Zendesk® User's Guide

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Preface

Welcome to the Zendesk User's Guide

The Zendesk User's Guide describes how to set up, manage, and customize your help desk. It is intended for Zendesk account owners and administrators, and also agents with access permissions to the administrative features of Zendesk.

Note: This guide does not yet contain descriptions of all of the Zendesk features. It is a work in progress. If you can't find the information you're looking for, search the *Zendesk Support forums*.

- *Zendesk glossary*
- *Help desk basics*
- *Managing people*
- *Tickets and channels*
- *Steamlining the help desk workflow*
- *Views, reporting, and performance*
- *Configuring and using your email channel*
- *Searching the help desk*
- *Customizing and extending your help desk*
- *Supporting multiple languages*
- *Zendesk Enterprise*
- *CSS Cookbook*

Chapter

1

Zendesk glossary

The glossary describes the key concepts and terminology used throughout Zendesk and is a good place to get started learning how to use the help desk.

Administrator

Administrators are agents with additional privileges to manage and customize the help desk. Administrators can be assigned tickets like agents but they may also do the following:

- Access all tickets (not just the tickets they are assigned to)
- Create new business rules (automations, macros, SLA service targets, triggers, views)
- Access and edit all help desk business rules (automations, macros, SLA service targets, triggers, views)
- Access and edit all help desk extensions (widgets, targets, etc.)
- Create reports
- Edit all reports
- Access settings pages (account, security, channels, etc.)
- Access all forums with moderator privileges
- Add and manage end-users, agents, and admins
- Promote agents to the admin role
- Create groups and organizations
- Assume another user's identity

Advisor

This is a Zendesk Enterprise agent role. Advisors manage the workflow and configure the help desk. They create or manage shared automations, macros, triggers, and views. They also set up the service level agreements, channels, and extensions. Advisors don't solve tickets, they can only make private comments. For more information, see *Custom agent roles*.

Agent

Agents are the bulk of the help desk support staff. They are assigned tickets and interact with customers as needed to resolve support issues. The agent's role and privileges in the help desk are defined by administrators and may include the following:

- May be added to more than one group (must be added to at least one)
- Add end-users
- Add public or private comments or both to tickets
- Create and edit their own macros
- Moderate and manage articles in the forums

- Access tickets in one of the following ways:

    - All tickets in the help desk
    - Only tickets assigned to the group or groups to which they belong
    - Only tickets received from the organization to which they belong
    - Only tickets that they are assigned to

Agent collision

Agent collision is a feature that alerts your agents when another agent is viewing and possibly updating the same ticket. When this happens, an alert is displayed at the top of the ticket (this alert is also displayed in views that are formatted as tables). This helps prevent agents from trying to make updates to the same ticket at the same time.

Agent signature

An agent signature is a standard text signature that can be appended to all public comments made by agents. An administrator can choose to include the placeholder {{agent.signature}} in the template (**Settings > Agents**) to enable agents to add their own signatures. Agents can customize their signature on their profile page.

Assignee

Assignee is the agent assigned to a ticket. Assignee is used throughout the help desk (including macros, views, automations, triggers, and reports) to refer to or set the assigned agent.

Assignee stations

This is the number of agents who have successively been assigned to a ticket. This is used as a condition in triggers.

Assume a user

Agents can log in to the help desk as another user. This is referred to as *assuming a user*. This allows agents to troubleshoot help desk issues (for example, why a trigger or automation isn't working). Agents can then easily revert back to their own identity. See *Assuming a user*.

Automation

Automations are similar to triggers because both define conditions and actions that modify ticket properties and optionally send email notifications to customers and the support staff. Where they differ is that automations run when a time event occurs (from one hour to 28 days) after a ticket property was set or updated, rather than immediately after a ticket is created or updated. For more information, see *Streamlining workflow with time-based events and automations*.

Blacklist

The blacklist is used to suspend email received from domains and addresses that you specify. It can be used along with the whitelist to, for example, suspend an email domain while also allowing one or more specific email addresses from the same domain to be accepted into the help desk. For more information, see *Using the whitelist and blacklist to control access to your help desk*.

Bulk import

Rather than add users manually one at a time, you can add many users in a bulk import. To do this, you create a CSV (comma separated values) file that contains the user's data. You can also import organization data. For more information, see *Bulk importing users and organizations*.

Business hours

Business hours are the days of the week and times of day that your help desk is available to respond to requests. By enabling business hours for your help desk, you can include business hours in triggers.

Business rules

Business rules is used to refer to the help desk features that enable you to customize and manage the support workflow: automations, macros, SLA service targets. triggers, and views. More information about business rules can be found here: *Streamlining the help desk workflow*.

Business rules analysis

In the Enterprise version of Zendesk, you can view and analyze all of your business rules to see how they are being used. For more information, see *Analyzing your business rules*.

Category

Categories are used to organize forums into groups. They are the top level organizing element in the forums. Categories contain forums and forums contain articles. You can create an unlimited number of categories and order them on the forums page as needed.

Channels

Channels are the ways that you can engage with your customers (how they create support requests and how you communicate with them). All channel communication is recorded on tickets. You choose and configure the channels you want your help desk to support. Channels include:

- Email
- Web portal
- Twitter
- Chat
- Voice
- Zendesk Feedback Tab
- Zendesk API

To set up channels, select **Settings > Channels**.

Chat

Similar to MSN Messenger, AIM, Google Talk, or Facebook Chat, your customers can text chat with your agents. Zendesk Chat is available when submitting a support request via the Feedback Tab or when an end-user is logged into the Web portal and viewing a ticket. The text of the chat session is added to the ticket.

Comment

When a ticket request is submitted it contains a subject and a description. All follow-up communication on the ticket is contained in comments. Agents add comments, macros and triggers and automation can add comments, and the requester can add comments. There are two types of comment: public and private. Everyone, including those CC'd on a ticket, can see public comments but only support staff can see private comments.

CSS customization

To more closely match the look of your company's web site, you can modify the default elements and styles in your help desk using CSS (cascading style sheets) code. Zendesk allows you to modify your help desk using CSS widgets, which can be added by an administrator. For more information, see *How to customize the help desk using CSS*.

Current user

Current user is a reference to the last person who updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated. And, the update may have been made by the assignee, the requester, or someone who was CC'd on the ticket.

Custom agent roles

In the Enterprise version of Zendesk, you can define your own agent roles and assign those roles to any agent in your help desk. This allows you to define agent roles that suit your own organizational structure and workflow. For more information, see *Custom agent roles*.

Custom ticket fields

You can add custom fields to tickets and they can be visible to agents only or to both agents and end-users. Your visible custom fields appear on your support request form in the Web portal and in the Feedback Tab. Custom fields are typically used to gather more information about the support issue or product or service. You can add the following types of custom fields: drop-down list, text, multi-line text, numeric, decimal, checkbox, regular expression. For more information, see *Adding and using custom ticket fields*.

Customer

This is often used interchangeably with end-user. See End-user.

Customer satisfaction rating

Your end-users (customers) can provide feedback about their experience with your help desk and support team by rating their solved tickets. For more information, see *Using customer satisfaction rating*.

Dashboard

A dashboard is an area of the help desk that displays summary information and vital statistics for the user. For example, the agent dashboard is displayed at the top of the home page when an agent logs in and it contains vital statistics such as the number of open tickets assigned both to the agent and the agent's groups.

Dynamic content

In the Plus+ and Enterprise versions of Zendesk, you can create dynamic content that can then be referenced via a placeholder in automations, macros, triggers and by many of the system

generated messages such as those sent in email notifications when a user creates an account. Dynamic content is a powerful tool for streamlining your multiple language support because the appropriate version of content is automatically displayed to users based on their language. For more information, see *Using dynamic content to provide multiple language support*.

Email forwarding

When you set up a Zendesk account, your help desk is given a default email address that customers can use to submit support requests. Many accounts prefer to use their own email addresses rather than use the Zendesk provided address. You can use email forwarding to accept email at your own address (for example, help@mycompany.com) and then forward it to your Zendesk address (support@mycompany.zendesk.com). You can also forward any prefix to @mycompany.zendesk.com and then set up triggers and automations from there.

Email notifications

Email notifications can be generated via a trigger or automation when a ticket is updated. Common notifications include a new public comment added to the ticket or a change to the ticket status.

Email-only help desk

Many help desks prefer to not require their end-users to log in to the Web portal. They provide the same level of service, but their end-users don't have access to the Web portal to view or track their requests. Instead, all communication between agents and end-users occurs using channels such as email, and voice, and chat. For more information, see *Setting up an email-only help desk*.

Email pass through

When forwarding email from external email addresses or using an external email domain for outgoing email, the Reply From address (the address that end-users see in email responses to their support requests) can be configured to use the same email address that was used to submit the request. For more information, see *Setting up email pass through*.

End-user

End-user refers to people who generate support requests from any of the available support channels (Web portal, email, Twitter, etc.). End-users do not have access to any of the administrator and agent features of the help desk. They can only submit and track tickets and communicate with agents publicly (meaning their comments can never be private). End-users may also be referred to as customers. For more information about user roles, see *Understanding help desk user roles*.

Extensions

Extensions are tools that extend the functionality of the help desk. For example, you can add CSS and JavaScript widgets to customize the look or functionality of your help desk or you can enable integrations with cloud-based software applications and services such as Salesforce, Google Analytics, and Constant Contact - just to name a few. Extensions can be configured by agents with administrator permissions (**Settings > Extensions**).

External email domain

You can change your email address to an email domain other than myaccount.zendesk.com, making it appear that it originated from your own email address (help@mycompany.com). For more information, see *Using an external email domain*.

Feedback Tab

The Feedback Tab provides quick access for your end-users to search your knowledge base, submit a support request, or chat with an agent. It's displayed as a tab placed along the edge of the Web browser. The Feedback Tab can be added to your help desk or any other web site (such as your company web site). This feature used to be referred to as the Zendesk Dropbox.

Forums

Forums, when not used in the general sense, refers to the second level of organization after categories. Forums contain articles. Each forum can be assigned to only one category. You can assign viewing permissions to forums. For example, forums can be viewable by everyone, only logged in users, only agents, or only specified organizations. You can also control moderation, forum content types (articles, ideas, and questions), and who can contribute content.

Forum analytics

In the Plus+ and Enterprise versions of Zendesk, you can closely monitor how active your knowledge base and forums are using the Stats dashboard. For each category and forum, you see activity data for the last 30 days. This includes the number of new topics created, how many users have viewed the topics, and the total number of votes, subscriptions, and comments. For more information, see *Analyzing forum activity*.

Group

Groups are used to create collections of agents. How you define groups is entirely up to you. You might create groups by skill (software vs hardware) or to reflect the organizations they serve (for example, a support group might serve only customers in a certain region or time zone). Agents can belong to more than one group. End-users cannot be added to groups, only organizations. For more information, see *About organizations and groups* and *Creating, managing, and using groups*.

Group stations

This refers to the number of groups that have successively been assigned to a ticket. This is used as a condition in triggers.

Host mapping

Host mapping (also referred to as domain mapping) is the ability to map your default Zendesk domain URL to a different URL. For example, rather than using http://support.mycompany.zendesk.com you may want your help desk URL to contain your company's name, like this: http://support.mycompany.com. You need to configure this with your domain provider.

Knowledge base

Knowledge base is often used interchangeably with forums (see Forums). The Zendesk forums allow you to create topics and arrange them into forums and categories. You can use the forums to create a knowledge base of support information for your products and services. Your end-users may be allowed to comment on topics or new create new topics themselves.

Legacy agent

This is a Zendesk Enterprise agent role. If you upgrade your account to the Enterprise version, this role is used for all agents who have not been assigned to one of the other Enterprise roles. Each agent's permissions are the same as they had previously on the plan you upgraded from. If you assign all your agents to Enterprise agent roles, this role will disappear. You cannot select this agent role, it's only used to designate agents not yet assigned Enterprise roles. For more information, see *Custom agent roles*.

Light agent

This is a Zendesk Enterprise agent role. Zendesk Enterprise provides you with unlimited internal usage in the form of light agents. Light agents can be CC'd on and view tickets, add private comments to tickets within their groups, view reports, access and create topics in private, agent-only forums. They cannot be assigned to or edit tickets. You can add an unlimited number of light agents at no charge. For more information, see *Custom agent roles*.

Liquid markup

Liquid markup is the templating language we use to enable placeholders (*Using placeholders*). You can also use Liquid markup to customize how this data is selected and displayed as output in ticket comments and email notifications. For more information, see *Using Liquid markup to customize comments and email notifications*.

Macro

A macro is a prepared response or action that agents can use to quickly respond to support requests that can be answered with a standard response or to modify a ticket. Macros contain actions, which can be updates to ticket properties. Agents manually apply macros when they are creating or updating tickets. Macros can also be organized into categories to help agents quickly locate them. For more information, see *Creating ticket handling shortcuts with macros*.

Multiple brand help desk

In the Enterprise version of Zendesk, you can manage support for multiple brands by linking separate branded help desks to a central help desk. Support requests are received by the branded help desks and are automatically shared to the central help desk, which contains the support agents who resolve the requests. One team of agents supports all of your brands. For more information, see *Setting up to manage multiple brand help desks*.

Non-restricted agent

A non-restricted agent is an agent who has access to all tickets. In other words, they have not been restricted to only the group or groups to which they belong, the organization they belong to, or to the tickets they have been assigned to. The ability to refer to these agents may be useful when creating triggers.

Organization

Organizations are collections of users (agents and end-users). How you set up your organizations is entirely up to you. Agents and end-users can be added to only one organization. Once you create them, you can use organizations throughout the help desk to define views, as criteria for assigning tickets, as conditions in automations and triggers, to

define access to forums, and in your reports. For more information, see *About organizations and groups* and *Creating, managing, and using organizations*.

Owner

The account owner is a 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 of the help desk that other administrators do not, such as invoicing, payment options, and benchmarking for the account. For more information about user roles, see *Understanding help desk user roles*.

Personalized email replies

The email address used in replies to end-users can be configured to show the agent's name as the friendly name rather than your help desk name. For example, "Claire Grenier <notifications-support@myaccount.zendesk.com>" instead of "MondoCam Support Center <notifications-support@myaccount.zendesk.com>". For more information, see *Enabling personalized email replies*.

Placeholders

Placeholders are references to ticket and user data that you include in the subject and text of email notifications. Without placeholders it would be impossible to create automatic notifications. You'd have to manually enter this data for each ticket. Placeholders are contained in double curly brackets, like this: {{ticket.assignee.name}}. You can view the list of available system placeholders in the help desk when creating macros (for example). Custom fields can also be referenced as placeholders. For more information, see *Using placeholders*.

Priority

Each ticket is assigned a priority. There are four values for priority: Low, Normal, High, and Urgent. The ticket priority is used throughout the help desk to generate views and reports and it's also used as conditions and actions in automations and triggers and as actions in macros.

Remote authentication

Remote authentication is one of the two Single Sign-On services available in Zendesk. The other is SAML. See Single Sign-On.

Reports

Reports are detailed snapshots of collections of tickets within a time period. You can use many of the ticket properties to define the types of tickets that you want to monitor with a report. For more information, see *Using reports to monitor ticket activity and agent performance*.

Requester

Requester refers to the person who made the support request. Requester is used throughout the help desk (including macros, views, automations, triggers, and reports) to refer to the person who generated the support request.

Restricted agent

The term restricted agent is used for agents whose ticket access has been limited to one of the following:

- All tickets (can also add, modify and assume end-users)
- Tickets requested by users in this agent's organization (also can't see forums restricted to other organizations)
- Tickets assigned to this agent only

An agent's access can be restricted via their user profile.

SAML

Secure Assertion Markup Language (SAML) is one of the two Single Sign-On services available for remotely authenticating users, the other is Remote Authentication. SAML allows you to provide Single Sign-on (SSO) for your help desk using enterprise identity types such as Active Directory and LDAP.

Shared organization

A shared organization refers to allowing all users within an organization to see all of the organization's tickets and, optionally, allowing those users to comment on each other's tickets. An administrator can set up shared organizations (it's an option available when creating or editing an organization). You also have the option of granting this privilege to select end-users instead. You set this up in the user's profile. See *Shared organization for end-users*.

Single Sign-On

Single Sign-On refers to a security option in Zendesk that allows you to authenticate users remotely, which means that it is handled outside of Zendesk. You can use remote authentication or SAML authentication. When users attempt to log in to Zendesk their login request is routed to a remote authentication or SAML service to authenticate the user's credentials. When verified, users are redirected back to Zendesk and logged in.

SLA (Service Level Agreement) service targets

Service Level Agreements, or SLA's are typically an agreed upon measurement of the average response and resolution times that your support delivers to your customers. Providing support based on service levels ensures that you are delivering measured and predictable service, and have greater visibility when there are problems. SLA Service Targets in Zendesk can be defined so you and your agents can better monitor your service level performance and meet your service level goals.

Staff agent

This is a Zendesk Enterprise agent role. A Staff agent's primary role is to solve tickets. They can edit tickets within their groups, view reports, and add or edit personal views and macros. For more information, see *Custom agent roles*.

Status

Each ticket is assigned a status. There are five values for status: New, Open, Pending, Solved, Closed. The ticket status is used throughout the help desk to generate views and reports and it's also used as a condition in automations, macros, and triggers. The status can only be changed to closed via automations and triggers (not manually).

Support request

This term is used to describe what end-users create, via the Web portal or any of the other channels such as email and Twitter, when they request support. Support requests become tickets in the help desk. To end-users, a ticket is a support request and this is the term used in the Web portal (for example, **Submit a request** and **Check your existing requests**).

Suspend a user

Users can be suspended, which means that they are no longer able to log in to the help desk and any new support requests you receive from the user are sent to the suspended tickets queue. For more information, see *Suspending a user*.

Suspended ticket

Based on a number of factors (such as an email being flagged as spam) some of the email coming into your help desk may be suspended or even rejected. Email messages that are suspended are added to the suspended tickets queue from where they can be recovered or deleted. For more information, see *Managing suspended tickets*.

Tag

To help you categorize, act on, or search for tickets and forum articles, you can add tags. Tags can be added to tickets automatically based on the words in the request, manually by agents, or via triggers, automations, and macros. Once added, you can create views by tags, search for tags and the tickets in which they are included, and use tags in your triggers, automations, and macros. For more information, see *Using tags*.

Target

There may be times when you want to notify an external system about a new ticket or an important state change to a ticket (for example, send a message when a high priority ticket has not been resolved after a specified amount of time). By setting up external targets you can communicate with many cloud-based applications and services (such as Twitter and Twilio) as well as HTTP and email. For more information, see *Notifying external targets*.

Team leader

This is a Zendesk Enterprise agent role. Team leaders have greater access to the help desk than staff agents. They can read and edit all tickets, moderate forums, and create and edit end-users, groups, and organizations. For more information, see *Custom agent roles*.

Ticket

Support requests received from any of the help desk channels (see Channels) become tickets. Each ticket is assigned to an agent to solve and all activity related to solving the support request is captured as details within the ticket. The entire help desk is built around receiving, managing, and solving tickets. Ticket data includes Subject, Email, Description, Status, Type, Priority, Group, Assignee, Tags, and any other custom fields you create. Each ticket requires a subject, email address, and description.

Ticket sharing

Tickets can be shared between help desks so that you collaborate only solving tickets. You establish sharing agreements with other help desks and specify the terms under which sharing

can occur, and how shared tickets are managed between help desks. For more information, see *Sharing tickets between help desks*.

Trigger

Creating or updating tickets in Zendesk generates events. You can use these events to automatically modify tickets and send email notifications. For example, when a new ticket is created Zendesk sends an email confirmation to the person who generated the ticket (the requester). The mechanism that enables this is called a trigger. Using triggers, you can also automatically assign a ticket to a specific support agent or support group based on the email address it was sent to, the organization to which the requester belongs, or keywords contained in the request message. For more information, see *Streamlining workflow with ticket updates and triggers*.

Type

Each ticket is assigned a type. There are four values for type: Question, Incident, Problem, Task. The ticket type is used throughout the help desk to generate views and reports and it's also used as a condition in automations, macros, and triggers.

User tagging

Tags can be added to users and organizations and these tags can then be used in business rules to manage the ticket workflow and to restrict access to forums. For more information, see *Adding tags to users and organizations*.

View

Views define a collection of tickets based on a set of criteria (expressed as conditions). Views can be formatted to be displayed as lists or tables and you can specify who can access them. You create and use views to define collections of tickets such as "My open tickets" or "Recently solved tickets" for example. For more information, see *Using views to manage ticket workflow*.

Voice

The Zendesk Voice channel integrates live telephone support into your help desk. Agents make themselves available to receive calls and their conversations with customers are recorded and added to tickets. When agents are unavailable, customers leave voicemail messages that automatically become tickets containing the voicemail recording and a transcription. For more information, see *Setting up Zendesk Voice*.

Web portal

This refers to the parts of the help desk application that are available to end-users to submit tickets, track their support requests, and access your knowledge base and forums.

Whitelist

The whitelist is used to allow email to be received from specific email domains and addresses. It is used along with the blacklist to, for example, allow email from a specific address in a blacklisted domain to be accepted into the help desk (and not suspended). For more information, see *Using the whitelist and blacklist to control access to your help desk*.

Widget

A widget is a small application that extends the functionality of the help desk. You can add widgets into the help desk (they are displayed in the right side of your help desk pages) for a number of popular cloud-based applications and services such as Salesforce and Google Analytics or you can create your own custom widgets.

Chapter

2

Help desk basics

Understanding help desk user roles

The help desk 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.

Users and people are essentially equivalent terms; it's the broadest definition for all people who use the help desk. When you need to manage people in the help desk, your starting point is almost always **Manage > People**. This is where you add new users, define their roles and privileges, and then organize them using groups and organizations. You'll usually only see the word *users* in documentation like this.

Each user's role is defined when they are added to the help desk. And, when users log in, they are only shown the parts of the help desk that they are allowed to see and use.

End-users, or customers

End-users are also sometimes referred to as customers. These are the people who generate support requests from any of the available support channels (Web portal, email, Twitter, etc.). They don't have access to any of the admin and agent features of the help desk. They can only submit and track tickets and communicate with agents publicly (meaning their ticket comments can never be private).

How end-users interact with your help desk depends first on the support channels they have available to them and then by how you've defined public access. You can run an open or closed help desk. Open means that anyone can submit tickets. Closed means the opposite, and as you might imagine, it's how you'd set up a help desk for an internal support operation for a corporation, for example. In a closed help desk, you add the end-users. In an open help desk, you can add users yourself and end-users can add themselves by submitting tickets.

You can either require end-users of an open help desk to register, or not. In a closed help desk, all end-users must be registered of course.

You can also control if and how your end-users access the help desk Web portal. This is the end-user's view of the help desk and includes the submit request page, the knowledge base and community forums, and a view of their tickets. However, if your end-users aren't registered, they don't have access to that view of tickets (they must be logged in). For these end-users, all communication with the support team is via email. For more information, see *Setting up an email-only help desk*.

You also have the option of adding your end-users to an organization, which is a collection of users (both end-users and agents) that can be used in many ways throughout the help desk workflow. For more information, see *About organizations and groups*.

Agents, admins, account owner

The people who resolve support requests, you, play different roles in setting up and managing the help desk workflow.

Agents

Agents are the bulk of the help desk support staff. They are assigned tickets and interact with customers as needed to resolve support issues. The agent's role and privileges in the help desk are defined by admins and may include the following:

- May be added to more than one group (must be added to at least one)
- Add end-users
- Add public or private comments or both to tickets
- Create and edit their own macros
- Moderate and manage articles in the forums
- Access tickets in one of the following ways:

    - All tickets in the help desk
    - Only tickets assigned to the group or groups to which they belong
    - Only tickets received from the organization to which they belong
    - Only tickets that they are assigned to

Admins can add new agents to the help desk either manually one at a time or as a bulk import operation (you can set the user role in the CSV data file used in a bulk import). Agents can be promoted to the admin role by an admin.

Agents are added to groups. Each agent must be added to at least one group. For more information about groups, see *About organizations and groups*.

As noted above, there are a number of ways to limit the access agents have to tickets in the help desk. These are explained in Creating, managing, and using groups.

Admins

Admins are agents with additional privileges to manage and customize the help desk. Admins can be assigned tickets like agents but they may also do the following:

- Access all tickets (not just the tickets they are assigned to)
- Create new business rules (automations, macros, SLA service targets, triggers, views)
- Access and edit all help desk business rules (automations, macros, SLA service targets, triggers, views)
- Access and edit all help desk extensions (widgets, targets, etc.)
- Create reports
- Edit all reports
- Access settings pages (account, security, channels, etc.)
- Access all forums with moderator privileges
- Add and manage end-users, agents, and admins
- Promote agents to the admin role
- Create groups and organizations
- Assume another user's identity

Admins are responsible for designing and implementing the help desk workflow. They add end-users, agents, and other admins; define the business rules (automations, triggers, views, etc.); and customize and extend the help desk. Where an agent's primary function is to interact with end-users and resolve support requests, admins may do that as well as set up and manage the workflow.

Note: You may find general references in the documentation or the user interface to agents being able to do something in the help desk. It's important to remember that if an agent can do something so can an admin. It's not the other way round. So, the shorthand of 'agent' may be used at times when the exact implication is 'agent and admin'.

Account owner

The account owner is a type of admin. 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 admin if needed. The account owner has access to areas of the help desk that other admins do not, such as invoicing, payment options, and benchmarking for the account.

User references in business rules

Business rules need to refer to some types of users in more abstract ways to define conditions and actions; therefore, you'll see references in the help desk to *requester*, *submitter*, *assignee*, *current user*, and *non-restricted agent*.

Requester

Requester refers to the person who made the support request. Requester is used throughout the help desk (including macros, views, automations, triggers, and reports) to refer to the person who generated the support request.

Submitter

The ticket submitter is either the user who submitted the request or the agent that opened the ticket on behalf of the requester.

Assignee

Assignee is the agent assigned to a ticket. Assignee is used throughout the help desk (including macros, views, automations, triggers, and reports) to refer to or set the assigned agent.

Current user

Current user is a reference to the last person who updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated. And, the update may have been made by the assignee, the requester, or someone who was CC'd on the ticket.

Non-restricted agent

A non-restricted agent is an agent who has access to all tickets. In other words, they have not been restricted to only the group or groups to which they belong, the organization they belong to, or to the tickets they have been assigned to. The ability to refer to these agents may be useful when creating triggers.

About organizations and groups

Organizations and groups are used to manage your help desk users and the ticket handling workflow.

Organizations and groups defined

Each collection of users is defined as follows:

Organizations

Organizations are collections of your users (both end-users and agents). Each user can be added to only one organization. The use of organizations is optional, but by arranging your end-users into organizations you can keep track of what those organizations are requesting. You can also enable users within an organization to see each other's tickets. This expands visibility of the organization's support issues and should reduce the number of duplicate tickets.

Groups

Groups can only contain agents. Agents must be assigned to at least one group, but they can be members of more than one. Groups can be used to support organizations.

End-users and organizations

Although you don't have to add your end-users to organizations, it can be extremely helpful in managing the workflow. First, let's define that we mean by end-user. These are the people that generate support requests. They are your customers in a retail setting and the employees that are supported by an internal help desk in a corporate setting (to name two common types of end-users). How you organize your end-users is entirely up to you; however, here are a few examples of how organizations can be used:

To support service level agreements

You can create organizations that mirror the service level agreements that you've established with your customers. For example, your paying customers are guaranteed a faster response than those who use your free services and you want to distinguish between the two. Or, perhaps you've set up levels of support based on which version of your products and service levels your customers have purchased (for example: basic, professional, enterprise or silver, gold, platinum). You can create organizations for each set of customers and route them through the help desk workflow accordingly. You can then create business rules and reports to escalate tickets as needed and to track performance against your service level agreements.

To track and manage tickets by company

Perhaps you sell your products to other businesses. You can create organizations for each of those companies to manage and track their ticket activity.

To manage requests based on email domains

You can automatically add end-users to organizations based on their email domain. For example, you might have both internal and external end-users. You can create an organization for your internal end-users and automatically add them to the organization, based on their

email domain, the first time they submit a request. The new request is then picked up in the workflow rules you've set up for that organization.

To support customers by location and language

If you support organizations or individual customers across the globe, you can create organizations for locations and languages and then route those requests to agents that are co-located and speak the same languages.

To define access to forums

You can use organizations to define who can see what in your forums. You might want most of your forums to be viewable by all your end-users but also create several just for certain groups of users (customers with premium service plans perhaps). Organizations allow you to do this. When you create a forum, it is by default viewable by everyone. If you want to restrict access to it, you simply select the one organization that you will allow to see it.

You can create organizations and add end-users to them manually, one at a time, or automate the process by adding users and their organizations in a bulk import operation.

Agents can also be added to an organization. You might do this as part of organizing the users in your help desk or to restrict an agent's access to only the organization they belong to (this is an option when setting the agent's privileges).

Once you've gotten organizations set up, they can be used in many ways in the help desk to manage the workflow. See *How to use your organizations and groups* below.

Agents and groups

Groups are only for agents and every agent must belong to at least one group. Like organizations, how you set up groups depends on your business needs and the help desk workflow you prefer. Here are some of the common ways that groups are used:

To escalate tickets based on complexity

You can manage escalation by setting up a tiered support group structure. For example, you can create groups for levels of support based on factors such as urgency and complexity. By default, you could assign all tickets to the Level 1 group and then escalate them to Level 2 manually based on the technical complexity of the issue. The Level 2 agents (who may also be members of the Level 1 group) have the advanced technical skills needed to resolve the issue. For an example of this, see *Escalating your tickets with groups*.

To support service level agreements

As in the example for organizations above, you can set up corresponding groups to support organizations defined by service levels.

To provide support by expertise

You can create groups based on expertise. For example, a company that develops both software and hardware might place the agents who support the software into one group and those agents who support the hardware in another. A custom field could be added to the support request form prompting end-users to specify the product they're seeking support for and this could be used to route the ticket to the appropriate group.

To support customers by location and language

As noted above, you can set up organizations by location and language and then assign agents (or groups) to their tickets. Even if you didn't set up organizations for this, you can route to tickets to these groups based on the end-user's email domain (*somecompany*.fr, for example) or their language preference.

When you create groups, you can add existing agents to them. You can add new agents to one or more groups when you're adding them to the help desk. You can also bulk import new users and define their role as agent; you then manually add them to groups.

How groups support organizations

So how do groups support organizations? In the broadest sense, simply by becoming hubs of support for the tickets that are received from the end-users in your organizations. What group is assigned to an organization's tickets can be based on the many considerations outlined above (help desk escalation processes, security, co-location and language, and so on).

You can take a loose approach to this and just allow agents to triage and assign requests to groups based on their reading of the support request or you can create business rules to handle that automatically. See *How to use your organizations and groups* below.

You can also more tightly manage the workflow and create security boundaries by funneling tickets directly to agents who have restricted access. This means that they can only see the tickets that they are allowed to see. You can do this in two ways. The first is to add the agents to groups and then restrict their access to only those groups. You can also add an agent to an organization, which restricts their access to only those tickets that are submitted by end-users in that organization.

Note: In Zendesk, you'll see references to *non-restricted agents*. These are agents who have not been restricted in these ways and can access all tickets.

How to use your organizations and groups

Once you've got an organization and group structure in place, you can use it to manage the ticket workflow and monitor your help desk activity.

Here are some of the ways you can use organizations and groups in your workflow [this section will contain links to more detail]:

- Automatically assign tickets received from users in an organization to a specific group (referred to as *group mapping*)
- Map incoming new users to an organization based on their email domain (referred to as *user mapping*)
- Allow users within an organization to see all the tickets in their organization (referred to as a *shared organization*)
- Assign agents to support only one organization
- Use organization as a condition in a trigger to automatically assign requests to a group or agent
- Use a trigger condition to test for tags and then automatically assign requests to a group or agent based on those tags
- Create macros that assign new requests to a group or agent
- Create automations that escalate tickets to a group or agent

- Create views by organizations or groups
- Create reports by organizations or groups

Admin and agent roles for users, groups, and organizations

Here's a quick overview of who can do what in the help desk to manage users, groups, and organizations.

Admins

- Add end-users manually (one at a time) or add many end-users at a time in a bulk import
- Create and edit organizations and groups
- Add end-users to organizations
- Create new agents and add them to one or more groups and one organization
- Limit an agent's access to one or more groups
- Limit an agent's access to requests received from the organization that an agent belongs to
- Set up email mapping (automatically map end-users from specific email domains to an organization)
- Set up group mapping (assigning incoming requests from users in an organization to a specific agent group)
- Set up a shared organization (allow all end-users in an organization to view tickets from all users in the same organization)
- Create both shared and personal views by users, groups, and organizations
- Create business rules (automations, macros, and triggers) that include groups
- Create business rules (automations and triggers) that include organizations
- Create reports that include groups and organizations

Agents

- Add end-users
- Add end-users to organizations
- Allow end-users to view all the tickets in their organization (if the user belongs to a shared organization, then the user always has access to tickets in the organization)
- Add themselves to an organization
- Create personal views by users, groups, and organizations
- Create macros to assign tickets to a group

Streamlining the help desk workflow

Managing your customers' support issues and your help desk workflow requires tools that help you to create as many process efficiencies as possible. The best way to understand how Zendesk makes this possible is to look at how a typical help desk workflow can be streamlined with the tools that Zendesk provides.

Ticket handling shortcuts

It's common to get support requests for issues that affect more than one person and can be answered with a single, standard response. To do this in Zendesk, you use *macros* to create the standard responses and they are then manually applied to tickets by agents. Macros can also be used to update tickets (for any number of reasons) without also notifying the requester. For example, you can use macros to can change the agent or group assignment.

Here's an example of a macro that sends an email notification to the requester in response to an issue that affects many people in an organization:

This macro adds a public comment to the ticket (which the requester receives in email), sets the status to solved, and adds a relevant tag (we'll discuss tags shortly). You could extend this macro to also set the ticket type to incident and add a link to the original problem ticket. Using a macro in this situation is much quicker than manually responding to everyone who is affected.

In the text of the comment above, you may have noticed the text contained in the double curly brackets. These are called *placeholders* and their purpose is to stand in for data that will be automatically inserted into the email notification. Without placeholders it would be impossible to create automatic notifications. You'd have to manually enter this data for each ticket. For more information about placeholders and how they are used, see *Using placeholders*.

Macros are also used as shortcuts to streamline repetitive ticket handling tasks. Here's an example of a macro that is used by the support staff and does not notify the requester:

The **Take it!** macro assigns the ticket that an agent is currently viewing to that agent and the agent's group.

To see this for yourself, select **Manage > Macros** and then select the macro called **Take it!**. Click **Edit** to see the actions contained in the macro.

Macros are applied to tickets in ticket editing mode by clicking **Apply Macro** and selecting one from the list of active macros.
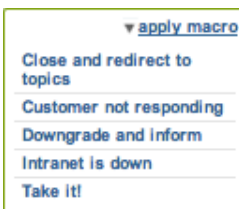
You can also apply macros to one or more tickets displayed in a view. For more information about creating and using macros, see *Creating ticket handling shortcuts with macros*.

Triggering actions when tickets are created or updated

When a ticket is created or updated, you can immediately and automatically respond by modifying ticket properties (opening the ticket and assigning an agent, for example) and sending email

notifications to the requester (confirming that their request has been received and that a ticket has been created, for example). The mechanism that enables this is called a *trigger*.

Using triggers, you can also automatically assign a ticket to a specific support agent or support group based on the email domain of the ticket requester or keywords contained in the request message. Those are just a few examples; triggers can be used in many ways.

A trigger is a combination of conditions and actions. Conditions define the criteria that, if true, trigger the actions. In other words, if all these things about the ticket are true then make these changes and, optionally, notify either the customer or the support staff. Here's an example of one of the triggers included in Zendesk:

To see this for yourself, select **Manage > Triggers and mail notifications** and then select the trigger called **Notify requester of received request**.

The conditions in this trigger require that the ticket is newly created and that the status is not solved (a new ticket with no further action taken on it). If those two conditions are true, the action sends an email notification to the requester informing them that the request has been received and is now a ticket (and they are provided with the ticket ID and URL). You can modify the email message as you like and, if you're running an email only help desk, you can also remove the ticket URL. You can create copies of the default Zendesk triggers or create new triggers as needed.

It's important to note that as new tickets are created or existing tickets are updated, Zendesk automatically runs through *all* of your triggers (from first to last) checking to see if each trigger's criteria are met. Whenever the ticket matches the conditions, the trigger is fired. This means that what happens in one trigger may affect what happens in other triggers.

For more information about creating and using triggers, see *Streamlining workflow with ticket updates and triggers*.

Using time to streamline workflow

While triggers enable you to automatically act on tickets when they are created or updated, you can also modify tickets and send email notifications based on events in time. For example, you may want agent groups to be alerted if tickets remain unassigned after 24 hours. To do this in Zendesk, you use *automations*.

Automations, like triggers, contain conditions and actions, as shown here:

To see this for yourself, select **Manage > Automations** and then select the trigger called **Close ticket 4 days after status is set to solved**.

As the conditions indicate, this automation runs on all tickets that have been set to solved for more than 96 hours. The action changes the status from solved to closed. If you're curious, 4 days (96 hours) is a help desk best practice for the minimum amount of time a ticket should remain in the solved state before it is closed.

Unlike triggers, which are based on ticket events and run immediately after tickets are created or updated, automations only run once every hour and only on tickets that have been created or updated in the last 28 days.

For more information about using automations, see *Streamlining workflow with time-based events and automations*.

Using ticket events to notify external targets

There may be times when you want to notify an external target about a new ticket or an important state change to a ticket (for example, send an email or text message when a high priority ticket has not been resolved after a specified amount of time). By setting up external *targets* you can communicate with many cloud-based applications and services (such as Twitter and Twilio) as well as HTTP and email.

Once you've defined a target you can add it to automations and triggers. For the complete list of the types of targets you can create, select **Settings > Extensions > Targets > Add Target**. For more information about creating and using targets, see *Notifying external targets*.

Using tags to manage workflow

To help you categorize, act on, or search for tickets and forum articles, you can add *tags*. Tags can be added to tickets automatically based on the words in the request, manually by agents, or via triggers, automations, and macros. Once added, you can create views by tags, search for tags and the tickets in which they are included, and use tags in your triggers, automations, and macros.

Tags

| forums × | defective × | faq × | installation × | about_sales × |
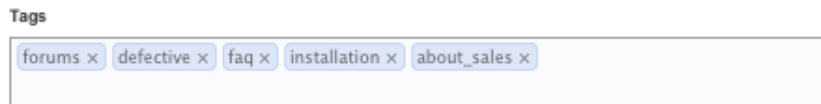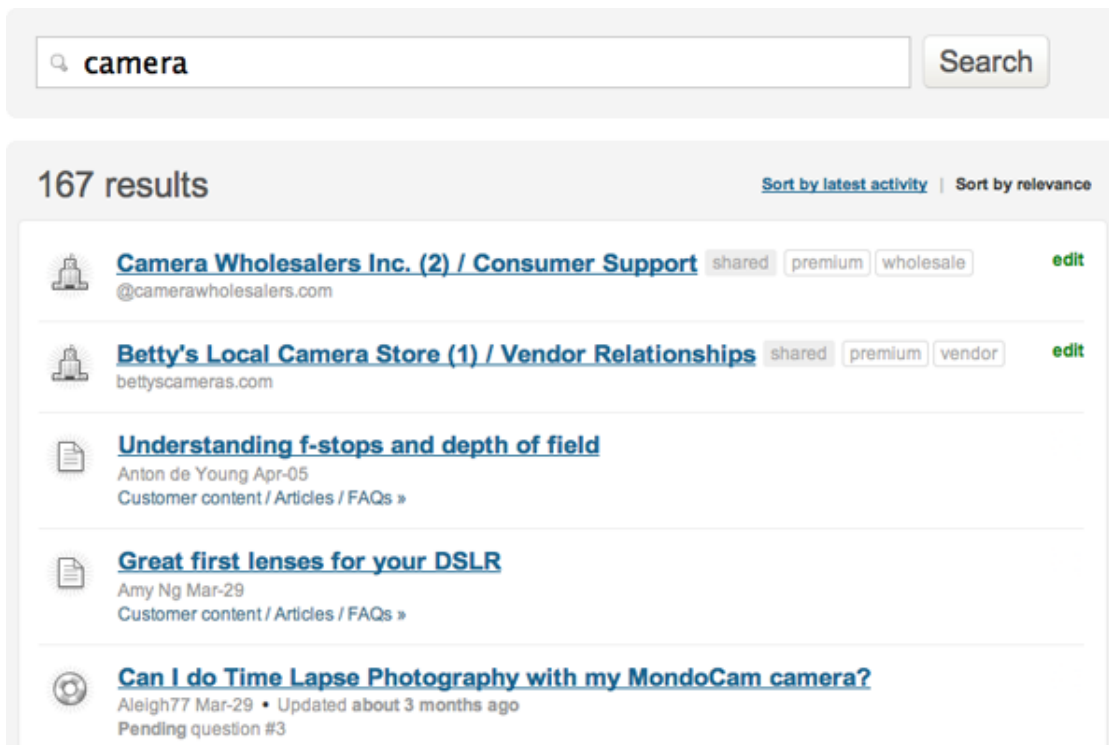
Tags are helpful throughout the entire help desk workflow, but are especially so for the following help desk tasks:

• Locating answers to support requests that have already been answered. Agents can search for tickets by tags.
• Creating ticket reports using tags. This provides you with a way to monitor hot issues and trends, for example.
• Creating custom workflows. Perhaps you want to add a custom field to your support request form and then act on that data. Custom fields contain tags that can then be added to triggers to, for example, route a request for a specific product to a specific support group or agent.

For more information about all the uses of tags, see *Using tags*.

About searching the help desk

Searching the help desk works pretty much the way that you would expect: you enter search terms and you get results that contain those words. A simple word search for something like 'camera' returns any results from the entire help desk (ticket properties, user properties, comments, tags, forum topics, and so on).

Beyond that simple full text search, you can also restrict your searches to just ticket, user, topic, group, and organization data. To do this, you use the data object properties as keywords in a search.

This returns all tickets that have a status of pending. Zendesk supports common search operators that you use when searching the Internet such as : (equals), > (greater than), < (less than), and "" (phrase search).

Searching for user, organization, and group data returns user profiles and group and organization summary pages that display each entity's activity, including tickets.

Admins can search the entire help desk and agents can search the tickets and users that they have been given permission to see. End-users can search the knowledge base, their own tickets, and their organization's tickets (if they belong to a shared organization).

For all of the details about searching the help desk, see the following:

- *Zendesk search reference*
- *Searching users. groups, and organizations*
- *Searching tickets*

Security best practices

More than 10,000 customers use Zendesk as a customer service and support system worldwide. Zendesk prides itself on providing a range of security options that you can use to ensure that private information is protected and secure. By following these seven best practices, you can increase the security of your Zendesk.

Note: If you are ever in doubt about the security of your Zendesk system, feel free to contact Zendesk directly. In the event of a suspected security breach, you should submit a ticket with the subject "Security" along with the details. Alternatively, you can send email to security@zendesk.com or call the customer support line at 415-418-7506 (Americas, US), +44 20 3355 7960 (Europe, UK), +61 3 9008 6775 (Asia-Pacific, Australia).

1. Increase password security

Zendesk provides three levels of password security: low, medium, and high. An administrator can set password security by selecting **Settings > Security > Password Security**.

Increasing your password security can help to prevent unauthorized users from guessing your agent's passwords. At the highest level of security, your users are required to choose a new password every 90 days.

You should also require your administrators and agents to select unique passwords for their Zendesk account. In other words, they should use a password that they are not also using for external systems such as Salesforce, GoodData, and so on. If one account is hacked and a password is discovered, the hacker's access will be limited to just that one account – not all accounts.

2. Never give out user names, email addresses, or passwords

While there is a fine line between meeting the needs of your users and maintaining security, best practices are that Zendesk agents and administrators should never give out user names, email addresses or passwords.

If you're using standard Zendesk login authentication, the only secure way to reset a password is for the user to click the link to create a new password (Help! I don't know what to enter here!) from the login screen of your help desk. This prompts the user to enter a valid email address (one already verified as a legitimate user in your account) and they receive an email at that address prompting them to reset their password themselves.

If you're using a third party single sign-on authentication system such as ActiveDirectory, OpenDirectory, LDAP or SAML, passwords can be reset in a similar fashion through those services.

Be aware that hackers sometimes use social engineering techniques to pressure people into helping them out by giving them a password for an account. In some cases, they do this by contacting customer service personnel during evenings or weekends when they suspect there are fewer senior staff working. They may even claim that there's been a security breach and that the password needs to be reset immediately to some new text that they provide.

Some hackers have tools that enable them to spoof email addresses to impersonate users from legitimate email domains. As a result, even what appears to be a legitimate email request from a user may not be from that actual address. If someone who claims to be an administrator or user of an

account contacts you, you should note the IP address (this is shown in the events and notifications view in tickets), and independently verify his or her identity (for example, by calling them at the phone number in their user profile). If in doubt, never provide any sensitive information or make account changes on someone else's behalf. Legitimate users should be able to change their account settings using the methods described above.

We recommend that you educate your agents about these types of security risks and also create a security policy that everyone knows and can refer to when these incidents occur.

3. Limit the number of agents with administrator access

Administrators have access to parts of the help desk that regular agents do not. For example, all of the security features described in this document are only available to administrators. By limiting the number of agents who have administrator access, you reduce your security risk. The agent role provides the access that typical agents need to manage and solve tickets.

In the Enterprise version of Zendesk, you can select pre-defined agent roles that grant additional permissions to agents. You can also create your own custom agent roles and decide what parts of the help desk that the agent role can access. These permissions however are limited to the user, ticket, forum, and workflow management parts of the help desk. Only account owners and administrators have access, for example, to security settings. For more information, see *Custom agent roles*.

4. Routinely audit your Zendesk account

If you follow all of the above techniques, your Zendesk account should always be private and secure. However, it is still considered best practice to routinely check for suspicious activity. We suggest that you use the following checklist once a month (or more frequently) to ensure that no mistakes have been made that may leave your system vulnerable.

- Review agent access and roles from the **Manage > People** menu to look for unknown agents, administrators, or unusual email addresses not in your company domain.
- If you are using the email archiving feature in the Enterprise version of Zendesk (**Settings > Tickets > Email Archiving**), make sure that email address is legitimate. See *Archiving email notifications*.
- Make sure that the URL to your help desk logo (**Settings > Account > Branding**) is correct and has not been changed.
- Verify that all targets you use (**Settings > Extensions > Targets**) are valid and point to known and correct addresses. See *Notifying external targets*.
- Review all targets and automations that send notifications and check that they are notifying the correct people.

5. Remotely authenticate users with single sign-on

The Plus+ and Enterprise versions of Zendesk support login credential validation using either Remote Authentication or Secure Assertion Markup Language (SAML). When either is enabled, users logging in to help desk are redirected to an external server for authentication and are then seamlessly redirected back to the help desk.

The advantage of using single sign-on is that you have complete control over user management and authentication.

An administrator can set up single sign-on by selecting **Settings > Security > Authentication > Single Sign-on**. For more information about Zendesk Remote Authentication, see *Remote Authentication*. For more information about using SAML, see *Introducing SAML for Zendesk*.

6. Restrict access to your help desk using IP restrictions

In the Enterprise version of Zendesk, access to your help desk can be restricted to specific IP addresses. This means that only users from the IP addresses that you manually add to your account are allowed to log in to the help desk.

This can be applied to all users or just to agents. If you select agents only, this means that agent access is restricted and end-user access is not.

An administrator can set IP restrictions by selecting **Settings > Security > Access Restriction**. For more information about this feature, see *Restricting access to your help desk*.

7. Turn SSL on for your account

Zendesk can be configured to use Secure Socket Layer (SSL), a cryptographic protocol that provides secure communications over the Internet. By using SSL, all sessions to your help desk are encrypted and customers are directed to a secure HTTPS site, e.g. https://youraccount.zendesk.com.

By default, SSL is on for new accounts. If you're not currently using SSL and want to, an administrator can enable SSL by selecting **Settings > Security > SSL**. You can use either Regular SSL or a Hosted SSL for your custom domain. How you set up SSL depends on how your account is configured. You should contact a Zendesk support agent for more information and assistance with setting this up.

By following the best practices listed in this document, you will reduce the risk of a security breach. However, even the best security policies will fall short if they are not followed. Zendesk strongly recommends that agents and administrators be trained to follow the best practices and ensure a secure environment.

Chapter

3

Managing people

- *Adding and managing users*
- *Bulk importing users and organizations*
- *Creating, managing, and using groups*
- *Creating, managing, and using organizations*
- *Adding tags to users and organizations*
- *Creating agent display names*

Adding and managing users

Users can be added to the help desk manually one at a time, through a bulk import of users, through the Zendesk API, and also as new users submit requests for the first time.

Once users have been added to the help desk, you can organize them and manage the workflow using groups and organizations. See *About organizations and groups*.

For more information about adding users with the Zendesk API, see *Zendesk REST API: Introduction*.

Adding end-users

Admins can add other admins, agents, and end-users. Agents can only add end-users.

To add an end-user
1. Select **Manage > People > Add User**.
2. Enter the end-user's profile information (email address, phone number, etc.).
3. If you use organizations and want to add this end-user to one, select the organization from the drop-down list. If you've set up email mapping, which automatically adds new users to an organization based on their email domain, you can leave this blank.
4. Optionally, enter tags. For more information about user tags, see *Adding tags to users and organizations*.
5. In the **Role - privileges granted to this user** section, select **End-user**.
6. Set the end-user's access to one of the following:
   - Tickets requested by user only
   - Tickets from user's organization (see *Shared organization for end-users* in *Creating, managing, and using organizations*).
7. Click **Create**.

Immediately after you've added the new end-user, they receive a welcome email that contains a verification link that prompts them to choose a password and log in to the help desk for the first time.

Users can also be added in a bulk import. See *Bulk importing users and organizations*.

Adding agents

Admins can add agents. For information about the agent's role in the help desk, see *Understanding help desk user roles*.

To add an agent
1. Select **Manage > People > Add User**.
2. Enter the agent's profile information (email address, phone number, etc.).
3. Optionally, add the agent to an organization.
4. In the **Role - privileges granted to this user** section, select **Agent**.
5. Set the agents groups and privileges (described below).
6. Click **Create**.

The new agent receives the welcome email and verification link and can choose a password and log in for the first time.

Users can also be added in a bulk import. See *Bulk importing users and organizations*.

Setting agent privileges, defining ticket access

When you add agents you need to define their privileges (groups they will be assigned to, their access to tickets, if they can make both public and private comments, and if they can moderate forums). These privileges are described in the following table:

Table 1: Agent privileges

Privileges	Description
Groups	This is the list of groups in your help desk. You can select one or more. Agents must be added to at least one group.
Has access to	An agent's access to tickets can be defined with the following options: • All tickets (can also add, modify and assume end-users) • Tickets within this agent's groups(s) • Tickets requested by users in this agent's organization (also can't see forums restricted to other organizations) • Tickets assigned to this agent only **Note:** If you select to restrict the agent to an organization, you must also set the agent's organization (an option on the **Add User** page). See *Restricting an agent to one organization* in *Creating, managing, and using organizations*.
Can add ticket comments that are	You can limit an agent to making both public and private comments on tickets. • Public or private • Private only (viewable only by other agents) You might use the Private only option as a way to gather information about the issue from a subject matter expert within your own company who is not interacting with customers as an agent (for example, a software developer or a product manager). You assign the ticket to that person and they can add private comments that help you to explain and resolve the issue.
Can moderate (edit, delete and reorder) topics in forums	Yes or no. Some help desks assign only a few agents to moderate the forums. These agents are set to 'yes', the others are set to 'no'.

Adding admins

Only admins can add other admins. For information about the admin's role in the help desk, see *Understanding help desk user roles*.

To add an admin

1. Select **Manage > People > Add User**.
2. Enter the end-user's profile information (email address, phone number, etc.).

3. Optionally, add the admin to an organization.
4. In the **Role - privileges granted to this user** section, select **Admin**.
5. Set the admin's groups.
6. Click **Create**.

Admins can do just about everything in the help desk (they don't have the privileges the account owner does) so there's no need to set their privileges as you would for an agent.

Users can also be added in a bulk import. See *Bulk importing users and organizations*.

Promoting an agent to the admin role

Admins can also promote agents to the admin role.

To promote an agent to the admin role

1. Select **Manage > People > Agents**.
2. Select an agent and click **Edit**.
3. Change their role to admin by selecting **Admin**.
4. Click **Update**.

The agent's existing group assignments remain; you can add or remove them from groups as needed.

Assigning an admin to account owner

Only the account owner can promote an admin to the account owner role. For information about the account owner's role in the help desk, see *Understanding help desk user roles*.

To promote an admin to account owner

1. Select **Settings > Account > Invoices**.
2. Select an admin from the **Account Owner** drop-down list. You must have at least one other admin in your help desk to see the list.
3. Click **Save Tab**.

By setting another admin to the account owner role, the previous account owner loses access to all subscription related pages such as this **Invoices** tab and the **Benchmark** tab.

How end-users add themselves to the help desk

Users can be added to the help desk simply by submitting a request. The request becomes a ticket and they are added as new end-users and are identified by their email address.

If your help desk requires end-users to register, a first time requester receives a welcome email with a verification link that prompts them to enter a password and log in. Doing this verifies them as end-users in your help desk. They get full use of the Web portal (Home page, knowledge base and community forums, new request page, and a view of their tickets).

If your help desk does not require end-users to log in (for example, if you run an email only help desk), they won't receive the welcome email. These end-users track their requests and communicate with agents using email. For more information about supporting unregistered end-users, see *Setting up an email-only help desk*.

Users can also submit requests using Twitter, which also adds them to the help desk. The user's Twitter ID is the account identifier. Any other relevant help desk user profile information that can be pulled from their Twitter profile, such as their name, is added to the user's profile.

If the Twitter requester is already registered in the help desk and their Twitter account has been added to their help desk profile, they are recognized as a registered user. If their Twitter account has not been added to their profile, a duplicate user account is created. The duplicate account can be merged into their original account. See *Merging a user's duplicate account*.

Editing and deleting users

All registered users can update their own profiles. Restrictions are only placed on the role and privileges settings. End-users cannot change their role or the organization they belong to. Agents can change their organization but not their group assignments. Admins can change everything for everyone except the account owner.

Deleting users can be done by agents and admins. Agents can delete end-users and admins can delete all users (except for the account owner). You cannot delete end-users that have tickets that are not closed. This also applies to admins and agents. If they are requesters on tickets that aren't closed, you can't delete them. When you delete an admin or agent, all of the tickets they are assigned to become unassigned.

Multiple email addresses for user accounts

A user account can contain multiple email addresses. You can add them in the user's profile (select the Identities tab).

One email address is set as the primary, which means that notifications are sent to that address. You can change the primary email address to any of the other email addresses.

Each time you add an email address, a verification email is sent to that address and must be confirmed before the email address is valid.

Merging a user's duplicate account

Since end-users can submit requests using different email addresses and via Twitter, duplicate end-user accounts can be created in the help desk.

The user profile allows you to enter multiple email addresses for a user and then set one as primary, which means that regardless of the email address they use to submit a request, they are properly identified by the help desk and a new user account is not created.

A duplicate user account can also be created if the end-user submits a request via Twitter and their Twitter account has not been added to their user profile.

To handle multiple accounts for the same end-user, you can merge one end-user account into another end-user account. You can only merge registered (verified) end-users. Admin and agent user accounts cannot be merged.

Note: If your account uses single sign-on and handles user authentication with Remote Authentication or SAML, the merge users option is not available. This is because the user accounts are managed outside of Zendesk.

To merge a user's duplicate account

1. Select **Manage > People** and select a user.
2. On the user's dashboard page select **Merge**. The merge tool appears.
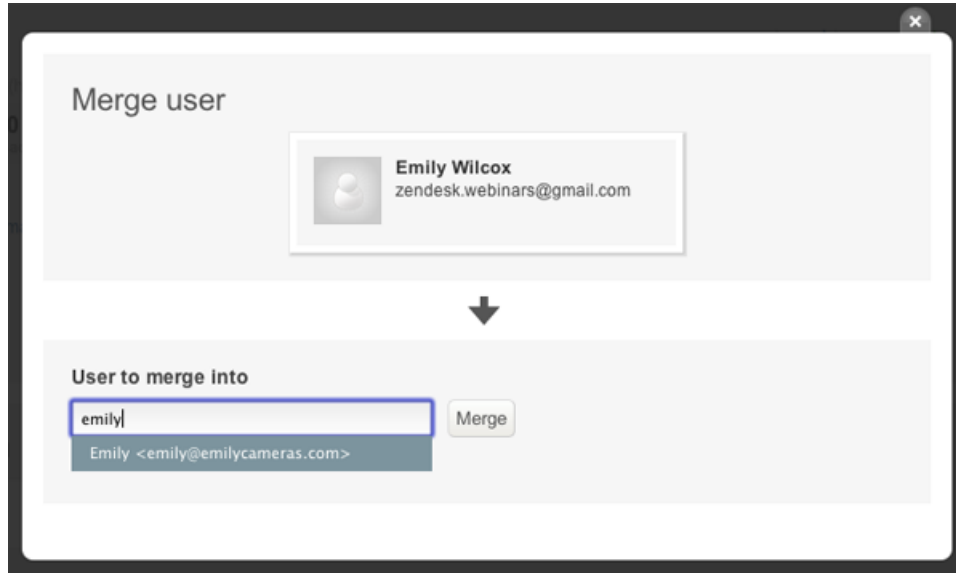
3. Enter the user's name and all users that match what you entered are displayed. Select the correct user and then click **Merge**.
4. You'll be prompted to confirm the merge. Click **Confirm and Merge**.

   Note: A merge cannot be undone, so be careful to select the correct user accounts.

After merging accounts, any tickets created by the duplicate (now merged) account are updated with the primary user account.

Assuming a user

Admins have the ability to log in as another user. This is referred to as assuming a user and it can be useful in troubleshooting issues users are having with the help desk.

To assume (log in) as another user

1. Select **Manage > People**.
2. Search for the user you want to assume; or select the **Admins**, **Agents**, or **End-users** categories and locate the user.
3. Click **Assume**. You are immediately logged in as the user and can navigate around their help desk as needed.
4. When you're done, click **Revert Identity** (this command is in the upper right corner of the help desk, near the **Profile** and **Logout** commands).

Keep in mind that while you're assuming a user any tickets you create or update (with a comment for example) appear to have been done by that user since you're logged in as that user.

Assuming an anonymous user

You can also assume an anonymous user. This essentially means that you'll see the help desk from the perspective of an end-user who has not logged in. This can be useful as a quick way of checking your help desk customizations. For example, you can see which forums in your knowledge base are public, confirm that you've set up a dropbox properly, and take a look at the submit form after you've modified ticket fields.

To assume an anonymous user

1. Select **Manage > People**.
2. Click **Anonymous user** (in the right side column).
3. When you're done, click **Revert Identity** (this command is in the upper right corner of the help desk, near the **Login** and **Sign up** commands).

Suspending a user

Users can be suspended, which means that they are no longer able to log in to the help desk and any new support requests you receive from the user are sent to the suspended tickets queue. This can be done by either marking tickets as spam, which deletes the ticket and suspends the user at the same time, or by marking the user as suspended in their user profile. Agents can suspend end-users and admins can suspend both end-users and agents.

Users are not notified that they have been suspended, they simply cannot log in to the help desk.

You can unsuspend users, which restores their previous log in credentials and access to the help desk.

To mark a ticket as spam and suspend the requester

1. Select the ticket you want to mark as spam.
2. Update the ticket by selecting **Mark as spam and suspend requester**.
3. Click **Submit**.

Note: Remember that doing this deletes the ticket. You cannot retrieve it. The suspended requester's other tickets, if any, are unaffected. They remain in your ticket queue and you can also mark them as spam or manually delete them.

To suspend a user

1. Select **Manage > People** and locate the user you want to suspend.
2. Click the user's name.
3. Select **Actions > Suspend Access**.

The user is now suspended and flagged as such in the help desk. They can no longer log in to the help desk. Any new support requests received from the user's registered identities (email addresses, Twitter, etc.) are added to the suspended tickets queue. You can manually release or delete their suspended tickets.

To unsuspend a user, follow the steps above and select **Actions > Unsuspend Access**.

Bulk importing users and organizations

Rather than add users manually one at a time, you can add many users in a bulk import. To do this, you create a CSV (comma separated values) file that contains the user's data. Aside from the essential user data, such as email address and phone number, you can set user roles, define an agent's privileges, and add users to an organization.

You can use bulk import to add new users, replace existing user information data, add organizations, or replace existing organization data.

Only admins can bulk import users and organizations, not agents.

Limitations of bulk importing users and organizations

You can import a core set of data about users and organizations. For example, using bulk import, you can import the user data described in the table below (*Creating the CSV user import data file*); however you cannot import the user's time zone, or photo, or language preference, etc. To import that data, you need to use the Zendesk REST API instead (see *Zendesk REST API: Introduction*).

There are also the following limitations to bulk importing:
- The import CSV data file must contain no more than 2000 rows of data (one row for the header and the rest for the user or organization data).
- You can only import one CSV file of 2000 or less rows of data per hour. Imports are queued and run once an hour. Therefore, if you've got more than 1999 users to import, you need to create separate files for each batch and import them hours apart.

Creating the CSV organization data file

If you use organizations in your help desk, you can bulk import a list of organizations using a CSV file. You must import the organizations before you import the users that will be added to them.

The first row of the file is the header row and contains the fields listed in the table below. You must include the header row, using all the fields and in the order they are listed below, even if you're not importing that data into the help desk. In other words, you can have empty columns of data, but you must include all the header row fields.

The file must be properly formatted CSV and saved using UTF-8 character encoding.

The following table lists the fields that you can include in the file.

Table 2: Organization import data

Field	Description
name	Required. The organization name.
notes	Notes about the organization. Notes are visible to agents only, not to end-users.
details	Detailed information about the organization, such as the address. This information is visible to agents only, not to end-users.
default	This is for mapping users to an organization. Enter one or more email domains, separated with spaces.

Field	Description
	See *Automatically adding users to organizations based on their email domain* in *Creating, managing, and using organizations*.
shared	True or False. Sets the organization as a shared organization.
	See *Shared organization for end-users* in *Creating, managing, and using organizations*.
shared_comments	True or False. Allows all users in the organization to add comments to each other's tickets. The shared field must also be set to true.
	See *Shared organization for end-users* in *Creating, managing, and using organizations*.
group	Enter a default group for the organization. See *Mapping a group to an organization* in *Creating, managing, and using organizations*.
tags	When user and organization tagging has been enabled for your help desk (see *Adding tags to users and organizations*), you can add tags to the organization. Separate each tag with the comma.

Importing the CSV organization data file

You can import new organizations or update information for existing organizations.

To import the CSV organization data

1. Select **Manage > People**.
2. Select **Bulk Organization Import** (located in the right column).
3. Choose the type of import you want:

   - Create new organizations
   - Update existing organizations

     Note: Warning! Currently, update actually means replace. In other words, if you select **Update existing organizations**, it replaces the existing data in your help desk. If you want to add some additional organization data after you've added the organizations to your help desk, your CSV file must also contain all the original data from the initial bulk import plus the new data.

4. Either click **Choose File** or the **Let me paste in data instead** link.
5. Click **Import**.

Your import is added to the queue and the organizations are added to the help desk when the import process is complete. See *Limitations of bulk importing users and organizations*. You'll receive an email when the import is complete.

Creating the CSV user data file

When you create a list of users to add to the help desk, you'll probably generate this list from some other user management system such as an Employee database. Most of these systems have some facility for creating a CSV export file. If you need to create the list from scratch you can use a program like Microsoft Excel or OpenOffice.org Calc.

The first row of the file is the header row and contains the fields listed in the table below. You must include the header row, using all the fields and in the order they are listed below, even if you're not importing that data into the help desk. In other words, you can have empty columns of data, but you must include all the header row fields.

The file must be properly formatted CSV and saved using UTF-8 character encoding.

The following table lists the fields that you can include in the file.

Table 3: User import data

Field	Description
name	User's full name.
email	Required. User's full email address (someuser@mycompany.com).
password	User's help desk password. You can leave this blank and allow the user to select their own password or you can add a default password for everyone. If you don't add a password, all new users will receive the welcome email, which prompts them to choose a password and log in to the help desk. The password must be in clear, unencrypted text. You can also add users via remote authentication or SAML, both of which allow encrypted passwords. **Note:** The password must comply with the password security setting of your account (Low, Medium, or High). See **Settings > Security > Password Policy**.
external_id	If you have an ID other than the user's email address (such as an employee ID or customer reference number), you can include it here.
details	Detailed information concerning this user, e.g. an address. This information is visible to agents only, not to end-users.
notes	Notes concerning this user. Notes are visible to agents only, not to end-users.
phone	The user's telephone number.
role	End-user, agent, or admin. If you don't set a role, the user is set to end-user.
restriction	Required when the user's role is set to agent. Restriction sets the agent's privileges, the tickets they have access to, etc. You can enter one of the following values: • **assigned**, which means tickets assigned to this agent only • **groups**, which means tickets within this agent's groups(s) • **none**, which means that they have no restriction and can access all tickets • **organization**, which means tickets requested by users in this agent's organization • **requested**, which means their own tickets (the agent is the requester)

Field	Description
	In the Enterprise version of Zendesk, you use the restriction field to assign your agent users predefined or custom roles. See *Assigning an agent to an Enterprise agent role* below.
organization	The name of the organization that the user will be added to. The organization must already exist or the import will fail.
tags	When user and organization tagging has been enabled for your help desk (see *Adding tags to users and organizations*), you can add user tags. Separate each tag with the comma.

Assigning an agent to an Enterprise agent role

In the Enterprise version of Zendesk, you can assign your agent users predefined or custom roles (see *Custom agent roles*). These roles are sets of permissions, not just single permissions as are the standard restrictions listed in the table above.

To set a custom agent role, you set the user's role to agent and then use the name of the role as the restriction value. For example, you can set an agent to any of the following five predefined agent roles:

- Administrator
- Advisor
- Light Agent
- Staff
- Team Leader

If you've created your own custom agent roles, you just use the name of your custom role. As an example, here's a CSV example for setting an agent to a role called Help Desk Mastermind.

```
"name","email","password","external_id","details","notes","phone","role",
"restriction","organization","tags"
Enrico Venticello,"venticello@somecompany.com",,,,,,"agent","Help Desk
 Mastermind",,
```

If you accidentally use a role that doesn't exist in your help desk, the agent is set to Light Agent. You can then manually change the agent's role to another role by editing their user profile.

Note: In the Enterprise version of Zendesk, agent roles override the standard agent restrictions. This means that you can't use any of the standard restrictions listed in the table above. You must use an agent role. If you try to import or update an agent user with the standard restrictions (for example, "assigned"), the agent is set to Light Agent.

Also, the import is case insensitive, which means that both of following custom role names set the agent to the same role: "Help Desk Mastermind" and "help DEsk mastermind".

Importing the CSV user data file

You can import new users or update information for existing users.

To import the CSV user data

1. Select **Manage > People**.
2. Select **Bulk User Import** (located in the right column).

3. Choose the type of import you want:

   - Create new users
   - Update existing users

     Note: Warning! Currently, update actually means replace. In other words, if you select **Update existing users**, it replaces the existing data in your help desk. If you want to add some additional user data after you've added the users to your help desk, your CSV file must also contain all the original data from the initial bulk import plus the new data.

4. Either click **Choose File** or the **Let me paste in data instead** link.
5. Click **Import**.

Note: Unless you added passwords in the CSV file, a welcome email is sent to every new user, which prompts them to choose a password and log in to the help desk.

Your import is added to the queue and the users are added to the help desk when the import process is complete. See *Limitations of bulk importing users and organizations*. You'll receive an email when the import is complete.

Creating, managing, and using groups

As described in *About organizations and groups*, how you set up your groups depends on how you want to define your workflow and organize your agents. All agents must be added to at least one group. Admins can add and edit groups, agents cannot.

To create a group
1. Select **Manage > People > Add Group**.
2. Enter a group name.
3. Select the agents you want to add to the group.
4. Click **Create Group**.

Admins can view and manage all groups by selecting **Manage > People > Groups** and can add and remove agents as needed.

Editing and deleting groups

Editing a group means simply adding or removing agents from it.

Groups can also be deleted (the delete command is available when editing a group). Deleting a group has implications of course. The agents you assigned to it will no longer be (since it doesn't exist anymore) and the group will be removed from any tickets it was assigned to. Any business rules or reports you set up using the group you deleted will no longer function properly.

Adding agents to groups

You can add agents to groups at the time you create the group. You can also add new agents to one or more groups when you add them to your help desk. Only admins can add new agents.

To add a new agent to a group
1. Select **Manage > People > Add User**.
2. Enter information about the new user.
3. In the section called **Role - privileges granted to this user**, select **Agent**.
4. All of your groups are displayed. Select one or more.
5. Set the agent's other privileges (described below).
6. Click **Create**.

You can change the agent's group assignments at any time by editing their profile. Agents cannot change their own group assignments.

Setting agent privileges, defining ticket access

When you add agents you need to define their privileges (groups they will be assigned to, their access to tickets, if they can make both public and private comments, and if they can moderate forums). These privileges are described in the following table:

Table 4: Agent privileges

Privileges	Description
Groups	This is the list of groups in your help desk. You can select one or more. Agents must be added to at least one group.
Has access to	An agent's access to tickets can be defined with the following options:

Privileges	Description
	• All tickets (can also add, modify and assume end-users)
	• Tickets within this agent's groups(s)
	• Tickets requested by users in this agent's organization (also can't see forums restricted to other organizations)
	• Tickets assigned to this agent only
	Note: If you select to restrict the agent to an organization, you must also set the agent's organization (an option on the **Add User** page). See *Restricting an agent to one organization* in *Creating, managing, and using organizations*.
Can add ticket comments that are	You can limit an agent to making both public and private comments on tickets.
	• Public or private
	• Private only (viewable only by other agents)
	You might use the Private only option as a way to gather information about the issue from a subject matter expert within your own company who is not interacting with customers as an agent (for example, a software developer or a product manager). You assign the ticket to that person and they can add private comments that help you to explain and resolve the issue.
Can moderate (edit, delete and reorder) topics in forums	Yes or no.
	Some help desks assign only a few agents to moderate the forums. These agents are set to 'yes', the others are set to 'no'.

Assigning tickets to groups

Agents can assign tickets (manually or via a macro) to any of the groups they belong to. Admins can assign tickets to any group in the help desk.

Tickets can also be automatically assigned to groups using business rules (see *Using groups in business rules* (below) and by enabling group mapping for an organization. Automatically assigning a group to an organization's tickets is a relationship you set up when creating or editing an organization. See *Mapping a group to an organization* in *Creating, managing, and using organizations*.

Using groups in business rules

Groups can be used in automations, macros, and triggers. When creating automations and triggers you can use group as a criterion for making updates to tickets. Using a macro, you can assign a group to tickets as an action.

There are many reasons that you might include group in an automation or trigger. Here are several examples of how they are commonly used.

Example: Escalating tickets using group in an automation

In an automation, you can use group as a condition to escalate tickets for a specific group.

The Level 2 support team provides a higher level of service to their customers and promises to solve tickets quickly; this is their service level agreement. This automation helps them manage this commitment by reminding them if their tickets are not updated after 48 hours.

The actions in this automation set the priority to urgent and send an email to the ticket assignee as a reminder to update the ticket. For more information about creating automations, see *Streamlining workflow with time-based events and automations*.

Example: Notifying a group of a ticket assignment with a trigger

Perhaps the most common use of groups in a trigger is to notify a group when a ticket has been assigned to the group (it's one of the default triggers in Zendesk). You can take a look at this trigger in your help desk by selecting **Manage > Triggers and mail notifications**, locating the **Notify group of assignment** trigger, and then selecting **Edit**.

Trigger title

Notify group of assignment

Meet all of the following conditions:

Group	Changed		
Group	Is not	–	
Assignee	Is	–	

Add condition

This trigger fires when a group is assigned to a ticket. The change event could have been triggered manually by an agent or automatically by another business rule (automation or trigger).

Perform these actions:

Email group   (assigned group)

Email subject:

[{{ticket.account}}] "{{ticket.group.name}}" assignment: {{ticket.title}}

Email body:

This ticket (#{{ticket.id}}) has been assigned to group '{{ticket.group.name}}', of which you are a member.

To review the status of the ticket, follow the link below:
http://{{ticket.url}}

{{ticket.comments_formatted}}

View available placeholders »

Add action

The actions inform everyone in the group about the new ticket assignment. For more information about triggers, see *Streamlining workflow with ticket updates and triggers*.

Example: Assigning a group to a ticket using a trigger

Group can be used as a condition in a trigger, which allows you to filter incoming requests and assign them to the appropriate group.

Trigger title

Route sales inquiry to Sales

Meet all of the following conditions:

Ticket is...	Created
Status	Is not	Solved
Ticket received at...	sales	@mondocam.zendesk.com

Add condition

In this example, the conditions are used to determine if the ticket is a sales inquiry.

Perform these actions:

| Type | Question |
| Group | Sales |

Add action

The actions set the type to Question and then assign the ticket to the Sales group. This example also illustrates that you can extend the use of the help desk to other areas of your business, not just the support agents. For more information about triggers, see *Streamlining workflow with ticket updates and triggers*.

Creating views and reports by group

Your groups can be used to create views and reports. Here are several examples.

Example: Creating a view of tickets by group

One of the default views in Zendesk shows you all the tickets that have been assigned to the groups you belong to. You can take a look at this view in your help desk by selecting **Manage > Views > Shared**, locating the **Unsolved tickets in your groups** view, and then selecting **Edit**.

View title

Unsolved tickets in your groups

Meet all of the following conditions:

| Status | Less than | Solved |
| Group | Is | (current user's groups) |

Add condition

This view displays unsolved tickets that are assigned to the current user's (your) groups. You could of course select one or more specific groups instead if you were to customize this view.

This is the result, formatted as a table. The tickets are listed by groups.

Example: Creating a report of ticket activity by group

Here's an example of a report that displays the tickets assigned to a group that remain unsolved after 48 business hours.

The **Requester wait time in hours** condition is the combined time that a ticket is in the New and Open states.

Creating, managing, and using organizations

As described in *About organizations and groups*, how you set up your organizations depends on how you want to define your workflow and organize your users (both end-users and agents). Users can be added to one organization. Admins can add and edit organizations, agents cannot.

To create an organization

1. Select **Manage > People > Add Organization**.
2. Enter the organization name.
3. Optionally, enter tags and detailed information and notes. For more information about organization tags, see *Adding tags to users and organizations*.
4. You can also set up user mapping (see *Automatically adding users to organizations based on their email domain*), set up group mapping (see *Mapping a group to an organization*, and enable the organization as a shared organization (see *Shared organization for end-users*).
5. Click **Update Organization**.

Admins can view and manage all organizations by selecting **Manage > People > Organizations**.

Automatically adding users to organizations based on their email domain

Users can be automatically added to an organization based on their email domain when they submit a request for the first time or otherwise register with the help desk. This is referred to as *user mapping* and an admin can set this up by editing an organization's settings.

To set up user mapping for an organization

1. Select **Manage > People > Organizations**.
2. Select an organization and then click **Edit**.
3. In the **Map users to organization** option, enter the email domain(s). Separate the domains with a space (for example: domain1.com domain2.com).
4. Click **Update Organization**.

Note: If you've added email domains to the whitelist (**Settings > End-users**), these domains will be automatically included in the list. Although whitelisted domains are included, they are not shown on this organization settings page.

Mapping a group to an organization

An organization's tickets can be automatically assigned to a group. This is referred to as *group mapping* and can be set up by an admin.

To set up group mapping for an organization

1. Select **Manage > People > Organizations**.
2. Select an organization and then click **Edit**.
3. Under the **Map organization to group** option, select one group from the drop-down list.
4. Click **Update Organization**.

New tickets will now automatically be assigned to the selected group; however, business rules and agents may override this default group setting.

Shared organization for end-users

You have the option of allowing all of the end-users in an organization to see each other's tickets and to also make comments on them. This is referred to as a *shared organization*. This can be set up by an admin.

To set up a shared organization

1. Select **Manage > People > Organizations**.
2. Select an organization and then click **Edit**.
3. Select the **Shared organization for end-users?** option.
4. You can also allow end-users to add comments to the shared organization tickets by selecting **End-users in organization can add comments to all tickets in the organization?** option.
5. Click **Update Organization**.

Instead of allowing all end-users in an organization to see and comment on an organization's tickets, you can grant this privilege to select end-users. You set this up in the user's profile.

To allow individual end-users access to an organization's tickets

1. Select **Manage > People > End-users**.
2. Select an end-user and then click **Edit**.
3. Under **Role - privileges granted to this user** set the access privilege to **Tickets from user's organization**.
4. Click **Update**.

Editing and deleting organizations

You can edit an organization's settings by selecting it from your list of organizations and then clicking **Edit**.

You can also delete your organizations (the delete command is available when editing a group). When you do, the users you assigned to it will no longer be (since it doesn't exist anymore) and the organization will be removed from any tickets it was assigned to. Any business rules or reports you set up using the organization you deleted will no longer function properly.

Manually adding users to organizations

You can add users to an organization at the time they are added to the help desk or later by editing their profile. You can also include users' organizations when importing new users into the help desk in a bulk import operation.

To add a user to an organization

1. Select **Manage > People > End-users** (or **Admins**, or **Agents**).
2. Select a user and then click **Edit**.
3. Select an organization from the drop-down list under **Organization**.
4. Click **Update**.

You can change the user's organization at any time by editing their profile. End-users cannot change their own organization (admins and agents can).

Restricting an agent to one organization

One of the options you have for managing the ticket workflow and controlling the access agents have to tickets is to add them directly to an organization and then restrict their access privileges to that organization.

To restrict an agent to an organization

1. Select **Manage > People > Agents**.
2. Select an agent and then click **Edit**.
3. Select an organization from the drop-down list under **Organization**.
4. In the section called **Role - privileges granted to this user**, set their access to **Tickets requested by users in this agent's organization**.
5. Click **Update**.

Regardless of the groups they belong to, they will only have access to the organization's tickets.

Creating views and reports by organization

Organizations can be used when creating views and reports (as well as business rules). Here are several examples.

Example: Creating a view of tickets by organization

A common use for organizations in a view is to monitor ticket activity.

This view displays unsolved tickets that are assigned to an organization called Customers.

Example: Creating a report of ticket activity by organization

Here's an example of a report that displays all ticket activity for several organizations.

Report title

Ticket activity by organization

Reporting period

⊙ Relative to today ○ Fixed date interval

Last week ⬍

Data series

Camera Wholesalers Inc.   Remove

All tickets ⬍

Organization ⬍   Is ⬍   Camera Wholesalers Inc. ⬍   ⊟

Add condition   ⊞

MondoCAM   Remove

All tickets ⬍

Organization ⬍   Is ⬍   MondoCAM ⬍   ⊟

Add condition   ⊞

Adding tags to users and organizations

Tags can be added to users and organizations and these tags can then be used in business rules to manage the ticket workflow and to restrict access to forums.

Tagging users and organizations provides you with a way to add more data about each and then act on that data. For example, you can tag an organization or a user and then add the tag to a trigger to escalate the ticket to a specific support group.

A user's tags, and the tags of the organization to which they belong, are added to their tickets. In other words, if a user is tagged with `manager` and belongs to an organization tagged with `premium`, all the user's tickets will contain both of those tags.

Tags can also be used to restrict access to forums. You can first restrict access to a single organization and then to users within that organization based on tags. Or, if you don't select a specific organization, access can be restricted to all the users and organizations in your help desk that have the specified tags (in other words, multiple users from multiple organizations).

You can add tags manually when adding or editing users and organizations, during a bulk import, and via the Zendesk API, Remote Authentication, and SAML. Agents and admins can add tags to users, but only admins can add tags to organizations.
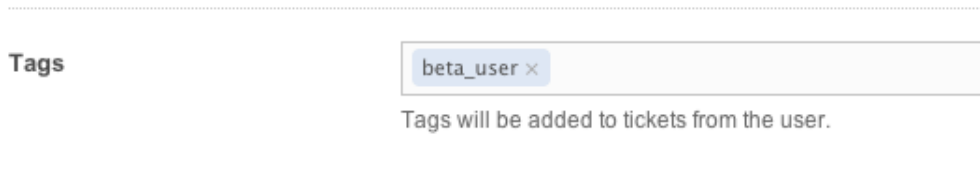
The user and organization tags are displayed in the help desk in the user dashboard, the user widget, and in lists of users and organizations.
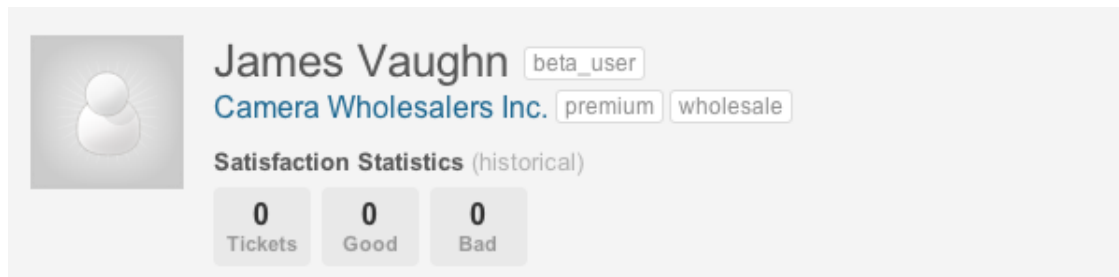
Tags can be managed by selecting **Manage > People > Tags**. On this page you can see all the tags and how many times they've been added to users and organizations. You can also remove the tags from all the users and organizations to which the tags have been added.
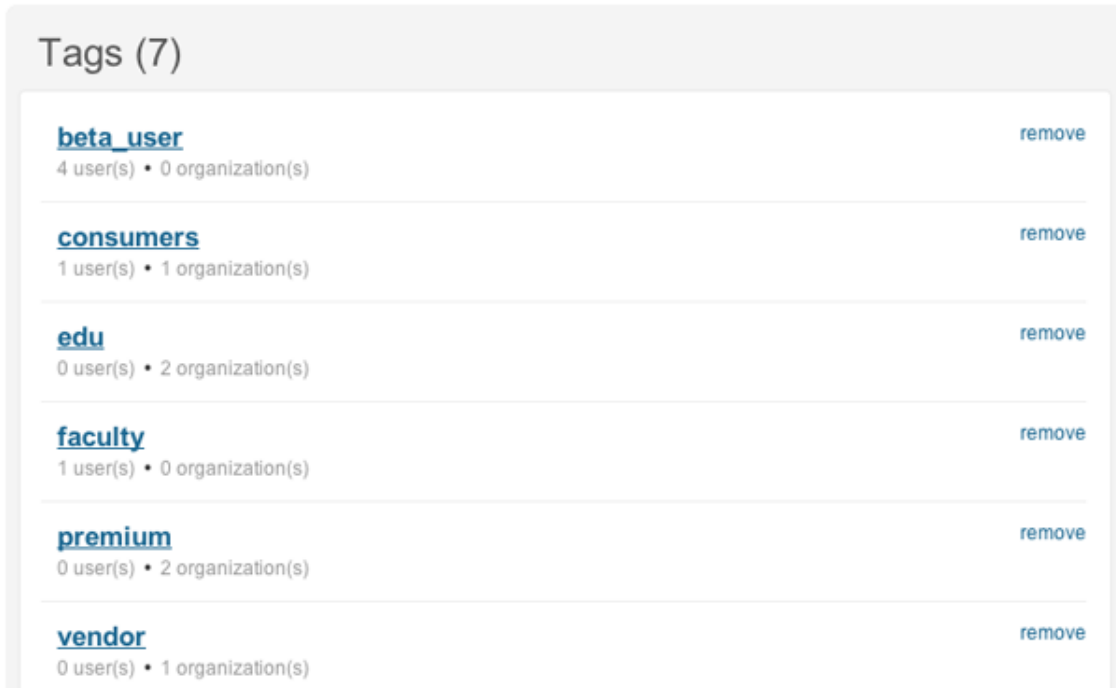
User and organization tags can be referenced as placeholders and as data in Liquid markup code.

Enabling user and organization tagging

An admin can enable user and organization tagging for the help desk.

To enable user and organization tagging

1. Select **Settings > End-users**.
2. In the section **Tags on users and organizations**, click **Enabled**.
3. Click **Save Tab**.

Note: If you want to add tags during a bulk import or via the Zendesk API, Remote Authentication, or SAML, you also must first enable this setting.

Adding tags

Tags can be added when manually adding or editing users and organizations, when bulk importing user and organization data, and via the Zendesk API, Remote Authentication, and SAML.

In the help desk, you add tags in the user's profile page and in the organization settings page.
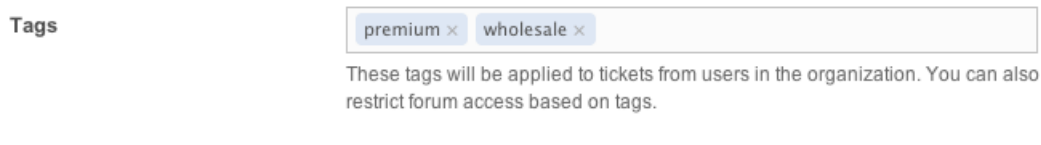
The tags are added to new tickets submitted after this feature has been enabled, not retroactively to a user's existing tickets. Also, these tags are only added when tickets are created, not when they're updated.

Note: If you change a ticket's requester to another user, the original requester's tags are removed and the new requester's tags are added.

For information about adding tags during bulk imports, see *Bulk importing users and organizations*.

For information about working with user and organization tags via the Zendesk API, see *REST API: Users* and *REST API: Organizations*.

Managing user and organization tags

You can manage user and organization tags by selecting **Manage > People > Tags**. The **Tags** page displays all the user and organization tags that have been added to your help desk. Clicking a tag displays a list of the users and organizations to which the tags have been added.

Note: This page only displays user and organization tags, not the other help desk tags that were added to tickets and forum topics.

Aside from providing you with the details of how the tags are being used, you can also remove tags from all the users and organizations to which they have been added.

To remove tags from users and organizations

1. Select **Manage > People > Tags**.
2. Locate the tag you want to remove and then click **Remove**.
3. Confirm that you want to remove the tag and then click **OK**.

Note: Removing user and organization tags does not remove them from the tickets they have been added to. You can delete the tags from those tickets manually or just manage them out of the help desk as the tickets are closed.

User and organization tags in business rules

Since a user's tags (including their organization's tags) are added to their tickets, you can use these tags in business rules to automatically make changes to the ticket. For example, based on a user or organization tag, you can automatically assign tickets to a specific group, as in the following example.

These tags can of course be used in any business rules (automations, macros, triggers, and views) as well as reports.

User and organization tag placeholders

User and organization tags are available as placeholders. They are properties of the User and Organization data objects and can therefore be referenced as user properties. For example:

```
{{ticket.requester.organization.tags}}
```

```
{{ticket.assignee.tags}}
```

For more information, See *Zendesk data object (placeholders) reference*.

Limiting access to forums with user and organization tags

User and organization tags can be used to restrict end-user access to forums.

To restrict access to a forum with tags

1. Select the forum you want to restrict access to and click **Edit**.
2. In the section **User property restrictions**, enter the tags of the organizations and users that will be allowed to access the forum.

3. Click **Update Forum**.

Only these users and organizations will see the forum when they are logged in to the help desk Web portal. In the example above, all of the help desk users and organizations that have been tagged with `premium` have access to the forum because no specific organization was selected.

Note: If you use more than one tag, for users and organizations to have access, they must also have all of the tags you've entered.

Searching for user and organization tags

You can always search for tags using the `tags` keyword, as in this example:

```
tags:premium
```

This search returns the tag 'premium' wherever it's been used in the help desk, including in ticket details and in the forums.

Using the `type` keyword, you can narrow your search results to tickets that contain the tag.

```
type:ticket tags:premium
```

A search like this returns all tags (not just user or organization tags). There's currently no way to search for user and organization tags within a ticket separate from other tags that have been added to the ticket (via custom fields, auto tagging, business rules, or manually by an agent). You can of course create a user and organization tag naming scheme (for example, user_*tag* and org_*tag*) and then search for those.

However, since `tags` is also a property of both the User and Organization data objects, you can narrow your search results to just those objects by using the `type` keyword.

To search for organization tags, you can use a search statement like this:

```
type:organization tags:premium
```
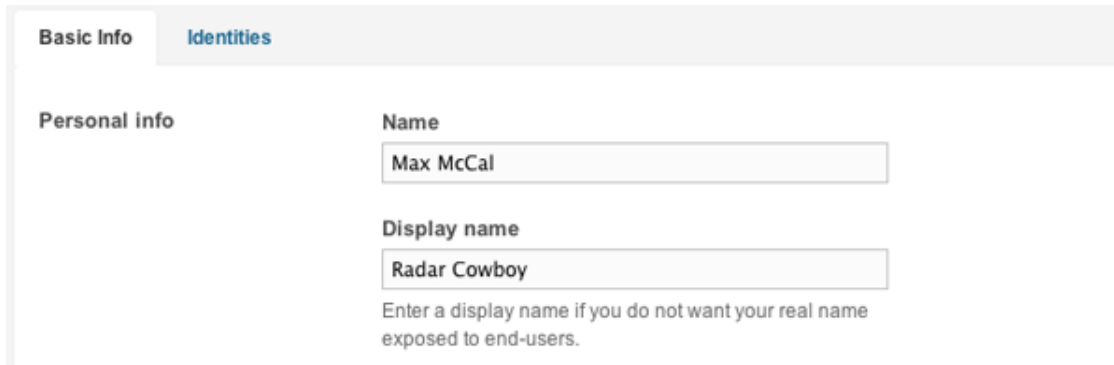
To search for user tags, you can do this:

```
type:user tags:beta_user
```

Creating agent display names

In the Plus+ and Enterprise versions of Zendesk, agents can be assigned a display name that will be used on all communications with the ticket requester. This allows agents to create a help desk persona and keep their real name private.

Admins and agents can create their own display names by editing their profiles.

The display name field is located on the user profile page.

Display names are only shown if you have also enabled personalized email replies. This is done by an admin.

To enable personalized email replies

1. Select **Settings > Channels > Email**.
2. Select **Personalized email replies > Enable**.

To add an agent display name

1. Select **Manage > People** and locate the agent you want to update.
2. Select **Edit**.
3. Enter a display name.
4. Click **Update**.

Once an agent creates a display name, it is the only name that end-users will see. It's shown as the sender on all outgoing email, it's the name end-users see when viewing the ticket details, and it's also the name that is displayed on forum posts and comments that agents add. Display names are only visible to end-users, not other agents. If you want to see how your display name appears, you can assume an end-user.

Chapter

4

Tickets and channels

About ticket fields

Typically when an end-user submits a support request, they provide the subject and description of their question or support issue. You may also prompt them to provide additional data such as a model number or product version using custom ticket fields. All other ticket fields are set by your agents or business rules (automations, macros, and triggers).

Each of the standard ticket fields (referred to as *system* fields), those that are shown on the agent's view of the ticket page, are described below.

You can manage your ticket fields by selecting **Manage > Ticket Fields**. Here you can deactivate and reactivate the system fields and add and manage your own custom fields. Additional system fields are added to the ticket page when you activate additional Zendesk features such as ticket sharing.

Note: Tickets contain other data that you can access using placeholders and the Zendesk API. For more information about this additional data, see *Ticket data*.

Requester

Required. The requester is the person who made the support request. The requester field displays the user's name and email address. Agents can create a support request for an end-user

and select the end-user's identity to enter into the requester field (for example, an agent might open a new ticket for the requester while speaking to them on the phone).

CC

If you allow it, by enabling tickets CCs (**Settings > Tickets > CCs**), other people can be CC'ed on tickets. End-users and agents can add CCs. End-users can add CCs when they create email-based support requests. Agents can add CCs using the CC field when updating the ticket.

Share

As described in *Sharing tickets between Zendesk help desks*, you can share tickets with other help desks. You must first establish sharing agreements with other help desks. Once you have, you can select a help desk to share the ticket with. This field is only displayed if you've enabled ticket sharing by selecting **Settings > Tickets > Ticket Sharing**.

Subject

Required. A short description of the support request. When an end-user submits a support request via email, the subject line of the email is used as the ticket's subject.

Description

Required. This is the description of the support request. When an end-user submits a support request via email, the body of the email request is used as the description. The description becomes the first comment in the ticket.

Status

There are five values for status: New, Open, Pending, Solved, Closed. A ticket's status can be set and updated either manually by an agent or via an action in an automation, macro, or trigger. The status can only be changed to Closed via automations and triggers (not manually).

New means that the request was received but that it has not been opened and has probably not been assigned to an agent. The New status can indicate that the support team is evaluating it to determine who should be assigned to resolve it.

Open means that the request has been assigned to an agent who is working to resolve it.

Pending means that the assigned agent has a follow-up question for the requester. The agent may need more information about the support issue. Requests that are set to Pending typically remain that way until the requester responds and provides the information the agent needs to continue resolving the request.

Solved means that the agent has resolved the support issue. Solved tickets are closed, typically, a number of days after they have been set to Solved (you can control when your tickets are closed by modifying the automation that is used to close tickets). Until a ticket is closed, the requester can reopen the ticket. For example, the requester may not agree with the agent that the support issue is resolved.

Closed means that the ticket is complete and can't be reopened. Requesters however can create follow-up requests for closed requests.

Type

There are four values for type: Question, Incident, Problem, and Task. You can also set the type to none, if you wish; it is not a required ticket field. Setting the type helps you to

categorize your tickets, which you can then use in your workflow. For example, you can create views for tickets by their type.

Question is used to indicate that the requester's issue is a question rather than a problem that needs to be solved.

Incident is used for occurrences of a problem that affects more than one person. For example, in a corporate setting, if no one was able to print a document, this is a problem that would probably result in many support requests. Instead of handling each ticket separately, you set one of the tickets to Problem and all the other tickets about the same issue to Incident. When the problem ticket is solved, all of the associated incident tickets are also solved.

Problem is used to indicate that the requester is having an issue with your product or service that needs to be resolved.

Task is used when you want to assign the ticket as a task to a specific agent. When you select Task, you also set the Task Due Date.

Note: If you deactivate the Type field, all of your tickets will default to Incident.

Priority

There are four values for priority: Low, Normal, High, and Urgent. You can also set the type to none, if you wish; it is not a required ticket field. How you weight the priority of your tickets is up to you. For example, you might assign a ticket to Urgent based on the customer who submitted the request or based on how many hours have passed since the ticket was created.

Group

A support group can be assigned to a ticket. By selecting a group, you also determine which of your agents can be assigned to the ticket. For example, if you select the Level 2 support group, you can then only assign an agent that is a member of that group.

Assignee

Required. The assignee is the agent assigned to the ticket. The assigned agent can be changed at any time. If you also assign a group to the ticket, this determines what agents can be assigned to the ticket.

Tags

Tags are used throughout the help desk to add additional information to tickets, which can then be used in your workflow (see *Using tags*). Tags can be added to tickets in the following ways:

- Agents can manually add tags to tickets. See *Manually adding tags to tickets and forum topics*.
- Tags can be added (and removed) by automations, macros, and triggers using the `add tags`, `set tags`, and `remove tags` actions. See *Using tags in macros, triggers, and automations*.
- Tags can be added automatically based on words in the subject and description. See *Automatic ticket tagging*.
- Tags can be added to users and organizations and these tags are automatically added to tickets. See *Adding tags to users and organizations*.

You can also prevent tags from being added to tickets. See *Setting tagging options*.

In addition to these system ticket fields, you can also create your own custom ticket fields. For more information, see *Adding and using custom ticket fields*.

Adding and using custom ticket fields

You can add custom fields to tickets and they can be visible to agents only or to both agents and end-users. Your visible custom fields appear on your support request form in the Web portal and in the Feedback Tab. 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 or provide you with some demographic information.

Your custom fields can be required or optional. You can make them required just for agents or for both end-users and agents. Only admins can add custom fields.

You can create the following types of custom fields:
- Drop-down list
- Text
- Multi-line text
- Numeric
- Decimal
- Checkbox
- Regular expression

The drop-down list and checkbox custom fields generate tags that can also be used in automations, macros, triggers, reports, and views (see *Custom drop-down list fields and tags*). All custom fields can be referenced as placeholders (see *Placeholders for custom fields*).
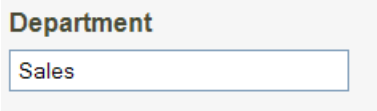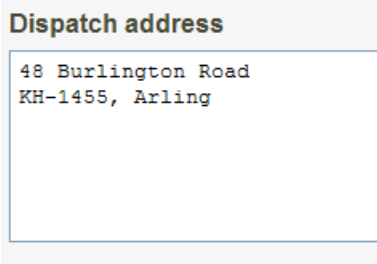
To add custom fields
1. Select **Manage > Ticket Fields**.

2. Select **Add custom field**.
3. Select one of the custom field types (see below for more information about the field types).
4. Enter a text field title and the field title that is displayed to end-users. What you enter into the first will be copied into the second but you can modify the end-user facing title if you like.
5. Set the availability of the custom field. It can be displayed to agents only or to both agents and end-users. You can also make it a required field. Set the following options as needed:
   - **Required for agents?** Select this if the field is required for the ticket to be solved.
   - **Visible to end-users?** This option allows end-users to see the field as a ticket property when they log in to the help desk and view a ticket.
   - **Editable by end-users?** Select this to include the custom field on the request form (in the Web portal and the Feedback Tab).
   - **Required for end-users?** Select this if the field is required and must not be blank to submit the request.
6. Click **Add Field**.

Table 5: Custom field types

Types	Description
Drop-down list	This field allows you to create a list of options for users to select. Each option in the custom field is a combination of a title and a tag. The title is displayed to users and the tag is used as a ticket property that can be included in triggers and other business rules. You can also organize drop-down list options into categories (see *Organizing drop-down list options*).
Text	This is a simple single line text input.
Multi-line text	This is a multiple line text input.
Numeric	This is for simple numeric input (no decimals).

Types	Description
	Age (required) Please be honest. `45`
Decimal	This is for numbers that contain decimals. **Suggested price** `299.95`
Checkbox	This is used to capture a Yes/No value. Enter a tag to be added to the ticket when the checkbox is selected. Use the tag to filter your views, triggers and automations. **Want us to call you?** ☐
Regular expression	You can enter a Ruby regular expression to create an input mask to validate proper entry of numbers in fixed patterns (telephone numbers, zip codes, social security numbers, etc). Here's a regular expression for a U.S. social security number: **\b[0-9]{3}-[0-9]{2}-[0-9]{4}\b**. This expression requires three sets of numbers (0-9 only) in a pattern of 3-2-4 and each separated by a dash. For more information about Ruby regular expressions, see *Rubular*. **Product ID** `AOPL-23ER-323T-54TY`

Organizing drop-down list options

You can create drop-down lists that contain up to three levels of organization. This is done using the same technique for organizing macros (see *Organizing your macros*).

The titles of your custom field options contain the categories and selection value separated by double colons, like this:

On the request form, the custom drop-down list looks like this:

As with drop-down list options that do not contain categories, your tags should be for the selection value.

Custom fields and tags

The drop-down list and checkbox custom fields generate tags that can be used in your business rules. Using the example above, when a MondoCam customer selects a camera model, a tag is added to ticket along with any other tags that are added by business rules or user and organization tagging.

The tag can be used as needed in your business rules. For example, you might use the tag to automatically assign the ticket to a specific support group. For an example of how to use tags in business rules, see *Using tags in macros, triggers, and automations*.

The custom fields tags are also available as conditions and actions in business rules, which means that you can directly access the custom fields in your business rules rather than having to access them using the Tags action or condition.
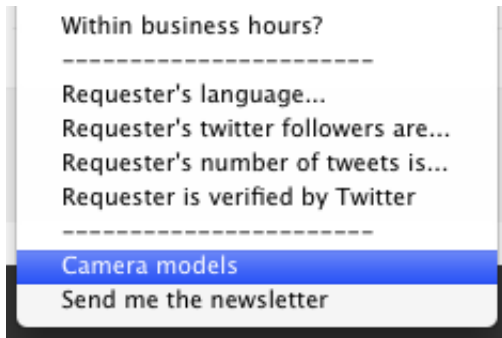
Sharing tickets between Zendesk help desks

You can share tickets from your help desk with other help desks. And, those other help desks can share their tickets with your help desk. You establish sharing agreements with other help desks and specify the terms under which sharing can occur, how shared tickets are managed between help desks.

Ticket sharing allows you to assign tickets to affiliated help desks and their agents either provide information toward resolving the issue or solve the issue themselves. The ticket status and comments can stay synced between the tickets in each help desk.

Here's how ticket sharing works:
- Any help desk can invite another help desk to establish a sharing agreement.
- The initiating help desk (referred to as the sender) sets the terms of the sharing agreement, which the receiving help desk can accept or not.
- Sharing agreements are one way. Once the receiver accepts the agreement, the sender may share tickets with the receiver. For the receiver to share tickets with the sender, they must create and initiate a sharing relationship with the other help desk.
- The sender can only share a ticket with one other help desk. However, the receiver can share the ticket with a help desk that they have a sharing agreement with.
- A shared ticket becomes a new ticket in the receiver's help desk with a separate ticket ID.
- The ticket status, custom fields, and comments can remain synced between the ticket versions in both help desks.
- Depending on the terms of the agreement, the receiver help desk may directly communicate with the ticket requester and solve the ticket.
- Each help desk's business rules remain separate. For example, when a ticket is solved the status can be synced between the two help desks, but when it is closed in each depends on their own business rules.
- A help desk can automatically refuse to accept all sharing agreement invites.
- Sharing agreements can be cancelled at any time by either the sender or the receiver.

A sharing agreement grants another help desk permission to work on your tickets. You can grant another help desk one of the two following permissions:
- Make public & private comments, sync status
- Make private comments, do not sync status

The first option allows the receiver help desk to communicate directly with the requester and to change the ticket status (for example, setting it to Solved). These ticket updates are also reflected in the sender's version of the ticket.

Note: Although the receiver help desk may be allowed to make public comments and directly interact with the requester, email notifications will link back to the help desk where the request was originally submitted.

The second option (private comments only and no status syncing) limits the other help desk to providing you with information needed to resolve the support request. For example, imagine a company that builds something that includes components from other companies. Each affiliated company (business partner) can set up a help desk and a sharing agreement to provide more details on issues related to the components they supply. In this scenario, the sender help desk controls the ticket from initial request through to resolution, gathering information as needed from the affiliated help desk.

Setting up a ticket sharing agreement

To set up ticket sharing an admin creates a ticket sharing invite and defines the terms (permissions) of the sharing agreement.

To create a ticket sharing invite

1. Select **Settings > Tickets > Ticket Sharing**.
2. Select **Add Sharing Invite**.
   - The sharing invite looks like this:

3. Enter the name of another Zendesk account as the receiver subdomain.
4. Select the comment and status permission. You have two options:
   - Make public & private comments, sync status
   - Make private comments, do not sync status
5. Select the tag synchronisation setting. You have two options:
   - No, do not share tags between me and the receiver
   - Yes, share tags between me and the receiver

   Note: As noted on the dialog box, enabling tag synchronising may add more tags to your help desk.
6. Select the custom fields syncing setting. You have two options:
   - No, do not sync custom fields between me and the receiver
   - Yes, sync custom fields between me and the receiver
7. Click **Send Invite**.

The receiver is notified of the invite on their Ticket Sharing page, as shown here:
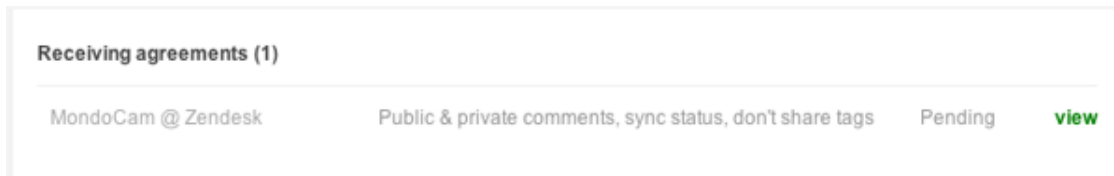
The receiver can view the terms of the sharing invite and either accept, decide later, or decline the agreement.
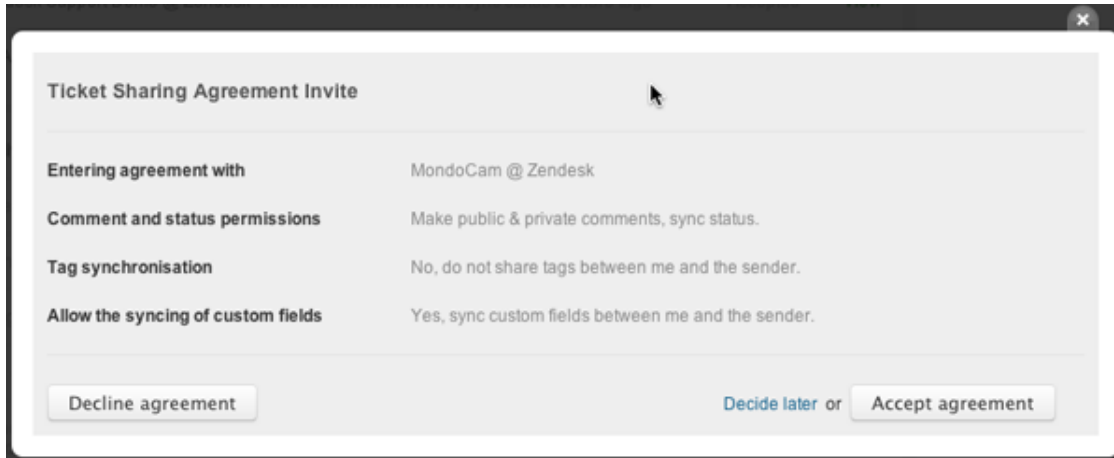
When accepted, both help desks can immediately share tickets.

If you decline an agreement, the sender is free to try again at another time. If you don't want to establish sharing agreements with any other help desks, you can set your account to automatically decline invites (see *Opting out of all sharing invites*). You can also deactivate sharing agreements at any time (see *Deactivating a sharing agreement*).

All of your sharing agreements (accepted, pending, and rejected) are displayed on the Ticket Sharing page.

Sharing a ticket

Once the sharing relationship is established, it's easy to share tickets with another help desk. Agents and admins can share tickets.

To share a ticket

1. Select a ticket to share.
2. Click **Share**, which is located next to the requester's name below the ticket ID.
3. Select the help desk you want to share the ticket with, as shown here:

4. Update the ticket by clicking **Submit**.

When the ticket has been shared, this is indicated in the ticket as shown here:

The sharing icon indicates, via the green arrow, that the ticket has been shared to another help desk. Likewise, any tickets that have been shared to you will show the name of the help desk that shared the ticket.

Depending on the permissions defined in the sharing agreement, the ticket status and comments may remain synced between the two help desks. The ticket's events and notifications log will indicate when a ticket update occurred due to ticket sharing.

Unsharing a ticket

You can unshare a ticket that you've shared with another help desk. Doing so means that the previously shared ticket will become an 'orphan' in the receiver's help desk. In other words, unsharing doesn't automatically remove the ticket from the receiver's help desk. Rather, the receiving help desk needs to manage the orphaned ticket out of their queue using their own business rules.

To unshare a ticket

1. Select the ticket you want to unshare.
2. Click **Edit/Share**, which is located next to the requester's name below the ticket ID.
3. Select the **Unshare ticket** action.
4. Optionally, add a private comment to the receiver explaining why you're unsharing the ticket.
5. Update the ticket by clicking **Submit**.

Opting out of all sharing invites

If you decide that your help desk will not share tickets with any other help desk, you can choose to opt out of all sharing invites.

To opt out of sharing invites

1. Select **Settings > Tickets > Ticket Sharing**.
2. In the section **Opt out of sharing**, select the **Decline all sharing agreement invites**.
3. Click **Save Tab**.

With this option set, you will never be informed of a sharing invite.

Deactivating a sharing agreement

Sharing agreements can be deactivated by either the sender or the receiver at any time. Deactivated agreements can't be reactivated, but both help desks are free to invite the other to accept a new sharing agreement.

To deactivate a sharing agreement

1. Select **Settings > Tickets > Ticket Sharing**.
2. Locate the agreement you want to deactivate and then select **View**.
3. Click **Deactivate Agreement**.

Your agreement partner will be informed of the deactivation via email and this will also be reflected on their Ticket Sharing page. All tickets shared before the agreement was deactivated remain in sync. Deactivating an agreement means that no new tickets can be shared.

Referring to shared tickets in business rules

Tickets that have been created in your help desk via ticket sharing can be referenced as conditions in automations, triggers, and views. The conditions **Ticket source** and **Ticket update via** include **Ticket sharing** as a value.

You can create a view of the tickets generated from ticket sharing, as in this example:
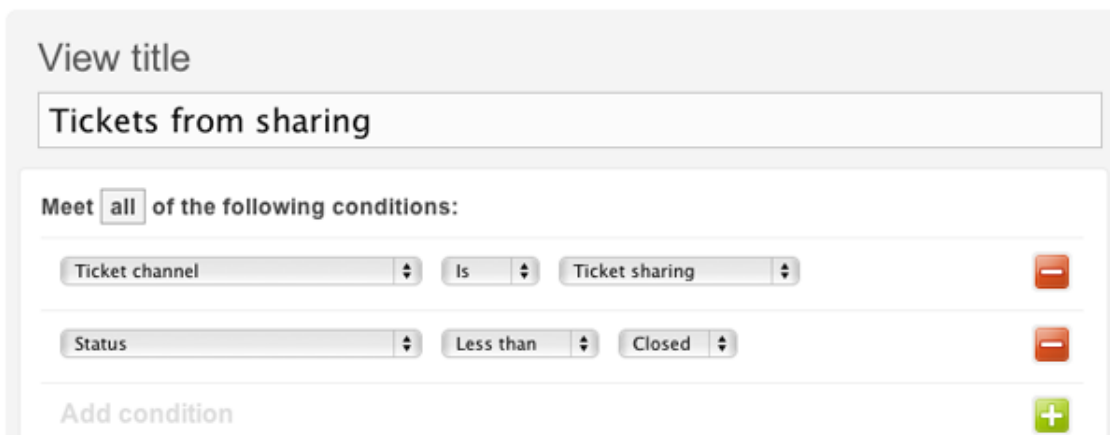
This will show you all the tickets that were shared to you. If you want to create a view of the all tickets you shared to another help desk, you can add a tag to the tickets and create business rules from that.

You can create automations or triggers that include the ticket sharing conditions. Again, using **Ticket source is Ticket sharing** or **Ticket update via Ticket sharing** as a condition you can create a trigger to escalate the shared ticket to a specific support group, to add tags, and so on.

Setting up Zendesk Voice

The Zendesk Voice channel integrates live telephone support into your help desk. Agents make themselves available to receive calls and their conversations with customers are recorded and added to tickets. When agents are unavailable, customers leave voicemail messages that automatically become tickets containing the voicemail recording and a transcription. The Zendesk Voice workflow is described in *Using Zendesk Voice*.

Setting up the voice channel means selecting a telephone number for incoming calls and then setting your call queuing options and recorded greetings. You'll also want to create business rules to track and manage voice tickets.

Only an administrator can set up the voice channel.

Voice trial, subscription, and billing

Zendesk Voice is available to all subscription plans. When you set up the voice channel, your first $1.00 of call activity is free. Once your free credit has been used, you need to subscribe to Zendesk Voice to continue using it. You can subscribe by selecting **Settings > Account > Subscription**.

Zendesk Voice is billed separately from your Zendesk subscription; you can subscribe to Zendesk Voice on your account's subscription page under **Settings** > **Account**. You pay monthly for calls made through Zendesk Voice. All calls are rounded up to the nearest minute.

Zendesk Voice offers rates based on the call costs that Twilio, our service provider, charges for accepting calls to your Zendesk Voice number, forwarding phone calls to support agents, and transcribing voicemails.

A phone call between a customer and support agent in Zendesk consist of two legs: an inbound leg, where the customer calls your Zendesk Voice phone number, and a forwarding leg, where Zendesk forwards the phone call to a support agent's phone line or browser. A voicemail consists of an inbound leg and a transcription cost if you have elected to transcribe voicemails. The cost of each call is the sum of each call leg.

The following table describes our current pricing.

Call type	Cost
Inbound call, forwarded to agent browser	1.6¢/min
Inbound call, forwarded to agent phone	3.8¢/min (US, Canada and UK landline)
	21.3¢/min (UK mobile)
Voicemail	1.3¢/min
Voicemail transcription (optional)	5¢/min

Getting started, selecting a telephone number

This first step in setting up your voice channel is to choose a telephone number for your customers to call for support. You can select a local US, Canadian or UK telephone number. If you have an

existing telephone number that you already use for support, you can forward that number to the Zendesk voice number.

To select a Zendesk voice telephone number

1. Select **Settings > Channels > Voice**.
2. To select a telephone number, click **Choose a phone number for your Zendesk**.
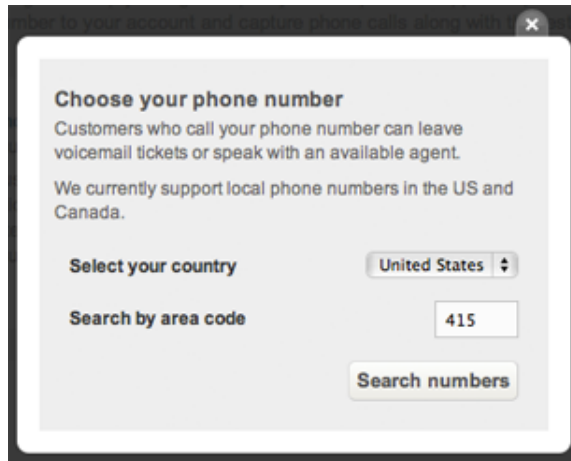
3. Enter an area code and then click **Next**.
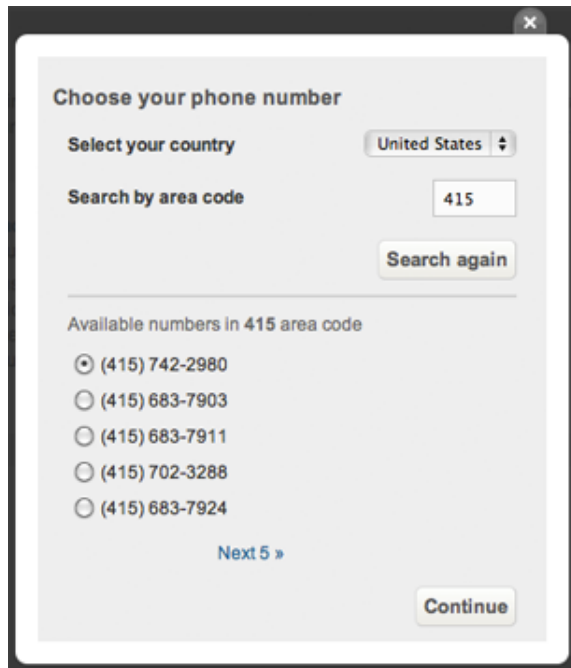
4. Select a phone number and then click **Choose Number**.

Note: Select a number that you're happy with because changing it requires contacting Zendesk Support.

Once you've selected a phone number, the voice channel settings are displayed.

The voice settings contained in these tabs are described in the following sections.

Enabling the voice channel and configuring the general settings

To enable the voice channel, select **Enable Voice > Yes**. You'll also want to configure the following voice settings.

Voice setting	Description
Maximum queue size	Your call queue size determines how many incoming calls will be kept waiting for an available agent before being sent to voicemail.
	You can select one of the following queue sizes:
	0 2 5 10 15
Maximum queue wait time	Callers who wait longer than the time specified in the maximum queue wait time are sent to voicemail.
	You can select one of the following wait times:
	1 minute

Voice setting	Description
	• 2 minutes • 5 minutes • 10 minutes
New live call recordings are public?	Enabling this option allows the requester to see recordings from live calls that are added to tickets.
Only route calls during business hours?	Enabling this option routes calls to available agents only during your account's configured business hours. Outside of your business hours, all calls are sent directly to voicemail. If you haven't already done so, you can configure your business hours by selecting **Settings > Account > Localization > Business Hours**.

These settings can be changed at any time. For example, during especially busy times you might want to increase the size of the queue or the maximum wait time.

Selecting voice greetings

The Voice channel provides recorded greetings for routing callers to voicemail, to acknowledge incoming calls and to tell users that an agent will answer shortly, and also hold music.

If you prefer to use your own custom greetings, you can choose to record new messages using a telephone or select an existing audio file.

To create a custom greeting

1. Select the Voice channel **Greetings** tab.

2. For each greeting you want to change, click the greeting drop down list and select **Create custom greeting**.
3. To create a new greeting via telephone, click **Record using a phone**.
   - Enter a telephone number. You'll receive a call at this number prompting you to record and save your new greeting.
4. To select a prerecorded audio file, click **Upload an audio file**.
   - You'll be prompted to select and upload a file. Both WAV and MP3 files are supported. The maximum file size is 10 MB.
5. Save your changes by clicking **Submit**.

Using the call activity dashboard

The call activity dashboard displays data about the call queue and your agents' voice channel activity. The time data in the dashboard is displayed in minutes and seconds.
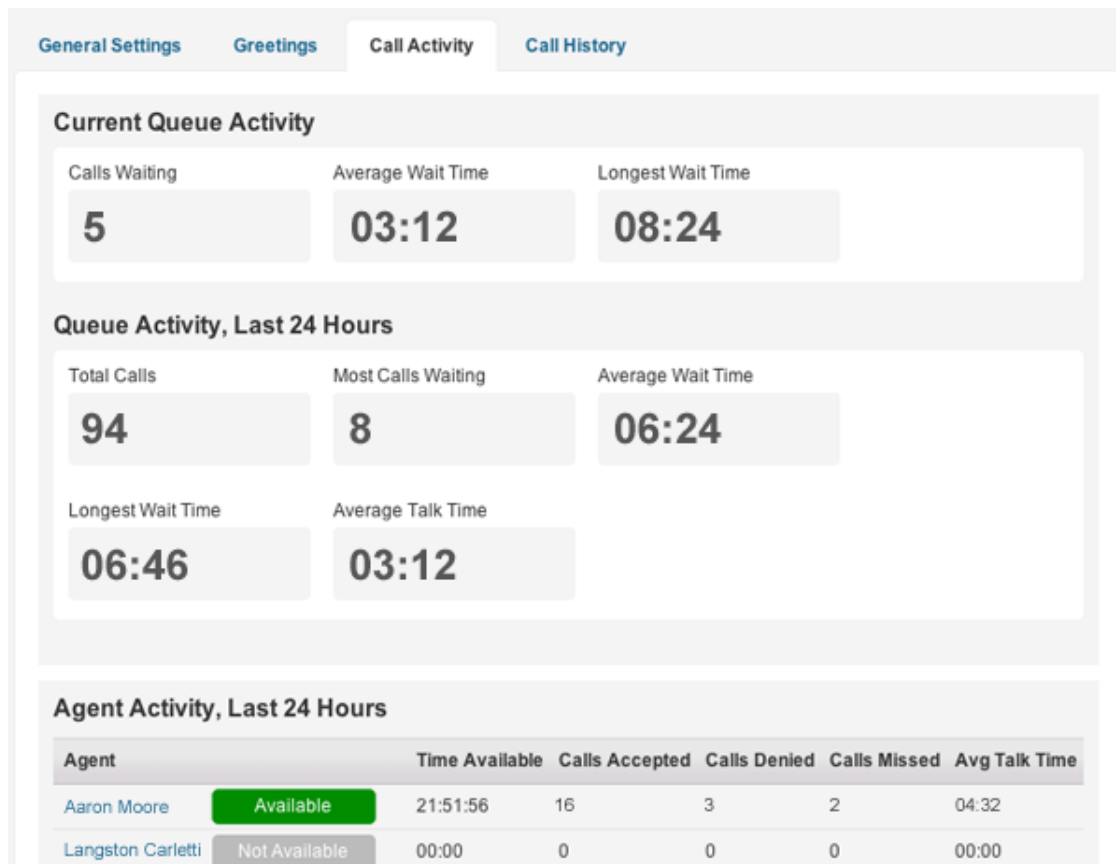
Three sets of data capture the current queue activity, activity over the last 24 hours, and activity for each agent. Current queue activity and agent activity are updated every 5 seconds. Agent activity over the last 24 hours is updated every 5 minutes. This data is described in the following tables.

Table 6: Current queue activity

Activity metric	Description
Calls waiting	The current number of callers in the queue waiting for the next available support agent.

Activity metric	Description
Average wait time	The average wait time for all callers who are waiting for an available agent.
Longest wait time	The longest wait time for any caller in the queue.

Table 7: Queue activity, last 24 hours

Activity metric	Description
Total calls	The total number of phone calls to your Zendesk phone number in the last 24 hours.
Most calls waiting	The largest the call queue has been in the last 24 hours.
Average wait time	The average wait time in the call queue, across all calls, in the last 24 hours.
Longest wait time	The longest any caller has waited in the call queue in the last 24 hours.
Average talk time	The average length of live phone call conversations in the last 24 hours.

Table 8: Agent activity, last 24 hours

Activity metric	Description
Agent	The agent's name and status. An agent can be in one of the following four states: **Not Available** means that the agent is not available to take phone calls. **Available** means that the agent is available to take calls. **On Call** means that the agent is unavailable because they are on another call. **Wrap Up** indicates that the agent has completed the last call but are busy updating the ticket and are therefore currently unavailable to take another call.
Time available	The total time the agent has been Available, On Call, and in Wrap Up in the last 24 hours.
Calls accepted	The total number of phone calls the agent has accepted in the last 24 hours.
Calls declined	The total number of times the agent has declined an incoming call in the last 24 hours.
Calls missed	The total number of times an agent has not answered their phone and the call was routed to the next available agent in the last 24 hours.
Average talk time	The average length of all live phone calls answered by this agent in the last 24 hours.

Reviewing call history

The Call History Tab lists all call activity and the billing for your help desk. The history will be displayed by billing period (a billing period is 30 days) with a total of one year of billing data always available for your reference. All calls are rounded up to the nearest minute.

The data contained in the call history is described in the following table.

Table 9: Call history data

Call history data	Description
ID	This is the call transaction ID and is used for billing purposes.
Date/Time	The date and time the call was received.
From	If the caller has already been added to your help desk and their user profile contains the telephone number they are calling from, then this column will display their name. If not, the caller's telephone number is displayed. If the caller blocks their number, you'll see 'Unknown'.
Answered by	This is either the name of the agent who answered the call or, if the call was unanswered, 'voicemail' is displayed.
Answered at	This is either the help desk support number or the agent's telephone number.
Minutes	The total number of minutes the call lasted.
Charge	The total charge for the call.

Testing your voice channel

You can test your new support phone number selecting your availability and then calling the number. When you enable the Zendesk Voice channel, a voice menu is added to the top menu bar.
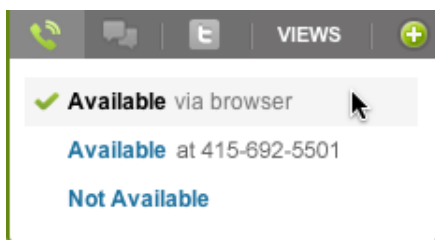
Each availability option allows you to test different aspects of using the voice channel. The first option directs the call to the browser. The second availability option forwards the call to the telephone number in your user profile (this number is never visible to callers). When **Not Available** is selected, the call is sent directly to voicemail or routed to the next available agent.

To test voicemail

1. Select **Not Available**.
2. Call your support phone number.

    3. You'll hear the voicemail greeting. Leave a message.

    4. Check your ticket view and you'll see a new ticket that includes the voicemail recording and a transcription.

To test a live call

    1. Select **Available via browser** or **Available at <your phone number>**.

    2. Call your support phone number.

    3. The call console will be displayed in the lower right corner of the web browser.
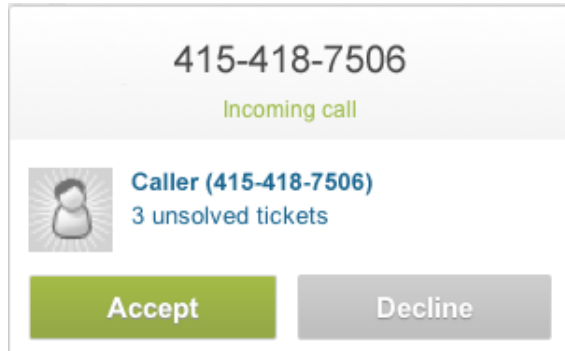
    4. If you selected **Available via browser**, click **Accept** to pick up the call. If you redirected calls to your telephone, your phone will ring and you'll be prompted to accept the call. Once you do, a ticket is created. The incoming call workflow is described in detail in *Using Zendesk Voice*.

Setting up business rules to track and manage voice tickets

To track tickets received via the voice channel or include them in your business rules, the **Ticket channel** condition returns both tickets generated via voicemail and incoming phone calls. For example, to track all voice channel tickets, you can create a view using **Ticket channel is Voicemail** and **Ticket channel is Phone call (incoming)**.
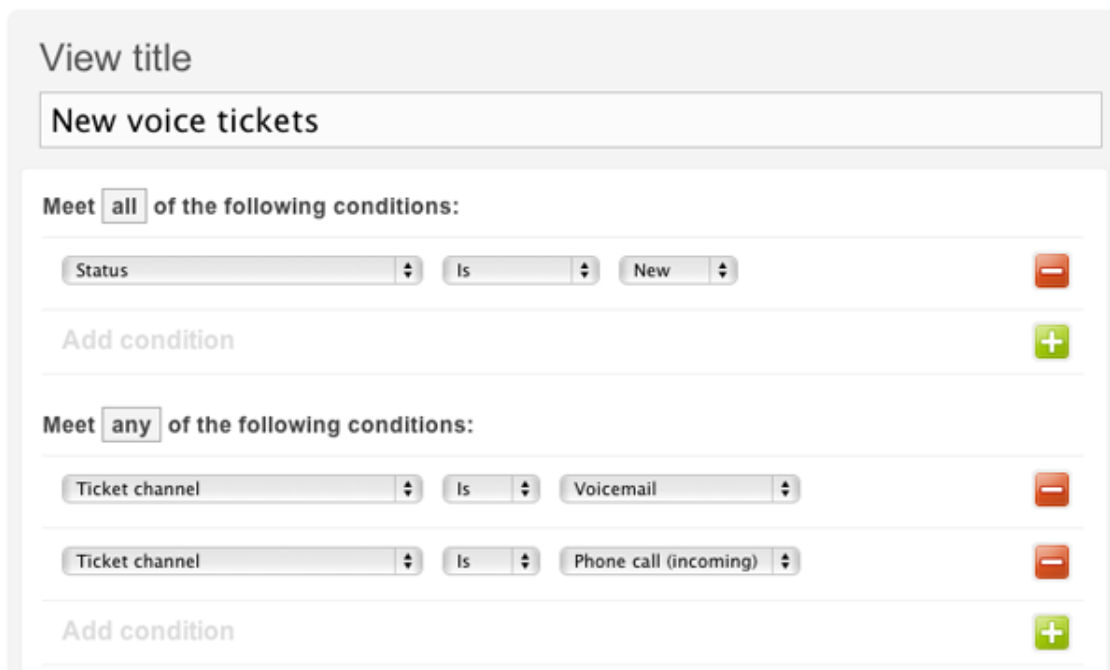
The **Ticket update via** condition can also return voicemail and incoming phone calls.

You can also create reports using both the standard Zendesk reporting and also GoodData reporting. In GoodData, you can report on tickets by type, which of course also includes tickets generated from incoming phone calls and voicemails.

Agents allowed to accept phone calls

All agents can accept phone calls once Zendesk Voice has been enabled for your help desk. In the Enterprise version of Zendesk, you can choose the agent roles that are allowed to use it. By default, all the pre-defined agent roles, not including Light Agents, have permission to answer phone calls.

Channels   ☑ **Can answer chat requests**

Can make himself/herself available for end-users's chat session requests.

☑ **Can access Twitter saved searches**

Can access Tweets from the Twitter saved search stream.

☑ **Can answer phone calls**

Can make himself/herself available to answer end-user's calls.

You can modify the predefined roles or create new roles that include, or exclude, the permission to accept phone calls. For more information, see *Custom agent roles*.

Using Zendesk Voice

Once your voice channel has been set up and enabled (see *Setting up Zendesk Voice*), your help desk is ready to accept live phone calls and voicemails. The voice availability settings are added to the top menu bar.
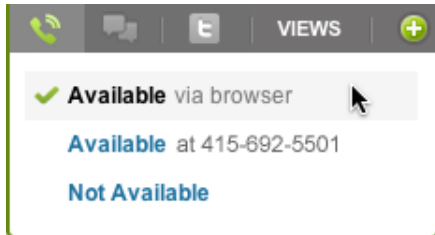
By default, each agent's availability is set to **Not Available**. When no agents are available, all calls are sent to voicemail and new tickets are automatically created for each. Agents can review these and complete and assign the tickets based on your workflow.

When you're ready to accept live phone calls, you have two availability options. You can answer phone calls within Zendesk and your Web browser or you can redirect incoming calls to the telephone number in your user profile (if you've added one to your profile).

The incoming call workflow: how live calls and voicemails become tickets

All of the agents that make themselves available to take calls are added to a pool of available agents. Calls are queued and routed according to the following rules.

1. If a new incoming call exceeds the maximum queue size (see *Enabling the voice channel and configuring the general settings*), the total number of calls that are allowed to wait in the queue, the caller is sent to voicemail.
2. If a new incoming call is within the limits of the maximum queue size, the caller is queued for the next available agent. The caller can dial 1 at anytime to leave a voicemail.
3. If all the available agents are busy with other calls, callers are queued up to the maximum queue wait time (see *Enabling the voice channel and configuring the general settings*). Once they exceed that wait time, callers are sent to voicemail.
4. The next available agent is the one who has been available the longest without accepting a phone call (the most idle agent). This is the agent that receives new incoming calls first.
5. If the most idle agent does not answer the phone within 30 seconds or declines the call, it is placed back into the queue to wait for the next most idle agent. This continues until all available agents have accepted calls. Once this occurs, new incoming calls are handled based on the queue settings, as described in the previous steps.

Until an agent picks up the call, the caller hears the *available agents* and *wait* greetings (see *Selecting voice greetings*).

Receiving a call

When you receive an incoming phone call, the call console is displayed in the lower right corner of the help desk. If you chose to receive calls at your telephone number, rather than through Zendesk,

your telephone will ring and you can accept the call by following the voice prompt or by clicking **Accept** in the call console.
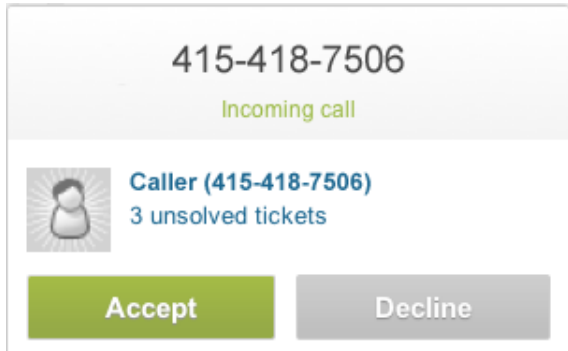
If you don't answer within 30 seconds or if you decline the call, it is placed back into the queue to wait for the next available agent.

Identifying the caller and handling new user accounts

Calls received from new, unknown users generate new user accounts that are identified only by the telephone number they are calling from. To communicate via email with these users going forward, you need to ask your callers for their email address while you're on the call with them and edit that new user account. You can do that from within the ticket while you're on the phone with them by clicking **User Profile > Edit** or after you've completed the call. You can also open the help desk in two browser windows or tabs and edit the user's profile while you're on the call.

Each user must have a unique telephone number; this is how Zendesk Voice identifies them when they call in. Therefore, the user's profile phone number must be their direct line. If the user hasn't already done so themselves, you should verify that the number they are calling from is their direct line and then select the **Direct Line** option in the user profile, as shown here:

Setting a telephone number as a user's direct line means that the number cannot be used by any other users in the account.

If the caller is an existing end-user and their number has been added to their profile as their direct line, their name is displayed in the call console.
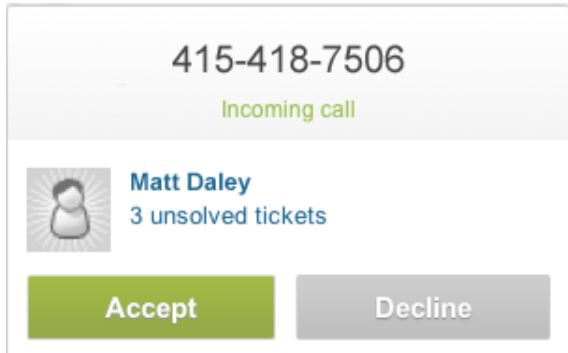
Unknown users can also actually be existing users if they're calling from a telephone number that they haven't added to their user profile. In this case, you can merge the new user account with their existing user account. For more information, see *Merging a user's duplicate account*.

Accepting a phone call

When you receive a call, you have the option to accept or decline the call. If you don't accept the call within 30 seconds, it is placed back into the queue. Declining the call also places it back in the queue to wait for the next available agent. When you accept the call, the call console begins recording the call and a ticket is created.
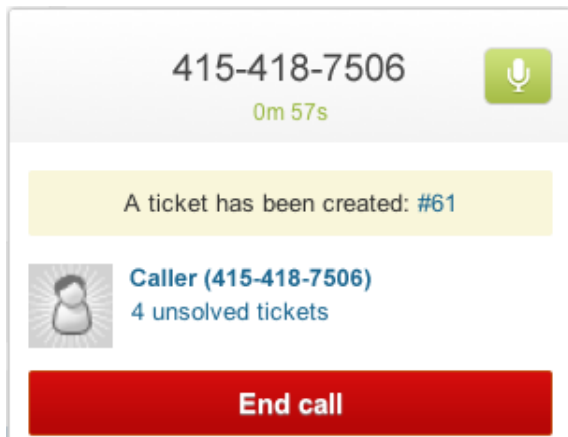
While speaking with the caller, you can click the link to the newly created ticket and enter information as needed as a comment. The call console remains visible in the lower right corner. While on the call, you can mute and unmute as needed by clicking the microphone icon in the top right corner of the call console.

To end the call, click **End call**. If you've redirected the call to your telephone you can also end the call by hanging up.
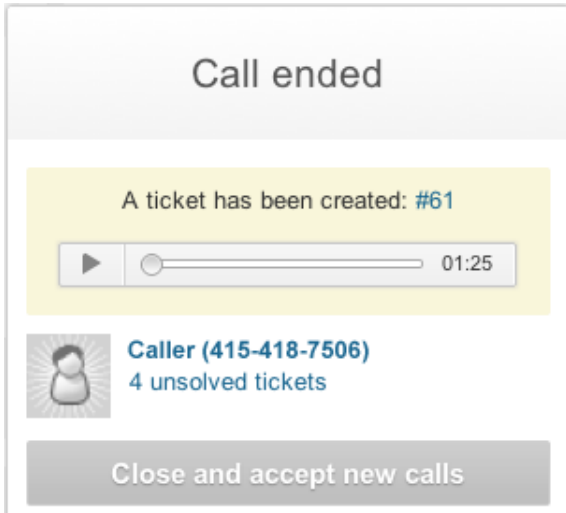
In this state, with the call ended and the call console still open, you're considered to be in *wrap up* and are unavailable to take more calls. This allows you to complete annotating and setting the ticket properties before moving on to the next call. When you click **Close and accept new calls**, you're placed back into the pool of available agents.

Completing the new voice ticket

When you accept the phone call a new ticket is created (as shown above). You can click the link to the ticket and simultaneously speak with the caller, add a comment to the ticket, and update the ticket properties.

By default, when you answer a call you are assigned to the ticket. This overrides any triggers you have that also set the assignee.

When a ticket is created, a private comment is immediately added that includes the following information:

The user won't see this comment of course, since it's private, but creating a new ticket fires the **Notify requester of received request** trigger and sends the user an email notification confirming that a ticket was created. This only occurs if the call is from a known user whose account contains their email address. If the caller is unknown, email notifications aren't sent until you've updated their user profile with their email address. In the first case you might not want an email notification to be sent until you've updated and submitted the ticket. This can be done, by an administrator, by editing the **Notify requester of received request** trigger to exclude tickets received from the **Phone call (incoming)** channel. For more information, see *Setting up business rules to track and manage voice tickets*.

When you update the ticket by clicking **Submit**, the recording of your conversation is added as a new public comment. If you added a public comment with a summary of the support issue, both public comments are added at the same time.

Phone Call from Caller (415-418-7506)

▶ | ◯———————————————— 00:45 | ‖‖‖‖
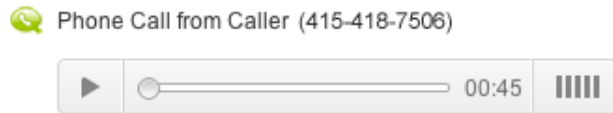
Call Details

Call from: 415-418-7506
Time of call: Sep-09 2011 12:06:42 am
Answered by: Lawrence Daley
Length of phone call: 1 minute, 16 seconds

Sep-09 2011 00:06

Thanks for your call. You said that you're unable to attach a third party wireless flash trigger (Wireless Flash 180) to your camera. The model is listed as being supported. I need to follow up with hardware and get back to you about this issue.

Thanks for contacting MondoCam Support!

Sep-09 2011 00:16

Since two public comments were added, two ticket notifications are sent to the user. Your voice channel can be configured to prevent users from accessing the live call recordings (see *Enabling the voice channel and configuring the general settings*). If you've allowed the recordings to be accessible, the user can click a link to the recording from the notification email or by accessing the ticket in the help desk Web portal.

Note: Unlike voicemail tickets, live call recordings do not include a transcription.

When the caller leaves a voicemail

When no agents are available or the incoming calls exceed the maximum queue size or wait time, callers are sent to voicemail. Each voicemail message automatically becomes a ticket. If the call is from a new or unidentified existing user, a new user account is created (you can merge the new account with the user's existing account). Tickets generated from a voicemail message contain the voicemail recording and a transcription. Voicemail messages can be up to 3 minutes long.

In this example the caller is unknown and only identified by their telephone number; therefore they will not receive the received request email notification since the new user account doesn't contain their email address. Existing users who leave voicemails receive a notification just as if they had submitted a supported request via the other ticket channels.

To track all calls that have resulted in voicemails, you can set up a view (see *Setting up business rules to track and manage voice tickets*).

You can either manually, or using business rules, update voicemail tickets as needed and then respond to the caller.

Note: Zendesk Voice does not support making outbound calls.

Merging tickets when a new call is about an existing ticket

You may often find that callers are contacting you about an issue for which a ticket has already been created. To handle this situation, just conduct the call and add comments as needed to the new ticket. You can then merge the new ticket with the existing ticket.

To merge two tickets

1. Select and open the ticket you want to merge into another ticket.
2. Near the **Submit** button, where the ticket update options are available, click the drop down list and select **Merge into another ticket**.
3. You can search by ticket number for the ticket you want to merge this one into. Or, you can select a ticket from the list of the user's other tickets.
4. After you've selected the ticket, click **Confirm and Merge**.

Searching for voice tickets

You can search for tickets that were generated from phone calls and voicemails. You can also search for a user's tickets using their phone number.

Using the `via` keyword in a search you can search for either phone call or voicemail tickets, as in the following examples.

```
via:voicemail
```

```
via:phone_call_inbound
```

If you want to search for a user's ticket using their telephone number, you can use a search statement like this:

```
requester:+14154187506 status:new
```

For more information about searching the help desk, see *Zendesk search reference*.

Chapter

5

Streamlining the help desk workflow

- *Creating ticket handling shortcuts with macros*
- *Organizing your macros*
- *Streamlining workflow with ticket updates and triggers*
- *Streamlining workflow with time-based events and automations*
- *Using placeholders*
- *Using tags*
- *Filtering business rules*
- *Notifying external targets*

Creating ticket handling shortcuts with macros

A simple and effective way to streamline your help desk workflow is to create macros for support requests that can be answered with a single, standard response. This saves your agents the time and effort of crafting a separate response to each customer that has the same issue.

Macros can be created from scratch or you can base them on existing tickets. Macros contain actions, which can be updates to ticket properties and comments to both customers and the support staff. Macros are manually applied to tickets by agents.

There are two types of macros: personal macros (created by an agent or admin for their own use) and shared macros (created by an admin for everyone's use). A personal macro is only visible to and can only be used or modified by the agent or admin who created it. Admins can create shared macros and also modify all shared macros, regardless of who created them.

Macros can also be organized into categories to help the support staff quickly locate and apply them. For more information, see *Organizing your macros*.

Zendesk macros to get you started

Zendesk provides a number of macros to get you started. You can view these macros by selecting **Manage > Macros**.

Close and redirect to topics

This sets the ticket status to closed if it is an incident of a known problem, informs the requester via a comment that the ticket has been closed and recommends that they visit the forums for more information about the incident.

Customer not responding

This is a reminder that can be sent to the requester if they have not responded to a request for more information on a pending ticket.

Downgrade and inform

This tells the requester that the priority of their request has been downgraded to low and that there may be some delay in resolving their request.

Take it!

This macro is a shortcut for agents to assign a new request to themselves.

You can use these macros as is, edit them, or clone them to make copies that you can modify and repurpose.

Creating macros

Unlike triggers and automations, macros *only* contain actions, not conditions. Conditions aren't used because nothing is automatically evaluating tickets to determine if a macro should be applied. Agents evaluate tickets and apply macros manually as needed.

To add a personal macro (agents and admins)

1. Select **Manage > Macros**.
2. Select **Add Macro**.
3. Enter the title and add actions for your macro (described below in *Building macro action statements*).
4. Click **Add Macro**.

To add a shared macro (admins only)

1. Select **Manage > Macros**.
2. Select **Add Macro**.
3. Enter the title and add actions for your macro (described below in *Building macro action statements*).
4. If you're an admin, you can set the macro availability to the following:
   - All agents
   - Agents in group (and then select a group by name). This option is only available in the Zendesk Plus+ plan.
   - Me only
5. Click **Add Macro** (or **Update Macro**, if you're editing the macro).

Building macro action statements

Using macros you can set ticket properties, add or modify tags, and add comments.

Table 10: Actions

Actions	Description
Status	The ticket status can be set to the following:
	Open indicates that the ticket has been assigned to an agent.
	Pending indicates that the requester has been asked for information and the ticket is therefore is on hold until that information has been received.
	Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed.
Priority	The priority can be set to **Low**, **Normal**, **High** or **Urgent**.
Type	The type can be set to the following:
	Question
	Incident indicates that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the other tickets that are reporting the same problem are set to Incident and linked to the problem ticket.
	Problem is a support issue that needs to be resolved.
	Task is used by the support agents to track various tasks.
	Note: It's currently not possible to link incident tickets to problem tickets or set task due dates using the task action in macros.
Group	You can set groups to any of the following:
	(—) is used to unassign a group (if one has already been assigned)

Actions	Description
Assignee	(**current user's groups**) is all the groups to which the agent who is updating the ticket belongs.
	Group name is the actual name of the group that is assigned to the ticket.
	You can set assignee to any of the following:
	(**—**) is used to set assignee to no one (unassigned)
	(**current user**) is the last person to have updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated.
	Assignee name is the actual name of the person assigned to the ticket.
Set tags	The tags you want to insert into the ticket. The set tag action *replaces* the current tags. Tags must be separated with spaces. Multi-word tags must be joined with an underscore (for example, about_sales).
Add tags	The tags you want to add to the existing list of tags (if any). Tags must be separated with spaces. Multi-word tags must be joined with an underscore (for example, about_sales).
Remove tags	The tags that you want removed from the existing list of tags contained in the ticket (if any). Tags must be separated with spaces.
Comment/description	The text of the email notification.
Comment mode	Public or Private. Only agents can view private comments.
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as actions. You can select the drop-down list values and Yes or No for checkboxes.

Creating macros from existing tickets

You can create a macro from an existing ticket, which enables you to, for example, create a standard response to an issue that has already been addressed. Agents can only create personal macros from tickets. Admins can create shared macros from tickets.

To create a macro from an existing ticket

1. Select the ticket you want to base the new macro on.
2. Select the ticket update option called **Update ticket and add as macro**.
3. Click **Submit**.
4. Enter a title for the new macro and then modify the actions as needed. You might want to rewrite the comment to be less specific to the original request and more appropriate for reuse.
5. Select **Add Macro**.

Applying macros to tickets

You manually apply macros to tickets. Typically, you apply one macro to one ticket. However, you can also apply a macro to more than one ticket at a time and you can also apply more than one macro to a single ticket.

To apply a macro to a ticket

1. Select a ticket.
2. Select a macro from the **Apply Macro** menu. The ticket properties will be updated.
3. Edit the macro if needed (for example, personalizing the comment if one has been added).
4. Click **Update Ticket**.

To apply a macro to more than one ticket at a time

1. Select a view that contains the tickets you want to apply the macro to.
2. Select the table view of the tickets.
3. The table view contains a selection checkbox (on the right side). Select tickets from the list or select them all using the selection checkbox in the table header.
4. Select a macro from the **Apply Macro** menu. Ticket properties for all selected tickets will be updated.
5. Click **Update Selected Tickets**.

To apply more than one macro at a time to a ticket

1. Select a ticket.
2. Select a macro from the **Apply Macro** menu. The ticket properties will be updated.
3. Select a second macro from the **Apply Macro** menu. The ticket properties will be updated again.
4. Click **Update Ticket**.

Note: Keep in mind that what one macro does to the ticket can easily be undone by another macro. So why would you apply more than one macro to a ticket? A typical use case is a ticket that contains more than one question or issue, let's say two in this example. You might have set up two macros that both insert a comment into a ticket to answer each issue separately. By applying each macro to the ticket you add two comments and address both issues in a single response.

Editing and cloning macros

You can edit and clone macros. Cloning a macro creates a copy that you can modify and repurpose. Agents can only edit and clone their personal macros. Admins can edit and clone their personal macros and all shared macros.

To edit a macro

1. Select **Manage > Macros**.
2. Locate the macro you want to edit and select **Edit**.
3. Modify the title and actions as needed.
4. Click **Update Macro**.

To clone a macro

1. Select **Manage > Macros**.

2. Locate the macro you want to clone and select **Clone**. This command appears when you move your mouse over a macro in the list.
3. Enter a new title for your macro and modify the actions as needed.
4. Click **Add Macro**.

Deleting and deactivating macros

If you decide that you no longer need a macro you can either delete it or deactivate it. Deleting it of course means that it's gone and can't be retrieved. You can instead deactivate a macro so that it does not appear in the **Apply Macro** menu and therefore cannot be used. Deactivated macros are listed in a separate table on **Manage > Macros** and can be reactivated if needed. Agents can only delete and deactivate their personal macros. Admins can delete and deactivate their personal macros and all shared macros.

To delete a macro

1. Select **Manage > Macros**.
2. Locate the macro you want to delete and select **Edit**.
3. Click **Delete**.

To deactivate/reactivate a macro

1. Select **Manage > Macros**.
2. Locate the macro you want to deactivate and select **Deactivate**. This command appears when you move your mouse over the macro in the list of macro. The macro is deactivated and displayed in the list of inactive macros.
3. To reactivate the macro, select it from the list of inactive macros and select **Activate**.

Organizing your macros

Most helpdesks create and use lots of macros. As your list of macros grows, you may find it difficult to quickly locate macros when you're trying to apply one to a ticket. You can remedy this by organizing your macros into categories. You do this by including the categories in your macro titles and separating them with two colons, as in this example:

You can create up to three levels of categories. This macro title indicates that you're assigning the ticket to yourself and setting the Type property to Question.

The **Apply Macro** menu (available when you're creating and updating tickets) automatically displays categorization like this:
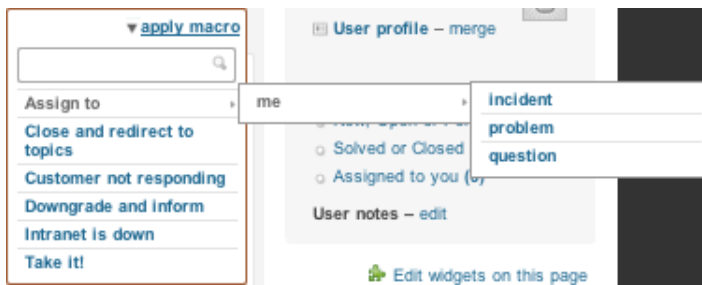
Reordering the list of macros

You can also reorder your list of macros, which affects what you see in the **Apply Macro** menu. Agents can only reorder their personal macros. Admins can reorder their personal macros and all shared macros.

To reorder the list of macros

1. Select **Manage > Macros**.
2. Click **Reorder**. You'll find this at the end of the list of active macros.
3. Click and drag macros to new locations.
4. Click **Done**.

Note: Reordering your list of macros does not bear the same risks as reordering triggers and automations because macros are executed one at a time by agents as needed, not automatically when a ticket is updated (trigger) or when an automation has been set to execute based on an event in time. Reordering the list of macros simply reorders the list in the **Apply Macro** menu.

Streamlining workflow with ticket updates and triggers

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. Another can be created to then notify the customer when the ticket is solved.

Only admins can create and manage triggers.

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 and optionally notify the requester or the support staff). You build condition and action statements using ticket properties, field operators, and the ticket property values.

There are two types of conditions – *all* conditions and *any* conditions. The *all* conditions, as you've probably already figured out, must all be true. If any of the condition statements fail (are not true), the trigger will not act on the ticket.

Meet all of the following conditions:

Ticket is...   Created

Status   Is not   Solved

Additionally at least one of the *any* conditions must also be true. For example, you might want a trigger to act only on tickets that are submitted from a list of specific email addresses, as in this example:

Meet any of the following conditions:

Ticket received at...   sales   @mondocam.zendesk.com

Ticket received at...   support   @mondocam.zendesk.com

If either of these conditions is true, the trigger will fire. If you use only one condition in the *any* section, it will behave like an *all* condition and therefore must be true for the trigger to fire.

Action statements follow the same format, but rather than testing for conditions to be true or not, actions set ticket properties and send email notifications, as in this example:

Perform these actions:

| Email user | ▼ | (requester) | ▼ | ➖ |

Email subject:

Request received: {{ticket.title}}

Email body:

Your request (#{{ticket.id}}) has been received, and is being reviewed by our support staff.

To review the status of the request and add additional comments, follow the link below:
http://{{ticket.url}}

{{ticket.comments_formatted}}

View available placeholders »

Add action ➕

Each time a ticket is created or updated *all* of your triggers run; therefore, as you're creating triggers you need to think about the order of triggers because an action in one trigger may change a ticket property that was changed by another trigger. If you're not careful, this can result in multiple email notifications being sent, which can create confusion for your customers.

Zendesk triggers to get you started

To help you get started with triggers, Zendesk provides you with a set of triggers and mail notifications that are best practices in a typical help desk workflow. To view these triggers select **Manage > Triggers and mail notifications**. You can select **Edit** to see the conditions and actions that have been defined for each trigger.

Notify requester of received request

Notifies the requester via email that their request has been received and has become a ticket.

Notify requester of comment update

When an agent adds a public comment to the ticket the requester is notified via email. This is set up for public comments only, not private or internal comments.

Notify requester of solved request

When an agent resolves the ticket (sets it to solved) the requester is notified via email. The email message invites the requester to review the resolution and add a comment and reopen the ticket if needed.

Notify assignee of comment update

Notifies the assigned agent when a comment is added to the ticket. Comments can be either private (added by an agent) or public (added by an agent or the requester).

Notify assignee of assignment

Notifies the agent that has been assigned to a ticket of the new assignment.

Notify assignee of reopened ticket

Notifies the assigned agent of a solved ticket that the ticket was updated with a new comment by the requester and reopened.

Notify group of assignment

Notifies a group when a ticket is assigned to a group to which they belong.

Notify all agents of received request

Notifies all non-restricted agents when a new ticket is created that has also not been automatically assigned to a group.

Notify a Twitter requester of a received request

Replies via tweet to a new request generated by someone setting a Twitter Favorite.

You can use these triggers as is or clone them to make copies that you can modify and repurpose. You can also edit these triggers but it's better to clone them and make changes to the copies. You can then deactivate these Zendesk triggers if needed.

Creating triggers

You can create triggers from scratch or create copies of existing triggers and then modify and use them for some other purpose (see *Editing and cloning triggers*).

To add a trigger

1. Select **Manage > Triggers and mail notifications**.
2. Select **Add Trigger**.
3. Enter a title for your trigger.
4. Add the conditions and actions for your trigger (described below).
5. Save your new trigger by clicking **Add Trigger**.

Your new trigger is added to the end of the list of triggers. You can reorder the list of triggers but doing so may affect other active triggers. For more information, see *Reordering triggers*.

Building trigger condition statements

Condition statements consist of conditions, field operators, and condition values (these vary depending on the condition selected). Condition statements are essentially 'if' statements that return all tickets that meet the specified criteria. The first condition statement that evaluates to false terminates the trigger.

Table 11: Trigger Conditions

Condition	Description
Status	The ticket status values are:
	New is the initial status of a newly created ticket (not assigned to an agent).
	Open means that the ticket has been assigned to an agent.
	Pending is used to indicate that the requester has been asked for information and the ticket is therefore on hold until that information has been received.
	Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed.

Condition	Description
	Closed means that the ticket has been locked and cannot be reopened or updated.
	When selecting a status, you can use the field operators to specify a range of tickets based on their status. For example, a condition statement that returns only New, Open, and Pending tickets looks like this:
	Status is less than Solved
Type	The ticket type values are:
	Question
	Incident is used to indicate that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the other tickets that are reporting the same problem are set to Incident and linked to the problem ticket.
	Problem is a support issue that needs to be resolved.
	Task is used by the support agents to track various tasks.
Priority	There are four values for priority: **Low**, **Normal**, **High**, and **Urgent**.
	As with status, you can use the field operators to select tickets that span different priority settings. For example, this statement returns all tickets that are not urgent:
	Priority is less than Urgent
Group	The group values are:
	(—) indicates that no group is assigned to the ticket.
	(assigned group) is the group that is assigned to the ticket.
	Group name is the actual name of the group that is assigned to the ticket.
Assignee	The assignee values are:
	(current user) is the last person to have updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated. And an update may have been made by the assignee, the requester, or someone who was CC'd on the ticket.
	(requester) is the ticket requester. You can select this option to return tickets that were opened by and then assigned to the same agent, for example.
	(assignee) is the person who is assigned to the ticket.
	Agent name is the actual name of the person assigned to the ticket.

Condition	Description
Requester	The requester values are:
	(**current user**) is the last person to have updated the ticket.
	(**requester**) is the ticket requester.
	(**assignee**) is the person assigned to the ticket. The condition statement 'Requester is Assignee' is true if the requester is also the person assigned to the ticket. This is possible if an agent created a ticket and was then assigned to it.
	Agent name is the actual name of the agent.
Organization	The organization values are:
	(**—**) is used to indicate that no organization has been added to the ticket.
	Organization name is the name of an organization.
Tags	You use this condition to determine if tickets contain a specific tag or tags. You can include or exclude tags in the condition statement by using the operators **Contains at least one of the following** or **Contains none of the following**. More than one tag can be entered. They must be separated with a space.
Ticket channel	The ticket channel is where and how the ticket was created and can be any of the following: • Web form • Email • Chat • Twitter • Twitter DM (direct message) • Twitter Favorite • Voicemail • Phone call (incoming) • Get Satisfaction • Feedback Tab • Web service (API) • Trigger or automation • Forum topic • Closed ticket • Ticket sharing
Ticket update via	This condition indicates from where the ticket was updated and can be any of the same sources as the ticket channel condition (above).
Current user	You can select any of the following for the type of user that last updated the ticket:

Condition	Description
	(agent) is a support staff member.
	(end user) is anyone who is a registered help desk user and not an agent or an administrator. They can only submit and track tickets and communicate with agents publicly (meaning their comments can never be private).
	Agent name is the actual name of an agent.
Ticket Satisfaction	This condition returns the following customer satisfaction rating values: • **Unoffered** means that the survey has not previously been sent • **Offered** means that the survey has already been sent • **Bad** means that the ticket has received a negative rating • **Good** means that the ticket has received a positive rating
Ticket is	Created or Updated.
Ticket received at	You use this condition to determine the email address from which the ticket was received. Zendesk allows you to forward emails to any address at your Zendesk subdomain. For example: sales@mondocam.com --> sales@mondocam.zendesk.com support@mondocam.com --> support@mondocam.zendesk.com
Comment is	This condition returns the type of comment contained in ticket updates. **Public** is a comment that everyone can see. **Private** is a comment that only members of the support staff can see. **Present (public or private)** is used to indicate if the update contains a new comment. **Present, and requester can see the comment** is used to indicate that the update contains a comment and that it is visible to the requester (in other words, not private).
Comment text	Using this condition you can check for the presence of single words and strings of words in either the subject or body of the comment. You can use any of the following operators: • Contains at least one of the following words • Contains none of the following words • Contains the following string • Contains not the following string
Reopens	The number of times a ticket has moved from Solved to Open or Pending.
Agent replies	The number of public agent comments.

Condition	Description
Assignee stations	The number of different agents to which a ticket has been assigned.
Group stations	The number of different groups to which a ticket has been assigned.
Within business hours?	Yes or No. This condition is available if an admin has enabled business hours (**Settings > Account > Localization > Business Hours**).
Requester's language	Returns the language preference of the person who submitted the request.
Requester's Twitter followers are	This is the number of the requester's Twitter followers.
Requester's number of tweets is	This is the total number of the requester's tweets.
Requester is verified by Twitter	This condition is used to verify that the requester is a verified Twitter account.
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as conditions. You can select the drop-down list values and Yes or No for checkboxes.

Building trigger action statements

Action statements define what occurs if all the condition statements are true and the trigger fires. You can think of action statements as 'then' statements – *if* all of your conditions are true *then* perform these actions to update the ticket and optionally send notifications.

Table 12: Trigger actions

Actions	Description
Status	The ticket status can be set to the following:
	New is the intitial status of a newly created ticket (not assigned to an agent).
	Open means that the ticket has been assigned to an agent.
	Pending is used to indicate that the requester has been asked for information and the ticket is therefore is on hold until that information has been received.
	Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed. When tickets are closed is based on business rules you define for this step in the workflow, using automations.
	Closed means that the ticket has been locked and cannot be reopened or updated.
Priority	The priority can be set to **Low**, **Normal**, **High** or **Urgent**
Type	The type can be set to the following:
	Question

Actions	Description
	Incident indicates that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the other tickets that are reporting the same problem are set to Incident and linked to the problem ticket.
	Problem is a support issue that needs to be resolved.
	Task is used by the support agents to track various tasks.
Group	You can set groups to any of the following:
	(—) is used to unassign a group (if one has already been assigned)
	(current user's groups) is all the groups to which the agent who is updating the ticket belongs.
	Group name is the actual name of the group that is assigned to the ticket.
Assignee	You can set the assignee to any of the following:
	(—) is used to set assignee to no one (unassigned)
	(current user) is the last person to have updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated.
	(requester) is the ticket requester. You can select this option to return tickets that were opened by and then assigned to the same agent, for example.
	(assignee) is the person who is assigned to the ticket.
	Assignee name is the actual name of the person assigned to the ticket.
Ticket Satisfaction	You can set this action to: **offered to requester**. This indicates that the survey request has been sent to the ticket requester.
Set tags	The tags you want to insert into the ticket. The set tag action replaces the current tags. Tags must be separated with spaces.
Add tags	The tags you want to add to the existing list of tags (if any). Tags must be separated with spaces.
Remove tags	The tags that you want removed from the existing list of tags contained in the ticket (if any). Tags must be separated with spaces.
Email user	You can set the email user to any of the following:
	(current user) is the last person who updated the ticket.
	(requester) is the ticket requester.
	(assignee) is the agent assigned to the ticket.

Actions	Description
Email group	**(all non-restricted agents)** includes all agents that have unrestricted access to the ticket.
	Email user name is the actual registered name of the person who will receive the email.
	Adding the email user action also inserts the email subject and body.
	You can set email group to any of the following:
	(—) is used to set the email group to none.
	(assigned group) is a reference to the assign group.
	Email group name is the actual name of a group.
Notify target	Set the external target to notify. For more information about using targets, see *Notifying external targets*.
Tweet requester	Setting this action allows you to respond to the twitter requester with a tweet.
Add cc	Add an agent or end-user to copy on the ticket update. This action is available when you enable CCs on tickets (**Settings > Tickets > Enable CCs on Tickets**).
Share ticket with	Select a help desk to share the ticket with. See *Sharing tickets between networked help desks*.
Set requester's language to	Set the requester's language to one of your supported help desk languages.
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as actions. You can select the drop-down list values and Yes or No for checkboxes.

Reordering triggers

You can reorder your list of triggers, but keep in mind that all of your active triggers are run (first to last) each time a ticket is created or updated; therefore, the order of execution is important because actions in one trigger may affect the actions in another.

To reorder the list of triggers

1. Select **Manage > Triggers and mail notifications**.
2. Click **Reorder**. You will find this at the end of the list of active triggers.
3. Click and drag triggers to new locations as needed.
4. Click **Done**.

Editing and cloning triggers

You can edit and clone triggers. Cloning a trigger creates a copy that you can modify and use for some other purpose.

To edit a trigger

1. Select **Manage > Triggers and mail notifications**.
2. Locate the trigger you want to edit and select **Edit**.
3. Modify the title, conditions, and actions as needed.
4. Click **Update Trigger**.

To clone a trigger

1. Select **Manage > Triggers and mail notifications**.
2. Locate the trigger you want to clone and select **Clone**. This command appears when you move your mouse over the trigger in the list of triggers.
3. Enter a new name for your trigger and modify the conditions and actions as needed.
4. Click **Add Trigger**.

Deleting and deactivating triggers

If you decide that you no longer need a trigger you can either delete it or deactivate it. Deleting it of course means that it's gone and can't be retrieved. You can instead deactivate triggers. Deactivated triggers are listed in a separate table on **Manage > Triggers and email notifications** and can be reactivated if needed.

To delete a trigger

1. Select **Manage > Triggers and mail notifications**.
2. Locate the trigger you want to delete and select **Edit**.
3. Click **Delete**.

To deactivate/activate a trigger

1. Select **Manage > Triggers and mail notifications**.
2. Locate the trigger you want to deactivate and select **Deactivate**. This command appears when you move your mouse over the trigger in the list of triggers. The trigger is deactivated and displayed in the list of inactive triggers.
3. To reactivate the trigger, select it from the list of inactive triggers and select **Activate**.

Streamlining workflow with time-based events and automations

Automations are similar to triggers (see *Streamlining workflow with ticket updates and triggers*) because both define conditions and actions that modify ticket properties and optionally send email notifications to customers and the support staff. Where they differ is that automations run when a time event occurs (from one hour to 28 days) after a ticket property was set or updated, rather than immediately after a ticket is created or updated.

Only admins can create and manage automations.

Automations help you to manage the workflow and measure performance because they can alert you to tickets that remain unresolved and need to be escalated (for example). Here are some common uses for automations:

- Notifying agents when an assigned ticket remains unresolved for x number of hours
- Notifying agent groups when a new ticket remains unassigned for x number of hours
- Notifying the assigned agent after x number of hours when a pending ticket has been updated by the requester
- Closing tickets x number of days after they have been set to solved

Zendesk provides an automation that demonstrates one of these common uses, as shown here:

This automation closes tickets 96 hours after they have been solved (96 hours is a help desk best practice for the minimum amount of time a ticket should remain in the solved state before it is closed). When the automation runs, any tickets that meet these criteria are closed. The close action looks like this:

Note: This example also illustrates an important rule of automations, which is: ***an automation must contain an action that cancels a condition***. The 'Status equals Solved' condition is canceled by the 'Status equals Closed' action. If there were no canceling action in this trigger, the automation would continue to fire in an endless loop because the status would remain solved (not closed) and would therefore continue to meet the condition criteria. If this trigger also contained an email notification action, the requester would continue to receive the same notification emails until the automation was aborted.

Unlike triggers, automations do not run whenever a ticket is updated. Automations run once every hour and only on tickets that have been updated in the last 30 days.

Note: All automations are run at the top of the hour in batches for all Zendesk customers. When exactly your automations run depends on how many automations and tickets there are to process. For example, if a ticket was updated at 10am and your automation is set to run an hour later, it might be slightly longer than that (11:04 or 11:10, etc.). Automations don't run exactly x number of hours after the conditions are met.

The order of your automations is important as well because all automations run (first to last) every hour. When you create an automation, it is by default added to the end of the list of automations. You can reorder the list of automations but you should only do so if you understand how the other automations work and what actions they contain, because an action in an automation can change the result of an action in another automation or cause a trigger to be fired. For more information, see *Reordering your automations*.

Creating automations

Admins can create automations from scratch, as shown here, or create copies of existing automations and then modify and use them for some other purpose (see *Editing and cloning automations*).

To add an automation

1. Select **Manage > Automations**.
2. Select **Add Automation**.
3. Enter a title for your automation.
4. Add the conditions and actions for your automation (described below).
5. You can test your automation by previewing the tickets that match the conditions that you have specified by selecting **Preview match for the conditions**.
6. Save your new trigger by clicking **Add Automation**.

Building automation condition statements

As with triggers, the condition statements you create for automations contain conditions, operators, and values. These include conditions you'd expect such as priority, status, assignee and so on. Because automations are based on the hours that have elapsed since a ticket update was made, Zendesk provides the following time-based conditions:

- Hours since created
- Hours since opened
- Hours since pending
- Hours since solved
- Hours since closed
- Hours since assigned
- Hours since update
- Hours since requester update
- Hours since assignee update
- Hours since due date (for tickets with the type set to Task)

Only whole numbers can be used as the value for these conditions. For example, Hours since created = (calendar) is = 1, is valid. Decimals aren't supported. If you set the hours since variable to 1.5, it will be interpreted as 1, which means that it was rounded down to the whole number.

The other conditions you can use in your automations are described in the following table.

Table 13: Automation conditions

Conditions	Description
Status	The ticket status values are: **New** is the initial status of a newly created ticket (not assigned to an agent). **Open** means that the ticket has been assigned to an agent. **Pending** is used to indicate that the requester has been asked for information and the ticket is therefore on hold until that information has been received. **Solved** indicates that the customer's issue has been resolved. Tickets remain solved until they are closed. **Closed** means that the ticket has been locked and cannot be reopened or updated. When selecting a status, you can use the field operators to specify a range of tickets based on their status. For example, a condition statement that returns only New, Open, and Pending tickets looks like this: Status is less than Solved
Type	The ticket type values are: **Question** **Incident** is used to indicate that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the other tickets that are reporting the same problem are set to Incident and linked to the problem ticket. **Problem** is a support issue that needs to be resolved. **Task** is used by the support agents to track various tasks.
Priority	There are four values for priority: **Low**, **Normal**, **High**, and **Urgent**. As with status, you can use the field operators to select tickets that span different priority settings. For example, this statement returns all tickets that are not urgent: Priority is less than Urgent
Group	The group values are: (—) indicates that no group is assigned to the ticket. **(assigned group)** is the group that is assigned to the ticket. **Group name** is the actual name of the group that is assigned to the ticket.
Assignee	The assignee values are:

Conditions	Description
	(current user) is the last person to have updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated. And an update may have been made by the assignee, the requester, or someone who was CC'd on the ticket.
	(requester) is the ticket requester. You can select this option to return tickets that were opened by and then assigned to the same agent, for example.
	(assignee) is the person who is assigned to the ticket.
	Agent name is the actual name of the person assigned to the ticket.
Requester	The requester values are:
	(current user) is the last person to have updated the ticket.
	(requester) is the ticket requester.
	(assignee) is the person assigned to the ticket. The condition statement 'Requester is Assignee' is true if the requester is also the person assigned to the ticket. This is possible if an agent created a ticket and was then assigned to it.
	Agent name is the actual name of the agent.
Organization	The organization values are:
	(—) is used to indicate that no organization has been added to the ticket.
	Organization name is the name of an organization.
Tags	You use this condition to determine if tickets contain a specific tag or tags. You can include or exclude tags in the condition statement by using the operators **Contains at least one of the following** or **Contains none of the following**. More than one tag can be entered. They must be separated with a space.
Description	The description is the first comment in the ticket.
Ticket source	The ticket channel is where and how the ticket was created and can be any of the following: - Web form - Email - Chat - Twitter - Twitter DM (direct message) - Twitter Favorite - Voicemail - Phone call (incoming) - Get Satisfaction

Conditions	Description
	• Feedback Tab • Web service (API) • Trigger or automation • Forum topic • Closed ticket • Ticket sharing
Ticket is	Created or Updated.
Ticket received at	You use this condition to determine the email address from which the ticket was received. Zendesk allows you to forward emails to any address at your Zendesk subdomain. For example: sales@mondocam.com --> sales@mondocam.zendesk.com support@mondocam.com --> support@mondocam.zendesk.com
Ticket Satisfaction	This condition returns the following customer satisfaction rating values: • **Unoffered** means that the survey has not previously been sent • **Offered** means that the survey has already been sent • **Bad** means that the ticket has received a negative rating • **Good** means that the ticket has received a positive rating
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as conditions. You can select the drop-down list values and Yes or No for checkboxes.

Building automation action statements

Action statements define what occurs if all the condition statements are true and the trigger fires. You can think of action statements as 'then' statements – *if* all of your conditions are true *then* invoke these actions to update the ticket and optionally send notifications.

Table 14: Automation actions

Status	
	The ticket status can be set to the following: **New** is the intitial status of a newly created ticket (not assigned to an agent). **Open** means that the ticket has been assigned to an agent. **Pending** is used to indicate that the requester has been asked for information and the ticket is therefore is on hold until that information has been received. **Solved** indicates that the customer's issue has been resolved. Tickets remain solved until they are closed. When tickets are closed is based on business rules you define for this step in the workflow, using automations.

	Closed means that the ticket has been locked and cannot be reopened or updated.
Priority	The priority can be set to **Low**, **Normal**, **High** or **Urgent**
Type	The type can be set to the following:
	Question
	Incident indicates that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the other tickets that are reporting the same problem are set to Incident and linked to the problem ticket.
	Problem is a support issue that needs to be resolved.
	Task is used by the support agents to track various tasks.
Group	You can set groups to any of the following:
	(—) is used to unassign a group (if one has already been assigned)
	(current user's groups) is all the groups to which the agent who is updating the ticket belongs.
	Group name is the actual name of the group that is assigned to the ticket.
Assignee	You can set the assignee to any of the following:
	(—) is used to set assignee to no one (unassigned)
	(current user) is the last person to have updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated.
	(requester) is the ticket requester. You can select this option to return tickets that were opened by and then assigned to the same agent, for example.
	(assignee) is the person who is assigned to the ticket.
	Assignee name is the actual name of the person assigned to the ticket.
Ticket Satisfaction	You can set this action to: **offered to requester**. This indicates that the survey request has been sent to the ticket requester.
Set tags	The tags you want to insert into the ticket. The set tag action replaces the current tags. Tags must be separated with spaces.
Add tags	The tags you want to add to the existing list of tags (if any). Tags must be separated with spaces.
Remove tags	The tags that you want removed from the existing list of tags contained in the ticket (if any). Tags must be separated with spaces.
Email user	You can set the email user to any of the following:

	(current user) is the last person who updated the ticket.
	(requester) is the ticket requester.
	(assignee) is the agent assigned to the ticket.
	(all non-restricted agents) includes all agents that have unrestricted access to the ticket.
	Email user name is the actual registered name of the person who will receive the email.
	Adding the email user action also inserts the email subject and body.
Email group	You can set email group to any of the following:
	(—) is used to set the email group to none.
	(assigned group) is a reference to the assign group.
	Email group name is the actual name of a group.
Notify target	Set the external target to notify. For more information about using targets, see *Notifying external targets*.
Tweet requester	Setting this action allows you to respond to the twitter requester with a tweet.
Add cc	Add an agent or end-user to copy on the ticket update. This action is available when you enable CCs on tickets (**Settings > Tickets > Enable CCs on Tickets**).
Share ticket with	Select a help desk to share the ticket with. See *Sharing tickets between networked help desks*.
Set requester's language to	Set the requester's language to one of your supported help desk languages.
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as actions. You can select the drop-down list values and Yes or No for checkboxes.

Editing and cloning automations

You can edit and clone automations. Cloning an automation creates a copy that you can modify and use for some other purpose.

To edit an automation

1. Select **Manage > Automations**.
2. Locate the automation you want to edit and select **Edit**.
3. Modify the title, conditions, and actions as needed.
4. Click **Update Automation**.

To clone an automation

You can create a copy of an existing automation to use as the basis of a new automation.

1. Select **Manage > Automations**.

2. Locate the automation you want to clone and select **Clone**. This command appears when you move your mouse over the automation in the list of automation.
3. Enter a new name for your automation and modify the conditions and actions as needed.
4. Click **Add Automation**.

Reordering your automations

You can reorder your automations, but keep in mind that the order of your automations is important because all automations run (first to last) every hour. Actions in one automation may affect the actions in another.

To reorder the list of automations

1. Select **Manage > Automations**.
2. Click **Reorder**. You'll find this at the end of the list of active automations.
3. Click and drag automations to new locations as needed.
4. Click **Done**.

Deleting and deactivating automations

If you decide that you no longer need an automation you can either delete it or deactivate it. Deleting it of course means that it's gone and can't be retrieved. You can instead deactivate automations. Deactivated automations are listed in a separate table on **Manage > Automations** and can be reactivated if needed.

To delete an automation

1. Select **Manage > Automations**.
2. Locate the automation you want to delete and select **Edit**.
3. Click **Delete**.

To deactivate/activate an automation

1. Select **Manage > Automations**.
2. Locate the automation you want to deactivate and select **Deactivate**. This command appears when you move your mouse over the automation in the list of automations. The automation is deactivated and displayed in the list of inactive automations.
3. To reactivate the automation, select it from the list of inactive automations and select **Activate**.

Using placeholders

Placeholders are references to ticket and user data that you include in the subject and text of email notifications. Without them it would be impossible to create automated messages. Here's an example of how placeholders are used in an email notification:

The placeholders are contained within matched double curly brackets and are, in this example, references to ticket properties. When you're composing email notifications, you can view the list of placeholders by clicking **View Available Placeholders**.

For the complete list of placeholders, see *Zendesk data object (placeholders) reference*.

Placeholders for custom fields

Placeholders are generated automatically by Zendesk, based on the ticket and current user properties. These are referred to as system placeholders. When you add custom fields, they are also available as placeholders. Custom fields are not included in the list of available placeholders, but they follow this simple naming pattern:

```
{{ticket.ticket_field_<field ID number>}}
```

For example, a custom field like this has the following placeholder:


```
{{ticket.ticket_field_505156}}
```

When you create custom fields an ID is automatically generated. You can find the ID for a custom field by selecting **Manage > Ticket Fields**, locating your custom field in the list, and then clicking **Edit**. The ID is displayed in the right column, as shown here:

Edit text field

Custom field ID: **505156**

The placeholder name for the options in a custom drop-down list follows a different pattern:

```
{{ticket.ticket_field_option_title_<field ID number>}}
```

For example, the placeholder for a drop-down list would look like this:

my custom drop-down list

✓ –

Mondocam XD–80
Mondocam ZD–89
Mondocam XG–540

```
{{ticket.ticket_field_option_title_515416}}
```

There's only one placeholder for all three drop-down list options because this is a reference to the option that was selected. The ID is for the custom drop-down list because options do not have IDs. Again, this is a reference to the single option that was selected.

You can use the placeholders for your custom fields as you would any other system placeholder.

Using tags

You can apply tags to tickets, forum topics, users, and organizations (for information about tagging users and organizations see *Adding tags to users and organizations*). Tags are simply words or combinations of words you can use to add more context to tickets and topics. As an example, you might want to tag all requests that are actually sales inquiries with a tag like 'sales' or 'about_sales'. You can then create a view or a report to track all these requests.

Tags

forums ×   defective ×   faq ×   installation ×   about_sales ×

Note: You can create tags with more than one word but the words must be connected with an underscore, as shown above.

Tags provide you with an unlimited amount of flexibility to manage and customize your help desk workflow. Here are the ways you can use tags:

* Add tags to tickets, either manually or automatically, and use those tags to create custom workflows.
* Add tags to user and organizations (see *Adding tags to users and organizations*)
* Browse tickets by tag.
* Use tags in your business rules (automations, macros, and triggers) to create custom workflows.
* Create views and reports by tags.
* Follow RSS feeds for tags.
* Quickly assess tag use to understand support request trends using the top 100 tag cloud.

Tags can be added to tickets automatically based on keywords in ticket descriptions that match existing tags already used in your help desk. Tags that have been added to users and organizations are also automatically added to tickets. You can also create business rules to add tags to tickets and agents can add them manually.

Automatic ticket tagging

When you enable automatic ticket tagging (see *Setting tagging options*), Zendesk scans new incoming ticket descriptions looking for words longer than two characters and then compares those words to the tags that have already been used in your help desk. The top three matches are added to the ticket. You can then use those tags in your business rules to, for example, automatically route tickets to specific groups or agents.

Keep in mind that if you inadvertently add tags for high frequency words such as 'and' and 'the' these words will generate tags in your tickets, which will make automatic tagging a much less useful tool. To manage this, avoid creating tags for these types of words or delete them if you've already created them (see *Deleting tags*).

Tags are only added to tickets that come from end-users via the ticket channels. Tags will not be added if an agent submits a ticket from within the help desk.

Setting tagging options

Automatic tagging is enabled by default, but you can disable automatic tagging if you'd like (see *Understanding automatic tagging* above).

To disable/enable automatic ticket tagging

1. Select **Settings > Tickets**.
2. In the **Tags** section of the settings tab, deselect the **Enable automatic ticket tagging** option.
3. Click **Save Changes**.

If you disable automatic tagging, you can still add tags manually.

You can also turn off manual tagging (the tags input field will not be displayed on the new ticket screen). You might do this if you rely solely on automatic tagging or if you simply don't use tags in your help desk.

To disable/enable manual ticket tagging

1. Select **Settings > Tickets**.
2. In the **Tags** section of the settings tab, deselect the **Enable tags on tickets** option.
3. Click **Save Changes**.

The existing tags, if any, that were applied to tickets will remain; you'll just be unable to add any new tags.

Manually adding tags to tickets and forum topics

Agents can manually add tags to tickets. Depending on how you've set up your help desk workflow, you may want agents to add tags to provide more context for the request so that tickets can be viewed and tracked and perhaps acted on by your business rules.

As your tag set grows, agents can view a list of top 100 most active tags by selecting **Manage > Tags**. Zendesk also displays your tags when entering them into tickets and forum articles, as shown here:

As you type into the tag field, auto complete displays tags beginning with the same word or characters.

To manually add tags to a ticket

1. Create or edit a ticket.
2. Enter new tags into the tag field as needed. Enter a space after each tag.
3. Click **Add Ticket** or **Update Ticket** (if editing a ticket).

It's the same procedure for adding tags to forum topics; enter them and then add or update the topic.

Deleting tags

You can edit tickets and forum articles to manually delete tags. If you want to remove tags that have been applied to many tickets and topics, you can do this in a batch operation.

To delete a tag from all tickets and forum topics

1. Select **Manage > Tags** to view the top 100 tag cloud.
2. Click on the tag that you want to delete.
3. On the tag activity detail screen, click **Remove tag [tag name] from all topics and open tickets**.
4. Click **OK** to confirm that you want to proceed.

Tags cannot be deleted from closed tickets, which also means that a tag you deleted may still appear in the tag cloud until the closed tickets that contain the tag are retired out of the list. Also, deleting tags does not remove references to them in automations, macros, and triggers.

Note: The tag cloud displays the 100 most used tags during the past two months. This means that your less actively used tags will not be displayed in the top 100 tag cloud. If you want to delete these tags, you can search for the tags (see *Searching for tickets by tag*) and delete them manually from the tickets and topics that you have access to.

Analyzing tag activity

Zendesk provides you with a view into the tags that have been applied to your tickets. You can view a top 100 tag cloud of the most active tags over the last two months. This list is updated once a day.

To view the top 100 tag cloud

• Select **Manage > Tags**.

You can click a tag in the cloud to display the list of tickets that it has been added to. You can also view all the forum topics that the tag has been used in.

Creating views based on tags and tag sets

You can add tags as conditions in views, which enables you to quickly view all tickets that contain specific tags.

To create views by tags

1. Select **Manage > Views**.
2. Select the **tags** condition.
3. Choose the condition operator **Contains at least one of the following.**
4. Enter one or more tags (separated with a space).
5. Add any other conditions that you'd like (for example, adding a condition for open tickets).
6. Set the view formatting options as needed.
7. Click **Add View**.

Your new view is listed in the **Views** menu in Zendesk.

Searching for tickets by tags

You can search for tags contained in tickets and forum articles. Using the help desk search box, enter the name of the tag and the search results will display all the tickets and forum articles that contain the tag.

You can further improve your search results for tags by using property keywords in your searches. For tags, the property keyword is called 'tags' and is used like this:

```
tags:installation
```

Your search results will contain only occurrences of the word 'installation' when used as a tag.

Note: When searching for tags, you must use the exact tag string or your search will fail. For example. if you've got a multi-word tag called about_sales a search for sales will not return this tag. You need to search for the exact string:

```
tags:about_sales
```

Using tags in macros, triggers, and automations

Adding tags to your tickets gives you even more flexibility to track, manage, and interact with your tickets. They can be used to attach additional data to your tickets, which you can then use in your automations, macros, and triggers.

As an example, let's look at how a tag can be used in a trigger. If you use email subdomains, you may have set up a subdomain to track the tickets that are generated through responses to your newsletter. You can set up a trigger to check for the origin of the ticket using the **Ticket received at** condition, as shown here:

Meet all of the following conditions:

| Ticket is... | Created | ➖ |
| Ticket received at... | newsletter | @support.zendesk.com | ➖ |

Add condition ➕

You can then add an action that adds a tag to the ticket, as shown here:

Perform these actions:

| Set tags | newsletter_replies | ➖ |

Add action ➕

You can then use this tag to create a view that shows you all the tickets that have been created from newsletter responses. You can also use the tag as a condition or an action in some other automation, macro, or trigger. For example you might want to exclude this tag for some reason when you're defining the selection of tickets you want to be acted on by a trigger, as shown here:

Meet all of the following conditions:

Status	Is	New	➖
Tags	Contains none of the following	newsletter_replies	➖
Add condition			➕

Dropdown custom fields also create ticket tags and they can also be used in automations, macros, and triggers as well. See *Build custom workflows with tags* in the Zendesk forums for an example of how custom field tags can be used in a trigger.

Filtering business rules

The Plus+ and Enterprise versions of Zendesk provide you with tools for filtering your business rules, giving you greater insight into how your automations, macros, triggers, and views are used.

Automations, macros, and triggers can be sorted based on the following criteria:
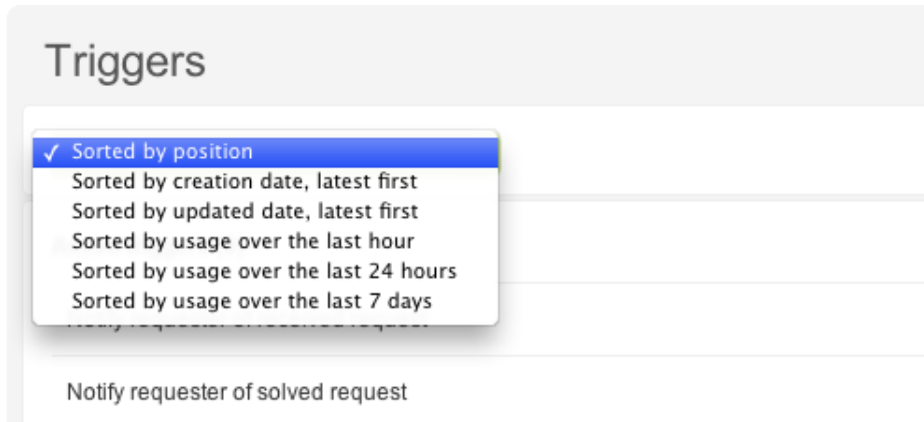
Views can be sorted by the dates they were created and updated (**Sorted by creation date, latest first** and **Sorted by updated date, latest first**).

Sorting shared macros and views

Shared views and shared macros can also be sorted by the groups to which they are available. For example, if you create macros that are only available to specific groups, you can sort them based on those availability settings.
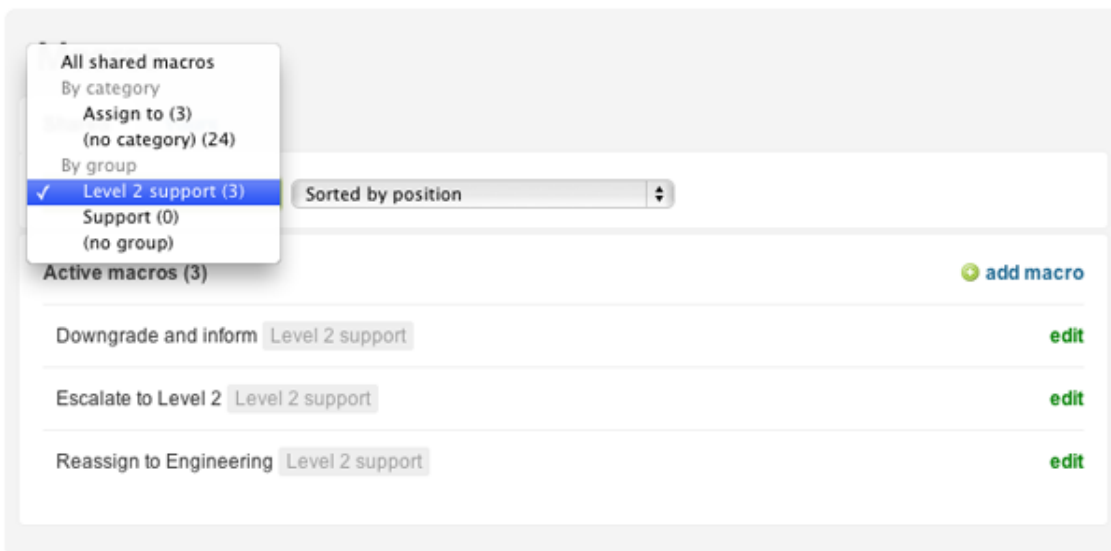
Sorting macros by category

As described in *Organizing your macros*, you can create up to three levels of categorization within your macro titles by using two colons to separate categories, as shown here:

Macro title

Assign to::me::question

You can then sort your macros using those categories.

Macros

Shared   Yours

Assign to (3)   Sorted by position

Active macros (3)   add macro

Assign to::me::incident   edit

Assign to::me::problem   edit

Assign to::me::question   edit

Notifying external targets

You can notify external targets when a ticket is created or updated. External targets are cloud-based applications and services (such as Twitter and Twilio) as well as HTTP and email. Here are some examples of how and why targets are used:

- Sending an SMS text message when an urgent ticket has been unattended for more than 48 hours
- Sending a notification to a Twitter stream when a new urgent ticket is created
- Creating a Salesforce case from a ticket
- Synchronizing ticket comments in a JIRA bug base

Those are just a few examples. See *Setting up a target* below for more information about the targets available in Zendesk.

Targets are used in automation and trigger actions. First you configure a target and then you specify the target using the **Notify target** action.

Setting up a target

In addition to generic targets for HTTP and email targets, Zendesk provides you with predefined targets for the following well-known cloud-based applications and services:

Table 15: Targets

Atlassian JIRA	The JIRA target allows you to push comments made in Zendesk tickets to JIRA so that you can keep associated tickets synchronized.
Basecamp	Using the Basecamp target, you can push ticket updates to a project as: • New messages in a project • New comments in a specific message • New ToDo list • New ToDo item in a specific todo list You need to enable API access in your Basecamp account to use this target.
Campfire	Send notifications to a Campfire chat room.
Clickatell	Use this target to send SMS messages using your Clickatell account. Follow the steps in Clickatell HTTP API Guide to setup the account, add a HTTP connection and obtain an API ID.
Get Satisfaction	Post public comments to Get Satisfaction topics for tickets created using the Zendesk moderator tool in Get Satisfaction. By creating this target, Zendesk will automatically create the necessary triggers and views and also add a useful widget in the home and ticket pages (you can remove those widgets if you don't need them).

Pivotal Tracker	Create stories in Pivotal Tracker from a Zendesk ticket to easily prioritize support issues in your project backlog.
	The Pivotal Tracker target sends the Zendesk ticket ID to Pivotal Tracker when creating a new story.
	If you have enabled Pivotal Tracker's native Zendesk integration in the target Tracker project, a link back to the Zendesk ticket is created in the new story.
Salesforce	Create a Salesforce case from a Zendesk ticket.
	When you set up this target, Zendesk automatically creates an example trigger for you.
Twillio	Use this target to send SMS messages to a mobile phone using your Twilio account.
Twitter	Send notifications to a Twitter stream.
	Note: Make sure that you protect your twitter stream if you don't want notifications to be readable by the general public.
Yammer	Send notifications to a Yammer stream.
	Follow the steps in this Yammer Target Guide to create a client application in Yammer and authorize this target to use the Yammer API. For more information, see *Yammer targets*.

Note: To set up many of these external targets, you'll need to consult their documentation. Some targets, such as Twitter, merely require that you authorize your account before you can begin posting messages.

To add a target

1. Select **Settings > Extensions > Targets.**
2. Select **Add target**.
3. All of the target options are listed. Select the type of target and enter the required target information (which varies from target to target).
4. Click **Create Target**.

Managing your targets

Once you've set up targets, you can edit, delete, and deactivate and reactivate them.

To edit a target

1. Select **Settings > Extensions > Targets**.
2. Locate the target you want to edit and click **Edit**.
3. Make your changes and then click **Update Target**.

To delete a target

1. Select **Settings > Extensions > Targets**.

2. Locate the target you want to edit and click **Edit**.
3. Select **Delete Target**.

To deactivate/reactivate a target

1. Select **Settings > Extensions > Targets**.
2. Locate the target you want to deactivate and select **Deactivate**.
3. To reactivate the target, select it from the list of inactive targets and select **Activate**.

Using targets in automations and triggers

Once you've set up targets, you can use them in automations and triggers. Here's an example of a trigger that notifies a Twitter account when an urgent ticket is created:

Since you're interacting with external targets, there may be a delay between when a trigger or automation runs and when you'll see the results in the external target6 (in the example above, that would be your Twitter home page or stream).

Zendesk attempts to send the notification 10 times. If all attempts fail, the target is deactivated. You'll then need to edit and test and reactivate the target before you can try to use it again.

Chapter

6

Views, reporting, and performance

- *Using views to manage ticket workflow*
- *Monitoring ticket activity and performance with reports*
- *Using customer satisfaction ratings*

Using views to manage ticket workflow

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

Many help desks use views to guide the workflow by requiring agents to address tickets in one view first and then others in a specific order. Views can also mirror the support structure you've created. For example, if you provide different levels of service for different customers or manage escalation using a tiered support group structure (Level 1, Level 2), you can create views for every one of these scenarios.

Zendesk provides you with a set of views for the essential day-to-day running of your help desk. 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 as is, modify them, or deactivate them.

Views, like other business rules such as triggers and automations, use conditions to define a set of tickets. Once you've created a view based on conditions, you've got a list of tickets that meets that criteria.

All unsolved tickets (22)

List | Table | CSV | RSS | Edit

Organization	Score	Subject	Requester	Requested	Type	Priority	
Status New							
-		DSLRs as movie cameras	Sammy	May-12	-	-	☐
-		Need a new license key	Mary Jones	May-11	-	-	☐
-		@mondocam Is this article still true since	John M Chou	May-12	-	-	☐
-		I was charged twice for my camera.	Mary Jones	May-12	Problem	-	☐
-		Lost my user manual	Siena Nenners	May-12	-	-	☐
Status Open							
-	☐	hello. my pictures come out all black.	Emily Wilcox	May-12	Question	High	☐
-	▪	can't see my pictures...	Paul Moseley	May-11	Question	High	☐
-	■	Help me!	Bob Jensen	May-10	-	High	☐
-	■	The shutter does not appear to be	Aleigh77	May-12	Problem	High	☐
-	▪	Time Lapse Photography?	Mary Jones	May-12	Question	High	☐
-	▪	DSLR Help	Emily Wilcox	May-12	Question	High	☐
-		I have a double charge on my credit card	Mary Jones	May-12	-	High	☐
-	▪	Where can I buy a ZD 89	Aleigh77	May-12	Question	High	☐
-		having problems with my DSLR, need	Obie Fernandez	May-12	-	High	☐
-	▪	my surveillance camera isn't working	Paul Moseley	May-12	Question	High	☐

« Previous   1   **2**   Next »

Views can be displayed as a table (shown above) and as a list, which simply shows the ticket title and the most recent comment. When viewing tickets in a table, positioning your mouse over a ticket title displays essential data about it, as shown here:

Problem #99 (open/high/assigned)

It is slow to open and close, causing distorted images.

Submitted from: http://www.zendesk.com/demo-website/

———————————————— Latest comment – May-10 16:13 ————————————————

This is a known issue and we expect to provide a fix in June. Please see a local dealer for the free repair.
Anneke
Love Your Helpdesk!

Also, when viewing tickets in the table format you can select one or more tickets and update them in the view, as in this example:

Views are created and can be managed by selecting **Manage > Views**. This is available to both admins and agents. Quick access to views is available by clicking the **View** tab in the menu bar.
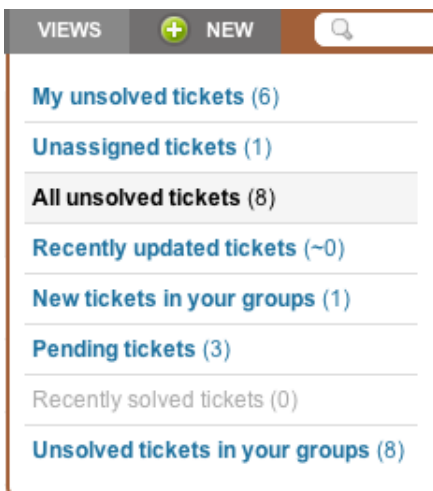
The **View** tab displays the first 12 of your shared views and 8 of your own views. If you have more views than this, the rest of your views can be quickly accessed by clicking the **More** link at the bottom of the list. You can select the views you want to include in the **View** tab by setting the order of the views on the **Manage > Views** page.

Aside from the standard help desk views and the views you add yourself, Zendesk may add new views when features are added to the help desk. For example, enabling customer satisfaction rating adds a view. If you use SLA service targets, you'll also see those available as views in the **Views** tab.

Note: A Views widget is also available that you can add to many pages of the help desk. See *Adding the Ticket Views widget*.

Like macros, there are two kinds of views, shared and personal. Admins can create shared views and agents can create their own (personal) views. Shared views can be made available to all agents or agents in a specific group.

Adding views

Admins can create shared views and agents can create their own (personal) views.

To add a view

1. Select **Manage > Views**.
2. Click **Add New**.
3. Add the conditions you want to select a collection of tickets (conditions are described below).
4. You can test the conditions by selecting **Preview match for the conditions above**.
5. Set the formatting options (described below).
6. Set the view's availability (described below).
7. Click **Create**.

Views can be managed (edited, deactivated, and so on) in **Manage > Views**.

Building view condition statements

As with the other business rules, you select collections of tickets using conditions, operators, and values.

Table 16: View conditions

Condition	Description
Status	The ticket status values are:
	New is the initial status of a newly created ticket (not assigned to an agent).
	Open means that the ticket has been assigned to an agent.
	Pending is used to indicate that the requester has been asked for information and the ticket is therefore on hold until that information has been received.
	Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed.
	Closed means that the ticket has been locked and cannot be reopened or updated.
	When selecting a status, you can use the field operators to specify a range of tickets based on their status. For example, a condition statement that returns only New, Open, and Pending tickets looks like this:
	Status is less than Solved
Type	The ticket type values are:
	Question
	Incident is used to indicate that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the

Condition	Description
	other tickets that are reporting the same problem are set to Incident and linked to the problem ticket.
	Problem is a support issue that needs to be resolved.
	Task is used by the support agents to track various tasks.
Priority	There are four values for priority: **Low**, **Normal**, **High**, and **Urgent**.
	As with status, you can use the field operators to select tickets that span different priority settings. For example, this statement returns all tickets that are not urgent:
	Priority is less than Urgent
Group	The group values are:
	(—) indicates that no group is assigned to the ticket.
	(current user's groups) is all the groups to which the agent who is updating the ticket belongs.
	(assigned group) is the group that is assigned to the ticket.
	Group name is the actual name of the group that is assigned to the ticket.
Assignee	The assignee values are:
	(current user) is the last person to have updated the ticket, which is not necessarily the same person who is assigned to the ticket. The current user (whoever updated the ticket last) changes whenever the ticket is updated. And an update may have been made by the assignee, the requester, or someone who was CC'd on the ticket.
	(requester) is the ticket requester. You can select this option to return tickets that were opened by and then assigned to the same agent, for example.
	(assignee) is the person who is assigned to the ticket.
	Agent name is the actual name of the person assigned to the ticket.
Requester	The requester values are:
	(current user) is the last person to have updated the ticket.
	(requester) is the ticket requester.
	(assignee) is the person assigned to the ticket. The condition statement 'Requester is Assignee' is true if the requester is also the person assigned to the ticket. This is possible if an agent created a ticket and was then assigned to it.
	Agent name is the actual name of the agent.
Organization	The organization values are:

Condition	Description
	(—) is used to indicate that no organization has been added to the ticket.
	Organization name is the name of an organization.
Tags	You use this condition to determine if tickets contain a specific tag or tags. You can include or exclude tags in the condition statement by using the operators **Contains at least one of the following** or **Contains none of the following**. More than one tag can be entered. They must be separated with a space.
Description	The description is the first comment in the ticket.
Ticket channel	The ticket channel is where and how the ticket was created and can be any of the following: • Web form • Email • Chat • Twitter • Twitter DM (direct message) • Twitter Favorite • Voicemail • Phone call (incoming) • Get Satisfaction • Feedback Tab • Web service (API) • Trigger or automation • Forum topic • Closed ticket • Ticket sharing
Ticket received at...	You use this condition to determine the email address from which the ticket was received. Zendesk allows you to forward emails to any address at your Zendesk subdomain. For example: sales@mondocam.com --> sales@mondocam.zendesk.com support@mondocam.com --> support@mondocam.zendesk.com
Ticket Satisfaction	This condition returns the following customer satisfaction rating values: • **Unoffered** means that the survey has not previously been sent • **Offered** means that the survey has already been sent • **Bad** means that the ticket has received a negative rating • **Good** means that the ticket has received a positive rating
Hours since...	This condition allows you to select tickets based on the hours that have passed since the ticket was updated in the following ways:

Condition	Description
	• Hours since created • Hours since opened • Hours since pending • Hours since solved • Hours since closed • Hours since assigned • Hours since update • Hours since requester update • Hours since assignee update • Hours since due date (for tickets with the type set to Task)
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as conditions. You can select the drop-down list values and Yes or No for checkboxes.

Set formatting options

A view's format can be set when you create the view and also when using the view. Select the default view formatting by setting the following options:

You can order the view by ticket properties such as priority and status, as well as by the active custom fields you've created.

Set the view's availability

Access to the view can be set with the following options:

Editing and cloning views

You can edit and clone views. Cloning a view creates a copy that you can modify and use for some other purpose.

To edit a view

1. Select **Manage > Views**.
2. Locate the view you want to edit and select **Edit**.
3. Modify the title and conditions as needed.
4. Click **Update View**.

To clone a view

1. Select **Manage > Views**.
2. Locate the view you want to clone and select **Clone**. This command appears when you move your mouse over the view in the list of views.
3. Enter a new name for your view and modify the conditions as needed.
4. Click **Add View**.

Deleting and deactivating views

If you decide that you no longer need a view you can either delete it or deactivate it. Deleting it of course means that it's gone and can't be retrieved. You can instead deactivate views. Deactivated views are listed in a separate table on **Manage > Views** and can be reactivated if needed.

To delete a view

1. Select **Manage > Views**.
2. Locate the view you want to delete and select **Edit**.
3. Click **Delete**.

To deactivate/activate a view

1. Select **Manage > Views**.
2. Locate the view you want to deactivate and select **Deactivate**. This command appears when you move your mouse over the view in the list of views. The view is deactivated and displayed in the list of inactive views.
3. To reactivate the view, select it from the list of inactive views and select **Activate**.

Reordering views

You can reorder your list of views, which affects what you see in the **Views** tab in the menu bar. Agents can only reorder their personal views. Admins can reorder their own views and all shared views.

To reorder the list of views

1. Select **Manage > Views**.
2. Click **Reorder**. You'll find this at the end of the list of active views.
3. Click and drag views to new locations.
4. Click **Done**.

Adding the Ticket Views widget

Your views can be displayed in a widget, which can be placed on any page in the help desk. Admins can add widgets.

To add the Views widget

1. Select **Settings > Extensions > Widgets**.
2. Click **Add Widget**.
3. Select the **Ticket Views** widget.
4. Enter a title for the widget.
5. Select the **Display** option to make it active.
6. Set the widget availability:

   - Anyone, incl. users who are not logged in
   - Agents
   - Logged in end-users

7. You can preview the widget by selecting **Preview Widget** and clicking **Submit**.
8. When you're finished, select **Create Widget** and click **Submit**.

You can add the Views widget to many pages in the help desk by selecting the **Edit widgets on this page**.

Monitoring ticket activity and agent performance with reports

Using reports, you can monitor daily ticket activity, agent performance, compliance with your service level agreements, average resolution times, and so on. Reports are detailed snapshots of collections of tickets within a time period. You can use many of the ticket properties to define the types of tickets that you want to monitor with a report. You can also define a time period based on your business hours.

Reports are created by admins and can be used by agents.

Note: For now, the information about using the advanced reporting capabilities of GoodData for Zendesk can be found here: *Build reports with GoodData for Zendesk*.

Reports consist of a graph and a data table, which are different views of the same day-to-day ticket activity within a set time period.
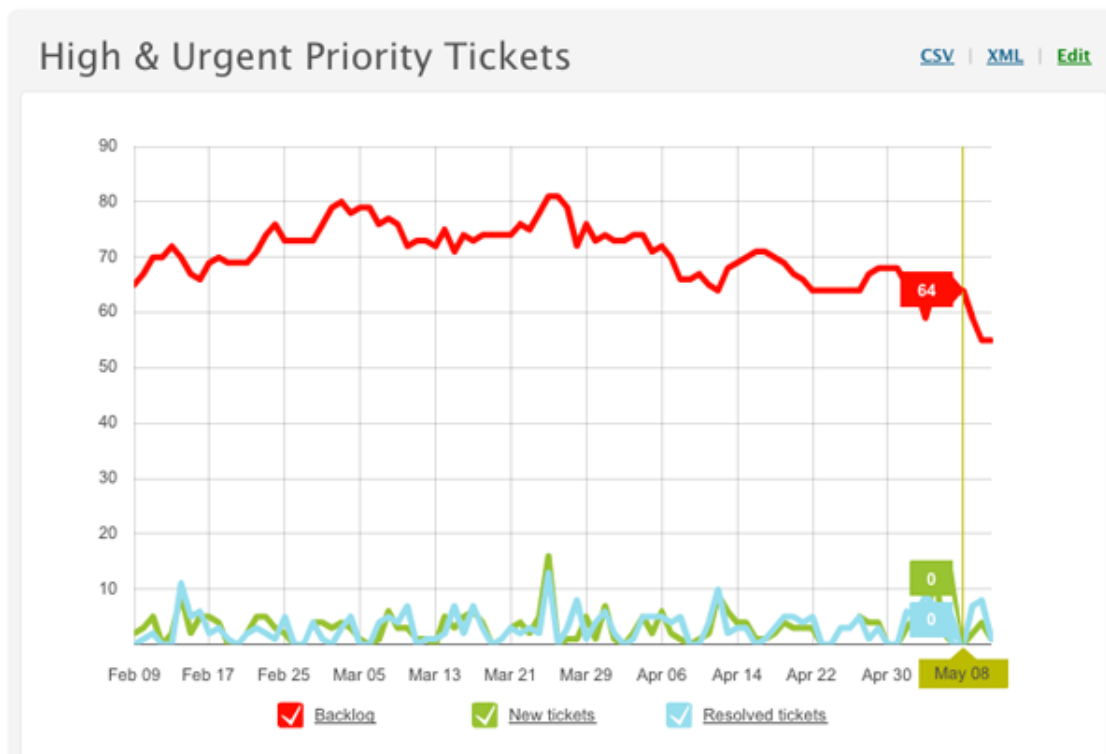
The report graph is a visual rendering of the data. If you place your mouse cursor over the graph, you'll see the totals for each data series for each day. The legend consists of the names of the data series that were added to the report. In this example, there are three data series that show all unsolved tickets (which includes new, open, and pending tickets), new tickets, and solved tickets.

Note: If you're wondering, there's no significance to the colors of the graph lines. You can add up to 8 data series to a report and each one is assigned a color to make the graph readable.

Date	Backlog	New tickets	Resolved tickets
Feb 09	65	2	0
Feb 10	67	3	1
Feb 11	70	5	2
Feb 12	70	0	0
Feb 13	72	2	0
Feb 14	70	9	11
Feb 15	67	2	5
Feb 16	66	5	6

The report table displays the same data but in a day-by-day table format. This is also the format that you can download as either a CSV (comma separated values) file or as an XML file. See *Exporting reports*.

Every report defines a time period and a set of conditions to select the set of tickets to be contained in the report. See *Creating reports*.

Zendesk reports to get you started

Zendesk provides you with a set of reports for day-to-day help desk management. To view these reports select **Manage > Reporting**. You can select **Edit** to see the time period and conditions that have been defined for each report.

Backlog Evolution

This report uses unsolved tickets as a baseline to compare against incoming new tickets and the daily rate of solved tickets over the last three months.

High & Urgent Priority Tickets

This report uses high and urgent unsolved tickets as a baseline to compare against incoming new high and urgent tickets and the daily rate of solved high and urgent tickets over the last three months.

Incident Evolution

This report displays tickets with the type set to Incident, comparing new incident tickets with resolved and unsolved incident tickets over the last 3 months.

Resolution Times

This report displays resolution times for solved and closed tickets over the last three months using three measurements of time: less than 2 hours, less than 8 hours, and less than 24 hours.

Ticket Priorities

This report displays tickets by priority groupings over the last 3 months. Tickets with low and normal priorities are grouped together as are tickets with high and urgent priorities.

You can use these reports as is or clone them to make copies that you can modify and repurpose. You can also edit these reports but it's better to clone them and make changes to the copies. You can't deactivate reports, but you can delete them if needed.

Creating reports

Only admins can create reports, agents cannot. Agents can view reports and export report data to downloadable files (see *Exporting reports*).

Reports consist of the following data elements:

- A reporting period, which specifies the time period for the report. For example, you might include tickets from the last week or between specific dates.
- One or more data series, which defines the set of tickets to be displayed in the report. You use conditions to select the set of tickets to display.

To create a report

1. Select **Manage > Reports > Add Report**.
2. Enter a report title.
3. Set the reporting period (described below).
4. Create one or more data series (described below).
5. To preview the report, select **Preview Report** and then click **Submit**.
6. To save the report, select **Create Report** and then click **Submit**.

You can generate the same report once every 30 minutes.

Setting the reporting period

The reporting period can be set in either of two ways: in time periods relative to today or by specifying a beginning and an end date.

The **Relative to today** option allows you to chose from these four periods of time:

- Last week
- Last two weeks
- Last month
- Last three months

The **Fixed date interval** option allows you to select a date range using specific start and end dates:

You can set a time period up to 3 months.

Building data series

You can include up to 8 data series in a report, each of which is shown as a column in a table and a graph (line) in a chart. Each data series must begin with one of the following ticket statuses:

- **Created tickets** (new)
- **Resolved tickets** (solved)
- **Unsolved tickets** (new, open, or pending)
- **Old tickets** (solved or closed)
- **All tickets** (all ticket statuses)

Each of these is used to report on tickets of these types for every day during the time period you set for the report. For example, on day one of the time period there may be one new ticket, on day two

seven new tickets, and day three no new tickets. A data series reports totals for every day of the time period, it's not a running total of the tickets for the entire time period.

In addition to selecting a ticket status, each data series can also include the conditions described in the following table to further define a set of tickets to display in the report.

Table 17: Data series conditions

Condition	Description
Priority	There are four values for priority: **Low**, **Normal**, **High**, and **Urgent**.
	As with status, you can use the field operators to select tickets that span different priority settings. For example, this statement returns all tickets that are not urgent:
	Priority is less than Urgent
Type	The ticket type values are:
	Question
	Incident is used to indicate that there is more than one occurrence of the same problem. When this occurs, one ticket is set to Problem and the other tickets that are reporting the same problem are set to Incident and linked to the problem ticket.
	Problem is a support issue that needs to be resolved.
	Task is used by the support agents to track various tasks.
Group	Select a group name.
Assignee	Select an agent.
Organization	Select an organization.
Tags	You use this condition to determine if tickets contain a specific tag or tags. You can include or exclude tags in the condition statement by using the operators **Contains at least one of the following** or **Contains none of the following**. More than one tag can be entered. They must be separated with a space.
Resolution time in hours	This is the total amount of time before the ticket was closed.
Ticket Satisfaction	This condition returns the following customer satisfaction rating values:
	• **Unoffered** means that the survey has not previously been sent
	• **Offered** means that the survey has already been sent
	• **Bad** means that the ticket has received a negative rating
	• **Good** means that the ticket has received a positive rating
Reopens	The number of times a ticket has moved from Solved to Open or Pending.
Agent replies	The number of public agent comments.
Group stations	The number of different groups to which a ticket has been assigned.

Condition	Description
Assignee stations	The number of different agents to which a ticket has been assigned.
First reply time in hours	The time between ticket creation and the first public comment from an agent. You can specify either calender hours or business hours.
First resolution time in hours	The time from when a ticket is created to when it is first solved. You can specify either calender hours or business hours.
Full resolution time in hours	The time from when a ticket is created to when it is solved for the last time. You can specify either calender hours or business hours.
Agent wait time in hours	The cumulative time a ticket has been in a Pending state (awaiting customer response). You can specify either calender hours or business hours.
Requester wait time in hours	The cumulative time that a ticket is in a New and Open state. You can specify either calender hours or business hours.
Custom fields	Custom fields that set tags (drop-down list and checkbox) are available as conditions. You can select the drop-down list values and Yes or No for checkboxes.

Exporting reports

Every report in your help desk can be immediately downloaded as either a CSV or XML file. Only admins can download reports, not agents.

To download a report

1. Select **Manage > Reporting**.
2. Select a report.
3. Select either **CSV** or **XML**. The files are immediately downloaded to your computer.

CSV files can be opened in spreadsheet applications like Microsoft Excel and OpenOffice.org Calc.

Exporting help desk activity reports (Plus+ accounts only)

Exporting help desk activity reports is available to Zendesk Plus+ accounts only. Only admins can export these reports.

The reports you can download include the following:

• Details for all tickets (excluding ticket comments) over the last 3 months in CSV format
• XML reports for the following:

   • **Accounts**, which is all the settings for your account
   • **Entries**, which is all the content added to your forums (including comments)
   • **Forums**, which is detailed information about your forum categories
   • **Groups**, which is detailed information about your groups
   • **Organizations**, which is detailed information about your organizations
   • **Posts**, which are responses to questions posted in your forums
   • **Tickets**, which are all the details (including comments) for all tickets over the last three months
   • **Users**, which is the list of all your users (end-users, agents, and admins).

These reports can be generated immediately, which is a snapshot of the data at the moment you select that option, or you can schedule builds of these reports or grab the latest report (previously generated by another admin or from the scheduled build, if you set one up).
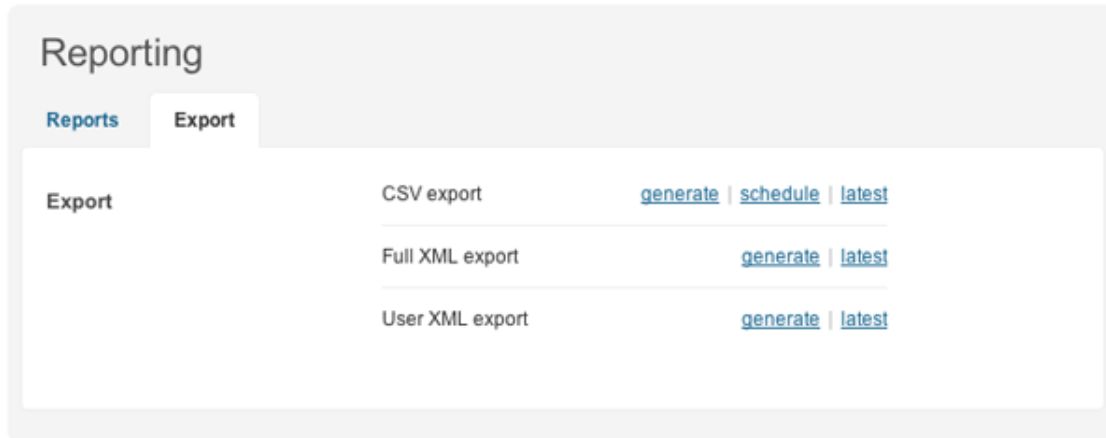
As mentioned above, the **CSV export** option generates a report of all tickets (excluding comments) over the last three months. This is the report that you can schedule to build automatically. The **Full XML export** option gives you all the reports shown above. The **User XML export** option is just the **Groups**, **Organizations**, and **Users** reports.

When you select to generate a report, a build is started and you are notified via email when it's complete. You can download a zip file containing the report(s). When you select the latest report, the most recently generated report is immediately downloaded as a zip file. The download link is valid for at least 3 days.

Note: These XML reports contain the same data that you can access with the Zendesk API. For example, the data in the **Users** report is the same XML data that would be returned using the GET command to access user data with the API. See *Zendesk REST API: Users*.

Scheduling the CSV export

The CSV export report can be scheduled to be built at any hour of the day. When it's complete, it's posted to a callback URL where you can access and download it using your username and password or a token. This is primarily used for the GoodData for Zendesk integration, but you can set this up to post the data to any callback URL. You need to configure your web server to do this. For more information, see *Download scheduled CSV using PHP*.

To schedule the CSV export

1. Select **Manage > Reporting > Export**.
2. For the **CSV export** option, select **Schedule**.

New CSV Export Schedule

Scheduled at: 12am ▼ The hour of the day that the export will start

Callback URL Where we post when your export is complete

http://

See the XML we will post to the callback url

Authentication method Used to retrieve your CSV export
⦿ **Basic**. Requires your username & password to access the export.
○ **Token**. Uses a uniquely generated value that is attached to export link, good for 3 days.

Create schedule ▼ Submit

3. Select the hour of the day you want the report to be generated, enter the callback URL, and select the authentication method.
4. Click **Submit**.

Editing and cloning reports

Admins can edit and clone reports. Cloning a report creates a copy that can be modified and used for some other purpose.

To edit a report

1. Select **Manage > Reporting**.
2. Locate the report you want to edit and select **Edit**.
3. Modify the title, time period, and data series as needed.
4. Click **Update Report**.

To clone a view

1. Select **Manage > Reporting**.
2. Locate the report you want to clone and select **Clone**. This command appears when you move your mouse over the report in the list of reports.
3. Enter a new name for your report and modify the title, time period, and data series as needed.
4. Click **Create Report**.

Deleting reports

Reports can be deleted. Only admins can delete reports.

To delete a report

1. Select **Manage > Reporting**.
2. Locate the report you want to delete and select **Edit**.
3. Select **Delete Report** and then click **Submit**.

Using customer satisfaction ratings

Your end-users (customers) can provide feedback about their experience with your help desk and support team by rating their solved tickets. When you enable customer satisfaction rating, by default, end-users receive an email 24 hours after the ticket has been set to solved that asks one simple question with two possible answers, as shown here:

How would you rate the customer service you received?

Good, I'm satisfied

Bad, I'm unsatisfied

The survey is designed to maximize the response rate by being quick and simple while also gathering the essential data: a positive or negative rating.

Logging in not required to rate tickets

End-users do not have to be logged in to the help desk to rate their tickets. Clicking a response link in the email opens a temporary URL to the ticket and prompts the end-user to rate the ticket and add a comment if they'd like, as shown here:

How would you rate the support you received?   **Good, I'm satisfied**   **Bad, I'm unsatisfied**

Add a comment about the quality of support you received (optional):

Cancel   Save my rating

In this example, the end-user clicked the 'Good, I'm satisfied' link so the Good button is shaded green to indicate that it is the selected rating. A comment can be added and the rating can be changed.

This ticket has been rated as   **Good, I'm satisfied**

With the following comment:
Very happy with the support. Thanks.

Hide comment   Change my rating

The temporary survey link only works once, so end-users can't click it again from the email to change their rating; however, they can change their rating while logged in to the help desk. The rating prompt is shown on all solved tickets in the help desk. So, your end-users can rate tickets without logging in or when they are logged in.

Ratings can be changed until the ticket is closed.

Additionally, the following rules apply to end-users when using satisfaction rating:

- End-users cannot opt-out of receiving survey requests.

- Satisfaction rating is per ticket, not per customer. End-users receive a survey request for each of their tickets that are solved.

When and how end-users are asked for a satisfaction rating via email is customizable. You don't have to send the request 24 hours after the ticket is solved, you can set a different time. Also, you can add the survey request in the email that is sent when a ticket is solved, rather than sending a separate email x number of hours later. You can also use business rules to be more selective about (include or exclude) which tickets generate the survey request.

Agents cannot rate tickets

Agents are not allowed to rate tickets, even if they are the ticket requester.

Sending the survey request

When you (an admin) enable satisfaction rating (see *Enabling customer satisfaction rating*), a system generated automation called **Request customer satisfaction rating** is added to your help desk. This automation sends the survey email 24 hours after the ticket is solved. You can of course customize this.

The email body in the automation uses a placeholder called {{satisfaction.rating_section}} to insert the survey question into the message, as shown here:

```
Hello {{ticket.requester.name}},

We'd love to hear what you think of our customer service. Please take a moment to
 answer one simple question below:

{{satisfaction.rating_section}}

Here's a reminder of what your ticket was about: {{ticket.comments_formatted}}
```

When customers receive the email, they simply click either the Good or Bad links and follow the steps described above.

For more details about the automation, see *Customer satisfaction rating automation*.

Use a trigger instead of the automation

Rather than use the automation to send the survey, you can deactivate it and use the {{satisfaction.rating_section}} placeholder in a trigger instead. You'd most likely add the survey request to your 'solved' trigger. The default 'solved' trigger in Zendesk is called **Notify requester of solved request**.

All you have to do is add the {{satisfaction.rating_section}} placeholder to the email body, as in this eaxmple:

```
Your request (#{{ticket.id}}) has been deemed solved.

To review, comment and reopen the request, follow the link below:
http://{{ticket.url}}

We'd love to hear what you think of our customer service. Please take a moment to
 answer one simple question below:

{{satisfaction.rating_section}}
```

```
{{ticket.comments_formatted}}
```

Using the solved trigger for the survey request means one less email to the end-user, if that's a concern for you. Using the automation and a separate email may yield better results because it is the focus of the email, not just an addition to the solved email.

Note: Rating a ticket does not change its status; it's not reopened or in any other way modified aside from capturing the rating.

How agents receive the satisfaction rating feedback

The results of customer satisfaction rating are shown in the help desk, in the agent's dashboard, and in a view called **Rated tickets from the last 7 days**.

Agents see, in their dashboard, the number of good and bad tickets for the last week and the overall satisfaction rating for the agent and the entire help desk over the last 60 days (including the current day).

Note: You must have the agent dashboard enabled to see the customer satisfaction ratings. An admin can do this by selecting **Settings > Agents > Agent Dashboard** and deselecting the **Hide** option.
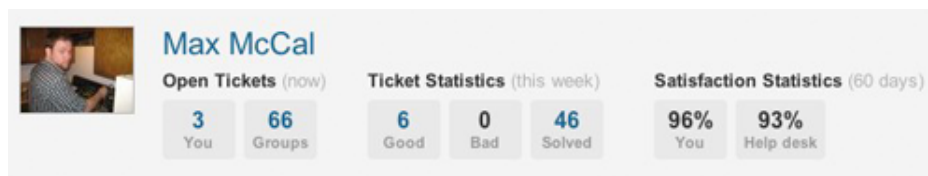
The calculation of the overall satisfaction rating uses the following simple formula:

$$\text{Score \%} = \frac{\text{Total Positive Ratings (60 days)}}{\text{Total of all Ratings (60 days)}} \times 100$$

This means that the score is an average of the total positive ratings from the past 60 days. An agent with a score of 90% means that over the past 60 days, 90% of the ratings they received were positive.

Agents, groups, and the account all have scores. The help desk score (in the example above, 93%) is the average for all agents in the help desk. The two ratings provide feedback about individual performance and the average performance of all agents in the help desk.

Note: An overall rating score will not be shown until 30 tickets are rated. This applies at the agent, group, and account levels. This means that an agent needs 30 ratings, a group (all agents within the group) needs 30 ratings, and the account (all agents in the help desk) needs 30 ratings.

The new view (**Rated tickets from the last 7 days**) gives you a quick overview of the rating activity, with a Satisfaction column containing both Good and Bad ratings. You can of course clone and modify this view or create your own.

The following rules apply to agents when using customer satisfaction rating:

- Agents cannot rate tickets.

- All agents see their ratings in their dashboard. This feature is enabled at the account level and applies to all agents in the help desk. You cannot exclude individual agents from receiving ratings on the tickets they are assigned to.

Additionally, ratings cannot be moderated. All ratings are shown in the help desk.

Enabling customer satisfaction rating

By default, customer satisfaction rating is disabled. It can be enabled by an admin.

To enable customer satisfaction rating

1. Select **Settings > End-users > Satisfaction**.
2. Select **Enable**.
3. Click **Save Tab**.

Your help desk is now set up to send your end-users the customer satisfaction rating email. Enabling this also creates a new automation called **Request customer satisfaction rating (System Automation)** and a view called **Rated tickets from the last 7 days**. Both can be modified as needed to suit your workflow.

Request customer satisfaction rating automation

The customer satisfaction rating automation, **Request customer satisfaction rating (System Automation)**, sends the survey request email 24 hours after a ticket has been solved.

Note: It's important to understand that this automation fires *at* 24 hours after the ticket is set to solved. The condition statement is *Hours since solved is 24* not *Hours since solved greater than 24*. This means that when you first enable customer satisfaction rating, none of the tickets that have been solved for more than 24 hours will generate a survey email to the requester. You can change this of course.

You'll notice that there's a Ticket Satisfaction condition as well. This condition has the following four values:

- **Unoffered** means that the survey has not previously been sent
- **Offered** means that the survey has already been sent
- **Bad** is the customer's negative rating
- **Good** is the customer's positive rating

Note: These are also available as placeholders. See *Customer satisfaction rating placeholders*.

The unoffered value is used here because we only want to send the survey for tickets that have not already been rated.

The automation actions send the survey request email to the requester.

The {{satisfaction.rating_section}} placeholder contains the rating question and answer links. You can modify the surrounding message as needed. And as always, a canceling action is used to complete the automation; ticket satisfaction is set to *offered to requester*.

This automation can be modified to exclude tickets using many different criterion. For example, you might not want surveys sent for tickets assigned to a certain group or from a certain organization or for tickets containing certain tags.

Customer satisfaction rating placeholders

Aside from the placeholder mentioned above, {{satisfaction.rating_section}}, the customer satisfaction rating feature adds four other related placeholders to the help desk. All of these placeholders can be used in various ways and are described in the following table.

Table 18: Customer satisfaction rating placeholders

Placeholder	Description
{{satisfaction.rating_section}}	A formatted block of text prompting the user to rate satisfaction.
{{satisfaction.current_rating}}	The text value of the current satisfaction rating, either Good or Bad.

Placeholder	Description
{{satisfaction.positive_rating_url}}	A URL to rate the support positively.
{{satisfaction.negative_rating_url}}	A URL to rate the support negatively.
{{satisfaction.rating_url}}	A URL to rate the support (positive or negative are not pre-selected).
{{satisfaction.current_comment}}	The comment that the user added when rating the ticket.

Creating customer satisfaction reports

Both the standard reporting in Zendesk and GoodData for Zendesk reporting (available to Zendesk Plus+ customers) provide support for ticket satisfaction rating.

In the standard reporting, you can use the Ticket Satisfaction condition to create a report that displays statistics for tickets rated good and bad, as in this example:

You can of course also add groups, organizations, specific assignees, and so on.

GoodData for Zendesk customer satisfaction reports

GoodData for Zendesk provides a project template containing the following four customer satisfaction rating reports:

Customer satisfaction summary

A summary of satisfied vs unsatisfied ratings, overall satisfaction score and response rate, for the trailing week and month.

Support satisfaction vs response rate

View a daily trend of customer satisfaction vs customer response rate for solved tickets over the last month.

Top performers and laggards

Show highest and lowest performing agents by satisfaction score. By default, agents will only show in this report once they have been rated on 30 or more tickets in the last 60 days; this is configurable.

Customer satisfaction watchlist

Immediately surface customers with the lowest satisfaction score. Use this information to pinpoint important customers who may need extra support attention.

Setting up customer satisfaction reports in GoodData

GoodData provides instructions for creating a new project template that includes the customer satisfaction rating reports. Or, you can update your existing template to add the reports without also losing the customizations you've made to the GoodData reporting dashboard.

Analyzing forum activity

To more closely monitor how active your knowledge base and forums are, Zendesk provides a Stats dashboard. For each category and forum, you see activity data for the last 30 days. This includes the number of new topics created, how many users have viewed the topics, and the total number of votes, subscriptions, and comments.

Forum analytics is available in the Plus+ and Enterprise versions of Zendesk. The statistics are only visible to admins and agents who have permission to moderate the forums.
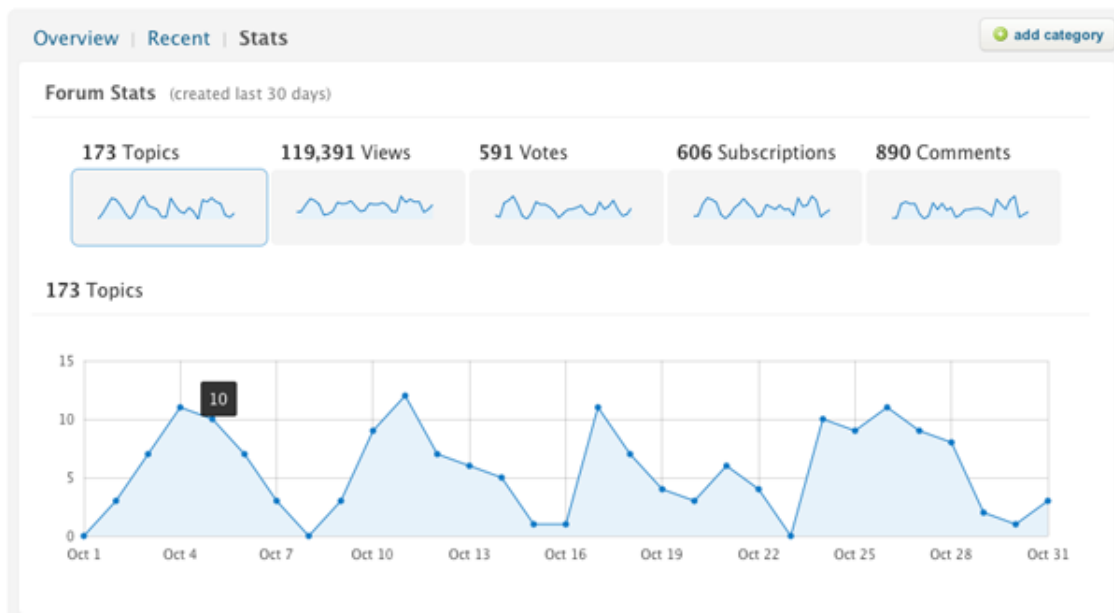
By clicking one of the five data sets, you see a more detailed graph that contains a node for each day. Hover your mouse over the nodes to see the total number for that day.

The detailed graph also compares each data set to its average from previous months, as shown in the detailed graph below.
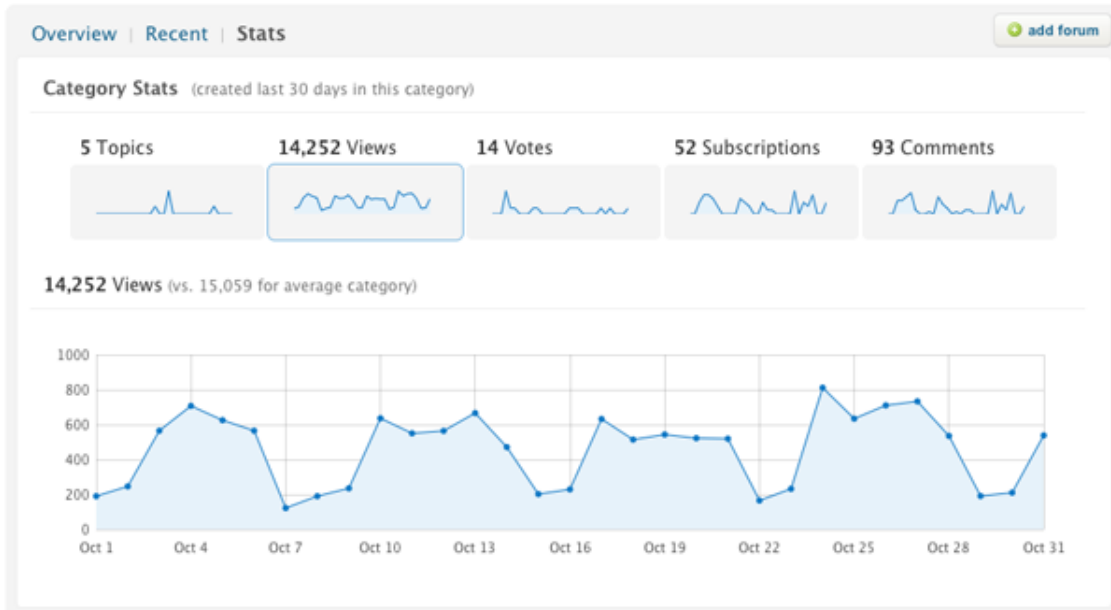
Activity statistics are provided at each level in the forums: the overview level, at the category level, and for forums and topics. When you select one of the statistic types (for example, Views, as shown above) the top 25 topics are displayed below the Stats dashboard. They are sorted from highest to lowest (for example, most views to least views). The number of views is shown next to the topic title. In the example below the total number of views for the most viewed topic is 1521.
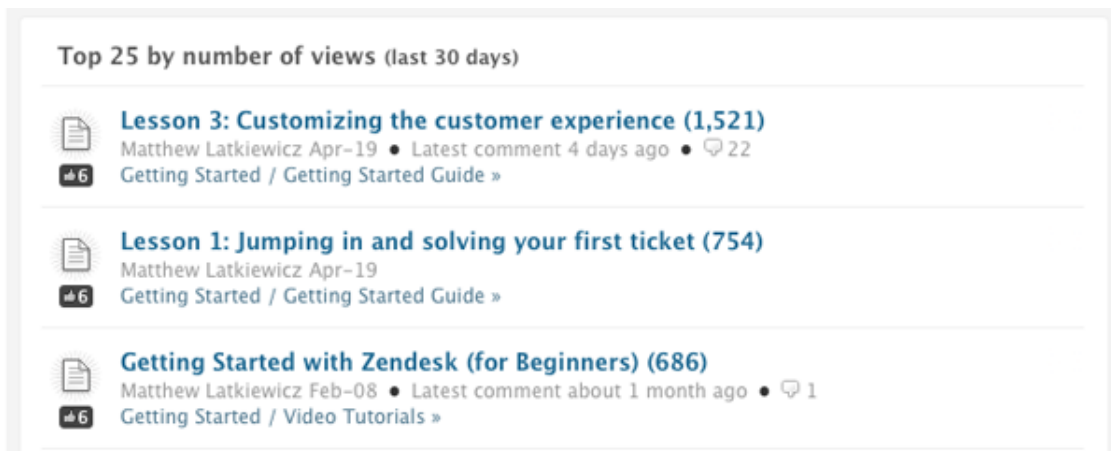
Each of the topic lists is a persistent URL (for example: https://support.zendesk.com/categories/12132-getting-started#stats/entry_view) that can be bookmarked.

Forum analytics is enabled by default. If you don't want to use this feature, select **Settings > Channels > Web portal > Forum analytics** to disable it.

How statistics are calculated

The statistics are calculated based on the following:

- All activity for the last 30 days
- Access by both end-users and agents
- Each page request is counted as a view

When you move a topic to a different forum or a forum to a different category, the item's statistics are not added to the container's statistics. This is because statistics are only calculated for a container (a forum or category) if the activity occurred within the container. 30 days after you've moved the item, the container will accurately reflect the activity that occurred within those 30 days. The moved item, however, retains all its accumulated activity statistics. Likewise, the container that the item was moved from retains the item's statistics until 30 days after it was moved.

The subscriptions statistic is based on the total number of subscriptions to the topics within a forum. Subscriptions to the forum itself are not calculated.

It can take up to 24 hours before new activity data is displayed in the Stats dashboard.

How you can use forum activity statistics

Forum analytics gives you insight into how your knowledge base and forums are being used. You can then take action based on this information. Here are several examples of how you can use forum analytics to monitor your knowledge base and provide better support to your customers.

Monitor unanswered questions and create tickets

If you create a forum for asking and answering questions, you can track what questions have not been answered within 24 hours (for example) and either respond to them or assign the question to an agent by clicking **Escalate to ticket**. Monitoring this type of forum can also make you aware of the types of information that should be addressed in your knowledge base.

Update popular topics

At the overview, category, and forum levels, you can easily see what the most popular topics are by number of views. Select **Views** from the Stats dashboard and you'll see the list of top 25 topics by views over the last 30 days. You'll see the total number of views per item and also the topic author and the creation date. You'll want to ensure that your most popular topics are closely monitored and are always up to date.

Measure your knowledge base content effectiveness

Using forum analytics, you can measure how effective your content is in creating deflection by answering questions before they are asked. For example, a high number of votes can indicate that a topic is useful. A topic with many comments can indicate that the content is confusing or incomplete and requires your customers to ask follow-on questions.

Chapter

7

Configuring and using your email channel

- *Getting started with email in Zendesk*
- *Forwarding email from other email providers*
- *Using an external email domain*
- *Changing the default email reply address*
- *Setting up email pass through*
- *Enabling personalized email replies*
- *Using the whitelist and blacklist to control access to your help desk*
- *Managing suspended tickets*
- *Customizing your email templates*
- *Setting up an email-only help desk*

Getting started with email in Zendesk

Your Zendesk account supports an unlimited number of email addresses within your Zendesk domain. In other words, you can support as many email address variations as you need. For example, you might use support email addresses such as these:

> support@myaccount.zendesk.com
> help@myaccount.zendesk.com
> sales@myaccount.zendesk.com
> billing@myaccount.zendesk.com

Email you receive into your help desk becomes tickets.

Note: Some email may be redirected to the suspended tickets queue. This includes email that is flagged as spam and under certain conditions legitimate support requests that do not meet the acceptance criteria. For more information, see *Managing suspended tickets* .

By using different email addresses for different situations, you can manage and track your tickets based on the email address at which the support request was received. For example, if your end-users send email to sales@myaccount.zendesk.com, you can create a trigger to route tickets received at that address directly to the Sales team. You can also track, via views and reports, tickets received at those different addresses.

You don't need to explicitly declare any of these email variations in your Zendesk account settings. By default, any email domain username is supported. Just publish the email addresses you want to support and your end-users can send support requests to those addresses.

Note: This also means that variations are also supported. For example, if an end-user misspelled your support email address (for example, biling@myaccount.zendesk.com) the email is also accepted and a ticket created.

The email channel has many options for controlling how your end-users interact with your help desk using email. You can also use email to organize your users and customize your workflow.

Forward email to Zendesk from external email addresses

Accepting support requests via external email addresses is also supported. If you already have, or want to support, external email addresses, you can forward email received at those addresses to equivalent addresses in your Zendesk domain. For example, you might set up email addresses for your company's domain that map to your Zendesk domain.

> support@mycompany.com   >   support@myaccount.zendesk.com
> help@mycompany.com   >   help@myaccount.zendesk.com
> sales@mycompany.com   >   sales@myaccount.zendesk.com
> billing@mycompany.com   >   billing@myaccount.zendesk.com

You can also forward all of your external support email addresses to just one of your Zendesk account domain email addresses, if you don't want or need to manage incoming email using the separate addresses.

When first setting up your email channel, you may want to begin by determining how many addresses you need and then setting up email forwarding from your external email account. Email forwarding is described in *Forwarding email from other email providers*.

Use your own email domain for incoming and outgoing email

In addition to receiving support requests at your external email addresses and then forwarding that email to your Zendesk account, you can also configure your email channel to process all outgoing email as if it were coming from your own email domain, rather than your Zendesk account domain.

Exactly how this looks to your end users depends on how you set up your reply address. These options are described in the following section.

Using your own domain requires a little more set up on your part and much of it is done outside of Zendesk and may require help from your domain administrator. Setting this up is a multi-step process and is described in *Using an external email domain*.

Change the email addresses used in outgoing email notifications

Zendesk provides you with a number of options for changing the email address that is used in email notifications to your end-users.

Email addresses consist of three parts: the friendly name, the username, and the domain.

The friendly name in this example is the name of your help desk (**Settings > Account > Branding > Help desk name**). The username, the word before the @ character, comes from the default reply email address (**Channels > Email > Default reply email address**). The domain consists of a combination of subdomains: your account and Zendesk.

If you make no changes to your outgoing email configuration, the features of which are described below, this is the address used in all email replies to the support requests you receive.

In addition to the three parts of an email address, there are also three types of email addresses that are used in the exchange of email messages between end-users and your help desk.

Email address	Description
Sent To	This is the email address that supports requests are sent to. The Sent To email address can be any of your supported email help desk email addresses (for example, support@myaccount.zendesk.com).
Reply From	This is the email address that end-users see as the From address in the replies they receive from your help desk. There are a number of options for changing what this looks like (described below).
	The default reply address is My help desk name <support@myaccount.zendesk.com>.
Reply To	This is the email address that end-users see when they reply back to the email they received from your help desk. Replies back from the end-user include the ticket number, as in this example:
	My help desk name <support+id#@myaccount.zendesk.com>
	Note: The ticket ID is handled differently when using your own email domain. See *About the Reply To addresses*.

When you enable the Zendesk outgoing email configuration options, they affect the Reply From and Reply To email addresses in slightly different ways for accounts using the default help desk domain (myaccount.zendesk.com) and those using an external domain (mycompany.com).

Default reply email address

The default reply email address is used as the Reply From address in all outgoing email unless you enable one of the other options described below. See *Default reply email address*.

Reply From address	Reply To address
My help desk name <support@myaccount.zendesk.com>	My help desk name <support+id#@myaccount.zendesk.com>
My help desk name <support@mycompany.com>	My help desk name <support@mycompany.com>

You can change the default reply username to any of the other email addresses that you support.

Personalized email replies

Enabling personalized email replies adds the agent's name to the Reply From address, overriding the default reply email address. See *Personalized email replies*.

Reply From address	Reply To address
Claire Grenier <notifications-support@myaccount.zendesk.com>	My help desk name <support+id#@myaccount.zendesk.com>
Claire Grenier <notifications-support@mycompany.com>	My help desk name <support@mycompany.com>

Agent display names

In the Plus+ and Enterprise versions of Zendesk, agents can create display names that are used in all communications with end-users. When personalized email replies is enabled, the agent's display name overrides their real name. See *Agent display names*.

Reply From Address	Reply To address
Senhora Claire <notifications-support@myaccount.zendesk.com>	My help desk name <support+id#@myaccount.zendesk.com>
Senhora Claire <notifications-support@mycompany.com>	My help desk name <support@mycompany.com>

Email pass through addresses

Enabling email pass through addresses means that the same email address that was used as the Sent To address is also used as the Reply From address. This only works when forwarding email from external email addresses or using an external email domain for outgoing email. See *Email pass through addresses*.

Reply From address	Reply To address
help@mycompany.com	My help desk name <support@mycompany.com>

The email username does not pass through in the Reply To address. Instead, the default reply email address is used.

About the Reply To addresses

When your end-users reply back to an email notification, the base of the Reply To address is your default reply email address. However, replies back from the end-user must also include the ticket ID so that the incoming email can be matched to the ticket in your help desk. This is implemented in two different ways. When using the myaccount.zendesk.com domain, the ticket ID is included in the Reply To address, as in this example:

MondoCam Support <support+id1910@mondocam.zendesk.com>

The ticket ID is also added as a token in the email header. The only control you have over the Reply To address is to change the default reply email address. For example, if MondoCam used 'help' instead of 'support' as the username in the default reply address, the Reply To email address would look like this:

MondoCam Support <help+id1910@mondocam.zendesk.com>

If you're using an external domain for email, the ticket ID is added to the email header but is not included in the Reply To address. Also, as noted above, the default reply address is used.

MondoCam Support <support@mondocam.com>

The difference between these two implementations has to do with how email is processed when using an external domain.

Customize your email templates

All of your email communication is sent using a template that you can customize. The template is in both HTML and plain text. You can customize the template to match your branding. You can also make some minor modifications to the wording.
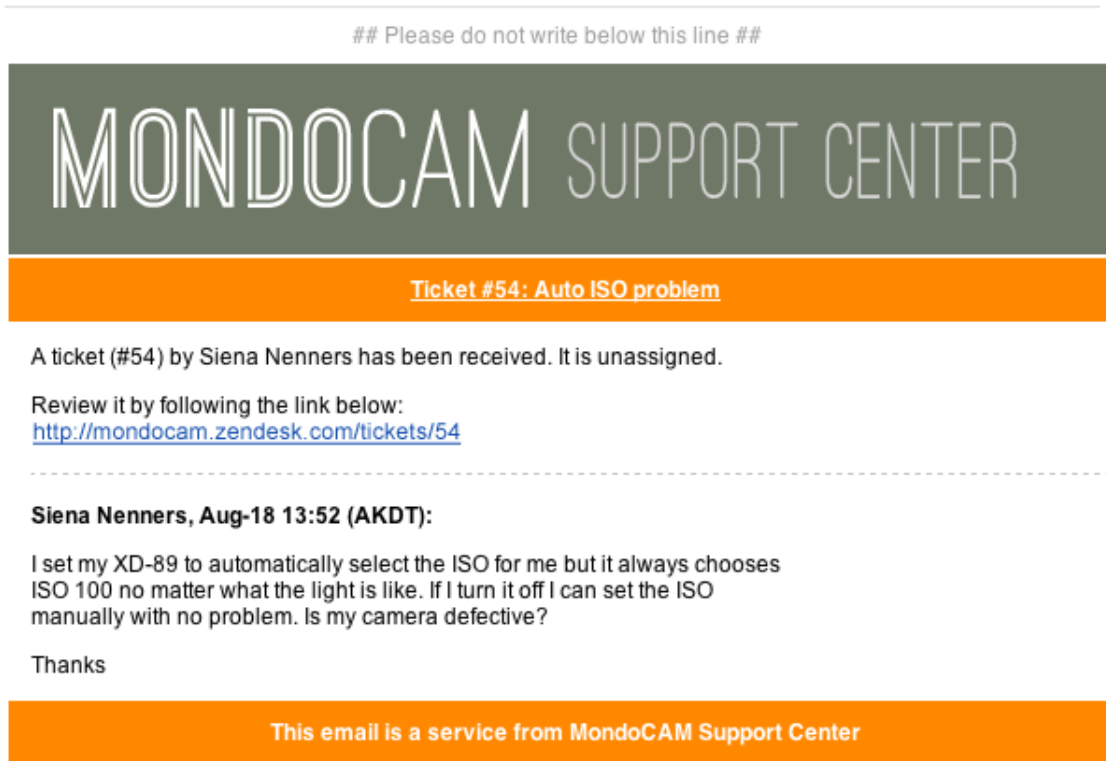
This example shows that a header graphic has been added to the HTML template and the colors have been changed.

Customizing your email templates is described in *Customizing your email templates*.

System generated registration and welcome email messages

If you require your end-users to register before submitting support requests, there are two system-generated emails that they receive: the user welcome message and the email verification message.

The text of the messages can be edited by an admin by selecting **Settings > End-users**. Both messages can be edited on this page.

The user welcome email message:

```
Please follow the link below to choose a password, and we will log you in right
 away.
```

The email verification email message:

```
We need to verify that you are the owner of this email address. Please follow the
 link below to verify.
```

If you run an open help desk and therefore don't require your end-users to register and log in, they will not receive either of these messages. See *Updating end-user settings to create an open help desk*.

Email messages generated by business rules

Any business rules you set up to notify users contain text that will be included in email notifications. Zendesk provides you with several notification triggers the generate email notifications when a new support request is received via the ticket channels you support.

The default notification triggers include:

- Notify requester of received request
- Notify all agents of received request
- Notify twitter requester of received request

Email notifications are usually generated at each stage in the workflow, such as updating the ticket, solving the ticket, and so on. Your help desk business rules will contain many email notifications.

Agent email settings

You have a number of options for customizing an agent's outgoing email. As mentioned in *Change the email addresses used in outgoing email notifications* above, you can configure your help desk to include the agent's real name or display name in outgoing email.

Each agent's signature can also be added to ticket comments and outgoing email notifications. This is the default setting (**Settings > Agents**). A placeholder is used to insert the signature that agents add to their own profiles. An agent's signature can include any text, such as their name, the name of their support group, contact information, and so on.

You can also create a signature template for your help desk if, you example, you want all agent signatures to include a standard wording and format for the company address. See the agent settings page **Settings > Agents** for more information.

Use email domains to control access to your help desk

You can control access to your help desk based on your end-users' email address using the whitelist and blacklist. You add email domains or specific email addresses in the whitelist to allow those users to submit email. Domains and email addresses added to the blacklist can be immediately routed into the suspended email queue or completely rejected, preventing tickets from being created.

For more information, see *Using the whitelist and blacklist to control access to your help desk*.

Use email to manage users

Users can be automatically added to an organization based on their email domain when they submit a request for the first time or otherwise register with the help desk. This is referred to as user mapping and an admin can set this up by editing an organization's settings.

For more information, see *Automatically adding users to organizations based on their email domain*.

Multiple email address support

Each user's account can contain multiple email address identities. One is the primary address and is used for all email notifications. Other email addresses are supported so that support requests that a user sends from one of their other emails accounts (either inadvertently or on purpose) are matched to the same user account.

If an alternate email address is not included in the user's profile, a new and separate user account is created. Should this happen, you can merge the new account into the old account. For more information, see *Merging a user's duplicate account*.

Suspended tickets and spam email

Zendesk uses a spam filter to prevent your help desk from getting cluttered with bogus tickets. Spam email is caught and may be held in the suspended tickets queue or completely rejected (this depends on a percentage of probability that the email is spam). The suspended tickets queue is a system-generated view that appears in your list of views when email has been added to it.

However, there are other conditions under which legitimate tickets can be sent to the suspended ticket queue. See *Managing suspended tickets* for more details.

Email can also be suspended or rejected by using the whitelist and blacklist (*Using the whitelist and blacklist to control access to your help desk*) and you can manually delete a ticket and suspend the ticket requester if it makes is past the spam filter.

Forwarding email from other email providers

You can receive support requests at external addresses and then forward them to equivalent email addresses in your Zendesk account.

support@mycompany.com	>	support@myaccount.zendesk.com
help@mycompany.com	>	help@myaccount.zendesk.com
sales@mycompany.com	>	sales@myaccount.zendesk.com
billing@mycompany.com	>	billing@myaccount.zendesk.com

You can also forward all of your external support email addresses to just one of your Zendesk account domain email addresses, if you don't want or need to manage incoming email using the separate addresses.

support@mycompany.com	>	support@myaccount.zendesk.com
help@mycompany.com	>	support@myaccount.zendesk.com
sales@mycompany.com	>	support@myaccount.zendesk.com
billing@mycompany.com	>	support@myaccount.zendesk.com

You configure email forwarding in your email account, not in Zendesk. Exactly how this is done depends on the email provider you're using. Here are several popular examples:

- *Microsoft Outlook 2007: Automatically forward my messages to another e-mail account*
- *Google Gmail*
- *Yahoo Mail*

Note: You might also want to check out a Zendesk forum post called *Forwarding emails from Microsoft Exchange, Fastmail, or Gmail to Zendesk*, which contains some examples of setting up email forwarding and lots of good advice from Zendesk users.

A number of email providers also allow you to create email forwarding rules so that you can select the incoming mail that should be forwarded to your Zendesk account.

Check your suspended view for forwarding verification email

Using email forwarding in Google Gmail as an example, a verification email is sent to support@myaccount.zendesk.com when you set up the forwarding. You'll need to check your ticket queue to locate the verification message and then click the link to verify that you want to forward email to this address. If you can't locate the verification message ticket, check the suspended tickets view. See *Managing suspended tickets Managing suspended tickets*.

Using an external email domain

To change your email address to an email domain other than myaccount.zendesk.com, you need to make changes to your domain DNS settings. All but one of the steps involved are done outside of Zendesk and require knowledge of and access to edit your web site's domain settings.

There are three steps required to make this change:

1. To receive support requests at an email address other than the Zendesk default email address (for example, help@mycompany.com), you need to forward mail received at that address to your Zendesk account (support@myaccount.zendesk.com).
2. 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.
3. Update the default reply email address in **Settings > Channels > Email** to your external support address (help@mycompany.com).
4. If you also want to use *personalized email replies*, create an alias for the reply address.

Forward your incoming support mail to Zendesk

The first step is to forward the email that is received at your external email addresses to equivalent addresses in your Zendesk account. See *Forwarding email from other email providers*.

Allow Zendesk to send outgoing mail on behalf of your email domain

The only way that you can send outgoing email from your Zendesk account and make it appear that it originated from your own email address (help@mycompany.com), is to create or edit (if you already have one set up) an SPF (Sender Policy Framework) record to include a reference to Zendesk. The SPF record declares what SMTP servers other than your own are allowed to send mail as if it originated from your domain, which prevents spammers from sending email appearing to come from your domain.

To create or edit an SPF record, you need to edit your domain's DNS settings. The steps in this part of the process are going to vary depending on the hosting service you use.

To begin, it'll be helpful to understand more about SPF records and what you need to include in yours. We recommend using either of the following SPF records.

Option 1:

```
v=spf1 include:support.zendesk.com ~all
```

Option 2:

```
v=spf1 include:support.zendesk.com ?all
```

This is an example of a new SPF record. If you already have an SPF record, you add support.zendesk.com to it.

Note: Some Zendesk users have reported that they also needed to include smtp.zendesk.com to their SPF record. This may be due to a configuration issue with the external domain. You include it as in the following example:

```
v=spf1 include:support.zendesk.com include:smtp.zendesk.com ~all
```

The only difference between the two is `~all` and `?all`. These differences will be explained after describing the other elements contained in the record statements.

The first element in the record is `v=spf1`, which sets the SPF version to 1. The `include` directive is then used to declare that `support.zendesk.com` has permission to send outgoing mail from your Zendesk account as if it came from your domain.

Finally, the `all` directive determines how mail received from a domain not included in the SPF record is handled. To reject all mail not coming from a domain listed in the SPF record, you would use `-all`. However, Zendesk and many other customers who have already set this up, recommend using either `~all` or `?all`. Here's what each means:

- `~all` - This is considered a 'soft fail' in that the mail did not originate from a domain listed in the SPF record. However, it's not immediately rejected and may be evaluated further to determine if it will be accepted. In other words, the mail might be rejected as spam.
- `?all` - This is a declaration that you have no policy about mail received from domains not listed in the SPF record. Using this minimizes the chances of the mail being rejected as spam.

Which of these you choose is up to you and your domain administrator. Some Zendesk users have noted that using the more lenient setting (`?all`) helps to offset poorly configured mail servers that might otherwise over zealously reject the mail.

Note: If you're curious, you can read more about SPF records at *www.openspf.org*.

Creating an SPF record

This is a step that you'd ideally have your domain administrator take care of. If that's not possible, or if you're the de facto domain administrator, here are some examples of how add an SPF record to your domain.
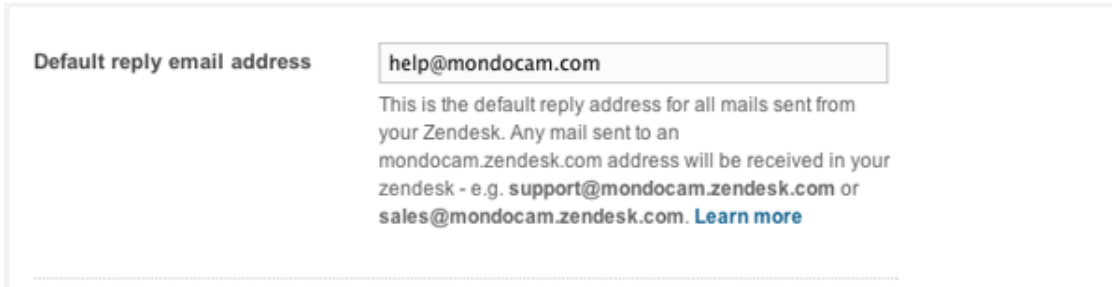
SPF records are a single line of text and follow the format described above. If you have already set up an SPF record for another purpose, you can simply add a reference to the Zendesk support domain to it. For example, users of both Google Apps and Zendesk have created SPF records that look like this:

```
v=spf1 include:_spf.google.com include:support.zendesk.com ?all
```

How you add an SPF record to your DNS configuration depends on how and by who your domain is being hosted. As an example, here are the instructions provided by GoDaddy.com: *Managing DNS for your domain names*.

Update the default reply email address in Zendesk

The final step is to select **Settings > Channels > Email** and set the default reply email address to your external email address.

Default reply email address

help@mondocam.com

This is the default reply address for all mails sent from your Zendesk. Any mail sent to an mondocam.zendesk.com address will be received in your zendesk - e.g. **support@mondocam.zendesk.com** or **sales@mondocam.zendesk.com**. **Learn more**

Personalized email replies with external default email reply addresses

When you change your default reply email address to an external domain and also want to enable personalized email replies (see *Enabling personalized email replies*), you need to do an additional step to get it working properly.

With personalized email replies enabled, the reply address is Agent Name <notifications-support@myaccount.zendesk.com>. Since you've set up your account to use an external domain, you need an equivalent email address for your external domain (notifications-support@mydomain.com) to enable this feature.

To do this, you need to create an email alias (sometimes referred to as a nickname or forwarder) that forwards email from notifications-support@mydomain.com to support@myaccount.zendesk.com.

This is typically an easy task. Here's an example of setting up an email alias in Google Gmail: *Google: Add an email alias*.

Changing the default reply email address

When you create a Zendesk account, by default, your default reply email address is support@myaccount.zendesk.com (email received at this address become tickets). This address is used as the Reply From address in all email notifications unless you do one of the following:

- *Enable personalized email replies*
- *Use agent display names*
- *Enable email pass through*

The part of the address that you can change with this option is the email username, which is the word preceding the @ symbol. The friendly name is the title of your help desk (**Settings > Account > Branding > Help desk name**).

Your default reply email address is used as the reply address no matter which of your supported email addresses is used.

Sent To	Reply From
support@myaccount.zendesk.com	My help desk name <support@myaccount.zendesk.com>
help@myaccount.zendesk.com	My help desk name <support@myaccount.zendesk.com>
sales@myaccount.zendesk.com	My help desk name <support@myaccount.zendesk.com>
billing@myaccount.zendesk.com	My help desk name <support@myaccount.zendesk.com>

If you forward email from external email accounts (see *Forwarding email from other email providers*), the result is the same.

Sent To	Reply From
support@mycompany.com	My help desk name <support@myaccount.zendesk.com>
help@mycompany.com	My help desk name <support@myaccount.zendesk.com>
sales@mycompany.com	My help desk name <support@myaccount.zendesk.com>
billing@mycompany.com	My help desk name <support@myaccount.zendesk.com>

If you've set up to use an external email domain for outgoing email (see *Using an external email domain*), you also set an external default reply address.

Sent To	Reply From
support@mycompany.com	My help desk name <support@mycompany.com>

Sent To	Reply From
help@mycompany.com	My help desk name <support@mycompany.com>
sales@mycompany.com	My help desk name <support@mycompany.com>
billing@mycompany.com	My help desk name <support@mycompany.com>

Note: If you enable email pass through addresses (see *Setting up email pass through*), the Reply From address is the same address that the email was sent to. This overrides the default reply email address, *personalized email replies*, and *agent display names*.

You can change your default reply address to any other email address in your Zendesk account. You can also change your default reply address to an external email address. The first option is described here and the second is described in *Using an external email domain*.

To change **support**@myaccount.zendesk.com to something like **help**@myaccount.zendesk.com or **sales**@myaccount.zendesk.com, all you need to do is select **Settings > Channels > Email** and change the username.

You can change this when you set up your account or any time thereafter.

The email username you enter here is also used in the email Reply To address. For more information, see *About the Reply To addresses*.

Setting up email pass through

When forwarding email from external email addresses (see *Forwarding email from other email providers*) or using an external email domain for outgoing email (see *Using an external email domain*), the Reply From address (the address that end-users see in email responses to their support requests) can be configured to use the same email address that was used to submit the request. This is referred to as **email pass through addresses** and enabling it overrides all other settings that affect the email Reply From address (*default reply email address*, *personalized email replies*, and *agent display names*).

This option doesn't provide the personalization of including the agent's name or display name, but it does provide continuity in that a support request sent to your billing department's email address, for example, is replied to using the same email address. What is passed through and returned is the original email username and domain.

Sent To	Reply From
support@mycompany.com	support@mycompany.com
help@mycompany.com	help@mycompany.com
sales@mycompany.com	sales@mycompany.com
billing@mycompany.com	billing@mycompany.com

Note: Email pass through does not work with your Zendesk email addresses (for example, support@myaccount.zendesk.com).

When an end-user replies back to the email, the Reply To address is the default email address. The email address does not pass through.

Reply From	Reply To
help@mycompany.com	My help desk name <support@mycompany.com>
billing@mycompany.com	My help desk name <support@mycompany.com>

To enable email pass through

1. Select **Settings > Channels > Email**.
2. Select **Email pass through address > Enable**.

For this to work properly, Zendesk needs to know where the email originated. This information is contained in the email header. At least one of the following elements must be present in the header:

- X-Forwarded-For
- X-Envelope-To
- X-Orig-To
- Resent-From

Some email clients and providers do not include this information in the header, which means that email pass through will not work. If you have control over how email is handled (for example, when

forwarding email through your own domain or in a corporate setting), you can ensure that pass through will work by adding this information to the email header.

Enabling personalized email replies

When configuring your email channel, you have the option of adding the agent's name to the Reply From address in all email replies to the end-user. In other words, you're changing the email friendly name from the help desk name to the agent name. This is referred to as **personalized email replies**.

This example shows how email notifications look to end-users if you have not enabled personalized email replies.

> From: MondoCAM Support Center <support@mondocam.zendesk.com>
> Subject: **Request received: Flash won't fire**
> Date: August 16, 2011 11:03:45 AM PDT
> To: Argus Waldren <awaldren@example.com>

The help desk name and *default reply email address* is used. The agent's name does not appear in the Reply From address, but it is included in comments that the agent adds to the ticket.

With personalized email replies enabled, end-users see the agent's name in the Reply From address. This overrides the default reply email address.

> From: Max McCal <notifications-support@mondocam.zendesk.com>
> Subject: **[MondoCAM Support Center] Re: Flash won't fire (ticket #341)**
> Date: August 16, 2011 12:10:23 PM PDT
> To: Argus Waldren <awaldren@example.com>

Personalized email replies works with all of your email addresses.

Sent To	Reply From
support@myaccount.zendesk.com	Claire Grenier <notifications-support@myaccount.zendesk.com>
help@myaccount.zendesk.com	Ben Gunther <notifications-support@myaccount.zendesk.com>
sales@myaccount.zendesk.com	Donna Rohrs <notifications-support@myaccount.zendesk.com>
billing@myaccount.zendesk.com	Mike Weeden <notifications-support@myaccount.zendesk.com>

When forwarding email from external email addresses (see *Forwarding email from other email providers*), you get the same result.

Sent To	Reply From
support@mycompany.com	Claire Grenier <notifications-support@myaccount.zendesk.com>
help@mycompany.com	Ben Gunther <notifications-support@myaccount.zendesk.com>

Sent To	Reply From
sales@mycompany.com	Donna Rohrs <notifications-support@myaccount.zendesk.com>
billing@mycompany.com	Mike Weeden <notifications-support@myaccount.zendesk.com>

If you've set up to use an external email domain for outgoing email (see *Using an external email domain*), you also set up a notifications-support email for personalized email replies that uses your external email domain.

Sent To	Reply From
support@mycompany.com	Claire Grenier <notifications-support@mycompany.com>
help@mycompany.com	Ben Gunther <notifications-support@mycompany.com>
sales@mycompany.com	Donna Rohrs <notifications-support@mycompany.com>
billing@mycompany.com	Mike Weeden <notifications-support@mycompany.com>

Note: If you enable email pass through addresses (see *Setting up email pass through*), the Reply From address is the same address that the email was sent to. This overrides personalized email replies and *agent display names*.

When an end-user replies back to the email, the Reply To address is the default email address.

Reply From	Reply To
support@myaccount.zendesk.com	My help desk name <support+id#@myaccount.zendesk.com>
help@mycompany.com	My help desk name <support@mycompany.com>
sales@myaccount.zendesk.com	My help desk name <support+id#@myaccount.zendesk.com>
billing@mycompany.com	My help desk name <support@mycompany.com>

The differences between the Reply To address when using the Zendesk domain versus using an external domain, are described in *About the Reply To addresses*.

To enable personalized email replies

1. Select **Settings > Channels > Email**.
2. Then select the **Personalized Email Replies > Enabled** option.

A personalized reply is used when agents add public comments to the ticket (whether or not they are the assigned agent).

Using the whitelist and blacklist to control access to your help desk

You can control access to your help desk based on your end-users' email addresses; either accepting or rejecting their attempts to register as a user in your help desk or to submit support requests. You do this using the whitelist and blacklist. The whitelist can be used to allow access to everyone or just specific email addresses and domains. The blacklist, used with the whitelist, prevents access to either all end-users who have not been added to the whitelist or specific email addresses and domains.

Email received from blacklisted domains and email addresses can be immediately routed into the suspended email queue or completely rejected, preventing tickets from being created.

The whitelist and blacklist are end-user settings (**Settings > End-users**).

☑ **Ask users to register**

Upon submitting a ticket, new users receive a welcome email **requiring** them to register for the ticket to appear in your help desk.

Whitelist

> mondocamcorp.com

Always accept emails from these domains and/or email addresses. Enter multiple values separated by space (e.g. somedomain.com joe@otherdomain.com). **Read more**.

Blacklist

> *

Always suspend emails from these domains and/or email addresses. Enter multiple values separated by space (e.g. somedomain.com joe@otherdomain.com). Put in an asterisk (*) to blacklist everything except the domains added to the whitelist. **Read more**.

In this example, the whitelist contains the MondoCam corporate domain. All email originating from this domain (including subdomains) are accepted. The blacklist is then used to declare that all other email is not allowed. This is done by adding an asterisk (*), which is a wildcard that blacklists (suspends) everything. All email not received from the mondocamcorp.com domain is sent to the suspended tickets queue.

You can however also reject email, meaning that it will not be added to the suspended tickets queue. There will be no record of the email in your help desk.

If you run an 'open' help desk, meaning that you are public and accept support requests from everyone, you can use the blacklist to filter out specific unwelcome email domains and addresses such as spam.

Email that has been suspended as a result of having been blacklisted is added to the suspended ticket queue and flagged as blacklisted.

Whitelist and blacklist usage examples

The whitelist and blacklist are used together to create rules for accepting, suspending, and rejecting email. Aside from the asterisk, which suspends email, there are two other keywords that you can use to build rules. The suspend keyword explicitly declares that a specific domain or email address will be sent to the suspended tickets queue. The reject keyword completely rejects the email, which means that it is not added to the suspended tickets queue. All three of these keywords can be used together to define your rules.

Approve a domain, suspend all others

This example whitelists one domain and suspends all others.

```
whitelist: mondocamcorp.com
blacklist: *
```

You can also add more than one domain or email address to the whitelist. Separate each with a space.

```
whitelist: mondocamcorp.com mondocam.com mondostore.com
blacklist: *
```

Approve a domain, but suspend specific email addresses within it

In this example, an entire domain is approved in the whitelist, all other email is rejected by using an asterisk in the blacklist, and then a specific email address within the approved domain is suspended using the suspend keyword.

```
whitelist: gmail.com
blacklist: * suspend:randomspammer@gmail.com
```

Using this method, you can suspend specific email addresses from a domain that you have approved in the whitelist.

Approve a domain, but reject specific email addresses and domains within it

Similar to the previous example, a domain is approved in the whitelist and then exceptions to that approval are made in the blacklist. Instead of suspending a specific email address, it is instead rejected.

```
whitelist: gmail.com
blacklist: * reject:randomspammer@gmail.com
```

This example also shows that you can add multiple email addresses and domains to the blacklist.

Approve all, but reject specific email addresses and domains

You can also leave the whitelist empty, meaning that all email is accepted, and then make exceptions for specific email addresses and domains.

```
whitelist:
blacklist: * reject:randomspammer@gmail.com reject:megaspam.com
```

Marking tickets as spam and suspending users

If email somehow makes it through the spam filter and your blacklist and tickets and new user accounts are created, you have two options for purging your help desk of both.

One of the ticket update options is **Mark as spam and suspend user**, which deletes the ticket and suspends the ticket requester. You can also select a user's account and suspend their access. For more information, see *Suspending a user*.

Managing suspended tickets

Based on a number of factors, described below, some of the email coming into your help desk may be suspended or rejected. Email messages that are suspended are added to the suspended tickets queue.

In most cases, email you receive become new tickets or updates to existing tickets (if the email is a follow up to an existing ticket). Under the following conditions, however, email will be suspended or rejected:

- The email is detected as spam. If the email is rated as having a 99% chance of being spam, it is rejected and not accepted into your help desk. If there's less than a 99% probability, the email is suspended and you can then decide for yourself.
- The email does not meet the acceptance criteria described below in *Reasons why tickets get suspended*. A common example of this is email from unverified users; until they verify their email address, so that their account is considered valid, their email is suspended.
- The email address or domain has been blocked based on your whitelist and blacklist settings. See *Using the whitelist and blacklist to control access to your help desk*.

When tickets are suspended you can recover them and create tickets or delete them.

Reasons why tickets get suspended

The following table lists the reasons that incoming email can become suspended tickets. These are the reasons displayed in the Suspended Tickets view.

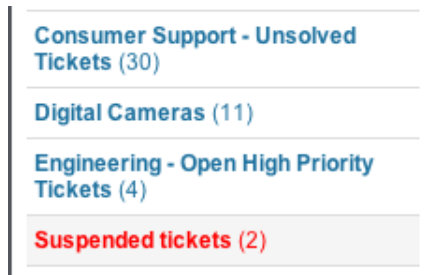| Cause of suspension	Description
Automatic email processing failed	Although rare, you might see this if a system-wide email processing error occurred.
Automated response mail	This is used when the email header indicates that the message is an auto-generated email response.
Automated response mail, delivery failed	This indicates that an outgoing email notification was not delivered to its recipient. The delivery failure email response is suspended so that a ticket is not created.
Automated response mail, out of office	Out of office and vacation auto-generated response emails are suspended.
Detected as mail loop	If you receive a large number of emails from a single sender in a short period of time, those emails are suspended and the sender's address is blacklisted for one hour. This also happens to tickets that are sent from an address equal to your default Reply To address.
Detected as spam	The email has been flagged as spam with a probability lower than 99%. If the probability is 99%, the email is rejected.
Detected email as being from a system user	Email generated by a mail server (for example, messages sent from addresses beginning with mail-daemon@ and

Cause of suspension	Description
	postmaster@) are suspended because it is assumed that they are not intended to be support requests.
Email for 'noreply" address	The email address is a "no reply" email address, meaning that it is not intended to receive email.
End user only allowed to update their own tickets	This indicates that an email response (ticket update) was received from a user (email address) that is different from the original submitter's email address. This might happen if the submitter forwarded the email to a different email account and then attempted to reply back to the help desk. Multiple email addresses per user are supported but they must be added to the user's profile.
Permission denied due to unauthenticated email update	This indicates that the email header doesn't contain the ticket ID token. This can happen if an email client strips out email header information.
Permission denied for unknown email submitter	When you require your help desk users to register and create an account, email received from unregistered (unknown) users is suspended.
Sender domain not on whitelist	When your account is configured to only allow emails from a given set of domains (using the whitelist), this indicates that the sender's email address or domain is not within that set.
Submitted by unverified user	This indicates that the user is known in your help desk but has not yet verified their email address.
Unknown user tried to update existing ticket	An unknown user has attempted to update an existing ticket. This can happen if an email is forwarded and then replied to (using the Reply To email address) from an unknown user account. A user's account can include multiple email addresses but they must be added to their user profile.
User must sign up to submit email, user notified	This is used when an account requires end-users to register and therefore verify their email address before submitting tickets. Once their email address/user account is verified, they can submit tickets.

Troubleshooting spam email and suspended tickets

Zendesk uses spam detection software to rate, suspend, and sometimes reject incoming email. If you find that you're still receiving more spam than you'd like, you can use the blacklist to suspend or reject specific email addresses and domains. If on the other hand email that you expect not to be suspended is, you can use the whitelist to explicitly approve email addresses and domains. See *Using the whitelist and blacklist to control access to your help desk*.
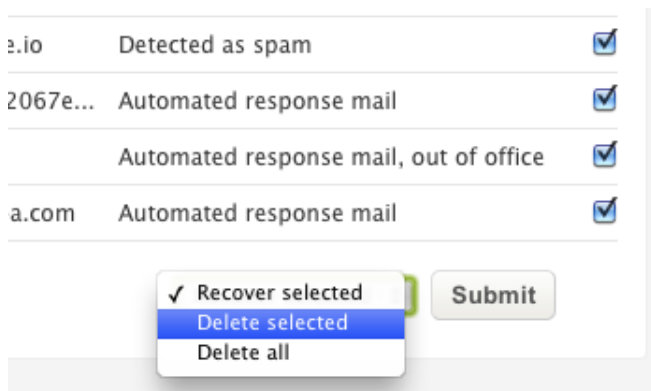
Viewing suspended tickets

Suspended tickets appear in a system-generated view. If you have no suspended tickets, you will not see a view. If you do, a Suspended Tickets view is added to your list of views, as shown here:

Consumer Support - Unsolved
Tickets (30)

Digital Cameras (11)

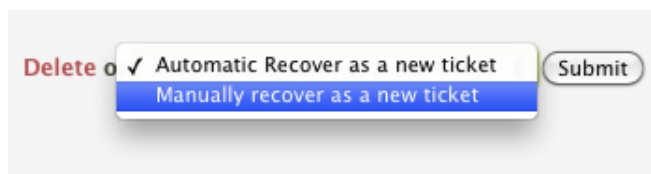Engineering - Open High Priority
Tickets (4)

Suspended tickets (2)

Selecting the view allows you to manage the suspended tickets. You can view detailed information
for each, including the reason for suspension, and then recover or delete them.

Deleting or recovering suspended tickets

Tickets that have been suspended can be manually unsuspended and placed back into your ticket
queue. You can unsuspend tickets in the Suspended Ticket view one at a time or in bulk. You can
also delete suspended tickets. Select **Views > Suspended tickets**.

e.io   Detected as spam   ☑

2067e...   Automated response mail   ☑

             Automated response mail, out of office   ☑

a.com   Automated response mail   ☑

✓ Recover selected   Submit
Delete selected
Delete all

When you select a single suspended ticket, you have the following delete and recover options:

Delete o ✓ Automatic Recover as a new ticket   Submit
         Manually recover as a new ticket

The automatic recover option immediately recovers the ticket. The manual recover option allows
you to edit the ticket properties first and then recover the ticket.

When you recover a suspended ticket for a new user (not a known user in your help desk account),
an unverified new user account is created.

Note: All unrecovered suspended tickets are deleted after two weeks.

Setting up suspended ticket notifications

In addition to the Suspended Tickets view, you can set up a suspended tickets notification email that
is sent to specific email addresses.

Select **Settings > Tickets**. In the **Suspended Ticket Notifications** section you can select the frequency and enter the email addresses that you want the notifications to be sent to.
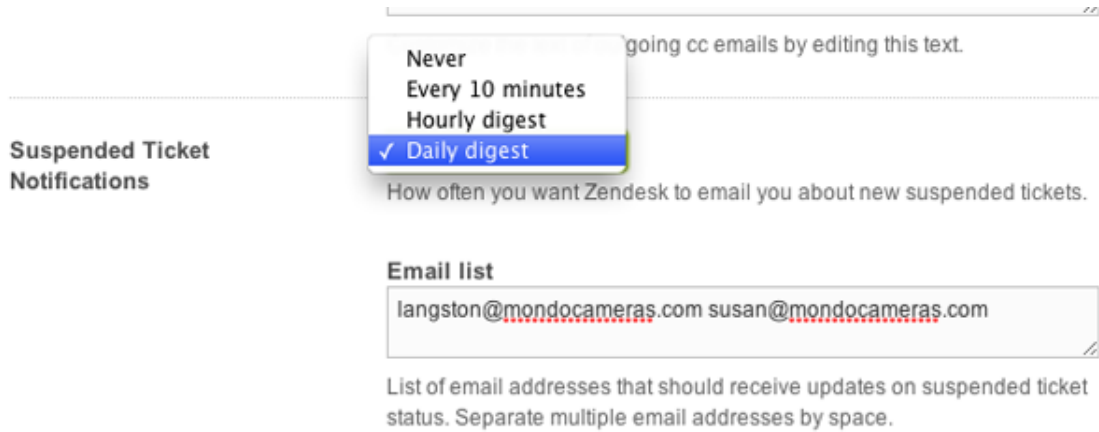
If you later want to cancel these notifications, select **Never**.

You'll only receive the notification email if there are tickets in the suspended tickets queue.

Customizing your email templates

All of the email notifications that are sent from your help desk are formatted for both HTML and plain text. Both formats are included in each email. Which version end-users see depends on the preference settings of their email clients. You can customize the HTML template to match your branding by making a few simple style changes. You can also edit the information that is contained in the text versions of your emails.

The HTML and text templates are used to format all the email that is sent from your help desk.

Note: If you're running an email only help desk, you should refer to *Setting up an email-only help desk*. That article describes how to remove links back to the help desk that would prompt your end-users to attempt to log in to the help desk.

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before

After

In addition changing the background color of the header and footer, this example also adds a company logo that links back to the help desk.

Editing the HTML template

Unlike the other customization examples in the CSS Cookbook, the HTML template is customized without adding a CSS widget. The email templates (HTML and text) are located in **Settings > Channels > Email**.

Here's the default HTML template code:

```
<html><body>
<div style="margin:0px auto;text-align:center;font-
size:12px;color:#A2A2A2;padding-bottom:6px">
  {{delimiter}}
</div>
<table cellspacing="0" cellpadding="0" width="100%">
<tr>
  <td>
    <table width="100%">
      <tr>
        <td style="font-size: 12px; font-weight: bold; color: #fff; line-height:
1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-align:
center;background: #98c332; padding:8px; margin:4px">
          <style>.zd_link {color:#FFF;}</style>{{header}}
        </td>
      </tr>
    </table>
  </td>
```

```
</tr>
<tr>
  <td style="text-align:center;padding-left:4px">
    <table width="100%">
      <tr>
        <td style="font-size: 12px; font-family: Arial;font-style:normal; font-
variant:normal;padding:8px;text-align:left">
          {{content}}
        </td>
      </tr>
    </table>
  </td>
</tr>
<tr>
  <td>
    <table width="100%">
      <tr>
        <td style="font-size: 12px; font-weight: bold; color: #fff; line-height:
1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-align:
center;background: #98c332; padding:8px">
          {{footer}}
        </td>
      </tr>
    </table>
  </td>
</tr>
</table>
</body></html>
```

The template consists of the email text delimiter, a header, the content area, and the footer. All of them are contained within a table. It also includes system placeholders that insert the delimiter, header, footer, and ticket content. The {{delimiter}} and {{content}} placeholders are required. You can remove the {{header}} and {{footer}} placeholders.

To make simple branding changes to this HTML, you only need to make minor changes.

Here's how to set the background color of the header and footer:

```
<td style="font-size: 12px; font-weight: bold; color: #fff; line-height:
1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-align:
center; background: #98c332; padding:8px; margin:4px">
        <style>.zd_link {color:#FFF;}</style>{{header}}
</td>

...

<td style="font-size: 12px; font-weight: bold; color: #fff; line-height:
1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-align:
center; background: #98c332; padding:8px">
        {{footer}}
</td>
```

The font color is set with this style declaration:

```
color: #fff;
```

The background color is set with this style declaration:

```
background: #98c332;
```

Change either of these to colors that match your branding.

Note: The hyperlink color in the HTML template cannot be customized.

Adding a logo

To add your company logo to the template, you can add another table row containing the HTML needed to reference the image and a hyperlink.

```
<tr>
    <td style="background:#6F7866;">
    <a href="http://YOURACCOUNT.zendesk.com"><img src="http://YOURWEBSITE.com/
logo.png"></a>
 </td>
</tr>
```

In this example, the background color of the table cell is also set. This is because the MondoCam logo we've used in the CSS Cookbook has a transparent background. Whether or not you set this depends on how you created your logo.

If you don't want to add the hyperlink, just omit the href, as in this example:

```
<tr>
    <td style="background:#6F7866;">
    <img src="http://YOURWEBSITE.com/logo.png"/>
 </td>
</tr>
```

Complete HTML template example

Here's the complete example of the HTML template example.

```
<html>
<body>
<div style="margin:0px auto;text-align:center;font-
size:12px;color:#A2A2A2;padding-bottom:6px">
  {{delimiter}}
</div>
<table cellspacing="0" cellpadding="0" width="100%">
<tr>
  <td>
    <table width="100%">
      <tr>
        <td style="background:#6F7866;">
      <a href="http://YOURACCOUNT.zendesk.com"><img src="http://YOURWEBSITE.com/
logo.png"></a>
  </td>
      </tr>
   <tr>
        <td style="font-size: 12px; font-weight: bold; color: #fff; a: green;
 line-height: 1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-
align: center; background: #FF8800; padding:8px; margin:4px">
          <style>.zd_link {color:#FFF;}</style>{{header}}
        </td>
      </tr>
    </table>
  </td>
</tr>
<tr>
  <td style="text-align:center;padding-left:4px">
    <table width="100%">
      <tr>
        <td style="font-size: 12px; font-family: Arial;font-style:normal; font-
variant:normal;padding:8px;text-align:left">
          {{content}}
        </td>
```

```
          </tr>
      </table>
    </td>
</tr>
<tr>
  <td>
    <table width="100%">
      <tr>
        <td style="font-size: 12px; font-weight: bold; color: #fff; line-height:
 1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-align:
 center; background: #FF8800; padding:8px">
          {{footer}}
        </td>
      </tr>
    </table>
  </td>
</tr>
</table>
</body></html>
```

Liquid markup and placeholders

Liquid markup does not work in the email templates, only in business rules that generate email notifications. You also cannot add any other placeholders to the template. You can remove the {{header}} and {{footer}} placeholders but {{delimiter}} and {{content}} are required.

If you want more control over the content of email notifications, you can use Liquid in business rules that generate email notifications. See *Using Liquid markup to customize comments and email notifications*.

More advanced customizations

You could of course do more to customize the HTML template to your liking. Keep in mind however that HTML in email can be difficult because of the way it's rendered in different Web browsers and email clients and because certain types of formatting will be interpreted as SPAM. In general, you should keep your customization as simple as possible and follow these guidelines:

- Do not use CSS 3 style declarations. Stick to CSS 1 or 2.
- Do not add more div sections.
- Keep your text formatting to a minimum. Lots of bold text can trigger SPAM filters.
- HTML 5 is not yet supported, so don't use it.
- Don't add lots of images (another trigger for SPAM filters) and downscale the images that you do use.
- Use the alt tag on all images. This displays a description of the image before users allow the images to be displayed in an email.
- If you know the width and height of the image, define it. This forces the email client to reserve the image space in the layout of the email before the images have been downloaded.
- Background images are not supported in all email clients, so don't rely on them for information or functional design.

Editing the text email template

The email template consists of two system placeholders that insert the ticket information and a footer.

```
{{content}}
```

```
{{footer}}
```

Here's what our example ticket looks like in plain text:

```
## Please do not write below this line ##

[MondoCam Support Center] Auto ISO problem

A ticket (#54) by Siena Nenners has been received. It is unassigned.

Review it by following the link below:
http://mondocam.zendesk.com/tickets/54

--------------------------------------------
Siena Nenners, Aug-18 13:52 (AKDT):

I set my XD-89 to automatically select the ISO for me but it always chooses
ISO 100 no matter what the light is like. If I turn it off I can set the ISO
manually with no problem. Is my camera defective?

Thanks


--------------------------------
This email is a service from MondoCam Support Center
```

The {{content}} placeholder contains the text delimiter, the ticket title, text that is generated from business rules (automations, macros, or triggers) and the ticket comments. You can easily remove the footer placeholder. If however you want to edit the text contained in the {{content}} placeholder to remove the link to the help desk, you need to edit your notification triggers and any other business rules that generate email notifications.

Editing notification triggers to remove the help desk links is described in *Removing help desk URLs from notification triggers*.

If you'd like to add more text to this template, you're free to do so. Simply add it to the template.

```
Thanks for contacting MondoCam Support!
```

```
{{content}}
```

```
{{footer}}
```

Editing the text in the mail delimiter and supporting other languages

The text in the mail delimiter is used to inform the email recipient that any text entered into a reply must be above a certain line in the email.

I figured it out. There's no problem. Please ignore this. Thx.

On Thu, Aug 18, 2011 at 2:27 PM, MondoCAM Support Center
<support@mondocam.zendesk.com> wrote:

Please do not write below this line

Ticket #53: Auto ISO problem

This ticket (#53) has been updated.

To review the status of the ticket and add updates, follow the link below:
http://mondocam.zendesk.com/tickets/53

Siena Nenners, Aug-18 13:27 (AKDT):

I set my XD-89 to automatically select the ISO for me but it always chooses
ISO 100 no matter what the light is like. If I turn it off I can set the ISO
manually with no problem. Is my camera defective?

Thanks

This email is a service from MondoCAM Support Center

When the recipient's reply is received in Zendesk, the delimiter is used to define old content from new and only the new content is added to the ticket as a comment. If there were no delimiter, each ticket comment would contain the entire content of the email.

The delimiter must be present in the template, but you can change the words in the text string. As shown in the example above, the text is "Please do not write below this line". If needed, you can change this to something else. The text must be between 20 to 65 characters.

The delimiter is located on the same settings page as the email template (**Settings > Channels > Email**).

If you support multiple languages in your help desk, you need to replace the delimiter text string with the {{txt.email.delimiter}} placeholder.

Mail delimiter

{{txt.email.delimiter}}

Between 20 and 65 characters.

The mail delimiter is used to inform the mail recipient that he must reply above a certain line in the email. This is to avoid replies to carry all ticket history back, and thus clutter the information flow in the ticket.

Enter {{txt.email.delimiter}} if you want to send a translated version of the delimiter in the language selected by the mail recipient.

When you use this placeholder, the text in the delimiter is drawn from the translations that are provided for the languages that are supported in Zendesk. Which language is shown in the email message is based on each user's language preference. This is a convenient way to support different language versions in your email template. However, it also means that you have no control over the

words in the translated versions of the delimiter. Although, the default text string and the translated versions should suffice.

Note: If your users don't have a language preference selected, as is the case with unverified users in an email-only help desk (see *Setting up an email-only help desk*), the text in the delimiter will be in your help desk's primary (default) language.

Setting up an email-only help desk

Many help desks prefer to not require their end-users to log in to the Web portal. They provide the same level of service, but their end-users don't have access to the Web portal to view or track their requests. Instead, all communication between agents and end-users occurs using channels such as email, and voice, and chat.

Regardless of the channel by which new requests are submitted, requests become tickets that agents manage in the help desk by using views, creating and applying macros, generating reports, and so on. All communication between agents and end-users is captured on those tickets and emails are sent back and forth between both parties. The only change for the end-user denied access to the help desk is that they track their requests in email.

Your end-users request support and interact with your help desk and agents (without logging in) by using the following channels:

- Sending email directly to your support email address (for example, support@*mycompany*.zendesk.com)
- Submitting a support request using the Zendesk dropbox
- Chatting with an agent
- Leaving a voicemail
- Sending a request using Twitter

All of these channels can be used to generate requests without requiring end-users to log in; however, one aspect of the Web portal experience that you probably don't want to deny your end-users is access to your knowledge base and participation in your community. You can achieve this without requiring them to log in by:

- Providing your end-users with the link to your knowledge base and forums (for example, http://*mycompany*.zendesk.com/forums)
- Using the Zendesk dropbox with knowledge base search enabled

The advantage of using the Zendesk dropbox is that your end-users are provided with a simple request form (that also displays your custom fields) coupled with a search of your knowledge base and, optionally, live chat with your support agents, as shown here:
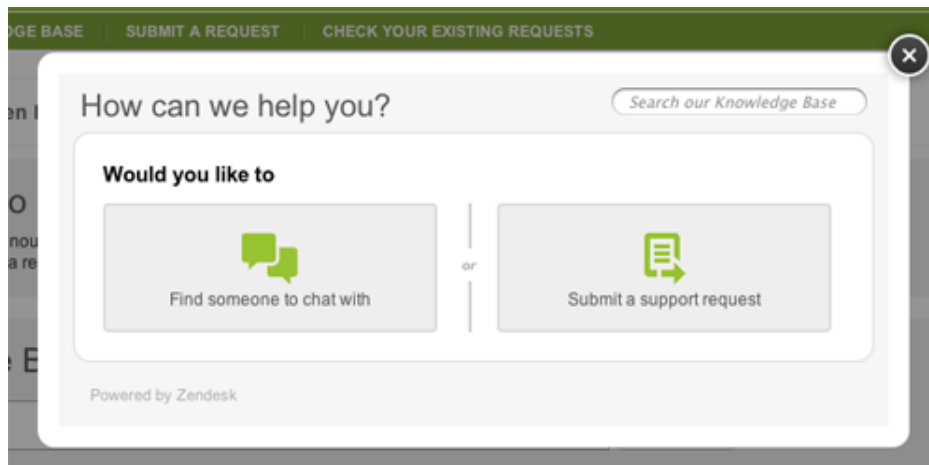
You can add the dropbox to your help desk or to any web page you choose.

If you choose to point your end-users directly to your forums, you'll need to make a few changes to the Web portal user interface to remove links to log in, sign up, get a password, and submit requests (see *Hiding end-user access links in the Web portal*).

Setting up your help desk to provide support without also requiring end-users to log in involves the following:

- Allowing anyone to submit requests and hiding the requirement to log in
- Modifying the email notification template to remove all URLs to the help desk
- Modifying triggers to remove all URLs to the help desk
- Adding a CSS and a JavaScript widget to hide links to register, log in, and submit requests

Updating end-user settings to create an open help desk

To allow requests without requiring end-users to log in to help desk, you need to modify account settings to create an open help desk. Only admins can make the following changes to the end-user settings.

To modify account settings to create an open help desk

1. Select **Settings > End-users**.
2. In the **Anyone can submit tickets** section, check the **Enabled** option.
3. Next, uncheck the option called **Ask users to register**.
4. Finally, in the **User welcome email** section, uncheck the **Also send welcome email when a new user is created by an agent or admin** option.
5. Click **Save Changes**.

When an unregistered end-user submits a request for the first time, they are added to the help desk as a new end-user. They receive the request confirmation email but not the verification request email. They remain unverified in the help desk.

Note: You might be wondering about the **Allow users to view and edit their basic profile data** and **Allow users to change their password** options. You can leave these enabled since your email-only end-users will never be able to log in to do either of these things. Both are still relevant to your admins and agents. You'll probably want to also allow your end-users to add attachements to their email requests. If you don't currently have this enabled, you can do so by selecting **Settings > Tickets > Attachments > Customers can attach files**. This can be set by an admin.

Modifying the email HTML template

Since you're not allowing end-users to log in to the Web portal, you'll want to remove all URL references to it in email notifications that are sent to end-users. Email notifications are formatted using an HTML template that you can easily modify. The header element within this template contains a link back to the help desk, so you'll want to remove it. Here's what the header looks like to the end-user:

Only admins can make changes to the email template.

To remove the header from the email HTML template

1. Select **Settings > Channels > Email > Edit**.
2. In the HTML email template section, locate and remove the line of HTML code that displays the header (shown in bold below).

```
<html><body>
<div style="margin:0px auto;text-align:center;font-
size:12px;color:#A2A2A2;padding-bottom:6px">
  {{delimiter}}
</div>
<table cellspacing="0" cellpadding="0" width="100%">
<tr>
  <td>
    <table width="100%">
      <tr>
        <td style="font-size: 12px; font-weight: bold; color: #fff; line-
height: 1.5em;font-family: Helvetica, Arial, sans-serif; width: 100%;text-
align: center;background: #98c332; padding:8px; margin:4px">
          <style>.zd_link {color:#FFF;}</style>{{header}}
        </td>
      </tr>
    </table>
  </td>
</tr>
...
```

3. Click **Save Changes**.

You can undo this change (should you need to in the future) by clicking **Revert to default**.

Removing help desk URLs from notification triggers

You'll also need to remove the URLs from all the default Zendesk triggers that send email
notifications to requesters. Here are the Zendesk triggers that need to modified:

- Notify requester of received request
- Notify requester of comment update
- Notify requester of solved request

You'll also need to modify any similar notification triggers (if any) that you created in your help
desk. Only admins can edit the triggers.

To remove URLs from email notification triggers

1. Select **Manage > Triggers and mail notifications**.
2. Edit the **Notify requester of received request** trigger by selecting **Edit**.
3. Remove the {{ticket.id}} and {{ticket.url}} placeholders from the text in the email body.
   For example, here are before and after versions of the email text in the **Notify requester of
   received request** trigger.

   Before:

   ```
   Your request (#{{ticket.id}}) has been received, and is being reviewed by
    our support staff.

   To review the status of the request and add additional comments, follow the
    link below:
   http://{{ticket.url}}

   {{ticket.comments_formatted}}
   ```

   After:

   ```
   Your request (#{{ticket.title}}) has been received, and is being reviewed by
    our support staff.

   We'll contact you as soon as we have an answer for you.

   {{ticket.comments_formatted}}
   ```
4. Click **Update Trigger**.
5. Repeat for the **Notify requester of comment update** and **Notify requester of solved
   request** triggers.

Note: The {{ticket.title}} placeholder does not contain a URL back to the help desk; it's just the
text of the request title.

Hiding end-user access links in the Web portal

If you're inviting your end-users to visit your knowledge base and forums, you'll want to hide the
links that allow them to log in, to sign up, to get a password, submit requests, and to vote on and add
comments to forum topics (both of which prompts users to log in).

To make these changes to the user interface, you add a CSS widget to your help desk. Widgets can
only be added by an admin.

To add the CSS widget

1. Select **Settings > Extensions > Widgets > Add Widget**.

2. Select the **Global CSS** widget.
3. Enter a widget title, for example: *Hide end-user access links*.
4. Set the widget's availability to **People who are not agents**.
5. Insert the following CSS code into the **Content** text box:

```
li.main.clazz.tab_new, li.main.clazz.tab_requests, #top-right,
 #voting_control, #footer, #comments_section {display: none;}

body.entries.entries-show .content.content_green {display:none;}

body.access.access-unauthenticated .content.content_green {display:none;}
```

6. Click **Submit**.

The CSS widget removes all the elements of the user interface that provide access for end-users to log in to the help desk.

Note: This also means that your agents, like your end-users, will not see a login link for the help desk. To access the login page, your agents need to use the following URL: *mycompany*.zendesk.com/access. This is the login page.

Chapter

8

Searching the help desk

- *Zendesk search reference*
- *Searching users, groups. and organizations*
- *Searching tickets*
- *Zendesk for Twitter: Advanced search operators*

Zendesk search reference

In addition to full text search, you can search the help desk data objects using common search operators combined with data property keywords and values to narrow your search results. This is a quick reference of the search tools available in the help desk as well as the types of data that be searched.

First, essential facts about searching the help desk:

How soon can new data be searched?

When you add new data to the help desk, it typically takes about 2 to 3 minutes before it's indexed and can be searched.

How do titles and tags affect search?

Both the ticket or forum article title and any tags added to either help to improve search results. The title is weighted more heavily than tags.

Are there limitations to wildcard searches?

You can only do wildcard searches when combined with property keywords (`subject:photo*`).

Who can search what?

Admins can search the entire help desk. Agents can search the help desk data they've been granted access to. End-users can do full text searches of the knowledge base.

AND / OR searches

To do an AND search, meaning that you want to return all the words in your search statement, you need to use the plus (+) operator (described below in Search operators).

Note: Doing an AND search for tags is different, however. If you want to search for two (or more) at the same time, you can use a search statement like this:

```
tags:"first_tag second_tag"
```

Searches for text strings that are not contained within double quotes are treated as an implicit OR search. For example, searching for the following phrase return results if most of the words are present.

```
Please upgrade my account
```

Since it's not a phrase search (contained within double quotes), the order of the words doesn't matter. Zendesk is currently configured to return results if 66% of the words in a search like the one above are present.

Note: When using search keywords for data properties, you can do an OR search by declaring multiple instances of the same keyword, as in this example:

```
tags:first_tag tags:second_tag
```

Search operators

The following search operators can be used to build your search statements.

Table 19: Search operators

Operator	Description
:	The colon indicates that the given field should equal the specified value. `status:open`
<	Less than. `status<closed`
>	Greater than. `priority>normal`
" "	Double quotes. This is referred to as a phrase search and returns the exact words in the exact order. `subject:"Please upgrade my account"`
-	Minus sign. This is used to exclude a word (or property value) from a search. For example, the following search statement excludes an agent from the search results: `status:pending upgrade -account`
+	You use the plus operator to indicate that you only want results for the word or words you're searching for (in other words, an AND search). For example, if you wanted to search for tickets from users that want to upgrade their account, you can use a search statement like this: `+upgrade +account` This search will only return results for tickets that contain both of those words. In other words, both are required.
*	The wildcard operator is useful when you want to search various forms of a word. For example, searching for `photo*` returns results that would include photography, photographer, photograph and any other words that began with 'photo'. However, because of the performance issues involved with doing wildcard searches, unqualified wildcard searches are not currently supported. In other words, you need to use a property keyword to make your search specific to the data you're trying to locate. `subject:photo*`

Searching for properties that have no data

Properties that contain no data can be searched for using `none` as the value of a keyword, as in this example:

```
assignee:none
```

This returns all unassigned tickets.

You can use the `none` keyword value to search any of the data object properties.

```
type:user organization:none
```

This returns the users who have not been added to an organization.

Using the type keyword

One of the tools you have available for narrowing your search results is the `type` keyword. It's used to explicitly declare that you want to search the following help desk data objects:

- ticket
- comment
- user
- organization
- group
- entry or topic (forums)

Using the `type` keyword means that you are explicitly searching on the object you specify. For example, you can search for all the users that belong to the Customers organization using this search statement:

```
type:user organiazation:customers
```

If you instead searched for `organization:customers` you'd get all the tickets that have requesters who belong to this organization. This is because by default searches that do not explicitly declare an object return results for tickets (and organization is a ticket property).

Using `type:user`, your search returns all user profiles for users that belong to the Customers organization. So, you're narrowing your search to the user object and excluding tickets.

Note: The quickest way to understand the difference between searching for ticket and user data is to select one of your users who has submitted tickets and then do both of these searches: `type:ticket "user name"` and `type:user "user name"`.

While organizations and groups are properties of the user object, they have their own properties that can be searched as well. The following query allows you search only for organization tags, excluding tags of the same name that may be used in other elements of the help desk such as tickets and forum topics.

```
type:organization tags:premium
```

Similar to that, suppose that you've used the same tag in tickets and forum topics. To search for the occurrence of your tag in forum topics only, you can use the following search statement.

```
my_tag type:topic
```

Searching by date

Date properties (such as created, updated, and solved) can be combined with search operators to return data from a specific date, on or previous to a certain date, and on or after a certain date. The date format for all the date properties is YYYY-MM-DD.

To search for data on or before a certain date, use the less than (<) operator:

```
type:organization created<2011-05-01
```

To search for data on or after a certain date, use the greater than (>) operator:

```
due_date>2010-01-10
```

To search for a specific date, use the equals (:) operator:

```
solved:2010-01-10
```

Searching within a date range

You can search within a date range, for example August 1st, 2011 through August 5th, 2011, using the following search statement:

```
created>2011-08-01 created<2011-08-05
```

Searchable ticket property keywords

Here's the list of ticket properties that can be searched. For more information about searching tickets, see *Searching tickets*.

Table 20: Searchable ticket properties

Keyword	Description
Ticket ID	There isn't a property keyword for the ticket ID. Instead, you simply search for the ticket by its ID number in the following format: `233`
created	The date the ticket was created. `created:2011-05-01`
updated	The date of the most recent ticket update. `updated>2011-05-15`
solved	The date the ticket was set to solved. `solved<2011-06-01`
due_date	The due date of tickets with type set to Task. `due_date:2011-06-01`

Keyword	Description
assignee	The assigned agent. `assignee:"Susan Warren"`
submitter	The ticket submitter. This may be different than the requester if the ticket was submitted by an agent on behalf of the requester. You can use the user's name, email address, or the 'me' keyword. See *Searching ticket user roles*. `submitter:me`
requester	The ticket requester. `requester:amy@mondocam.com`
subject	The text in the ticket's subject. `subject:"upgrade account"`
description	The text in all the ticket's comments. `description:defective`
status	New, Open, Pending, Solved, Closed. `status<closed`
ticket_type	Question, Incident, Problem, Task. `ticket_type:problem`
priority	Low, Normal, High, Urgent. `priority>low`
group	The assigned agent's group name. `group:"Level 2"`
organization	The name of the ticket requester's organization. `organization:customers`
tags	Tags that have been added to the ticket. `status:pending tags:premium`
via	The ticket's source, which can be any of the following: • mail (from an email message) • get_satisfaction, get_sat, "get satisfaction" (from Get Satisfaction) • dropbox (from the Zendesk Feedback Tab) • merge (from a ticket merge)

Keyword	Description
	• chat (from Chat) • twitter_dm, "twitter dm", "twitter direct" (from a Twitter direct message) • twitter_fav, twitter_favorite, "twitter favorite" (from a Twitter favorite) • twitter (from any Twitter method including direct message and favorite) • voicemail (from a voicemail message) • phone_call_inbound (from an inbound phone call) • phone (from voicemail or an inbound call) • sms, text, "text message" (from a text message) • logmein, logmein_rescue, "logmein rescue" (from LogMeIn)
	`via:phone`
commenter	People who have added comments to tickets. `commenter:"Mike"` You can search by a user's ID, a partial name, full name, and using an email address.
cc	People who have been CC'd on tickets. `cc:amanda@mondocam.com` You can search by a user's ID, a partial name, full name, and using an email address.

You can also search custom fields. See *Searching custom fields*.

Searching for tickets with a user's telephone number

To locate a user's tickets based on their phone number, you can use a search statement like this:

`requester:+14154187506 status:new`

This works with all of the ticket user roles: `submitter`, `requester`, and `assignee`.

Searchable user property keywords

Here's the list of user properties that can be searched. For more information about searching users, see *Searching for users, groups, and organizations*.

To search for user data, you need to use the `type` keyword. See *Using the type keyword*.

Table 21: User property keywords

Keyword	Description
name	The user's partial or full name. `type:user name:"alex anderson"`
email	The user's email address.

Keyword	Description
	`type:user email:alex@mondocam.com`
	You can search for all users in an email domain. See *Searching for users by email domain*.
`group`	The user's group name. This only applies to admin and agent users.
	`type:user group:"Level 2"`
`organization`	The user's organization name.
	`type:user organization:mondocam`
`created`	The date the user was added to the help desk.
	`type:user created<2011-05-01`
`notes`	All text in the notes field in the user's profile.
	`type:user notes:"manager"`
`details`	All text in the details field in the user's profile.
	`type:user details:"madison, wi"`
`external_id`	The user's external ID, if used.
	`type:user external_id:0098884412`
`phone`	The user's phone number. You must search for the number exactly as it was originally entered into the user's account.
	`type:user phone:555-111-2222`
`tags`	Tags that have been added to the user's profile.
	`type:user tags:premium tags:wholesale`
	For more information about tagging users and organizations, see *Adding tags to users and organizations*.

Searchable organization property keywords

Here's the list of organization properties that can be searched. For more information, see *Searching for users, groups, and organizations*.

To search for organization data, you need to use the `type` keyword. See Using the type keyword.

Table 22: Organization property keywords

Keyword	Description
`name`	The user's partial or full name.

Keyword	Description
	`type:organization name:mondocam`
created	The date the organization was added to the help desk.
	`type:organization created<2011-05-01`
notes	All text in the notes field in the user's profile.
	`type:organization notes:EMEA`
details	All text in the details field in the user's profile. type:user details:information
	`type:organization details:london`
tags	Tags that have been added to the organization.
	`type:organization tags:premium`
	For more information about tagging users and organizations, see *Adding tags to users and organizations*.

Searchable group property keywords

Here's the list of group properties that can be searched. For more information, see *Searching for users, groups, and organizations*.

To search for group data, you need to use the `type` keyword. See *Using the type keyword*.

Table 23: Group property keywords

Keyword	Description
name	The group's name.
	`type:group name:"level 2"`
created	The date the group was added to the help desk.
	`type:group created<2011-05-01`

Searching users, groups, and organizations

Data in the user, group, and organization objects can be searched. Searching these objects returns user profiles and group and organization summary pages; each of which also lists any associated tickets.

You can search users, organizations, and groups by using the search tool that is displayed when you select **Manage > People**.

When you search from this page the results are restricted to this people data.

If you search using the global search tool, you need to also use the `type` keyword if you want to restrict results to specific types of data. If you don't, your search results will include matches from the entire help desk.

The user data properties that can be searched are described in the tables below. All of the searchable data in the help desk (including ticket data) is described in *Zendesk search reference*.

The user and type keywords

To search for a user's profile data, you have the following two options.

Using the `user` keyword:

```
user:amy
```

Or, using the `type:user` keyword:

```
type:user amy
```

What's the difference between the two? The keyword `user` when not combined with `type` is just a shortcut for finding users by ID, name, and email address. The `user` keyword, like the ticket user role keywords (assignee, requester, submitter), accepts the ID, name, and email address as valid user identifiers.

```
user:52789480
user:amy
user:"amy moore"
user:amy@mondocam.com
```

If you want to search for additional user data, such as the user's phone number, the organization they belong to, and so on, you need to use `type:user`.

```
type:user tags:beta_user organization:customers
```

This example also illustrates the usefulness of `type` keyword. With it you can search for user data that is shared by more than one user. You can search for users that are in the same organization or group or any of the other searchable user data. For more information about the `type` keyword, see *Using the type keyword*.

The `type` keyword is also used to search the group and organization data objects.

```
type:group name:"level 2"
type:organization name:customers
```

Searching users

The user data object contains all of the user properties that you can set in the user profile. Not all of the user profile data is searchable; those properties that are searchable are described in the following table.

Note: You can't currently search for users by their role.

Table 24: User property keywords

Keyword	Description
name	The user's partial or full name. `type:user name:"alex anderson"`
email	The user's email address. `type:user email:alex@mondocam.com` You can search for all users in an email domain. See *Searching for users by email domain*.
group	The user's group name. This only applies to admin and agent users. `type:user group:"Level 2"`
organization	The user's organization name. `type:user organization:mondocam`

Keyword	Description
created	The date the user was added to the help desk. `type:user created<2011-05-01`
notes	All text in the notes field in the user's profile. `type:user notes:"manager"`
details	All text in the details field in the user's profile. `type:user details:"madison, wi"`
external_id	The user's external ID, if used. `type:user external_id:0098884412`
phone	The user's phone number. You must search for the number exactly as it was originally entered into the user's account. `type:user phone:555-111-2222`
tags	Tags that have been added to the user's profile. `type:user tags:premium tags:wholesale` For more information about tagging users and organizations, see *Adding tags to users and organizations*.

Searching for users by email domain

All users belonging to the same email domain can be returned with this search statement:

`type:user mondocam.com`

To search for more than one email domain at a time, you just add more email domains to the search:

`type:user mondocam.com zendesk.com`

Searching groups

Here are the group properties that can be searched.

Table 25: Group property keywords

Keyword	Description
name	The group's name. `type:group name:"level 2"`
created	The date the group was added to the help desk. `type:group created<2011-05-01`

Searching organizations

Here are the organization properties that can be searched.

Table 26: Organization property keywords

Keyword	Description
name	The user's partial or full name. `type:organization name:mondocam`
created	The date the organization was added to the help desk. `type:organization created<2011-05-01`
notes	All text in the notes field in the user's profile. `type:organization notes:EMEA`
details	All text in the details field in the user's profile. type:user details:information `type:organization details:london`
tags	Tags that have been added to the organization. `type:organization tags:premium` For more information about tagging users and organizations, see *Adding tags to users and organizations*.

Searching tickets

Full text searches return results from the entire help desk. To search exclusively for ticket data, you can use ticket property keywords.

In the example above, `status` is the keyword and `open` is the value. This search returns all the tickets with status set to open. This of course directly maps to the ticket fields and their values.

You can combine these keyword search statements to narrow your results even further.

```
status:open group:"Level 2"
```

This returns all the open tickets that are assigned to the Level 2 support group.

Note: For a quick reference to all help desk data that can be searched, see *Zendesk search reference*.

The ticket property keywords and their values that you can use in your searches are described in the following table. Not all of the ticket data is searchable. Admins and agents can search for tickets using these keywords.

Table 27: Searchable ticket properties

Keyword	Description
Ticket ID	There isn't a property keyword for the ticket ID. Instead, you simply search for the ticket by its ID number in the following format: `233`
created	The date the ticket was created. `created:2011-05-01`
updated	The date of the most recent ticket update. `updated>2011-05-15`
solved	The date the ticket was set to solved. `solved<2011-06-01`
due_date	The due date of tickets with type set to Task. `due_date:2011-06-01`
assignee	The assigned agent. `assignee:"Susan Warren"`

Keyword	Description
submitter	The ticket submitter. This may be different than the requester if the ticket was submitted by an agent on behalf of the requester. You can use the user's name, email address, or the 'me' keyword. See *Searching ticket user roles*. `submitter:me`
requester	The ticket requester. `requester:amy@mondocam.com`
subject	The text in the ticket's subject. `subject:"upgrade account"`
description	The text in all the ticket's comments. `description:defective`
status	New, Open, Pending, Solved, Closed. `status<closed`
ticket_type	Question, Incident, Problem, Task. `ticket_type:problem`
priority	Low, Normal, High, Urgent. `priority>low`
group	The assigned agent's group name. `group:"Level 2"`
organization	The name of the ticket requester's organization. `organization:customers`
tags	Tags that have been added to the ticket. `status:pending tags:premium`
via	The ticket's source, which can be any of the following: • mail (from an email message) • get_satisfaction, get_sat, "get satisfaction" (from Get Satisfaction) • dropbox (from the Zendesk Feedback Tab) • merge (from a ticket merge) • chat (from Chat) • twitter_dm, "twitter dm", "twitter direct" (from a Twitter direct message) • twitter_fav, twitter_favorite, "twitter favorite" (from a Twitter favorite)

Keyword	Description
	• twitter (from any Twitter method including direct message and favorite)
	• voicemail (from a voicemail message)
	• phone_call_inbound (from an inbound phone call)
	• phone (from voicemail or an inbound call)
	• sms, text, "text message" (from a text message)
	• logmein, logmein_rescue, "logmein rescue" (from LogMeIn)
	`via:phone`
`commenter`	People who have added comments to tickets.
	`commenter:"Mike"`
	You can search by a user's ID, a partial name, full name, and using an email address.
`cc`	People who have been CC'd on tickets.
	`cc:amanda@mondocam.com`
	You can search by a user's ID, a partial name, full name, and using an email address.

All of the ticket property keywords can be used in search statements alone, in combination with other ticket property keywords, or with the `type` keyword (see Using the type keyword).

Searching ticket user roles

Users have various roles on tickets (requester, assignee, etc). These user roles can be searched by the user's ID, their name (partial or full), or their email address, as in these examples:

```
requester:52789480
submitter:amy
assignee:"amy moore"
requester:amy@mondocam.com
```

Notice that none of these searches required the ID, or name, or email to be explicitly declared. Each of these keywords accepts all of these user identifiers.

Searching for yourself

The `me` keyword value allows you to search user properties in tickets where the value is your own user account (as the currently logged in user).

```
assignee:me
```

This works for all the user role properties in tickets:

- `requester:me`
- `submitter:me`
- `assignee:me`

For information about searching for user profile data, see *Searching users*.

Searching custom fields

To search for custom fields, you use the tags that you assigned to the custom field. For example, if you created a drop-down list, you can search for the tags assigned to each list box item.

To search for specific drop-down list selections, you use the `tags` keyword.

```
tags:product_question
```

This applies to the custom field formats that be assigned tags: the drop-down list and the checkbox. The checkbox custom field can include a tag to indicate that the user has clicked the checkbox.

All of the other custom fields (text, multi-line text, numeric, decimal, regular expression) can be searched by the text or number values submitted by ticket requesters. For example, if you added a numeric custom field to the support request form to collect demographic information such as age, you can search for the numbers that the requesters entered in the form (`type:ticket "18"`).

Ordering and sorting ticket search results

Search results can be ordered and sorted using the `order_by` and `sort` keywords.

You need to use both of the keywords together in a search statement, as in this example:

```
status:new order_by:updated_at sort:asc
```

Here are the valid sorting and ordering keyword and value pairs that you can use:
- `sort:asc`
- `sort:desc`
- `order_by:priority`
- `order_by:status`
- `order_by:ticket_type`

- `order_by:updated_at`
- `order_by:created_at`

All of the `order_by` and `sort` keyword/values pairs can be used when searching ticket data.

Chapter

9

Customizing and extending your help desk

Using Liquid markup to customize comments and email notifications

If you're familiar with placeholders in Zendesk, then you already know something about Liquid markup. It's the templating language we use to enable them. Placeholders are used throughout the help desk (automations, macros, targets, triggers, and widgets) as containers for dynamically generated ticket and user data. What you may not know about Liquid markup is that you can also use it to customize how this data is selected and displayed as output. This is because Liquid also allows you to create simple programming logic such as case statements, if statements, for loops, and so on.

By writing simple control statements directly in the comment/description action in macros and the email user action in automations and triggers, you can accomplish in one automation, macro, or trigger what you used to have to do in multiple automations, macros, and triggers. You can also customize how comment text is presented.

A brief introduction to Liquid markup

You can find the Liquid documentation at *Liquid for Designers*. All of the elements of the language are described in detail. Here, however, is a brief introduction to how it works.

Liquid is a templating language for rendering email and HTML. In Zendesk, Liquid is the mechanism that enables the automated placement of data in comments and email notifications using placeholders.

There are two types of markup in Liquid:

- Output, which is text output contained in double curly brackets.
- Tags, which contain the programming logic that determines how the data is expressed with placeholders.

If you simply equate *output* with *placeholder*, you're about half way to understanding what Liquid is and how it's used in Zendesk. What you may not know about Liquid output however is that in addition to expressing ticket and user data, there are also methods available to manipulate text strings and arrays. In Liquid, these methods are referred to as *filters*. Using a filter you can transform text to uppercase characters, for example. But that's one of the simplest examples of what filters can be used for. See the Liquid documentation for more information.

The other half of understanding of how Liquid can be used in Zendesk comes from knowing what tags are and how they are used. Tags provide the programming logic that you can use to select and present data.

Using Liquid tags you can create:

- if else statements
- case statements
- for loops
- cycles
- variable assignments

As an example, based on ticket properties you can create different responses in your business rules. This example shows how you can modify the **Notify requester of received request** trigger (or any other trigger that serves the same purpose) to return a response based on your business hours.

```
{% if ticket.in_business_hours == 'true' %}

Hello {{ticket.requester.first_name}}

Your request (#{{ticket.id}}) has been received and is being reviewed by our
 support staff.

To review the status of the request and add additional comments, follow the link
 below:
http://{{ticket.url}}

{{ticket.comments_formatted}}

{% else %}

Hello {{ticket.requester.first_name}}

Your request (#{{ticket.id}}) has been received and will be reviewed by our
 support staff during regular business hours (Monday - Friday, 8am - 6pm PST).

To review the status of the request and add additional comments, follow the link
 below:
http://{{ticket.url}}

{{ticket.comments_formatted}}

{% endif %}
```

Using a simple if...else statement, the first response is sent if the request is received during business hours and the other is sent if it is not. The if statement tests the ticket.in_business_hours property and responds accordingly. The ticket property is in the same format that you're familiar with when it's used as a placeholder, although not contained within double curly brackets for the simple reason that it's not being used as output here but rather as part of the logic determining what will be included in the comment when it's sent to the requester as an email notification.

For several other examples of how these simple statements can be used in Zendesk, see *Supporting multiple languages in automations, macros, and triggers* and *Customizing the formatting and placement of text in comments and email notifications* below.

These are just several examples of what you can do with these simple but powerful Liquid tags.

Using Liquid markup in Zendesk

Here are several more examples of how Liquid markup is commonly used in business rules to customize comments and email notifications.

For the complete list of Zendesk data objects that can be used in your Liquid code, see *Zendesk data object (placeholders) reference*.

Note: You may find it convenient to test your Liquid markup in a test macro since you can see the results immediately by applying the macro to a ticket.

Using Liquid markup to support multiple languages in automations, macros, and triggers

Many help desks support end-users who speak languages other than English and there are a number of ways to manage this in Zendesk. In this example, a case statement is used to determine what response is sent to the end-user based on their language setting. The email body of the **Notify requester of received request** trigger contains the following Liquid markup:

```
{% case ticket.requester.language %}

{% when 'Italiano' %}

Ciao {{ticket.requester.first_name}}

La tua richiesta (#{{ticket.id}}) è stata ricevuta, è stato esaminato dal nostro
 staff di assistenza.

Per esaminare lo stato della richiesta e aggiungere ulteriori commenti, segui il
 link qui sotto:
http://{{ticket.url}}

{{ticket.comments_formatted}}

{% else %}

{% when 'Danish' %}

Hej {{ticket.requester.first_name}}

Din anmodning (# {{ticket.id}}) er blevet modtaget og bliver gennemgået af vores
 supportmedarbejdere.

At gennemgå status for anmodningen og tilføje yderligere kommentarer, skal du
 følge nedenstående link:
http:// {{ticket.url}}

{{ticket.comments_formatted}}

{% else %}

Hello {{ticket.requester.first_name}}

Your request (#{{ticket.id}}) has been received, and is being reviewed by our
 support staff.

To review the status of the request and add additional comments, follow the link
 below:
http://{{ticket.url}}

{{ticket.comments_formatted}}

{% endcase %}
```

The language preference is set in the user's profile. Language support is defined by an admin (**Settings > Account > Localization > Languages**) and you use the names (the exact text string) as displayed in the list of languages on that page.

Note: This example just shows the notify trigger. You'd also want to do the same thing for the update and solved triggers and any other business rules that generate comments and email notifications to the end-user.

In this example, we could have also explicitly declared the English text like the others ({% when 'English' %}). However, if the default language of the help desk is English it's not necessary. The English text will be displayed to all users who have not otherwise chosen a language setting.

As you can imagine, you can use something like this for any number of reasons, not just to support multiple languages. For example, maybe you want custom responses for users in different organizations for some reason. If so, you use ticket.organization.name in a case statement like this.

Customizing the formatting and placement of text in comments and email notifications

By default, many of the Zendesk business rules use the {{ticket.comments_formatted}} placeholder to include comments into email notifications. If you want more control over how the comments are presented to requesters, you can access more details about comments and their attachments using Liquid markup.

A comment is an element within a ticket and there are a number of placeholders available that you can use to include comments in email notifications. For example, you can include all comments, public comments, the last comment, etc (see *Comment data*).

If you want more control over how comments are displayed in email notifications, you can use Liquid markup and a for loop, as in this example:

```
{% for comment in ticket.comments %}

   Comment:
   {{comment.created_at}}
   {{comment.author.name}}
   {{comment.value}}

   Attachment:
   {% for attachment in comment.attachments %}
   {{attachment.filename}}
   {{attachment.url}}

   {% endfor %}

{% endfor %}
```

This returns the items in both arrays (ticket.comments and comment. attachments). In other words, the properties for every comment and attachment contained in the ticket.

If you want to only return the last comment, you can use the limit and offset attributes as in the following example:

```
{% for comment in ticket.comments limit:1 offset:0 %}
```

You can do a lot with arrays in for loops. Refer to the Liquid documentation (*Liquid for Designers*) for more details.

Zendesk data object (placeholders) reference

Zendesk placeholders are containers for dynamically generated ticket and user data. The format is a data reference contained within double curly brackets. Since you can also access ticket and user data when defining programming logic, it may be helpful to think beyond placeholders and think instead of data objects and their properties that can be used for either purpose.

There are two primary data objects in Zendesk: Ticket and User. Each has its own set of properties; the User object, for example, contains user properties such as name and email. In addition to these two data objects, there are associated data objects. For tickets, there are the Comment and Satisfaction Rating objects. For users, there is the Organization object.

User data

In the context of updating a ticket, there are a number of different types of users. These include the following:

- ticket.requester, who is the person who requested the ticket
- ticket.assignee, who is the agent assigned to the ticket
- ticket.submitter, who is either the user who submitted the request or the agent that opened the ticket on behalf of the requester
- current_user, who is the user currently updating the ticket (an end-user or agent)

This means that most of the user data listed in the following table can be returned for each type of user (for example, {{ticket.submitter.name}}, {{current_user.name}}, and so on).

Table 28: User object data

Properties/placeholders	Description
user.name	The user's full name.
user.first_name	The user's first name.
user.last_name	The user's last name.
user.email	The user's email address.
user.language	The user's language preference.
user.phone	The user's telephone number.
user.external_id	The user's external ID (if one exists). Used by help desks that have enabled remote authentication.
user.details	The user's details.
user.notes	The user's notes.
user.time_zone	The user's time zone.
user.role	The user's role (end-user or agent). Admin users return as agent.
user.extended_role	When using Zendesk Enterprise agent roles, this returns the name of the agent's Enterprise role. These are the predefined roles: • Advisor

Properties/placeholders	Description
	• Light Agent • Staff • Team Leader • Legacy Agent • Administrator If you've created custom agent roles, those role names are returned. If you're not an Enterprise account, using this placeholder returns 'Agent' for all agent users. End-users are 'End-user'. For more information about custom agent roles, see *Custom agent roles*.
user.id	The user's ID.
user.locale	The user's locale (for example: en-US).
user.signature	The agent's signature. Only agents have signatures.
user.organization...	See *Organization data* below.
user.tags	Tags. See *Adding tags to users and organizations*.

Organization data

Each type of user can be added to an organization. An organization contains the following data properties.

Table 29: Organization data object

Properties/placeholders	Description
user.organization.id	The ID of the organization that the user is assigned to.
user.organization.name	The name of the organization that the user is assigned to.
user.organization.is_shared	True or False. Indicates if the organization is a shared organization.
user.organization.is_shared_comments	True or False. Indicates if the organization allows users to add comments to other user's tickets.
user.organization.details	Details about the organization.
user.organization.notes	Notes about the organization.
user.organization.tags	Tags. See *Adding tags to users and organizations*.

Since all users can be added to an organization, you can access the organization data for each using Liquid markup. For example, you can return data for each of the these types of users (shown here as placeholders):

- {{ticket.organization.name}}, which is the ticket requester's organization

- {{ticket.requester.organization.name}}, which the same as {{ticket.organization.name}} (the requester)
- {{current_user.organization.name}}, who is the user currently updating the ticket (an end-user or agent)
- {{ticket.assignee.organization.name}}, who is the agent assigned to the ticket
- {{ticket.submitter.organization.name}}, who is either the user who submitted the request or the agent that opened the ticket on behalf of the requester

Ticket data

Zendesk tickets contain the following data properties.

Table 30: Ticket object data

Properties/placeholders	Description
ticket.title	The ticket subject.
ticket.description	The ticket description (the first comment).
ticket.url	The full URL path to the ticket (excluding "http://").
ticket.id	The ticket ID.
ticket.created_at	Time the ticket was created (for example, May-18).
ticket.updated_at	Time the ticket was last updated (for example, May-18).
ticket.external_id	The external ticket ID (if one exists).
ticket.via	The source type of the ticket (Web form, Mail, Twitter, etc.).
ticket.status	The ticket status (New, Open, Pending, Solved, Closed).
ticket.priority	The ticket priority (Low, Normal, High, Urgent).
ticket.ticket_type	Ticket type (Question, Incident, Problem, Task).
ticket.score	The ticket score.
ticket.group.name	The group assigned to the ticket.
ticket.organization.name	See *Organization data* above.
ticket.due_date	The ticket due date (relevant for tickets of type Task). The format is: May-18.
ticket.account	The help desk name.
ticket.cc_names	The list of CC email addresses.
ticket.tags	All of the tags attached to the ticket.
ticket.in_business_hours	True or False. True if the ticket update is during business hours as defined in **Settings > Account > Localization > Business Hours**.

Properties/placeholders	Description
ticket.ticket_field_<*field ID number*>	Property/placeholder format for custom fields. See *Placeholders for custom fields*.
ticket.ticket_field_option_title_<*field ID number*>	Property/placeholder format for the option titles of a drop-down custom field. See *Placeholders for custom fields*.

Comment data

Comments are added to tickets, so they can be accessed as a ticket data object.

Table 31: Comment data object

Properties/placeholders	Description

ticket.comments	Used as a placeholder, {{ticket.comments}} displays all the comments in a ticket (both public and private). Although private comments are always filtered out of the notifications that are sent to the requester.
	
	 Ticket.comments also serves as a collection for comment and attachment details. You can access the following data using Liquid markup:
	
	 • comment.author.name
	 • comment.created_at
	 • comment.value
	 • comment.attachments
	
	   • attachment.filename
	   • attachment.url
	
	 For an example of accessing this data in business rules, see *Customizing the formatting and placement of text in comments and email notifications*.

ticket.comments_formatted	All public and private comments, most recent first. **Note:** Private comments are filtered out of notifications that are sent to end-users.
ticket.public_comments	All public comments, most recent first. Unformatted text.
ticket.public_comments_formatted	All public comments, most recent first.
ticket.latest_comment	The most recent comment (both public and private). Unformatted text.
ticket.latest_comment_formatted	The most recent comment (both public and private).

Properties/placeholders	Description
ticket.latest_public_comment	The most recent public comment. Unformatted text.
ticket.latest_public_comment_formatted	The most recent public comment.
ticket.latest_comment.author.name	The name of the person who made the last comment.
ticket.latest_public_comment.author.name	The name of the person who made the last public comment.
ticket.latest_comment.created_at	The date of the last comment in the following format: Month-Date (for example, May-18).
ticket.latest_public_comment.created_at	The date of the last public comment in the following format: Month-Date (for example, May-18).

Satisfaction rating data

The following data properties are available for customer satisfaction rating (see *Using customer satisfaction rating*).

Table 32: Satisfaction rating data object

Properties	Description
satisfaction.rating_section	A formatted block of text prompting the user to rate satisfaction.
satisfaction.current_rating	The text of the current satisfaction rating (e.g. "Good, I am satisfied").
satisfaction.positive_rating_url	A URL to rate the support positively.
satisfaction.negative_rating_url	A URL to rate the support negatively.
satisfaction.rating_url	A URL to rate the support.
satisfaction.current_comment	The comment that the user added when rating the ticket.

Setting up anonymous ticket submissions with Zendesk for Wordpress

The Zendesk for Wordpress plugin includes a comment form that you can add to the Wordpress admin dashboard so that your site users can easily submit support requests (see *Setting up and using the Zendesk for Wordpress plugin*). By default, only your registered help desk users can submit requests. You can however allow your Wordpress site users who do not also have a help desk account (considered anonymous users) to submit support requests.

There are several easy steps to set this up:

1. Enable anonymous ticket submissions in the Zendesk for Wordpress plugin.
2. Choose an existing help desk admin or agent who is also a user in your Wordpress site to act as the delegator for anonymous requests.
3. Have the assigned agent log in to the help desk via the Zendesk ticket widget to authenticate their account.

This delegator role is simply a means to access your help desk and submit the request on behalf of the anonymous user. Depending on how your help desk is set up (open or registered users only), the requester may also be required to register with your help desk and create a login so that they can follow up with the ticket.

Note: Anonymous requesters are never aware that their request was submitted via this delegator; it's all done under the hood via the Zendesk API.

When you're setting the visibility permissions for your Wordpress site users (see *Setting the dashboard widget visibility by user type*), you should allow all agent users to see the ticket widget on their Wordpress dashboard so that they can log in to the help desk to be authenticated via the widget, which is required to set up this delegation.

The delegation agent needs to login here before they can be assigned the delegator role:

To allow anonymous support requests
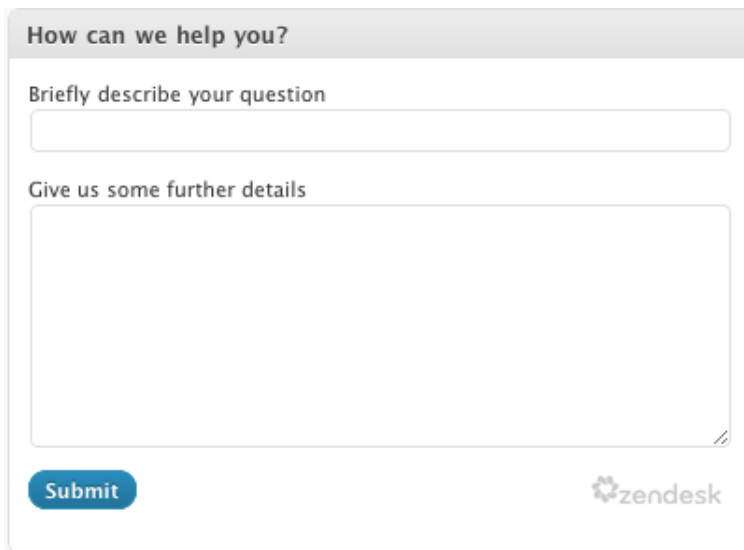
1. Log into Wordpress as an admin.
2. Select **Settings** from the Zendesk panel.
3. You should have first enabled the contact form for one or more types of users via the visibility settings described in *Setting the dashboard widget visibility by user type*.

4. Select the **Anonymous Requests** check box.

5. Select a help desk agent from the **Anonymous Requests By** drop-down list.

    Note: Only agents that have logged into the help desk via the ticket widget are shown in the list.

6. Click **Save Settings**.

Anonymous help desk users can now submit requests using the contact form on the Wordpress admin dashboard.

Follow up on requests submitted via this form are through the normal help desk workflow (Web portal and email, etc).

Another way to create tickets for anonymous users is to convert blog comments into tickets (see *Converting a blog post comment into a ticket*).

Setting up remote authentication for WordPress

By setting up remote authentication for the Zendesk for WordPress plugin, your WordPress site users access your help desk using their WordPress user ID and password. They access your help desk at the usual URL (http://*mycompany*.zendesk.com) but logging in happens through the WordPress log in page, which is displayed when they click the login link in the help desk. When they are successfully authenticated by WordPress, they are seamlessly logged in to the help desk.

Once you've set up remote authentication, all user management and authentication happens in WordPress, not in Zendesk. In other words, you don't add or manage help desk users in Zendesk. All of that happens in WordPress.

If you switch to remote authentication after you've already set up users in Zendesk, they will no longer have access to those user accounts (their old Zendesk login). You can however make sure that their former help desk identity is associated with their WordPress user account by using the same email address in both user accounts. In other words, if a user's WordPress account uses the same email address as their Zendesk acount, the two accounts will be synced. If a different address is used, a separate user account is created.

To configure remote authentication for the Zendesk for WordPress plugin

This process is a back and forth between your WordPress site and Zendesk. Log in to both as an admin.

Note: You need to have already installed the Zendesk for WordPress plugin. For more information about setting up and using the Zendesk for WordPress plugin, see *Setting up and using the Zendesk for WordPress plugin*.

1. In Zendesk, select **Settings > Security**.
2. Select **Single Sign-on > Enabled**.
3. In WordPress, select **Remote Auth** from the Zendesk panel.
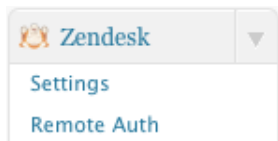
4. Select and copy the **Remote Login URL**.

5. In Zendesk, copy the URL into the **Remote Login URL** input box.

6. If you want your users to return to your WordPress site after logging out of the help desk, copy the **Remote Logout URL** in WordPress and paste it into the **Remote Logout URL** in Zendesk.

7. In Zendesk, select the **Allow update of external ids?** option.

8. In Zendesk, select **Shared secret > Generate a new token**. Select and copy the token.

   Note: It's a long number and may exceed the length of the text control that it's displayed in so double-click the number to make sure you've selected it all.

9. In Zendesk, click **Save Tab**. You've finished the Zendesk part of this set up.

10. In Wordpress, copy the shared secret into **Remote Auth Shared Token**.

11. Click **Save Changes**.

Now all help desk users, including yourself, will be authenticated through your WordPress site when logging in to the help desk.

Note: If you, as a help desk admin, need to log in to Zendesk with your Zendesk user account, you can do so at the following URL: http://*mycompany*.zendesk.com/access/normal.

Setting up and using the Zendesk for Wordpress plugin

Using the Zendesk for Wordpress plugin, you can connect your Wordpress site and its users to your help desk. Using the plugin you can do the following in Wordpress:

- Allow your registered or unregistered (anonymous) help desk users to submit support requests from within the Wordpress admin dashboard. For information about allowing anonymous users to submit tickets, see *Setting up anonymous ticket submissions with Zendesk for Wordpress*.
- Convert blog comments into tickets and add a public comment that can also be posted as a reply in the blog post.
- View all of the help desk tickets in the tickets widget, which is added to the admin dashboard.
- View details for each ticket and then open them in your help desk to make updates.
- Add a contact form to the admin dashboard so that your site users can quickly make support requests.
- Set the visibility permissions for each type of registered Wordpress site user (administrators, editors, authors, contributors, subscribers), allowing them to either see the tickets widget or the contact form.
- Add a dropbox to your site.
- Allow your users to log in to your help desk using Remote Authentication. See *Setting up remote authentication for Wordpress*.

Installing the Zendesk for Wordpress plugin

The Zendesk for Wordpress plugin can be added to your Wordpress site just like any other plugin. Plugins are only supported in self-hosted Wordpress sites (wordpress.org), not free hosted sites on wordpress.com.

To install the Zendesk for Wordpress plugin

1. Download the plugin at *http://wordpress.org/extend/plugins/zendesk/*.
2. Log in to your Wordpress site as an admin.

   Note: If you installed a beta version of the Zendesk for Wordpress plugin, delete it in Wordpress before installing the new version.
3. In the dashboard, select **Plugin > Add New**.
4. Select **Upload**.
5. Click **Browse** to select the file you downloaded (zendesk.zip).
6. Click **Install Now**.
7. After the file is uploaded and installed, click **Activate**.

The next step is to configure the plugin with your Zendesk account information and then select the features that you want to enable.

Configuring the plugin settings

Activating the plugin adds a new panel to the Wordpress admin dashboard, as shown here:
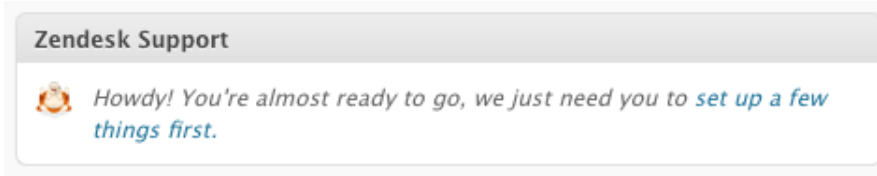
You need to configure your Zendesk subdomain to access your help desk in Wordpress.

To configure your Zendesk account

1. Click the set up link and you'll be prompted to enter your Zendesk subdomain.

2. Enter your Zendesk subdomain.

   Note: If you use host mapping, this is automatically detected when you save the account settings.

3. Click **Save Settings**.

You will next be prompted to optionally set the visibility permissions for your registered site users, customize the contact form, allow support requests from unregistered (anonymous) help desk users, and to add a Zendesk dropbox to your Wordpress site.

For information about allowing anonymous users to submit requests, see *Setting up anonymous ticket submissions with Zendesk for Wordpress*.

You can set these options immediately or later by selecting the Zendesk settings from the Zendesk for Wordpress panel, as shown here:
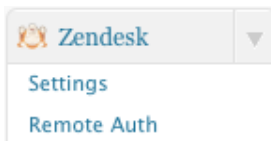
Setting the dashboard widget visibility by user type

You can add either the contact form or the Zendesk ticket widget to the dashboards of the registered users (administrators, editors, authors, contributors, subscribers) of your Wordpress site. The contact form allows them to submit support requests directly from Wordpress and the ticket widget allows users who are also help desk agents to view tickets and quickly access the help desk to make ticket updates. In other words, the contact form is for users who need to submit support requests and the tickets widget is for agents to manage tickets.

To set the dashboard visibility

1. When you initially set up the plugin, the settings page is displayed after you've configured your Zendesk account. You can otherwise access this page by selecting **Settings** from the Zendesk panel. Visibility permissions are set in the **Dashboard Widget Visibility** section.

2. For each type of registered site user you can specify the following:

- Don't display anything
- Show a contact form
- Show the tickets widget

3. Choose a visibility setting for all user types:

- Administrators
- Editors
- Authors
- Contributors
- Subscribers

4. Click **Save Changes**.

Customizing the contact form

Using the contact form, your registered site users can submit support requests.

The contact form is added to the Wordpress dashboard when enabled for the types of users described above. You can modify the wording of each element of the form (title, summary, description, and the button label) on the **Settings** page.

Note: You cannot currently add custom fields or otherwise modify this form.

To customize the contact form

1. Select **Settings** from the Zendesk panel.
2. In the **Contact Form Settings** section, enter text for the form title, summary label, details label, and submit button label.
3. Click **Save Settings**.

Adding a dropbox to your Wordpress site

Using the Zendesk for Wordpress plugin, you can also easily add a dropbox to your Wordpress site. You use the dropbox code generated by the help desk in **Settings > Channels > Zendesk Dropbox**.

To add a dropbox to your Wordpress site

1. Select **Settings** from the Zendesk panel.
2. Select one of the following dropbox display settings:

   - Do not display the Zendesk dropbox anywhere (this is the default)
   - Display the Zendesk dropbox on all posts and pages
   - I will decide where the Zendesk dropbox displays using a template tag

3. If you selected to display the Zendesk dropbox on all posts and pages, enter the dropbox code from **Settings > Channels > Zendesk Dropbox**.
4. If you selected to use a template tag, enter the dropbox code from **Settings > Channels > Zendesk Dropbox**. You can then place the dropbox where you would like it on your site using the following template tag:

```
<?php if ( function_exists( 'the_zendesk_dropbox' ) )
  the_zendesk_dropbox(); ?>
```

5. Click **Save Settings**.

The dropbox behaves as it would when added to any other web site. You can, for example, configure it to also allow users to chat with agents and to search your knowledge base.

Submitting a request from the dashboard

Registered site users who have been granted permission to see the help desk contact form (shown above) on their dashboards, may submit support requests. These users can either be registered users in your help desk or you can allow unregistered (anonymous) users to submit requests (see *Setting up anonymous ticket submissions with Zendesk for Wordpress*).

Users simply fill out the contact form and click **Submit**. If you've configured the plugin to allow anonymous submissions, then the requester is not prompted to log in to the help desk; an agent acts as the delegate for anonymous requests. If not, all your users must log in to the help desk before submitting requests. After a request is submitted, the requester receives the usual email notification.

Using the ticket widget

Using the tickets widget, agents can view tickets using all of the shared views in your help desk.

By selecting **Change View** you see and can switch to any of the shared views in your help desk.

Zendesk for WordPress

Change view (cancel)

My unsolved tickets

Unassigned tickets

All unsolved tickets

Consumer Support – Unsolved Tickets

Digital Cameras

Engineering – Open High Priority Tickets

Important Twickets

Open Tickets

Product Design – To-Do Items

Recently solved tickets

(My Helpdesk) Logged in as **agent@mondocam.com** (logout)

zendesk

By clicking on a ticket, you see summary information about the ticket and can access the help desk to make updates.

Zendesk for WordPress

Viewing Ticket #198 (back)

Subject:	How do I use f-Stop?
Description:	Help!
Ticket Status:	Solved
Requested by:	Matt Price
Created:	June 1, 2011 at 10:58 am
Updated:	June 1, 2011 at 11:02 am

Actions

Comments:	View the comments thread
View:	View this ticket on Zendesk

(My Helpdesk) Logged in as **agent@mondocam.com** (logout)

zendesk

Converting a blog post comment into a ticket

You can convert blog comments into tickets in the dashboard. Only comments that have been submitted along with an email address can be converted into a ticket. The commenter's email address is used to add them to the help desk and enable follow up communication about the ticket.

To convert a comment into a ticket

1. In the Wordpress admin dashboard, select the **Comments**.
2. Locate the comment you want to convert to a ticket and click **Convert to Zendesk Ticket**.
3. You'll be prompted to enter a comment, which can be posted as a response in the post. Enter your comment and then optionally select either or both of these two options:

    • Make this a public comment in the ticket
    • Post as a reply on this blog post
4. Click **Create Ticket**.

All follow up on the ticket occurs within the help desk.

Chapter

10

Supporting multiple languages

Configuring your help desk for your locale and language

The default configuration of Zendesk is in the English language. The agent and administrator user interface is currently in English only. However, the end-user experience supports other languages. For example, the Web portal can be displayed in more than 40 languages and you can update the system messages and the default business rules (automations, macros, and triggers) that contain English language text that is used in email notifications to your end-users.

You can switch your help desk to a different default language by making changes to your account settings and updating the default business rules that contain text in English. Making these changes will enable you to change your help desk from English to a different language.

If you want to support more than one language, see *Configuring your help desk to support multiple languages*.

The help desk fully supports UTF-8 (Unicode) and all languages can be added to forms, comments, tags, and so on.

To switch your help desk to a different language, you'll need to do the following:

- *Set your time zone and format*
- *Translate the system-generated new user email notifications*
- *Optionally, add translated text to the agent signature*
- *Translate the text in the default automations, macros, and triggers*
- *Set a new default language for the end-user Web portal*
- *Translate the name of the Forums tab*
- *Replace the welcome message on the home page*
- *Create your knowledge base*
- *Optionally, create a Feedback Tab*
- *Optionally, disable keyboard shortcuts*

Setting your help desk time zone and format

You can set the time zone and format for your Zendesk account that corresponds to your locale. This can be done by administrator by selecting **Settings > Account > Localization**.

You'll want to set your time zone so that all timestamps (dates that are saved in your tickets, forum posts, and so on) match your location.

Select any of the standard GMT time zones.

Time zone   (GMT+01:00) Budapest

You can also select either the 12-hour or 24-hour time format.

Time Format

✓ 12 hour clock (10:42 pm)
24 hour clock (22:42)

~~Configures how time is formatted~~ throughout your zendesk.
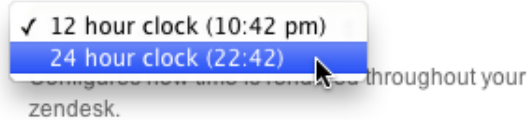
Note: There is currently no support for locale specific date and number formats.

In the Plus+ and Enterprise versions of Zendesk, you can allow your staff and end-users to set their own time zone. In these versions of Zendesk, the time zone can be set in the user profile.

Translating system-generated new user email notifications

When end-users sign up to use your help desk, they receive a number of email notifications (the new end-user registration, welcome, and email verification messages). By default, these are in English but you can easily translate them into another language by selecting **Settings > End-users** and editing the messages.

The user registration message:

```
Please fill out this form, and we'll send you a welcome email to verify your email
 address and log you in.
```

The user welcome message:

```
Please follow the link below to choose a password, and we will log you in right
 away.
```

The email verification message:

```
We need to verify that you are the owner of this email address. Please follow the
 link below to verify.
```

If you run an open help desk and therefore don't require your end-users to register and log in, they will not receive any of these messages. See *Setting up an email-only help desk*.

If you're using dynamic content (see *Using dynamic content to provide multiple language support*), you'd replace this text with placeholders that automatically insert the appropriate language when the email notifications are sent.

Adding translated text to the agent signature

In the agent settings (**Settings > Agents > Signature**), you can choose to include the agent's signature in all outgoing email notifications that are sent to requesters. Placeholders are used to dynamically insert the signature and phone number that agents add to their own user profiles.

Signature

{{agent.signature}} - {{agent.phone}}

Template for adding a signature to all public agent comments on tickets.

Learn more

The placeholders are used to insert the agent's data when the email notifications are sent.

Many help desks choose to add some additional text to the account signature. If you'd like to do the same in your default help desk language, enter it here. For example:

```
{{agent.signature}} - {{agent.phone}}
Toute l'équipe du Support MondoCam
```

If you use *dynamic content*, you'd add a dynamic content placeholder here instead.

Translating the text in the default automations, macros, triggers

When you create a Zendesk account, a number of *automations*, *macros*, and *triggers* are included to help you get started managing your support workflow. Each of these contain text in English that is sent to end-users in email notifications.

To change this text to a different language, manually translate the English text in the following business rules:

- Trigger: Notify requester of received request
- Trigger: Notify requester of solved request
- Automation: Request customer satisfaction rating (added to your help desk if you've enabled customer satisfaction rating)
- Macro: Close and redirect to topics
- Macro: Downgrade and inform

If you support more than one language, you can also use Liquid markup to generate messages in more than one language from a single business rule. For example, you can edit the **Notify requester of received request** trigger to generate messages based on the user's language setting. For more information, see *Supporting multiple languages in automations, macros, and triggers*.

In the Plus+ and Enterprise versions of Zendesk, you can use dynamic content (see *Using dynamic content to provide multiple language support*) to manage content for multiple languages. Using dynamic content, you replace the text with a dynamic content placeholders that automatically insert the appropriate language version of the text based on the user's language.

Configuring your Web portal to support your language

The Web portal can be displayed in more than 40 languages. Selecting a different language switches all of the text in the user interface to that language. These translations are available in your Zendesk and you can switch to one of these language by following the steps below (*Setting the Web portal default language*). You'll also need to manually translate the Forums tab name and update the home page welcome message.

Once you've fully translated the user interface text in the Web portal, you can create a knowledge base in your supported language.

Setting the Web portal default language

All Zendesk accounts can change the default language for the Web portal to something other than English. This affects the following pages: submit request, track requests, the home page, and the knowledge base.

To set the default language for the Web portal

1. Log in as an administrator.
2. Select **Settings > Account > Localization**.
3. In the **Languages** section, select one of the more than 40 supported languages.
4. Click **Save Tab**.

Your Web portal is now displayed in the new default language.

The agent's view of the forums does not change, it is still displayed in English.

If you support users in multiple languages, you can also allow your end-users to select the language that is displayed in the Web portal (see *Selecting the languages you want to support*).

Translating the name of the forums tab

When you select a default language for the Web portal, the text in the user interface is displayed in the language you selected. There is one exception however. The **Forums** tab title is set in **Settings > Channels > Web Portal > Forums Name**. The **Forums** tab title is not included in the Web portal translations because it is customizable and is often changed to 'Knowledge Base' or 'Help'. Therefore, you must set it yourself.

If you use *dynamic content*, you'd enter the placeholder here instead of text.

Changing the welcome message on the home page

At the top of your help desk home page is a welcome message in English.
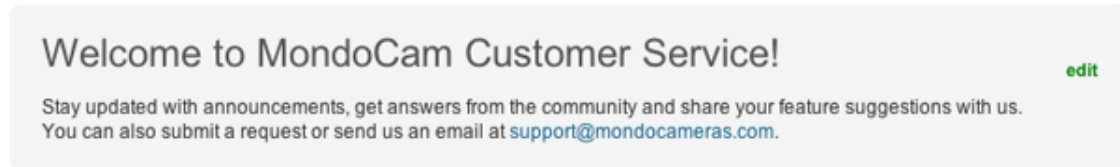
You can easily change this text by logging into the help desk, choosing the home page, and then selecting the **Edit** link in the welcome message container.
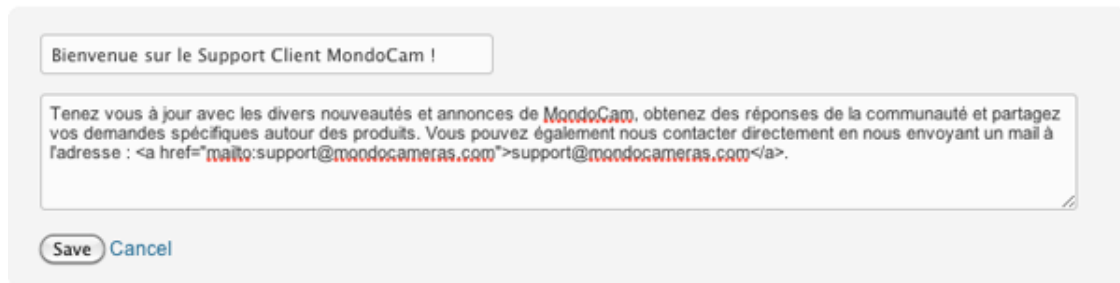
Like the **Forums** tab name, the title and description text can be replaced with *dynamic content* placeholders.

Creating knowledge base content in your help desk language

You can add any language as content in the forums. Therefore, if you set your default help desk language to something other than English and want to create a knowledge base in that language, adding content in another language is as simple as it would be in English. Just create categories, forums, and topics and add your content as needed.

If you want to support multiple languages in your forums, you can choose to display forums based on the end-user's language. See *Displaying forum content based on language*.

Creating a Feedback Tab in a different language

As with the Web portal, you can display the Feedback Tab (**Settings > Channels > Feedback Tab**) in a language other than English. For example, if you want to include the Feedback Tab in your Web portal, you select the language when setting the Feedback Tab options and generating the JavaScript code that you include in a Global JavaScript widget.

Note: If you support more than one language and want Feedback Tabs on each of your localized web sites, you create Feedback Tabs for each and then place that JavaScript code in each localized web site.

Here's what the Italian version of the Feedback Tab user interface looks like to your end-users:
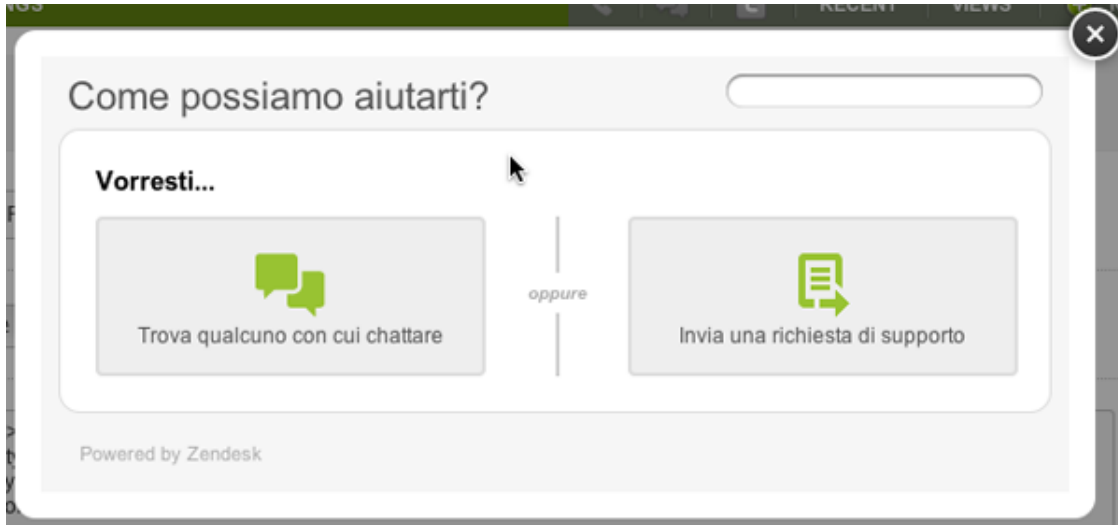
The Feedback Tab itself, which is placed along the edge of the Web browser, looks like this:

When you create a Feedback Tab, you select one of the following titles to use. They are images and are in English only.
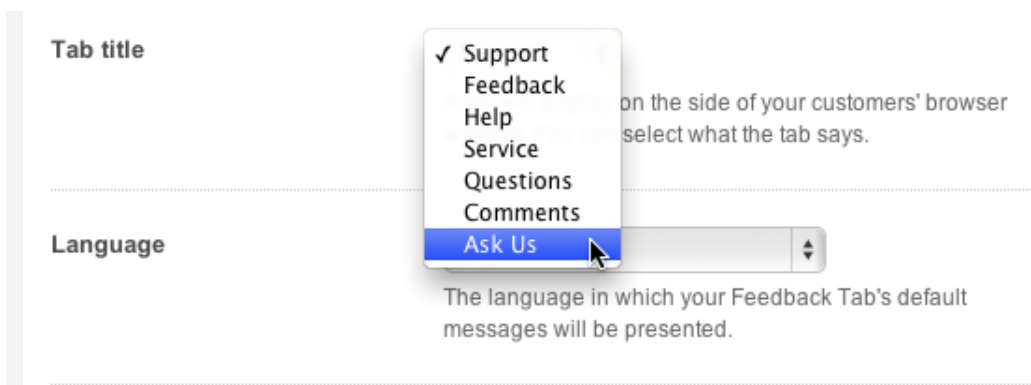
To create a translated version of the Feedback Tab title, you need to create a custom image. Follow the instructions in *Creating your own Feedback Tab translation* below.

Note: If you're curious, your language selection isn't explicitly declared in the JavaScript code that is generated for the Feedback Tab. It is instead associated with the Feedback Tab ID (called the

dropboxID) in the code below. When the Feedback Tab is clicked on and opened, the JavaScript code displays the language you selected when you created it.

```
<script type="text/JavaScript" src="//asset0.zendesk.com/external/zenbox/
v2.4/zenbox.js"></script>
<style type="text/css" media="screen, projection">
  @import url(//asset0.zendesk.com/external/zenbox/v2.4/zenbox.css);
</style>
<script type="text/javascript">
  if (typeof(Zenbox) !== "undefined") {
    Zenbox.init({
      dropboxID:   "20038398",
      url:         "https://mycompany.zendesk.com",
      tabID:       "support",
      tabColor:    "black",
      tabPosition: "Left"
    });
  }
</script>
```

Creating your own Feedback Tab translation

You also have the option of creating your own translation by selecting the **Advanced Customization** tab (**Settings > Channels > Feedback Tab > Advanced Customization**) and entering your own text.

Even if you do not want or need to create your own translation, you'll most likely want to add a customized tab title. As noted above, the default tab titles are in English only.

If you want to change the Feedback Tab title to another language, you need to create and host an image that is 45 pixels wide and 108 pixels tall in a vertical orientation. You then link to that image from the **Advanced Customization** tab.
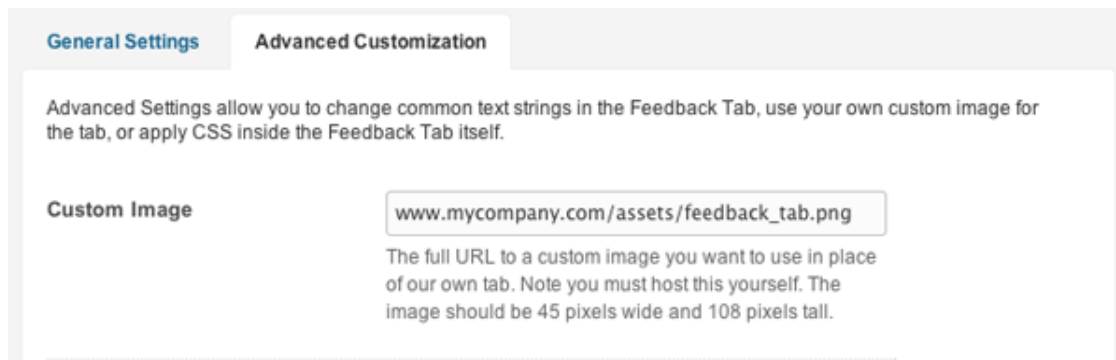
The supported image formats are PNG, GIF, and JPG.

Disabling keyboard shortcuts

The agent and administrator help desk interface contains several keyboard shortcuts that conflict with keyboard shortcuts for entering characters in some other languages. Although it's not possible to remap these shortcuts, they can be disabled by an admin using a custom JavaScript widget.

When editing tickets, the following keyboard shortcuts for submitting tickets are available:
- CTRL+S, which is a shortcut to submit the ticket update.
- CTRL+SHIFT+S, which is a shortcut to submit the update and open the next ticket.

CTRL+S is also available to agents and admins in the new ticket form.

To add a widget to disable keyboard shortcuts

1. Select **Settings > Extensions > Add Widget**.
2. Select the **Global JavaScript** widget.
3. Enter a title for the widget. For example: *Disable keyboard shortcuts*.
4. Set **Available for** to **Anyone, including people who have not logged in**.
5. In the **Content** input, enter the following code:

```
jQuery(function() {
jQuery(document).unbind('.zendesk.keyboard-shortcut');
});
```

6. Click **Submit**.

Note: This widget will not disable CTRL+M, also available when updating tickets, which opens the **Apply Macro** menu.

The keyboard shortcuts are still displayed in the **Submit** drop-down menu options, but are now disabled.

Configuring your help desk to support multiple languages

Configuring your help desk to support a language other than English is described in *Configuring your help desk for your locale and language*. If you support multiple languages, you'll need the Plus + or Enterprise versions of Zendesk.

These versions of Zendesk allow you to select multiple languages, which are then available to end-users in the Web portal. Your language choices are also used to determine what language is used in system messages and the email notifications that are generated by your business rules.

You first configure your account settings to support multiple languages. You then create and manage translations of all the content that is sent in email notifications to your users and modify your business rules to automatically send that content based on the user's language. Finally, you set up your forums to provide knowledge base content in your supported languages.

The key to providing multiple language support is *dynamic content*. This feature allows you to create content in your default language and then variants based on language. Each content item is referenced by a placeholder that you include in your automations, macros, and triggers. Dynamic content is described in detail in *Using dynamic content to provide multiple language support*. This article describes the multiple language account and forum settings and how to create a workflow based on language.

Selecting the languages you want to support

To provide support for multiple languages, you must first select those languages from the more than 40 languages that are available in Zendesk. To do this, select **Settings > Account > Localization**.

There are two language settings: the default language and additional languages. If you haven't already done so, select the default language. This is the language that end-users see in the Web portal by default.

In the Plus+ and Enterprise versions of Zendesk, you can select additional languages to support.

This means that your end-users will have the option of selecting one of these additional languages when they visit your Web portal. The language selector is added to the top menu bar in the Web portal.

In addition to providing a translated user interface in the Web portal, your language settings are used throughout the help desk to help you manage your workflow. For example, you can create automations or triggers that route tickets through your workflow based on the language setting of the requester.

Creating a multiple language workflow is described in *Using a requester's language in your business rules* below.

Setting and detecting a user's language

In the Plus+ and Enterprise versions of Zendesk, all your user's can set a language preference in their user profile (this includes both your staff and your end-users).

If present, this setting can be used in your business rules to, for example, determine which dynamic content language variant is used or to route tickets to specific groups or agents.

The list of available languages is the same as the languages you selected in **Settings > Account > Localization**. If the user's language is not supported, they cannot select it.

A user's language preference can be set in the following ways:
- The user can set their own language preference by editing their profile.
- Agents with user management permission can set a user's language preference.
- You can set a user's language with the **Set requester's language** action, which is available in automations and triggers.

For unknown end-users (those who do not yet have an account in your help desk or registered users who have not logged in) the language can be detected in several ways.

In the Web portal, end-users can select one of your supported languages themselves from the menu bar (as shown above in *Selecting the languages you want to support*).

When an unknown end-user has selected a language, the support request submit form, like the rest of the Web portal, is set to that language. Then, when the end-user submits a support request, the language is identified, the unknown end-user's unverified account is flagged with the language, and the response email notification is in the selected language (if you've set up dynamic content to handle this).

This works the same way with Feedback Tabs. The language you set when creating a Feedback Tab is used as the language for unknown end-users.

An unknown end-user's language can also be detected even if they do not explicitly set a language preference in the Web portal. Zendesk may be able to detect a user's preferred language from their Web browser preference setting. The accept-language header, which is passed via HTTP, contains information about the user's language preference. If that is present, the language can be detected.

Setting your business hours

When providing multiple language support, it may be helpful to also set business hours, which you can then use to help automate your workflow. The business hours you set are relative to the time zone you select (see *Setting your help desk time zone and format*).

Once you've established your business hours, you can use this information in SLAs (service level agreements), automations, triggers. and reports. For example, in both automations and triggers there is a condition called **Within business hours?** that you can use to determine how requests should be handled when they are received in your help desk.

For several examples of how business hours can be used, see *Tip of the Week: Using business hours in your triggers and notifications*.

Displaying forum content based on language

One of the ways you can provide support in multiple languages is to create a knowledge base that contains content in each of your supported languages. You can of course add content in any language you'd like and display it all side by side in the forums. However, to create a better user experience you can restrict forums to specific languages. This setting is available when creating or editing a forum.

You can select any of the languages that you chose to support in **Settings > Account > Localization > Language**.

The language restricted content is visible to logged-in users who have that language preference set in their user profile, when a user selects the language from the language menu in the Web portal, and if an unknown user's language can be automatically detected.

Note: Only forums, not categories or individual topics, can be restricted by language.

Using a requester's language in your business rules

Knowing your user's language means that you can use that information to determine how to respond to your users and how to move tickets through your workflow. As described above in *Setting and detecting a user's language*, there are a number of ways that a user's language can be set or detected.

Regardless of how the user's language is identified, it is accessible in automations, reports, triggers, and views via the **Requester's language** condition. Using this condition, you can, for example, assign incoming tickets to specific groups or agents based on language. You can also create views and reports to track tickets by language.

The **Requester's language** condition allows you to test for a specific language and then act on that information. You also have the option of explicitly setting the user's language with the **Set requester's language to** action, which is available in automations and triggers.

Here are some examples that describe how to use the **Requester's language** condition and **Set requester's language to** action to build a workflow based on language.

Using dynamic content to communicate in multiple languages

Although it's possible to create a multiple language response within the email body of, for example, a trigger using Liquid markup (described here *Using Liquid markup to support multiple languages in automations, macros, and triggers*), you should instead use dynamic content. One of the advantages of doing so is that language detection is handled automatically, you don't need to write Liquid markup for each of the languages you support.

As described in *Using your dynamic content*, dynamic content and its language variants can be referenced in many places in your help desk using a placeholder. In the example in that article, a message describing how end-users can reset their passwords is added to a macro by simply adding the placeholder as the text in a macro action. Based on the user's language, the correct language variant of the dynamic content is used.

All of your help desk content (from the welcome message to automated responses in your business rules) should be managed with dynamic content.

Assigning a ticket to a group or agent based on language

As you receive support tickets in the different languages you support, you can use automations and triggers to automatically route them through your workflow. As an example, imagine that your help desk supports three languages (English as the primary and default language and also French and German). You've structured your organization to support this by creating groups of agents that are fluent in French and German. When you receive support requests in either French or German you use a trigger to automatically assign those requests to the appropriate group.

This is easily done using the **Requester's language** condition, which is available in automations, reports, triggers, and views.

In this example, tickets from French language users are automatically assigned to the French support group.

Creating views and reports based on language

The **Requester's language** condition can also be used to create reports and views based on language.

You can also make the view visible to agents in a specific group.

In this example, the view is only visible to agents in the Italian Support group.

This works the same way in reports; use the **Requester's language** condition to select tickets in a particular language.

Setting a user's language preference with an automation or trigger

An end-user's language can be set using the **Set requester's language to** action, which is available in automations and triggers. You may want to use this action to set an end-user's language in those cases where the source of the support request is not otherwise identified as originating from a specific language. For example, if you use a separate support email address for each of the languages or locales that you support, you can use a trigger to then set the end-user's language based on that email address.

In this example, MondoCam uses the aide@mondocam.fr email address for its French language users. This email address is forwarded to french@mondocam.zendesk.com, which is the email address used in this trigger.

When a user's language is set via the **Set requester's language to** action, that event is added to the ticket's events and notifications.

Providing multiple language support with dynamic content

In the Plus+ and Enterprise versions of Zendesk, you can create dynamic content that can then be referenced via a placeholder in automations, macros, triggers and by many of the system generated messages such as those sent in email notifications when a user creates an account.

As an example of how dynamic content is used, the text of a message that you currently add to a macro can be replaced by a dynamic content placeholder.

This text:

```
If you forget your password, just click the login link in the upper right
 corner
of the help desk and then select the "Help! I don't know what to enter
 here!" link.

Thanks and have a great day!

The MondoCam Support Team
```

Is replaced with this placeholder:

```
{{dc.password_help}}
```

When the macro is applied to a ticket, the content is inserted into the ticket. If you're already using Zendesk placeholders in your help desk, you're already familiar with how this works. The difference between the Zendesk placeholders and dynamic content is that you define the content that is dynamically inserted into your business rules and communications with your customers.

Dynamic content is a combination of a default version of the text (typically in the same language as your help desk's default language) and variants for every other language that you support. In the example above, the default variant is in English. If your help desk also supports French and German, for example, you create variants for each of those languages. Then, based on the end-user's language, the appropriate variant is automatically used when the dynamic content is referenced and displayed to the end-user.

If the end-user's language is not one of your supported languages, the default variant is used.

Dynamic content provides you with a way to streamline support for multiple languages. You reference one placeholder and the appropriate language is displayed based on the end-user's language preference. How an end-user's language is detected is described in *How a user's language is set and detected*.

Of course when you support multiple languages, you must translate your content into the languages you support in your help desk. There are a number of ways to manage the translation of your default content. You create and edit all your language variants directly in the help desk or you can export all your dynamic content and send it off to a translation agency. You then import the dynamic content back into your help desk and all language variants are added.

If you later update the default content, the variants are flagged as being potentially out of date with the default content. Meaning that if you update the default content you probably need to also update

the translations in the variants. When an update is required, you simply repeat the export and import process to update the content. See *Managing the translation of your dynamic content*.

You can also manually set variants to be inactive so that they are not used. You might do this if your variant isn't ready to be made public (for example, if the translation is incomplete or incorrect).

Finally, how you use your dynamic content in automations, macros, and triggers is tracked so that you have an easy way to monitor their use.

Creating dynamic content

When you create a dynamic content item, you select the default language and enter the text of the dynamic content. You then create variants for each of your supported languages.
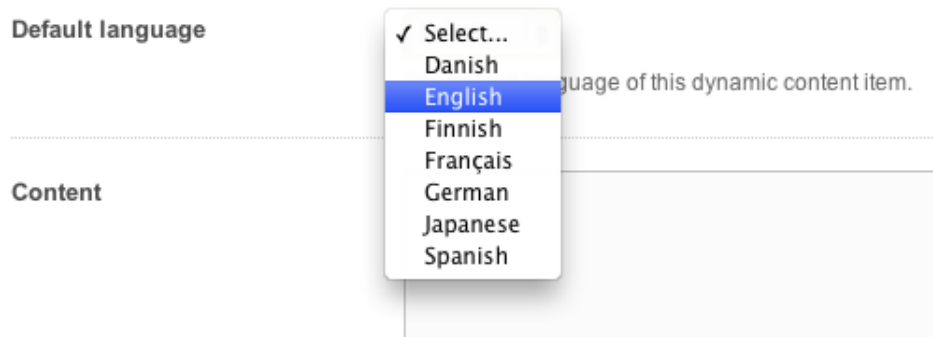
The list of languages you can choose from is based on your default help desk language and the additional languages you've chosen to support in **Settings > Account > Localization**. You can add language variants for all of the languages that are supported in Zendesk.

To create a dynamic content item

1. Select **Manage > Dynamic Content > Add Item**.
2. Enter a title for the dynamic content.
3. Select the default language.
4. Enter the text of the dynamic content.

    • You can use Zendesk placeholders in your dynamic content. For example, you can add placeholders for ticket and user properties. See *Zendesk data object (placeholders) reference*. You can also add other dynamic content placeholders.

5. Click **Create**.

When you create a dynamic content item, the detail page is displayed. Below the title of the dynamic content, you'll see the placeholder that you'll use to refer to this dynamic content in your automations, macros, triggers and in system messages.
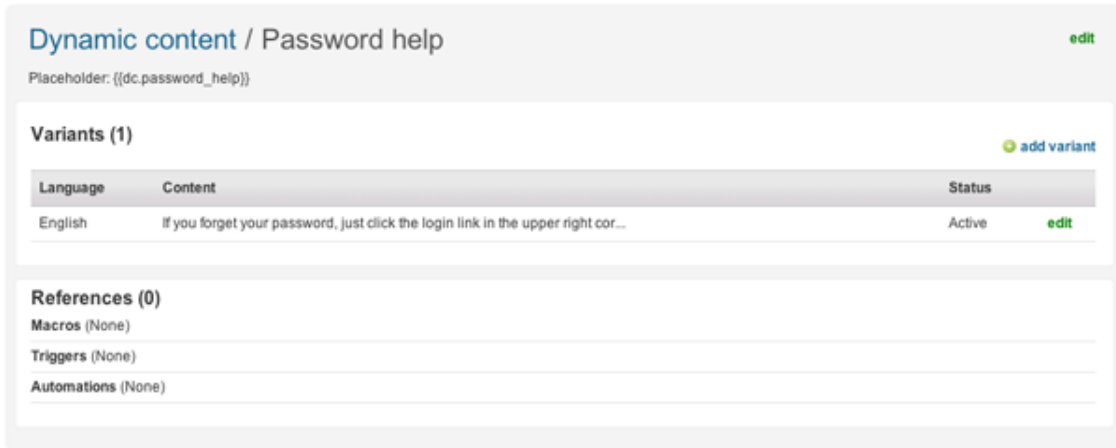
Note: Dynamic content placeholders always begin with the 'dc' prefix.

Once you use the placeholder, you'll see where its been used in the **References** section.

You can edit the dynamic content title by selecting **Edit**.

Note: Changing the title after you've created the dynamic content does not also change the placeholder name; it remains the same regardless of the subsequent changes you may make to the title.

The text of your default content, shown above in the **Variants** section, can be edited by clicking the **Edit** button in the table row.

After you create your language variants, they are listed in the **Variants** section of the page.

Creating variants

Variants are different language versions of the default variant.

To create a variant

1. Select **Add Variant**.
2. Select the variant language. The list of languages you can choose from is based on the languages you've chosen to support in **Settings > Account > Localization**.
3. Set the variant to **Active** or **Inactive**.

   Active means that the variant will be used as the text for all users of that language. When you set a variant to Inactive, you're disabling its use and users of the inactive language will instead see the default content variant. In other words, if the default content is in English and you make the German variant inactive, German users see English content. Typically, you set a variant to inactive if the variant's content is not ready to be made public (i.e., the translation is not complete).
4. You can also optionally set the variant to be the default variant, which overrides the current default variant.
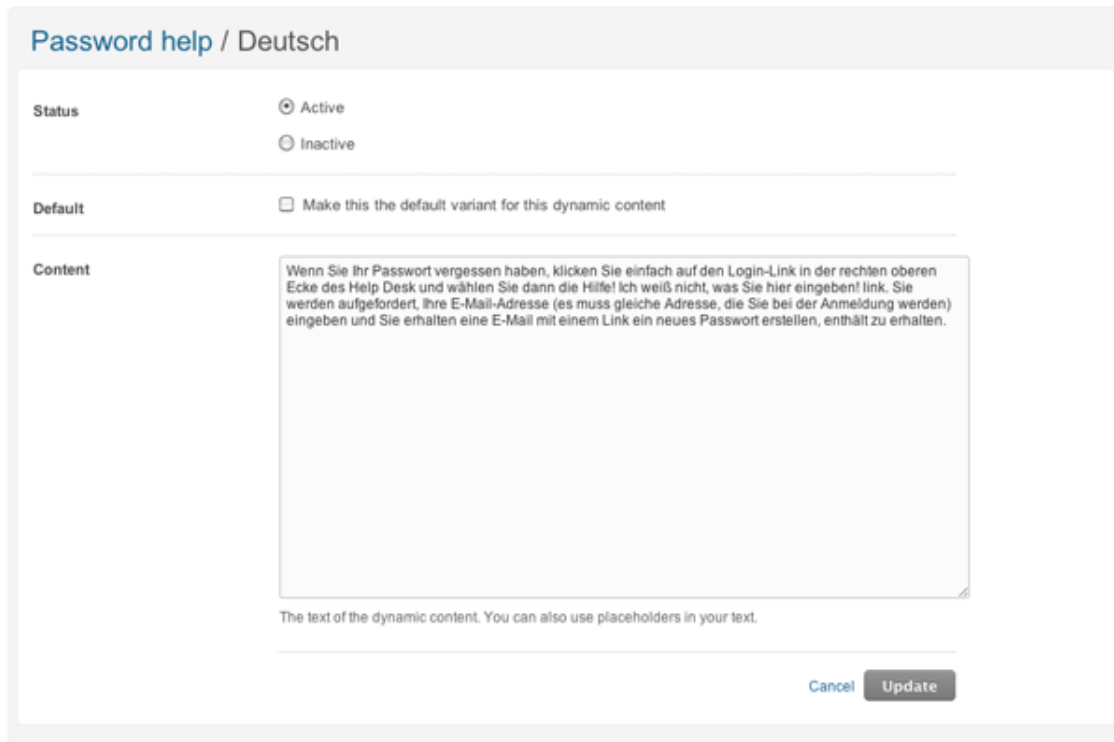
   Setting a language variant as the default variant is useful when you want to create dynamic content specifically for a group that supports a language other than your default help desk language. For example, a Japanese language support group can set default variants as Japanese. When you change the default from one variant to another, the status of the other variants changes to **Out of date**.

5. Enter the text of the variant language.

Depending on how you're managing the translation of the content, you can instead first create all your dynamic content in your default help desk language and then export the content and send it to a translation agency. An export file is created for each of the languages that your help desk supports. You then import the files back into your help desk and all of the language variants are added to the dynamic content. For information about managing the translation workflow, see *Managing the translation of your dynamic content*.

6. Click **Create**.

Here's an example of the password help dynamic content variant in German (translation courtesy of Google Translate).

When you add variants, they are listed as shown here:

In the list of variants, you'll see that the default content is flagged as the default. You can edit each variant by clicking **Edit**. You can also delete all the variants that are not the default. To delete the default variant you need to either set a different variant as the default or delete the entire dynamic content item. See *Deleting dynamic content*.

The status column in the list shows if the variant is active or inactive; the selections you made when creating or updating the variant. Status also conveys the state of variants relative to the default variant. When the default variant is updated and the other variants are not, the other variants are considered to be out of date with the default variant. In other words, it is assumed that if the default variant's text was updated then the other variants text should also be updated. To give you an indication that the text in the variants may be out of sync with the default variant, they are flagged as being out of date. Therefore, you may see the following statuses for your variants:

- Active
- Inactive
- Active (Out of date)

As described below (*Filtering the dynamic content list by status*), you can quickly view the dynamic content items that contain variants that are out of date.

Managing dynamic content

You can view all of your dynamic content by selecting **Manage** > **Dynamic Content**. To add variants to a dynamic content item, or to edit an item, click the item's title.

The list of dynamic content items contains the title, the date of the last update, and the status.

The status can be either of the following:

- **Current**, which means that the default content and all the variants are up-to-date.
- **Out of date**, which means that one or more of the variants are out of sync with the default content. In other words, the default content was updated and one or more of the variants were not. This status gives you a quick way to locate content that may need a translation update.

Filtering the dynamic content list by status

You can filter the list by status. By clicking the drop-down list located at the top left of the dynamic content table, you can filter the list using the following options:

Filtering by the out of date status allows you to quickly see the dynamic content that needs to be updated.

Organizing and viewing dynamic content by category

You can also organize your dynamic content into categories. This is done in the same way that you can organize your macros: just add the category name and double colons to the beginning of the dynamic content title. You can then filter the list by category.
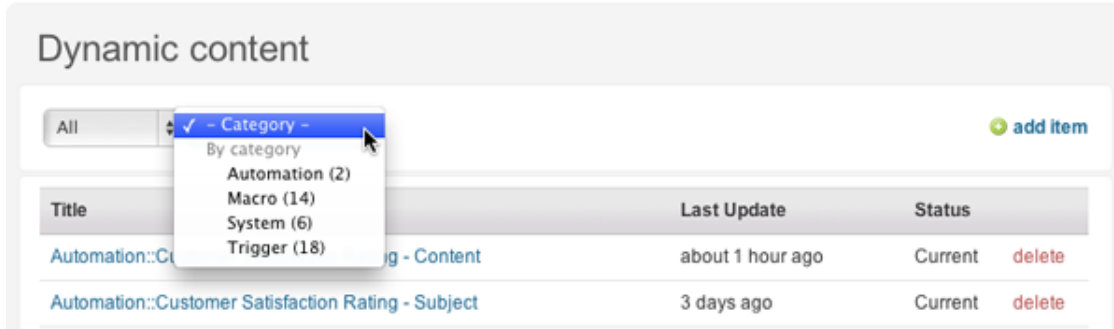
Deleting dynamic content

You can delete dynamic content only if it is not being referenced by your automations, macros, or triggers. How your dynamic content is being used is shown in the **References** section of each dynamic content item.
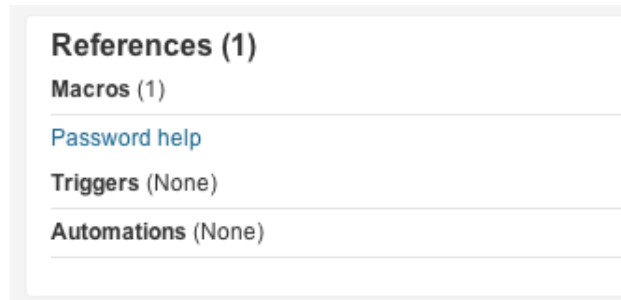
By clicking the link to the reference you can edit the business rule and remove the dynamic content placeholder. Once all the references have been removed, you can delete the dynamic content item.

Note: References are only tracked for automations, macros, and triggers. If you used a dynamic content placeholder in a system generated message such as those in **Settings > End-users**, you'll need to track their use manually. If you do delete a dynamic content item without first removing the placeholder from the system message, the content continues to be displayed to users (it is not deleted from your help desk).

To delete a dynamic content item

1. Select **Manage > Dynamic Content** and locate the item you want to delete.
2. Click **Delete**.
3. You'll be prompted to confirm that you want to delete the item. Click **OK**. If there are no references to the dynamic content, the item is deleted. If there are references, the item is not deleted. You can then remove the references and delete the item.

Deleting variants

Any of the non-default variants in a dynamic content item can be deleted at any time. References to the dynamic content placeholder do not affect the variants. To delete the default variant, you need to make another variant the default or delete the entire dynamic content item.

To delete a dynamic content variant

1. Select **Manage > Dynamic Content** and locate the item that contains the variant you want to delete.

2. Locate the variant and click **Delete**.
3. You'll be prompted to confirm that you want to delete the item. Click **OK**.

Searching your dynamic content

The content in your dynamic content variants can be searched. The dynamic content search tool is located on the **Manage > Dynamic Content** page.

You can search for any text string in any of the languages you've used in your dynamic content variants.

Managing the translation of your dynamic content

You can manage the translation of your dynamic content in the following ways:

- You can add translated content when you create the variants in the help desk. You can then manage updates to the translated content by editing the variants.
- You can create all the default help desk language versions of the dynamic content and then export them as CSV (comma separated values) files and send them out for translation. When the translations are complete you import the CSV files back into your help desk and all the language variants are added.
- You can do a combination of both these approaches; translating and editing some variants in-house and using the export/import process to create and update the language variants via a third-party translation agency.
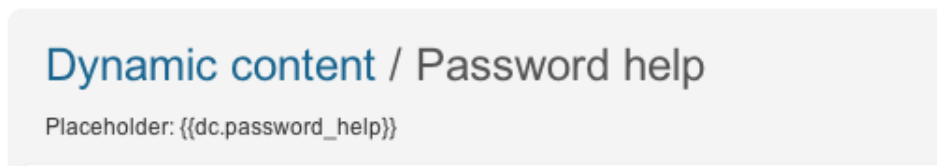
For information about exporting and importing your dynamic content, see *Exporting and importing dynamic content*.

Using your dynamic content

The dynamic part of dynamic content is that the correct version of the content is automatically shown to the end-user based on their language. As with the Zendesk placeholders (see *Zendesk data object (placeholders) reference*), to use your dynamic content you simply reference the placeholder.

Using the 'Password Help' dynamic content as an example, you can use the dynamic content by adding the placeholder into a comment in a macro.

Every dynamic content item has a corresponding placeholder (it's shown below the title of the dynamic content).

In this example, it's {{dc.password_help}}.

When the macro is applied to the ticket, the appropriate language variant text is inserted into the comment. If the end-user's language is not one of your supported languages, the default variant is used.

Dynamic content placeholders can be used in your automations, macros, and triggers.

You can also use your dynamic content for common system messages such as those used in the sign up process. For example, the text contained in the messages in **Settings > End-users** can be replaced with dynamic content placeholders.

You can use dynamic content placeholders in the following:

- Sign up messages (**Settings > End-users**)
    - User registration message
    - User welcome email
    - Email verification email
- Agent signature (**Settings > Agents**)
- Forums tab name in the Web portal (**Settings > Channels > Web portal**).
- Home page welcome message and its title (You edit the message directly on the help desk home page).

How an end-user's language is set and detected and then used when displaying dynamic content is explained in *Setting and detecting a user's language*. You can also find several examples of how to build a workflow based on language in *Using a requester's language in your business rules*.

Exporting and importing dynamic content

To streamline the translation of your dynamic content, you can easily export the content as CSV (comma separated values) files that you can send off to a translation agency and then import the translated files back into your help desk. You can do this when first creating the dynamic content and any time you need to update the content thereafter.

An excellent way to manage your dynamic content translation is to first create all the dynamic content in your help desk default language and then export the files. The export creates separate files for each of the languages you support in your help desk. Your translation agency can add all the translated content into the files and when you import the files back into your help desk the language variants will be created automatically for you. In other words, there's no need to manually create language variants in the help desk if you're sending the export files out for translation.

For information about creating and managing dynamic content, see *Using dynamic content to provide multiple language support*.

Exporting dynamic content for translation

You can quickly export all of your dynamic content into CSV files that you can send out for translation and then import back into your help desk when the translations are complete.

The export process creates separate CSV files for every language that you support in your help desk (defined in **Settings > Account > Localization**). For example, if your default help desk language is English and you also support French and German, the export generates the following three files:

- en-US.csv
- fr.csv
- de.csv

The CSV files are contained in a zip file.

To export your dynamic content

1. Select **Manage > Dynamic Content**.
2. In the **Import & Export** wizard (right side of the page), select **Export your dynamic content**.
3. Click **Export**. When the export is complete, you'll receive an email containing a link from which you can download the zip file.

   Note: You can export your dynamic content once in a 15 minute period. Additional requests to export the content within that period return results for the first request you made. After 15 minutes, the export will reflect any changes you made to the content since the first export request.

Each file contains all of your dynamic content in the default language in which you created them (in this example, English). Here's an example of the French CSV (fr.csv) file.

```
"Title","Default language","Default text","fr text","Variant status"
"Agent signature","English","The MondoCam Support Team","",""
"Welcome message","English","Welcome to MondoCam Customer Service!","",""
```

The first row of the CSV file is the header row, which contains the names of the data contained in the file: title, the default language, the default text of the dynamic content, the variant's language, and the status.

The CSV file can be opened in a text editor, a spreadsheet application such as Microsoft Excel or OpenOffice.org Calc, or imported into some other translation system so that the French translations can be added. The translators add the text in the 'fr text' column and then send the CSV file back so that you can import it into your help desk.

Note: The CSV files are exported in the UTF-8 format and you must import the files back into your help desk in the same format. Note that Microsoft Excel for Mac does not support the UTF-8 format.

```
"Title","Default language","Default text","fr text","Variant status"
"Agent signature","English","The MondoCam Support Team","Toute l'équipe du
 Support MondoCam",""
"Welcome message","English","Welcome to MondoCam Customer
 Service!","Bienvenue au support de MondoCam",""
```

The identifier for each dynamic content item is its title. When you import the file, the title is matched to the existing dynamic content item and the translations are added as language variants.

Importing the translated CSV files

After your CSV files have been translated, you can import them back into your help desk.

To import dynamic content

1. Select **Manage > Dynamic Content**.
2. In the **Import & Export** wizard (right side of the page), select **Import content**.
3. You can either choose the CSV file you want to import or paste the CSV data in directly.

   - To import a CSV file, select **Choose File**.
   - To paste in the CSV data, select **Let me paste in data instead**.
4. Click **Import**. You'll receive an email when the import is complete.

If your CSV file is properly formatted and is in the UTF-8 format, your import will be successful. If the import fails, you'll receive an email describing the errors that occurred.

While importing a CSV file is a straightforward process, there are some details about importing this content that you'll want to be aware of.

- Even though the CSV file contains the status, you cannot set the status via the import. If you manually change the status in the import CSV file, your changes will be ignored.
- If you import content for a variant that does not exist (but the language is supported in your help desk), the variant will automatically be added and its status set to Active.
- The only data that is required (in fact, the only data that is imported from the CSV file) is the title and the language text. Therefore, you can import variant translations using a CSV file in this format:

```
"Title","fr text"
"Agent signature","Toute l'équipe du Support MondoCam"
"Welcome message","Bienvenue au support de MondoCam"
```

- If the language text in a variant is blank or is just spaces (in other words, no valid text) then the variant content is not added. However, all other valid entries in the file will be added.
- If an error occurs during the import, the import will fail and you'll receive an email message with the error details.

Chapter

11

Zendesk Enterprise

Advanced ticket sharing with Zendesk Enterprise

In the standard version of ticket sharing, sharing agreements can be created between help desks and agents can manually share tickets to another help desk. In the Enterprise version of Zendesk, you can create business rules that automatically share tickets with another help desk. This is key to enabling multi-brand management (see *Setting up to manage multiple brand help desks*). However, its use is not restricted to multi-brand management. It's equally useful in simply sharing tickets with another help desk.

In addition to the ticket sharing conditions that are available in standard ticket sharing (**Ticket channel is Ticket sharing** and **Ticket update via Ticket sharing**), the Enterprise version includes an action called **Share ticket with**. Once you've established ticket sharing agreements with other help desks, you can select the name of help desk to automatically share tickets with.
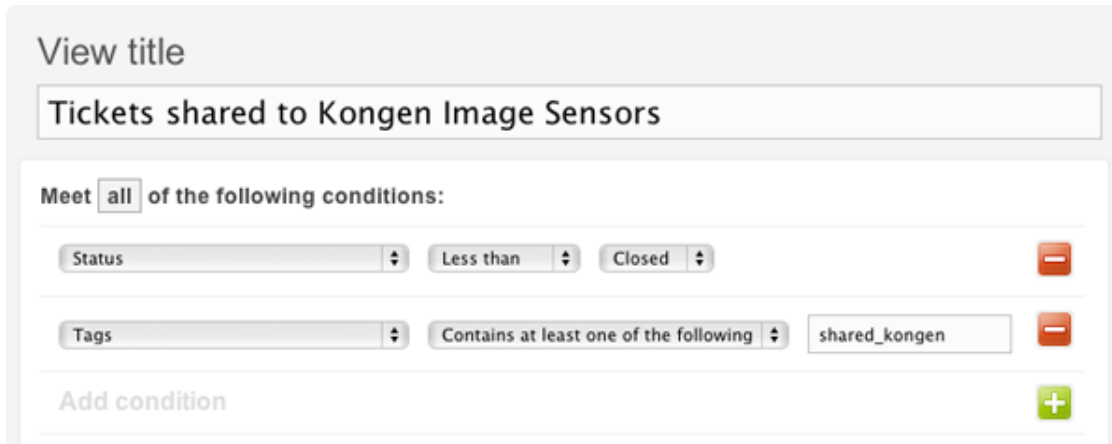
You can of course use any number of conditions as the criteria for sharing tickets with a specific help desk. In the example above, the `image_sensor` tag was added via a custom field in the support request form that prompted the end-user to select their problem type.

The actions share the tickets to the specified help desk and also add a tag that will be used in other business rules to track the shared tickets. For example, you can create views and reports that track shared tickets, as in this example:

This demonstrates the importance of also adding a tag that identifies the other help desk when sharing tickets. This of course can be done manually via a macro or in a trigger, as in the example above.

Custom agent roles

In the Enterprise version of Zendesk, you can define your own agent roles and assign those roles to any agent in your help desk. This allows you to define agent roles that suit your own organizational structure and workflow.

When creating custom agent roles, you choose from an extensive list of permissions that define what agents can do in the help desk.

Zendesk also offers a number of predefined agent roles that reflect typical enterprise support roles. You can use these agent roles as is or clone them and create variations to suit your needs. Or, you can create your own agent roles.

Agent role	Description
Legacy Agent	This is transitory role that includes all agents who have yet to be assigned to a role. For all these agents, we are maintaining the permissions they previously had on the plan you upgraded from. Also, you cannot assign agents to this transitory role. Lastly, this role will disappear after all its members have been assigned to other roles.
Light Agent	Zendesk Enterprise provides you with unlimited internal usage in the form of light agents. Light agents can be CC'd on and view tickets, add private comments to tickets within their groups, and view reports. They cannot be assigned to or edit tickets. You can add an unlimited number of light agents at no charge.
Staff	A Staff agent's primary role is to solve tickets. They can edit tickets within their groups, view reports, and add or edit personal views and macros.
Team Leader	Team leaders have greater access to the help desk than staff agents. They can read and edit all tickets, moderate forums, and create and edit end-users, groups, and organizations.
Advisor	Advisors manage the workflow and configure the help desk. They create or manage shared automations, macros, triggers, and views. They also set up the service level agreements, channels, and extensions. Advisors don't solve tickets, they can only make private comments.
Administrator	Administrators have control over everything within your help desk, except for changing billing information or payment plans (that can only be done by the account owner).

Creating agent roles

You can create your own agent roles or base a new role on one of the predefined agent roles. You can either edit or clone the Staff, Team Leader, and Advisor roles.

To create a new agent role from a predefined role

1. Select **Manage > People > Roles**.

   All of the agent roles (predefined and custom roles, if any) are displayed.

2. Locate the role you want to edit or clone. Select **Edit** or **Clone** (this command appears when you move your mouse over the role in the list of roles).
3. Define and create the agent role as described below in *Agent permissions*.
4. When you've finished defining the new role, click **Create Role**.

To add a new custom agent role

1. Select **Manage > People > Add Role**.
2. Enter a role name and description and then select the permissions for the role (described below).
3. Click **Create Role**.

Agent permissions

You create agent roles by choosing the permissions described in the following table.

Permissions	Description
Tickets	You can define an agent's access to tickets, the types of comments they can make, and their editing permissions.

An agent may access tickets in one of the following ways:

- Assigned to this agent only
- Requested by users in this agent's organization |

Permissions	Description
	• All within this agent's group(s) • All Agents can add ticket comments in one of the following ways: • Private only • Public and private In addition, you can grant agents permission to do any of the following: • Can edit ticket properties • Can delete tickets • Can merge tickets • Can edit ticket tags **Note:** In the Enterprise version, the ability to delete tickets has been moved from **Settings > Agents** and is now an agent-level permission.
Tools	The Tools section includes access and editing permissions for views, reports, and macros. One option can be selected for each. Reports: • Cannot view • Can view only • Can view, add and edit Views: • See views only • Add and edit personal views • Add and edit personal and group views • Add and edit personal, group and global views Macros: • Cannot add or edit • Can add and edit personal macros • Add and edit personal and group macros • Add and edit personal, group and global macros
People	There's one permission for viewing and editing end-user profiles. One of the following options can be selected: • View only • Add and edit within their organization • Add and edit all • Add, edit and change password for all End-user editing rights enables the agent to verify and assume end-users. Only admins can change a user's role.

Permissions	Description
Forums	Viewing and editing of forums can be set to one of the following: • Add topics in unrestricted forums only • Add and edit topics in all forums (moderator) • Add, edit and reorder all forums content All forums content includes comments, topics, forums, and categories. Selecting **Can access organization-restricted forums** allows the agent to access and edit forums restricted to an organization.
Channels	Depending on the channels that have been enabled for your account, agents may also be allowed to do any of the following: • Can answer chat requests • Can access Twitter functionality • Can answer phone calls
System	The following two options allow the agent to create and edit triggers, automations, and SLA targets and to manage channels and extensions. • Can manage business rules • Can manage channels and extensions Channels are modes of communication such as chat, email, and twitter. Extensions includes integrations and widgets.

Assigning Enterprise agent roles

You can assign a role to an agent by editing their profile or you can select more than one agent and assign them all at once. The agent roles are displayed in a drop down list in the user profile.

By selecting **Manage > People** you have the option of assigning roles to more than one user at a time.

Simply click **Change Role** and you can select the role that you want applied to the users you've chosen.
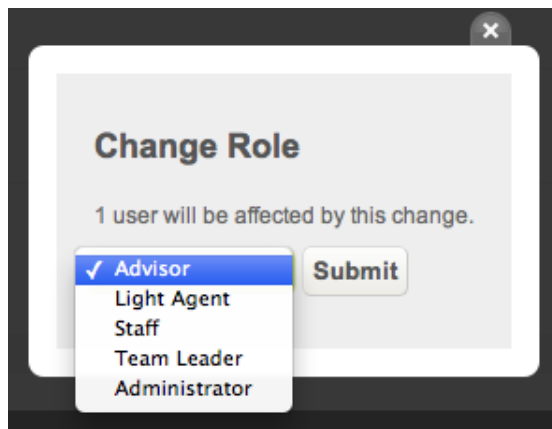
The list of roles will of course include any custom roles that you create.

Archiving email notifications

Many businesses maintain archives of their customer communications as a standard practice or for legal purposes. In the Enterprise version of Zendesk, you can enable automatic email archiving, which will send a copy of every outbound email notification to a BCC address. The BCC address is to an external email account so that the archive is maintained outside of the help desk. This can be set up by an admin.

To set up email archiving

1. Select **Settings > Tickets**.
2. In the section **Email Archiving**, enter an external email address.
3. Click **Save Tab**.

All ticket email communication will now also be sent to the BCC address for archiving.

Restricting access to your help desk

In the Enterprise version of Zendesk, access to your help desk can be restricted to specific IP addresses. This means that users from these IP addresses are the only users allowed to log in to the help desk. This includes all help desk users.

You also have the option of restricting access to just the agent login (agents must log in from the approved IP addresses), while allowing the end-user Web Portal to remain unrestricted.

With IP restrictions enabled, you can still allow your agents to log in to your help desk via the Zendesk mobile applications for Android smart phones, the Apple iPhone, and the iPad. Enabling mobile access via the Zendesk mobile applications allows agents to bypass the IP restrictions so there is some security risk involved.

An IP range is in the format n.n.n.n, where n is a number or an asterisk (*) wild card. Separate multiple IP ranges with a space.

To set IP restrictions

1. Select **Settings > Security > IP Restriction**.
2. Select **Enable**.
3. Enter the IP addresses that are allowed access to your help desk.
4. Optionally, restrict access only to the agent login, not the end-user Web portal, by selecting **Restrict only the agent portal**.
5. Optionally, allow agents to access your help desk from the Zendesk mobile apps by selecting **Enable mobile access**.
6. Click **Save Tab**.

Note: Enabling IP based access restrictions can break third party integrations. Be sure to include all external IPs that need access to your account via the Zendesk API.

Setting up to manage multiple brand help desks

In the Enterprise version of Zendesk, you can manage support for multiple brands by linking separate branded help desks to a central help desk. Support requests are received by the branded help desks and are automatically shared to the central help desk, which contains the support agents who resolve the requests. One team of agents supports all of your brands.

To ensure a seamless, branded experience for your end-users, all outbound communication is routed back through the branded help desks and end-users are never aware that their requests have been handled by the central help desk.

Linking between the branded help desks and the central help desk is made possible using *ticket sharing*. Sharing agreements are established between the branded help desks (the senders) and the central help desk (the receiver) and support requests become tickets that are resolved by the central help desk, as shown here:
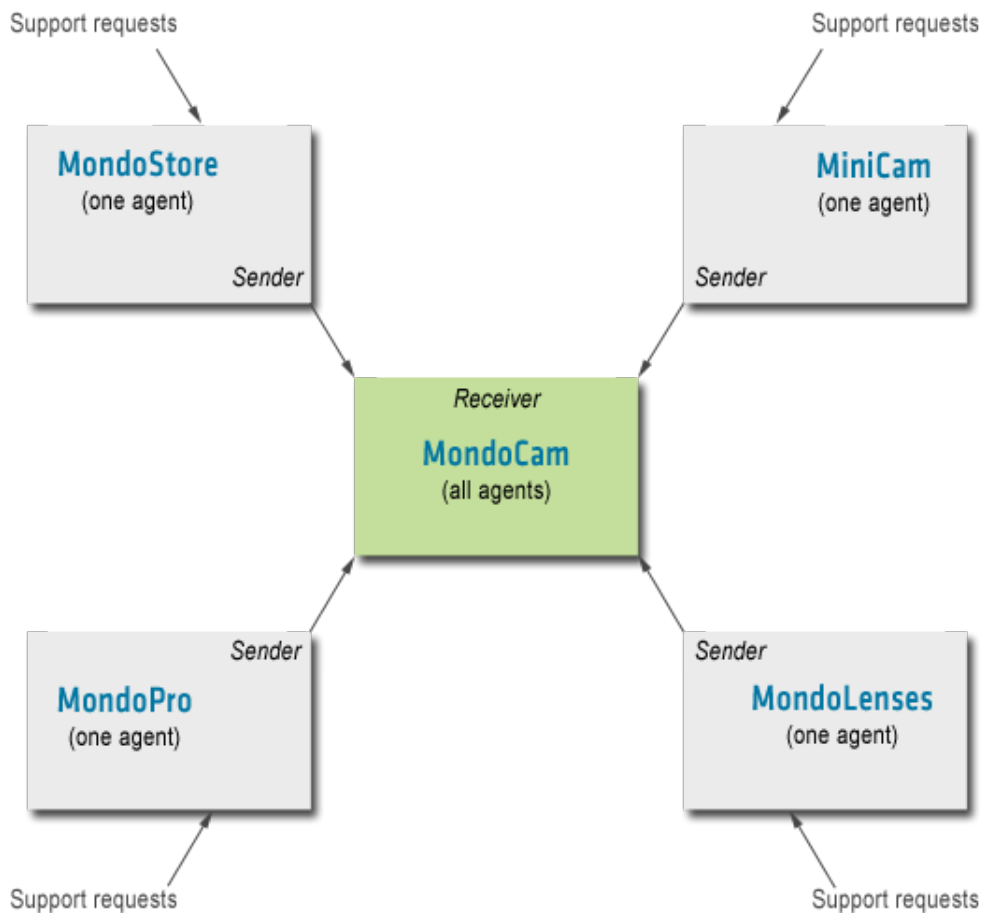
Each of the branded help desks require at least one agent with admin permissions (this can also be the account owner) who can set up the sharing workflow with the central help desk and customize the look of the branded help desks.

Once set up, the ticket workflow is managed automatically because the ticket status is synced between the branded and central help desks (ticket sharing creates a synced copy of the ticket in the central help desk). When the ticket status is set to solved by agents in the central help desk, it is updated in the branded help desk as well. Tickets are then closed within the branded help desk using an automation (for example, using the default Zendesk automation called **Close ticket 4 days after status is set to solved**).

All ticket activity is managed in the central help desk. However, all user and forum management is done in the branded help desks. For more information, see *How the user experience and workflow are affected* below.

You can add as many branded help desks as you need.

Linking branded help desks to the central help desk is done in a series of easy steps, as follows:

1. *Step 1: Contact Zendesk to set up help desk accounts*
2. *Step 2: Set up the ticket sharing agreements*
3. *Step 3: Create the ticket sharing triggers for each branded help desk*
4. *Step 4: Disable business rules in the branded help desk that notify agents*
5. *Step 5: Create business rules for tracking and managing shared tickets*

Step 1: Contact Zendesk to set up help desk accounts

To begin, determine how many branded help desks you need and then contact a Zendesk representative to help you create those accounts. You need to select one of the accounts as the central help desk.

If you already have a help desk and have added your agents to it and you want to expand it to include branded help desks, you can of course use your existing help desk as the central help desk. You'll also need to sign up for or upgrade to the Enterprise version of Zendesk.

To set up your help desk accounts and enable the Enterprise version

- **New customers or Non-Enterprise customers:** Contact our sales team if you're interested in upgrading to the Enterprise plan. They will help you through the buying and account setup process. You can contact them via this form: *http://www.zendesk.com/company/contact*. Explain that you're interested in Enterprise and they will handle the rest.
- **Existing Enterprise customers:** If you'd like some help getting started, or have any questions that are not answered in this document, send email to support@zendesk.com. Our support team will provide all the help you need.

Step 2: Set up the ticket sharing agreements

After you've set up your accounts, you create ticket sharing agreements. The agreements share tickets from the branded help desks to the central help desk.

To create sharing agreements

1. Log in to each of your branded help desks, one at a time, as an admin.
2. Select **Settings > Tickets > Ticket Sharing** to create the sharing agreement. (This is documented in more detail in *Setting up a ticket sharing agreement*).

Note: We recommend allowing both public and private comments and the syncing of ticket tags.

3. Log in to the central help desk and accept the agreements (Select **Tickets > Ticket Sharing**). All of the sharing agreement requests can be reviewed and accepted.

Step 3: Create the ticket sharing triggers for each branded help desk

You now need to set up the workflow that automatically shares to the central help desk all tickets received by the branded help desks. To do this, you create a trigger for each branded help desk.

To create the ticket sharing trigger

1. Log in to each of your branded help desks, one at a time, as an admin.
2. Select **Manage > Triggers and mail notifications**.
3. Select **Add Trigger**.
4. Enter a title for the trigger (for example: *Share tickets with central help desk*).
5. Add the following condition:

    • **Ticket is Created**

6. Add the following two actions:

    • **Share ticket with** [your central help desk name].
    • **Add tags** [enter a tag that identifies the branded help desk]

    Note: By adding a tag that identifies the branded help desk, you can route tickets as needed in the central help desk and also use it to keep track of where tickets originated.

7. Save the trigger by clicking **Create**.

Your trigger should look something like this:

Step 4: Disable business rules in the branded help desk that notify agents

You also need to deactivate any business rules (automations or triggers) in the branded held desk that notify agents when a ticket is created or updated. For example, if you're using the Zendesk default triggers, you need to deactivate all of these:

- Notify assignee of comment update
- Notify assignee of assignment
- Notify assignee of reopened ticket
- Notify group of assignment
- Notify all agents of received request

You need to do this so that the branded help desk agents do not receive notifications. Only the agents in the central help desk should receive notifications; therefore, all ticket activity notifications will come from the central help desk.

Even though you may not explicitly assign an agent to a ticket in the branded help desk, one is automatically assigned because it's a required ticket field. Once it's received in the central help desk, an agent is assigned based on the business rules in that help desk.

To deactivate a trigger

1. Select **Manage > Triggers and mail notifications**.

2. Locate the trigger you want to deactivate and select **Deactivate**. This command appears when you move your mouse over the trigger in the list of triggers. The trigger is deactivated and displayed in the list of inactive triggers.

Step 5: Create business rules for tracking and managing shared tickets

This step is optional, but you'll probably want to create business rules in the central help desk to control the workflow and track tickets received from the branded help desks.

As described in *Referring to shared tickets in business rules*, you can create business rules that include tickets that you've received via ticket sharing. The following conditions are available for that purpose: **Ticket channel is Ticket sharing** and **Ticket update via Ticket sharing**.

With these ticket sharing conditions, you can create views in the central help desk to, for example, track all of the tickets that have been received from the branded help desks. To track the specific help desk where the shared tickets originated, you can use tags to identify each branded help desk.

You can create a view, or report, like this for each of the branded help desks.

Note: Don't forget that you need to have included the branded help desk tags in the sharing triggers you created (described above in *Creating the ticket sharing trigger for each branded help desk*).

You can also use the branded help desk tags to route tickets through your workflow. For example, if a specific support group should be assigned to tickets from a specific branded help desk, you can create a trigger in the central help desk to automatically assign those tickets to that group. Here's an example of what that might look like:

How the user experience and workflow are affected

Because of the multiple accounts involved in managing branded help desks, some help desk features function differently than they do in a stand-alone help desk.

- All user management is done in the branded help desks since your users are added to those accounts. No user data is synced to the central help desk. The central help desk is aware of the users as ticket requesters but they are not added to the central help desk's user database. Adding and editing your user base is done separately in each branded help desk account.
- Forums and knowledge bases are created and managed in the separate branded help desks. Since you're supporting multiple brands you probably have content and user issues that are unique to each. Forum moderation is also done separately for each branded help desk.
- Chat works a little differently when managing multiple brands and requires that chats originate from the central help desk. For more information, see *Using Chat when managing multiple brand help desks*.
- Customer satisfaction ratings in branded help desks are not quite as detailed as in a single account implementation. In the branded help desks, you can track the overall satisfaction rating. For more information, see *Tracking customer satisfaction ratings when managing multiple brand help desks*.

Analyzing your business rules

In the Enterprise version of Zendesk, you can analyze how your business rules affect your help desk workflow. For example, suppose that you'd like to understand how a particular group or agent is being assigned tickets or you want to optimize how tags are used across the help desk so you'd like to see how they're currently being used. Rather than manually inspecting each business rule to assess their downstream effects on the workflow, Zendesk provides you with a tool for inspecting what can be a complex web of interactions.

You might use business rules analysis for the following situations:

- To locate the business rules that assign tickets to a specific agent. This can be helpful when an agent leaves for example.
- To find out why a specific agent or group is being assigned an unusual amount of tickets.
- To evaluate what business rules will be affected if you make changes to your custom fields.
- To update your business rules to reflect organizational changes you've made. Perhaps you've restructured and added or removed groups and responsibility for specific areas of support have changed.
- To track and make changes to how tags are being used throughout your help desk.

Business rules analysis begins by summarizing how the following help desk ticket properties are used in business rules:

- Group assignment
- Agent assignment
- Organization
- Channel
- Request received at email
- Macro reference
- Email user
- Email group
- Notify target
- Tag

You access rules analysis from the business rules pages. For example, select **Manage > Triggers and mail notifications** and then select **Property analysis for triggers, automations, views and macros**.

Only those ticket properties that are actively being used in business rules are displayed.

You can view the detail for each property value and analyze how they are being used in triggers, automations, macros, and views.

In this example, triggers that reference (as a condition) or set (as an action) the Level 1 support group are displayed. You can select to show active (which is the default) or inactive business rules.

From here you can review and edit the business rule by clicking **Edit**. You can also clone or deactivate the business rule.

Chapter

12

CSS Cookbook

How to customize the help desk using CSS

If you want your help desk to more closely match the look of your company's web site, you can modify the default elements and styles using CSS (cascading style sheets) code. This is easier to do if you're already familiar with CSS, but it's possible if you're not. Zendesk allows you to modify your help desk using CSS widgets, which can be added by an admin.

If you're not familiar with CSS, you may want to spend a little time learning about it first. However, if you have some knowledge of HTML, it shouldn't be difficult for you to understand the purpose and use of CSS. At it's simplest, it's a tool for applying style definitions to elements of an HTML page. You use it to set background and text colors; add, remove, or style borders; set the sizes and control placement of elements on a page, and so on.

A typical CSS statement refers to a page element and then sets properties that affect that element.

```
#footer {
 width:1000px;
    background-color:#333333;
}
```

The properties are contained within curly brackets and each property setting is terminated with a semi-colon. The code above is formatted for easy readability but it could also have been written like this:

```
#footer {width:1000px;background-color:#333333;}
```

When you're setting lots of properties, breaking code statements to multiple lines is much more readable.

The properties that can be modified depend on the type of element. For example, there are properties for positioning tables and other containers and properties for formatting text. Refer to the *W3C CSS Reference* for a complete list of CSS properties.

You can use the customization examples contained in the *CSS Cookbook* as the basis for your design and not worry too much about the underlying low-level detail. You might just change colors of text and backgrounds or shift an element to be aligned center rather than to the right. If you want to know more about the page elements and how they've been styled with CSS, you can use browser tools to inspect the structure of a web page. See *Inspecting the help desk page elements* below.

Note: There is no guarantee that page elements won't change in the future. However, these changes are infrequent and you'll be notified before they're made so that you can update your code.

Adding a global CSS widget

To get started customizing your help desk, you need to add a Global CSS widget. Only admins can add widgets to the help desk.

To add a CSS widget

1. Select **Settings > Extensions > Add widget**.
2. Locate and click the **Global CSS widget**.
3. Enter a name for the widget.
4. Select one of the following availability options:

- Anyone, including people who have not logged in
- People who have logged in
- People who have logged in and is an end-user
- People who have logged in and is an agent
- People who are not an agent

    In most cases, you'll want to select **Anyone** so that all your users see the changes. There are occasions when making changes just for end-users or agents is helpful.

5. Enter CSS code for the elements of the help desk you want to customize.
6. Save your widget by clicking **Submit**.

When you create a CSS widget it is automatically activated and the updates you make to it are immediately applied to the help desk. As you're creating your CSS code you may want to use more than one CSS widget and break the customization code into chunks so that you can test different parts of your customization separately. When you've completed the customization you can always pull all of the CSS code into one of the CSS widgets and then activate just that one.

Some customizations may also require JavaScript code, which is typically used to insert content into the page. For example, if you wanted to add links to your company's web site into the footer, you'd use a combination of JavaScript and CSS. Adding a JavaScript widget is similar to adding a CSS widget. Just follow the steps above to add a widget and select **Global JavaScript**.

Inspecting the help desk page elements

The examples in the topics contained in the *CSS Cookbook* provide you with easily reusable code that you modify to your own design. These examples also help you to identify by name the page elements that you are modifying. For example, the header is contained in a div called `header`. Once you know how the page is structured, the names of its elements, and what each element contains, you can apply your CSS skills to modify the default design.

Most modern web browsers provide tools for you to inspect the structure of a web page. For example, if you're using Mozilla Firefox there is an add-on called Firebug that does just that. Some browsers, like Google Chrome, have these tools built in.

Here's an example of using the Developer Tools in Chrome to inspect the page elements.
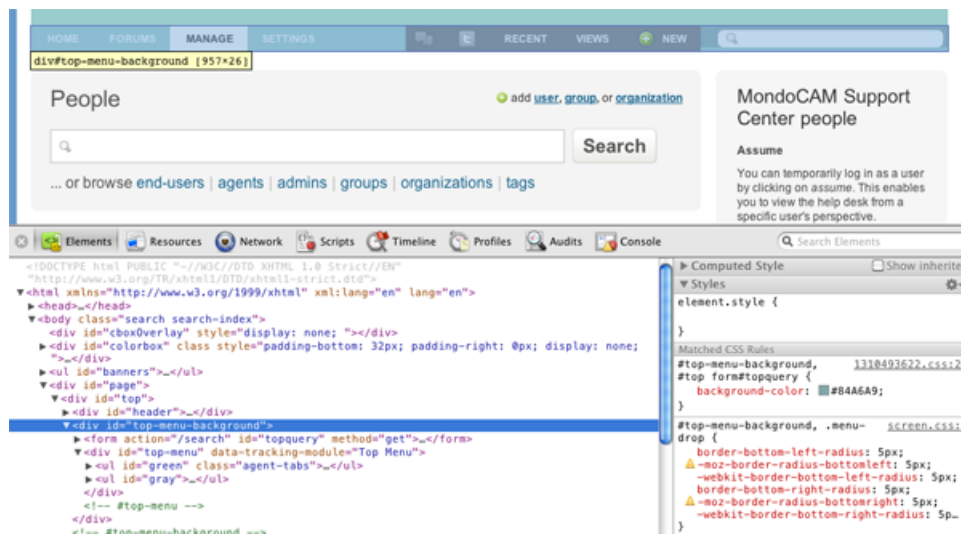
As you select elements of the code, the corresponding section of the user interface is highlighted. In this example, the top menu background is selected. You can also see that this tool displays the underlying CSS so that you can see exactly how an element has been formatted. Taking these CSS style definitions as a starting point, you can modify to look of the help desk to match your company's branding.

Next steps

The CSS customization examples in the *CSS Cookbook* describe a number of typical customizations. Add a CSS widget to your help desk and try out some of the code to get started.

# Setting the page width and removing the page border

By default, the Zendesk layout resizes with the browser window. You can set a specific page width if you'd like.

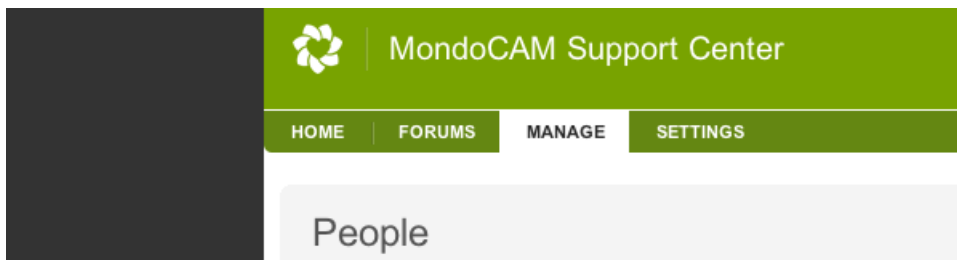This example describes how to do the following CSS customizations:

- Set the page to a specific width
- Remove the white margin next to the header
- Set the footer width to match the page width

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before
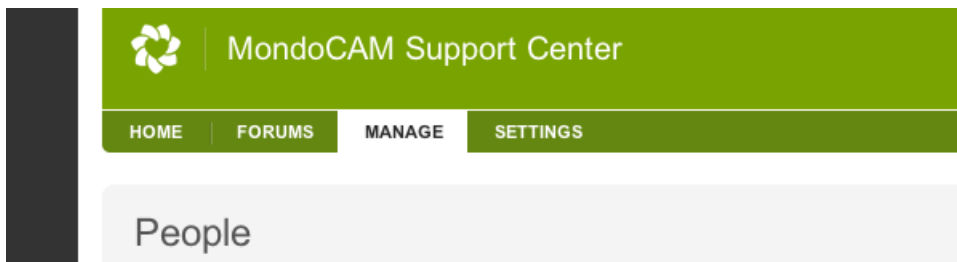
After

The background border has increased because the page size was reduced. The width of the background border varies depending on the size of the browser window.

CSS code

The following code sets the width of the page, removes the white border next to the header, and then adds a border to the content container.

```
/* Set the width of the page */
/* If you want to constrain it
 * to a specific size. */
#page {
 margin: 0 auto;
 width: 1000px;
 max-width: 1000px;
 min-width: 1000px;
 position:relative;
 right: 2px;
```

```
 /* These two settings remove the white border next to the header. */
 padding-left:0px;
 padding-right:0px;
}

/* Set the minimum width of the frame */
.frame {
 min-width: 510px;
}

/* Add a border within the content container
 * to compensate for taking it away
 * in #page. */
div#container {
 padding-left:10px;
 padding-right:10px;
}
```

Note: You should be careful when setting the page width because if you make it too small elements of the page will overlap (sidebar over the content container, for example).

The page header is contained within the page element, but the footer is not. So, if you change the page width, you also need to change the width of the footer to match.

```
/* Set the footer width to match the page width */
#footer {
  margin: 0 auto;
  width: 1000px;
  max-width: 1000px;
  min-width: 1000px;
  }
```

For more information about customizing the footer, see *Customizing the page footer*.

Replacing the header logo and title

Using the branding tools in Zendesk (**Settings > Account > Branding**) you can easily change the help desk title and replace the Zendesk logo with your own logo. If you want more flexibility with the size of your logo and branding, you can hide the Zendesk logo and the title of the help desk and format the header area to suit your needs.

This example describes how to do the following:

- Hide the Zendesk logo, the help desk title text, and the separator bar
- Increase the width of the header
- Insert a logo into the header
- Change the font color of the links in the upper right corner of the header
- Create a new div element to add a link to the logo

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before
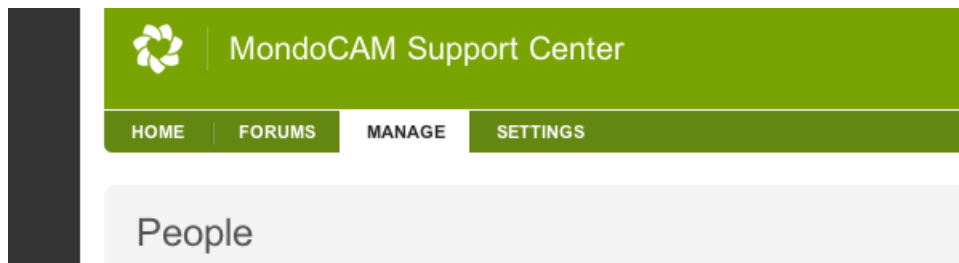
After
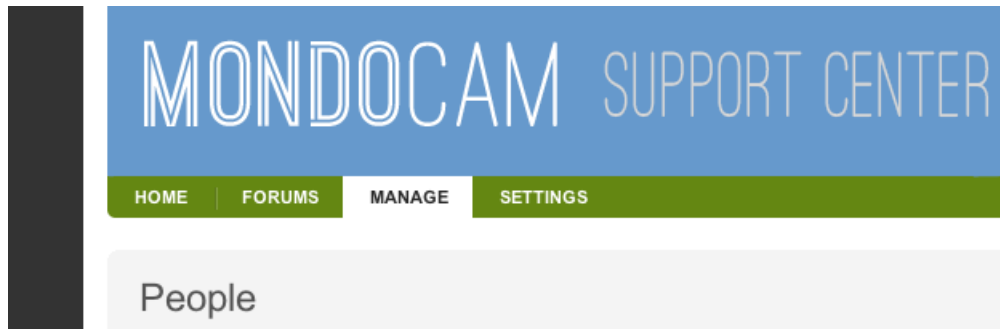
CSS code

The following code hides the Zendesk logo and the help desk account title, increases the height of the header, and also shows how to change the font color of the links in the upper right corner (useful if you need it to contrast with the background color of your logo).

Note: In the after example above, the logo was created with a transparent background. The background color of the logo is set in the header (as shown below): `background-color:#6699CC;`.

Hide the Zendesk logo and help desk title text

```
/* Hide the Zendesk logo and help desk title text */
#table_header {
 display: none;
}
```

Increase the size of the header, add a logo, set the background color

```
/* Increase the size of the header, add a logo, set background color */
#header {
 height: 100px;
 background-image: url(http://LOCATION OF YOUR LOGO.com/your_logo.png);
 background-repeat: no-repeat;
 background-position: top left;
 background-repeat: no-repeat;
 background-color:#6699CC; /* blue */
}

/* Setting the #top background color removes the
 1 px white line above the menu bar */
#top {
    background:#6699CC; /* blue */
}
```

Set the text properties of the links in the upper-right corner of the header

```
/* Set the text properties of links in top-right
 * User name, profile, help, login/logout */
#top-right, #top-right a, #top-right p {
    color:#FFFFFF; /* white */
    font-size:12px;
    font-weight:normal;
    margin:25px 0 0;
    text-shadow:0 2px 3px rgba(0, 0, 0, 0.5); /* This may not work with all
 browsers */
}

/* Change the hyperlink hover color of links in top-right */
#top-right a:hover {
 color:#FFA640; /* orange */
}
```

Adding a link to your logo

If you also want to add a link to the help desk home or your web site from the logo, you need to add some additional CSS code and also a simple JavaScript widget.

First add the JavaScript widget, which inserts a div element into the page that will overlay the logo and contains the `href` element to create the link.

```
Event.observe(window, 'load', function() {
 $$('#header')[0].insert(' <div id="header2"><a href="http://mondocam.zendesk.com/
home"><span> </span></a></div>'); });
```

Here's the additional CSS code to add. It sets the size of the div called 'header 2' that was added to the page with the JavaScript code. The height and width properties need to match the height and width of your logo.

```
/* Set properties of new div for logo link */
/* Inserted via JS Widget */
/* Must match the H and W of the logo image */
#header2 a {
 display: block;
 height: 100px;
 width: 594px;
 position: relative;
 top: 0px;
 left: 0px
}

#header2 a span {
 visibility: hidden;
}
```

Customizing the page footer

The footer is a separate element on the page called `#footer` so if you make changes to the page layout (such as resizing the page) and want the footer to match, you'll need to set its properties as well. And, as with all text elements you can also change the alignment and formatting of the text. You may also completely hide the footer.

This example describes how to do the following:

- Center the footer text
- Change the footer text color
- Change the color of the hyperlink text and hover
- Add a drop shadow to the footer text
- Hide the footer

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before
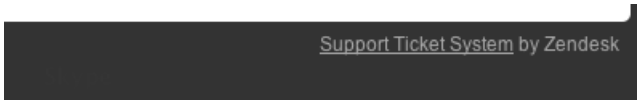
By default, the footer text is aligned right.

After

The text is aligned to the center and the background color and font properties have been changed.

CSS code

In this code example, the text is centered, the text color is modified, and a drop shadow is added.

```
/* Set the footer width */
#footer {
 margin: 0 auto;
 width: 1000px;
 max-width: 1000px;
 min-width: 1000px;
}

/* Set the footer text color */
#footer, #footer p {
 color: #333333; /* dark gray */
}

/* Set the footer hyperlink to a different color */
#footer a {
 color: #FFFFFF; /* white */
}
```

```
/* Set the footer hyperlink hover to a different color */
#footer a:hover {
 color: #FFCC99; /* light orange */
}

/* Center the footer text and add a drop shadow */
#footer p {
 text-align: center;
 color:#333333;
 margin:25px 0 0;
 text-shadow:0 2px 3px rgba(0, 0, 0, 0.5); /* This may not work with all browsers
 */
}
```

In this example, the background color of the footer is transparent, which is the default, and picks up its color from the page background. To set the page background color in CSS, you can use this code:

```
/* Set the background color of the site.
* This is equivalent to setting Settings > Account > Page Background */
html, body {
 background-color:#6699CC; /* blue */
}
```

If you want to set the background color of the footer (separate from the page background) you can add this CSS code:

```
#footer {
 background-color:#FF8800; /* orange */
}
```

These are just a few examples of how you can format the footer. You could also, for example, increase the height of footer and change the background to another color or and an image. Using JavaScript you can also insert more links into the footer.

Hiding the footer

To completely hide the footer, use this CSS code:

```
/* Hide the footer */
#footer {
 visibility: hidden;
}
```

Customizing the top menu bar

The top menu bar consists of the primary navigation for the help desk, a number of links for accessing frequently used actions such as opening a chat window, checking your views, and creating new tickets, and also the global help desk search. All of these elements can be customized with CSS.

The top menu bar consists of four primary elements:

- The menu bar background
- The main navigation for agents (the Home, Forums, Manage, and Settings menus) and end-users (Home, Forums, Submit a request, Check your existing requests)
- The quick menu bar for agents (the Chat, Twitter, Recent, Views, and New menus)
- The global help desk search

Compared to the other CSS examples in the Cookbook, the top menu bar is complex. If you want a better understanding of how it's structured, see *Anatomy of the menu bar* before reviewing the CSS code examples. If you're not interested in how it's built, you can follow the code examples below (*CSS code*) and simply plug in your colors.

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Anatomy of the menu bar

The topmost container for the menu bar is a div called `#top-menu-background`.

The `#top-menu-background` div contains the help desk search, which is called `#topquery`.

Nested within `#top-menu-background` is a div called `#top-menu` that contains the two sets of agent menus. On the left side of the menu bar, a div called `#green` contains the main agent navigation.


The other set of menus is contained in a div called `#gray`.


The naming convention here corresponds to the default Zendesk color scheme.

All of these elements, with the exception of `#gray`, are interrelated in that to successfully customize the top menu bar and the drop down menus you need to change various style settings to each of them. The `#gray` div essentially sits on top of the menu bar and is therefore self-contained and is customized separately. Customizing the `#gray` menu will be described in a separate article.

Before
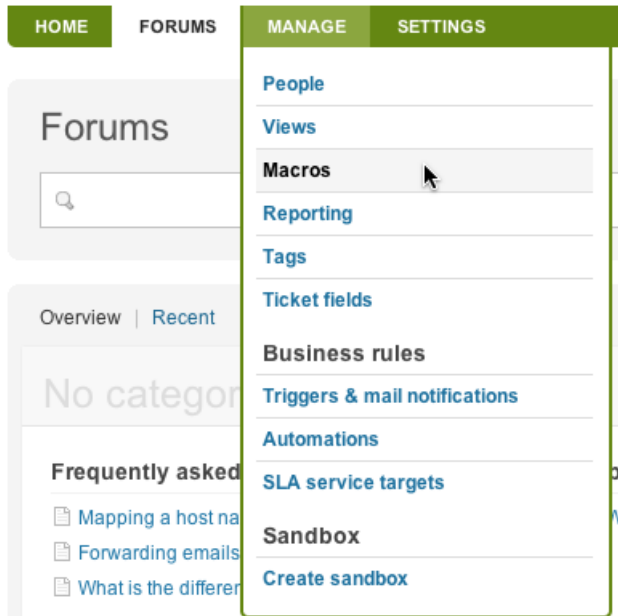
After
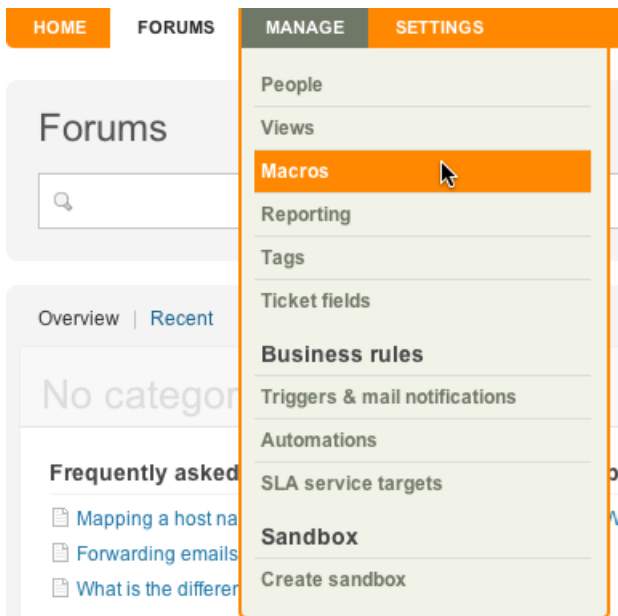
CSS code

Menus consist of many parts and there are many different states for some of those parts (active, inactive, hover, etc). Restyling menus can be very difficult. To make it simpler, you can ignore the structural complexity and just replace the color settings in the following CSS code with the colors of your palette.

```
/*** Code for formatting the top menu background, borders, and menu tabs ***/

/* Set the background color of the top menu bar */
#top-menu-background, #top form#topquery {
    background-color: #FF8800; /* orange */
}

/* Set the left border color of the tabs to the same color as the background */
ul#green.agent-tabs li.main {
    border-left: 2px solid #FF8800; /* orange */
}

/* This code controls the positioning of the menu tabs.
*  No need to change anything here - just be sure to include it. */
ul#green.agent-tabs li.tab_home.first, ul#green.agent-tabs
 li.tab_home.first:hover, ul#green.agent-tabs li.tab_forums, ul#green.agent-tabs
 li.tab_forums:hover {
    border-left: 0!important;
    padding-left: 0!important;
}

/* Set the hover background color for the inactive (unselected) tabs */
ul#green.agent-tabs li.main:hover, ul#green.agent-tabs li.over, ul#green
 li.main:hover {
    background:#6F7866; /* gray */
}

/* Set the hover background color for the active (selected) tab */
ul#green.agent-tabs li.active:hover, ul#green.agent-tabs li.active.over {
    border-left: 2px solid #FF8800; /* orange */
    background:#6F7866; /* gray */
}

/*** Code for formatting the drop down menus (Manage and Settings) ***/

/* Set the drop down menu section labels (Business Rules and Sandbox) */
#green li.drop-header {
 color:#464646; /* dark gray */
 background-color: #F1F2E8; /* tan */
}

/* Set the drop-down menu background and border color */
#green ul.menu-drop {
 border-color:#FF8800; /* orange */
 background-color: #F1F2E8; /* tan */
}

/* Set the drop-down menu list item text and background color  */
#green ul.menu-drop li a {
 background-color: #F1F2E8; /* tan */
 color: #6F7866; /* gray */
}

/* Set the drop-down menu list item text and background hover color */
#green ul.menu-drop li a:hover {
 color: #FFFFFF; /* white */
 background-color: #FF8800;  /* orange */
}
```
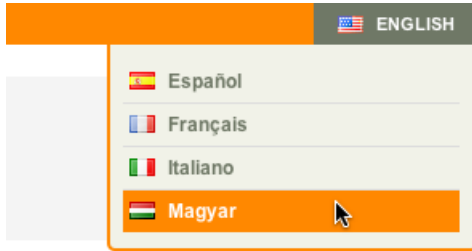
This code also formats the menus in the end-user Web portal (Home, Forums, Submit a request, Check your existing requests) and the language selection drop down menu.

Changing the content area background color

Most of the content is contained within an element called `content_grey`. A second container, `content_green`, is used for the home page welcome message (shown in the 'after' example with a yellow background), for the comments section on the ticket page, and in several other places in the help desk.

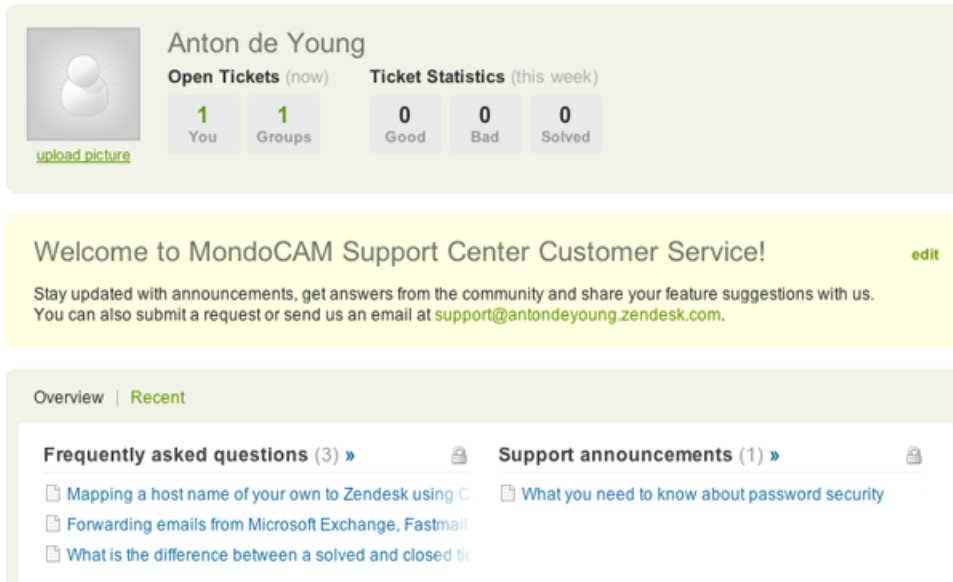This example describes how to do the following CSS customizations:

- Set the background colors for the container elements of the main content area

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before

After

CSS code

This example sets the background color of `content_gray` to a light tan and then restores the rounded corners on the left side of the container.

```
/* Set the content area background
* and section divider */
.content_grey, div.setting-divider {
 background: #F1F2E8; /* tan */
}

/* To restore the rounded top corner on the left side */
.grey_box_top {
background: #F1F2E8 url(/images/composite.gif?1284747712) no-repeat scroll;
}

/* To restore the rounded bottom corner bottom on the left side */
.grey_box_bottom {
background: #F1F2E8 url(/images/composite.gif?1284747712) no-repeat scroll 0
 -10px;
}
```

Setting the background color for content_green

In this example, the background color for `content_green` is set to yellow to match the background color of the sidebar content in our other CSS examples (see *Customizing the sidebar*) .

```
/* Set the background color for content_green */
.content_green, .green_box_top, .green_box_bottom {
 background: #FFFFE1; /* pale yellow */
}
```

Changing the font settings of the main content area

The content area is the container for most of the data in the help desk. This example describes how to do the following CSS customizations:

- Set the active link font color
- Set the font color of the Edit and Action commands
- Set the font size and color of heading fonts of the main content area containers

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.
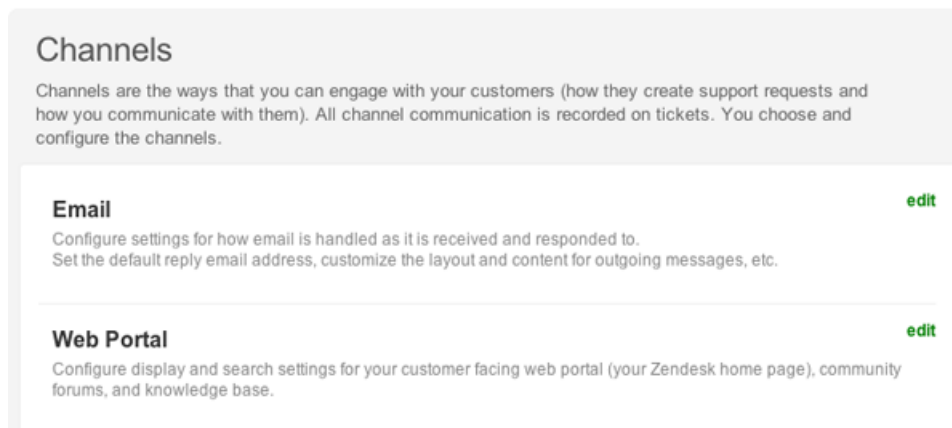
Before

After

The heading fonts color has been changed to orange (to show contrast to the before version), as well as the heading font size and weight. The **Edit** command (and all hyperlinks) has also been changed to green.
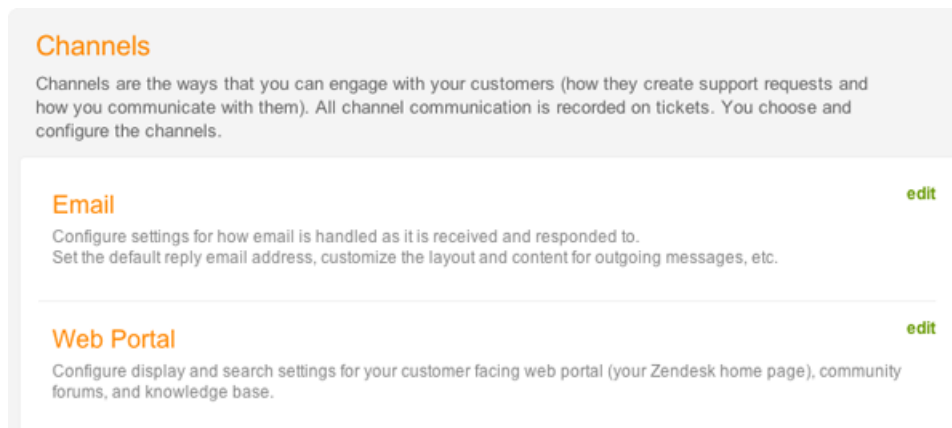
CSS code

This example sets all the active links to green and the heading fonts to orange.

```
/* Set the default content hyperlink color */
.content a {
 color: #669900; /* green */
}

/* Set the font color of the Edit link */
.content a.edit_this, #search-result a.edit_this {
 color: #669900; /* green */
}

/* Set the font color of the Action link */
.category-top-right .edit_this, .floating_menu_ui .floating_menu_action {
 color: #669900; /* green */
}

/* Sets the font color of misc links */
span.link, p.link {
 color: #669900; /* green */
}

/* Set h2 heading size and color */
.content h2, .content h2 a {
 font-size: 20px;
 color:#FF8800; /* orange */
}

/* Set h2 heading hover size and color */
.content h2 a:hover {
 font-size: 20px;
 color:#669900; /* green */
 text-decoration:underline;
}

/* Set the h3 heading font color */
.frame h3 {
    font-size: 18px;
    color: #FF8800; /* orange */
    font-weight: normal;
}
```
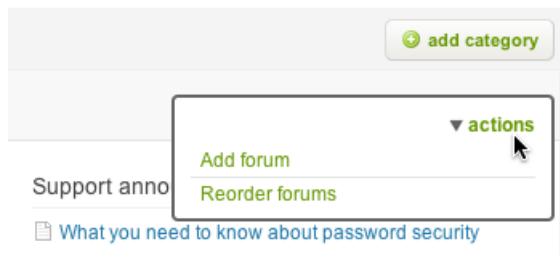
The **Edit** command is shown in the 'after' image above, the **Action** command is not. The **Action** command is used on a number of different pages in the help desk. Here's an example of the **Action** command in the forums:
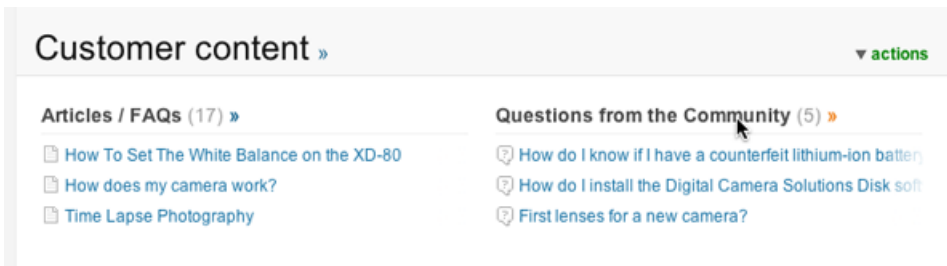
Formatting the forum content headings

The content in the forums is formatted separately from the main content area. This example describes how to do the following CSS customizations:
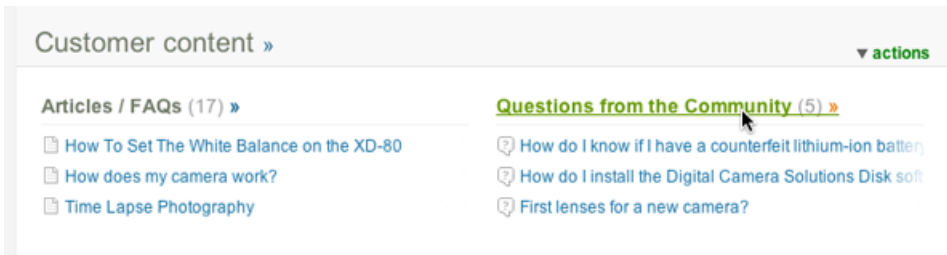
- Set the font size and color for heading 2 and 3 in the forums
- Set the font hover color for hyperlinks and add an underline

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before

After

CSS code

This code sets font properties for headings 2 and 3 in the forums. Heading 2 is used for categories and heading 3 is used for forum titles.

```
/* Set the formatting for .frame.colums */
/* This is the container for forums */

/* Set category heading size and color */
.content .frame.columns h2, .content .frame.columns h2 a {
  font-size: 20px;
  color:#6F7866; /* gray */
}

/* Set category heading hover size and color */
.content .frame.columns h2 a:hover {
  font-size: 20px;
  color:#669900; /* green */
  text-decoration:underline;
}
```

```css
/* Set the font color of h3 active links */
.content .frame.columns h3, .content .frame.columns h3 a {
  color: #6F7866; /* gray */
}

/* Set the font hover color of h3 active links */
.content .frame.columns h3 a:hover {
  color: #669900; /* green */
  text-decoration:underline;
}
```

Customizing the tickets table

The tickets table is called `table.tickets` and this example describes how to do the following CSS customizations:

- Set the background color of the table header row, the alternating shaded rows, and the 'group by' rows
- Set the hover background and font color for the active table row

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before

Active row hover:

After

Organization	Score	Subject	Requester	Requested	Type	Priority	
Status New							
-		Batterie contrefaite	Simon Jolibois	Jun-14	-	-	☐
-		Balance des blancs	Simon Jolibois	Jun-14	-	-	☐
-		Ma commande	Simon Jolibois	Jun-14	-	-	☐
-		Affordable Link Building Services	Tord Sand	Jun-11	-	-	☐
-		My Camera battery won't hold a charge	Sara Briscoe	Jun-08	-	-	☐
Harvard		Please help me	Mary Jones	May-19	-	-	☐
Status Open							
-	▢	How do I know if I have a counterfeit lithium-ion	Steven Yan	10:15	-	-	☐
-	▢	I dropped my camera in the water,what should I do?	John M Chou	Aug-04	Problem	High	☐
-	▢	My camera's battery won't charge, what should I do?	Orange Juice	Aug-04	Question	Normal	☐

Active row hover:

Organization	Score	Subject
Status New		
-		Batterie contrefaite
-		Balance des blancs

CSS code

This example changes the background and border colors of the elements in the table.

```
/* Set the header row background color of the tickets table */
table.tickets thead th {
 background-color:#F1F2E8; /* tan */
}

/* Set the font color and background color of the active row */
table.tickets tr.linked:hover > td, table.tickets tr.linked:active > td {
    background-color:#FFCD72; /* light orange */
}

/* Set the background color of the alternating shaded table rows */
table.tickets tr.linked:nth-child(2n+1) {
    background-color: #F1F2E8; /* tan */
}

/* Set the background color of the table 'group by' rows */
table.tickets tr.group_by td {
    background-color: #F1F2E8; /* tan */
    border-bottom: 2px solid #F1F2E8; /* tan */
}

/* Set the color of the bottom border of the table rows */
table.tickets td {
    border-bottom: 1px solid #F1F2E8; /* tan */
}
```

Customizing the sidebar

The sidebar contains tips on using features of the page (what we call the Help widget), links to related features, and any other widgets you add to your pages.

This example describes how to do the following CSS customizations:

- Set the background color of the sidebar
- Set the font color of the body text
- Set the hyperlink color
- Set the font color of the heading

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before

After

MondoCAM Support Center people

Assume

You can temporarily log in as a user by clicking on *assume*. This enables you to view the help desk from a specific user's perspective.

You can also assume an
anonymous user

Bulk import

Need to import a lot of existing users or organizations?

⊚ Bulk user import

⊚ Bulk organization import

Alternatively, you can import using the Zendesk API.

CSS code

The code in this example sets the background color and text properties of all elements in the sidebar.

```
/* Set the background color of the sidebar */
.side-box-content, .blue_box_top, .blue_box_bottom, .side-box-with-image, .r_blue
 {
 background-color: #FFFFE1; /* pale yellow */
}

/* Set the body text font color */
.side-box-content, .side-box-content .user_formatted {
 color: #333333; /* dark gray */
}

/* Set hyperlink font color */
.side-box-content a, #sidebar .widget a, #widget_manager_widget a {
 color: #669900; /* green */
}

/* Set heading (h3) font color */
.side-box-content h3, #sidebar .widget h3, #widget_manager_widget h3 {
 color:#FF8800; /* orange * /
}
```

This code also applies to the widget manager:

Add a widget

Please select the widget you want to add to
this page:

○ Hot topics

○ ...or create new widget

Done

Customizing the alert message bar

The container for help desk alerts and update and error messages is a div section called `#flash`. This example describes how to format the message bar using the following CSS customizations:

- Set the background and border color of the message bar
- Set the font color and size
- Set the hyperlink font color

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before
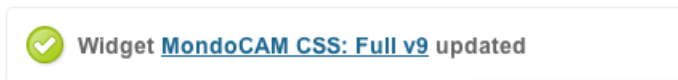
After

CSS code

Within the `#flash` div there are a number of additional div sections that are used for different types of messages. The following example formats the message bar for all of those message types.

```css
/* Set the background color, border, and font properties of the message bar */
#flash div#error, #flash div#notice, #flash div#beware, #flash div#alert,
 #flash .alert {
  background-color: #FFCD72; /* light orange */
  border: 1px #FF8800 solid; /* orange */
  color: #6F7866; /* dark gray * /
  font-size: 12px;
}

/* Set the hyperlink color of the message text */
#flash a.title {
  color: #669900 !important; /* green */
}
```

Note: In setting the `#flash a.title` element, we needed to use the CSS !important property to force the formatting to be applied. This is because the formatting you specify in your CSS widget may be reset by one of the Zendesk style sheets that are loaded into the browser after the CSS in your widget. This is how cascading style sheets works; styles are applied in the order they are loaded into the browser. By using the !important property, you can force your formatting to override any other CSS that also sets formatting for the element.

Change the color of the views drop-down menu

The Views menu is located in the top menu bar. This example decribes how to change the look of this menu, including:

- Drop-down menu background color
- Drop-down menu border color
- 'Views' menu name text color
- Background and text color of the menu items
- Background and hyperlink color of the menu items

For more information about getting started with CSS customization in Zendesk, see *How to customize the help desk using CSS*.

Before
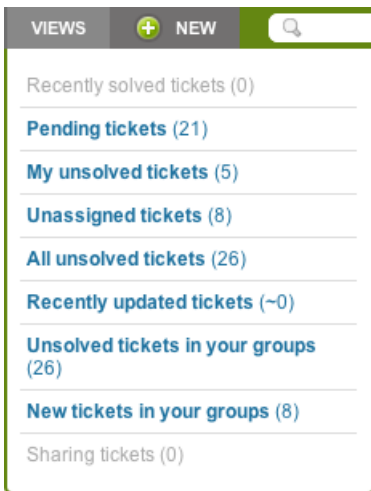
After
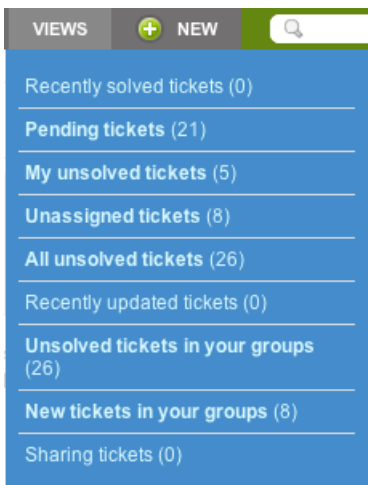
CSS code

```css
/*** Set the color of 'Views' to white ***/
#gray li.drop-header
{
   color:white;
}

/*** Change the background color of the drop-down menu ***/
#gray #views-drop
{
    border: none;
    margin: none;
    background-color: #448ccb;
}

/*** Set the background and text color of the menu items ***/
#gray #views-drop li a
{
    background: none #448ccb;
    color: #D7F8FE;
}

/*** Set the background and text color of the menu items hyperlink ***/
#gray #views-drop li a:hover
{
   background: none #D7F8FE;
    color: #2F6F7B;
}
```

Source code for CSS customization examples

Here is the complete CSS file for our MondoCam demo and training account. It includes the code used in the Cookbook examples in this forum. You may find some slight differences in the code in this file when compared to the Cookbook topics. This is because this is the final product, not steps along the way.

This simple customization makes minor changes to the page layout and also changes font settings and the background colors of many of the elements in the help desk. Feel free to use this to start your own customization.

Updated: 8/9/2011

```
/*** MondoCam CSS customization ***/

/* COLORS:
 * Most of the colors in this CSS are Hex.
 * You can use Hex, RGB, or simple named colors such as 'blue'
 *
 * Header background: #6F7866 - medium gray green
 * Page background: #2E3B3B - dark gray
 * Top menu bar background: #FF8800 - orange
 * Top menu drop down list items: #6F7866 - gray
 * Top menu drop down list hover highlight: #FF8800 - orange
 * Top menu drop down list background: #F1F2E8 - tan
 * H1, H2, H3 color: #6F7866 - gray
 * Sidebar background: #FFFFE1 - pale yellow
 * a links within the content area and sidebar: #669900 - green
 * Misc highlight color: #FFCD72 - light orange
 * Misc body text: #333333 - dark gray
 * Misc fonts: #FFFFFF - white
 */

/*** REPLACE THE ZENDESK HEADER ***/
/*** You also need to add a JavaScript widget to the help desk
 * to create a link to the home page. This is described in
 * https://support.zendesk.com/entries/20263417-replacing-the-header-logo-and-
title
 */

/* Hide the Zendesk logo and help desk title text */
#table_header {
 display: none;
}

/* Increase the size of the header, add a logo, set background color */
#header {
 height: 100px;
 /* Add the link to your logo with the next setting */
 background-image: url(http://LOCATION OF YOUR LOGO.com/your_logo.png);
 background-repeat: no-repeat;
 background-position: top left;
 background-repeat: no-repeat;
 background-color:#6F7866; /* gray */
}

/* Setting the #top background color removes the
 1 px white line above the menu bar */
#top {
    background:#6F7866; /* gray */
}
```

```
/* Set the text properties of links in top-right
 * User name, profile, help, login/logout */
#top-right, #top-right a, #top-right p {
    color:#FFFFFF; /* white */
    font-size:12px;
    font-weight:normal;
    margin:25px 0 0;
    text-shadow:0 2px 3px rgba(0, 0, 0, 0.5); /* This may not work with all
 browsers */
}

/* Change the hyperlink hover color of links in top-right */
#top-right a:hover {
 color:#FF8800; /* orange */
}


/*** SET THE PAGE LAYOUT ***/
/* This customization is described in:
 * https://support.zendesk.com/entries/20266856-setting-the-page-width-and-
removing-the-page-border
 */

/* Set the width of the page */
/* If you want to constrain it
 * to a specific size. */
#page {
 margin: 0 auto;
 width: 1000px;
 max-width: 1000px;
 min-width: 1000px;
 position:relative;
 right: 2px;
 /* These two settings remove the white border next to the header. */
 padding-left:0px;
 padding-right:0px;
}

/* Set the minimum width of the frame */
.frame {
 min-width: 510px;
}

/* Add a border within the content container
 * to compensate for taking it away
 * in #page. */
div#container {
 padding-left:10px;
 padding-right:10px;
}

/*** FOOTER ***/
/* This example formats the footer to match
 * the page width set above and changes
 * text properties.
 * Customizing the footer is described here:
 * https://support.zendesk.com/entries/20264367-customizing-the-page-footer
 */

/* Set the footer width to match the page width */
#footer {
 margin: 0 auto;
 width: 1000px;
 max-width: 1000px;
 min-width: 1000px;
}

/* Set the footer text hyperlink color */
```

```
#footer a {
 color: #FFFFFF; /* white */
}

/* Set the footer text hyperlink hover color */
#footer a:hover {
 color: #FFFFFF; /* white */
}

/* Center the footer text and add a drop shadow
 * to the text. */
#footer p {
 text-align: center;
 color:#FFFFFF; /* white */
 margin:25px 0 0;
 text-shadow:0 2px 3px rgba(0, 0, 0, 0.5); /* This may not work with all browsers
 */
}

/* If you want to completely hide the footer, here's the code */
/* #footer {
 visibility: hidden;
}
*/

/*** TOP MENU BAR ***/
/* This customization is described in:
 * https://support.zendesk.com/entries/20348113-customizing-the-top-menu-bar */

/*** Code for formatting the top menu background, borders, and menu tabs ***/

/* Set the background color of the top menu bar */
#top-menu-background, #top form#topquery {
    background-color: #FF8800; /* orange */
}

/* Set the left border color of the tabs to the same color as the background */
ul#green.agent-tabs li.main {
    border-left: 2px solid #FF8800; /* orange */
}

/* This code controls the positioning of the menu tabs.
*  No need to change anything here - just be sure to include it. */
ul#green.agent-tabs li.tab_home.first, ul#green.agent-tabs
 li.tab_home.first:hover, ul#green.agent-tabs li.tab_forums, ul#green.agent-tabs
 li.tab_forums:hover {
    border-left: 0!important;
    padding-left: 0!important;
}

/* Set the hover background color for the inactive (unselected) tabs */
ul#green.agent-tabs li.main:hover, ul#green.agent-tabs li.over, ul#green
 li.main:hover {
    background:#6F7866; /* gray */
}

/* Set the hover background color for the active (selected) tab */
ul#green.agent-tabs li.active:hover, ul#green.agent-tabs li.active.over {
    border-left: 2px solid #FF8800; /* orange */
    background:#6F7866; /* gray */
}

/*** Code for formatting the drop down menus (Manage and Settings) ***/

/* Set the drop down menu section labels (Business Rules and Sandbox) */
#green li.drop-header {
 color:#464646; /* dark gray */
 background-color: #F1F2E8; /* tan */
```

```css
}

/* Set the drop-down menu background and border color */
#green ul.menu-drop {
 border-color:#FF8800; /* orange */
 background-color: #F1F2E8; /* tan */
}

/* Set the drop-down menu list item text and background color  */
#green ul.menu-drop li a {
 background-color: #F1F2E8; /* tan */
 color: #6F7866; /* gray */
}

/* Set the drop-down menu list item text and background hover color */
#green ul.menu-drop li a:hover {
 color: #FFFFFF; /* white */
 background-color: #FF8800;  /* orange */
}

/*** CONTENT AREA BACKGROUND COLORS ***/
/* This examples sets the background colors for
 * the content containers of the help desk.
 * Details about this customization are here:
 * https://support.zendesk.com/entries/20336093-changing-the-content-area-
background-color */

/* Set the content area background
* and section divider */
.content_grey, div.setting-divider {
 background: #F1F2E8; /* tan */
}

/* To restore the rounded top corner on the left side */
.grey_box_top {
 background: #F1F2E8 url(/images/composite.gif?1284747712) no-repeat scroll;
}

/* To restore the rounded bottom corner bottom on the left side */
.grey_box_bottom {
 background: #F1F2E8 url(/images/composite.gif?1284747712) no-repeat scroll 0
 -10px;
}

/* Set the background color for content_green */
.content_green, .green_box_top, .green_box_bottom {
 background: #FFFFE1; /* pale yellow */
}

/* Set the background and border of the forum headings */
div.category-header {
 background-color: #F1F2E8;
 border-bottom: none;
}

/*** CONTENT AREA FONT SETTINGS ***/
/* This code sets the font size and color for headings
 * and hyperlinks used in the content area.
 * This is described in more detail here:
 * https://support.zendesk.com/entries/20271007-changing-the-font-settings-of-the-
main-content-area */


/* Set the default content hyperlink color */
.content a {
 color: #669900; /* green */
}
```

```css
/* Set the font color of the Edit link */
.content a.edit_this, #search-result a.edit_this {
 color: #669900; /* green */
}

/* Set the font color of the Action link */
.category-top-right .edit_this, .floating_menu_ui .floating_menu_action {
 color: #669900; /* green */
}

/* Sets the font color of misc links */
span.link, p.link {
 color: #669900; /* green */
}

/* Set h2 heading size and color */
.content h2, .content h2 a {
 font-size: 20px;
 color:#6F7866; /* gray */
}

/* Set h2 heading hover size and color */
.content h2 a:hover {
 font-size: 20px;
 color:#669900; /* green */
 text-decoration:underline;
}

/* Set the h3 heading font color */
.frame h3 {
    font-size: 18px;
    color: #6F7866; /* gray */
    font-weight: normal;
}

/*** FORUMS ****/
/* This code formats the headings and hyperlinks
 * in the forums content. This customization is described
 * here: https://support.zendesk.com/entries/20345373-formatting-the-forum-
content-headings */

/* Set the formatting for .frame.colums */
/* This is the container for forums */

/* Set category heading size and color */
.content .frame.columns h2, .content .frame.columns h2 a {
 font-size: 20px;
 color:#6F7866; /* gray */
}

/* Set category heading hover size and color */
.content .frame.columns h2 a:hover {
 font-size: 20px;
 color:#669900; /* green */
 text-decoration:underline;
}

/* Set the font color of h3 active links */
.content .frame.columns h3, .content .frame.columns h3 a {
 color: #6F7866; /* gray */
}

/* Set the font hover color of h3 active links */
.content .frame.columns h3 a:hover {
 color: #669900; /* green */
 text-decoration:underline;
}
```

```css
/* Set the hyperlink color for the forums */
.content .frame.columns a {
 color:#669900; /* green */
}


/*** TICKETS TABLE ***/
/* This code customizes the tickets table.
 * Described here: https://support.zendesk.com/entries/20273691-customizing-the-
tickets-table */

/* Set the header row background color of the tickets table */
table.tickets thead th {
 background-color:#F1F2E8; /* tan */
}

/* Set the font color and background color of the active row */
table.tickets tr.linked:hover > td, table.tickets tr.linked:active > td {
    background-color:#FFCD72; /* light orange */
}

/* Set the background color of the alternating shaded table rows */
table.tickets tr.linked:nth-child(2n+1) {
    background-color: #F1F2E8; /* tan */
}

/* Set the background color of the table 'group by' rows */
table.tickets tr.group_by td {
    background-color: #F1F2E8; /* tan */
    border-bottom: 2px solid #F1F2E8; /* tan */
}

/* Set the color of the bottom border of the table rows */
table.tickets td {
    border-bottom: 1px solid #F1F2E8; /* tan */
}

/*** ALERT MESSAGE BAR ***/
/* The alert message bar is displayed at the
 * top of the page. It is described here:
 * https://support.zendesk.com/entries/20345353-customizing-the-alert-message-bar
 */

/* Set the background color, border, and font properties of the message bar */
#flash div#error, #flash div#notice, #flash div#beware, #flash div#alert,
 #flash .alert {
 background-color: #FFCD72; /* light orange */
 border: 1px #FF8800 solid; /* orange */
 color: #6F7866; /* dark gray */
 font-size: 12px;
}

/* Set the hyperlink color of the message text */
#flash a.title {
 color: #669900; /* green */
}

/*** SIDEBAR ***/
/* This example sets the font sizes and colors
 * and background area of the sidebar.
 * Described here: https://support.zendesk.com/entries/20271027-customizing-the-
sidebar */

/* Set the background color of the sidebar */
.side-box-content, .blue_box_top, .blue_box_bottom, .side-box-with-image, .r_blue
 {
 background-color: #FFFFE1; /* pale yellow */
}
```

```css
/* Set the body text font color */
.side-box-content, .side-box-content .user_formatted {
 color: #333333; /* dark gray */
}

/* Set hyperlink font color */
.side-box-content a, #sidebar .widget a, #widget_manager_widget a {
 color: #669900; /* green */
}

/* Set heading (h3) font color */
.side-box-content h3, #sidebar .widget h3, #widget_manager_widget h3 {
 color:#FF8800; /* orange * /
}
```