help.gorgias.io Documentation

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Alexandru Plugaru

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Welcome to the Gorgias docs!

We have two products:

- Gorgias Helpdesk: a multi-channel helpdesk integrated with your back-office.

- Gorgias Templates: a Chrome Extension to insert email templates with shortcuts.

Browse our documentation to learn more about them!

Questions?

We're always happy to help with questions you might have! Search our site for more information or send us an email at support@gorgias.io!

Overview

2.1 What is Gorgias Helpdesk?

Gorgias helpdesk is a support platform integrated with all your apps. You can connect Shopify, your own back-office, or any app you want. When a customer contacts you, you see the full profile of the customer. You can respond to them and take actions on the customer's account, like giving them a gift card.

2.2 Getting started

To start responding to your customers with Gorgias, follow these 3 quick steps:

1. Create a Gorgias account

2. Forward your support emails to support@{account-name}.gorgias.io. You can follow

this tutorial if you use Gmail.

3. Head to *Integrations* to connect the apps you use for support to Gorgias

You're good to go!

2.3 Integrations

We've built Gorgias so that you can manage all your customer support in one place. Integrations enable you to connect any application to Gorgias, provided that this application has an internet facing HTTP-based API.

There are three main use cases for integrations:

- Connect a support channel to Gorgias, like chat or social media

- Fetch customer data from a third party app (e.g. from your own back-office)

- Perform actions in a third party app (e.g. give a gift card to a customer)

We provide built-in integrations for Facebook & Smooch. If you'd like to connect another app, you can use an HTTP integration.

We're happy to help you connect your apps to your Gorgias account, if you have questions feel free to contact us at support@gorgias.io.

2.3.1 Facebook

Facebook is a popular social network where customers can interact with companies. This integration creates tickets when customers post on your Facebook page or send you a message on Messenger.

To get started with Facebook:

1. Click "Add Facebook Page"

2. Authorize the Gorgias app on Facebook

3. Select the page you want to add

4. Choose your import settings

5. Click "Add Page"

Once you've added a Facebook page, every time someone posts on the page, comments on a post, or contacts the page via Messenger, it will create a ticket in Gorgias. When you respond to this ticket, your response will be visible to the customer on Facebook, and also to your team on the Facebook messaging app.

Note: If the agent who added the page to Gorgias no longer has admin permissions on the page, you'll need someone else to re-authorize the page on your Gorgias account.

2.3.2 Smooch

Smooch is a chat widget that you can add on your website to interact with customers.

In order to enable chat in Gorgias, you need to create an account on Smooch first.

Then, here's how to connect your Smooch account to Gorgias:

1. Click the "Add Smooch" button in integrations

2. Go to your Smooch account settings, create a new secret key and paste your "key ID" and "secret" in Gorgias

3. Click "Add Integration"

Secret Keys

The secret keys can be used to access the REST API or for added security when authenticating users to the SDKs.

KEY ID	SECRET	DATE CREATED (UTC)	
app_537237a877d9f4e486f96a75	8wLtYgZ5Xa3_bq7kdwrG__Xw	June 28, 2016	🗑
app_	7Ydisk~gU0SKgcPK7_QwwC7y	November 15, 2016	🗑

⊕ Create New Secret Key

Once you've added Smooch, when a visitor or a an app user start a conversation with you, it will create a chat ticket in Gorgias. You'll see a notification in recent activities and the ticket will auto-refresh when the customers responds.

2.3.3 HTTP Integrations

HTTP integrations allow you to connect any third-party app to Gorgias.

There are two main use-cases for HTTP integrations: - Trigger an action in a third party app when a ticket is created or updated. - Get customer data from a third party to populate the user profile

You can use Gorgias variables to pass data to other apps, like the customer's email with the {ticket.requester.email} variable

Below are popular use cases for HTTP integrations.

Shopify

When you receive a message, you can display the customer profile and the last orders from Shopify in Gorgias. Then, you can also do actions in Shopify from Gorgias itself.

Here's how to do so:

1. Go to your Shopify account

2. Open the "App" page

3. Select "Private apps"

4. Create a new private app, called "Gorgias"

5. Send the API key and the API secret to support@gorgias.io, and we'll finish the setup for you!

Your custom back-office app

Most support teams use a custom back-office, or admin, to look up customer profiles and do actions on them.

With Gorgias, you can automatically fetch customer data when a ticket is created, and display it next to tickets.

To do so:

1. Add an http integration

2. Use the GET method and your back-office url. It should look like this: company.com/api/users?email={ticket.requester.email}

3. Optional: use a headers to pass the API key. For instance: "Authorization", "Basic 5Nmy9Z1loPr0M45TVBVRqoKyccj1jI03aGAZEx2fkO4KILVAq9PCpqA2Dk4Zcee9KkhTbHB5TrC5yydx="

4. Select a trigger

5. Save

Then, when a ticket is created or updated, Gorgias will automatically pull customer information from your back-office, and display it in the sidebar on the left of your tickets.

You can then use the interface builder to personalize the sidebar to your needs.

Slack

When a new ticket is created, you can connect Slack to post a notification in the Slack channel of your choice.

Here's how to do it:

1. Go to "Apps & integrations" on Slack

2. Click "Build" (top right) to add a custom integration

3. Select "Incoming WebHooks"

4. Select the channel where you want to see notifications of new tickets, and click "Add Incoming WebHooks Configuration"

5. Copy the "Webhook URL"

6. Create an HTTP integration in Gorgias

7. Use the "Webhook URL" from Slack as a url

#support

👤 6 | 📌 1 | *Add a topic*

☎ ⚙

> Show more...

g| **Gorgias** BOT 7:35 AM
New ticket **The Buffer for your Twitter profile, @gorgiasio, is empty. Here's how you're doing!** from **Buffer**

> **The Buffer for your Twitter profile, @gorgiasio, is empty. Here's how you're doing!**
> [](https://buffer.com?utm_campaign=weekly_digest_email_logo) Show more...

g| **Gorgias** BOT 8:53 AM
New ticket **Conversation with Productive Spider** from **Productive Spider**

> **Conversation with Productive Spider**
> Hi there

8. Paste the code below to the body (to pass the ticket information to Slack)

9. Select "Ticket Created" as a trigger

10. Click "Add Integration"

TADA!

Zapier

You can trigger a zap when a ticket is created and/or updated.

To do so:

1. Create a zap in zapier and choose a "webhook" as a trigger.

2. Create an http integration in Gorgias

3. Select the POST method and use the webhook url from Zapier. You can pass arguments from Gorgias to Zapier using headers.

4. Select a trigger of your choice

Now, when the integration is triggered, your zap will run.

2.4 Getting Started

Gorgias is a Google Chrome extension that allows Gmail, Outlook and Yahoo users to write e-mails faster by using the *Autocomplete Dialog*, *Keyboard Completion*, *Alternatives* and other features.

Install the extension!

Gorgias can also be used in tandem with the https://gorgias.io/ website to enable features such as Team Sharing, Backup, Usage Statistics and other features, but it's not a hard requirement. The extension can be used stand-alone.

Integrations > HTTP > **Slack Integration**

Slack Integration

Let's configure this HTTP integration.

**Name** *

Slack Integration

Description

Triggered on a new ticket

URL *

https:// ▼ | hooks.slack.com/services/SDUI89DQS/QSD81NSCK/sdifudis23Odsfku98

Method *

POST ▼

Request content type *

application/json ▼

Response content type *

application/json ▼

Headers

No header

ADD HEADER

Request Body (JSON)

```
{
   "text": "New ticket <https://{ticket.account.domain}.gorgias.io/app/ticket/{ticket.id}|*{ticket.subject}*> from *
{ticket.requester.name}*",
   "attachments": [
     {
        "text": "{ticket.first_message.body_text}",
        "title_link": "https://{ticket.account.domain}.gorgias.io/app/ticket/{ticket.id}",
        "title": "{ticket.subject}"
     }
```

Triggers *

This HTTP integration will be executed when any of the events below happened

🟢 Ticket Created ⚪ Ticket Updated

SAVE CHANGES   DEACTIVATE   DELETE

2.4.1 Use cases

So far there are 2 major use cases for *Gorgias*. Feel free to choose the one that fits your use case the best.

Standalone extension

If you use on your own (you don't have a team) then you don't have to login or register on the https://gorgias.io/ website. You can simply install the extension here and use it on your own.

However, if you like store your templates online and synchronize them between devices & team members, you can create an account here.

Using Gorgias in a team

If you work in a team and you want to share and collaborate on your templates with your team members then you're in luck! Because https://gorgias.io allows doing just that.

All you have to do is create an account on this website. Add some users and start working together. More on this topic in the Sharing section.

2.5 Autocomplete Dialog

Automatic dialog helps finding the correct template right there where you type.

Imagine that you have a template that explains to your users that they have to check their spam inbox:

```
Title:
    Add note about Spam folder

Body:
    Note: If you can't find the e-mail, please check your
    'Spam' folder in order to find the missing e-mail.
```

Now when you hit *CTRL + Space* in the body of your e-mail a small popup will appear where you can choose the correct template.

You can find the above template by typing *spam* for example. It will match it because it finds it in the title.

Note: The *CTRL + Space* keyboard shortcut can be changed in *Options*.

2.5.1 Disabling Autocomplete Dialog

Autocomplete Dialog is great, but if you want to disable them yo can do so by accessing the extension's *Options*.

2.6 Keyboard Completion

Keyboard completion inserts templates in your e-mail by typing a *keyboard completion* shortcut and then hitting a keyboard combination (by default the Tab key). You can see and example of keyboard completion usage in the following video:

[video]

2.6.1 Disabling Keyboard Completion

Keyboard Suggestions are great, but if you want to disable them yo can do so by accessing the extension's *Options*.

2.7 Synchronization

If you have Google Chrome installed on multiple devices you can synchronize your templates between machines. Here's how you do it:

Please make sure that you have the *Gorgias* extension installed on you Google Chrome before following the steps bellow.

1. Open the 'Options' for *Gorgias* from Extensions menu in Google Chrome.

2. *Login* or *Register* if your not yet registered on the https://gorgias.io/ website.

3. Click on *Sync Now* button (it takes a second or 2).

4. Optionally refresh the page if you don't see them right away.

Now all your templates should be synchronized with the Synchronization server.

In order to get your templates synchronized with other machines repeat the steps above (but this time just Login).

2.7.1 How does synchronization work?

Every time the synchronization process starts all your templates are uploaded and stored to the https://gorgias.io/ via a secure HTTPS connection.

The uploaded templates can now be shared between computers or with other members of your team using the https://gorgias.io interface.

Syncing not only uploads all your templates it also updates the templates that have been modified on other computers or downloads the new templates shared by your team.

Note: No templates are ever deleted! Unless you specifically demand it. In order to completely delete your data please send an e-mail to support@gorgias.io

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2.7.2 Why not use Google Sync instead?

While Google Sync is very convenient and works well for most Chrome extensions, it's a bit more complicated for *Gorgias*.

Here are the reasons why Chrome Sync is not the best fit for Gorgias:

First, chrome.storage.sync is limited to 100MB and 512 items. While this is more than enough for most Gorgias users, some of our users have more than 512 templates. Hard to believe, but true.

Secondly (and probably most importantly for our customers) the chrome.storage.sync is attached only to one account, you can't share your templates with other team members.

Other practical reasons include the fact that it's difficult to debug a Sync problem when it's completely outside your control (Google Servers) and it's especially difficult to maintain 2 different implementations of a syncing methods.

We'd be more than happy to discuss a solution to this issue: support@gorgias.io

2.8 Templates

2.8.1 What's a template?

A template is a piece of text that can be inserted in any website input field with Gorgias, to avoid writing it manually. It can be any repetitive text you frequently write.

Here are a few examples:

```
Malala Yousafzai
Nobel Peace Prize 2014
malala@yousafzai.org
(415)-937-2402
```

```
Hello Jane,

Thanks for contacting us. Here are the steps to reset your password:
...
Best,

John
```

2.8.2 How to create a template?

First, go to the New Template page

1. Click on the "G" icon to open the Gorgias menu

Fig. 2.1: caption

2. Click on "New Template". You're in! Now let's create your template
3. Give a name to your template, choose a shortcut (that's the shortcut you will type to insert it), and a body

You can now try inserting it in your favorite inbox.

You can also create templates out of text in Chrome

1. Select the text you want to create a template out of, right click on it, and hit "Save [selected text]...".
2. You can now configure it and save it as explained above!

Fig. 2.2: caption
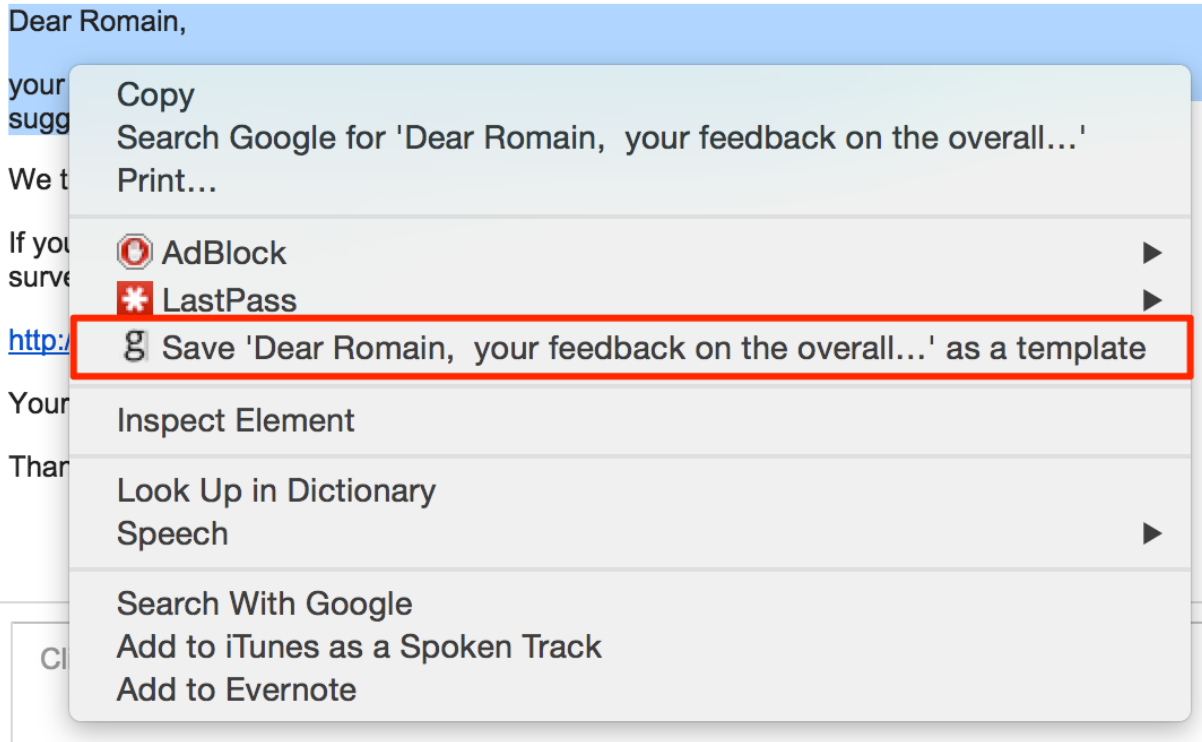
4. Save it and you're done!

Fig. 2.3: caption

2.8.3 Variables

If you address someone in a template, you can use a *variable* to avoid changing the recipient's name everytime you insert this template.

Imagine you start a template by addressing the recipient:

```
Hello XXX,

And then the rest of the e-mail follows...
```

You can use a variable for the recipient first name. Place the selector where you want to insert it, click on "Insert Variables" and select "To: First Name".

Now your template looks like this:

```
Hello {{to.first_name}},

And then the rest of the e-mail follows...
```

and if you write to Jane, this is what it will print when you insert it:

```
Hello Jane,

And then the rest of the e-mail follows...
```

TADA!

List of variables

Here is the complete list of variables you can use:

- *To* field (recipient)
    - `{{to.email}}`
    - `{{to.name}}`
    - `{{to.last_name}}`
    - `{{to.first_name}}`
- *From* field (you!)
    - `{{from.email}}`
    - `{{from.name}}`
    - `{{from.last_name}}`
    - `{{from.first_name}}`
- *CC* field
    - `{{cc.email}}`
    - `{{cc.name}}`
    - `{{cc.last_name}}`
    - `{{cc.first_name}}`
- *BCC* field
    - `{{bcc.email}}`
    - `{{bcc.name}}`
    - `{{bcc.last_name}}`
    - `{{bcc.first_name}}`
- `{{subject}}` - subject content of the message
- **`{{date '<amount>' '<unit>' '<format>'}}` - relative date**
    - **A few examples with dates (list of date formats)**
        * Next week: `{{date '+7' 'days' "DD MMMM"}}` -> 13 December
        * Last month `{{date '-1' 'months' "DD MMMM YYYY"}}` -> 29 November 2015
- `{{choice 'hello,hi,hey'}}` - a random choice.
- `{{#splitString to.email delimiter='@' index=1}}{{#splitString this delimiter='.' index=0}}{{this}}{{/splitString}}{{/splitString}}` - Domain name of the email recipeint. Ex: if the recipient is support@gorgias.io, this variable will print "gorgias"

The power of the templates is given by the Handlebars template library.

To see the complete list of possible time formats check out momentjs formatting here.

Note: If the variable value is missing (e.g. no First Name for the contact) the variable will be replaced with an empty string.

2.8.4 Formatting

To add formatting to a template, you can use HTML.

If you don't know HTML, no worries! We have a trick for you:

- Format your template in Gmail (with links, or anything else you need)
- Copy it here, convert it into HTML & copy the HTML code
- Copy the HTML code in your template body, you're good!

2.8.5 Adding email subject in a template

If you're using Gorgias to send emails, you can also add an email subject in a template.

In the "New template" window, click on "Configure Fields" to show the subject field, and type in the subject here.

2.8.6 Tagging

You can tag templates to keep your templates organized. You can find more in *Tags*.

2.9 Tags

Tags help with filtering and categorization of templates. You can add a tag to a template by updating the 'Tags' field.

Once that's done you can start filtering your templates by clicking the tags you want to filter by.

Note: You can filter other templates with the same tag by clicking on the tag labels.

You can you can also use *Search* if you want a more advanced filter.

2.10 Search

Once you and your team start to have a lot of templates finding the right one can be complicated. Here's where searching comes in handy.

You can search by keywords in the *title* or *body* of your *template*. You can also filter templates by using *Tags*.

2.11 Plugins

The extension officially adds support for a few websites via plugins. Currently these are the websites officially supported by the extension:

- Gmail
- Outlook.com
- Yahoo

2.11.1 Gmail

All features are fully supported.

2.11.2 Outlook.com

Work in progress.

2.11.3 Yahoo

Work in progress.

2.12 Alternatives

The Gorgias Google Chrome extension is very useful for a lot of people, but it may not be right for you.

Here's a list of alternative extensions or programs (only free extensions listed):

- Quicktext for Thunderbird
- Auto Text Expander for Google Chrome
- Gmail Template and Snippet manager

Note: This is not a complete list. Feel free to suggest others here: support@gorgias.io

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2.13 Options

To customize the extension and get to it's options follow the following instructions:

1. Open Google Chrome
2. Customize and Control Google Chrome (the hamburger icon top right corner)
3. More tools
4. Extensions
5. Find *Gorgias* in the list (make sure it's enabled).
6. Click on *Options* link.