



Bitergia

Celebrating 10 years of software  
development analytics!



# FreeScout

Cómo montar un departamento de soporte/atención al cliente con software libre

Pablo Hinojosa Nava

Bitergia Support Team

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## FreeScout

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  - Configuración básica
  - Módulos
  - Funcionalidades
- Pros y contras

## Preguntas



# ¿Quién es Pablo Hinojosa Nava?

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## Trabajador

- Linux Sysadmin
- Departamento de soporte de Bitergia
- Kanteron Systems, Gigas Hosting...

## Persona

- UGR
- Miembro activo de la comunidad
  - Colaborador en eventos y comunidades
  - WMES
  - Maldita Tecnología, Civio...



# ¡SPAAAM!

El CV de la cultura libre  
Sábado 25 13:15 - 13:30

MARCO (Salón de actos)

Pab1ohn26 / README.md



Hi there 🙋, my name is Pablo and I am Linux Systems Administrator

LINKEDIN

STACK OVERFLOW

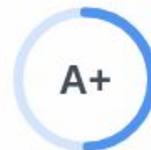
GIVES

2.54 EUR/WEEK

- Working at [Bitergia](#)
- I'm building [Hospital Assistant](#)
- Interested on automation
- I love tech events (actually it is a pretext to travel)
- Please, reproduce the error and show me the logs

## Pablo Hinojosa's GitHub Stats

Total Stars Earned:	6
Total Commits (2022):	51
Total PRs:	109
Total Issues:	108
Contributed to:	27



**¿Qué problema había  
que solucionar?**



# ¿Qué problema había que solucionar?

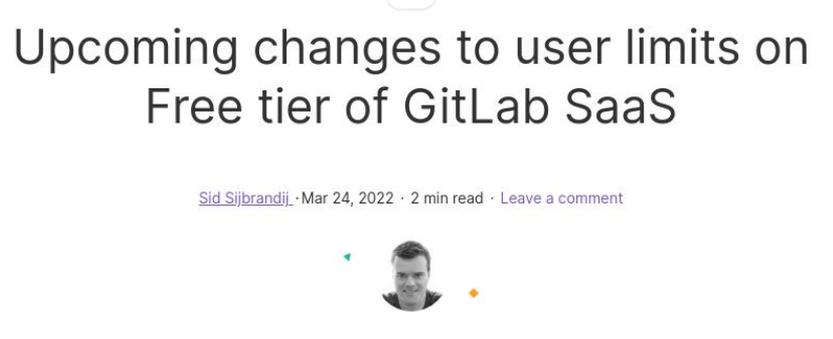
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## Profesionalizar soporte

Automatizaciones / gestión de procesos

Notificaciones

Mejora comunicación y retención de clientes



Upcoming changes to user limits on Free tier of GitLab SaaS

[Sid Sijbrandij](#) · Mar 24, 2022 · 2 min read · [Leave a comment](#)



## Nueva plataforma

Cambio en Gitlab Support Desk

Nuevas características (portal de tickets, formularios)

Protección de datos (ISO 27001)

# **Toma de requisitos, investigación y decisión**



# Toma de **requisitos**, investigación y decisión

---

## ¿Qué tenemos?

Repositorio web con gestión de incidencias

Visibilidad: abierto a internet (transparencia) o cerrado al cliente

Colaboración entre usuarios en un mismo ticket

Plataforma de soporte vía web y email

## ¿Qué necesitamos?

Integración con nuestro workflow actual

Gestión de permisos para permitir la colaboración entre usuarios en un mismo ticket



# Toma de **requisitos**, investigación y decisión

---

## Options to move GitLab customer support tickets

GitLab is going to change the conditions on the **22nd June 2022**, so the free version will only apply **5 users**. Our customer support tracker should be moved to another option and comply with these requirements:

1. Comply with our **ISO** regulations and GDPR.
2. A **place** to have a **documented** FAQ-User Handbook
3. **Open Source** if possible
4. Easy to **connect with our internal GitLab ticket** system
5. Multiple tracked interaction channels for our customers if possible (tickets created from **different channels**: slack, email, GitHub,...)
6. Automatic responses(when a ticket is opened/to close tickets automatically)
7. An alert to comply with our SLA
8. SaaS
9. App móvil
10. Request type
11. BAP web integration
12. chat integration (alerts)
13. CRM integration
14. Prizing
15. Easy user experience
16. Internal reports
17. Multiple followers



# Toma de requisitos, **investigación** y decisión

---

¿Qué alternativas  
tenemos?

Experiencias previas

Google

Github topics: [support](#), [helpdesk](#)

Cotilleo de otras empresas



# Toma de requisitos, **investigación** y decisión

---

Lado del bien



**FreeScout**

Help Desk & Shared Mailbox



Disclaimer: Vas apañao si crees que tengo el copyright de cada imagen. Cada imagen pertenece a cada una de las empresas

# Toma de requisitos, **investigación** y decisión

---

## Lado del mal



Disclaimer: Vas apañao si crees que tengo el copyright de cada imagen. Cada imagen pertenece a cada una de las empresas

# Toma de requisitos, **investigación** y decisión

feature	zendesk	freescout	zammad	GLPI	Helpy	Help Scout	FreshDesk
regulation	Yes	Yes +6 €	Yes (professional)	No	Yes	Policies	Yes
FAQ	Yes	Module(+14€)	Yes but not versionable and without metrics	Yes	Yes	Yes	Yes
FLOSS	No	Yes	Yes	Yes	Yes	No	No
Gitlab	Yes	Zapier	Yes with the email	with plugins	Zapier	Zapier	Yes
channels	Yes	Slack (+10,99€)	Yes	Yes	Zapier	Yes+Zapier	Yes
autoresponse	Yes	?	Yes	Yes	Yes	Yes	Yes
SLA	Yes(*Suite Growth Plan)	Workflows Module +17,99€	Yes	Yes	Yes	Yes	Yes
SaaS	Yes	Yes	Yes	Yes	Yes	Yes	Yes
App	Yes	Yes	No but responsive web	Yes	No	Yes	Yes
Type of request	Yes*	Module Tags +7,99 €	Yes	Yes	Yes	Yes	Yes
BAP web integration	Yes*	todo	Yes	todo	Yes	Yes	Yes
alerts	Yes	Yes	Yes	Yes	Yes	Yes	Yes
CRM integration	Zapier	Zapier	Yes but custom	todo	Yes	Zapier	own CRM
Prizing	€ 49-79/a/m	todo	15€/a/m	100€/m up to 10 a	from \$15/a/m	35 USD p/a/m	from \$15/a/m
easy UX	Yes	Yes	Yes	todo	todo	Yes	Yes
reports	Yes	Module (+17,99€)	Yes but paying(PLUS VERSION)	Yes	Yes	Yes	Yes
Multiple followers	Yes	Mentions Module +5€	----	Yes	Yes	Yes	Yes



# Toma de requisitos, **investigación** y decisión

---

## **Cosas a tener en cuenta**

Modelo de negocio

SaaS/self hosted

Aspectos legales

Integración CRM

## **Cosas a no tener en cuenta**

Aplicación móvil

Reportes

Multi canal

FAQ

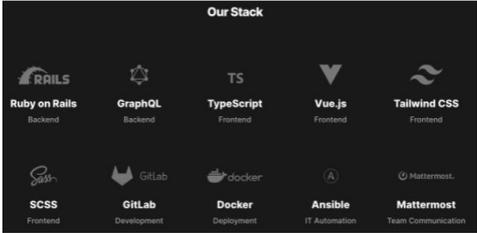


# Toma de requisitos, investigación y **decisión**

**Pablo Hinojosa** @Pablohn26 · 4 weeks ago

## Zammad proposal

Zammad is an open source help desk & shared mail box platform. It is built with Ruby on Rails and they have a Github community as we can see in [Cauldron.io](#)



**Our Stack**

- RAILS
- Ruby on Rails Backend
- GraphQL Backend
- TS
- TypeScript Frontend
- Vue.js Frontend
- Tailwind CSS Frontend
- SCSS Frontend
- GitLab Development
- Docker Deployment
- Ansible IT Automation
- Mattermost Team Communication

	Commits	Issues	Reviews
<b>Activity</b>	+81.70 %	-10.49 %	-48.94 %
<b>Community</b>	-13.89 %	-8.93 %	-48.48 %

Stats of "Zammad" year over year. [Open full report](#)

1. Comply with our ISO regulations and GDPR.

Zammad professional (SaaS) has ISO 27001 compliance

**Pablo Hinojosa** @Pablohn26 · 1 month ago

## Freshdesk proposal

FreshDesk is one of the most popular private support systems (more than 50.000 customers). It is used by a lot of companies and it is integrated into several [FreshWorks platforms](#) (CRM, Marketing...)

### Solution sum up

1. Comply with our ISO regulations and GDPR.

FreshDesk provides full GDPR and ISO 27001 compliance. FreeScout needs modules and a specific hosting provider.- 2. A place to have a **documented** FAQ-User Handbook

FreshDesk provides its **own KB platform**. It does not provide version control, so no metrics, but since we plan to provide our **homemade FAQ-User Handbook** this feature is not so important.- 3. **Open Source** if possible

FreshDesk is private.- 4. Easy to **connect with our internal GitLab** ticket system

FreshDesk provides a [Gitlab integration](#). The integration that we want is done using email (same as FreeScout). Comment sync is good but not needed.- 5. Multiple tracked interaction channels for our customers if possible (tickets created from **different channels**: slack, email, GitHub,...)

FreshDesk provides an **omnichannel** feature to be able to open a ticket from a lot of different sources. Basic channels (email and portal) are supported by both, FreshDesk and FreeScout.

**Pablo Hinojosa** @Pablohn26 · 1 month ago

## Freescout proposal

FreeScout is an open source help desk & shared mail box platform. It is built with PHP and they have a Github community that is constantly growing as we can see in [Cauldron.io](#)



	Commits	Issues	Reviews
<b>Activity</b>	+2.92 %	+19.22 %	-10.00 %
<b>Community</b>	+50.00 %	+45.58 %	+57.89 %

Stats of "Freescout" year over year. [Open full report](#)

It is simple and modular and with few modules, it is enough to have a good support platform. It has an API that is compatible with [HelpScout](#)- 1. Comply with our ISO regulations and GDPR.

Regarding GDPR, it has its own module. Regarding ISO 27001, we have found providers with ISO 27001 datacenters, but not the whole company has compliance. That is why we have to host the platform on a provider with full ISO 27001 compliance ([for example Digital Ocean](#))

ISO 27001 and GDPR compliance can be achieved with modules and specific hosting providers, but FreshDesk compliance is by default.- 2. A place to have a **documented** FAQ-User Handbook

# Toma de requisitos, investigación y **decisión**

## Pros

1. SaaS: no need to maintain by Bitergia.
2. Slack integration, creates a ticket from slack
3. Customer Segment: in Pro version we can set up customer segment to allow the people from the same organization to view the tickets of their buddies.
4. Better integration with their CRM: the integration with FreshSales is much better than FreeScout+Copper integration.

## Cons

1. Price: MUCH more expensive than FreeScout.
2. Limits to grow: features as you pay
3. Limits to fix the platform to our real needs: we do not need or the features are almost the same than FreeScout.

## Prizing

**By agent/month/ paid annually (15€ growth or 49€ pro version) +support email account +CRM (waiting for confirmation of price)**

[FreshDesk prizing](#) [FreshSales prizing](#)

## Pros

1. Price: we can have as many accounts as we want for the same price
2. Open Source: release each 2 weeks, good community health, popular.
3. We don't have any limit on agents, so the bill is always the same.
4. We can grow with no limits (we can deploy, or ask for it if we need a new feature)
5. For the difference in the price, we can be more people in the Copper CRM

## Cons

1. No SaaS
2. Some extra features need to be developed (customer segments)
3. No ISO 27001 SaaS provider

## Prizing

Already Paid 99,10€+2,5 USD webhosting

Monthly cost:

**+20 USD/m Webhosting**

**+Support email account**

**+1 Copper account(42 USD p/m/y)**

**Some extra modules(lifetime license):**

+Customization and rebranding (3 E)

+ GDPR (6 E)

+Reports?(18 E)

+Customer Data Enrichment (3E)

+Email commands(9 E)

+ Office hours (3E)

+Keyboard shortcut (6E)

# FreeScout



# FreeScout

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## Cómo montar un departamento de soporte/atención al cliente con software libre

- Características
- Recorrido en imágenes
  - Configuración básica
  - Módulos
  - Funcionalidades
- Comunidad
- Pros y contras



# Características

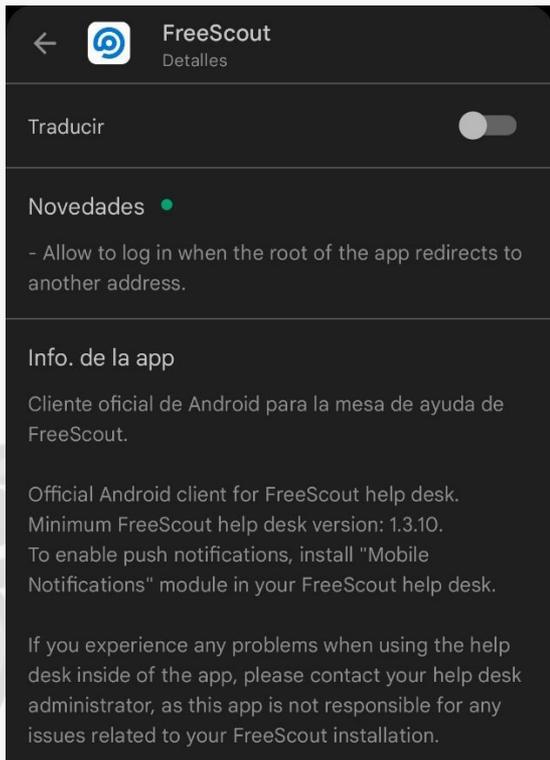
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## FreeScout

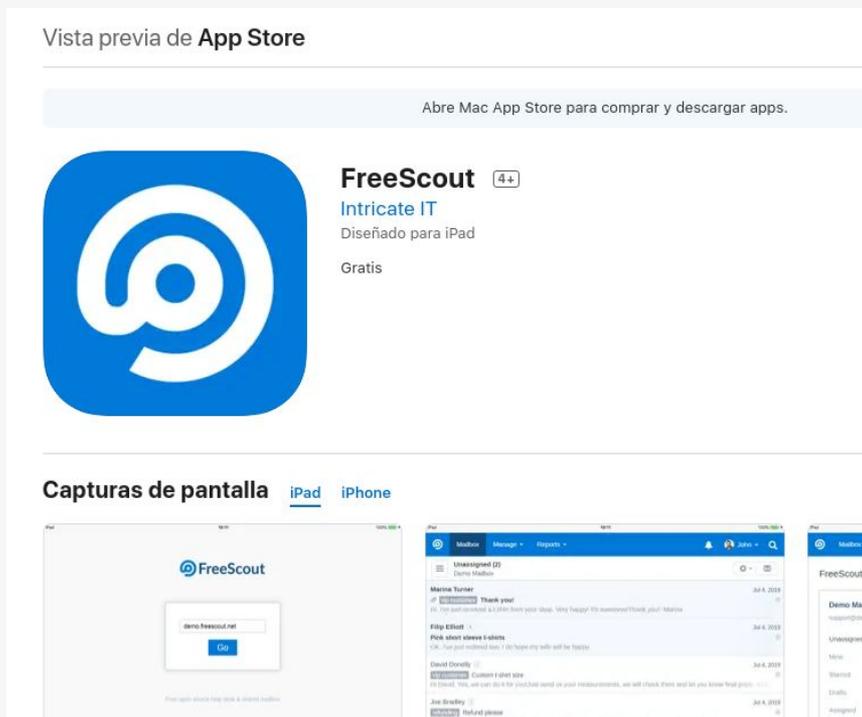
- Self hosted -> ¡sin límites!
- Hace lo necesario para un sistema de soporte al cliente
  - Integración con email
  - Mover, reenviar, marcar, mezclar conversaciones
  - Notificaciones push
  - Auto responder, respuestas predefinidas, SLA
  - Gestión de permisos
- Módulos
- Workflows ❤️
- Clon de HelpScout
- Comunidad activa
- Stack “de toda la vida” (Nginx, PHP, MySQL/MariaDB + Laravel)
- Demo en [demo.freescout.net](https://demo.freescout.net)

# Comunidad

## Aplicación móvil para Android y iOS



The screenshot shows the FreeScout mobile app interface. At the top, there is a back arrow, the FreeScout logo, and the text "FreeScout Detalles". Below this is a "Traducir" button with a toggle switch. The "Novedades" section has a green dot and a message: "- Allow to log in when the root of the app redirects to another address." The "Info. de la app" section contains the text: "Cliente oficial de Android para la mesa de ayuda de FreeScout." and "Official Android client for FreeScout help desk. Minimum FreeScout help desk version: 1.3.10. To enable push notifications, install 'Mobile Notifications' module in your FreeScout help desk." At the bottom, there is a note: "If you experience any problems when using the help desk inside of the app, please contact your help desk administrator, as this app is not responsible for any issues related to your FreeScout installation."



The screenshot shows the App Store page for the FreeScout app. The title is "Vista previa de App Store". Below the title is a banner that says "Abre Mac App Store para comprar y descargar apps." The app icon is a blue square with a white '@' symbol. The app name is "FreeScout" with a "4+" rating. The developer is "Intricate IT" and it is "Diseñado para iPad". The price is "Gratis". Below the app information are three screenshots of the app on different devices: iPad, iPhone, and another iPad. The iPad screenshot shows the FreeScout logo and a "demo.freescout.net" link. The iPhone screenshot shows a message thread with a "Thank you!" message. The second iPad screenshot shows a "Demo Mailbox" interface with a list of messages.

# Comunidad

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## Freescout

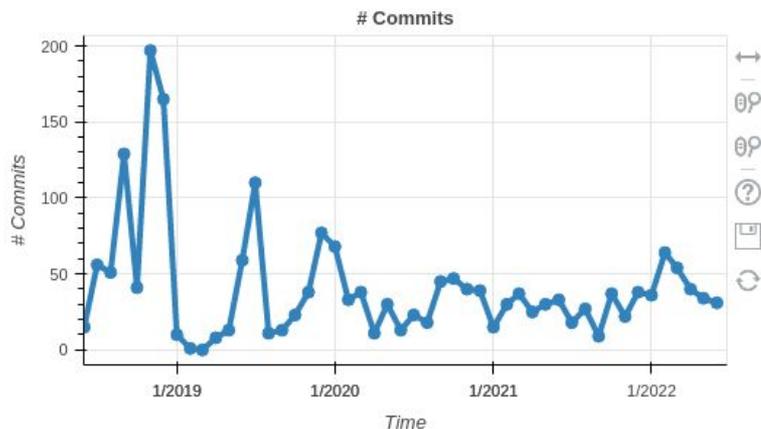


	Commits	Issues	Reviews
Activity	+2.92 %	+19.22 %	-10.00 %
Community	+50.00 %	+45.58 %	+57.89 %

Stats of "Freescout" year over year. [Open full report](#)

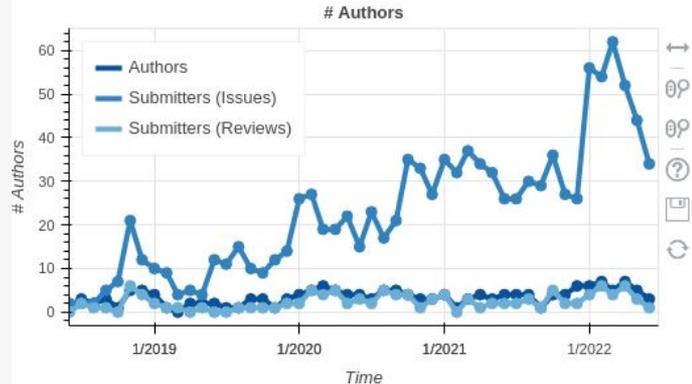
<https://cauldron.io/project/6092>

# Comunidad



## Number of commits

Number of commits is the most common measure of activity in a git repository. To compute it, we're considering all commits in all branches of all repositories in the report, excluding empty commits.



## Number of authors

Number of authors gives an idea of the size of the active community for a report. In this case, we're measuring, for each week in the chart, the number of different identities that authored at least one commit, or that submitted issues or reviews (pull or merge requests) to any repository of the report during that week. Although this is

[https://cauldron.io/project/6092?from\\_date=2018-06-01&to\\_date=2022-06-23&tab=performance-overview](https://cauldron.io/project/6092?from_date=2018-06-01&to_date=2022-06-23&tab=performance-overview)

# Comunidad

## Issues

Time open (average)



463.68 days

Time open (median)

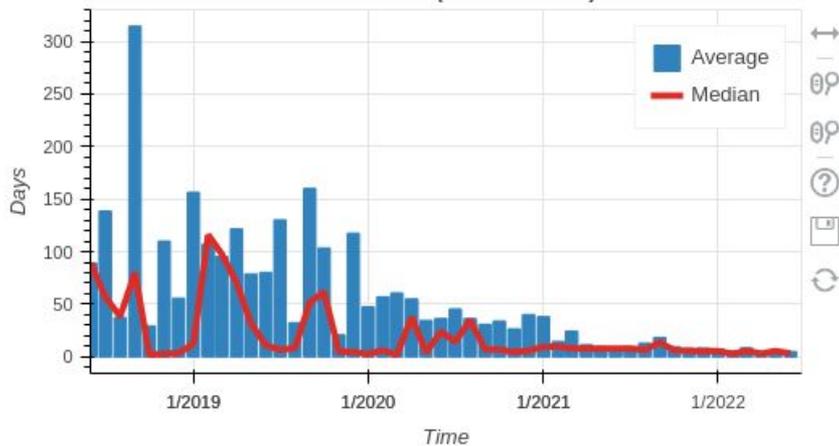


497.99 days

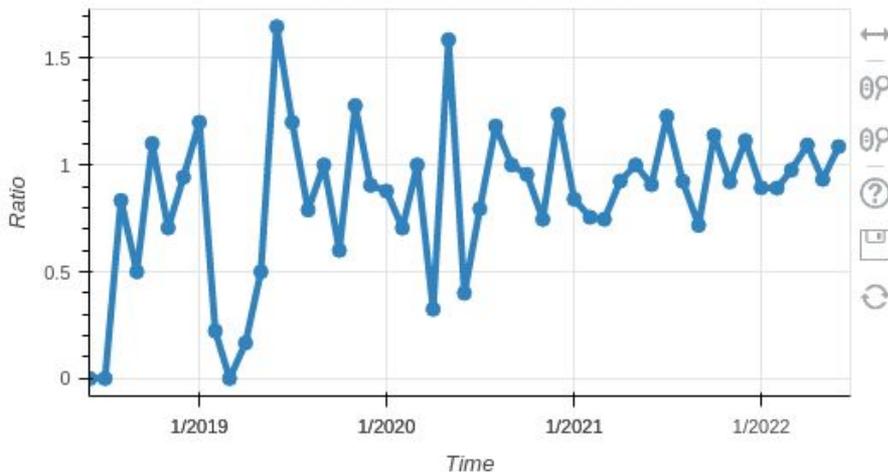
Open issues

149

## Time to close (Issues created)



## Issues closed / created ratio



[https://cauldron.io/project/6092?from\\_date=2018-06-01&to\\_date=2022-06-23&tab=performance-issues](https://cauldron.io/project/6092?from_date=2018-06-01&to_date=2022-06-23&tab=performance-issues)

# Comunidad

Filters ▾

✕ Clear current search query, filters, and sorts

🕒 138 Open ✓ 245 Closed Author ▾ Lat

- 🕒 Provide more details on failed jobs help wanted  
#2044 opened 9 days ago by MarcoWel
- 🕒 Move to Mailbox Without Access help wanted  
#2037 opened 15 days ago by sideshot
- 🕒 Show content from first email in auto reply help wanted  
#2006 opened on 19 May by maisen20
- 🕒 Freescout to freescout interference help wanted  
#2005 opened on 18 May by afawaz2
- 🕒 Write a message to logs if number of unread and fetched emails does not match help wanted  
#2001 opened on 16 May by MarcoWel

<https://github.com/freescout-helpdesk/freescout/labels/help%20wanted>

# Comunidad

 + Give feedback Most popular ideas ▾ 🔍 Search

 42

**Duplicate / split onversation**

Duplicate/split a communication to follow up on two independent topics covered in one customer email.

 2 

 39

**Improve Workflow conditons and actions**

The workflow module is awesome by itself but is missing more conditions and actions. Here is an example ## S...

 2 

 28**Users groups**

It would be nice to have users groups with group level permissions to mailboxes. It would simplify user manage...

 3  26**Plus addressing**

Plus addressing is this: mailbox+foo@domain.tld Allow assigning a thread to user foo. This way it works like an ...

 1  25**SMS notifications via nexmo.com**Send SMS notifications to users via <https://www.nexmo.com/> 1 

<https://feedback.userreport.com/25a3cb5f-e4bd-4470-b6f3-79fcfaa8e90f/#ideas/popular>

# Comunidad

## Servicio de migración

The screenshot displays the 'Help Desk Migration' website. The main heading reads 'FreeScout Data Migration with No Coding Skills from Your Side Required'. Below this is a search bar labeled 'Search your platform'. A grid of 12 supported platforms is shown, each with its logo and name: Assembla, Autotask PSA, Awesome Support, BOSSDesk, Cayzu, Cherwell Software, ConnectWise, CSV, Database, Deskpro, Dixa, and Dynamics 365. An arrow points from this grid to a box containing the FreeScout logo. The website's navigation menu includes 'How it works', 'Migration Services', 'Pricing', 'Supported Platforms', and 'Resources'. A phone number '+1-888-866-7471' is visible in the top right corner.

Help Desk Migration

How it works Migration Services Pricing Supported Platforms Resources

+1-888-866-7471

### FreeScout Data Migration with No Coding Skills from Your Side Required

Search your platform

Assembla	Autotask PSA	Awesome Support	BOSSDesk
Cayzu	Cherwell Software	ConnectWise	CSV
Database	Deskpro	Dixa	Dynamics 365

FreeScout

# Comunidad

## En 2 días se solucionó un bug

### Cannot reset user password #1911

 Closed Pablohn26 opened this issue on 12 Apr · 0 comments



Pablohn26 commented on 12 Apr

Contributor  

When we try to reset the password of an user we are getting the following error:

Whoops, looks like something went wrong — check logs in /storage/logs

Viewing the logs, we see the following:

```
strtolower(): Passing null to parameter #1 ($string) of type string is deprecated {"exception":"[object] (ErrorException(code: 0): strtolower(): Passing null to parameter #1 ($string) of type string is deprecated at /home/supportb/domains/support.bitergia.com/public_html/vendor/symfony/css-selector/XPath/Extension/NodeExtension.php:199)
```

Reset Password from user profile does not work too:

```
strtolower(): Passing null to parameter #1 ($string) of type string is deprecated {"userId":2,"email":"adminemail@company.com","exception":"[object] (ErrorException(code: 0): strtolower(): Passing null to parameter #1 ($string) of type string is deprecated at /home/supportb/domains/support.bitergia.com/public_html/vendor/symfony/css-selector/XPath/Extension/NodeExtension.php:199)
```

App Version	1.8.11 <a href="#">Check for updates</a>
Date & Time	Apr 12, 2022 13:49
Timezone	Europe/Berlin (GMT+0200)
Protocol	HTTPS
Web Server	LiteSpeed
PHP Version	PHP 8.1.4
PHP upload_max_filesize / post_max_size	64M / 64M

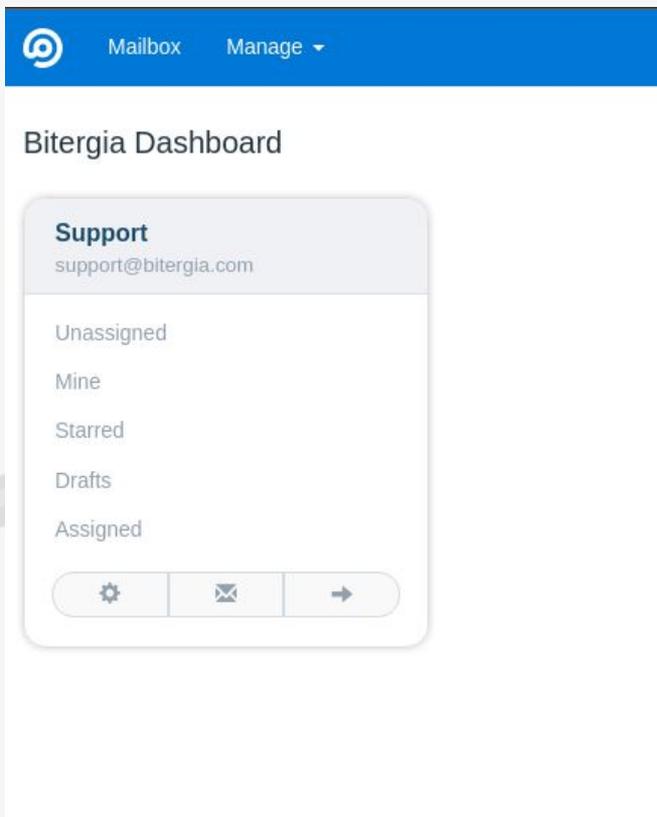


Pablohn26 changed the title ~~Cannot reset user password~~ Cannot reset user password on 12 Apr

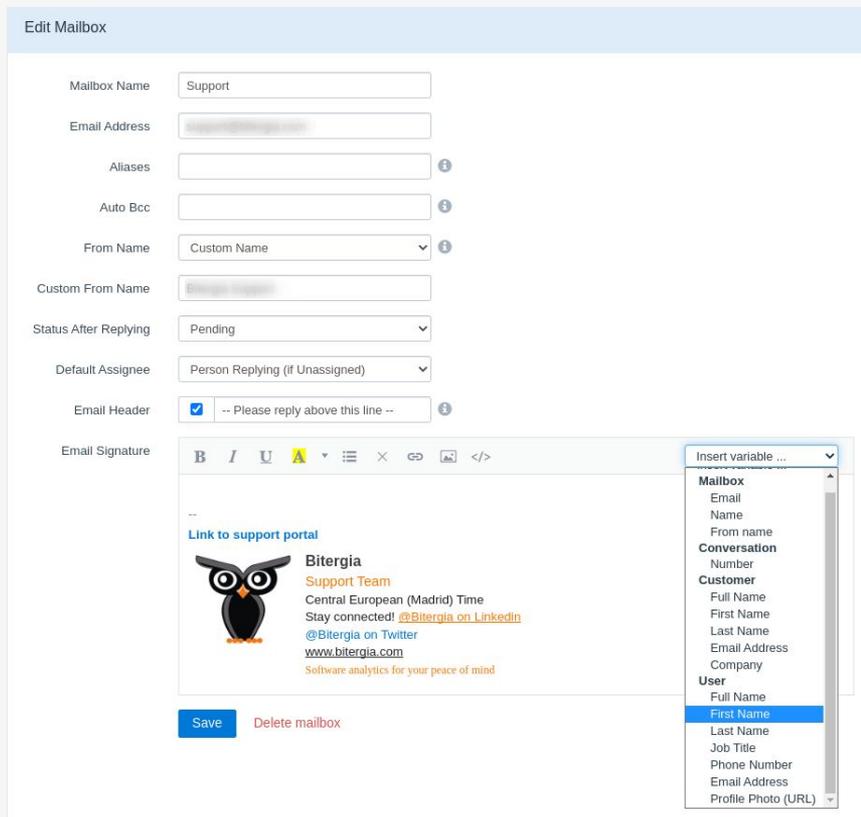


freescout-helpdesk closed this as completed in 1d859d3 on 14 Apr

# Recorrido en imágenes - bandeja



The screenshot shows the Bitergia Mailbox Dashboard. At the top, there is a blue header with the Bitergia logo and the text "Mailbox Manage". Below the header, the main content area is titled "Bitergia Dashboard". A prominent card displays "Support" with the email address "support@bitergia.com". Below this card, there is a list of mailbox categories: "Unassigned", "Mine", "Starred", "Drafts", and "Assigned". At the bottom of the dashboard, there are three icons: a gear for settings, an envelope for mail, and a right-pointing arrow for navigation.



The screenshot shows the "Edit Mailbox" configuration page. The page has a light blue header with the title "Edit Mailbox". Below the header, there are several form fields for configuring the mailbox:

- Mailbox Name:** Support
- Email Address:** [Redacted]
- Aliases:** [Empty field]
- Auto Bcc:** [Empty field]
- From Name:** Custom Name
- Custom From Name:** [Redacted]
- Status After Replying:** Pending
- Default Assignee:** Person Replying (if Unassigned)
- Email Header:**  -- Please reply above this line --
- Email Signature:** [Rich text editor with a signature block]

The signature block includes a link to the support portal, the Bitergia logo, and the following text:

**Bitergia**  
Support Team  
Central European (Madrid) Time  
Stay connected! @Bitergia on LinkedIn  
@Bitergia on Twitter  
www.bitergia.com  
Software analytics for your peace of mind

At the bottom of the page, there are two buttons: "Save" and "Delete mailbox". On the right side, there is a dropdown menu titled "Insert variable ..." with a list of variables including Mailbox, Conversation, Customer, and User.

# Recorrido en imágenes - gestión de permisos

### General

Company Name

Next Conversation #

User Permissions

- Users are allowed to delete conversations
- Users are allowed to edit notes/replies
- Users are allowed to edit/delete saved replies
- Users are allowed to manage tags
- Users are allowed to manage custom folders
- Users are allowed to manage users
- Users are allowed to manage workflows

Default Language

Timezone

Time Format  12-hour clock (e.g. 2:13pm)  24-hour clock (e.g. 14:13)

### Emails to Customers

Conversation History

Open Tracking

Spread the Word

Add "Powered by FreeScout" footer text to the outgoing emails to invite more developers to the project and make application better.

### Notification Emails to Users

Conversation History

### Permissions

**Selected Users have access to this mailbox:**

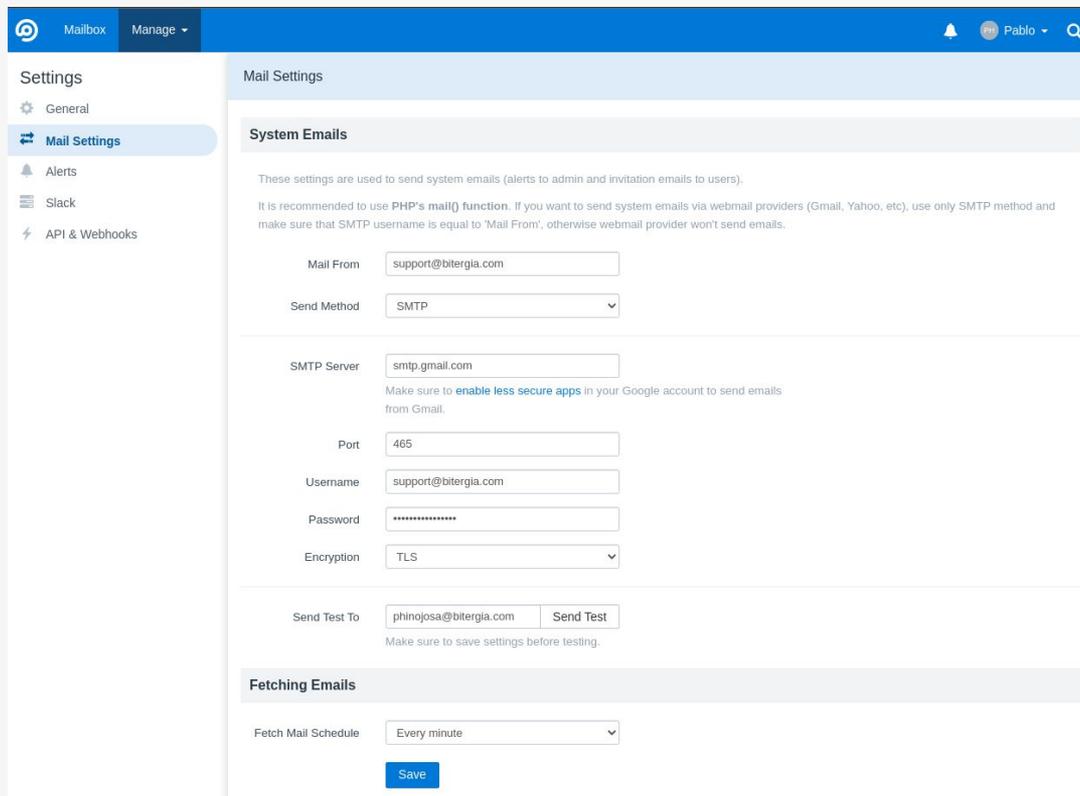
Administrators have access to all mailboxes and are not listed here.

[all / none](#)

### Access Settings:

	Hide from Assign list	Edit Mailbox	Permissions	Auto Replies	Email Signature
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> (Administrator)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> (Administrator)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# Recorrido en imágenes - configuración email sistema



The screenshot shows the 'Mail Settings' configuration page in a web application. The interface includes a top navigation bar with 'Mailbox' and 'Manage' options, and a user profile 'Pablo'. A left sidebar lists settings categories: General, Mail Settings (selected), Alerts, Slack, and API & Webhooks. The main content area is titled 'Mail Settings' and contains two sections: 'System Emails' and 'Fetching Emails'.

**System Emails**

These settings are used to send system emails (alerts to admin and invitation emails to users).  
It is recommended to use PHP's `mail()` function. If you want to send system emails via webmail providers (Gmail, Yahoo, etc), use only SMTP method and make sure that SMTP username is equal to 'Mail From', otherwise webmail provider won't send emails.

Mail From:

Send Method:

**SMTP Server**

SMTP Server:   
Make sure to [enable less secure apps](#) in your Google account to send emails from Gmail.

Port:

Username:

Password:

Encryption:

Send Test To:    
Make sure to save settings before testing.

**Fetching Emails**

Fetch Mail Schedule:

# Recorrido en imágenes - conf email entrada/salida

Support ▾  
support@bitergia.com

- Edit Mailbox
- Connection Settings**
- Permissions
- Auto Reply
- Custom Folders
- Custom Fields
- Saved Replies
- Workflows
- End-User Portal

→

### Connection Settings

**Sending Emails** | Fetching Emails

You can read more about fetching emails [here](#).

Status ✔ Active

Fetch From  [Change](#)

Protocol

Server

Port

Username

Password

Microsoft Exchange ([Help](#))

Encryption

IMAP Folders  [Get folders](#)

Validate Certificate  ⓘ

IMAP Folder To Save Outgoing Replies

Enter IMAP folder name to save outgoing replies if your mail service provider does not do it automatically (Gmail does it), otherwise leave it blank.

[Save Settings](#) [Check Connection](#)

### Connection Settings

**Sending Emails** | **Fetching Emails**

You can read more about sending emails [here](#). To send system emails via webmail providers (Gmail, Yahoo, etc) use only SMTP username is equal to the mailbox email address (support@bitergia.com), otherwise webmail provider won't send en

Method

- PHP's mail() function
- Sendmail
- SMTP
  - Amazon SES - 62 000 free emails per month from Amazon EC2 server.
  - Mailgun - 10 000 free emails per month.
  - SendinBlue - 9 000 free emails per month.
  - Mailjet - 6 000 free emails per month.

SMTP Server

How to [connect Gmail](#) to FreeScout.

Port

Username

Password

Encryption

Send Test To  [Send Test](#)

Make sure to save settings before testing.

[Save Settings](#)

# Recorrido en imágenes - Campos personalizables

Custom Fields [New Custom Field](#)

≡ Type of request \*

Name

Type

Options

- ≡ Question
- ≡ Feature Request
- ≡ Bug
- ≡ Configuration
- ≡ Training

Required

[Save Field](#) [Delete](#)

New Custom Field ✕

Name

Type

Options

- Dropdown**
- Single Line
- Multi Line
- Number
- Date

Required

[Save Field](#)

# Recorrido en imágenes - Personalizaciones

The image displays a software interface with two main sections: 'Saved Replies' and 'Custom Folders'.

**Saved Replies Section:**

- Buttons: 'Saved Replies' and 'New Saved Reply'.
- Header: 'Closing ticket'.
- Form fields: 'Name' (Closing ticket) and 'Reply'.
- Rich text editor: Includes bold (B), italic (I), underline (U), highlight (A), list, link, image, and code (</>) icons. The text reads: 'We have closed this issue. If you want to re-open it ju'.
- Auto Reply Section:**
  - Toggle: 'Enable Auto Reply' (disabled).
  - Subject: 'Re: {%subject%}'.
  - Message: Rich text editor with the same icons as above.
  - Footer: 'Auto replies don't include your mailbox signature, so be sure to add your contact information'.
  - Button: 'Save'.

**Custom Folders Section:**

- Buttons: 'Custom Folders' and 'New Folder'.
- Folder list:
  - Consultancy (consultancy)
  - Engineer (engineer)
  - Marketing (marketing)

A dropdown menu is open over the 'Message' field, showing a list of variables for insertion:

- Insert variable ...
- Mailbox
  - Email
  - Name
  - From name
- Conversation
  - Number
- Customer
  - Full Name
  - First Name
  - Last Name
  - Email Address
  - Company

# Recorrido en imágenes - Logs

The screenshot displays a web application interface for managing logs. The top navigation bar includes 'Mailbox' and 'Manage' menus, a user profile for 'Pablo', and a search icon. The main content area is divided into several sections:

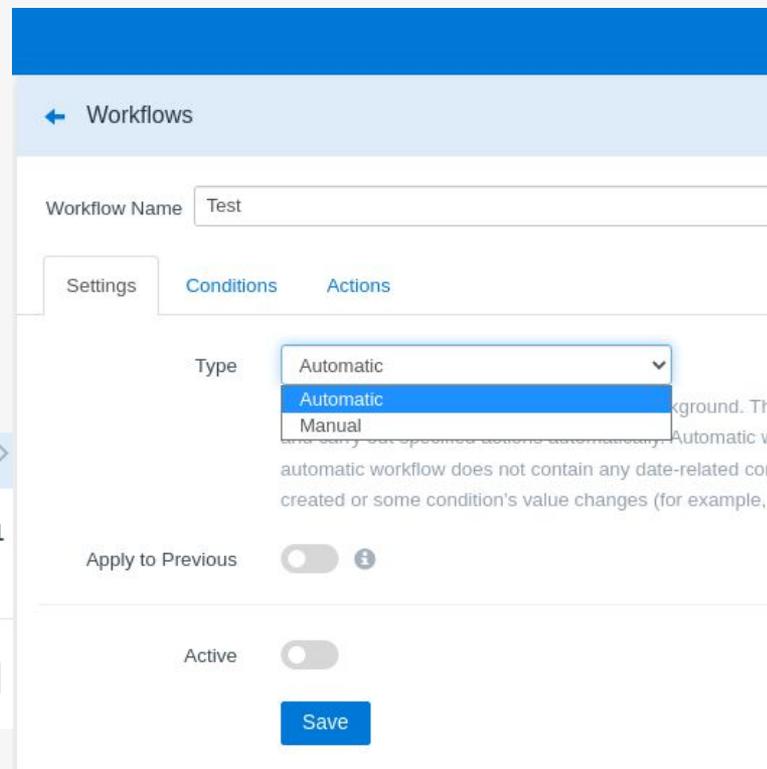
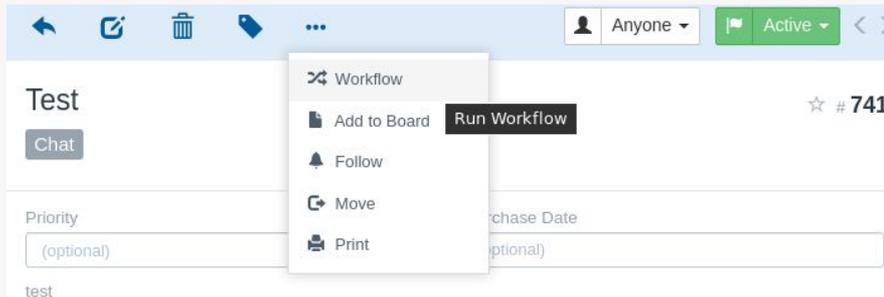
- Logs Sidebar:** A vertical menu on the left with options: 'Outgoing Emails', 'Fetch Errors', 'Send Errors', 'Users', and 'App Logs'.
- Log Records Table:** A table with columns 'Date', 'User', 'Event', 'Ip', and 'Email'. It lists several 'Logged in' events for users like 'Pablo Hinojosa' and 'Virginia Fernández'.
- Log Details Panel:** A panel on the right showing a list of log files (e.g., 'laravel-2022-05-31.log') and a detailed view of a log entry with columns 'Level', 'Context', 'Date', and 'Content'. The content shows an 'error' in the 'production' context.

Date	User	Event	Ip	Email
May 31, 11:06:14	Pablo Hinojosa	Logged in		
May 30, 10:38:41	Virginia Fernández	Logged in		
May 24, 12:35:40				
May 24, 09:17:48				
May 24, 09:17:48				
May 24, 09:17:48				
May 23, 21:28:01				
May 23, 21:28:01				
May 23, 21:28:01				
May 23, 17:21:41				
May 23, 17:21:41				
May 23, 11:52:31				
May 23, 11:52:31				
May 22, 12:54:21				
May 22, 12:54:21				
May 22, 12:54:21				
May 22, 12:54:21				
May 20, 15:25:00		Failed login		

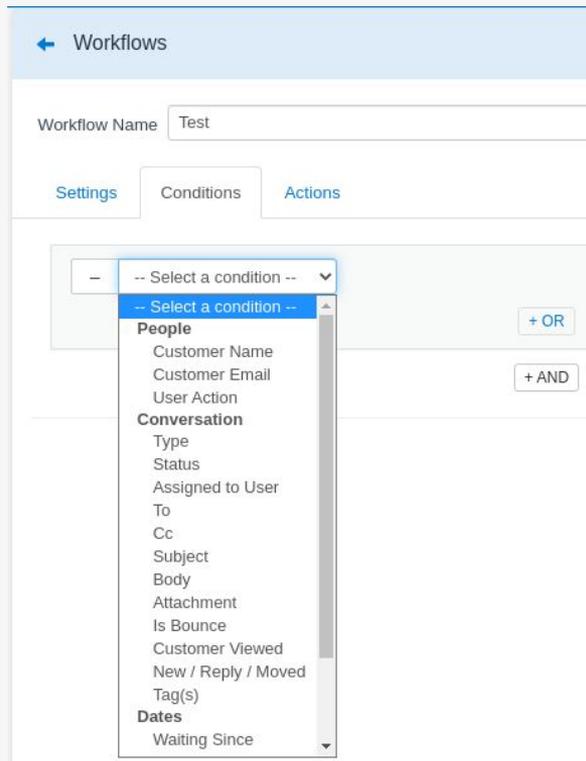
# Recorrido en imágenes - Workflows auto/manual

Automáticas: se ejecutan de manera automática cuando se dan las condiciones

Manual: se ejecutan cuando el operador hace click en la acción



# Recorrido en imágenes - Workflows condición



The screenshot displays a web interface for configuring a workflow. At the top, there is a blue header with a back arrow and the text "Workflows". Below this, a "Workflow Name" field contains the text "Test". Three tabs are visible: "Settings", "Conditions", and "Actions", with "Conditions" being the active tab. The main area shows a list of conditions. A dropdown menu is open, displaying a scrollable list of options. The options are grouped into categories: "People" (Customer Name, Customer Email, User Action), "Conversation" (Type, Status, Assigned to User, To, Cc, Subject, Body, Attachment, Is Bounce, Customer Viewed, New / Reply / Moved, Tag(s)), and "Dates" (Waiting Since). To the right of the dropdown, there are two buttons: "+ OR" and "+ AND".

← Workflows

Workflow Name Test

Settings Conditions Actions

-- Select a condition --

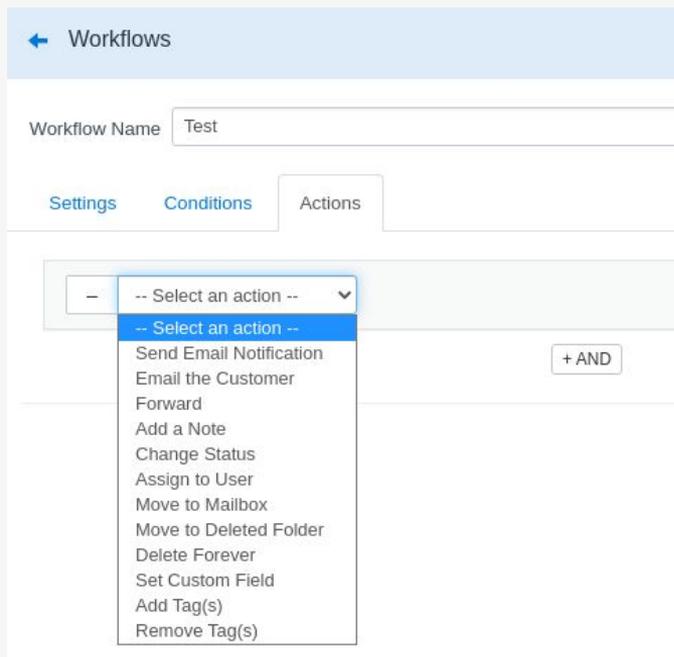
+ OR

+ AND

- People**
  - Customer Name
  - Customer Email
  - User Action
- Conversation**
  - Type
  - Status
  - Assigned to User
  - To
  - Cc
  - Subject
  - Body
  - Attachment
  - Is Bounce
  - Customer Viewed
  - New / Reply / Moved
  - Tag(s)
- Dates**
  - Waiting Since

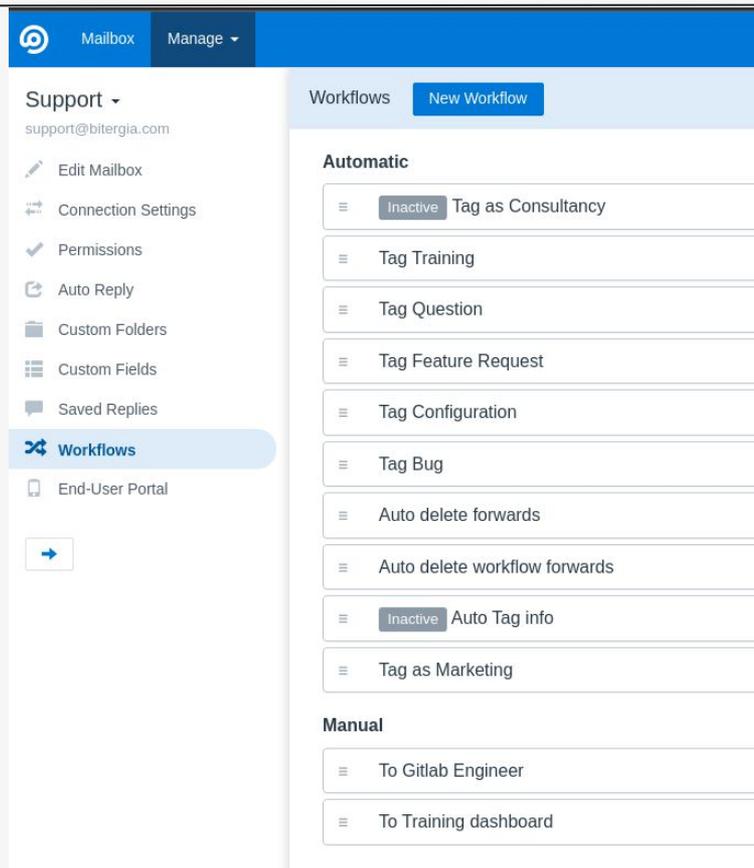
# Recorrido en imágenes - Workflows acción

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The screenshot displays a web interface for configuring workflows. At the top, there is a blue header with a back arrow and the text "Workflows". Below this, a "Workflow Name" field contains the text "Test". Three tabs are visible: "Settings", "Conditions", and "Actions", with "Actions" being the active tab. A dropdown menu is open, showing a list of actions. The first two items are "-- Select an action --". The remaining actions are: "Send Email Notification", "Email the Customer", "Forward", "Add a Note", "Change Status", "Assign to User", "Move to Mailbox", "Move to Deleted Folder", "Delete Forever", "Set Custom Field", "Add Tag(s)", and "Remove Tag(s)". To the right of the dropdown menu, there is a "+ AND" button. In the bottom left corner of the overall image, there is a faint, stylized owl logo.

# Recorrido en imágenes - Workflows listado



The screenshot displays the 'Workflows' management page in a mailbox interface. The left sidebar shows navigation options for 'Support' (support@bitergia.com), 'Edit Mailbox', 'Connection Settings', 'Permissions', 'Auto Reply', 'Custom Folders', 'Custom Fields', 'Saved Replies', 'Workflows' (selected), and 'End-User Portal'. The main content area is titled 'Workflows' and includes a 'New Workflow' button. It lists various workflows categorized into 'Automatic' and 'Manual'.

**Automatic**

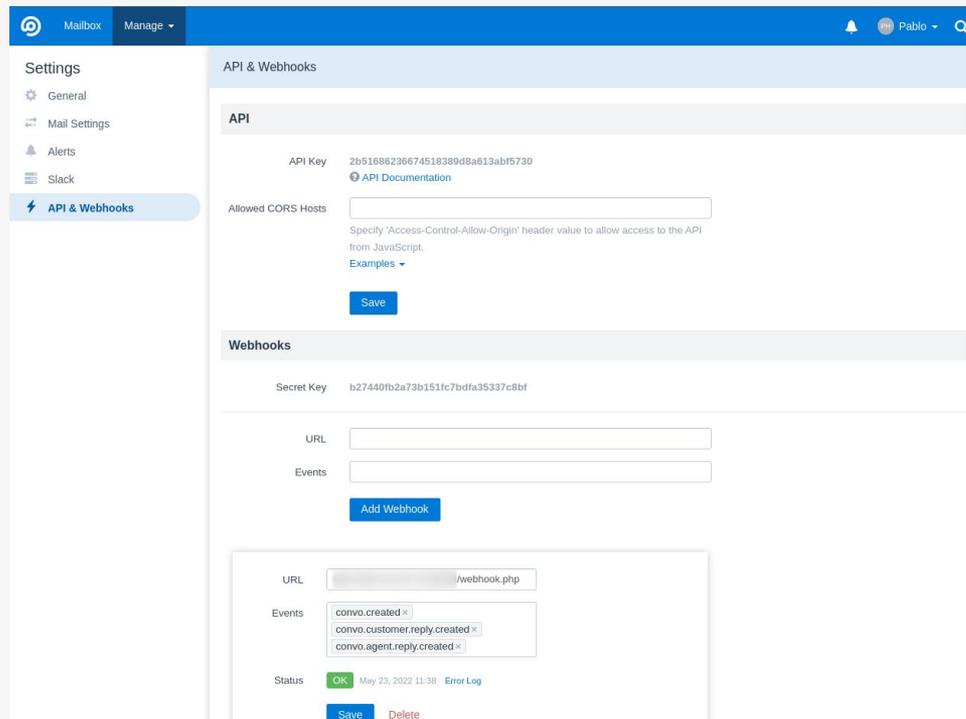
- Inactive Tag as Consultancy
- Tag Training
- Tag Question
- Tag Feature Request
- Tag Configuration
- Tag Bug
- Auto delete forwards
- Auto delete workflow forwards
- Inactive Auto Tag info
- Tag as Marketing

**Manual**

- To Gitlab Engineer
- To Training dashboard

# Recorrido en imágenes - API y Webhooks

## API clon de HelpScout



The screenshot displays the 'API & Webhooks' configuration page in the Mailbox interface. The left sidebar shows the 'Settings' menu with 'API & Webhooks' selected. The main content area is divided into two sections: 'API' and 'Webhooks'.

**API Section:**

- API Key:** 2b51686236674518389d8a613abf5730
- API Documentation:** A link to the API documentation.
- Allowed CORS Hosts:** An empty text input field.
- Instructions:** Specify 'Access-Control-Allow-Origin' header value to allow access to the API from JavaScript.
- Examples:** A dropdown menu for examples.
- Save:** A blue button to save the API settings.

**Webhooks Section:**

- Secret Key:** b27440fb2a73b151fc7bdfa35337c8bf
- URL:** An empty text input field.
- Events:** An empty text input field.
- Add Webhook:** A blue button to add a new webhook.

**Webhook Details (Preview):**

- URL:** /webhook.php
- Events:** A list of selected events: `convo.created`, `convo.customer.reply.created`, and `convo.agent.reply.created`.
- Status:** OK, May 23, 2022 11:38, Error Log
- Save / Delete:** Buttons to save or delete the webhook.

# Recorrido en imágenes - Portal

The screenshot displays the configuration interface for an End-User Portal. The top navigation bar includes 'Mailbox' and 'Manage' on the left, and 'Submit a Ticket', 'My Tickets', and 'Log In' on the right. The left sidebar shows a 'Support' menu with options like 'Edit Mailbox', 'Connection Settings', 'Permissions', 'Auto Reply', 'Custom Folders', 'Custom Fields', 'Saved Replies', and 'Workflows'. The 'End-User Portal' section is active.

The main configuration area is divided into two sections:

- End-User Portal:** Includes a URL field set to 'End-User Portal', a 'Submit a Ticket' button, and a 'Footer' text area containing '© {year} {mailbox.name}'. A 'Save' button is located below.
- Contact Form Widget:** Includes settings for 'Main Color' (set to #ff7700), 'Position' (set to 'Bottom-right corner of the page'), and 'Language' (set to 'English'). Under 'Custom Fields', the 'Type of request' checkbox is checked. A code editor shows the following code:

```
<!-- FreeScout BEGIN -->
<script>var FreeScoutW={s:
{"color":"#ff7700","position":"br","locale":"en","cf":["1"],"id":"2580352872"};
(function(d,e,s){f(d.getElementById("reescout-
w"))return;a=d.createElement(e);m=d.getElementsByTagName(e)
```

A 'Preview' button is at the bottom.

On the right, a preview of the 'Submit a Ticket' form is shown. It features input fields for 'Your Name', 'Email Address\*', and 'Message\*', a 'Type of request\*' dropdown menu, an 'Add attachments' button, and a prominent blue 'Send' button. The footer of the preview indicates '© 2022 Support'.

# Recorrido en imágenes - módulos

[freescout.net/modules](https://freescout.net/modules)

Pago único, no recurrente

Bajo coste (1 o a veces 2 cifras muy bajas)

La mayoría mantenidos por el proyecto, otros por la comunidad

Capacidad para hacer una plataforma interna de trabajo (gestión de issues, kanban, CRM, compras, reports, redes sociales, integraciones comunes...)

## Must have modules (already purchased)

Module	Prize
<a href="#">API &amp; Webhooks Module</a>	15€
<a href="#">Custom Fields Module</a>	10€
<a href="#">Custom Folders Module</a>	9€
<a href="#">End-User Portal Module</a>	13€
<a href="#">Extended Editor Module</a>	3€
<a href="#">Followers Module</a>	9€
<a href="#">Inbox Module</a>	3€
<a href="#">Mentions Module</a>	5€
<a href="#">Saved Replies Module</a>	6€
<a href="#">Sender Time Zone Module</a>	3€
<a href="#">Sent Folder Module</a>	3€
<a href="#">Slack Integration Module</a>	11€
<a href="#">Tags Module</a>	9€
<a href="#">Ticket Number Module</a>	3€
<a href="#">Workflows Module</a>	18€

## Optional modules (not purchased yet)

Module	Prize
<a href="#">Customization &amp; Rebranding Module</a>	13
<a href="#">Satisfaction Ratings Module</a>	11€
<a href="#">Reports Module</a>	18€
<a href="#">Customers Management (CRM) Module</a>	14€

# Pros y contras

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Self-hosted, software libre, comunidad

Falta un proveedor SaaS con ISO 27001, GDPR... al igual que el principal desarrollador no hace desarrollos personalizados

Modular (limpio), pago único y económico, ligero

Gestión del portal y personalización de los formularios escasa  
CRM básico

La herramienta que muchas organizaciones (ONG, fundaciones, PYME, colectivos) necesitan por ser BBB

Problemas con gestión interna de cola de tareas, problemas con proveedores hosting

FreeScout

mola

mazo



¿Preguntas?





**Thank You!**

Pablo Hinojosa Nava

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Bitergia

Celebrating 10 years of software  
development analytics!