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The ultimate integrated Magento helpdesk solution

For Kayako Fusion and FUIM Version 4.5.x

Documentation version 1.4

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Fusion, Kayako's flagship, is a sophisticated helpdesk system and used to support many websites. There are two problems that stands in the way of a superb user experience. There is no Single Log On (SLO) available and there is only a limited implementation of Single Sing On (SSO).

The Fusion Ultimate Integration solution(short name FUIM) addresses these problems by means of an easy to install Fusion Module. After installation you get:

- SLO: a user who logs in to Fusion gets automatically logged in to the supported website . For clarity we will call the supported website "the Integration" in this document.
- SSO: The user needs only to register once and gets registered to the other site. Your choice if registration takes place on the Fusion or the Integration.
- User records are synchronized in the background when a user logs on. Thus changes in the user record like password, user group or full name are done on the fly on both sites without any action of the user. When you disable this module, the sites can run independently.
- You don't need to change any Fusion or integration code. Just a small adaption of one of the CSS files of fusion is needed to make the module work.
- Plugin system. Integrations are supported by means of an open source plugin system. You can easily program your own by changing a few lines in the existing plugins. Many plugins will be available, at this moment plugins for Joomla 1.5, Joomla 1,6 and higher, WHMSC and Magento are part of the release. In beta phase we find Wordpress, osCommerce (2 and 3),OscXT, OscZen, OscMax, OscSEO, Moodle and Efront. Under consideration a bulletin system, myBB, Vbulletin, phpBB3 and more. Because of our experience with JFusion we can convert JFusion plugins quickly into an integration class of FUIM.
- DSLO: With additional software, f.i. the Breincoach Magento DSLO support module for FUIM you get DSLO. This means a user can login to either the integration (f.i. Magento) or Fusion to get logged in on both. This is important for e-commerce websites where the client can register and login during the checkout process without losing the basket.
- Note that the software also works with Kayako's Engage and Resolve.

This documentation is for our Magento DSLO support module, to be installed under Magento. You also need to install our Fusion Ultimate Integrated Module (short name FUIM) under Kayako's 4th generation helpdesk system, Fusion and Resolve. Please read the FUIM documentation first to get an understanding of how the combination of the two modules work and what configuration options are, then install this module and FUIM thereafter.

All our software need **Ioncube** installed on the server where you run your software. Almost host have this enabled by default.

INSTALLATION

UPLOADING AND INSTALL

Before attempting to install the Magento DSLO module make sure you have the cookie domain set to **.mydomain.com** (note the dot in front) and the path to **/** (forward slash). In the following places:

1. Fusion configuration
2. Fusion FUIM setup
3. Magento configuration

Also make sure the setup with the helpdesk configuration is working correctly meaning that if you logged in as a user on the helpdesk you are logged in to Magento as well. Fusion should be set as **master**.

If everything works as designed you can install the DSLO module.

1. If you're using the Magento compiler - or if you are not sure if you're doing so - please log into the Magento backend and go **to System > Tools > Compilation** and turn it off. If you don't do so there's a good chance you'll temporarily break your Magento installation.
2. Unpack the archive magento_fuim_4_x_x .zip and upload the result to the Magento root directory.
3. After this upload your keyfile renamed to **magento_fuim_key.php** to the direcory `/app/code/local/Breincoach`

   Make sure that the directories are writable. After uploading the directory structure created by the upload process should be:

```
/app/code/local/Breincoach
                magento_fuim_key.php
                breincoach_dslo_helper.php
                breincoach_magic.php
/app/code/local/Breincoach/Customer
                AuthList.php
                IntegrationList.php
                LoginTypeList.php
                MasterSlaveList.php
/app/code/local/Breincoach/Customer/controllers
                AccountController.php
/app/code/local/Breincoach/Customer/etc
                config.xml
                system.xml
/app/etc/modules
        Breincoach_All.xml
```

4. Log in to Magento's backend if you have not done already and go to **System > Configuration > Cache Management** and click both the **'Flush Magento Cache**' as well as the **'Flush Cache Storage**' button. This is required to activate the extension.
5. Log out of the Magento admin and log back in - you'll see a 404 Error when trying to open the configuration section if you don't log out / log in once.

6. If you're using the Magento compiler and had it enabled before installing this extension, go to **System > Tools > Compilation** and click on '**Run Compilation Process'** to re-compile Magento and enable it again by clicking on '**Enable**'.
7. Install either a trial license of the paid license. See at the end of this document.

CONFIGURATION

At this point goto the Admin Panel of your helpdesk installation and **run the DSLO Wizard**. This wizard will find all configuration settings needed for the DSLO module to work and install them in Magento. Then return here.

ADDITIONAL CONFIGURATION OF FUIM

When you use this module the correctt setup is to have Magento as Master and the helpdesk as Slave.

ADDITIONAL CONFIGURATION OF KAYAKO'S FUSION

In the file <fusion root>/__swift/config/config.php change the line:
```
define('SESSION_IPCHECK', false);
```
to
```
define('SESSION_IPCHECK', true);
```

and from fusion version 4.5 **also uncomment** the line
```
//define('ENABLE_FORWARDED_IP', true);
```
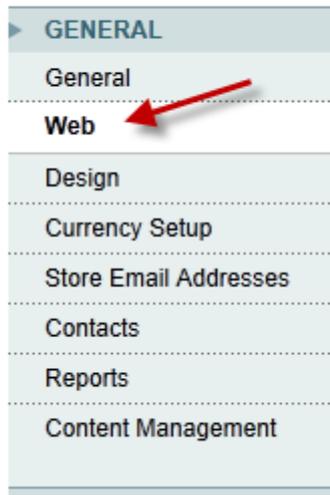
The DSLO module's configuration should be Ok, but is disabled by default. Also debugging is switched off. To test the configuration enable the module (see below : DSLO configuration screen to find the place to enable the module) and login on Magento's Frontend with a valid user. Then access the helpdesks frontpage wth a new tab in the same browser (or in the same window where you logged in to Magento). If you see that you are logged in to the Helpdesk then go back to Magento and logout. Again access the helpdesk and refresh the window (tab). If you are logged out then the installation and configuration of the DSLO module is done.

If not or if the DSLO configuration wizard in the helpdesk did not complete correctly continue.

ADDITIONAL CONFIGURATION OF MAGENTO

We need to configure a few items in Magento to make sure FUIM and our module can co-operate.

Configuration

► GENERAL
- General
- Web
- Design
- Currency Setup
- Store Email Addresses
- Contacts
- Reports
- Content Management

1. In the left menu click on **Web**
2. A Web configuration form will appear, see below

Web   ● Save Config

Url Options	▼
Search Engines Optimization	▼
Unsecure	▼
Secure	▼
Default Pages	▼
Polls	▼
Session Cookie Management	▲

Cookie Lifetime	3600	[STORE VIEW]
Cookie Path	/	[STORE VIEW]
Cookie Domain	.breincoachtest.com	[STORE VIEW]
Use HTTP Only	No	[STORE VIEW]

Session Validation Settings ▲

Validate REMOTE_ADDR	No	[GLOBAL]
Validate HTTP_VIA	No	[GLOBAL]
Validate HTTP_X_FORWARDED_FOR	No	[GLOBAL]
Validate HTTP_USER_AGENT	No	[GLOBAL]
Use SID on Frontend	Yes	[WEBSITE]

▲ Allows customers to stay logged in when switching between different stores.

| Browser Capabilities Detection | ▼ |

If all sections are closed, click on **Session cookie management** and **Session Validation Settings** to open those two sections as shown above.

SESSION COOKIE MANAGEMENT

1. Cookie lifetime. Should be the same as filled in in he module. Advise: **3600**
2. Cookie path: **/** is OK.
3. Cookie domain, This should be exact the same as the one we used in the module configuration form.
4. Use http only. Set to **No** for a start. If all works, we can set this to yes on ALL configuration forms (4: FUIM,Fusion,Magento and this module)
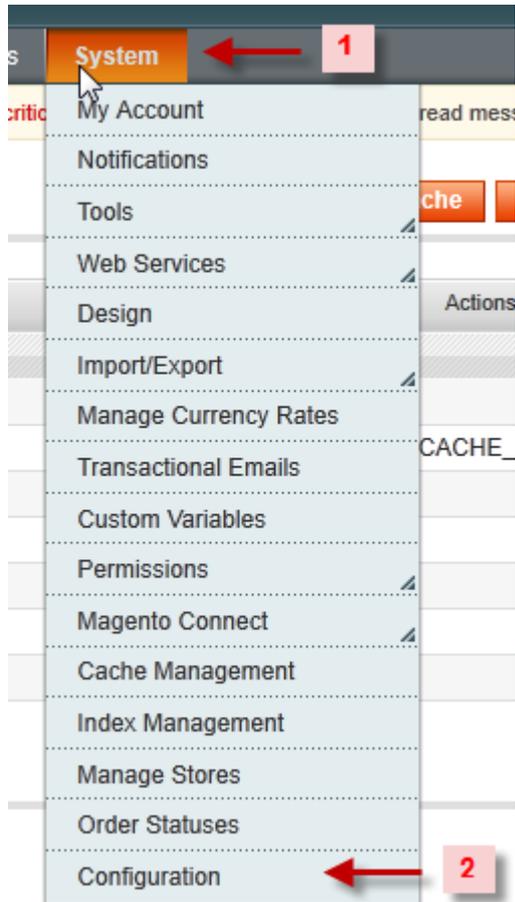
SESSION VALIDATIONS SETTINGS

5. Leave all this items on their default settings. Changing them may result in our integration not working.
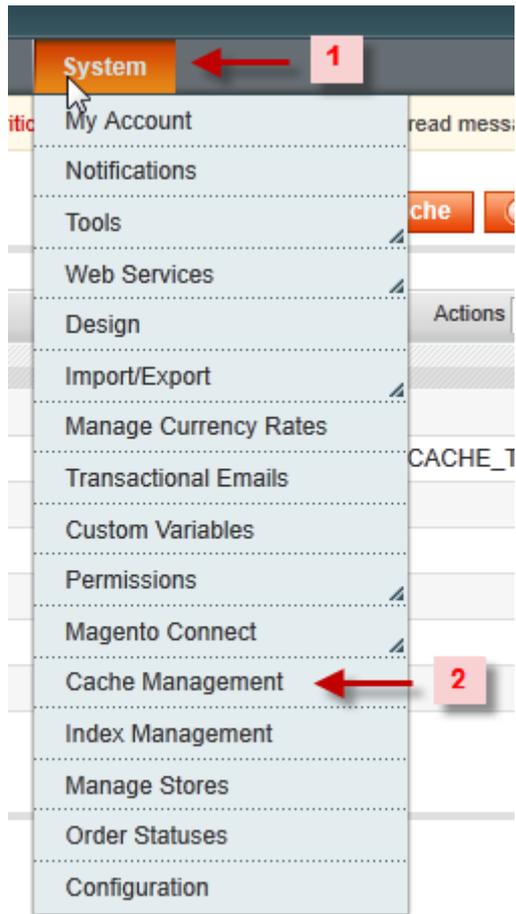
1. Log in as admin and go to Magento's admin panel.
2. Click on System and then Cache Management.
3. Click then on Select All and Flush the Cache.

1. Again, click on System.
2. Then on Configuration.

In the menu in the left column you should now see a new tab marked EXTRAS and a new item called Breincoach DSLO support.

If you do not see these items then go to Appendix A to find out how to correct this situation. Return here when the issue has been resolved.

3. Logout of Magento as admin and login again so the admin rights to configure the DSLO modules get updated.

We now need to check and eventually complete the Breincoach DSLO Support configuration form. Almost all settins are correct thanks to the wizard. We will take you through the form section by section:

1. Module enabled: For now set/leave this at **NO**.
2. Full URL to host. This should point to your kayako installation root.
3. Module mode. Leave at **Maste**r. Never set Magento to Slave.
4. Debug mode: Only set to On when you have problems with this module logging in to the helpdesk.
5. JFusion support. Leave at **NO.**
6. JFusion support Full path to Joomla: can be left empty.

1. Integration type. Leave at **0-0**.
2. HTTP authorization. Only needed when you have protected the directories of the helpdesk during development phase.

1. Cookie Domain: See example above. You must set these items exactly the same is in Kayako. Again, the domain should look like `.yourdomain.com`. <mark>The point at the beginning is mandatory!</mark> In our example setup we assume you have Magento installed in the web root and the helpdesk in the subdirectory `fusion`. If you want to avoid trouble then do not use subdomains. If you must, and you have no experience, then contact us for (extra) support.
2. Cookie path: the default **/** will be fine.
3. Cookie lifetime in seconds. You should set this the same as all cookies, boyh in Magento and Fusion. Advise: 3600 seconds
4. Secure cookies: set to the same as the helpdesk setting.
5. HTTP-only cookies: set to the same as the helpdesk setting.
6. Cookies to leave alone: leave empty, only use after consulting us.
7. Cookies to override: leave empty, only use after consulting us.

Module Login settings

Login Type	Brute Force
Login Path	/
Login Form: Form ID/Name	LoginForm
Login Form: Field ID/name of username	scemail
Login Form: Field ID/name of password	scpassword
Login Form: Action Field has relative path	No
Login Form: Post hidden fields	Yes
Login Form: Post buttons info	Yes

1. Login type: Set **to Brute Force**.
2. Login Path: must be /
3. Login form, ID: Only change if you have a customized login form in the helpdesks CSS.
4. Login form username field ID: Only change if you have a customized form in the helpdesks CSS.
5. Login form, password field ID: Only change if you have a customized form in the helpdsks CSS.
6. Login form, action field has relative path: **YES** (NOTE, this is correct for Kayako Fusion et all).
7. Login form post hidden fields: **yes.**
8. Login form post buttons inf: **yes.**

Module Logout settings

Logout Type	URL
Logout Path	index.php?/breincoach/Breincoach/Logout
Logout Form: Action Field has relative path	No
Logout URL: postfieldstring	

9. Logout type: **URL.**
10. Logout path: `index.php?/breincoach/Breincoach/Logout.`
11. Logout form action field has relative path: **NO**.
12. Logout URL postfields string: **leave empty**.

So far so good, that completes the configuration. Please **save.**

Maybe you are wondering about all these configuration items. The reason is that the module can be configured for many changes in the Helpdesk CSS and can even be used for other software than Kayako's helpdesk.

MAGENTO API USER AND API KEY (PASSWORD)

There is also a Magento integration class included in FUIM that uses the Magento database directly, This is much faster and the preferred way to integrate Magento.
Magento API integration is often problamatic especially with Magento Professional and Magento Enterprise.
 NOTE: You can skip this section when you have set FUIM to use the Magento integration using the magento database access.

If you have set FUIM to use the Magento integration Class that uses the magento API we need to create an API user and a password (key) for this user. We also need to tell Magento what rights this user should get.
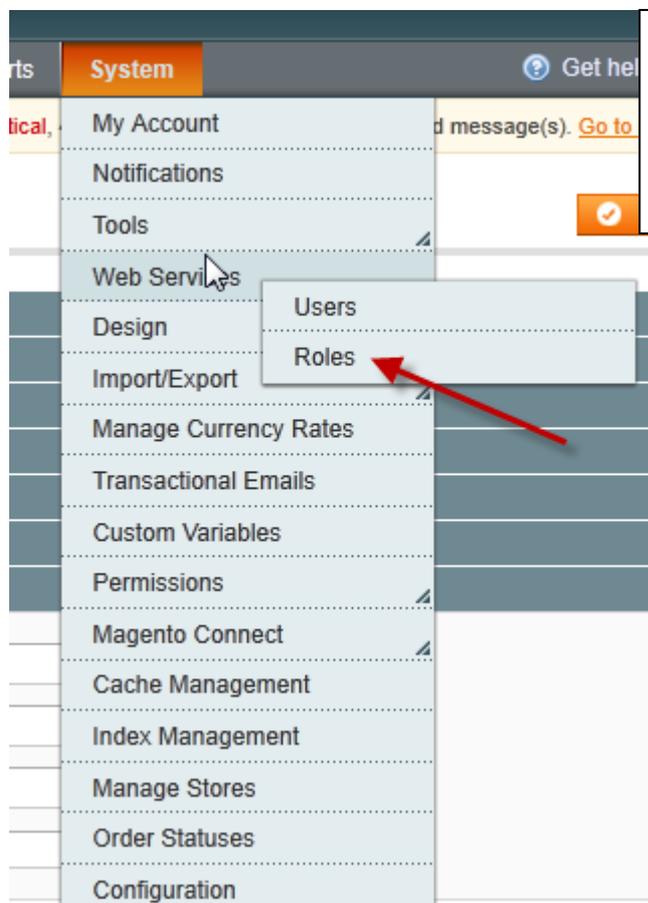
6. Click on System
7. Click on webservices
8. Click on roles

1. Click on: Add a new Role
2. Choose a role name
3. Click on: Role Resources
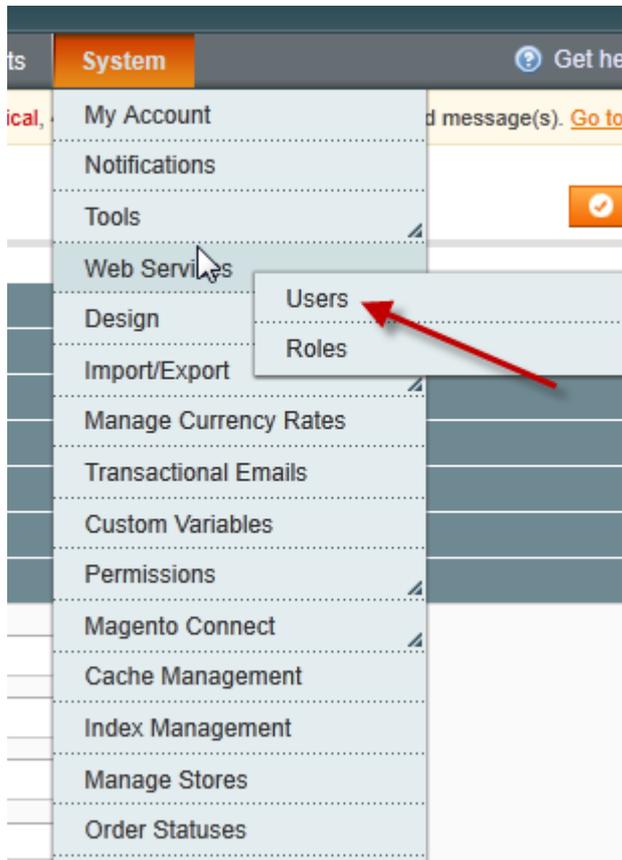4. Select: All
5. Click on: Save Role

Role Information

Role Info

Role Resources

6

Add New Role

Role Information

Role Name *   fuimsupport

5

Add New Role

Roles Resources

7

Resource Access   All ▼

System

My Account
Notifications
Tools
Web Services   Users
Design   Roles
Import/Export
Manage Currency Rates
Transactional Emails
Custom Variables
Permissions
Magento Connect
Cache Management
Index Management
Manage Stores
Order Statuses

⊘ Get hel

d message(s). Go to

9. Click on: System/Web Services/ Users
10. In the next screen Click on: Add New User
11. In the next screen: Enter new user data
12. Then Click: Save New User
13. Done!

⊕ **Add New User**

New User

Account Information

User Name *	ApiUser
First Name *	Api
Last Name *	User
Email *	apiuser@fuim.org
API Key *	••••••••••
API Key Confirmation *	••••••••••
This account is	Active ▼

◉ Back   Reset   ✓ Save User

UPDATING THE MODULE

You install an update of the Magento DSLO module in exactly the same way as installing the original. Unzip the module and upload, overwriting the existing files.

Then go to the Modules setup screen, check if all settings are correct and save the settings. This step is mandatory!

TRIAL LICENSE

You can request one (1) trial license for 15 days for a domain. The procedure is automated on our support website **www.breincoach.eu**

Important: You should request the license for the main domain so for www.mydomain.com and f.i. support.mydomain.com you request the license for **mydomain.com**

You install the license file renamed to **magento_fuim_key.php** in the directory

```
<magento root>/app/code/local/Breincoach
```

PAID LICENSE

You need a paid license to run this software. The license is bound to your domain and has no time restrictions. A local test host is also licensed with no additional costs. Multi domain licenses are available. The procedure to pay with Paypal and receive a license is automated on our support website www.breincoach.eu.

Important: You should request the license for the main domain so for www.mydomain.com and f.i. support.mydomain.com you request the license for **mydomain.com**

You install the license file renamed to **magento_fuim_key.php** in the directory

```
<magento root>/app/code/local/Breincoach
```

It is OK to overwrite the trial key.

There is a slight possibility that you get an Access Denied message instead of the above screen, or, in some rare cases, the Extras section does not become visible

Some of you may encountered this problem. You install new Magento extension through downloader, try to access its configuration settings and Magento throws "Access denied" page at you or does not show the menu entry. Although you're administrator of the system.

So what happened here? Magento just doesn't have stored privileges for this new extension. **First just try to logout and login again.** If that doesn't work, you need to reset admin privileges.

Navigate to System->Permissions->Roles and click Administrators role.
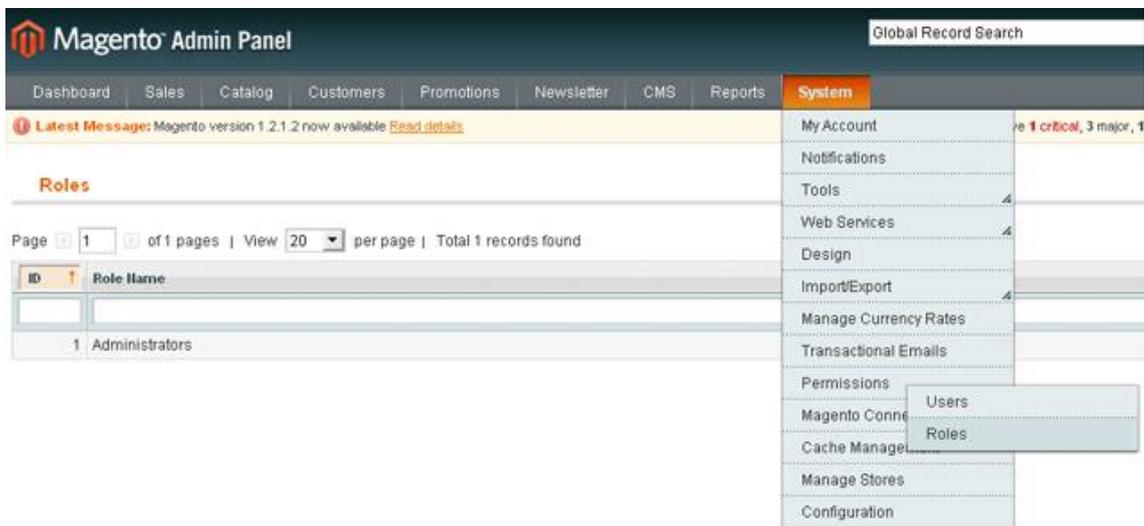
Check your Role Resources settings just in case,. Resource Access dropdown should be already set to All for administrators.

Without changing anything just click "Save Role" button, so that Magento re-saves all permissions.

You should be able to access your new extension now without problems.

APPENDIX B: FAQ

1. The websites must be on the same domain. The system depends on cookies and for security reasons a program or Browser cannot set cookies for another domain

2. If you want to integrate more than Magento and the helpdesk then, if Joomla is also part of the setup, you can use the open source component for Joomla by JFusion (www.jfusion.org). We have been part of this projec t from its early days and continue to sponsor it by devoting much of our free time. Breincoach sells a Kayako Helpdesk v4 plugin for JFusion. See our website for more details or contact us at info@breincoach.eu.