

# LunaDesk, Luna AI & LunaCards Complete Visual Guide.

Comprehensive step-by-step handbook covering the Customer Self-Service Portal, Agent Workspace, Private Local Luna AI Copilot, Omnichannel Setup, System Administration, and LunaCards Digital Identity Suite.

✓ Customer Portal & Help Center

✓ Agent Workspace & Luna AI Copilot

✓ Omnichannel Email, Chat & WhatsApp

✓ Full System & Security Admin

✓ LunaCards QR & Lead Capture

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| 4.1 Web Portal Channel                  | <a href="https://support.fmtasia.com/#channels/web">support.fmtasia.com/#channels/web</a>                         | 4.2 Embeddable Website Support Form  | <a href="https://support.fmtasia.com/#channels/form">support.fmtasia.com/#channels/form</a>                 |
| 4.3 Standard Email — IMAP / POP3 / SMTP | <a href="https://support.fmtasia.com/#channels/email">support.fmtasia.com/#channels/email</a>                     | 4.4 SMS Gateway Integration          | <a href="https://support.fmtasia.com/#channels/sms">support.fmtasia.com/#channels/sms</a>                   |
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| 4.7 Microsoft 365 Graph API Email       | <a href="https://support.fmtasia.com/#channels/microsoft_graph">support.fmtasia.com/#channels/microsoft_graph</a> | 4.8 Microsoft 365 Legacy IMAP Email  | <a href="https://support.fmtasia.com/#channels/microsoft365">support.fmtasia.com/#channels/microsoft365</a> |
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|                                                         |                                                                                                                       |                                                 |                                                                                                     |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------------|
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## Chapter 6: Administrator Reference — System Architecture

|                                          |                                                                                                             |                                                 |                                                                                                           |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| 6.1 Enterprise Integrations Hub          | <a href="https://support.fmtasia.com/#system/integration">support.fmtasia.com/#system/integration</a>       | 6.2 REST API & Personal Access Tokens           | <a href="https://support.fmtasia.com/#system/api">support.fmtasia.com/#system/api</a>                     |
| 6.3 Custom Objects & Schema Manager      | <a href="https://support.fmtasia.com/#system/object_manager">support.fmtasia.com/#system/object_manager</a> | 6.4 Core Workflows / Dynamic Conditional Forms  | <a href="https://support.fmtasia.com/#system/core_workflow">support.fmtasia.com/#system/core_workflow</a> |
| 6.5 UI Translations & Custom Terminology | <a href="https://support.fmtasia.com/#system/translation">support.fmtasia.com/#system/translation</a>       | 6.6 Data Privacy & GDPR / PDPA Right-to-Erasure | <a href="https://support.fmtasia.com/#system/data_privacy">support.fmtasia.com/#system/data_privacy</a>   |
| 6.7 Maintenance Mode & System Broadcasts | <a href="https://support.fmtasia.com/#system/maintenance">support.fmtasia.com/#system/maintenance</a>       | 6.8 Health Monitoring & Prometheus/Zabbix Token | <a href="https://support.fmtasia.com/#system/monitoring">support.fmtasia.com/#system/monitoring</a>       |
| 6.9 Addon Packages Manager               | <a href="https://support.fmtasia.com/#system/package">support.fmtasia.com/#system/package</a>               | 6.10 Active User Sessions                       | <a href="https://support.fmtasia.com/#system/sessions">support.fmtasia.com/#system/sessions</a>           |
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| 6.13 Platform Version & Release Status   | <a href="https://support.fmtasia.com/#system/version">support.fmtasia.com/#system/version</a>               |                                                 |                                                                                                           |

## Chapter 7: LunaCards Digital Business Card & Event Suite

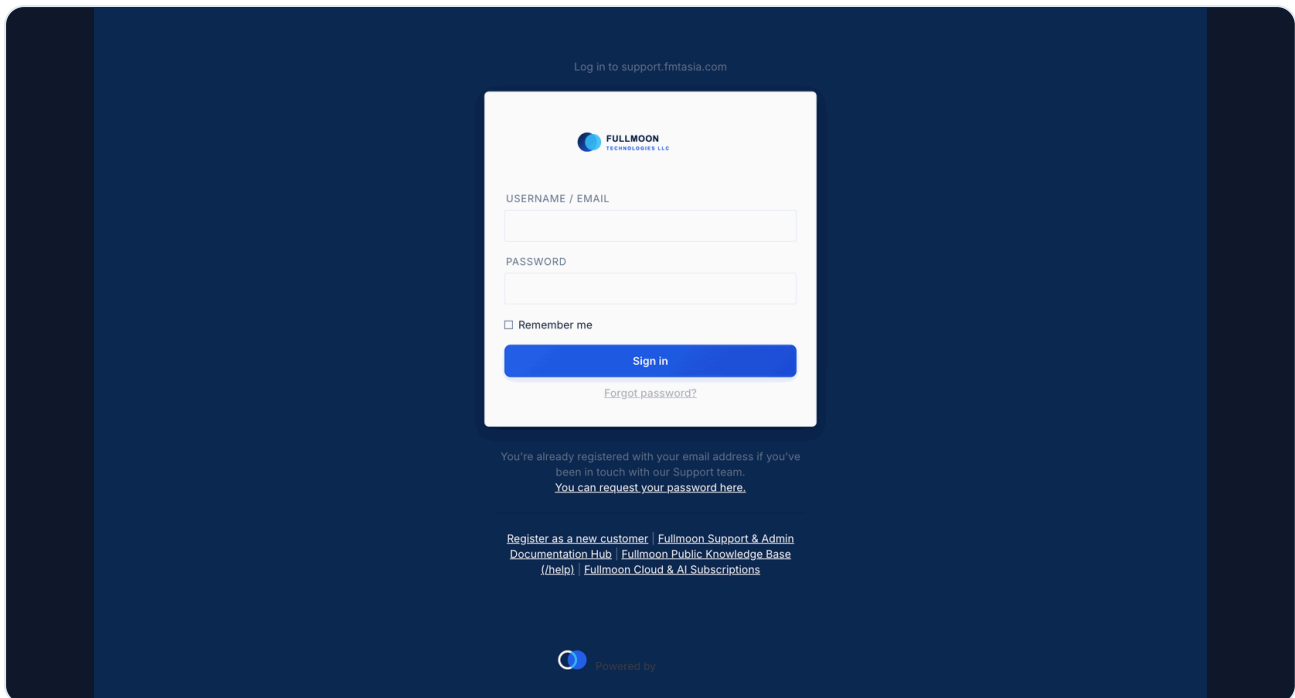
|                                                               |                                                                                         |                                     |                                                                                   |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------|-------------------------------------|-----------------------------------------------------------------------------------|
| 7.1 LunaCards — Executive Digital Business Card & Web QR Mode | <a href="https://card.fmtasia.com/julian">card.fmtasia.com/julian</a>                   | 7.2 Offline Phonebook vCard QR Mode | <a href="https://card.fmtasia.com/julian#vcard">card.fmtasia.com/julian#vcard</a> |
| 7.3 Two-Way Event Lead Exchange & /admin CSV Export           | <a href="https://card.fmtasia.com/julian#exchange">card.fmtasia.com/julian#exchange</a> |                                     |                                                                                   |

# Customer Self-Service Portal & Help Center

Step-by-step visual guide for external clients and organization managers using [support.fmtasia.com](https://support.fmtasia.com) and the Public Knowledge Base (/help).

## 1.1 — Portal Login, Self-Registration & Public Quick Links

The unified entry point for both client users (Customers) and support engineers (Agents/Admins). Branded with the Fullmoon Technologies dual-moon identity, it supports password authentication, Single Sign-On (SSO via Microsoft Entra ID, Google Workspace, or SAML 2.0), self-service account registration, password recovery, and curated Public Quick Links.



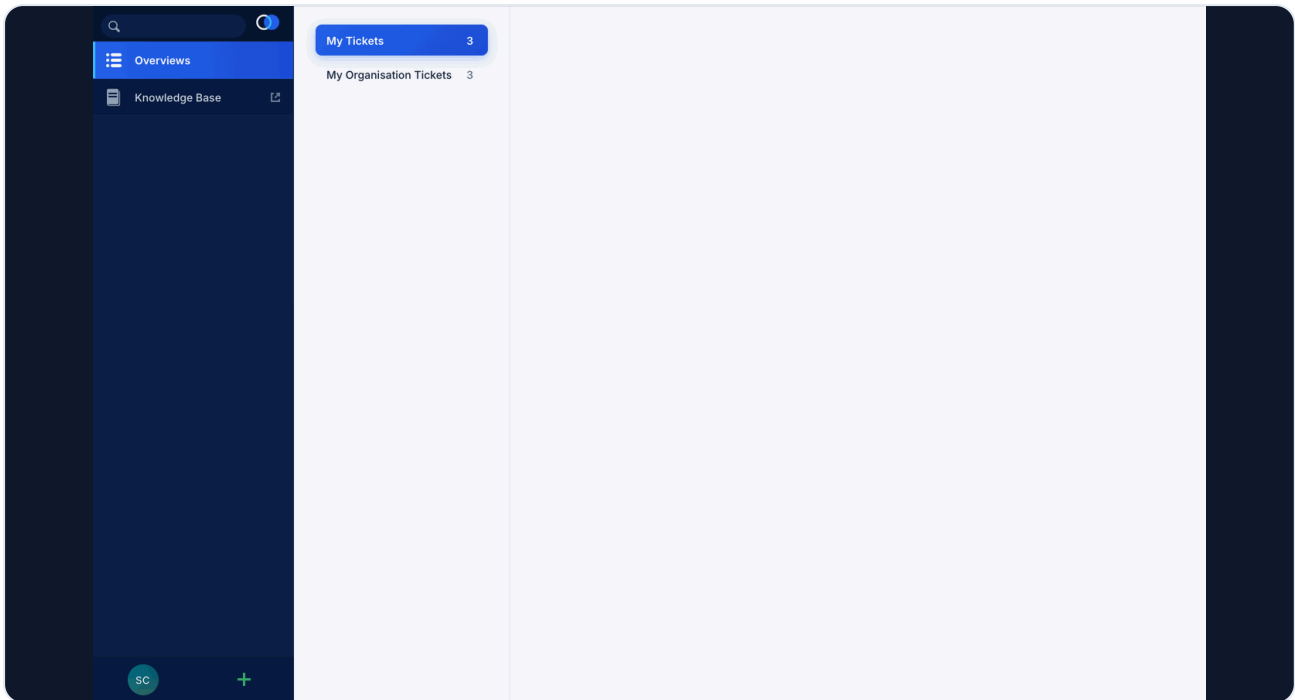
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Sign In (Username / Email & Password):** Enter your registered corporate or school email address and password. If your organization uses SSO (configured under **Settings** → **Security** → **Third-Party Applications**), click the corresponding SSO provider button below the login form.
- 2. New User Self-Registration (Create a new account):** When enabled by the administrator, new external users can register an account directly, receive an automated email verification link, and immediately get mapped to their Organization based on their email domain (e.g., @stxavier.edu).
- 3. Password Recovery (Forgot your password?):** Sends a time-limited cryptographic reset token via your configured outbound SMTP/Microsoft 365 channel.
- 4. Public Quick Links Strip:** Displays administrator-curated links (managed under **Manage** → **Public Links**) at the bottom of the login screen so visitors can jump straight to the Public Knowledge Base (/help) or documentation hub without logging in.

 **Best-Practice Tip:** Enable Domain-Based Organization Mapping (**Manage** → **Organizations**) before turning on self-registration so every verified user from a client domain automatically inherits their company's SLA and shared ticket visibility.

## 1.2 — Customer Self-Service Dashboard (My Tickets & My Organisation Tickets)

Gives external clients a clean, zero-clutter self-service portal where they can track their own open and resolved requests (My Tickets) as well as all tickets submitted by colleagues across their company or school (My Organisation Tickets) when Shared Organization visibility is enabled.



### STEP-BY-STEP CONFIGURATION & USAGE

1. **My Tickets Queue:** Lists every ticket where the logged-in customer is the primary requester, displaying the Ticket Number (#63012), Subject Title, real-time Lifecycle State (new, open, pending reminder, closed), and Creation Timestamp.
2. **My Organisation Tickets Queue:** Appears automatically when the customer belongs to an Organization with Shared Organization = Yes. Allows IT Directors, School Principals, or Procurement Leads to audit every ticket opened by their team members.
3. **Color-Coded Status Indicators:** Orange/Amber circles indicate active open tickets awaiting action; grey circles indicate tickets in a paused pending reminder or resolved state.
4. **Instant Search & Theme Switcher:** Customers can search across all their historical tickets using the top-left search bar or toggle between Executive Light Mode and High-Contrast Dark Mode from their bottom-left avatar menu.

**Best-Practice Tip:** Internal agent notes and Luna AI triage drafts (marked with the orange-striped Internal border) are strictly hidden from the Customer Portal—customers only see public replies.

## 1.3 — Submitting a New Customer Support Ticket

The structured ticket submission form for external customers. Captures the subject, target department/group, rich-text problem description, inline screenshots, and diagnostic file attachments.

The screenshot shows a mobile application interface for submitting a new support ticket. On the left is a dark blue sidebar with a search icon, a menu icon, and links to 'Overviews' and 'Knowledge Base'. The main content area is titled 'New Ticket' and contains the following fields: 'TITLE \*' (a text input), 'TEXT' (a rich-text editor with a 'select attachment...' link), 'GROUP \*' (a dropdown menu), and 'STATE' (a dropdown menu with 'new' selected). At the bottom of the form are two buttons: 'Cancel & Go Back' and 'Create'. To the right of the form is a sidebar with the heading 'What can you do here?' and a right arrow. Below the heading is a paragraph: 'The way to communicate with us is this thing called "ticket". Here you can create one.' The sidebar also contains an information icon 'i'.

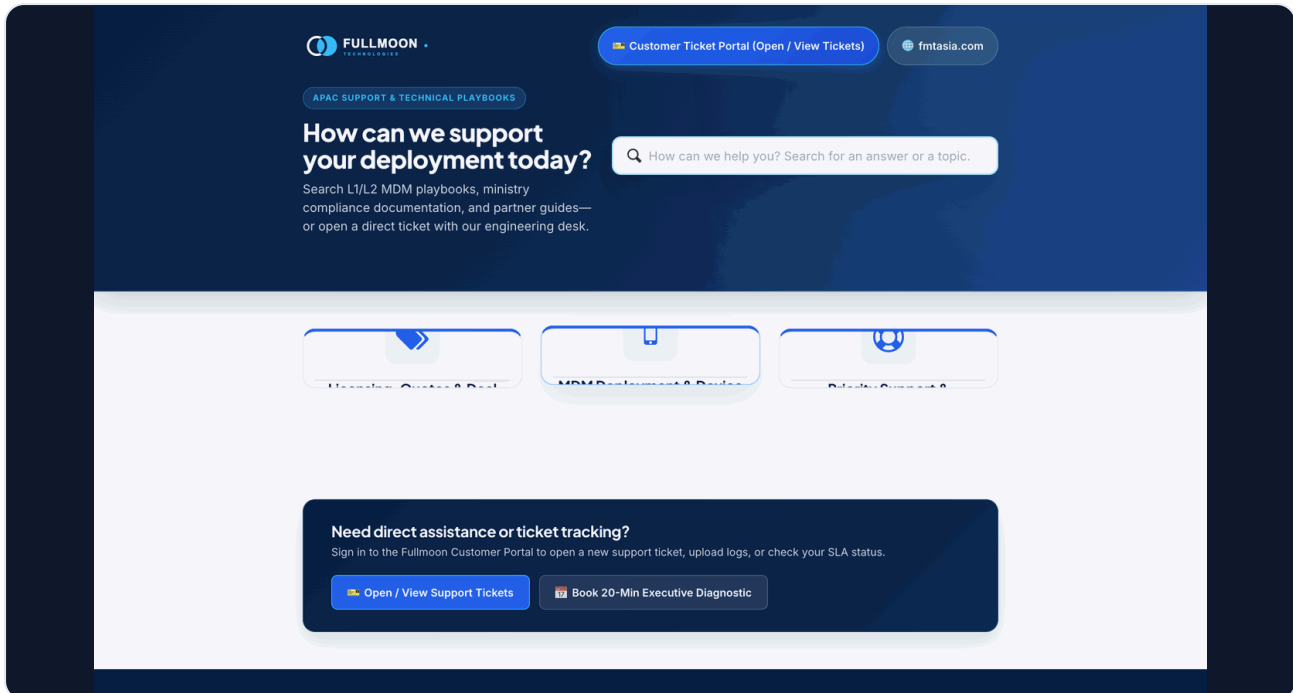
### STEP-BY-STEP CONFIGURATION & USAGE

1. **Title (Subject):** Enter a concise summary of the issue or request (e.g., *VLAN 40 Classroom Wi-Fi Certificate & Chrome Filter Sync*).
2. **Group (Department / Desk):** Select which specialized team should receive the request (unless pre-assigned via Core Workflows). Administrators control which Groups are selectable by customers under Channels → Web.
3. **Rich-Text Body & Inline Screenshots:** Customers can paste screenshots directly from their clipboard (Cmd+V / Ctrl+V), format code/logs, or click `select attachment...` to upload PDFs, configuration files, or log bundles.
4. **Submit & Instant Luna AI Triage:** Clicking **Create** assigns a unique FMT# ticket number, dispatches an immediate confirmation email, starts the Organization's SLA timer, and triggers the local **Luna AI Copilot** in the background.

💡 **Best-Practice Tip:** Use System → Core Workflows if you want to show custom fields (such as 'Device OS' or 'Affected Campus') dynamically only when a customer selects 'IT Operations'.

## 1.4 — Public Multilingual Knowledge Base & Help Center (/help)

Your public-facing 24/7 self-service documentation portal. Styled in Fullmoon Technologies' Royal Navy & Electric Blue design system, it deflects common L1 inquiries before a ticket is ever created.



### STEP-BY-STEP CONFIGURATION & USAGE

1. **Instant Full-Text Search Bar:** Searches across all published Knowledge Base categories, article titles, body content, and keywords in real time.
2. **3-Column Category Cards:** Organizes documentation into intuitive functional pillars (e.g., *1:1 Classroom & Device Management, AI Concierge & Smart Helpdesk, Account, SLA & Commercial Billing*).
3. **Direct Escalation Header & Bottom CTA Banner:** Provides 1-click buttons to **Open a Support Ticket** or return to **fmtasia.com** if the user needs human engineering assistance.

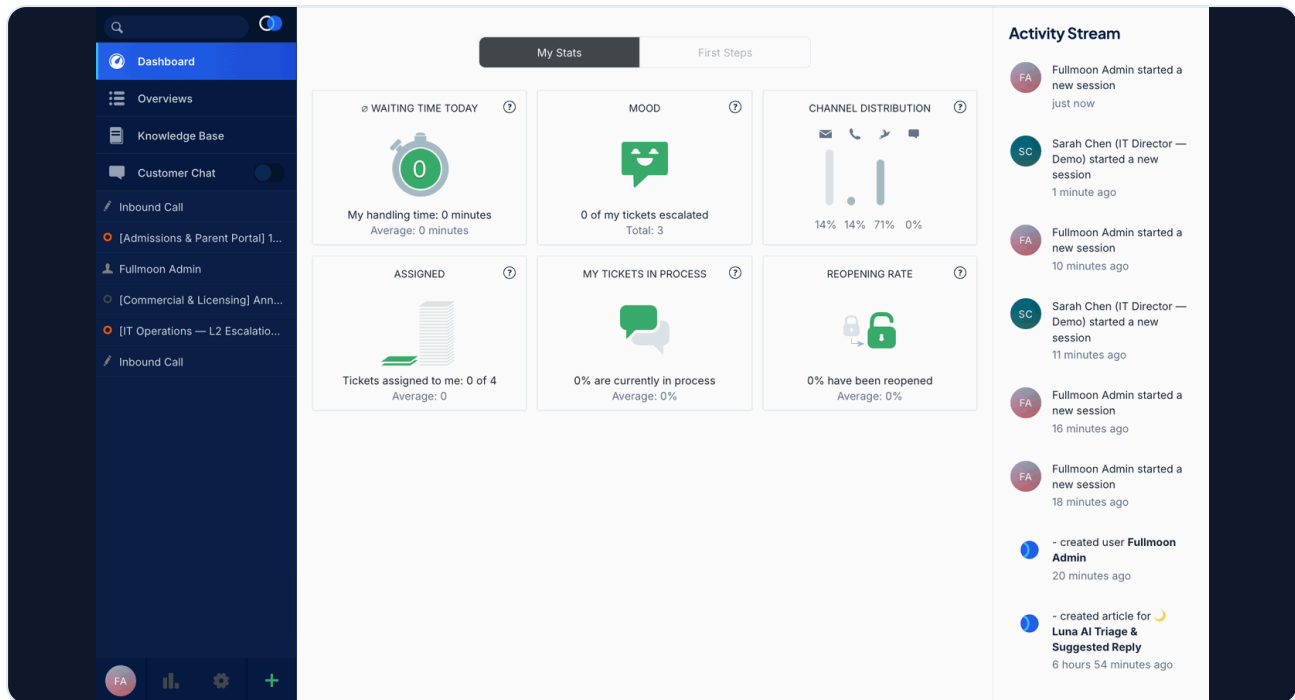
💡 **Best-Practice Tip:** Articles can be set to 'Internal Only' (visible only to logged-in Agents) or 'Public' (live on /help) inside the Knowledge Base editor.

## Daily Support Agent & Luna AI Copilot

How support engineers manage queues, review automated 🌙 Luna AI triage & draft replies, apply 1-click Templates & Macros, and use composer shortcuts (::, @@, ??).

## 2.1 — Agent Real-Time Dashboard & Live Activity Stream

The real-time operational command center for support engineers and team leads. Displays live KPI tiles alongside a chronological Activity Stream of every ticket creation, AI triage action, and customer reply across your assigned groups.



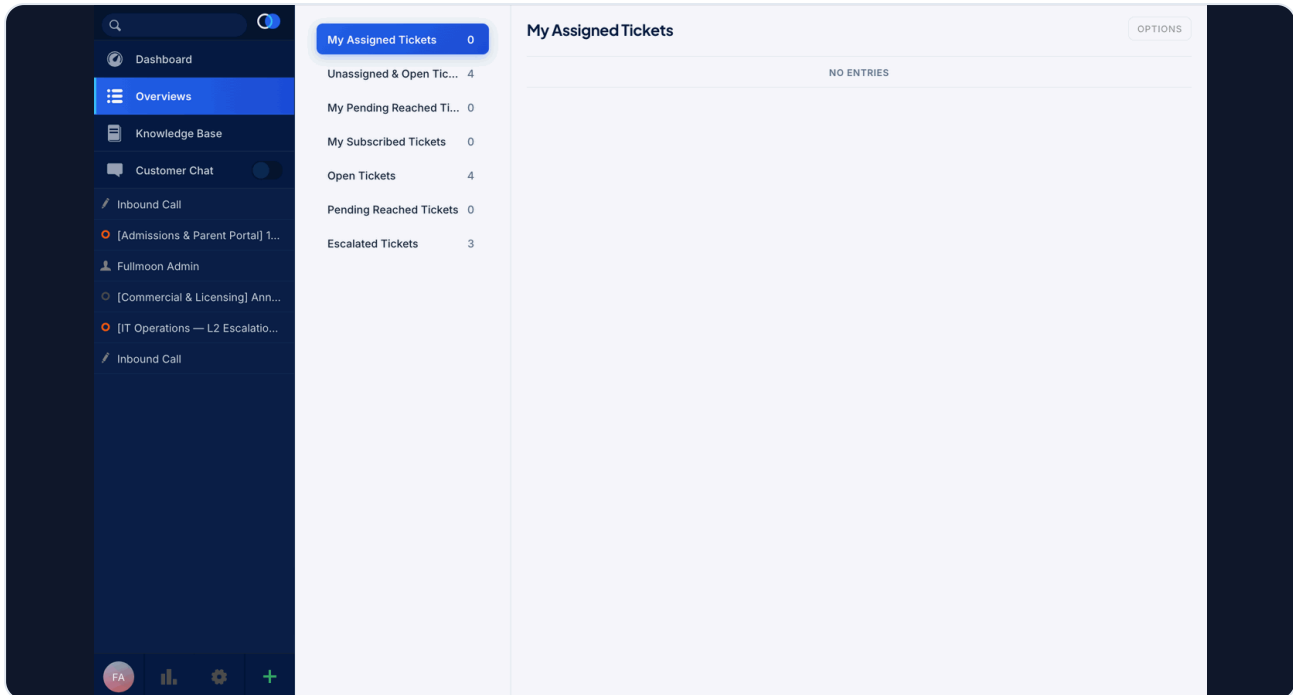
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Waiting Time Today (0 waiting time):** Tracks the average first-response waiting time for tickets handled by the logged-in agent today vs. team averages.
- 2. Mood & Escalation Health:** Turns green when zero assigned tickets are in SLA breach or warning state, and alerts immediately if any ticket approaches its SLA deadline.
- 3. Channel Distribution Graph:** Breaks down incoming ticket volume across Email, Phone/Inbound Call, Web Portal, and Live Chat / Social channels.
- 4. Assigned & In-Process Counters:** Shows your personal ticket load vs. total team queue and tracks your 7-day ticket reopening rate.
- 5. Right-Hand Live Activity Stream:** Updates in real time via WebSockets whenever a customer replies, a colleague updates a ticket, or 🌙 **Luna AI** posts an automated triage summary.

💡 **Best-Practice Tip:** Click any event in the right-hand Activity Stream to jump straight into that ticket article.

## 2.2 — Agent Ticket Overviews & SLA Queue Matrix

Organizes all active tickets into role-based, real-time filtered queues (Overviews) in the secondary left sidebar. Each queue displays customizable columns, priority indicators, and live SLA countdown timers.



### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Role-Based Queue Navigation:** Switch seamlessly between Open Tickets, Pending Reminder, Escalated (SLA Warning/Breach), My Assigned Tickets, and isolated queues such as Demo Sandbox (Interactive Trial).
- 2. Bulk Actions & Multi-Select:** Check multiple tickets in any overview list and drag them onto a Macro or update their State, Priority, Group, or Owner simultaneously.
- 3. Column Sorting & Instant Preview:** Sort by Priority, Customer, Organization, Created Date, or Next SLA Escalation timestamp.

 **Best-Practice Tip:** Administrators can create custom Overviews per department or VIP account under Manage → Overviews.

## 2.3 — Agent New Ticket Composer & 1-Click Ticket Templates

Allows agents to log inbound phone calls, walk-up requests, or proactive outbound emails/tickets on behalf of a customer—and populate every field in 1 click using pre-built Ticket Templates.

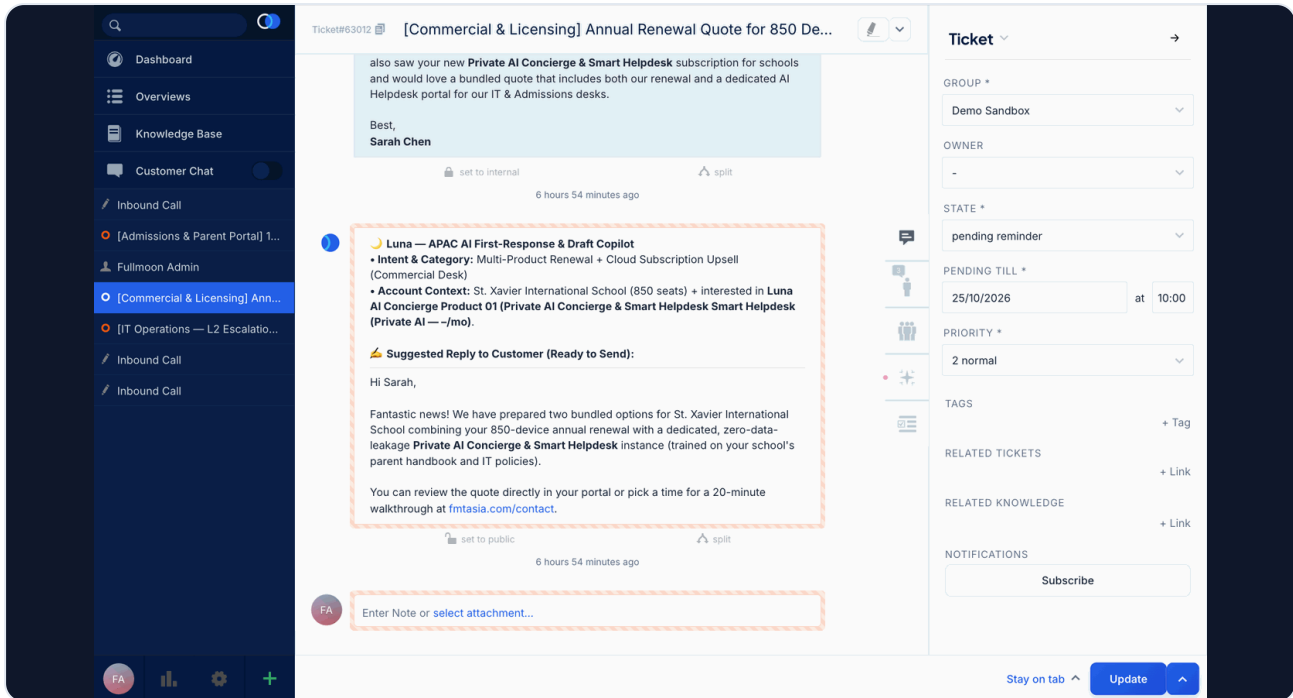
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Channel Type Selector (Received Call / Outbound Call / Send Email):** At the top of the composer, choose whether you are logging an inbound phone call, placing an outbound call, or sending an email notification to the customer.
- 2. Right-Hand Templates Sidebar (1-Click Load):** Select any pre-configured scenario (such as *1. School IT — 1:1 Device & Policy Sync Issue* or *3. Commercial — Annual Renewal & AI Helpdesk Quote*) and click **Apply** to auto-fill the Title, Customer, Group, Priority, Tags, and structured Body.
- 3. Customer Lookup & Inline Creation:** Search by name, email, or organization—or click + **New Customer** to create a contact record on the fly.

**Best-Practice Tip:** Use Templates for recurring incident types or onboarding workflows so every ticket starts with complete structured metadata and tags.

## 2.4 — Ticket Detail View, Luna AI Internal Triage Note & Composer Shortcuts

The core agent workspace where engineers review the conversation thread, read the automated \*\*🌙 Luna AI First-Response & Draft Copilot\*\* internal note, execute 1-click Macros, track Checklists/Time Accounting, and send public replies.



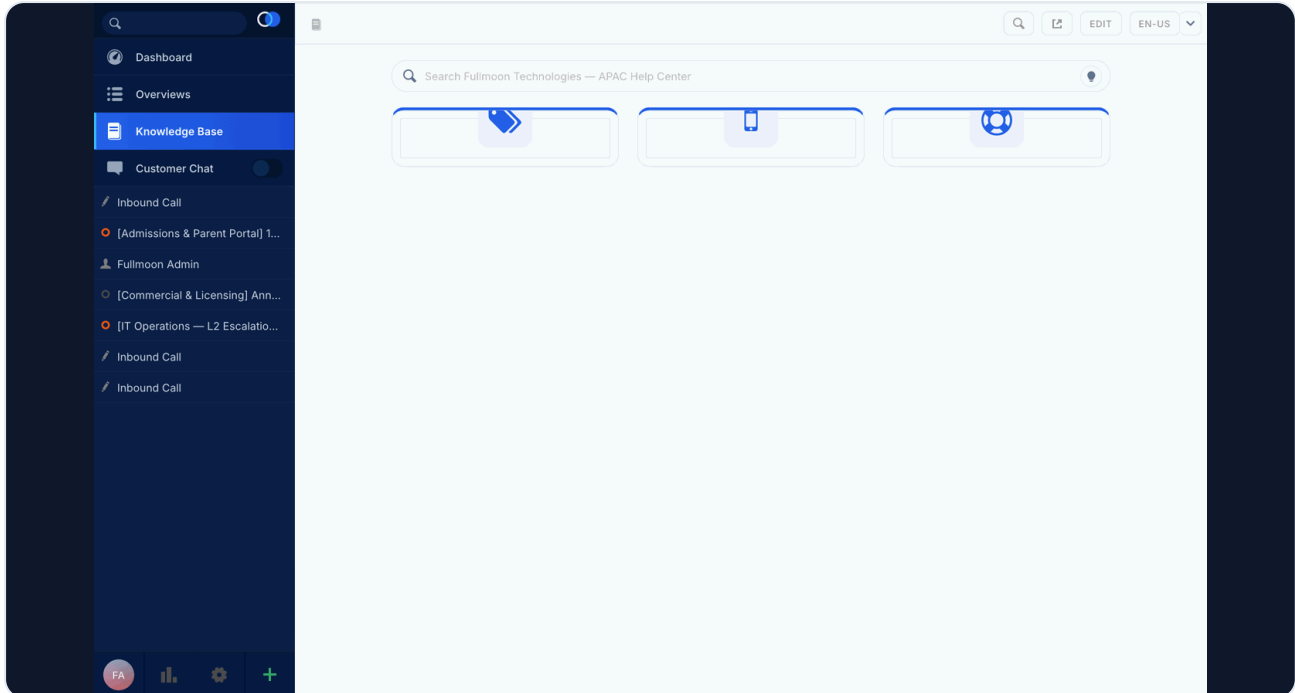
### STEP-BY-STEP CONFIGURATION & USAGE

- Customer Message vs. Internal Note (Orange Striped Border):** Customer messages appear in clean blue/slate bubbles. Internal notes—including the 🌙 **Luna AI Automated Triage & Draft Reply**—are framed with an unmistakable **orange-striped border** and lock icon (internal), guaranteeing they are never visible to external customers.
- Using the Luna AI Draft Copilot:** Within 3–8 seconds of a ticket arriving, Fullmoon's local Ollama engine (`fullmoon-apac:latest`) analyzes the customer's message, identifies the intent & account context, and writes a ready-to-send reply inside an internal note. Agents simply copy the suggested reply into a Public Email/Note reply, review, and click **Update**.
- Right-Hand Sidebar Tabs (5 Icons):** Switch between **Ticket Attributes** (Group, Owner, State, Priority, Tags, Related KB), **Customer & Organization Profile** (showing lifetime open/closed ticket counts), **AI Assistant / Summary**, and **Interactive Checklists**.
- Composer Power Shortcuts (: :, @@, ??):** Inside the reply box, type `::` to insert a pre-approved Text Module snippet, type `@@` to mention and notify a colleague, or type `??` to search and insert a clickable Knowledge Base article URL.

💡 **Best-Practice Tip:** Click the 'set to internal' / 'set to public' toggle below any note if you ever need to convert visibility, or click 'split' to break a tangential customer request into a separate linked ticket.

## 2.5 — Internal Knowledge Base Editor & Multilingual Publishing

Allows agents and documentation leads to author, organize, translate, and publish Knowledge Base articles directly inside the helpdesk workspace without switching tools.



### STEP-BY-STEP CONFIGURATION & USAGE

1. **Category & Sub-Category Hierarchy:** Create nested categories with custom icons and ordering.
2. **Rich-Text Editor, Video Embeds & File Attachments:** Write step-by-step guides with callout boxes, code blocks, inline images, and downloadable configuration files.
3. **Granular Visibility Controls (Hidden / Internal / Public):** Save drafts as **Hidden**, publish internal SOPs as **Internal** (searchable by agents via ?? and by Luna AI), or publish as **Public** so they appear immediately on [support.fmtasia.com/help](https://support.fmtasia.com/help).

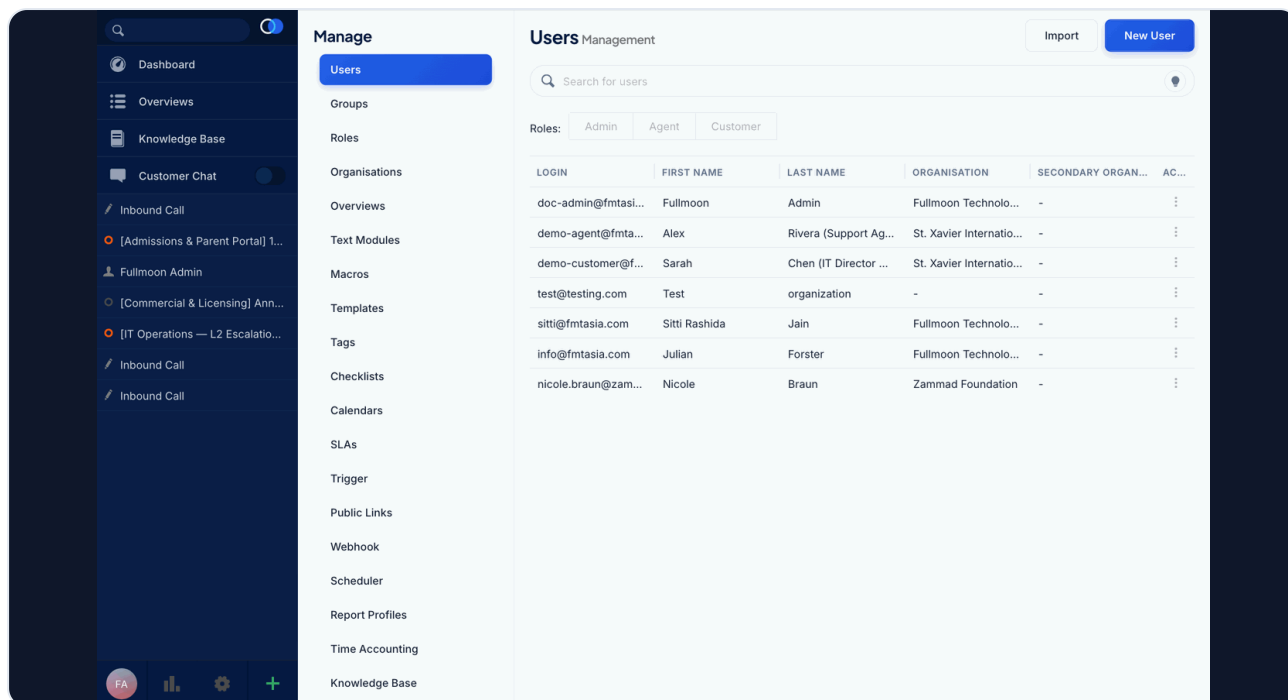
💡 **Best-Practice Tip:** Every resolved complex ticket can be converted into a draft Knowledge Base article in one click using the AI Knowledge Base Assistant.

## Administrator Reference — Manage

Users, Groups, Roles, Organizations, Overviews, Text Modules, Macros, Templates, Tags, Checklists, Calendars, SLAs, Triggers, Public Links, Webhooks, Scheduler, Report Profiles, Time Accounting, and Knowledge Base.

## 3.1 — Users Management (Manage → Users)

Central directory of every human and service account in the platform—including Administrators, Support Agents, and External Customers.



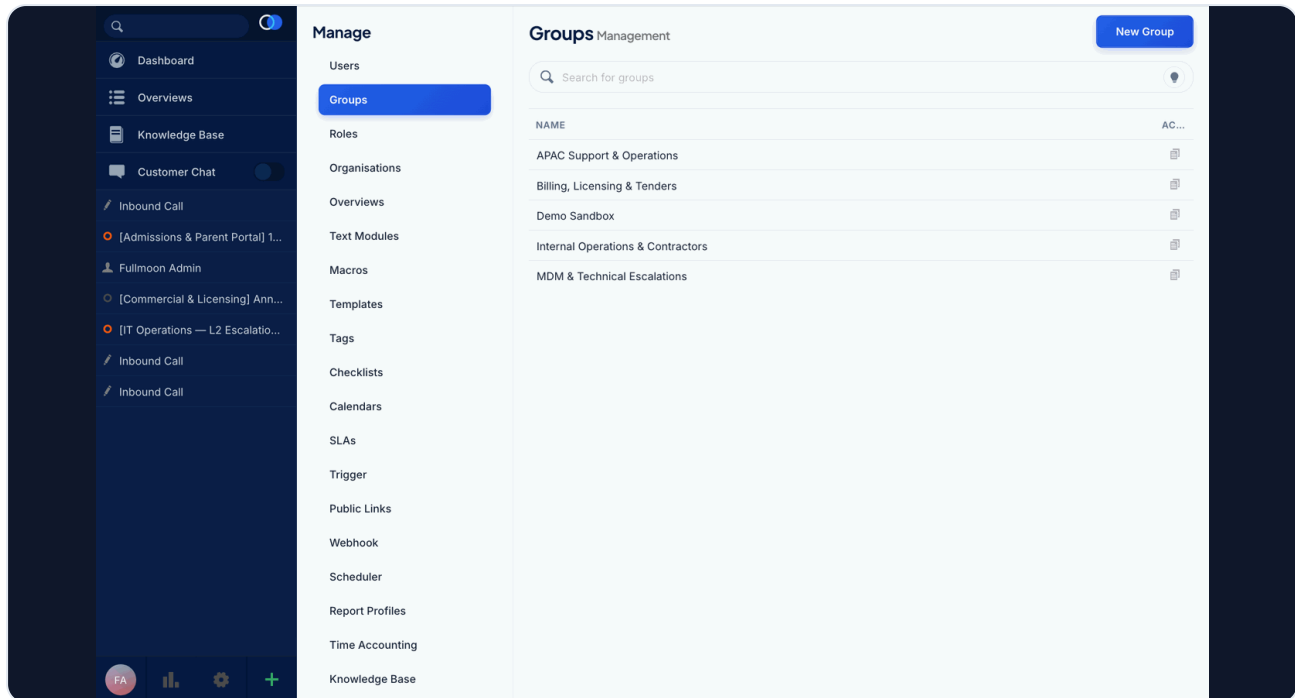
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Search, Filter & CSV Export/Import:** Search across thousands of users by name, email, role, or organization.
- 2. Creating & Editing Users (New User):** Assign First/Last Name, Email, Phone, Organization affiliation, VIP status toggle, and Role memberships (Admin, Agent, Customer).
- 3. Granular Group Permissions Matrix:** When assigning the Agent role to a user, you can grant granular per-group access levels (Read, Create, Change, Overview, Full) so an L1 agent only sees their assigned department queues.
- 4. View From User's Perspective (Impersonate):** Administrators can click the eye icon next to any user to preview the exact portal and queues that user sees—invaluable when auditing customer portal permissions.

**Best-Practice Tip:** Never delete former employees who handled historical tickets—set their account toggle to 'Inactive' instead so historical audit logs and ticket attributions remain intact.

## 3.2 — Groups / Department Queues (Manage → Groups)

Defines the functional departments, support tiers, or isolated tenant queues that own tickets (e.g., Users / General Support, L2 Technical & Infrastructure, Commercial & Licensing, Demo Sandbox).



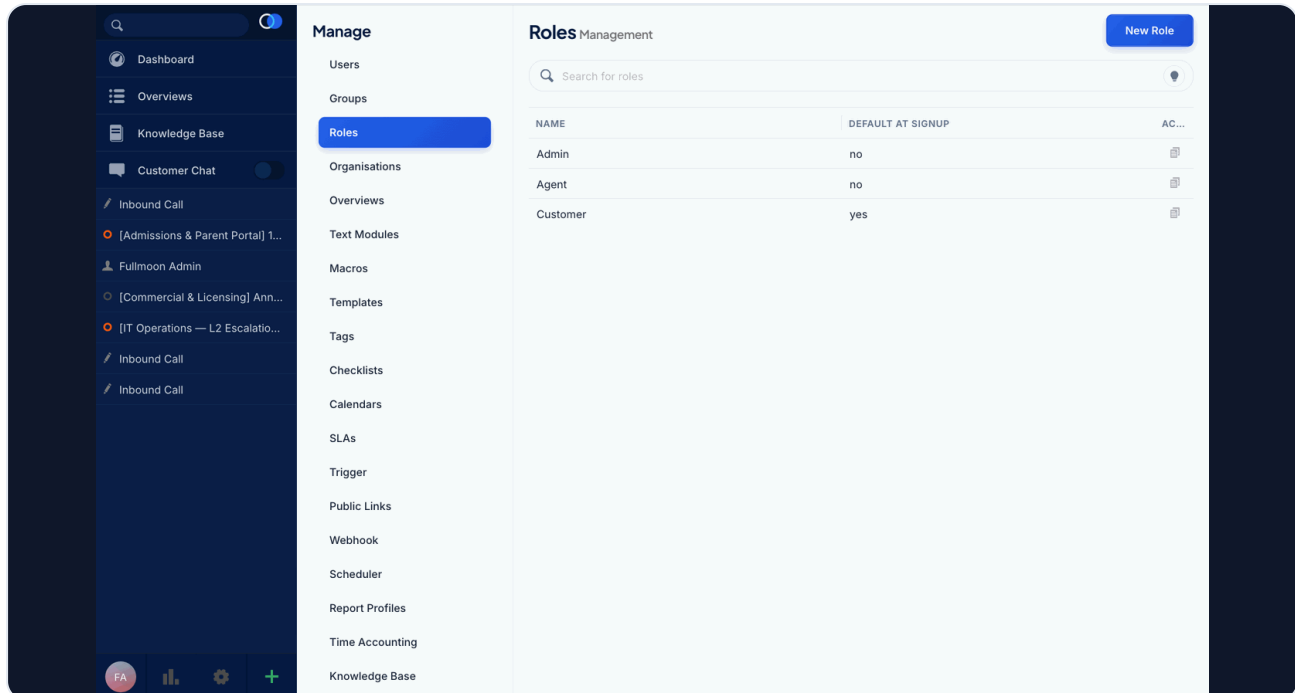
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Outbound Email Address & Signature Binding:** Map each Group to its own sender email address (e.g., support@fmtasia.com VS. billing@fmtasia.com) and outbound HTML signature.
- 2. Auto-Assignment Timeout & Reopen Behavior:** Configure whether tickets reopened after a customer reply stay with the previous owner or return to the unassigned group pool after X minutes.
- 3. Shared Drafts Toggle:** Enable Shared Drafts so an L1 engineer can prepare a draft reply inside a ticket and a senior L2 engineer can review and send it.

💡 **Best-Practice Tip:** Use hierarchical group naming (e.g., 'Tier 1::General', 'Tier 2::Infrastructure') to keep large multi-country operations organized.

## 3.3 — Roles & Granular RBAC Permissions (Manage → Roles)

Role-Based Access Control (RBAC) engine that governs exactly which features, admin modules, and ticket actions a user is permitted to access.



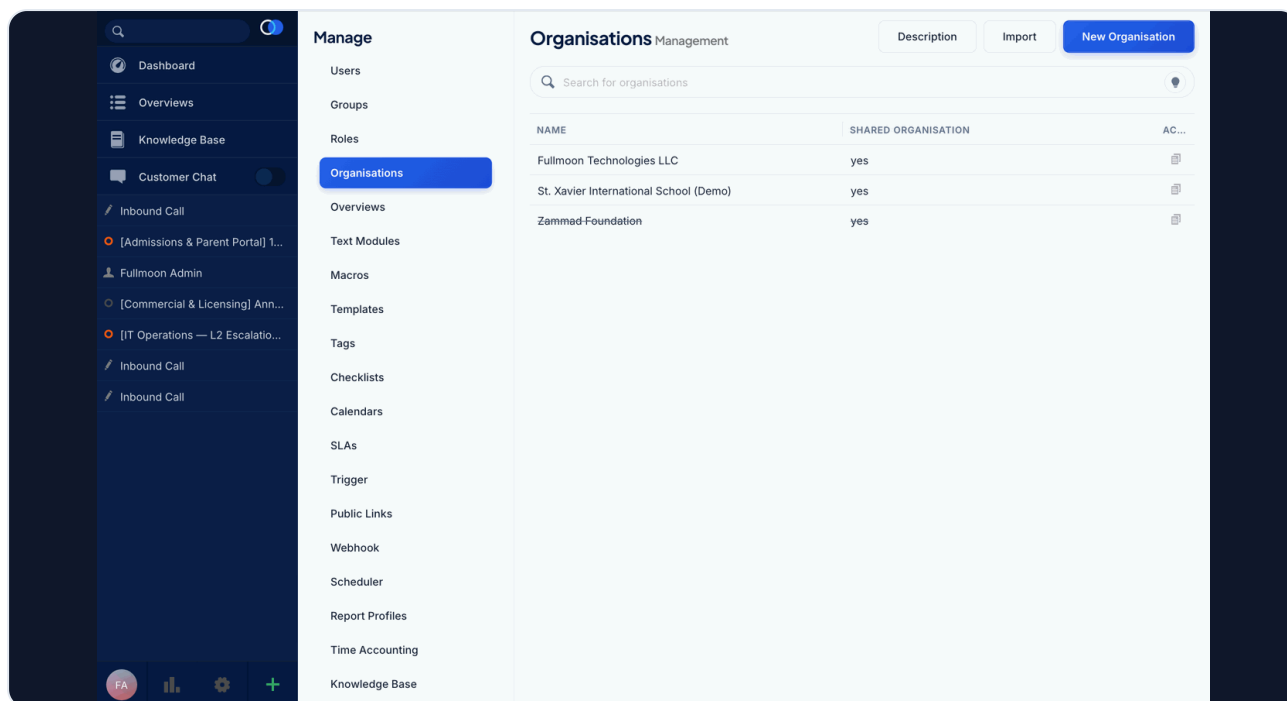
### STEP-BY-STEP CONFIGURATION & USAGE

- Built-in vs. Custom Roles:** Out of the box, LunaDesk includes Admin, Agent, and Customer. You can clone or create custom roles such as Team Lead (Read-Only Admin + Reports) or Knowledge Base Editor.
- Sub-Permission Checkboxes:** Expand Admin, Ticket, Chat, Knowledge Base, and Report trees to grant only specific admin screens (e.g., allowing a manager to edit Macros and Text Modules without exposing Security or System settings).
- Default at Signup:** Specify which role (always Customer) is automatically assigned when an external user self-registers.

**Best-Practice Tip:** Granting a user both 'Agent' and 'Customer' roles should be avoided—keep 'Agent' accounts distinct from external 'Customer' test accounts so SLA timers calculate accurately.

## 3.4 — Organizations & Domain Auto-Mapping (Manage → Organizations)

Groups individual customer contacts under their corporate, school, or ministry account entity (e.g., Fullmoon Technologies, St. Xavier International School — Demo, Ministry of Education).



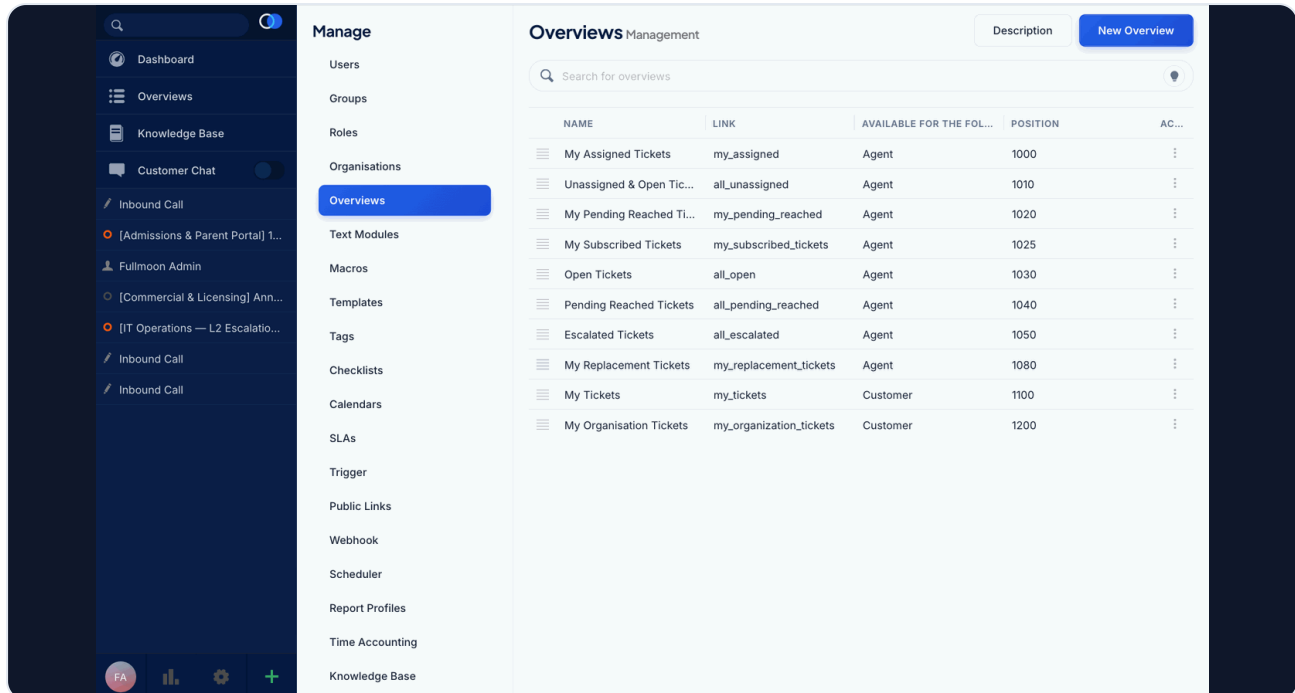
### STEP-BY-STEP CONFIGURATION & USAGE

- Domain-Based Auto-Assignment (Domain + Domain assignment):** Set Domain = stxavier.edu and Domain assignment = Yes. Every future email or self-registration from \*@stxavier.edu is automatically linked to that Organization.
- Shared Organization Visibility (Shared organization = Yes):** Enables the **My Organisation Tickets** tab in the Customer Portal so all members of that client organization (or designated VIP contacts) can view their company's collective ticket queue.
- VIP Organization Flag & Contract Notes:** Mark strategic accounts as VIP = Yes and store contract/subscription notes that appear automatically in the right-hand sidebar of every ticket from that client.

**Best-Practice Tip:** Combine Organization VIP flags with SLAs (Manage → SLAs) to enforce 15-minute response times exclusively for Enterprise contract holders.

## 3.5 — Overviews / Queue Views (Manage → Overviews)

Builds and orders the real-time filtered ticket queues displayed in the left sidebar for Agents and Customers.



### STEP-BY-STEP CONFIGURATION & USAGE

- Condition Builder:** Filter tickets by any combination of State, Group, Priority, Organization, Owner, Tag, Pending Time, or Escalation timestamp (e.g., Group is Demo Sandbox AND State is open/new/pending).
- Role & User Visibility Restriction:** Choose which Roles (Agent, Customer) or specific individual users can see the Overview, and optionally restrict it to agents with access to the matching Groups.
- Table Columns, Grouping & Default Sort:** Pick up to 8 visible columns (Number, Title, Customer, Organization, Priority, State, SLA Escalation), group rows by Group or Priority, and set the display order priority.

**Best-Practice Tip:** Create a dedicated 'P1 & SLA Escalating Soon' Overview sorted by 'Escalation at (ascending)' at the top of your agents' sidebar so urgent tickets are never missed.

## 3.6 — Text Modules / Smart Snippets

### (Manage → Text Modules)

Manages the library of reusable, dynamic text blocks that agents summon inside the ticket reply composer by typing `::`.

The screenshot shows the 'Text Modules Management' interface. On the left is a sidebar with a navigation menu including Dashboard, Overviews, Knowledge Base, Customer Chat, and various admin tools. The main panel has a 'Manage' sidebar with options like Users, Groups, Roles, Organisations, and 'Text Modules' (which is highlighted). The main content area displays a table of text modules with columns for NAME, KEYWORDS, CONTENT, GROUPS, and an action column. Three modules are visible: 'Issue Resolved & Verifica...', 'MDM Diagnostic Informat...', and 'Priority Ticket Acknowled...'. A fourth module, 'L2 Firewall & VLAN W...', is partially visible at the bottom.

| NAME                         | KEYWORDS                         | CONTENT                                                                                                                                                                                                                         | GROUPS | AC... |
|------------------------------|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|-------|
| Issue Resolved & Verifica... | resolved, fixed, close           | Hello {{ticket.customer.firstname}}<br>Our engineering team has co<br>Please verify on your end and                                                                                                                             | -      | ⋮     |
| MDM Diagnostic Informat...   | mdm, logs, diagnostic            | Hello {{ticket.customer.firstname}}<br>To help our L2/L3 MDM engir<br>1. Instance / School Domain<br>2. Device OS & Version (And<br>3. Device Serial Number or E<br>4. Screenshot or short video<br>As soon as we receive these | -      | ⋮     |
| Priority Ticket Acknowled... | ack, received, priority          | Hello {{ticket.customer.firstname}}<br>Thank you for contacting Full<br>We will update you shortly wi                                                                                                                           | -      | ⋮     |
| L2 Firewall & VLAN W...      | firewall, vlan, ports, networ... | Hello,<br><br>To restore instant classro...<br>• TCP 443 → Cloud Polic...<br>• TCP 5228-5230 → Real...<br>• UDP 123 → NTP Time ...<br><br>Once whitelisted, affecte...<br><br>Best regards,<br>Fullmoon L2 Engineering...       | -      | ⋮     |

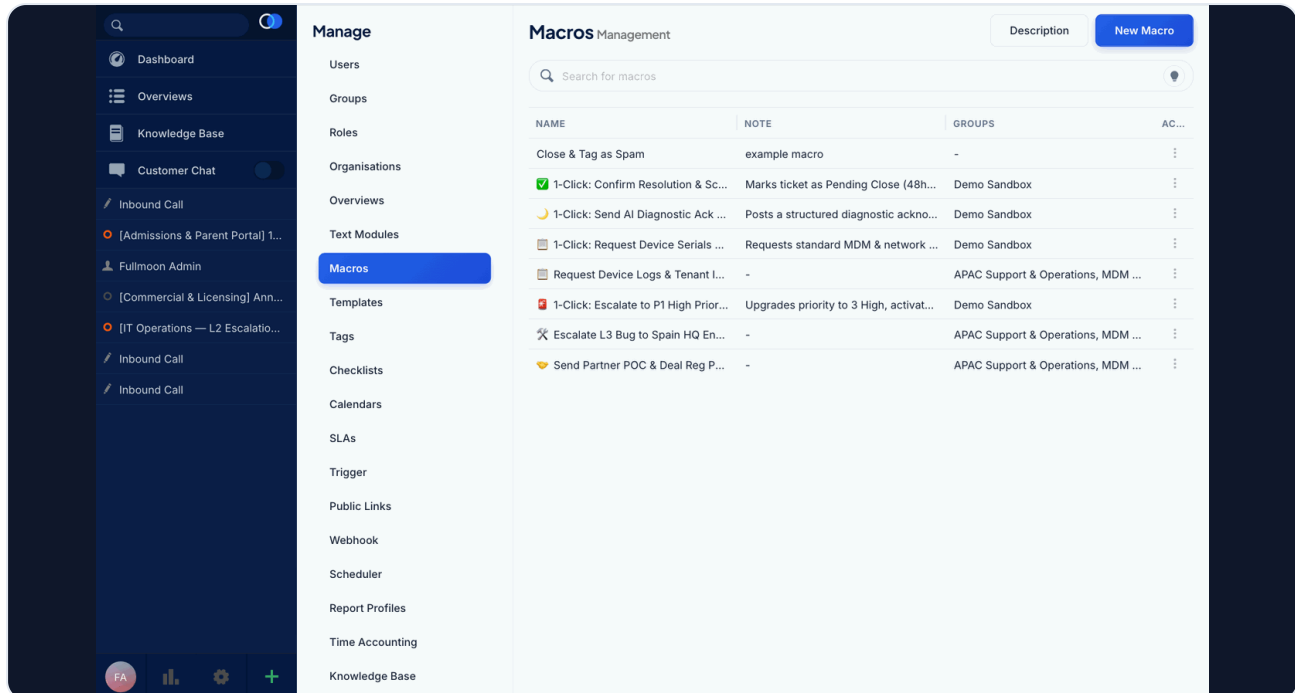
#### STEP-BY-STEP CONFIGURATION & USAGE

- Keywords & Shortcut Triggers:** Assign short memorable keywords (e.g., `sla`, `onboarding`, `wifi`, `close`) so typing `::wifi` filters immediately to the exact troubleshooting snippet.
- Dynamic Smart Variables:** Embed placeholders like `{{ticket.customer.firstname}}`, `{{ticket.number}}`, `{{ticket.organization.name}}`, and `{{user.firstname}}` that auto-populate with live data the instant the snippet is inserted.
- Group Scoping & CSV Import:** Restrict specific snippets to relevant departments (e.g., Billing snippets only in the Commercial group) or bulk-import hundreds of snippets via CSV.

**Best-Practice Tip:** Standardize your team's tone and technical accuracy by turning your top 20 most frequent answers into Text Modules with dynamic customer name variables.

## 3.7 — Macros / 1-Click Multi-Action Bundles (Manage → Macros)

Automates multi-step ticket updates into a single click—allowing an agent to append a note, change ticket state, set pending reminders, add tags, and reassign groups simultaneously.



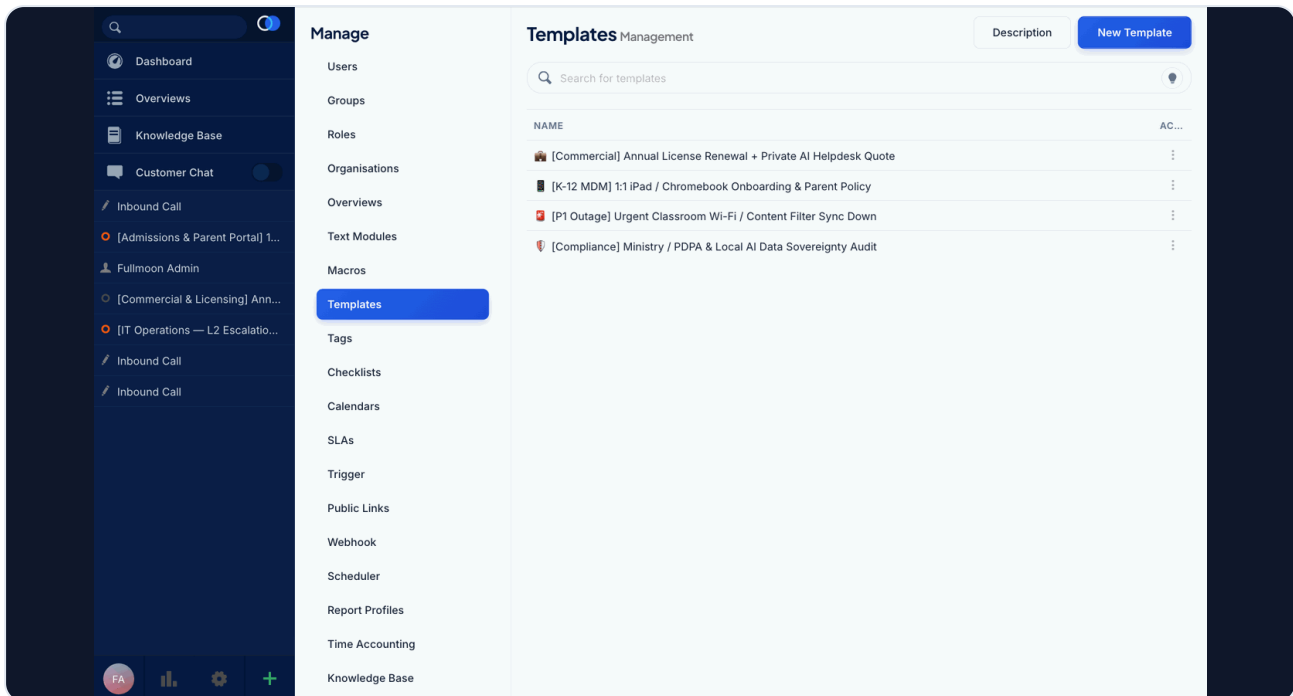
### STEP-BY-STEP CONFIGURATION & USAGE

- Multi-Attribute Action Builder:** Combine any sequence of actions: `State = pending reminder`, `Pending till = relative + 1 day`, `Priority = 3 high`, `Note = Internal/Public text`, and `Tags = add 'escalated_l2'`.
- UX Post-Execution Behavior:** Choose whether running the Macro saves and stays on the current ticket tab, closes the tab, or automatically opens the next ticket in the queue.
- Group Availability:** Scope Macros to specific Groups so agents only see Macros relevant to their desk.

💡 **Best-Practice Tip:** In the Ticket Overview list, agents can select 10 tickets at once and drag-and-drop them directly onto a Macro in the sidebar to execute batch updates!

## 3.8 — Ticket Templates (Manage → Templates)

Defines the 1-click pre-filled ticket forms displayed in the right-hand sidebar of the New Ticket (#ticket/create) screen.



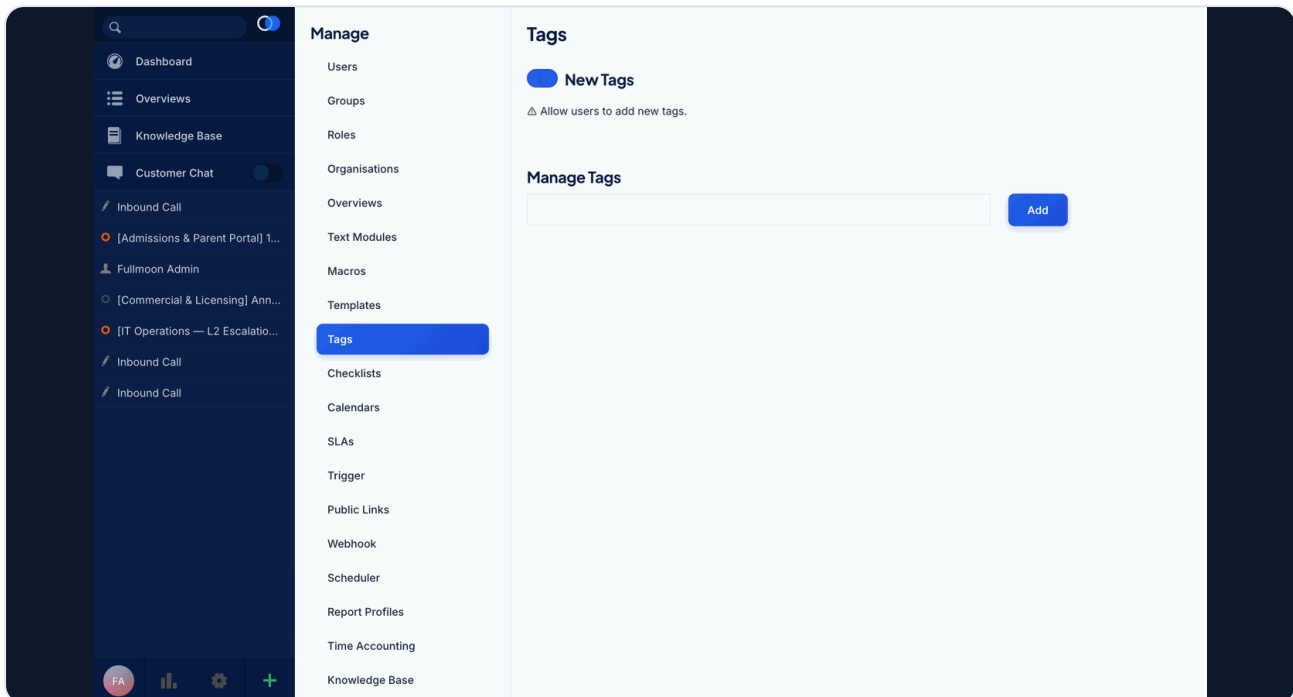
### STEP-BY-STEP CONFIGURATION & USAGE

1. **Pre-Populated Ticket Blueprint:** Store pre-configured values for Ticket Title, Customer, Group, Owner, State, Priority, Tags, and structured Body text.
2. **Live Demo & Rapid Call Logging:** Ideal for sales engineers running live demos (e.g., our 4 Demo Sandbox templates) and L1 agents logging standardized phone incidents or employee onboarding requests.

 **Best-Practice Tip:** Include a structured markdown/bulleted questionnaire in the Template Body so agents capture every required diagnostic detail during inbound calls.

## 3.9 — Tag Governance (Manage → Tags)

Controls the taxonomy of labels (`demo_sandbox`, `luna_ai_triaged`, `p1_incident`, `renewal_quote`) attached to tickets for filtering, SLA routing, and reporting.



### STEP-BY-STEP CONFIGURATION & USAGE

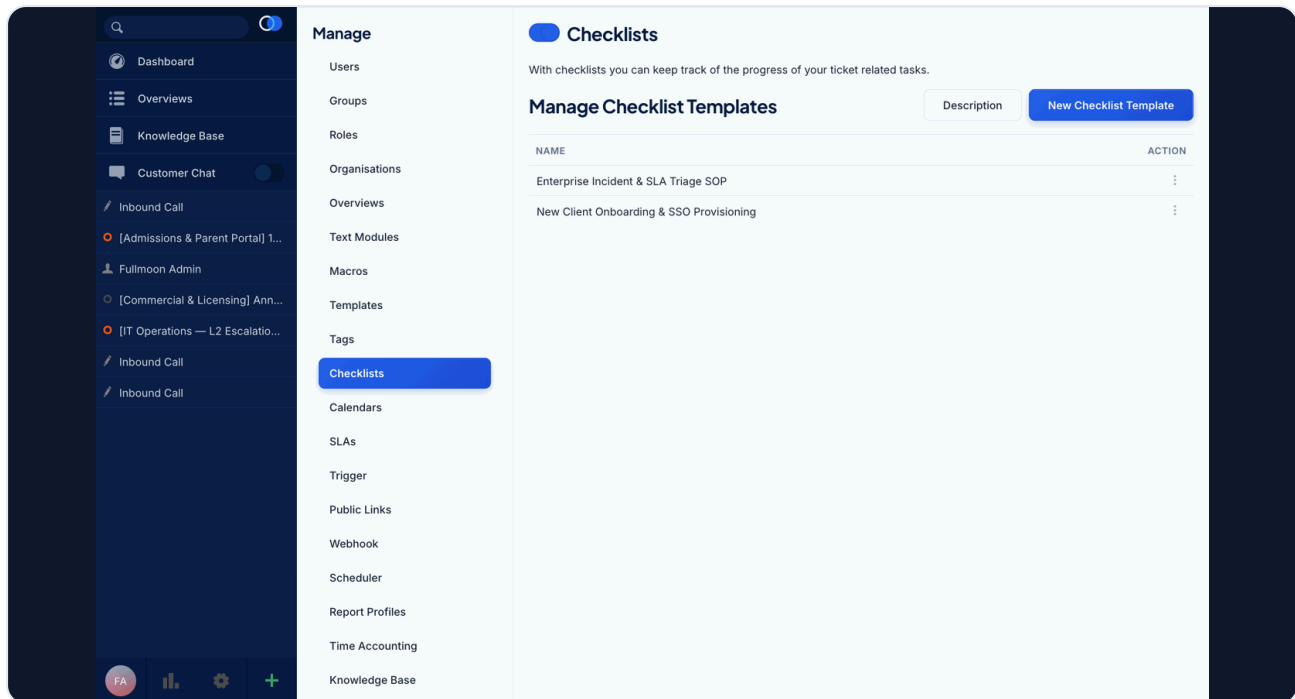
- 1. Tag Directory & Rename/Delete:** View all active tags across the system, rename misspelled tags globally, or remove obsolete tags.
- 2. Strict Taxonomy Lock (New tags allowed = Yes/No):** Toggle whether regular agents are permitted to invent ad-hoc tags on the fly or must select strictly from the administrator-approved list.

 **Best-Practice Tip:** Set 'New tags allowed = No' in production once your core reporting taxonomy is established so analytics and AI tagger rules stay 100% consistent.

## 3.10 — Checklists & SOP Sub-Tasks

### (Manage → Checklists)

Creates reusable Standard Operating Procedure (SOP) sub-task templates that agents attach to tickets to track multi-step workflows (e.g., Enterprise Incident & SLA Triage SOP, New Client Onboarding & SSO Provisioning).



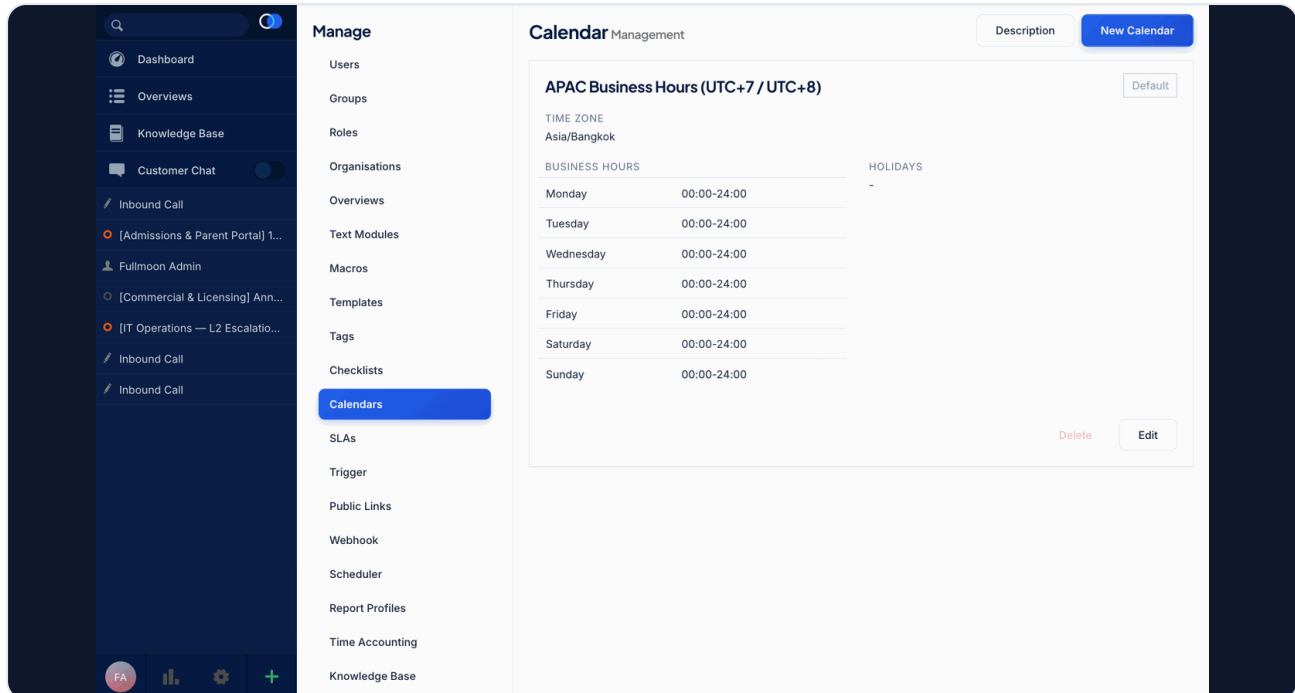
#### STEP-BY-STEP CONFIGURATION & USAGE

1. **Global Feature Toggle:** Enable or disable the Checklists sidebar tab across all tickets.
2. **Checklist Template Builder (New Checklist):** Define ordered sub-task items. Agents can tick off items as they complete them or link a checklist step directly to a child/related ticket.
3. **Close-Gate Enforcement:** LunaDesk automatically warns agents if they attempt to close a ticket while checklist items remain incomplete.

💡 **Best-Practice Tip:** Pair Checklists with Triggers or Core Workflows so high-priority incidents or new client onboarding tickets always follow a repeatable, auditable checklist.

## 3.11 — Business Calendars & Holiday Schedules (Manage → Calendars)

Defines regional timezones, operating business hours, weekend rules, and public holiday feeds used to calculate SLA countdown timers accurately.



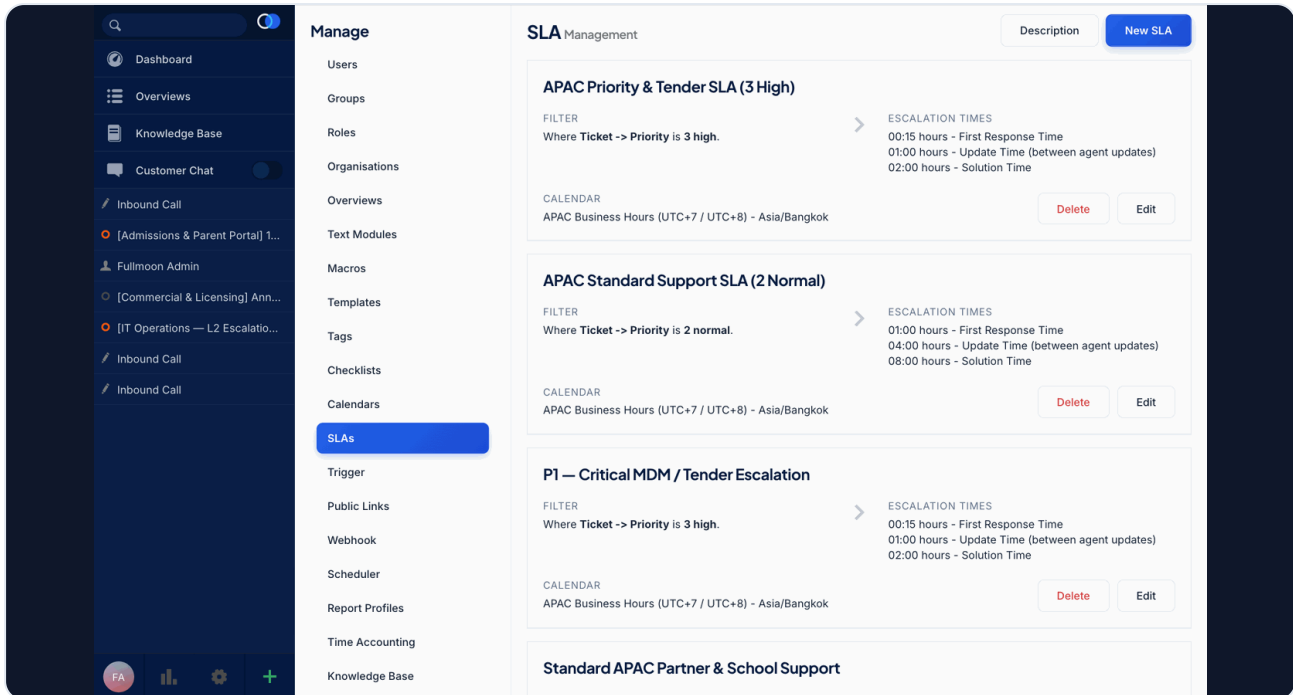
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Timezone & Daily Operating Windows:** Set the regional timezone (e.g., Asia/Bangkok UTC+7 or Asia/Singapore UTC+8) and configure active hours per day of the week (e.g., Mon–Fri 08:30–18:00 for standard support, or Mon–Sun 00:00–24:00 for 24/7 critical infrastructure).
- 2. Public Holiday Feed (iCal URL Import):** Subscribe to regional public holiday iCal feeds or add custom company holidays so SLA clocks automatically pause on non-working days.

**Best-Practice Tip:** Maintain at least two Calendars: a 'Regional Business Hours (Mon–Fri)' calendar for Standard/Growth SLAs and a '24/7/365 Continuous Operations' calendar for P1 Critical SLAs.

## 3.12 — Service Level Agreements (Manage → SLAs)

Enforces contractual response and resolution time guarantees with real-time visual countdown badges and automated warning/breach alerts.



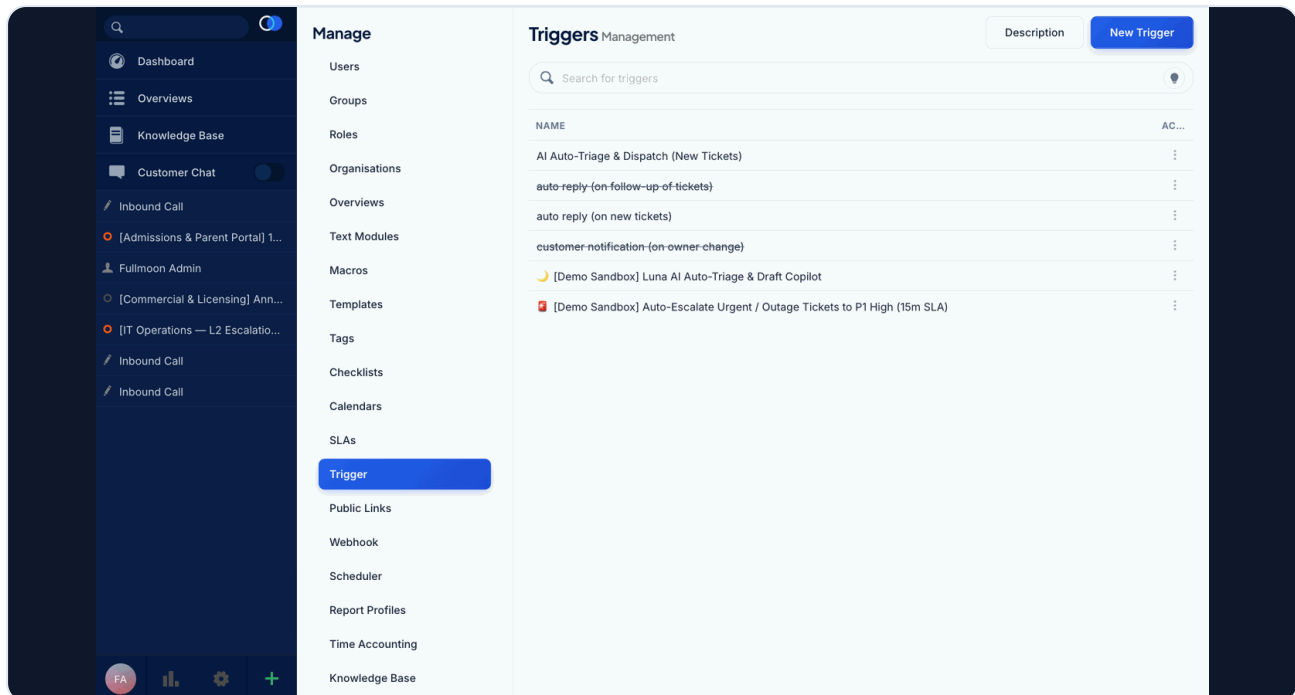
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Condition Matching (Filter):** Target specific Groups, Priorities, Organizations, or Tags (e.g., `Priority is 3 high` or `Group is Demo Sandbox`).
- 2. Three Independent Escalation Timers:**
  - **First Response Time:** Maximum elapsed business time before the first public agent reply (e.g., `00:15 hours` for P1).
  - **Update Time:** Maximum time allowed between subsequent agent updates (e.g., `01:00 hours`).
  - **Solution Time:** Maximum total business time until the ticket is moved to a closed state (e.g., `02:00 hours`).
- 3. Calendar Binding:** Bind each SLA policy to its corresponding Business Calendar so timers pause outside operating hours and during pending states.

**💡 Best-Practice Tip:** When a ticket reaches 75% of its SLA window, it enters the yellow 'SLA Warning' state; at 100%, it turns red ('Escalated') and can trigger an immediate Slack/Webhook alert.

## 3.13 — Event-Driven Triggers (Manage → Trigger)

The real-time automation engine (IF Event + Conditions → THEN Execute Actions). Evaluates immediately whenever a ticket is created, updated, or reaches an SLA warning/escalation threshold.



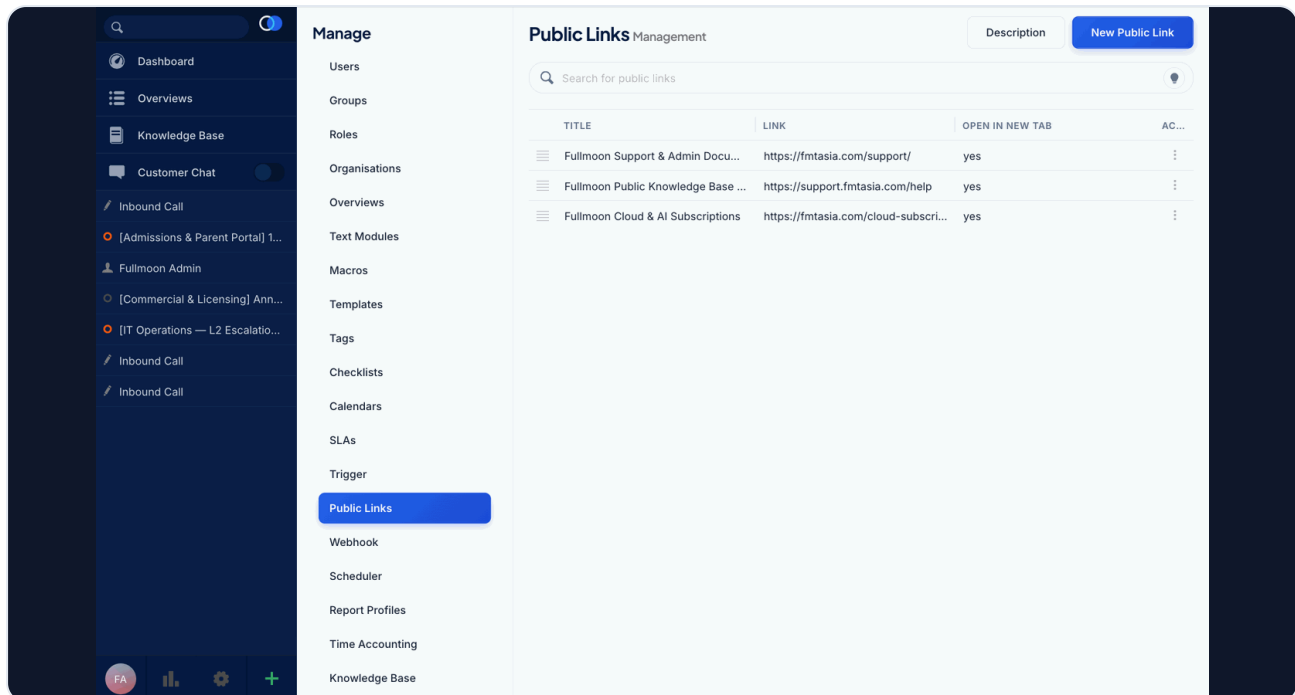
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Activator Event (Action / Time event):** Choose whether the Trigger fires on ticket changes (Action = Created / Updated) or on SLA thresholds (Escalation warning / Escalation).
- 2. Condition Logic (AND / OR):** Combine ticket, article, customer, and organization attributes (e.g., Ticket Action is Created AND Sender is Customer).
- 3. Automated Actions (Execute Changes):** Send personalized HTML email notifications, assign owners/groups/priorities, add tags, execute an **AI Agent**, or fire a signed **Webhook** (such as dispatching the ticket to Fullmoon's local Ollama AI Copilot).

**Best-Practice Tip:** Use recursive trigger execution carefully—add a condition like 'Tags contains not luna\_trigged' and an action 'Tags add luna\_trigged' so a webhook trigger only fires once per ticket.

## 3.14 — Public Links (Manage → Public Links)

Manages the external resource links displayed on the public #login, #signup, and #password\_reset screens.



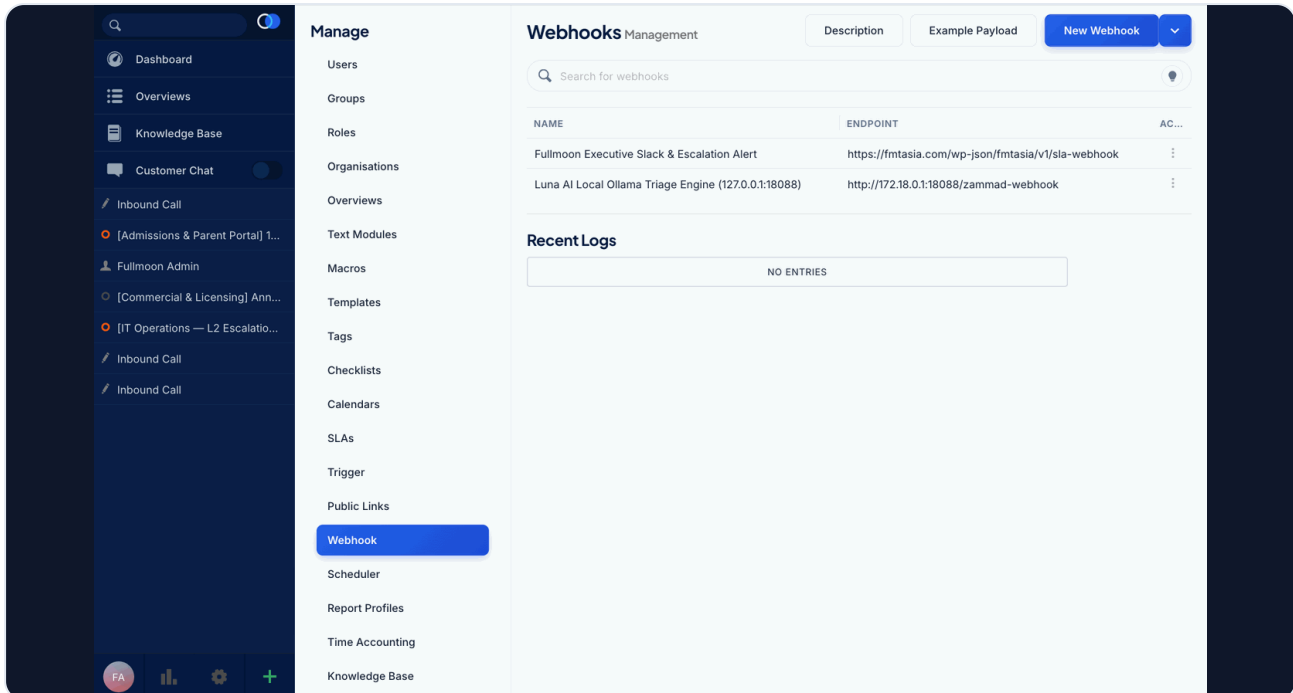
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Link URL, Title & Tooltip Description:** Point users to your Public Knowledge Base (<https://support.fmtasia.com/help>), Documentation Hub (<https://fmtasia.com/support/>), or System Status Page.
- 2. Screen Placement & New Tab Toggle:** Select which unauthenticated screens display each link and drag rows to reorder their priority.

**Best-Practice Tip:** Placing your Public Knowledge Base link on the login screen deflects password-reset and how-to questions before users even log in.

## 3.15 — Outbound Webhooks (Manage → Webhook)

Configures secure HTTP POST endpoints triggered by ticket events to integrate LunaDesk with local AI engines (Ollama), Slack/Teams channels, ERP/CRM systems, and n8n/Zapier pipelines.



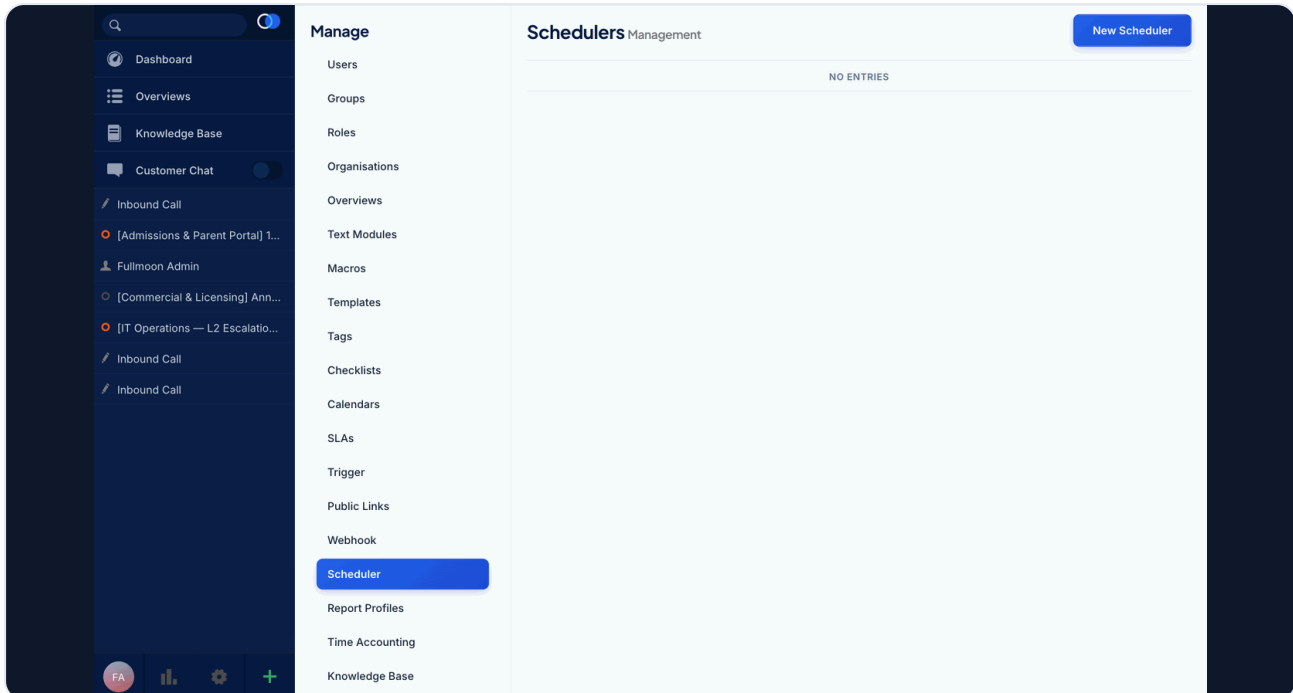
### STEP-BY-STEP CONFIGURATION & USAGE

- 1. Pre-Defined vs. Custom JSON Payloads:** Choose built-in payload templates (Slack, Microsoft Teams, Mattermost) or customize the exact JSON structure using LunaDesk variables.
- 2. Endpoint URL, HMAC-SHA256 Secret & SSL Verification:** Specify the target URL (e.g., `http://172.18.0.1:18088/LunaDesk-webhook` for the local Fullmoon Ollama triage service) and an optional cryptographic signing token (sent in the `X-Hub-Signature` header).

**💡 Best-Practice Tip:** Webhooks do not fire on their own—after creating a Webhook here, bind it to a Trigger under Manage → Trigger to control exactly which events dispatch it.

## 3.16 — Time-Based Scheduler (Manage → Scheduler)

Runs recurring cron-like batch operations across all matching tickets on a defined schedule (days of the week, hours, and 10-minute intervals).



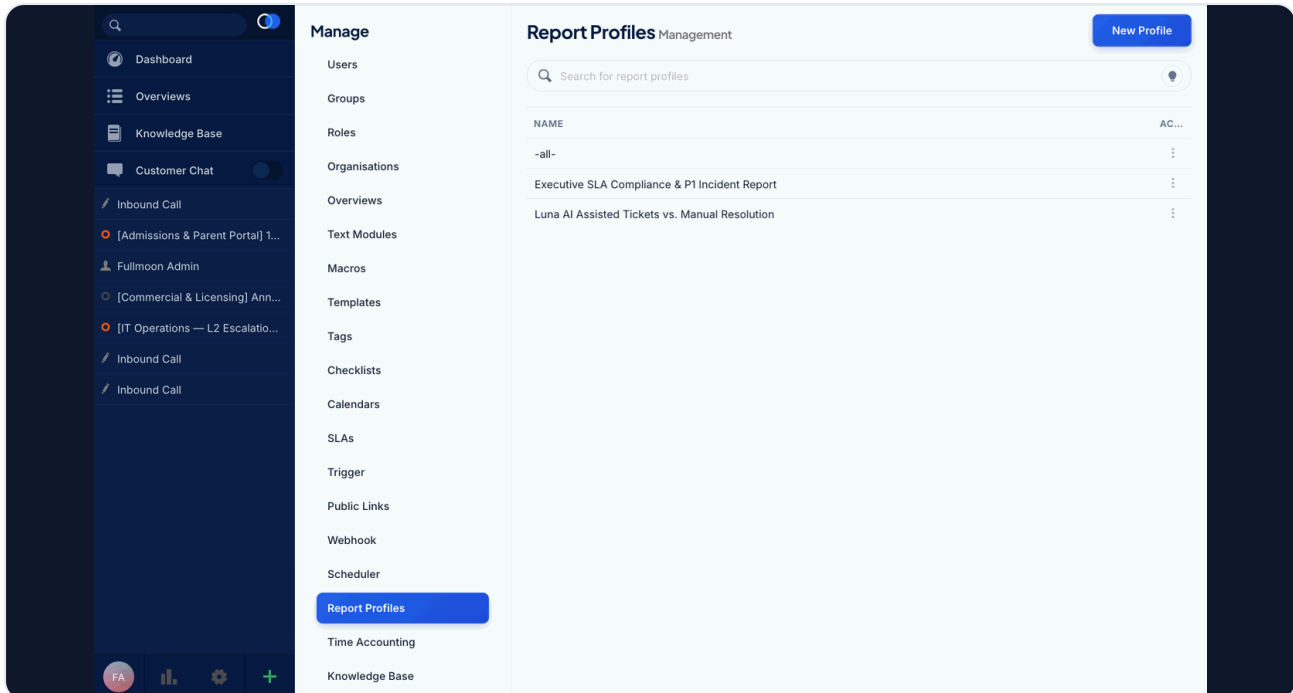
### STEP-BY-STEP CONFIGURATION & USAGE

1. **Ticket Selection Filter:** Match tickets by state, age, pending time, or last contact (e.g., State is pending close AND Updated at before (relative) 7 days).
2. **Schedule Matrix (Days / Hours / Minutes):** Check the exact days and times the batch job should execute.
3. **Batch Actions:** Automatically transition stale resolved tickets to closed, send follow-up reminders on unanswered customer questions, or purge temporary demo tickets.

💡 **Best-Practice Tip:** Schedule heavy batch cleanup jobs at 02:00 AM local time so agent Activity Streams stay clean during peak business hours.

## 3.17 — Analytics Report Profiles (Manage → Report Profiles)

Defines saved filter profiles powering the executive Reporting & Analytics interface (`#report`, accessible via the bar-chart icon at the bottom-left of the navigation bar).



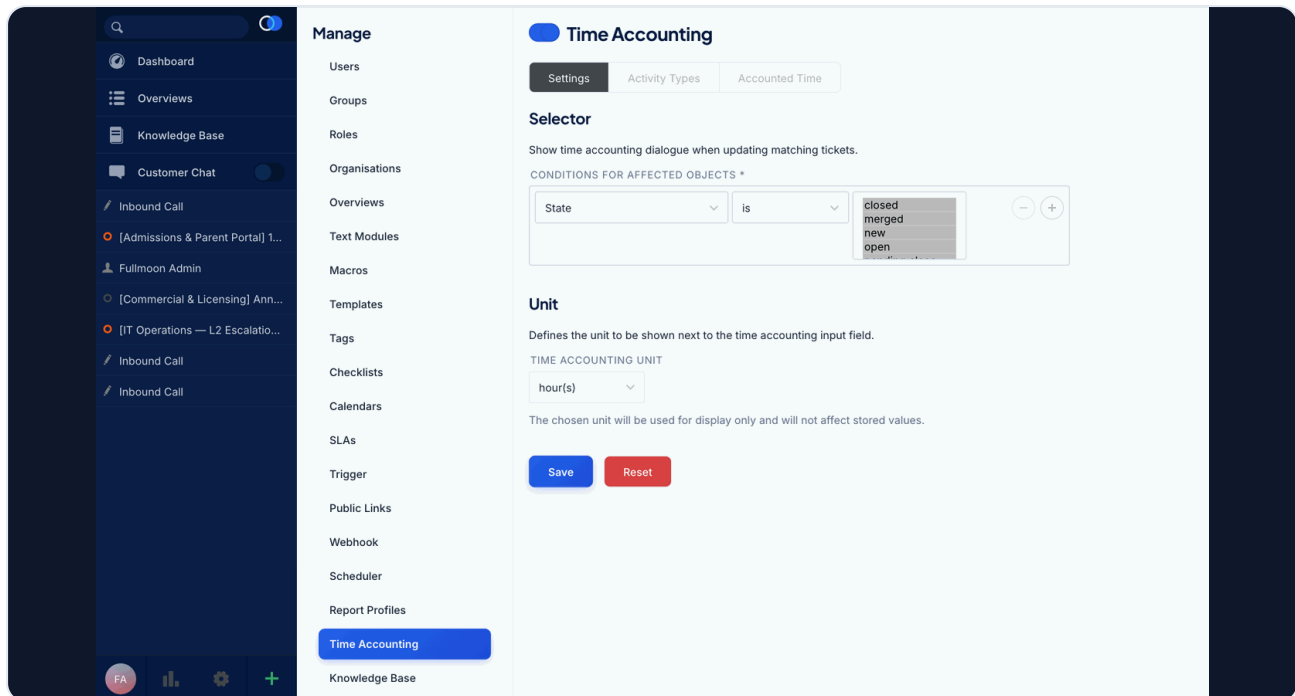
### STEP-BY-STEP CONFIGURATION & USAGE

- Custom Metric Slicing:** Create report profiles for specific SLA tiers, VIP Organizations, AI-triaged tickets, or P1 incidents.
- Time-Series & Excel/CSV Export:** Once saved, open the Reporting view (`#report`) to visualize ticket creation vs. closure curves, communication channel breakdowns, and download full CSV/XLSX datasets for monthly client SLA reviews.

**Best-Practice Tip:** Build a dedicated Report Profile for each Managed Service Desk client organization so you can export their monthly SLA compliance report in two clicks.

## 3.18 — Time Accounting & Service Credit Billing (Manage → Time Accounting)

Prompts support engineers to log time spent (minutes, hours, or service credits) and select an Activity Type whenever they update or resolve a ticket.



### STEP-BY-STEP CONFIGURATION & USAGE

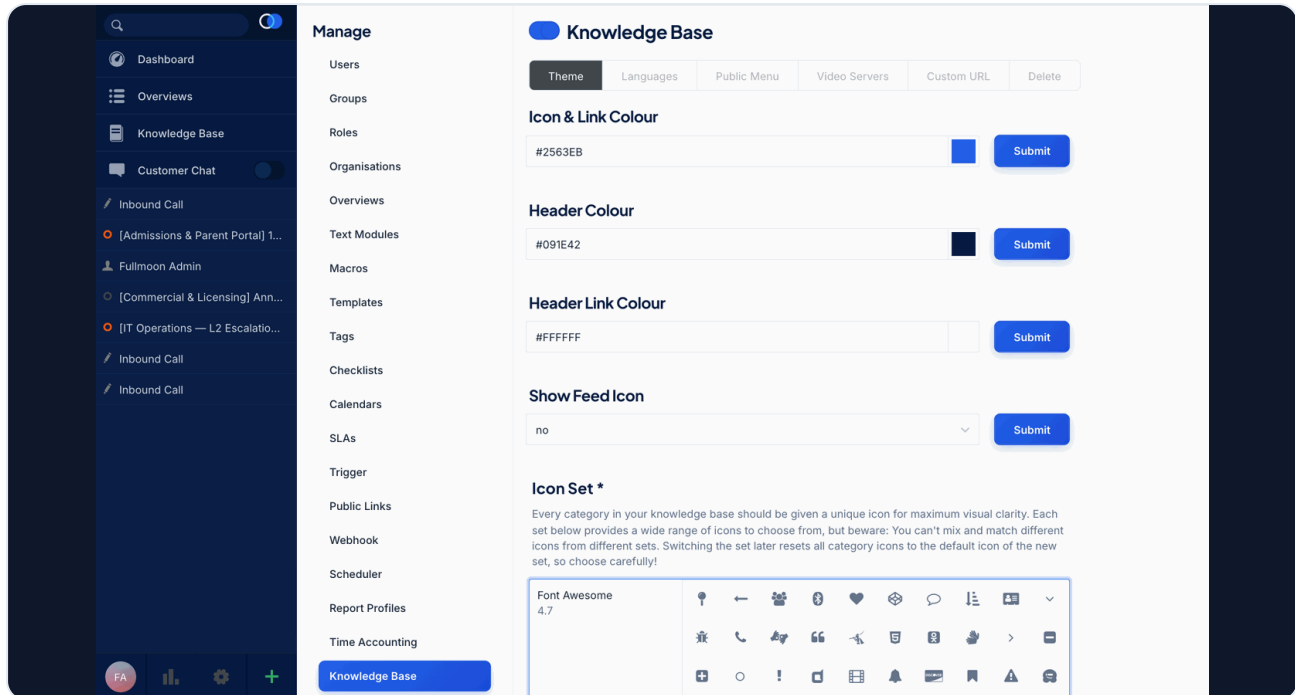
- 1. Condition Rules for Mandatory Time Logging:** Specify which Groups, Organizations, or Ticket States prompt agents for time entries.
- 2. Activity Types (L1/L2 Support Engineering, DevOps Tuning, AI Prompt Engineering):** Categorize billable vs. non-billable engineering work.
- 3. Monthly Worklog CSV Export:** Download complete per-organization and per-agent time logs by month for retainer drawdowns and invoice reconciliation.

**💡 Best-Practice Tip:** Essential for tracking bundled retainer hours on Managed Service Desk subscriptions and calculating per-client gross margins.

## 3.19 — Knowledge Base Global Settings

### (Manage → Knowledge Base)

Configures the global domain, supported languages, theme layout, and header navigation links of the public and internal Knowledge Base.



#### STEP-BY-STEP CONFIGURATION & USAGE

- Visual Theme & Icon Set:** Choose grid vs. list category layouts, accent colors, and icon libraries.
- Multilingual Locales (Languages):** Add languages (e.g., English, Thai, Bahasa Indonesia, Spanish) so each KB article can maintain localized translations side by side.
- Custom Public Address & Header Menu Items:** Configure the public path (<https://support.fmtasia.com/help>) and customize the top-right header buttons per language.

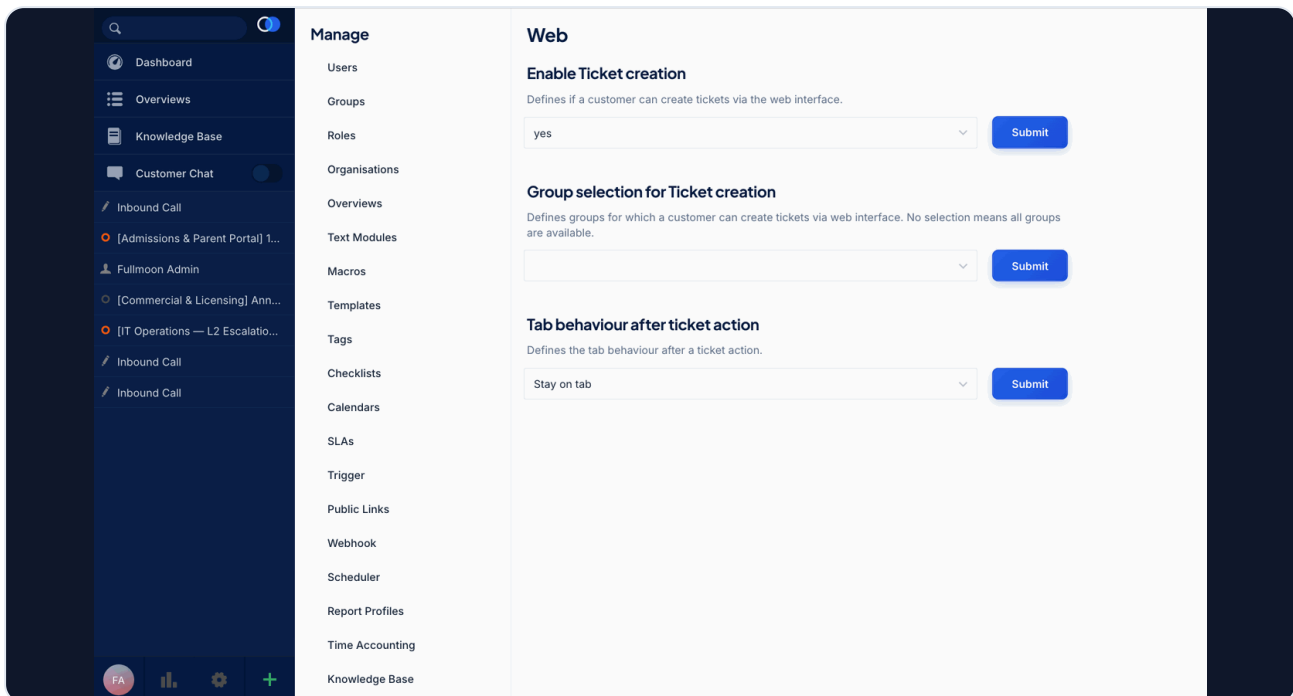
**Best-Practice Tip:** Whenever you add a new language to the Knowledge Base, use the AI Writing Assistant to translate your existing English articles in seconds.

# Administrator Reference — Channels

Omnichannel intake configuration covering Web Portal, Embeddable Form, Standard Email, SMS, Live Chat, Google Workspace OAuth, Microsoft 365 Graph OAuth, M365 IMAP, Facebook, Telegram Bot, and WhatsApp Business Cloud API.

## 4.1 — Web Portal Channel (Channels → Web)

Governs the customer-facing Web Portal experience (support.fmtasia.com)—specifically whether external customers can create tickets via the web UI and which Groups they are allowed to select.



### STEP-BY-STEP CONFIGURATION & USAGE

- Ticket Creation via Web (yes / no):** Enables the + (New Ticket) button inside the Customer Self-Service Portal.
- Customer Group Selection Whitelist:** Restrict which internal Groups appear in the customer's 'Group' dropdown (hiding internal-only queues like L3 DevOps or Executive Escalations).

**Best-Practice Tip:** Always exclude internal engineering and billing queues from 'Group selection for Ticket creation' so customers only submit into front-line triage queues.

## 4.2 — Embeddable Website Support Form (Channels → Form)

Generates a drop-in HTML/JavaScript support widget (inline page form or modal popup button) that can be embedded on any external website, WordPress page, or client intranet.

The screenshot displays the FMA Admin Panel interface. On the left is a dark sidebar with navigation links: Dashboard, Overviews, Knowledge Base, Customer Chat, Inbound Call, [Admissions & Parent Portal] 1..., Fullmoon Admin, [Commercial & Licensing] Ann..., [IT Operations — L2 Escalatio..., Inbound Call, and Inbound Call. The main content area is titled 'Form' and includes a description: 'With form you can add a form to your web page which directly generates a ticket for you.' Below this are three sections: 'Settings' with a 'GROUP SELECTION FOR TICKET CREATION' dropdown set to 'APAC Support & Operations'; 'Spam protection' with a checked 'Enable honeypot protection' checkbox and a 'CAPTCHA PROVIDER' dropdown; and 'Designer' with fields for 'TITLE OF THE FORM' (set to 'Feedback Form') and 'NAME OF FORM SUBMIT BUTTON' (set to 'Submit'). It also includes a 'MESSAGE AFTER SENDING FORM' text area with the text 'Thank you for your inquiry (#%)! We'll contact you as soon as possible.' and an 'OPTIONS' table with checkboxes for 'Enable debugging for implementation.', 'Show title in form.', 'Start modal dialogue for form.' (checked), 'Don't load CSS for form.', and 'Add attachment option to upload.'

### STEP-BY-STEP CONFIGURATION & USAGE

- 1. In-Place vs. Modal Configuration:** Preview the live form right inside the admin panel and copy the 1-line