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Mattermost Export

Instantly share WHMCS reports, tickets, and invoices in your Mattermost server.

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Description

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The "**Mattermost Export**" extension establishes a unidirectional link from your WHMCS server to your Mattermost workspace, facilitating seamless communication and timely notifications for events. This extension is designed to efficiently transmit updates regarding new tickets, payments, client responses to tickets, and reports deliveries directly to your Mattermost messenger.

Key Features:

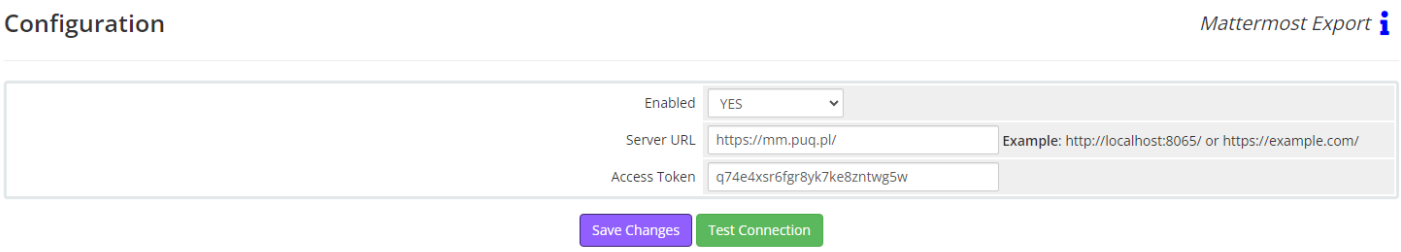
- Ticket Notifications: Receive instant notifications in your designated Mattermost channels whenever a new ticket is created in your WHMCS system. Stay informed of client inquiries and support requests without the need to continuously monitor your WHMCS dashboard.
- Payment Alerts: Stay up-to-date on payment activities by receiving notifications in Mattermost whenever a new invoice is paid by a client. This feature ensures that you are promptly notified of successful transactions, enabling you to maintain accurate financial records and provide timely service delivery.
- Client Interaction Updates: Receive notifications in Mattermost when clients respond to tickets, allowing you to engage with client inquiries and provide timely assistance. This feature enhances communication efficiency by ensuring that your team is promptly alerted to client interactions within your WHMCS platform.
- Report Delivery: Streamline the distribution of reports by automatically sending them to designated Mattermost channels or users. Keep your team informed of important metrics, financial summaries, or other relevant data without the need for manual distribution.
- Customizable Notification Settings: Tailor the notification preferences to suit your team's needs with customizable settings. Specify the types of notifications to be sent to Mattermost, adjust notification channels, and fine-tune the integration to align seamlessly with your workflow.

Overall, the "**Mattermost Export**" extension enhances collaboration and efficiency by delivering timely notifications for key events within your WHMCS system directly to your Mattermost messenger. By leveraging this integration, you can ensure that your team stays informed, responsive, and coordinated, ultimately enhancing customer service and operational effectiveness.

Configuration

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Enabled - Enabling or disabling all custom functions of this extension affects the automation and visibility of its features in the client area. When the extension is disabled, the automation capabilities and related features provided by the extension will not be active or visible to clients. However, as an administrator, you will still have access to configure and utilize the extension's functionalities through the administration interface. This gives you the flexibility to control the visibility and automation aspects of the extension based on your specific needs and preferences.

Server URL - The URL of your Mattermost server to which you want to send all data and notifications. Please be careful when filling out this field as it is one of the most important in this extension. When entering, it is very important to maintain the correct structure: before the domain or IP address, enter http:// or https://, depending on your server settings, and then add a trailing slash (/).

Access Token - This is the personal token of the administrator from whose account all notifications will be sent. You can obtain this token by following the instructions here:

https://docs.mattermost.com/developer/personal-access-tokens.html

> The user role from which notifications will be sent must be **System Admin**. Otherwise, most of the functionality may not work properly.

Test Connection - Button to test the connection to the server.

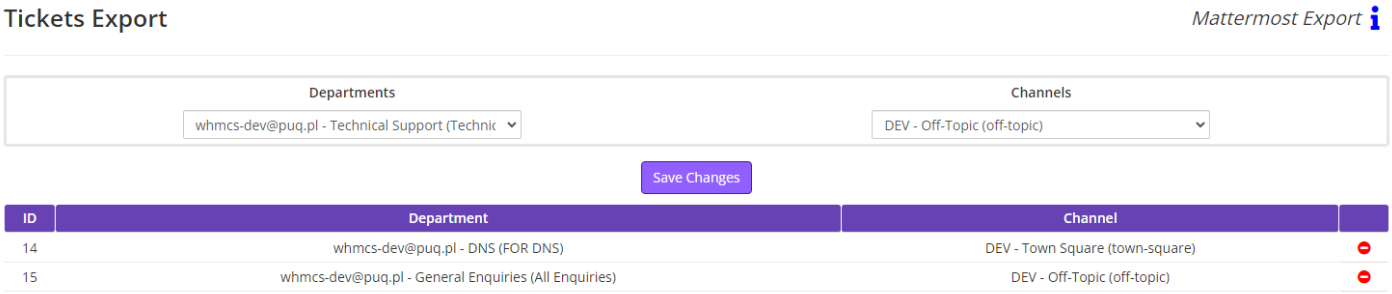
> Click this button after "**Save Changes**" to ensure that the test runs correctly.

Tickets Export

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Export Setup



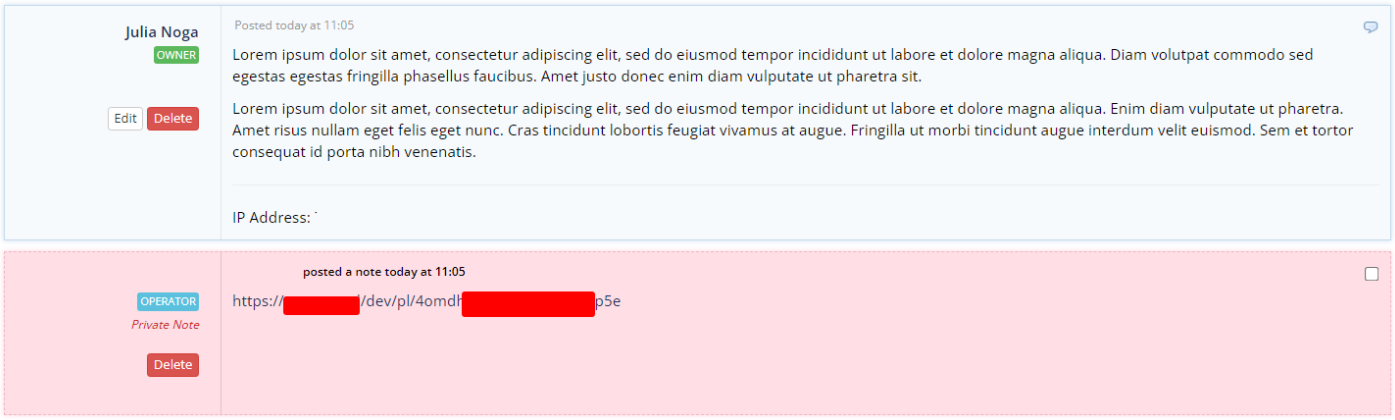
To configure notifications for new tickets, establish a connection between departments and channels. You can create this connection by selecting the department and the corresponding notification channel, then click the "Save Changes" button.

You can delete the necessary connection to change the channel for a particular department. To do this, click on the red icon " ⛔ "

Annotation containing a direct link to discuss

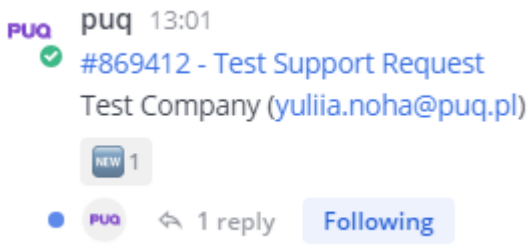
When creating a new ticket, an annotation will appear within the same ticket from the administrator's side, containing a direct link to discuss this ticket on your Mattermost server.

> If you encounter an error upon accessing the link, it indicates that you do not have access to this channel.

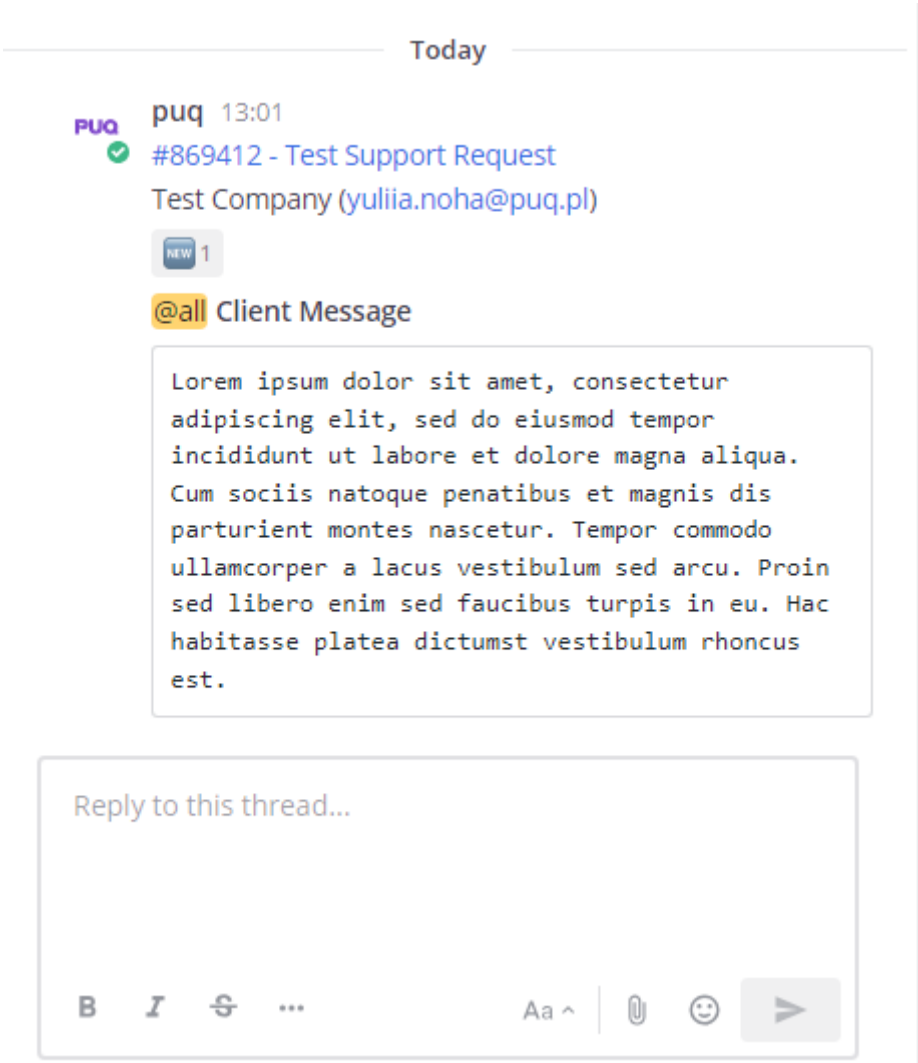


What new ticket notifications look like

The main view of the ticket has a special structure and represents a link directly to the ticket in your WHMCS: #(Ticket Number) - (Ticket Title). There is also a reaction  indicating that the ticket is new and has no new replies from the client.



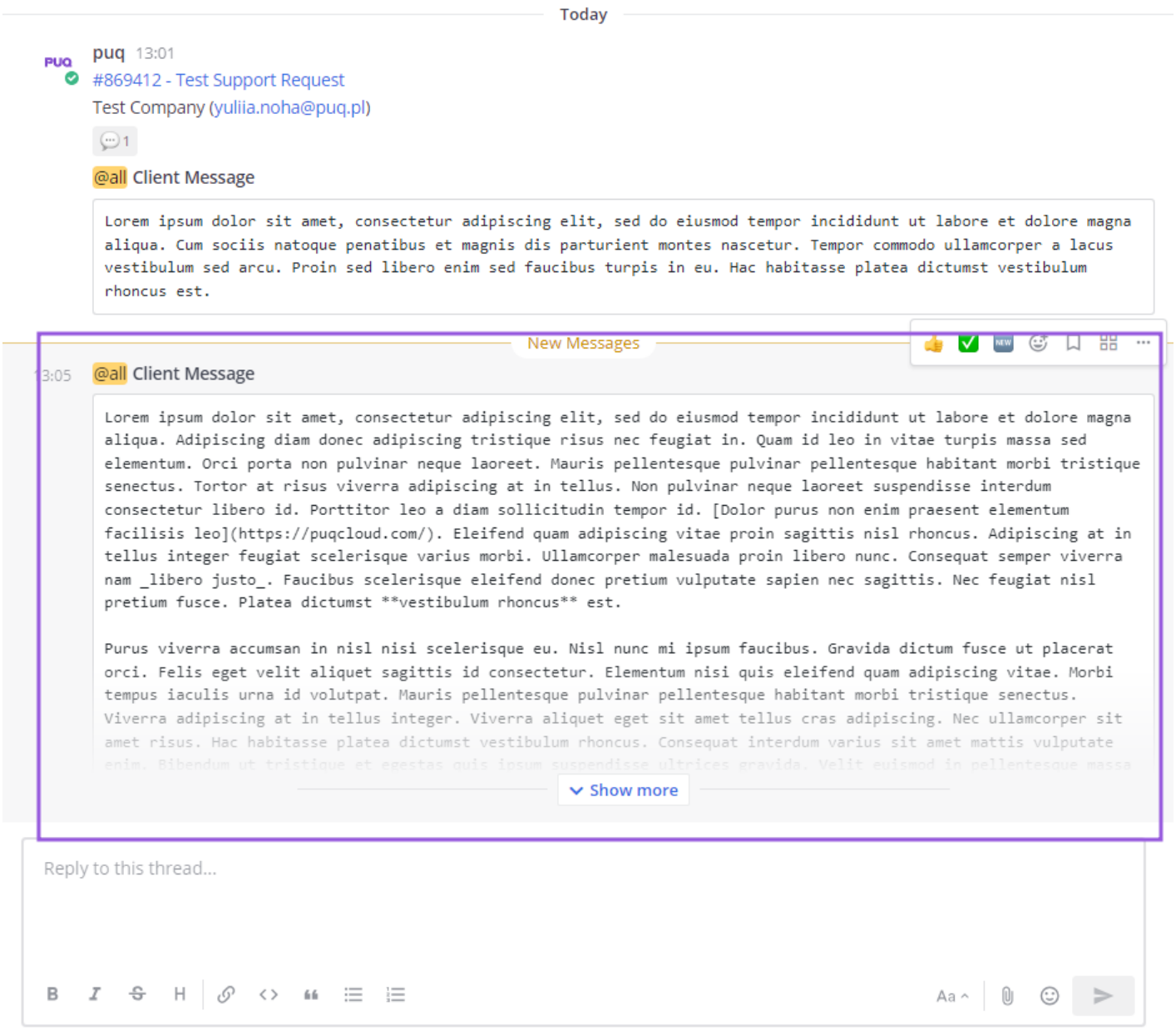
In the Thread, the message about the new ticket will have the text of the client's email. This will help you immediately see the content of the ticket.



What ticket reply notifications look like

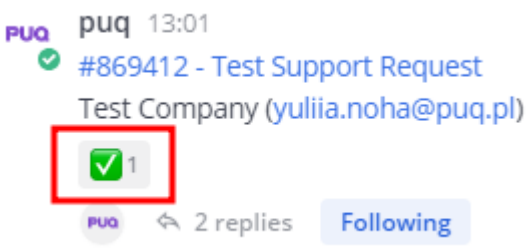
When receiving a notification that the client has replied to the ticket, the Thread will display the text of the client's email. The reaction will also change to 1 indicate that the ticket has a client reply.

> Please note that this only works with tickets created after installing and configuring this module. All tickets opened before this and their replies will not be displayed on your Mattermost server.



What closed ticket notifications look like

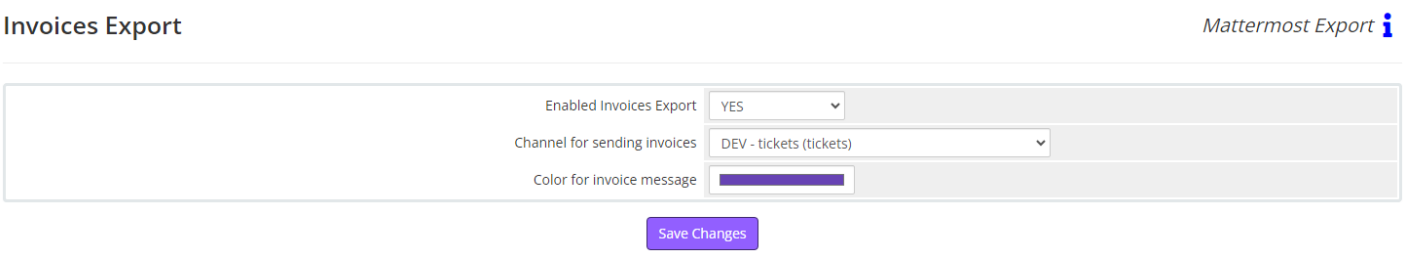
When a ticket is closed, the reaction will change to ✅1 indicate that the ticket has a closed status.



Invoices Export

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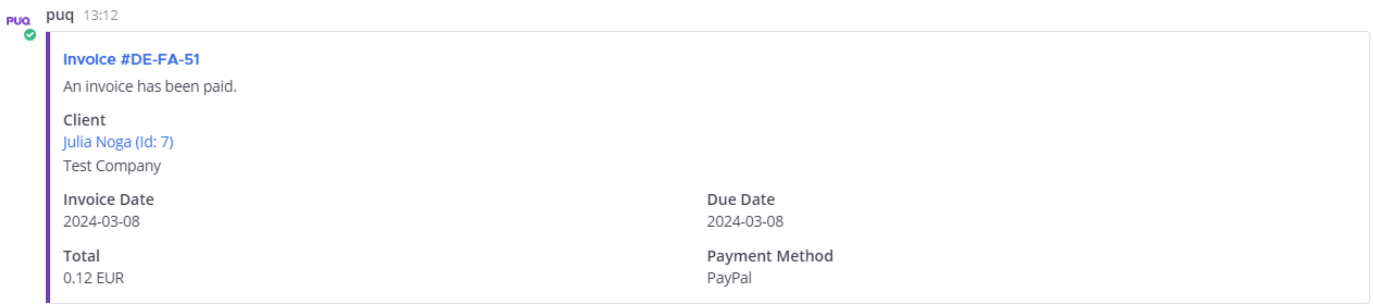
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Enabled Reports Export - You can easily activate or deactivate sending notifications about paid invoices.

Channel for sending invoices - Select the channel on your server where notifications about paid invoices will be sent.

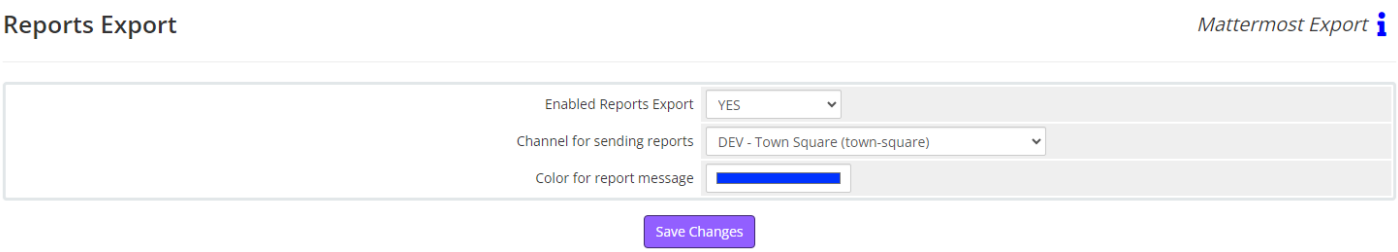
Color for invoice message - Choose the color of the sidebar on notifications about paid invoices.



Reports Export

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Enabled Reports Export- You can easily activate or deactivate sending reports from your WHMCS.

Channel for sending reports - Select the channel on your server where reports from your WHMCS will be sent.

Color for report message - Choose the color of the sidebar on report notifications.

Reports are sent when the daily cron job runs.
Daily Report - The report is generated every day for the previous day, i.e., the previous date (for example, if today is 02/13/2024, the report will be for the period 02/12/2024 00:00:00 - 02/12/2024 23:59:59).
Weekly Report - The report is generated every Monday for the previous week (for example, if today is 02/13/2024 (Monday), the report will be for the period 02/05/2024 00:00:00 (Monday) - 02/11/2024 23:59:59 (Sunday)).
Monthly Report - The report is generated on the first day of each month (for example, if today is 02/01/2024, the report will be for the period 01/01/2024 00:00:00 - 01/31/2024 23:59:59).

All data except for unpaid invoices is taken for a specific period (day, week, month). Information about unpaid invoices is aggregated. This means that the report includes the total number of unpaid invoices on your server at the time of report generation and sending.

puq 11:08

Daily Report

A Daily Report has been created.

Registered Clients
0

Created Invoices
2

Unpaid Invoices
88

Paid Invoices
5

Billing Income
0 zł; 16.47 EUR; 0 грн; $0;

New Orders
3

Active Orders
1

Created Tickets
2

Closed Tickets
1

Monthly Report

A report has been created.

Registered Clients
9

Created Invoices
290

Unpaid Invoices
81

Paid Invoices
166

Billing Income
98 zł; 68 EUR; 0 грн; $0;

New Orders
484

Active Orders
38

Created Tickets
12

Closed Tickets
4