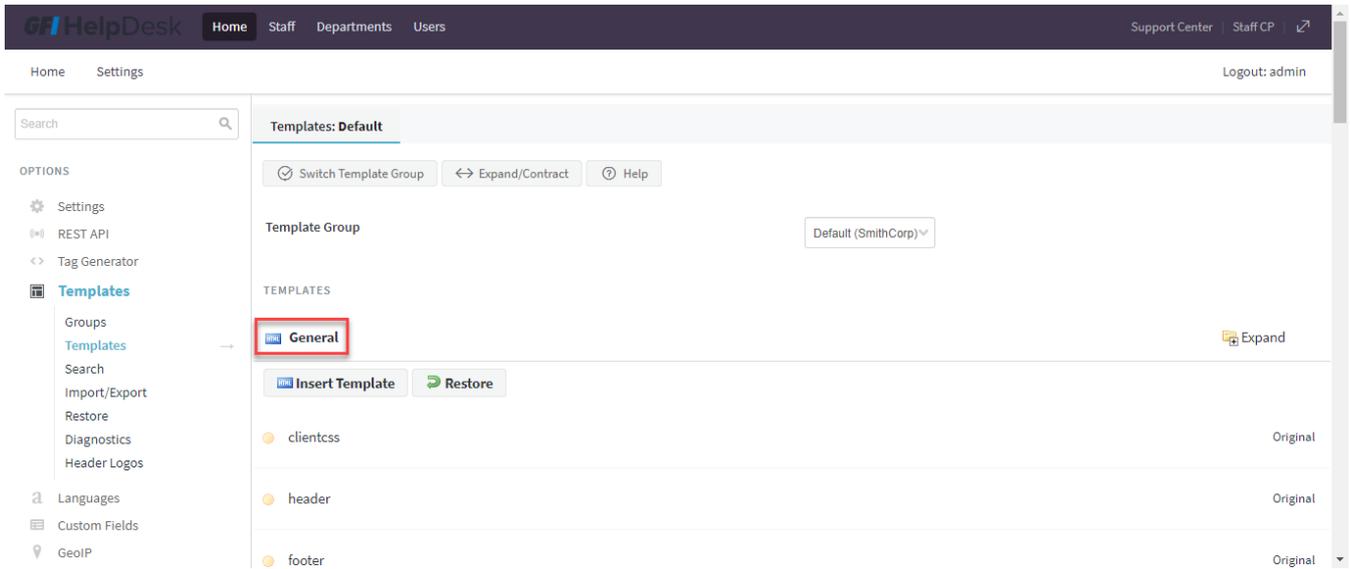
Each of these starts out with just a single variable, called either `$_notificationContentsHTML` or `$_notificationContentsText`, depending on the template.

These variables contain the default contents of your notification emails. If you ever want to restore the default contents for your emails, you can just delete your changes and replace them the default variable.

### Modifying notification email templates

You can customize your notification template by following these steps:

1. Log in to the GFI HelpDesk admin control panel.
2. Click on **Templates** in the left navigation bar.
3. Under that, click **Groups** and select the required template group.
4. In the Edit Template Group window that opens, click the Templates button.
5. Click **General** to expand the category.



Screenshot 122: Expand the general category

**Note:**

We are going to start with the staff notification templates, which are called `emailnotification_text` for plain text emails and `emailnotification_html` for HTML emails.

● emailnotification_text	Original
● emailnotification_html	Original

Screenshot 123: Staff notification templates

6. Let us start with `emailnotification_text`. Click on it from the list to open the template for editing.

7. In the **Template Contents** text area, you see the default variable: `{$_notificationContentsText}`. Select and delete this variable:

Template: emailnotification\_text (Default) History

Back Save Save & Reload Restore Help

**Template editing best practices**

Using the template editor you can customize the look and feel of the support center. If a future Kayako update also includes changes to the same template, you will be asked to resave your template changes and you will need to reapply them.

To minimize potential headaches, check out the template editing best practices guide before customizing your support center.

**Template status** ● Original

**Last modified** 29 May 2019 12:55 AM

**Template version number** **1.10.18** (Current)

**Save a new template version**  Yes  No

**Describe your changes**

TEMPLATE CONTENTS

`<{$_notificationContentsText}>`

Screenshot 124: Delete variable

8. Now, to add your preferred content to the template, you can add any combination of the following variables:

Simply copy them and paste them into the Template Contents window in the order in which they should appear.

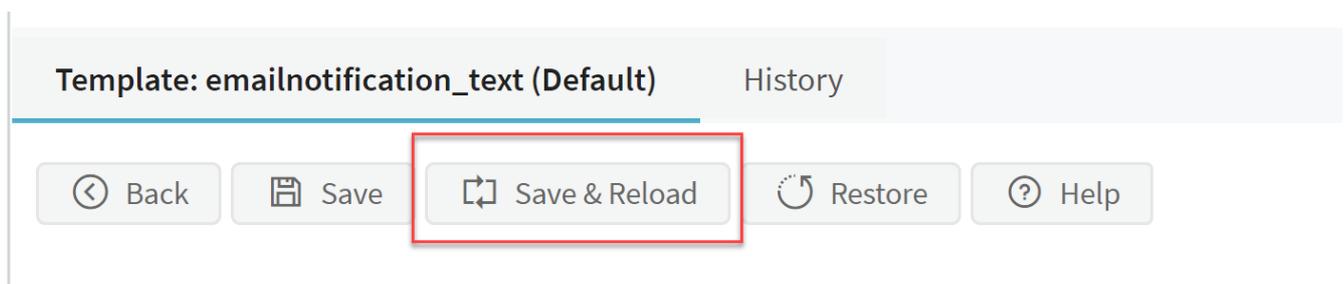
Variable	Function
<code>&lt;{\$_ticketNotification[subject]}&gt;</code>	Ticket subject
<code>&lt;{\$_ticketNotification[ticketid]}&gt;</code>	Ticket ID/mask
<code>&lt;{\$_ticketNotification[ticketlink]}&gt;</code>	Ticket hyperlink
<code>&lt;{\$_ticketNotification[fullname]}&gt;</code>	Customer's full name
<code>&lt;{\$_ticketNotification[email]}&gt;</code>	Customer's email address
<code>&lt;{\$_ticketNotification[phoneno]}&gt;</code>	Customer's phone number
<code>&lt;{\$_ticketNotification[creator]}&gt;</code>	Creator (that is, user/staff)
<code>&lt;{\$_ticketNotification[department]}&gt;</code>	Ticket department
<code>&lt;{\$_ticketNotification[owner]}&gt;</code>	Ticket owner's full name
<code>&lt;{\$_ticketNotification[type]}&gt;</code>	Ticket type
<code>&lt;{\$_ticketNotification[status]}&gt;</code>	Ticket status
<code>&lt;{\$_ticketNotification[priority]}&gt;</code>	Ticket priority
<code>&lt;{\$_ticketNotification[slaplantitle]}&gt;</code>	SLA plan on ticket
<code>&lt;{\$_ticketNotification[templategrouptitle]}&gt;</code>	Template group used

Variable	Function
<{\$_ticketNotification[created]}>	Ticket creation date & time
<{\$_ticketNotification[updated]}>	Last activity date & time
<{\$_ticketNotification[userorganization]}>	User's organization name
<{\$_ticketNotification[changedby]}>	The person who made changes
<{\$_ticketNotification[changes]}>	Changes that took place
<{\$_ticketNotification[content]}>	Last ticket post contents
<{\$_ticketNotification[duedate]}>	Reply due date & time
<{\$_ticketNotification[resolutionduedate]}>	Resolution due date & time

Custom fields:

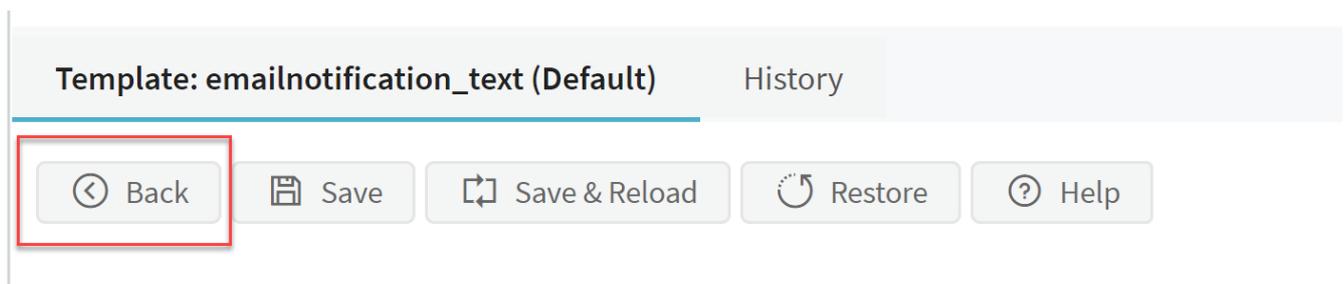
Variable	Function
<{\$_customFields[GroupName][FieldName]}>	Custom field data

9. Click the Save & Reload button.



Screenshot 125: Save & reload

10. Next, to configure the **emailnotification\_html** template, click the **Back** to return to the list of templates.



Screenshot 126: Click back

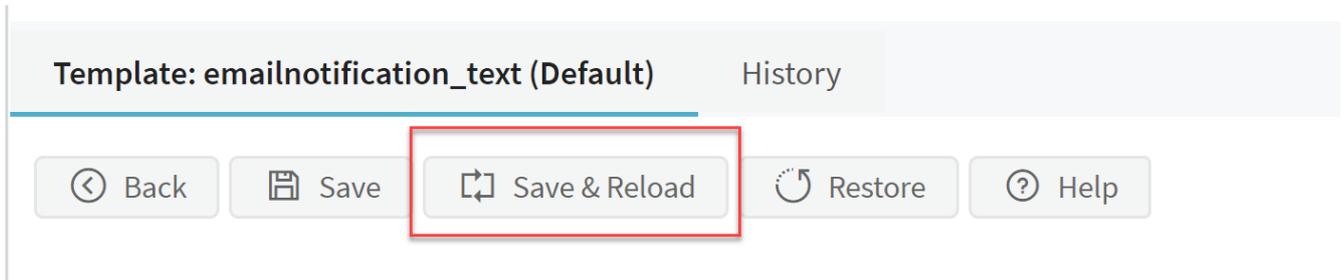
11. Click **emailnotification\_html** in the list to open it for editing.

● emailnotification_text	Original
● emailnotification_html	Original

Screenshot 127: Click emailnotification\_html

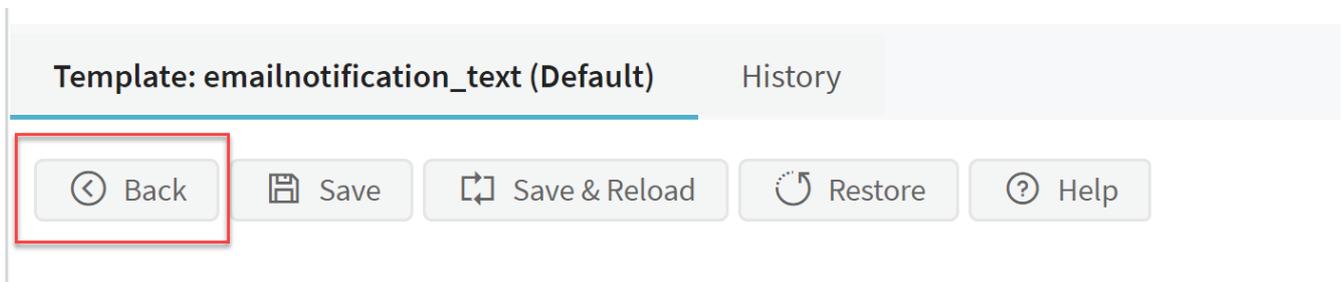
12. Look for variable `<{$_notificationContentsHTML}>` and delete it, and add your own variables, as in step 7 above.

13. Save the Template changes by clicking the **Save & Reload** button on top.



Screenshot 128: Click Save and Reload

14. Click the Back button to return to the list of General templates.

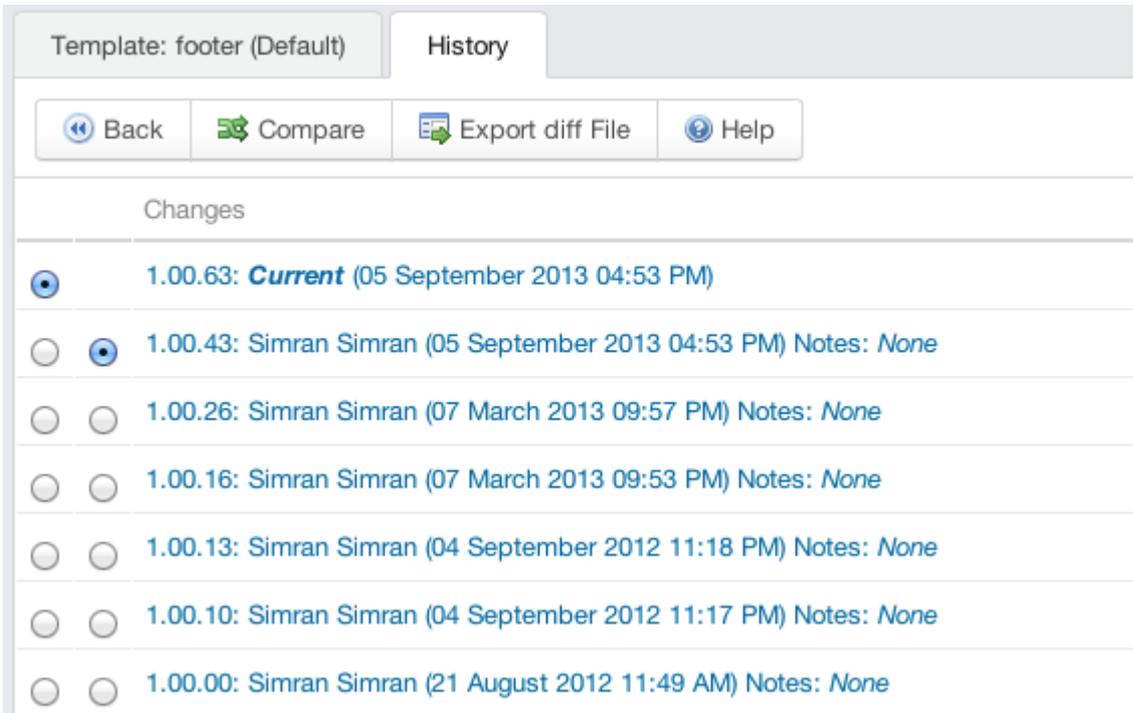


Screenshot 129: Click Back

15. To edit the user notification email templates, you can follow exactly the steps as above, but you're looking for **email-notificationuser\_html** and **emailnotificationuser\_text**. The same variables are supported.

#### 4.5.5 Reviewing template editing history and comparing versions

This topic provides valuable information about reviewing the template editing history and comparing template versions. The figure below displays how a history tab looks like:



Screenshot 130: History tab

The history tab shows the changes made to the selected template. The following change information can be retrieved:

- » Version changes and the current version
- » Staff user that made the changes
- » Date and time when the changes were made
- » Changelog notes

### Compare Versions

- » The template comparison tool allows you to visually compare templates, and it highlights the section that has been changed in the template.
- » You can view, compare, revert, collaborate and track template changes.
- » Click Compare and you are presented with the comparison output for that particular template. The following example shows the comparison between the changes made to the footer template.



Screenshot 131: Compare versions

- » In the figure above, the left-hand side shows the original code of the footer template, and the right-hand side shows the modified code.
- » It clearly shows that some code has been inserted on line number 4, hence making it easy to track and revert the changes.

## Export diff File

- » The export diff tool exports the template code, as a patch file, that has been included or excluded from the original.
- » A + shows the lines or white spaces added and a - shows the lines that were present in the original but has been excluded during modification.
- » The figure below shows an example template code in an exported file.

```
1 @@ -1,9 +1,9 @@
2 -<{$_language[nwsubconintro]}>
3 -
4 <{$_swiftPath}>index.php?/News/Subscriber/Unsubscribe/<{$_subscriberEmail}>
5
6 -<{$_language[nwsubfooter]}>
7 +
8 +
9
10 <{$_companyName}>
11 -----
12 <{$_language[supportcenterfield]}> <{$_swiftPath}>
▶ 13 +<{$_language[nwsubfooter]}>
```

Screenshot 132: Export diff file

## 4.5.6 Customizing support center look

This topic provides instruction on how to customize the look of your support center.

To change the look and feel of the client support center, modify the required templates from the admin control panel:

- » Login to Admin Control Panel and go to **Templates > Groups > Templates**. The associated templates are `clientcss` and `header`.
- » Templates can be modified to hide the **Search** bar or Loginbox or Subscribe option.
- » The widgets can be hidden from Admin Control Panel > Widgets.

Client support center and Control panel logos can be changed from:

- » Admin control panel > Templates > Header Logos.
- » The logos must fit inside 150px (width) by 24px (height).

## 4.6 Advanced configuration

Turn here for advice on GFI HelpDesk's APIs, integrations, and mobile apps.

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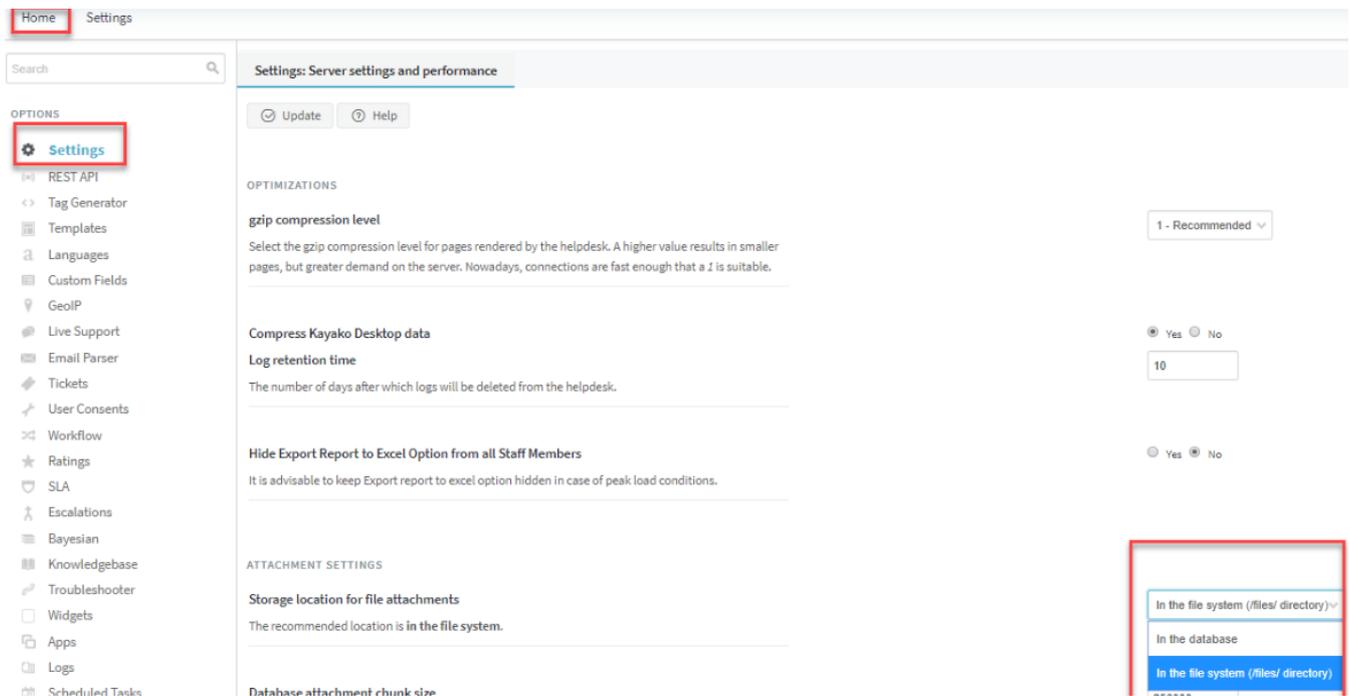
## 4.6.1 Purging attachments - Overview

This section describes the process to purge attachments.

The **Maintenance** area of the admin control panel allows you to do the following:

### » Purge Attachments

The attachments are stored in the database or the Files directory depending upon the setting. Such setting is done in **Admin CP > Settings > Server setting and performance > Storage location for file attachments**. To save the database space or file space, older/unwanted attachments can be purged.



Screenshot 133: Purge attachments

### » Move the ticket attachments from the database to files directory and vice-versa

- » If the attachments storage location is set to database, then over the time the database size tends to increase, so you can move all the attachments stored in the database to the Files directory, and free up the space.
- » If the attachments storage location is set to files directory, then you need to provide separate permissions to the files directory, and it is not feasible in some cases due to strict security policies. So, you may move all the attachments which are downloaded earlier in the files directory to the database. Also, in some cases, you do not want separate scripts implemented on your servers (due to heavy resource utilization) to take the backup of the support desk database and the files directory separately. Hence, you may move all the email attachments to the database and implement scripts to backup the database only.

## Purging process

This utility allows you to search for attachments that match one or a set of file criteria and purge them.

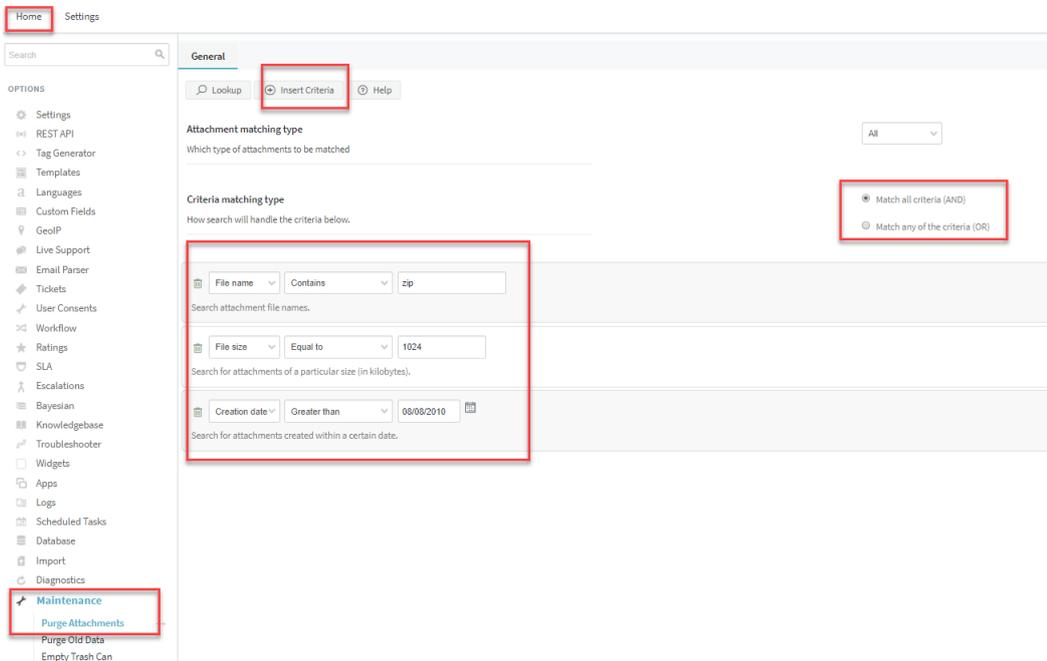
In order to view and manage the support desk attachments, follow the below steps:

1. Navigate to **Admin CP > Maintenance > Purge Attachments**. A search and criteria builder form is displayed.
2. Click on **Insert Criteria** to enter a single or multiple search criteria. The search criteria can be based on the following fields:
  - » **File Name:** You can define a string that the search engine can search file names for (including their extension). For example, the criteria can be - Any file that contains the string "zip".
  - » **File Size:** You can define a file size (in Kilobytes, where 1024 Kilobytes is equal to 1 Megabyte). For example, the criteria can be - Any file that has a file size that is greater than 1024 KB.
  - » **Creation Date:** You can define a creation date for a file. For example; the criteria can be - Any file that was created before 08/08/2010.

3. You need to select the grouping method (**AND/OR**) if you are using more than one criteria fields for the search.

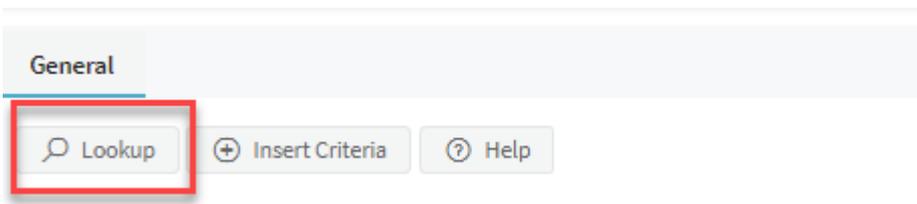
» If set to **Match All** criteria, the parser rule only matches a file if all of the criteria fields are true for that ticket (**AND** logic).

» If set to **Match Any** criteria, only one of the criteria fields needs to be true for this parser rule to match a file (**OR** logic).



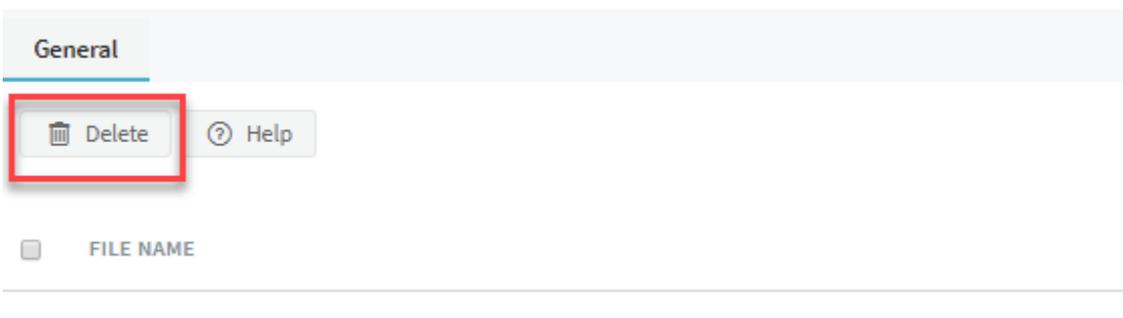
Screenshot 134: Insert criteria for purge

» Once the search criteria is set, click **Lookup** to search all the files matching that criterion.



Screenshot 135: Click lookup

» Once all the files are listed which satisfy the criteria, select them all by clicking the check box in front of them and click **Delete**.



Screenshot 136: Click delete

**Note:**

The attachments once deleted can not be recovered, not even from the database tables. So, check and confirm the files lined up for deletion before clicking **Delete**.

4. You get a success message, confirming the deletion of the selected files.

**Notes:**

- » Purging attachments removes the attachments from tickets as well from Knowledgebase articles.
- » If you wish to delete it only from tickets, you can either upgrade your GFI HelpDesk to the latest version to select the section; or just let us know; we can share the source code to be tweaked.

## 4.6.2 Accessing GFI HelpDesk diagnostic tools

The diagnostics area of the administrator control panel provides access to useful server and installation information that helps the support staff debug and troubleshoot issues faced during support desk operation.

Server with Support Desk installation generates most of the diagnostic information. Thus, some areas of the diagnostic tools may be brief in documentation as they are out of the scope of this guide.

To access the support desk diagnostics area, login as admin and go to **Options > Diagnostics**.

Below are the debug tools available:

### Active Sessions

This section displays a list of the current users logged into or browsing an area of your support desk.

To view the user sessions currently active within the system, click on **Active Sessions** under the **Diagnostics** menu.

A list of the current users logged into or browsing an area of your support desk is listed.

As an administrator, you can kill a session by checking the corresponding session box and clicking **Kill Sessions** icon. If you kill a user who is active in a session (logged into the admin control panel/staff control panel), the user is logged out and has to log in again.

A success message is displayed after killing the selected sessions.

**Note:**

GFI HelpDesk does not log the login activities of the customers so you can only check the currently active client sessions. For staff/admin users, you can click on Login Log under the Logs menu.

Though if you need to collect user activities logging, as an alternative, you can check in Active Sessions the logs with `'Session type' = 'Client'`.

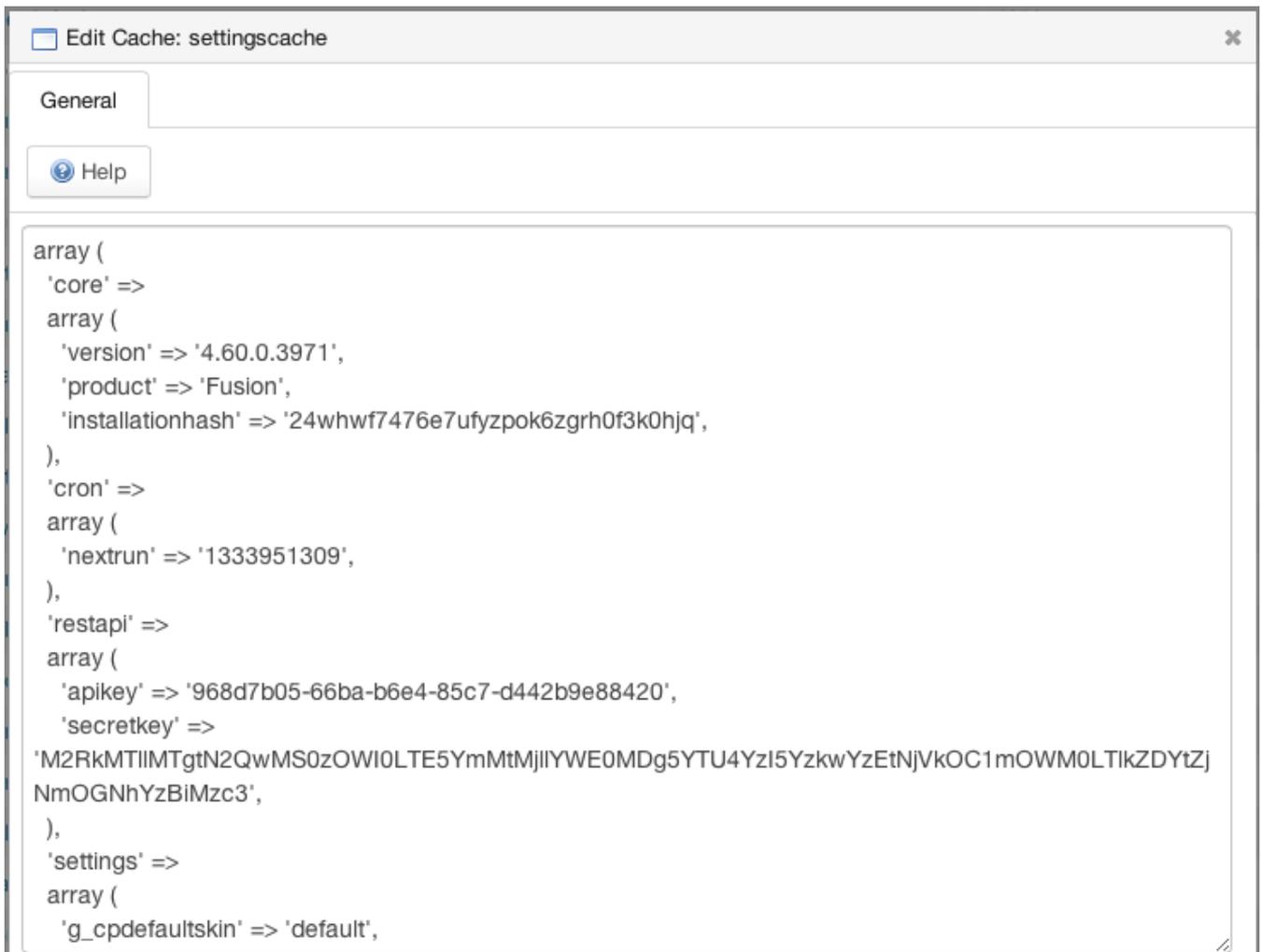
### Cache Info

Most templates are cached in the database to save time instead of generating them every time a page is requested.

To view the system's cache, go to **OPTIONS > Diagnostics > Cache Info**.

A list of all the cached templates and the size of each cache are listed.

The contents of a cached item can be viewed by clicking on the corresponding cache title. Clicking the settings cache displays the following cache contents:



```
array (
  'core' =>
  array (
    'version' => '4.60.0.3971',
    'product' => 'Fusion',
    'installationhash' => '24whwf7476e7ufyzpok6zgrh0f3k0hjq',
  ),
  'cron' =>
  array (
    'nextron' => '1333951309',
  ),
  'restapi' =>
  array (
    'apikey' => '968d7b05-66ba-b6e4-85c7-d442b9e88420',
    'secretkey' =>
    'M2RkMTIIMTgtN2QwMS0zOWI0LTE5YmMtMjllYWE0MDg5YTU4YzI5YzkwYzEtNjVhOC1mOWM0LTlkZDYtZjNmOGNhYzBiMzc3',
  ),
  'settings' =>
  array (
    'g_cpdefaultskin' => 'default',
```

Screenshot 137: Cache content

## Rebuild Cache

The rebuild cache option is provided to recreate the cached contents in the `__swift/cache/` directory, as well as all the cached data like settings, staff groups, language phrase, etc. stored in the database.

To view and rebuild the support desk cache, go to **OPTIONS > Diagnostics > Rebuild Cache**.

Clicking on the **Rebuild cache** option clears the support desk cache, and you get a success messages under the result column.

At times, the admin control panel may freeze due to excessive or outdated data stored in the cache. In this case, you need to delete all the files from the `__swift/cache/` directory and rebuild your cache.

## PHP Info

[PHPInfo](#) is a function that returns information in HTML form about the PHP environment on your server. PHP's `phpinfo()` executes when viewing the PHP info.

To view the system's PHP info, go to **OPTIONS > Diagnostics > PHP Info**.

It displays a page which contains all the information related to the PHP environment set on the server containing the support desk.

PHPinfo is one of the essential troubleshooting functions concerning PHP. The main objective of the `phpinfo()` function is to diagnose PHP problems that are possibly related to its configuration.

## Report Issue

This section is provided to report a bug in the software.

Submitting a bug under the report bug section sends all the relevant information about the server, along with your comments, to the GFI HelpDesk support staff so that support can diagnose the information and confirm the bug.

To access and report a bug, go to **OPTIONS > Diagnostics > Report Issue**.

It displays the page where you can fill in the bug-related information.

After filling in the required information related to the bug, click Send to dispatch the email.

## License Info

This section provides vital information about your product license.

To view your GFI HelpDesk Fusion, Case or Engage license information, click on License Info under the Diagnostics menu.

Your product's license information is displayed.

This section shows the following information about your product licensing:

<b>Expiration Date</b>	The exact date when the license for this product expires
<b>Registered Name</b>	The email address used to register the product with GFI HelpDesk
<b>Organization</b>	The organization name associated with this product license
<b>Number of staff users allowed</b>	The number of seats for which this license is valid
<b>Unique ID</b>	The unique identifier associated with your product license
<b>Product</b>	The product tier you have purchased, that is, GFI HelpDesk Fusion, Engage, or Case.
<b>Licensed Domains</b>	This is a list of your registered domain(s)/sub-domain(s)/IP(s). The domains/sub-domains/IPs mentioned here are valid for the product installation.

### 4.6.3 Changing the product base URL in GFI HelpDesk

As a GFI HelpDesk customer, you have the option to change your GFI HelpDesk base URL.

For example - you can change from `brewfictus.gfihelpdesk.com` to `support.brewfictus.com`.

This topic provides instructions on how to change the GFI HelpDesk base URL.

Keep in mind that your GFI HelpDesk OnDemand instance is protected by a "wildcard" SSL certificate. This certificate covers our domain (`www.gfi.com`) and any sub-domains we have (`www.[yourdomain].gfi.com`).

However, you need to purchase an SSL certificate for your GFI HelpDesk Download domain and any custom domains including OnDemand custom domain or URL.

To learn more, read [Adding or Updating SSL Certificates For Your Domain](#).

#### GFI HelpDesk

If you need to update the product URL of your GFI HelpDesk (on-premise installation), there are two ways to do it.

#### NOTE:

The code assumes GFI HelpDesk is installed at a location `/var/www/swift` and `MY-NEW-DOMAIN` is the new URL.

## A. Using an SQL query

1. Get database details from config.php.

```
head -n50 /var/www/swift/___swift/config/config.php
```

2. Check the product URL in database.

```
select data from swsettings where vkey='general_producturl';
```

3. Update product URL in database.

```
update swsettings set data = 'https://MY-NEW-DOMAIN/' where vkey = 'general_producturl';
```

4. Rebuild Cache of Help desk by following the instructions here, [Rebuilding Helpdesk Cache Manually](#).

### Note:

Cache files are written every time someone access a GFI HelpDesk installation.

When you delete the cache through the steps above, some files may be left behind, which may cause issues in the UI.

If you start to experience issues after performing this procedure, it may be helpful to go directly to the \_\_\_swift/cache directory and delete everything there.

## B. From the Console

Execute the following commands from the command line (be careful with the %2F strings surrounding MY-NEW-DOMAIN):

```
1. cd /var/www/swift
```

```
2. php console/index.php /Base/LegacyInstance/ChangeProductURL  
"http%3A%2F%2FMY-NEW-DOMAIN%2F"
```

### 4.6.4 Adding or updating SSL certificates for your domain

This section provides information about SSL certificates and the steps in adding or updating an SSL certificate for your domain.

To ensure that website visitors' information is always safe, an SSL certificate needs to be installed for the domain.

Secure Sockets Layer (SSL) technology protects the online transactions and helps increase trust in your Web site in the following three essential ways:

- » An SSL Certificate enables encryption of sensitive information during online transactions.
- » Each SSL Certificate is a unique credential identifying the certificate owner.
- » A Certificate Authority authenticates the identity of the certificate owner before it is issued.

Web servers and Web browsers rely on the Secure Sockets Layer (SSL) protocol to create a uniquely encrypted channel for private communications over the public Internet. Each SSL Certificate consists of a public key and a private key.

The public key is used to encrypt information and the private key is used to decrypt it. When a Web browser points to a secured domain, a level of encryption is established based on the type of SSL Certificate.

That said, we know you have spent valuable time and resources building up your brand, and we also know that a large part of that is your online presence — including your website domain. That is why we have added the capability for OnDemand customers to use SSL certificates for their support domains.

---

---

## Adding or updating your SSL for your GFI HelpDesk instance

If you are using GFI HelpDesk, once your DNS changes have taken effect and our team has added your SSL certificate, you have to update the base URL for your support site:

### Note:

To install your certificate, you can follow the general guidelines or request help from your certificate issuer to get installed in Apache Server.

1. Log into your Admin CP and keep the tab open to keep the session active.
2. Go to your MySQL database.
3. Run the following query (replace the URL accordingly):

```
UPDATE swsettings
SET data = 'https://[newURL].com' WHERE vkey = 'general_producturl'
```

4. Rebuild your GFI HelpDesk cache by opening the following link in a browser (replace the URL accordingly):

```
https://[newURL].com/admin/index.php?/Base/Diagnostics/RebuildCache
```

5. Open to your new base URL. The portal should be functioning correctly with the updated URL.

## 4.6.5 Rebuilding helpdesk cache manually

Follow the instructions below to rebuild the help desk cache manually:

1. Copy the URL `http://yourdomain.com/helpdesk-installation-directory/staff/index.php?/Core/Default/RebuildCache` to a browser.
2. Replace `yourdomain.com` with your actual domain name.
3. Replace `helpdesk-installation-directory` with the actual help desk installation directory on your servers.
4. Press **Enter**.

## 4.6.6 Removing-Ticket-URL-from-the-Auto-Response-Emails

The auto-response emails have a link to the ticket in the following format:

```
You can check the status of or reply to this ticket online at:
http://<SupportDomain>/index.php?/Tickets/Ticket/View/PAE-785-70892
```

The topic details the process to remove the ticket URL from the auto-response emails.

in order to remove the link from the autoresponder email, follow the steps below:

1. Login to Admin control panel and go to **Templates > Groups > Click on the group name > Templates > Tickets**.
2. Access `email_ticketautoresponderhtml`.
3. Remove the following lines of code:

```
<{$_language[arsubfooter]}>
<a href="{$_basePath}>
<{$_templateGroupPrefix}>/Tickets/Ticket/View/<{$_ticket
[displayticketid]}>" target="_blank">
<{$_basePath}>
<{$_templateGroupPrefix}>/Tickets/Ticket/View/<{$_ticket
[displayticketid]}>
</a>
<br/>
```

Removing above mentioned line of code from the email template removes links from all the auto-response emails processed post modifications.

#### 4.6.7 Hiding the Ticket Owner on the Helpdesk Portal

The image below shows the user name hidden behind the black box. This topic guides you through the process of hiding the owner of the ticket that is shown in the customer support portal.

View Ticket: [Redacted]

**Test job logged**  
 Created: 02 March 2018 10:47 AM Updated: 02 March 2018 10:47 AM

Ticket Organization: [Redacted]  
 Overall Satisfaction [5 stars]

DEPARTMENT	OWNER	TYPE	STATUS	PRIORITY
Cannot Open Link...	[Redacted]	Support	Closed - Manual	Information Requ...

**Additional Information**

Facility/Location Name:\*

Contact Phone Number:

[Add Reply](#)

[Redacted] User  
 Posted on: 02 March 2018 10:47 AM NEW  
 This is a test

Screenshot 138: Test job logged

There is no direct setting for it, but you can edit the template by following the steps given below:

1. Login to Admin Control Panel and go to **Templates > Templates**.
2. In the **Tickets** section, find the **viewticket** template.
3. Find the following code in the template's contents:

```
<div class="ticketgeneralpropertiesobject"><div class-  
s="ticketgeneralpropertiestitle"><{_language[vtowner]}></div><div  
class="ticketgeneralpropertiescontent"><{_ticketContainer[own-  
er]}></div></div>
```

4. Replace it with the below code:

```
<div class="ticketgeneralpropertiesobject"><div class-  
s="ticketgeneralpropertiestitle"><{_language[vtowner]}></div><div  
class="ticketgeneralpropertiescontent">(private)</div></div>
```

### 4.6.8 Creating knowledge bases for multiple brands

Support queries can be solved before they even reach you with a well-structured self-service portal.

The most effective self-service portals are those that deliver a seamless customer experience, and a lot of that comes down to consistent branding between your product and your support.

With GFI HelpDesk, you can create multiple knowledge bases, each branded for a specific product line or a subset of customers.

Here you can know how GFI HelpDesk handles multi-brand knowledge bases and then walk you through the steps to creating your own.

---

#### Understanding how GFI HelpDesk handles multi-brand knowledge bases

GFI HelpDesk is designed to support multiple brand-specific front-ends all from one common back-end management interface.

To make sure that your branded content appears in the right place, to the right audience, with the right formatting, there are several elements that need to be in place:

- » creating new user groups for each brand you want to use. GFI HelpDesk uses these to control the visibility of the different categories and articles.
- » assigning user accounts to different user groups.
- » control the look of the branded support sites, you'll define a template group for each brand, and link those templates to the corresponding user groups.
- » building categories for each brand and link them to a particular user group so that any articles in those categories only appear on that brand's knowledge base.
- » updating your support site links in order to route traffic to the knowledge base for a brand.

Once each of those elements is in place, your team can write and publish self-service articles and easily restrict them to a particular branded knowledge base. Read on for detailed instructions for how to set up a multi-brand knowledge to support three example brands.

## Building a multi-brand knowledge base

To create a multi-brand knowledge base, do the following:

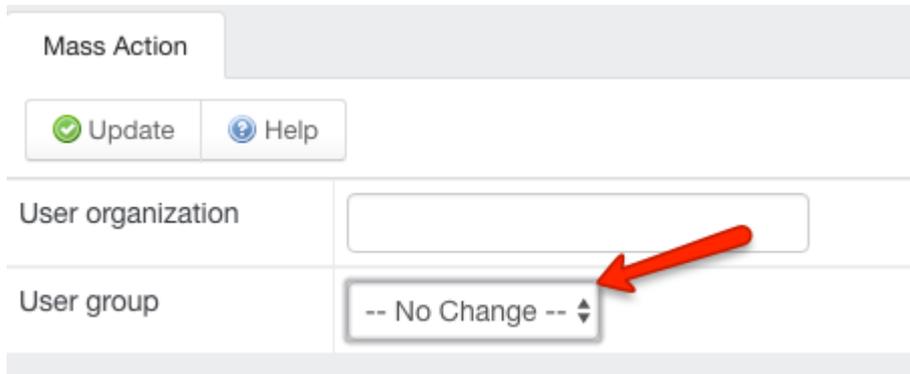
1. Log into the admin control panel.
2. Click the Users link on the top toolbar, and then the **Insert User Group** link that appears below.
3. Now, we are going set up a 'Guest' user group and a 'Registered' user group for each of three brands. So we'll need six user groups, all together:
  - » 'Guest - Brand A'
  - » 'Registered - Brand A'
  - » 'Guest - Brand B'
  - » 'Registered - Brand B'
  - » 'Guest - Brand C'
  - » 'Registered - Brand C'
4. In the **Group Name** field, enter the name for the first group, 'Guest - Brand A'.
5. In the Group Type field, select **Guest**.
6. Click **Insert** to save your new group.
7. You end up back on the **Manage User Groups** page. Click the **Insert User Group** link to create your next group.
8. This time, the **Group Name** should be 'Registered - Brand A'.
9. For Group Type, select 'Registered'.
10. Click the Insert button to save.
11. Repeat the steps above to create the remaining four user groups—a 'Guest' and 'Registered' group each for Brands 'B' and 'C'.

### NOTE:

For the 'Guest' user groups, GFI HelpDesk determines which template to use for guest traffic, based on the URL they use to get to your help desk. More on that below.

12. Next, we need to populate each user group with the user accounts that belong to them.
  13. Click the Staff CP link in the upper right to switch to the staff control panel.
  14. Click the Users link on the toolbar.
  15. On the **Manage Users** page, find the customer accounts for 'Brand A' and check the box to the left.
  16. At the bottom of the screen, under the **Mass Action** heading, select 'Registered - Brand A' from the **User Group** dropdown.
  17. Repeat the last two steps to add any customer accounts for 'Brand B' and 'Brand C' to the appropriate 'Registered' user group.
  18. Next, comes the templates, which control how the content in each brand appears on the support site. Because template customization is one of GFI HelpDesk's most powerful features, refer customizing the templates involved in branding a support center. Follow the steps from it to create three new Template Groups:
- Next, we need to populate each user group with the user accounts that belong to them.

1. Click the Staff CP link in the upper right to switch to the staff control panel.
2. Click the Users link on the toolbar.
3. On the **Manage Users** page, find the customer accounts for 'Brand A' and check the box to the left.
4. At the bottom of the screen, under the **Mass Action** heading, select 'Registered - Brand A' from the **User Group** dropdown.



The screenshot shows a 'Mass Action' section with two buttons: 'Update' (with a green checkmark icon) and 'Help' (with a blue question mark icon). Below these is a table with two rows. The first row is labeled 'User organization' and has an empty text input field. The second row is labeled 'User group' and has a dropdown menu currently displaying '-- No Change --'. A red arrow points to the dropdown menu.

Screenshot 139: Select from User Group dropdown

5. Repeat the last two steps to add any customer accounts for 'Brand B' and 'Brand C' to the appropriate 'Registered' user group.

Next, comes the templates, which control how the content in each brand appears on the support site. Because template customization is one of GFI HelpDesk's most powerful features, refer [customizing the templates](#) involved in branding a support center.

Follow the steps from it to create three new Template Groups:

- » 'Brand\_A'
- » 'Brand\_B'
- » 'Brand\_C'

Make your modifications to the templates in each group, again, following the steps outlined in [customizing the templates](#).

Now, we are going to link each template group to its corresponding user groups.

1. From the admin control panel, on the **Template Groups** landing page, click the title of the 'Brand\_A' template group to edit it.

Edit Template Group: Brand\_A

General

Permissions

Settings

Settings: Tickets

Settings: Live Chat

Templates

Delete

Restore

Help

---

### General Options

---

**Default language** English (U.S.) ▾  
 The language which the helpdesk will select by default for this template group.

---

### User Group Roles

---

**Guest (not logged in) user group** Guest ▾  
 This user group will determine the permissions and settings for anyone visiting the support center and **is not logged in**.

---

**Registered (logged in) user group** Registered ▾  
 This user group will determine the permissions and settings for anyone visiting the support center and **is logged in**.

---

**Restrict to registered user group**  Yes  No  
 Only users belonging to the user group specified above will be able to log into the support center under this template group.

Screenshot 140: Edit template group

2. From the **Guest (not logged in) User Group** dropdown, select the 'Guest - Brand A' user group.
3. From the **Registered (logged in) User Group** dropdown, select the 'Registered - Brand A' user group.
4. Repeat the last two steps for the 'Brand B' and 'Brand C' template groups.
5. Finally, we are going to set up knowledge base categories to contain articles for each brand.
6. Switch back to the staff control panel and click **Knowledgebase** on the toolbar.
7. Next, click the **Categories** link and the **Insert Category** button to create a new knowledge base category.
8. In the **Category Title** field, type 'Brand A'.
9. Click the **Permissions: Users** tab at the top of the window.
10. On this screen, we can control which user groups can view content in this category. In the **Restrict to specific user groups** select 'Yes'.
11. Under **User Groups** leave the rows for 'Brand A - Registered' and 'Brand A - Guest' on 'Yes', and set every other row to 'Now'. This displays articles in this category only to Brand A visitors.

Insert

General Options **Permissions: Users** Permissions: Staff

Help

Restrict to specific user groups  Yes  No  
 If enabled, only the user groups below will be able to see this category.

User Groups

Espanol	<input type="radio"/> Yes <input checked="" type="radio"/> No
Guest	<input type="radio"/> Yes <input checked="" type="radio"/> No
Guest - Brand A	<input checked="" type="radio"/> Yes <input type="radio"/> No
Registered	<input type="radio"/> Yes <input checked="" type="radio"/> No
Registered - Brand A	<input checked="" type="radio"/> Yes <input type="radio"/> No

Screenshot 141: Set rows under User groups as Yes for Brand A

**NOTE:**

You could choose to restrict the category to only the registered group, to limit articles' visibility to logged in users.

12. Click **Save** to create your new category.

13. Repeat the steps above to create new categories for 'Brand B' and 'Brand C'.

Now, when you create articles, you can save them in the category for the appropriate brand.

The final step is to actually direct your customers to your branded support sites. Append the template group name to the end of your support site's URL:

- » [http://\[yourgfidomain\].com/index.php?/Brand\\_A](http://[yourgfidomain].com/index.php?/Brand_A)
- » [http://\[yourgfidomain\].com/index.php?/Brand\\_B](http://[yourgfidomain].com/index.php?/Brand_B)
- » [http://\[yourgfidomain\].com/index.php?/Brand\\_C](http://[yourgfidomain].com/index.php?/Brand_C)

Any visitors to those URLs views the branded support site, and whether they are logged in or not controls what content they can see.

### 4.6.9 Using template groups to create a branded support experience

Template groups in helpdesk support the concept of brands.

A set of templates dealing with front-end layout, design, and outgoing emails constitute a template group in the helpdesk.

Each template group is linked to a particular set of a user group (for which it is intended), carries its own brand name, has a linked default language and set of default ticket properties linked to it.

In essence, each group acts as a unique front-end with a customizable set of templates which can be modified to let you reflect a brand to your users and personalize the experience on the basis of the brand.

---

---

## Understanding user groups

Helpdesk allows core segregation of your user base on the basis of the user group to which a user profile is linked.

Permission set in terms of content visibility (except for ticket sharing) is done on the basis of the user group to which a user profile is linked.

User groups are of two types – ‘Registered’ and ‘Guest’. ‘Guest’ type user groups allow you to segregate content visibility for visitors, that is, users who haven’t logged in. ‘Registered’ type controls visibility for logged in user. Each template group is linked to one of each.

You can add and manage user groups in helpdesk from **Admin interface > Users**.

## How helpdesk handles registration and authentication?

Registration from support center results in user profile being linked to ‘Registered’ type user group linked to the template group which has been accessed. A ticket submitted or a chat initiated from an unknown email address results in a user profile being created in a similar manner.

A new live chat tag is generated for a template group and an email queue is linked to one. This means that no matter what the source might be, an unknown email address is registered once a request is submitted.

A user placing authentication from a template group is re-directed to another template group if user group (or the user) doesn’t match user group linked to template group, and user group of that user is linked to another template group in the helpdesk.

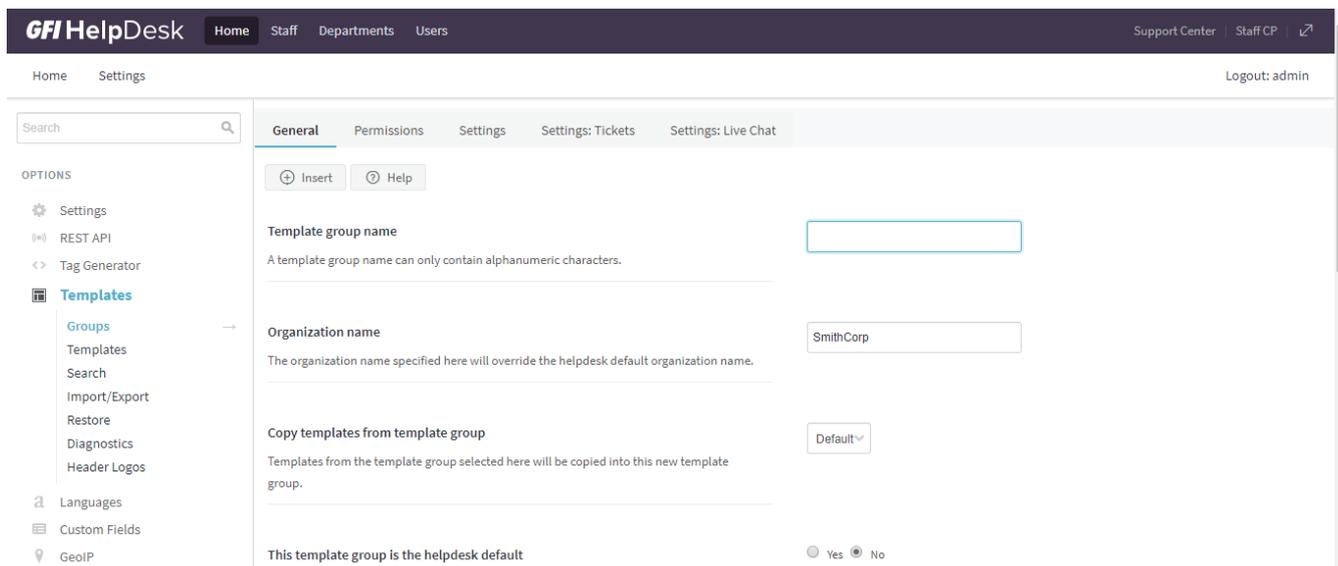
### **Note:**

Local user authentication is not attempted from a template group if login share authentication is enabled for it.

## Configuring template groups

To configure template groups login to Admin interface.

Go to **Options > Templates > Groups**.



Screenshot 142: Navigation to template groups

A template group selected as default is routed to by default when helpdesk domain is accessed from a browser. A template group can be accessed via following generic URL:

```
https://[yourdomain].com/index.php?[templategroupname]
```

Once a template group has been accessed, it is set as default for the web browser via cookies. This means that helpdesk domain URL (without an explicit template group name) redirects to it.

## Restricting content visibility

Content in helpdesk can be restricted on the basis of the user group. We help you get started:

- » **Knowledgebase categories:** Each knowledgebase article is linked to a category and any category (except for Parent category) can be restricted on the basis of user groups. This can be done via 'Permissions: Users' tab of a knowledge base category from **Staff interface > Knowledgebase > Categories**.
- » **News articles:** Each news article's visibility on Support center can be restricted individually from 'Permissions (Users)' tab when creating or editing a new article from **Staff interface > News > Insert News / Manage News**.
- » **Departments:** visibility of departments can be controlled similarly from 'Permissions: Users' tab of a department from Admin interface, **Departments > Manage department**. Similar restrictions can be placed on the basis of user group for widgets, troubleshooters, custom fields and various ticket properties.

For modifying Templates, refer to [Getting started with modifications](#)

### 4.6.10 Removing the login form from your support site

The login form is enabled by default on Support Center sites.

Every user who interacts with you in GFI HelpDesk is automatically registered, and they receive login credentials via email. Registered users can log in to their support account to keep a track of their tickets and manage their account.

This form also has a Subscribe option that allows any visitor to subscribe to your company's newsletter and get emails for mass updates published through your GFI HelpDesk.

If your organization does not require its end-users to log in or subscribe to news and you want to free up space on your Support Center site, you can remove the Login Form by modifying your site's template.

**Note:**

Removing the Login Form means clients cannot log in and access their tickets, update their profile or subscribe to news updates.

Below are the steps for removing the login form from support site:

1. Log in to the GFI HelpDesk Admin Panel.
2. Click on **Templates** on the navigation bar.
3. Click **Groups** and then select the template group for your site from the list.
4. Click on **General** to expand the category.
5. Click on header to open the header template, which contains the code responsible for rendering the Login Form.
6. Select the code below, and delete it from the header template:

```

<div id="leftloginsubscribebox">
<{if $_userIsLoggedIn == true}>
<div class="tabrow" id="leftloginsubscribeboxtabs"><a id="leftloginsubscribeboxlogintab" href="#"
class="atab"><span class="tableftgap"> </span><span class="tabbulk"><span class="tabtext" title="<{$_language
[myaccount]}>"><{$_language[myaccount]}></span></span></a></div>
<div id="leftloginbox" class="switchingpanel active">
<div class="maitem maprofile" onclick="javascript: Redirect('<{$_baseName}><{$_
templateGroupPrefix}>/Base/UserAccount/Profile');"><{$_language[maprofile]}></div>
<{if ($_settings[user_orgprofileupdate] == 'allusers' && $_user[userorganizationid] != '0') || ($_user[userrole] == 2 &&
$_settings[user_orgprofileupdate] == 'managersonly' && $_user[userorganizationid] != '0')}>
<div class="maitem maorganization" onclick="javascript: Redirect('<{$_baseName}><{$_
templateGroupPrefix}>/Base/UserAccount/MyOrganization');"><{$_language[maorganization]}></div>
</if>
<{foreach key=_itemID item=_navbarMenuItem from=$_navbarMenuItemContainer}>
<div class="maitem <{if $_navbarMenuItem[class] != ''}> <{$_navbarMenuItem[class]}></if>" onclick="javascript:
Redirect('<{$_navbarMenuItem[link]}>');"><{$_navbarMenuItem[title]}></div>
</foreach>
<div class="maitem mapreferences" onclick="javascript: Redirect('<{$_baseName}><{$_
templateGroupPrefix}>/Base/UserAccount/Preferences');"><{$_language[mapreferences]}></div>
<div class="maitem machangepassword" onclick="javascript: Redirect('<{$_baseName}><{$_
templateGroupPrefix}>/Base/UserAccount/ChangePassword');"><{$_language[machangepassword]}></div>
<div class="maitem malogout" onclick="javascript: Redirect('<{$_baseName}><{$_
templateGroupPrefix}>/Base/User/Logout');"><{$_language[malogout]}></div>
</div>
<{else}>
<form method="post" action="<{$_baseName}><{$_templateGroupPrefix}>/Base/User/Login"
name="LoginForm">
<div class="tabrow" id="leftloginsubscribeboxtabs"><a id="leftloginsubscribeboxlogintab" href="javascript:void(0);"
onclick="ActivateLoginTab();" class="atab"><span class="tableftgap"> </span><span class="tabbulk"><span
class="tabtext" title="<{$_language[login]}>"><{$_language[login]}></span></span></a><{if $_
canSubscribeNews == true}><a id="leftloginsubscribeboxsubscribetab" href="javascript: void(0);"
onclick="javascript: ActivateSubscribeTab();" class="atab inactive"><span class="tableftgap"> </span><span
class="tabbulk"><span class="tabtext" title="<{$_language[subscribe]}>"><{$_language
[subscribe]}></span></span></a></if></div>
<div id="leftloginbox" class="switchingpanel active">
<input type="hidden" name="_redirectAction" value="<{$_redirectAction}" />
<input type="hidden" name="_csrfhash" value="<{$_csrfhash}" />
<div class="inputframe zebraeven"><input class="loginstyled<{if $_userLoginEmail != ''}><{else}>label</if>"
value="<{if $_userLoginEmail != ''}><{$_userLoginEmail}><{else}><{$_language[loginenteremail]}></if>"
onfocus="javascript: ResetLabel(this, '<{$_language[loginenteremail]}>', 'loginstyled');" name="scemail"
type="text"></div>
<div class="inputframe zebraodd"><input class="loginstyled" value="<{$_userLoginPassword}"
name="scpassword" type="password" autocomplete="off"></div>
<div class="inputframe zebraeven"><input id="leftloginboxrememberme" name="rememberme" value="1"
type="checkbox"><{if $_userRememberMe == true}> checked</if>><label

```

```

for="leftloginboxrememberme"><span id="leftloginboxremembermetext"><{{$_language
[rememberme]}}></span></label></div>
<hr class="vdivider">
<div id="logintext"><a href="{$_baseName}>{{$_templateGroupPrefix}}/Base/UserLostPassword/Index" title="{
{{$_language[lostpassword]}}">{{$_language[lostpassword]}}></a></div>
<div id="loginsubscribebuttons"><input class="rebutton" value="{$_language[login]}}>" type="submit" title="{
{{$_language[login]}}>" /></div>
</div>
</form>
<{{if $_canSubscribeNews == true}}>
<form method="post" action="{$_baseName}>{{$_templateGroupPrefix}}/News/Subscriber/Subscribe"
name="SubscribeForm">
<input type="hidden" name="_csrfhash" value="{$_csrfhash}}>" />
<div id="leftsubscribebox" class="switchingpanel">
<div class="inputframe zebraeven"><input class="emailstyledlabel" value="{$_language[loginenteremail]}}>"
onfocus="javascript: ResetLabel(this, '{$_language[loginenteremail]}}', 'emailstyled');" name="subscribeemail"
type="text"></div>
<hr class="vdivider">
<div id="logintext"> </div>
<div id="loginsubscribebuttons"><input class="rebutton" value="{$_language[buttonsubmit]}}>"
type="submit"></div>
</div>
</form>
<{{/if}}>
<{{/if}}>

```

7. Click **Save & Reload** on top to save your changes.

8. Clear the cache by clicking Diagnostics on the left navigation bar, and then click Rebuild Cache underneath it. Refer to [Accessing GFI Helpdesk Diagnostic Tools](#) for more information.

Go back to your Support Center site and reload the page by pressing Ctrl + F5. The Login Form is no longer shown.

#### 4.6.11 Adding quicklinks to your support site with widgets

Widgets refer to the Hyperlinks buttons that reside on the main client support interface which redirect users to a specific section such as:

- » Ticket submission form
- » User registration section
- » Knowledgebase

The following widgets are available in the helpdesk by default and can be accessed by selecting **Widgets** on the admin control panel.

Widget	Description
Register	Users can register their account via this widget.
Submit a Ticket	Users can submit tickets for reporting their issues from the Client Support Center.

Widget	Description
Knowledgebase	The knowledgebase is a database of categorized articles that act as an information repository (much like a frequently asked question database) for the clients.
News	A collection of latest updates about an organization, new products launched or new features added in the existing product are visible to the clients in the News section.
Troubleshooter	Troubleshooter wizard guides the clients through a series of sequential instructions which enable self-diagnosis and resolution of the issue they are facing. The clients are offered step-by-step problem solving using a story-board of questions and answers helping the user resolve their issue.
View Tickets	This widget is only visible to a logged-in user to check their current tickets statuses.

### Renaming the Widgets Title

The widget's title can be renamed by following the below steps:

1. Log in to the Admin Control Panel.
2. Click **Widgets**.
3. Select the Widget and click the **Widget label** to edit.

## 4.6.12 Integrating GFI HelpDesk with Identity Providers

An identity provider (IdP) is a system entity that creates, maintains, and manages identity information and offers user authentication as a service. There are two types of identity providers: Security Assertion Markup Language (SAML) and Open Connect OD (OpenID). GFI HelpDesk supports SAML.

This topic provides information on how you can integrate GFI HelpDesk with identity providers.

**Security Assertion Markup Language (SAML)** is an XML-based open-standard data format for exchanging authentication and authorization data between parties, in particular, between an identity provider and a service provider.

The SAML specification defines three roles:

- » the principal (typically a user)
- » the identity provider (IdP)
- » the service provider (SP)

In the use case addressed by SAML, the principal requests a service from the service provider. The service provider requests and obtains an identity assertion from the identity provider. On the basis of this assertion, the service provider can make an access control decision - in other words, it can decide whether to perform some service for the connected principal.

There is a GFI HelpDesk module for SAML's Single Sign-On integration for GFI HelpDesk version 4.50 and higher. Using single sign-on (SSO) module permits a single action of user authentication and authorization to access all computers and systems where he has access permission, without the need to enter multiple passwords.

To download the GFI HelpDesk module for SAML Single Sign-On integration, please visit GFI HelpDesk Forge.

Features

- » Users can log in with Facebook credentials.
- » Users can log in with Twitter credentials.
- » Can easily integrate with your IdP so that users in your organization can log in with there IdP credentials

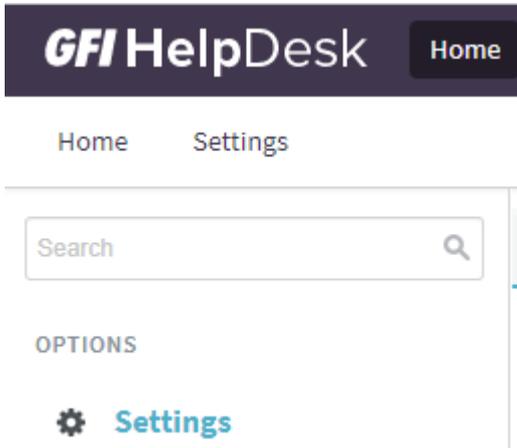
### 4.6.13 Setting up automatic approval of support center comments

The comments posted by users on knowledge base articles at the Support Center appear in the Staff Control Panel. These comments can be approved, deleted, or marked as spam manually.

However, you may also configure the settings so that the comments are automatically approved.

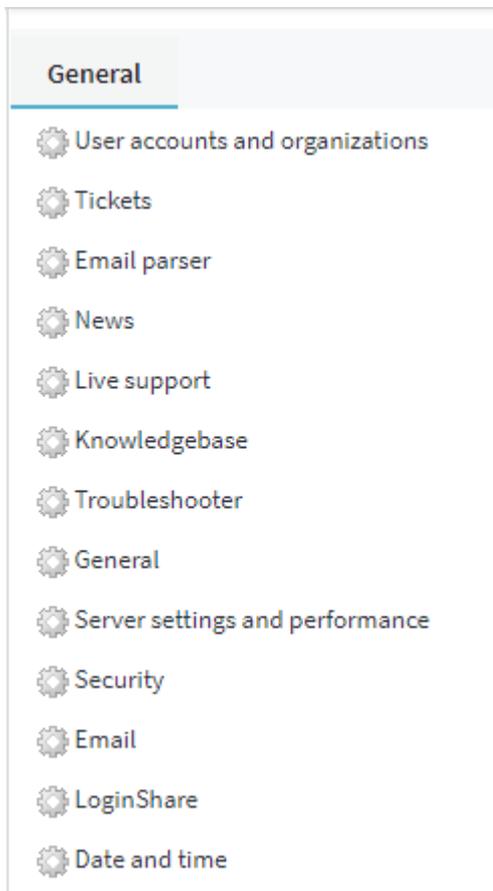
To set up automatic approval of user comments, follow the below steps:

1. Log in to your GFI HelpDesk instance and go to the Admin control panel.
2. Click **Home**, and then select **Settings**.



Screenshot 143: Settings

3. Click **Security** and scroll down to the **Comments Settings** section.



Screenshot 144: Click security and go to comments settings section

4. Select **Yes** on **Automatically approve comments**.

#### COMMENTS SETTINGS

##### Automatically approve comments

  Yes  No

The helpdesk will automatically approve comments and they will be immediately visible in the support center. If disabled, they will not be visible until approved by staff.

##### Enable Akismet spam checking for comments

Yes  No

Akismet is an anti-spam service for comments. For more information, visit [akismet.com](https://akismet.com). To use Akismet you will need to register for a free account and API key.

*Screenshot 145: Select Yes on Automatically approve comments*

#### NOTE:

You may also enable [Akismet spam checking for comments](#) in this section.

5. Click **Update** to save the changes.

## 4.6.14 Preventing spam for helpcenter comments using CAPTCHA and Akismet

If you are getting a high number of spam comments that are showing up in your staff's comments section despite disabling public comments on your public facing knowledge-base articles, you can prevent this by using the tools described in this topic.

There are two ways of preventing spam from coming from the comments section of the articles.

### Require CAPTCHA for comments

Users are asked to complete a CAPTCHA while posting a comment to verify that they are human. With CAPTCHA in place, a spambot or script cannot send in new comments without validating the captcha field.

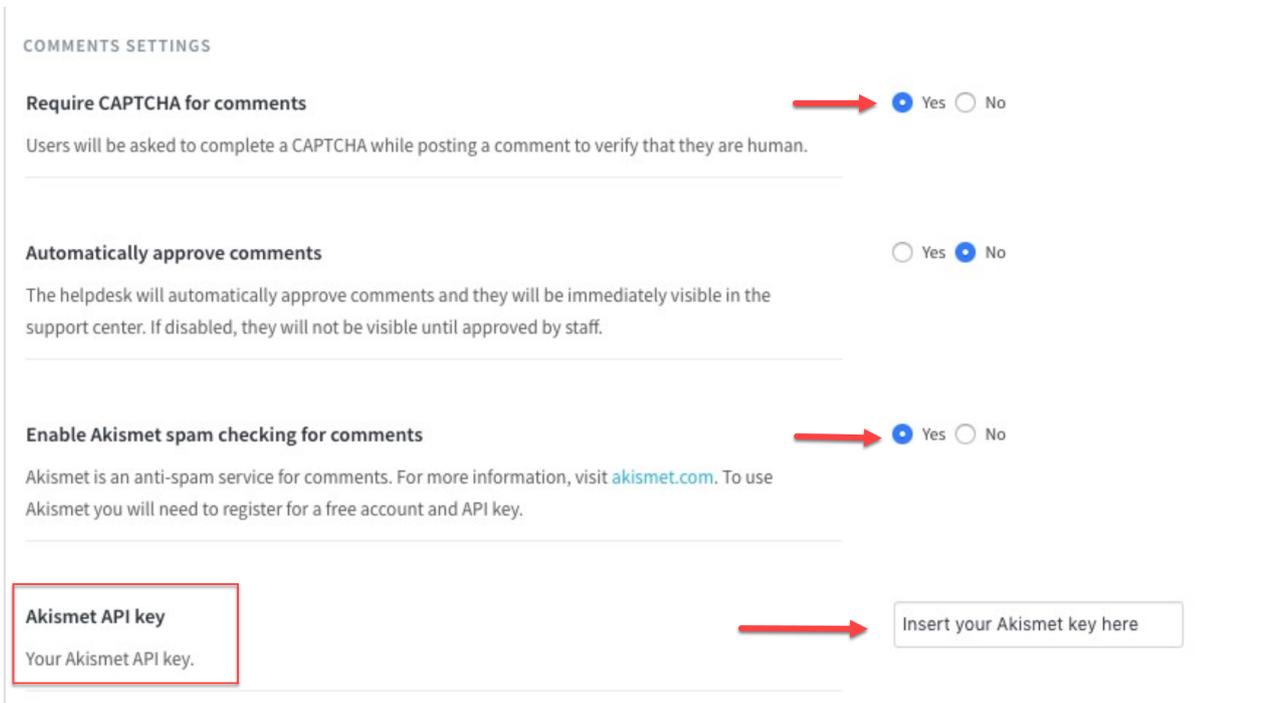
1. To enable the CAPTCHA for comments, navigate to Admin Control Panel and go to **Settings > Security**.
2. Under **Comments Settings**, enable the option: **Require CAPTCHA for comments**.
3. Click **Update** on the top of the page

### Enable Akismet spam checking for comments

[Akismet](#) is an anti-spam service for comments. To use Akismet, register for a free account and API key, and then follow the steps listed below:

1. To enable Akismet spam checking for comments, login to Admin Control Panel and go to **Settings > Security**.
2. Enable **Akismet spam checking for comments**.
3. Enter your Akismet API key.
4. Click **Update** on the top of the page

Your final settings should look as in the image shown below



Screenshot 146: Your final settings should look like this

#### 4.6.15 Enabling LoginShare for user accounts

LoginShare is the mechanism for authenticating your support desk users using an external database or authentication mechanism.

With LoginShare, you can integrate your GFI HelpDesk product with your existing Intranet, LDAP (Active Directory), or any third party applications. Single sign-on enables centralized management of user accounts from one single source.

If you already have backend systems and user databases available, this enables you to let your users log in, without registering another account.

##### Enabling LoginShare

To configure LoginShare settings in the support desk, click on the Users tab on the navigation menu bar, and then click LoginShare.

You are presented with all the configurable settings specific to the LoginShare configuration.

<b>Enable external authentication for users</b>	If set to Yes, all authentication requests for the support center users are first tried against the URL specified below in the "User LoginShare URL" field, that is the LoginShare API.
<b>User LoginShare API name</b>	Specify a title/name that you wish to keep for this LoginShare for identification.
<b>User LoginShare API URL</b>	Specify the LoginShare API URL here. This is a URL to the location of an authentication script.

It is important that your LoginShare script is properly tested or you could lock yourself out of the system.

Once enabled, the system dispatches any login requests made by your clients to the authentication URL.

##### LoginShare protocol

The LoginShare script needs to be designed to receive the following data via POST.

- » **username:** The username entered by the user
- » **password:** The password specified by the user
- » **ipaddress:** The IP address of user attempting to log in

The LoginShare script needs to reply with an XML format that corresponds to one of the following formats:

Add interface related checks to your script, or you could end up allowing access to the Admin CP.

Authentication Failed

```
d<?xml version="1.0"encoding="UTF-8"?>
<loginshare>
<result>0</result>
<message>Invalid Username orPassword</message>
</loginshare>
```

Authentication Successful

```
<?xml version="1.0"encoding="UTF-8"?>
<loginshare>
<result>1</result>
<user>
<usergroup>Registered</usergroup>
<fullname>John Doe</fullname>
<designation>CEO</designation>
<organization>GFI, Inc.</organization> <!-- Optional: If you wish to specify the organization
for user, this is only applicable fornewusers -->
<organizationtype>restricted</organizationtype> <!-- Optional: Can be
"shared"or"restricted"(default) -->
<emails>
<email>john.doe@gfihelpdesk.com</email>
<email>john.doe@gmail.com</email>
</emails>
<phone>123-456-789</phone>
</user>
</loginshare>
```

All user accounts created by the LoginShare system have a random password assigned to them. The fields 'phone' and 'designation' are both optional.

#### **How Is a user account Identified/Linked?**

Each user account is identified based on the email address of that account. The system expects each email address to be unique; otherwise, it simply ends up updating the staff record every time a new user attempts to log in.

#### **How are authentication failures handled?**

The user's login attempt is rejected.

## 4.6.16 Enabling additional language packs

This topic provides information on enabling additional language packs.

GFI HelpDesk supports nine different languages including English. You can enable these languages like the one below:

- » Enable the language from Admin control panel by navigating from **OPTIONS** panel to **Languages > languages** and clicking.
- » If you want to translate any language yourself, you can export standard English language by going to Admin Control Panel(**Languages > Import/Export**) and translate it accordingly before importing it back into GFI HelpDesk.
- » To download any additional languages, please log in to your GFI HelpDesk account. Find the language of your choice and press the **Download** button.

### Troubleshooting

If you were to have an error similar to the one below after enabling language packs:

```
Undefined index: last modifiedby (/__swift/cache/53ad2668017573721b216d7d5c0f2207.php:44)
```

It means that the specific phrase `lastmodifiedby` does not exist for a language pack you have applied.

To fix this, do the following:

1. Login to Admin Control Panel and go to **Languages > Phrases**.
2. Select the implemented language pack from the drop down.
3. Insert Phrase and enter the information like shown below.

Home Settings Logout: testuser

Search

OPTIONS

- Settings
- REST API
- Tag Generator
- Templates
- Languages**
  - Languages
  - Phrases**
  - Search
  - Import/Export
  - Restore
  - Diagnostics
- Custom Fields
- GeolP
- Live Support
- Email Parser
- Tickets
- User Consents
- Workflow
- Ratings
- SLA
- Escalations
- Bayesian
- Knowledgebase

General

Insert Back Help

**Language**

Which language will this phrase belong to?

**Section**

Which section will this phrase belong to? It is recommended that this be kept to the global "default" section unless you want to target a specific area.

**Identifier**

Please enter a unique identifier for the new phrase. For example: ticket\_myphrase.

**Text**

Enter the contents of the phrase. HTML is accepted here.

Make sure the language is selected.

Enter "lastmodifiedby" identifier here.

Enter "Last Modified By" in the language here.

Screenshot 147: Troubleshoot additional language pack

## FAQs

1. What is language-en-gb.xml file used for?

This is a language file for English (U.K.). You can import it in your GFI HelpDesk from Admin CP > Languages > Import/Export.

2. What is geoplite.tar.gz file used for?

This is GeoIP database which is used for visitor information in GFI HelpDesk Desktop application.

To Configure GeoIP, please follow the below-mentioned steps:

- a. Extract the archive and you get the folder "geoplite.tar.gz".
- b. Copy all the contents of the folder "geoplite.tar.gz" to the product file ". / \_\_swift/geoip".
- c. Access admin control panel, go to GeoIP, and update the GeoIP database .

Please note, after copying Geo lite files in your geoip folder, do remember to configure the GeoIP by going to Admin CP > GeoIP. Here you need to click "UPDATE" respectively in all following four menu tabs:

- a. City ( Locations )
- b. City ( Blocks )
- c. ISP
- d. Organization

It takes some time to index the geo lite files in the database when you click on update.

### 4.6.17 Setting up SEO-friendly URLs

This topic describes the process to set up SEO-friendly URLs.

By default, URLs to locations in your Support Center look like this:

```
https://my.domainname.com/index.php?/Knowledgebase/List
```

This URL includes `index.php?`, which is necessary for the helpdesk to know where to send the request but is not very attractive to your end-users and it is generally better to have 'clean URLs' listed in search engines.

It is possible to achieve this using functionality called rewrite rules, which are provided by and configured on your web server (rather than GFI HelpDesk).

To set up SEO-friendly URLs, do the following:

1. Edit your helpdesk `__swift/config/config.php` file
  - a. Locate the following code in your helpdesk config file, located in `./__swift/config/config.php`:

```
define('SWIFT_BASENAME', 'index.php?');
```

- b. Remove 'index.php?' as value for 'SWIFT\_BASENAME', and save the changes

```
define('SWIFT_BASENAME', "");
```

2. Configure a rewrite rule in your web server

#### If you use Apache:

- a. If not already present, create a file called `.htaccess` in the document root of your helpdesk.
- b. Paste the following into your `.htaccess` file:

```
<IfModule mod_rewrite.c>
RewriteEngine On

RewriteCond $1!^(admin|api|console|
favicon\.ico|robots\.txt|sitemap\.xml|
index\.php|tiny_mce_gzip\.php|cron|onsite|staff|
rss|setup|visitor|winapp|wallboard|__swift)
[NC]
RewriteCond $1
!\.(jpg|jpeg|png|gif|js|css|htm|html)$ [NC]
RewriteCond %{REQUEST_FILENAME} !-f
RewriteCond %{REQUEST_FILENAME} !-d
RewriteRule ^(.*)$ index.php?/$1 [L]

RewriteCond $1 !^(favicon\.ico|robots\.txt|
sitemap\.xml|index\.php|tiny_mce_gzip\.php|__swift)
[NC]
RewriteCond $1 !\.(jpg|jpeg|png|gif|js|css|htm|html)$ [NC]
RewriteCond %{REQUEST_FILENAME} !-f
RewriteCond %{REQUEST_FILENAME} !-d
RewriteRule ^([a-zA-Z0-9]*)/(.*)$ $1/index.php?/$2 [L]
</IfModule>
```

### If you use nginx:

- a. Open your `nginx.conf` configuration file (this may be located under `/usr/local/nginx/conf/`, but it depends how you have configured your nginx web server).
- b. Add the following location directive (note that this is the location directive we use on our server - this may vary depending on your configuration, especially if you have custom apps installed):

```
location ~
^/(admin|api|cron|intranet|rss|setup|
staff|visitor|winapp|__swift|__
swift/cache|__swift/onsite|onsite|__
swift/thirdparty/fusioncharts/Code/FusionCharts|__
swift/thirdparty/fusioncharts/
Charts|__swift/themes|__swift/javascript/__
global/thirdparty/TinyMCE/plugins)(.*)$ {
try_files $uri $uri/ /$1/index.php?$2;
}
```

**NOTE:**

This is an example of working web server rules/settings that can be used in an ideal server setup to switch to SEO friendly URLs.

If the same rules are not working in your server environment, please contact your web server admin to edit the rules accordingly as we do not provide web server specific support.

#### 4.6.18 Disabling staff LoginShare from database

This topic provides instruction on how to disable staff LoginShare from the database.

If you have enabled LoginShare for staff and due to any reason, you are unable to log in at Admin CP because of LoginShare, you can disable staff LoginShare from the database.

1. To achieve this, you would need to make changes in 'swsettings' table and set the value of "loginshare\_staffenable" field as 0.

MySQL query:

```
UPDATE `swsettings` SET DATA = 0 WHERE vkey =  
'loginshare_staffenable';
```

2. Once done, rebuild the help desk cache, using the URL: <http://yourdomain.com/staff/index.php?/Core/Default/RebuildCache>

#### 4.6.19 Changing or modifying the registration policy consent text

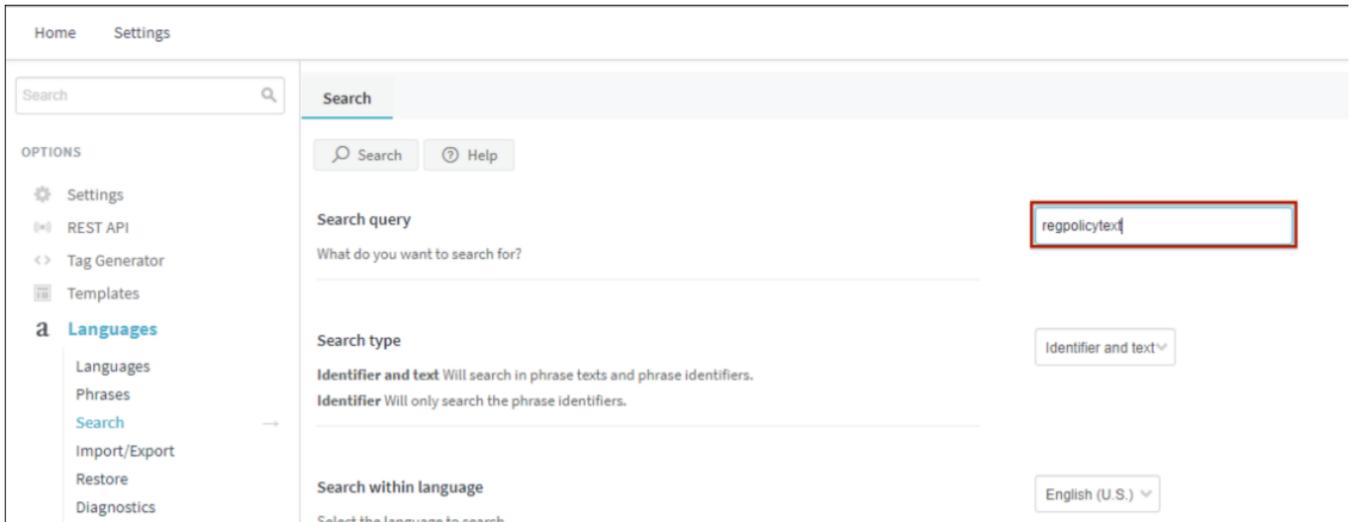
When a user registers or subscribes to get access to your Help Center, they are asked to agree with GFI HelpDesk's Privacy Policy Statement by checking the box of the consent policy statement.

The default statement is, "I consent for GFI HelpDesk to process my data and agree to the terms of the Privacy Policy." This statement can be customized for your organization.

This topic provides the steps on how to alter the text on the Privacy Policy Statement.

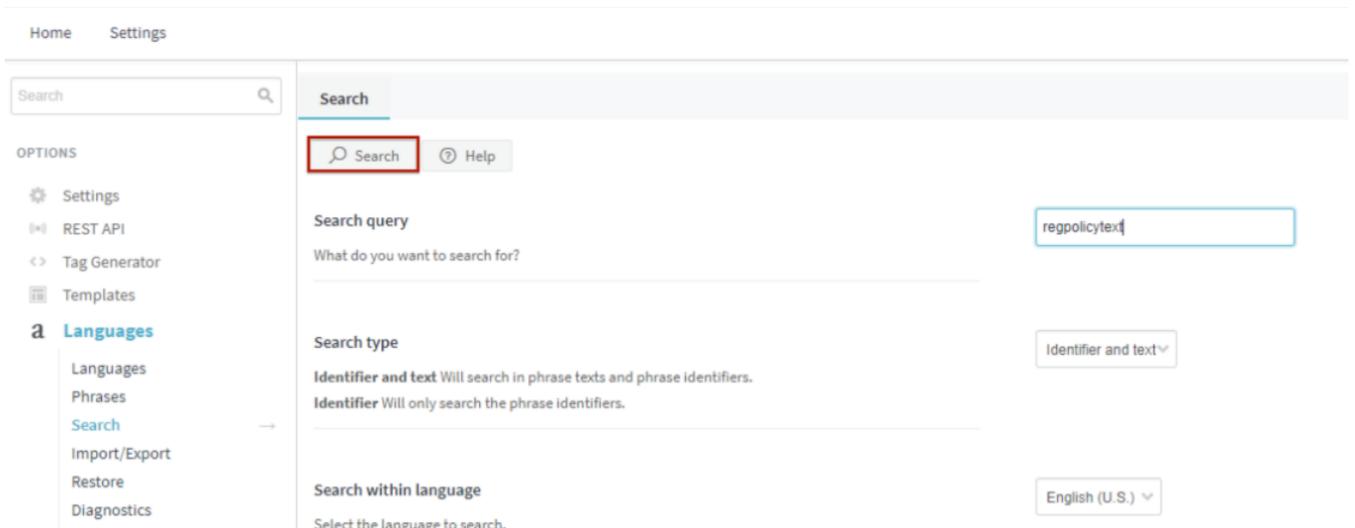
To modify the registration policy consent text:

1. Log in to GFI HelpDesk Admin CP and go to **Languages > Search**.
2. In the Search field, enter `regpolicytext`.



Screenshot 148: Type regpolicytext in search field

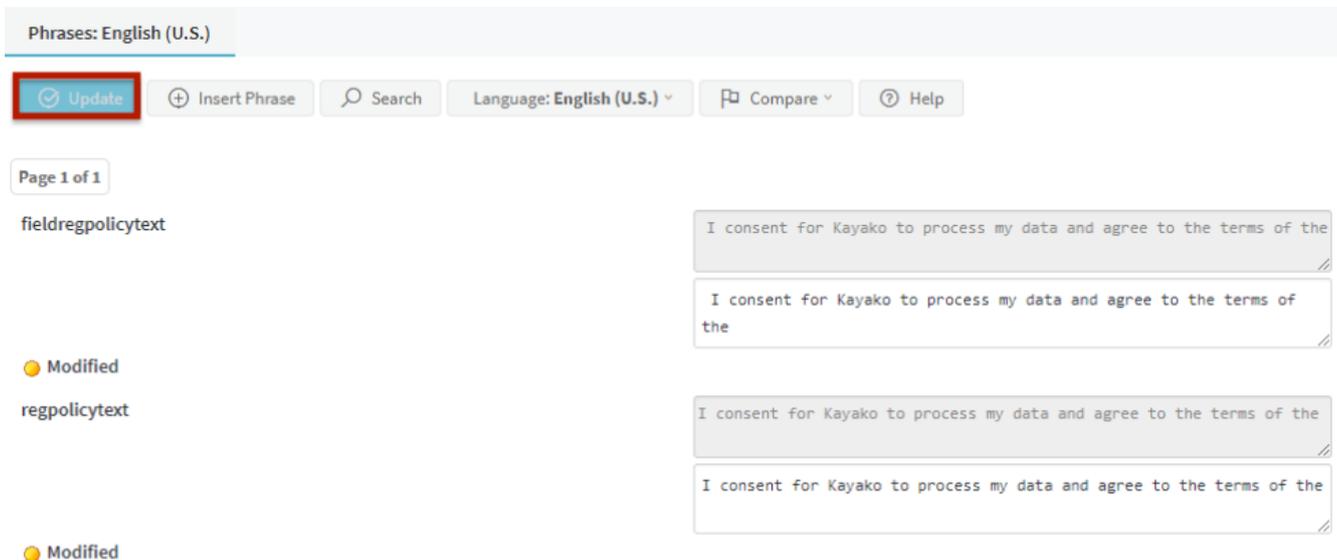
3. Click **Search**.



Screenshot 149: Click search

4. Modify the text inside the box for the fields `fieldregpolicytext` and `regpolicytext` to your desired message.

5. Click **Update** to save the changes.



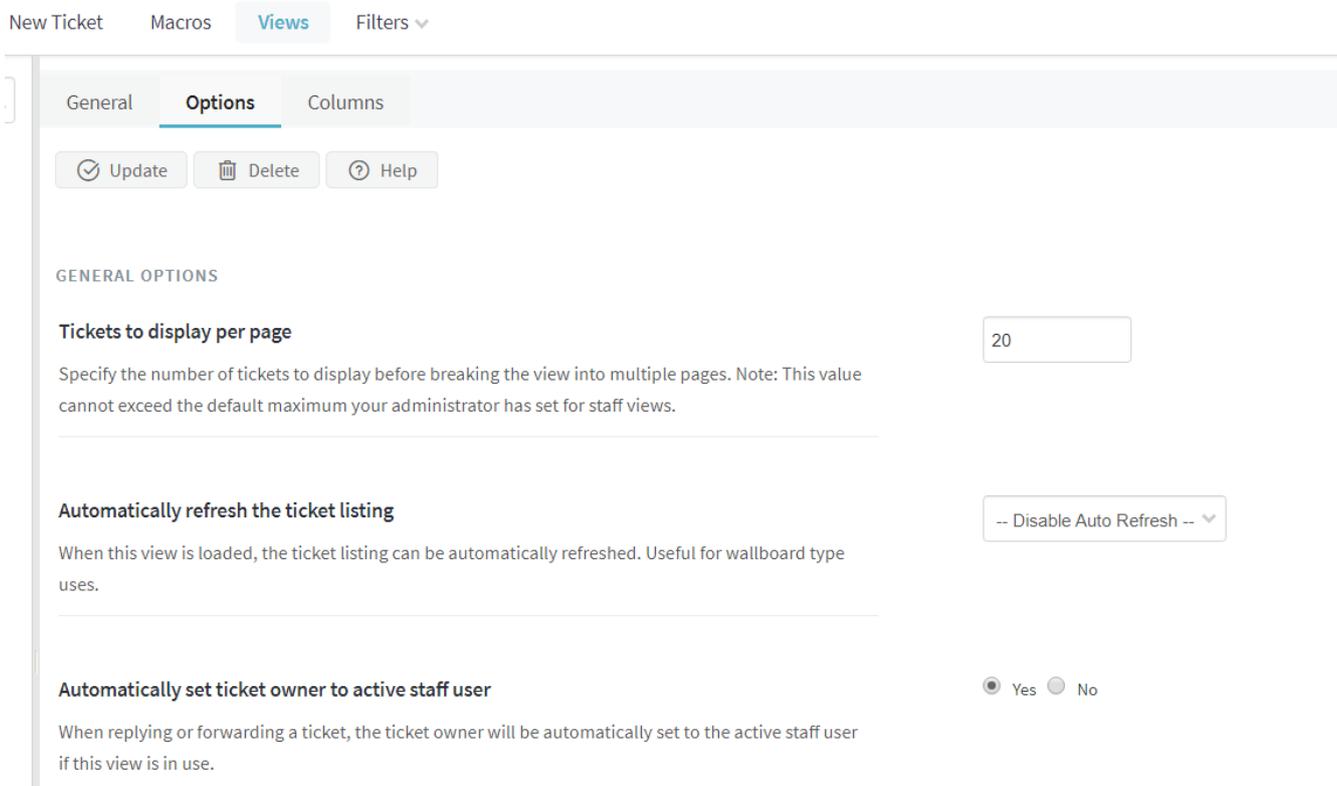
Screenshot 150: Click update

#### 4.6.20 Disabling 'Automatically set ticket owner to active staff user' option

When a staff member answers a ticket, they automatically become the ticket owner. This topic guides you through the process of deactivating such a setting.

To deactivate, follow the below steps:

1. Login to staff control panel.
2. Go to **Tickets > Views > [view name] > Options**.
3. On this page set the field **Automatically set ticket owner to active staff user** to **No** for all views that you use on your Staff Panel.



Screenshot 151: Set **Automatically set ticket owner to active staff user** to No

## 4.6.21 Sending emails in bulk

Sometimes, might need to send emails in bulk, for example, general updates to all the end users. This topic outlines how to do that using GFI HelpDesk.

GFI HelpDesk has not been designed to send emails in bulk. Also, it is essential to highlight that sending emails without the proper authentication (SPF, DKIM, DMARC) or content may result in domain or IP addresses reputation to decrease and therefore been marked as spam or blacklisted.

However, there are two workarounds:

- » Use the Bulk conversation API to create a bunch of conversations with the same content that sends out an email to the requesters.
- » Use integration with an application like MailChimp that sends the email for you. You can use Zapier to set the integration up as it does not require any programming knowledge.

The outcome depends on which option you choose, but the primary purpose to send an email to all the end users in bulk in met.

## 4.6.22 Preventing spam tickets in GFI HelpDesk

Spam tickets can only be created via the 3 possible ticket creation channels

- » Email parser (incoming tickets via email)
- » Ticket submission form (from the Help Center)
- » Offline Live Chat messages (from the Help Center)

This topic guides you on how to check these ticket creation channels' and tweak the settings to prevent spam ticket creation.

To prevent spam tickets, do the following:

1. Check the source of the spam email: Open any of the spam tickets and go to the Audit Logs tab. Under the **Entry type**, it shows either Parser or User.

- » If Entry type is Parser, then the source is the Email Parser.
- » If Entry type is User, then the source is tickets submitted via the Help Center.

2. To prevent spam from being created by the Email parser (incoming tickets via email).

- » Set up [email parser rules](#) to ignore email from specific email address or content e.t.c.
- » Add the source address to a [ban list](#) by marking the source address as spam

3. To stop spam tickets are being created via the form of the offline message:

- » Temporarily disable the Chat message routing.
- » This feature can be disabled at Admin CP > Live Chat > Message Routing.

4. To prevent spam from being created from your help center, you can enable the CAPTCHA for ticket submission or hide the ticket submission option for guest (non-logged-in) users.

- » To enable Captcha:
- » Login to Admin CP and go to **Tickets > Settings**.
- » Set **Require users to complete a CAPTCHA when submitting tickets** setting to "YES".
- » To hide ticket submission for guest users:

- » Login to Admin CP and go to **Widgets > Submit a Ticket > Options** tab.
- » Set **Widget visibility** to “**Logged in users only**”

### 4.6.23 Enabling LoginShare for staff user accounts

LoginShare is the mechanism for authenticating your support desk users using an external database or authentication mechanism.

With LoginShare you can integrate your GFI HelpDesk product with your existing Intranet, LDAP (Active Directory) or any third party applications. Single sign-on enables centralized management of staff and user accounts from one single source.

If you already have backend systems and user databases available, this enables you to let your users log in, without registering another account.

#### Enabling LoginShare:

1. To configure LoginShare settings in the support desk, click on the Staff tab on the navigation menu bar, and then click LoginShare.
2. You are presented with all the configurable settings specific to the LoginShare configuration.

<b>Enable external authentication for staff</b>	If this setting is set to Yes, all authentication requests for the staff is first tried against the URL specified below in the "Staff LoginShare URL" field, that is the LoginShare API.
<b>Staff LoginShare API name</b>	Specify a name that you wish to keep for this LoginShare
<b>Staff LoginShare API URL</b>	Specify the LoginShare API URL here. This is a URL to the location of an authentication script.

3. Click Update to upload and save the settings you have made. Once enabled, the system dispatches each login by your staff to the authentication URL. It is important that your LoginShare script is properly tested or you could lock yourself out of the system.

#### LoginShare protocol:

The LoginShare script needs to be designed to receive the following data via POST

- » username: The username entered by the staff
- » password: The password specified by the staff
- » ipaddress: The IP address of staff attempting to login
- » interface: The interface from which staff is attempting to log-in. For example: staff, admin, winapp, mobile

The LoginShare script needs to reply back with an XML format that corresponds to one of the following formats:

It is important to add interface related checks to your script or you could end up allowing access to the Admin CP.

#### Authentication failed

```
<?xml version="1.0" encoding="UTF-8"?>
<loginshare>
<result>0</result>
<message>Invalid Username or Password</message>
</loginshare>
```

## Authentication successful

All staff user accounts created by the LoginShare system have a random password assigned to them.

```
<?xml version="1.0" encoding="UTF-8"?>
<loginshare>
<result>1</result>
<staff>
<firstname>John</firstname>
<lastname>Doe</lastname>
<designation>CEO</designation>
<email>john.doe@gfihelpdesk.com</email>
<mobilenumber>123-456-789</mobilenumber>
<signature>John Doe(john.doe@gfihelpdesk.com)</signature>
<team>Staff</team>
</staff>
</loginshare>
```

### How are staff identified?

Each staff account is identified based on the username of that account. The system expects each username of staff to be unique, otherwise, it simply ends up updating the staff record every time a new staff user attempts to log in.

### How is authentication failure handled?

» Staff control panel

The staff is denied access to the staff control panel.

» Administrator control panel

The system attempts to authenticate the staff against the user account information in GFI HelpDesk's default authentication system(stored in your helpdesk's database). This is to prevent any lockouts in case your LoginShare script fails or becomes unreachable.

All staff accounts created in GFI HelpDesk's default authentication system as a result of LoginShare authentication has secure random passwords assigned to them.

This means that only the staff created prior to the implementation of LoginShare are able to log in using this fallback method.

## 4.6.24 Understanding sections in language packs

This article provides information on the different sections of the Language Packs that you can use in GFI HelpDesk.

The language packs for GFI HelpDesk Fusion are separated into distinct sections. Each section contains a collection of phrases that are common to a particular area of the product. When adding your own language phrase entries, you may want to be sure that you add it under the correct section.

Here is an alphabetical list of the sections available and a short description of which part of the product they are related to:

Section Name	Description
Default	The "global" section. Use this if there is no specific section you would like to target.

Section Name	Description
<b>Changepassword</b>	The change password section of the user account area (after logging in).
<b>Emailarticle</b>	The Email Article feature of the knowledgebase.
<b>Index</b>	The main index page of the client support center.
<b>Knowledgebase</b>	The knowledgebase section.
<b>Lostpassword</b>	The lost password area of the client support center.
<b>Myaccount</b>	The user account area of the client support center (after logging in).
<b>News</b>	Phrases loaded exclusively for the news article RSS feed.
<b>Newsclient</b>	The news section (excluding RSS feed).
<b>Ticketemails</b>	Phrases loaded exclusively for outgoing e-mails related to tickets (such as ticket receipts).
<b>Tickets</b>	The tickets area (ticket list, ticket view, ticket submission, ticket reply).
<b>Troubleshooter</b>	The troubleshooter section.

#### 4.6.25 Configuring remote authentication using LoginShare

LoginShare is a mechanism that can be used to authenticate users against any third party application.

Creating and maintaining customer records over multiple databases is a hassle. GFI HelpDesk offers this by providing LoginShare APIs which lets you authenticate against a third-party database/directory.

LoginShare API works by capturing authentication details, passing them to third-party for authentication and outputting XML payload to confirm the status of authentication.

- » LoginShare is an all-in or nothing system. If authentication is not successful from third-party, GFI HelpDesk doesn't fall back to the local database.
- » A custom script is required to be created and specified in GFI HelpDesk. This script should be globally accessible. The server on which third-party source exists must allow requests to be received from and placed to the web server on which script is placed.
- » The script should capture the POST variables (interface, IP address and authentication details) sent by GFI HelpDesk login form, dispatch them for authentication to the third-party source, and retrieve and output the result in XML format.
- » A local replica (account) is created or updated in GFI HelpDesk database per the information returned in XML. Linking is done on the basis of email address returned by script and password stored for a local profile is randomly generated.
- » Any persistent change to the user or staff account (including password change) needs to be done at third-party source as authentication is done from there and local profile is updated per the information contained in XML returned on successful authentication

##### User loginShare

- » For technical know-how (such as POST variables and XML output) and how to script must be specified in GFI HelpDesk, refer to Enabling LoginShare for User Accounts.

##### Mandatory XML nodes to be returned: 'username', 'email', 'usergroup'

User Group returned in XML should exist in the GFI HelpDesk and must be allowed on the template group from which authentication is being done.

» LoginShare has to be enabled for a template group (via 'Use LoginShare to authenticate users' setting) to route login requests to the specified loginShare script.

### Location: Admin interface > Options > Templates > Groups

If you need to support local database authentication along with third-party, you can create a new template group and disable loginShare. A template group (that is, a unique front-end) can be accessed directly through a web browser via:

`gfihelpdeskdomain/index.php?/templategroupname`

### Staff loginShare

» For technical know-how (such as POST variables and XML output) and how to script must be specified in GFI HelpDesk, refer to Enabling LoginShare for Staff User Accounts.

### Mandatory XML nodes to be returned: 'firstname','lastname','team','email'

Staff Team returned in XML should exist in the GFI HelpDesk. We recommend disallowing loginShare access on 'admin' interface to prevent accidental access and keep GFI HelpDesk secure.

#### NOTE:

All projects on forge are maintained and supported by third-party developers. We do not support the custom development of loginShare scripts.

## 4.6.26 Moderating comments on knowledge base articles

You may want to approve certain comments added by your customers to your knowledge base articles. Also, you may want to delete inappropriate or irrelevant comments or mark them as spam.

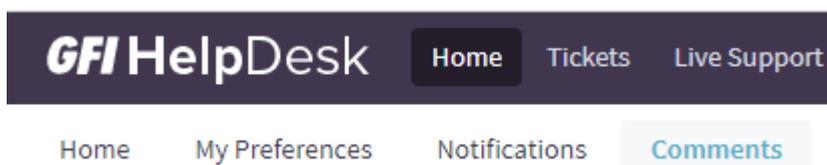
This topic provides instructions to moderate comments on knowledge base articles.

The comments posted by users on knowledge base articles appear in the Staff Control Panel.

Staff members can moderate the comments if their Team has the required permissions. The permissions to moderate the comments can be [assigned to the teams](#) via the Admin Control Panel. The comments can also be configured to be [approved automatically](#).

To moderate comments on knowledge base articles, do the following:

1. Log in to your Staff Control Panel.
2. Navigate to **Home > Comments**.



Screenshot 152: Navigate to comments

3. Select the comment you want to moderate by checking the box next to the author's name.
4. You can **Approve**, **Delete**, or mark the comment as **Spam**.



Approve

Spam

Delete

AUTHOR

COMMENTS

Screenshot 153: Approve, Delete, spam

## 4.6.27 Configuring time zones in GFI HelpDesk

Help desk allows the administrator to set up different time zones according to the requirements, to specify correct Date and Time within different processes.

An administrator can set the date and time format and values by following the below steps:

1. Login to Admin CP and go to **Settings > Date and Time**.
2. **"Enable Automatic Daylight Savings"** can be **enabled/disabled** according to the time. The same time is reflected in the tickets, chats, and reports, etc.

Additionally, **staff members** can select their time zone depending on their requirements by logging to Staff CP and navigating to **Preferences > Time Zone**.

## 4.6.28 Running multiple support sites from one GFI HelpDesk instance

This article is useful in case you are looking to provide support to your clients using different user interfaces, but want to have a single installation and Admin/Staff CP (Control Panel) for your staff.

For example, you wish that your clients can submit tickets or initiate the chat accessing different URLs :

`http://products.com/`

`http://productA.com/`

`http://productB.com/`

Your staff have to assist using one backend, that is, Admin/Staff CP by accessing Products Admin (`http://products.com/admin`) and Products Staff (`http://products.com/staff`).

This can be achieved with the help of multi-domain concept. In this case:

- » The domain which is used as a product URL in the help desk is called the primary domain (`http://products.com/`).
- » Any other domain which is used to access the help desk using a different template group is called secondary domain (`http://productA.com/` or `http://productB.com/`).
- » With the download subscription model, you can use unlimited domains for one license. Also, setting up multi-domain is not possible on SaaS.

The installation of the primary domain is a normal procedure. For the secondary domain, you need to perform the following steps:

1. Place the product files in the document root of the website to be used as a secondary domain.
2. Rename `__/_swift/config/config.php.new` to `__/_swift/config/config.php` and add the database access details of the database being used at the primary domain in it. It means that the database which is used at the primary domain must be accessible through MySQL-CLI from the server, which is used for secondary installation.
3. Place the license key in the document root of the secondary domain. You do not require the license key for the secondary domain.

4. [Create the template groups](#) in the primary domain, which is to be linked with the secondary domain.
5. Make the changes in the config.php file (on the secondary domains), by specifying the template group name.

```
/**
 * SWIFT TEMPLATE GROUP
 * Can be used for multi-point installations. Use this to specify a custom
 * template group to load for this installation.
 */
//define('SWIFT_TEMPLATE_GROUP', 'default');
```

In the above example, **the default** is the template group name of **primary installation**.

### 4.6.29 Sharing secure access to your GFI HelpDesk

Your GFI HelpDesk helpdesk is the central hub for all of your customer support operations. Any issue or bug that can impact your support center needs to be resolved quickly. Although we do our best to provide solutions to common problems in our self-service content and through conversations with our support team, there are times when more hands-on assistance is necessary.

For those situations, our support team may ask you to share direct access to your helpdesk and/or web server to enable us to diagnose and resolve the problem you are running into.

In this section, you can go through our policy on sharing access, and detail the steps necessary for sharing that access in the most secure manner possible.

#### Understanding when and how to share access to your helpdesk

Please remember:

- » Any type of system access is sensitive and should only be done when absolutely necessary.
- » We only request access to your systems when we have exhausted all other options, such as when we are troubleshooting high/critical issues that cannot be addressed through our self-service content or regular support.

With this in mind, the GFI HelpDesk support agent handling your case explains three important things to you in full detail before performing any type of troubleshooting:

- » The error or potential errors causing the issue
- » Which system they require access to and why
- » How the issue is addressed

#### Note:

If your company network policy restricts you from providing access to your systems, let us know and we can discuss alternatives, like shared and/or supervised remote access.

---

### Sharing secure access to your systems

If you need to share secure access to your GFI HelpDesk, FTP/SSH account, or database, we recommend you follow the steps below before handing over your login credentials to the GFI HelpDesk support team.

**Note:**

If your systems are protected by firewall or IP address authentication, let us know so that we can share the GFI HelpDesk office IP address to allow through.

If you are uncomfortable sharing your passwords online, you can use secure password sharing tools like Keybase.io or One-Time Secret.

To share secure access to a GFI HelpDesk administrator account:

1. Log in to your admin control panel.
2. Click on **Staff** and then **Manage Staff** to create a new or edit an existing administrator account.

General Settings

**Username**  
The username will be used with the staff's password to log in to the control panels.

**Password**  
To change this user's password, enter a new password here. Leave blank to leave the existing password in place.  
**Password requirements:** Minimum length: 1 characters, Minimum digits: 0, Minimum symbols: 0, Minimum uppercase letters: 0

Screenshot 154: General setting

3. Under **General Settings**, change the existing password to a random and complex password.
4. Share the **URL** and **login credentials** to the GFI HelpDesk support agent handling your case.
5. Once your issue is resolved, change the password right away.

To share secure access to an FTP or SSH account:

1. Log in to your server and open your FTP or SSH user account.
2. Make sure that the account is a user-level account that has access to the directory in which your support desk is installed.
3. Change the existing password to a random and complex password.
4. Share the server **URL, username, and password** with the GFI HelpDesk support agent handling your case.
5. Once your issue is resolved, log back into your account and change the password right away.

To share 'root' (unrestricted) access to your server:

1. Log in to your server and open your user account.
2. Make sure that the account has root access to your server directory.
3. Create a dummy administrator account with a complex password and full permissions.
4. Share the server URL, username, and password with the GFI HelpDesk support agent handling your case.
5. Once your issue is resolved, log back into your account and change the password right away.

**Note:**

GFI HelpDesk only asks for root access when our ability to diagnose and resolve your issue absolutely requires it (for example, generating or monitoring server logs or making server configuration changes).

To share access to POP3 or IMAP email accounts, databases, and other systems:

1. Log in to your user account.
2. Create a dummy administrator account or change the password of an existing account. Make sure the password is random and complex.
3. Share the username and password with the GFI HelpDesk support agent handling your case.
4. Once your issue is resolved, log back into your account and change the password right away.

Taking extra steps to secure your accounts protects you from unwanted access or changes to your systems. If you are unsure about providing root access to your server or creating new administrator accounts, you can also consult your system admin or IT department for advice and alternatives.

## 4.7 Developer resource

Get detailed instructions for configuring inbound and outbound emails in GFI HelpDesk.

Topics in this section:

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### 4.7.1 GFI HelpDesk REST API - Overview

The GFI HelpDesk REST API lets you quickly develop applications to connect and integrate into your GFI HelpDesk.

Whether building a custom plugin, connecting GFI HelpDesk to another app or pulling data from GFI HelpDesk into your other internal systems, the API lets you retrieve, add and modify data in your helpdesk.

Almost every object in GFI HelpDesk (whether it is a ticket, user, staff, etc) can be manipulated using the API.

---

#### REST basics

A request to the GFI HelpDesk REST API request is simply an HTTP request with the URL set to the path of the helpdesk app (such as Base), controller (like User) and parameters containing the payload of the request.

The GFI HelpDesk API is a "RESTful web API" (read more about the format on Wikipedia). The API uses plain XML for receiving and dispatching data.

The API uses all four REST commands - GET, PUT, POST, DELETE. These commands correspond to respective actions inside the helpdesk.

**Note:**

POST and PUT are not interchangeable. Each has a specified function.

Command	Action	Description
POST	Create	Create an item (such as a ticket).
GET	Retrieve (Read)	Retrieve an item or list of items (such as a list of tickets).
PUT	Update	Modify an existing item or list of items (such as changing the owner of an existing ticket).
DELETE	Delete	Permanently remove an item or group of items (such as deleting a helpdesk user).

**Note:**

Your helpdesk API can be accessed at `your-helpdesk-URL/api/`.

For example: `http://example.domain.com/path-to-helpdesk/api/`

### What a Request Looks Like

```
https://example.domain.com/api/index.php
?e=/App/Controller/Action ¶meterA=valueA ¶meterB=valueB ¶meterC=valueC &apikey=d75a00ef-08b6-5b04-
5d29-d3b7ca46138a &salt=itobgt701t5nat7oor9z4t813edc5t8d&
signature=MzNiNjk4ZmUyY2FINjQ5YmRkNj
A0YjkyYTQ0NmY5OTQ4MGVkyTlwMzZjMzFkYmJmzk4MzgzNjNiMzZjYTE4NQ==
```

The URL you use for the API depends on the URL you find at **Admin Control Panel > API > Settings**. From there you can use a URL similar to `https://mycompany.gfihelpdesk.com/api/` as your API base.

If you encounter an error after multiple attempts, you might need to configure your request with `https://mycompany.gfihelpdesk.com/api/index.php`, and by adding that it should work out fine.

### Authentication

The REST API authenticates to the helpdesk using an API key and a secret - using the API key your connecting application has access to all of your helpdesk's data. This means that the REST API has no concept of staff, team or department permissions.

Every request you make to the API must carry with it an API key, a randomly generated salt string, and a signature.

Component	Where to find it	Information
API key	In the administrator control panel (under REST API).	
Salt	Randomly generated for every request you make to the API.	
Signature	Computed by hashing the salt and the secret key for every request you make to the API.	The signature is a SHA256 hash of the salt with the secret key used as the hashing key.
Secret key	In the administrator control panel (under REST API).	The secret key is never sent in your API requests. It is only used as the key to compute the signature.

## Generating the Signature

To generate a request signature:

1. Generate a random string to create a salt (in PHP, you would use `mt_rand()` to do this)
2. Generate the signature by hashing the salt using SHA256 with the secret key as the key (in PHP, you would use `hash_hmac()` to do this)
3. base64 encode the signature (in PHP, you would use `base64_encode()` to do this)
4. URL encode the output (in PHP, you would use `urlencode()` to do this)

It is recommended that the value of salt be randomized for every request to ensure secure authentication.

## Testing the API

We recommend using cURL. [ReqBin](#) is an easy to use online cURL client. Your helpdesk comes with an API Test Controller, which you can use to quickly test your REST API implementation.

## Advanced

### Request URL Type

#### » Standard:

```
http://example.domain.com/api/index.php?/App/Controller/Action¶meter=1&..
```

#### » With an ?e= parameter:

```
http://example.domain.com/api/index.php?e=/App/Controller/Action¶meter=1&..
```

Some customers on certain types of web server run into problems using one, but not the other (often relating to rewrite rules or security packages).

## Arrays

To post an array using the query string, you should list each item in the array like this:

```
?usergroupid[]=2&usergroupid[]=3&usergroupid[]=X
```

The above example essentially passes an array to your helpdesk containing ( "2", "3", "X" ) for the parameter `usergroupid`.

## Response

The server's response to a REST API request is always an HTTP response with a status code representing the result of the request.

Some responses contains a payload in the body and others don't.

Response code	Description
200 OK	The request was processed successfully.
400 Bad Request	The request cannot be fulfilled due to bad syntax.
401 Unauthorized	Similar to 403 Forbidden, but specifically for use when authentication is possible but has failed or not yet been provided.

Response code	Description
403 Forbidden	The request was a legal request, but the server is refusing to respond to it.
404 Not Found	The requested resource could not be found but may be available again in the future.
405 Not Allowed	A request was made of a resource using a request method not supported by that resource; for example, using GET on a form which requires data to be presented via POST, or using PUT on a read-only resource.

## List of GFI HelpDesk APIs

This section provides the current list of REST APIs that GFI HelpDesk provides.

Below is the list of GFI HelpDesk APIs.

### Note:

Red=Required.

Blue = Either of the value

## REST - UserSearch

This topic provides details about the **REST - UserSearch API** call that GFI HelpDesk uses, including its field types, Arguments, and sample responses.

POST /Base/UserSearch

Run a search on Users. You can search users from email, full name, phone, organization name, and user group.

### Post Variables

Name	Description
query	The Search Query

### Response

```
<users>
<user>
<id>1</id>
<usergroupid>2</usergroupid>
<userrole>manager</userrole>
<userorganizationid>1</userorganizationid>
<salutation>Mr.</salutation>
<userexpiry>0</userexpiry>
<fullname>John Doe</fullname>
<email>john.doe@gfi.com</email><email>john@gfi.com</email>
<designation>CEO</designation>
<phone>123456789</phone>
<dateline><![CDATA[1296540309]]]><![CDATA[></dateline>
<lastvisit><![CDATA[0]]]><![CDATA[></lastvisit>
<isenabled><![CDATA[1]]]><![CDATA[></isenabled>
<timezone>GMT</timezone>
<enabledst><![CDATA[0]]]><![CDATA[></enabledst>
<slaplanid><![CDATA[0]]]><![CDATA[></slaplanid>
<slaplanexpiry><![CDATA[0]]]><![CDATA[></slaplanexpiry>
</user>
</users>
```

## REST - UserGroup

This article provides details about the REST - UserGroup API call that GFI HelpDesk uses, including its field types, arguments, and responses.

### GET /Base/UserGroup

Retrieve a list of all user groups in the helpdesk.

### Response

```
<usergroups>
<usergroup>
<id>1</id>
<title>Registered</title>
<grouptype>registered</grouptype>
<ismaster>1</ismaster>
</usergroup><usergroup>
<id>2</id>
<title>Guest</title>
<grouptype>guest</grouptype>
<ismaster>1</ismaster>
</usergroup><usergroup>
<id>3</id>
<title>Clients</title>
<grouptype>registered</grouptype>
<ismaster>0</ismaster>
</usergroup>
</usergroups>
```

GET /Base/UserGroup/\$id\$

Retrieve the user group identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user group

### Response

Unknown macro: 'api-response-ok'

PUT /Base/UserGroup/\$id\$

Update the user group identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user group
title	The title of the user group

### Response

```
<usergroups>
<usergroup>
<id>1</id>
<title>Registered</title>
<groupype>registered</groupype>
<ismaster>1</ismaster>
</usergroup>
</usergroups>
```

POST /Base/UserGroup

Create a user group.

### Arguments

Name	Description
title	The title of the user group
groupype	The type of user group('guest' or 'registered')

### Response

```
<usergroups>
<usergroup>
<id>1</id>
<title>Registered</title>
<groupype>registered</groupype>
<ismaster>1</ismaster>
</usergroup>
</usergroups>
```

DELETE /Base/UserGroup/\$id\$

Delete the user group identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user group

## 4.7.2 Generating API signature using PHP

A request to the GFI HelpDesk REST API is simply an HTTP request with the URL set to the path of the helpdesk app (such as Base), the controller (like User), and the parameters containing the payload of the request.

Unlike the GFI HelpDesk Staff API, the REST API does not require a staff user account to authenticate. The REST API authenticates to the helpdesk using an API key and a secret.

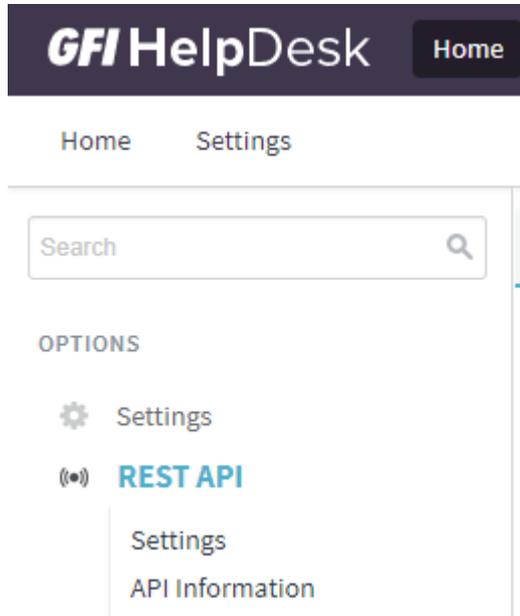
By using the API key, your connecting application gains access to your helpdesk's data. This means that the REST API has no concept of staff, team, or department permissions.

Every request you make to the API must carry with it an API key, a randomly generated salt string, and a signature. This topic focuses on providing the steps to generate the signature for API calls using PHP.

The signature is computed by hashing the salt and the secret key for every request you make to the API. The signature is a SHA256 hash of the salt with the secret key used as the hashing key.

To generate an API signature, follow the steps below:

1. Login to Admin CP and go to **REST API > API Information**.



Screenshot 155: API information navigation

2. Copy your REST API key and secret key information.

3. Edit the PHP code snippet template below by following these instructions:

Replace the values of the `$apiKey` and `$secretKey` variables with the REST API and secret key information you have obtained.

In this example, a **static 10-digit number** is used as the value of **salt**. It is less secure, but it makes the process more straightforward. You can also generate a random string for the value of **salt** using [PHPTester](#). After determining your 10-digit salt, replace `mt_rand()` with the salt code, for example, `$salt = 1234567890;`

```

<?php
$apiKey = "apikey";

$secretKey = "secretkey";

// Generates a random string of ten digits
$salt = mt_rand();

// Computes the signature by hashing the salt with the secret key as the key
$signature = hash_hmac('sha256', $salt, $secretKey, true);

// base64 encode...
$encodedSignature = base64_encode($signature);

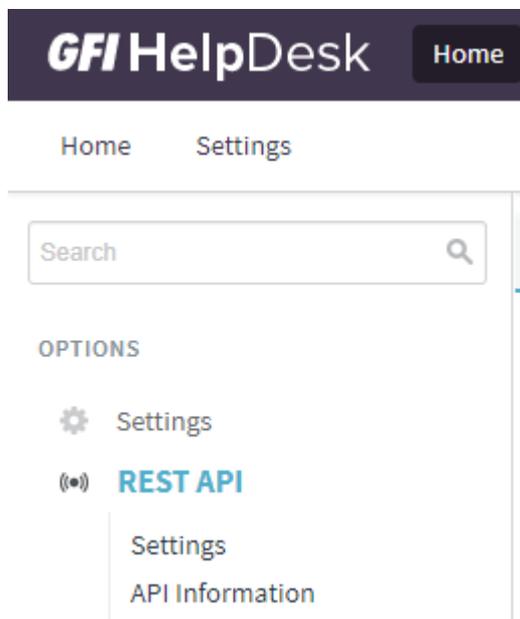
// urlencode...
$encodedSignature = urlencode($encodedSignature);

echo "Voila! A signature: " . $encodedSignature;

?>

```

4. Copy the code snippet and go to PHPTester. Paste the code on the first field. Click the **Click to test your php code** button to generate a signature key.



Screenshot 156: PHP tester

### 4.7.3 Exporting knowledge base articles to GFI HelpDesk

There is no built-in method of exporting knowledge base (KB) articles through GFI HelpDesk's user interface. However, you can export knowledge base data using API calls.

This article provides instructions on how to generate the API query syntax to export all KB article data to GFI HelpDesk.

Before you begin constructing your API query syntax, ensure that the helpdesk API is active.

### Generating a signature

To generate a signature, refer For more information, refer to [Generating API signature using PHP](#) (page 210)..

### Constructing the query syntax

1. Use the generated API signature above to construct the following query syntax based on the REST KnowledgeArticle method and principles:

```
GET http://<gfihelpdeskdomain>/api/index.php?/  
Knowledgebase/Article&salt=1234567890&apikey  
=[API Key from Admin Panel]&signature=[Code generated signature]
```

2. Replace `<gfihelpdesk domain>` with your GFI HelpDesk domain.

3. Replace the **API Key and Signature** with the information you have gathered from the steps above. Remember to remove the [ ] brackets when pasting the API Key and Signature.

Example:

```
GET http://user-123.gfihelpdesk.com/api/index.php?/  
Knowledgebase/Article&salt=1234567890&apikey=test1abc-de23-45ef-g6h7-1234567890&  
signature=wgBY%2FuY9pRRDm0AVF1BCXE1hiCcnzARC3qocAe6b0LA%3D
```

4. Use **Postman**, or you may remove **GET** from the query and copy the URL directly to the browser's address bar to receive the payload output. This process returns all the knowledge base articles' information (including text and data embedded) in XML format.

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" ?>  
<kbarticles>  
  <kbarticle>  
    <kbarticleid>  
      <![CDATA[ 46 ]]>  
    </kbarticleid>  
    <contents>  
      <![CDATA[  
        <strong><em>Testing<br /><br /></em></strong><span style="font-size: 10pt;">Public Article</span><strong><em><br /></em></strong>  
      ]]>  
    </contents>  
    <contentstext>  
      <![CDATA[ Testing Public Article ]]>  
    </contentstext>  
    <categories>  
      <categoryid>  
        <![CDATA[ 15 ]]>  
      </categoryid>  
    </categories>  
    <creator>  
      <![CDATA[ 2 ]]>  
    </creator>  
  </kbarticle>  
</kbarticles>
```

Screenshot 157: Sample output

## 4.7.4 Enabling GFI HelpDesk's REST API

GFI HelpDesk's REST API lets you quickly develop applications that connect and integrate into your GFI HelpDesk.

Before you can make API calls, you need to make sure that the helpdesk API is active or enabled.

This topic provides the steps on how to activate or enable GFI HelpDesk's REST/helpdesk API.

To activate the helpdesk API:

1. Log in to the **Admin Control Panel** using the following URL:

```
<yourdomain>.gfihelpdesk.com/admin
```

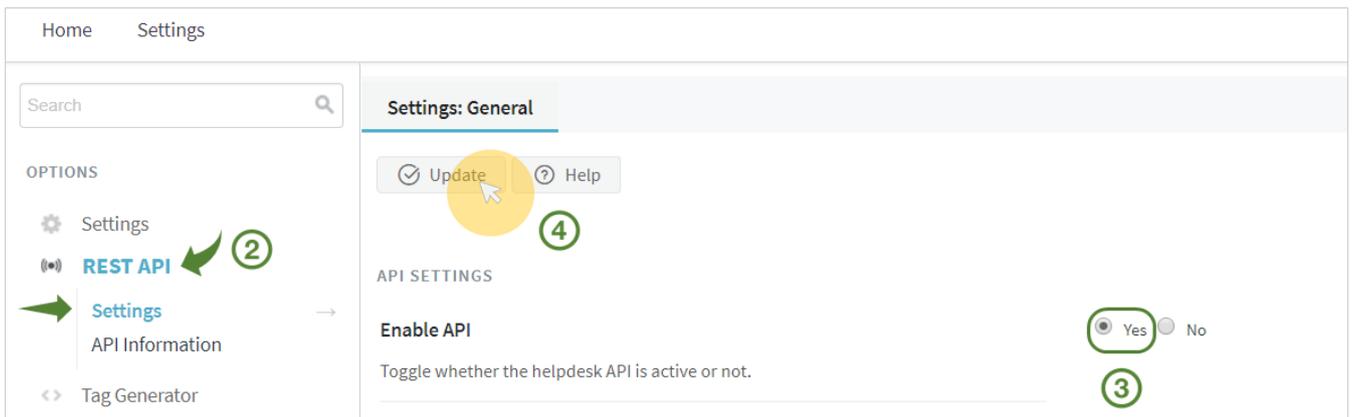
2. Select the **REST API** option and click Settings.

3. Click the **Yes** radio button corresponding to the Enable API option.

**Note:**

Selecting **No** disables the function.

4. Click **Update** to save the changes:



Screenshot 158: Click update

## 4.7.5 Code snippets for generating an API signature

The topic provides the code snippets covering the process to generate GFI HelpDesk API Signature in various programming languages.

Following is the process to generate GFI HelpDesk API Signature, in various programming languages:

PHP

```
<?php

$apiKey = "apikey";

$secretKey = "secretkey";

// Generates a random string of ten digits
$salt = mt_rand();

// Computes the signature by hashing the salt with the secret key as the key
$signature = hash_hmac('sha256', $salt, $secretKey, true);

// base64 encode...
$encodedSignature = base64_encode($signature);
```

```
// urlencode...
$encodedSignature = urlencode($encodedSignature);

echo "Voila! A signature: " . $encodedSignature;

?>
```

C#

```
namespace GFI HelpDeskIntegration
{
class Program
{
static void Main()
{
var apiKey = "apikey";
var secretKey = "secretkey";

// Generate a new globally unique identifier for the salt
var salt = System.Guid.NewGuid().ToString();

// Initialize the keyed hash object using the secret key as the key
HMACSHA256 hashObject = new HMACSHA256(Encoding.UTF8.GetBytes(secretKey));

// Computes the signature by hashing the salt with the secret key as the key
var signature = hashObject.ComputeHash(Encoding.UTF8.GetBytes(salt));

// Base 64 Encode
var encodedSignature = Convert.ToBase64String(signature);

// URLEncode
encodedSignature = System.Web.HttpUtility.UrlEncode(encodedSignature);

Console.WriteLine("Voila! A signature: " + encodedSignature);

Console.ReadKey();

}
}
}
```

Ruby

```
# Required Libraries
require 'openssl'
require 'base64'
require 'URI'
```

```

api_key = "apikey"
secret_key = "secretkey"

# URL encode
def urlIncode(string)
URI.escape(string, Regexp.new("[Generating an API Signature^#{URI::PATTERN::UNRESERVED}]"))
end

# Generates a random string salt
salt = rand(10000000000).to_s

# Computes the signature by hashing the salt with the secret key as the key
hash = OpenSSL::HMAC.digest('sha256', secret_key, salt)

# base64 encode...
signature = urlIncode(Base64.encode64(hash));

```

## Python

```

import hashlib
import random
import base64
import urllib
import hmac

apikey = "apikey"
secretkey = "secretkey"

# Generates a random string of ten digits
salt = str(random.getrandbits(32))

# Computes the signature by hashing the salt with the secret key as the key
signature = hmac.new(secretkey, msg=salt, digestmod=hashlib.sha256).digest()

# base64 encode...
encodedSignature = base64.encodestring(signature).replace('\n', '')

# urlencode...
encodedSignature = urllib.quote(encodedSignature)

print "Voila! A signature: " + encodedSignature

```

```
import java.io.ByteArrayOutputStream;
import java.io.IOException;
import java.io.UnsupportedEncodingException;
import java.net.URLEncoder;
import java.security.GeneralSecurityException;

import javax.crypto.Mac;
import javax.crypto.spec.SecretKeySpec;

import org.bouncycastle.util.encoders.Base64Encoder;

public class GFI HelpDeskapi {

public static void main(String[] args) throws GeneralSecurityException,
IOException {

String secretKey = "secretKey";
String salt = "0123456789";

String generateHmacSHA256Signature = generateHmacSHA256Signature(salt,
secretKey);
System.out.println("Signature: " + generateHmacSHA256Signature);

String urlEncodedSign = URLEncoder.encode(generateHmacSHA256Signature, "UTF-8");

System.out.println("Url encoded value: " + urlEncodedSign);
}

public static String generateHmacSHA256Signature(String data, String key) throws
GeneralSecurityException {
byte[] hmacData = null;

try {
SecretKeySpec secretKey = new SecretKeySpec(key.getBytes("UTF-8"),
"HmacSHA256");
Mac mac = Mac.getInstance("HmacSHA256");
mac.init(secretKey);
hmacData = mac.doFinal(data.getBytes("UTF-8"));
return new Base64Encoder().encode(hmacData);
} catch (UnsupportedEncodingException e) {
throw new GeneralSecurityException(e);
}
}
}
```

## 4.7.6 GFI HelpDesk hooks

Hooks are placed inside a code file that allows functions in other code files to be run by having them hook into the current code.

### Exposing a hook

It is best to expose a hook when you want a section in your custom code to be available to be hooked into by other code files. This exposed section allows code to be run within your custom code file.

An exposed hook can be called from within the same app or from other custom apps; This makes hooks very versatile in how they are accessed within the GFI HelpDesk suite.

### When to use a hook

To determine if a hook should be used depends on the goal that needs to be achieved. If the functionality that is required to be added needs to manipulate or show data in an app that is not updated by you then utilizing a hook is recommended. This method preferred to manually modify this code because when an update to the app is released, the custom changed to it does not have to be re-added manually.

When a situation as described above is encountered, then that is when using an available hook is recommended.

### How to use a hook

Once it has been determined that a hook is what is needed or needs to be utilized, the following steps outline how to go about doing so.

#### Creating a hook

To create a hook in code that allows others to run custom code within the generated file, one must add a simple line of code. This line of code allows another developer to create a hook file that is executed automatically.

The line of code is laid out as follows:

```
($_hookCode = SWIFT_Hook::Execute('HOOK_NAME')) ? eval($_hookCode) : false;
```

The only stipulation about hooks is that the name must be unique for the app that it is for. Once the hook code has been added to the code file the hook is ready to be used.

#### Using a Hook

A hook is used by creating a hook file in the app where the desired hook to use is located. This file contains the code that is to be run.

##### » Creating the file

The hook file is created within the app where the hook to be used is found. All hook files are contained into a directory called hooks.

The hook file itself follows a specific naming convention, HOOK\_NAME.hook where HOOK\_NAME is the same as the HOOK\_NAME in creating hook code above.

This is an example of how the hook directory and files are set up. `\__apps/appname/hooks/HOOK_NAME.hook`

##### » Coding the file

The code inside the hook file is PHP calls that are not contained within a class or function. The code inside this file should be kept as minimal as possible by keeping all complicated calls within functions that are called from inside the hook file.

The code within this file is executed within the class and function that the hook resides in. As a result, the code has access to all the same functions and variables within that function.

This is an example of how the code within a hook file is laid out.

```
<?php echo "You are running code inside a hook file!"; ?>
```

From inside this hook file libraries can be loaded and more complicated functions can be called to manipulate data or display more information to the user of the web portal.

## Upgrading

When the app, where these created hook files resides, is updated the upgrade never overwrites or removes the hooks directory. This means all of the customizations that have been added is retained between updates and upgrades and does not require additional altering of code each update.

## Examples

A step by step guide illustrating the functionality of **Hooks** organization\_tickets hook.pdf is attached along with the files required to use the sample **Hook**, as organizationtickets.rar, described in the documentation.

---

---

## Directory of hooks

Hooks are placed inside a code file that allows functions in other code files to be run by having them hook into the current code. The framework ships with the hooks listed below.

For instructions on using hooks refer to [GFI HelpDesk hooks](#).

---

---

### REST API

Hooks for the REST API:

restauthentication

**Description:** This hook is executed after successful authentication in the REST API interface.

**Location:** \_\_swift/library/Controllers/class.Controller\_api.php

### Admin control panel

Hooks for the admin control panel:

admin\_dashboard\_init

**Description:** Is executed before any tabs are rendered in the admin dashboard.

**Location:** \_\_swift/apps/base/admin/class.Controller\_dashboard.php

admin\_dashboard\_end

**Description:** Is executed after all tabs are rendered in the admin dashboard.

**Location:** \_\_swift/apps/base/admin/class.Controller\_dashboard.php

admin\_dashboard\_output\_start

**Description:** Is executed before the tab output 'div' containers are rendered in the admin dashboard.

**Location:** \_\_swift/apps/base/admin/class.Controller\_dashboard.php

admin\_dashboard\_output\_end

**Description:** Is executed after the tab output 'div' containers are rendered in the admin dashboard.

**Location:** `__swift/apps/base/admin/class.Controller_dashboard.php`  
`admin_staff_tabs`

**Description:** Is executed after the tabs are rendered in the 'Staff' section of admin control panel.

**Location:** `__swift/apps/base/admin/class.View_Staff.php`  
`admin_staff_runchecks`

**Description:** Is executed after all the checks have been carried out whilst inserting/updating a Staff in admin control panel.

**Location:** `__swift/apps/base/admin/class.Controller_Staff.php`  
`admin_staff_insert`

**Description:** Is executed after a Staff is inserted.

**Location:** `__swift/apps/base/admin/class.Controller_Staff.php`  
`admin_staff_update`

**Description:** Is executed after a Staff is updated.

**Location:** `__swift/apps/base/admin/class.Controller_Staff.php`  
`admin_staff_disable`

**Description:** Is executed when a Staff is disabled.

**Location:** `__swift/apps/base/admin/class.Controller_Staff.php`  
`admin_staff_enable`

**Description:** Is executed when a Staff is enabled.

**Location:** `__swift/apps/base/admin/class.Controller_Staff.php`  
`admin_staff_delete`

**Description:** Is executed when a Staff is deleted.

**Location:** `__swift/apps/base/admin/class.Controller_Staff.php`  
`admin_staffteam_tabs`

**Description:** Is executed after the tabs are rendered in the 'Team' section of admin control panel.

**Location:** `__swift/apps/base/admin/class.View_StaffGroup.php`  
`admin_staffteam_runchecks`

**Description:** Is executed after all the checks have been carried out whilst inserting/updating a Team in admin control panel.

**Location:** `__swift/apps/base/admin/class.Controller_StaffGroup.php`  
`admin_staffteam_insert`

**Description:** Is executed after a Team is inserted.

**Location:** `__swift/apps/base/admin/class.Controller_StaffGroup.php`  
`admin_staffteam_update`

**Description:** Is executed after a Team is updated.

**Location:** `__swift/apps/base/admin/class.Controller_StaffGroup.php`

admin\_staffteam\_delete

**Description:** Is executed when a Team is deleted.

**Location:** `__swift/apps/base/admin/class.Controller_StaffGroup.php`

admin\_department\_tabs

**Description:** Is executed after the tabs are rendered in the 'Department' section of admin control panel.

**Location:** `__swift/apps/base/admin/class.View_Department.php`

admin\_department\_runchecks

**Description:** Is executed after all the checks have been carried out whilst inserting/updating a Department in admin control panel.

**Location:** `__swift/apps/base/admin/class.Controller_Department.php`

admin\_department\_insert

**Description:** Is executed after a Department is inserted.

**Location:** `__swift/apps/base/admin/class.Controller_Department.php`

admin\_department\_update

**Description:** Is executed after a Department is updated.

**Location:** `__swift/apps/base/admin/class.Controller_Department.php`

admin\_department\_delete

**Description:** Is executed when a Department is deleted.

**Location:** `__swift/apps/base/admin/class.Controller_Department.php`

admin\_usergroup\_tabs

**Description:** Is executed after the tabs are rendered in the 'User Group' section of admin control panel.

**Location:** `__swift/apps/base/admin/class.View_UserGroup.php`

admin\_usergroup\_runchecks

**Description:** Is executed after all the checks have been carried out whilst inserting/updating a User Group in admin control panel

**Location:** `__swift/apps/base/admin/class.Controller_UserGroup.php`

admin\_usergroup\_insert

**Description:** Is executed after a User Group is inserted.

**Location:** `__swift/apps/base/admin/class.Controller_UserGroup.php`

admin\_usergroup\_update

**Description:** Is executed after a User Group is updated.

**Location:** `__swift/apps/base/admin/class.Controller_UserGroup.php`

admin\_usergroup\_delete

**Description:** Is executed when a User Group is deleted.

**Location:** `__swift/apps/base/admin/class.Controller_UserGroup.php`

## Staff control panel

Hooks for the staff control panel:

staff\_dashboard\_init

**Description:** Is executed before any tabs are rendered in the staff dashboard.

**Location:** `__swift/apps/base/staff/class.Controller_Home.php`  
staff\_dashboard\_end

**Description:** Is executed after all tabs are rendered in the staff dashboard.

**Location:** `__swift/apps/base/staff/class.Controller_Home.php`  
staff\_dashboard\_counter\_end

**Description:** Is executed after the counters are processed in the staff dashboard.

**Location:** `__swift/apps/base/staff/class.Controller_Home.php`  
staff\_user\_tabs

**Description:** Is executed after the tabs are rendered in the 'User' section of staff control panel.

**Location:** `__swift/apps/base/staff/class.View_User.php`  
staff\_user\_infobox

**Description:** Is executed in the User Information box after all the data is rendered.

**Location:** `__swift/apps/base/staff/class.View_User.php`  
staff\_user\_tree

**Description:** Is executed in the User Tree right after the 'User Groups' nodes.

**Location:** `__swift/apps/base/library/User/class.SWIFT_UserRenderManager.php`  
staff\_user\_runchecks

**Description:** Is executed after all the checks have been carried out whilst inserting/updating a User.

**Location:** `__swift/apps/base/staff/class.Controller_User.php`  
staff\_user\_insert

**Description:** Is executed after a User is inserted.

**Location:** `__swift/apps/base/staff/class.Controller_User.php`  
staff\_user\_update

**Description:** Is executed after a User is updated.

**Location:** `__swift/apps/base/staff/class.Controller_User.php`  
staff\_user\_disable

**Description:** Is executed when a User is disabled.

**Location:** `__swift/apps/base/staff/class.Controller_User.php`  
staff\_user\_enable

**Description:** Is executed when a User is enabled.

**Location:** `__swift/apps/base/staff/class.Controller_User.php`

staff\_user\_delete

**Description:** Is executed when a User is deleted.

**Location:** `__swift/apps/base/staff/class.Controller_User.php`

staff\_userorganization\_tabs

**Description:** Is executed after the tabs are rendered in the 'User Organization' section of staff control panel.

**Location:** `__swift/apps/base/staff/class.View_UserOrganization.php`

staff\_userorganization\_runchecks

**Description:** Is executed after all the checks have been carried out whilst inserting/updating a User Organization.

**Location:** `__swift/apps/base/staff/class.Controller_UserOrganization.php`

staff\_userorganization\_insert

**Description:** Is executed after a User Organization is inserted.

**Location:** `__swift/apps/base/staff/class.Controller_UserOrganization.php`

staff\_userorganization\_update

**Description:** Is executed after a User Organization is updated.

**Location:** `__swift/apps/base/staff/class.Controller_UserOrganization.php`

staff\_userorganization\_delete

**Description:** Is executed when a User Organization is deleted.

**Location:** `__swift/apps/base/staff/class.Controller_UserOrganization.php`

staff\_tickets\_viewtickettab

**Description:** Is executed after all tabs are rendered in the View Ticket controller. This hook can be used to add custom tabs when viewing a ticket.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`

staff\_newticket\_tabs

**Description:** Is executed after all the tabs for New Ticket section are rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`

staff\_newticket\_create

**Description:** Is executed when the New Ticket data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`

staff\_ticket\_edittab

**Description:** Is executed in the Edit tab after the fields are rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`

staff\_ticket\_edit

**Description:** Is executed when the Edit tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`

staff\_ticket\_generaltab

**Description:** Is executed in the General tab after the fields are rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_general`

**Description:** Is executed when the General tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`  
`staff_ticket_generaltoolbar`

**Description:** Is executed in the General tab toolbar after all the buttons are rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_replytabtoolbar`

**Description:** Is executed in the Reply tab toolbar after all the buttons are rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_dispatchtab`

**Description:** Is executed in the Dispatch tab (New Ticket/Reply/Forward) after all the data is rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_workflow`

**Description:** Is executed in the Reply tab after the workflow options are rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_reply`

**Description:** Is executed when the Reply tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`  
`staff_ticket_billingtab`

**Description:** Is executed in the Billing tab after all the data is rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_billing`

**Description:** Is executed when the Billing tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`  
`staff_ticket_forwardtab`

**Description:** Is executed in the Forward tab after all the data is rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`  
`staff_ticket_forward`

**Description:** Is executed when the Forward tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`  
`staff_ticket_followuptab`

**Description:** Is executed in the Follow-Up tab after all the data is rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`

staff\_ticket\_followup

**Description:** Is executed when the Follow-Up tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`

staff\_ticket\_releasetab

**Description:** Is executed in the Release tab after all the data is rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`

staff\_ticket\_release

**Description:** Is executed when the Release tab data is submitted.

**Location:** `__apps/tickets/staff/class.Controller_Ticket.php`

staff\_ticket\_infobox

**Description:** Is executed in the Information box after all the data is rendered.

**Location:** `__apps/tickets/staff/class.View_Ticket.php`

staff\_ticket\_tree

**Description:** Is executed in the Ticket tree right after the 'Trash' node.

**Location:** `__apps/tickets/library/View/class.SWIFT_TicketViewRenderer.php`

staff\_call\_delete

**Description:** Is executed when a Call is deleted.

**Location:** `__apps/livechat/staff/class.Controller_Call.php`

staff\_call\_toolbar

**Description:** Is executed in the Call tab toolbar after all the buttons are rendered.

**Location:** `__apps/livechat/staff/class.View_Call.php`

staff\_call\_tabs

**Description:** Is executed after all the tabs are rendered in the Call section.

**Location:** `__apps/livechat/staff/class.View_Call.php`

staff\_call\_tree

**Description:** Is executed in the Calls tree before all the primary nodes.

**Location:** `__apps/livechat/staff/class.View_Call.php`

staff\_chat\_delete

**Description:** Is executed when a Chat is deleted.

**Location:** `__apps/livechat/staff/class.Controller_ChatHistory.php`

staff\_chat\_submit

**Description:** Is executed when a Chat is updated.

**Location:** `__apps/livechat/staff/class.Controller_ChatHistory.php`

staff\_chat\_toolbar

**Description:** Is executed when a Chat toolbar is rendered.

**Location:** \_\_apps/livechat/staff/class.View\_ChatHistory.php  
staff\_chat\_tabs

**Description:** Is executed when all the Chat tabs are rendered.

**Location:** \_\_apps/livechat/staff/class.View\_ChatHistory.php  
staff\_chat\_generaltab

**Description:** Is executed when all the properties in the General tab under Chat section are rendered.

**Location:** \_\_apps/livechat/staff/class.View\_ChatHistory.php  
staff\_message\_delete

**Description:** Is executed when an offline message is deleted.

**Location:** \_\_apps/livechat/staff/class.Controller\_Message.php  
staff\_message\_viewssubmit

**Description:** Is executed when a message is updated.

**Location:** \_\_apps/livechat/staff/class.Controller\_Message.php  
staff\_message\_reply

**Description:** Is executed when a reply to a message is submitted.

**Location:** \_\_apps/livechat/staff/class.Controller\_Message.php  
staff\_message\_toolbar

**Description:** Is executed when all the toolbar buttons are rendered in the General tab of Messages.

**Location:** \_\_apps/livechat/staff/class.View\_Message.php  
staff\_message\_generaltab

**Description:** Is executed after the primary properties are rendered in the General tab of Messages.

**Location:** \_\_apps/livechat/staff/class.View\_Message.php  
staff\_message\_tabs

**Description:** Is executed after all the tabs are rendered in the Messages section.

**Location:** \_\_apps/livechat/staff/class.View\_Message.php  
staff\_preferences\_submit

**Description:** Is executed when the staff preferences are updated.

**Location:** \_\_swift/apps/base/staff/class.Controller\_Preferences.php  
staff\_preferences\_runchecks

**Description:** Is executed when the checks are run for the submitted data in staff preferences.

**Location:** \_\_swift/apps/base/staff/class.Controller\_Preferences.php  
staff\_preferences\_toolbar

**Description:** Is executed when all the toolbar buttons are rendered in the General tab of Staff Preferences.

**Location:** \_\_swift/apps/base/staff/class.View\_Preferences.php

staff\_preferences\_generaltab

**Description:** Is executed after the primary properties are rendered in the General tab of Staff Preferences.

**Location:** `__swift/apps/base/staff/class.View_Preferences.php`

staff\_preferences\_tabs

**Description:** Is executed after all the tabs are rendered in the Staff Preferences section.

**Location:** `__swift/apps/base/staff/class.View_Preferences.php`

### Client support center

Hooks for the client support center:

client\_init

**Description:** Is executed after the preliminary initialization of client support center interface but before any output is sent to the user.

**Location:** `swift/library/Controllers/class.Controller_client.php`

client\_userlogin

**Description:** Is executed after the user successfully logs in to the client support center.

**Location:** `__swift/apps/base/client/class.Controller_User.php`

client\_user\_register

**Description:** Is executed when the registration form is rendered for the user.

**Location:** `__swift/apps/base/client/class.Controller_UserRegistration.php`

client\_user\_registerchecks

**Description:** Is executed when the registration form is submitted and checks are carried out.

**Location:** `__swift/apps/base/client/class.Controller_UserRegistration.php`

client\_user\_registersubmit

**Description:** Is executed when the registration form is submitted and the user is registered.

**Location:** `__swift/apps/base/client/class.Controller_UserRegistration.php`

client\_user\_profile

**Description:** Is executed when the profile form is rendered.

**Location:** `__swift/apps/base/client/class.Controller_UserAccount.php`

client\_user\_profilechecks

**Description:** Is executed when the profile form is submitted and the checks are carried out.

**Location:** `__swift/apps/base/client/class.Controller_UserAccount.php`

client\_user\_profilesubmit

**Description:** Is executed when the profile form is submitted and the update is carried out.

**Location:** `__swift/apps/base/client/class.Controller_UserAccount.php`

### Visitor (user chat interface)

Hooks for the user chat interface:

visitor\_chat\_request

**Description:** Is executed when the visitor requests a chat.

**Location:** apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_inline

**Description:** Is executed when an inline chat request is dispatched to the visitor.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_start

**Description:** Is executed when the chat is started.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_end

**Description:** Is executed when the chat is ended.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_messagesubmit

**Description:** Is executed when a chat message is submitted.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_message\_submit

**Description:** Is executed when an offline message is submitted.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_survey

**Description:** Is executed when a survey page is rendered.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_surveysubmitpre

**Description:** Is executed before the survey data is submitted.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_surveysubmitpost

**Description:** Is executed after the survey data is submitted.

**Location:** \_\_apps/livechat/visitor/class.Controller\_Chat.php

visitor\_chat\_event

**Description:** Is executed when a chat event is processed.

**Location:** \_\_apps/livechat/library/Chat/class.SWIFT\_ChatEventClient.php

visitor\_chat\_eventaccepted

**Description:** Is executed when a visitor accepts a chat.

**Location:** \_\_apps/livechat/library/Chat/class.SWIFT\_ChatEventClient.php

visitor\_chat\_eventnoanswer

**Description:** Is executed when the chat was not answered.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`  
`visitor_chat_eventended`

**Description:** Is executed when the chat ended.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient`

### Desktop (Staff Chat Interface)

Hooks for the staff chat interface:

`desktop_chat_event`

**Description:** Is executed when a chat event is processed.

**Location:** `apps/livechat/library/Chat/class.SWIFT_ChatEventWinapp.php`

`desktop_incoming`

**Description:** Is executed when an incoming XML event node is received.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`

`desktop_incoming_chat`

**Description:** Is executed when an incoming XML chat node is received.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`

`desktop_incoming_visitor`

**Description:** Is executed when an incoming XML visitor node is received.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`

`desktop_chat_evententer`

**Description:** Is executed when a staff enters the chat.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`

`desktop_chatevent_leave`

**Description:** Is executed when a staff leaves the chat.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`

`desktop_chatevent_refuse`

**Description:** Is executed when a staff refuses the chat.

**Location:** `__apps/livechat/library/Chat/class.SWIFT_ChatEventClient.php`

## 4.7.7 Understanding the GFI HelpDesk Rest API and its methods

This topic provides information on understanding the GFI HelpDesk Representational State Transfer Application Programming Interface (REST API) and its methods.

With version 4, we have implemented the mechanism 'REST API'.

REST is an architecture style for designing networked applications. The idea is that, rather than using complex mechanisms such as Common Object Request Broker Architecture (CORBA), Remote Procedure Call (RPC), or Simple Object Access Protocol (SOAP) to connect between machines, simple HTTP is used to make calls between machines.

An API is a software-to-software interface, not a user interface, using which applications talk to each other without any user knowledge or intervention.

The REST API allows to develop applications or to connect and integrate other applications into the helpdesk. Whether we are building a custom plugin, connecting GFI HelpDesk to another app or pulling data from helpdesk into your other internal systems, the API lets us retrieve, add and modify data in the helpdesk. Almost every object in GFI HelpDesk (a ticket, a user, a staff, etc.) can be manipulated using the API.

In our software, the REST API request is simply an HTTP request with the URL set to the path of the helpdesk module (such as Base), controller (like User) and parameters containing the payload of the request (that is, API key, salt, and signature). The GFI HelpDesk API is a 'RESTful web API'. The API uses plain XML for receiving and dispatching data.

REST API allows the following actions to perform in helpdesk:

- » GET
- » PUT
- » POST
- » DELETE

The API uses all four REST commands (GET, PUT, POST, DELETE). These commands correspond to respective actions inside the helpdesk. Using REST API in helpdesk, the above-mentioned actions can be performed on the following sections:

- » Tickets
- » TicketAttachment
- » TicketCount
- » TicketCustomField
- » TicketNote
- » TicketPost
- » TicketPriority
- » Department
- » Staff
- » TicketSearch
- » TicketStatus
- » TicketTimeTrack

- » StaffGroup
- » TicketType
- » User
- » UserGroup
- » UserOrganization
- » UserSearch
- » News
- » Troubleshooter

#### 4.7.8 Setting staff permissions to moderate comments on knowledge base articles

The staff members can approve, delete, or mark comments as spam provided the team they belong to has the required permissions.

The permissions to delete the comments can be assigned to the teams by the administrator from the Admin Control Panel.

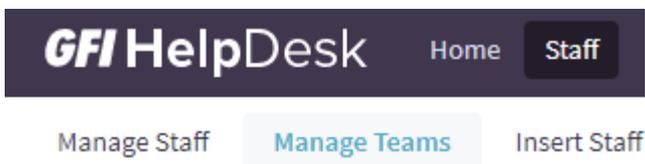
This topic provides steps involved in setting the staff's permission to moderate comments on knowledgebase articles.

**Note:**

You can also configure the [settings to auto-approve](#) the comments.

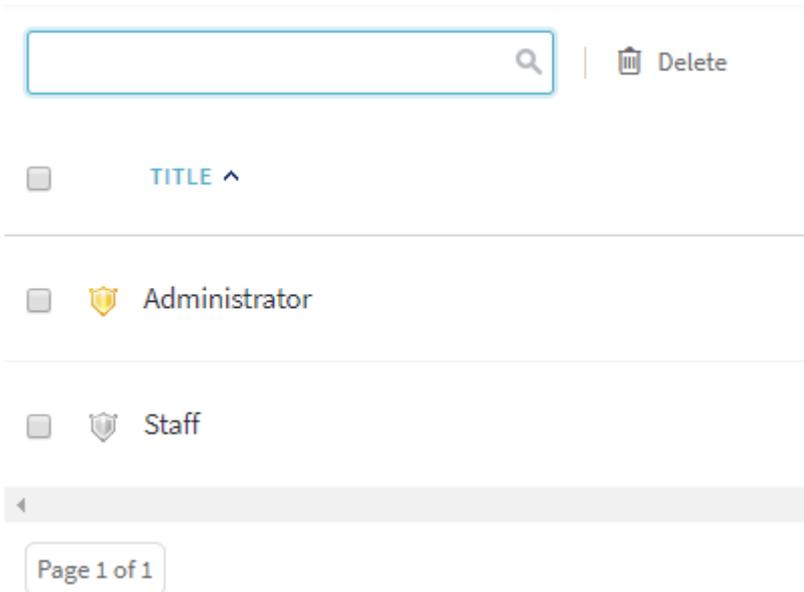
To configure the permission:

1. Log in to your Admin Control Panel.
2. Go to **Staff > Manage Teams**.



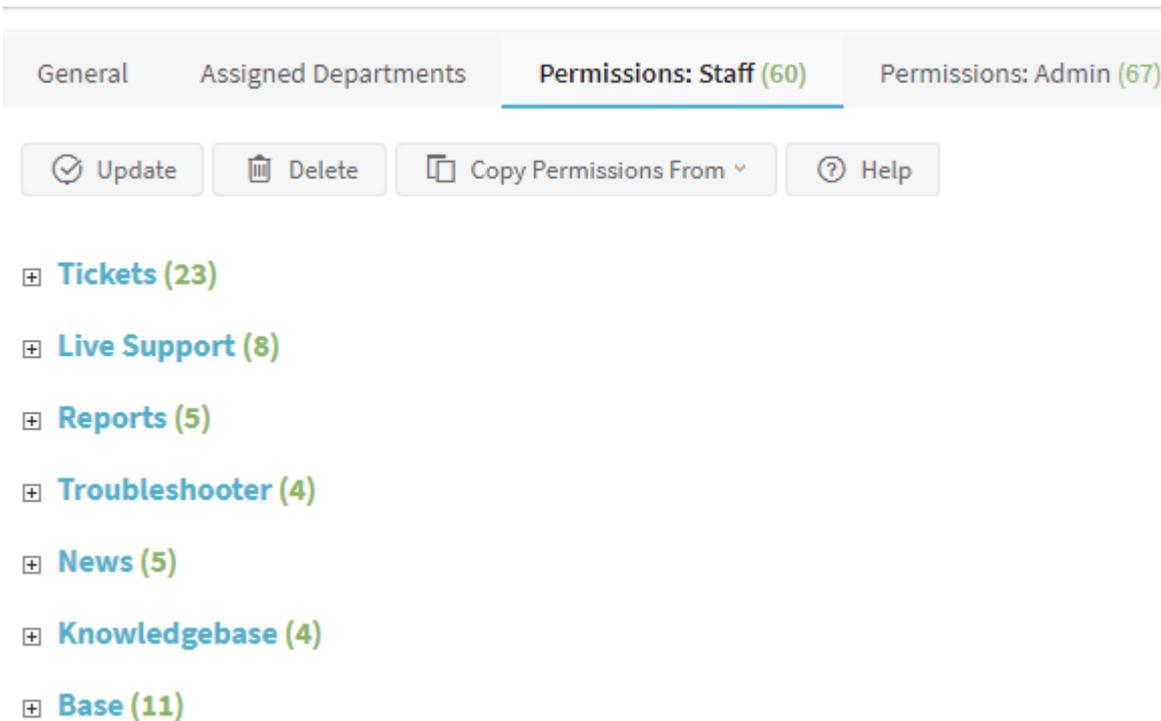
*Screenshot 159: Navigate to manage teams*

3. Select the **Team** you want to manage by checking it.



Screenshot 160: select your team

4. Click the **'Permissions: Staff'** tab and scroll down to the Base section.



Screenshot 161: Click 'Permissions: Staff' tab

5. In the Comments section, select the action (View, Update, or Delete) you want to grant.



Screenshot 162: Select action

6. Click **Update** to save the changes.

### 4.7.9 List of GFI HelpDesk APIs

This section provides the current list of REST APIs that GFI HelpDesk provides.

Below is the list of GFI HelpDesk APIs.

**Note:**

Red=Required.

Blue = Either of the value

## REST - UserSearch

This topic provides details about the **REST - UserSearch API** call that GFI HelpDesk uses, including its field types, Arguments, and sample responses.

POST /Base/UserSearch

Run a search on Users. You can search users from email, full name, phone, organization name, and user group.

### Post Variables

Name	Description
query	The Search Query

### Response

```
<users>
<user>
<id>1</id>
<usergroupid>2</usergroupid>
<userrole>manager</userrole>
<userorganizationid>1</userorganizationid>
<salutation>Mr.</salutation>
<userexpiry>0</userexpiry>
<fullname>John Doe</fullname>
<email>john.doe@gfi.com</email><email>john@gfi.com</email>
<designation>CEO</designation>
<phone>123456789</phone>
<dateline><![CDATA[1296540309]]]><![CDATA[></dateline>
<lastvisit><![CDATA[0]]]><![CDATA[></lastvisit>
<isenabled><![CDATA[1]]]><![CDATA[></isenabled>
<timezone>GMT</timezone>
<enabledst><![CDATA[0]]]><![CDATA[></enabledst>
<slaplanid><![CDATA[0]]]><![CDATA[></slaplanid>
<slaplanexpiry><![CDATA[0]]]><![CDATA[></slaplanexpiry>
</user>
</users>
```

## REST - UserGroup

This article provides details about the REST - UserGroup API call that GFI HelpDesk uses, including its field types, arguments, and responses.

### GET /Base/UserGroup

Retrieve a list of all user groups in the helpdesk.

#### Response

```
<usergroups>
<usergroup>
<id>1</id>
<title>Registered</title>
<grouptype>registered</grouptype>
<ismaster>1</ismaster>
</usergroup><usergroup>
<id>2</id>
<title>Guest</title>
<grouptype>guest</grouptype>
<ismaster>1</ismaster>
</usergroup><usergroup>
<id>3</id>
<title>Clients</title>
<grouptype>registered</grouptype>
<ismaster>0</ismaster>
</usergroup>
</usergroups>
```

### GET /Base/UserGroup/\$id\$

Retrieve the user group identified by \$id\$.

#### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user group

#### Response

Unknown macro: 'api-response-ok'

### PUT /Base/UserGroup/\$id\$

Update the user group identified by \$id\$.

#### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user group
title	The title of the user group

## Response

```
<usergroups>
<usergroup>
<id>1</id>
<title>Registered</title>
<groupype>registered</groupype>
<ismaster>1</ismaster>
</usergroup>
</usergroups>
```

POST /Base/UserGroup

Create a user group.

## Arguments

Name	Description
title	The title of the user group
groupype	The type of user group('guest' or 'registered')

## Response

```
<usergroups>
<usergroup>
<id>1</id>
<title>Registered</title>
<groupype>registered</groupype>
<ismaster>1</ismaster>
</usergroup>
</usergroups>
```

DELETE /Base/UserGroup/\$id\$

Delete the user group identified by \$id\$.

## Arguments

Name	Description
\$id\$	The unique numeric identifier of the user group

## REST-TicketType

This article provides details about the REST - TicketType API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Tickets/TicketType

Retrieve a list of all the ticket types in the helpdesk.

## Response

```

<tickettypes>
<tickettype><id>4</id>
<title>Lead</title>
<displayorder>4</displayorder>
<departmentid>0</departmentid>
<displayicon>{$themepath}icon_typelead.png</displayicon>
<type>private</type><uservisibilitycustom>0</uservisibilitycustom>
</tickettype><tickettype>

<id>5</id><title>Feedback</title>
<displayorder>5</displayorder>
<departmentid>0</departmentid>
<displayicon>{$themepath}icon_lightbulb.png</displayicon>
<type>public</type>
<uservisibilitycustom>1</uservisibilitycustom>
<usergroupid>2</usergroupid>
</tickettype>
</tickettypes>

```

GET /Tickets/TicketType/\$id\$

Retrieve the ticket type identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the ticket type

### Response

```

<tickettypes>
<tickettype>
<id>5</id><title>Feedback</title>
<displayorder>5</displayorder>
<departmentid>0</departmentid>
<displayicon>{$themepath}icon_lightbulb.png</displayicon>
<type>public</type>
<uservisibilitycustom>1</uservisibilitycustom>
<usergroupid>2</usergroupid>
</tickettype>
</tickettypes>

```

### REST-TicketStatus

This article provides details about the REST - TicketStatus API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Tickets/TicketStatus

Retrieve a list of all ticket statuses in the help desk.

## Response

```
<ticketstatuses>
<ticketstatus>

<id>1</id>
<title>Open</title>
<displayorder>1</displayorder>
<departmentid>0</departmentid>
<displayicon>{$themepath}icon_ticketstatusopen.png</displayicon>
<type>public</type>
<displayinmainlist>0</displayinmainlist>
<markasresolved>0</markasresolved>
<displaycount>1</displaycount>
<statuscolor>#8BB467</statuscolor>
<statusbgcolor>#8BB467</statusbgcolor>
<resetduetime>0</resetduetime>
<triggersurvey>0</triggersurvey>
<staffvisibilitycustom>0</staffvisibilitycustom>
</ticketstatus><ticketstatus>

<id>3</id>
<title>Closed</title>
<displayorder>3</displayorder>
<departmentid>0</departmentid>
<displayicon>{$themepath}icon_ticketstatusclosed.png</displayicon>
<type>private</type>
<displayinmainlist>0</displayinmainlist>
<markasresolved>1</markasresolved>
<displaycount>0</displaycount>
<statuscolor>#5f5f5f</statuscolor>
<statusbgcolor>#5f5f5f</statusbgcolor>
<resetduetime>0</resetduetime>
<triggersurvey>1</triggersurvey>
<staffvisibilitycustom>1</staffvisibilitycustom>
<staffgroupid>1</staffgroupid>
</ticketstatus>
</ticketstatuses>
```

GET /Tickets/TicketStatus/\$id\$

Retrieve the ticket status identified by \$id\$.

## Arguments

Name	Description
<code>\$id\$</code>	The unique numeric identifier of the ticket status

## Response

```

<ticketstatuses>
<ticketstatus>
<id>3</id>
<title>Closed</title>
<displayorder>3</displayorder>
<departmentid>0</departmentid>
<displayicon>{$themepath}icon_ticketstatusclosed.png</displayicon>
<type>private</type>
<displayinmainlist>0</displayinmainlist>
<markasresolved>1</markasresolved>
<displaycount>0</displaycount>
<statuscolor>#5f5f5f</statuscolor>
<statusbgcolor>#5f5f5f</statusbgcolor>
<resetduetime>0</resetduetime>
<triggersurvey>1</triggersurvey>
<staffvisibilitycustom>1</staffvisibilitycustom>
<staffgroupid>1</staffgroupid>
</ticketstatus>
</ticketstatuses>

```

## REST-NewsItem

This article provides details about the REST - NewsItem API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /News/NewsItem/ListAll/\$categoryid\$

Retrieve the news item identified by `$categoryid$`.

## Arguments

Name	Description
<code>\$categoryid\$</code>	The news category ID

## Response

```

<newsitems>
<newsitem>
<id><![CDATA[41]]]><![CDATA[>/id>
<staffid><![CDATA[1]]]><![CDATA[>/staffid>
<newstype><![CDATA[1]]]><![CDATA[>/newstype>
<newsstatus><![CDATA[2]]]><![CDATA[>/newsstatus>
<author><![CDATA[Author full name]]]><![CDATA[>/author>
<email><![CDATA[author@domain.com]]]><![CDATA[>/email>
<subject><![CDATA[News subject]]]><![CDATA[>/subject>
<emailsubject /><dateline><![CDATA[1338237929]]]><![CDATA[>/dateline>
<expiry><![CDATA[0]]]><![CDATA[>/expiry>
<issynced><![CDATA[0]]]><![CDATA[>/issynced>
<totalcomments><![CDATA[0]]]><![CDATA[>/totalcomments>

<uservisibilitycustom><![CDATA[1]]]><![CDATA[>/uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]]><![CDATA[>/usergroupid>
<usergroupid><![CDATA[2]]]><![CDATA[>/usergroupid>
<usergroupid><![CDATA[3]]]><![CDATA[>/usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[1]]]><![CDATA[>/staffvisibilitycustom>
<staffgroupidlist><staffgroupid><![CDATA[1]]]><![CDATA[>/staffgroupid>
<staffgroupid><![CDATA[2]]]><![CDATA[>/staffgroupid>
</staffgroupidlist>
<allowcomments><![CDATA[1]]]><![CDATA[>/allowcomments>
<contents><![CDATA[Test]]]><![CDATA[>/contents>
<categories><categoryid><![CDATA[1]]]><![CDATA[>/categoryid>
<categoryid><![CDATA[2]]]><![CDATA[>/categoryid></categories>
</newsitem>
</newsitems>

```

GET /News/NewsItem

Retrieve the list of news items.

## Response

```

<newsitems>
<newsitem>
<id><![CDATA[41]]]><![CDATA[></id>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<newstype><![CDATA[1]]]><![CDATA[></newstype>
<newsstatus><![CDATA[2]]]><![CDATA[></newsstatus>
<author><![CDATA[Author full name]]]><![CDATA[></author>
<email><![CDATA[author@domain.com]]]><![CDATA[></email>
<subject><![CDATA[News subject]]]><![CDATA[></subject>
<mailsubject /><dateline><![CDATA[1338237929]]]><![CDATA[></dateline>
<expiry><![CDATA[0]]]><![CDATA[></expiry>
<issynced><![CDATA[0]]]><![CDATA[></issynced>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>
<uservisibilitycustom><![CDATA[1]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[2]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[3]]]><![CDATA[></usergroupid></usergroupidlist>

<staffvisibilitycustom><![CDATA[1]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist><staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
<staffgroupid><![CDATA[2]]]><![CDATA[></staffgroupid></staffgroupidlist>

<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<contents><![CDATA[Test]]]><![CDATA[></contents>
<categories><categoryid><![CDATA[1]]]><![CDATA[></categoryid>
<categoryid><![CDATA[2]]]><![CDATA[></categoryid></categories></newsitem>
<newsitem><id><![CDATA[42]]]><![CDATA[></id>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<newstype><![CDATA[1]]]><![CDATA[></newstype>
<newsstatus><![CDATA[2]]]><![CDATA[></newsstatus>
<author><![CDATA[Mr. Author]]]><![CDATA[></author>
<email><![CDATA[mr.author@domain.com]]]><![CDATA[></email>
<subject><![CDATA[New subject]]]><![CDATA[></subject>
<emailsubject /><dateline><![CDATA[1338237929]]]><![CDATA[></dateline>
<expiry><![CDATA[0]]]><![CDATA[></expiry>
<issynced><![CDATA[0]]]><![CDATA[></issynced>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>

<uservisibilitycustom><![CDATA[1]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[2]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[3]]]><![CDATA[></usergroupid></usergroupidlist>
<staffvisibilitycustom><![CDATA[1]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist><staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>

```

```
<staffgroupid><![CDATA[2]]]><![CDATA[></staffgroupid></staffgroupidlist>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<contents><![CDATA[Contents]]]><![CDATA[></contents>
<categories><categoryid><![CDATA[1]]]><![CDATA[></categoryid>
<categoryid><![CDATA[2]]]><![CDATA[></categoryid>

</categories></newsitem></newsitems>
```

GET /News/NewsItem/\$id\$

Retrieve the news item identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the news item

### Response

```

<newsitems>
<newsitem>
<id><![CDATA[41]]]><![CDATA[></id>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<newstype><![CDATA[1]]]><![CDATA[></newstype>
<newsstatus><![CDATA[2]]]><![CDATA[></newsstatus>
<author><![CDATA[Author full name]]]><![CDATA[></author>
<email><![CDATA[author@domain.com]]]><![CDATA[></email>
<subject><![CDATA[News subject]]]><![CDATA[></subject>
<emailsubject /><dateline><![CDATA[1338237929]]]><![CDATA[></dateline>
<expiry><![CDATA[0]]]><![CDATA[></expiry>
<issynced><![CDATA[0]]]><![CDATA[></issynced>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>

<uservisibilitycustom><![CDATA[1]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[2]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[3]]]><![CDATA[></usergroupid></usergroupidlist>

<staffvisibilitycustom><![CDATA[1]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist><staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
<staffgroupid><![CDATA[2]]]><![CDATA[></staffgroupid></staffgroupidlist>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<contents><![CDATA[Test]]]><![CDATA[></contents>
<categories><categoryid><![CDATA[1]]]><![CDATA[></categoryid>
<categoryid><![CDATA[2]]]><![CDATA[>
</categoryid>
</categories>
</newsitem>

```

## POST /News/NewsItem

A new news item.

### Argument (POST variables)

Name	Description
subject	The news item subject
contents	The news item contents
staffid	The Staff ID
newstype	The news type. Global: 1, public: 2, private: 3
newsstatus	The news status. Draft: 1, published: 2
fromname	The custom from name used in email notification
email	The custom from email used in email notification

Name	Description
customemailsubject	The custom subject used in email notification
sendemail	Whether to send email notification. 0 or 1
allowcomments	Allow comments. 0 or 1
uservisibilitycustom	The user visibility custom. 0 or 1
usergroupidlist	The user group ID list. Multiple values comma separated like 1,2,3
staffvisibilitycustom	The staff visibility custom. 0 or 1
staffgroupidlist	The staff group id list. Multiple values comma separated like 1,2,3
expiry	The expiry date in the m/d/Y format
newscategoryidlist	The category ID list. Multiple values comma separated like 1,2,3

## Response

```

<newsitems>
<newsitem>
<id><![CDATA[41]]]><![CDATA[></id>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<newstype><![CDATA[1]]]><![CDATA[></newstype>
<newsstatus><![CDATA[2]]]><![CDATA[></newsstatus>
<author><![CDATA[Author full name]]]><![CDATA[></author>
<email><![CDATA[author@domain.com]]]><![CDATA[></email>
<subject><![CDATA[News subject]]]><![CDATA[></subject>
<emailsubject /><dateline><![CDATA[1338237929]]]><![CDATA[></dateline>
<expiry><![CDATA[0]]]><![CDATA[></expiry>
<issynced><![CDATA[0]]]><![CDATA[></issynced>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>

<uservisibilitycustom><![CDATA[1]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[2]]]><![CDATA[></usergroupid>
<usergroupid><![CDATA[3]]]><![CDATA[></usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[1]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist><staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
<staffgroupid><![CDATA[2]]]><![CDATA[></staffgroupid></staffgroupidlist>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<contents><![CDATA[Test]]]><![CDATA[></contents>
<categories><categoryid><![CDATA[1]]]><![CDATA[></categoryid>
<categoryid><![CDATA[2]]]><![CDATA[></categoryid></categories>
</newsitem>
</newsitems>

```

PUT /News/NewsItem/\$id\$

Update news item identified by \$id\$.

### Arguments

Name	Description
subject	The news item subject
contents	The news item contents
editedstaffid	The Staff ID
newsstatus	The news status. Draft: 1, published: 2
fromname	The custom from name used in email notification
email	The custom from email used in email notification
customemailsubject	The custom subject used in email notification
sendemail	Whether to send email notification. 0 or 1
allowcomments	Allow comments. 0 or 1
uservisibilitycustom	The user visibility custom. 0 or 1
usergroupidlist	The user group ID list. Multiple values comma separated like 1,2,3
staffvisibilitycustom	The staff visibility custom. 0 or 1
staffgroupidlist	The staff group id list. Multiple values comma separated like 1,2,3
expiry	The expiry date in the m/d/Y format
newscategoryidlist	The category ID list. Multiple values comma separated like 1,2,3

### Response

```

<newsitems>
<newsitem>
<id><![CDATA[41]]><![CDATA[>/id>
<staffid><![CDATA[1]]><![CDATA[>/staffid>
<newstype><![CDATA[1]]><![CDATA[>/newstype>
<newsstatus><![CDATA[2]]><![CDATA[>/newsstatus>
<author><![CDATA[Author full name]]><![CDATA[>/author>
<email><![CDATA[author@domain.com]]><![CDATA[>/email>
<subject><![CDATA[News subject]]><![CDATA[>/subject><emailsubject />
<dateline><![CDATA[1338237929]]><![CDATA[>/dateline>
<expiry><![CDATA[0]]><![CDATA[>/expiry>
<issynced><![CDATA[0]]><![CDATA[>/issynced>
<totalcomments><![CDATA[0]]><![CDATA[>/totalcomments>

<uservisibilitycustom><![CDATA[1]]><![CDATA[>/uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]><![CDATA[>/usergroupid>
<usergroupid><![CDATA[2]]><![CDATA[>/usergroupid>
<usergroupid><![CDATA[3]]><![CDATA[>/usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[1]]><![CDATA[>/staffvisibilitycustom>
<staffgroupidlist><staffgroupid><![CDATA[1]]><![CDATA[>/staffgroupid>
<staffgroupid><![CDATA[2]]><![CDATA[>/staffgroupid>
</staffgroupidlist>
<allowcomments><![CDATA[1]]><![CDATA[>/allowcomments>
<contents><![CDATA[Test]]><![CDATA[>/contents>
<categories><categoryid><![CDATA[1]]><![CDATA[>/categoryid>
<categoryid><![CDATA[2]]><![CDATA[>/categoryid>
</categories>
</newsitem>
</newsitems>

```

DELETE /News/NewsItem/\$id\$

Delete a news item identified by \$id\$

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the news item

### REST-NewsCategory

This article provides details about the REST - NewsCategory API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /News/Category

Retrieve the list of categories.

## Response

```
<newscategories>
<newscategory>
<id><![CDATA[1]]><![CDATA[></id>
<title><![CDATA[First]]><![CDATA[></title>
<newsitemcount><![CDATA[14]]><![CDATA[></newsitemcount>
<visibilitytype><![CDATA[public]]><![CDATA[></visibilitytype>
</newscategory>
<newscategory>
<id><![CDATA[2]]><![CDATA[></id>
<title><![CDATA[Second]]><![CDATA[></title>
<newsitemcount><![CDATA[14]]><![CDATA[></newsitemcount>
<visibilitytype><![CDATA[public]]><![CDATA[></visibilitytype>
</newscategory>
</newscategories>
```

GET /News/Category/\$id\$

Retrieve a category identified by \$id\$.

Name	Description
\$id\$	The unique numeric identifier of the news category

## Response

```
<newscategories>
<newscategory>
<id><![CDATA[1]]><![CDATA[></id>
<title><![CDATA[First]]><![CDATA[></title>
<newsitemcount><![CDATA[14]]><![CDATA[></newsitemcount>
<visibilitytype><![CDATA[public]]><![CDATA[></visibilitytype>
</newscategory>
</newscategories>
```

POST /News/Category

Create a new News category.

## Arguments (POST variables)

Name	Description
title	The category title
visibilitytype	The visibility type. Possible values are public or private

## Response

```

<newscategories>
<newscategory>
<id><![CDATA[1]]]><![CDATA[></id>
<title><![CDATA[adsf]]]><![CDATA[></title>
<newsitemcount><![CDATA[14]]]><![CDATA[></newsitemcount>
<visibilitytype><![CDATA[public]]]><![CDATA[></visibilitytype>
</newscategory>
</newscategories>

```

PUT /News/Category/\$id\$

Update the News category identified by \$id\$.

### Arguments

Name	Description
title	The category title
visibilitytype	The visibility type. Possible values are public or private

### Response

```

<newscategories>
<newscategory>
<id><![CDATA[1]]]><![CDATA[></id>
<title><![CDATA[First]]]><![CDATA[></title>
<newsitemcount><![CDATA[14]]]><![CDATA[></newsitemcount>
<visibilitytype><![CDATA[public]]]><![CDATA[></visibilitytype>
</newscategory>
</newscategories>

```

DELETE /News/Category/\$id\$

Delete a News category identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the category

## REST - KnowledgebaseCategory

This topic provides details about the REST - KnowledgebaseCategory API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Knowledgebase/Category/ListAll/\$count\$/\$start\$\$sortField\$/\$sortOrder\$

Retrieve a list of all categories.

### Arguments

Name	Description
\$count\$	Items count for retrieval
\$start\$	Start item for retrieval
\$sortField\$	Sort items according to a single specified field
\$sortOrder\$	Sort items according to a single specified order

## Response

```

<kbcategories>
<kbcategory>
<id><![CDATA[70]]]><![CDATA[></id>
<parentkbcategoryid><![CDATA[0]]]><![CDATA[></parentkbcategoryid>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<title><![CDATA[category title]]]><![CDATA[></title>
<totalarticles><![CDATA[1]]]><![CDATA[></totalarticles>
<categorytype><![CDATA[4]]]><![CDATA[></categorytype>
<displayorder><![CDATA[6]]]><![CDATA[></displayorder>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<uservisibilitycustom><![CDATA[0]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist>
<usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[0]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist>
<staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
</staffgroupidlist>

<allowrating><![CDATA[1]]]><![CDATA[></allowrating>
<ispublished><![CDATA[1]]]><![CDATA[></ispublished>
</kbcategory>
<kbcategory>
<id><![CDATA[79]]]><![CDATA[></id>
<parentkbcategoryid><![CDATA[0]]]><![CDATA[></parentkbcategoryid>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<title><![CDATA[The next one]]]><![CDATA[></title>
<totalarticles><![CDATA[6]]]><![CDATA[></totalarticles>
<categorytype><![CDATA[4]]]><![CDATA[></categorytype>
<displayorder><![CDATA[7]]]><![CDATA[></displayorder>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<uservisibilitycustom><![CDATA[0]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist>
<usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[0]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist>
<staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
</staffgroupidlist>
<allowrating><![CDATA[1]]]><![CDATA[></allowrating>
<ispublished><![CDATA[1]]]><![CDATA[></ispublished>
</kbcategory>

```

```
</kbcategories>
```

GET /Knowledgebase/Category/\$id\$

Retrieve a category identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the knowledgebase category

### Response

```
<kbcategories>
<kbcategory>
<id><![CDATA[70]]]><![CDATA[></id>
<parentkbcategoryid><![CDATA[0]]]><![CDATA[></parentkbcategoryid>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<title><![CDATA[category title]]]><![CDATA[></title>
<totalarticles><![CDATA[1]]]><![CDATA[></totalarticles>
<categorytype><![CDATA[4]]]><![CDATA[></categorytype>
<displayorder><![CDATA[6]]]><![CDATA[></displayorder>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<uservisibilitycustom><![CDATA[0]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist>
<usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
</usergroupidlist>
<staffvisibilitycustom><![CDATA[0]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist>
<staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
</staffgroupidlist>
<allowrating><![CDATA[1]]]><![CDATA[></allowrating>
<ispublished><![CDATA[1]]]><![CDATA[></ispublished>
</kbcategory>
</kbcategories>
```

POST /Knowledgebase/Category/

Create a new knowledgebase category.

### Arguments (POST variables)

Name	Description
title	The category title
categorytype	The category type. Global: 1, public: 2, private:3, inherit: 4
parentcategoryid	The parent category ID
displayorder	The display order

Name	Description
articlesortorder	The article sort order. Sort inheriti: 1, sort title: 2, sort rating: 3, sort creationdate: 4, sort displayorder: 5
allowcomments	Allow comments
allowrating	Allow rating
ispublished	Toggle the published yes/no property using this flag
uservisibilitycustom	Toogle the user visibility custom yes/no property using this flag
usergroupidlist	The user group ID list. Multiple values can be comma separated like 1,2,3
staffgroupidlist	The staff group ID list. Multiple values can be comma separated like 1,2,3
staffid	The creator staff ID

## Response

```

<kbcategories>
<kbcategory>
<id><![CDATA[70]]]><![CDATA[></id>
<parentkbcategoryid><![CDATA[0]]]><![CDATA[></parentkbcategoryid>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<title><![CDATA[category title]]]><![CDATA[></title>
<totalarticles><![CDATA[1]]]><![CDATA[></totalarticles>
<categorytype><![CDATA[4]]]><![CDATA[></categorytype>
<displayorder><![CDATA[6]]]><![CDATA[></displayorder>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<uservisibilitycustom><![CDATA[0]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist>
<usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[0]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist>
<staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
</staffgroupidlist>
<allowrating><![CDATA[1]]]><![CDATA[></allowrating>
<ispublished><![CDATA[1]]]><![CDATA[></ispublished>
</kbcategory>
</kbcategories>

```

PUT /Knowledgebase/Category/\$id\$

Update the knowledgebase category identified by \$id\$.

## Arguments

Name	Description
title	The category title

Name	Description
categorytype	The category type. Global: 1, public: 2, private:3, inherit: 4
parentcategoryid	The parent category ID
displayorder	The display order
articledisplayorder	The article sort order. Sort inheriti: 1, sort title: 2, sort rating: 3, sort creationdate: 4, sort displayorder: 5
allowcomments	Allow comments. 0 is for no and 1 is for yes
allowrating	Allow rating. 0 is for no, 1 is for yes
ispublished	Toggle the published yes/no property using this flag
uservisibilitycustom	Toggle the user visibility custom yes/no property using this flag
usergroupidlist	The user group ID list. Multiple values can be comma separated like 1,2,3
staffvisibilitycustom	Toggle the staff visibility custom yes/no property using this flag
staffgroupidlist	The staff group ID list. Multiple values can be comma separated like 1,2,3

## Response

```

<kbcategories>
<kbcategory>
<id><![CDATA[70]]]><![CDATA[></id>
<parentkbcategoryid><![CDATA[0]]]><![CDATA[></parentkbcategoryid>
<staffid><![CDATA[1]]]><![CDATA[></staffid>
<title><![CDATA[category title]]]><![CDATA[></title>
<totalarticles><![CDATA[1]]]><![CDATA[></totalarticles>
<categorytype><![CDATA[4]]]><![CDATA[></categorytype>
<displayorder><![CDATA[6]]]><![CDATA[></displayorder>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<uservisibilitycustom><![CDATA[0]]]><![CDATA[></uservisibilitycustom>
<usergroupidlist><usergroupid><![CDATA[1]]]><![CDATA[></usergroupid>
</usergroupidlist>

<staffvisibilitycustom><![CDATA[0]]]><![CDATA[></staffvisibilitycustom>
<staffgroupidlist>
<staffgroupid><![CDATA[1]]]><![CDATA[></staffgroupid>
</staffgroupidlist>

<allowrating><![CDATA[1]]]><![CDATA[></allowrating>
<ispublished><![CDATA[1]]]><![CDATA[></ispublished>
</kbcategory>
</kbcategories>

```

DELETE /Knowledgebase/Category/\$id\$

Delete a knowledgebase category identified by \$id\$.

## Arguments

Name	Description
\$id\$	The unique numeric identifier of the article

## REST-KnowledgeArticle

This topic provides details about the REST - KnowledgeArticle API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Knowledgebase/Article/ListAll/\$categoryid\$/\$count\$/\$start\$/\$sortField\$/\$sortOrder\$

Retrieve a list of articles identified by \$categoryid\$.

### Arguments

Name	Description
\$categoryid\$	The knowledgebase category ID
\$count\$	Items count for retrieval
\$start\$	Start item for retrieval
\$sortField\$	Sort items according to a single specified field
\$sortOrder\$	Sort items according to a single specified order

### Response

```

<kbarticles>
<kbarticle>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<contents><![CDATA[Contents]]]>
<![CDATA[></contents><contentstext>
<![CDATA[Contents]]]><![CDATA[>
</contentstext><categories><categoryid>
<![CDATA[0]]]><![CDATA[></categoryid>
</categories>
<creator><![CDATA[2]]]><![CDATA[></creator>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<author><![CDATA[Simaranjit Singh]]]><![CDATA[></author>
<email><![CDATA[email@domain.com]]]><![CDATA[></email>
<subject><![CDATA[Subject]]]><![CDATA[></subject>
<isedited><![CDATA[1]]]><![CDATA[></isedited>

<editeddateline><![CDATA[1336757517]]]><![CDATA[></editeddateline>
<editedstaffid><![CDATA[1]]]><![CDATA[></editedstaffid>
<views><![CDATA[24]]]><![CDATA[></views>
<isfeatured><![CDATA[0]]]><![CDATA[></isfeatured>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>
<hasattachments><![CDATA[1]]]><![CDATA[></hasattachments>
<attachments>
<attachment>
<id><![CDATA[4]]]><![CDATA[></id>
<filename><![CDATA[photo.jpg]]]><![CDATA[></filename>
<filesize><![CDATA[88.42 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[5]]]><![CDATA[></id>

<filename><![CDATA[cap_ture1.png]]]><![CDATA[></filename>
<filesize><![CDATA[8.99 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>

```

```
<id><![CDATA[20]]]><![CDATA[></id>

<filename><![CDATA[abcde.txt]]><![CDATA[></filename>
<filesize><![CDATA[0.00 KB]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]><![CDATA
[></link>
</attachment>
</attachments>
<dateline><![CDATA[1335437662]]><![CDATA[></dateline>
<articlestatus><![CDATA[1]]><![CDATA[></articlestatus>
<articlerating><![CDATA[0]]><![CDATA[></articlerating>
<ratinghits><![CDATA[0]]><![CDATA[></ratinghits>
<ratingcount><![CDATA[0]]><![CDATA[></ratingcount>
</kbaricle>
</kbaricles>
```

GET /Knowledgebase/Article

Retrieve a list of all articles.

## Response

```

<kbarticles>
<kbarticle>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<contents><![CDATA[Contents]]]><![CDATA[></contents>
<contentstext><![CDATA[Contents]]]><![CDATA[></contentstext>
<categories>
<categoryid><![CDATA[0]]]><![CDATA[></categoryid>
</categories>
<creator><![CDATA[2]]]><![CDATA[></creator>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<author><![CDATA[Simaranjit Singh]]]><![CDATA[></author>
<email><![CDATA[email@domain.com]]]><![CDATA[></email>
<subject><![CDATA[Subject]]]><![CDATA[></subject>
<isedited><![CDATA[1]]]><![CDATA[></isedited>

<editeddateline><![CDATA[1336757517]]]><![CDATA[></editeddateline>
<editedstaffid><![CDATA[1]]]><![CDATA[></editedstaffid>
<views><![CDATA[24]]]><![CDATA[></views>
<isfeatured><![CDATA[0]]]><![CDATA[></isfeatured>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>
<hasattachments><![CDATA[1]]]><![CDATA[></hasattachments>
<attachments>
<attachment>
<id><![CDATA[4]]]><![CDATA[></id>
<filename><![CDATA[photo.jpg]]]><![CDATA[></filename>
<filesize><![CDATA[88.42 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[5]]]><![CDATA[></id>
<filename><![CDATA[cap_ture1.png]]]><![CDATA[></filename>
<filesize><![CDATA[8.99 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[20]]]><![CDATA[></id>
<filename><![CDATA[abcde.txt]]]><![CDATA[></filename>

```

```
<filesize><![CDATA[0.00 KB]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]><![CDATA
[></link>
</attachments>
<dateline><![CDATA[1335437662]]><![CDATA[></dateline>
<articlestatus><![CDATA[1]]><![CDATA[></articlestatus>
<articlerating><![CDATA[0]]><![CDATA[></articlerating>
<ratinghits><![CDATA[0]]><![CDATA[></ratinghits>
<ratingcount><![CDATA[0]]><![CDATA[></ratingcount>
</kbaricle>
</kbaricles>
```

GET /Knowledgebase/Article/\$id\$

Retrieve an article identified by \$ i d\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the knowledgebase article

### Response

```

<kbarticles>
<kbarticle>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<contents><![CDATA[Contents]]]><![CDATA[></contents>
<contentstext><![CDATA[Contents]]]><![CDATA[></contentstext>
<categories>
<categoryid><![CDATA[0]]]><![CDATA[></categoryid>
</categories>
<creator><![CDATA[2]]]><![CDATA[></creator>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<author><![CDATA[Simaranjit Singh]]]><![CDATA[></author>
<email><![CDATA[email@domain.com]]]><![CDATA[></email>
<subject><![CDATA[Subject]]]><![CDATA[></subject>
<isedited><![CDATA[1]]]><![CDATA[></isedited>

<editeddateline><![CDATA[1336757517]]]><![CDATA[></editeddateline>
<editedstaffid><![CDATA[1]]]><![CDATA[></editedstaffid>
<views><![CDATA[24]]]><![CDATA[></views>
<isfeatured><![CDATA[0]]]><![CDATA[></isfeatured>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>
<hasattachments><![CDATA[1]]]><![CDATA[></hasattachments>
<attachments>
<attachment>
<id><![CDATA[4]]]><![CDATA[></id>
<filename><![CDATA[photo.jpg]]]><![CDATA[></filename>
<filesize><![CDATA[88.42 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link></attachment>
<attachment>
<id><![CDATA[5]]]><![CDATA[></id>
<filename><![CDATA[cap_ture1.png]]]><![CDATA[></filename>
<filesize><![CDATA[8.99 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[20]]]><![CDATA[></id>
<filename><![CDATA[abcde.txt]]]><![CDATA[></filename>
<filesize><![CDATA[0.00 KB]]]><![CDATA[></filesize>

```

```

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
</attachments>
<dateline><![CDATA[1335437662]]]><![CDATA[></dateline>
<articlestatus><![CDATA[1]]]><![CDATA[></articlestatus>
<articlerating><![CDATA[0]]]><![CDATA[></articlerating>
<ratinghits><![CDATA[0]]]><![CDATA[></ratinghits>
<ratingcount><![CDATA[0]]]><![CDATA[></ratingcount>
</kbaricle>
</kbaricles>

```

POST /Knowledgebase/Article

A new knowledgebase article.

### Arguments (POST variables)

Name	Description
subject	The article subject
contents	The article contents
creatorid	The Staff ID
articlestatus	Article status. 1 for published, 2 for drafts
isfeatured	Is featured. 0 is for no and 1 is for yes
allowcomments	Allow comments. 0 is for no and 1 is for yes
categoryid	The article category/categories. Multiple categories can be comma separated like 1, 2, 3

### Response

```

<kbarticles>
<kbarticle>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<contents><![CDATA[Contents]]]><![CDATA[></contents>
<contentstext><![CDATA[Contents]]]><![CDATA[></contentstext>
<categories>
<categoryid><![CDATA[0]]]><![CDATA[></categoryid>
</categories>
<creator><![CDATA[2]]]><![CDATA[></creator>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<author><![CDATA[Simaranjit Singh]]]><![CDATA[></author>
<email><![CDATA[email@domain.com]]]><![CDATA[></email>
<subject><![CDATA[Subject]]]><![CDATA[></subject>
<isedited><![CDATA[1]]]><![CDATA[></isedited>

<editeddateline><![CDATA[1336757517]]]><![CDATA[></editeddateline>
<editedstaffid><![CDATA[1]]]><![CDATA[></editedstaffid>
<views><![CDATA[24]]]><![CDATA[></views>
<isfeatured><![CDATA[0]]]><![CDATA[></isfeatured>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>
<hasattachments><![CDATA[1]]]><![CDATA[></hasattachments>
<attachments>
<attachment>
<id><![CDATA[4]]]><![CDATA[></id>
<filename><![CDATA[photo.jpg]]]><![CDATA[></filename>
<filesize><![CDATA[88.42 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[5]]]><![CDATA[></id>

<filename><![CDATA[cap_ture1.png]]]><![CDATA[></filename>
<filesize><![CDATA[8.99 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[20]]]><![CDATA[></id>

```

```

<filename><![CDATA[abcde.txt]]><![CDATA[></filename>
<filesize><![CDATA[0.00 KB]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]><![CDATA
[></link>
</attachment>
</attachments>
<dateline><![CDATA[1335437662]]><![CDATA[></dateline>
<articlestatus><![CDATA[1]]><![CDATA[></articlestatus>
<articlerating><![CDATA[0]]><![CDATA[></articlerating>
<ratinghits><![CDATA[0]]><![CDATA[></ratinghits>
<ratingcount><![CDATA[0]]><![CDATA[></ratingcount>
</kbarcode>
</kbarcode>

```

PUT /Knowledgebase/Article/\$id\$

Update knowledgebase article identified by \$id\$.

### Arguments

Name	Description
editedstaffid	The staff ID
subject	The article subject
contents	The article contents
articlestatus	Article status, 1 for published; 2 for draft
isfeatured	Is featured. 0 is for no and 1 is for yes
allowcomments	Allow comments. 0 is for no and 1 is for yes
categoryid	The article category/categories for an article. Multiple categories can be comma separated like 1, 2, 3

### Response

```

<kbarticles>
<kbarticle>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<contents><![CDATA[Contents]]]><![CDATA[></contents>
<contentstext><![CDATA[Contents]]]><![CDATA[></contentstext>
<categories>
<categoryid><![CDATA[0]]]><![CDATA[></categoryid>
</categories>
<creator><![CDATA[2]]]><![CDATA[></creator>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<author><![CDATA[Simaranjit Singh]]]><![CDATA[></author>
<email><![CDATA[email@domain.com]]]><![CDATA[></email>
<subject><![CDATA[Subject]]]><![CDATA[></subject>
<isedited><![CDATA[1]]]><![CDATA[></isedited>

<editeddateline><![CDATA[1336757517]]]><![CDATA[></editeddateline>
<editedstaffid><![CDATA[1]]]><![CDATA[></editedstaffid>
<views><![CDATA[24]]]><![CDATA[></views>
<isfeatured><![CDATA[0]]]><![CDATA[></isfeatured>
<allowcomments><![CDATA[1]]]><![CDATA[></allowcomments>
<totalcomments><![CDATA[0]]]><![CDATA[></totalcomments>
<hasattachments><![CDATA[1]]]><![CDATA[></hasattachments>
<attachments>
<attachment>
<id><![CDATA[4]]]><![CDATA[></id>
<filename><![CDATA[photo.jpg]]]><![CDATA[></filename>
<filesize><![CDATA[88.42 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[5]]]><![CDATA[></id>

<filename><![CDATA[cap_ture1.png]]]><![CDATA[></filename>
<filesize><![CDATA[8.99 KB]]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]]><![CDATA
[></link>
</attachment>
<attachment>
<id><![CDATA[20]]]><![CDATA[></id>

```

```

<filename><![CDATA[abcde.txt]]><![CDATA[></filename>
<filesize><![CDATA[0.00 KB]]><![CDATA[></filesize>

<link><![CDATA
[http://localhost/fusiongit/trunk/api/index.php?/Knowledgebase/Article/GetAttachment/1/20]]><![CDATA
[></link>
</attachment>
</attachments>
<dateline><![CDATA[1335437662]]><![CDATA[></dateline>
<articlestatus><![CDATA[1]]><![CDATA[></articlestatus>
<articlerating><![CDATA[0]]><![CDATA[></articlerating>
<ratinghits><![CDATA[0]]><![CDATA[></ratinghits>
<ratingcount><![CDATA[0]]><![CDATA[></ratingcount>
</kbarcode>
</kbarcode>

```

DELETE /Knowledgebase/Article/\$id\$

Delete a knowledgebase article identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the article

### REST-CustomField

This topic provides details about the REST - CustomField API call that GFI HelpDesk uses, including its field types, arguments, and responses.

### Environment

API supported in version > v 4.40.882.

### Custom field types

The type of custom field (for example - text area, select box) is denoted by a unique identifier.

Field type	Identifier
Text	1
Text area	2
Password	3
Checkbox	4
Radio	5
Select	6
Multi select	7
Custom	8

Field type	Identifier
Link select fields	9
Date	10
File	11

GET /Base/CustomField

This instruction retrieves a list of custom fields.

### Response

```
<customfields>
<customfield customfieldid="1" customfieldgroupid="1" title="Customer ID" fieldtype="1"
fieldname="cn4ezfbjzvoj" defaultvalue="" isrequired="0" usereditable="0" staffeditable="1" regexvalidate=""
displayorder="1" encryptindb="0" description=""></customfield>
<customfield customfieldid="2" customfieldgroupid="1" title="Product" fieldtype="6" fieldname="llcut44uri9d"
defaultvalue="" isrequired="0" usereditable="0" staffeditable="1" regexvalidate="" displayorder="2" encryptindb="0"
description=""></customfield>
</customfields>
```

GET /Base/CustomField/ListOptions/\$customfieldid\$

Retrieve the list of custom field options.

### Arguments (POST variables)

Name	Description
\$customfieldid\$	The custom field ID to retrieve the options for.

### Response

```
<customfieldoptions>
<option customfieldoptionid="1" customfieldid="2" optionvalue="Resolve" displayorder="2"
isselected="0" parentcustomfieldoptionid="0"></option>
<option customfieldoptionid="2" customfieldid="2" optionvalue="Engage" displayorder="3"
isselected="0" parentcustomfieldoptionid="0"></option>
</customfieldoptions>
```

## REST-UserOrganization

This topic provides details about the REST - UserOrganization API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Base/UserOrganization

Retrieve a list of all organizations in the help desk.

### Response

```
<userorganizations>
<userorganization>
<id>1</id>
<name>GFI HelpDesk.</name>
<organizationtype>restricted</organizationtype>
<address>2nd Floor, Midas Corporate Park, 37 GT Road</address>
<city>Jalandhar</city>
<state>Punjab</state>
<postalcode>144001</postalcode>
<country>India</country>
<phone /><fax /><website>http://www.kayako.com</website>
<!-- Timeline Properties --><dateline>1296540309</dateline>
<lastupdate>1296540309</lastupdate>
<!-- Custom SLA Properties --><slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</userorganization>
</userorganizations>
```

GET /Base/UserOrganization/\$id\$

Retrieve the user organization identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user organization

### Response

```

<userorganizations>
<userorganization>
<id>1</id>
<name>GFI HelpDesk.</name>
<organizationtype>restricted</organizationtype>
<address>2nd Floor, Midas Corporate Park, 37 GT Road</address>
<city>Jalandhar</city>
<state>Punjab</state>
<postalcode>144001</postalcode>
<country>India</country>
<phone />
<fax /><website>http://www.kayako.com</website>
<!-- Timeline Properties --><dateline>1296540309</dateline>
<lastupdate>1296540309</lastupdate>
<!-- Custom SLA Properties --><slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</userorganization>
</userorganizations>

```

PUT /Base/UserOrganization/\$id\$

Update the user organization identified by \$id\$.

### Arguments

Name	Description
name	The name of the user organization
organizationtype	The type of user organization ('restricted' or 'shared')
address	
city	
state	
postalcode	
country	
phone	
fax	
website	
slaplanid	The SLA Plan ID to link with this organization
slaplanexpiry	The UNIX timestamp by which to ignore the SLA Plan, 0 = never expires

### Response

```

<userorganizations>
<userorganization>
<id>1</id>
<name>GFI HelpDesk.</name>
<organizationtype>restricted</organizationtype>
<address>2nd Floor, Midas Corporate Park, 37 GT Road</address>
<city>Jalandhar</city>
<state>Punjab</state>
<postalcode>144001</postalcode>
<country>India</country>
<phone /><fax /> <website>http://www.kayako.com</website>
<!-- Timeline Properties --><dateline>1296540309</dateline>
<lastupdate>1296540309</lastupdate>
<!-- Custom SLA Properties -->
<slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</userorganization>
</userorganizations>

```

## POST /Base/UserOrganization

Create a new user organization record.

### Arguments

Name	Description
name	The name of the user organization.
organizationtype	The type of user organization('restricted' or 'shared')
address	
city	
state	
postalcode	
country	
phone	
fax	
website	
slaplanid	The SLA Plan ID to link with this organization
slaplanexpiry	The UNIX timestamp by which to ignore the SLA Plan, 0 = never expires

### Response

```

<userorganizations>
<userorganization>
<id>1</id>
<name>GFI HelpDesk.</name>
<organizationtype>restricted</organizationtype>
<address>2nd Floor, Midas Corporate Park, 37 GT Road</address>
<city>Jalandhar</city>
<state>Punjab</state>
<postalcode>144001</postalcode>
<country>India</country>
<phone /><fax /> <website>http://www.kayako.com</website>
<!-- Timeline Properties -->
<dateline>1296540309</dateline>
<lastupdate>1296540309</lastupdate>
<!-- Custom SLA Properties --><slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</userorganization>
</userorganizations>

```

DELETE /Base/UserOrganization/\$id\$

Delete the user organization identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user organization

### REST-User

This topic provides details about the REST - User API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Base/User/Filter OR GET /Base/User/Filter/\$marker\$/\$maxitems\$

Retrieve a list of all users in the help desk starting from a marker (user id) till the item fetch limit is reached (by default this is 1000).

### Response

```
<users>
<user><id>1</id>
<usergroupid>2</usergroupid>
<userrole>manager</userrole>
<userorganizationid>1</userorganizationid>
<salutation>Mr.</salutation>
<userexpiry>0</userexpiry>
<fullname>John Doe</fullname>
<email>john.doe@gfi.com</email>
<email>john@gfi.com</email>
<designation>CEO</designation>
<phone>123456789</phone>
<dateline>1296540309</dateline>
<lastvisit>0</lastvisit>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>0</enabledst>
<slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</user>
</users>
```

GET /Base/User/\$id\$

Retrieve the user identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user

### Response

```

<users>
<user><id>1</id>
<usergroupid>2</usergroupid>
<userrole>manager</userrole>
<userorganizationid>1</userorganizationid>
<salutation>Mr.</salutation>
<userexpiry>0</userexpiry>
<fullname>John Doe</fullname>
<email>john.doe@gfi.com</email><email>john@gfi.com</email>
<designation>CEO</designation>
<phone>123456789</phone>
<dateline>1296540309</dateline>
<lastvisit>0</lastvisit>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>0</enabledst>
<slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</user>
</users>

```

PUT /Base/User/\$id\$

Update the user identified by \$id\$.

### Arguments

Name	Description
fullname	The full name of User
usergroupid	The User Group ID (registered group) to assign to this User.
email	The Email Address of User, you can send multiple email addresses by using "email[]" as the key
userorganizationid	The User Organization ID
salutation	The User Salutation, available options are: Mr., Ms., Mrs., Dr.
designation	The User Designation/Title
phone	The Phone Number
isenabled	Toggle whether the user is to be enabled/disabled
userrole	The User Role, available options are: user, manager. Default: user
timezone	The Time Zone
enabledst	Enable Daylight Savings?
slaplanid	The SLA Plan ID to assign to the user
slaplanexpiry	The SLA Plan Expiry, 0 = never expires
userexpiry	The User Expiry, 0 = never expires

### Response

```

<users>
<user>
<id>1</id>
<usergroupid>2</usergroupid>
<userrole>manager</userrole>
<userorganizationid>1</userorganizationid>
<salutation>Mr.</salutation>
<userexpiry>0</userexpiry>
<fullname>John Doe</fullname>
<email>john.doe@gfi.com</email>
<email>john@gfi.com</email>
<designation>CEO</designation>
<phone>123456789</phone>
<dateline>1296540309</dateline>
<lastvisit>0</lastvisit>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>0</enabledst>
<slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</user>
</users>

```

## POST /Base/User

Create a new User record.

### Arguments

Name	Description
fullname	The full name of User
usergroupid	The User Group ID to assign to this User
password	The User Password
email	The Email Address of User, you can send multiple email addresses by using "email[]" as the key
userorganizationid	The User Organization ID
salutation	The User Salutation, available options are: Mr., Ms., Mrs., Dr.
designation	The User Designation/Title
phone	The Phone Number
isenabled	Toggle whether the user is to be enabled/disabled
userrole	The User Role, available options are: user, manager. Default: user

### Response

```
<users>
<user>
<id>1</id>
<usergroupid>2</usergroupid>
<userrole>manager</userrole>
<userorganizationid>1</userorganizationid>
<salutation>Mr.</salutation>
<userexpiry>0</userexpiry>
<fullname>John Doe</fullname>
<email>john.doe@gfi.com</email>
<email>john@kayako.com</email>
<designation>CEO</designation>
<phone>123456789</phone>
<dateline>1296540309</dateline>
<lastvisit>0</lastvisit>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>0</enabledst>
<slaplanid>0</slaplanid>
<slaplanexpiry>0</slaplanexpiry>
</user>
</users>
```

DELETE /Base/User/\$id\$

Delete the user identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the user

### REST-TicketTimeTrack

This topic provides details about the REST - TicketTimeTrack API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Tickets/TicketTimeTrack/ListAll/\$ticketid\$

Retrieve a list of a ticket's time track notes.

#### Note:

API supported in version v4.01.220 and later.

### Arguments

Name	Description
\$ticketid\$	The unique numeric identifier of the ticket

### Response

```
<timetracks>
<timetrack id="1" ticketid="1" timeworked="600" timebillable="1200"billdate="1306393740"
workdate="1306393740" workerstaffid="1"workerstaffname="Varun Shoor" creatorstaffid="1"
creatorstaffname="VarunShoor" notecolor="1">Time track comment goes here</timetrack>
<timetrack id="2" ticketid="1" timeworked="600" timebillable="1200"billdate="1306393740"
workdate="1306393740" workerstaffid="1"workerstaffname="Varun Shoor" creatorstaffid="1"
creatorstaffname="VarunShoor" notecolor="1">Time track comment number two goes here</timetrack>
</timetracks>
```

GET /Tickets/TicketTimeTrack/{ticketid}/{id}

Retrieve the time tracking note identified by `{id}` that belongs to a ticket identified by `{ticketid}`.

**Note:**

API supported in version v4.01.220 and later.

**Arguments**

Name	Description
<code>{ticketid}</code>	The unique numeric identifier of the ticket
<code>{id}</code>	The unique numeric identifier of the ticket time tracking note

**Response**

```
<timetracks>
<timetrack id="1" ticketid="1" timeworked="600" timebillable="1200"billdate="1306393740"
workdate="1306393740" workerstaffid="1"workerstaffname="Varun Shoor" creatorstaffid="1"
creatorstaffname="VarunShoor" notecolor="1">Time track comment goes here</timetrack>
</timetracks>
```

POST /Tickets/TicketTimeTrack

Add a new time tracking note to a ticket.

**Note:**

API supported in version > v4.01.220

**Arguments (POST variables)**

Name	Description
<code>ticketid</code>	The unique numeric identifier of the ticket
<code>contents</code>	The ticket time tracking note contents
<code>staffid</code>	The ticket time tracking creator staff identifier
<code>worktimeline</code>	The UNIX timestamp which specifies when the work was executed
<code>billtimeline</code>	The UNIX timestamp which specifies when to bill the use
<code>timespent</code>	The time spent (in seconds)

Name	Description
timebillable	The time billable (in seconds)
workerstaffid	The staff identifier of the worker. If not specified, the staff user creating this entry is considered as the worker
notecolor	The Note Color

## Response

```
<timetracks>
<timetrack id="1" ticketid="1" timeworked="600" timebillable="1200"billdate="1306393740"
workdate="1306393740" workerstaffid="1"workerstaffname="Varun Shoor" creatorstaffid="1"
creatorstaffname="VarunShoor" notecolor="1">Time track comment goes here</timetrack>
</timetracks>
```

DELETE /Tickets/TicketTimeTrack/{ticketid}/{id}

Delete the ticket time tracking note identified by {id} linked to the {ticketid}.

### Note:

API supported in version > v4.01.220

## Arguments

Name	Description
{ticketid}	The unique numeric identifier of the ticket
{id}	The unique numeric identifier of the ticket time tracking note

## REST-Staff

This topic provides details about the REST - Staff API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Base/Staff

Retrieve a list of all staff users in the help desk.

## Response

```
<staffusers>
<staff>
<id>1</id>
<staffgroupid>1</staffgroupid>
<firstname>John</firstname>
<lastname>Doe</lastname>
<fullname>John Doe</fullname>
<username>admin</username>
<email>john.doe@kayako.com</email>
<designation>CEO</designation>
<greeting>Hello, How may I help you?</greeting>
<mobilenumber>123456</mobilenumber>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>1</enabledst>
<signature>John Doe (+1 909 23232344)</signature>
</staff>
</staffusers>
```

GET /Base/Staff/\$id\$

Retrieve a staff identified by \$id\$.

### Arguments

Name	Description
\$id\$	The numeric identifier of the staff

### Response

```

<staffusers>
<staff>
<id>1</id>
<staffgroupid>1</staffgroupid>
<firstname>John</firstname>
<lastname>Doe</lastname>
<fullname>John Doe</fullname>
<username>admin</username>
<email>john.doe@kayako.com</email>
<designation>CEO</designation>
<greeting>Hello, How may I help you?</greeting>
<mobilenumber>123456</mobilenumber>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>1</enabledst>
<signature>John Doe (+1 909 23232344)</signature>
</staff>
</staffusers>

```

PUT /Base/Staff/\$id\$

Update the staff account identified by \$id\$.

### Arguments

Name	Description
firstname	The first name
lastname	The last name
username	The login username
password	Is only updated if it is specified with the request
staffgroupid	The staff group ID
email	The staff email address
designation	The Designation/Title of Staff
mobilenumber	The mobile number of Staff user
staffsignature	The Signature to append to each reply made by staff
isenabled	Toggle the enabled/disabled property using this flag
greeting	The default greeting message when the staff accepts a live chat request
timezone	The default time zone for Staff
enabledst	Toggle the enabling/disabling of automatic DST calculation

### Response

```

<staffusers>
<staff>
<id>1</id>
<staffgroupid>1</staffgroupid>
<firstname>John</firstname>
<lastname>Doe</lastname>
<fullname>John Doe</fullname>
<username>admin</username>
<email>john.doe@kayako.com</email>
<designation>CEO</designation>
<greeting>Hello, How may I help you?</greeting>
<mobilenumber>123456</mobilenumber>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>1</enabledst>
<signature>John Doe (+1 909 23232344)</signature>
</staff>
</staffusers>

```

POST /Base/Staff

Create a new Staff account.

### Arguments

Name	Description
firstname	The first name
lastname	The last name
username	The login username
password	The staff password
staffgroupid	The staff group ID
email	The staff email address
designation	The Designation/Title of Staff
mobilenumber	The mobile number of Staff user
staffsignature	The Signature to append to each reply made by staff
isenabled	Toggle the enabled/disabled property using this flag
greeting	The default greeting message when the staff accepts a live chat request
timezone	The default time zone for Staff
enabledst	Toggle the enabling/disabling of automatic DST calculation

### Response

```

<staffusers>
<staff>
<id>1</id>
<staffgroupid>1</staffgroupid>
<firstname>John</firstname>
<lastname>Doe</lastname>
<fullname>John Doe</fullname>
<username>admin</username>
<email>john.doe@kayako.com</email>
<designation>CEO</designation>
<greeting>Hello, How may I help you?</greeting>
<mobilenumber>123456</mobilenumber>
<isenabled>1</isenabled>
<timezone>GMT</timezone>
<enabledst>1</enabledst>
<signature>John Doe (+1 909 23232344)</signature>
</staff>
</staffusers>

```

DELETE /Base/Staff/\$id\$

Delete the staff identified by \$id\$.

### Arguments

Name	Description
\$id\$	The numeric identifier of the staff

### REST-NewsComment

This topic provides details about the REST - NewsComment API call that GFI HelpDesk uses, including its field types, arguments, and responses.

### Comment Creator Types

Creator type	Value
Staff	1
User	2

### Comment Statuses

Comment status	Value
Pending for approval	1
Approved	2
Marked as spam	

GET /News/Comment/ListAll/\$newsitemid\$

Retrieve a list of all the comments that belong to a given news item ID.

## Arguments

Name	Description
\$newsitemid\$	The unique numeric identifier of the news item

## Response

```
<newsitemcomments>
<newsitemcomment>
<id><![CDATA[320]]]><![CDATA[></id>
<newsitemid><![CDATA[41]]]><![CDATA[></newsitemid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<fullname><![CDATA[Jon doe]]]><![CDATA[></fullname>
</email><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1340037804]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>

<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus>
<useragent />
<referrer />

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/News/NewsItem/View/41]]]><![CDATA
[></parenturl>
<contents><![CDATA[Created by API onnews]]]><![CDATA[></contents>
</newsitemcomment>
<newsitemcomment><id><![CDATA[321]]]><![CDATA[></id>
<newsitemid><![CDATA[41]]]><![CDATA[></newsitemid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<fullname><![CDATA[Simaranjit Singh]]]><![CDATA[></fullname>
</email><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1340037801]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus>
<useragent />
<referrer />

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/News/NewsItem/View/41]]]><![CDATA
[></parenturl>
<contents><![CDATA[Created by API onnews]]]><![CDATA[></contents>
</newsitemcomment>
</newsitemcomments>
```

GET /News/Comment/\$id\$

Retrieve a comment identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier

### Response

```
<newsitemcomments>
<newsitemcomment>
<id><![CDATA[320]]]><![CDATA[></id>
<newsitemid><![CDATA[41]]]><![CDATA[></newsitemid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<fullname><![CDATA[Jon doe]]]><![CDATA[></fullname>
<email /><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1340037804]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus>
<useragent />
<referrer />

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/News/NewsItem/View/41]]]><![CDATA
[></parenturl>
<contents><![CDATA[Created by API onnews]]]><![CDATA[></contents>
</newsitemcomment>
</newsitemcomments>
```

POST /News/Comment

Create a new knowledgebase article comment.

### Arguments (POST variables)

Name	Description
newsitemid	The news item ID
contents	The comment contents
creatortype	The creator type. Possible values: » Staff: 1 » User: 2
creatorid	The creator (staff or user) ID. Needed when creator type is Staff, optional when creator type is User
fullname	The creator (user) full name. Needed when creator type is User and creator id (user id) is not provided
email	The creator email
parentcommentid	Parent comment ID (when replying to some comment)

### Response

```

<newsitemcomments>
<newsitemcomment>
<id><![CDATA[320]]]><![CDATA[></id>
<newsitemid><![CDATA[41]]]><![CDATA[></newsitemid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<fullName><![CDATA[Jon doe]]]><![CDATA[></fullName>
<email /><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1340037804]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus>
<useragent />
<referrer />

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/News/NewsItem/View/41]]]><![CDATA
[></parenturl>
<contents><![CDATA[Created by API onnews]]]><![CDATA[></contents>
</newsitemcomment>
</newsitemcomments>

```

DELETE /News/Comment/\$id\$

Delete a news comment identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the comment

### KnowledgebaseComment

This topic provides details about the REST - KnowledgebaseComment API call that GFI HelpDesk uses, including its field types, arguments, and responses.

### Comment Creator Types

Creator type	Value
Staff	1
User	2

## Comment Statuses

Comment status	Value
Pending for approval	1
Approved	2
Marked as spam	3

GET /Knowledgebase/Comment/ListAll/{kbarticleid}

Retrieve a list of all the comments that belong to a given knowledgebase article ID.

### Arguments

Name	Description
{kbarticleid}	The unique numeric identifier of the knowledgebase article

### Response

```

<kbarticlecomments>
<kbarticlecomment>
<id><![CDATA[17]]]><![CDATA[></id>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<fullName><![CDATA[Simaranjit Singh]]]><![CDATA[></fullName>
</email><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1339786410]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus></useragent>

<referrer><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1/0/a-z]]]><![
CDATA[></referrer>

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1]]]><![CDATA
[></parenturl>
<contents><![CDATA[Comment1]]]><![CDATA[></contents>
</kbarticlecomment><kbarticlecomment>
<id><![CDATA[19]]]><![CDATA[></id>
<kbarticleid><![CDATA[1]]]><![CDATA[></kbarticleid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[0]]]><![CDATA[></creatorid>
<fullName><![CDATA[John]]]><![CDATA[></fullName>
<email><![CDATA[john@domain.com]]]><![CDATA[></email>
<ipaddress><![CDATA[::1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1339787502]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus>
<useragent><![CDATA[Mozilla/5.0 (Windows NT 6.1; rv:13.0)Gecko/20100101 Firefox/13.0]]]><![CDATA
[></useragent>

<referrer><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1/0/a-z]]]><![
CDATA[></referrer>

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1]]]><![CDATA
[></parenturl>
<contents><![CDATA[Comment2]]]><![CDATA[></contents>
</kbarticlecomment>
</kbarticlecomments>

```

GET /Knowledgebase/Comment/\$id\$

Retrieve a comment identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the comment

## Response

```

<karticlecomments>
<karticlecomment>
<id><![CDATA[17]]]><![CDATA[></id>
<karticleid><![CDATA[1]]]><![CDATA[></karticleid>
<creatortype><![CDATA[2]]]><![CDATA[></creatortype>
<creatorid><![CDATA[1]]]><![CDATA[></creatorid>
<fullname><![CDATA[Simaranjit Singh]]]><![CDATA[></fullname>
<email /><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[></ipaddress>
<dateline><![CDATA[1339786410]]]><![CDATA[></dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[></parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[></commentstatus>
<useragent />

<referrer><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1/0/a-z]]]><![
CDATA[></referrer>

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1]]]><![CDATA
[></parenturl>
<contents><![CDATA[Comment1]]]><![CDATA[></contents>
</karticlecomment>
</karticlecomments>

```

## POST /Knowledgebase/Comment

Create a new knowledgebase article comment.

### Arguments (POST variables)

Name	Description
knowledgebasearticleid	The knowledgebase article ID
contents	The comment contents
creatortype	The creator type. Possible values: <ul style="list-style-type: none"> <li>» Staff: 1</li> <li>» User: 2</li> </ul>
creatorid	The creator (staff or user) ID. Needed when creator type is Staff, optional when creator type is User
fullname	The creator (user) full name. Needed when creator type is User and creator id (user id) is not provided
email	The creator email
parentcommentid	Parent comment ID (when replying to some comment)

## Response

```

<kbarticlecomments>
<kbarticlecomment>
<id><![CDATA[17]]]><![CDATA[>/id>
<kbarticleid><![CDATA[1]]]><![CDATA[>/kbarticleid>
<creatortype><![CDATA[2]]]><![CDATA[>/creatortype>
<creatorid><![CDATA[1]]]><![CDATA[>/creatorid>
<fullName><![CDATA[Simaranjit Singh]]]><![CDATA[>/fullName>
<email /><ipaddress><![CDATA[127.0.0.1]]]><![CDATA[>/ipaddress>
<dateline><![CDATA[1339786410]]]><![CDATA[>/dateline>
<parentcommentid><![CDATA[0]]]><![CDATA[>/parentcommentid>
<commentstatus><![CDATA[2]]]><![CDATA[>/commentstatus>
<useragent />

<referrer><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1/0/a-z]]]><![
CDATA[>/referrer>

<parenturl><![CDATA[http://localhost/fusiongit/trunk/index.php?/Knowledgebase/Article/View/1]]]><![CDATA
[>/parenturl>
<contents><![CDATA[Comment1]]]><![CDATA[>/contents>
</kbarticlecomment>
</kbarticlecomments>

```

DELETE /Knowledgebase/Comment/\$id\$

Delete a knowledgebase category identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the comment

### REST-KnowledgebaseAttachment

This topic provides details about the REST - KnowledgebaseAttachment API call that GFI HelpDesk uses, including its field types, arguments, and responses.

GET /Knowledgebase/Attachment/ListAll/\$kbarticleid\$

Retrieve a list of all the attachments that belong to a given knowledgebase article ID.

### Arguments

Name	Description
\$kbarticleid\$	The unique numeric identifier of the knowledgebase article

### Response

```

<kbattachments>
<kbattachment>
<id><![CDATA[4]]><![CDATA[></id>
<kbarticleid><![CDATA[1]]><![CDATA[></kbarticleid>
<filename><![CDATA[image.jpg]]><![CDATA[></filename>
<filesize><![CDATA[90543]]><![CDATA[></filesize>
<filetype><![CDATA[image/jpeg]]><![CDATA[></filetype>
<dateline><![CDATA[1335819066]]><![CDATA[></dateline>

<contents><![CDATA[iVBORw0KGgoAAAANSUhEUgAAABAAAAQCAYAAAF8/9hAAAABGdBTUEAAK==]]><![
CDATA[></contents>
</kbattachment>
<kbattachment>
<id><![CDATA[4]]><![CDATA[></id>
<kbarticleid><![CDATA[1]]><![CDATA[></kbarticleid>
<filename><![CDATA[image1.jpg]]><![CDATA[></filename>
<filesize><![CDATA[90549]]><![CDATA[></filesize>
<filetype><![CDATA[image/jpeg]]><![CDATA[></filetype>
<dateline><![CDATA[1335819066]]><![CDATA[></dateline>

<contents><![CDATA[iVBORw0KGgoAAAANSUhEUgAAABAAAAQCAYAAAF8/9hAAAABGdBTUEAAK==]]><![
CDATA[></contents>
</kbattachment>
</kbattachments>

```

GET /Knowledgebase/Attachment/\$kbarticleid/\$id\$

Retrieve an attachment identified by \$id\$.

### Arguments

Name	Description
\$kbarticleid\$	The unique numeric identifier of the knowledgebase article
\$id\$	The unique numeric identifier of the attachment

### Response

```

<kbattachments>
<kbattachment>
<id><![CDATA[4]]><![CDATA[></id>
<kbarticleid><![CDATA[1]]><![CDATA[></kbarticleid>
<filename><![CDATA[image.jpg]]><![CDATA[></filename>
<filesize><![CDATA[90543]]><![CDATA[></filesize>
<filetype><![CDATA[image/jpeg]]><![CDATA[></filetype>
<dateline><![CDATA[1335819066]]><![CDATA[></dateline>

<contents><![CDATA[iVBORw0KGgoAAAANSUhEUgAAABAAAAQCAYAAAF8/9hAAAABGdBTUEAAK==]]><![
CDATA[></contents>
</kbattachment>
</kbattachments>

```

## POST /Knowledgebase/Attachment

Create a new knowledgebase attachment.

### Arguments (POST variables)

Name	Description
<b>kbarticleid</b>	The knowledgebase article ID
<b>filename</b>	The uploaded file name
<b>contents</b>	TheBASE64 encodedattachment contents

### Response

```

<kbattachments>
<kbattachment>
<id><![CDATA[4]]><![CDATA[></id>
<kbarticleid><![CDATA[1]]><![CDATA[></kbarticleid>
<filename><![CDATA[image.jpg]]><![CDATA[></filename>
<filesize><![CDATA[90543]]><![CDATA[></filesize>
<filetype><![CDATA[image/jpeg]]><![CDATA[></filetype>
<dateline><![CDATA[1335819066]]><![CDATA[></dateline>

<contents><![CDATA[iVBORw0KGgoAAAANSUhEUgAAABAAAAQCAYAAAF8/9hAAAABGdBTUEAAK==]]><![
CDATA[></contents>
</kbattachment>
</kbattachments>

```

## DELETE /Knowledgebase/Attachment/ListAll/\$kbarticleid\$/id\$

Delete a knowledgebase attachment identified by \$id\$.

### Arguments

Name	Description
\$kbarcodeid\$	The unique numeric identifier of the article
\$id\$	The unique numeric identifier of the attachment

## REST-Department

This topic provides details about the REST - Department API call that GFI HelpDesk uses, including its field types, arguments, and responses.

### GET /Base/Department

Retrieve a list of all departments and sub-departments in the help desk.

#### Response

```
<departments>
<department>
<id>1</id>
<title>Support</title>
<type>private</type>
<app>tickets</app>
<displayorder>1</displayorder>
<parentdepartmentid>0</parentdepartmentid>
<uservisibilitycustom>1</uservisibilitycustom>
<usergroups><id>1</id><id>2</id><id>3</id></usergroups>
</department>
<department>
<id>2</id>
<title>Sales</title>
<type>public</type>
<app>livechat</app>
<displayorder>2</displayorder>
<parentdepartmentid>0</parentdepartmentid>
<uservisibilitycustom>0</uservisibilitycustom>
</department>
<department>
<id>3</id>
<title>GFI HelpDesk Fusion</title>
<type>public</type>
<app>livechat</app>
<displayorder>3</displayorder>
<parentdepartmentid>2</parentdepartmentid>
<uservisibilitycustom>0</uservisibilitycustom>
</department>
</departments>
```

### GET /Base/Department/\$id\$

Retrieve the department identified by its internal \$id\$.

## Arguments

Name	Description
\$id\$	The unique numeric identifier of the department to retrieve

## Response

```
<departments>
<department>
<id>1</id>
<title>Support</title>
<type>private</type>
<app>tickets</app>
<displayorder>1</displayorder>
<parentdepartmentid>0</parentdepartmentid>
<uservisibilitycustom>1</uservisibilitycustom>
<usergroups><id>1</id><id>2</id><id>3</id></usergroups>
</department>
</departments>
```

PUT /Base/Department/\$id\$

Update the department identified by \$id\$.

## Arguments

Name	Description
\$id\$	The unique numeric identifier of the department to update
title	The title of the department
type	The accessibility level of the department ('public' or 'private')
displayorder	A positive integer that the help desk uses to sort departments when displaying them (ascending)
parentdepartmentid	A positive integer of the parent department for this department
uservisibilitycustom	1 or 0 Boolean that controls whether or not to restrict the visibility of the department to particular user groups (seeusergroupid[])
usergroupid[]	An array of positive integers identifying the user groups to be assigned to this department

Posting an array using the query string for instance:

```
?usergroupid[]=2&usergroupid[]=3&usergroupid[]=X.
```

## Response

```
<departments>
<department>
<id>3</id>
<title>GFI HelpDesk Fusion</title>
<type>public</type>
<app>livechat</app>
<displayorder>3</displayorder>
<parentdepartmentid>2</parentdepartmentid>
<uservisibilitycustom>0</uservisibilitycustom>
</department>
</departments>
```

DELETE /Base/Department/\$id\$

Create a department.

### Arguments

Name	Description
title	The title of the department
app	The app of the department should be associated with ('tickets' or 'livechat')
type	The accessibility level of the department ('public' or 'private')
displayorder	A positive integer that the help desk uses to sort departments when displaying them (ascending)
parentdepartmentid	A positive integer of the parent department for this department
uservisibilitycustom	1 or 0 boolean that controls whether or not to restrict the visibility of this department to particular user groups (see usergroupid[])
usergroupid[]	An array of positive integers identifying the user groups to be assigned to this department

Posting an array using the query string like this:

```
?usergroupid[]=2&usergroupid[]=3&usergroupid[]=X
```

### Response

```

<departments>
<department>
<id>1</id>
<title>Support</title>
<type>private</type>
<app>tickets</app>
<displayorder>1</displayorder>
<parentdepartmentid>0</parentdepartmentid>
<uservisibilitycustom>1</uservisibilitycustom>
<usergroups><id>1</id><id>2</id><id>3</id></usergroups>
</department>
</departments>

```

DELETE /Base/Department/\$id\$

Delete the Department identified by \$id\$.

### Arguments

Name	Description
\$id\$	The unique numeric identifier of the department to delete

## 4.7.10 API Test Controller

For testing out your API, we recommend using [ReqBin](#), an easy to use online cURL client.

Your helpdesk comes with a controller called **Test** that lets you test your client against your helpdesk's API. The controller simply echo back the arguments passed to it, as well as the POST argument data. The path to the test controller is `/Core/TestAPI`.

The following functionality is supported by the test controller:

Action	Path	Arguments
GetList	GET /Core/TestAPI	(none)
Get	GET /Core/TestAPI/\$id\$	id: A numeric identifier of an item to retrieve
Post	POST /Core/TestAPI	(none)
Put	PUT /Core/TestAPI/\$id\$	id: A numeric identifier of an item to update
Delete	DELETE /Core/TestAPI/\$id\$	id: A numeric identifier of an item to delete

## 4.8 Live chat and calls

Working to set up calls or chat in GFI HelpDesk? These topics gets you up and running.

---

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---

## 4.8.1 Live Chat in GFI HelpDesk

Providing real-time support to your customers is a critical part of a good support strategy. The GFI HelpDesk's Live Chat features enable your team to provide fast and friendly help to your customers from your support center, as well as any website you choose.

Live chat in GFI HelpDesk has a variety of moving pieces. This article provides information on how those pieces interact and how you can get all of them working to provide a seamless live chat experience for your staff and customers.

There are two sides to GFI HelpDesk's live chat functionality:

- » **Staff-facing:** To receive and respond to customer chats, your staff or agents need two things:
  - » To belong to a **Live Support** department. If you need help creating a new department or assigning staff to a department, refer to the topic [Organizing Your Support Requests into Departments](#).
  - » To be running **Kayako Desktop**, our desktop application for handling customer chats. Learn all about Kayako Desktop in our installation guide and in our articles on how to use [Kayako Desktop for Windows](#) and [Kayako Desktop for Mac](#).
- » **Customer-facing:** To allow your customers to send your team live chat messages, enable the live chat button on your support center by ensuring that you have one or more agents signed in to the Kayako Desktop. You also have the option of adding a button to any external website from which you want to offer real-time support. You can choose from a variety of styles for your live chat buttons.



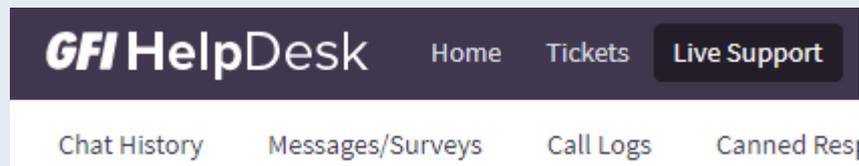
Once you set both sides up, your customers see a button like this, which they can click on to start a new chat with your support team.

When a customer clicks the live chat button, they are asked to fill in a form with their details, including their name, email, and what they are looking for help with.

You can also add custom fields to your chat form to capture additional information from customers before they start a chat. For further details, see [custom fields](#).

Once the customer submits their details, the chat request is sent to an available team member via Kayako Desktop. When the agent accepts the offer, they can talk to the customer directly and resolve their issue.

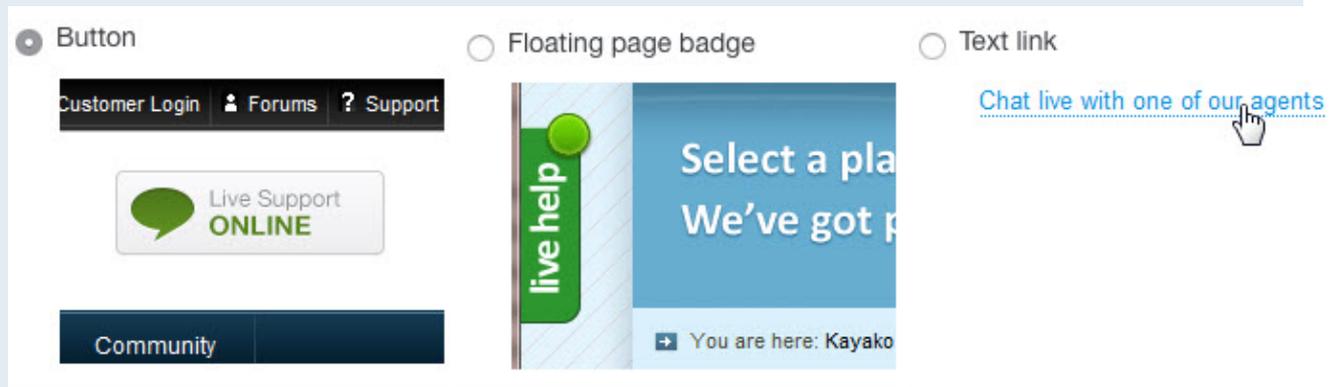
You can customize the header of your live chat window with your company logo by editing one of the live chat templates.



A complete record of the conversation is saved in the Chat History log, which you can reach via the staff control panel.

### Live chat button

For your support center, a live chat button is available by default. It switches to Online as soon as one or more of your agents install Kayako Desktop and sign in. You can remove or customize your support center button by editing your templates.



For other websites, the admin control panel includes an option to generate a customized block of code, which you can add to your site. You have the choice to [create the code](#) for a button, a badge, or a plain-text link.

## 4.8.2 Status of chats

This article discusses the different statuses available for chats.

GFI HelpDesk allows the following statuses for chats:

- » Incoming chat is the one which is waiting to be accepted by some agent.
- » In Chat means that the customer is currently in the chat with an agent.
- » Ended means that the chat has ended and the customer has already left.
- » No answer means that agents failed to answer the chat on round-robin queue.
- » Timeout is used for the open queue.

### NOTE:

GFI HelpDesk instance has two queueing modes for live chats that is, Round Robin and Open Queue. If an agent fails to answer the chat on Open Queueing mode, it uses the status Timed out. It is also used when there is no activity from either the user or agent during a chat.

## 4.8.3 Changing the default department in live chat window

By default, the department in the Live Chat window is sorted according to the `DepartmentID` value, which cannot be changed.

To override the default sort order, you need to change the `chatdepartmentlist` template content. This article provides the steps to change the `chatdepartmentlist` template content.

To change the `chatdepartmentlist` template, follow these steps:

1. Login to the Admin control panel and go to **Templates> Templates> Live support**.
2. In the **Live support template group**, select the `chatdepartmentlist` template.

Live support		Expand
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Insert Template</span> <span>Restore</span> </div>		
● chatbadge		Original
● chatcore		Original
● chatdepartmentlist		Modified
● chatfooter		Original

Screenshot 163: Select the chatdepartmentlist template

3. Replace the content of the template with text below:

```
<select name="departmentid" class="swiftselect" >
<foreach key=key item=_item from=$_departmentStatusContainer[online]>
<option <{if $_setDepartmentID == $_item[departmentid]}> </if> value='<{$_item[departmentid]}>'
class='deponline'><{$_item[displaytitle]}> - <{$_language[online]}></option>
</foreach>
<foreach key=key item=_item from=$_departmentStatusContainer[offline]>
<option <{if $_setDepartmentID == $_item[departmentid]}> </if> value='<{$_item[departmentid]}>'
class='depoffline'><{$_item[displaytitle]}> - <{$_language[offline]}></option>
</foreach>
</select>
```

4. Click **Save**.

Template: chatdepartmentlist (Default)
History

Back
Save
Save & Reload
Restore
Help

**Template editing best practices**

Using the template editor you can customize the look and feel of the support center. If a future Kayako update also includes changes to the same template, you will be asked to restore the template to the latest original version. This will undo your template changes and you will need to reapply them.

To minimize potential headaches, check out the template editing best practices guide before customizing your support center.

**Template status**

**Last modified**

**Template version number**

**Save a new template version**

**Describe your changes**

● Modified

21 February 2020 09:18 PM

1.00.11 (Current)

Yes  No

**TEMPLATE CONTENTS**

```
<select name="departmentid" class="swiftselect" >
<foreach key=key item=_item from=$_departmentStatusContainer[online]>
<option <{if $_setDepartmentID == $_item[departmentid]}> </if> value='<{$_item[departmentid]}>' class='deponline'><{$_item[displaytitle]}> - <{$_language[online]}></option>
</foreach>
<foreach key=key item=_item from=$_departmentStatusContainer[offline]>
<option <{if $_setDepartmentID == $_item[departmentid]}> </if> value='<{$_item[departmentid]}>' class='depoffline'><{$_item[displaytitle]}> - <{$_language[offline]}></option>
</foreach>
</select>
```

Screenshot 164: Saving the change

## 4.8.4 Advanced live chats

This sections has information about the advanced settings and configurations in livechats.

---

---

### Generating and adding a live chat button to website

You can add GFI HelpDesk live chat to any and as many of your company's websites as you like. The admin control panel allows you to customize and generate a block of code that you can then drop into your website's source code.

The topic details the process to generate and add a live chat button to a website.

#### Prerequisites

- » Administrator Account
- » Use the live support tag generator permission

#### Procedure

To generate and add a Live Chat button, follow the steps listed below:

1. Sign in to the admin control panel.
2. Click **Tag Generator** in the sidebar.
3. Leave the **Live Support Channel** dropdown set to 'Chat.'
4. From the **Tag Type** section, choose the style of live chat button you want to generate – button, badge, or a plain-text link.

#### Note:

The last tag type is for tracking visitors.

5. Click the **Next** button up top.
6. In the **Routing Options** section, you can choose particular departments or skills to route chats to, when they come in through this button.
7. Under **General Options**, you can enable SSL, choose which template group your live chat button belongs to, or turn the chat form on or off.
8. At the bottom of the form, you can use the **Insert Variable** and **Insert Staff Alert** buttons to pass information to GFI HelpDesk Desktop, when a staff member accepts a chat.
9. Before you generate your code block, switch to the **Customize** tab.
10. Here, you can customize the appearance of your button or badge.
11. When you've finished, click the **Generate Tag** button.
12. The next page displays the code block for your customized live chat button, as well as a preview of what the button or badge looks like
13. Select the entire code block and copy it.

14. Paste it into the source code of any page in your websites where you want live chat to appear.

**NOTE:**

Do not edit the code block directly. If you need to change the function or appearance of the live chat button, we recommend generating a new tag.

### Adding branded logos to live chat windows

If you are managing multiple brands in GFI HelpDesk, it is important that the proper logos appear in your customer chat windows. Since each brand and support site is managed by a different template group, you can personalize the logo for each of your support sites modifying that brand's templates.

#### Prerequisites

- » Make sure the logo files you want to use are uploaded somewhere easy to link to. It needs to be a public URL, for GFI HelpDesk to be able to use it.
- » Figure out which brands you want to modify, so you know which template groups to start with.
- » Follow the instructions to below to update your chat templates.

#### Branding your live chat logos

To customize your live chat logo to match your brand:

1. Log in to the Admin control panel.
2. Click **Templates** on the sidebar and then **Groups** on the sidebar.
3. Open the 'template group' which you want to edit, then click on **Templates**.
4. Here you can see a list of template categories. Click on **Live Support** to expand the list.
5. Finally, find the `chatheader` template and click to open it.
6. Now you want to find the spot in the code that specifies which logo to you. Press **Ctrl+F** to search the page and type in:

```
<{$_headerImageSC}>
```

7. That should take you down to the top of the body section.

```
<body class="chatbodymain" onload="(if $_inChat == true)>OnChatLoaded();<else>OnLoaded();</if>">  
  
  <div id="soundcontainer"></div>  
  <div id="main" class="chatview">  
    <div id="topbanner"><div class="topbannerchat"></div><div  
id="topbanneravatarcontainer"></div></div>  
    <div id="chattootbar">
```

Screenshot 165: Top of body section

8. Select the entire `<{$_headerImageSC}>` tag and delete it.
9. Copy the full URL for your logo image and paste it between the quotation marks after `src=`, where the header image code used to be.

**NOTE:**

Remember that the icon image, sized no larger 150px by 40px, needs to be hosted at a publicly available URL.

10. When you have made your changes, that line of code should look something like this:

```
<div id="topbanner"><div class="topbannerchat"> <img src-  
c="https://support.yourcompany.com/brandedlogo.png" alt="GFIHelpdesk <{$_productTitle}> Logo" id="logo" />
```

11. After making the change, click the **Save** button.

12. Repeat the steps above for the 'template groups' of any additional brands you support.

13. Finally, go ahead and refresh one of your branded support sites, open up a chat, and you should see your updated logo.

## Adding a Click-to-Call button to your site

Click-to-Call is a form of Web-based communication in which a person clicks a button, image or text to request an immediate connection with another person in real-time by phone call.

The feature of Click to Call is provided in the GFI HelpDesk Desktop application, using which incoming and outgoing calls can be made.

For using Click to Call, code can be generated from **Admin CP > Tag Generator > Click to Call** and can be placed at any page(s) of a website.

When the customers click on the icon, a window opens, where they need to mention their calling number. After clicking on "Call Me" automatically a call, and a chat request would be routed to the available phone operator in GFI HelpDesk Desktop application.

Make sure that your staff configure GFI HelpDesk Desktop application with your VoIP details, which can be done from:

### **GFI HelpDesk Desktop > File > Settings > Phone:**

- » VoIP server domain is required
- » Outbound Proxy is required by some services
- » VoIP server name (Host name or IP address) with username and password of the account

For more information on setting up the VoIP, see [Enabling VoIP/Phone support in Kayako Desktop](#).

**Note:**

Click to Call feature is not available with GFI HelpDesk Case. It is only available with GFI HelpDesk Fusion and GFI HelpDesk Engage.

## Handling chats with Kayako Desktop for Mac

**Kayako Desktop** provides you with a platform to interact with your site visitors and manage your support chats effectively. By connecting Kayako Desktop to your GFI HelpDesk domain, you can manage live chat requests that come in through the chat widget on your support site.

Kayako Desktop provides your support team an all-in-one tool for offering real-time support, including live chat, simultaneous conversations, visitor monitoring, support for multiple GFI HelpDesk instances, and much more.

Kayako Desktop comes in two flavors: one for Windows, one for Mac OS X. This topic is about Kayako Desktop for Mac (KDFM).

## NOTE:

For help with Kayako Desktop for Windows, see the topic [KDFW](#).

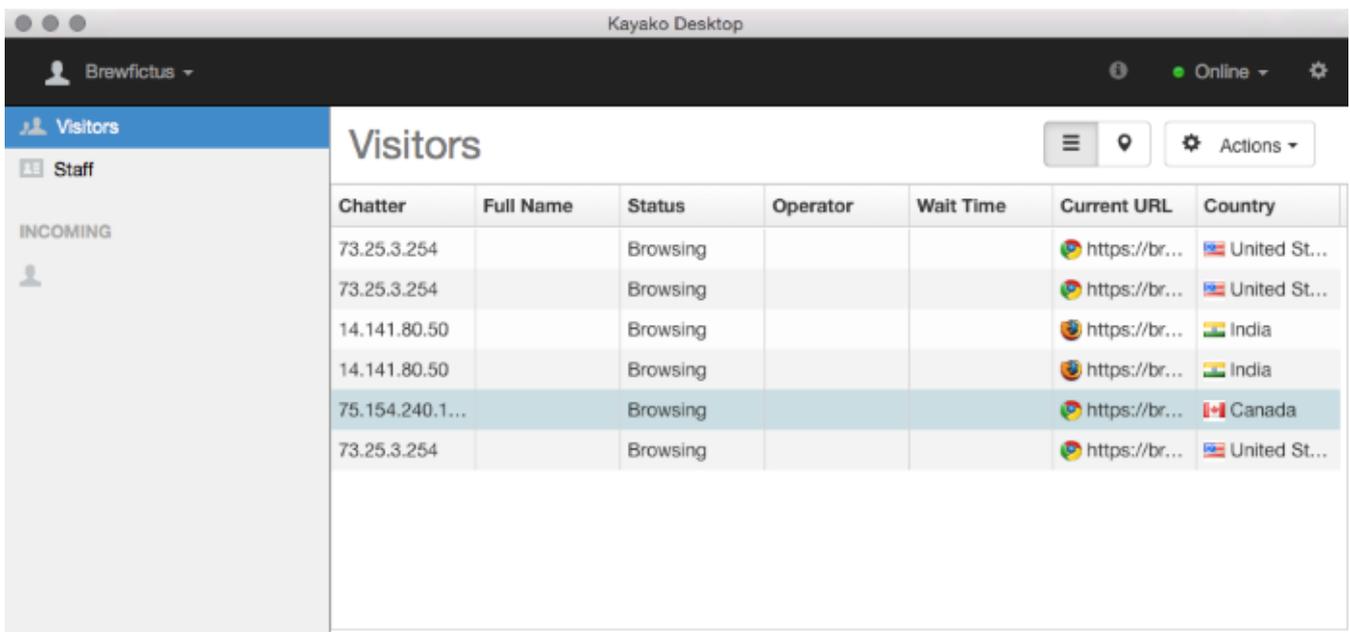
This topic provides an overview of how KDFM and GFI HelpDesk work together and then walk you through KDFM's capabilities step-by-step.

## Understanding how GFI HelpDesk and KDFM work together

Any agent that is going to be offering chat support needs to install **KDFM** and connect it to their GFI HelpDesk account. From there, they are ready to accept chat requests from your site visitors.

### KDFM stands for **Kayako Desktop for Mac**.

Anytime a new chat request comes in, KDFM sends your team a notification. Once an agent accepts the chat, they can interact with the customer directly. They also have the option to join ongoing chats or initiate chats proactively, from the visitor list in KDFM's main window:



The screenshot shows the Kayako Desktop application window. The title bar reads "Kayako Desktop". The user profile is "Brewfictus" and the status is "Online". The main area is titled "Visitors" and contains a table with the following data:

Chatter	Full Name	Status	Operator	Wait Time	Current URL	Country
73.25.3.254		Browsing			https://br...	United St...
73.25.3.254		Browsing			https://br...	United St...
14.141.80.50		Browsing			https://br...	India
14.141.80.50		Browsing			https://br...	India
75.154.240.1...		Browsing			https://br...	Canada
73.25.3.254		Browsing			https://br...	United St...

Screenshot 166: Kayako desktop on mac

Any chats that come in, whether an agent accepts them or not, appears in under **Live Support** in the staff control panel. Every message that goes back and forth is added to the chat history.

Now that you have a sense for how KDFM and **GFI HelpDesk** work together to let us look at some of the common tasks you can use KDFM for.

### Monitoring site visitors

To monitor visitors to your support site:

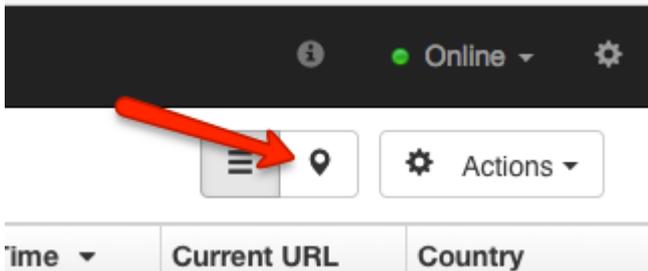
1. Log into **Kayako Desktop for Mac**.
2. The first screen you see is the **Visitors** screen. As soon as a new visitor arrives on your support site, you can see their IP address appear on a new row.
3. When a visitor has initiated a chat, their name appears in the **Full Name** column.

4. You can click the **Wait Time** column heading to sort visitors by how long they have been waiting for a response.

**NOTE:**

You can sort by any of the other column headers, as well.

5. For a different view of your site visitors, you can click the location icon to see each visitor's location plotted on a map.



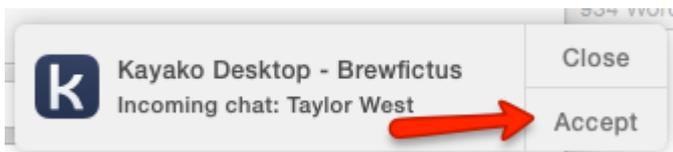
Screenshot 167: Click the location icon

6. Read on for instructions on how to initiate or accept chats with your visitors.

### Handling incoming chats from customers

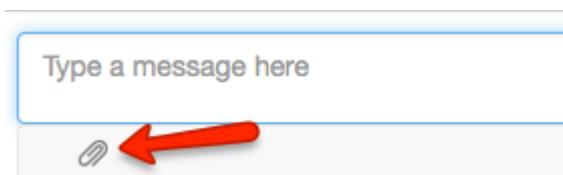
To pick up an incoming chat:

1. When a site visitor clicks the Live Support button on your support site, KDFM displays a notification.
2. Click the **Accept** button to accept and start chatting with the customer:



Screenshot 168: Click the accept button

3. If multiple customers have initiated chats, you can find them in the sidebar under the **Incoming** heading.
4. Click a **customer name** to open a chat window.
5. Click the **Accept** button to start chatting.
6. From within the chat window, enter your 'message' into the text area at the bottom and hit **Enter** to send it.
7. You can also share files with the customer by clicking the **paperclip icon** below the text area.



Screenshot 169: Click the paper clip icon

8. From the window that appears, find the file you want to share and click **Open**.
9. At any point, you can copy or save the chat transcript by clicking on the **Actions** dropdown in the upper-right.

**NOTE:**

Remember that the chat is also stored under 'Live Support' in the staff control panel.

10. When the customer leaves the chat, the conversation moves down under the **Archived Chats** heading in your sidebar.

### Initiating chats with customers

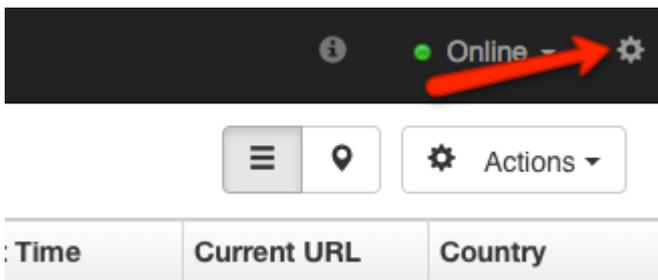
To initiate a chat with a site visitor:

1. In addition to accepting incoming chats, you can also proactively initiate a chat with any visitor on your site, from the Visitors screen.
2. Select the visitor you want to chat with by clicking on their name.
3. Click the **Actions** dropdown and select one of the following:
  - » **Engage inline** - Choose this option to pop up a full chat window on the page the visitor is currently viewing.
  - » **Engage alert** - Choose this option to display a pop-up that reminds the visitor that they can chat with your support team.
4. Once the visitor has accepted the chat, you can have a conversation with them as usual.

### Customizing your notifications settings

To change your notification settings:

1. From anywhere in KDFM, click the gear icon in the upper-right corner to open the **Preferences** screen.



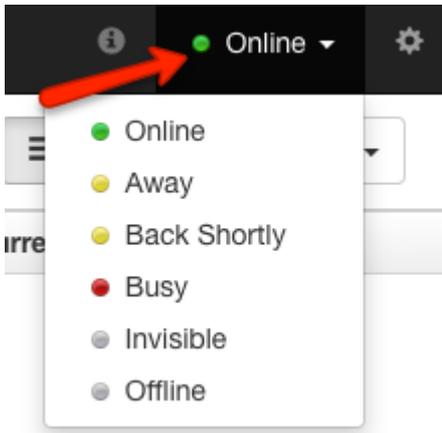
Screenshot 170: Click the gear icon

2. From the sidebar, click the **Notifications** menu item.
3. Here you can see a list of all of the notifications that KDFM can send.
4. To disable a particular notification, uncheck the **Enabled** box.
5. To change the notification sound for a particular event, click the [...] button.
6. Select the sound file you would like to use and click the **Open** button.
7. When you have made your changes, click the **Close** button to leave the Preferences screen.

### Changing your online status

To change your account's online status:

1. You can change your online status in two ways: manually or by adjusting the automatic settings.
2. To change your status manually, click the Online status dropdown from the toolbar:



Screenshot 171: Click the online status dropdown

3. Select a status from the list to change your status.
4. When you are ready to come back online, you have to come back to this list and select it manually.
5. To modify KDFM's automatic status changes, click the gear icon to open the **Preferences** screen.
6. From the sidebar, click the **Chat** menu item.
7. You can find two options here:
  - » **Auto Busy when I'm chatting with [#] visitors** - Enable this option if you want **KDFM** to set your status to 'Busy' automatically, whenever you are chatting with the specified number of customers.
  - » **Auto-Away when I'm idle for [#] minutes** - Enable this option if you want **KDFM** to set your status to 'Away' automatically, whenever you are not interacting with KDFM for more than the specified number of minutes.
8. When you have made your changes, click the **Close** button to leave the **Preferences** screen.

### Configuring other account settings

To modify your other account settings:

1. From anywhere in KDFM, click the gear icon in the upper-right corner to open the Preferences screen.
2. Click the **General** menu item.
3. On this screen, you can see several options:
  - » **Automatically launch Kayako Desktop at startup** - Enable this option to launch **KDFM** whenever you start your computer.
  - » **Automatically check for product updates** - Enable this option to have **KDFM** check for updates regularly.
  - » **Chat time interval, in seconds** - Edit the value of this field to control how frequently **KDFM** checks with the server for new chat data.
  - » **Data time interval, in seconds** - Edit the value of this field to control how frequently **KDFM** requests updated site visitor and support agent data from the server.
4. When you have made your changes, click the **Close** button to leave the **Preferences** screen.

### Enabling Live Chat on GFI HelpDesk

You might want to provide real-time support to your customers to increase satisfaction. The good news is, GFI HelpDesk's live chat feature enables your team to provide fast, friendly help to your customers from your support center, as well as any website you choose.

This topic provides details on how to enable Live Chat for your Support Center.

The quickest way to start offering real-time support is to have your team install GFI HelpDesk Desktop and get online. That automatically switches your support center's live chat button into the 'online' mode. For many customers, that is all you need. However, you do have the option to [customize the appearance](#) of your live chat button.

There are two versions for GFI HelpDesk Desktop, the Windows and the Mac version. Please click on the links below for instructions on how to install and configure each software.

- » [GFI HelpDesk Desktop for Windows \(KDFW\)](#)
- » [GFI HelpDesk Desktop for Mac OS \(KDFM\)](#)

#### Notes:

Your staff can receive and respond to customer chats if they belong to a Live Support department. If you need help creating a new department or assigning staff to a department, refer to the [Organizing your support requests into departments](#).

## Customizing the Live Chat button of your support center

When adding live chat to an external website, you can choose from a variety of live chat styles. At any point, you can also replace the standard live chat button on your support center with one of the other styles available.

This topic describes the process of customizing the Live Chat button of your support center.

### Prerequisites

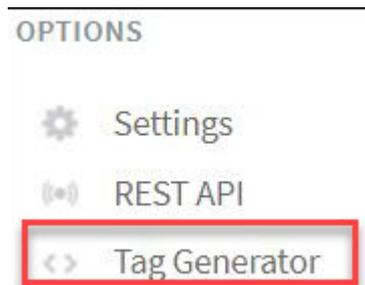
To customize the live chat button on your support center, you need an administrator account with permissions to:

- » Use the live support tag generator
- » Template groups
- » Templates

### Procedure

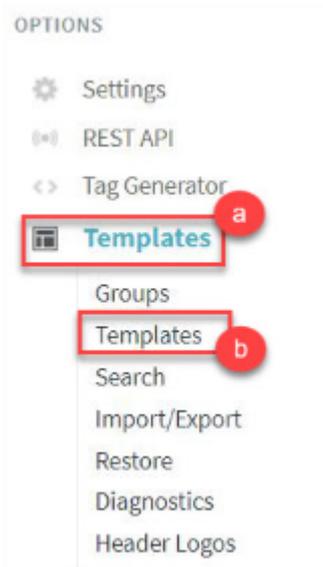
Follow the steps below to change the standard live chat button:

1. Log in to the admin control panel.
2. Generate your [desired customized code block](#) for a live chat button through the **Tag Generator**.



Screenshot 172: Tag generator

3. Once the code block has been generated, select the entire code block, copy it, and paste it in a text document.
4. From the **Templates** menu, select **Templates** in the sidebar.



Screenshot 173: Select templates

**Note:**

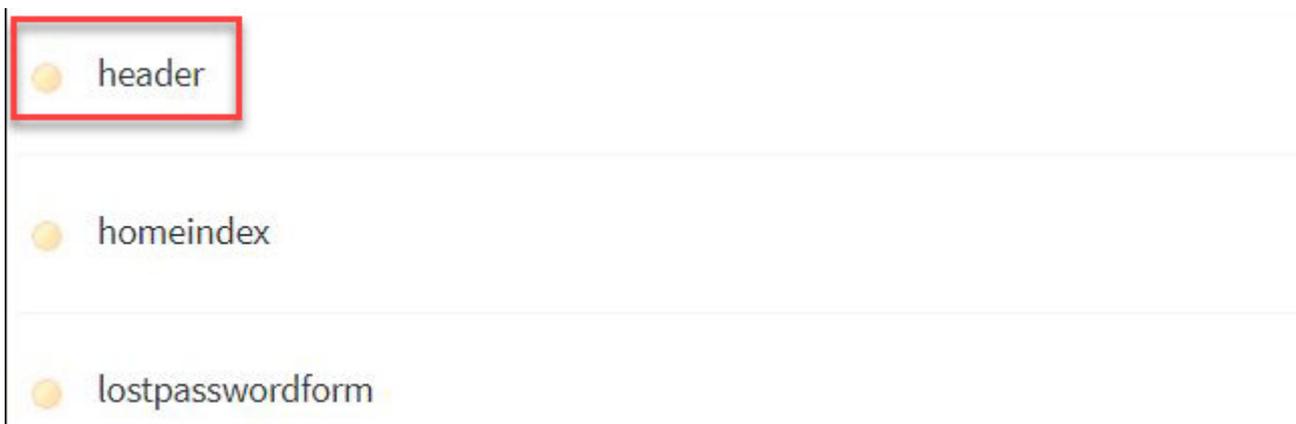
Before editing GFI HelpDesk templates, we recommend you to review [Template Editing Best Practices](#).

5. Click **General** from the template group to expand it.



Screenshot 174: Click general from the template group

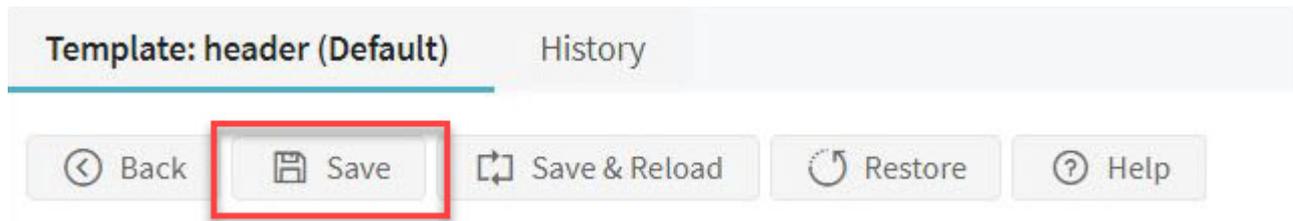
6. Scroll down and select the **header** template to open it for editing.



Screenshot 175: Open the header template for editing

7. Search the template for `<!-- BEGIN TAG CODE -->` and replace everything from that tag through the `<!-- END TAG CODE -->` with the live chat code block that you generated earlier.

8. Click **Save** to update the template.



Screenshot 176: Click Save

## Adding Live chat on WordPress GFI HelpDesk integration

This topic guides you on how to add Live Chat in the WordPress GFI HelpDesk page.

### Prerequisites

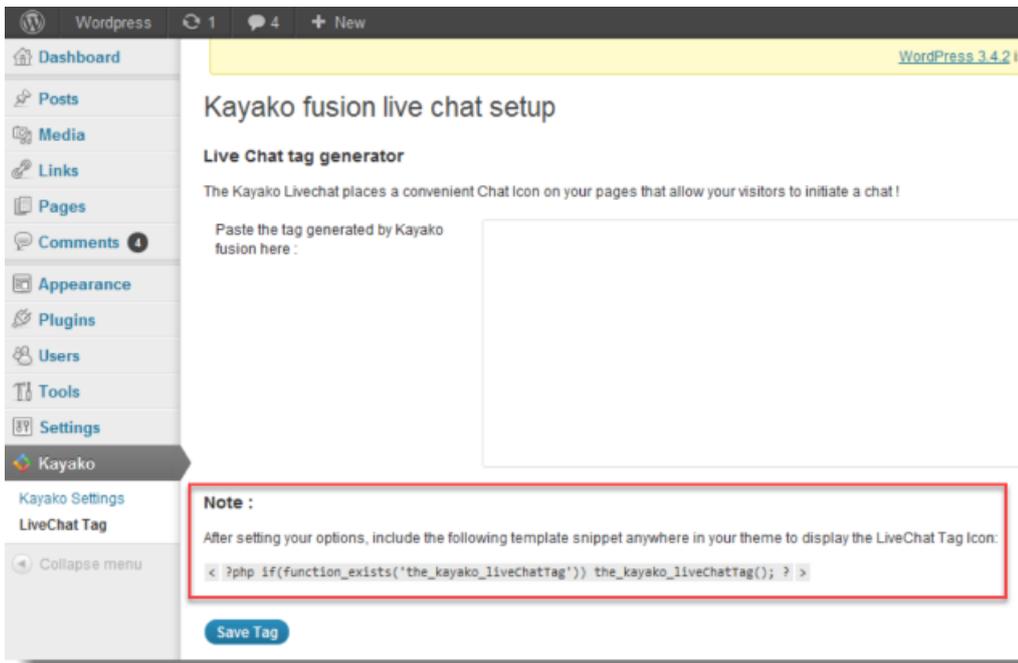
- » An active GFI HelpDesk subscription
- » Admin access to the Wordpress site
- » The GFI HelpDesk WordPress app available on the [Github page](#)

### Procedure

To offer Live Chat support from your WordPress site, you need to create a Live Chat tag to include on the page:

1. Log in as an admin to your **WordPress** site.
2. Go to the **GFI HelpDesk Admin Control Panel** and click Tag Generator on the menu sidebar.
3. Select the type of Live Chat tag you want, and follow the prompts for creating it.
4. Once you've generated the Live Chat tag, switch back to the **WordPress Admin > Kayako > Live Chat Tag**.
5. In the text box, labeled **Paste the tag generated by GFI HelpDesk Fusion here;**, paste the code for the Live Chat tag you created with GFI HelpDesk.
6. Before saving, copy the shorthand code below and add it in your WordPress Theme. This code should be present in your theme to display the chat icon.

```
<?php if(function_exists('the_kayako_liveChatTag')) the_kayako_liveChatTag(); ?>
```

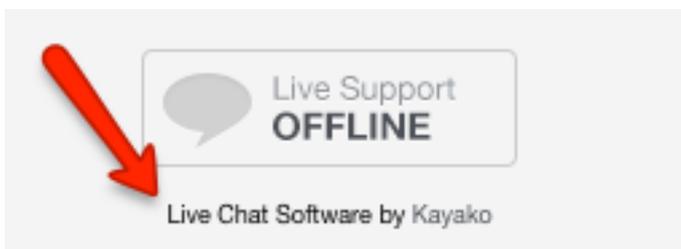


Screenshot 177: Add shorthand code in wordpress theme

The Live Chat icon should now be displayed in your WordPress GFI HelpDesk site.

### Removing the 'Live Chat Software by Kayako' text from the support site

By default, if you have a live chat link on your support site, there is a fine print beneath it that says '**Live Chat Software by Kayako**'.

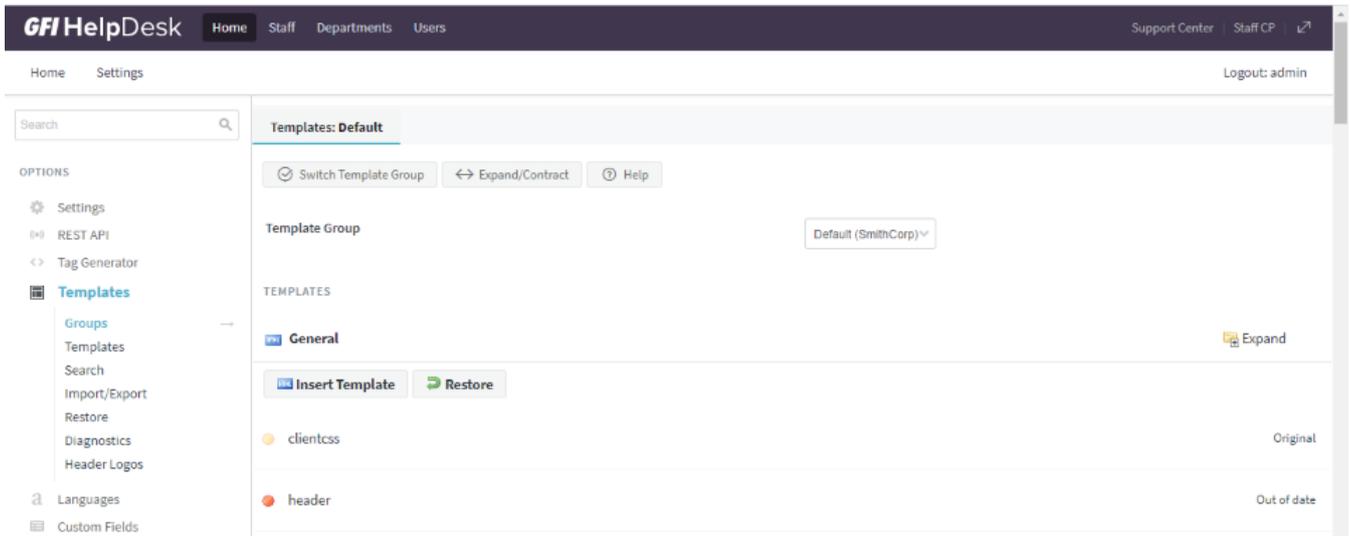


Screenshot 178: Fine print beneath the Live support button

If you're looking to remove the GFI HelpDesk branding from beneath your chat button, you can do so by removing the a little bit of code from the 'header' template. We'll walk you through that process below.

To remove the 'Live Chat Software by Kayako' text from your support site:

1. Log in to the admin control panel.
2. Click on **Templates** on the left navigation bar.
3. Click **Groups** then click on the template group you're going to work on.
4. In the '**Edit Template Group**' window that opens, click the Templates button.
5. Click **General** to expand the category and find 'header'.



Screenshot 179: Template header

6. In the **Template Contents** text area, scroll down to see the below code: (this code renders the fine print beneath the Live support button).

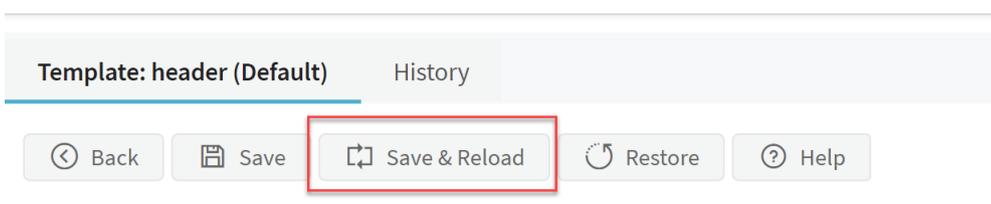
```
<span style="FONT-SIZE: 9px; FONT-FAMILY: 'segoe ui',helvetica neue', arial, helvetica, sans-serif;">
<a href="http://www.kayako.com/products/live-chat-software/" style="TEXT-DECORATION: none; COLOR: #000000"
target="_blank">Live Chat Software</a>
<span style="COLOR: #000000"> by </span>Kayako</span></div>
```



Screenshot 180: Template contents text area

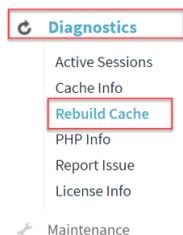
7. Select and delete this code.

8. Once you have removed the above code, click the **Save & Reload** button on top to save your changes.



Screenshot 181: Save and Reload

9. Next, you need to clear the cache.
10. Click on **Diagnostics** on the left navigation bar.
11. Click the **Rebuild Cache** link that appears underneath it.



Screenshot 182: Click Rebuild cache

12. Head back to your support center and do a hard refresh to see your changes.

## Enabling VoIP/Phone support in Kayako Desktop

VoIP/Phone feature is used for handling Inbound/Outbound calls in Kayako Desktop application.

For enabling VoIP/Phone feature in Kayako Desktop application, go to **Kayako Desktop > File > Settings > Phone > Enable VoIP phone** and fill up the below details :

- » **Link phone account with account:** select the staff account with which you wish to make and receive calls.
- » **Username:** Specify the username of your account that is provided by your VoIP provider.
- » **Auth Username:** Specify the username if your VoIP provider has provided any other authentication username for your account.
- » **Password:** Specify the password of your account that is provided by your VoIP provider.
- » **Domain:** Specify the hostname of your VoIP server – for example, "sip.kayako.com" – or IP address – for example, "10.10.10.1".
- » **Outbound Proxy:** it is required by some VoIP services, and it's usually the same server name as 'Domain'.

## Routing incoming messages when the Live Chat is offline

GFI HelpDesk has a feature called 'Message Routing' for creating tickets from offline messages when live chat is offline. The message routing feature allows the clients to leave offline messages via the live chat window when no staff user is available for chat.

This feature can be enabled from **Admin CP > Live Chat > Message Routing**.

The actions that can be performed on the offline messages coming from the help desk client interface are as follows:

- » **Log message in the live support messages area in the staff control panel:** The messages is also stored in Staff CP under **Live Support > Messages/Surveys**.
- » **Route to a new ticket:** Check this box and select the department to which the offline message should be routed as a ticket. The departments which are assigned to live chat module are only shown here.
- » **Route to specific email addresses:** Check this box if you want the offline messages to be forwarded to an email address or multiple email addresses. Multiple email addresses should be separated by a semi-colon (;).

## Handling chats with Kayako Desktop for windows

**Kayako Desktop** provides you with a platform to interact with your site visitors and manage your support chats effectively. By connecting **Kayako Desktop** to your GFI HelpDesk domain, you can manage live chat requests that come

in through the chat widget on your support site.

**Kayako Desktop** provides your support team an all-in-one tool for offering real-time support, including live chat, simultaneous conversations, visitor monitoring, support for multiple GFI HelpDesk instances, and much more.

Kayako Desktop comes in two flavors: one for Windows, one for Mac OS X. This topic is about Kayako Desktop for Windows (KDFW).

**NOTE:**

For help with Kayako Desktop for Mac, see [KDFM](#).

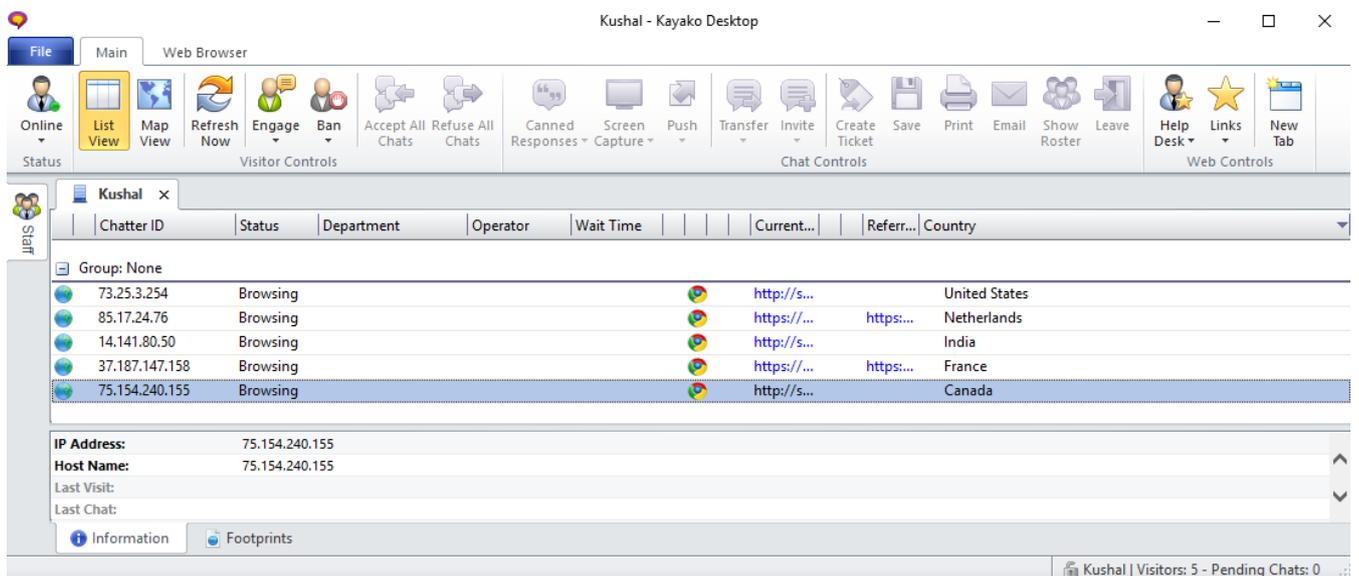
This topic provides an overview of how GFI HelpDesk interacts with KDFW and then walk you through how to accept and join chat conversations.

### Understanding how GFI HelpDesk and KDFW work together

Any agent that is offering chat support needs to install KDFW and connect it to their **GFI HelpDesk account**. From here they can accept chat requests from your site visitors.

**KDFW** stands for **Kayako Desktop for Windows**.

Anytime a new chat request comes in, **KDFW** sends your team a notification. Once an agent accepts the chat, they can interact with the customer directly. They also have the option to join ongoing chats or initiate chats proactively, from the visitor list in **KDFW**'s main window.



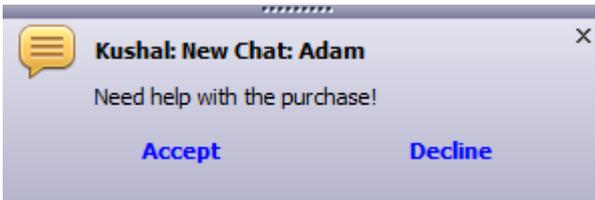
Screenshot 183: Kayako desktop for windows

Any chats that come in, whether an agent accepts them or not, appears in under **Live Support** in the staff control panel. Every message that goes back and forth is added to the chat history.

Now that you have a sense for how **KDFW** and GFI HelpDesk work together, let's look at some of the common tasks you'll be using **KDFW** for.

#### Accepting or rejecting a chat request

When a customer initiates a chat, one of your support agents who is online in KDFW receives a chat request pop-up:



Screenshot 184: Chat initiate alert

You can see the customer name (Adam) and chat subject in the pop-up.

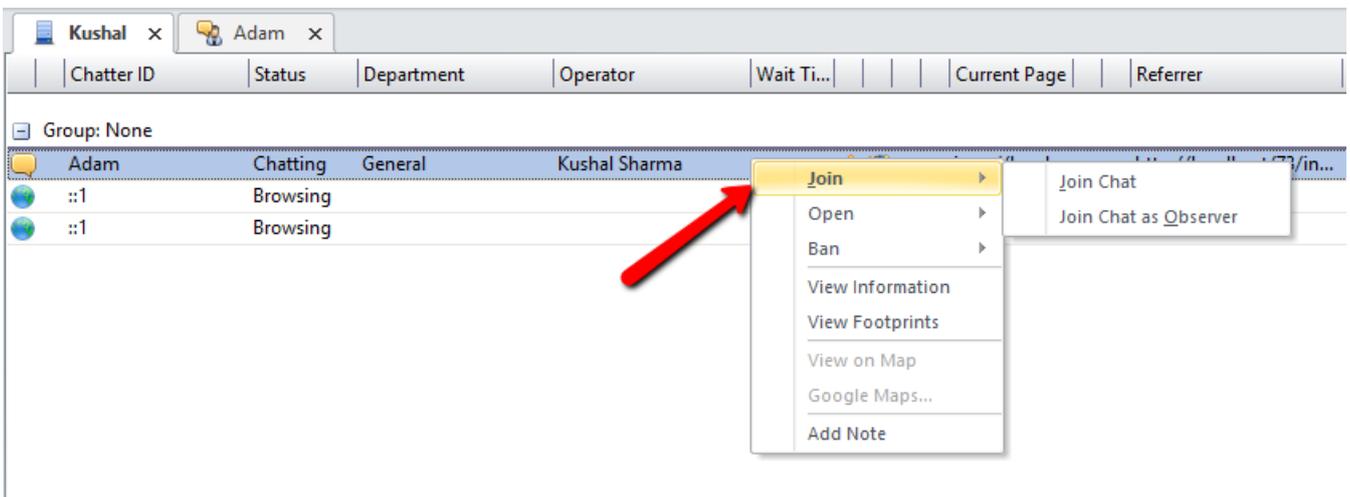
If you click Accept, you start a conversation with the customer. If you click Decline, chat request is routed to next available agent.

### Joining an ongoing chat

In addition to accepting new chat requests, you can also join ongoing chats from the main KDFW tab.

To join an ongoing chat:

1. Log into **Kayako Desktop for Windows**.
2. The first screen you see is the **Visitors** screen. Find the chat you want to join and right-click.
3. Hover over the Join option.



Screenshot 185: Hover over join option

4. From here, you have two options:

- » **Join chat** — Click this option to join the chat and be visible to both the other agent and the customer.
- » **Join chat as observer** — Click this option to join the chat as an observer, you cannot participate in the conversation and the only staff members are aware of your presence.

### Sending files from a chat window

If you are in a chat with the customer and want to share a file on the fly, you do not require any channel-switching. The KDFW lets you send many different types of media. When you share a file with your customer, it appears in their chat window, where they download it. Any files you send over KDFW are secured by the same measures that protect the rest of your GFI HelpDesk account.

Below are the different types of files you can send:

#### Sending an image

1. From your chat window, above the 'reply text box', click the **Send an image** button.

**NOTE:**

You can also send an image from the Push menu on the toolbar.

2. From the **Push image** window, you have two options:

- » **Upload an image from the local system**- Choose this option to upload an image file from your computer.
- » **Send an online image**- Choose this option to send an image to the customer using the URL for that image.

3. Add your image and click the **OK** button to send the image to your customer.

### Sending a file

1. From your chat window, above the 'reply text box', click the **Send a file** button.

**NOTE:**

You can also send a file from the Push menu on the toolbar.

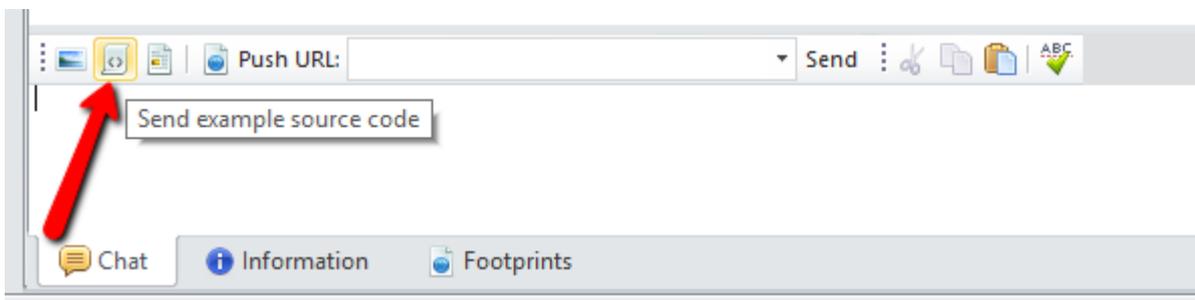
2. In the **Push file** window, click **Browse**.

3. Find the file you'd like to send and click **OK**.

4. Click the **OK** button again to send the file.

### Sending a code snippet

1. From your chat window, above the 'reply text box', click the **Send example source code** button.



Screenshot 186: Click the Send example source code button

**NOTE:**

You can also send a code snippet from the Push menu on the toolbar.

2. In the **Push code** window, paste the source code you would like to send.

3. From the **Language** drop-down, select the language respective to the source code you are sharing.

4. Click the **OK** button to send the code snippet.

The customer gets the shared code in the chat window which can be copied to use further easily.

### Sending a hyperlink

1. From your chat window, above the 'reply text box', you can see a **Push URL** text box.

**NOTE:**

You can also send a hyperlink from the Push menu on the toolbar.

2. Type or paste the **URL** you want to link your customer to.

3. Click the **Send** button to the right to send across a clickable hyperlink.

# 5 Troubleshooting

This topic explains how to resolve issues encountered while using GFI HelpDesk. These issues can be resolved using the contents of this guide. If any issues remain unresolved after reviewing the manual, check if your problem is listed below.

Topics in this section:

---

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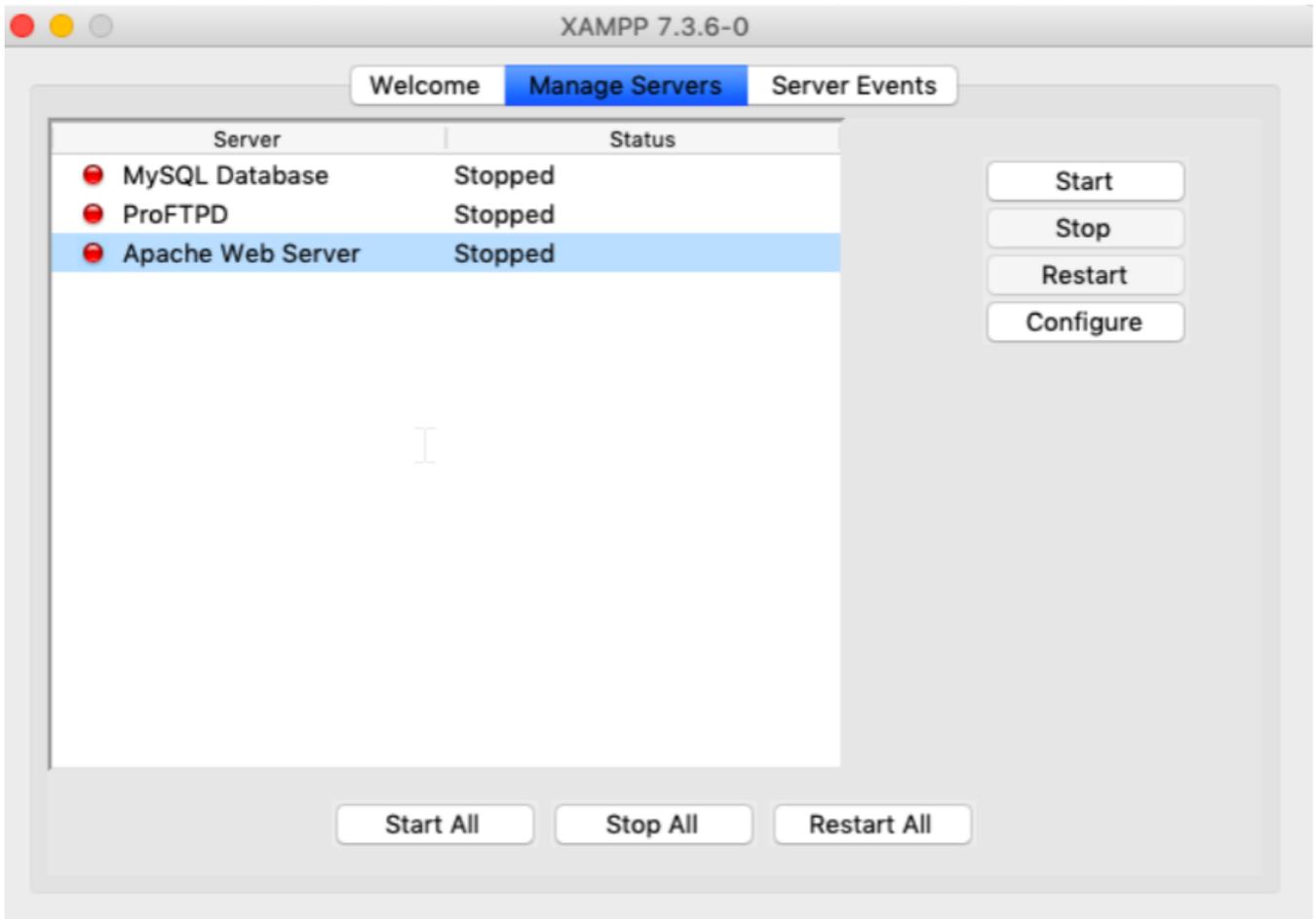
---

## 5.1 Unable to start XAMPP services on mac machine

This topic describes the procedure to fix the issues if XAMPP is unable to start properly in macOS and you get a blank page when trying to setup GFI HelpDesk.

All Services in XAMPP won't start after you successfully install GFI HelpDesk and restart the machine.

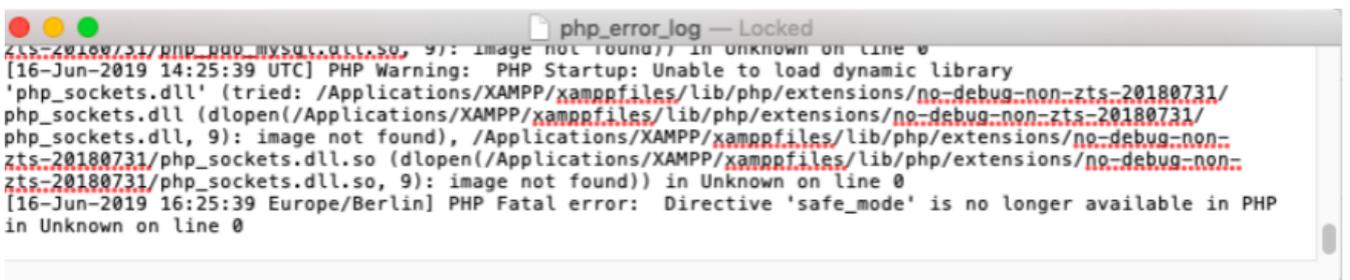
You managed to install XAMPP, had it working, successfully install GFI HelpDesk. The next time you switch on your MAC after shutdown or restart, all services in XAMPP does not start, even after pressing the **Start** or **Start All** button.



Screenshot 187: Manage servers

Below are the steps to start XAMPP services on mac:

1. Check PHP Error log, there is a Fatal Error related to Safe Mode.



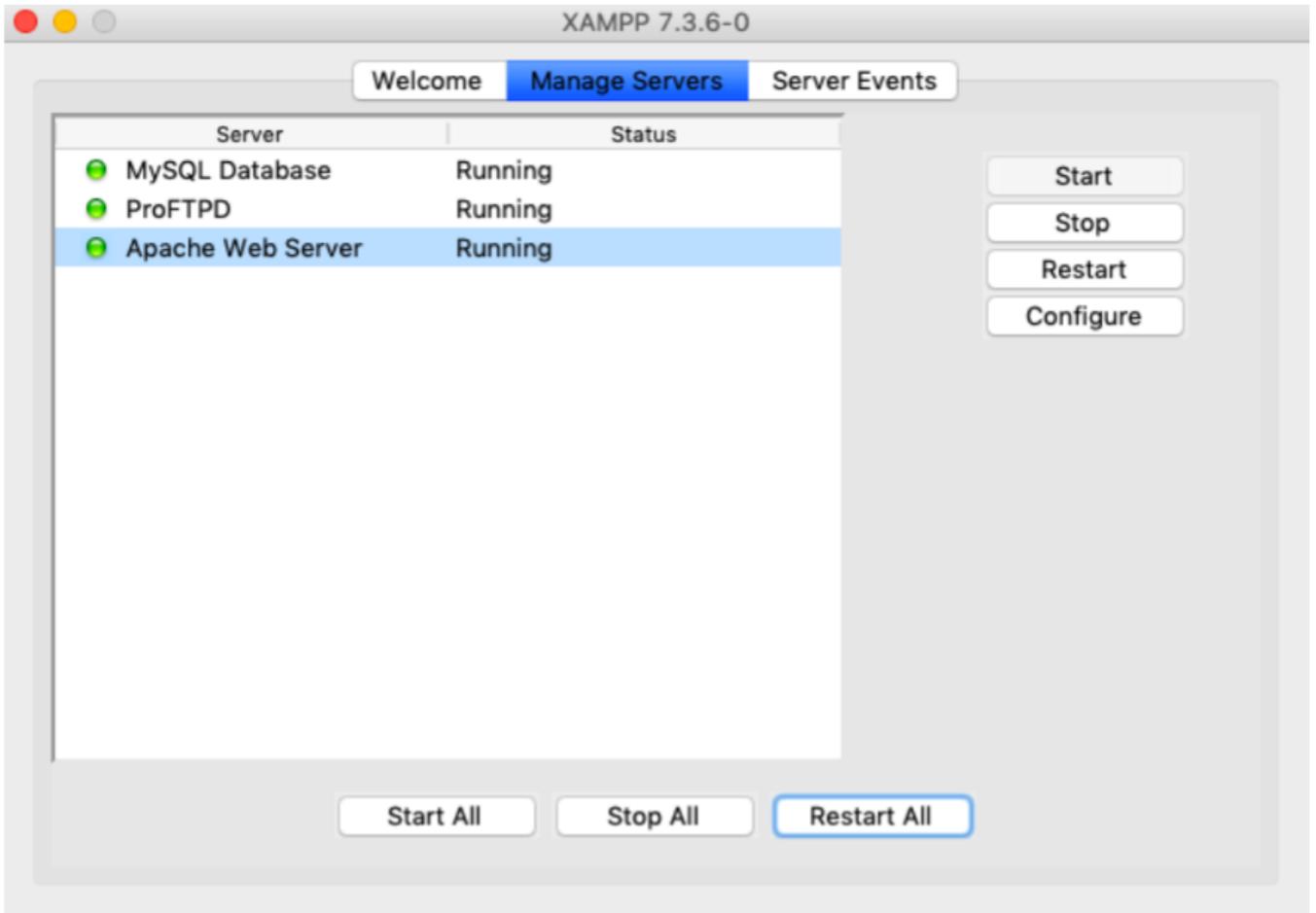
Screenshot 188: php error log

2. Checked PHP.ini and search for any entry related to Safe Mode.
3. Disable the safe\_mode by putting a semicolon in front of the text and save the file.



Screenshot 189: Disable safe mode

4. Go to XAMPP again and try to restart the services again.



Screenshot 190: Restart service from XAMPP

## 5.2 Error: 'Privacy Policy Required' when submitting tickets

The end-user encounters the following error message while submitting support tickets:

Privacy Policy Required

Users can experience this error with ticket submission because of out of date templates in GFI HelpDesk.

We have implemented General Data Protection Regulation (GDPR) related changes in the product and it requires out of date templates to be restored to get the updated template code.

For details on the process to restore the out of date templates, refer to [Managing Your Template Modifications](#).

## 5.3 Handling PHP deprecated function errors while on GFI HelpDesk

When accessing the user, staff, and admin pages on GFI HelpDesk, you might receive "Deprecated Function" errors from PHP.

As a constantly developing language, newer PHP versions include functions that become deprecated. These functions cease to exist or change the expected result of the function as further versions of PHP are released.

These changes can result in warnings and error messages when you update your version of PHP and run existing code. Using these deprecated functions results in the creation of warnings or errors.

Example: `Deprecated: Function mcrypt_get_iv_size() is deprecated in...`

This topic provides information on how to resolve this issue.

If you received errors regarding function deprecation, you have two options:

» Suppress the warnings by adding the following line to the `php.ini` file:

```
error_reporting = E_ALL & ~E_NOTICE & ~E_DEPRECATED
```

» Upgrade your PHP to a higher version. For information about PHP releases, please visit the [Unsupported Historical Releases](#) website.

For more information about how to edit the `php.ini` file, refer to the article [How Can I Edit the PHP.Ini File?](#)

## 5.4 Uncaught exception received when searching

When performing search in GFI HelpDesk, the following exception can be received sometimes:

```
Uncaught Exception AutoExecute Query: AutoExecute Query:
INSERT swsearchstores
(array
(
'sessionid' => 'gM7CPU9K09IWAIB1ydsF1d2d25e4faeaffe89849e1912350626bd7a1a147RKfwmO8TT6Dtt',
'storetype' => 5, 'dateline' => 1557820459, 'lastupdate' => 1557820459, 'staffid' => '112', 'userid' => false,
)
)
in /__swift/library/Database/class.SWIFT_Database.php:603
```

This is because MySQL Strict Mode is enabled by default and should be disabled to use GFI HelpDesk.

The recommended resolution for this is to [Disable MySQL Strict Mode at the server level](#).

Alternatively, you can disable MySQL Strict Mode at the session level.

### Note:

- » This configuration ensures that every time GFI HelpDesk wants to connect to the MySQL Database, Strict Mode is disabled at the session level.
- » The user must have the necessary permissions on the database to disable Strict Mode.

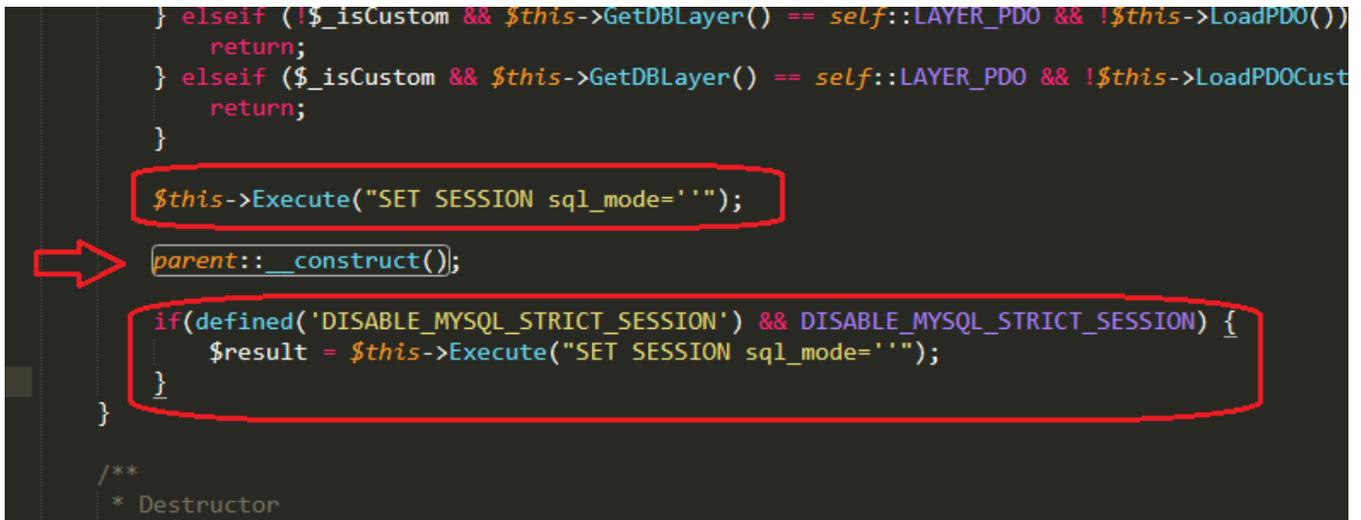
Follow the below steps to disable MySQL Strict Mode at the session level:

1. Launch a text editor.
2. Open the file: `__swift/library/Database/class.SWIFT_Database.php`
3. Find the method `__construct()`
4. At the end of that method, just before the line: `return parent::__construct();`, add the following line of code:

```
$this->Execute("SET SESSION sql_mode=''");
```

5. At the end of that method, just after the line: `return parent::__construct()`, add the following code:

```
if(defined('DISABLE_MYSQL_STRICT_SESSION') && DISABLE_MYSQL_STRICT_SESSION) {  
$result = $this->Execute("SET SESSION sql_mode='');  
}
```



```
} elseif (!$_isCustom && $this->GetDBLayer() == self::LAYER_PDO && !$this->LoadPDO())  
    return;  
} elseif ($_isCustom && $this->GetDBLayer() == self::LAYER_PDO && !$this->LoadPDOCust  
    return;  
}  
  
$this->Execute("SET SESSION sql_mode='');  
  
parent::__construct();  
  
if(defined('DISABLE_MYSQL_STRICT_SESSION') && DISABLE_MYSQL_STRICT_SESSION) {  
    $result = $this->Execute("SET SESSION sql_mode='');  
}  
  
/**  
 * Destructor
```

Screenshot 191: It should look like this in a code enabled text editor

6. Restart the MySQL services.

Perform the search action again to confirm the exception is no longer received.

## 5.5 Troubleshooting the message: "Your connection to this site is not secure"

Sometimes, when a user tries to access your instance, they may receive the message, "Your connection to this site is not secure." When this message appears, it could mean any of the following:

- » HTTPS is not enabled on your GFI HelpDesk URL
- » Your SSL Certificate is invalid or has expired

To ensure that information of users who visits your website is always safe, you need to enable HTTPS and install an SSL certificate for the domain.

### Troubleshooting Steps

#### A. Check if Your Instance is HTTPS Enabled

GFI HelpDesk instances are not HTTPS enabled by default. To check whether your base URL is HTTPS enabled or not:

1. Access your instance using a browser.
2. Right-click on the page and click View page source or press CTRL + U.
3. Search for baseName by using the Find function (CTRL + F).

If the baseName has HTTP (ex: `http://support.company.com`), this means that HTTPS is not yet enabled for your instance.

- » For GFI HelpDesk, your server admin would need to install the certificates for GFI HelpDesk on your server and change your GFI HelpDesk base URL to HTTPS.

For more information, check out the Adding or Updating Your SSL for Your GFI HelpDesk Download Instance section of the Adding or Updating SSL Certificates For Your Domain topic.

If the baseName has HTTPS (ex: HTTPS://help.GFI HelpDesk.com), then [check the validity of your SSL certificate](#).

## B. Check the Validity of Your SSL Certificate

Your GFI HelpDesk OnDemand instance is protected by a “wildcard” SSL certificate. This certificate covers our domain (www.gfi.com) and any sub-domains we have (www.[yourdomain].GFI HelpDesk.com).

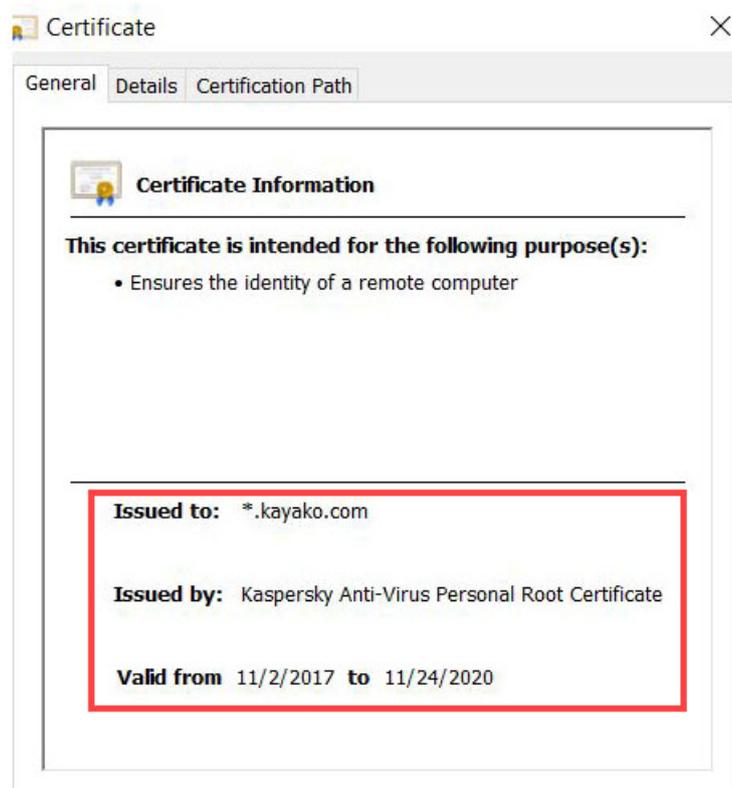
If you are using a custom domain and you have added a custom SSL certificate to your OnDemand instance, check if the certificate has expired. To check your certificate, you may use any available online SSL checker tool. Or, you may follow the steps below:

- a. Click the icon (padlock or info sign) before the URL in the address bar



Screenshot 192: Padlock

- b. Review the certificate's validity from the **General** tab.



Screenshot 193: Certificate information

To learn more about adding SSL certificates, refer to [Adding or Updating SSL Certificates For Your Domain](#).

## 5.6 Fixing common GFI HelpDesk errors

GFI HelpDesk has a built-in error handling system that displays messages when the system encounters them.

This article covers common errors that you may encounter when running GFI HelpDesk. Also, it describes possible root causes and solutions for these errors.

This topic covers the following error types:

## PHP fatal errors

The following table describes common PHP errors that our customers have run into, including an explanation of why they happen and what you can do to prevent them.

ERROR MESSAGE	CAUSE & SOLUTION
PHP Fatal error: Allowed memory size of ##### bytes exhausted (tried to allocate ## bytes) in /home/backofficetna/public_html /__swift/library/Database /class.SWIFT_Database.php on line 835	This error occurs when the process you are running is trying to use more memory than there is available. You have to increase the value of the <code>memory_limit</code> PHP parameter, which you can find in the <b>php.ini</b> file on the server. Once you have updated it and restarted your web server, the error should be resolved.
PHP Fatal error: Class 'DOMDocument' not found in /home/requestfor/public_html /__apps/tickets/models/Ticket /class.SWIFT_TicketPost.php on line 892	This error means that either the <b>DOM</b> module, the <b>XML</b> module, or both are missing from your GFI HelpDesk installation. Please make sure that you have installed <a href="#">all of the required PHP modules</a> .
PHP Fatal error: Class 'PDO' not found in/home/-conve46/public_html /support/__swift/library/Database /class.SWIFT_Database.php on line 379	This error indicates that the PDO module is missing from your server. Please make sure that you have installed all of the <a href="#">required PHP modules</a> .
PHP Fatal error: Call to a member function Get() on boolean in /home/mvp/public_html/support /__swift/models/Settings /class.SWIFT_Settings.php on line 53	This error occurs when GFI HelpDesk is unable to connect to your MySQL database. To resolve it, verify that the database details you have provided in the <code>__swift/config/config.php</code> file are correct.

## Uncaught exception errors

If GFI HelpDesk runs into a missing argument, an incomplete form submission, a wrong direct URL, or old cache files, this may cause an uncaught exception error. The following table covers the most common uncaught exception errors.

ERROR MESSAGE	CAUSE & SOLUTION
Uncaught exception: 'SwiftMailer_TransportException' with message 'Expected response code 220 but got code ""', with message "" in C:xampphtdocs__swiftthirdparty SwiftMailerclasses SwiftMailerTransport AbstractSmt-pTransport.php:386	You may encounter this error when the number of emails being sent from GFI HelpDesk exceeds the limit set by your SMTP server. You have two options to solve this error: <ul style="list-style-type: none"><li>» Increase the message limit.</li><li>» Whitelist your GFI HelpDesk IP address.</li></ul>
Uncaught exception: 'SWIFT_Exception' with message AutoExecute Query: UPDATE swsessions (array)) WHERE sessionid =	This error indicates that the <code>swsessions</code> table in your database is full. You need to clear the table, which logs out anyone currently logged in to your GFI HelpDesk instance. You can use the following query to clear it: <code>DELETE FROM `swsessions`;</code>
Uncaught Exception: Invalid Core Data: Department, Status, Priority, Type	This error occurs when GFI HelpDesk cannot find one of the expected values for core ticket fields (for example, Department, Status, Priority, or Type). This error may appear if one of the available values for any of these fields is deleted while still being linked in your template group. To fix the error, update all available template groups in the admin area under the Templates section.

ERROR MESSAGE	CAUSE & SOLUTION
<pre>Uncaught Exception: Error: Your PHP was not compiled with IMAP support.</pre>	<p>This error indicates that the IMAP module is missing from your server. Please make sure that you have installed all of the <a href="#">required PHP modules</a>.</p>
<pre>Uncaught Exception: Connection could not be established with host [php_network_getaddresses: getaddrinfo failed: Name or service not known #0] in ./__swift/thirdparty/SwiftMailer /classes/SwiftMailer /Transport/StreamBuffer.php:259</pre>	<p>This error occurs when GFI HelpDesk is unable to establish a connection with your SMTP server. Double-check that:</p> <ul style="list-style-type: none"> <li>» The DNS of the webserver is working properly.</li> <li>» The hostname of your SMTP server has been entered correctly.</li> </ul>
<pre>Expected response code 354 but got code "421", with message "421 4.7.0 Temporary System Problem."</pre>	<p>This error means that your SMTP server is under a heavy load and cannot send your message at the moment. If you are running into this issue, it often means that you are sending a lot of messages. To avoid this problem, we recommend setting up a local <b>MTA</b> (Mail Transfer Agent) so that your messages is in queue until the server can send them out. If you are running into this problem while using a <b>Google SMTP</b> server, you can upgrade to a paid Google Apps account, which gives your messages a higher priority.</p>
<pre>Uncaught Exception Invalid data provided in ./__swift/apps/base/models /Staff/class.SWIFT_Staff.php:522</pre>	<p>You may encounter this error if the LoginShare option is enabled for remote authentication. To resolve this error, make sure that all your staff users:</p> <ul style="list-style-type: none"> <li>» Have valid email addresses.</li> <li>» Belong to a staff group in your Active Directory.</li> </ul>
<pre>php_network_getaddresses: getaddrinfo failed: Temporary failure in name resolution</pre>	<p>This error occurs when GFI HelpDesk cannot resolve a valid IP address using your SMTP hostname. There are two things to check here:</p> <ul style="list-style-type: none"> <li>» Make sure your DNS server is working properly.</li> <li>» Verify your SMTP server details in the GFI HelpDesk admin control panel (Settings &gt; Email &gt; SMTP Settings).</li> </ul>
<pre>Passer log: Invalid data provided4</pre>	<p>This error appears if the sender's email belongs to a user account with no value in the <b>Full Name</b> field. To resolve this error, open the user's profile in the staff control panel under <b>Users</b> and enter their name in the <b>Full Name</b> field.</p>

ERROR MESSAGE	CAUSE & SOLUTION
Undefined index: csrfhash error on updating things	You may encounter this error if your GFI HelpDesk has a particularly large list of departments, user groups, or teams. Since loading the full list can consume a lot of system resources, the process may time out. To resolve this error, do the following: <ol style="list-style-type: none"> <li>1. In your PHP configuration file, find the parameter called <code>max_input_vars</code>.</li> <li>2. Change its value to 5000 and save the file.</li> <li>3. Restart the web service.</li> </ol>
UNSERIALIZE FAILED: a:1:{s:15:\ "templategroupid\n";s:1:"1\n";}	This error occurs when the <code>magic_quotes_gpc</code> parameter is enabled. You need to disable it to resolve this error. Open your PHP configuration file and set <code>magic_quotes_gpc</code> to <b>Off</b> .
Undefined index: dateline (./__apps/tickets/staff/class.View_Ticket.php:3318)	You may encounter this error if you have MySQL strict mode enabled on your server. Hence, you need to <a href="#">disable the MySQL strict mode</a> .
Notice Undefined index: _ticketContent (./__swift/cache/ 5923709124d225fdff b71bd2a3798fdc.php:68)	If you have any outdated or incorrect templates, they may cause this error. To resolve this error, <a href="#">restore your templates to their default versions</a> .

## Other common errors

The errors that are described in the following table can be caused by hardware problems, conflicts with the server environment, outdated releases, etc.

ERROR MESSAGE	CAUSE & SOLUTION
Failed to place call. Reason: Unknown error 420006.	This error occurs when GFI HelpDesk Desktop cannot find a sound card on your computer. We recommend checking that the drivers for your sound card are installed properly and making sure it is up and running.
Reason: Failed: Bad MD5 sum	You have this error if your server is trying to serve up GFI HelpDesk via its CDN (Content Delivery Network). Since there are elements of GFI HelpDesk that does not function properly if cached (, live chat), it causes this error. The solution here is to configure your CDN so that it never caches GFI HelpDesk.
ERROR: Product file version (4.xx.x) does not match with the database version (). Please run the upgrade script to ensure that the product is up to date.	This error indicates that your product files are out of sync with the version of GFI HelpDesk in your database. To fix it, <a href="#">upgrade</a> to the latest version of GFI HelpDesk.

ERROR MESSAGE	CAUSE & SOLUTION
Blank page with HTTP Error 500 Internal server error	This error means that PHP has crashed so quickly and thoroughly that it did not even have time to display an error message. This error may be caused by: <ul style="list-style-type: none"> <li>» A database connection issue.</li> <li>» The wrong file access permissions configured for an important folder.</li> </ul> You need to log in to your server and have a look at your error logs to find the reason for this error.
<pre>Error: AutoExecute Query: AutoExecute Query: INSERT swusers (array ( 'usergroupid' =&gt; '2', 'salutation' =&gt; 0, 'userrole' =&gt; 1, 'userorganizationid' =&gt; 0,...</pre>	You may encounter this error if you have MySQL strict mode enabled on your server. Hence, you need to <a href="#">disable the MySQL strict mode</a> .

## 5.7 Error when installing GFI HelpDesk on a different drive

You may want to install GFI HelpDesk to a different drive on your server. However, when running the application, it may attempt to look for the application files in the C:\ drive (default installation location). Changing GFI HelpDesk's installation location causes a caching issue.

Once a cache is built, GFI HelpDesk continues to use it for web requests and other tasks. If the cache has the wrong URL or path, it logs errors in GFI HelpDesk when trying to access the cached file. To avoid the caching issue, always clear the cache directory.

When a caching issue occurs, an error message similar to the one below may be encountered:

```
Warning!
require_once
(C:\WebSites\gfihelpdesk\Support\__swift\apps\base\library\UserInterface
/class.SWIFT_UserInterfaceToolbar.php):
failed to open stream: No such file or directory...
```

This topic provides more information on how to resolve the caching issue.

To ensure that your helpdesk's database does not have any outdated data that could interfere with your running applications, rebuild your cache. Follow the steps below to resolve the caching issue:

1. On your web server, go to the `__swift/cache/` directory and select all the files so you can delete every file in the folder (as in the GIF animation below).

### NOTE:

These are temporary files and are replaced as soon as you complete step 2.

Name	Date modified	Type	Size
<input type="checkbox"/> _apps	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> _swift	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> admin	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> api	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> console	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> cron	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> rss	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> setup_disabled	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> staff	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> staffapi	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> tests	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> vendor	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> visitor	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> winapp	10/25/2019 9:02 PM	File folder	
<input type="checkbox"/> build.json	10/25/2019 9:02 PM	JSON File	1 KB
<input type="checkbox"/> favicon	10/25/2019 9:02 PM	Icon	1 KB
<input checked="" type="checkbox"/> index	10/25/2019 9:02 PM	PHP File	1 KB
<input checked="" type="checkbox"/> key	1/20/2020 8:39 PM	PHP File	1 KB
<input checked="" type="checkbox"/> phpinfo	2/12/2020 3:47 PM	PHP File	1 KB
<input type="checkbox"/> robots	10/25/2019 9:02 PM	Text Document	1 KB

Screenshot 194: select all files to delete

2. In the GFI HelpDesk admin control panel, go to **Diagnostics > Rebuild Cache** from the sidebar.

Search 🔍

**Rebuild Cache**

**OPTIONS**

- ⚙️ Settings
- 🔗 REST API
- 🔗 Tag Generator
- 📄 Templates
- 🗺️ Languages
- 📄 Custom Fields
- 📍 GeoIP
- 🗣️ Live Support
- ✉️ Email Parser
- 🔑 Tickets
- 🔑 User Consents
- 🔄 Workflow
- ★ Ratings
- 🛡️ SLA
- 👤 Escalations
- ☰ Bayesian
- 📖 Knowledgebase
- 📰 News
- 🔧 Troubleshooter
- 📦 Widgets
- 📁 Apps
- 📄 Logs
- 📅 Scheduled Tasks
- 📄 Database
- 📁 Import
- 🔄 Diagnostics**
- Active Sessions
- Cache Info
- Rebuild Cache** →
- PHP Info
- Report Issue
- License Info

? Help

CACHE NAME
customfieldmanager
ticketmanager
ticketviewpropertymanager
usergroupsettings
usergroup
usergroupassign
notificationrule
widget
templategroup
staffsettings
staffassign
staffgroupassign
staffgroupsettings
staff
staffgrouplink
staffgroup
customfieldgrouppermission
comment
department
rating
language
languagephrase
settings
knowledgebasecategory
visitorban
chatskill
chat

Screenshot 195: Rebuild cache

After successfully completing the steps above, the error message should no longer appear. You should now be able to use your GFI HelpDesk helpdesk.

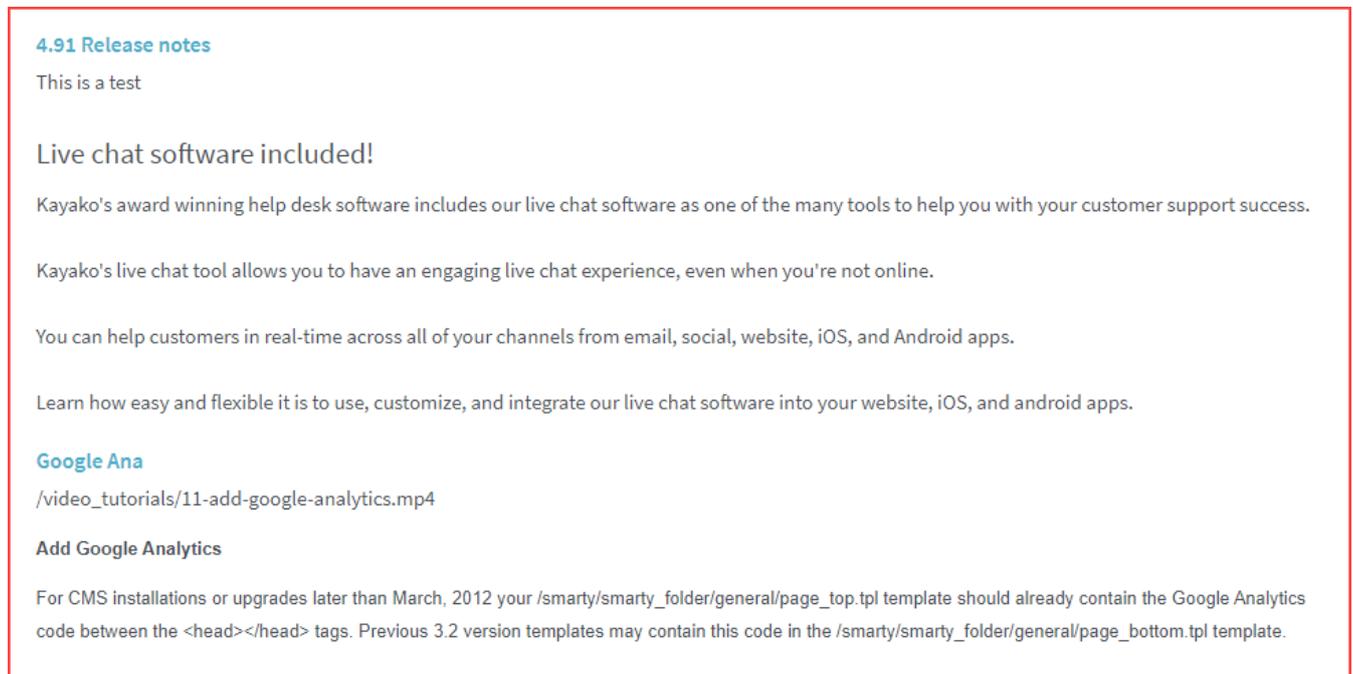
However, if the problem persists, contact GFI HelpDesk support Team for assistance.

## 5.8 Knowledgebase articles not displaying correctly after an upgrade

You might encounter an issue where the knowledgebase articles are not displaying correctly in the list view. This article provides information on how to resolve this issue.

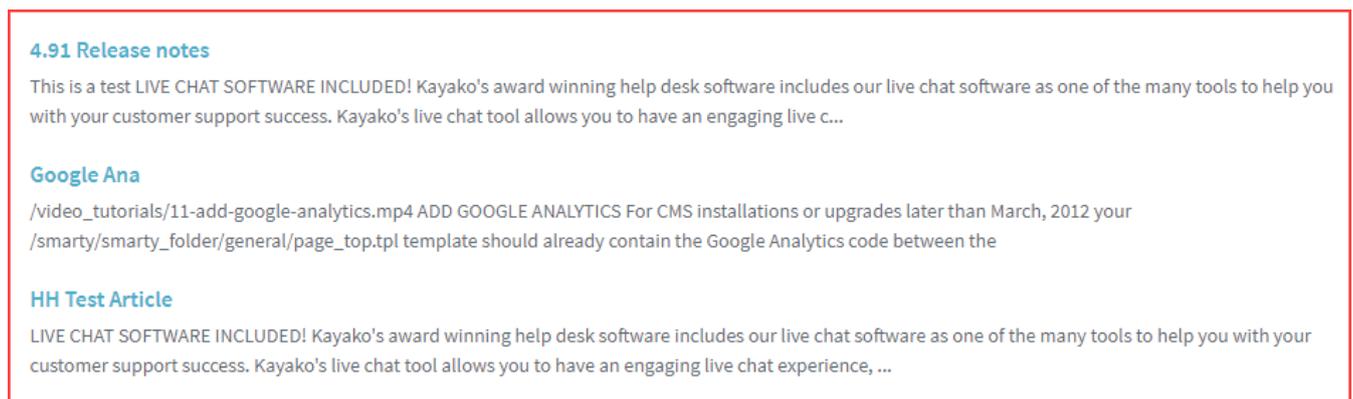
### Explanation of the error

**Current Behavior:** When you click on a category in your knowledgebase, articles are displayed in full like the examples shown in the image below.



Screenshot 196: Knowledgebase article not displaying correctly

**Expected Behavior:** Articles should only display with their title and short excerpt like the examples shown in the image below.



Screenshot 197: Correct display of knowledgebase article

### Diagnosis

This scenario usually occurs after an upgrade because custom changes you made in your templates should be restored after you upgrade your GFI HelpDesk.

Ideally, when you upgrade or reinstall your help desk, you need to back up and reinstall any template modifications you have made. Please visit the Managing Your Template Modifications article to learn more about this topic.

If you wish to upgrade or downgrade your GFI HelpDesk in the future, please refer to the topic on [Upgrading or downgrading your GFI HelpDesk](#).

## Resolution process

To fix the knowledgebase articles not displaying correctly after an upgrade, follow these steps:

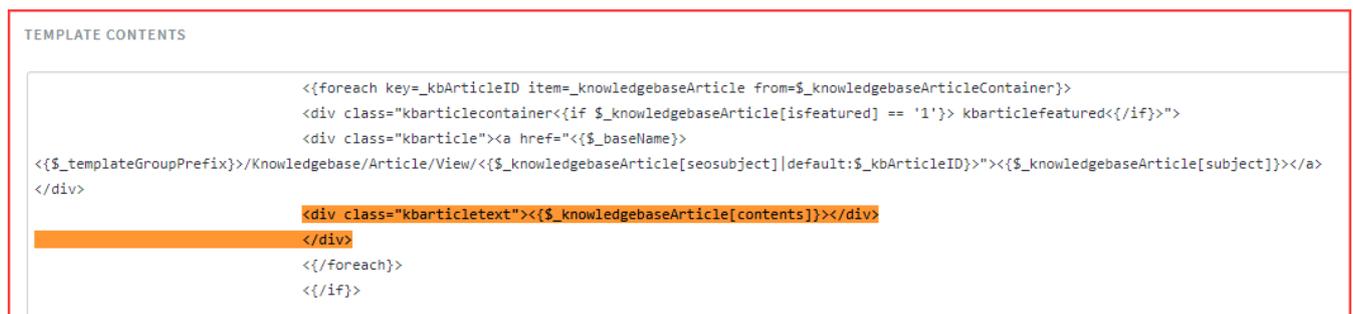
1. Login to the Admin Control Panel of your GFI HelpDesk instance.
2. In the Home tab, from **OPTIONS** panel navigate to **Templates > Templates**.
3. Click on **Knowledgebase** to expand it.
4. Click on **knowledgebaselist** to open the template content.
5. In the template content,

replace

```
<div class="kbarticletext"><{$_knowledgebaseArticle[contents]}></div>
```

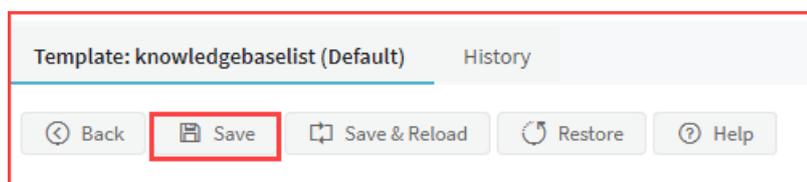
with

```
<div class="kbarticletext"><{$_knowledgebaseArticle[contentstext]}></div>
```



Screenshot 198: Template contents

6. Click **Save** at the top to save the changes.



Screenshot 199: Click save

## 5.9 Resolving memory exhaustion errors

This topic describes the error and its resolution, which appears when the large email(s) gets stuck into the mailbox associated with the email queue(s).

The help desk script tries to fetch the large email(s); however, due to memory\_limit size limitations, it is unable to fetch the emails leading to memory exhaustion.

To resolve the issue, increase the memory\_limit set in the *php.ini*.

The `.htaccess` or custom `php.ini` can also be used for this purpose, for example, you may edit the `.htaccess` as follows:

```
php_value memory_limit 256M
```

`.htaccess` directives apply only to the folder in which the `.htaccess` file resides, and all the folders inside. This means that you may edit the `.htaccess` file and only the particular site gets affected where the `.htaccess` file is residing. It does not affect the functioning of any other site on that server.

So, it allows you to set up a finely-grained tree of server directives, each subfolder inheriting properties from its parent.

The usage of `.htaccess` / custom `php.ini` depends upon the Server Configuration.

## 5.10 Resetting the administrator password without the helpdesk access

Resetting the administrator passwords may be necessary if the admin user has forgotten the password or cannot log in due to the `Invalid username or password` error.

[Another admin user can reset the admin password](#) through the helpdesk. However, if you do not have access to the helpdesk, you can reset the password using the MySQL query.

This topic provides instructions on how to reset the administrator password through MySQL when you do not have access to the helpdesk.

### Note:

If you have a Download license and have installed GFI HelpDesk on your web server, you need direct access to MySQL to reset a password.

Follow the below steps:

1. Use the following MySQL query to fetch a list of your staff users:

```
SELECT title,  
fullname,  
username  
FROM swstaff sw  
JOIN swstaffgroup sg  
ON ( sw.staffgroupid = sg.staffgroupid );
```

2. Identify the staff's username that requires a password reset and then tailor the following MySQL query as per the username obtained:

```
UPDATE swstaff  
SET staffpassword = Sha1('abc123!@#')  
WHERE username = 'admin';
```

The above query resets the password of the `admin` staff user to `abc123!@#`.

## NOTES:

- » If none of the users on your account can log in due to the `Invalid username or password` error, please click the **Submit a Ticket** button at the top of your support page to reach out to our support team.
- » If you are a GFI HelpDesk On-Demand customer, another admin user can reset the password through the helpdesk.
- » You can follow the instructions detailed in the [Changing the Staff or Admin Password Through the Helpdesk](#) article.
- » If there is only one admin user on the account, please contact the customer support team by clicking the **Submit a Ticket** button on your support page and we can help you regain access to your helpdesk.
- » Please send us your **Order ID** or **Transaction ID** as part of the authentication process.

## 5.11 Frequently asked questions

Have a question about GFI HelpDesk?

You're in the right place! Find answers to common questions here.

Topics in this section:

---

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5.11.2 Common issues .....	331
5.11.3 Other issues .....	371

---

### 5.11.1 Installation issues

Refer to the following topics for resolving installation, upgrade and configuration issues and contacting our support team.

#### Installing and configuring Kayako Desktop for macOS (KDFM)

Each member of your team needs to install Kayako Desktop on their computer, and then connect it to your GFI HelpDesk instance. Then, they'll be able to monitor visitors to your website and handle customer conversations in real time.

The installation process for Kayako Desktop is different for Windows and macOS. This article details the installation process for Kayako Desktop on macOS.

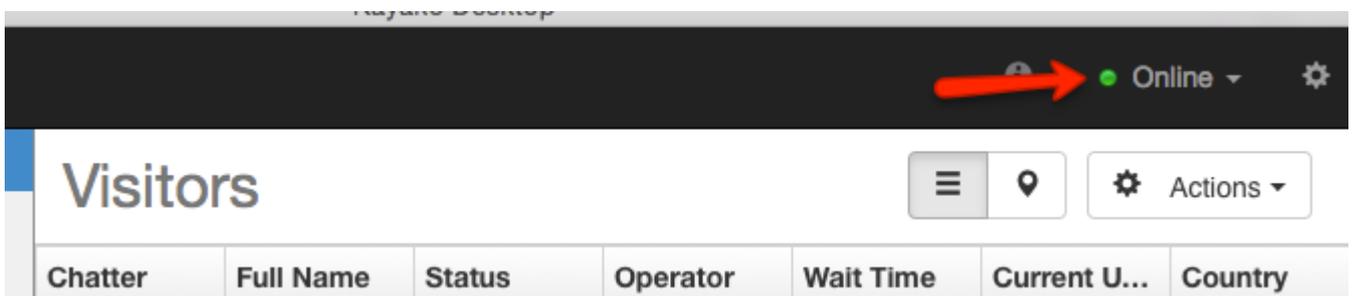
#### Note:

You require access to Administrator Account for macOS.

To install Kayako Desktop on macOS follow the steps below:

1. Download [Kayako Desktop for Mac](#).
2. Open the file to launch the installer.
3. On the **Introduction** screen, click the **Continue** button.

4. On the **License Agreement** screen, click the **Continue** button and then the **Agree** button in the pop-up window that appears.
5. On the **Destination Select** window, select the drive you want to install Kayako Desktop on, then click **Continue**.
6. On the **Installation Type** screen, click the Install button to begin the installation process.
7. Enter your computer's administrative password and click **Install Software**.
8. The **Summary screen** should display the message: **The installation was successful**.
9. Click the **Close** button to finish the installation.
10. Go to the **Applications** folder and open Kayako Desktop.
11. On the front page, click the **Add an account** button to connect to your GFI HelpDesk instance.
12. In the **Preferences** window that appears, add a name for your account in the **Account Name** field.
13. In the **Help desk URL** field, enter the full URL for your support site, for example, `https://support.[yourcompany].com`.
14. In the **User Name** and **Password** fields, enter the credentials you use to login to your support site.
15. Check the **Auto-connect** box, if you want KDFM to automatically log in to this account when you start.
16. Click the **Save** button to add your account.
17. Click the **Close** button in the upper right to close the **Preferences** screen.
18. Click on the account you just added to connect to your GFI HelpDesk instance.
19. If Kayako Desktop has connected to your support site successfully, you'll see the **Online** indicator in the upper-right.



Screenshot 200: Check the online indicator

## Installing and configuring Kayako Desktop for windows (KDFW)

Each member of your team needs to install Kayako Desktop on their computer, and then connect it to your GFI HelpDesk. Then, they'll be able to monitor visitors to your website and handle customer conversations in realtime.

The installation process for Kayako Desktop is different for Windows and macOS. This topic details the installation process for Kayako Desktop on Windows.

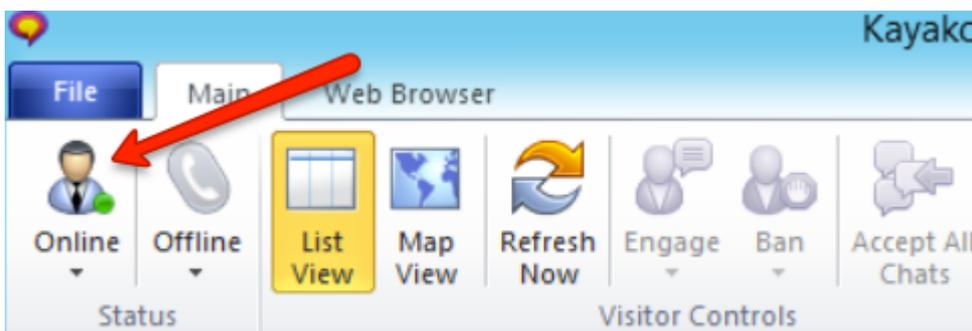
### Important:

Administrator account for Windows is a pre-requisite.

To install Kayako Desktop for Windows, follow the steps given below:

1. Download [Kayako Desktop for Windows](#).
2. Open the file, and hit the **Run** button on the security window that appears.
3. Click the **I accept the terms of the License Agreement** button and then click Next.

4. Choose whether you'd like to add **Start Menu Shortcuts** or not, and then click Next.
5. Select a location to install your files in the Destination Folder field.
6. Click **Next** to begin the installation process.
7. On the next screen, click the **Finish** button to complete the installation.
8. Next, you'll see the first screen of the **Kayako Desktop Setup Wizard**.
9. Select your language, and click the **Next** button.
10. On the accounts screen, click the **Add...** button to connect to your GFI HelpDesk instance.
11. In the **Create New Account** window that appears, add a name for your account in the Set a name for this account field.
12. In the next field, enter the full URL for your support site, for example, `https://support.[yourcompany].com`.
13. Check the box if you want Kayako Desktop to automatically log in to this account when you start.
14. If you do choose to log in automatically, you can check the next box to set a default status for you at startup.
15. In the fields in the **User Credentials** section, enter the username and password you use to log in to your support site.
16. If you like, you can customize the tab color of your chat windows, by dragging the **Tab Color** slider.
17. Click the **OK** button to finish creating your account.
18. Click the **Next** button to go to the last screen.
19. On the **General Settings** screen, you can select your startup options, as well as choosing your refresh interval.
20. When you have your settings configured, click the **Finish** button to launch **KDFW**.
21. If **KDFW** has connected to your support site successfully, you'll see the Online indicator in the upper-left corner of the UI.



Screenshot 201: Online indicator

## Blank page during installation

This topic provides information about the issue of a blank page during installation.

If you get a blank page on running the "setup" script, then you need to follow the below steps:

- » **Check for the prerequisites** – Go to `/checklist.php` and see if any errors are being displayed. Resolve all errors.
- » **Enable display errors in PHP** – Enable **display\_errors** for the PHP installed on your server. This PHP parameter is set in the `php.ini` file. Once set to **On** it shows you on-screen PHP errors as and when they occur.

## Downloading the files needed for upgrading GFI HelpDesk

This topic provides the step-by-step process to download the files needed for upgrading GFI HelpDesk.

If you are on a 'Download' subscription, you can download the latest GFI HelpDesk release files for upgrading your GFI HelpDesk instance.

Download GFI HelpDesk from the following location depending on the required edition:

<b>Case</b>	<a href="http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_case.tar.gz">http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_case.tar.gz</a>
<b>Fusion</b>	<a href="http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_fusion.tar.gz">http://cdnd1.gfi.com/gfihelpdesk/gfihelpdesk_fusion.tar.gz</a>

## Error: 'Failed opening required \_\_swift/config/config.php'

This topic provides information about the error which occurs during installation. The following error is displayed:

### Failed opening required \_\_swift\config\config.php

If you get this error when running the installation, it is most likely that you have not renamed `config.php.new` to `config.php` in the following folder: `__swift\config`.

The configuration file is named `config.php.new` by default to prevent overwriting during upgrades.

## Error: 'Access denied for user 'user'@'localhost''

This article provides information about the access denied error while connecting to the MySQL server. The following error is received:

### Access denied for user 'user'@'localhost'

The MySQL user credentials which are specified in `__swift/config/config.php` are being rejected by your MySQL server.

For information on creating a new MySQL user, see [Creating and Selecting a Database](#).

## Running `phpinfo` on GFI HelpDesk server

Sometimes, when troubleshooting GFI HelpDesk download issues, the customer may be asked for details about the PHP environment on their server. The `phpinfo` function can be used to return the information about the server's PHP configuration in an HTML format.

This article provides instructions for running the `phpinfo` command.

Follow the instructions provided below:

1. Create a new text file on your computer, and add the code: `<?php phpinfo (); ?>`
2. Save the file as `phpinfo.php`.
3. Upload `phpinfo.php` to the web content folder of your domain using the FTP.
4. Run `phpinfo` by navigating to `yourdomain.com/phpinfo.php` in your browser. Replace `your-domain.com` with your actual domain name.

For more information, see [phpinfo - Documentation](#).

## Error: 'The 'X' Module is not configured to load with PHP' during system requirements check

This topic provides information about the error in loading the module during the system requirement check. The following error is received:

### The 'X' Module is not configured to load with PHP

Your server is missing some prerequisites that are needed for GFI HelpDesk to run. Refer to the up to date list of [server requirements](#).

## Disabling MySQL strict mode on the server

**MySQL Strict Mode** controls how invalid or missing values in data changing queries are handled. This includes `INSERT`, `UPDATE` and `CREATE TABLE` statements. With **MySQL Strict Mode** enabled, which is the default state, invalid or missing data may cause warnings or errors when attempting to process the query.

When Strict Mode is disabled, the same query would have its invalid or missing values adjusted and would produce a simple warning. This may seem like the preferred result; however, with Strict Mode disabled, specific actions may cause unexpected results. For instance, when the value being inserted exceeds the maximum character limit, it is truncated to fit the limit.

For GFI HelpDesk to run on your server, you need to disable Strict Mode in your MySQL database.

This topic provides the instructions to make changes to the configuration to disable the **Strict Mode**.

To disable the **Strict Mode**, do the following:

1. Open the `my.ini` or `my.cnf` file for editing (the file you have depends on whether you are running Windows or Linux).
2. Find the following line:

```
sql_mode = "STRICT_TRANS_TABLES,NO_AUTO_CREATE_USER,NO_ENGINE_SUBSTITUTION"
```

3. Replace it with the line below:

If the line is not found, insert the line under the `[mysqld]` section (if there is no `[mysqld]` section, create it).

```
Create mysqld in the following way:  
sql_mode= ""
```

4. Restart the **MySQL** service for the change to take effect.

If restarting is not a feasible option at the moment, you may log into the database server and execute the below command for the changes to take effect immediately. However, the change is discarded the next time the MySQL service restarts unless the above process is performed.

```
set global sql_mode= "";
```

### Error: 'Can't connect to MySQL server on '127.0.0.1' (10061)'

This topic provides information about the error in connecting MySQL server.

If you get an error **Can't connect to MySQL server**, then the MySQL service is probably not running on your server, or you have provided the wrong MySQL server hostname in GFI HelpDesk's configuration file `___swift/config/config.php`.

## 5.11.2 Common issues

Refer to the following topics for resolving common issues and contacting our support team.

---

---

## Disabling the autoresponder email for unregistered users

An autoresponder is sent either when a user sends an email or submits a ticket to the Support Center. Both these formats of ticket submission have unique autoresponders associated with them that can be suppressed.

If you want to stop the autoresponder email from being sent to unregistered users, you can configure the guest user group's permission settings.

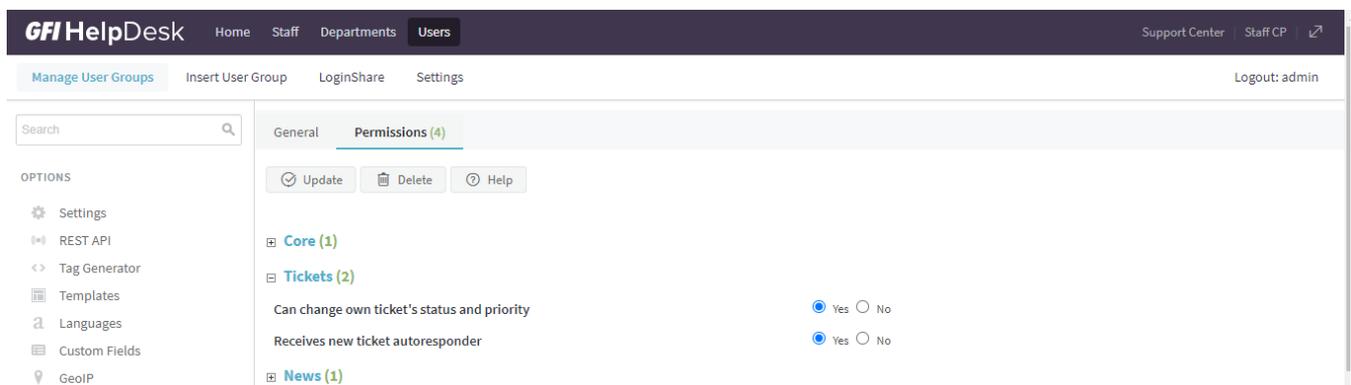
If you want to stop receiving emailed tickets from unregistered users, configure the email queues.

This topic outlines the steps to turn off the autoresponder so you can stop receiving emailed tickets from unregistered users. Steps for configuring your email queue is also provided.

### Disable the autoresponder email for tickets created the support center

To turn off the autoresponder for the Support Center tickets created by unregistered users, follow the steps below:

1. From the Admin Control Panel, navigate to **Users > Manage User Groups > Select the Guest Group > Permissions tab > Tickets**.
2. Change the **Receives new ticket autoresponder** to **No**.
3. Click **Update** to save your changes.

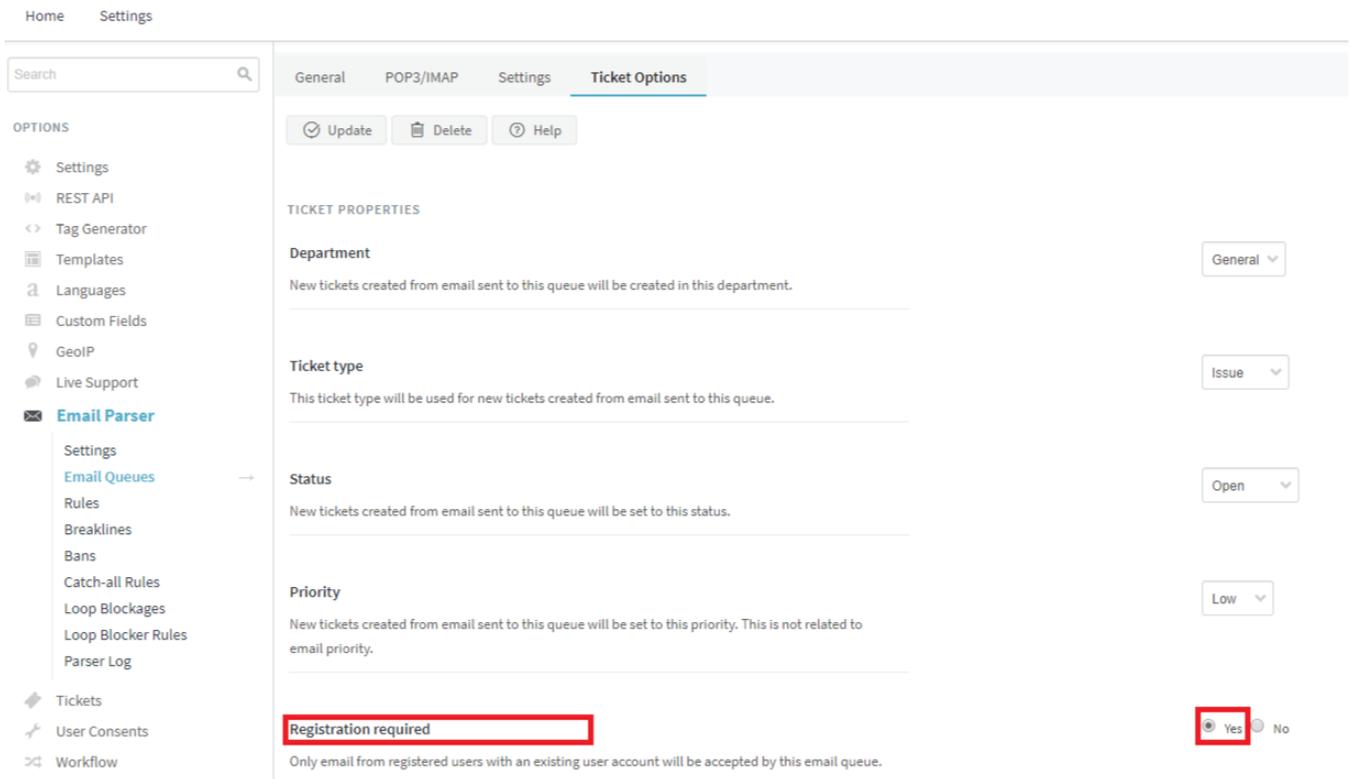


Screenshot 202: Disable the autoresponder

### Stop Receiving Emailed Tickets from Unregistered Users

To stop receiving tickets from unregistered users, follow the steps given below:

1. From the Admin Control Panel, go to **Email Parser > Email Queues > select the Email Queue > Ticket Options** tab.
2. Change **Registration required** to **Yes**.



Screenshot 203: Set the Registration Required radio button

3. Click **Update** at the top of the screen to save your changes.

## Adding videos or images in knowledge base articles

This topic shares the options for adding images or videos to knowledge base articles.

### Adding images to articles

When editing articles, click on the framed landscape icon, to reveal the following three options in different tabs:

#### » Reference the source (General)

- » Input the physical path of the image in URL format. For example, if you were to have your image stored in the root of your GFI HelpDesk instance, you would put in the **Source** field something like `http://your.gfihelpdesk.url/image.png`.
- » Specify a description for the image along with the specific dimensions you would prefer the image to show.
- » If you want the image to maintain its form, make sure to check the **Constrain Proportions** checkbox.

#### » Upload

- » In this method, use the File Explorer to point to the image you would like to add, or drag it from the **File Explorer** and drop it in the dotted box, and click **OK**.

#### » Advanced

### Adding videos to articles

When editing articles, click on the **video film** icon, to reveal the following three options in different tabs. Depending on the option, a video player is shown enabling users to play the provided video.

### » Reference the source (General)

- » Input the physical path of the video in URL format. For example, if you were to have your video stored in the root of your GFI HelpDesk instance, you would put in the Source field something like `http://your.GFIHelpDesk.url/video.mp4`.
- » Specify a description for the video along with the specific dimensions you would prefer the image to show.
- » If you want the video to be shown in the standard 16:9 aspect ratio, make sure to check the Constrain Proportions checkbox.

### » Embed

- » In this method, it is required that the video you want to show is hosted on a video playing platform that enables **code embedding**.
- » Obtain the code from that platform, copy it and paste it in the text box below the message: **Paste your embed code**.

### » Advanced

Adding multimedia with HTML

You can also insert multimedia via HTML coding by clicking either on **Tools** or on **View** and then Source code, but be aware that only HTML code is supported, which excludes other types of coding (for example, scripts, JavaScript, lightbox).

## Restricting visibility for your help center content

The core purpose of the Help Center is to house your customer-facing support docs. But many teams have more complex requirements for their self-service content.

By using GFI HelpDesk's visibility restrictions (referred within the Staff CP as Scope), you can host not only content that's restricted to certain customers but also content that's only visible to your own support agents.

This topic provides valuable information about how visibility works on the Help Center.

## Understanding Help Center Content Visibility

All restrictions to your Help Center content are controlled at the category level. You can choose from the following basic tiers of access:

- » **Global**: This tier is for both your end users and your staff.
- » **Public**: This option is used to restrict the category to only your end users of your Help Center. You can also be more specific as to which types of users can have access to your Help Center by enabling or disabling visibility to explicit user groups.
- » **Private**: This option can be used to create an internal Help Center accessible to any logged-in agent. You can also get more specific, by restricting categories to agents in particular teams.
- » **Inherit**: This option is only available when you specify a category within another one and after you have saved these changes; just like the name says, it makes the child category inherit the access specified on the parent's category.

### Note:

If a child category has defined their scope as Public, but its parent category has its scope set as Private, the child category is not accessible to end users.

## LoginShare Error: Invalid Data Provided: 2

The following error message appears in the support center login page:

## Invalid data provided: 2

This suggests that you have enabled the **LoginShare** for users and something is wrong either with the user account in the third-party database or the **LoginShare script**.

To resolve this error, do the following:

1. Check if the issue is with the specific user account or if no user is able to log in the help center.
2. Verify the **LoginShare** settings in your GFI HelpDesk under **Admin CP > Users > LoginShare**.
3. Set all the required fields in the **LoginShare** settings properly.

## Moving data from another helpdesk system to GFI HelpDesk

GFI HelpDesk has no built in migration from other 3rd party helpdesk systems. For such migrations we suggest to coordinate with any third party that can offer such a service.

An example third party migration service is [\\*https://help-desk-migration.com/\\*](https://help-desk-migration.com/)

GFI HelpDesk is built on Kayako Classic so use that as destination helpdesk for quoting or reference.

## Sharing a ticket submission link of a specific department to customers

This topic provides information on the URL used by the customer to submit a ticket under one specific department.

If you wish that your clients should be able to submit tickets directly to a specific department without having the option to choose any department, the following 'direct URL' can be used for ticket submission under one specific department:

`http://yourdomain.com/index.php?/Tickets/Submit/RenderForm/<departmentID>`

You can check the `<departmentID>` by hovering over the department name which reflects the details at the bottom left corner of the screen.

## Knowledge base search not returning relevant results

This topic provides the process to be followed for the knowledgebase search to return the relevant results.

Knowledgebase search is used by the clients to search and find their own answers to simple queries. Please perform the following steps:

1. Re-index the knowledgebase articles from **Admin CP > Knowledgebase > Maintenance**.
2. Rebuild help desk cache from **Admin CP > Diagnostics > Rebuild Cache**.

Also, make sure that the words used for search are not the "stopwords", as specified in MySQL. The list of the words can be found at [Full-Text Stopwords](#).

## Error: Uncaught Exception: Invalid data provided22 (0)

The following error may occur when you try to access your help desk:

**Uncaught Exception: Invalid data provided22 (0) in /path/to/document/root/\_\_\_swift/library/TemplateEngine/class.SWIFT\_TemplateEngine.php:976**

This error is received because your helpdesk is not installed.

To resolve this error:

Execute the setup script using the URL `http://[yourdomain].com/setup/` to install the help desk.

## Search functionality for users in the help center

The Search functionality works differently depending on whether your end users are logged in or not on your Help Center.

This topic provides you with valuable information about the behavior of search functionality for both kinds of end users.

If a user is logged in and performs a search, the list of results first prioritizes any tickets that contain words that match the search criteria and then shows the list of articles that match the criteria.

If a user that is not logged in performs a search, the list of results only show the list of articles that match the criteria and no tickets.

### Note:

- » In order to change the order of results for logged in users, a change in the source code must be done.
- » There is currently no configuration option/setting to disable searching within tickets for logged in users.

## Changing the name of a widget

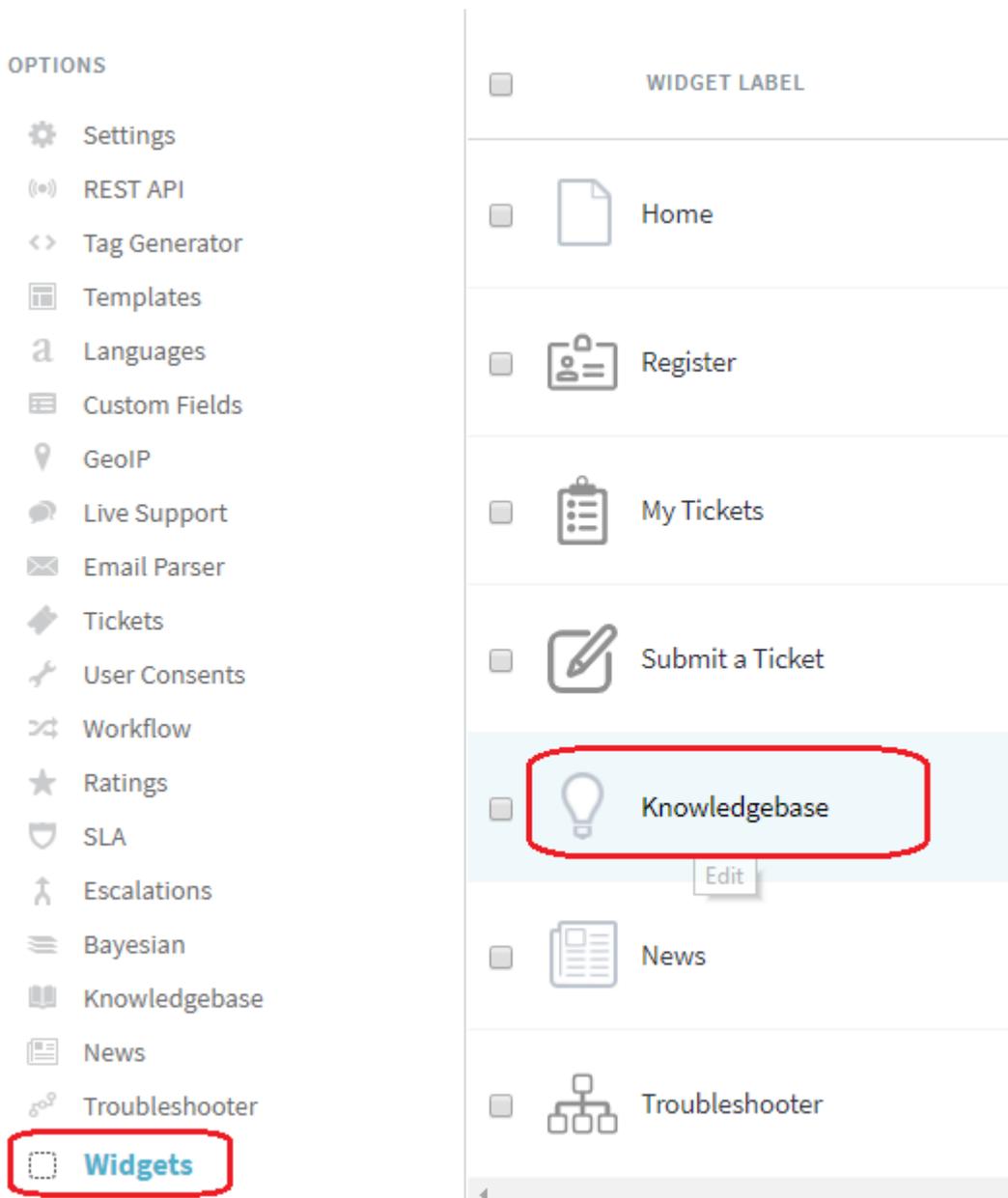
The Widget section is provided under the Options menu of the Admin control panel. By clicking on the Widget, you can see all the current widgets inserted in the support desk, along with their display order. By default, there are six widgets that come with a newly installed version 4 Support Desk, namely:

- » Register
- » My Tickets
- » Submit a Ticket
- » Knowledgebase
- » News
- » Troubleshooter

This topic provides instructions to change the name of a Widget.

Follow the instructions provided below to change the name of the Widget called Knowledgebase:

1. Click on the **Knowledgebase** widget to edit it.



Screenshot 204: Click Knowledgebase widget

2. Modify the **Widget Label** with the phrase you want – for example, phrase: Frequently Asked Questions.

**NOTE:**

Make a note of the Widget name that is shown after the PHRASE.

**General** Options Permissions

Update Delete Help

**Widget label**  
For example, *Community Forums*. You can prefix the title with "PHRASE:" to load the respective language phrase.

PHRASE:Knowledgebase

**URL**  
Enter the URL that the widget will take users to.

/Knowledgebase/List

Screenshot 205: Note the widget name after PHRASE

3. Click the **Update** button.

✔ Widget PHRASE:Frequently Asked Questions updated

The widget PHRASE:Frequently Asked Questions was updated successfully.

**Widget label:** PHRASE:Frequently Asked Questions

**URL:** /Knowledgebase/List

**Display order:** 4

**Widget is enabled:** Yes

**Display in support center navigation bar:** Yes

**Display in home page widget list:** Yes

|  | Delete

WIDGET LABEL

---

Home

---

Register

---

My Tickets

---

Submit a Ticket

---

Frequently Asked Questions

---

News

Screenshot 206: Click Update

4. Refresh the **Help Center** portal, the changes to be visible.

### Changing the ticket id type to show a sequence of numbers

This topic provides instruction on how to change the ticket ID type to show a sequence of numbers.

For changing the ticket ID's to Sequential ticket ID's beginning from some particular number, you need to perform the below mentioned steps:

1. Navigate to **Admin CP > Settings > Tickets**, and change **Ticket ID Type** to **Sequential**.

#### Ticket ID Type

Choose how Fusion should generate new ticket identifiers. It is recommended that this is set to *Random* to increase security against spoofing attacks.

Sequential 



#### Examples:

*Sequential*: "[#194]: "

*Random*: "[ABC-123-4567]: "

Screenshot 207: Changing ticket type ID

2. Execute the following query on the helpdesk database to start ticket ID, for example, from 3000:

```
ALTER TABLE swtickets AUTO_INCREMENT 3000;
```

#### Note:

AUTO\_INCREMENT does not accept lower values once the above query is executed. Delete all the tickets from the helpdesk (including the tickets in the trash folder too) and again run the above query with a lower value to meet your requirement.

## Fetching POP3/IMAP emails manually

This topic provides information about fetching POP3 and IMAP emails manually.

The mail fetch can be executed manually by accessing the following URL (replace **[yourdomain].com** with your web URL):

```
http://[yourdomain].com/helpdesk-installation-directory/cron/index.php?/Parser/ParserMinute/POP3IMAP
```

## Live Chat is offline even after logging into the staff control panel

This article provides information related to instances when live chat is offline even after logging into the staff control panel.

There are several reasons this may be happening:

- » You may not have [Kayako Desktop](#) installed.
- » You may not have created a **Live Support** department in your GFI HelpDesk. You'll need to log into the admin control panel and create a department for your chat conversations. When creating the department, make sure the Channel dropdown is set to **Live Support**.
- » Your staff user account may not be assigned to the **Live Support** department. You can update this from the admin control panel by editing the **Assigned Departments** tab for your user account:

General	Profile	Assigned Departments	Permissions	Skills
<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Help"/>				
<b>Use team department assignments</b>				<input type="radio"/> Yes <input checked="" type="radio"/> No
The team's existing departments will be inherited by this user if enabled. If disabled, you can select specific department assignments for this user below.				
<b>Assigned Departments: Tickets</b>				
General				<input checked="" type="radio"/> Yes <input type="radio"/> No
Support				<input checked="" type="radio"/> Yes <input type="radio"/> No
Sales				<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Assigned Departments: Live Support</b>				
General				<input checked="" type="radio"/> Yes <input type="radio"/> No
Live Chat				<input checked="" type="radio"/> Yes <input type="radio"/> No

Screenshot 208: Edit the Assigned Department tab

## Using different company names and logos for different client interfaces

This topic describes the process to use different company names and logos for different client interfaces.

To create different template groups, follow the steps as described below:

1. Navigate to **Admin CP > Templates > Groups > New**.
2. Specify *Company Name* for each template group accordingly.

For different logos, the header template can be modified for each template group by following the steps as mentioned below:

1. Navigate to **Admin CP > Templates > Templates > General**
2. The following code needs to be modified at the template:

```
<div id="topbanner">
<a href="<{$_baseName}> <{$_templateGroupPrefix}>">
 Logo" id="logo" />
</a>
</div>
```

Here, you need to replace `src="<{$_headerImageSC}>"` code with logo image URL.

## Fatal Error: 'Call to undefined function mysql\_connect()'

This topic provides information about the fatal error while calling function `mysql_connect()` received when trying to install GFI HelpDesk.

If you get an error like **Fatal error: Call to undefined function mysql\_connect()** when trying to install GFI HelpDesk, it probably means that MySQL support has not been enabled for PHP on your server (that is, the PHP module `php-mysql` has not been installed).

You can confirm whether or not the MySQL module is present by accessing a `phpinfo()` page for the server. The MySQL module (if installed) appears in the `phpinfo()`.

## Codecs supported with VoIP feature in Kayako Desktop

While using VoIP application to call someone, the analog audio signal generated by the microphone cannot be sent over the internet directly and needs to be digitized and compressed before it can be sent over the internet.

The mathematical models enable the coding and compression of such analog audio signal which is referred to as "Codecs". Originally, the term CODEC referred to a COder/DECoder: a device that converts between analog and digital. Now, the term seems to relate more to COmpression/DECompression.

One of the important features of a codec is its bitrate, which refers to the number of bits that are required to be transmitted per second. The higher the bitrate the higher is the bandwidth requirement, so the purpose of the various codecs is to strike a balance between efficiency and quality.

The list of codecs that are supported with VoIP feature in Kayako Desktop application is the following:

- » G.711 family codec (PCMA, PCMU), Speex/8000 (narrowband), Speex/16000 (wideband), and Speex/32000 (ultra-wideband) with fix bit rate and adjustable quality/complexity settings. Fixed mode implementation is used for targets which lack floating point unit.
- » iLBC in 20 or 30 ms mode, with encoder mode, is adjusted based on remote's SDP (decoder mode is adjustable during initialization only).
- » GSM, G.722, G.722.1, and G.722.1C licensed from Polycom. More codecs provided by Intel IPP: G.723.1, G.726, G.728, G.729A, AMR, and AMR-WB. The codecs provided by Nokia APS/VAS on Nokia handsets: AMR, G.729, iLBC, and PCMU/PCMA, L16 family of codecs, mono or stereo.

## Troubleshooting session expired errors

Sometimes you may run into repeated session expirations if your computer's internet connection assigns Dynamic rather than Static IP addresses. To keep your sessions from expiring every time your IP changes, you can tell GFI HelpDesk not to validate your session using your IP address.

The method for this fix depends on what version of GFI HelpDesk you're using. This article provides the GFI HelpDesk version-specific methods for applying this fix.

Follow the instructions provided below depending on the version of GFI HelpDesk installed in your infrastructure:

1. Log in to the admin control panel.
2. Click the **Settings** link and then the Security link.
3. Find the setting **Validate sessions by checking IP address** and select **No**.

Update

Help

**Session expiry**

The time (in seconds) after which a user's idle session will be removed.

21600

**Session expiry for site visitors**

The time (in seconds) that a visitor has to be idle for until their session is removed (and are no longer tracked in Kayako Desktop).

500

**Cookie domain**

If there are multiple Kayako installations sharing the same domain name, specify the cookie domain here.

**Cookie path**

If there are multiple Kayako installations sharing the same domain name, specify the cookie path here.

/

**Validate sessions by checking IP address**

Secure against cookie and session hijacking by validating the IP address of a user each time they interact with Kayako. We recommend enabling this setting if you do not use secure connections (https://).

 Yes  No*Screenshot 209: select No for Validate sessions by checking IP address*4. Click **Update** to save your changes.

### For GFI HelpDesk older than 4.66

1. Log into your server and find `../swift/config/config.php`.
2. Open the file for editing.
3. Search for the following: `define ('SESSION_IPCHECK', false);`
4. Replace `false` with `true`, so it reads: `define ('SESSION_IPCHECK', true)`
5. Save your changes and make sure they're pushed live.

### Fetching POP3/IMAP emails from GFI HelpDesk

This topic provides information about fetching the POP3/IMAP emails from GFI HelpDesk.

The scheduled task (**Admin CP > Scheduled Task > POP3/IMAP fetching**) setup in the helpdesk is called pseudo cron. Pseudo cron mechanism has been provided as a fallback mechanism for the clients who are yet to configure cron jobs on their servers.

It is not fully reliable since it works only if an active staff is logged in the Staff CP. The reliable way to go about this would be to get a cron job (a scheduled task in Windows environment) configured for the same purpose through either the web control panel or shell access.

### Users not displaying in Kayako Desktop

The users are not displayed in the Kayako Desktop. This issue occurs when the database tables linked with visitors/users have reached their maximum size.

To fix this, you need to clear a couple of database tables using the following MySQL queries to clear them:

```
DELETE FROM swsessions;  
DELETE FROM swvisitorfootprints;  
DELETE FROM swvisitorpulls;
```

**Note:**

Always take the database backup before making any changes to it.

The users are successfully displayed in the Kayako Desktop.

### Identifying who deleted a ticket

This topic explains if it is possible to know who deleted a ticket.

A ticket may get deleted accidentally by a Staff member. Once a ticket is deleted from the helpdesk, it is also removed from the database. You can always check the name of the staff member who deleted a ticket from the **Activity Log**.

Activity Log logs every activity performed in the admin control panel and the staff control panel.

For example, the log contains information about inserting new staff user, editing new email queue, and deleting tickets. These logs give an insight into the activities in the helpdesk and can be found at **Admin CP > Logs > Activity log**.

### Preventing users from changing the properties of their tickets

This topic provides instruction on how to prevent users from changing the ticket properties from Client Support Center.

Users can be restricted for changing the ticket properties from Client Support Center.

To restrict the User permissions:

1. Navigate to **Admin CP > Users > Manage User Groups**.
2. select a user group then set click **Permissions** tab. Set **Can Change Ticket Properties** to **No**.

### Disabling search bar on client support center

The "Search" feature can be disabled from the Client Support Center by removing the Search box from the template code.

The "Search box" can be removed by modifying the 'header' template from **Admin CP > Templates > Templates > General**.

The following code needs to be removed from the 'header' template :

```

<form method="post" id="searchform" action="{$_baseName}>
<{$_templateGroupPrefix}>/Base/Search/Index" name="SearchForm">
<div class="helptitle">
<if $_baseIndex==t rue}>
<{$_language[pleasetypeyourquestion]}>
<{else}>
<{$_language[pleasetypeyourquery]}>
</if}>
</div>
<div class="searchboxcontainer">
<div class="searchbox">
<span class="searchbuttoncontainer">
<a class="searchbutton" href="javascript: void(0);" onclick="$('#searchform').submit();"><span></span>
<{$_language[searchbutton]}>
</a>
</span>
<span class="searchinputcontainer"><input type="text" name="searchquery" class="searchquery"
onclick="javascript: if ($(this).val() == '{$_language[pleasetypeyourquestion]}>' || $(this).val() == '{$_language
[pleasetypeyourquery]}>') { $(this).val('').addClass('searchqueryactive');}" value="{if $_baseIndex == true}><{$_
language[pleasetypeyourquestion]}><{else}><{$_language[pleasetypeyourquery]}></if}>" /></span>
</div>
</div>
</form>

```

## Translating language packs

English is the default language of the product, however, it can be translated into any language by inserting different language packs.

With a GFI HelpDesk subscription installed at the customer's own server, customers have the option to translate all the interfaces:

- » Client Support Center
- » Staff Control Panel
- » Administrator Control Panel

For more information, feel free to contact us at GFI HelpDesk Customer Support.

## Explaining the icons at the bottom of the send ticket window

Tickets can be created by staff members from the Staff Control Panel, either for sending a general email to a client or for creating a ticket on their behalf.

The **Send Mail** option (**Staff CP > New Ticket > Send Mail**) is used to send an email to the clients' email address, just like an email client.

The **As User/Phone** option (**Staff CP > New Ticket > As User/Phone**) is used to create the phone ticket for issues reported by the clients. It creates a ticket in a similar way as when the clients create them from the **Client Support Center**.

The check-boxes at the bottom of the contents box are explained below.

Option	Description
Send Mail	Ensures that an email is sent with the contents of the ticket to the email address of the client.
Macro	Add the reply to the Macros while replying.
Knowledgebase	Add the reply as a knowledgebase article.
Watch	Enable alerts of this particular ticket for client and staff replies.
Worked	Enter the time worked for a ticket post.
Billable	Enter the Billable time of a ticket post.

## Attaching files to macro-generated replies

This topic explains how to attach files to macro-generated replies.

Macros can be used to generate predefined replies from **Staff CP > Tickets > Macros > Insert Replies**. But it is not possible to attach files in macros.

However, this can be achieved by creating a private knowledge base article which is accessible to staff members only. Follow the steps given below:

1. For private knowledge base articles, the "**Private**" category can be inserted from **Staff CP > Knowledgebase > Categories**.
2. Further, an article can be inserted from **Staff CP > Knowledgebase > New Article**, and the files can be attached to the knowledge base article.
3. These knowledge base articles can be used in ticket replies by selecting the article from the knowledgebase drop-down under **Quick Insert**.
4. Once the article is selected, the file is automatically attached to the ticket reply.

## Replying to multiple tickets simultaneously

Mass Reply is used for sending the same resolution/reply/email to multiple users.

This feature is commonly used to send an email to multiple customers to inform them of scheduled maintenance and/or possible downtime.

To reply to multiple tickets simultaneously, do the following:

1. Go to **Staff Control Panel > Tickets > Manage Tickets**.
2. Select the required tickets and click **Mass Reply**.
3. A text box is displayed in which you can type your response.

## Removing staff names from ticket replies

In order to have your email replies come from a single, general support persona, rather than using individual staff members' names, you must configure email queues and the queue override feature.

To remove staff name from ticket replies, do the following:

1. Insert an email queue (**Admin CP > Mail Parser > Email Queues > New**) and link it with a department.
2. Enable the **Queue Override**.
3. Go to **Admin CP > Mail Parser > Email Queues**.
4. Select the **Email Queue**.

5. Click **Settings > Queue Overrides (Optional)**.

6. Specify the **From Name** (the name you wish your clients to see in staff replies, for example, 'Tech Support').

7. Add the name under ticket settings at **Admin CP > Settings > Tickets > Overridden Staff Name** and enable the setting **Enable Staff Name Override**.

Autoresponder and staff replies display the name configured in all outgoing emails and while viewing the tickets through the **Client Support Center**.

### Starting a chat without entering user details

Follow the steps in this topic to allow your users to start a chat without entering their details.

Edit the code for your Live Chat icon:

1. Log in to the **Admin Control Panel**.
2. Click **Tag Generator** from the options menu on the left.
3. Select **Button** under **TAG TYPE** and click **Next**.
4. Under **Routing Options**, select **Yes** for the **Skip user details form**.

### Disabling knowledge base article suggestions on the submit ticket page

The knowledge base article suggestions that appear when users start typing their opening message to a ticket is generated by GFI HelpDesk's Instant Response System (IRS). With IRS, GFI HelpDesk is able to search the knowledge base for relevant articles in real-time while the user is drafting a query for submission.

To enable or disable the IRS:

1. Log in to the **Admin Control Panel**.
2. Go to **Settings > Tickets > Enable the Instant Response System (IRS)**.

### Marking tickets as spam

Email Spam, also known as junk email or Unsolicited Bulk Email (UBE), is a subset of spam that involves nearly identical messages sent to numerous recipients by email.

- » To avoid spam emails in the help desk, you can use the **Spam** button available on tickets.
- » **Spam** button assists in marking a ticket as spam which is moved to the **Trash** folder.
- » Further, the email address of the spammed ticket is banned in the help desk, which does not allow the spammed user to submit tickets via email queue.
- » You can check the banned email address list from **Admin CP > Mail Parser > Ban**.

### Assigning tickets to staff members automatically

When tickets are created in the help desk, they are unassigned, with no ownership. To assign new tickets to the staff members, you need to manually open the tickets and change the ownership. Additionally, the ticket can be assigned to a predetermined staff member as soon as a ticket comes into the help desk.

### For the Tickets Created via Email Queue

The tickets created via email queue can be assigned to a particular staff member using mail parser rules. You can create mail parser rules from **Admin CP > Mail Parser > Rules > New**.

The criteria can be set up from the General tab page as follows:

- » \*Is Reply: Equal: False
- » \*Subject: Contains: specify the subject of the email (criteria completely depends on your requirements).
- » \*Destination Email Address: Equal: address of an email queue.
- » \*Actions: post parse
- » \*Assign the ticket: select the staff member name from the drop-down.

Now, if any of the users sends an email at the address specified in the email queue (mentioned in the above rule), then the ticket is created in the department corresponding to the email queue and assigned to the selected staff member.

### For the Tickets Created from Support Center

Tickets created from Client Support Center can be assigned to the staff members automatically by inserting the SLA plan and by linking the Escalation rule with the SLA plan.

- » You can insert the SLA (service-level agreement) plan from **Admin CP > SLA > Plans > New**.
- » You can insert the criteria according to your requirements and can define the timeline (due time) for the tickets to get Overdue. Once the tickets become overdue, they are escalated according to the Escalation rule.
- » Escalation rule can be created from **Admin CP > Escalations > New**. Further, the escalation rule needs to be linked with the SLA plan under the SLA Plan field and then you can select the staff member to whom you wish to assign the tickets under Assign the staff column.

### How do I use GeoIP to enable map view on Kayako Desktop?

To view the visitors in Kayako Desktop application in Map View, you need to install **GeoIP** at your server from the installation files.

### Enabling the knowledge base search to look for the short words

A Knowledge Base comprises of a number of articles. So it is essential for a user to be able to search for the relevant articles by specifying the keywords in the search query string. Knowledge Base search is performed at the Client Support Center by using the Search bar or while submitting new tickets.

The Knowledge Base search uses Full-Text search and the words should not be less than 4 characters in length.

To overcome this limitation so that clients can search the Knowledge Base articles by specifying 3 character words, the following change needs to be done:

1. Specify the value 3 for the variable `ft_min_word_len` in the `my.ini` file (Windows server) or in the `my.cnf` file (Linux server).
2. Once done, restart your MySQL service.

### Changing the default colors for ticket statuses and priorities

This topic provides the process to change the default text and background colors for:

#### Ticket statuses

Attribute	Process
Text Color	<b>Admin CP &gt; Tickets &gt; Statuses &gt; "Select Status" &gt; General Tab &gt; Status Color</b>
Background Color	<b>Admin CP &gt; Tickets &gt; Statuses &gt; "Select Status" &gt; General tab &gt; Status Background Color</b>

#### Ticket priorities

Attribute	Process
Text Color	<b>Admin CP &gt; Tickets &gt; Priorities &gt; "Select Priority" &gt; General Tab &gt; Foreground Listing Color</b>
Background Color	<b>Admin CP &gt; Tickets &gt; Priorities &gt; "Select Priority" &gt; General tab &gt; Background Listing Color</b>

## Effects of deleting a department on the tickets and chats

A ticket or a chat always has a department associated with it, and neither of them can be created without a department. This topic discusses the effects of deleting the department on the tickets and chats.

- » In case a ticket department is deleted from the help desk, all the tickets linked to that department lose their original department association, and are moved to the Trash folder. Deleted tickets can be checked from: **Staff CP > Tickets > Manage Tickets > Quick Filter > Trash**.
- » In case of chat logs, when a live chat module department is deleted, all the associated chat logs get unlinked from that department and are no longer visible under: **Staff CP > Live Chat > History**. However, their data remains in the database.

## Restricting custom fields to select user groups

This topic provides an answer to one of the frequently asked questions on whether it is possible to restrict custom fields to select user groups or not.

Is it possible to restrict custom fields to certain user groups? Not exactly. Custom fields cannot be restricted to particular user groups directly, but as a workaround, you can associate custom fields with particular departments and then restrict those departments to specific user groups to achieve the same effect.

To do this:

1. Start by creating custom fields from **Admin CP > Custom Fields > Groups > New**.
2. Link them with the associated departments.
3. To restrict the department to specific user groups, assign it only to the registered user group. It can be done by going to **Admin CP > Departments > Manage Departments > Permissions : Users > Restrict to Custom User Groups = Registered**

As a result, when any of the registered users logs in to the Support Center, they are able to see the specific departments only when submitting tickets, and the associated custom fields are shown upon selecting the department.

## Controlling commenting on knowledge base articles specific to user groups

This topic shows how to control commenting on knowledge base articles specific to user groups.

By default, all the users can post their comments on knowledge base articles.

- » Permissions can be enabled for the comments section so that it would be visible to the users belonging to the allowed user groups only. The permissions can be enabled from **Admin CP > Users > Manage User Groups > "Select User Group" > Permissions Tab > Core > Can Post Comments**.
- » Permissions need to be allowed for posting comments for knowledge base category as well as articles.
- » For categories, permissions can be enabled from **Staff CP > Knowledgebase > Categories > Options Tab > Allow Comments**.
- » For articles, the permissions to allow comments can be enabled from **Staff CP > Knowledgebase > Manage Knowledgebase**. Select **Article**, then go to **Options Tab > Allow Comments**.

**Note:**

The permissions for articles overrules the permissions for Category.

## Difference between AND and OR criteria

The "AND" and "OR" are the criteria options which may be used in our help desk while creating Mail Parser Rules, Notifications, and SLA Plans.

- » All the criteria that are inserted using "AND" are mandatory to meet from that set of criteria.
- » All criteria that are inserted using "OR" specify that either of the criteria in the set are met.

Using a combination of "AND" and "OR" options, the "AND" is used to collate criteria that are mandatory and the "OR" option may be used to specify the criteria from which either one of them may be used.

```
Status Equal To On Hold AND
Department Equal To Sales OR
Department Equal To Support
```

The above example implies that the '**On Hold**' Status is mandatory, and the **Department** may be Sales or Support.

## Preventing emails from being labeled as spam

If you are using a shared hosted environment, the emails may land into the **SPAM** folder when emails are sent using your own email address support@example.com. It is a common scenario on the SaaS platform.

When an email is received at user's end, the receiver's mail server can check whether the host sending the email is allowed to send an email coming from this email address or not. So, if you have set up the SaaS helpdesk as example.GFI HelpDesk.com and are using support@yourdomain.com as your email address to send emails, then you need to allow the GFI HelpDesk servers' IP to send the emails on behalf of yourdomain.com. You do not face the issue when the emails are sent from the help desk using the email address support@example.GFI HelpDesk.com as example.GFI HelpDesk.com is hosted with us and mapped correctly to our servers' IP address.

The **SPF records** must be correctly set up at your end. The SPF (Sender Policy Framework) allows a domain owner to create records in the DNS which indicate definitively about the servers that are authorized to send an email for that domain. If an email claims to be sent from within a given domain, but it comes from a mail server not listed in the SPF data, it can be safely assumed that the email is lying about its source, and it can be rejected as SPAM.

To resolve this:

1. Set the **SPF record** allowing the SaaS servers' IP address to send emails on your behalf.
2. You may check the SaaS server IP address by using the **nslookup** command, that is, nslookup example.GFI HelpDesk.com. You may also request for the IP address of the related server from support.
3. If you have your own SMTP server, you may insert the SMTP access details in the helpdesk: **Admin Control Panel > Settings > Email Settings**.

**NOTE:**

For more information on setting up SPF for your GFI HelpDesk account, refer to [Using SPF to avoid emails from being marked as spam](#) (page 138).

## Preventing staff from reassigning tickets

This topic describes how to prevent the staff from reassigning tickets.

The reassigning of tickets can be controlled from Staff Permissions as below:

1. Navigate to Admin **CP > Staff > Manage Teams > Permissions:Staff**.
2. Under **Tickets**, set **Tickets option** to **View only**.
3. Click **Update** to save the changes.

## Stopping the autoresponder from being sent

Autoresponder is sent when a user submits a ticket from the Support Center or by sending an email. Both these formats of ticket submission have unique autoresponders associated with them that can be suppressed if need be.

This topic guides you through the process of turning off the autoresponder for tickets created using the Support Center and through email.

## Support Center

To turn off the autoresponder for the Support Center tickets, follow the steps given below:

1. From the **Admin Control Panel**, navigate to **Users > Manage User Group**.
2. Select the User Group and go to the **Permissions** tab.
3. Go to **Tickets**.
4. Change **Receives new ticket autoresponder** to **No**.
5. Click **Update** to save your changes.

The screenshot shows the GFI HelpDesk Admin Control Panel. The top navigation bar includes 'Home', 'Staff', 'Departments', and 'Users'. Below this, there are tabs for 'Manage User Groups', 'Insert User Group', 'LoginShare', and 'Settings'. A search bar is visible on the left. The main content area is divided into 'General' and 'Permissions (4)' tabs. Under 'Permissions', there are three sections: 'Core (1)', 'Tickets (2)', and 'News (1)'. The 'Tickets (2)' section contains three items: 'Can post comments (on knowledgebase, news articles etc)' with 'Yes' selected, 'Can change own ticket's status and priority' with 'Yes' selected, and 'Receives new ticket autoresponder' with 'No' selected. The 'Update', 'Delete', and 'Help' buttons are visible at the top of the permissions list.

Screenshot 210: Set **Receives new ticket autoresponder** to **No**

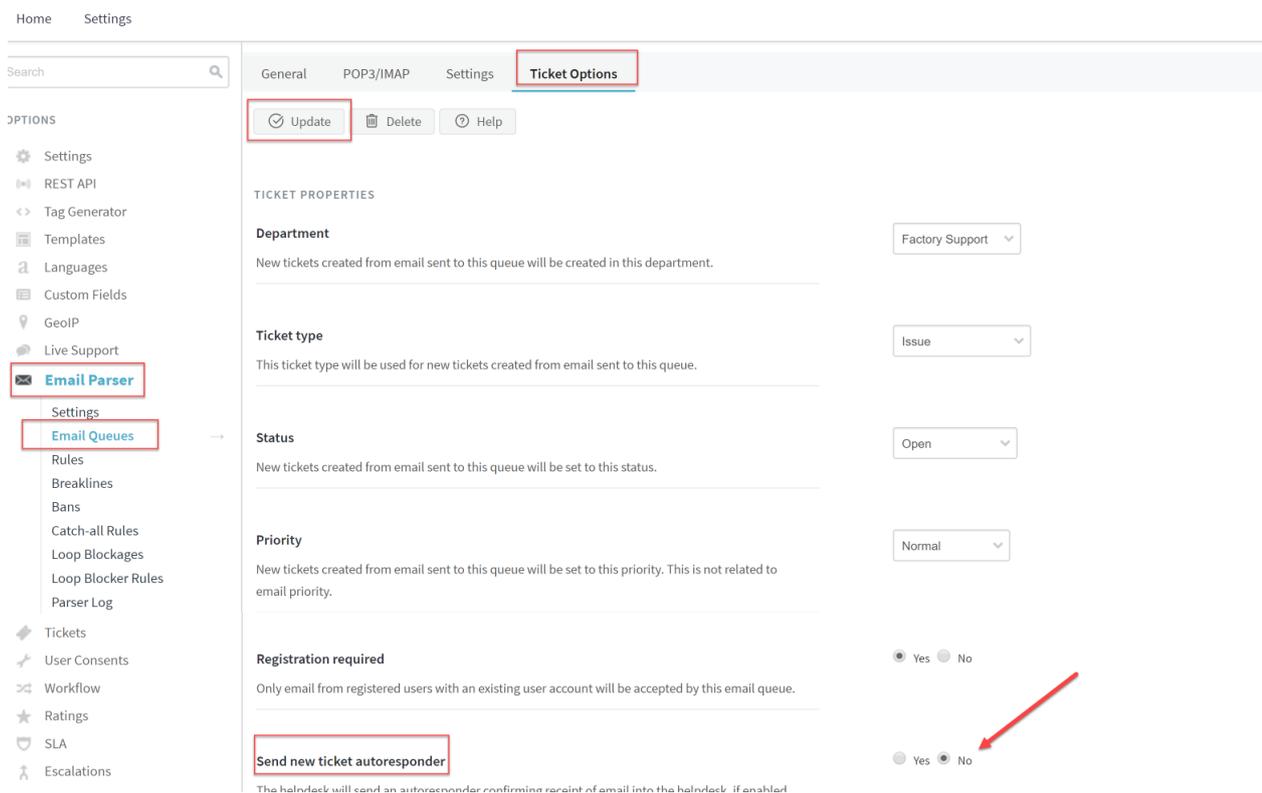
## Emailed Tickets

To turn off the autoresponder for the emailed tickets, follow the steps given below:

1. From the **Admin Control Panel**, go to **Email Parser > Email Queues**.
2. Select the Email Queue and go to the **Ticket Options** tab.

3. Set **Send new ticket autoresponder** to **No**.

4. Click **Update** to save changes.



Screenshot 211: Set **Send new ticket autoresponder** to **No**

## Changing the helpdesk domain name

This topic provides information regarding changing the helpdesk domain name.

You can request a domain name change as long as your GFI HelpDesk license is kept within the same organization and ownership. In other words, it is not possible to transfer or sell a Kayako license from one organization to another.

Contact the Support team to add, remove, or update a domain name. As part of the authentication process, you have to provide either your Order ID or any of your Transaction IDs. These can be retrieved from your Kayako account.

### Note:

Your subscription must be active in order to proceed with the changes.

## Unlocking GFI HelpDesk account after unsuccessful login attempts

This topic provides relevant information for cases where you need to unlock your GFI HelpDesk account after unsuccessful login attempts.

If your account has been locked because of several unsuccessful login attempts, you can request your GFI HelpDesk admin to adjust the time after which it gets restored. The setting are available under **Admin CP > Settings > Security > Remove lockout after: X seconds**.

## Accessing the bcc field on tickets

This topic provides relevant information for users to access the bcc field on tickets.

You can access the bcc field under the **Edit** tab on the tickets. Additionally, you can find the bcc option when replying to a ticket by clicking on the Options tab. The bcc field appears below the **Reply Text** area.

## Creating canned responses

This topic provides useful information on creating canned responses.

Canned responses can come in handy when the same text has to be used many times. You can create canned responses for both tickets and live chat:

- » For tickets, refer to [Reusing Common Replies and Updates Using Macros](#).
- » For live chat, refer to [Canned Responses in Kayako Desktop](#).

## Use of breaklines

This article provides useful information about the use of breaklines.

- » Breaklines are used to truncate text in incoming emails. This is useful when emails from the users contain some repeated contents in the form of ticket history.
- » You can edit breaklines from **Admin CP > Email Parser > Breaklines**.
- » In addition, you need to insert breaklines at the top of your templates. The templates concerned are:
  - » `email_ticketstaffreplyhtml`
  - » `email_ticketstaffreplytext`

### Note:

If you have multiple template groups, you need to insert breaklines for each one of them.

For detailed instructions on using breaklines, refer to [Using Break-Lines to Remove Previous Replies from Incoming Emails](#).

## Adding staff members

This topic provides valuable information about adding staff members.

You can add staff members by navigating to **Admin Control Panel > Staff > Manage Staff > Insert Staff**.

You should be able to assign Team, Department/s and other permissions to a staff member when creating the account.

For further details on how to assign different departments and permissions to staff members, refer to [Creating staff accounts and assigning them to teams](#).

## Customizing the ticket submission form

This topic guides you through the process of customizing the ticket submission form.

- » Use **Custom Fields** to customize the Ticket Submission form.
- » **Custom Fields** are linked with Custom Groups, which decide the location (User ticket submission form, Staff ticket submission form, etc.) of the Custom Fields.

To do so, follow the steps below:

1. You can add a Custom Group by navigating to **Admin Control Panel (CP) > Custom Fields > Groups > New: Location**.
2. Now add Custom Fields by navigating to **Admin CP > Custom Fields > Fields > New > Select the Custom Field Group** to associate with.
3. You can also select the type of custom fields that you want to use, such as Text, Radio, etc.

For more details on Custom Fields, refer to [Creating custom fields for capturing user and ticket information](#).

## Cron's running frequency

This topic provides relevant information that relates to how often the cron runs.

In GFI HelpDesk, the cron runs every ten (10) minutes; this provides enough time for tasks to be completed regardless of the task for example, fetching emails into GFI HelpDesk, running reports, etc.

## Ticket search not working in the staff control panel

Ticket search does not retrieve relevant tickets when using Advanced, Quick Search or Filters.

This topic provides a resolution to this issue.

Ticket search is used by the staff to search and find the tickets related to any subject, content or belonging to a particular user. To fix this, please perform the following steps:

1. Re-index the tickets search from **Admin CP > Tickets > Maintenance > Rebuild Search Index > Rebuild**.
2. Re-index the ticket properties form **Admin CP > Tickets > Maintenance > Rebuild Properties > Rebuild**.
3. Rebuild helpdesk cache from **Admin CP > Diagnostics > Rebuild Cache**.

### Note:

CP stands for **Control Panel**.

## Appending email replies to existing tickets

This topic provides relevant information that explains how email replies are appended to existing tickets.

Email replies are appended to existing tickets if they pass a series of checks. The checks are performed in the following order:

1. GFI HelpDesk checks for the **ticket ID** in subject with the correct format, that is, [#Ticket ID:]. If found, the reply gets appended to the existing ticket.
2. GFI HelpDesk searches for the **ticket ID** in the body of the reply.

### Note:

This check is only performed if you enabled the Search for ticket ID in email body option.

3. Finally, GFI HelpDesk looks for a colon symbol (':') with the existing ticket subject from the same user. If it finds a match, then the reply is appended.

For any discrepancies when replies are added to existing tickets, you can look for the attributes above in the parser logs for those tickets.

## Seeing survey responses from users

This topic indicates where you can see survey responses from users.

Customer's surveys for both **Live Chats** and **Tickets** can be viewed in the **Staff CP**. You can also run reports on them.

» **Settings for Chat Surveys:** These settings can be found under **Staff CP > Live Support > Messages/Surveys**. Keep in mind that a star symbol represents surveys.

» **Settings for Ticket Surveys:** You can find the survey comments on the ticket itself, as a private post. It is highlighted to differentiate it from an original post.

» **Report to see all Ticket Survey responses:** You can [create a report](#) with the following KQL code to see all Ticket Survey responses:

```
SELECT 'Tickets.Ticket ID','Ticket Posts. Contents' FROM 'Ticket Posts' WHERE 'Ticket Posts.Is Survey Comment' = '1'
```

» If you were to look for Ticket Survey scores, we have some example reports defined in [our KQL Condition & Operator Reference](#).

## Changing the 'To' Email ID when replying to a ticket

This topic provides relevant information to be used when changing the 'To' email ID when replying to a ticket.

When replying to a ticket, you need to go to the **Edit** tab, where you can change the 'To' email ID as required. Once done, you can return to the **Reply** tab to finish and send your message.

## Preventing staff from trashing tickets

This topic guides you through the process of preventing the staff from trashing tickets.

You can prevent this by restricting Staff Team permissions.

To do so, follow the steps given below:

1. From the **Admin Control Panel**, navigate to **Manage Teams > Team > Permissions:Staff**.
2. Under **Tickets** set **Send tickets to trash** to **No**.
3. Click **Update** to save changes.

## Size limit for an email attachment

This topic provides information about the size limitation of an email attachment.

You and your users can enjoy attachments of up to 10 MB. If you are on the latest release, your users would be notified automatically when their attachment exceeds the allowed limit. They can then send them by breaking into smaller attachments.

## Allowing users to edit the ticket type and priority fields when submitting tickets

This topic details the settings required for allowing users to edit the Ticket Type and Priority fields when submitting a ticket.

In order to allow end users to select **Ticket Type** and **Ticket Priority** when submitting a ticket, they have to be made **Public**. You can make them **Public** from the following settings:

- » For Ticket types, navigate to **Admin CP > Tickets > Types > Select the Type > General tab > Visibility: Public**.
- » For Ticket Priorities, navigate to **Admin CP > Tickets > Priorities > Select the Priority > General tab-> Priority type: Public**.

## Setting up department permissions based on user groups

If you want to restrict department visibility to a particular set of users, you can do so by using permissions for that department. This article describes the process to set up department permissions based on user groups.

To set up the Department, follow the steps below:

1. Navigate to **Admin CP > Departments > Manage Departments**.
2. Select the required department.
3. From the **Permission: Users** tab, select the **User Groups** who should be able to view this **Department**.
4. Select **Update**.

### Error 'csrfhash'

This topic describes the reasons why the csrfhash error appears in GFI HelpDesk.

CSRF code is added to add a security layer to GFI HelpDesk.

There are two main reasons why you could get a csrfhash error in GFI HelpDesk:

- » You are likely to get this error if you are being redirected to GFI HelpDesk login from some other website.
- » The error may also happen if your templates are way out of date.

### Error launching GFI HelpDesk: 'Get() on a non-object'

The following error appears when connecting to GFI HelpDesk:

#### **Get() on a non-object.**

In this topic, we'll help you diagnose what exactly is disrupting your connection so you can go about resolving it.

We're going to go through several steps to troubleshoot the issue:

- » We'll check to make sure that all of the required PHP plugins are in place.
- » We'll take a look at your `config.php` file to make sure everything is in order.
- » We'll double-check that your database credentials are still valid.
- » And if we still haven't found the problem, we'll show you how to edit a settings file in order to make it divulge the specific problem that it's encountering.

### Root cause

This error appears to Download customers when GFI HelpDesk is unable to establish a connection with your database. The trouble is, there are multiple factors involved in establishing that connection, any of which could be the culprit.

### Resolution

#### **Check your PHP plugins**

GFI HelpDesk officially supports MySQL for its database system and relies on PHP to initiate all connections to MySQL. PHP offers several MySQL extensions for accessing a MySQL database. GFI HelpDesk uses the following extensions:

- » MySQL – required for all versions of PHP
- » MySQLi – required for PHP 5.5.x or later
- » MySQLnd – required for PHP 5.5.x or later

To check which extensions you have installed, consult your PHPInfo page or ask your server administrator to check it for you.

#### **NOTE:**

You can double-check the rest of GFI HelpDesk's server requirements.

#### **Review your 'config.php' file**

If all of your PHP extensions are present and accounted for, the next thing to look at is your server connection configuration. From your GFI HelpDesk root directory, if you navigate to `__swift/config/` and open up the `config.php` file, you'll see that it's full of database connection parameters.

There are a few things you should double-check here:

- » Make sure that you have a `config.php` file: If you've updated GFI HelpDesk, there's a good possibility that you may have, instead, a `config.php.new` file in this directory, waiting to be activated. If this is the case, remove the `.new` from the filename, open it up and fill in your database details.
- » Double-check your database details: The `config.php` file should reflect your current server details. The fields you want to check are as follows:
  - » `DB_HOSTNAME`
  - » `DB_USERNAME`
  - » `DB_PASSWORD`
  - » `DB_NAME`

### Validate your database credentials

If everything in your `config.php` file looks right, the next step is to make sure that your server credentials are still valid. The easiest way to validate the database credentials is to run the following MySQL command:

```
mysql -h DB_HOSTNAME -u DB_USERNAME -p DB_NAME
```

If you get an error here, you'll need to talk to your server admin for up-to-date credentials and then swap them into your `config.php` file. If the command runs without any problems then you know your credentials are still in good shape. Time to move on to our last resort.

### Force your server to tell you the problem

If you've gone through each of the steps above and haven't found the source of the problem, it's time to just ask the server directly. From your root directory, go into the `__swift/models/Settings/` directory and open up the `class.SWIFT_Settings.php` file.

Scroll down to line 53 and comment it out, by adding `//` at the beginning of the line. It should look like this:

```
// $this->ReplaceLocalCache($_SWIFT->Cache->Get('settingscache'));
```

Save and update the file, and then navigate to your support site. Commenting out that line should display a more detailed error message here on your page. Copy the error message and get in touch with our support team so we can help you resolve the problem.

### Restricting users from setting the ticket priority

'Priority' plays an important role in support teams in streamlining the ticket flow. It speaks a lot about a user's concern and hence Ticket 'Priority' field now comes enabled by default where the customers can define the 'Priority' while submitting a new ticket from Client Support Center.

If you do not require the ticket priority in your support process, you can simply disable ticket priority selection from a direct setting in Admin interface:

For this,

1. Go to 'Admin Control Panel'.
2. Click on **Templates** on the left navigation bar.

3. Click on **Groups** to see the listing.
4. Choose the **Group** you are configuring for.
5. Under the **Settings: Tickets** tab, disable the option next to **User can select a ticket priority**.

The screenshot shows the 'Edit Template Group: Default' window with the 'Settings: Tickets' tab selected. The settings are as follows:

- Default department:** letter requests
- Default ticket type:** Task
- Default ticket status:** Open
- Default ticket priority:** Normal
- User can select a ticket type:** Yes (selected)
- User can select a ticket priority:** No (selected, indicated by a red arrow)

Buttons at the bottom: Save, Cancel.

Screenshot 212: Disable the option next to User can select a ticket priority

6. After this, your customers does not get the option to set the **Priority** while submitting tickets from the client support center.

**Note:**

Customers can still change their ticket Priority after the ticket submission from under the **My Tickets** section on Support Center depending on the configuration at **Admin CP > Users > Manage User Groups**. Choose the **Group > 'Permissions'**. Expand **Tickets'** category and enable **Can change own ticket's status and priority** (it is enabled by default).

The users are restricted successfully from setting their ticket priority.

**Error when sending email replies: 'Client does not have permissions to send as this sender'**

When trying to send email replies, you may encounter the following error message:

## 550 5.7.1 Client does not have permissions to send as this sender.

In this topic, we'll explain the root cause of this error and show you how to quickly fix it.

Unlike a regular mailbox where you use your own username and password to authenticate to the account, outbound emails from GFI HelpDesk either:

- » Use the details from an email queue you've defined in **Admin Control Panel > Email Parser > Email Queues** – for example, `support@[yourcompany].com` or
- » Use the global SMTP details, specified at **Admin Control Panel > Settings > Email**.

### NOTE:

For more details on the types of email addresses used by GFI HelpDesk, see For more information, refer to [Changing outgoing email addresses for automated emails](#) (page 148).

By default, the email queue address is used as the **From** address of the sender. And since the email queue is using its own credentials, the mail server authenticates those details without a problem.

The error occurs when you try to select a different sender. For example, it commonly occurs when a staff user selects their own email address in the 'From' dropdown while updating a ticket. This results in an error because the outbound mailbox does not permit users to send on its behalf. It is commonly associated with Exchange/Office365 accounts which tend to restrict "send as" access by default.

For instance, when a staff user, Joe, replies to a support email, by default it is sent using the 'From' address of the email queue, which, in this case, is `support@[yourcompany].com`. However, if Joe were to select his own email address, `joe@[yourcompany].com`, in the 'From' dropdown, it creates a conflict and subsequently lead to the error since you are authenticating using the `support@[yourcompany].com` credentials but using `joe@[yourcompany].com` to send the email.

## Resolution

To resolve the error, you need to configure **Send as** permissions on your mail server so that staff email accounts can send email using your outbound mailbox account.

The instructions for doing this for some of the more common email servers/providers are listed below:

- » [Office365](#)
- » [Microsoft Exchange](#)
- » [Google Apps](#)

## Using custom field data when customizing email templates

In GFI HelpDesk, it is possible to use custom fields data when customizing email templates. To do so, just like any other type of field, you can use data from custom fields when editing the templates for autoresponders and notification emails. This article provides the details to do so.

- » To specify a custom field as a variable in a template, you'll use the following tag: `<{$_customFields [GroupName] [FieldName]}>`
- » You can then replace **GroupName** and **FieldName** with the actual group and field names for your custom field.
- » GFI HelpDesk then adds that field's data to the email copy.

### NOTE:

Only ticket custom fields can be used in the notifications email templates.

## Valid examples for the GroupName and FieldName

- » **GroupName** – Testing group
- » **FieldName** – Testing, Testing text, Text-area, Select\_value, Testing-123

### Valid template changes are:

```
<{{_customFields[Testing_roup][Testing]]}><br />
```

```
<{{_customFields[Testing_group][Testing_text]]}><br />
```

```
<{{_customFields[Testing_group][Text_area]]}><br />
```

```
<{{_customFields[Testing_group][Select_value]]}><br />
```

```
<{{_customFields[Testing_group][Testing_123]]}><br />
```

For more information, see:

- » [Creating custom fields](#)
- » [Customizing notification emails](#)
- » [Configuring autoresponder emails](#)

## CC recipients allowed on an email in GFI HelpDesk

The topic details the process to configure maximum no of copy recipients to allow in an email from GFI HelpDesk.

The number of email recipients to be captured on a ticket depends upon the Maximum number of recipients in incoming email setting.

This setting is available under **Admin area > Settings > Tickets > Maximum number of recipients in incoming email**.

This is the maximum number of recipients that GFI HelpDesk accepts while processing email.

## Setting a default status for replying to tickets

This topic guides you through the process of setting a default status for replying to tickets.

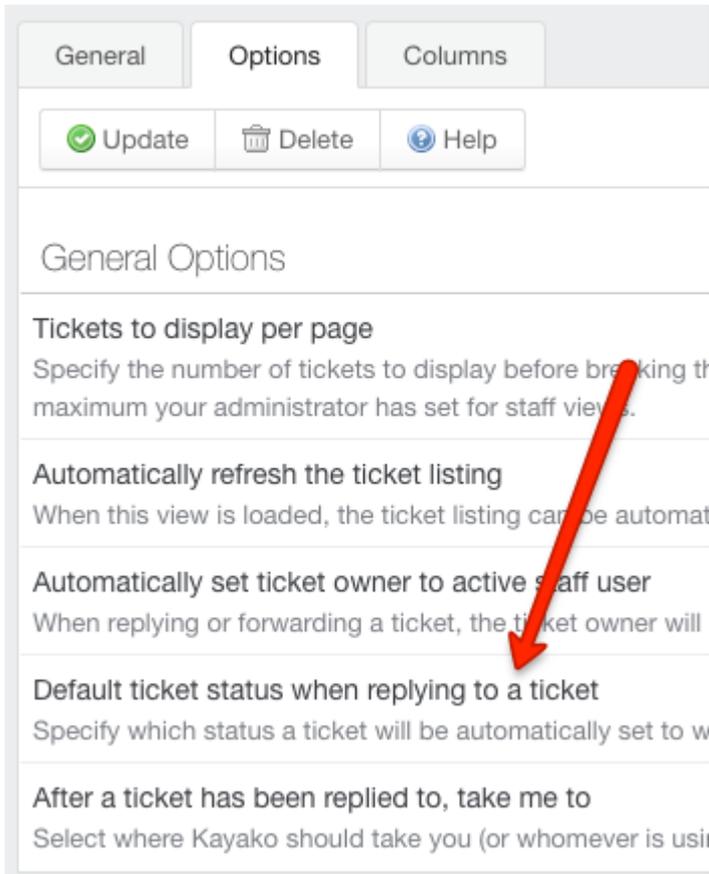
Process

- » When a staff member replies to a support ticket, GFI HelpDesk can update its status, to keep it moving through the customer defined ticket workflow.
- » GFI HelpDesk allows its customers to set a default reply status based on what ticket view the staff member is working from when they reply.

To select or change the default reply status for a view, follow the steps given below:

Select **Tickets > Views** on the staff control panel toolbar.

Open up a view, and switch to the **Options** tab. You'll be able to change the default reply status there as shown in the figure below:



Screenshot 213: You can change the default reply status

## Deleting tickets in bulk for GFI HelpDesk

The topic suggests a solution to delete the tickets in bulk, without causing the database to timeout.

If you try to delete a significant amount of tickets, empty trash with thousands of records or cleanup spam you suddenly got attacked with, your database may probably get timed-out. Instead, you can use the following solution:

1. Update the following PHP Script with applicable **Database Host**, **Database Name**, **Database Username** and **Database Password** for the concerned **MySQL Database**:

```

<?php
$databasehost = "";
$databasename = "";
$databaseusername = "";
$databasepassword = "";
$foundAny = 0;
$con = @mysql_connect($databasehost, $databaseusername, $databasepassword) or die(mysql_error());
@mysql_select_db($databasename) or die(mysql_error());
$result = mysql_query("SELECT ticketid FROM swtickets WHERE date(from_unixtime(dateline)) < '2011-12-31'");
echo "Starting cleanup Process<br />";
while ($row = mysql_fetch_array($result)) {
$foundAny = 1;
$delete = mysql_query("DELETE FROM swticketpostlocks WHERE ticketid = " . $row['ticketid']);
//echo "Deleting: swticketpostlocks Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketlocks WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketlocks Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketlinkchains WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketlinkchains Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketfollowups WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketfollowups Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketdrafts WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketdrafts Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swattachments WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swattachments Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swescalationpaths WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swescalationpaths Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketnotes WHERE linktypeid = " . $row['ticketid']);

//echo "Deleting: swticketnotes Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketauditlogs WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketauditlogs Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketlinkedtables WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketlinkedtables Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketlinks WHERE ticketid = " . $row['ticketid']);

```

```

//echo "Deleting: swticketlinks Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketmergelog WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketmergelog Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketmessageids WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketmessageids Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketnotes WHERE linktypeid = " . $row['ticketid']);

//echo "Deleting: swticketnotes Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketposts WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketposts Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketrecipients WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketrecipients Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swticketwatchers WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swticketwatchers Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swcustomfieldvalues WHERE typeid = " . $row['ticketid']);

//echo "Deleting: swcustomfieldvalues Result:" . print_r ($delete). "<br />";
$result2 = mysql_query("SELECT tickettimetrackid FROM swtickettimetracks WHERE ticketid = " . $row['ticketid']);
while ($row2 = mysql_fetch_array($result2)) {
$delete = mysql_query("DELETE FROM swtickettimetracknotes WHERE tickettimetrackid = " . $row2
['tickettimetrackid']);

//echo "Deleting: swtickettimetracknotes Result:" . print_r ($delete). "<br />";
}
$delete = mysql_query("DELETE FROM swtickettimetracks WHERE ticketid = " . $row['ticketid']);

//echo "Deleting: swtickettimetracks Result:" . print_r ($delete). "<br />";
$delete = mysql_query("DELETE FROM swtickets WHERE ticketid = " . $row['ticketid']);
echo "Deleting: swtickets - " . $row['ticketid'] . " Result:" . print_r($delete) . "<br />";
}
@mysql_close($con);
if ($foundAny == 0) {
echo "No tickets where found within that date range";
}
else {
echo "Ticket Cleanup Complete.";
}
?>

```

2. Backup your database. Make sure you have a valid and latest backup of the database before implementing the solution.
3. Execute the script.

You can edit the following line to match your needs (it currently removes tickets that were created before a certain date):

```
$result = mysql_query("SELECT ticketid FROM swtickets WHERE date(from_unixtime(dateline)) < '2011-12-31'");
```

For example, if you need to delete all tickets from one user:

```
$result = mysql_query("SELECT ticketid FROM swtickets WHERE userid='ID OF YOUR USER'");
```

If you need to remove all tickets from trash:

```
$result = mysql_query("SELECT ticketid FROM swtickets WHERE departmentid=0");
```

## Maintaining the status when users are replying to tickets

The default functionality is for the **Status** to be set to **Open** whenever the customer replies via email.

This topic explains how to update the status change when users are replying to tickets.

1. Go to your **Admin Panel > Tickets > Settings**.
2. Modify the **Set tickets to this status on user reply** option. (The default value for this setting is **Open**.)
3. Change it to **-- Do Not Change --** so that the status persists on every ticket even for email responses.

## Using placeholders

From version 4.75 and later we have added placeholder support for staff replies in our HTML editor. This can also be used within macros to make your predefined responses much more personalized.

Within the reply/forward area, you can use the below placeholders. When the reply is sent, the placeholder is replaced with the information it represents.

### Note:

Placeholders can also be used within the quick insert options, such as macros.

Customers Fullname : {{fullname}}

Customers Forename : {{forename}}

Customers Surname : {{surname}}

Customers Title : {{title}}

Customers Salutation : {{salutation}}

Customers Organization : {{organization}}

Customfield : {{custom\_field[CustomFieldName]}}

## Changing the color of overdue tickets

This topic provides relevant information on how to change the background color of overdue tickets.

You can change the color of the overdue tickets to differentiate them from the other ones by navigating to **Admin CP > Tickets > Settings > Overdue ticket background color**, under the **Select a color option**; this changes the background color for the overdue tickets to the color you select.

## SLAs not being applied the same way to all the tickets

If you have set up an SLA but it is not being applied to tickets the way you would expect, there may be a conflicting SLA that is causing this behavior.

In addition to creating team-wide SLAs, you can also define SLAs for specific users or organizations that overrides the regular SLA rules. Any criteria and escalations defined for a particular user or organization takes precedence over the criteria in the general SLAs.

You can manage a user or organization's SLA override from the bottom of their Profile tab in the staff control panel:

**SLA Plans**

**SLA plan override**  
An SLA plan specified here will override other SLA plan rules and all tickets created by this user will be assigned this SLA plan. -- Default SLA Plan --

**SLA plan override expires on**  
When the SLA plan expiry date is reached, the SLA plan override above will be removed. Leave blank to never expire.   

Screenshot 214: SLA plans

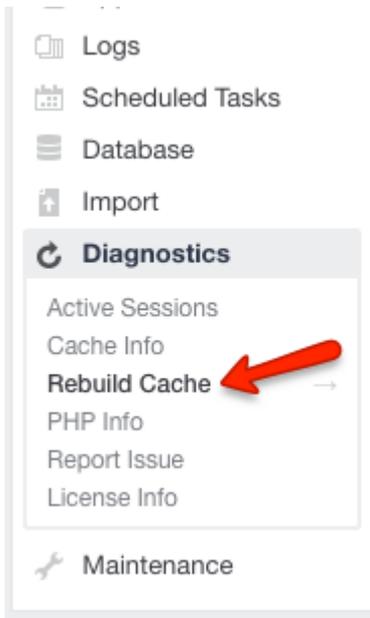
## Error: Invalid Core Data

When this error appears, it means that Kayako could not find one of the expected values for a 'core' ticket fields – **Department, Status, Priority, or Type**.

Basically, if you or someone on your team has deleted one of the available values for any of those fields, it can cause this error to appear.

To fix it, there are a couple of options:

- » If you know which value was deleted, and which template group or email queue that value was related to, you just need to save a fresh copy of the template group or email queue. Go to the page for the template group or queue, and (without making any changes) click the Save or Update button.
- » If you're not sure which value was deleted, you need to go through and save a fresh copy of all of your template groups and email queues. As mentioned above, you just need to go to the page for the template group or queue, and (without making any changes) click the **Save** or **Update** button.
- » If you're still running into problems, try rebuilding the cache. From the **Admin Control Panel**, got to **Diagnostics heading** and click the **Rebuild Cache** link.

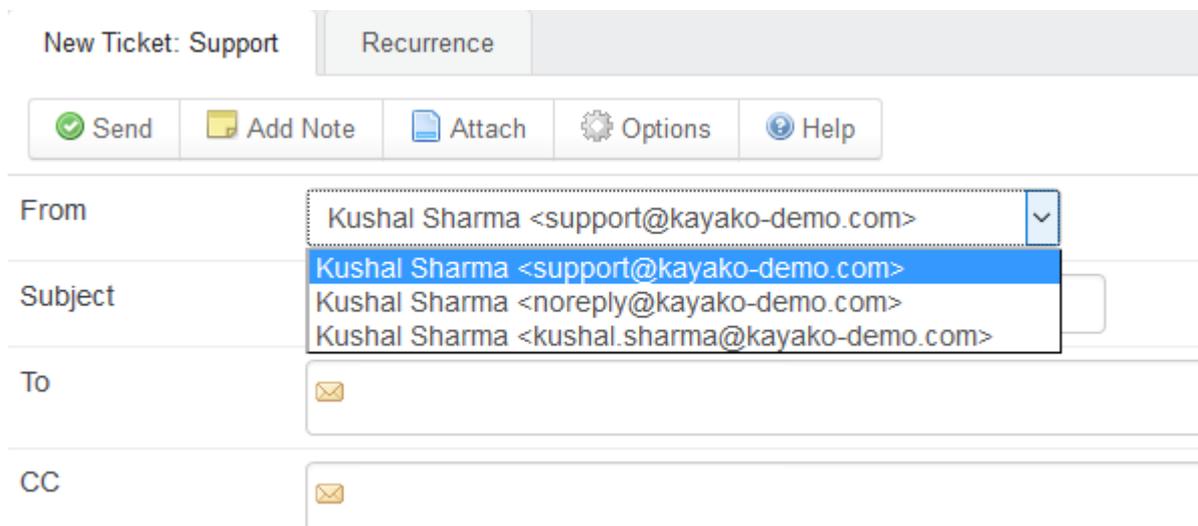


Screenshot 215: Rebuild cache

## Editing the list of 'From' email addresses that appears when replying to a customer

When you are communicating with your customers, the email address your messages are coming from can play an important role. For example, you may want to use different email addresses for different groups of customers, depending on the type of request they submit or which support site they submitted through.

When creating or replying to a ticket from the staff control panel, you see multiple email addresses in the **From** dropdown, as shown below:



Screenshot 216: Multiple email addresses displayed

This list only has three email addresses to choose from. Your GFI HelpDesk may have more. Regardless of how many there are, though, the email addresses always appears in the same order:

- » Email queue addresses come first. The addresses for any email queues you have set up that apply to this ticket appears first in the dropdown list.
- » The second to last email is always your default support address. You can change this address from the 'admin control panel' by clicking Settings and the General in the 'menu' sidebar.

» The final address on the list is the email address for your staff account. You can change this address from the admin control panel by clicking Staff on the main toolbar and then **Manage Staff** and editing the address on your profile.

**Note:**

We suggest replying with one of your email queue addresses to ensure that all of your responses are tracked for that ticket.

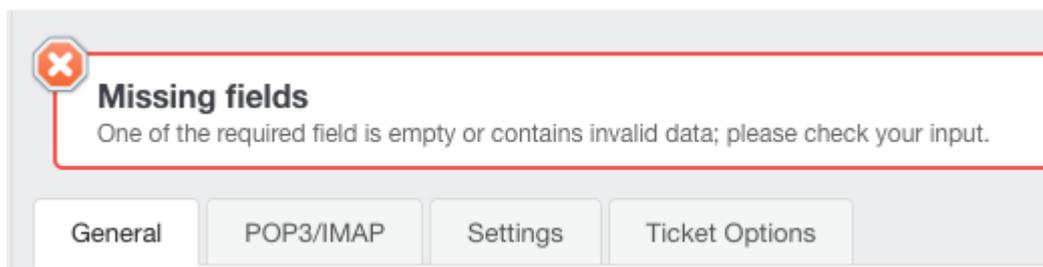
### Why can I see only two email addresses in the 'From' list?

If you are seeing only two email addresses in the 'From' dropdown list, it means you have not configured an email queue address that applies to that ticket. The default address and your staff address is always listed in the dropdown.

For more information, refer to [Introduction to email queues](#) (page 131).

### Error : 'Missing fields one of the required field is empty or contains invalid data' when editing the properties of an email queue

Sometimes, when editing the properties of an email queue in GFI HelpDesk, you'll encounter the following error **'Missing fields one of the required field is empty or contains invalid data; please check your input.'**



Screenshot 217: Missing fields

### Resolution

1. Navigate to the **Ticket Options** tab for the email queue.
2. Any of the fields like (Department, Ticket Type, Status, and Priority) missing a valid value is highlighted.

### Ticket Properties

<b>Department</b> New tickets created from email sent to this queue will be created in this department.	Sales
<b>Ticket type</b> This ticket type will be used for new tickets created from email sent to this queue.	none
<b>Status</b> New tickets created from email sent to this queue will be set to this status.	Open
<b>Priority</b> New tickets created from email sent to this queue will be set to this priority. This is not related to email priority.	TEST

Screenshot 218: Ticket properties

3. In the example scenario depicted, the **Ticket Type** is missing. It is not there as all types are linked to other departments.

4. Select a Ticket Type that is not linked to any department or a **Ticket Type** that is linked to the department associated with the queue to resolve this sample scenario.
5. In general, select another valid value for the highlighted field.
6. Click the **Update** button.

The error message should no longer appear.

## Backing up templates

For sharing, reference, or simply peace of mind – it is useful to make local copies of any GFI HelpDesk templates that you have modified.

This article guides you on how to back up your templates.

### Saving a Local Copy of Your Modified Templates

1. Log in to Admin Control Panel, click the Templates sidebar heading, then select the Templates link under that.
2. Open one of the Template Categories, and then look for any templates that have been modified:

● email_ticketstaffreplytext	Original
● email_ticketstaffreplyhtml	Original
● email_ticketforwardtext	Original
● email_ticketforwardhtml	Original
● email_ticketuserreplytext	Modified
● email_ticketuserreplyhtml	Original
<b>Troubleshooter</b>	Expand
<b>News</b>	Expand
<b>Knowledgebase</b>	Expand
<b>Live support</b>	Expand

Screenshot 219: Look for a modified template

3. Click the template to open it, and select the entire content:

```

Template Contents

<{$_userReplyText}>

<(if $_settings[t_enhistory] == 1 && $_isNewTicket == false)>
<{$_language[tickethistory]}>
=====
<(foreach key=key item=_ticketPost from=$_ticketPostList)>
<(if $_ticketPost[ticketpostid] != $_ticket[lastpostid])>
<{$_ticketPost[fullname]}> <{$_ticketPost[creator]}> <{$_language[thpostedon]}> <{$_ticketPost[date]}>

=====
<{$_ticketPost[contents][0]}>

</if>
</foreach>
<{$_userReplyText}>

</if>
<{$_language[ticketdetails]}>
-----
<{$_language[articketid]}><{$_ticket[displayticketid]}>
<{$_language[ardepartment]}><{$_ticketDepartmentTitle}>
<{$_language[artype]}><{$_ticketTypeTitle}>
<{$_language[arstatus]}><{$_ticketStatusTitle}>
<{$_language[arpriority]}><{$_ticketPriorityTitle}>

<{$_language[supportcenterfield]}> <{$_basePath}><{$_templateGroupPrefix}>

```

Screenshot 220: Select the entire content

4. Copy and paste the content to your text editor.

You can save these files wherever you like, and refer to them later, as needed.

### Changing the global page limit for ticket views

Every time someone on your team creates a ticket view, they choose how many tickets to display per page. But in the admin control panel, there is also a global setting on how many tickets can be displayed per page, in any view across your helpdesk.

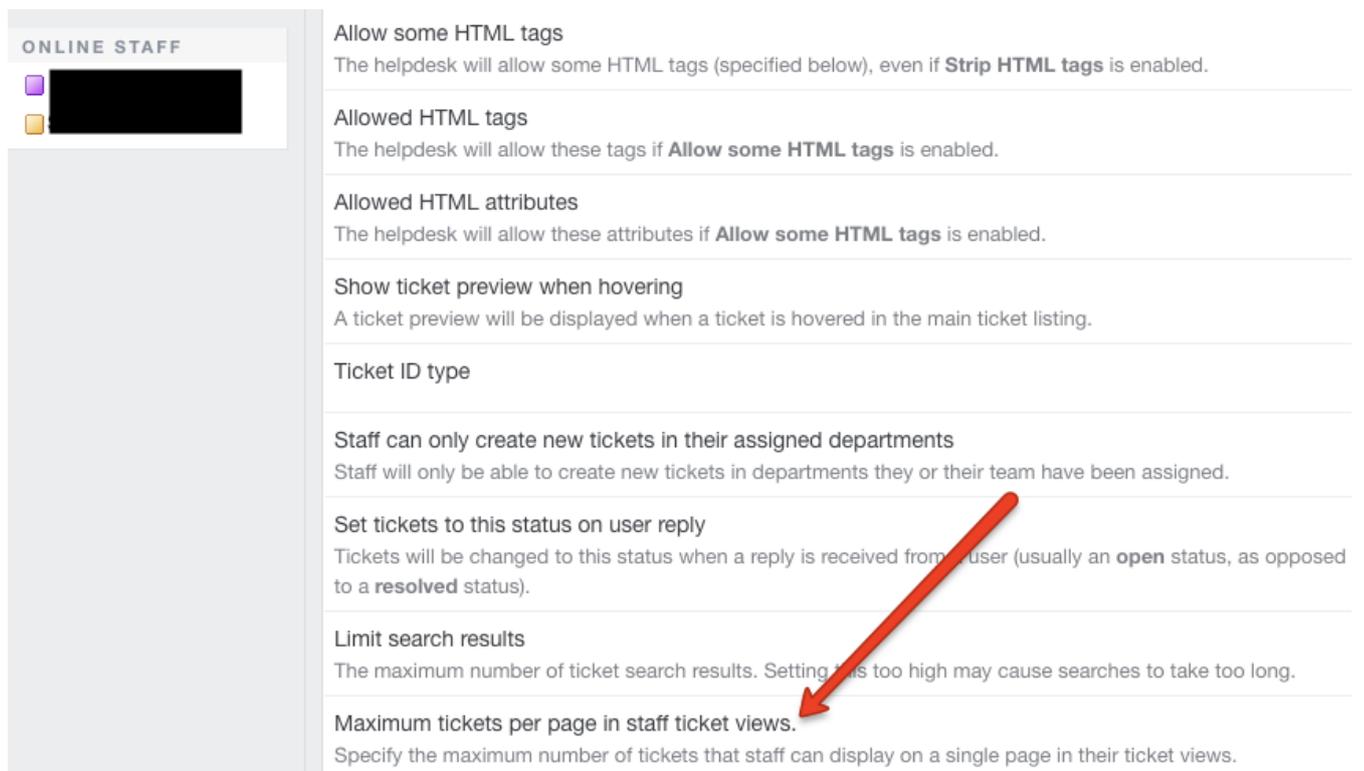
If the tickets per page value for a particular view is higher than the global page limit, the person creating the view gets an error message saying their limit exceeds the global limit for your helpdesk.

They can either adjust the limit on their view or, if needed, you can adjust the global limit.

To edit the global page limit:

1. Navigate to the **Admin Control Panel**.
2. Select **Tickets > Settings** in the sidebar.
3. Scroll down to find **Maximum tickets per page in staff ticket views**.

4. Select a limit.
5. Save changes.



Screenshot 221: Set the maximum number of pages per page in staff view

## Entered email same as customer email error

You may get this error while trying to update your existing email queues.

### The email you entered is the same as your customer email.

GFI HelpDesk does not allow you to add the same email address as an email queue and as an end user. To fix this, you are requested to delete the user account associated with this email.

To delete the user account, navigate to **Staff Control Panel > Users > Manage Users > Search** and open the account of the user with that email address and click on **Delete**.

After deleting the user account, you can then edit and update the **Email Queue**.

## Showing empty view when searching for tickets

The Ticket List View shows empty results when trying to search for tickets.

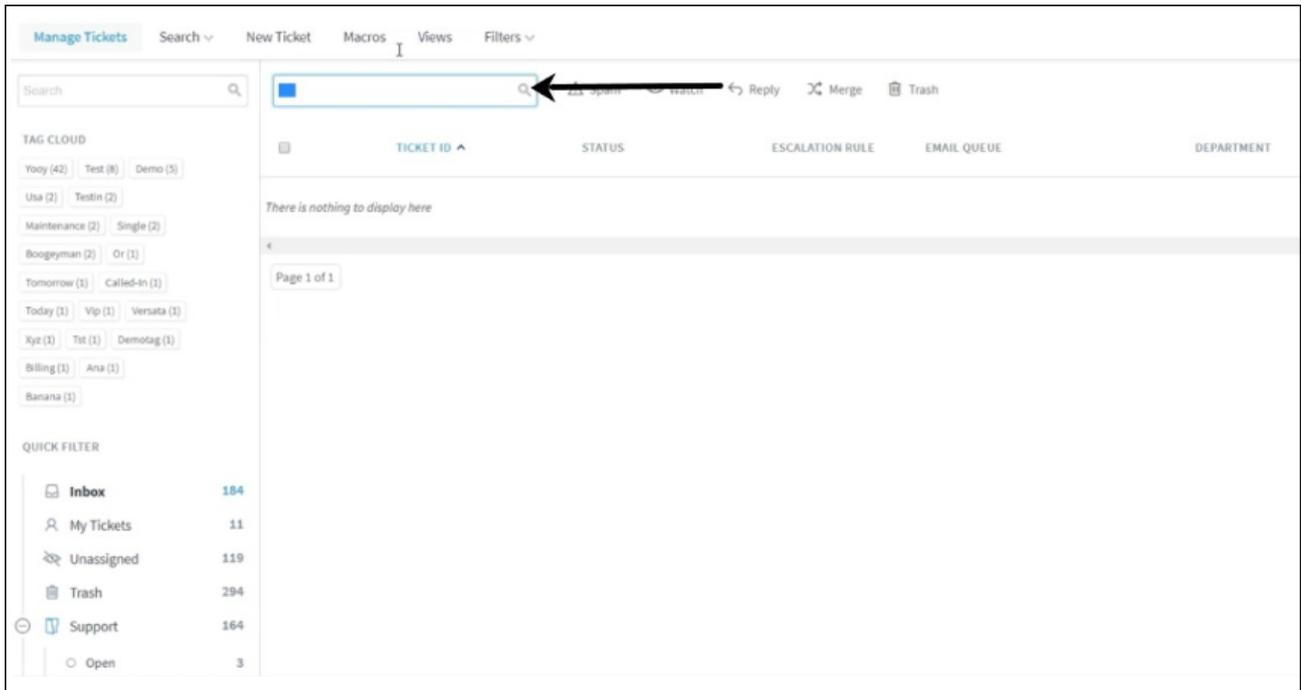
The message below comes out:

### There is nothing to display here.

The most common cause is the **whitespaces** within the search bar.

To resolve:

1. Click the **Quick Search bar** above the Ticket List view.
2. Remove the whitespaces.



Remove whitespaces

### Enabling breaklines in the ticket thread

GFI HelpDesk handles the ticket content internally, including user and staff replies as HTML.

But how it is displayed is configured with these settings:

- » HTML handling (on the web and in email notifications)
- » HTML handling (for staff replies)

This topic explains how to enable break lines in the ticket thread.

### Environment

GFI HelpDesk 4.93 and later

### Process

1. Enable **TinyMCE Editor**. (If disabled, go to **Admin Control Panel > Tickets > Settings** to enable it.)
2. Adjust ticket settings:
  - » **Admin Control Panel > Email Parser > Settings** - Prioritize email content type = HTML
  - » **Admin Control Panel > Tickets > Settings > HTML handling** (on the web and in email notifications) = Allow HTML
  - » **Admin Control Panel > Tickets > Settings > HTML handling** (for staff replies) = Allow HTML

### 5.11.3 Other issues

Refer to the following topics for resolving other issues and contacting our support team.



## Publishing news from other sites to own support site

This topic guides you on how to fetch and publish news from other sites to your own support site.

1. Go to **Admin CP > News > Settings > Synchronization Settings**.

2. Insert the **RSS** link location under *Global News RSS URL setting*.

The RSS feed from the mentioned link is synchronized when `News Synchronization` cron runs at your helpdesk.

By default, `News Synchronization` cron runs after every 30 minutes. This can be administered through **Admin CP > Scheduled Tasks > Manage**.

## User subscription to news articles

This topic presents valuable information regarding subscription to news articles.

- » The users can subscribe to any news articles you publish by inserting their email addresses after clicking on **Subscribe** option available next to login box.
- » For unsubscribing from a specific section, for example, News section, the user can click on the **unsubscribe** link that they receive in the email when they confirm their subscription.
- » In case the end users have lost that email, then they need to contact GFI HelpDesk to unsubscribe from News.

## Is Kayako Desktop available for non-Windows devices (for example, Mac)?

Yes!

Kayako Desktop for Mac is a native OS X application for managing live chats with your customers. For instructions downloading and installing, please refer to the Handling Chats with [Kayako Desktop for Mac](#).

## Changing the GFI HelpDesk admin email address

This topic provides the step-by-step process to change the Kayako admin email address.

You can change the GFI HelpDesk admin email address by performing the following:

1. Choose **Admin CP > Staff > Manage Staff**.
2. Select the staff member.
3. In the **General** tab, change the email address.
4. Click **Update**.

You can request another admin user to change this for you if you are not able to log in. If you are the only admin and cannot remember your password, please refer to the [FAQ on changing your password](#).

## Resetting the support center password

This topic explains how to reset the **Support Center** password.

You can reset your **Support Center** password using the **Lost Password** option under the **Login** field on the **Home** page. You receive the password by email.

## Maximum number of registered users allowed on a support site

This topic explains the maximum limit on the number of registered users on a support site.

You can support as many end users from the **Support Center**. There is no restriction on this count.

## Disabling the user registration form on support site

This topic addresses the possibility of disabling the User Registration form on a Support Site.

In GFI HelpDesk, you can disable the User Registration form on a Support Site. You can stop people from registering at the Support Center by deactivating the **Register Widget** by navigating to **Admin CP > Widgets > Register Widget**, and selecting **No** for the **Is Enabled** option.

### Note:

Users are automatically registered when they log their first ticket or initiate their first chat from your Support Center.

## 6 Glossary

### A

#### **Active directory**

A directory service for Windows domain networks.

### G

#### **Greylisting**

Greylisting is an antispam method that temporarily rejects messages from unknown senders.

### H

#### **HTTP**

Hypertext Transfer Protocol - A protocol for exchange of hypertext documents in HTML.

#### **HTTPS**

Secure version of secured by SSL.

### I

#### **IM**

Instant Messaging - A real-time online chat.

#### **IMAP**

Internet Message Access Protocol - One of the two most commonly used Internet standard protocols for e-mail retrieval, the other being POP3.

#### **Instant Messaging**

Instant messaging is a real-time online chat.

#### **Internet Service Provider**

An organization that can provide Internet service.

#### **IP address**

An identifier assigned to devices connected to a TCP/IP network.

#### **ISP**

Internet Service Provider - an organization that can provide Internet service.

### K

#### **Kerberos**

An authentication protocol for client/server applications.

## M

### **MX record**

Mail Exchanger record is a record in DNS that specifies which server handles email messages.

## N

### **NNTP**

Network News Transfer Protocol - A transfer protocol for discussion groups over the Internet.

### **NTLM**

NT LAN Manager - Security protocols that provide authentication for Windows networks.

## O

### **Open directory**

A directory service for Apple based networks.

## P

### **PCI DSS**

Payment Card Industry Data Security Standard - A set of security standards for organizations to securely process and store data of credit cards.

### **POP3**

Post Office Protocol 3 - A protocol used by local email clients to retrieve emails from mailboxes over a TCP/IP connection.

### **Public folder**

A common folder that allows users to share information.

## R

### **regular expression**

Enables to define a sequence of characters that specify a search pattern.

### **root certificate**

A certificate issued by a trusted certificate authority (CA). In the SSL, anyone can generate a signing key and sign a new certificate.

## S

### **S/MIME**

Secure/Multipurpose Internet Mail Extensions - Email protocol based on SMTP used to digitally sign and encrypt messages.

**SMTP**

Simple Mail Transport Protocol - An internet standard used for email transmission across IP networks.

**SNMP**

Simple Network Management Protocol - A protocol for gathering and organizing information about devices in IP networks, and changing devices behavior.

**SPF**

Sender Policy Framework is an open source equivalent to Caller ID.

**SRV record**

Service record is a record in DNS that specifies the location of server for individual services.

**SSH**

Secure Socket Shell - A network protocol that provides administrators with a secure way to access a remote machines.

**SSL**

Secure Sockets Layer - A protocol that ensures integral and secure communication between networks.

**SSL certificate**

SSL certificates are used to authenticate an identity on a server.

**T****TCP**

Transmission Control Protocol - ensures packet transmission.

**TLS**

Transport Layer Security - A follower of the SSL protocol and ensures secure communication between networks.

**U****UNC path**

A standard that specifies the location path of a network resource.

**URL**

Uniform Resource Locator is the address of a web page on the world wide web.

**W****WebDAV**

Web Distributed Authoring and Versioning is a framework that enables users to work with documents on a server.

## **X**

### **XMPP**

Extensible Messaging and Presence Protocol is a protocol used for real-time communication (chat).