



Complete Setup and User Guide

Version 1.0

Built for WordPress support operations

Customer web and email tickets

Main Agent, Manager, and Support Agent roles with per-agent ticket visibility

Backend and front-end Agent ticket desks with AJAX assignment controls

Persistent CC participants, private Internal Notes, attachments, inline images, and emojis

IMAP reconciliation, cron health recovery, failed-message isolation, SMTP, and 10-day diagnostic logging

Customer history, optional WooCommerce context, permanent ticket numbers, privacy, and lifecycle controls

Product page: plugins.guru-is.com/product/guru-support-desk/

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This guide documents the current Guru Support Desk v1.0 behavior in the latest build, including agent roles and ticket visibility, front-end Agent workflows, mailbox reconciliation and cron recovery, rich replies, CCs, private logging, and lifecycle controls.

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Core operating idea

A ticket has one primary customer, one assigned Support Agent, zero or more persistent CC participants, and a chronological conversation. Agent Role controls management authority. Agent View controls which tickets a regular Support Agent may access.

1. Start Here

Guru Support Desk is a self-hosted WordPress support desk for customer web tickets and email tickets. Signed-in customers work from a Support page, email-only contacts can participate through the configured mailbox, and enabled Support Agents can work from wp-admin or the front-end Agent Tickets desk.

Support path	Current behavior
Customer web ticket	A signed-in customer opens a ticket from the Support page, adds normal files or supported inline images, receives Agent responses, and can reply, close, or reopen the conversation.
Customer email	Optional IMAP processing creates a new ticket or attaches the message to an existing ticket using thread headers or ticket-number fallback.
Staff-created ticket	An Agent uses Add New to start a customer conversation. The new ticket is assigned to the creating Agent and starts New with Staff Created.
Known CC participant	A persistent ticket CC can receive selected Agent replies and can reply by email into the same ticket.
Internal Note	An Agent stores private context in the chronological conversation. Notes are never emailed and are excluded from customer-facing output.

- **Permanent ticket numbers.** Public ticket numbers are never reassigned to an unrelated conversation.
- **Derived attention indicators.** Customer Responded, Customer Replied, Needs Reply, and Urgent are indicators, not extra base statuses.
- **Private files.** Attachments are served through permission-checked plugin handlers instead of public Media Library URLs.
- **Mailbox reconciliation.** The configured Inbox is continuously checked against stored support messages so stale UID or Message-ID mappings do not permanently hide mail.
- **Local support data.** The plugin has no telemetry endpoint and does not send ticket content to Guru Plugins.

2. Requirements and Installation

Requirement	Current v1.0 requirement
WordPress	6.2 or newer. The bundled readme is marked Tested up to WordPress 7.1.
PHP	7.4 or newer.
WooCommerce	Optional. Ticketing works without WooCommerce.
PHP IMAP	Required only for inbound email processing and server mailbox cleanup.
Outbound email	Uses WordPress wp_mail(). Dedicated Guru Support Desk SMTP is optional.
Support Agents	Any WordPress user can be enabled as an Agent without changing that user's existing WordPress role.

Installation

- Install the ZIP through Plugins > Add New > Upload Plugin, then activate it.
- Deactivate the legacy Guru Support plugin first. Guru Support Desk blocks simultaneous activation when the legacy GURU_SUPPORT_VERSION constant is present.
- Activation creates or reconciles the ticket, message, attachment, permanent-number, and ticket-CC tables and verifies the current database schema.
- Activation prepares private storage, adds capabilities, schedules mail processing, registers Support endpoints, and establishes a Main Agent when needed.
- Deactivation clears the scheduled mailbox event and refreshes rewrite rules, but it does not delete support data.

Shortcodes

Use `[guru_support_desk]` on the published Support page. The legacy-compatible `[guru_support]` shortcode remains supported.

3. First Setup and Activation Routing

Guru Support Desk checks the minimum conditions needed to operate safely. If required setup is incomplete, the activating administrator is sent to Settings > General once. While setup remains incomplete, opening the bare Guru Support Desk dashboard menu also opens General settings. Other WordPress admin pages are not redirected.

Setup item	What complete means
Support Page	A published WordPress page is selected.
Main Agent	Exactly one enabled Main Agent exists.
PHP IMAP	Required only when IMAP is configured or automatic mail processing is enabled.
Incoming mail	Automatic mailbox processing should be enabled only after IMAP configuration tests successfully.
SMTP	Optional and never required for setup completion.

Recommended first-run checklist

- Create or select the Support page and add `[guru_support_desk]` or `[guru_support]`.
- Open Support Agents and confirm the Main Agent, Role, and Agent View settings.
- Set Needs Reply and Urgent thresholds.
- Configure Button Design and ticket alert colors.
- Configure and test IMAP only if inbound email is required.
- Enable automatic mailbox processing and confirm WP-Cron Health in System Status.
- Configure dedicated SMTP only if Guru Support Desk should override the site mailer for its own messages.
- Set From Email deliberately if used. Fresh installations leave it blank.
- Review Settings > Logs. Diagnostic logging is enabled by default and retained for 10 days.
- Test customer web tickets, agent-created tickets, reassignment, inbound mail, CCs, attachments, inline images, replies, notes, closing, Trash, Restore, and any permanent-delete workflow you will use.

4. Dashboard Orientation

Area	Purpose
Tickets	Working queue, status filters, live search, pagination, bulk actions, Add New, Check Mail Now, and full ticket editing.
Customers	Support-customer directory, live search, Default Support Agent selection, customer details, and permanent ticket-number history.
Agents	Enable any WordPress user as an Agent and configure Agent View and Guru Support Desk Role.
Settings	General workflow/design, Email configuration/testing, Logs, and System Status.

- The top-level wp-admin menu can show a badge with the New-ticket count.
- Enabled Agents receive Guru Support Desk access and ticket-management capabilities. Agents and Settings tabs require settings-management access, which is granted to WordPress administrators by default.
- Permanent deletion requires the dedicated delete capability, which is granted to WordPress administrators by default.

- View Documentation appears below the backend Guru Support Desk title, and a Documentation action link appears on the Plugins screen.
- Ticket lists use AJAX navigation, live search, and schedule-aware refresh behavior.
- Plugin CSS and JavaScript use file-modification timestamps for asset versions so maintenance changes load without changing the public v1.0 version.

5. Support Agents, Roles, Agent View, and Capabilities

Guru Support Desk keeps WordPress roles and Support Desk roles separate. Any WordPress user can be enabled as a Support Agent without changing Administrator, Editor, Author, Subscriber, Customer, Shop Manager, or any custom WordPress role.

Guru Support Desk role	Agent View	Front-end ticket reassignment	Key rule
Main Agent	Always All Tickets	Yes	Exactly one Main Agent exists. It is the fallback assignment destination.
Manager	Always All Tickets	Yes	Can work across the full queue and reassign tickets from the front-end desk.
Support Agent	All Tickets or Only Assigned Tickets	No	Regular Agent. Visibility is controlled by Agent View.

Agent View

- **No saved Agent View means All Tickets.** This preserves existing access when older agents are migrated.
- Only Assigned Tickets restricts a regular Support Agent to tickets assigned to that user.
- All Tickets gives a regular Support Agent access to the full ticket queue but does not grant reassignment authority.
- Main Agent and Manager are forced to All Tickets. Their Agent View selector is visible but disabled.
- Assigned-only restrictions are enforced server-side, not just by hiding table rows.

Main Agent handoff

- There can be only one Main Agent.
- Promoting another enabled Agent to Main Agent happens by AJAX.
- The previous Main Agent automatically becomes Manager and remains All Tickets.
- The current Main Agent cannot be disabled or demoted until another Agent is made Main Agent.

WordPress capabilities

Capability	Default recipients
<code>guru_support_access</code>	WordPress administrators and enabled Support Agents.
<code>guru_support_manage_tickets</code>	WordPress administrators and enabled Support Agents.
<code>guru_support_manage_settings</code>	WordPress administrators by default.
<code>guru_support_delete_tickets</code>	WordPress administrators by default.

6. Ticket Assignment and Agent Disabling

Assignment rules

- Every ticket manually created through Add New by an enabled Support Agent is assigned to the Agent who created it.

- Customer-created and email-created tickets use the customer's saved Default Support Agent when valid, otherwise the Main Agent.
- If an assigned Agent becomes invalid during inbound processing, assignment can fall back through the customer default and Main Agent path.
- Main Agent and Manager see a live Agent dropdown in the front-end Agent ticket table and Edit Ticket view.
- WordPress administrators see the same live assignment control in the backend ticket table and Edit Ticket view.
- A successful reassignment can notify the newly assigned Agent and is written to the diagnostic log.

Disabling an Agent

- Disabling a non-Main Agent is an AJAX workflow.
- If the Agent has assigned tickets, a small modal asks where those tickets should go. The Main Agent is selected by default.
- The destination can be any other enabled Support Agent.
- All tickets assigned to the disabled Agent are reassigned, including closed and trashed tickets.
- Customer Default Support Agent settings that pointed to the disabled Agent are also moved to the selected destination.
- If the Agent has no assigned tickets, disabling can complete immediately.
- The Main Agent must first be replaced by another enabled Agent before the old Main Agent can be disabled.

7. Customer Support Page

- The Support page is for signed-in WordPress users. Logged-out visitors receive a sign-in path that returns them to Support.
- Ticket ownership is enforced server-side before a customer can view or modify a ticket.
- The customer ticket list uses AJAX pagination and displays 20 tickets per page.
- Open New Ticket accepts a subject, rich message, normal attachments, and supported pasted or dragged inline images.
- Customers can view the chronological conversation, reply, attach files, close a ticket, and reply to a Closed ticket to reopen it.
- Customer Close Ticket closes without sending a closure notice back to that same customer and records a system audit message.
- The Close Ticket control is disabled while an unsent customer reply draft exists.
- Internal Notes are excluded from customer queries/output. Quoted inbound email history is removed from customer-facing messages.
- Authorized customers can download only attachments belonging to tickets they own.
- CC participation does not grant customer portal ownership. A CC participant can participate by email but cannot open the primary customer's ticket simply because they are CCed.

WooCommerce My Account

When WooCommerce is active and the option is enabled, Guru Support Desk adds a Support item to My Account. The endpoint renders the same customer or Agent support experience as the configured shortcode, depending on the logged-in user.

8. Front-End Agent Tickets Desk

When the logged-in user is an enabled Support Agent, the Support shortcode replaces the customer portal with the Agent Tickets desk. The front-end desk uses the same ticket data and core AJAX actions as wp-admin while preserving the site's front-end theme presentation.

- The heading includes the logged-in Agent display name.
- Only ticket-management functionality appears on the front end. Agent settings and plugin settings remain backend functions.
- Queue counts, filters, search, pagination, direct ticket access, actions, and attachment access obey the Agent's server-side ticket scope.
- Only Assigned Tickets users see and work only on tickets assigned to them.
- Main Agent and Manager can reassign tickets inline with the Agent dropdown.
- The Agent column displays plain assigned-agent text for regular Support Agents.
- Add New opens as a top-level modal layer so theme/page-builder headers cannot sit above it.
- The Reply/Add Note emoji picker opens as a floating popup near the TinyMCE editor.
- Front-end rich replies support pasted images and hardened AJAX transport while retaining the same server-side validation and sanitization as backend replies.
- The Support page sends no-cache response headers and can refresh front-end security nonces if WordPress rejects an authenticated AJAX request.

9. Settings > General

Setting group	What it controls
General	Support Page, automatic mailbox processing, mail interval, WooCommerce My Account Support.
Response Aging	Needs Reply After and Urgent After thresholds.
Button Design	Font family, weight, size, colors, hover colors, border, padding, radius.
Ticket Alert Colors	Needs Reply and Urgent background/text colors.

- Mail Check Interval accepts 1 to 1440 minutes. The default is 10.
- Needs Reply is at least 1 hour. Urgent is never allowed earlier than Needs Reply.
- Button settings include a live preview.
- General settings save through AJAX and reschedule the Guru Support Desk mail interval.

10. Settings > Logs and System Status

Diagnostic logging

- Logging is enabled by default.
- Retention is fixed at 10 days. Older log files are automatically removed.
- Settings > Logs contains an Enable diagnostic logging toggle and a Download Logs button.
- Log contents are not rendered in the WordPress admin page.
- Operational events include schema repair, cron health and fallback activity, mailbox polling/reconciliation, failed IMAP UIDs, charset conversion warnings, Agent Role/View changes, ticket reassignment, Agent enabling/disabling, and relevant send/import errors.
- The log system is designed for troubleshooting and does not intentionally log mailbox passwords or message bodies.

System Status

Settings > General includes a detailed status list so an administrator can tell the difference between a mailbox connection problem, a cron problem, a schema problem, and a message-import problem.

Status item	What it tells you
WP-Cron Health / Mode	Healthy, missing, overdue, stalled, stale, or paused. Also shows whether native WP-Cron spawning is disabled.
PHP IMAP	Whether the PHP IMAP extension is available.
Database Schema	Whether required tables/columns are healthy and the installed schema version.
Diagnostic Logging	Enabled with 10-day retention or Disabled.
Private Storage	Whether the resolved private attachment storage is writable.
Last Mail Check / Last Cron Completion	Latest poll start/completion heartbeat.
Inbox Recovery / Mailbox Reconciliation	Recovery progress and continuous server/database verification state.
Pending IMAP Retries	Number of individual server messages waiting for another import attempt.
Next Mail Check / Next Catch-up Run	Current recurring or catch-up schedule when available.
Last Error	Most recent mail processing error when one is stored.

11. Ticket Statuses, Customer Response Indicators, and Aging

Base status	Meaning
New	New support work. Staff-created tickets stay New with Staff Created until customer activity changes the workflow.
Open	Active support work.
Pending	Work deliberately parked. Customer replies keep the ticket Pending.
Awaiting Reply	The customer owes the next response.
Closed	Resolved. Authorized customer/CC reply can reopen it.
Trash	Soft-deleted locally. Can be restored or permanently deleted by an authorized user.

Indicators

- **Customer Responded** appears when the latest public message is inbound from the primary customer or a saved CC on eligible New/Open tickets. An Agent reply does not create this indicator.
- **Customer Replied** is the Pending-ticket equivalent. Pending stays Pending after a customer/CC reply.
- **Needs Reply** and **Urgent** are calculated from the configured waiting timestamp and thresholds for eligible New/Open tickets.
- Pending, Awaiting Reply, Closed, and Trash do not age into Needs Reply/Urgent.
- An Agent reply that keeps the ticket Open clears the stale customer-waiting clock, so the ticket does not incorrectly look like the customer just responded.

12. Tickets, Filters, Search, Pagination, and Bulk Actions

- The Tickets desk provides Working and status-oriented queues with live counts.
- Search Tickets is a debounced AJAX field with inline loading feedback.
- Backend and front-end Agent queues use 20 tickets per page.
- Ticket number, Status, Customer, Subject, Agent, and Last Activity are displayed in the queue.

- Status badges can show Staff Created, Customer Responded/Customer Replied, Needs Reply, Urgent, and waiting time where applicable.
- Working and Closed queues support row selection and bulk Move to Trash.
- Any accessible ticket that is not already in Trash can be moved to Trash. The bulk handler does not maintain a narrow hardcoded status whitelist.
- Trash supports Restore. Users with permanent-delete capability also get Delete Permanently, Delete Selected, and Empty Trash.
- All queue counts and results are scoped for Only Assigned Tickets agents.

13. Staff-Created Tickets

- Add New lets an Agent choose or enter a customer, subject, rich message, normal attachments, and supported inline images.
- Customer lookup is AJAX-based and can match WordPress/WooCommerce account details.
- The newly created ticket is always assigned to the Agent who created it.
- The initial ticket starts New with Staff Created.
- The initial outbound message is an Agent message, not a generic customer acknowledgment.
- Staff-created New tickets are excluded from generic automatic acknowledgment retry.
- The Add New modal is rendered above the site stacking context on the front-end Agent desk.

14. Edit Ticket, Replies, Internal Notes, and Navigation

- Edit Ticket shows ticket number/subject, Status, assigned Agent, Customer card, CC summary, conversation, and Reply/Add Note composer.
- Main Agent/Manager on the front end and administrators in wp-admin can change assignment through an AJAX Agent dropdown.
- Reply mode can set Awaiting Reply, Open, or Pending.
- Add Note defaults to the current status and allows the supported note status choices without emailing the customer.
- Internal Notes are stored chronologically with distinct styling and are excluded from every customer-facing query/output path.
- Normal Send Reply returns the Agent to the main Tickets list. Saving a Note stays on the ticket.
- Reply mode includes Send Reply & Close, Close, and Close / No Reply workflows.
- Close controls are protected from discarding an unsent reply draft.
- A normal Agent reply with status Open displays OPEN only unless the actual latest public message is a customer/CC reply.

Reply failure behavior

- The front-end composer displays reply errors beside the composer instead of only at the top of the Support Desk.
- Pasted inline images are flushed before submit. The reply waits for pending image uploads rather than racing the server.
- A front-end HTTP 403 can trigger a one-time fresh security-token request when WordPress actually received the request.
- Rich front-end reply bodies use hardened Base64 transport through admin-ajax.php and are decoded before the same normal validation/sanitization pipeline. This reduces false positives from request security filters without changing stored content.

15. CC Participants and Inbound CC Security

- A ticket can store zero or more persistent CC participants with name and email.
- All current CC participants start checked in the Agent Reply composer.
- If every CC is checked, the toggle says Unselect All. If some or none are checked, it says Select All.
- The Agent can include all, some, or none of the persistent CC list on a specific reply.
- + Add CC adds a new persistent participant by AJAX and checks that participant for the current reply.
- Additional To/Cc recipients on a brand-new inbound email can be captured as persistent ticket CC participants.
- Later inbound messages do not automatically expand the persistent CC list.
- A known CC participant can reply by email into the existing ticket and the message is labeled CC.
- An unknown sender cannot inject content into an existing ticket merely by copying its subject number or thread headers.
- The primary customer remains the Support-page owner. CC participation does not grant customer portal ownership.

16. Customers, WordPress Users, and WooCommerce

- The Customers directory contains people with Guru Support Desk ticket history and deduplicates each customer to one row.
- Search Customers is live AJAX with debounced results.
- Customer display names prefer matched WordPress/WooCommerce account names, falling back to the email sender name for email-only contacts.
- A matched WordPress customer can have a Default Support Agent for future customer/email-created tickets. Choosing Main Agent removes the customer-specific override.
- View Tickets opens the customer's permanent ticket-number history by AJAX, newest first.
- Existing ticket records are clickable. Permanently deleted ticket numbers remain in history as non-clickable permanent ledger entries.
- Customers remain discoverable when their remaining ticket is in Trash because ticket history is permanent.
- When WooCommerce is active, customer/order context can be shown from local WordPress/WooCommerce data.
- WooCommerce My Account Support is optional and uses the same Support experience.

17. Settings > Email

Incoming Mail	IMAP Host, Port, Security, Username, Password, Folder, Spam/Junk Folder Override, Test IMAP Connection, Check Mail Now.
Outgoing Mail	SMTP Host, Port, Security, Username, Password, From Name, From Email, Test SMTP Connection, Send Test To, Send Test Email.
Email Header / Footer	Rich-text content wrapped around standardized customer-facing ticket email.
Email Separators	Line Color, Email Body Color, Body Side Padding, Shadow Height, Spacing Above, Spacing Below.

- Leave the Spam/Junk override blank for automatic folder discovery. One or more exact folder names can be entered when the provider uses custom names.
- Fresh From Email and Send Test To start blank.
- If a saved IMAP/SMTP password already exists, leaving the password field blank preserves the stored secret.
- Passwords can also be supplied by supported wp-config.php constants and are not echoed back into the settings fields.

18. Outbound Email Identity, Threading, Reply-To, and Branding

Customer Reply-To routing

Priority	Reply-To source
1	From Email, when it is a valid email address.
2	IMAP Username, when it is a valid email address.
3	SMTP Username, when it is a valid email address.

- Customer-facing acknowledgments, Agent replies, retries, and closure notifications use the shared HTML wrapper and ticket threading headers.
- Agent notifications and SMTP test messages are internal notifications and do not use the customer-facing Reply-To override.
- From Email controls the wp_mail From address when configured. If blank, the site mail layer can provide its normal From address.
- Ticket mail uses a generated Message-ID plus In-Reply-To and References when a thread exists. The subject carries [GS-####] for fallback matching.
- Support mailbox addresses are blocked from becoming normal customer-facing recipients to reduce loops.
- Normal attachments are passed through wp_mail(), while inline content is embedded by CID.
- Rich Email Header/Footer, separators, and customer-facing button styling are applied consistently to supported ticket emails.

19. Incoming Mail Processing and Mailbox Reconciliation

The configured Inbox is treated as the source of truth for whether server mail has actually become a valid support conversation. UID checkpoints are still used for efficiency, but continuous reconciliation verifies older server messages against the database.

How a server message is considered handled

- Guru Support Desk tracks IMAP UID, UIDVALIDITY, folder, and Message-ID when available.
- A stored UID mapping is accepted only when it points to a real support message attached to a real ticket.
- If a stale UID/Message-ID row points to no ticket, the orphaned database row can be removed and the server email reconsidered.
- If a Message-ID already belongs to a real ticket but its IMAP reference is stale, the existing message row is rebound to the current server UID/folder instead of creating a duplicate.
- A full recovery generation can rescan the Inbox in resumable batches. After recovery, bounded reconciliation continues on future polls.
- Large Inbox catch-up processing stores durable progress so a PHP timeout does not force the next run to restart from the beginning.

How inbound mail finds a ticket

- First, In-Reply-To and References are compared with stored thread headers.
- If no thread match is found, a [GS-####] ticket number in the subject is used as a fallback.
- For an existing ticket, the sender must match the primary customer email or an existing persistent CC participant.
- If the sender is not authorized for that ticket, the message is not inserted into that conversation.

- If no eligible existing ticket is found, normal inbound rules can create a new support ticket for the sender.
- Processed inbound mail is marked Seen. Successful import alone does not delete active-ticket mail from the server.

Failure isolation and charset safety

- Each IMAP message is processed through an exception boundary. One malformed message cannot abort every newer message in the polling run.
- Failed UIDs are retained for retry while newer mail continues.
- MIME charset conversion accepts common aliases such as Windows/CP 125x forms and falls back through mbstring/iconv where available.
- An unsupported or invalid charset is logged and the polling worker continues rather than throwing a fatal ValueError.

20. Spam/Junk Discovery and Automated-Mail Protection

- Guru Support Desk builds an IMAP mailbox catalog and looks for common Spam/Junk names, hierarchy variants, and special-use flags when available.
- A manual Spam/Junk Folder Override can name one or more exact server folders.
- Each detected/configured Junk folder has its own checkpoint.
- Spam/Junk scanning can consider current messages, including legitimate first-time senders, while retaining duplicate, loop, and automation safeguards.
- Known customers and existing support conversations can be matched from Spam/Junk folders under the same sender-validation rules.
- Mail sent from configured Support Desk mailbox addresses is ignored as inbound customer activity.
- mailer-daemon/postmaster senders, Auto-Submitted mail, common auto-reply indicators, bulk/list Precedence, and Guru Support Desk's own X-Guru-Support marker are screened before normal ticket processing.
- Customer-facing sends are also blocked when the recipient is recognized as a Support Desk mailbox address.

21. Automatic Mail Processing, Cron Health, and Catch-Up

- Automatic Mail Processing is disabled until an administrator enables it.
- The custom `guru_support_mail_cron` interval follows the configured 1 to 1440 minute setting.
- A five-minute mail-worker lock prevents overlapping mailbox checks.
- Each automatic run records a start heartbeat, completion heartbeat, processed count, and errors in the diagnostic log.
- WP-Cron Health detects missing schedules, overdue events, stalled previous runs, stale polling heartbeat, and overdue catch-up events.
- A missing event is recreated automatically. The plugin can request a WordPress cron spawn when appropriate.
- If native WP-Cron does not start, Guru Support Desk can queue a protected request-side polling fallback on shutdown.
- If a backlog requires more work than one batch, a one-time catch-up event is scheduled about 30 seconds later.
- The default primary-mail batch is 40 messages and the normal reconciliation allowance is 20 messages, filterable by developers.
- Scheduled processing also retries a limited batch of pending server-mail cleanup and missing customer acknowledgments.
- Manual Check Mail Now uses the same mailbox processing core and reports the number of newly processed mailbox messages.

Production recommendation

WordPress cron is traffic-driven. Sites that require predictable support-mail timing should trigger WordPress cron from a real server scheduler. Guru Support Desk's health checks and fallback are contingency layers, not a replacement for reliable server scheduling.

22. Attachments, Inline Images, Emojis, and Rich Reply Safety

Normal attachments

- Uploads are validated against WordPress allowed MIME types and the site maximum upload size.
- Customers can attach files to new web tickets and replies. Agents can attach files to staff-created tickets and Agent replies.
- Inbound IMAP attachments are stored when the original message or authorized reply is first processed.
- Encoded and split MIME filename parameters are normalized for common mail-client attachment names.
- A Content-ID alone does not make a file inline. CID content is considered inline only when the email HTML actually references that CID.

Inline images and editor tools

- Supported editors accept pasted or drag-dropped PNG, JPEG, GIF, and WebP images.
- Inline uploads are staged in private temporary directories and claimed by the message when saved/sent.
- Abandoned inline temporary directories are cleaned automatically after the retention window.
- Outgoing inline images are embedded through CID, while ordinary files remain normal attachments.
- Agent Reply/Add Note editors include a searchable emoji picker with Most Used behavior stored locally in the browser.
- The front-end Agent desk waits for pending inline-image uploads before submitting a reply.

Private storage and downloads

- The plugin prefers a private folder outside the public document root when the server layout allows it.
- Otherwise it uses wp-content/guru-support-private and writes .htaccess, web.config, and index.php protections.
- GURU_SUPPORT_DESK_STORAGE_DIR can define a custom absolute private storage root. GURU_SUPPORT_STORAGE_DIR remains supported for legacy sites.
- Downloads use controlled handlers with a nonce plus staff permission or customer-ownership checks.
- The resolved file path must remain inside the configured private storage root.

23. Closing, Trash, Restore, and Server Mail Cleanup

Action	Customer/CC email	Result
Send Reply & Close	Sends the composed Agent reply to the primary customer and only the CCs selected for that reply.	Ticket becomes Closed.
Close	Sends the standard closure notification to the primary customer and all current ticket CCs.	Ticket becomes Closed.
Close / No Reply	Sends no draft reply and no closure email.	Ticket becomes Closed.
Customer Close Ticket	Sends no closure email back to that same customer.	Ticket becomes Closed and a system audit message is added.

Trash

- Any accessible ticket that is not already in Trash can be moved to Trash.
- Working and Closed lists can bulk Move to Trash.
- Moving to Trash marks the ticket as trashed before server mailbox cleanup is attempted.
- Restore clears Trash and stale pending-cleanup state.

Mailbox cleanup safety

- The low-level deletion routine refuses to delete server mail unless the ticket is Closed or Trashed.
- New, Open, Pending, and Awaiting Reply tickets are protected even if cleanup is called accidentally.
- Scheduled cleanup retries select only Closed or Trashed tickets.
- Cleanup prefers stored IMAP UID, UIDVALIDITY, and exact source folder, then can fall back to exact Message-ID search across selectable folders.
- If cleanup fails temporarily, the ticket can retain a pending flag for a later scheduled retry while it remains Closed or Trashed.

Important

Successful inbound processing marks mail read but does not delete it. Server mail should remain while the ticket is active. Guru Support Desk cleanup belongs to the Closed/Trash lifecycle.

24. Permanent Deletion and Ticket Number Continuity

- Permanent deletion is allowed only for tickets already in Trash and only for users with the permanent-delete capability.
- Delete Permanently, Delete Selected, and Empty Trash remove the local ticket row, conversation messages, Internal Notes, CC participant records, attachment records, and stored files.
- Before local data disappears, permanent deletion performs a final best-effort server-mail cleanup.
- The permanent ticket-number ledger is not deleted. The public number remains reserved forever.
- The retired ledger entry keeps a SHA256 hash of the normalized primary customer email and clears the active ticket link.
- If a later inbound email references a retired ticket number and the sender hash matches the historical primary customer, Guru Support Desk can create a fresh Open ticket using that same public number.
- A CC participant or unrelated sender cannot claim a retired ticket lineage solely by referencing the old number.
- Fresh installations begin at GS-1001. Existing installations are migrated without renumbering current tickets, and the sequence advances beyond numbers already consumed.

25. Security, Privacy, and Data Retention

- Admin and front-end Agent AJAX actions use Guru Support Desk nonces plus capability checks and server-side validation.
- Front-end customer actions require sign-in and enforce ticket ownership.
- Assigned-only Agent View is enforced server-side across ticket data and private attachments.
- State-changing ticket values are allowlisted server-side.
- Rich content is sanitized through WordPress KSES-based processing before storage/output.
- Internal Notes are excluded server-side from customer message queries.
- Existing-ticket inbound email requires the primary customer or a known persistent CC sender.
- The primary customer remains the portal owner. CC association alone does not grant portal access.

- Private attachment downloads require authorization, a nonce, and storage-root confinement.
- Mailbox/SMTP passwords can be stored as options or supplied through supported wp-config.php constants, and saved passwords are not echoed into settings fields.
- Late-reply lineage uses a SHA256 customer-email hash in the permanent number ledger rather than retaining deleted conversation content for that purpose.
- Guru Support Desk contains no telemetry endpoint and does not send ticket/customer data to Guru Plugins.
- IMAP and SMTP connect only to the administrator-selected mail server. WooCommerce context is read locally from WordPress.
- Deactivation retains tickets, messages, attachments, CC participants, Agent settings, Role/View metadata, and the permanent number ledger.

Site responsibility

Use HTTPS for wp-admin and the Support page, protect wp-config.php, secure the support mailbox account, keep WordPress and plugins updated, and apply a support-data retention policy appropriate to the organization.

26. Troubleshooting

Symptom	What to verify
IMAP Test sees mail but no tickets appear	Download Logs. Check Mailbox Reconciliation, Pending IMAP Retries, Database Schema, Last Error, and individual <code>imap_message_import_failed/exception</code> entries.
Mail polling does not appear to run	Check WP-Cron Health, WP-Cron Mode, Last Mail Check, Last Cron Completion, Next Mail Check, and Last Cron Repair. A server cron is recommended for predictable timing.
One message repeatedly fails	The UID should remain retryable without blocking newer mail. Download Logs to identify the exact UID/error. Unsupported MIME charsets should be logged instead of crashing the run.
Agent sees too many/few tickets	Check the Agent's Guru Support Desk Role and Agent View. Main Agent/Manager are always All Tickets. Support Agent can be All Tickets or Only Assigned Tickets.
Cannot disable Main Agent	Promote another enabled Agent to Main Agent first. The previous Main Agent becomes Manager automatically.
Disabled Agent still owns tickets	Use the disable/reassignment modal. Tickets and customer default-agent mappings are moved to the chosen enabled Agent.
Front-end rich reply gets HTTP 403	The front-end uses hardened body transport and can refresh a WordPress nonce once. If a raw 403 persists, check the host WAF/ModSecurity rules and download logs to see whether WordPress received the request.
Pasted image reply does not send	Wait for the composer to finish the inline upload. The front-end normally waits automatically and displays any failure beside the composer.
Known CC reply creates another ticket	Verify the sender is already stored as a persistent CC and that thread headers or the ticket number are present.
Active-ticket mail disappears	Guru Support Desk blocks cleanup for New/Open/Pending/Awaiting Reply. Check server-side mailbox rules and confirm the ticket was not Closed or Trashed.
Needs Reply appears unexpectedly	Check the current status, waiting timestamp, and configured thresholds. Agent replies with Open clear stale customer-waiting state.
Attachment missing	Confirm MIME/size validation, private storage writability, and that a CID is referenced in the HTML when it should be inline.
Need more detail	Go to Settings > Logs and use Download Logs. Logging is enabled by default and retained for 10 days.

27. Legacy Guru Support Compatibility

- Guru Support Desk refuses to run alongside the older Guru Support plugin when the legacy `GURU_SUPPORT_VERSION` constant is present.
- Deactivate the legacy plugin before activating Guru Support Desk.
- The current build continues to use supported `guru_support_*` data structures/options so existing support data can be preserved across the migration path where implemented.
- The legacy `[guru_support]` shortcode remains supported.
- The legacy `guru-support` endpoint remains registered alongside `guru-support-desk`.
- Legacy IMAP/SMTP password constants and the legacy storage constant are recognized.
- Existing mailbox checkpoints, ticket-number history, schema changes, and Agent metadata are reconciled during activation/upgrade where supported.

Do not run both plugins together

The protection is intentional. The two plugins share legacy support-data concepts and should not be active simultaneously.

28. Daily Operating Guide

- Work from Working. Urgent and Needs Reply items rise ahead of less immediate work.
- Use New for new work, Open for active staff work, Pending for deliberately parked work, Awaiting Reply when the customer owes the next response, and Closed when resolved.
- Treat Customer Responded/Customer Replied as immediate inbound activity indicators. Do not confuse them with Needs Reply/Urgent aging.
- Use Internal Notes for staff-only context that should never be emailed or shown to customers or CC participants.
- Review CC checkboxes before every Agent reply. Existing CCs start selected, but the Agent can include all, some, or none for that specific response.
- Use + Add CC when a new person should become a persistent ticket participant.
- Use Main Agent/Manager inline assignment when work should move to another Agent. Regular Support Agents do not have reassignment authority.
- For Only Assigned Tickets users, remember that reassignment away from the Agent removes that ticket from their accessible queue.
- Use Check Mail Now for an immediate manual pull. Use automatic processing for normal operations and monitor WP-Cron Health.
- Download Logs when mail, cron, rich replies, or schema behavior needs diagnosis.
- Close or Trash only when the corresponding server-mail cleanup is appropriate.

29. Quick Reference

Item	Current v1.0 behavior
Public version	1.0
WordPress / PHP	WordPress 6.2+ / PHP 7.4+; readme tested up to WordPress 7.1
Shortcodes	[guru_support_desk] and [guru_support]
Customer pagination	20 tickets per page
Agent queue pagination	20 tickets per page
Agent roles	Main Agent, Manager, Support Agent
Agent View	Main/Manager always All Tickets. Support Agent = All Tickets or Only Assigned Tickets. No saved value = All Tickets.
Ticket reassignment	Main Agent/Manager on front-end; WordPress administrators in backend.
Agent-created ticket	Assigned to the Agent who created it.
Disabling Agent	Assigned tickets are reassigned by modal; Main Agent is the default destination. Main Agent must be replaced first.
Base statuses	New, Open, Pending, Awaiting Reply, Closed, Trash
Derived indicators	Staff Created, Customer Responded/Customer Replied, Needs Reply, Urgent
Aging defaults	Needs Reply 24 hours; Urgent 48 hours
Mail interval	1 to 1440 minutes; default 10
Mailbox resilience	UID/Message-ID dedupe, failed-UID retries, exception isolation, charset fallback, resumable recovery, continuous Inbox/database reconciliation
Cron resilience	Health heartbeat, schedule repair, catch-up event, protected request-side fallback
Logging	Enabled by default; fixed 10-day retention; Settings > Logs has toggle + Download Logs only
Customer Reply-To	From Email, then IMAP Username, then SMTP Username
CC default on Reply	All existing persistent CC participants checked
Internal Note	Private; never emailed to customer/CC and excluded from customer output
Inbound retention	Processed mail marked read; active-ticket mail is not deleted
Mailbox cleanup	Only Closed or Trashed tickets
Attachments	Private storage; controlled downloads; CID inline only when referenced
WooCommerce	Optional customer/order context and optional My Account Support endpoint
Permanent numbers	Never reused for unrelated tickets; retired lineage verified by primary customer email hash
Front-end Agent desk	Tickets-only desk with role/view-aware scope, AJAX assignment for Main/Manager, rich replies, inline images, emojis, and active-theme presentation

Documentation scope

This guide describes the behavior present in the bundled Guru Support Desk v1.0 build. Site-specific WordPress roles, host security rules, server cron configuration, mail-provider behavior, and third-party plugin policies can affect the surrounding environment.