

Sitelok Help Scout Beacon Plugin



Help Scout Beacon Plugin

Copyright 2017-2021 Vibralogix. All rights reserved.

This document is provided by Vibralogix for informational purposes only to licensed users of the Sitelok product and is provided on an 'as is' basis without any warranties expressed or implied.

Information in this document is subject to change without notice and does not represent a commitment on the part of Vibralogix. The software described in this document is provided under a license agreement. The software may be used only in accordance with the terms of that license agreement. It is against the law to copy or use the software except as specifically allowed in the license.

It is the users responsibility to ensure the suitability of the product before using it. In no circumstances will Vibralogix be responsible for any loss or damage of data or programs as a result of using the product. Your use of the product implies acceptance of these terms.

Contents

Chapter 1 Introduction	4
What is the Help Scout Beacon plugin?	4
Chapter 2 Installation	6
Installing for the first time or upgrading	6
Disabling the Plugin.....	6
Uninstalling the plugin	6
Chapter 3 Setting up the plugin	7
Embed code	7
Signature key.....	9
Send extra fields to Help Scout	10
Adding the Beacon to your pages	12
Chapter 4 Support	13

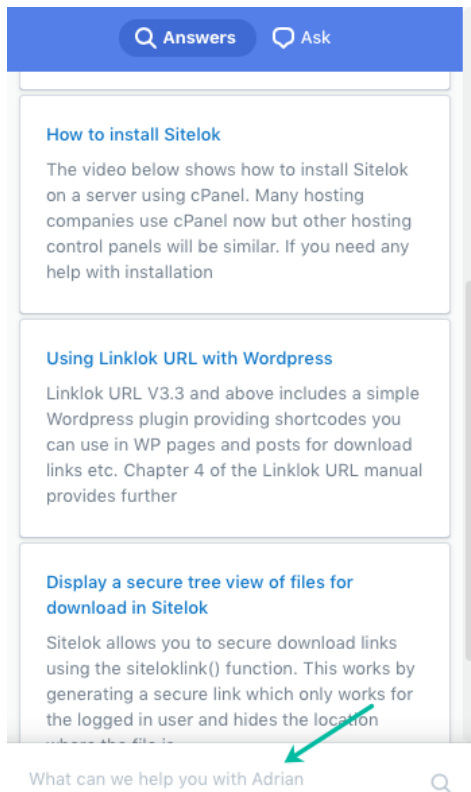
Chapter 1 Introduction

What is the Help Scout Beacon plugin?

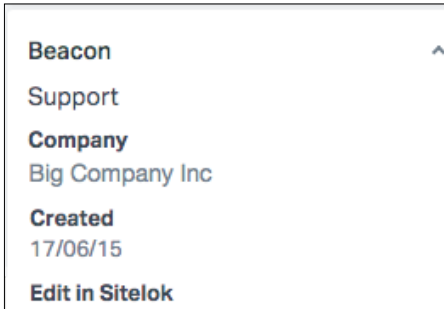
Help Scout is an easy to use but powerful support messaging system. For more information please visit their site <https://www.helpscout.com/>

Help Scout's Beacon is an embedded popup help and contact widget.

This plugin will identify logged in Sitelok users to the Beacon allowing them to send messages without entering their details and to also access previous messages. You can also personalize text using the members name or other details.



You can include data from other Sitelok fields with the message which will appear in Help Scout's customer properties section so that the information is instantly available when you receive the message. You can also include a link back to the users edit page in the Sitelok control panel.



For more flexibility you can define two Beacons one of which is used when users are not logged in (visitors) and one for logged in members.

Chapter 2 Installation

Installing for the first time or upgrading

- 1) Extract the contents of the zip file to your PC.
- 2) Upload the plugin_hsbeacon folder to your existing Sitelok slpw folder using FTP. There are no special permissions required on most servers.
- 3) Login to the Sitelok control panel.
- 4) Open the following URL in the browser

http://www.yoursite.com/slpw/plugin_hsbeacon/install.php

which will start the installation process. If all is well you will be taken to the plugin preferences page where you will see the plugin listed.

If you have any problems with installation please let us know so that we can help you.

If you are upgrading from V1.0 you will need to create a new Beacon 2 in your Help Scout account.

Disabling the Plugin

To disable the Help Scout Beacon plugin select **Plugin Preferences** in the **Plugin** menu option of Sitelok. Uncheck the enable box for the plugin and click the **Save** button. You can enable it again in the same way.

Uninstalling the plugin

To permanently remove the plugin and its settings follow these steps.

- 1) Disable the plugin as above.
- 2) Click the delete icon next the plugin in the disabled plugins section.
- 3) Confirm the action in the alert box.

If the plugin is uninstalled successfully you will be returned to the plugin preferences page.

Chapter 3 Setting up the plugin

You can use an existing Beacon (V2) or create a new one in [Manage - Beacons](#). Once setup go to the [Installation](#) section to copy the HTML code required which will look something like this (You don't need to understand it though!)

Install Beacon for Web

HTML Code

Paste this code before the </body> tag

[Send Instructions](#)

```
<script type="text/javascript">!function(e,t,n){function a(){
getElementsByTagName("script")[0],n=t.createElement("script");n.type
="text/javascript",n.async=!0,n.src="https://beacon-v2.helpscout.ne
t",e.parentNode.insertBefore(n,e)}if(e.Beacon=n=function(t,n,a){e.Bea
con.readyQueue.push({method:t,options:n,data:a}),n.readyQueue=[],"co
mplete"===t.readyState)return a();e.attachEvent?e.attachEvent("onloa
d",a):e.addEventListener("load",a,!1)}(window,document,window.Beacon
|function({}){});</script>
<script type="text/javascript">window.Beacon('init', 'e9dc8fe0-ab19-4
9c4-ε [redacted] ')</script>
```

If you want to add your own custom API code to the Beacon (see <https://developer.helpscout.com/beacon-2/web/javascript-api/>) then you can include that too after the standard code.

Login to Sitelok and go to [Plugins - Help Scout Beacon](#)

Embed code

Paste the code into the [Embed code for visitors](#) box in the plugin settings. For a default installation you can also paste the same code into the [Embed code for logged in members](#) box as well.

Within any custom API code you add you can use the following variables to insert user specific data

Chapter 3 - Setting up the plugin

```
!!!username!!!  
!!!userid!!!  
!!!name!!!  
!!!firstname!!!  
!!!lastname!!!  
!!!email!!!  
!!!custom1!!! to !!!custom50!!!
```

These variables should only be used for the **Embed code for logged in members**. They will be left blank in the **Embed code for visitors**.

Variables can be used to personalise the text used in the beacon which is done using their API. For example if you paste this example to the end of the embed code for logged in members

```
<script>  
Beacon('config', {  
  "labels": {  
    "searchLabel": "What can we help you with !!!firstname!!!",  
  }  
})  
</script>
```

it will personalize the message to show for example

What can we help you with John

For more information about the API see

<https://developer.helpscout.com/beacon-2/web/javascript-api/>

Paste the key into the **Signature key** field in the plugin settings.

Send extra fields to Help Scout

When a logged in member sends a message their identity will be passed to the Beacon from Sitelok so that they don't need to enter their name or email. You can also have other Sitelok fields sent with the message which get displayed in the customer properties section in Help Scout. This could for example show you which usergroups they belong to.

To do this enable up to 10 fields you want and drag and drop the order in the Extra fields box. Name and email are automatically included.

Extra fields

Select any extra fields to send to Help Scout and drag and drop the order. The users name and email are automatically sent.



There is also an option to send an edit user link to Help Scout as well. This link can be used to open the users edit page in the Sitelok control panel. You will need to login to Sitelok before access if you are not already of course.

Note that it is possible for the user to see any of the included fields if they view the source of the web page so be careful not to include fields containing internal data you don't want them to see!

Click **Save** to store the settings.

You need to create these extra fields as properties in Help Scout too. To do this

- 1) In your Help Scout account got to Manage - Properties.

Chapter 3 - Setting up the plugin

- 2) For each extra field you have (name and email are automatic anyway) click **Add Property**.
- 3) Enter the **Name** for the property. This can be anything you want as a label.
- 4) Enter the **Property ID**. This must be one of the following

username
user-id
usergroups
created
custom1 to custom50
edit-in-sitelok

- 5) Click **Create**.
- 6) Repeat 2) to 5) for each extra field.

Create New Property

Name

Property ID

This is used to update properties via the API and Beacon. [Learn more](#)

Type

Cancel **Create**

Adding the Beacon to your pages

Once you have setup the plugin you can add the Beacon to your pages by pasting in this snippet just before the </body> tag.

```
<?php if (function_exists('sl_helpscoutbeacon')) sl_helpscoutbeacon(); ?>
```

Many web design apps like Rapidweaver and Blocs provide settings to add code to all pages easily.

Chapter 4 Support

Hopefully if you have followed this manual carefully everything will be working fine. However sometimes things don't go quite so smoothly so if you have any questions or problems then please check the FAQ on the support page or email us.

Support area: <http://www.vibralogix.com/support/>

Email: support@vibralogix.com