WP EZ Ticketing
USER'S GUIDE

WP EZ Ticketing Documentation

WP EZ Ticketing is a wordpress plugin designed to enable ticket system integration directly on your site to manage client inquiries and concerns. This is specifically useful when you are running an ecommerce or a membership site wherein your customer(s) can contact you regarding the products and/or services you offer while keeping track of it at the same time.

Note: WP EZ Ticketing comes with a lite version. However, the option to add Knowledgebase and Troubleshooter entries will not be available.

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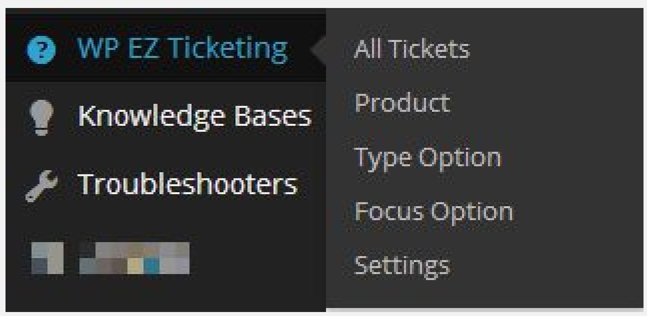
How to Use WP EZ Ticketing

This guide assumes that you already have logged in to your wordpress admin area and successfully installed and activated **WP EZ Ticketing**.

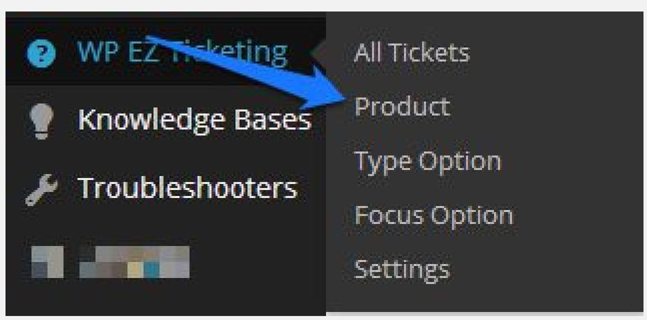
The plugin offers 2 working interface. The one is for the admin or staff and the other is for the user.

How to Use WP EZ Ticketing as Admin

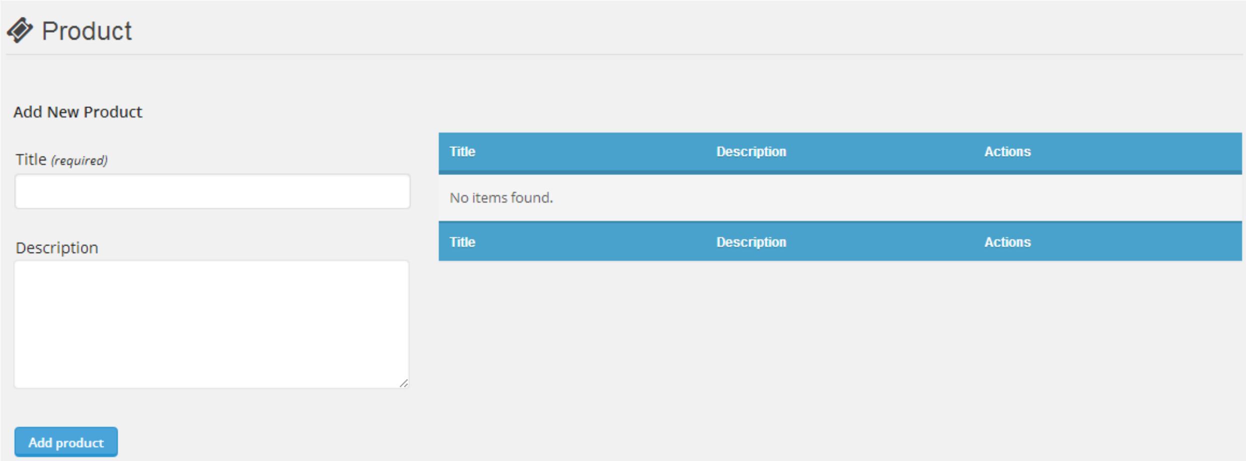
1. Click or hover your mouse on **WP EZ Ticketing** menu item from the left wordpress admin panel to display the options.



2. For starters, click **Product** so you can add in the first product you will be providing support with using the ticket system.



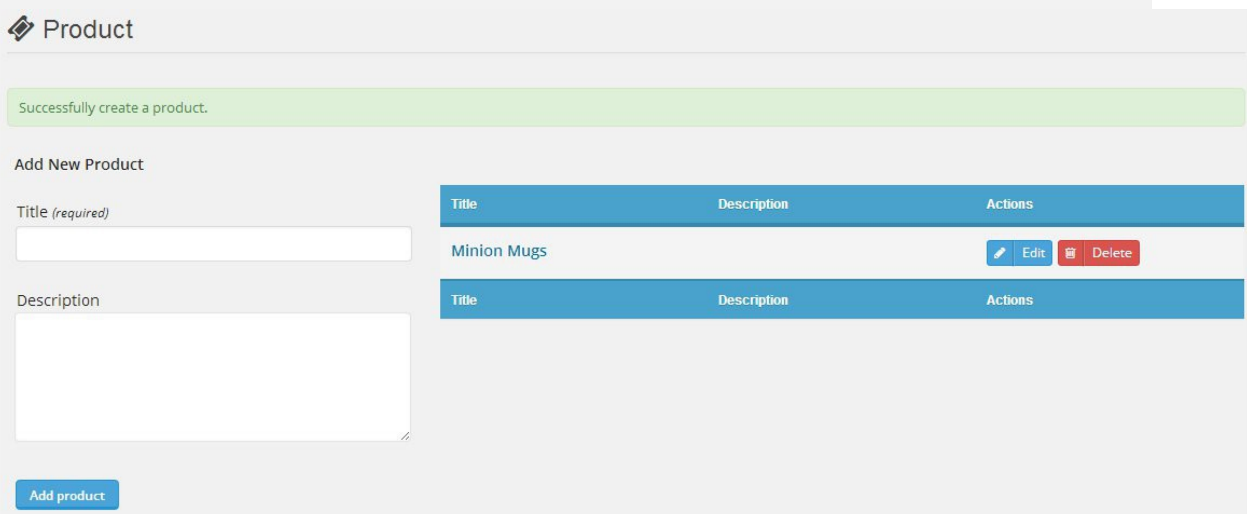
3. You should then see a page similar to the image below.



How to Add Product

1. To add a product, simply enter the required title or the name of the product on the designated field. The description field is optional. Once done, click **Add Product** button to save and confirm the product addition.

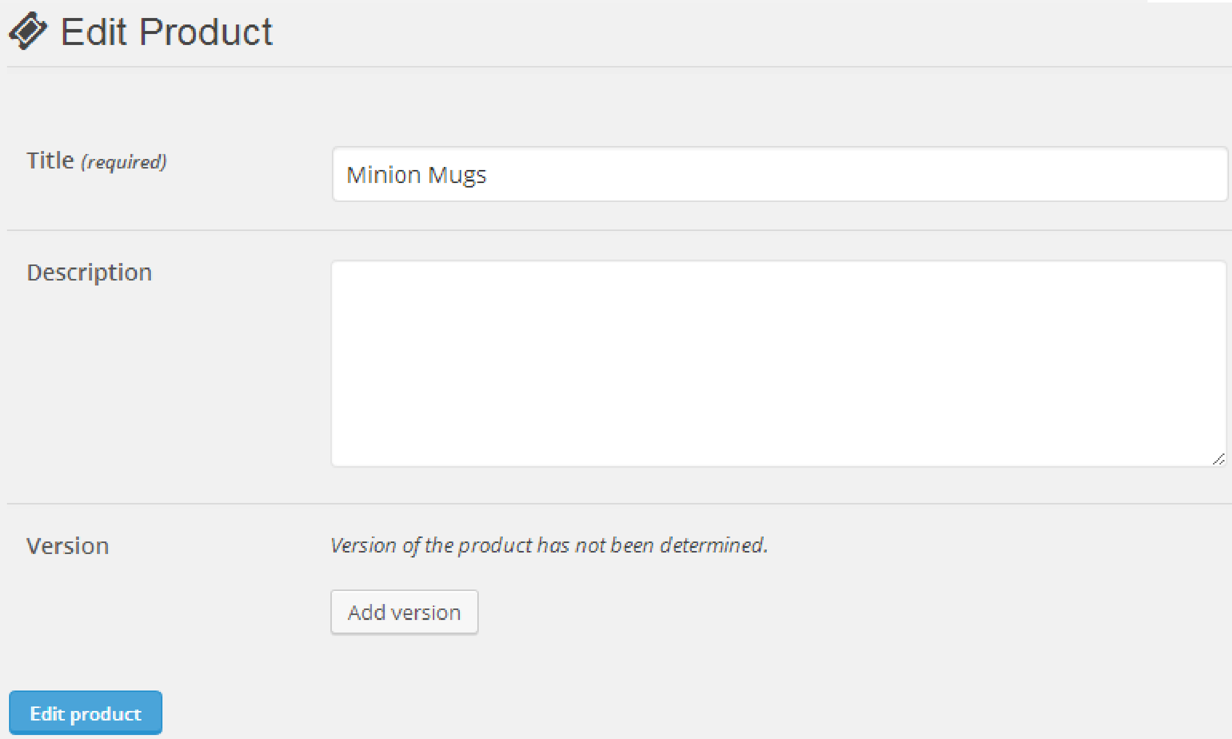
2. Once a product has been created successfully, the table will then be updated with the new entry. In addition, options to manage your entries will also be available. Please refer to the following screenshot.



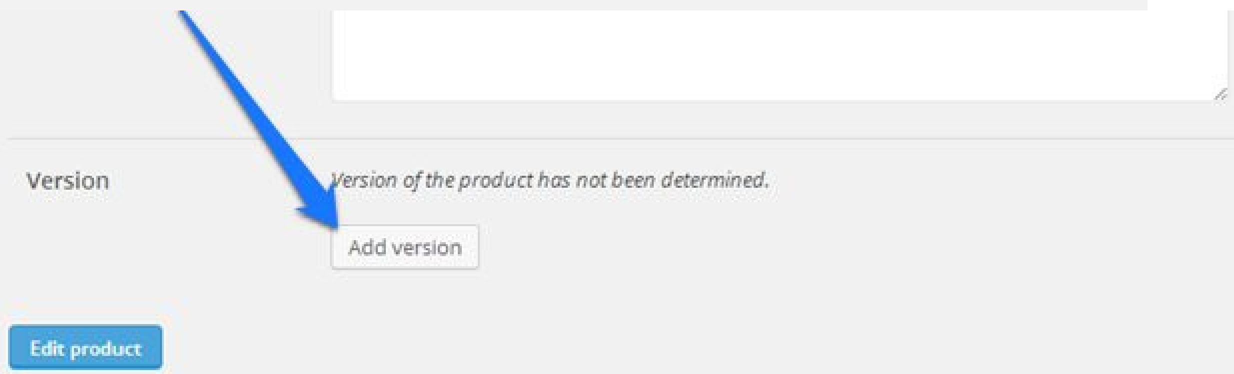
How to Edit a Product

1. To edit a product, simply click the blue edit button. This should then take you to the edit product page where you can make the

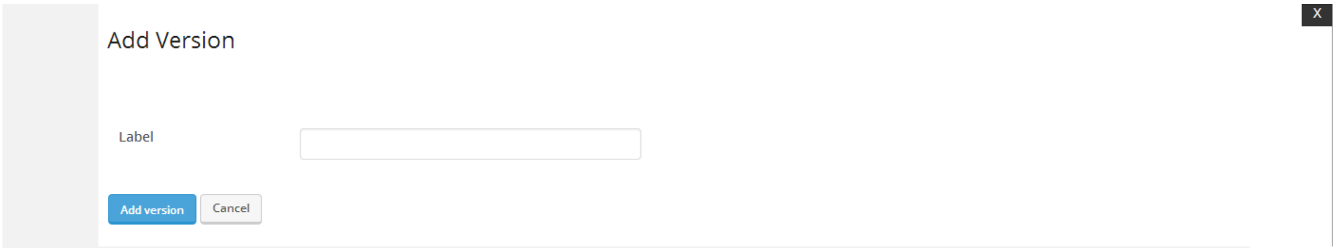
necessary modifications on the product's data and that includes adding the product's version.



2. To add the version of the product, simply click the **Add Version** button.



3. This will then display a popup where you enter the product's version.



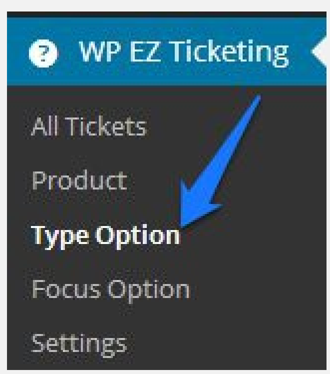
4. Once done, click the **Add Version** button. Then, the popup will automatically close. Notice that once you have added a version, additional options to manage it will be available. Click edit to make the necessary changes on the product's version or click delete if you would like it removed. **Note**: A version should be entered as this is required when a user submits a ticket.

5. Finally, click **Edit Product** button to save the changes you made.

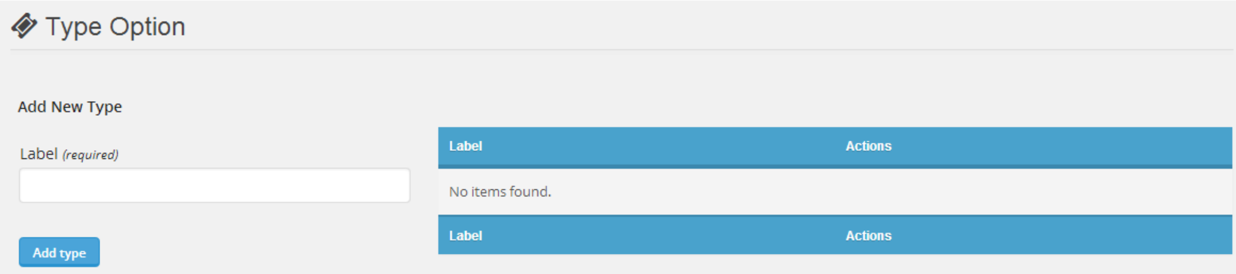
How to Delete a Product

1. Deleting a product is as easy as clicking the red delete button. **Note**: You will not be prompted to confirm the action and once you have clicked on the button it will immediately remove the product from the list.

4. After you have setup the product(s) your ticket system will be supporting, you would then have to add **Type Option** next. Type Option is used by the user seeking support to specify which department is the inquiry or concerns belong to. To do so, simply click Type Option just below Product as shown in the screenshot.



5. This will then take you to the Type Option page where you can add and manage type options.



How to Add Type Option

1. The only that is required for you to provide information is the label of the type options.

2. When you are through adding the label, click **Add Type** button to save it. It will then be automatically added on the table located on the right side of the page.

After you add a type option, you will notice that on the table you will find the list of the type options with corresponding buttons under the action column.

How to Edit Type Option

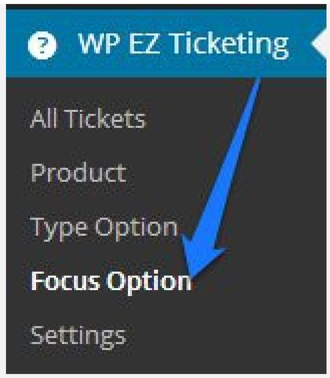
1. To edit a type option, simply click the blue edit button which will take you to the edit type page where you can make the necessary changes you like on the label.

2. After finalizing the changes, click the **Edit Type** button to save.

How to Delete Type Option

1. Deleting a type option is as easy as clicking the red delete button. **Note**: You will not be prompted to confirm the action and once you have clicked on the button it will immediately remove the type option from the list.

6. Once you are done adding type options, you will have to create **Focus Option** next. Focus Option gives the user seeking support to further specify the concern or issues experienced. To add and manage focus option, click Focus Option.



How to Add Focus Option

1. When adding focus option, just like type option you are only required to enter one required field which is the label.

2. After typing in your focus option's label, click **Add Focus** to save and add. It will then be automatically added on the table located on the right side of the page.

After you add a focus option, you will notice that on the table you will find the focus option(s) created with corresponding buttons under the action column.

How to Edit Focus Option

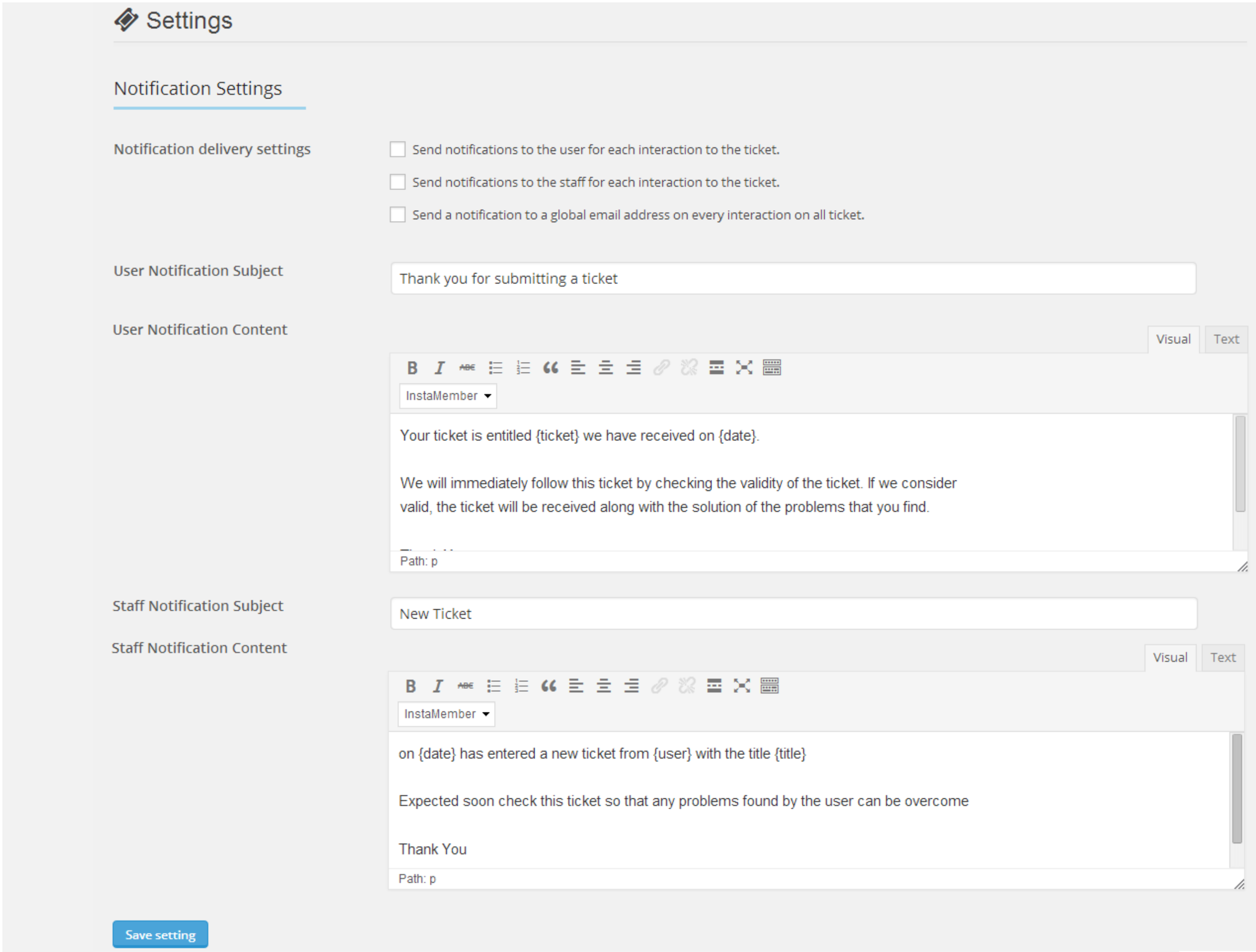
1. To edit a focus option, simply click the blue edit button which will take you to the edit focus page where you can make the necessary changes you like on the label.

2. When you are through, click **Edit Focus** button to save the changes made.

How to Delete Focus Option

1. Deleting a focus option is as easy as clicking the red delete button. **Note**: You will not be prompted to confirm the action and once you have clicked on the button it will immediately remove the focus option from the list.

7. Finally, the last option (you can optionally configure) is the **Settings** of your ticket system. Click Settings just below Focus Option to configure the options according to your preferences. Once clicked, you should see a page similar to the image below.



- **Notification delivery settings**. Tick the checkbox applicable to your preference on how you would like the staff and the users to be notified for every interaction made on the tickets.

- **User Notification Subject**. Enter in this field the subject of the email notification the user will receive when an interaction has been done on the ticket submitted.

- **User Notification Content.** Enter in this field the message of the email notification for the user when the ticket submitted has been updated.

- **Staff Notification Subject.** Enter in this field the subject of the email notification the staff(s) will receive when an interaction has been done on ticket(s).

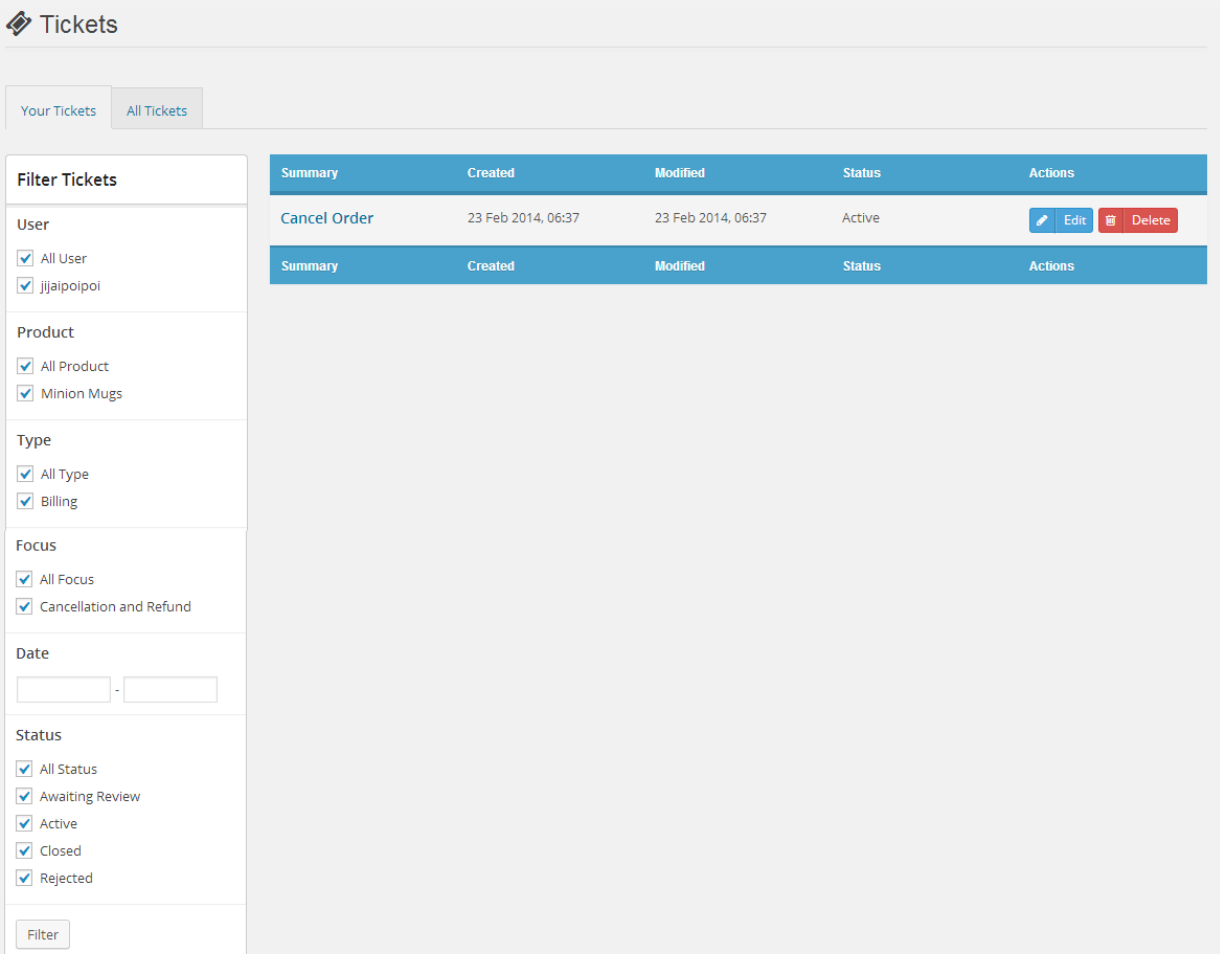
- **Staff Notification Content.** Enter in this field the message of the email notification for the staff(s) when ticket(s) submitted have been updated.

- **Save Setting.** This button saves the changes made on the notification settings.

How to Manage the Tickets

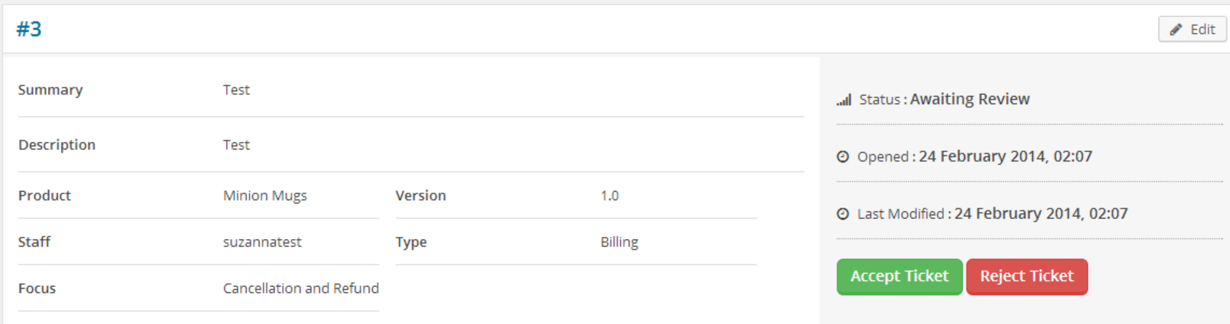
1. Upon completing the settings for the ticket system, you may now be able to receive, review and respond to tickets that users will submit. To do so, click WP EZ Ticketing menu item from the left admin panel or hover your cursor over the menu item and click **All Tickets.**

2. Once clicked, you will be taken to the All Tickets page where all tickets submitted by the users are listed. By default, **Your Tickets** tab will be active. All Tickets tab lists down all tickets designated to you. All Tickets on the other hand lists down all ticket regardless of who it is assigned to. Both tabs display the filter tickets section on the left side and the list of tickets submitted in table form on the right side.



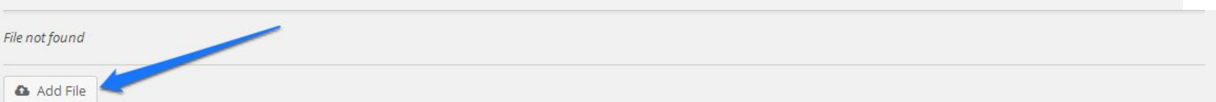
How to Edit a Ticket

1. To respond to a ticket, click the blue edit button. Notice that all tickets submitted will be received as pending review and you have the option to accept or reject the ticket.

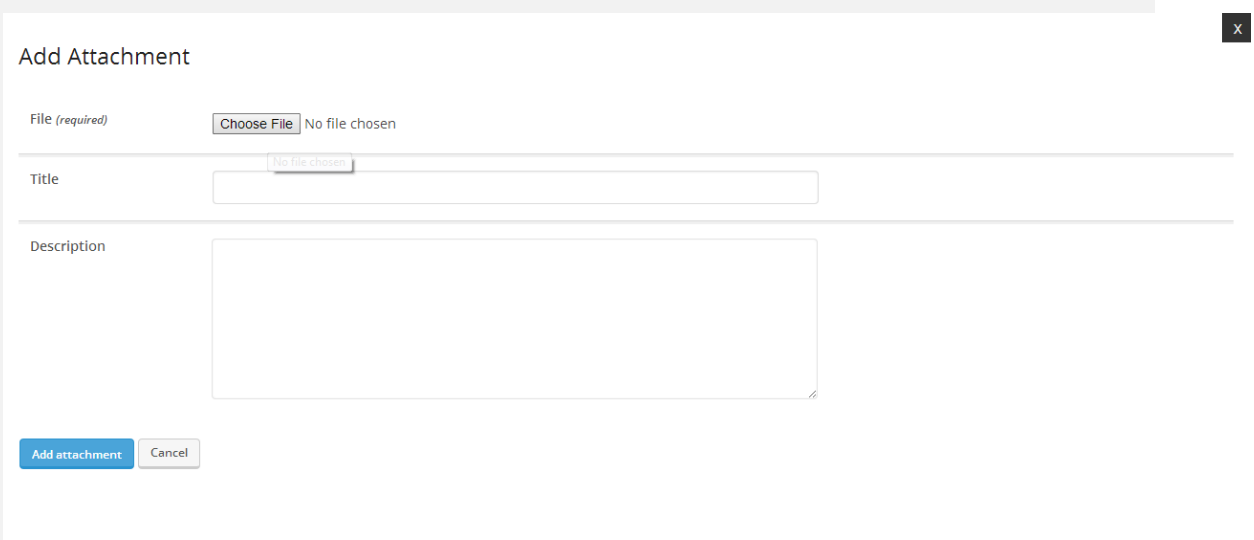


3a. How to Add an Attachment

1. To add an attachment on the current ticket, simply click the **Add File** button.



2. The button will trigger the display of a popup where you can upload the file and add the necessary information with it such as title and description.

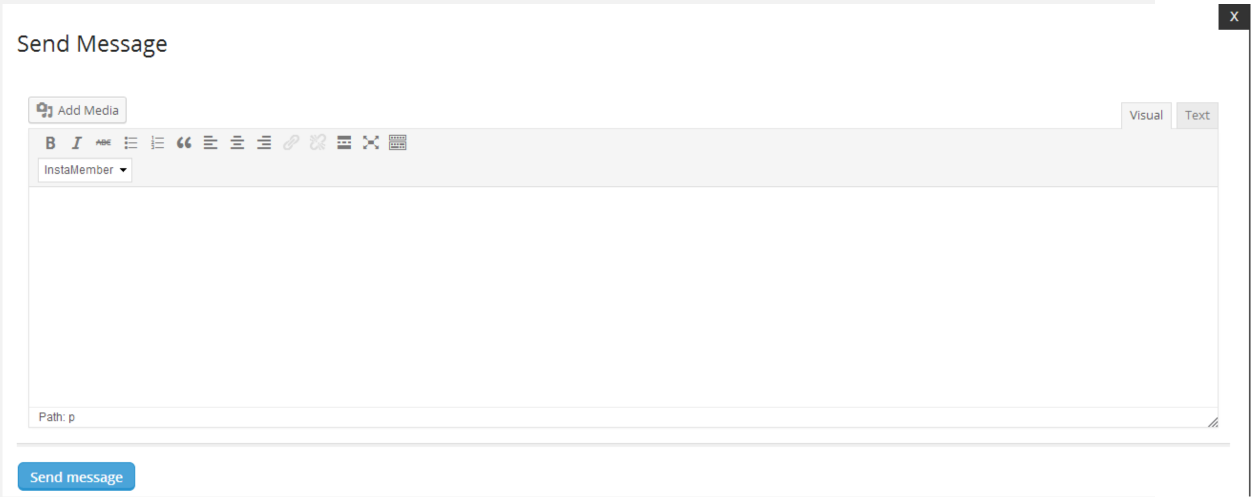


3. Once finalized, click the **Add Attachment** button.

3b. How to Send a Message

1. To send a message to the user, click the Send Message button located on the bottom of the page.

2. This will then trigger a popup where you can enter your response to the user. Once done click **Send Message** button.



How to Delete a Ticket

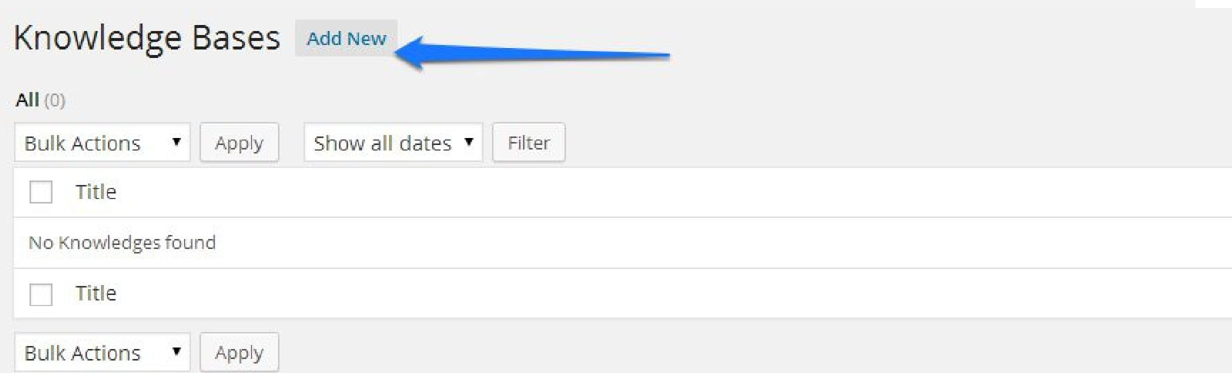
1. Deleting a ticket is as easy as clicking the red delete button.
   Note: You will not be prompted to confirm the action and once you have clicked on the button it will immediately be removed from the list of tickets submitted by the users to the system.

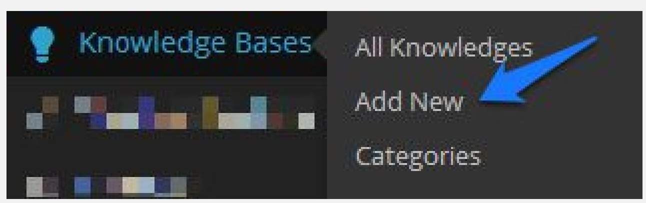
How to Manage Knowledgebase

The knowledgebase is where you can add information of users' frequently asked questions. This feature is only available when using the full version of WP EZ Ticketing.

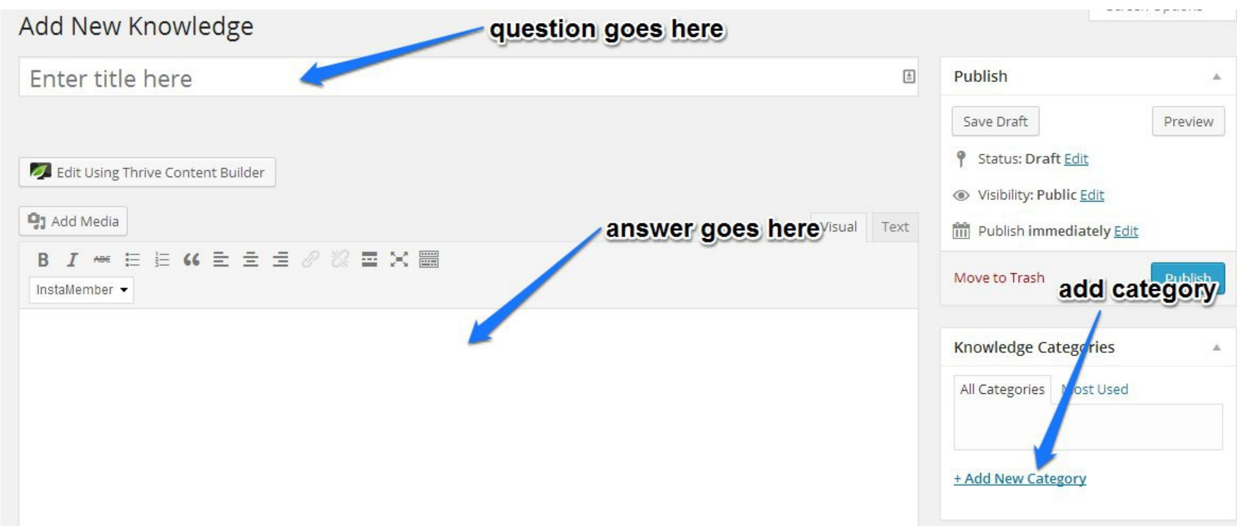
How to Add Knowledgebase

1. To add a new knowledgebase, click the **Knowledge Base** menu item from the left admin panel then click **Add New** or hover your cursor over the menu item to display the available options then click **Add New**.





2. You should then be taken to the Add New Knowledgebase which is quite similar to the default wordpress page/post editor. Add in the first field the question and on the editor, enter the answer to the question. You may as well add it on a specific category through the Knowledge Categories section on the right side of the editor.

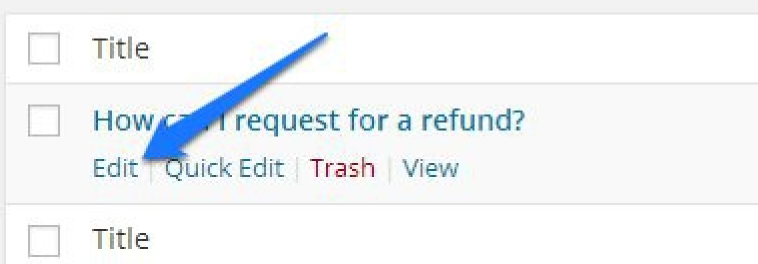


3. Once you have finalized your entry, click **Publish** button to save and make the entry go live.

How to Edit Knowledgebase Entry

1. To edit a knowledgebase entry, simply click the **Knowledge Bases** menu item from the left admin panel or hover your cursor over the menu item then click **All Knowledges**.

2. You should then be taken to the **All Knowledges** page where all entries are listed. Click the one you would like to edit. Or you can hover your cursor on the entry's row then click the edit link.

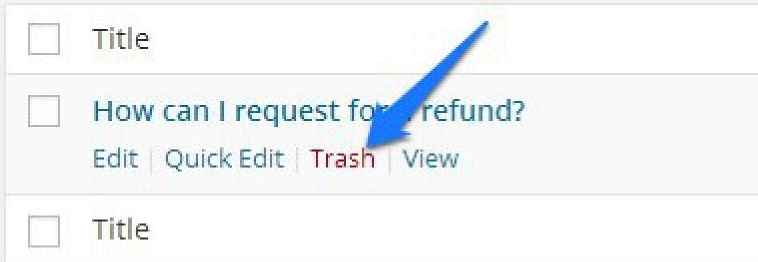


3. To check how the entry looks like live on the site, click the **View** link.

How to Delete Knowledgebase Entry

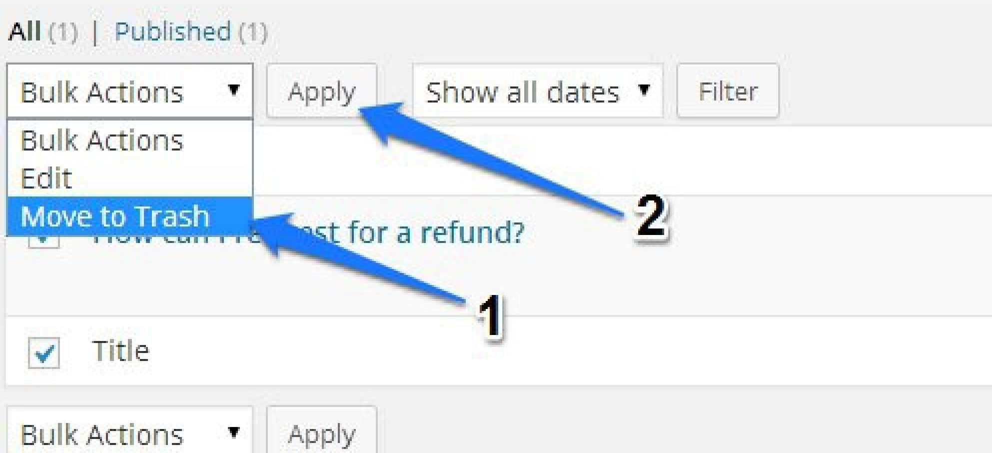
1. To delete a knowledgebase entry, click the **Knowledge Bases** menu item from the left admin panel or hover your cursor over the menu item then click **All Knowledges**.

2. You should then be taken to the **All Knowledges** page where all entries are listed. Hover your cursor on the entry's row then click the **Trash** link.



3. If you would like to delete multiple entries, all you need to do is tick the checkbox just beside each entry's title.

4. From the bulk actions dropdown, click **Move to Trash** option and then click **Apply.**

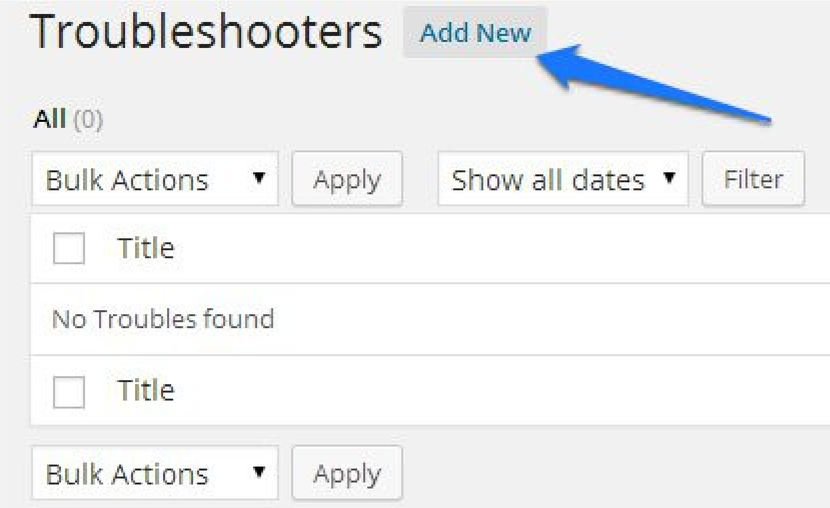


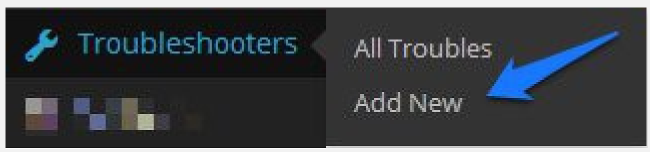
How to Manage Troubleshooters

Troubleshooters contain technical or troubleshooting information for users to refer to so they can initially try and fix the issue from their end before seeking support.

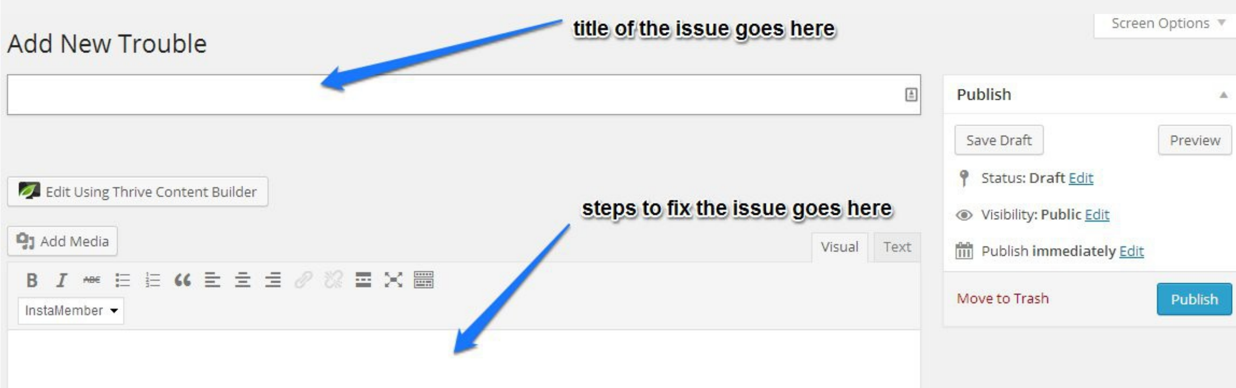
How to Add Troubleshooters

1. To add a new troubleshooter entry, click the **Troubleshooters** menu item from the left admin panel then click **Add New** or hover your cursor over the menu item to display the available options then click **Add New**.





2. The Add New Trouble page should then open for you which is quite similar to the default wordpress page/post editor. Add in the first field the title of the trouble to be addressed and on the editor, enter how to fix the issue.

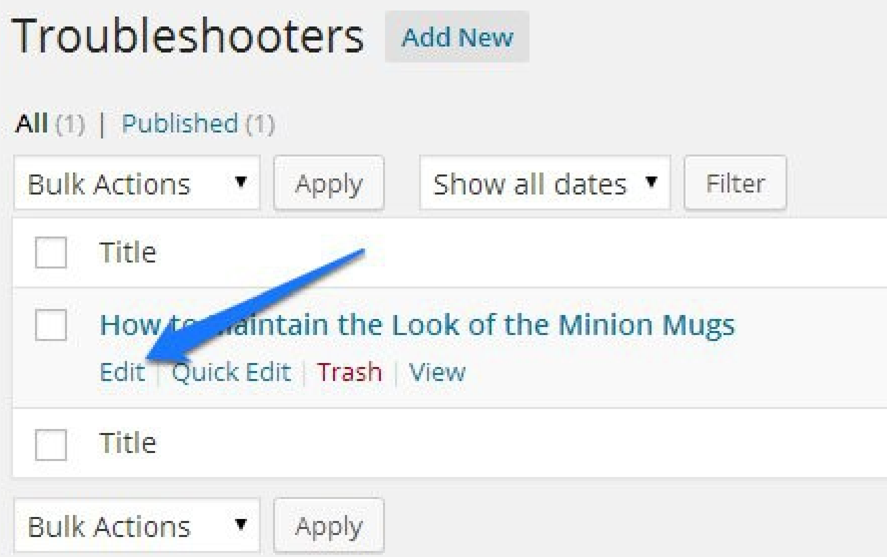


3. Once the entry has been finalized, click the **Publish** button to save it.

How to Edit Troubleshooters Entry

1. To edit a knowledgebase entry, simply click the **Troubleshooters** menu item from the left admin panel or hover your cursor over the menu item then click **All Troubles**.

2. You should then be taken to the **Troubleshooters** page where all entries are listed. Click the one you would like to edit. Or you can hover your cursor on the entry's row then click the edit link.

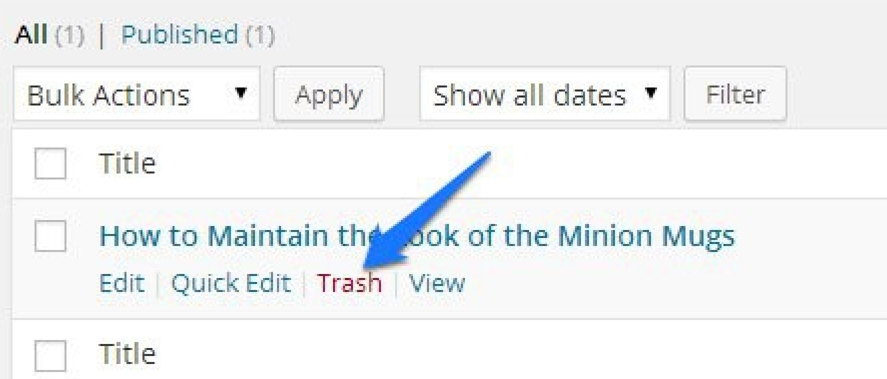


3. To check how the entry looks like live on the site, click the **View** link.

How to Delete Troubleshooters Entry

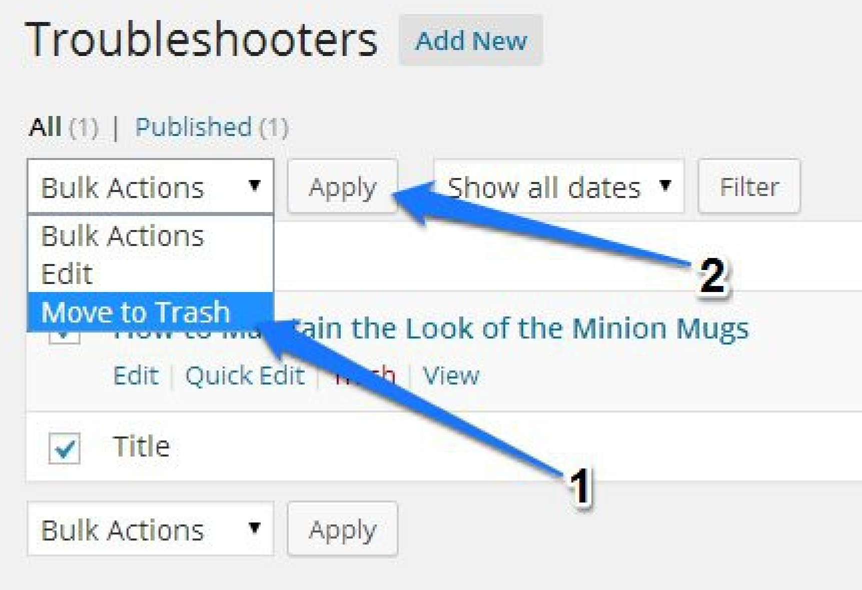
1. To edit troubleshooters entry, simply click the **Troubleshooters** menu item from the left admin panel or hover your cursor over the menu item then click **All Troubles**.

2. You should then be taken to the **Troubleshooters** page where all entries are listed. Hover your cursor on the entry's row then click the **Trash** link.



3. If you would like to delete multiple entries, all you need to do is tick the checkbox just beside each entry’s title.

4. From the bulk actions dropdown, click **Move to Trash** option and then click **Apply.**



How to Use WP EZ Ticketing as a User

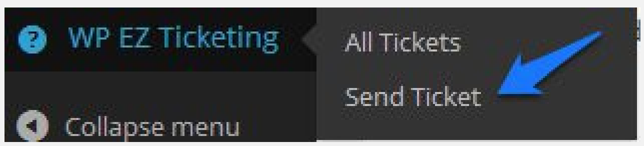
Note: In order for users to use WP EZ Ticketing, they should be at least registered on the site with a **Subscriber** role.

1. Login using the required credentials used when the user registered.

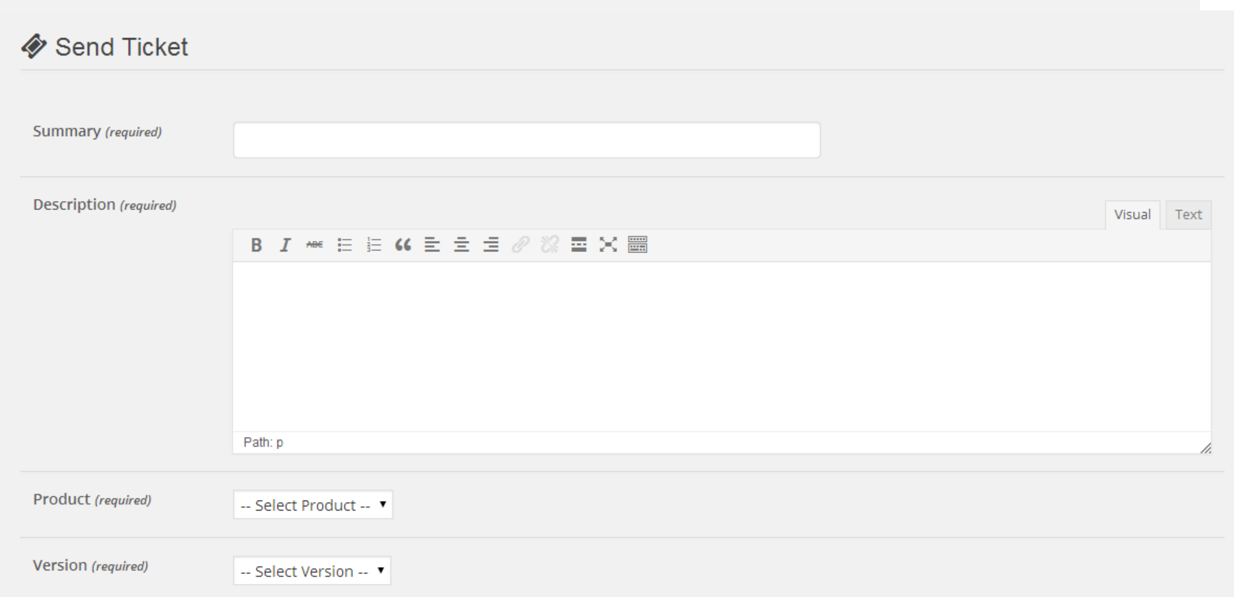
2. Click or hover your cursor over WP EZ Ticketing menu item from the left admin panel to access the ticket system. By default, when the menu item is clicked, you will be taken to the All Tickets page. To manage existing tickets, click All Tickets. To send a new one, click Send Ticket.

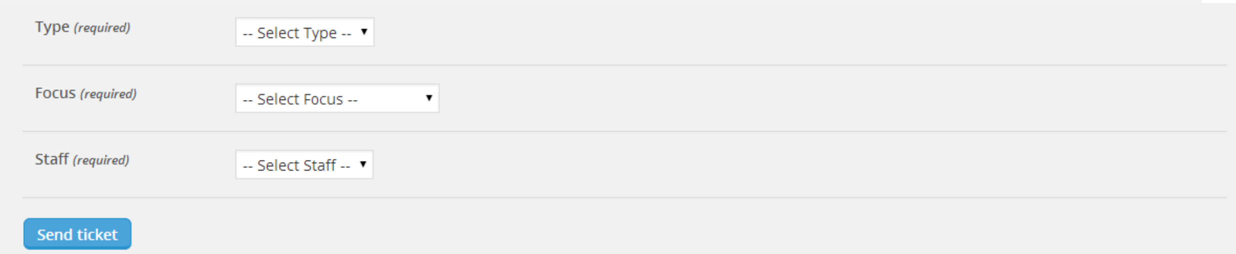
How to Create and Send a Ticket

1. Click **Send Ticket** from the left admin panel when you hover your cursor over WP EZ Ticketing menu item.



2. Once clicked, it will open up the Send Ticket page just as shown in the image below.





Note: All fields are required so you have to provide the appropriate information.

3. **Summary**. The user should enter in this field the summary of the issue or concern that prompted the user to seek support.

4. **Description**. The user should provide in this field an elaboration of the concern or the issue being experienced.

5. **Product**. The user should select from the dropdown the appropriate product he/she is having a concern or an issue with.

6. **Version**. The user should select from the dropdown the product's version in question.

7. **Type**. The user should choose from the dropdown the appropriate type option where the concern or issue should belong.

8. **Focus**. The user should select from the dropdown the appropriate focus option where the concern or issue should belong.

9. **Staff**. The user should select who among the staffs he/she would like to address the concern or issue experienced.

10. **Send Ticket**. Saves and sends the information provided by the user to the staff for review.

11. Once the user clicks the send ticket button, he/she will then be taken to **Add File** page where he/she can optionally include a file attachment to

the ticket submitted. To proceed with submitting the ticket with or without a file attachment, the user has to click the **Finish** button.

12. After the finish button has been clicked, the user will then be taken to the detail ticket page of the recently submitted ticket where he/she can edit the ticket or send a message with file attachment.

How to Edit a Ticket

1. To edit a ticket, the user needs to click **All Tickets or** the WP EZ Ticketing menu item on the left admin panel.

2. The All Tickets page lists down all tickets submitted including those that are still pending for the staff's review.

3. Click the blue edit button of the product you wish to edit.

4. Once clicked, you will be then taken to the detail ticket page. Click the edit button located on the top right portion of the page adjacent to the ticket id.

5. Clicking the edit button will trigger the display of the popup window where the user can make the necessary changes on the ticket submitted and finalize the modifications by clicking the edit ticket button.

6. It is in the same page that the user can monitor the updates of the ticket and at the same time send messages (with attachments) to the designated staff.

How to Delete a Ticket

1. Deleting a ticket is as easy as clicking the red delete button.
Note: You will not be prompted to confirm the action and once you have clicked on the button it will immediately be removed from the list of tickets the user has.