

Support Desk Customer Reference

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AffStackDev Support Desk gives your team a private workspace for contact messages, warranty registrations, quote enquiries and live chat. This guide explains every public channel, administrative control, presentation setting, request action and integration in the installed plugin. Use it to configure the desk, train support staff and understand exactly what a customer or administrator can do.

Support Desk saves a request before attempting its notification emails. Filing, workflow status, chat messages and email attempts have separate histories. A quote enquiry records the customer's request; it does not create a WooCommerce quotation or order. A warranty registration records submitted information; it does not decide warranty eligibility.

Contents

[What's new in 1.0.8](#)

[Installation and access](#)

[Navigation and workspace preferences](#)

[Public forms and page mapping](#)

[Contact form](#)

[Warranty registration](#)

[Quote request](#)

[Submission and correction](#)

[Public form appearance](#)

[Branding and logos](#)

[Request intake and search](#)

[Quick view and full request](#)

[Organizing and deleting requests](#)

[Request folders](#)

[Workflow and staff conversations](#)

[Your own fields](#)

[File attachments](#)

[Customer portal](#)

[Satisfaction survey](#)

[Suggested answers](#)

[Email replies](#)

[Saved replies](#)

[Due dates](#)

[Automatic rules](#)

[Reports and export](#)

[Personal data export and erasure](#)

[Contact bubble and live chat](#)

[Staff availability](#)

[Visitor chat](#)

[Customer Assist tab](#)

[Spam protection and order verification](#)

[Built in question](#)

[Optional Turnstile](#)

[Plain text rules](#)

[WooCommerce order checks](#)

Blocked senders

Email design and sending

Email branding and layout

Nine message templates

Mail outcomes and history

Compatibility and theme integration

License recovery and signed updates

Data retention and troubleshooting

Reviewed administration with AffStackDev AI

Secure license and Turnstile inputs

Configuration and previews

Requests and staff work

License actions

Completion and recovery

Complete reviewed action catalog

Configuration and presentation actions

Request and folder actions

License actions

Operation recovery actions

What's new in 1.0.8

Release 1.0.8 follows 1.0.7. It adds, each switched off or empty at the start: your own fields on the forms (see Your own fields), file attachments (File attachments), a customer portal where customers see and answer their own requests (Customer portal), a satisfaction survey (Satisfaction survey), suggested answers from your own help pages on the contact form (Suggested answers), customers' email replies filed under their request from your mailbox (Email replies), saved replies (Saved replies), due dates (Due dates), automatic rules (Automatic rules), Reports and Export CSV (Reports and export), and WordPress's personal data export and erasure (Personal data export and erasure). Two messages join the email templates: Customer reply in the portal and Satisfaction survey. A site that switches none of them on works as before. Releases 1.0.4 to 1.0.7 corrected the license screen's place, page views while Support Desk is busy, and the look of the form and chat buttons on some hosts; readme.txt lists each.

Release 1.0.3 follows the launch release 1.0.1.2a. It changes nothing in how the plugin works. The guide built into the plugin describes the current release in the words the screens show (for example **Branding & logos**, **Contact bubble & chat**, **Show the corner contact bubble** and **Go online / renew availability**), and version numbers have three parts from this release on. Everything else in this section came with 1.0.1.2a.

Release 1.0.1.2a was the AffStackDev launch release of Support Desk; WordPress showed it as version 1.0.1.2.1. It contains every change since 1.0.1.1.

Support Desk stays out of the way while it is busy. Support Desk lets only one of its own operations change support data at a time. In 1.0.1.1, every admin page view took that turn and kept it until the page had finished loading, even when nothing changed. As a result, a second admin tab, an autosave, or an AI-reviewed Support Desk action running at the same time made other admin screens answer **503 "Support Desk is busy with another operation"**. Release 1.0.1.2a includes the fix:

- Ordinary admin screens, the storefront, scheduled tasks and plugin update checks no longer take Support Desk's turn when there is nothing to change. If Support Desk really is busy, background license checks and update queries simply wait for the next visit.
- Saving Support Desk settings, sending a reply or another explicit Support Desk action that finds Support Desk busy still shows the existing "please try again shortly" message. Nothing is changed by that attempt.
- A protected Support Desk update that finds it busy says "Try the update again in a minute". The installed files stay as they are.
- Other AffStackDev products' license checks and WordPress's own self-checks (Site Health) are never held up by Support Desk.

The Support Desk workspace, WordPress Plugins and the update system all show the same release number, 1.0.8.

Your license and updates. Each Support Desk license covers one live (Production) site and one test copy of it; an installation set to Staging, Development or Local uses the license's staging place. AffStackDev's current plans do not require a Suite license, and AffStackDev Suite needs no key of its own. Download the plugin from **My Account → Downloads** on affstackdev.com; after activation, WordPress offers new releases through protected updates.

Installation and access

Download the Support Desk plugin ZIP from **My Account → Downloads** on affstackdev.com and install it through WordPress Plugins, Add New, Upload Plugin. Replacing an existing installation keeps requests, legacy records, form pages, designs, branding, spam settings and email history.

Open Support Desk, License and activate the matching Support Desk license. Suite can host the administration screens, but each Support Desk installation requires its own entitlement; Suite needs no key of its own. When Suite accepts the product and your account has Suite access, the desk opens inside AffStackDev. Otherwise, use the standalone Support Desk menu. License recovery also remains available under WordPress Settings, Support Desk license.

The plugin requires WordPress 6.5 or later and PHP 7.4 or later. WooCommerce is optional: it supplies order verification when those checks are enabled. Theme Manager, Suite and Customer Assist are optional integrations. The database stores requests and mail history; its InnoDB workflow tables support assignment, chat and filing transactions.

Administrators receive all eight Support Desk capabilities. Existing WooCommerce shop managers receive request viewing, replying and the export capability, which shows Export CSV on the request list. Staff can be given individual capabilities through WordPress role management; Support Desk does not contain a separate role editor.

Permission	What it allows
View support	Open requests and their private submitted details, history and attached files, and Reports
Reply to support	Change workflow and assignment, save notes, reply by chat or email, file, archive, classify spam and restore
Manage support	Manage sender blocks and open compatibility diagnostics
Manage support settings	Configure forms, your own fields, file attachments, the customer portal, the satisfaction survey, saved replies, due dates, automatic rules, workspace preferences, folders, bubble and spam protection
Edit support layout	Edit each public form layout
Manage support email	Edit email branding and templates and send sample test messages
Delete support	Move requests to Trash and confirm permanent deletion
Export support	Export CSV of the request list, together with View support

Operational screens and services also require an accepted Support Desk license. A blocked license keeps saved records and settings while stopping intake, staff operations, support email and protected updates. An administrator can recover the license without opening private operational content.

Navigation and workspace preferences

The main product navigation contains Requests, Reports, Settings, Compatibility and License, subject to your permissions. Settings contains General, Branding & logos, Forms, Your own fields, File attachments, Customer portal, Satisfaction survey, Form appearance, Emails, Contact bubble & chat, Spam protection, Blocked senders,

Folders, Saved replies, Due dates and Automatic rules. Links stay in their originating Suite or standalone host. If Suite becomes unavailable while a form is being saved, the save returns to the native Support Desk screen.

Under Settings, General, choose Enhanced Admin UI. It is on by default. Enabled mode loads tabs, filters, paging and supported saves in place and provides request quick views. Disabled mode uses ordinary WordPress page loads and POST forms. Both modes use the same authorization and business actions. With JavaScript unavailable, native actions remain usable; live chat requires JavaScript.

Choose 10, 20, 50 or 100 requests per page; the default is 20. Choose Comfortable or Compact list spacing; Comfortable is the default. These preferences apply to the whole support team. The interface mode and list preferences have separate save controls, so changing the interface does not reset spacing or the page size.

Changing a setting uses the revision that was loaded with its editor. When another tab saves first, Support Desk rejects the stale save. Reload the editor and incorporate the current values before saving again. Enhanced mode tracks unfinished POST form drafts, asks before discarding them, protects browser navigation and keeps controls busy during a save. It does not automatically resubmit a write after a timeout.

Public forms and page mapping

Open Settings, Forms. Public forms are initially off. Set the **Support / notification mailbox**, check each page choice, then enable Support Desk public forms and save. Page mapping can append a form to the page's existing content without editing that saved content. Choose a different published WordPress page for each mapped type. You must be able to edit the selected page. Choose Shortcode only to remove a page mapping.

Public field length limits count characters when the server has mbstring and bytes otherwise. Administrative wording and identity settings use the byte limits stated in their tables.

The three shortcodes can also be placed directly in page content or a WordPress Shortcode block:

Form	Shortcode
Contact	[affstackdev_support_contact]
Warranty Registration	[affstackdev_support_warranty]
Quote Request	[affstackdev_support_quote]

If a mapped page already contains a Support Desk shortcode, the plugin does not append another form. The optional Suppress retired WPForms and Addify quote shortcodes setting removes those old shortcode expressions from the rendered content of mapped pages. It does not delete the page's saved content or disable those plugins globally.

Form setting	Default and permitted value
Public forms	Off; enable to accept native form submissions
Contact page	No mapping; published editable page or Shortcode only
Warranty page	No mapping; published editable page different from other mappings
Quote page	No mapping; published editable page different from other mappings
Retired shortcode suppression	Off; applies only on mapped pages
New request prefix	SUP; 1 to 12 letters or numbers, saved uppercase
Support / notification mailbox	WordPress administrator email; valid mailbox required
Public support phone	Blank; up to 50 bytes
From email	Blank; valid mailbox when provided
From name	Blank; up to 120 bytes

The support mailbox receives staff notifications and supplies the default public contact and customer Reply To address. The optional From settings affect mail headers, not the notification destination. Leaving From blank lets your WordPress mail provider control it. An email branding override can independently change the customer Reply To and footer mailbox.

Required fields remain required even if you change their visible labels. Fields of your own are added under Settings, Your own fields, and files under Settings, File attachments; the form design screen changes wording and layout.

Contact form

Field	Requirement and limit
Name	Required; 120 characters
Email	Required; valid contact mailbox, 254 characters
Phone	Optional; 50 characters
Order number	Optional in the base schema; 120 characters; becomes required for Existing order with order verification
Topic	Required; one of the fixed choices below
Message	Required; 10000 characters of plain text

Topic choices are Product / setup, Existing order, Technical support, Commercial project and Other. The first choice is selected initially. With contact order checks enabled, every supplied order number is verified, including numbers provided with another topic. General enquiries without a number remain available to prospective customers.

Warranty registration

Field	Requirement and limit
Name	Required; 120 characters
Email	Required; valid mailbox, 254 characters
Phone	Optional; 50 characters
Product	Required; 200 characters
Product model	Required; 200 characters
Serial number	Required; 200 characters
Purchase date	Required; a real date on or before today's date
Retailer / website	Required; 200 characters; a retailer web address is permitted here
Order / receipt	Optional in the base schema; 120 characters; required with warranty order checks
Notes	Optional; 10000 characters of plain text

Registration confirms receipt of information. The visible registration text and the customer receipt preserve that distinction. The plugin does not calculate coverage, approve a claim, verify a serial number with a manufacturer or create a return authorization.

Quote request

Field	Requirement and limit
Name	Required; 120 characters
Email	Required; valid mailbox, 254 characters
Phone	Required; 50 characters
Company / facility	Optional; 200 characters
Project location	Required; 200 characters
Products	Required; 200 characters
Quantity	Required; whole number from 1 through 1000000
Timeline	Required; one of the fixed choices below
Project details	Required; 10000 characters of plain text

Timeline choices are As soon as possible, Within 30 days, 1–3 months, 3–6 months, 6–12 months and 12+ months. The form records an enquiry. It does not reserve inventory or commit price, freight, a purchase order or a binding quotation.

Submission and correction

Customers complete the fields and the configured human check, then press Send. Successful intake stores the full private request and assigns a reference such as SUP-20261005-000123. The date component is the UTC date at creation; the final component is the WordPress post ID padded to at least six digits. Changing the prefix affects new requests, not existing references.

The receipt page confirms storage independently of customer mail. If the receipt email was accepted by the site's mail layer, the page says so. If its outcome was not confirmed, the request remains saved and the customer should keep the reference. If that customer template is disabled, the page still confirms storage. A submission with identical fields and the same intake token returns the existing request rather than creating a second request or resending its initial mail. Reusing that form with different details is rejected and requires a fresh form.

Field errors show an error summary, links to the affected fields and retained entries. Expired or incorrect verification also returns a corrected form with entries kept. New question refreshes only the verification, keeps the draft and creates no request or email. Signed public form tokens last up to 24 hours; arithmetic questions last 15 minutes. Complete the configured minimum delay, three seconds by default, before sending a new form or chat.

Keep form pages, receipt URLs, the embedded contact endpoint and Support Desk REST traffic out of full page or CDN caching. The plugin supplies no cache headers and the page cache interoperability flag on recognized form pages. Clear existing page caches after changing ownership, public layout, bubble, branding or spam settings.

Public form appearance

Open Settings, Form appearance and select Contact, Warranty Registration or Quote Request. Each has an independent saved layout. Save layout persists it; Preview unsaved layout opens an isolated preview using the submitted design and cannot submit a customer request. The actual page supplies its own surrounding theme content and any theme body override.

Control	Default and bounds
Heading	Contact How can we help?; Warranty Register your product; Quote Request a quote; can be blank, up to 160 bytes
Introduction	Blank; up to 2000 bytes; line breaks retained
Button text	Send message, Submit registration or Request quote; up to 80 bytes; blank restores the corresponding default
Show support email and phone	On; controls full page contact links
Use shared brand colors	On for new layouts; inherited only when shared Forms branding is enabled
Appearance	Support Desk standard or Use theme field and button styles; standard by default
Field columns	One or two; two by default, one in narrow containers
Maximum width	960 pixels; 320 to 1600
Field spacing	20 pixels; 8 to 48
Corner radius	12 pixels; 0 to 32
Accent and button color	#1958a8

Control	Default and bounds
Panel background	#ffffff
Text color	#172236
Button text color	#ffffff

Colors use three or six digit hex values. Shared branding can override these four colors in standard appearance. Existing saved custom layouts keep their independent palette until Use shared brand colors is enabled. Theme appearance inherits the theme's field and button styles while retaining layout, required controls and accessibility structure.

Expand any field to change its label, placeholder, help, order, full row width and visibility. A label is limited to 120 bytes and falls back to the schema label when empty. Help accepts 500 bytes; placeholder accepts 200. Order is 1 through 100; lower numbers appear first. Full row width spans both columns. Select and textarea fields start at full row width. Optional fields may be hidden; required fields always remain visible. Order number is also forced visible when the relevant order verification requires access to it. Changing a label does not change its stored key, validation, required status, choice list or email merge tag.

Two column forms use two columns when their container is at least 560 pixels wide. Embedded bubble contact forms use compact spacing, a semantic hidden heading and Before you send for an introduction. The shared bubble header supplies its identity, so the embedded form does not repeat the public form logo or contact links.

Branding and logos

Open Settings, **Branding & logos**. Brand name can be blank to use the site title, or up to 160 bytes. Choose Use site logo, Use custom logo or Brand name only. Custom mode requires a complete HTTP or HTTPS image URL without credentials or line breaks. The URL can contain at most 2048 bytes. Users with upload permission can use Choose or upload logo to open the existing WordPress Media Library image selector. Logo width is 160 pixels by default, bounded to 60 through 280 pixels.

Choose Site colors, Forest, Midnight or Terracotta as a starting palette. The live preview updates as you edit; it does not save until Save branding is pressed. Site colors clears the six manual colors so detected site values and automatic contrast apply. Forest uses green #276749 with a pale green header. Midnight uses #3155a4 with a dark #14243c header. Terracotta uses #9c422b with a pale #fcf3ed header. Adjust any individual hex value after applying a preset.

The six colors are Brand and button color, Header background, Header text, Panel background, Body text and Button text. Blank accent follows recognized WordPress or theme colors, falling back to #1958a8. Blank backgrounds use white. When text overrides are blank, Support Desk chooses black or white from the corresponding background's luminance. Clearing a color restores that automatic behavior.

The three application switches separately apply shared branding to Contact bubble and live chat, Public form logos and shared form colors, and Support email identity and default colors. All are initially on. These switches change appearance; they do not enable the bubble, public forms or live chat. A form must also opt in through Use shared brand colors. Email must use automatic branding and a saved shared branding configuration; explicit email overrides win.

Saving shared branding requires settings access and access to each currently enabled form or email design scope. Users without a scope's design permission cannot enable that scope by posting its checkbox. The preview depicts appearance; enabled channel choices and field layouts determine the actual customer view.

Request intake and search

Open Requests. Inbox is the default view. Archive, Spam, Trash and All requests have their own counts. All requests contains Inbox, Archive and Spam and excludes Trash. Previously unfiled native and legacy requests appear in Inbox with default workflow state when no overlay exists.

Combine mailbox, folder, request type, status, assignment, due dates (when Due dates is on) and search. Search checks request title, email, phone and reference, including their legacy equivalents. Request type can be Contact, Warranty Registration or Quote Request. Status can be New, In progress, Waiting on customer, Resolved or Closed. Assignment can be all, Unassigned or Assigned to me. The UI's assignment filter supplies those choices; assignment in the individual request can select any eligible support staff member. Folder can be all, Unfiled or a specific folder.

Filter applies the selected criteria. Reset clears criteria within the current mailbox. Requests sort newest first by submission UTC date and then post ID. There is no manual sort control. Paging retains active filters. The table shows reference and title, type, customer email and phone, workflow status, assignee, folder, independent staff and customer initial email state, and submission time. Narrow layouts adapt the table and controls to the available space.

Select checkboxes for bulk actions. Select all selects the current page only, up to 100 requests. A row's action button acts only on that row, even when other rows are checked. Bulk operations return the count of successful

requests and the individual errors. A stale or unavailable record does not imply every other selected record failed; check the reported outcome for each.

Quick view and full request

With Enhanced Admin UI enabled, Quick view opens an accessible dialog containing the original message, all submitted fields, mailbox, status, assignment, folder and blocked sender indication. It shows the most recent 20 activity events and up to three recent email replies. Previous and Next move among requests on the visible list page. Expand gives more room; Compact returns to the smaller dialog. Refresh retrieves current state. Escape or Close returns focus to intake. Open full request opens the complete workspace.

Quick view can save assignment and status, file a request, archive or restore, classify spam, block the sender or recorded connection, move to Trash, or begin confirmed permanent deletion according to permissions. Filing and assignment changes refresh the underlying list while retaining scroll and selection. In standard mode, Quick view follows its link to the full request.

The full request shows its type, submission time, customer details, source URL, storage type and mail state, and when they apply its due dates, customer rating, attached files and Customer portal card. Submitted form data preserves the original values. The workspace contains workflow, complete paged activity, staff notes, live chat reply when available, email reply and saved mail histories. Initial emails have their own history; reply history is separate. A legacy badge identifies records kept from an earlier support system, whose original data is retained.

Organizing and deleting requests

Filing and workflow status are independent. A Closed request can stay in Inbox or be archived; archiving does not resolve a chat. Folder changes and mailbox classification do not send mail.

Action	Effect
Move to Inbox or restore	Returns to Inbox and keeps workflow, folder and history; a sender block remains active
Archive	Removes from Inbox and retains original data and activity
Mark as spam	Moves to Spam; does not block future submissions
Spam plus block email	Moves to Spam and blocks the exact customer email
Block email	Adds an exact email rule while leaving the current mailbox unchanged
Block connection	Adds a rule for the recorded hashed connection; available when a connection was recorded
File in folder	Sets one destination folder; Unfiled removes the folder relationship
Move to Trash	Retains the request and histories for restoration or deletion
Delete permanently	From Trash only, after separate explicit confirmation; deletes the request and its support history

Use the bulk toolbar, row action, row File request control, quick view or full request toolbar. To file a row, expand File request, choose the destination and press File. For a bulk operation, select File in folder and the destination, then Apply to selected. Spam and Trash disable replies and customer chat messages until

restoration. Restore a Trash request before filing or changing it. An active, unblocked archived chat returns to Inbox when a customer successfully sends another message.

Permanent deletion shows the selected references and titles and requires confirmation that requests and histories will be deleted. The request must still be in Trash with the same revision. Delete permanently removes its post, metadata, comments, folder relationships, workflow, messages, notes, saved email history, attached files and request-linked guards. Sender blocks and staff presence remain. A completed permanent deletion requires a backup to recover it.

Support Desk Archive, Spam and Trash overlays have no automatic emptying schedule. Records already placed in WordPress's own Trash remain subject to WordPress's trash behavior until restored. Deactivating or uninstalling Support Desk preserves records and configuration.

Request folders

Open Settings, Folders. Create up to 100 folders, using a nonempty name of at most 80 bytes. Folders are listed alphabetically. Rename changes the folder name without changing the requests. Remove folder requires its confirmation checkbox and leaves its requests Unfiled. Each request has one folder; moving it between Inbox, Archive and Spam keeps that folder. Folders are shared across native and legacy support records and have no public archive or REST view.

Workflow and staff conversations

In a full request or quick view, choose New, In progress, Waiting on customer, Resolved or Closed. Select Unassigned or a user who has both request view and reply permissions; the selector lists up to 500 reply-capable WordPress users and excludes users lacking view permission. Save workflow or Save assignment writes both chosen status and assignee and records who made the change.

Workflow changes require the revision shown in the loaded screen. Another staff member's intervening assignment, filing or workflow change causes a conflict instead of overwriting their work. Notes and messages use one signed action token so a repeated response does not append duplicate content.

Private staff note accepts nonempty plain text up to 12000 bytes. Save private note records it with its author and UTC time. Only staff can see private notes, assignment, status and filing events. Changes made by an automatic rule or by Support Desk itself (a portal reply reopening a request) show Support Desk as the author and the rule's name. Activity displays events in chronological pages of 100. Next activity page continues after the last displayed event. The plugin does not provide editing or deleting individual activity events.

Reply in live chat is available when the request has a bound chat session, that session has not expired and status is neither Resolved nor Closed. A staff chat reply accepts up to 12000 bytes. It appears in the visitor's chat and is not emailed. Setting Resolved or Closed ends message acceptance; changing status back to an active value can allow further messages only while the original chat session is still valid.

Email the customer sends a separate reply to the saved customer email using General staff reply and current email branding. Compose a nonempty message up to 12000 bytes, or start from a saved reply. Preview reply shows the rendered message without sending. Send email reply saves the email snapshot and its outcome. It does not change workflow status automatically. Incoming replies go to the support mailbox and are not imported into this workspace; with the customer portal on, customers can answer inside the request instead. Use the mailbox to read incoming customer email.

Email reply history shows 20 replies at a time, newest first. Older replies continue before the oldest displayed ID. View saved email opens the immutable rendered snapshot. A lost response does not justify blindly resending: check history for the previous action first. A fresh deliberate reply is a separate message.

Your own fields

Open Settings, Your own fields. Each form can have up to 20 fields of your own, shown after its built-in fields. Choose the form, then add a field with its kind, label and whether it is required.

Kind	What the customer enters	Limit
Short text	One line	200 characters
Long text	Several lines	5000 characters
Whole number	0 or a whole number	Up to 999,999,999
Date	A real calendar date, past or future	Years 1900 to 2199
Dropdown	One of your choices; an optional dropdown can stay empty	1 to 50 choices of up to 100 characters each
Checkbox	Ticked or not; a required checkbox must be ticked	Saved as Yes or No

A label has up to 120 characters and is used once per form, compared without regard to letter case and including the form's built-in labels, because a request is saved with each field under its label. Changing a field's label or kind applies to new requests; requests already received keep the label and value they were saved with. Remove field takes the field off the form and leaves earlier requests unchanged. A form saves its own fields with the settings revision, so two open tabs cannot overwrite each other.

Your own fields take part in everything the built-in fields do: Form appearance lists them for wording, help text, order and width (an optional field can be hidden), the same plain-text, link and spam rules check what the customer types, the request page and the export show them, and each is a placeholder in that form's emails. The placeholder is the field's key, such as {custom_1a2b3c4d}, as listed under Available placeholders in the email editor; a ticked checkbox reads Yes.

File attachments

Open Settings, File attachments. Attachments are off at the start. Choose the forms that accept files, the kinds of files, the largest file and the number of files per request.

Setting	Default and permitted value
Forms that accept files	None; any of Contact, Warranty Registration and Quote Request
Kinds of files	Pictures (JPG, JPEG, PNG, GIF, WebP) and PDF documents; plain text files (TXT) can be added; at least one kind while a form accepts files
Largest file	5 MB; 1 to 20 MB, held to the server's own upload limit, which the screen shows
Files per request	3; 1 to 10

The form then shows Attach files below its fields. Each file is checked by its name and by its content: a picture must be a readable picture of the kind its name says, a PDF must begin as a PDF, a text file must be text. Any other kind, including SVG, HTML and program files, is refused. One refused, empty, incomplete or oversized file, or too many files, refuses the whole submission: no request is saved and the form explains why. Browsers do not keep chosen files when a form returns with an error, so the customer chooses them again. When everything the customer sends together exceeds the server's `post_max_size`, the server delivers an empty submission; Support Desk then answers that the files are too large to send together.

A file is stored encrypted (libsodium secretstream, XChaCha20-Poly1305, with its own random key kept in Support Desk's database table) under a random name in a folder with a random name inside the uploads directory, `afsd-support-files`. That folder carries deny rules for Apache and LiteSpeed (`.htaccess`) and IIS (`web.config`) and an empty index file; the file names are never shown. A file opens only through Support Desk's own download: on the request page for people with the view permission, through a link made for that file and that person, and in the customer portal for the request's customer. Downloads are sent as attachments with `nosniff`, a sandboxing Content-Security-Policy and no caching; pictures can also show as a small preview on the request page. Attachments need PHP's libsodium, which current PHP versions include; without it the settings screen says so and attachments stay off.

The request list shows how many files a request has, the request page lists them under Attached files, and the team's notification email and the export name them. Archive, Spam and Trash keep files. Delete permanently, and erasure of personal data, delete them from the table and the disk.

Customer portal

Open Settings, Customer portal. The portal is off at the start.

Setting	Effect
Switch the customer portal on	Customers can see their requests; nothing is shown while it is off
Show "Support requests" in WooCommerce My Account	Adds the tab Support requests to My Account; WooCommerce only
Portal page	Optional published page with the shortcode <code>[affstackdev_support_portal]</code> ; private links open there
Also show requests sent signed out with the account's email address	Off at the start. A signed-in customer also sees the requests sent without signing in with their account's email address. The screen warns that WooCommerce does not confirm that an account's email address belongs to the person who opened the account
Private link in customer emails	Customer receipts and every staff email reply carry a link to that one request
Customers may reply in the portal	Shows a reply box on the request
Customers may attach files to replies	Uses the kinds and limits of File attachments

A signed-in customer sees the requests sent while signed in to that account, including requests sent that way before this release; requests are listed newest first, 20 to a page. With Also show requests sent signed out with the account's email address ticked, the list also holds the requests sent without signing in with the account's

email address (compared without regard to letter case), and the customer opens them without a link; a request that another account sent while signed in, and an erased request, never match. Anyone who opens an account with one of your customers' addresses then sees that customer's earlier requests sent without signing in, with your replies and the files, because WooCommerce does not confirm account addresses; unticking the setting ends this at once. A private link opens one request for anyone who has it; that is how a customer who sent a request without an account opens it. The link's key is calculated from the request and a secret in the site's wp-config.php, so it is not stored anywhere and making it never changes the request. Replace private link, on the request page, ends every earlier link of that request; the next email carries the new one. Changing WordPress's security keys and salts ends every private link. Without a portal page, a private link opens a plain page of its own.

Everyone else, including another signed-in customer, a visitor and anyone trying other request or file numbers, gets the same answer: This request is not available. Requests in Spam or Trash and records kept from an earlier support system are not shown in the portal.

A request in the portal shows its reference, form, date and status in customer words (Received, In progress, Waiting for your reply, Resolved, Closed), what the customer sent with its files, and the conversation: live chat messages, portal messages and the team's email replies that the site's mail system accepted, oldest first, each with its files. Private notes, assignment, workflow and filing history and initial notification emails are never shown. Portal pages are not cached, send no referrer and ask search engines not to index them.

A portal reply is plain text of up to 12000 bytes without links, checked like a form message, with up to the attachment limits when files are allowed; one connection can send 20 replies in 15 minutes. Waiting on customer and Resolved become In progress, recorded in the history as made by Support Desk, and an archived request returns to Inbox; a Closed request accepts no reply. The support mailbox receives the message Customer reply in the portal, with Reply-To set to the customer. Sending the same reply again (for example after a lost response) saves it once and sends the notice once.

With the portal and its private links on, Email the customer offers Files for the customer. The files are added to the request with that reply, the email names them, and the customer opens them in the portal under the reply. They are not attached to the email. The request page's Customer portal card shows who sees the request and its private link.

Satisfaction survey

Open Settings, Satisfaction survey. The survey is off at the start. Choose when to ask (a request set to Resolved, which also covers a request set straight to Closed, or only Closed) and the question (up to 160 characters, How did we do? by default).

About ten minutes after the change, Support Desk sends the customer the message Satisfaction survey from Emails, with a link to a short page: Good, OK or Poor, and an optional comment of up to 1000 characters without links. No email is sent when, at that time, the request is open again, is in Spam or Trash, was already asked or was already rated. Each request is asked once. The email is sent by WordPress's scheduler, which runs with site traffic; when Support Desk is busy at that moment it tries again five minutes later.

Opening the link records nothing. Send saves the answer; the customer can change it later from the same link or, with the portal on, on the resolved request in the portal. Every change is recorded in the request's history (not in the customer conversation). One connection can send 20 answers in 15 minutes. The request page shows Customer rating, or Survey sent, no answer yet. Reports and the export include the ratings.

Suggested answers

Open Settings, Suggested answers. Suggested answers are off at the start. Tick the published pages that answer common questions (pages with a password are not listed) and, if you like, choose one category whose posts also count; then tick Show suggested answers on the contact form. Switching it on needs at least one page or a category. Up to 100 articles are searched: the ticked pages first, then the newest posts of the category. Drafts, private posts and anything with a password are never shown.

While a visitor types the message of the contact form, on its page or in the contact bubble, the form shows up to three matching articles under the message, each with a short excerpt, as links that open in a new tab, so nothing typed is lost. Suggestions appear once the message has 12 characters and follow the text as it changes. An article matches on words of three or more letters; common English filler words are left out, and many plural, -ed and -ing forms count as the same word. A word in the article's title counts 3, a word in its text 1, and an article needs 2 to be shown. The Warranty registration and Quote request forms show no suggestions.

The typed words go to your own site by POST to the REST route `afsd-support/v1/suggest`, so they stay out of web server access logs, and they are not stored. The route answers only with the chosen articles' titles, addresses and excerpts, and with an empty list while suggested answers are off. Without JavaScript the form works as before, without suggestions. A visitor who still sends the form sends it as usual.

Email replies

Open Settings, Email replies. Email replies are off at the start. When a customer answers one of your Support Desk emails, the answer arrives in your mailbox like any email. With Email replies on, Support Desk also files it under its request, as a reply in the customer portal is filed: Waiting on customer and Resolved become In progress, an archived request returns to the Inbox, and the customer sees the message in their conversation in the portal. Support Desk sends no notice email for it; the email itself is in your mailbox.

Enter the mailbox where your customers' answers arrive, usually your support mailbox (the Reply-To of your Support Desk emails): the mail server's IMAP name, the encryption (TLS, usually port 993, or STARTTLS, usually port 143), the port, the user name (usually the address), the password and the folder (INBOX at the start). Gmail, Yahoo and iCloud need an app password for IMAP; a Microsoft 365 mailbox that allows only Microsoft's own sign-in cannot be read this way. Connections are always encrypted, and the server's certificate must be valid for its name. Switching on signs in once with these details; when that fails, the reason is shown and nothing is saved. Test connection signs in with the saved details and reports how many messages the folder holds. The password is kept encrypted with a key from your site's `wp-config.php`; after the site's security keys change it must be entered again, and the screen says so. Remove the saved password deletes it.

Every five minutes, when the site has visitors (WordPress's scheduler), Support Desk reads the messages that arrived since the last check, up to 20 at a time. Only messages that arrive after Email replies is switched on are read. Support Desk only reads: it opens the folder read-only and reads messages without marking them, so the mailbox stays exactly as it was, read or unread. A message is filed only when all of this is true:

- It answers a Support Desk email of the request. Support Desk recognises its own emails (every customer email carries a signed Message-ID, which mail programs repeat in the answer unless the site's mail service replaces it) or the request's reference in the subject, as in Regarding your request [SUP-20261005-000123].
- It comes from the email address the request was sent with (compared without regard to letter case).

- It is not an automatic answer (out of office, delivery report, mailing list); the receiving mail server did not mark it as failing DMARC, or SPF without a valid DKIM signature; the sender is not on the list of blocked senders; and the request is not closed, in Spam or in Trash.

Anything else stays in the mailbox only. The message is filed without the quoted earlier email and the signature where mail programs mark them; text after the quoted part is not kept, and the first 12,000 bytes of text are kept. Attached files are kept as File attachments allows for the request's form (kinds, size and number of files), checked like uploads; files that are not kept are listed in a private note on the request. Pictures placed inside the text of an email are not kept as files. Messages over 10 MB are not read. The same email is never filed twice. If the mail server rennumbers the folder, reading starts again from its end.

Settings, Email replies shows when the mailbox was last checked, what the last check found and how many replies were filed so far; a sign-in or connection problem shows there in words. Deactivating Support Desk stops the checks. Removing Support Desk keeps its settings, as it keeps all its data, the sealed password included: before you remove it for good, tick Remove the saved password and save.

Saved replies

Open Settings, Saved replies. Write up to 100 replies, each with a title of up to 80 characters that only staff see and a plain-text body of up to 12000 bytes. The body can use {customer_name}, {customer_email}, {reference}, {request_type}, {site_name} and {staff_name}; another placeholder is refused. Saving uses the settings revision. Edit and Remove saved reply change only the list: replies already sent and notes already saved keep their text.

People who manage support settings manage the list; everyone who replies to requests can use it. In a request, Saved reply and Insert saved reply appear above Email the customer, Reply in live chat and Private staff note. Inserting fills that box with the reply's text for this request, at the cursor, keeping what was already typed; without JavaScript the request reloads with the text in the box. Nothing is sent or saved until the box's own button is pressed.

Due dates

Open Settings, Due dates. Tick Give new requests due dates and give each form a first-reply target and a resolve target in whole hours, 0 (no target) to 720. Count the hours around the clock, or only in working hours: the chosen weekdays between a start and an end time in the site's time zone from Settings, General.

A request receives its due dates when it arrives; later changes to the targets do not move them. The first reply is the first staff email reply the site's mail system accepted or the first staff live chat reply. An automatic rule's email is not a first reply. Resolved is the latest change to Resolved or Closed; a change back to an open status makes the request unresolved again, measured against the same due date.

The request list shows the next running due date under the status (First reply due in 3 hours, or First reply overdue by 2 hours) and the filter Overdue (open requests past a due date they have not met) or Due within 24 hours. The request page shows both due dates with their result; the export and Reports include them.

Automatic rules

Open Settings, Automatic rules. Add up to 50 rules. A rule has a name, can be switched off, and has conditions and actions; an empty condition matches every request, and a rule needs at least one action.

Conditions	Actions
The form, or any form	Assign to a member of staff who can view and reply
A Contact topic (Contact form only)	Set the status to In progress or Waiting on customer
One of a list of words, separated by commas, found anywhere in what the customer typed, in any letter case	File in a folder
The exact email domain, such as example.com	Email one saved reply, in the General staff reply design

When a request arrives through a form, Support Desk applies the first switched-on rule, in list order, whose conditions all match; Move up and Move down change the order. A rule acts once per request. Live chats are not changed by rules. A staff member or folder that no longer exists is skipped and the rule's other actions still apply. A rule's email is recorded as sent by Support Desk and appears with the email replies; it is not a first reply for due dates.

Closing requests automatically closes requests that have been Resolved for a number of days and requests that have been Waiting on customer for a number of days without a customer message since (0 to 365 days; 0 is off). Support Desk checks once an hour with WordPress's scheduler and closes up to 50 requests of each kind per check. Every change a rule makes is recorded in the request's history with the rule's name.

Reports and export

Requests, Reports is open to everyone who can view requests. Choose the last 7, 30 or 90 days or the last 12 months. Reports counts requests received in the period: by form, and by day (up to 31 days), week (up to 90 days) or month; the median and average time to the first reply and to Resolved; requests still waiting for a first reply; first replies and resolutions in time and late against their due dates (late includes requests still open after the due date); and satisfaction answers. It also shows, at this moment, all requests by status and open requests (New, In progress, Waiting on customer) by assigned person. Requests in Spam or Trash are not counted. One report reads up to 20,000 requests and says so when a period holds more.

Export CSV, under the filters of Requests, downloads every request of the current view and filters, all pages, newest first, as a UTF-8 CSV file. It is shown to people with both the view and export permissions. Columns: reference, form, submitted (site time), view, status, assigned to, folder, name, email, phone, the page it was sent from, first reply due, first reply, resolve due, resolved, attached files, rating, rating comment, and one column for each form field label found among the exported requests. A cell that starts with =, +, -, @, a tab or a carriage return is written with a leading apostrophe, so spreadsheet programs keep it as text. Exporting changes nothing and sends no email.

Personal data export and erasure

Support Desk registers with WordPress's Tools, Export Personal Data and Tools, Erase Personal Data. A person's requests are those whose customer email is the address (compared without regard to letter case) and those sent while signed in to the account with that address, including records kept from an earlier support system.

Export adds one item per request: reference, form, date, status, the submitted fields, the conversation the customer side sees, the names of attached files and the rating with its comment. Private staff notes are not exported.

Erase keeps each request as a record with its reference, form, dates, status, folder and workflow history, so counts and reports remain complete, and removes: the name, email address, phone and every submitted value; the title's name; customer, staff and chat messages, private notes and rating comments in the history; the content and recipient of its saved emails (their send results stay); its attached files; its recorded connection; and the link to the account. Its private link and survey link stop working, and no survey email is sent for it afterwards. A request erased once is passed over by a later erasure. When the address is on the list of blocked senders it stays there, so the block keeps working, and WordPress reports that item as retained. Export and erasure also work while the Support Desk license is not active.

Contact bubble and live chat

Open Settings, **Contact bubble & chat**. The bubble starts off. Its Contact tab starts enabled, Live chat starts disabled and Include Customer Assist starts enabled. Turn on the bubble and the channels you want. Contact uses the public form settings and mailbox, so public forms must be operational to accept requests. Live chat can operate independently of the public forms switch, but still requires licensed Support Desk, the bubble and live chat enabled, working storage and an online staff lease.

Bubble control	Default and bounds
Show the corner contact bubble	Off
Contact tab	On
Live chat	Off
Include Customer Assist	On; requires the compatible public assistant described below
Corner	Bottom right; bottom left also available
Style	Support Desk standard; Use theme colors also available
Accent	#1958a8; valid hex color
Bottom spacing	24 pixels; 12 to 160
Bubble button	How can we help?; 80 bytes
Panel heading	Talk to our team; 80 bytes
Welcome text	Choose how you would like to get in touch.; 500 bytes
Contact tab label	Contact us; 80 bytes
Chat tab label	Live chat; 80 bytes

Bubble control	Default and bounds
AI tab label	AI assistant; 80 bytes
Online message	Our team is online. Start a conversation and we will reply here.; 500 bytes
Offline message	We are offline. Leave a message using Contact us and we will follow up.; 500 bytes

Blank wording restores its default on save. Match offline wording to the channels you enabled. Shared bubble branding takes priority over the fallback appearance while its application switch is on. Theme mode uses supported WordPress base, contrast and primary palette variables when shared branding is off. Position and spacing survive theme changes. A bubble with no available tabs is not rendered.

Customers open the bubble with its button. Tabs use arrows, Home and End for keyboard selection; Escape and the close button close the panel and return focus. Contact loads its same origin embedded form when opened. Open full contact form opens the complete form in a new tab; public email and telephone links remain available beneath it. The full form works without JavaScript. The bubble includes the WordPress privacy policy link when configured.

Staff availability

Switch on **Enable live chat with staff**, then open Requests and select **Go online / renew availability**. This creates a 90 second lease for your account. With the workspace visible and active, JavaScript renews it every 30 seconds and polls activity every five seconds. Go offline ends the lease immediately. Simply logging into WordPress or enabling the chat channel does not make staff online.

Hidden or closed workspaces stop renewal. Five minutes without keyboard or pointer interaction pauses availability and requires **Go online / renew availability** again. A disconnected workspace reports the connection problem; the lease expires. With JavaScript off, use renew availability every minute. The site advertises online when at least one currently eligible staff user has an unexpired lease.

Visitor chat

When staff are online, the visitor enters required name, email and an initial plain text message. Name is limited to 120 bytes, email to 254 bytes and message to 4000 bytes. The visitor completes the selected human check. Starting chat creates a private Contact request with the Live chat topic, stores the initial message and binds it to that browser's private session. No initial staff notification or customer receipt is sent for chat intake.

Both sides see messages through polling about every five seconds. Established visitor messages are limited to 4000 bytes each and retain content checks, sender blocks and rate limits. They do not require a new arithmetic question each time. A valid open conversation can receive saved customer messages while staff are offline. New chat starts still require online staff. Private notes, assignment, workflow events and filing do not appear in the visitor transcript.

The browser session lasts up to 24 hours and is not an account portal or cross device transcript. Closing a tab does not delete the saved request. Start a new conversation resets this browser's access to the earlier conversation; staff keep the original record and history. Closed or Resolved chats reject new messages. During a connection failure, the draft remains and the client retains the same message identity for an unchanged retry rather than duplicating it.

Customer Assist tab

The bubble can embed the public AffStackDev Customer Assist widget when its public assistant is enabled and its installed version is 0.3.1.4a through 0.3.1.5. The plugin combines only that known footer widget contract. Other versions keep their own launcher. Customer Assist continues to own its consent, service connection, limits, answers and conversation handling. Support Desk does not give it private staff notes or human chat transcripts. This customer assistant presentation is separate from the AffStackDev AI reviewed administrative actions.

Spam protection and order verification

Open Settings, Spam protection. The controls affect Support Desk contact, warranty and quote intake, new chats and relevant customer chat follow ups. Staff replies are unaffected by the customer content restrictions. Rejected content does not create a support request or send notifications.

Setting	Default and accepted value
Verification method	Built in question; optionally Turnstile or Off
Turnstile site key	Blank; 10 through 256 permitted key characters when supplied
Turnstile secret	Blank initially; blank input keeps it, replacement rotates it, Clear saved secret removes it
Contact order verification	On
Warranty order verification	Off
Latin alphabet only	Off
Minimum seconds	3; 0 through 15, zero removes the minimum delay
Blocked phrase list	Bundled 280 phrases; editable up to 500 lines and 20000 bytes

Built in question

Built in verification runs on the website without an external account or key. The visitor must check I'm not a robot and answer a short addition or subtraction question. Each question expires in 15 minutes, permits at most five answer attempts and can authorize only one new submission. New question keeps the form entries and does not send them. New chat questions are bound to that browser's session. Standard form refresh works without JavaScript.

Optional Turnstile

Select Cloudflare Turnstile to use the external alternative. Supply production site and secret keys for the public website and WordPress hostnames if they differ. Keys accept letters, numbers, underscore and hyphen. Public testing keys are rejected. Both keys must be present when Turnstile is enabled. To remove a secret, choose another method and select Clear the saved secret; leaving the password input blank alone preserves it. A replacement supplied with Clear selected becomes the newly saved secret.

Turnstile requires JavaScript and contact with Cloudflare. The server validates success, expected form action and one of the configured website hostnames. Missing, expired, malformed or unavailable verification blocks intake. The verification request contains the configured secret and response token, not the customer's message or email. The Retry verification control reloads an expired or failed widget.

Off disables only the arithmetic or external human check. Honeypot, plain text rules, phrases, order checks, signed timing, duplicate protection and quotas remain active.

Plain text rules

Customers should put their contact mailbox in Email and a retailer URL in Retailer / website. Other text fields reject links, web or email addresses, domain names, IP addresses and common disguised link forms. All checked fields reject HTML, common code, JSON or CSS shaped code, executable patterns, encoded payloads, control

characters and invalid text encoding. Messages also reject uninterrupted strings of 100 or more characters, a character repeated 20 times and nonempty content with no letters.

Optional Latin alphabet only applies to textarea messages and notes, not names. It accepts accented Latin letters, numbers, punctuation and symbols. It checks script, not language or whether the text is English.

The phrase list contains categories for SEO and backlinks, website services, marketing and leads, reviews and accounts, investment and crypto, prizes and inheritance, payment and identity scams, suspicious jobs, funding pitches and bulk data. One phrase per line enables it; remove a line to stop matching it or clear the list to remove phrase checks. Matching ignores case, repeated whitespace and common hyphen or underscore separators while keeping word boundaries. Encoded text is normalized before checks. Quoted promotional text can match, so adjust the specific list entry if a legitimate support discussion needs it. Upgrading old phrase revision adds newer bundled phrases while preserving custom entries and earlier removals from the original ten.

New intake attempts share 20 per connection and eight per email over 15 minutes across the forms and chat starts. Invalid submissions count. Successful per form intake and chat starts also have a default six per connection in 15 minutes. Continuing chat attempts have 40 per connection in 15 minutes and a session limit of 30 accepted message attempts per minute. Email design tests have six per user in 15 minutes. Connection quotas use server supplied REMOTE_ADDR; the plugin does not trust visitor forwarding headers.

WooCommerce order checks

Contact verification requires an order number for Existing order and verifies any supplied contact order number against the same billing email. It checks WooCommerce's displayed order number and supports its public order API with either HPOS or legacy storage. Leading hash marks and spaces are removed and comparison ignores case. Trash, auto draft and checkout draft orders cannot match.

For numeric numbers, the direct order ID is considered. A fallback checks up to the newest 100 orders for the billing mailbox. A trusted numbering integration can supply up to 100 additional candidate IDs; the order number and billing email must still match. Orders outside a custom numbering lookup's supported range need that integration or direct mailbox contact. An order number mentioned only in message prose is not checked.

Enable warranty checks only when registration must correspond to an order in this store. The warranty Order / receipt field then stays visible and is required server side. Leave it off for retailer purchases and offline invoices. If WooCommerce or order queries are unavailable, requests requiring an order check cannot proceed and the customer receives the direct contact alternative. Quote requests and new live chat starts do not perform order verification.

Blocked senders

Use Spam plus block email on a request for the quickest classification and exact address rule. Open Settings, Blocked senders to add or remove rules independently. Choose Exact email address, Exact email domain or IP address / connection and optionally supply a private note up to 240 characters. Address input is limited to 254 bytes; exact email domains permit at most 253 bytes. Email and domain matching ignore case. A domain rule affects that exact domain, not its subdomains. IP input is validated and converted to a site specific keyed hash; raw IP is not retained.

Accepted native forms and chats record their hashed connection. Older requests without a recorded connection can still be blocked by email. IPv4 and its mapped IPv6 form identify the same connection. Replacing WordPress

authentication salts changes connection hashes and requires replacement of existing connection rules; exact email and domain rules remain usable.

Search rules by address, domain or private note. Results show 30 per page, newest first, with rule kind, creation UTC time, private note and Unblock. Hashed connection rules display Blocked connection and the rule ID. The plugin does not infer or display the original IP. Duplicate identical rules remain one rule.

Rules reject new native form submissions, contact bubble requests, new chat starts and continuing customer chat. Existing chat checks the saved email, current connection and recorded original connection. Store purchases, customer accounts, incoming mailbox email, third party forms and the separate Customer Assist endpoint retain their own controls.

Unblock removes that rule only. Restoring a request does not remove a block, unblocking does not move old requests from Spam, and deleting a request does not delete sender rules. Remove every matching rule to permit a sender who matched more than one. A changed email or connection can evade a specific rule, so keep the other spam controls configured.

Email design and sending

Open Settings, Emails. **Branding & layout** controls the wrapper; Message templates controls individual text. Select a message and press Open. Saved preview uses example customer data and the current saved configuration. Preview unsaved changes opens the draft as an isolated email without saving or sending. Send test email sends the draft with example data and a subject starting [TEST], but does not create a request or save the draft.

Support Desk uses WordPress's existing mail transport, including SMTP or API plugins already installed. It does not supply its own SMTP server configuration. HTML emails carry a plain text alternative. Staff notification goes to the Forms support mailbox and uses the customer email as Reply To. Receipts, tests and staff customer replies use the resolved email branding support mailbox as Reply To. Optional From headers use the Forms settings.

Email branding and layout

Use site branding automatically is on initially. Automatic detection uses the site title, home URL, form support mailbox and phone, WordPress custom or block site logo, a supported theme's logo helper or site icon, and recognized accent colors. A saved shared branding configuration supplies defaults when its Email scope is enabled. Turning automatic branding off uses the neutral base and keeps explicit overrides.

Control	Default and permitted value
Business name	Blank override; follows site or shared branding, up to 160 bytes
Website URL	Blank override; follows home URL; full HTTP or HTTPS URL, up to 2048 bytes
Support reply email	Blank override; follows Forms mailbox; valid email if supplied
Support phone	Blank override; follows Forms phone; up to 50 bytes
Logo mode	Site logo, Custom email logo or Text only; Site logo initially
Custom logo URL	Blank; complete HTTP or HTTPS image URL without credentials, up to 2048 bytes; required for custom mode
Additional footer text	Blank; up to 1200 bytes
Email width	640 pixels; 480 through 800
Logo width	180 pixels; 60 through 320; shared branding width may supply the default
Button corner radius	6 pixels; 0 through 24

Control	Default and permitted value
Header alignment	Left; Left, Center or Right
Footer alignment	Center; Left, Center or Right
Font	Arial / Helvetica by default; Georgia / Times also available

The eight color overrides are Accent, Header background, Header text, Email background, Content background, Body text, Button background and Button text. Each accepts a valid hex color or blank for the resolved base. Neutral defaults are white header and content, #f2f4f7 email surround, #172236 text and #1958a8 accent/button. An explicit accent also changes a blank button background. A blank button text color is calculated against the resolved button background. Explicit email choices always take priority over shared identity and palette.

Use PNG or JPEG image URLs for typical email clients. The plugin builds its own email wrapper; it does not import the site's frontend CSS. Email and preview clients may load the public image URL. Saving these controls does not change Forms notification destination or optional From identity.

Nine message templates

Template	Use
Contact Customer receipt	Sent after accepted contact form intake
Contact Staff notification	Sent to staff after contact form intake
Warranty Customer receipt	Sent after accepted registration
Warranty Staff notification	Sent to staff after registration
Quote Customer receipt	Sent after accepted quote enquiry
Quote Staff notification	Sent to staff after quote enquiry
General staff reply	Used for explicit replies from a request and for an automatic rule's saved reply
Customer reply in the portal — Staff notification	Sent to the support mailbox when a customer replies in the portal
Satisfaction survey — Customer	Sent to the customer about ten minutes after a request is resolved, when the survey is on

All templates start enabled. Disabling an initial template records Disabled by template setting for that channel while still keeping the request. Disabling General staff reply prevents explicit email replies from the workspace. Test sends exercise the selected draft even when its normal template toggle is off.

The three customer receipts share one initial wording, the three staff notifications share another, and General staff reply has its own wording; the portal notice and the survey have their own wording, described in their sections. With the customer portal and its private links on, the customer receipts, General staff reply and the survey can use {request_link}; when a receipt or a reply does not use it, the line See your request and reply online, with the link, is added at the end. The survey can use {survey_link}; when neither its text nor its button uses it, the line Rate our help, with the link, is added. In a button, these two placeholders keep their full address. The default values are:

Field	Customer receipts	Staff notifications	General staff reply
Subject	We received your {request_type} [{reference}] — {site_name}	New {request_type} [{reference}] — {site_name}	Regarding your request [{reference}] — {site_name}
Inbox preview text	Your reference is {reference}.	A new request is ready for your team.	Your reference is {reference}.
Heading	Thank you for contacting us	New {request_type}	An update from {site_name}
Button label	Visit our website	Blank	Visit our website
Button destination	{site_url}	{site_url}	{site_url}

Default customer receipt body:

Hi {customer_name},

We received your {request_type}. Our team will review the details and follow up as needed.

If you need to add information, reply to this email and include your reference.

Thank you,
{site_name}

Default staff notification body:

{customer_name} submitted a {request_type}.

{request_summary}

Submitted: {submitted_at}
Reply to this email to contact the customer.

Default General staff reply body:

Hi {customer_name},

We are following up on your {request_type}. Please reply with any further details or questions.

Thank you,
{site_name}

Each template has Subject, Inbox preview text, Email heading, Message body, Button label and Button destination. Subject is required, one line and at most 240 bytes. Preview text is at most 240 bytes, heading 160, body 12000, button label 80 and destination 2048. Body is required plain paragraph text; blank lines produce paragraphs. A blank button label hides the button. A shown button requires an HTTP or HTTPS destination, which may start with {site_url}. Unknown merge placeholders are rejected before save, preview or test.

Common placeholders are {site_name}, {site_url}, {site_logo}, {customer_name}, {customer_email}, {reference}, {request_type}, {submitted_at}, {support_email}, {support_phone} and {request_summary}. Type specific placeholders use the field names from the form:

Template family	Additional placeholders
Contact	{phone} {order_number} {topic} {message}
Warranty	{phone} {product} {driver_model} {serial_number} {purchase_date} {retailer} {order_number} {message}
Quote	{phone} {company} {location} {product} {quantity} {timeline} {message}
General staff reply	Contact placeholders plus {reply_message}

The body inserts values once; customer content containing brace text is not interpreted again. {site_logo} supplies an image in HTML and no image markup in plain text. {request_summary} includes submitted field labels and scalar values. General staff reply places the composed response at {reply_message}; if the saved template omits that tag, the response is appended automatically during rendering. Reference and required warranty or quote customer receipt disclosure remain in the wrapper.

Mail outcomes and history

Initial staff and customer sends are independent. A saved attempt captures recipient, subject, HTML, plain text, requested headers, branding, template identity and hash before sending. Later branding or template edits do

not alter saved snapshots. The original attempt for each initial channel is not automatically repeated, including old initial mail history retained from earlier versions.

Outcome	Meaning
Accepted for sending	WordPress's mail layer accepted it
Failed at site mail layer	The transport returned failure
Outcome not confirmed	The attempt is pending or its transport outcome is unknown
Not sent	A rate or availability condition stopped the attempt
Disabled by template setting	That initial channel was turned off
Template could not be rendered	Rendering failed before transport
log_failed	The initial mail history could not be safely reserved

Mail layer acceptance is separate from delivery to an inbox. Use the mail provider's own delivery information and the recipient inbox to determine arrival. Support Desk does not automatically retry failed or uncertain attempts. Saved tests are visible only to their creator with email management permission; the editor shows their newest ten tests. Request email snapshots require request view permission. Snapshot pages disable caching and interactive scripts/forms.

Compatibility and theme integration

Open Compatibility to see native and legacy record counts, current theme, active form processor, legacy guest and signed in handlers, legacy form injection, suspended callbacks, submission guard readiness, mail history, workflow storage, Suite registration, Theme Manager and the three mapped pages.

Ownership state	Operational meaning
Disabled	Public forms are off
Standalone	Support Desk owns processing through mappings or shortcodes
Theme contract	Support Desk owns processing and the theme's ownership hook identifies its pages
Legacy cutover	The callbacks of one supported earlier theme release are suspended for this request
Unknown legacy	An unrecognized legacy workflow remains untouched and native cutover is blocked
Storage unavailable	Submission guard storage is not ready and cutover is blocked

The supported legacy transfer from that earlier theme verifies its template identity, version, support source checksum and expected callbacks. It does not delete or edit theme files. Cached retired theme submissions are shown a fresh Support Desk form with their entries for review instead of sending them through two processors. Turning public forms off restores applicable theme behavior on the next request. Original `mos_support_request` records and their original reference numbers remain readable in the unified desk and are not rewritten as native requests.

Theme Manager discovers Public form layouts, Email design and Contact bubble as owning plugin editors. Mapped or shortcode pages identify their Support Desk form layout as a content source. The WordPress page editor still controls surrounding page content. Existing Theme Manager section arrangements may require adding the relevant editor card through Arrange sections.

Classic and block themes can use the standard form appearance or inherit theme controls. Trusted theme PHP can override the form body while Support Desk keeps validation, security controls, storage and mail. Page builders can arrange the public shortcodes. The theme must call the normal WordPress head and footer hooks for assets and the bubble. Changing a theme does not remove plugin owned layouts, branding or requests.

License recovery and signed updates

The license screen shows current status, canonical site, environment, shortened installation identity, plan, last accepted check, last attempted check, next due check and applicable permission deadlines. Activate uses a matching product key and Production, Staging, Development or Local environment. An existing active credential fixes its environment. The key is used for activation; encrypted installation credentials authorize subsequent operations.

Check now or recover activation validates the current installation and resolves a pending activation. Retry pending deactivation continues the same outstanding release intent. Deactivate license requires confirmation and releases the site's remote activation only after a verified response. Updating, disabling or uninstalling the WordPress plugin does not release the remote slot.

Prepare reconnection is offered after a site identity move or unreadable credential. Changing the WordPress environment type (`WP_ENVIRONMENT_TYPE`), for example when a staging copy becomes the live site, counts as a move: deactivate the license first while the identity still matches, then prepare reconnection after the change and activate again, so the released place is free. Confirmation clears local licensing state. A moved or cloned site receives a new installation identity; a same site credential recovery keeps its identity. Reenter the license key afterward. Reconnection does not release the original site's remote activation.

Automatic validation runs every 12 hours with up to 15 minutes of jitter. Eligible administrator visits and ordinary frontend PHP traffic can retry an overdue check when cron fails. An accepted license permits operation for at most 72 hours after its last accepted validation, capped by an earlier server entitlement or grace deadline. Received read only, hard lock, kill switch, revocation or suspension policies stop the desk. Errors do not create a trial or extend a deadline.

The signed update section shows readiness, installed release verification, last update status and Check for updates now when available. Updates require the licensed installation, the server's installation token updates capability, Sodium, ZipArchive, a trusted release key and WordPress update permissions. The updater verifies the package's identity, requirements, version and every signed runtime file before installation. WordPress controls manual and automatic update preference. The desk's license and signed update checks do not grant permissions to other products.

Data retention and troubleshooting

Native request envelopes, legacy data, source URLs, contact details, form values, messages, staff notes, workflow, folder relationships, mail snapshots, branding and settings remain private WordPress or plugin database data. Sender connection and rate identifiers are keyed hashes. Temporary expired guard cleanup does not delete business requests or mail. Uninstall preserves records, settings, plugin granted capabilities and

attached files in the uploads folder afsd-support-files; there is no delete all data control or automatic mailbox import. WordPress's personal data tools export and erase a person's support data (see Personal data export and erasure).

Symptom	Check and available action
Public form unavailable	Check license, public forms enabled, Compatibility ownership and guard storage
Wrong or missing form	Check page mapping or shortcode, distinct published editable pages and cached content
Save rejected after another edit	Reload the current editor or request; preserve newer changes and prepare the edit again
Branding does not change a form	Check shared Forms scope, that form's Use shared brand colors and standard appearance
Email ignores shared identity	Check automatic email branding, saved shared Email scope and explicit email overrides
Bubble missing	Check license, enabled bubble and at least one usable channel; clear page cache
AI tab absent	Check Customer Assist public configuration, allowed version and known widget footer callback
Staff appears offline	Use Go online / renew availability ; keep Requests visible, interact within five minutes and check the 90 second lease

Symptom	Check and available action
Visitor chat unavailable	Check bubble and chat enabled, license, REST access, browser cookies, same origin and staff availability
Message rejected	Use plain text within field limits, remove links/code, review phrases and complete fresh verification
Order cannot be verified	Match displayed order number and billing email; confirm WooCommerce and custom numbering lookup
Sender still blocked after restore	Remove all matching rules in Blocked senders
Receipt or reply not arriving	Check stored outcome and existing WordPress mail provider; inspect accepted versus failed/unknown history
Connection lost during a save	Reload request/history to establish current state before preparing another write
No recorded connection on old request	Block its valid email or add an independently known IP rule
Overdue license check on cached site	Open License and Check now, use eligible PHP activity or restore the scheduler

Reviewed administration with AffStackDev AI

Support Desk registers 69 installed administrative operations with AffStackDev AI: 26 configuration and presentation operations, 34 request and folder operations, seven licensing operations and two operation recovery controls. The assistant can inspect supported private facts, prepare exact changes and submit the approved changes through the same native services used by the Support Desk screens. The registered provider is `support_desk`; every action starts with `support_desk..` The public Customer Assist bubble tab is a separate customer channel and does not acquire administrative access through these registrations.

Use the connected WordPress administrator account. The provider requires `manage_options`, an appropriate `store:read`, `store:propose` or `store:apply` scope in the consumer, the native permission for the selected operation and an accepted Support Desk license for operational support actions. License status and recovery operations remain accessible when licensed support operations are locked. Read operations return private support information to the authorized administrative session; private notes remain private in the customer's chat.

Start with the current action catalog and inspect the selected request or configuration. Prepare a project with the exact action ID and its typed parameters. The proposal identifies the current saved state, individual before and after values and native effects. Review that exact project in the WordPress AffStackDev AI screen, then apply the approved revision. Editing the proposal, its dependencies or its target invalidates the earlier approval. A stale proposal must be prepared again from current state.

The installed provider requires MySQL or MariaDB and InnoDB for all owner tables: WordPress options, posts, postmeta, terms, term taxonomy and term relationships, plus Support Desk guards, workflow, activity, presence, mail and sender blocks. Native configuration screens remain the direct editing interface. The provider's availability result identifies an unsupported database instead of offering a different write path.

Secure license and Turnstile inputs

For a reviewed activation or Turnstile secret replacement, open WordPress Settings, Support Desk AI inputs. Select Support Desk license key or Turnstile secret key, enter the secret and select Stage secure input. Staging saves an encrypted, account and site bound input; it does not activate a license or change spam protection. Copy the returned 32 character hexadecimal reference to the assistant. The reference expires after ten minutes, so prepare and review its use promptly.

Use a license reference as `key_reference` in `license_activate`, together with `production`, `staging`, `development` or `local`. Use a Turnstile reference as `patch.secret_reference` in `spam_update`. The native ordinary license activation screen continues to accept a key directly for a human initiated activation. The AI proposal receives the opaque reference and a fingerprint, never the key or Turnstile secret. A staged input becomes bound to the exact execution marker that first uses it. Another project cannot reuse that input after execution has claimed it.

License keys contain 1 to 128 bytes after trimming and no control characters. Turnstile secrets contain 10 to 256 letters, numbers, underscores or hyphens and cannot be public test credentials. If a reference expires or belongs to a different account, site or purpose, stage a fresh input and prepare a new proposal. The staged secret is encrypted with AES 256 GCM under the site's authentication salt. Changing that salt makes the encrypted input unreadable.

Configuration and previews

Update actions use partial patches. Supply at least one supported field; omitted fields keep their saved values. A boolean must be true or false, and numeric settings must be integers within their stated bounds. Unknown keys, unsupported form fields and invalid values are rejected. The native settings tables in this guide define defaults and clearing behavior. In particular, page ID zero removes that mapping; an empty optional identity or color restores its native fallback; a blank button label or field label restores its native default; an empty optional form heading hides it. Required form fields cannot be hidden.

Shared branding retains its form and email permission checks. Form layout updates use saved fallback colors as the editable values, while the design read also returns the resolved branded appearance. Changing one email template preserves the other templates and branding. Saving settings sends no email. Email and form previews render unsaved draft patches without saving. Form previews are disabled, tokenless demonstrations; they cannot accept a submission. The full native isolated preview remains available in its corresponding editor.

For Turnstile, omission of `secret_reference` preserves the stored secret. `clear_secret:true` explicitly removes it. Choose clearing or replacement in one proposal. Read results expose whether a secret is saved and its fingerprint, without returning secret material. The ordinary spam update accepts up to 16384 bytes of `blocked_phrases`. For a larger saved list, use `spam_phrases_append` or `spam_phrases_remove` with chunks of up to 12000 bytes. Appending retains existing lines. Removal matches complete trimmed phrase lines, case insensitively. The native complete list still permits at most 500 lines and 20000 bytes.

An email test is a separate sending action. It requires one explicit recipient and a fixed template key, optionally with unsaved branding and template patches. The proposal fixes the exact recipient, test subject, body and rendered identity. Sample data uses a fixed submitted time of 2026 01 15 at 12 00 00 so the content reviewed is the content submitted to the native mail owner. Test sending does not save the draft or create a request. Its native rate limit and current actor's history still apply. A finished receipt records the accepted, failed or not sent site mail outcome; accepted describes the site mail layer's result. Read the saved native history to investigate an incomplete attempt.

Email draft previews return complete plain content through UTF 8 byte windows, with optional offset zero through 250000 and length 1 through 8000, defaulting to zero and 8000. Follow `next_offset` until it is empty and retain the returned total byte count and content fingerprint. An offset inside a character or a window too short for its next character is rejected. The test proposal retains the complete expanded text in its human review and stores its hash and byte count in the snapshot. If that complete review would exceed 50 rows, use Support Desk Emails to review and send the draft directly. That capacity boundary neither truncates the text nor saves or sends it.

Requests and staff work

Request reads combine native and retained legacy records. Search supplies explicit native mailbox, form type, workflow status, folder and assignee filters. A reviewed search page contains at most 20 requests. The request identity includes its reference, customer details, source, filing, assignment, optimistic revision, initial mail outcomes and a fingerprint of complete submitted data.

Complete submitted values, saved email bodies and rendered reply previews use UTF 8 byte windows of up to 8000 bytes. Follow `next_offset` while retaining the returned fingerprint to read the whole record. The offset is a byte offset, not a character count. An offset inside a multibyte character is rejected. Submitted text is normalized JSON containing both keyed values and the saved labeled fields. Saved email bodies can be read as plain text or HTML. Session tokens, arbitrary private metadata and customer chat credentials are not returned.

Private activity pages contain at most 20 events and 24000 encoded bytes. Follow `next_after_id` for later activity. Request mail history contains at most 20 attempts per page, newest first; use `next_before_id` for earlier attempts. A test snapshot requires email permission and belongs only to the actor who created the test. Staff search scans existing accounts in bounded pages; an empty page may mean the accounts scanned lacked the required native view and reply permissions. Continue with the supplied offset when more accounts remain.

Workflow updates require an explicit status and assignee ID; zero unassigns. Notes, chat replies and email replies accept nonempty plain text of at most 12000 bytes. A note appends private activity. A chat reply requires an existing unexpired native customer chat outside Resolved, Closed, Spam and Trash. It appends one customer visible staff event without sending email. A reply preview renders the current General staff reply without saving or sending; previewing can show a disabled template, but submitting the reply requires that template to be enabled.

Reviewed email replies freeze the request, template, branding, recipient, subject, reply text and rendered fingerprints. The native mail owner saves its snapshot before the transport call and reports a confirmed accepted or failed outcome. An interrupted or pending attempt remains available for observation through the same project and native mail history. Recovery does not resend the reply.

Every filing action has an individual and a bulk registration: Inbox, Archive, Spam, Spam and block sender, Block email sender, Block sender connection, File, Trash and Permanently delete. Reviewed bulk actions permit 1 to 20 unique exact request IDs; the native human bulk form permits up to 100. The review shows each selected target. File requires a folder ID, with zero unfiling. Permanent deletion requires requests already in Trash and `confirm_permanent_delete: true`. Requests and histories are retained by ordinary filing and Trash; permanent deletion removes their original records and saved history. Sender blocks remain.

Folder operations read all folders, create, rename or explicitly remove one. Removal requires `confirm_remove: true`, removes its relationships and keeps the requests. The shared native maximum is 100 folders and 80 bytes per name. Reviewed names must be trimmed single line plain text and unique without case distinctions. The connected account's presence can be set online for its native 90 second lease or set offline. The visible workspace must renew the lease to keep that person online. Sender actions list, add or remove exact native rules. Adding an IP rule converts the supplied IP to the site's private connection fingerprint; raw IP values are not persisted in the block table. A duplicate existing rule with a different note is rejected rather than edited.

License actions

The reviewed license actions read local status, read update readiness, activate, check or recover, deactivate, reconnect and check signed update metadata. An uninitialized installation must first be opened in the native license screen to create its installation identity. Local status and readiness reads do not initialize it, contact the license server or refresh updates.

Activation uses the staged key reference and selected environment. An installation with an active credential cannot change its environment. Pending activation, pending deactivation, unreadable credentials or a moved identity must be recovered before activating another key. Check or recover invokes the native Check now operation; when a remote deactivation is pending, that explicit operation retries the pending deactivation instead of validating an active license.

Deactivation and reconnection each require `confirm: true`. Deactivation releases the remote slot after acknowledgement and preserves support data. Reconnection clears local unreadable or mismatched credentials; a same site keeps its installation identity and a moved copy receives a new identity. It does not release the original remote activation. The signed update check requires update permission and all protected updater

requirements, checks metadata and refreshes WordPress update inventory. Select installation and automatic update preferences in the native WordPress Plugins screen.

Completion and recovery

Each approved execution carries a durable exact marker and claims its native targets before mutation. Current plugin code, site, account, capabilities, license, database schemas, dependencies and target state are checked again before the owner runs. Native Support Desk writers use the same site owner mutex so a conflicting supported write cannot interleave with the reviewed operation. The provider keeps ordinary native workflow transactions; it does not wrap a remote request or mail submission in a replacement transaction.

A completed operation returns the native saved result after readback. If a connection interrupts a bulk action, some selected requests may already have changed. If a mail or license request loses its response, the external effect may already have happened. The provider retains that operation's claim and fences instead of starting the same intent again. Inspect and reconcile the same project. Reconciliation reads its durable evidence and authoritative saved state; it never sends mail, validates a license, renews presence, edits records or retries a write. An incomplete result reserves the conflicting target against a different reviewed project until the original project's result is established or its reservation is explicitly released. Normal human native screens can be used to inspect and edit current state after the uncertain operation, making pending proposals stale. A completed receipt remains a historical record even if someone later edits the target.

`intent_read` inspects bounded identity, status, timing and recovery metadata for an exact durable claim owned by the connected account and site, with whole claim, evidence, result and reservation fingerprints and reservation count. If a claim remains uncertain after inspecting native request, mail or license state, prepare `intent_release` with its exact marker and `confirm:true`, then give that release its own fresh native review. Release is allowed only for an unreleased executing, unknown or rejected owner claim whose AI project is unknown, or whose project has been executing for at least 180 seconds. The site mutex prevents release while a native owner is actively holding that mutex. Release removes only target reservations still owned by the selected marker and appends durable release evidence. It retains the original claim, evidence and unknown business outcome. It does not repeat, reverse or mark the original business effect complete. A later business operation requires a separate exact review of current native state. Recovery controls remain available during a license lock.

Use the full native screen for secure key entry, Media Library upload or selection, WordPress plugin installation and automatic update preferences, role administration and unsupported changes. The exact action catalog below identifies every operation the installed provider exposes.

Complete reviewed action catalog

All action IDs below carry the `support_desk.` prefix. Read actions inspect existing native facts or render drafts; change actions require their own exact approved project. Native permissions, bounds and clearing rules remain those in the corresponding chapters.

Configuration and presentation actions

Action suffix	Mode and purpose
forms_update	Change. Review a bounded nonempty patch of fixed native forms fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.
desk_update	Change. Review a bounded nonempty patch of fixed native desk fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.
branding_update	Change. Review a bounded nonempty patch of fixed native branding fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.
bubble_update	Change. Review a bounded nonempty patch of fixed native bubble fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.
spam_update	Change. Review a bounded nonempty patch of fixed native spam fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.
email_branding_update	Change. Review a bounded nonempty patch of fixed native email branding fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.

Action suffix	Mode and purpose
email_template_update	Change. Review a bounded nonempty patch of fixed native email template fields. Omitted fields retain their saved value; explicit blanks use native clear or fallback rules. Saving sends no email.
contact_design_update	Change. Patch the fixed native wording, layout, fallback colors and known field controls for the contact form. Required fields remain visible; lower order numbers sort first. Saving changes no validation or stored request fields.
warranty_design_update	Change. Patch the fixed native wording, layout, fallback colors and known field controls for the warranty form. Required fields remain visible; lower order numbers sort first. Saving changes no validation or stored request fields.
quote_design_update	Change. Patch the fixed native wording, layout, fallback colors and known field controls for the quote form. Required fields remain visible; lower order numbers sort first. Saving changes no validation or stored request fields.
contact_form_preview	Read. Render the selected saved or patched native form without saving and with submission controls disabled. Returns native preview content and HTML fingerprint; theme overrides are shown on the actual page.

Action suffix	Mode and purpose
warranty_form_preview	Read. Render the selected saved or patched native form without saving and with submission controls disabled. Returns native preview content and HTML fingerprint; theme overrides are shown on the actual page.
quote_form_preview	Read. Render the selected saved or patched native form without saving and with submission controls disabled. Returns native preview content and HTML fingerprint; theme overrides are shown on the actual page.
spam_phrases_append	Change. Apply a bounded newline-separated phrase chunk through the native spam owner. Appending preserves current lines; removing matches normalized whole phrase lines. The complete saved list retains its native five-hundred-line and twenty-thousand-byte limits.
spam_phrases_remove	Change. Apply a bounded newline-separated phrase chunk through the native spam owner. Appending preserves current lines; removing matches normalized whole phrase lines. The complete saved list retains its native five-hundred-line and twenty-thousand-byte limits.
configuration_get	Read. Read one fixed configuration section, its revision and relevant native readiness. Turnstile secret material is never returned.

Action suffix	Mode and purpose
form_design_get	Read. Read saved fallback layout and effective branded layout for one known form, with fixed schema field choices.
email_template_get	Read. Read one saved native email template and its supported placeholders.
email_preview	Read. Render the selected saved or patched native email with example customer data without saving or sending. Returns plain content and exact HTML fingerprint; full isolated preview stays in the native email editor.
email_test_send	Change. Send one exact reviewed native example-data email to one explicit recipient, with [TEST] subject, native rate limit and durable native mail history. The draft is not saved and no support request is created. Local acceptance does not prove inbox delivery.
email_test_history	Read. Read the connected staff member's ten most recent native test attempts and stored acceptance/failure outcomes without resending.
presence_get	Read. Read the connected staff member's current lease and whether enabled chat currently has available staff.

Action suffix	Mode and purpose
presence_set	Change. Opt only the connected staff member online for the native ninety-second lease or offline. The visible native workspace renews it; enabling chat does not opt anyone online.
sender_blocks_list	Read. Search the native email, exact-domain and hashed-connection block list with its thirty-row page bounds. Raw connection IPs are not stored.
sender_block_add	Change. Create one native exact-email, exact-domain or site-hashed IP connection rule with an optional private note. Blocks affect support intake and chats; purchases and account access are unchanged.
sender_block_remove	Change. Remove one selected existing native sender rule. Other rules and requests are retained.

Request and folder actions

Action suffix	Mode and purpose
request_search	Read. Read a bounded private request page using the native combined modern and legacy request ledger and its mailbox, folder, assignment, type and search filters.
request_read	Read. Read one private request identity, mailbox, assignment, initial mail outcomes and complete submitted-data fingerprint. Original and legacy content remains unchanged.
request_submitted_text	Read. Read the complete normalized original values and labeled fields as UTF-8 JSON in bounded byte windows. Follow next_offset and retain the content fingerprint; no session credentials or arbitrary metadata are exposed.
request_activity	Read. Read a bounded page of original private notes, workflow events and staff/customer chat messages. Staff-only events remain private and this operation does not impersonate a customer chat session.
request_mail_history	Read. Read a bounded page of durable initial and reply email outcomes. Accepted establishes site mail-layer acceptance; pending or unknown outcomes do not authorize a resend.
request_mail_snapshot	Read. Read bounded UTF-8 windows from a saved email plain or HTML body with its recipient, subject and outcome. A test message is visible only to its original actor with email-design permission.

Action suffix	Mode and purpose
request_reply_preview	Read. Render the exact current General staff reply with the selected request and reply text without storing or sending it. The preview supplies bounded plain-body windows and exact recipient, subject and render fingerprints.
request_workflow_update	Change. Change one available request to an explicit native workflow status and eligible support assignee; zero unassigns. Append the native private workflow event and increment its optimistic revision.
request_note_add	Change. Append one plain-text private note to an available request using native actor-bound event deduplication. The note is not returned to customer chat and no email is sent.
request_chat_reply	Change. Append one staff reply to an existing unexpired native customer chat outside resolved/closed status and Spam/Trash. The customer can read the message through its own cookie-bound session; no email is sent.
request_email_reply	Change. Submit exactly one reviewed reply through the native Mailer, storing its rendered snapshot and durable site-mail outcome. No automated retry occurs and site acceptance does not establish inbox delivery.

Action suffix	Mode and purpose
request_inbox	Change. Move or restore selected requests to Inbox without removing sender blocks.
request_inbox_bulk	Change. Move or restore selected requests to Inbox without removing sender blocks. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
request_archive	Change. Archive selected requests and retain originals, chat and history.
request_archive_bulk	Change. Archive selected requests and retain originals, chat and history. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
request_spam	Change. Mark selected requests as Spam and disable replies and chat without adding a sender block.
request_spam_bulk	Change. Mark selected requests as Spam and disable replies and chat without adding a sender block. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.

Action suffix	Mode and purpose
request_spam_block	Change. Mark selected requests as Spam and add an exact email sender block for future Support Desk submissions and chat.
request_spam_block_bulk	Change. Mark selected requests as Spam and add an exact email sender block for future Support Desk submissions and chat. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
request_block_email	Change. Add exact saved customer email sender blocks while retaining the current mailbox.
request_block_email_bulk	Change. Add exact saved customer email sender blocks while retaining the current mailbox. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
request_block_connection	Change. Block the recorded site-local connection of selected requests without revealing its private hash.
request_block_connection_bulk	Change. Block the recorded site-local connection of selected requests without revealing its private hash. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.

Action suffix	Mode and purpose
request_file	Change. Replace each selected request folder with one valid folder; folder zero explicitly unfiles it.
request_file_bulk	Change. Replace each selected request folder with one valid folder; folder zero explicitly unfiles it. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
request_trash	Change. Move selected requests into retained Support Desk Trash; originals and history remain until separately confirmed permanent deletion.
request_trash_bulk	Change. Move selected requests into retained Support Desk Trash; originals and history remain until separately confirmed permanent deletion. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
request_delete	Change. Permanently delete selected requests already in Trash, including their saved notes, messages and email history; sender blocks remain.

Action suffix	Mode and purpose
request_delete_bulk	Change. Permanently delete selected requests already in Trash, including their saved notes, messages and email history; sender blocks remain. At most 20 exact request IDs per reviewed project; native per-target owner effects may be partial on interruption and are never automatically replayed.
folders_read	Read. Read all current private request folders, their native identities and membership counts. This catalog is limited to the native 100-folder maximum.
folder_create	Change. Create one new named private request folder through the shared native folder service. Existing names and the 100-folder limit are checked before the reviewed write.
folder_rename	Change. Rename one existing private request folder through the same native owning service without changing its request memberships.
folder_delete	Change. Remove one explicitly confirmed private folder and its request relationships. Requests, originals, events and mail history are retained and become unfiled.
staff_search	Read. Read a bounded page of existing accounts with both effective view and reply capabilities for assignment. No roles, permissions or accounts are changed.

License actions

Action suffix	Mode and purpose
license_status	Read. Read the current local license identity, permission, recovery state and deadlines without contacting the license service.
license_update_readiness	Read. Read local signed update requirements, trusted key fingerprints and the last saved update check.
license_activate	Change. Use a native secure license key reference once to activate this exact installation through the Support Desk license owner.
license_validate	Change. Run the native explicit Check now operation. It can recover a pending activation or retry a pending remote deactivation.
license_deactivate	Change. Explicitly release this site remote activation through the native license client while retaining support data and settings.
license_reconnect	Change. Clear this copy local license credentials when its identity changed or its credential cannot be read. A moved copy receives a new identity; the original remote activation is not released.
license_update_check	Change. Run the native fresh protected metadata check and invoke the ordinary WordPress update inventory refresh path. Installation remains a native WordPress operation.

Operation recovery actions

Action suffix	Mode and purpose
intent_read	Read. Read this account exact durable operation claim and evidence without retrying its business effect.
intent_release	Change. After native review explicitly release this account uncertain operation target reservations. Keep its exact claim and evidence, and never repeat its business effect.