NS Helpdesk for WooCommerce User Guide

Set up customer tickets, a knowledge base, and your support team. This guide covers Lite first, followed by the extra setup available in Pro.

LITE	PRO
One shared staff inbox, customer tickets and replies, WooCommerce My Account portal, and searchable knowledge base.	Adds multiple agents and departments, workflows, reports, optional reply by email, and optional AI reply drafts.

Before you start

- Use WordPress 7.0 or newer, PHP 8.3 or newer, and an active WooCommerce installation.
- Make sure your store can deliver email. A successful WordPress send result does not guarantee inbox delivery.
- Use a customer account and an inbox you control for the first end-to-end test.

Lite quick start

Lite does not need a license key. Customers can manage tickets from WooCommerce My Account, while staff use one shared inbox.

1. Install and activate **NS Helpdesk Lite for WooCommerce** from its ZIP in **Plugins > Add Plugin > Upload Plugin**. Confirm WooCommerce is active.
2. Open **Helpdesk Lite > Settings**. Set **Inbox notification email** to the address that should receive new ticket and customer reply alerts.
3. Customers can use **My Account > Support Tickets**. For a separate support page, add the **NS Helpdesk Portal** block or the **[ns_helpdesk]** shortcode, publish the page, then choose it as **Support center page** in Settings.
4. Add product or service categories under **Helpdesk Lite > Product categories**. Publish knowledge base articles and assign their categories.
5. Sign in as a customer and create a test ticket. Reply from the shared staff inbox, then confirm the customer sees the reply and receives the email.

Pro setup

Pro adds departments, multiple agents, workflows, reports, saved replies, optional reply by email, and optional AI assisted drafts. When upgrading, deactivate Lite before activating Pro. Existing Helpdesk data is retained.

1. Install and activate the Pro ZIP. Open **Helpdesk > License** and enter the key and token from the **License Credentials** email sent after completed checkout. Keep them private.
2. In **Helpdesk > Settings**, choose a published support page with the NS Helpdesk Portal block or **[ns_helpdesk]** shortcode. Customers can also use **My Account > Support Tickets**.
3. Set the support notification address. Use **Send test email**, then confirm the message actually arrives in the inbox.
4. Create product or service categories in **Helpdesk > KB Categories** and publish articles in **Helpdesk > Knowledge Base**. Assign categories to articles.
5. For a team, create departments in **Helpdesk > Departments**, add WordPress users with the Support Agent role, and assign agents to their departments. Work tickets in **Helpdesk > Agent Inbox**.
6. Create a customer test ticket, assign it, send a public staff reply, and confirm the customer sees it and receives the email.

Optional Pro features

- **Reply by email:** Configure an inbound IMAP mailbox under **Helpdesk > Settings > Reply by email** and test the connection. This imports customer replies into matching tickets. It is separate from outbound notifications and needs a working WordPress scheduler and PHP IMAP support.
- **AI drafts:** Add an OpenAI API key in Helpdesk settings or the WPHD_OPENAI_API_KEY configuration constant, choose a model, test the connection, and enable agent drafting. Agents review and edit drafts before sending. OpenAI usage is billed separately.
- **Team workflow:** Configure custom fields, workflows, saved replies, and ticket templates. Review workload in **Helpdesk > Reports**.

What customers see

Signed-in customers can open a ticket, choose a product or service, and manage their own conversations in **WooCommerce My Account > Support Tickets**. A separate support page can show ticket access and knowledge base search. Staff-only internal notes do not appear in customer replies.

Troubleshooting

- **Support page is empty:** Check that it is published, contains the NS Helpdesk Portal block or [ns_helpdesk] shortcode, and is selected in Helpdesk settings.
- **No ticket emails arrive:** Check the notification address, spam folder, and mail delivery service. In Pro, send a test email from Settings and verify inbox receipt.
- **Email replies do not appear in tickets:** Outbound notifications alone do not import replies. In Pro, enable Reply by email, verify IMAP, and confirm WordPress scheduled tasks are running.
- **AI cannot answer a product question:** Add accurate product details to the knowledge base or give the agent relevant facts for the draft. Review before sending.
- **Moving from Lite to Pro:** Deactivate Lite, activate Pro, and check existing tickets and articles. Do not run both editions simultaneously.