Getting Started with Zendesk®

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Getting Started with Zendesk® Lotus

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Contents

Zendesk versions

On 9/12/12, we released a new version of the agent and administrator interface of Zendesk. During the beta period, this was known as 'Lotus'. The Zendesk you knew before 9/12 is now referred to as 'Zendesk Classic'.

This version of the Getting Started Guide is for the new version of Zendesk.

You can find the Getting Started Guide for the Classic version online at *https://support.zendesk.com/forums/20025588-getting-started-guide-zendesk-classic* and a PDF version can be downloaded from *http://www.zendesk.com/support/documentation*.

Chapter 1

Solving your first ticket

In this lesson you'll learn the basics of ticket management in Zendesk, including how customers submit tickets and how those tickets appear in your Zendesk. You'll submit a ticket as a customer using email, then you'll respond to the customer and resolve your first ticket as an agent using Zendesk.

Submitting your first support ticket

Whenever a support request is received in Zendesk, a ticket is created.

Tickets can be created through multiple channels including email, your website, social media, online chat, and phone. Regardless of where conversations are started, they all become tickets.

In this lesson, you'll pretend to be a customer and submit a support request through email.

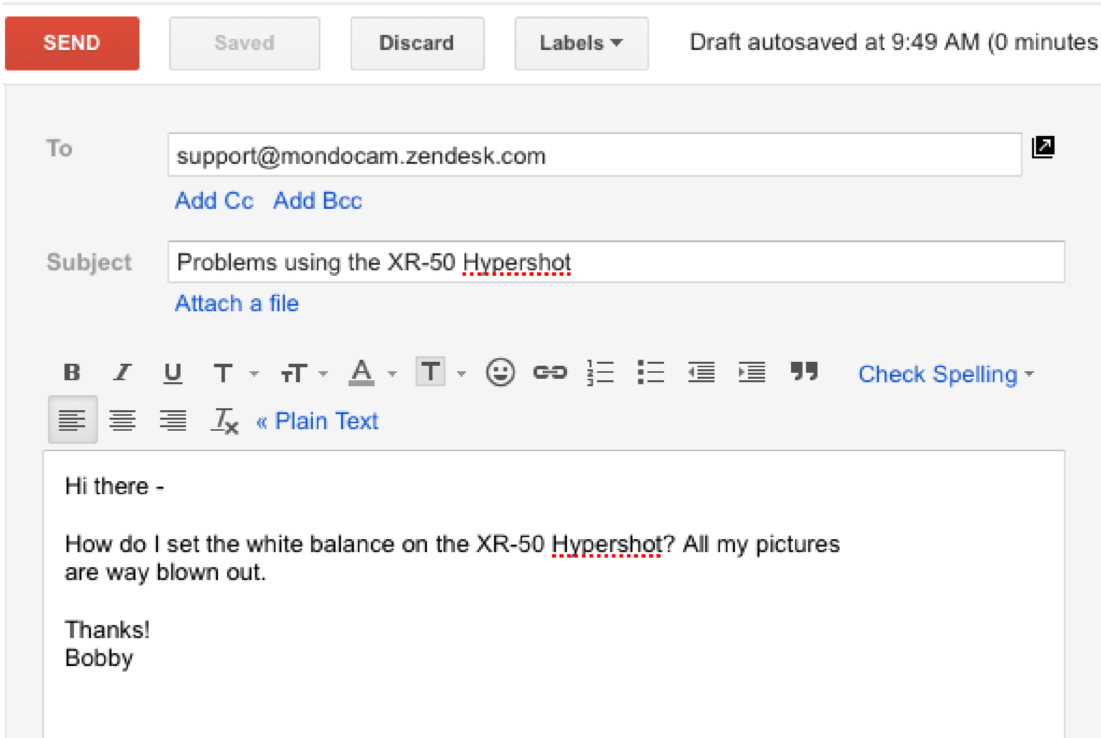
When you signed up for your Zendesk account, you were given a Zendesk support email address: support@*youraccount*.zendesk.com. You can see your account name in the URL displayed in the address bar when you are logged in to Zendesk.

Note: You can change this email address. We'll discuss how you do that in the next lesson.

To submit a test ticket

1. Open a new email message in your email client.

   Tip! If you are an administrator, send test email from a an email account other than the one you used to set up your Zendesk account. Zendesk recognizes your email as the owner of the account and treats it differently than email from another email account.
2. Enter support@*youraccount*.zendesk.com in the **To** field. For example, support@mondocam.zendesk.com.
3. Enter a subject and message. If possible, write a question or problem you might get from a real customer.



4. Click **Send**. Your email is sent and a ticket is created in Zendesk based on the email.

Responding to a support ticket as an agent

When a customer sends a support request through email or any other channel, it becomes a ticket in your Zendesk. Tickets are organized into *views*.

Views define a collection of tickets based on a set of criteria that convey various ticket states such as open and unassigned, pending, and unsolved. Views are essential for managing the ticket workflow because they create meaningful groupings of tickets.

New tickets appear in the **Unassigned tickets** view. Let's find the test ticket you submitted and respond to it.

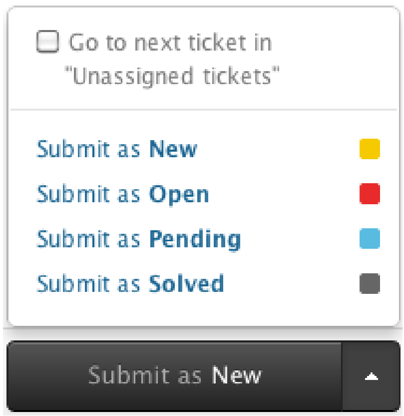
To find and update your test ticket

1. Click the **Views** icon (☰) in the sidebar, then select **Unassigned tickets** in the list of views.
2. Click the title of the test ticket you submitted from the list of unassigned tickets.

Now let's update some of the ticket fields and add a comment. A Zendesk ticket has predefined fields but you or your administrator can also add custom fields as needed (see *Assigning tickets to agents*).
3. Click **Assignee** and select your name.

4. Click the **Type** field and select **Question**. That means that the customer is asking a question. Other types include Problem, Incident, and Task.
5. Click the **Priority** field and select **Normal** from the drop-down menu. You can also set priority to **Low**, **High**, or **Urgent** as needed.
6. Type a message in the **Public reply** comment box.

   Public reply comments are sent to the customer whereas Internal note comments are only visible to other agents. In this case, let's ask the customer to give us more information.
7. Click the arrow on the **Submit** button and select **Pending**.

   The Pending status means that you are waiting for more information from the customer.

   For more information about ticket statuses and other ticket fields, see *About ticket fields*.

   The ticket is updated and an email message is sent to the customer!

Responding to a support ticket as a customer

When you update a ticket, Zendesk notifies the customer. Go back to the email account you used to submit the support request to see what the notification emails looks like. In your email account you will see two replies:

- Email confirmation that the support request was received
- Email notification that the ticket was updated and needs more information

These replies were automatically sent out by Zendesk by something called a ***trigger***. Triggers are business rules an administrator defines (there are also some pre-defined triggers) that run immediately after tickets are created or updated. Triggers are a powerful tool; you'll create a trigger in *Assigning tickets to agents*.

To update the ticket from the customer perspective

1. In the email account you used to submit the support request, open the email about the ticket update.

   The title contains the problem you entered in the original support request. The body contains the support request and the comment you added when you updated the ticket as an agent. There is also a link to the ticket.

Ticket #758: Problems using the XR-50 Hypershot

Your request (#758) has been updated.

To review the status of the request and add additional comments, follow the link below:
http://support.zendesk-staging.com/requests/758?token=p646ywpcchaq5ds

You can also add a comment by replying to this email.

Jennifer Rowe, Apr 09 10:02 am (PDT):

Sorry to hear that. Would you be able to attach what you are seeing in your images? We want to ensure it's not a problem with the sensor first.

Thanks!
Jennifer

Bobby Bob, Apr 09 09:53 am (PDT):

Hi there -

How do I set the white balance on the XR-50 Hypershot? All my pictures are way blown out.

Thanks!
Bobby

2. Click **Reply** and type a comment in the email.
3. Optionally, you can add an attachment so that you can see how it appears in the ticket in your Zendesk. Sometimes customers will need to send attachments to help you understand their problems.
4. Click **Send**.

   The email is sent and your reply is added to the ticket as a comment.

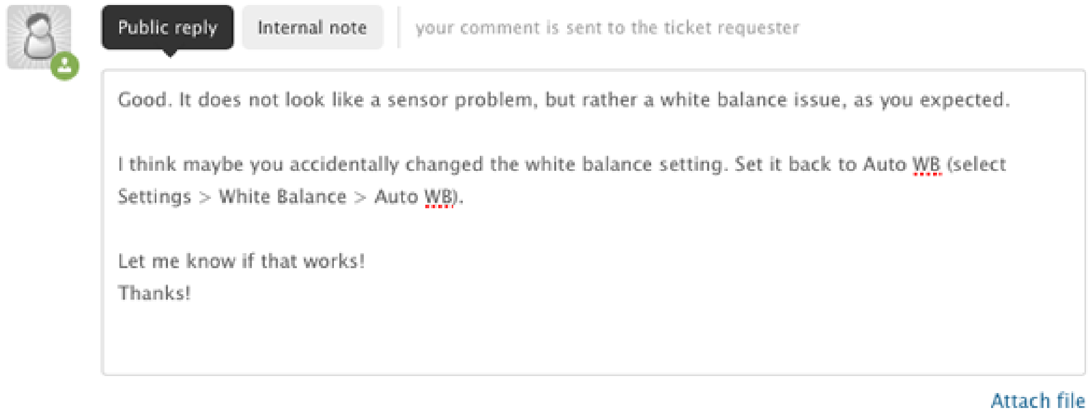
Now let's go back to Zendesk and take a look at the updated ticket.

Solving a ticket

Now that the customer has responded with more information, let's resolve our test ticket.

To solve the test ticket

1. Click the **Views** icon () in the sidebar, then select **Pending tickets** in the list of views.
2. Click the title of the test ticket to open it.
3. Review the customer comment.
4. Enter a comment in the **Public reply** box.



5. Click the arrow on the **Submit** button and select **Solved**.

You've solved your first ticket! The ticket status is **Submit as Solved**. The ticket status will automatically update to **Closed** after 4 days unless you or the customer update the ticket.

Note: This status change is controlled by something called an *automation*. An administrator can change the number or days it takes for a ticket to change from **Solved** to **Closed** (up to 30 days) by editing the **Close ticket 4 days after status is set to solved** automation.

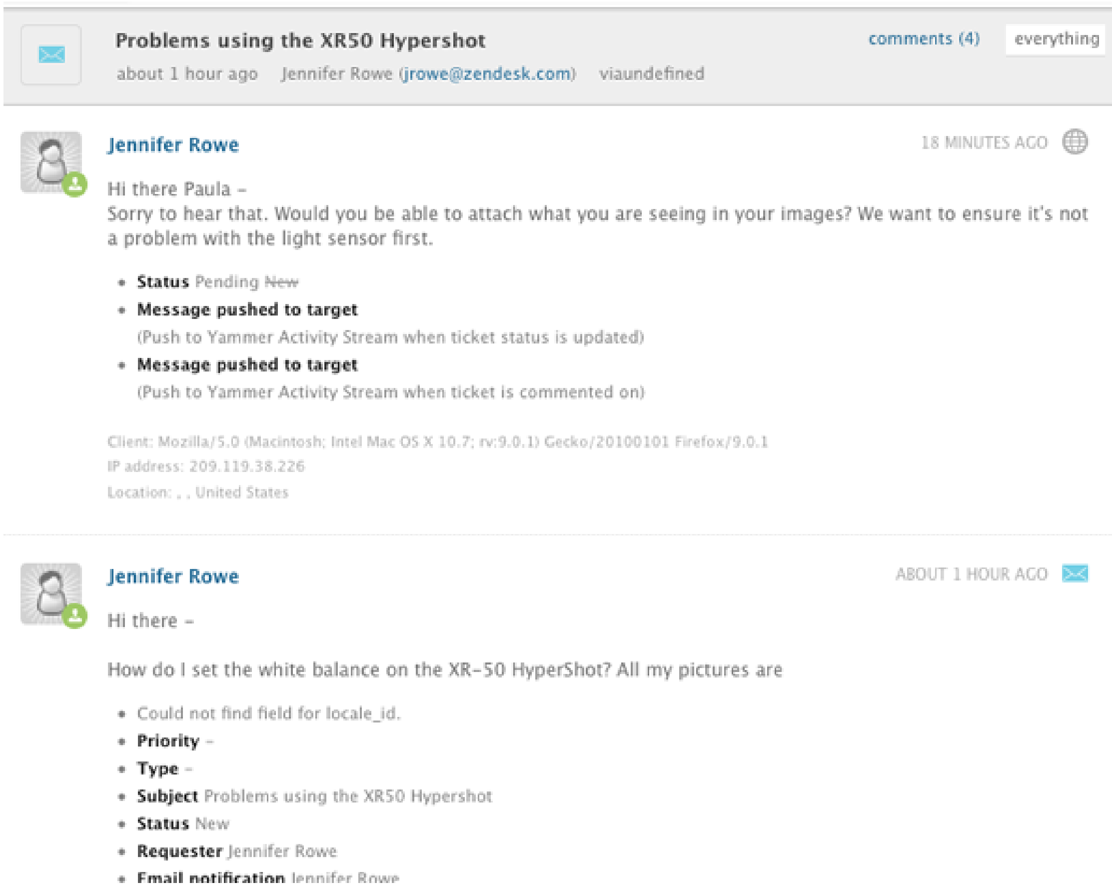
Reviewing a ticket's history

Zendesk keeps a history of all ticket activity, including automatic actions by automations and triggers, in the ticket history. Let's look at the history for the ticket you just solved.

To view the history of the test ticket

1. Hover over the **+add** tab in the top toolbar., then select the ticket title from the recently viewed tickets section.
2. When the ticket opens, click **Events** on the right above the comments area.
3. Scroll through the list of events to see the history of the ticket.

   Notice that events by automations and triggers are also recorded, including a notification email that was sent when you solved the ticket.



4. When you are finished, click **Comments** to show comments only.

Summary

In this lesson you sent a support request as a customer using email, then solved the ticket as an agent in Zendesk. This gave you an opportunity to see how email support requests become tickets and how you can easily update and manage tickets in your Zendesk.

Next Lesson: *Branding your Zendesk*

Chapter

2

Branding your Zendesk

In this lesson you'll brand your Zendesk for your company. We'll start with some easy changes to add your company colors and logo.

Then you'll learn how to customize the URL for your support Web portal so that it matches your company domain instead of the Zendesk domain. Finally, you'll learn how to configure your Zendesk to use your company email address.

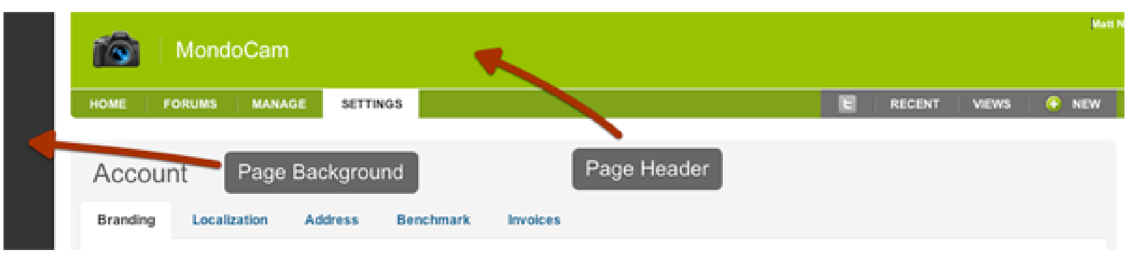
All these branding changes will help ensure that the support experience you provide your customers feels integrated with the rest of your customer experience.

Changing the logo and colors for your Zendesk

Zendesk enables you to change the colors and logo to make your Zendesk more integrated with the rest of your company website. These modifications are pretty easy to make.

Note: In the next section we'll discuss some advanced customization options you can make to use your company email address and URL.

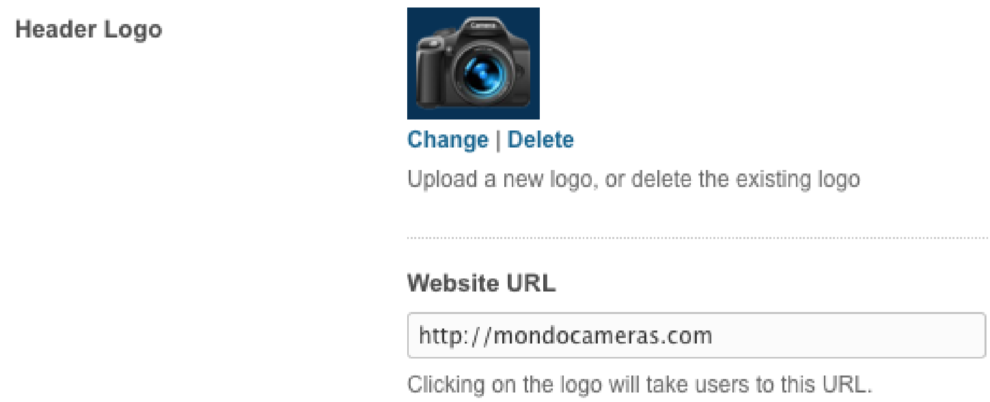
Let's make sure you understand which colors you are changing. The **Page Header** is the color at the top and the **Page background** is the color on the sides.



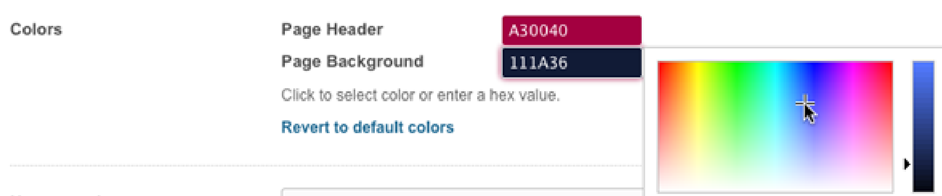
Now, before you start, make sure you have a version of your logo optimized to 254 pixels wide by 50 pixels tall. Zendesk will scale the image to fit that space if it is not already that size.

To change the colors and logo for your Zendesk

1. Click the **Manage** icon ( ) in the sidebar, then select **Account**.
2. Click the **Branding** tab.
3. In the **Header logo** section, click **Change**, then click the **Browse** button that appears.



4. Select your image. Remember, if your logo is not 254 pixels wide by 50 pixels tall Zendesk will scale it to fit in the header.
5. Back in the **Header logo** section in the **Branding** page, change the **Website URL** that the image links to your company website URL.
6. Now scroll down to the **Colors** section in the **Branding** page.
7. Click the color bar beside the **Page header** label.
8. In the color picker, select a color or enter the hex number for the color, then click off the color picker to close it.



9. Click the color bar beside the **Page background** label and select a color.
10. Click **Save tab** at the bottom.

    Check out your new logo and colors!

Now let's talk about how you can configure your Zendesk to use your company email address.

Using your company email address with Zendesk

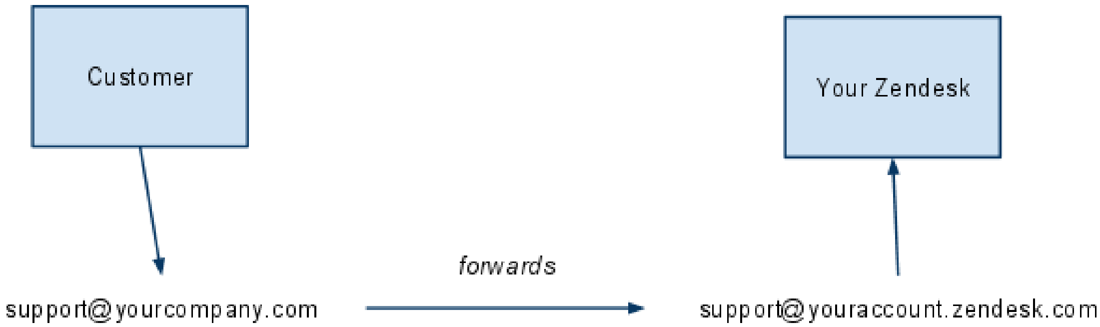
Your Zendesk currently uses a Zendesk email address. This will probably be confusing to your customers, so you might want to configure your Zendesk to use your company email address.

You can change the current email address (support.*youraccount*.zendesk.com) to your own email address (support@*yourcompany*.com). This will enable your customers to send email to and receive emails from an email address customized for your company.

Enabling customers to send support email to your company email address

If you want to enable customers to send support requests to your company email address, and you want to receive the tickets in your Zendesk, you need to set up email forwarding. Then you can receive support requests at external addresses and forward them to equivalent email addresses in your Zendesk account.

For example, you can forward email sent to support@*yourcompany*.com to your Zendesk email support@*youraccount*.zendesk.com.



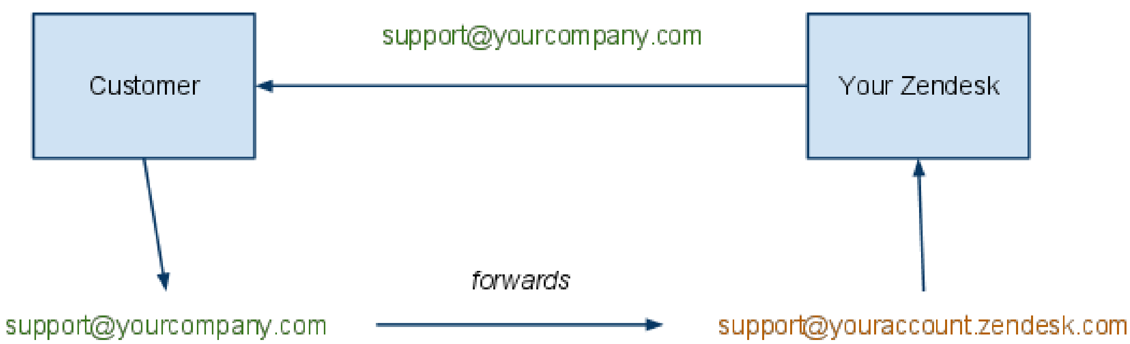
To receive support emails at your company email address, you need to configure email forwarding in your email server (for example, Google Apps, Microsoft Exchange server, or some other system), not in Zendesk. For more information, see *Using an external domain* in the Zendesk Administrator Guide.

Tip! If you use Gmail or another email platform that requires you to verify the email address to which you are forwarding, you may need to check your Zendesk **Suspended tickets** view for the verification email.

If you currently have an active support email address, you might not want to enable email forwarding for that email address until you are ready to start using Zendesk to manage your support requests.

Sending reply support emails from your company email address

In addition to receiving support requests at your company email addresses and then forwarding them to your Zendesk, you can also configure email to process reply emails to customers as if they are coming from your company email address and not a Zendesk email address.



Configuring Zendesk to send reply emails from your company email addresses requires two steps:

1. Create an SPF record to allow Zendesk to send email on behalf of your email server.

   In other words, outgoing mail will appear to be from help@*mycompany*.com, not support@*myaccount*.zendesk.com.
2. Update the default reply email address in the **Email Channel** settings page to your external support address (help@*mycompany*.com).

For complete details, see *Using an external domain* in the Zendesk Administrator Guide.

Changing your support URL to use your company domain name

You can make your Zendesk more integrated with your company website by removing *zendesk* from the support URL and using your own company domain name. For example, support.*yourcompany*.com instead of *yourcompany*.zendesk.com.

Setting this up can be technical. Essentially, where your domain name is registered, you need to create a subdomain and configure it so that when a user browses to that subdomain address, they are redirected to your Zendesk. A subdomain might be something like support.*yourwebsite*.com or help.*yourwebsite*.com, where *support* and *help* are the subdomains.

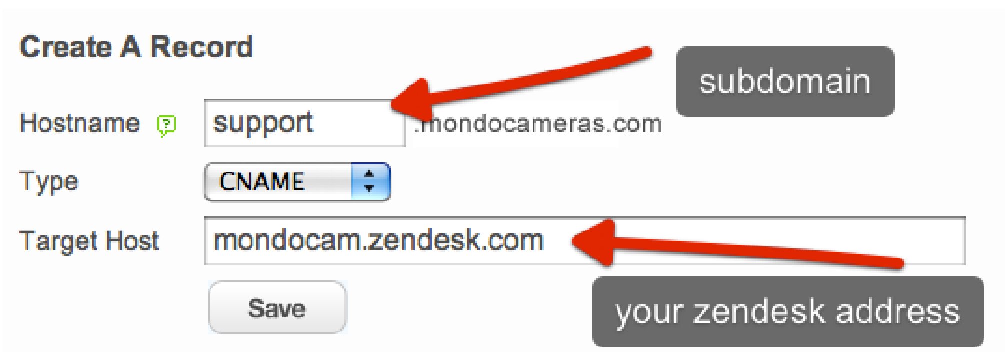
Let's take a high-level look at what's involved. The detailed steps will depend on your specific configuration.

Step 1: Setting up your subdomain

To set up your subdomain, you need to create a CNAME record within your DNS settings. Your domain registrar or your website administrator should be able to help you.

For more information, see *An example with Go Daddy* in the Zendesk support forums.

Be sure to point your subdomain (also called host name or alias) to your default Zendesk account URL (that is, the URL you got when you first created your Zendesk account).



Step 2: Configuring Zendesk to use your subdomain

After you set up your subdomain, you need to configure your Zendesk to use the subdomain.

Tip! Be sure that you create the CNAME record first. If that is not in place when you put your new URL in Zendesk you will not be able to get to your Zendesk. If this does happen, go to *youraccount*.zendesk.com/access/normal to access your Zendesk.

To use your subdomain

1. Click the **Manage** icon (⚙) in the sidebar, then select **Account**.
2. Click the **Branding** tab.
3. In the **Host mapping** field, enter the entire URL you created with your CNAME record.

4. Click **Save**.

After you complete steps 1 and 2, your Zendesk will use your company domain name.

Summary

In this lesson, you changed the logo and colors to brand your Zendesk. You also learned how to configure Zendesk to use your company email address and URL.

Next Lesson: *Customizing your Web portal*

Chapter

3

Customizing your Web portal

In this lesson, you'll get familiar with your support Web portal and learn how to view the Web portal from your customer's perspective. We'll customize the introductory text that welcomes your customers. Then we'll look at the two main ways your customers can get help through your Web portal: the support request web form and the forums.

The support request web form is available to end-users in your Web portal. This form is one way customers can submit support requests to you if they want to get direct help from your support team. These requests become tickets in your Zendesk.

The forums are also available to end-users in your Web portal. Forums are collections of topics that might include news and announcements, knowledge base articles, community questions and comments, and frequently asked questions (FAQs). Forums enable users to *self-serve*, by giving them information, and potentially answering their questions, before they contact your support team.

Now, let's start by taking a little tour of the Web portal.

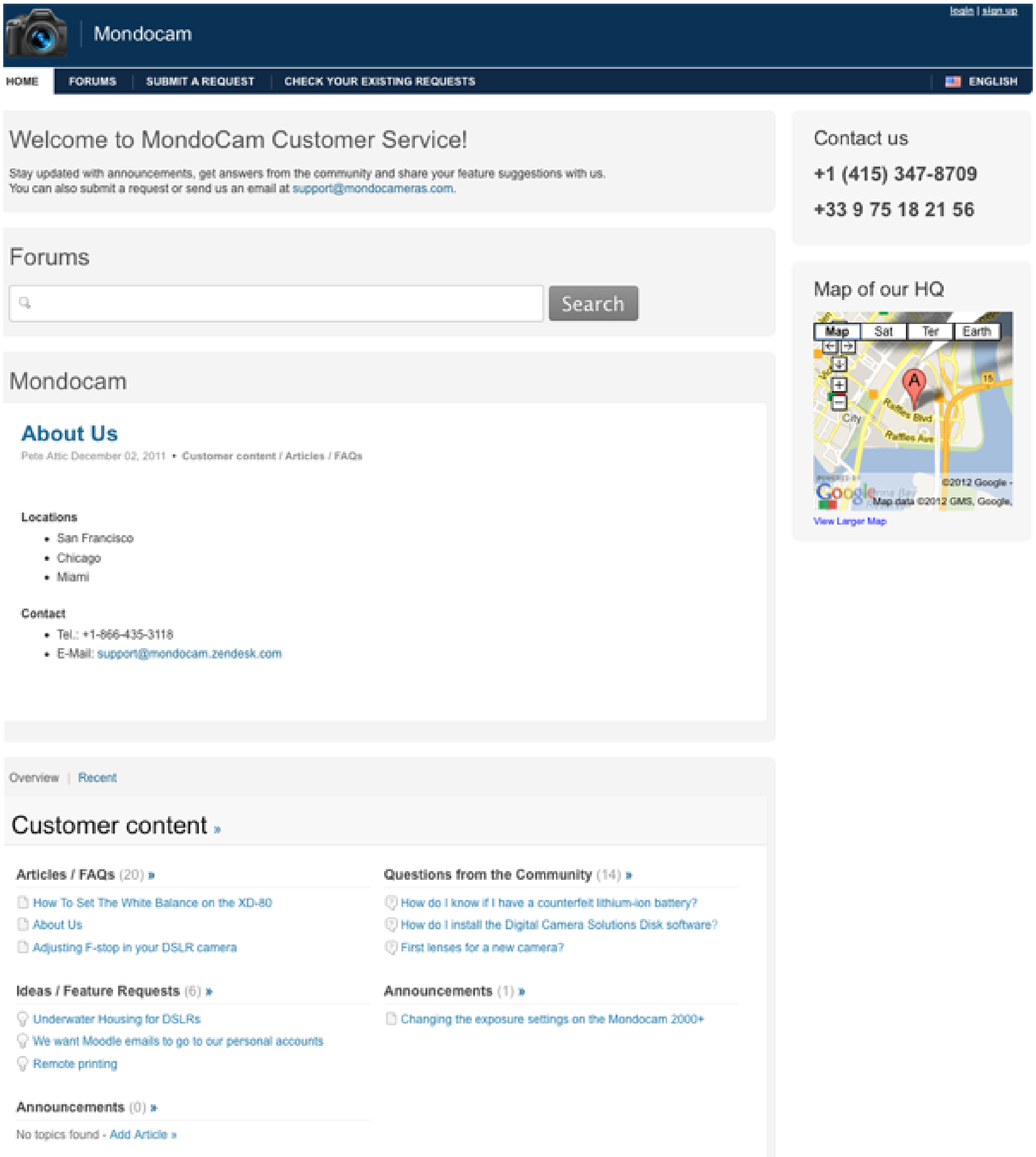
Getting familiar with your Zendesk Web portal

Web portal refers to the parts of the Zendesk that are available to end-users to submit tickets, track their support requests, and access your knowledge base and forums.

Note: If you just created your account, you will initially see the Getting Started page.

Let's take a look at the Web portal. There are five main areas:

- Header and menu bar
- Introductory text
- Highlighted forum articles
- The forums
- The sidebar



The header is the area at the top. The menu bar is below the header and includes the following user options:

- **Home** takes you to the Web portal.
- **Forums** takes you to your knowledge base and community support.
- **Submit a request** enables users to send a support requests to your Zendesk.
- **Check your existing requests** enables users to check the status of support requests they've submitted.

You can see your Web portal from a customer perspective when you are signed out. When you sign in to your Zendesk, you have more options that enable you to navigate and manage your Zendesk and tickets.

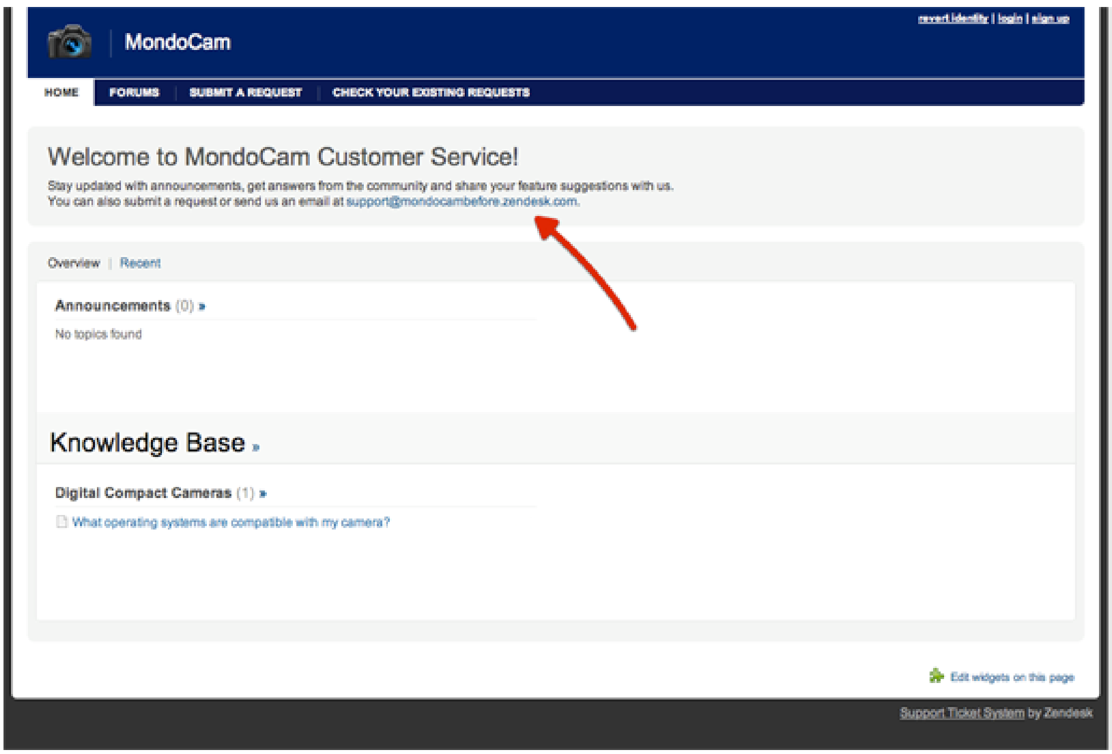
You can view your Web portal while you are signed. This enables you to see all of the content that end-users see, but you will not see the navigation tabs in the menu bar that an end-user sees. You might also see extra data about your tickets and forum activity that is not visible to end-users.

To view your Web portal when you are signed in

- Click your profile icon in the upper-right corner of the page header, then select **Go to web portal**.

Customizing the welcome text on your Web portal

The introductory text on your Web portal welcomes customers and can also give them information so they know how to get help with their support requests.

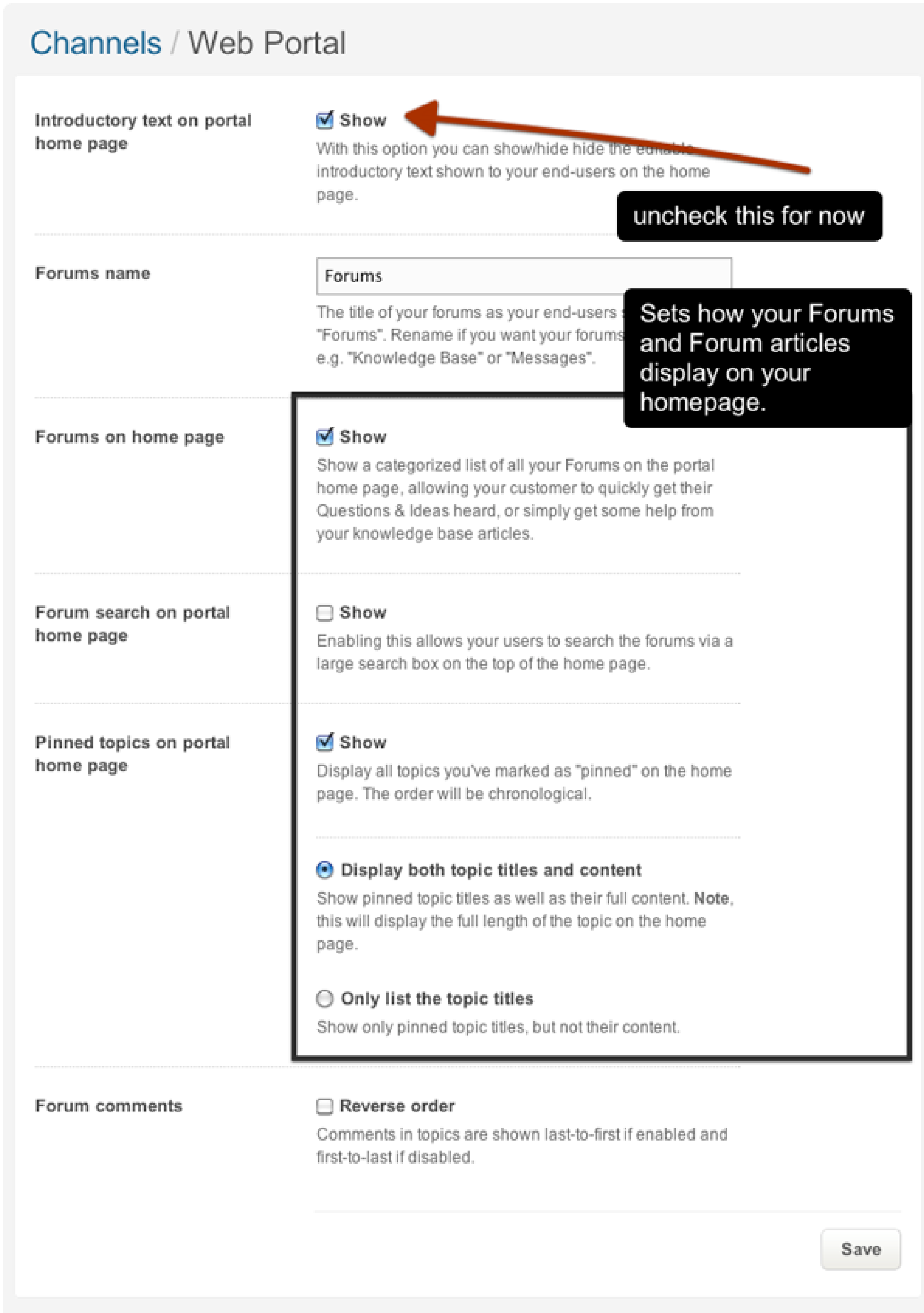


You can turn the text off, if you want, but more likely you'll want to tailor the welcome text for your customers. Let's turn the text off and back on, and then customize it for your customers.

Community tip! When you have the welcome text turned on and the forums search box turned on, the search appears below the welcome text by default. If you want to move the search box above the welcome text, *check out this code snippet* Nick Houldsworth shared in our community forums!

To hide or show introductory text on your Web portal

1. Click the **Manage** icon ( ) in the sidebar, then select **Channels**.
2. In the **Web portal** section, click **Edit**.
3. Deselect **Show** in the **Introductory text on portal home page** section.



The other settings on this page relate to your forums. We'll work on customizing your forums later.

4. Click **Save** at the bottom of the page.
5. Click **Home** in the menu bar to view your Web portal. Notice that the welcome text is gone.
6. Repeat these steps to show the welcome text again.

To modify introductory text on your Web portal

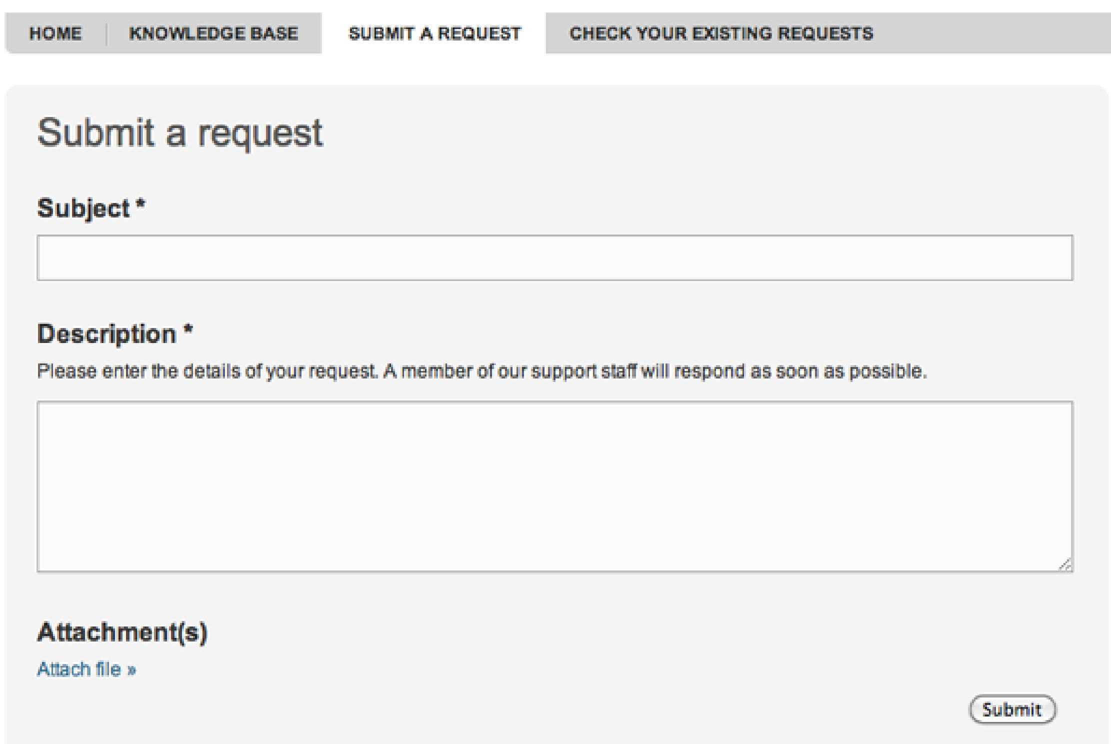
1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Click **Edit** to the right of the introductory text.
3. Edit the text with your own personal message.

   In addition to a welcome message you might want to give customers other information, such as contact methods and support options.
4. Click **Save** (below the text) when you are finished.
5. Click **Home** to view your Web portal. You now have a custom message to welcome your customers.

Now that you've customized your introductory text, let's customize your support request form.

Adding a custom field to your support request form

You can customize the form that customers complete when they click **Submit a Request** in your Web portal. This is one way customers contact your support team with support requests. These requests become tickets in your Zendesk.



To customize this form, you need to add custom fields to tickets. Any custom ticket fields you make visible to end-users appear on the support request form in your Web portal.

Custom fields are typically used to gather more information about the support issue or product or service. For example, you may want your customers to also select the model name and number of your product.

Let's add a custom field that asks the customer to categorize the type of issue they have: product, billing, order, technical, or other.

To add a custom field

1. Click the **Manage** icon () in the sidebar, then select **Ticket fields**.

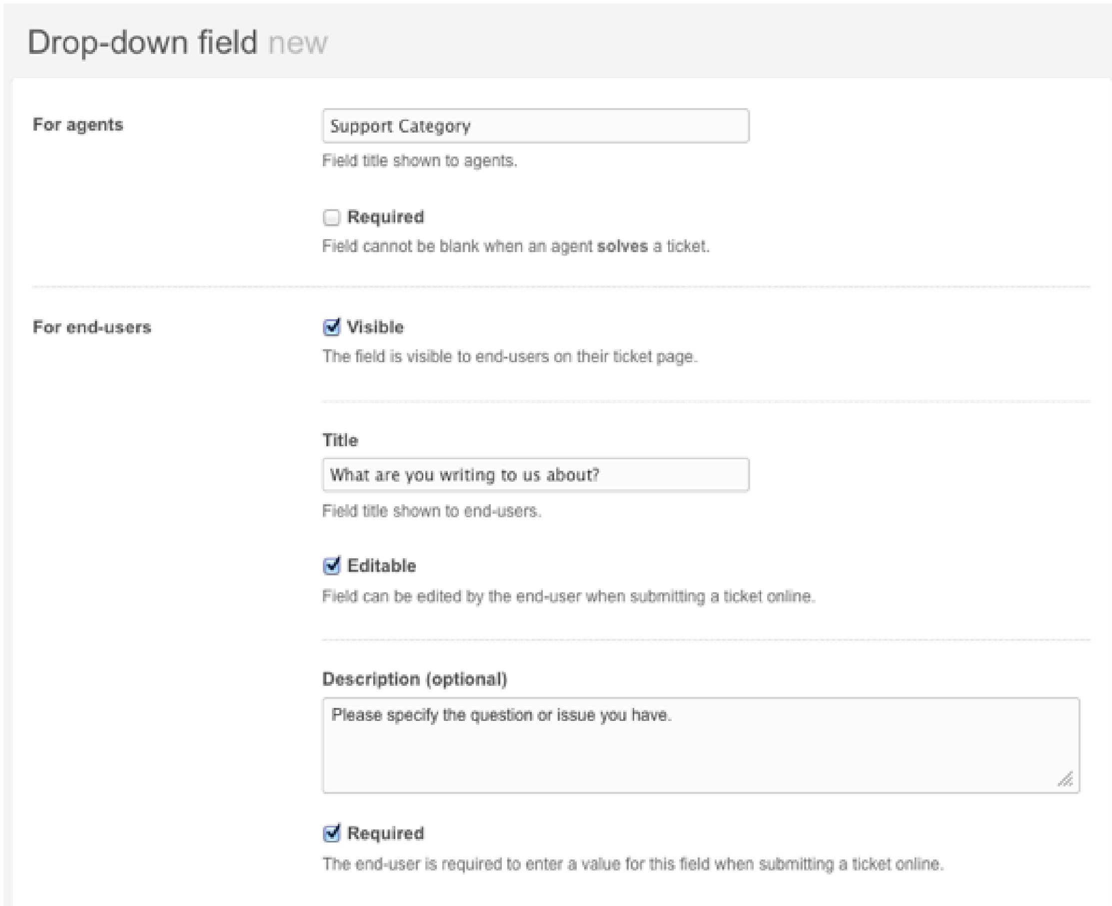
   This page shows all the ticket fields. Notice that there are more fields here than in your support request web form. As mentioned before, only the fields that are visible to end-users appear in the web form. All the other fields are visible to agents only. The **Subject** field, for example, is visible to end-users and agents, whereas, **Status** is visible to agents only.
2. Click **Add custom field** in the upper-right corner.
3. In the custom field page, click **Select** beside **Drop-down list**. (You might have to scroll to the right.)

   The type of field we're adding is a drop-down list.
4. In the **For agents** section, enter "Support Category" as the **Field title shown to agents**.

   This is the internal title agents will see when they view the ticket. This is not the title that customers will see in the support request form.
5. Click **Visible** in the **For end-users section**. A couple more options appear.
6. Enter a **Title**.

   This is the label that will appear beside the drop-down list in the support request form. In this case, enter "What are you writing us about?" because you are creating a drop-down list to categorize your support requests.
7. Select **Editable** so that end-users can edit this field.
8. In the **Description** field that appears, enter a description for your custom field.

   For example, enter "Please specify the question or issue you have."

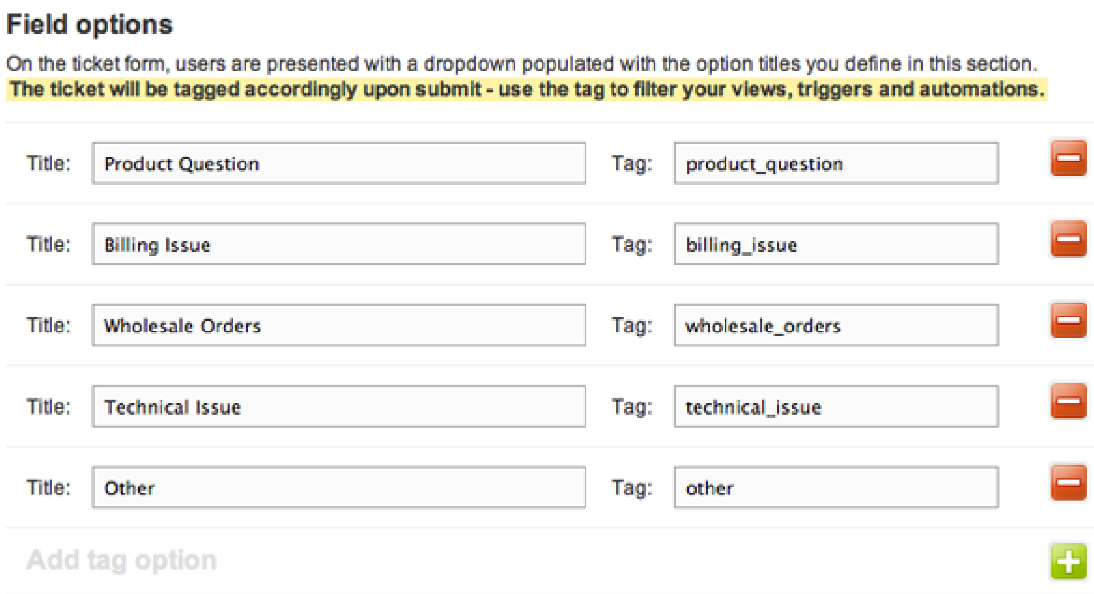


9. Now, in the **Field options** section, in **Title**, enter a value you want to appear in the drop-down list, then press Tab and the **Tag** field automatically completes.

   For this example, enter "Billing issue" as the title.

10. Click the **Plus** (+) to add another value and repeat this step until you've added all the values you want in the drop-down list.

    For this example, enter the values Product question, Wholesale orders, Technical issue, and "Other".



11. When you finish, click **Add field**.

Now that you've customized your support request form, let's start setting up your forums. Your forums give your customers an alternative to contacting your support team.

Customizing your forums

Forums are collections of topics that might include news and announcements, knowledge base articles, community questions and comments, and frequently asked questions (FAQs). You can have multiple forums on your Web portal.

Your forums give customers an opportunity to *self-serve*, by giving them information, and potentially answering their questions, before they contact your support team. The forums occupy a large portion of your Web portal. You can also access your forums by clicking **Forums** in the menu bar.

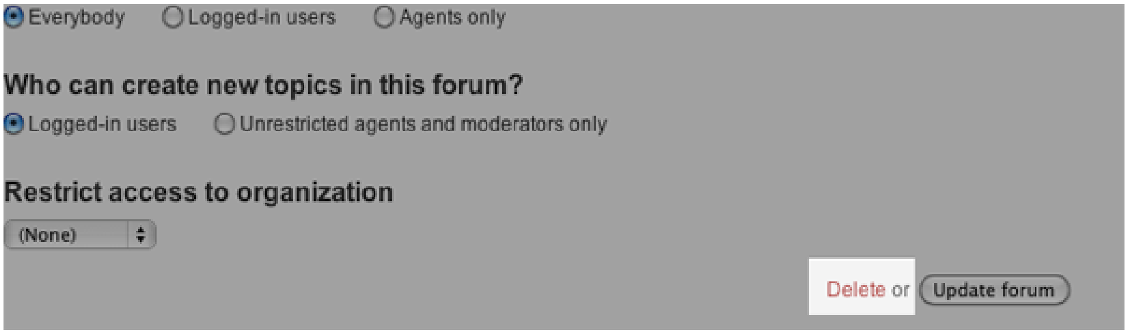
When you set up your Zendesk , there are already some forums set up for you: Announcements, Community Help, Tips & Tricks, Feature Requests, and Agents Only. You can use any or all of these. You can delete, add, and edit forums and forum categories. How you organize your forums content depends on your business and the amount and type of content you provide.

Removing and editing forums

Let's start customizing your forums by deleting one of the existing forums and changing the name of another one.

To remove an unused forum

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Click the title of the forum you want to remove (Community Help, for example).
3. When the forum opens, click **Edit** in the upper-right corner.
4. Scroll to the bottom of the page and click **Delete**.



5. Click **OK** in the confirmation box to delete the forum.

You can repeat the steps as needed to remove other forums. Let's keep the Agents Only forum, but let's change the name to Internal Docs.

To change the name of a forum

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Click the title of the forum you want to change (Agents Only, in this case).
3. When the forum opens, click **Edit** in the upper-right corner.
4. In **Forum title**, enter a new name (Internal Docs, for example).
5. In the **Role restrictions** section make sure **Agents only** is selected.

   This means that only agents can see this forum, not end-users.
6. Click **Update forum** at the bottom.

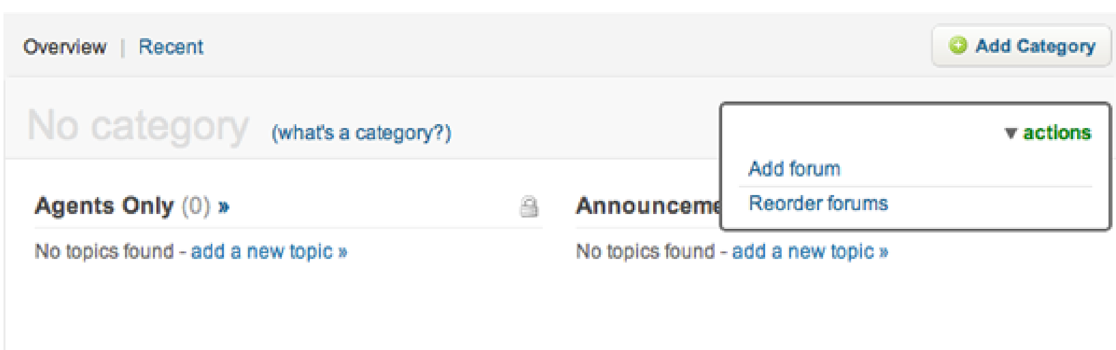
Now let's add a forum and create a topic in that forum.

Adding forums and forum topics

As mentioned earlier, you can have multiple forums in your Web portal. For example, you might want to create separate forums for each of your product lines. Let's add a forum.

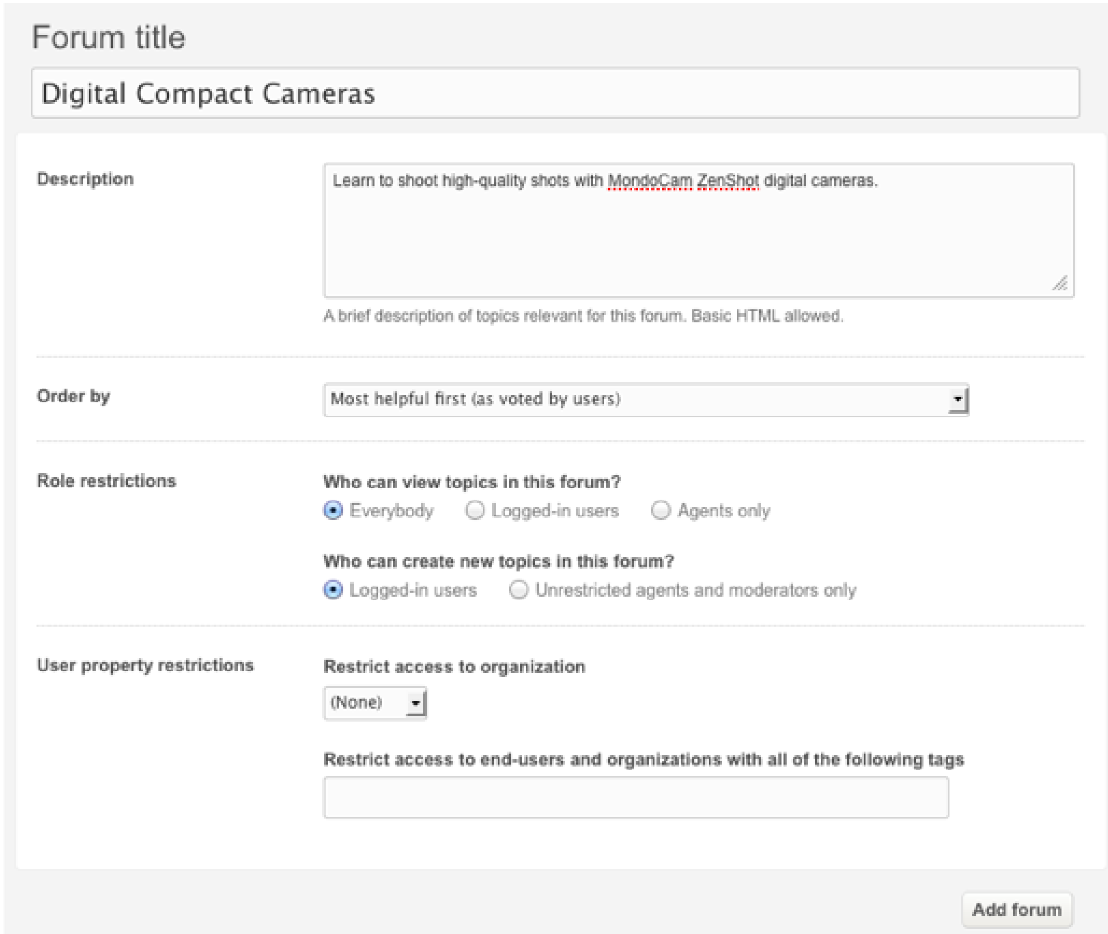
To add a forum

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Click the **Forums** tab.
3. Select **Actions > Add forum** just above your forums.



4. Enter a **Forum title**. In this case, let's enter the product type Digital Compact Cameras.
5. Enter a **Description**.

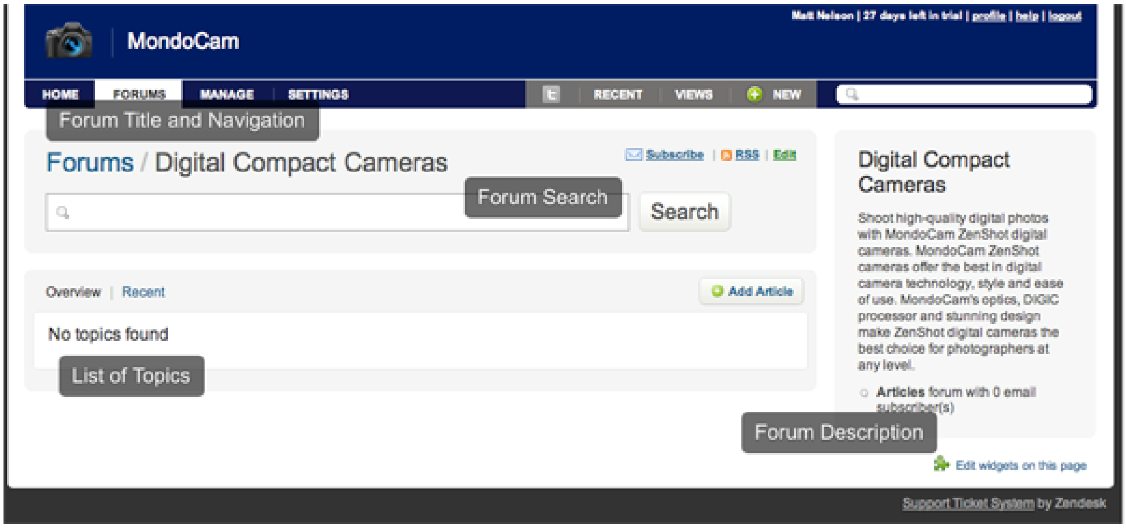
This description will be visible to users in the right column when the user is viewing this forum.



Those are the only options you need to complete for now. We'll talk about some of the other options later.

6. Click **Add forum** at the bottom.

   Your new forum opens. The forum title is at the top and the forum description is in the right column. The search field enables users to search content in this forum (when you add content!). Forum topics will appear in the main area.



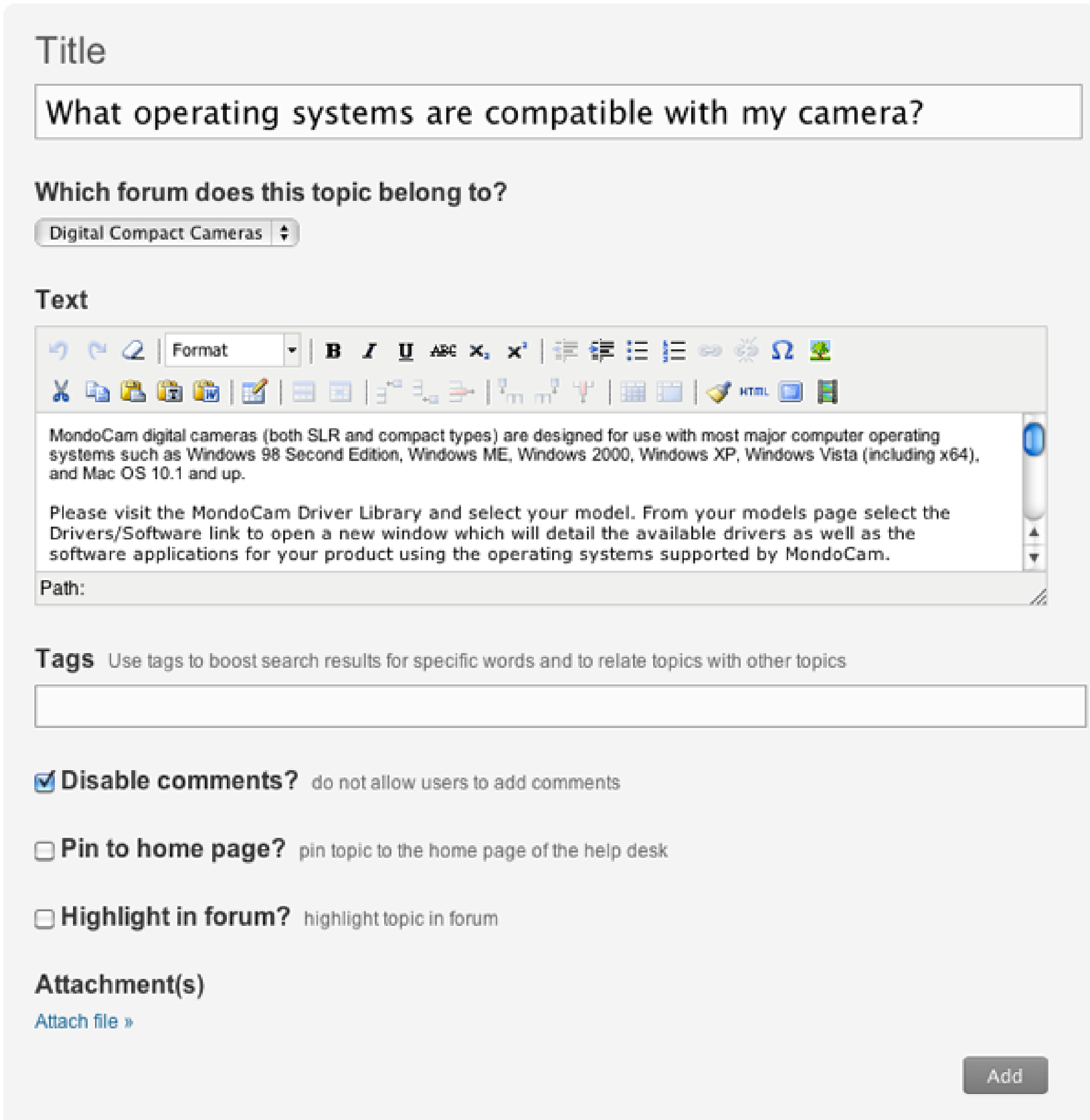
7. Click **Home** to view your Web portal and see the new forum.

Now let's add an article to our new forum.

To add a forum article

1. In the Digital Compact Cameras forum you just created, click the **Add article** button.
2. Enter an article title.
3. Enter the body content. You can write new content or you can copy and paste existing content.
4. Select **Disable comments** so that users cannot comment on this topic.

   For this example we want customers to submit tickets with questions instead of posting them as comments.



5. Click **Add** at the bottom.

   Your new forum topic opens for you. You can edit the topic anytime by clicking the **Edit** link in the upper right of the article.

Now, let's organize your forums a bit more by adding categories.

Creating a forum category

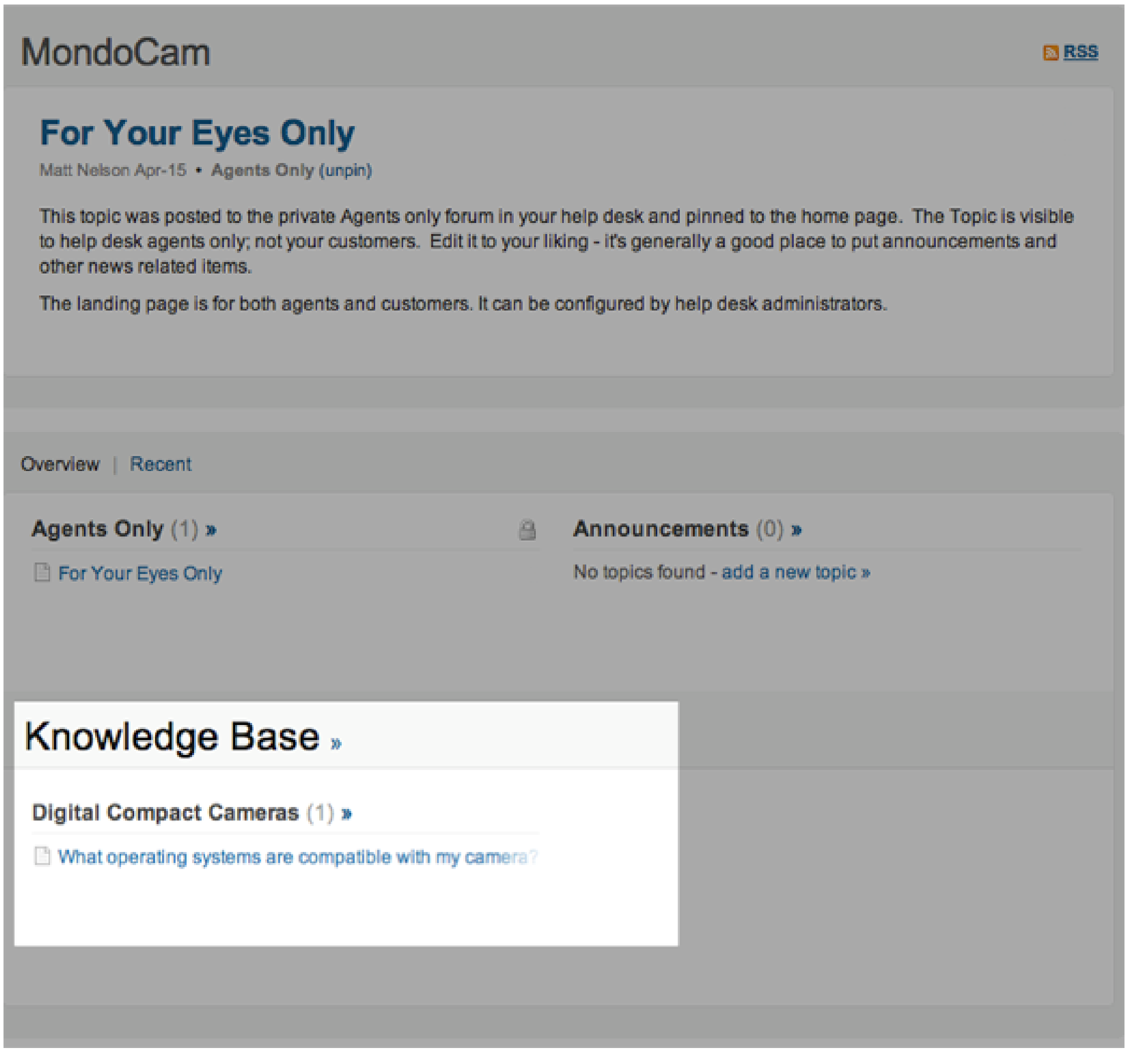
Depending on the size of your business and the amount of content you have, forums can be organized into categories. You can have multiple categories in your Web portal, with multiple forums in each category.

Let's create a category called Knowledge Base and move our new forum into it. Creating a forum category is similar to creating a forum.

To create a forum category

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Click the **Forums** tab.
3. Click **Add category** on the upper-right side.
4. Enter a category title. In this case, enter Knowledge Base.

   The title will be visible as a heading in your forums.

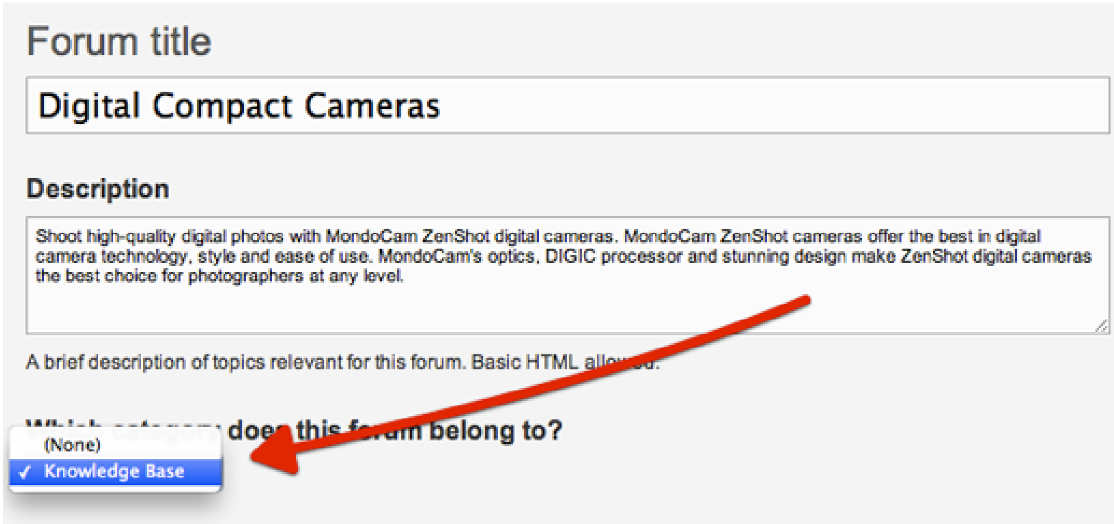


5. Enter a category description.
6. Click **Add category** at the bottom.
7. Click **Home** to view your Web portal to see your new category.

Now, let's move the forum we created to our new category.

To move a forum to another category

1. In your forums, click the title of the forum you want to move. In this case, click the Digital Compact Cameras forum you just created.
2. Click **Edit** in the upper-right corner.
3. In the **Category** section, select the Knowledge Base category you just created from the drop-down menu.

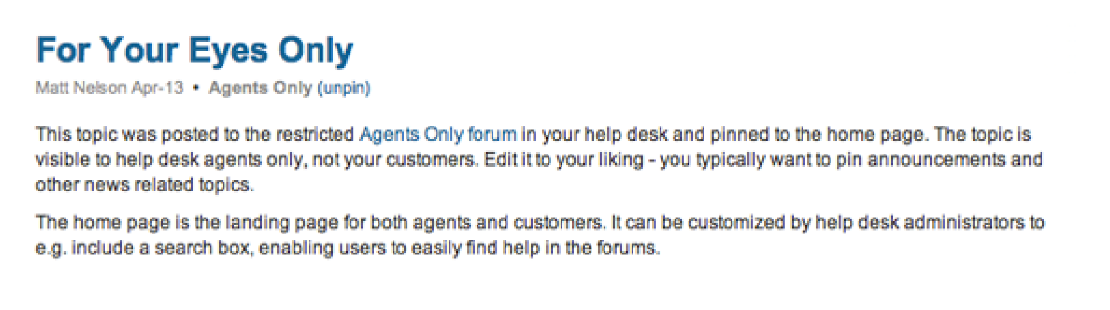


4. Click **Update forum** at the bottom.
5. Click **Home** to view your Web portal and see that the forum has moved to the new category.

Now, let's decide which forum topics you want to appear on your Web portal home page.

Pinning forum topics to your Web portal

Earlier we customized the welcome message and the forums. There's one more item on the Web portal we haven't looked at yet: the topic titled "For Your Eyes Only".



This forum topic is part of a forum that is visible to your agents only, not your customers. And this topic is locked (or *pinned*) to the Web portal. So, how do you control what is shown on and who can view it?

For each forum you can indicate who can view that forum. This enables you to control what content people see. For example, you can make an internal forum for topics about product bugs and workarounds. Or you can create an internal forum with pricing and product release information. The viewing permission you set applies to the entire forum, not individual topics in the forum.

You can also indicate which topics you want to appear on the Web portal on a topic-by-topic basis (up to three topics for each forum). This is called pinning a topic. For example, you might want to display the three most recent topics. Or you might want to display an important release announcement until the release date.

To set viewing permission for a forum

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Click the title of the forum you want to modify.
3. Click **Edit** in the upper-right corner.
4. In the **Role restrictions** section, click **Agents only** to make the forum available to agents only.
5. Click **Update forum** at the bottom.
6. Click **Home** to view your Web portal; log out to make sure the forum isn't visible to end-users.

To pin a forum topic to your Web portal home page

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Navigate to the forum article you want to pin.
3. Click **Edit** in the upper-right corner.
4. Select **Pin to home page**.
5. Click **Update**.
6. Click **Home** to see that the forum topic is there.

To unpin a forum topic on your Web portal home page

1. Click your user icon in the upper-right corner of the page header, then select **Go to web portal**.
2. Locate the forum topic on the page and click **Unpin** under the topic title.

   The forum topic disappears from your Web portal but the topic is not deleted. It's still part of your forums.

Summary

In this lesson you customized your Web portal. First, you modified the welcome message. Then you turned your attention to the two main ways your customers can get help through your Web portal: the support request web form and the forums.

You customized your support request web form and you set up your forums. Finally, you decided which content should appear on your Web portal.

Next Lesson: *Working with views*

Chapter
4

Working with views

In this lesson you'll learn how you can use *views* in your Zendesk to organize your tickets.

Views define a collection of tickets based on a set of criteria that convey various ticket states such as open and unassigned, pending (awaiting response from the requester), and unsolved. Zendesk provides some pre-defined, editable views. You can also customize your own.

Views are essential for managing the ticket workflow because they allow you to create meaningful groupings of tickets as they come in to tyour Zendesk and as they are managed through to resolution.

We'll start by editing one of the pre-defined Zendesk views to show which unsolved tickets are open (require our attention) and which are pending (require information from the customer). Then we'll deactivate some of the Zendesk views.

Selecting views

There are a pre-defined set of views for the essential day-to-day running of your Zendesk. These include:

- My unsolved tickets
- Unassigned tickets
- All unsolved tickets
- Recently updated tickets
- Unsolved tickets in your groups
- New tickets in your groups
- Pending tickets
- Recently solved tickets

You can use these views, along with any that you create, to manage and view your support tickets.

To see all of your views, click the **Views** icon () in the sidebar.

Let's use a view to open an unsolved ticket.

To select the unsolved tickets view

1. Click the **Views** icon () in the sidebar.

   The first 12 of your *shared* views and 8 of your *personal* views appear in the list. Administrators create shared views for all agents to use or for a specific group of agents. Agents create their own (personal) views.
2. Click **My unsolved tickets** from the list of views to see the tickets in that view.

   A list of all your unsolved tickets appears.
3. Open the test ticket from Zendesk titled "Welcome to Zendesk."

The ticket details appear.

That's it. You used a view to open a ticket!

Important If you only have one ticket in your **My unsolved tickets** view, go ahead and create another test ticket. You need more than one ticket in this view to complete the rest of the lesson. If you already have more than one ticket in this view, you're ready to continue!

Now let's edit one of the pre-defined Zendesk views to make it more useful to you.

Removing unused views

The pre-defined Zendesk views are based on customer service best practices. You can see the list of views when you click the **Views** icon () in the sidebar.

You don't have to use all of these views, if you don't want to. You can remove any unused views so they don't clutter your list of views. And you can always add views back to the list, as needed. When you remove a view, you don't actually delete the view; you deactivate it is so that it doesn't appear in the list.

Let's remove the two views that involve groups because you haven't set up groups yet.

To remove an unused view

1. Click the **Manage** icon () in the sidebar, then select **Views**.
2. Position your mouse over the **New tickets in your groups** view, then click the **Deactivate** link that appears to the right. (You might have to scroll to the right to see the deactivate option.)

   The view moves to the **Inactive views** section at the bottom.
3. Now position your mouse over the **Unsolved tickets in your groups** view, then click the **Deactivate** link that appears to the right.

   At any time you can reactivate a view by clicking the **Activate** link to the right.
4. When you are finished, click the **Views** icon () in the sidebar to see that the two views you deactivated have been removed from the list.

Let's keep the remaining views in the list:

- My unsolved tickets
- Unassigned tickets
- All unsolved tickets
- Recently updated tickets
- Pending tickets
- Recently solved tickets

Notice the **Unassigned tickets** view. All tickets in Zendesk must eventually be assigned to a support agent. But when new tickets come in, they are unassigned (unless you are the only agent in your Zendesk or you have set up rules to automatically assign tickets) and you can find them in the **Unassigned tickets** view. We'll discuss ticket assignment more in the next lesson.

Summary

In this lesson, you learned about using views to manage tickets in your Zendesk. You edited an existing view and you deactivated two views.

Next Lesson: *Assigning tickets to agents*

Chapter
5

Assigning tickets to agents

In this lesson we'll briefly review the different types of users. Then you'll start building your support team by adding an agent to your Zendesk.

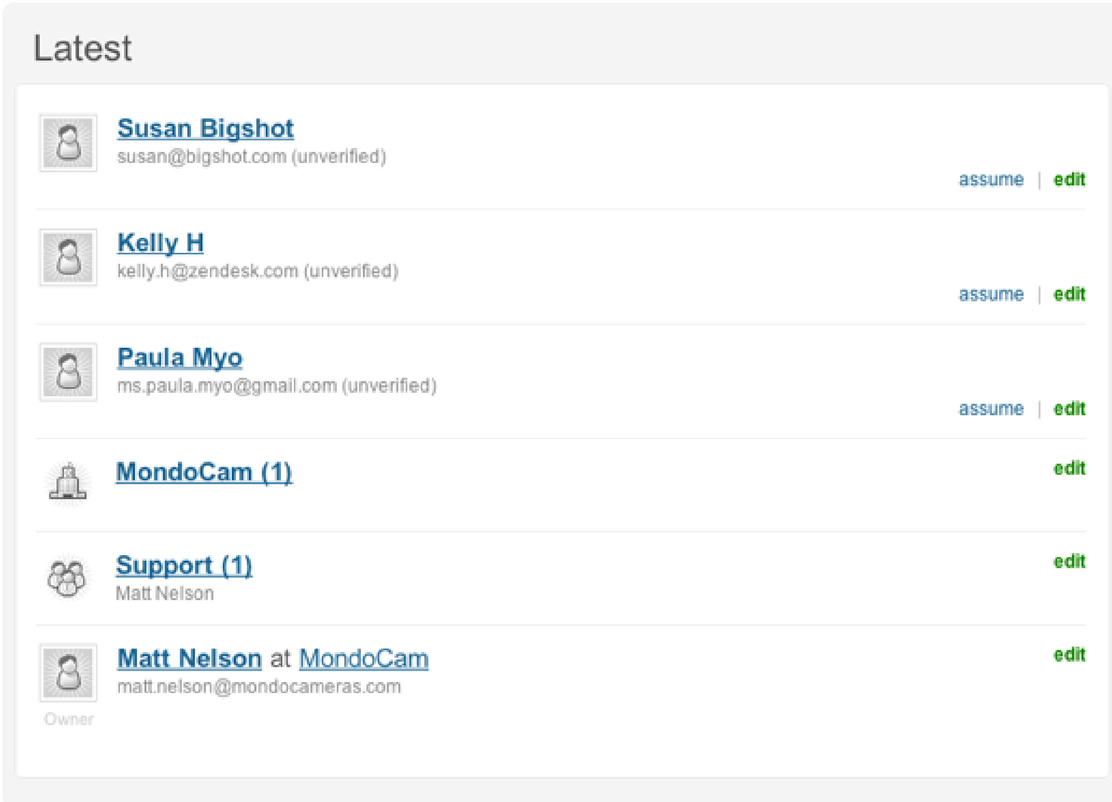
We'll also talk about how to manage your tickets—specifically, how to assign tickets to agents on your support team. Each ticket within Zendesk has to be assigned to someone. Finally, we'll talk about how you can automate some of the ticket assignment process. To do so, you'll create something called a trigger to automatically assign tickets based on the type of question or problem the user has.

Now, let's get started by talking about the different users in your Zendesk.

The types of user roles in Zendesk

Your Zendesk defines a number of user roles that are key to managing the people who generate support requests, those who resolve them, and the tickets themselves.

You can see all of your users in the **People** page. Users and people are essentially equivalent terms; it's the broadest definition for all people who use your Zendesk. In the **People** page you add new users, define their roles and privileges, and then organize them using groups and organizations.



Notice the **People** page uses different icons to represent the different user types. The user types include:

- **End-user** or **Customer** These people generate support requests from any of the available support channels (Web portal, email, Twitter, etc.). They don't have access to any of the administrator and agent features. They can only submit and track tickets and communicate with agents. You can add end-users manually, but in most cases they are added automatically when the user sends a support request.
- **Agent** These people run your day-to-day support. They are assigned tickets and interact with customers as needed to resolve support issues. The agent's role and privileges are defined by administrators.
- **Administrator** These people are agents with additional privileges to set up, manage, and customize your Zendesk. Administrators also design and implement the ticket workflow. Where an agent's primary function is to interact with end-users and resolve support requests, administrators may do that as well as set up and manage the workflow.
- **Account owner** This is the owner of the account and a special type of administrator. The account name is associated with this person's name, usually the person who created the account. There can only be one account owner; however, account ownership can be reassigned by the account owner to another administrator if needed. The account owner has access to areas that other administrators do not, such as invoicing, payment options, and benchmarking for the account.

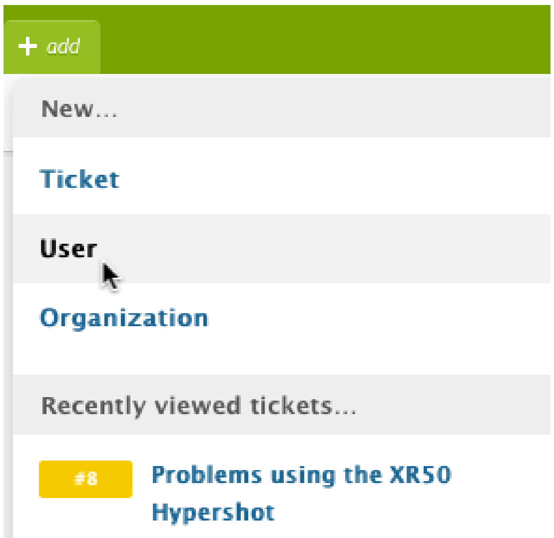
Each user has different privileges depending on their role and job function. For more information user roles, see *Understanding Zendesk user roles*.

Adding support agents

Now it's time to add an agent to your Zendesk. Remember, an agent's primary function is to interact with end-users and resolve support requests.

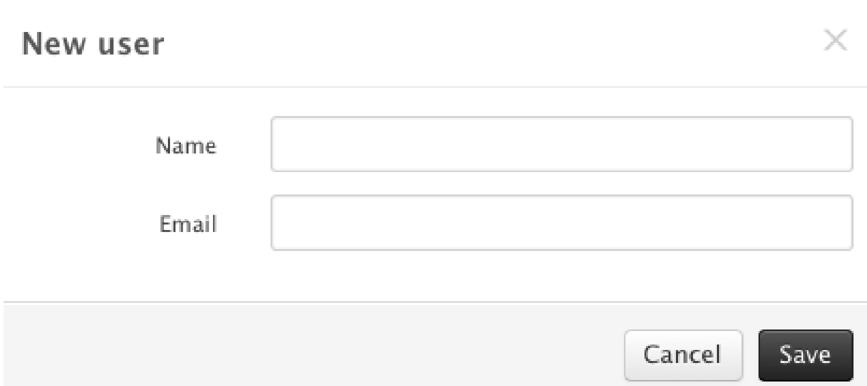
To add an agent

1. Hover over the **+add** tab in the top toolbar, then select **User**.

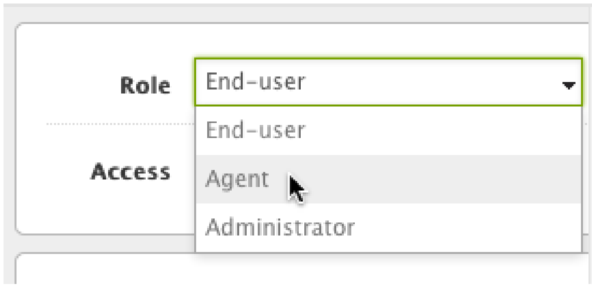


2. Enter the agent's **Name** and **Email**, then click **Save**.

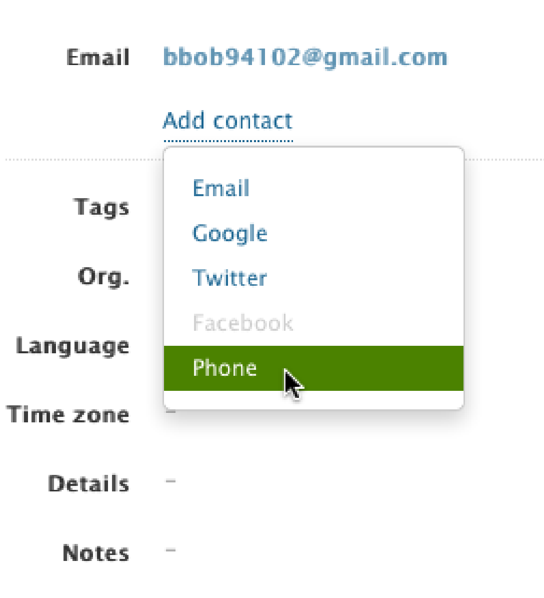
   Tip! Consider creating a test agent account instead of adding a real agent now. It might be helpful to add a test user in each role for set up and testing purposes. If you do set up test users, use names like Johnny End-User and Mary Agent so they are easily recognizable as test accounts.



3. The new user is added. The user receives a welcome email and verification link to sign in for the first time and choose a password. Now let's make the new user an agent.
4. In the new user's profile, change the **Role** to **Agent** and notice the options in the top section of the profile change. Let's ignore those options for now.



5. In the next section of the profile, click **Add a contact,** then select **Phone**.



6. Enter a phone number for the agent.
7. Enter other information if you'd like, or leave it blank for now.

All of the agent's profile information is automatically saved as you enter it, so when you finish updating the profile, you can simply navigate away.

Tip! You can add users manually or you can do a bulk import of users. For more information, see the section on *Bulk importing users and organizations* in the Zendesk User's guide.

Manually assigning tickets to agents

One common ticket workflow you'll want to set up early is how tickets get assigned. In Zendesk, each ticket must eventually have someone assigned to it. That way someone takes ownership of the support request.

When you were the only agent, all tickets were automatically assigned to you. Now that you have added another agent, you must assign the tickets. Incoming tickets are in waiting in the **Unassigned tickets** view.

Let's create a new test ticket. Instead of submitting the ticket through email, this time pretend you are on the phone with a customer and create the new ticket manually. Imagine the customer has a billing issue and you want to assign the ticket to your new agent, who is your billing expert.

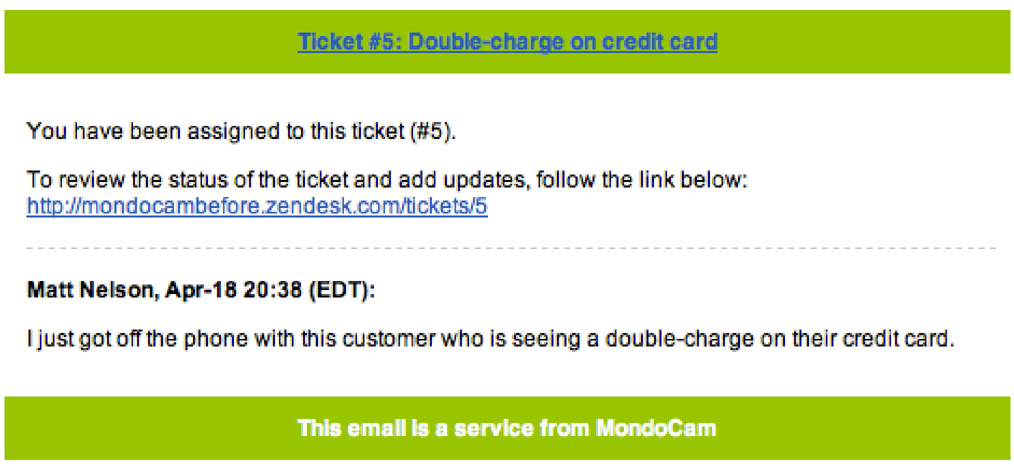
To create a test ticket to assign to an agent

1. Click the **+add** tab in the top toolbar,
2. Enter a **Subject** for the ticket. For example, "Double charge on credit card."
3. Add a **Description** about the caller's billing issue. For example, "This customer has a double-charge on their credit card for their order."
4. In the ticket properties panel, enter a **Requester** name.

   As you enter a name, matching users in your Zendesk are displayed so that you can choose one. If the user is not in your Zendesk, you can click the **New** icon (+) in the sidebar, then select **User** to add the user. After you add the user, click the **New Ticket** tab to return the ticket you were working on.
5. In the ticket properties panel, you can select an **Assignee** by typing a name or using the arrow to browse to a name.

   In this case, enter the name of the new agent you added in the previous section.
6. Change the **Type** to **Incident** and set the **Priority** as **High**.
7. Click **Submit as New**.

The new ticket is created. Zendesk automatically sends the assigned agent an email notification.



The agent can either follow the link in the email or respond directly to the email.

In addition to assigning tickets manually, as they are created or as they come in, you can set up a trigger to automatically assign agents based on certain ticket criteria. Let's try that now.

Automatically assigning tickets to agents

Now that you know how to manually assign tickets, let's make the process more efficient by automating some of it.

To automatically assign tickets, you need to create a *trigger*. Triggers are business rules you define that run immediately after tickets are created or updated. For example, a trigger can be used to notify the customer when a ticket has been opened. In this case, you'll create a trigger to automatically assign tickets about billing issues to a specific agent.

Triggers contain *conditions* and *actions*. You combine these to create 'if' and 'then' statements (*if* the ticket contains a certain set of conditions *then* the actions make the desired updates to the ticket).

You build condition and action statements using ticket properties, field operators, and the ticket property values. Only administrators can create and manage triggers.

Let's create a trigger that will automatically assign billing issues to a specific agent.

Creating a trigger

To build our trigger, we'll use the tag that was created when you added the custom web form field in *Customizing your Web portal*. If you didn't complete that lesson, you can do so now, or you can base your trigger on an item that already exists in the ticket.

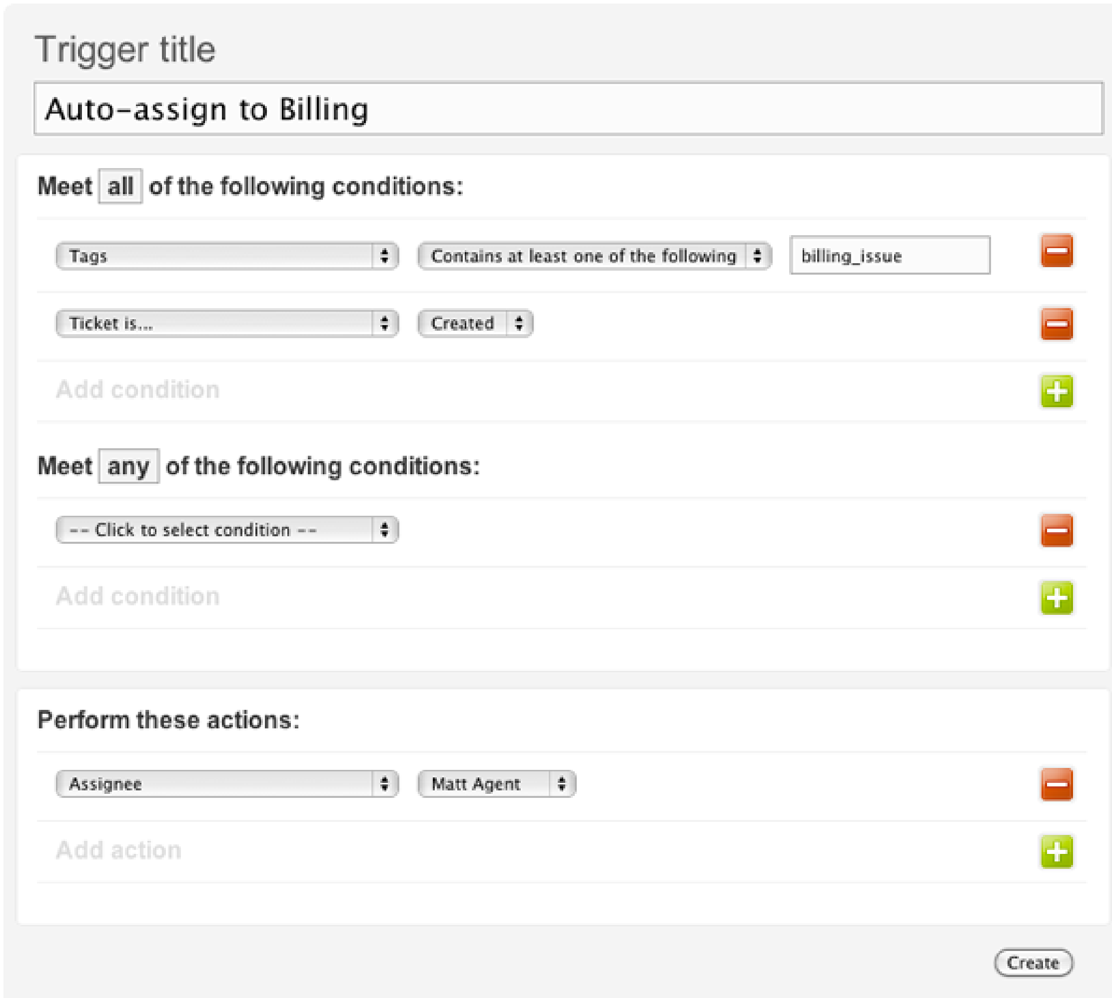
This trigger will identify any tickets with the billing tag (which is based on the custom field) and assign them to a specific agent (the one you just added) who specializes in billing issues.

To add a trigger

1. Click the **Manage** icon (⚙) in the sidebar, then select **Triggers**.
2. Click **Add Trigger**.
3. Enter a **Trigger title** for your trigger. For example, "Auto-assign to Billing."
4. Under **Meet all of the following conditions** select **Tags**.

   Two more fields appear. Leave the middle field set to **Contains at least one of the following**.
5. In the last field, enter a tag. For example, "billing_issue."
6. Click the **Plus** (+) to add another condition.
7. Select **Ticket is** in the first field, then select **Created** in the second field.

   This is important. A ticket can only be created once, but it can be updated many times. You want this trigger to run only when the ticket is created.
8. In the **Perform these actions** section, select **Assignee**, then choose the billing specialist agent you added earlier.



9. Click **Create Trigger** to create your new trigger.

Your new trigger is added to the end of the list of triggers. Now anytime a web form is submitted with the billing tag, it will automatically be assigned to your billing agent.

Now you'd probably like to make sure that your billing agent is notified when a ticket is assigned. Remember that Zendesk comes with a pre-defined trigger called **Notify assignee of assignment**. This trigger sends email to the assignee when a ticket assignment is made, so you don't need to create your own trigger to do this.

Triggers can work together; one trigger can trigger another. In this case, you created the **Auto-assign to billing** trigger that assigns billing tickets to a particular agent. As soon as that trigger executes, making an assignment, you want the **Notify assignee of assignment** trigger to execute and send the notification email to the assignee. But triggers execute according to how they are ordered in the triggers list, so it's important to make sure you have them in the right order.

Let's look now at how you can reorder triggers to make sure they fire in the right order.

Ordering triggers

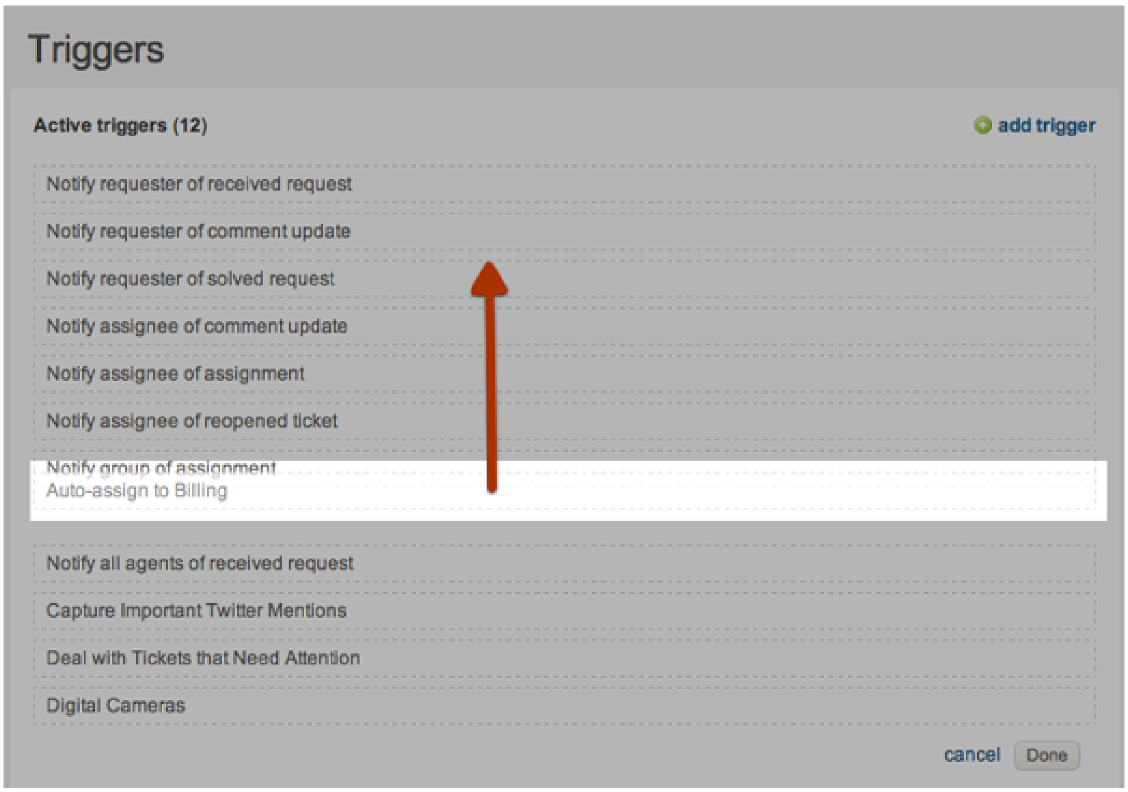
When a ticket is created or updated, Zendesk runs through all the triggers in order. So it's important to make sure your triggers are in the right order.

In our example, we want the **Auto-assign to billing** trigger we created trigger to execute before the **Notify assignee of assignment** trigger. This will ensure that when a customer submits a billing issue ticket, it will first be assigned to the billing agent, and then notification email will be sent to the assigned agent.

New triggers are added to the bottom of the triggers list. Let's move the **Auto-assign to billing** trigger from the bottom so that it is above the **Notify assignee of assignment** trigger.

To reorder triggers

1. Click the **Manage** icon ( ) in the sidebar, then select **Triggers**, if you are not already in the **Triggers** page.
2. Click **Reorder** at the bottom of the list of active triggers.
3. Click the **Auto-assign to billing** trigger and drag it above the **Notify assignee of assignment** trigger.



4. Click **Done**.

That's it. Now these two triggers will execute in the right order. Remember to check the trigger order every time you add a trigger. And it's a good practice to test your triggers after you create them.

Finding unassigned tickets

Unless you create triggers to automatically assign all your tickets, you will have tickets in your **Unassigned tickets** view. This view contains all unassigned tickets, including those created automatically through channels such as email and Twitter. In Zendesk, each ticket must eventually have someone assigned to it.

You'll need to define a workflow for how tickets are assigned in your Zendesk. This will probably depend on the number of agents you have and the volume of tickets you receive.

You can implement a manual assignment workflow (you might have agents go through unassigned tickets and self-assign or you might have one or more people triage the list and assign agents.) an automatic assignment workflow (you might set up triggers to make assignments like we did in the previous section), or a mix of manual and automatic.

Figure out what makes sense for your Zendesk. And if you are doing manual assignments, don't forget to make sure someone is responsible for checking the **Unassigned tickets** view on a regular basis!

Conclusion

In this lesson we reviewed the types of users in Zendesk. Then you added a new user, an agent, to your Zendesk.

Next we talked about assigning tickets. You manually assigned a ticket, first, then you set up a trigger to automatically assign certain tickets to you new agent. You learned how triggers work and the importance of the order of triggers. Finally, we talked about where to find unassigned tickets.

If you've completed all the Getting Started lessons, check out the next section for more information about *where to go next*.

Chapter 6

Where to go next

There are a number of resources to help you set up and use Zendesk. And you can contact support if you have specific issues or questions.

General resources

These are the best resources to learn about setting up and using Zendesk:

- *Using Zendesk* is the definitive documentation on all the Zendesk features.
- *Zendesk webinars* are live demonstrations and question and answer sessions about using Zendesk and its features.
- *Zendesk support forums* contain comments, questions, and active discussions about Zendesk best practices and features.

Specific resources

Here are some resources on specific topics that might be of interest to you after you get started. Topics include streamlining your workflow, gaining business insight with reporting, and extending your help desk with integrations.

- *Managing your support workflow* (Using Zendesk)
- *GoodData for Zendesk* (webinar)
- *Intermediate Zendesk* (webinar)
- *Zendesk Integrations Overview*

Support options

Zendesk support agents are on hand to answer questions and offer advice. While you are in your trial period, you have all the features and support of the Plus+ plan.

Depending on your plan, you can contact Zendesk these ways:

- Our support web site: *http://support.zendesk.com* (Starter, Regular, Plus+, Enterprise)
- Email: support@zendesk.com (Regular, Plus+, Enterprise)
- Phone (Plus+, Enterprise)
    - +1 (415) 418 7506
    - +44 20 3355 7960
    - +61 3 9008 6775

- Skype: zendesk
- Twitter: *http://www.twitter.com/zendesk*
- Facebook: *http://www.facebook.com/zendesk*