

Zendesk[®]

Administrator Guide

Setting up and managing your
Zendesk (Last update: June 12, 2013)

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Zendesk® Administrator Guide

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Zendesk versions

On 9/12/12, we released a new version of the agent and administrator interface of Zendesk. During the beta period, this was known as 'Lotus'. The Zendesk you knew before 9/12 is now referred to as 'Zendesk Classic'. In this guide, we refer to the new version as simply 'Zendesk' and qualify that with 'new' or 'current version' when needed to distinguish between the two versions. Therefore, the instructions for navigating the Zendesk user interface are given first for the new version and then again for the Classic version, which are noted as 'Zendesk Classic'.

The Classic version will remain available as our customers move over to the new version, but at some point it will be retired.

Chapter

1

Zendesk basics

- *Zendesk glossary*
- *Understanding Zendesk user roles*
- *About organizations and groups*
- *Streamlining your support workflow*
- *Security best practices*
- *Using the Admin home page*
- *Zendesk system requirements*

Zendesk glossary

This glossary describes the key concepts and terminology used throughout Zendesk and is a good place to get started learning how to set up and use your Zendesk.

Administrator

Administrators are agents with additional privileges to manage and customize your Zendesk. 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 business rules (automations, macros, SLA service targets, triggers, views)
- Access and edit all 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 administrators
- Promote agents to the administrator role
- Create groups and organizations
- Assume another user's identity
- Create custom agent roles

For more information about user roles, see [Understanding Zendesk user roles](#).

Advisor

This is a Zendesk Enterprise agent role. Advisors manage the workflow and configure your Zendesk. 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 your support staff. They are assigned tickets and interact with customers as needed to resolve support issues. The agent's role and privileges 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 your Zendesk
 - 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

For more information about user roles, see [Understanding Zendesk user roles](#).

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. See [Managing your tickets](#) in the Zendesk Agent Guide.

Agent signature

An agent signature is a standard text signature that can be appended to all public comments made by agents. Agents can customize their signature on their profile page. See [Adding agent signatures](#).

Assignee

Assignee is the agent assigned to a ticket. Assignee is used in macros, views, automations, triggers, and reports to refer to or set the assigned agent. See [Understanding Zendesk user roles](#).

Assignee stations

This is the number of agents who have successively been assigned to a ticket. This is used as a condition in triggers. See [Streamlining workflow with ticket updates and triggers](#).

Assuming a user

Administrators can sign in to the help desk as another user. This is referred to as *assuming a user*. This allows administrators to see another user's view of your Zendesk. See [Assuming users](#).

Audit log

In the Enterprise version of Zendesk, you can track the account and user changes that have been made by you and members of your support staff.

Specifically, the Audit log shows all events related to the following:

- Agent/admin password
- Agent role
- Global password policy
- Account status
- Account billing cycle
- Account plan type
- Maximum number of agents for your account
- Agent/admin creation and deletion

See [Viewing the Audit log for account and user events](#).

Automation

Automations are similar to triggers (see [Trigger](#) below) 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 your Zendesk. For more information, see [Using the whitelist and blacklist to control access to your Zendesk](#).

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. See [Setting your business hours](#).

Business rules

Business rules is used to refer to the Zendesk features that enable you to customize and manage the ticket workflow: automations, macros, SLA service targets, triggers, and views. More information about business rules can be found here: [Streamlining your support 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. See [Setting up and managing forums](#).

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](#)

For more information, see [About Zendesk 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. See [Setting up your Chat channel](#).

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 and requesters can add comments to the ticket. Comments can also be added by automations, macros, and triggers. 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 Web portal using CSS (cascading style sheets) code. You modify the look of your Web portal using CSS widgets, which can be added by an administrator. For more information, see [How to customize your Web portal 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. See [Understanding Zendesk user roles](#).

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 Zendesk. 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 support experience by rating their solved tickets. For more information, see [Using customer satisfaction rating](#).

Dashboard

A dashboard is an area of the Zendesk agent interface 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 your Zendesk account, a default email address is created 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. See [Forwarding email from other email providers](#).

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. You can customize your email templates to match your branding and to modify the wording. See [Customizing your email templates](#).

Email-only support

Many companies prefer to offer their customers support via email only. 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. For more information, see [Setting up to provide email-only support](#).

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 your Zendesk. 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 Zendesk user roles](#).

Extensions

Extensions are tools that extend the functionality of your Zendesk. For example, you can add CSS and JavaScript widgets to customize the look or functionality of your Zendesk 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.

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 Zendesk or any other web site (such as your company web site). This feature used to be referred to as the Zendesk Dropbox. See [Setting up your Feedback Tab channel](#).

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. See [Setting up and managing forums](#).

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. See [Streamlining workflow with ticket updates and 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. See [Changing the address of your web portal \(host mapping\)](#).

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. See [Setting up and managing forums](#).

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 [Using macros to update and add comments to tickets](#) in the Zendesk Agent Guide.

Multiple brand Zendesk

In the Enterprise version of Zendesk, you can manage support for multiple brands by linking separate spoke Zendesk accounts to a hub Zendesk account. Support requests are received by the spoke accounts and are automatically shared to the hub Zendesk, 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 Zendesk accounts](#).

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. See [Understanding Zendesk user roles](#).

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 your Zendesk 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 your Zendesk that other administrators do not, such as invoicing, payment options, and benchmarking for the account. See [Understanding Zendesk 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 Zendesk account 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 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 Zendesk to generate views and reports and it's also used as conditions and actions in automations and triggers and as actions in macros. See [About ticket fields](#).

Remote authentication

Remote authentication refers to the process of authenticating your users outside of your Zendesk (for example, via social media single sign-on providers, such as Facebook and Google, or via enterprise single sign-on using JSON Web Token (JWT) or Secure Assertion Markup Language (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 [Monitoring ticket activity and agent performance with reports](#).

Requester

Requester refers to the person who made the support request. Requester is used in macros, views, automations, triggers, and reports to refer to the person who generated the support request. See [Understanding Zendesk user roles](#).

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. See [Understanding Zendesk user roles](#).

SAML

Available in the Plus and Enterprise versions of Zendesk, Secure Assertion Markup Language (SAML) is one of the two types of enterprise single sign-on available for remotely authenticating users, the other is JSON Web Token (JWT). See [Single sign-on \(SSO\) options in Zendesk](#).

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

In addition to the user authentication provided by Zendesk, you can also use single sign-on, which authenticates your users outside of your Zendesk. There are two types: social media single sign-on and enterprise single sign-on. Social media single sign-on are additional login options that you can provide for your customers convenience. For example, you can make the Facebook, Google, and Twitter logins available on your web portal login page. Enterprise single sign-on is provided by JSON Web Token (JWT) and Secure Assertion Markup Language (SAML). SAML is available in the Plus and Enterprise versions of Zendesk. See [Single sign-on \(SSO\) options in Zendesk](#).

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 team 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, On-hold, 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). See [About ticket fields](#).

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 your Zendesk. 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 sign in to your Zendesk and any new support requests you receive from the user are sent to the suspended tickets queue. For more information, see [Suspending a user](#) in the Zendesk Agent Guide.

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 and spam](#).

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 your Zendesk 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 your 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. 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. See [About ticket fields](#).

Ticket sharing

Tickets can be shared between Zendesk accounts so that you can collaborate on solving tickets. You establish sharing agreements with other Zendesk accounts and specify the terms under which sharing can occur, and how shared tickets are managed. For more information, see [Sharing tickets with other Zendesk accounts](#).

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. See [About ticket fields](#).

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](#) in the Zendesk Agent Guide.

Voice

The Voice channel integrates live telephone support into your Zendesk. 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. In the new version of Zendesk, you can also make outbound calls. For more information, see [Setting up Zendesk Voice](#).

Web portal

This refers to the parts of your Zendesk that are available to end-users to submit tickets, track their support requests, and access your knowledge base and forums. See [Setting up and managing 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 your Zendesk (and not suspended). For more information, see [Using the whitelist and blacklist to control access to your Zendesk](#).

Widget

Available in the Classic version of Zendesk, a widget is a small application that extends the functionality of your Zendesk. You can add widgets into your Zendesk for a number of popular cloud-based applications and services such as Salesforce and Google Analytics or you can create your own custom widgets. See [Developing Zendesk Widgets](#) (this document is only available in English). In the new version of Zendesk, you build Apps to extend your Zendesk. See [Developing Zendesk Apps](#) (also only available in English).

Understanding Zendesk user roles

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

Users and people are essentially equivalent terms; it's the broadest definition for all people who use your Zendesk. When you need to manage people in your Zendesk, your starting point is almost always the **People** page. 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 your Zendesk, although you may change a user's role as needed. And, when users sign in, they are only shown the parts of your Zendesk 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.). End-users don't have access to any of the administrator and agent features of Zendesk. They can only submit and track tickets and communicate with agents publicly, which means that their ticket comments can never be private.

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

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

You can also control if and how your end-users access your Web portal. This is the end-user's view of your Zendesk 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 to provide email-only support](#).

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 your ticket workflow. For more information, see [About organizations and groups](#).

Agents, administrators, account owner

The people who resolve support requests, you, play different roles in setting up and managing your ticket workflow.

Agents

Agents are the bulk of the support staff. They are assigned tickets and interact with customers as needed to resolve support issues. The agent's role and privileges 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
- Create and edit their own views
- Can view reports
- Moderate and manage articles in the forums
- Access tickets in one of the following ways:
 - All tickets in your Zendesk account
 - 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

In the Enterprise version of Zendesk, you can define your own agent roles and choose what each role is allowed to see and do in your Zendesk. For more information, see [Custom agent roles](#).

Administrators can add new agents 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 administrator role by an administrator.

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. These are explained in [Creating, managing, and using groups](#).

Notwithstanding ticket access restrictions, CC'ing an agent on any ticket lets the agent receive email notifications of all public and private updates to the ticket. For example, suppose an agent is only allowed to see tickets in the L2 group. After the agent is CC'ed on a ticket in the L3 group, the agent gets email notifications of all public or private updates to the ticket even though she's not authorized to see L3 tickets.

Administrators

Admins are agents with additional privileges to manage and customize your Zendesk. 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 business rules (automations, macros, SLA service targets, triggers, views)
- Access and edit all 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
- Create custom agent roles

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

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

Account 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 your Zendesk that other administrators 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 to *requester*, *submitter*, *assignee*, *current user*, and *non-restricted agent*.

Requester

Requester refers to the person who made the support request. Requester is used in 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 in 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 Zendesk users and the ticket handling workflow.

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 support 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 Zendesk 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 your Zendesk to manage your 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 support 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 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 your Zendesk. 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 (support 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 Zendesk 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

Administrator and agent roles for users, groups, and organizations

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

Administrators

- 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 your support workflow

Managing your customers' support issues and your ticket 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 ticket 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 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:

The screenshot shows the configuration for a macro titled "Intranet is down". The macro is configured to perform the following actions:

- Comment/description:** A text box containing the message: "Hello {{ticket.requester.first_name}}
Thanks for contacting us about the intranet outage. The IT helpdesk team is aware of the problem and they are working on it now. An email will be sent to everyone when it's fixed.
Thanks,
Support". A link "View available placeholders »" is visible below the text box.
- Status:** Set to "Solved".
- Add tags:** The tag "intranet" is added.
- Assignee:** Set to "(current user)".

At the bottom, the macro is available for "All agents" (selected), "Agents in group Facilities_US", and "Me only". There are "Delete" and "Update macro" buttons at the bottom right.

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:

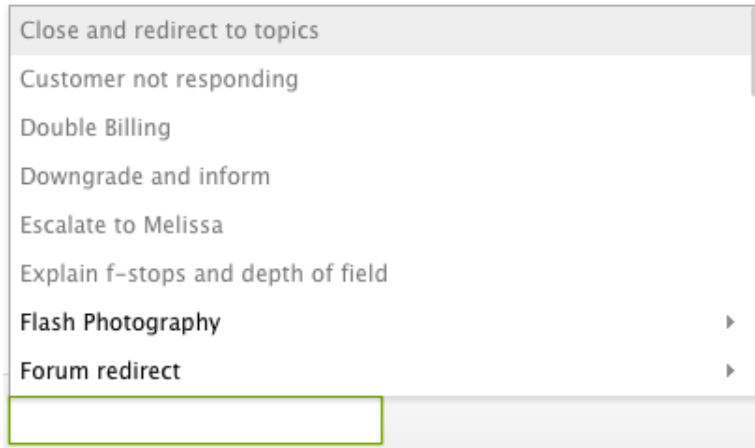
The screenshot shows the configuration for a macro titled "Take it!". Under "Perform these actions:", there are two actions: "Group" set to "(current user's groups)" and "Assignee" set to "(current user)". There is an "Add action" button with a green plus sign. At the bottom, "Macro available for" is set to "Agents in group" with "Facilities_US" selected. There are "Delete" and "Update macro" buttons at the bottom right.

The **Take it!** macro assigns the ticket that an agent is currently viewing to that agent and the agents group. You can view the **Take it!** macro to see this for yourself.

To see the **Take it!** macro

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Macros**.
Zendesk Classic: Select the **Manage** menu, then select **Macros**.
2. Click the **Edit** link beside the **Take it!** macro to see all 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 [Using macros to update and add comments to tickets](#) in the Zendesk Agent Guide.

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:

Trigger title

Notify requester of received request

Meet **all** of the following conditions:

Ticket is... Created

Status Is not Solved

Add condition

Meet **any** of the following conditions:

-- Click to select condition --

Add condition

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

Delete or Update trigger

You can view the **Notify requester of received request** trigger to see this for yourself.

To view the Notify requester of received request trigger

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **Triggers and mail notifications**.
2. Click the **Edit** link beside the **Notify requester of received request** trigger to see all the conditions.

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. If you set up your Zendesk to provide support only through email, you can remove the ticket URL. See [Setting up to provide email-only support](#). 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:

The screenshot shows the configuration for an automation. The title is "Automation title: Close ticket 4 days after status is set to solved".

Under "Meet all of the following conditions:", there are two conditions:

- Status is Solved
- Hours since solved Greater than 96

Under "Meet any of the following conditions:", there is one placeholder:

- Click to select condition --

Under "Perform these actions:", there is one action:

- Status Closed

At the bottom right, there are buttons for "Delete or Update automation".

You can view the **Close ticket 4 days after status is set to solved** automation to see this for yourself.

To view the **Close ticket 4 days after status is set to solved** automation

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **Automations**.
2. Click the **Edit** link beside the **Close ticket 4 days after status is set to solved** automation to see all the conditions.

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 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.

To see a complete list of the types of targets you can create

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select the **Settings** menu, then select **Extensions**.
2. Click the **Target** tab.
3. Click the **Add target** link.

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 are helpful throughout the entire support workflow, but are especially so for the following support 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](#).

Using the Admin home page

The Admin home page is designed to give you the tools you need to configure Zendesk. It's the place to go if you need to change something.

The page also gives you a snapshot of your current configuration. The information is useful if you're looking for ways to optimize Zendesk to meet your support goals.

FEATURE USAGES

<p>Macros Details ▾</p> <p>4</p> <p>Used today 0</p> <p>Updated today 0</p>	<p>Triggers Details ▾</p> <p>9</p> <p>Used today 0</p> <p>Updated today 0</p>
<p>Automations Details ▾</p> <p>2</p> <p>Used today 0</p> <p>Updated today 0</p>	<p>Views Details ▾</p> <p>11</p> <p>Updated today 0</p>

SUGGESTED FEATURES

ACTIVE FEATURES

GoodData

Use the dashboards and reports provided by the advanced analytics feature to track the performance of your support team.

Topic suggestion

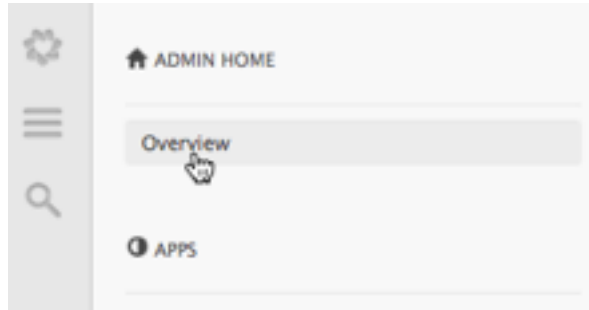
Help your customers find answers to their questions before they submit a ticket by suggesting knowledge base articles in your forums.

Agents have access to a version of the Admin page that's tailored to their permissions and needs.

To access the Admin home page

- Click the **Manage** (⚙️) icon on the lower-left side of the page.

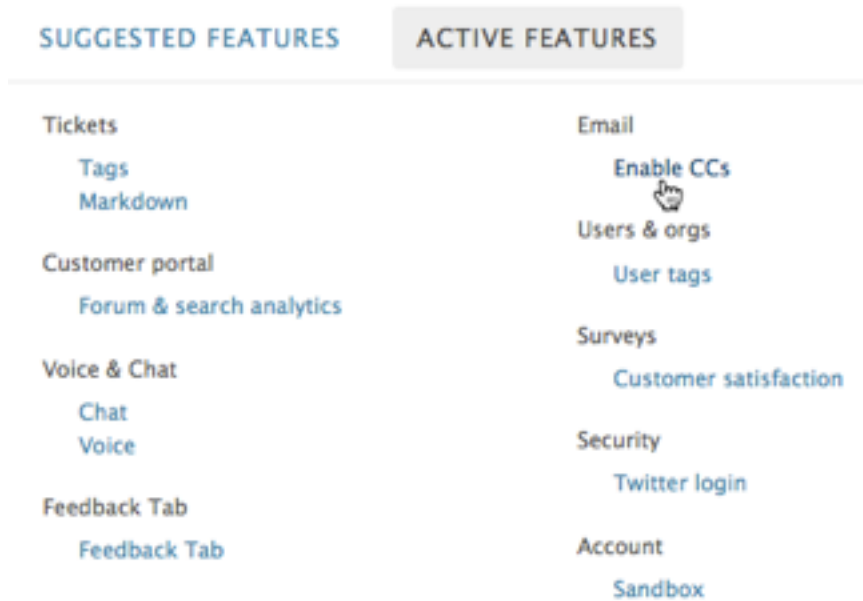
If you're on another admin page, you can get back to your home page by clicking **Overview** at the top of the sidebar.



Tip: Bookmark the page for quick one-click access. The URL is https://your_subdomain.zendesk.com/agent/#/admin/overview.

To make changes to your Zendesk

1. Click the **Active Features** tab on the Admin home page.



2. Select one of the features to configure it.

Zendesk system requirements

Zendesk is a Web-based SaaS (software as a service) application; therefore there are no operating system requirements since it runs in a Web browser. We do however support and recommend using the following Web browsers.

For the agent/administrator user interface:

- Google Chrome v. 19 and higher
- Mozilla Firefox v. 10 and higher
- Apple Safari v. 5 and higher
- Microsoft Internet Explorer v. 9 and higher

For the end-user Web portal:

- Google Chrome v. 19 and higher
- Mozilla Firefox v. 10 and higher
- Apple Safari v. 5 and higher
- Microsoft Internet Explorer 7 and higher

Note: Our testing suggests that Google Chrome provides the best performance when running Zendesk.

Chapter

2

User management

- *Adding end-users, agents, and administrators*
- *Managing users*
- *Bulk importing users and organizations*
- *Creating, managing, and using groups*
- *Creating, managing, and using organizations*
- *Adding tags to users and organizations*
- *Adding an agent alias (Plus and Enterprise)*
- *Assuming users (Zendesk Classic)*
- *Custom agent roles (Enterprise)*
- *What is a light agent? (Enterprise)*

Adding end-users, agents, and administrators

You can add users to your Zendesk manually one at a time, through a bulk import of users, through the Zendesk API, and also as new end-users submit requests for the first time. The term *users* here also refers to agents and administrators.

This article covers the following topics:

- [Adding a user](#)
- [About the user options](#)
- [Setting agent privileges and defining ticket access](#)
- [Removing or replacing an agent](#)

Once users have been added, 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 a user

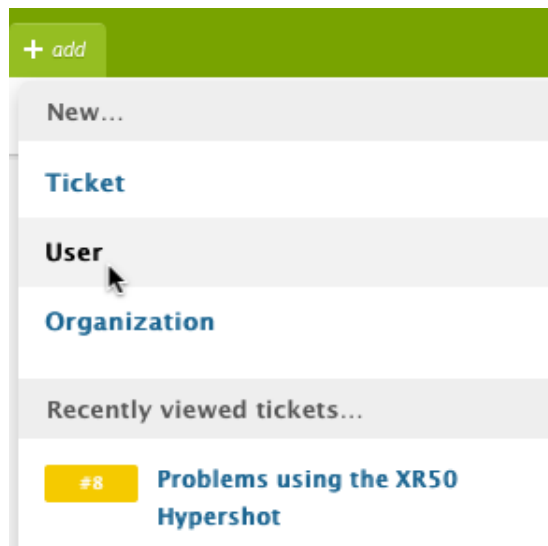
Administrators can add end-users, agents, and administrators. Agents can add end-users only.

For information about the administrator and agent roles, see [Understanding Zendesk user roles](#).

Zendesk Classic: The following procedure is not applicable to Zendesk Classic. To add a user in Classic, select **Manage > People**, then click **Add user**. Enter the user's information and set privileges (refer to the table below), then click **Create**. For Enterprise, agent privileges are determined by the **Agent Role** you select. See [Custom agent roles](#).

To add a user

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



2. Enter the user's full name and email address.
3. Click **Save**.

You can add additional information to the user's profile after clicking **Save**.

4. When the user's profile opens, select a **Role**.
5. If you're adding an agent, set privileges for the agent. See [Setting agent privileges and defining ticket access](#) below.

If you get an error when adding an agent, make sure you haven't exceeded the total number of agents on your account. You can add more agents to the account if you need them. See [Manage > Account > Subscriptions](#).

6. Enter the user's profile information. See [About the user options](#) below.
7. If you want to add additional contact info, click **Add contact**, select the type of contact, then enter the contact info in the field that appears. Repeat as needed.

The new user is saved automatically, so when you are finished you can simply navigate away. The new user receives the welcome email and verification link to choose a password and sign in for the first time.

Users can also be added in a bulk import. See [Bulk importing users and organizations](#).

About the user options

The following table describes the options that can be set for a new user.

Zendesk Classic: In Zendesk Classic, order of the options is different than in the current version of Zendesk

Profile data	Description
Name	User's name.
Email	Email address used for all email communications with the user.
Role	<p>Defines the user's function and access level in your Zendesk. There are three user types: End-user, Agent, Administrator. Only administrators can change a user's role.</p> <p>For more information, see Understanding Zendesk user roles.</p>
Contacts	Other contact information for the user, such as Phone, Twitter handle, Facebook page, and Google account.
Phone	Personal telephone number for the user.
Alias	<p>Alternative name to use on all communications with end-users instead of the user's real name. If this field blank is blank, the user's real name will be used in email communications.</p> <p>Zendesk Classic: This option is called Display name.</p> <p>For more information, see Adding an agent alias.</p>
Signature	Closing line added to the user's email notifications.
Tags	List of tags that will automatically be added to new tickets created by this user. Separate tags with a space. Tags are added to new tickets only, not updated tickets. This is an optional feature and your Zendesk may not have enabled user tagging.

Profile data	Description
	For more information about user tags, see Adding tags to users and organizations .
Organization	A collection of users (both end-users and agents) created by an administrator. Agents can be a member of only one organization. For more information, see About organizations and groups .
Language	Language the user will view your Zendesk in. This setting affects this user only.
Time zone	Local time zone; used to time stamp tickets. This setting affects this user only.
Details	Additional details about the user. Address, for example. Details are visible to other agents but not end-users.
Notes	Additional notes about the user. Notes are visible to other agents but not end-users.

Setting agent privileges and 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:

Privileges	Description
Groups	This is the list of groups in your Zendesk. You can select one or more. Agents must be added to at least one group. For more information, see About organizations and groups .
Access	An agent's access to tickets is defined as one of the following: <ul style="list-style-type: none"> • All tickets • Ticket's in agent's org • Assigned tickets only <p>If you select to restrict the agent to an organization, you must also set the agent's organization (on the Add user page). See Restricting an agent to one organization.</p> <p>Notwithstanding ticket access restrictions, CC'ing an agent on any ticket lets the agent receive email notifications of all public and private updates to the ticket.</p>

Privileges	Description
Comments	<p>Zendesk Classic: This option is called Has access to.</p> <p>You determine the type of comments an agent can make on tickets.</p> <ul style="list-style-type: none"> • Notes and replies enables the agent to add both internal notes and public replies to tickets. • Notes only enables the agent to add only internal notes to tickets. <p>Zendesk Classic: This option is called Can add ticket comments that are. You can select Public or Private or Private only (viewable only by other agents).</p>
Forums	<p>You can limit the number of agents who can moderate your forums.</p> <ul style="list-style-type: none"> • Viewer means that the agent cannot moderate forums. • Editor enables the agent to moderate forums. <p>Zendesk Classic: This option is called Can moderate (edit, delete and reorder) topics in forums and you select Yes or No. Some support teams assign only a few agents to moderate the forums so those agents are set to 'yes'; others are set to 'no'.</p>

Removing or replacing an agent

To replace an agent with another agent, demote the current agent to an end-user and then add a new agent. By demoting instead of deleting an agent, you can preserve some information about the agent.

To remove an agent

1. Make sure to reassign all the tickets currently assigned to the agent.
2. Open the agent's profile page. Click **Manage > People > Agents**, and then click the **Edit** button on the right side of the agent's name.
3. Downgrade the agent by selecting **End-user** as the new Role.
4. Confirm that you want to downgrade the agent's role.
5. Update any triggers and automations that auto-assigned tickets to the agent.

If you want to completely remove the agent after the downgrade, use the **User Options** menu on the profile page.

Managing users

An administrator can change an agent's role to administrator if needed. Administrators can also reset user passwords.

The account owner of your Zendesk can change the account owner by promoting an administrator to account owner. There can only be one account owner.

This topic covers the following:

- [Promoting an agent to the administrator role](#)
- [Changing the account owner](#)
- [Resetting user passwords](#)

For information about adding users, see [Adding users](#).

Promoting an agent to the administrator role

Administrators can also promote agents to the administrator role.

To promote an agent to the administrator role

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select **Manage > People**.
2. Click **Agents**.
3. Select an agent and click **Edit**.
4. Change their role to administrator by selecting **Admin**.
5. Click **Update**.

An email is sent to all administrators notifying them that the person has been added as an administrator.

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

Changing the account owner

Only the account owner can promote an administrator to the account owner role. For more information, see [Account owner](#).

To promote an administrator to account owner


1. Click the **Manage** icon (⚙️) in the sidebar, then select **Account**.
Zendesk Classic: Select **Settings > Account**.
2. Click the **Invoices** tab.
3. Select an administrator from the **Account Owner** drop-down list. You must have at least one other administrator in your help desk to see the list.
4. Click **Save Tab**.

By setting another administrator 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.

Resetting user passwords

Administrators can reset a user's password by sending a reset email to the user's registered email address. The email contains a link that lets the user reset his or her password.

To reset a user's password

1. Click the **Manage** icon () in the sidebar and select **People**.
2. Locate the user who forgot his or her password and click the **Edit** link to the right of the user.
3. Click **User options** in the bottom toolbar, then select **Reset Password**

You can also manually set a user's password if the option has been enabled by the Zendesk account owner. See [Allowing administrators to set passwords](#). Instead of selecting **Reset Password** in the steps above, select **Set Password** and specify a new password for the user.

Note: Zendesk recommends using the email reset workflow instead of setting passwords manually. A common hacker technique is to repeatedly call or email a support center posing as a frustrated customer who forgot his or her password and who is unable to recover it, and persisting until a support agent has no choice but to change the password manually for the irate customer. If in doubt, use the **Reset Password** option and send a password-reset email.

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 administrators 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 Zendesk, 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. 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 1: 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 <i>Creating, managing, and using organizations</i> .
shared	True or False. Sets the organization as a shared organization. See Shared organization for end-users in <i>Creating, managing, and using organizations</i> .
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 <i>Creating, managing, and using organizations</i> .
group	Enter a default group for the organization. See Mapping a group to an organization in <i>Creating, managing, and using organizations</i> .
tags	When user and organization tagging has been enabled for your Zendesk (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. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **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 Zendesk. If you want to add some additional organization data after you've added the organizations to your Zendesk, 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 your Zendesk 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 your Zendesk, 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. 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: User import data

Field	Description
name	User's full name.
email	Required. User's full email address (someuser@mycompany.com).
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	Case sensitive: "End-user", "Agent", or "Admin". If you don't set a role, the user is set to end-user.
restriction	<p>Required when the user's role is set to agent. Restriction sets the agent's privileges, the tickets they have access to, etc.</p> <p>You can enter one of the following values:</p> <ul style="list-style-type: none"> • 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) <p>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.</p>
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 Zendesk (see Adding tags to users and organizations), you can add user tags. Separate each tag with the comma.

A note about welcome email sent to users in a bulk import

When you add new users to your Zendesk via a bulk import, each user receives the welcome email message. The welcome email contains a link to verify their email address, which prompts them to select a password and then sign in to your Zendesk. You can prevent the welcome email from being sent to all these users by updating the welcome email setting.

To prevent the welcome email message being sent to users

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Customers**.
Zendesk Classic: Select the **Settings** menu, then select **End-users**.
2. In the **User welcome email** section, uncheck the **Also send a welcome email when a new user is created by an agent or administrator** setting.
3. Click **Save tab**.

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:

- Admin
- 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", "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 Zendesk, 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. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **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 Zendesk. If you want to add some additional user data after you've added the users, your CSV file must also contain all the original data from the initial bulk import plus the new data. See [Updating existing user profile data](#) below.
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 users are added to your Zendesk when the import process is complete. See [Limitations of bulk importing users and organizations](#). You'll receive an email when the import is complete.

Updating existing user profile data

As noted above, when doing a bulk import, you can select the **Update existing users** option, which allows you to update the user profile data of users that you've already added to your Zendesk. Be aware however that some of the data is replaced and some of the data is just appended to the existing data.

The following user data is replaced:

- name
- email
-
- external_id
- phone
- role
- restriction
- organization

The following user data is appended (added to the existing data):

- details
- notes
- tags

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. Administrators can add and edit groups, agents cannot.

To create a group

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **People**.
2. Select **Add group**.
3. Enter a group name.
4. Select the agents you want to add to the group.
5. Click **Create group**.

Administrators can view and manage all groups by selecting **Groups** on the **People** page.

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 Zendesk. Only administrators can add new agents.

To add a new agent to a group

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **People**.
2. Select **Add user**.
3. Enter information about the new user.
4. In the section called **Role - privileges granted to this user**, select **Agent**.
5. All of your groups are displayed. Select one or more.
6. Set the agent's other privileges (described below).
7. 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 3: Agent privileges

Privileges	Description
Groups	This is the list of groups in your Zendesk. You can select one or more. Agents must be added to at least one group. For more information, see About organizations and groups .
Has access to	<p>An agent's access to tickets can be defined with the following options:</p> <ul style="list-style-type: none"> • 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 <p>Notwithstanding ticket access restrictions, CC'ing an agent on any ticket lets the agent receive email notifications of all public and private updates to the ticket.</p> <p>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.</p>
Can add ticket comments that are	<p>You can limit an agent to making both public and private comments on tickets.</p> <ul style="list-style-type: none"> • Public or private • Private only (viewable only by other agents) <p>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.</p>
Can moderate (edit, delete and reorder) topics in forums	<p>Yes or no.</p> <p>Some support teams assign only a few agents to moderate the forums. These agents are set to 'yes', the others are set to 'no'.</p>

Assigning tickets to groups

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

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](#).

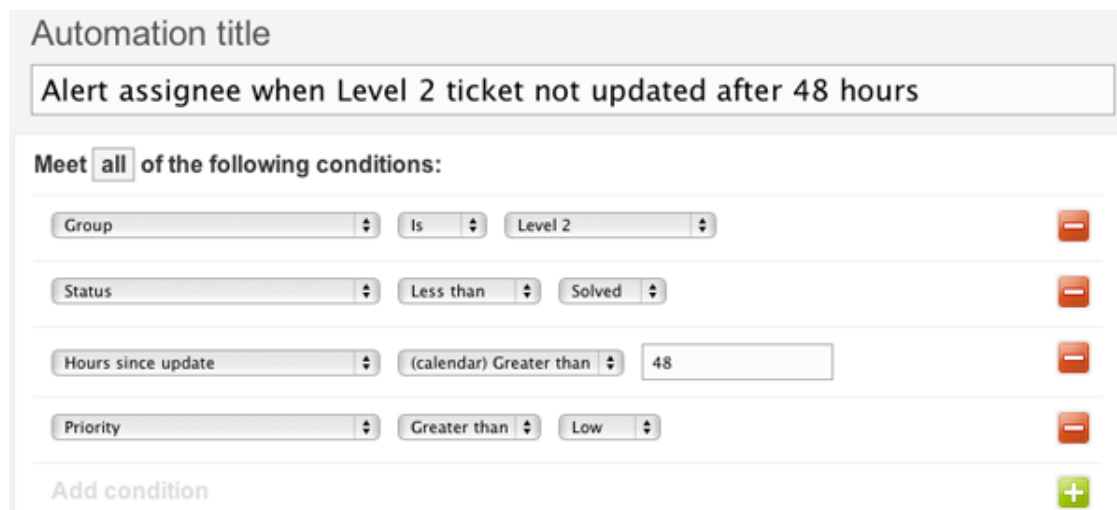
Using groups in business rules

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 screenshot shows the configuration for an automation rule. The title is "Alert assignee when Level 2 ticket not updated after 48 hours". The rule is set to "Meet all of the following conditions:" and includes four conditions:

- Group is Level 2
- Status is Less than Solved
- Hours since update (calendar) Greater than 48
- Priority is Greater than Low

Each condition has a red minus sign to remove it, and there is a green plus sign to add a new condition.

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.

Perform these actions:

Priority ⌵ ⌵

Email user ⌵ ⌵

Email subject:

Email body:

[View available placeholders >](#)

Add action +

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 Zendesk by following these steps:

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **Triggers and mail notifications**.
2. Locate the **Notify group of assignment** trigger and then select **Edit**.

Trigger title

Meet all of the following conditions:

Group ⌵ ⌵

Group ⌵ ⌵ ⌵

Assignee ⌵ ⌵ ⌵

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 your Zendesk 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 Zendesk by following these steps:

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Views**.
Zendesk Classic: Select the **Manage** menu, then select **Views**.
2. In the **Shared** tab, locate the **Unsolved tickets in your groups** trigger and then select **Edit**.

The screenshot shows the configuration for a view titled "Unsolved tickets in your groups". It features a filter section with the following conditions:

- Meet **all** of the following conditions:
- Condition 1: Status is **Less than** **Solved**.
- Condition 2: Group is **Is** **(current user's groups)**.

There are buttons to remove each condition (red minus signs) and an "Add condition" button (green plus sign).

This view displays unsolved tickets that are assigned to your groups. You could of course select one or more specific groups instead if you were to customize this view.

The screenshot shows the result of the view, titled "Unsolved tickets in your groups (24)". The table is formatted as follows:

Score	Subject	Requester	Requested	Status	
Group Engineering					
	White Balance Issues	Matthew Latkiewicz	Apr-07	Pending	<input type="checkbox"/>
Group Consumer Sup...					
	How can I correct image distortions and color blur in images?	Mary Jones	Mar-29	Open	<input type="checkbox"/>
	I have a double charge on my credit card	Mary Jones	Apr-12	Open	<input type="checkbox"/>
	having problems with my DSLR, need help taking pictures	Obie Fernandez	Apr-01	Open	<input type="checkbox"/>
■	My pictures come out all black. Why is that?	Emily Wilcox	Apr-14	Open	<input type="checkbox"/>
■	Can I ask you a question?	Erica End User	Apr-15	Open	<input type="checkbox"/>
■	Where can I buy a ZD 89	Aleigh77	Apr-04	Open	<input type="checkbox"/>

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.

Report title

Reporting period

Relative to today Fixed date interval

|

Data series

Remove

Remove

Remove

+

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. Administrators can add and edit organizations, agents cannot.

Creating organizations

Administrators can add organizations, agents cannot.

To create an organization

1. Hover over the **+add** tab, then select **Organization**.

Note: Zendesk Classic: This procedure is not applicable. To add an organization in Classic, select **Manage > People**, then click **Add Organization**. Enter a name, tags, and information. Optionally, set up user mapping and group mapping and enable a shared organization (see sections below). Click **Create organization**.

2. Enter the **Organization name**, then enter **Email domains** (separated by a space) if you want to set up user mapping.

When you set up user mapping, users from these email domains will be automatically added to this organization when they submit a request for the first time or otherwise register with your Zendesk.

3. Click **Save**.

You can add additional information after clicking **Save**.

4. Optionally, enter **Tags**.

For more information about organization tags, see [Adding tags to users and organizations](#).

5. Select a **Group** if you want to set up group mapping.

When you set up group mapping, an organization's tickets are automatically assigned to the specified group. This can be set up by an administrator.

6. For **Users**, determine whether users in this organization **Can view own tickets only** or **Can view all org tickets**.

Allowing all of the end-users in an organization to see each other's tickets is referred to as a *shared organization*.

7. If you selected **Can view all org tickets**, you can select **And add comments** if you want to allow users to add comments to shared organization tickets.
8. Enter any **Details** or **Notes** you want.

The new organization is saved automatically, so when you are finished you can simply navigate away.

Administrators can view and manage all organizations clicking the **Manage** icon () in the sidebar, then selecting **People**. On the People page, click **Organization**.

Note: Zendesk Classic: Select **Manage > People**, then click **Organization**.

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 your Zendesk. This is referred to as *user mapping* and an administrator can set this up by editing an organization's settings.

To set up user mapping for an organization

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **Organizations**.
3. Find the organization you want to edit and then click **Edit**.

Alternatively, you can search for the organization.

4. In **Domains** enter the email domain(s) (separated by a space) to set up user mapping.

Note: Zendesk Classic: In the **Map email domain to organization** option, enter the email domain(s) (separated by a space), then click **Update Organization**.

Your update is saved automatically, so when you are finished you can simply navigate away. If you've added email domains to the whitelist (see [Using the whitelist and blacklist to control access to your Zendesk](#)), 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 administrator.

To set up group mapping for an organization

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **Organizations**.
3. Find the organization you want to edit and then click **Edit**.

Alternatively, you can search for the organization.

4. Select a **Group** from the drop-down list to set up group mapping.

Note: Zendesk Classic: Under the **Map organization to group** option, select one group from the drop-down list, then click **Update Organization**.

Your update is saved automatically, so when you are finished you can simply navigate away. New tickets will now automatically be assigned to the selected group; however, business rules and agents may override this default group setting.

Setting up a 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. This is referred to as a *shared organization*. This can be set up by an administrator.

To set up a shared organization

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **Organizations**.
3. Find the organization you want to edit and then click **Edit**.

Alternatively, you can search for the organization.

4. For **Users**, select **Can view all org tickets**, then, if you want to allow users to add comments to shared organization tickets, select **And add comments**.

Note: Zendesk Classic: In the **Shared organization** section, select **Enabled**, and, if you want to enable end-users to add comments to the shared organization tickets, select **Enable commenting**. Click **Update Organization**.

Your update is saved automatically, so when you are finished you can simply navigate away. Instead of allowing all end-users in an organization to see 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. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **End-users**.
3. Find the end-user you want to edit and then click **Edit**.

Alternatively, you can search for the user.

4. In **Access**, select **Tickets from user's org**.

Note: In Zendesk Classic, in the roles section, select **Allow access to tickets in end-user's organization**, then click **Save tab**.

Your update is saved automatically, so when you are finished you can simply navigate away.

Editing and deleting organizations

You can edit an organization's settings or delete an organization as needed.

Note: When you delete an organization, any business rules or reports you set up using the organization you deleted will no longer function properly.

To edit an organization

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **Organizations**.
3. Find the organization you want to edit and then click **Edit**.

Alternatively, you can search for the organization.

4. Make any edits you'd like.

Your updates are saved automatically, so when you are finished you can simply navigate away.

To delete an organization

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **Organizations**.
3. Find the organization you want to edit and then click **Edit**.

Alternatively, you can search for the organization.

4. Click **Organization options** in the bottom toolbar, then select **Delete**.

Note: In Zendesk Classic, click **Delete** at the bottom of the organization profile.

5. Confirm that you want to delete the organization.

Any users you assigned to the organization will no longer be assigned (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 your Zendesk or later by editing their profile. You can also include users' organizations when importing new users into your Zendesk in a bulk import operation.

To add a user to an organization

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **End-users** (or **Administrators**, or **Agents**).
3. Find the user you want to edit and then click **Edit**.

Alternatively, you can search for the user.

4. Select an organization from the drop-down list under **Organization**.

Note: In Zendesk Classic, enter an **Organization**, then click **Update**.

Your update is saved automatically, so when you are finished you can simply navigate away.

You can change the user's organization at any time by editing their profile. End-users cannot change their own organization (administrators 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. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.

Note: In Zendesk Classic, select the **Manage** menu, then select **People**.

2. Click **Agents**.
3. Find the agent you want to edit and then click **Edit**.

Alternatively, you can search for the agent.

4. Select an organization from the drop-down list under **Organization** and in **Access**, select **Tickets requested by users in this agent's organization**.

Note: In Zendesk Classic, enter an **Organization**, then, in the roles section, select **Allow access to tickets in end-user's organization**. Click **Update**.

Your update is saved automatically, so when you are finished you can simply navigate away.

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

Note: Notwithstanding ticket access restrictions, CC'ing an agent on any ticket lets the agent receive email notifications of all public and private updates to the ticket.

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.



View title

Unsolved tickets by organization

Meet **all** of the following conditions:

Status Solved

Organization

Add condition

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. Remove

Add condition +

MondoCAM Remove

All tickets

Organization is MondoCAM Remove

Add condition +

Adding tags to users and organizations

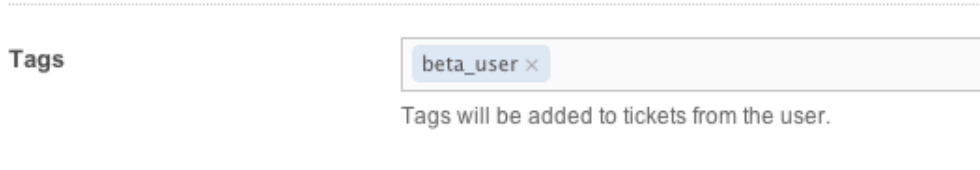
Tags can be added to users and organizations and these tags can then be used in business rules to manage the ticket workflow and to restrict access to forums.

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.

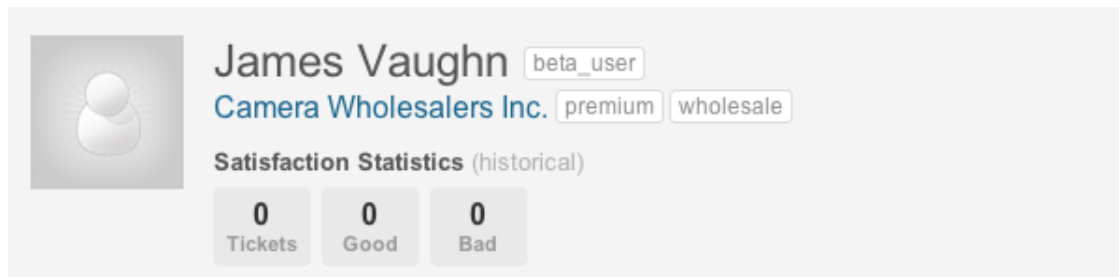
A user's tags, and the tags of the organization to which they belong, are added to their tickets. In other words, if a user is tagged with `manager` and belongs to an organization tagged with `premium`, all the user's tickets will contain both of those tags.

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 Zendesk 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, via the Zendesk API, and via enterprise single sign-on (JWT and SAML). Agents and administrators can add tags to users, but only administrators can add tags to organizations.



The user and organization tags are displayed in the user dashboard, the user widget, and in lists of users and organizations.



To manage tags

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **People**.
2. Click the **Tags** link at the top.

On this Tags 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.

Tags (7)

beta_user 4 user(s) • 0 organization(s)	remove
consumers 1 user(s) • 1 organization(s)	remove
edu 0 user(s) • 2 organization(s)	remove
faculty 1 user(s) • 0 organization(s)	remove
premium 0 user(s) • 2 organization(s)	remove
vendor 0 user(s) • 1 organization(s)	remove

User and organization tags can be referenced as placeholders and as data in Liquid markup code.

Enabling user and organization tagging

An administrator can enable user and organization tagging for your Zendesk.

To enable user and organization tagging

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Customers**.
Zendesk Classic: Select the **Settings** menu, then select **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 your Zendesk, you add tags in the user's profile page and in the organization settings page.

Tags

premium ×
wholesale ×

These tags will be applied to tickets from users in the organization. You can also restrict forum access based on tags.

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 the **Tags** page. The **Tags** page displays all the user and organization tags that have been added to your Zendesk. 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 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. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **People**.
2. Click the **Tags** link at the top.
3. Locate the tag you want to remove and then click **Remove**.
4. 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 your Zendesk 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.

Trigger title

Assign consumer tickets to Consumer Support

Meet **all** of the following conditions:

Status Is

Tags Contains at least one of the following

Add condition

Meet **any** of the following conditions:

-- Click to select condition --

Add condition

Perform these actions:

Status Open

Group Consumer Support

Add action

Delete or

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.

User property restrictions

Restrict access to organization

(None) ▾

Restrict access to end-users and organizations with all of the following tags

premium ×

3. Click **Update Forum**.

Only these users and organizations will see the forum when they are logged in to your Web portal. In the example above, all of the 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 your Zendesk, 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
```

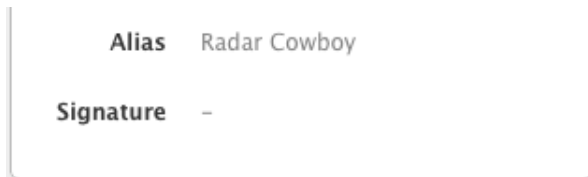
To search for user tags, you can do this:

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

Adding an agent alias (Plus and Enterprise)

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

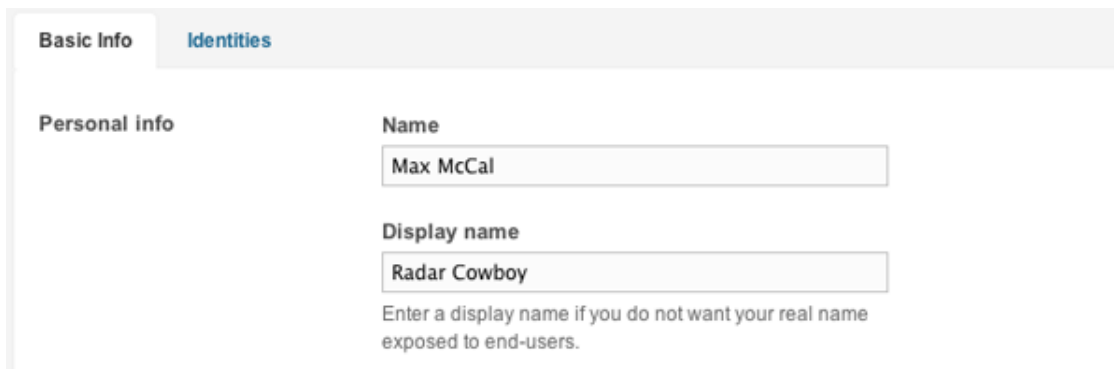
Administrators and agents can create their own alias by editing their profiles.



Alias Radar Cowboy

Signature -

Zendesk Classic: Alias is called display name. What you set as the display name is shown as the agent's alias in the new version of Zendesk.



Basic Info Identities

Personal info

Name
Max McCal

Display name
Radar Cowboy

Enter a display name if you do not want your real name exposed to end-users.

The alias field is only shown if personalized email replies is also enabled (see [Enabling personalized email replies](#)). This is done by an administrator.

To enable personalized email replies

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Settings** menu, then select **Channels > Email > Edit**.
2. Select **Personalized email replies > Enable**.
3. Click **Save**.

To add an alias

- To add an alias to another agent's account or your own, you simply edit the Alias field in the user profile. See [Updating your user profile](#) in the Zendesk Agent Guide.

Once an agent adds an alias, 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. Aliases are only visible to end-users, not other agents.

Assuming users (Zendesk Classic)

Administrators have the ability to sign in as another user. This is referred to as assuming a user and it can be useful in troubleshooting issues users are having when using your Zendesk.

Note: Assuming users is not currently available in new version of Zendesk, only Zendesk Classic.

To assume (sign in as) another user

1. Select the **Manage** menu, then select **People**.
2. Search for the user you want to assume; or select the **End-users**, **Agents**, or **Admins** category and locate the user.
3. Click **Assume**. You are immediately logged in as the user and can navigate around their view of your Zendesk as needed.
4. When you're done, click **Revert Identity** (this command is in the upper right corner, 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 your Zendesk from the perspective of an end-user who has not logged in. This can be useful as a quick way of checking your Web portal customizations. For example, you can see which forums in your knowledge base are public, confirm that you've set up a Feedback Tab properly, and take a look at the submit form after you've modified ticket fields.

To assume an anonymous user

1. Select the **Manage** menu, then select **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, near the **Login** and **Sign up** commands).

Custom agent roles (Enterprise)

In the Enterprise version of Zendesk, you can define your own agent roles and assign those roles to any agent in your Zendesk. 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.


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 your Zendesk 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 your Zendesk. 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 Zendesk, 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. Click the **Manage** icon () in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **People**.
2. Select **Roles**.

All of the agent roles (predefined and custom roles, if any) are displayed.

The screenshot shows a 'Roles (6)' section with the following roles listed:

- Advisor (0)**: Advisors manage the workflow and configure the help desk. They create or manage automations, macros, triggers, views, and SLA targets. They also set up channels and extensions. Advisors don't solve tickets, they can only make private comments. (Buttons: clone, edit)
- Light Agent (0)**: 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 (0)**: 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. (Button: edit)
- Team Leader (0)**: 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. (Button: edit)
- Legacy Agent (1)**: 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. This role will disappear after all its members have been assigned to other roles.
- Administrator (2)**: Manages the help desk with regard to rules, users, organizations, groups and SLAs. Has access to all tickets.

3. 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).
4. Define and create the agent role as described below in [Agent permissions](#).
5. When you've finished defining the new role, click **Create Role**.

To add a new custom agent role

1. Click the **Manage** icon (⚙️) in the sidebar, then select **People**.
Zendesk Classic: Select the **Manage** menu, then select **People**.
2. Select **Add role**.
3. Enter a role name and description and then select the permissions for the role (described below).
4. Click **Create role**.

Agent permissions

You create agent roles by choosing the permissions described in the following table.

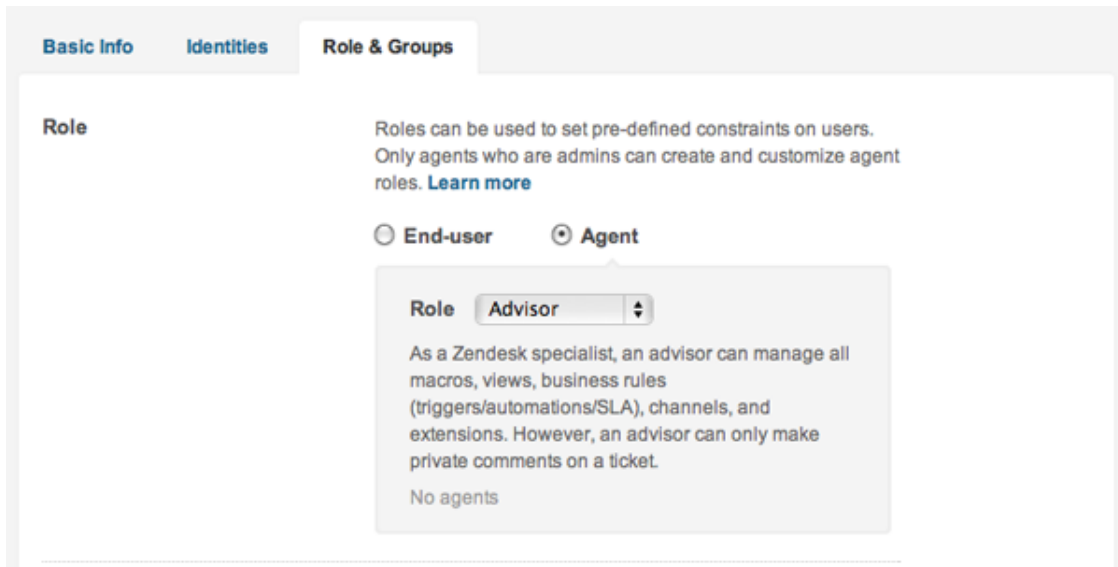
Permissions	Description
Tickets	You can define an agent's access to tickets, the types of comments they can make, and their editing permissions.

Permissions	Description
	<p>An agent may access tickets in one of the following ways:</p> <ul style="list-style-type: none"> • Assigned to this agent only • Requested by users in this agent's organization • All within this agent's group(s) • All, including suspended tickets <p>Notwithstanding ticket access restrictions, CC'ing an agent (including a Light Agent) on any ticket lets the agent receive email notifications of all public and private updates to the ticket.</p> <p>Agents can add ticket comments in one of the following ways:</p> <ul style="list-style-type: none"> • Private only • Public and private <p>In addition, you can grant agents permission to do any of the following:</p> <ul style="list-style-type: none"> • Can edit ticket properties • Can delete tickets • Can merge tickets • Can edit ticket tags <p>Note: In the Enterprise version, the ability to delete tickets has been moved from the Agents settings page and is now an agent-level permission.</p>
Tools	<p>The Tools section includes access and editing permissions for views, reports, and macros. One option can be selected for each.</p> <p>Reports:</p> <ul style="list-style-type: none"> • Cannot view • Can view only • Can view, add and edit <p>Views:</p> <ul style="list-style-type: none"> • See views only • Add and edit personal views • Add and edit personal and group views • Add and edit personal, group and global views <p>Macros:</p> <ul style="list-style-type: none"> • 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	<p>There's one permission for viewing and editing end-user profiles. One of the following options can be selected:</p> <ul style="list-style-type: none"> • View only

Permissions	Description
	<ul style="list-style-type: none"> • Add and edit within their organization • Add and edit all • Add, edit and change password for all <p>End-user editing rights enables the agent to verify and assume end-users. Only administrators can change a user's role.</p>
Forums	<p>Viewing and editing of forums can be set to one of the following:</p> <ul style="list-style-type: none"> • Add topics in unrestricted forums only • Add and edit topics in all forums (moderator) • Add, edit and reorder all forums content <p>All forums content includes comments, topics, forums, and categories.</p> <p>Selecting Can access organization-restricted forums allows the agent to access and edit forums restricted to an organization.</p>
Channels	<p>Depending on the channels that have been enabled for your account, agents may also be allowed to do any of the following:</p> <ul style="list-style-type: none"> • Can answer chat requests • Can access Twitter functionality • Can answer phone calls
System	<p>The following two options allow the agent to create and edit triggers, automations, and SLA targets and to manage channels and extensions.</p> <ul style="list-style-type: none"> • Can manage business rules • Can manage channels and extensions <p>Channels are modes of communication such as chat, email, and twitter. Extensions includes integrations and widgets.</p>

Assigning Enterprise agent roles

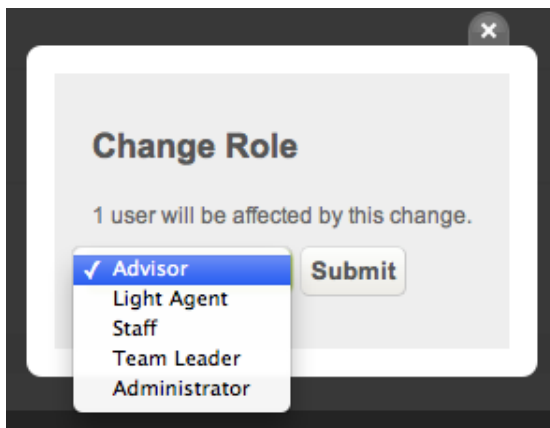
You can assign a role to an agent by editing their profile or you can select more than one agent and assign them all at once. The agent roles are displayed in a drop down list in the user profile.



On the **People** page 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.

What is a light agent? (Enterprise)

All Enterprise customers may create an unlimited number of light agents at no additional charge. The primary purpose of this role is to be kept informed about tickets and to, when needed, provide subject matter expertise and advice by adding private comments to tickets assigned to the groups to that the light agent belongs to.

The light agent role has the following access and permissions.

Tickets

- Light agents can view either all tickets or just tickets that are assigned to his/her group(s).
Note: For a light agent to have access to all tickets within your Zendesk, they must be added to every group.
- Light agents can only make private comments (no public comments are allowed).
- Light agents cannot be assigned to tickets and therefore cannot edit any of the ticket properties.

Tickets

What kind of tickets can this agent access?

All within this agent's group(s)



Please make sure that every agent in this role belongs to a group.

What type of comments can this agent make?

Private only

Can edit ticket properties

Enables the agent to edit properties for any accessible ticket. Without this permission, the agent cannot be assigned to a ticket.

People

- Light agents can only view end-user and agent profiles. They cannot edit those profiles, assume a user, or change passwords.

People

What can this agent do with end-user profiles?

View only

End-user editing rights enable the agent to verify and assume end-users. Note that only admins can change a user's role.

Forums

- Light agents can access all forums except those that have been restricted to a group or organization that they do not belong to.
- Light agents can add topics to the forums they have access to.

Forums

What can this agent do in forums?

Add topics in unrestricted forums only

The third option provides the ability to edit any topics, forums, and categories. A category is a collection of forums, which are collections of topics.

Can access organization-restricted forums

By default, forums restricted to an organization are only accessible by members of that organization.

Tools: reports, views, and macros

- Light agents can view all standard reports in Zendesk (this does not include GoodData reports). They cannot create or edit a report.
- Light agents can access all views. They cannot create or edit views.
- Light agents have no access to macros since they cannot create or update tickets.

Tools

What can this agent do with reports?

Can view only

Data export capabilities is included with the ability to edit reports.

What can this agent do with views?

See views only

Views define preset conditions for a collection of tickets. Views can be personal, for group(s) or the entire help desk.

What can this agent do with macros?

Cannot add or edit

Macros apply pre-defined actions to a ticket. Macros can be personal, for group(s) or the entire help desk.

Channels and system

Light agents have no access to channels or business rules (automations, triggers, SLA targets) or extensions.

Chapter

3

User access, log in, and security

- *Security best practices*
- *Configuring how end-users access and log in to your Zendesk*
- *Setting the password security level for your Zendesk*
- *Managing end-user settings*
- *Verifying a user's email address*
- *Providing secure communications with SSL*
- *Setting up an open Zendesk*
- *Setting up a closed Zendesk*
- *Setting up a restricted Zendesk*
- *Restricting access to your Zendesk using IP restrictions (Enterprise)*
- *Single sign-on (SSO) options in Zendesk*
- *Enabling social media single sign-on*
- *Setting up single sign-on with JWT (JSON Web Token)*
- *Using SAML for single sign-on (Plus and Enterprise)*
- *Setting up SAML single sign-on with Okta (Plus and Enterprise)*

Security best practices

More than 25,000 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).

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.

Increase password security

Zendesk provides three levels of password security: low, medium, and high. An administrator can set password security.

Increasing your password security can help to prevent unauthorized users from guessing your agents' passwords. At the highest level of security, your users are required to choose a new password every 90 days. For more information, see [Setting the password security level for your Zendesk](#).

To set password security

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Click the **Password Policy** tab.
3. Select one of the security options, then click **Save tab**.

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.

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 Zendesk. 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 Active Directory, Open Directory, 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.

Limit the number of agents with administrator access

Administrators have access to parts of your Zendesk 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 your Zendesk that the agent role can access. These permissions however are limited to the user, ticket, forum, and workflow management parts of Zendesk. Only account owners and administrators have access, for example, to security settings.

If you're concerned about your agents accessing information about your end-users, you can create a role that does not allow them to edit end-user profiles or view the list of all your end-users. To prevent that access, set the following two permissions:

- **What access does this agent have to end-user profiles?** Set to **Read-only**.
- **May this user view lists of user profiles?** Set to **Cannot browse or search end-users**.

For more information, see [Custom agent roles](#).

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 **People** page 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, make sure that email address is legitimate. See [Archiving email notifications](#).

- Make sure that the URL to your logo in the **Branding** page is correct and has not been changed.
- Verify that all targets you use 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.

Monitor account audit logs

In the Enterprise version of Zendesk you can monitor various account, user, business rule changes, and ticket deletion using the Audit log. This provides you with a way to track many of the important changes to your account. For more information, see [Viewing the Audit log for account, user, and business rule changes](#).

Remotely authenticate users with single sign-on

In addition to the user authentication provided by Zendesk, you can also use single sign-on, which authenticates your users outside of your Zendesk. There are two types: social media single sign-on and enterprise single sign-on.

Social media single sign-on are additional login options that you can provide for your customers convenience. For example, you can make the Facebook, Google, and Twitter logins available on your web portal login page. Your customers can then log in with either their Zendesk account or one of their social media accounts.

Enterprise single sign-on is different than social media single sign-on. Instead of being optional and in addition to the Zendesk account login, enterprise single sign-on replaces all other login options. After it's been enabled for your Zendesk account, your customers do not see or use your web portal log in page. Instead, they typically log in to a corporate network and then access Zendesk by simply clicking a link (to Support, for example) and are automatically logged in. All user management and authentication happens outside of your Zendesk. Offered in all Zendesk plans is single sign-on using JSON Web Token (JWT). The Plus and Enterprise plans support single sign-on using Secure Assertion Markup Language (SAML).

In both cases, providing single sign-on to your users via enterprise single sign-on or via social media single sign-on, we recommend that you and your users take advantage of the two-factor authentication (also known as multi-factor authentication) that these services provide. This adds another layer of protection by requiring additional proof of identity. If you're using JWT or SAML, you'll need set this up for your Zendesk. For social media single sign-on, your users will need to set this up themselves. All of these services provide the documentation needed to set it up.

For more information about single sign-on, see the following:

- [Enabling social media single sign-on](#)
- [Setting up single sign-on with JWT \(JSON Web Token\)](#)
- [Using SAML for single sign-on \(Plus and Enterprise\)](#)

Restrict access to your Zendesk using IP restrictions

In the Enterprise version of Zendesk, an administrator can restrict access to specific IP addresses. This means that only users from the IP addresses that you manually add to your account are allowed to sign in to your Zendesk.

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.

To set IP restrictions

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Select the **Access Restriction** tab.
3. Select **Enable**, then enter the **IP Ranges** you want to restrict.
4. Click **Save tab**.

For more information about this feature, see [Restricting access to your Zendesk](#).

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 Zendesk are encrypted and customers are directed to a secure HTTPS site, e.g. <https://youraccount.zendesk.com>. For more information, see [Providing secure communications with SSL](#).

By default, SSL is on for new accounts. If you're not currently using SSL and want to, an administrator can enable 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.

To turn SSL on for your account

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Select the **SSL** tab.
3. Select **Enable**.
4. Click **Save tab**.

Follow secure coding best practices when extending your Zendesk

You can extend the functionality of your Zendesk by creating widgets (in Zendesk Classic) and Apps (in new Zendesk). When doing so, we strongly recommend that you follow secure coding best practices. A good reference for this is the Open Web Application Security Project (OWASP), which you can find [here \(https://www.owasp.org/index.php/Main_Page\)](https://www.owasp.org/index.php/Main_Page).

Configuring how end-users access and log in to your Zendesk

One of the steps in setting up your Zendesk is deciding who you will allow to use it. Based on the type of support you provide, you may allow anyone to access your Zendesk and submit support requests or you may limit access to a select group of users. You can configure your Zendesk for either scenario and also control many other factors in determining who is allowed to use your Zendesk.

You'll need to configure end-user access, registration, and log-in options.



Zendesk provides you with a lot of flexibility in all three of these areas and the following sections explain each in detail.

Access

You have internal and external users. Your agents and other support staff are your internal users. Your end-users are the people to whom you provide support and whose tickets you manage in Zendesk. These are your external users. While your support staff must log in to your Zendesk, your end-users may not have to depending on how you set up access to your Zendesk.

You can also restrict the external users who can access your Zendesk. For example, you might want to allow only end-users from a specific email domain and then reject all others.

You can set up your Zendesk access to be completely open to all users, restrict it to a specific group or groups of users, or close your Zendesk and only allow the users you add to your Zendesk.

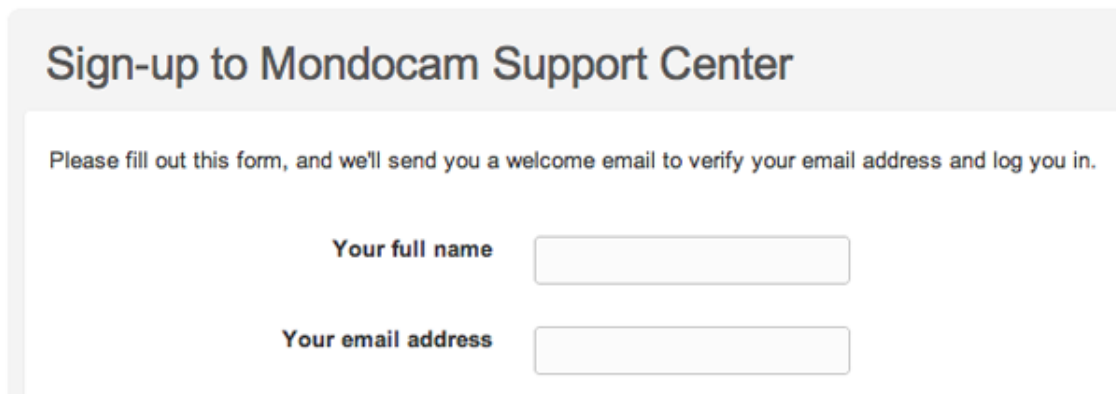
- **Open** means that everyone can see your Zendesk web portal and submit support requests. This is the configuration you'd choose if you, for example, sell products and provide support to the general public. A user submits a support request and a new user account is created in your Zendesk.
- **Closed** means your Zendesk web portal is visible to everyone but only the users that you add to your Zendesk account can log in and submit support requests. Each user's account must be created before they can submit support requests and logging in is required. This is typically how an in-house IT help desk would configure their Zendesk.
- **Restricted** means that your Zendesk is visible to all users but only users with email addresses in domains that you approve are able to successfully submit support requests. All other users' requests are rejected. This configuration allows you restrict access to your Zendesk but also allows your users to request support without first having been added to your Zendesk, as is the case with a closed Zendesk.

Setting up your Zendesk for all three options is described in the following topics:

- [Setting up an open Zendesk](#)
- [Setting up a closed Zendesk](#)
- [Setting up a restricted Zendesk](#)

Registration

You can require that your end-users register before they can begin a conversation with your Zendesk. This means that users must first register (sign up) with your Zendesk by providing their name and email address.



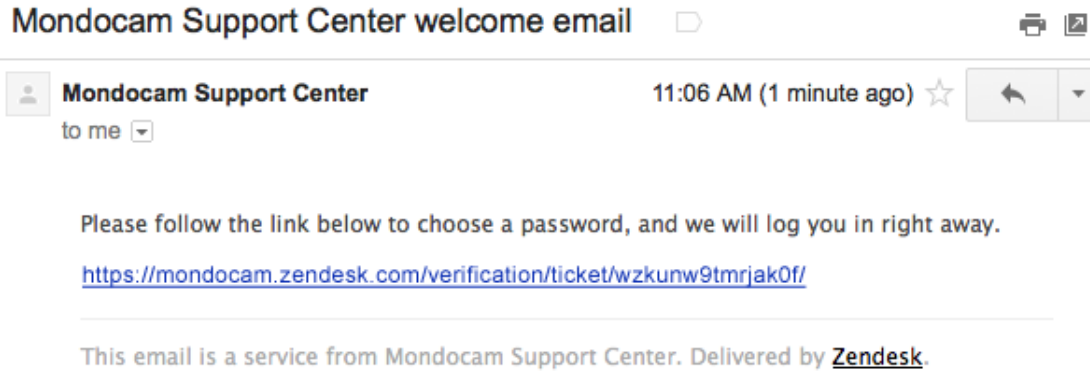
The screenshot shows a registration form with the following elements:

- Header:** "Sign-up to Mondocam Support Center"
- Instruction:** "Please fill out this form, and we'll send you a welcome email to verify your email address and log you in."
- Form Fields:**
 - Label: "Your full name" followed by a text input box.
 - Label: "Your email address" followed by a text input box.

The registration process is started when an end-user does one of the following:

- Visits your web portal and clicks **Submit a request**
- Visits your web portal and clicks **Login** for the first time and then **Sign up to submit and track your requests online**
- Sends an email support request to your support email address for the first time

After signing up, end-users receive a welcome email message that prompts them to verify their email address and also create a password so that they can log in to your Zendesk.



Important: It's important to note that when you require your end-users to register, the tickets that they submit to your Zendesk remain in limbo (i.e. not actually added to your Zendesk) until the end-user has verified their email address and created a user account.

By requiring your end-users to register, you help to ensure that the support requests you receive are legitimate and not spam. Registration is not a guarantee that spam won't get through to your Zendesk, but other tools are provided to handle those that do manage to get through. See [Managing suspended tickets and spam](#).

So what does the end-user gain by registering and logging in to your Zendesk? Doing so allows the end-user to do the following:

- Submit tickets without being prompted to provide their email address (if they're logged in to your web portal)
- Track their tickets in the web portal
- Add comments and topics to your forums (if you've set up your forums to allow this)
- Access forum content that is hidden to the general public
- Update their user profile and add additional contact information (email addresses and social media accounts) so that they can submit support requests from any of these accounts and Zendesk will pair them to their Zendesk user account.

Allowing unregistered users to submit support requests

You can still provide support to your end-users without requiring them to register and log in. They lose the benefits that registration provides but as far as your agents are concerned, the ticket workflow is the same. Many companies provide email-only support and never require their end-users to register because they don't want or need their end-users to visit and use their web portal.

Note: You can actually do both: not require registration and also allow your end-users to use your web portal. You'd do this by hiding all the login access points into your web portal and then providing a knowledge base that anyone can see. For more information about setting this up, see [Setting up to provide email-only support](#).

Even though you don't require your end-users to register, a user account is created for each of them in your Zendesk. This is required of course because Zendesk (and you) need to communicate with them via email. The user account contains their email address and other personal data. These users remain unverified in your Zendesk, which is fine since you don't require registration.

When unregistered users submit a support request, they receive an email notification informing them that their request has been received. They do not receive the new user welcome email message. And, unlike when requiring registration, the ticket is immediately added to your Zendesk.

See the following for more information about setting up your Zendesk to allow unregistered users:

- [Managing end-user settings](#)

User accounts created by agents

As we've shown above, there are a number of ways that your end-users can self-register in your Zendesk. In addition to self registration, your agents can also add end-users.

This can be done manually by agents. Administrators can bulk import a list of users using a CSV file or add users via the Zendesk API.

If you require registration, you can choose if you want the welcome email message sent to the end-users you've added. This is an admin setting called **Also send a verification email when a new user is created by an agent or administrator**. Choosing this setting prompts the end-users to verify their email and choose a password just as if they had created the user account themselves (in other words, to register with your Zendesk). If you don't require registration, you would not choose this option.

How you set up your Zendesk (as open, closed, or restricted) also affects registration, verification, and passwords. For detailed information, see the following topics:

- [Setting up an open Zendesk](#)
- [Setting up a closed Zendesk](#)
- [Setting up a restricted Zendesk](#)

Log-in

If you've decided that your end-users must log in to access your Zendesk, you need to decide how you want to authenticate your end-users so that you're assured that they are who they say they are. Zendesk provides lots of flexibility in this regard. You can use Zendesk's own user authentication (the standard login process) or you can remotely authenticate your end-users outside of Zendesk and then seamlessly log them in to your Zendesk. You can also allow your end-users to log in using popular social media such as Facebook, Google, and Twitter.

When discussing users that are authenticated outside of your Zendesk, you're going to see these terms: *single sign-on* (or SSO) and *remote authentication*. *Single sign-on* is often used interchangeably with *remote authentication*. For the sake of clarity, it's best to think of *single sign-on* as the ability for your users to log in to your Zendesk using a password from a system outside of Zendesk. That's made possible by *remote authentication*; users are authenticated outside of your Zendesk and then seamlessly logged in.

Standard Zendesk log-in

This is the user authentication that Zendesk provides and which was outlined above. You set your Zendesk account to require registration, the end-user signs up (registers) and then verifies their email address and creates a password. They then log in to your web portal using their email address and password. Zendesk takes care of authenticating the user and allowing them access to your Zendesk. You also have the option of setting the security level for passwords. All user data is contained and managed within your Zendesk account.

For more information, see the following:

- [Managing end-user settings](#)
- [Setting the password security level for your Zendesk](#)

Social media single sign-on: Facebook, Google, Twitter

In addition to the end-user's Zendesk user account log-in (email address and password), you can allow your end-users to log in to your Zendesk using their Facebook, Google, Twitter accounts.



These social media sign-in options are provided as a convenience for your end-users so that they don't need to remember yet another password to log in to your Zendesk.

The social media account, rather than Zendesk, is authorized to authenticate the end-user. Zendesk trusts Twitter, for example, to make sure that the user is who they say they are.

Note: Both Facebook and Twitter are also Zendesk channels, meaning that end-users can request support using either of these, if you've set up these channels in your Zendesk. Support requests received via these channels is not the same as logging into your Zendesk. In other words, enabling the Facebook or Twitter social sign-in is not the same as enabling these as channels in your Zendesk.

For more information, see [Enabling social media single sign-on](#).

Single sign-on with JSON Web Token (JWT)

You also have the option of creating a locally hosted custom remote authentication script that connects to your external user management system. This is possible using JSON Web Token (JWT). Single sign-on is based on a shared secret between your local authenticating script and Zendesk. This secret is used to securely generate a hash (one-way encryption) that Zendesk uses to ensure that users who log in to your account using remote authentication are who they claim to be and have been pre-approved to do so by implicitly knowing the shared secret.

For more information about JWT, see [Setting up single sign-on with JWT \(JSON Web Token\)](#).

Single sign-on with SAML (Plus and Enterprise)

If you prefer to manage your users and their log-in to your Zendesk yourself, you have the option of using identity provider services such as OneLogin, Okta, and PingIdentity. These use SAML (Secure Assertion Markup Language) and either store all your user data or connect to your enterprise user management systems such as Active Directory and LDAP.

You might set up your Zendesk log-in this way if you're using Zendesk as corporate IT help desk, for example. You have complete control over your users and they don't need a separate password to log in to your Zendesk. Instead, when users visit your Zendesk and attempt to log in, they are seamlessly redirected to your SAML server for authentication. Once authenticated, users are redirected back to your Zendesk and automatically logged in.

The only user data that is contained in your Zendesk is the user's email address or an external ID that you define.

For more information about setting up your Zendesk to use a SAML identity provider, see:

- [*Using SAML for single sign-on \(Plus and Enterprise\)*](#)

Setting the password security level for your Zendesk

Zendesk provides three levels of password security: low, medium, and high. Each level has stricter requirements for choosing passwords. Only administrators can change the password security level.

About the Zendesk password security levels

Zendesk provides the three password security levels. A security level applies to all agents and end-users. For example, you can't specify one level for end-users and another level for agents and administrators.

Low - Each password must have at least 5 characters. This is the default security level.

Medium - Each password must have at least 6 characters and meet the following requirements:

- Includes numbers and mixed case letters
- Includes a special character that is not a letter or number

High - Each password must have at least 6 characters and meet the following requirements:


- Includes numbers and mixed case letters
- Includes a special character that is not a letter or number
- The password expires after 90 days and the new password must be different from the 5 previous passwords

Note: If JWT or SAML authentication is enabled for your Zendesk, the passwords won't expire because they're not stored in Zendesk.

Changing the password security level

You must be an administrator to change the password security level. If you increase the security level, all passwords are set to expire in 5 days. End-users must change their passwords to comply with the new security level. The next time they log in, Zendesk alerts them to change their passwords. Zendesk also sends email notifications to administrators and agents three days before a password expires, and then on the day it expires.

To change the password security level

1. Click the **Manage** icon () in the sidebar, then select **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Click the **Password Policy** tab.
3. Select one of the security options, then click **Save tab**.

Allowing administrators to set passwords

Account owners can allow administrators to set passwords for users. However, Zendesk recommends that you leave this option disabled for security reasons. It prevents hackers from using social engineering techniques to deceive well-meaning people into providing confidential information. For example, one technique used by hackers is to repeatedly call or spoof-email a support center posing as a frustrated customer who forgot his or her password and who is unable to recover it, and persisting until a support agent has no choice but to change the password manually

for the irate customer. Once the password is changed, the hacker has access to confidential information.

Note: Even if the option is disabled, administrators can still reset passwords (as distinct from setting passwords). An email is sent to the user's registered email address containing a link that lets the user reset the password. For more information, see [Resetting user passwords](#).

You can also set user passwords through the API. See [Set a user's password](#) in the Zendesk API guide.

To let administrators set passwords for users

1. Log in as the account owner and click the **Manage** icon (⚙️) in the sidebar, then select **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Click the **Password Policy** tab.
3. Select the option to enable admins to set passwords, then click **Save tab**.

Password security best practices

Consider posting an article on your Zendesk web portal to remind your agents and users about password best practices. Common recommendations include:

- Never use the same password for more than one account
- Never share your password
- Never write down your password
- Never communicate your password by telephone, email, or instant messaging
- Log off before leaving a computer unattended
- Change your password whenever you suspect it's been compromised

For a good article on the subject, see [Choosing Good Passwords - A User Guide](#).

For more information on securing your private information on Zendesk, see [Security best practices](#).

Managing end-user settings


On the **Customers (End-users)** settings page, you select the settings that affect how your users access and use your Zendesk. For example, if you want your Zendesk to be available to anyone, you select the **Anybody can submit tickets** setting. This one setting and its related end-user settings determine how open or restricted your Zendesk is to your end-users.

You can configure your Zendesk end-user access for the following:

- Anybody can submit tickets and no registration or email verification is required.
- Anybody can submit tickets but you require that the user proves that they are human via image verification using CAPTCHA.
- Anybody can submit tickets but you also require registration and email address verification.
- Anybody can submit tickets but you restrict access to your Zendesk based on email domains or IP restrictions (IP restrictions is a feature available in the Enterprise version of Zendesk). In other words, you only accept registration and tickets from approved users.
- Only users you add to your Zendesk are able to submit tickets and use your web portal.

There are variations of these configurations as well. For example, you can allow anybody to submit tickets, require registration, and also restrict access using email domains or via IP restrictions. These configurations are also affected by using both social media and enterprise single sign-on (see [Single sign-on \(SSO\) options in Zendesk](#)).

To manage end-user settings

- Click the **Manage** icon () in the sidebar, then select **Settings > Customers**.
Zendesk Classic: Select the **Settings** menu, then select **End-users**.

Selecting who can submit tickets

The **Anybody can submit tickets** setting is one of the most important end-user settings because it determines which users can access and use your Zendesk. You can allow anybody to use your Zendesk, close it to all but the users you add, or restrict the use of your Zendesk to just users from specific email domains or within a range of IP addresses. These configuration options are referred to as *open*, *closed*, and *restricted* and are explained in detail in the following topics:

- [Setting up an open Zendesk](#)
- [Setting up a closed Zendesk](#)
- [Setting up a restricted Zendesk](#)

Controlling spam tickets with image verification using CAPTCHA

Allowing anybody to submit tickets might lead to some spam email appearing as tickets in your Zendesk. Requiring users who are not registered and logged in to complete image verification before they can submit a ticket goes a long way to prevent spam. By enabling the CAPTCHA setting, you require your users to enter the words presented by CAPTCHA to prove that they are human when filling out the support request form.

Note: CAPTCHA is only added to the web portal support request form. It is not also added to the Feedback Tab.

CAPTCHA is included on the **Sign Up** page by default, and cannot be disabled.

Requiring that your users register to use your Zendesk

The default configuration of the Zendesk web portal is that the **Sign Up** page is displayed and that your users have the option of registering and creating a user account in your Zendesk. If you enable the **Ask users to register** option, you are *requiring* that your users sign up and create an account. To create an account, the user's email address must be verified. Until it is, any support requests they made (via the support request web form, the Feedback Tab, or email) will be held in limbo (in other words, not added to your Zendesk views).

The registration process, and the advantages to the user of requiring registration, are explained in [Registration](#).

Note: If you don't want users to register, you can hide the **Sign Up** page. For more information, see [Hiding end-user access links in the web portal](#).

Controlling access to your Zendesk with the email whitelist and blacklist

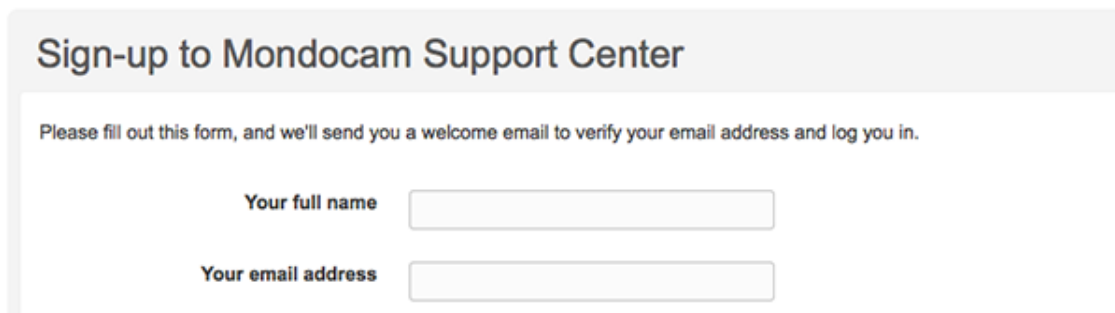
The email whitelist and blacklist, shown when you select **Anybody can submit tickets**, are used to restrict access to your Zendesk. For example, you can accept user registrations and support from users who have email addresses in the email domains you add to the whitelist. You can then reject all other users by adding an asterisk (*) to the blacklist. If you're not setting up a restricted Zendesk, leave both the whitelist and blacklist blank.

The whitelist and blacklist are explained in more detail in [Setting up a restricted Zendesk](#).

As mentioned above, you can also restrict access using IP restrictions. This is a feature available in the Enterprise version of Zendesk. For more information, see [Restricting access to your Zendesk using IP restrictions](#).

Registration message and verification email notifications

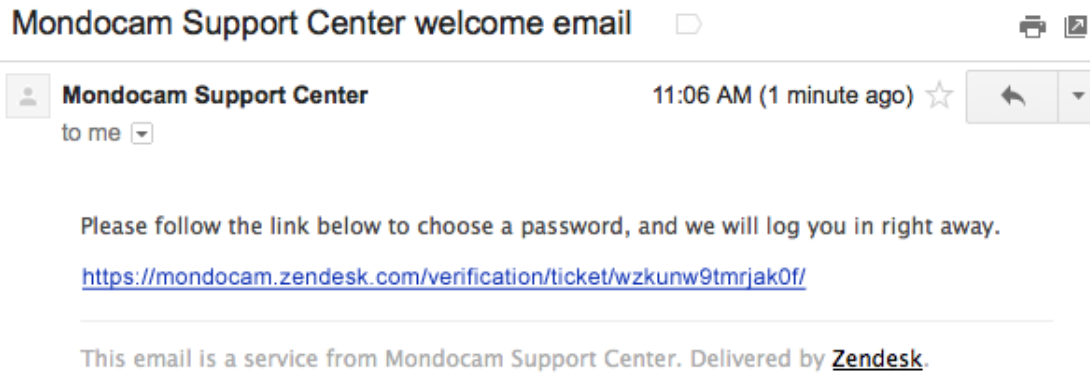
The **Sign Up** page in the web portal contains a message prompting users to fill out the registration form.



The screenshot shows a registration form titled "Sign-up to Mondocam Support Center". Below the title is a grey header bar. Underneath, a message reads: "Please fill out this form, and we'll send you a welcome email to verify your email address and log you in." The form contains two input fields: "Your full name" and "Your email address", each with a corresponding text box.

You can customize this message on the **Customers (End-users)** settings page by editing the **User registration message**. You can also add dynamic content to this message. For more information, see [Providing multiple language support with dynamic content](#).

When your users register, they receive a welcome email message (called the **User welcome email**) that prompts them to verify their email address, which then prompts them to create a password so that they can log in to your web portal.



Users receive a similar email message (called the **Email verification email**) when they add secondary email addresses to their user profiles. Both of these messages can be customized and both support dynamic content.

Note: Both of these email messages (the **User welcome email** and the **Email verification email**) are sent to your users when they register, submit a ticket for the first time, or add secondary email addresses.

Sending the email verification message to users you add

You have the option of sending the verification email when you add users to your Zendesk by enabling the **Also send a verification email when a new user is created by an agent or administrator** setting. This is the same email message shown in the previous section. When you add a user yourself, you'll probably also want the user to verify their own email address and then create a password so that they can log in to your Zendesk. But of course with the many access, registration, and login options, including single sign-on, available in Zendesk you may not want to enable this setting.

Please refer to the following topics for a more detailed description of the use of this setting:

- [Setting up a closed Zendesk](#)
- [Setting up a restricted Zendesk](#)

Allowing your end-users to edit their profiles and change their passwords

The **Allow users to view and edit their profile data** setting is enabled by default and allows your users to add information to their user profiles. For example, they can add secondary email addresses, their Twitter account, and so on. You should disable this option if you use remote authentication because your user data is handled outside of your Zendesk.

The **Allow users to change their password** setting is also selected by default. You normally want your users to be able to change their own passwords. But like the **Allow users to view and edit their profile data** setting, you'll want to disable this if you administer users and passwords in another system and use remote authentication.

Enabling user tagging

Enabling user tagging allows you to add tags to a user's profile. These tags are then added to the user's tickets, which you can then use to control your workflow. For example, you can use a tag to escalate a specific user's tickets.

The user does not see the tags that have been added to their profile.

For more information, see [Adding tags to users and organizations](#).

Verifying a user's email address

If your Zendesk is configured to require users to register, each user must create an account in your Zendesk, verify their email address, and also create a password. The password is required if they want to log in your web portal to submit support requests, use the parts of your knowledge base that have been restricted to logged-in users only, or to track their support requests. Until their email has been verified, their support requests remain in limbo (in other words, not added to your views and agents cannot work on them). You want your users to verify their own email addresses so that you ensure they are who they say they are.

It's also possible for agents and admins to verify a user's email address on their behalf. We recommend that your users verify their own email addresses, but there are several instances where you may want to do that for them.

- **Testing** - You may be testing your workflow and want to create a number of test users and create tickets to test automations and triggers. You can add some test users for email accounts that you own and then easily verify those new users.
- **Adding agents** - Perhaps you're adding new agents to your account. Since you know that their email addresses are legitimate, you can verify them as you add them.
- **Other known users** - If you need to add an end-user who's email address you know to be legitimate, you can verify them as you add them.

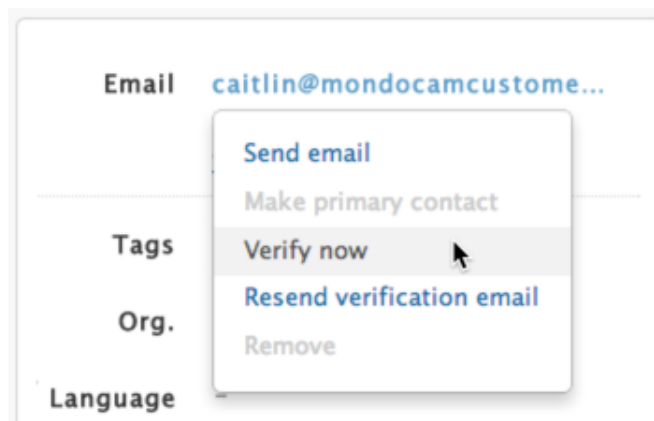
You can probably think of a number of other reasons why manually verifying a user's email address is useful and safe to you.

It's also possible to verify user email addresses when adding them to your Zendesk via the API. For more information, see [Zendesk API: Users](#).

Agents can only add and therefore verify end-user accounts. Admins can do this for all users except the account owner.

To manually verify a user's email address

- Add the user to your Zendesk (see [Adding and managing end-users](#)). Agents can do this manually in the agent interface and admins can add users via a bulk import and using the Zendesk API.
- Edit the new or an existing user's profile.
- Click the down arrow next to the users' email address and select **Verify Now**.



Zendesk Classic: Select **Manage > People** and locate the user. Click the user's name, then click **Verify Now**, which is located below the user's email address under **Contact Information**.

The user's email address is immediately verified. If the user has submitted any support requests, those requests will now be added as tickets to your Zendesk.

Notice also that you can choose **Resend email verification**. You might use this if a user has registered themselves but tells you that they haven't received the verification email. Select this to resend the email so that the user can verify their own email address.

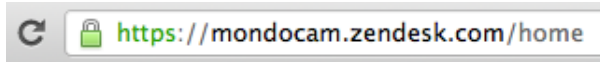
About user passwords

After the user's email address has been verified, if you require users to register, as noted above, the user's support requests are not blocked and appear as tickets in your Zendesk. If you also want your users to be able to log in to your web portal, each user needs a password. Like email verification, it's preferable that the user creates their own password. However, there are two ways that you can create passwords for them. You can do this using the API or an admin can do it manually if you've configured your Zendesk to allow this.

Adding users via the Zendesk API is described in [Zendesk API: Users](#). The account owner can enable admins to be able to set user passwords manually, follow the steps in [Allowing administrators to set passwords](#).

Providing secure communications with SSL

SSL (Secure Socket Layer) is an encryption protocol that ensures secure communications with your Zendesk web portal. SSL is enabled by default for all Zendesk subdomains except for Starter accounts. SSL can give your customers an added sense of security. The secure connection is indicated in the customer's browser by https (for HTTP Secure) in the URL and by a padlock icon in the address bar. For example, the address of your Zendesk web portal might look as follows depending on the browser:




To learn more about SSL, see [Secure Sockets Layer \(SSL\) Explained](#) on the DigiCert site.

For more ways to increase the security of your Zendesk, see [Security best practices](#).

Using SSL

SSL is enabled by default in Zendesk. You have the option of turning off SSL so that communications with your web portal are no longer encrypted. While using SSL is not a requirement, it is a best practice.

To disable SSL for your account

1. Click the **Manage** icon () in the sidebar, then select **Security** in the Settings category.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Select the **SSL** tab.
3. Deselect the **Enable** option.
4. Click **Save tab**.

Using hosted SSL

If you change the subdomain of your Zendesk from zendesk.com to your own subdomain, our SSL certificate no longer applies. Hosted SSL is an alternative solution for Plus and Enterprise accounts. For example, if you change the address of your Zendesk portal from mondocam.zendesk.com to support.mondocam.com without setting up hosted SSL, your customers may experience certificate errors or be redirected to your zendesk.com subdomain.

Setting up hosted SSL consists of obtaining a SSL certificate from a certificate authority and then sending it to us to install on our servers. For details, see [Changing the address of your web portal \(host mapping\)](#) *Changing the address of your web portal (host mapping)*.

Note: Hosted SSL is not supported on Trial or Regular accounts.

Setting up an open Zendesk

As described in [Configuring how end-users access and log in to your Zendesk](#), you can configure your Zendesk to be *open*, *closed*, or *restricted*. An open Zendesk means that you do not restrict any users from submitting support requests and interacting with your Zendesk. You have the option of also requiring your users to register, which means that each user needs to verify their email address and create a user account and select a password. You may want to require registration if you want to reduce the potential for spam tickets and to verify that the email address used to submit a ticket is from a real person.

Note: Zendesk detects most spam email messages and places them in the Suspended Tickets view so that you can delete or recover them. See [Viewing, recovering, and deleting suspended tickets](#) in the Zendesk Agent Guide.

Not requiring registration means that all of your users are *unverified* (users are not prompted to verify their email addresses), which is fine if you don't need or want your users to visit and use your web portal (for example, see [Setting up to provide email-only support](#)). Registered users are *verified*, meaning that they (or you) have verified their email addresses and user accounts have been created.

Even though you don't require users to register, your users still have the option of registering and creating a login to use your web portal unless you modify your web portal to hide the **Sign Up** and **Login** pages. See [Hiding end-user access links in the web portal](#).

So, in an open Zendesk you have both options: registered or unregistered end-users. You can add users or they can add themselves.


To place restrictions on who can access and use your Zendesk, see the following topics:

- [Setting up a closed Zendesk](#)
- [Setting up a restricted Zendesk](#)

Anybody can submit tickets, no registration required


If you don't require registration, you can set up your open Zendesk by following these instructions.

To allow anybody to submit tickets, no registration required

- Click the **Manage** icon () in the sidebar, then select **Settings > Customers**.
 - Zendesk Classic:** Select the **Settings** menu, then select **End-users**.
- Select **Anybody can submit tickets**
- Do not select **Ask users to register**.
- Click **Save Tab**.

If you don't require registration, users do not receive the welcome email, which prompts them to verify their email address and create a password so that they can log in to your web portal. Instead, they immediately receive the support request received email notification:


Request received: Lost my user manual Inbox x

 **Mondocam Support** 3:19 PM (3 minutes ago) ☆
to me ▾ ↩ ▾

##- Please type your reply above this line -##

Your request ([#1894](#)) has been received and is being reviewed by our support staff.

To add additional comments, reply to this email or click the link below:
<http://mondocam.zendesk.com/tickets/1894>

 **Adeyoung**
Mar 11 15:19 (PDT)

I lost my user manual. Can you send me a new one?

If you don't want your users to visit your web portal, because you provide support via email only for example, you can remove the link to the ticket that is contained in the triggers that are used to send email notifications when tickets are received and updated. For more information, see [Removing placeholders that contain URLs from your notification triggers](#).

The entire ticket lifecycle (from new ticket to solved ticket) can happen via email messages between the user and the agent. For example, if the user responds to the support request received email message, a new comment is added to the ticket.

If you leave the ticket link in the email notifications, the user has the option of clicking the link to register and create a password so that they can log in and use your web portal and track their existing tickets, submit new support requests, and so on.

Anybody can submit tickets, registration required

When you require your users to register, the support request workflow changes. Rather than the user's support request immediately becoming a ticket in your Zendesk, it is held in limbo until the users (or you) have verified their email address. After verification, the ticket is added to your Zendesk.

Note: Verifying users is described in [Verifying a user's email address](#).

The registration workflow is described in [Registration](#).

To allow anybody to submit tickets and require registration

- Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Customers**.
Zendesk Classic: Select the **Settings** menu, then select **End-users**.
- Select **Anybody can submit tickets**
- Select **Ask users to register**.
- Click **Save Tab**.

Setting up a closed Zendesk

When you set up your Zendesk, you have the option of either allowing anyone access to it or restricting access to just the users you choose. This article describes how to set up your Zendesk as a *closed* Zendesk. This means your Zendesk web portal is visible to everyone but only the users that you add to your Zendesk account can submit support requests and, optionally, view your knowledge base.

Disabling the 'Anyone can submit tickets' option

In a closed Zendesk you disable the option to allow anyone to submit tickets. This means that you have complete control over who uses your Zendesk. Typically, you'll set up your Zendesk in this way by adding all your users yourself. Although, there is a way for an anonymous user (someone not already added to your Zendesk) to still submit support requests and have your agents approve of the request, add the user to your Zendesk, and add the support request as a ticket to your queue (see [When anonymous users submit support requests](#)).

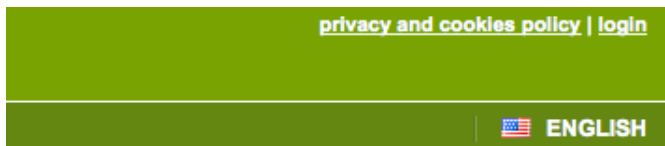
To disable the 'Anyone can submit tickets' option

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Customers**.
Zendesk Classic: Select **Settings > End-users**.
2. If it's selected, unselected the **Anybody can submit tickets** option.
3. Optionally, in the **User welcome email** section, select the **Also send a verification email when a new user is created by an agent or administrator** option.

This option is explained in more detail in [About new user email address verification and passwords](#) below so you can decide if you want to enable it.

4. Click **Save tab**.

The settings you've just made removes the **Sign Up** link from the header of your Zendesk web portal, leaving the **Login** link.



This means that users who access your Zendesk have no option for self registering (signing up and creating an account). This includes your agents as well. You need to add all your users yourself.

If you also restrict all your forums to either agents or logged in users only (see [Restricting your forums to registered users only](#) below), the only page that visitors see when they access your web portal is the login page and if they don't already have a user account in your Zendesk, they are unable to log in.

Important: When you disable the **Anyone can submit tickets** setting, you cannot use Feedback Tabs with your Zendesk. This is because Feedback Tabs do not require users to log in and be authenticated before submitting support requests or searching your knowledge base. In other words, they are publicly accessible, which is why they are disabled when you change this setting. This is the

same for the Chat feature because it's included in the Feedback Tab. Your users will be able to chat with your agents from a ticket when they are logged in to your web portal.

Adding users to your closed Zendesk

When you close your Zendesk and restrict it to only users you add, you need to add the users yourself. Here are the following ways you can add users:

- Manually adding users one at a time (see [Adding and managing users](#))
- Adding many users in a bulk import (see [Bulk importing users and organizations](#))
- Adding users via the Zendesk API (see [Zendesk API: Users](#))

The following section explains how email verification works and how user passwords are created when adding users.

About new user email address verification and passwords

A closed Zendesk requires users to be verified and registered and have log-in credentials (an email address and password). Every user's email address must be verified so that their support requests are processed and added as tickets in your Zendesk.

Since you're adding your users yourself, rather than allowing them to sign themselves up, you need to think about how the verification process happens. This is where the **Also send a verification email when a new user is created by an agent or administrator** option needs to be considered. If you set this option, all users you add to your Zendesk receive the verification email message, which prompts them to click a link to verify their email address and then create a password so that they can log in to your Zendesk. All users in a closed Zendesk must have a user account and a verified email address to submit support requests via email. If you want them to be able to log in to your Web portal, they each need a password. So by enabling this option you're asking your users to manage email address verification and create passwords themselves.

If you don't want your users to receive the verification email message, you don't set the **Also send a verification email when a new user is created by an agent or administrator** option. But, if you do that, you have the problem of your users' email addresses not being verified, which means that they can't create passwords and log in to your Web portal and if they do send you email support requests those requests remain in limbo (in other words, not added to your views and agents cannot work on them).

When you add your users, you have the following options for email verification and passwords if you elect not to send the verification email message.

- You can tell your users to just send support requests via email using your support email address (for example, support@mycompany.zendesk.com). The first time a user sends a support request via email, the verification email message is sent. This is because you've already added the user and when the support request email is received by Zendesk the user's email address is recognized. After the user verifies their email address, the support request becomes a ticket and then appears in your Zendesk.

Note: This will not happen when you receive email support requests from anonymous users (see [When anonymous users submit support requests](#)).

- Using the Zendesk API, it's possible to both add new users and to also set their passwords. You can automatically verify all your users' email addresses using the API `verified` parameter. This means that your users will be fully registered and verified and their email support requests will immediately appear in your Zendesk. Assuming you also provide them

with their passwords, they can immediately log in to your web portal. For more information, see [Zendesk API: Users](#).

- You can manually verify a user's email address after you've added them to your Zendesk. See [Verifying a user's email address](#) in the Zendesk Agent Guide.

When anonymous users submit support requests

Despite your Zendesk being closed, it is possible for an agent to create a ticket from a support request from an anonymous user. When you receive a support request from an anonymous user, when you've configured your Zendesk as closed, the request is added to the **Suspended Tickets** view. From there an agent can either delete the request or recover it. Recovering the ticket creates a new user account and adds the ticket to your Zendesk. For more information, see [Viewing, recovering, and deleting suspended tickets](#) in the Zendesk Agent Guide.

If the **Also send a verification email when a new user is created by an agent or administrator** option has been selected, the email verification email is sent to the user. The user clicks the link to verify their email address, creates a password, and is then logged in to your web portal where they can use the knowledge base and submit and track requests.

If the **Also send a verification email when a new user is created by an agent or administrator** option has not been selected, the user remains unverified and can't log in. The user receives the ticket received notification with a link to the ticket detail in the web portal but are unable to log in since they can't register (because the user didn't receive the verification email and there's no sign up link in the web portal). You can remove the ticket link in the ticket received email notification using the instructions in the email-only support article (see [Removing placeholders that contain URLs from your notification triggers](#)).

Using enterprise single sign-on (SSO)

If you're using JWT or SAML (available in the Plus and Enterprise versions of Zendesk) for user access to your Zendesk, you also need to add your users first (manually, via bulk import, or using the API). If you use the API, you can set their passwords and also verify their email addresses. If not, you'll probably want to select the **Also send a verification email when a new user is created by an agent or administrator** so that your users receive the verification email and create their passwords themselves. Your users can also initiate the verification process by submitting a support request to your support email address. Since you would have already added each user's email address to your Zendesk account, the user would receive the verification email and be prompted to create a password.

It's important to remember that social media single sign-on is different. These provide your users with additional ways to log in to your Zendesk. To use them, your users need to add these social media accounts to their user profiles themselves. You can't do it for them.

Restricting your forums to logged-in users only

When you close or restrict your Zendesk, you also may want to hide all content in your web portal so that only logged in users can see it. To do this, you just restrict each forum in your web portal to logged in users.

Role restrictions**Who can view topics in this forum?**

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

Setting up forum restrictions is described in more detail in [Setting up and managing forums](#).

When all your forums are restricted to logged in users, visitors to your web portal will only see the login page. The users you added to your Zendesk can log in there and access your forums.

Setting up a restricted Zendesk

You can set up your Zendesk to allow anyone to see your web portal, sign up, and also submit support requests. This is referred to as an *open* Zendesk and is described in more detail in [Setting up an open Zendesk](#). You can also set up your Zendesk so that only the users you add it are able to use it; this is a *closed* Zendesk (see [Setting up a closed Zendesk](#)). The third option you have for controlling end-user access is to set up your Zendesk as *restricted*. This means that your Zendesk is visible to all users but only users with email addresses in domains that you approve are able to successfully register and submit support requests. All other users' requests are either sent to the Suspended Tickets queue or completely rejected, depending on how you set this up.

This configuration allows you to restrict access to your Zendesk but also allows your users to request support without first having been added to your Zendesk, as is the case with a closed Zendesk. This configuration also allows you to use Feedback Tabs and Chat, which you can't do in a closed Zendesk.

Enabling the 'Anyone can submit tickets' option

In a restricted Zendesk you enable the option to allow anyone to submit tickets and then use the whitelist and blacklist to accept or reject those requests.

To enable the 'Anyone can submit tickets' option

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Customers**.
Zendesk Classic: Select **Settings > End-users**.
2. Select the **Anybody can submit tickets** option.
3. Optionally, in the **User welcome email** section, select the **Also send a verification email when a new user is created by an agent or administrator** option.

This option is explained in more detail in [About new user email address verification and passwords](#) below so you can decide if you want to enable it.

The next step is to decide if you want your users to register.

Requiring your users to register

When you enable the **Anyone can submit tickets** option, you can also require your users to register. Requiring registration means that your users must create an account in your Zendesk, verify their email address, and also create a password. The password is required if they want to log in your web portal to submit support requests, use the parts of your knowledge base that have been restricted to logged-in users only, or to track their support requests. Until their email has been verified, their support requests remain in limbo (in other words, not added to your views and agents cannot work on them). You want your users to verify their own email addresses so that you ensure they are who they say they are.

To require that your users register

- Select the **Ask users to register** option, which is displayed when you select the **Anyone can submit tickets** option.

If you don't require registration, your users still have the option of registering themselves. The **Sign Up** page link is still shown in your web portal. This just means that registration is optional and that

the support requests you receive are immediately added to your Zendesk. Tickets are not held up waiting for the user to verify their email address and complete the registration process.

About new user email address verification and passwords

As mentioned above, if you do require your users to register, any support requests they submit are held in limbo until they have verified the email address they used to sign up. Unverified users are also unable to log in since they cannot create a password until they have verified their email address. The **Also send a verification email when a new user is created by an agent or administrator** option merely sends the same verification email that users receive when they sign themselves up for your Zendesk. If you add users yourself and you require your users to register you'll probably want to enable this setting. The user will receive the verification email and then be prompted to verify their email address and choose a password so that their support requests are received in your Zendesk and they can log in to your web portal.

If you don't enable the **Also send a verification email when a new user is created by an agent or administrator** option, your users will not receive the verification email when added by agents or admins. How then will they be able to submit a support request or log in to your web portal? Unverified users who haven't received the verification email can initiate that process themselves by doing the following:

- Visiting your web portal and submitting a support request using the **Submit a request** link
- Sending an email support request to your support email address for the first time

These actions result in the verification email being sent to the user who can then verify their email address and create a password.

Several other options are available to agents and admins. Both can manually verify a user's email address (See [Verifying a user's email address](#) in the Zendesk Agent Guide). Of course doing this doesn't also create a password for the user, but if they don't need to log in to your web portal (if you're providing email only support for example) this allows them to submit tickets. Admins also have the option of setting a user's password. This is a password security setting and should be enabled only after you've considered the security implications. It's always best for only the user to create their own password. For more information, see [Setting the password security level for your Zendesk](#).

Restricting access using the whitelist and blacklist

When you select the **Anyone can submit tickets** option a number of other options are displayed. In addition to the **Require users to register** option, you'll also see the **Whitelist** and **Blacklist**. You use these to specify the email domains that are either allowed to or prevented from registering and submitting support requests.

Any domains or email addresses you add to the blacklist are prevented from submitting tickets. Your blacklist also affects registration. If a user who has been blacklisted attempts to register using the **Sign Up** page, they receive this error message:

“Users with the email address *username@domain.com* are not allowed to sign up for this help desk”

To restrict access using the whitelist and blacklist

- In the **Whitelist** field, add one or more email domains. These are the domains that you are allowing to register and submit tickets.
- In the **Blacklist** field, enter an asterisk (*) to block all other users. You can also enter specific email domains or email addresses.

Aside from the asterisk (*), which suspends email, you can use the following two keywords to build your rules:

- `suspend` - The `suspend` keyword explicitly declares that a specific domain or email address will be sent to the suspended tickets queue. This is identical to blacklisting the domain or email address without a keyword.
- `reject` - The `reject` keyword completely rejects the email, which means that it's not added to the suspended tickets queue.

All three keywords can be used together to define your rules.

Whitelist

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](#).


For more information about using the whitelist and blacklist, see [Using the whitelist and blacklist to control access to your Zendesk](#).

Restricting access to your Zendesk using IP restrictions (Enterprise)

In the Enterprise version of Zendesk, access to your Zendesk can be restricted to specific IP addresses. This means that users from these IP addresses are the only users allowed to log in to your Zendesk. This includes all users.

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. Click the **Manage** icon () in the sidebar, then select **Security**.
Zendesk Classic: Select the **Setting** menu, then select **Security**.
2. Select the **Access Restriction** tab.
3. Select **Access Restriction > Enable**.
4. Enter the IP addresses that are allowed access to your Zendesk.
5. 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.

Allowing customers to bypass the IP restrictions

If you would like your customers to still access your Zendesk outside the IP ranges, and only restrict agent access, select this option.

Allowing your agents to access your Zendesk via mobile apps

To allow your agents to access your Zendesk from native Zendesk apps (iPhone, iPad & Android) regardless of IP address, select this option.

Single sign-on (SSO) options in Zendesk

In addition to the user authentication provided by Zendesk, you can also use single sign-on, which authenticates your users outside of your Zendesk. There are two types: social media single sign-on and enterprise single sign-on.

Social media single sign-on

Social media single sign-on are additional login options that you can provide for your customers convenience. For example, you can make the Facebook, Google, and Twitter logins available on your web portal login page. Your customers can then log in with either their Zendesk account or one of their social media accounts.

The screenshot shows a login page for 'Mondocam'. On the left, there is a form with 'Email address' and 'Password' fields, a 'Log in' button, and a 'Remember me on this computer' checkbox. On the right, under the heading 'Sign in using', there are three buttons for social media logins: Twitter, Facebook, and Google.

Both your end-users and agents can log in to your Zendesk using social media single sign-on.

Social media single sign-on is also available in the mobile web portal. This is the smartphone version of your Zendesk and is described in [Managing your mobile web portal](#). When you enable social media single sign-on, it is automatically added to your mobile web portal.

The steps for adding social media single sign-on to your login page are described in [Enabling social media single sign-on](#).

Enterprise single sign-on

Enterprise single sign-on is different than social media single sign-on. Instead of being optional and in addition to the Zendesk account login, enterprise single sign-on replaces all other login options. After it's been enabled for your Zendesk account, your customers do not see or use your web portal log in page. Instead, they typically log in to a corporate network and then access Zendesk by simply clicking a link (to Support, for example) and are automatically logged in. All user management and authentication happens outside of your Zendesk.

Both your end-users and your agents can log in to your Zendesk using enterprise single sign-on. You configure your enterprise single sign-on once for both end-users and agents. Although, you can still directly access your Zendesk using your Zendesk login page, which you'll need to do to configure some aspects of your Zendesk.

Enabling enterprise single sign-on also affects your mobile web portal. Once enabled, just as with the web version of your Zendesk, all users are redirected to the remote authentication login page and then automatically logged in to your mobile web portal.

For enterprise-level single sign-on, Zendesk supports JWT (JSON Web Token) and SAML (Secure Assertion Markup Language). SAML is only available to Plus and Enterprise accounts. Both options accomplish the same thing: remotely authenticating your users and allowing them access to your Zendesk. However, JWT can be considered more of a custom implementation whereas SAML is supported by many services that you can more easily integrate with your corporate user authentication system (for example, Active Directory and LDAP). These services include Okta, OneLogin, and PingIdentity.

Enabling enterprise single sign-on means that you're bypassing Zendesk and authenticating your users externally. The advantage to using enterprise single sign-on is that you have complete control over your users, behind your firewall. You authenticate your users once, against your own secure user authentication system, and then grant them access to many other resources both inside and outside of your firewall. Imagine logging into your corporate network and then having quick access to the many other cloud-based services you use each day (Salesforce, JIRA, your wiki, Google Apps, and of course your Zendesk) without having to log in to each one separately.

Although user management is done outside of your Zendesk (for example, adding and deleting users), your corporate user authentication system is synced with your Zendesk. So, for example, if you add a user account for a new employee, that employee has immediate access to your Zendesk. Conversely, if you delete a user account because an employee has left the company, that employee no longer has access to your Zendesk.

By default, the only data that Zendesk stores for each user is their name and email address. These are necessary of course because your agents communicate with your end-users through Zendesk and the user's name and email address are needed since that communication is via email. It's also possible to sync more user data to Zendesk, for example the user's organization.

For information about setting up enterprise single sign-on, see the following:

- [Setting up single sign-on with JWT \(JSON Web Token\)](#)
- [Using SAML for single sign-on \(Plus and Enterprise\)](#)
-

Enabling social media single sign-on

You can provide your users with more options for logging in to your Zendesk by allowing them to log in using their existing social media accounts (often referred to as *social login* or *social sign-in*). These include Facebook, Google, and Twitter.

When you enable these in your Zendesk account, they are added as sign-in options on your Zendesk log-in page.



The advantage of enabling these, for your users, is that they don't need to remember yet another user name and password to log in to your Zendesk. These are one type of *single sign-on* available in Zendesk. For more information about the other types of single sign-on available in Zendesk, see [Configuring how end-users access and log in to your Zendesk](#).

Your users are still able to log in to your Zendesk if they already have a Zendesk user account user name and password. They can use both their Zendesk log-in credentials and the social media sign-ins.

How social media sign-in works in Zendesk

The first time a user chooses to log in to your Zendesk using one of their social media accounts they are prompted to authorize that account to be used with Zendesk. After that one time authorization is completed, the user is seamlessly logged in to your Zendesk. On subsequent visits to your Zendesk, the user clicks the social media sign-in button and, if they're already logged in to the social media account, they are immediately logged in to your Zendesk. If they aren't already logged in with the social media account, they'll be prompted to do so. Your users' social media account log-in credentials (user name and password) are never shared with Zendesk. What is shared with Zendesk is the primary email address contained in the social media account. As mentioned above, Zendesk needs this so you can communicate with the user via email.

So far, all of this has been very straightforward. Where it gets a little more complex is if a user already has an account in your Zendesk or if you've restricted or closed your Zendesk (in other words, you don't allow everyone access to your Zendesk).

As an example, imagine that you already have users in your Zendesk and you then add one of these social sign-ins (let's use Facebook in this example). An existing user sees the new Facebook sign-

in button and decides to log in using that rather than using their existing Zendesk user name and password. The Facebook authorization and log-in is as easy as described above. However, unless the primary email address in their Facebook account is also included in their Zendesk user account, a new, duplicate Zendesk user account will be created. This is because Zendesk receives a new email address from Facebook that does not already exist in your Zendesk and assumes that it is a new user. You can merge the duplicate user account into the user's existing account; however, if you enable these social media sign-ins you may want to recommend to your existing users that they add their social media accounts to their user profiles first. They can add them as additional contact information.

The effects of using social media sign-ins in Zendesk accounts that are open, restricted, or closed are described in detail below.

Since each user must log in to their social media accounts to authorize their use with Zendesk, your support staff cannot add these on your users' behalf.

Enabling social media sign-in providers

Support for single sign-on using Twitter, Facebook, Google, and is built-in to Zendesk. No custom configuration of these is necessary. You just enable them and when your users click to log in to your Zendesk using one of these providers they enter their log-in credentials (for their Facebook account, for example), they are authenticated by that provider and then redirected back to your Zendesk and automatically logged in.

To enable social media sign-in providers

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Security > Authentication**.
Zendesk Classic: Select **Settings > Security > Authentication**.
2. Select each of the social media sign-in providers you want to enable.
3. Click **Save tab**.

After you enable your social media sign-in providers, the sign-in links appear on your web portal log-in page (as shown at the beginning of this article). Your users are required to authorize the use of their social sign-in credentials the first time they attempt to log in to Zendesk.

You can use your Twitter account to sign in to other sites and services.
By signing in here, you can use Login to Zendesk without sharing your Twitter password.

Authorize Login to Zendesk to use your account?

This application **will be able to:**

- Read Tweets from your timeline.
- See who you follow.

Username or email

Password

Remember me · [Forgot password?](#)

Sign In **Cancel**

This application **will not be able to:**

- Follow new people.
- Update your profile.
- Post Tweets for you.
- Access your direct messages.
- See your Twitter password.



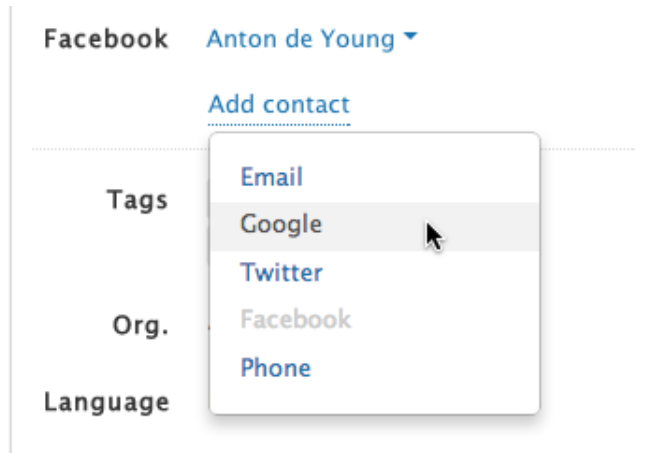
Login to Zendesk
By Zendesk
www.zendesk.com

Zendesk is a leading provider of proven cloud-based help desk software. For growing organizations, Zendesk is the fastest way to enable great customer service.

On subsequent visits to your Zendesk, your users can quickly log in with their user social media sign-in ID and password. If they're already logged in to those services, they aren't prompted for their ID and password; they're immediately logged in to your Zendesk.

Social media sign-ins in an open Zendesk

If your Zendesk is configured as an open Zendesk (see [Setting up an open Zendesk](#)), meaning that anyone can register and submit support requests, and a user logs in to your Zendesk via a social media sign-in for the first time, two things can happen. If the user already exists in your Zendesk and the social media sign-in has already been added to their user profile as an additional contact, then the user will be associated with their existing account.



If however the user is either new (no account in your Zendesk yet) or an existing user's social media account hasn't already been added to their user profile, then a new user account is created. For existing users, you can merge the new user account with their existing account. See [Merging a user's duplicate account](#) in the Zendesk Agent Guide.

Note: When a new user account is created under these conditions, the new user verification email is not sent. This is because the social media account has already verified the user's email address.

Social media sign-ins in a closed or restricted Zendesk

If your Zendesk is closed or restricted (see [Setting up a closed or restricted Zendesk](#)), meaning that access to your Zendesk is granted only to specific users, then social media sign-ins behave a little differently.

In a closed Zendesk, the only way for an approved user to access your Zendesk using a social media sign-in is if the account has already been added to their user profile. If it hasn't already been added, no new user account is created (as it would be in an open Zendesk). Instead, the log in attempt is rejected. If a new user (someone not already added to your Zendesk) attempts to log in via a social media sign-in, the same thing happens--the request is rejected.

If your Zendesk is restricted, meaning that you allow anybody to submit requests but then accept or reject those requests based on the email domains you add to the whitelist or blacklist (see [Using the whitelist and blacklist to control access to your Zendesk](#)), the behavior is the same as a closed Zendesk. If the social media account hasn't already been added to the user's profile, then the attempt to log in will be rejected. The whitelist and blacklist have nothing to do with logging in to your Zendesk; they're only used to accept or reject support requests. As an example, even if you added gmail.com to your whitelist, attempts by users to log in to your Zendesk using the Google social media sign-in would still be rejected if their Google account hasn't already been added to their user profile.

Additional information about Google

The Google sign-in supports both Gmail and Google Apps.

The Federated Login Service is disabled by default for Google Apps Business and Education accounts. The domain admin can enable it from the Control Panel at <http://www.google.com/afcp/yourdomain/SetupIdp>.

If two-factor authentication is enabled by the user or for the Google Apps domain (Google Authenticator), this functionality is supported by this authentication process.

Setting up single sign-on with JWT (JSON Web Token)

By Morten Primdahl

Single sign-on is a mechanism that allows you to authenticate users in your systems and subsequently tell Zendesk that the user has been authenticated. The user is then allowed to access Zendesk without being prompted to enter separate login credentials.

At the core of single sign-on is a security mechanism that allows Zendesk to trust the login requests it gets from your systems. Zendesk only grants access to the users that have been authenticated by you. Zendesk SSO relies on a technology called JSON Web Token (JWT) for securing the exchange of user authentication data.

Note: Before April 29, 2013, single sign-on was provided by Zendesk Remote Authentication. This has been deprecated and JWT is the new solution for single sign-on (read the announcement [here](#)). Plus and Enterprise accounts may also choose to implement single sign-on using SAML (see [Introducing SAML for Zendesk](#)). The Zendesk Remote Authentication documentation is archived and is now available here: [Setting up single sign-on with Zendesk Remote Authentication \(Deprecated\) \[PDF\]](#).

JWT implementation code examples

The actual JWT implementation is straight forward and most modern languages have libraries available. Zendesk provides a series of examples for various stacks in the following JWT SSO GitHub repository:

- https://github.com/zendesk/zendesk_jwt_sso_examples

If you implement JWT in any other stack, we would love to feature an example of that there as well. Add a comment to this article to share what you've implemented.

In case you run IIS/AD and don't want to build your own .NET solution, we are working on providing a full implementation in Classic ASP, which will only require you to adjust a couple of variables. Please subscribe to our [API updates forum](#) to watch for an announcement.

The single sign-on authentication process

Once you enable single sign-on, login requests are routed to a remote login URL (a login page that is external to your Zendesk).

Here are the steps of the single sign-on authentication process:

1. An unauthenticated user (not already logged in) navigates to your Zendesk URL (for example, <https://mycompany.zendesk.com/>).
2. The Zendesk SSO mechanism recognizes that SSO is enabled and that the user is not authenticated.
3. The user is redirected to the remote login URL configured for the SSO settings (for example, <https://mycompany.com/zendesk/sso>).
4. A script on your side authenticates the user using your proprietary login process.
5. Your script builds a JWT request that contains the relevant user data.
6. You redirect the customer to the Zendesk endpoint at <https://mycompany.zendesk.com/access/jwt> with the JWT payload.

7. Zendesk parses the user detail from the JWT payload and then grants the user a session.

As you can see, this process relies on browser redirects and passing signed messages using JWT. The redirects happen entirely in the browser and there is no direct connection between Zendesk and your systems, so you can keep your authentication scripts safely behind your corporate firewall.

Configuring your JWT implementation

If you're upgrading from an earlier version of Zendesk SSO (referred to as Zendesk Remote Authentication) to JWT, it's okay to have multiple SSO implementations enabled at the same time. Zendesk recognizes if a request is meant for JWT or another type of SSO and will handle the request accordingly. This means that you can enable and test JWT before deactivating your previous SSO implementation.

To perform SSO for a user, you need to send several required user attributes to Zendesk as a hash (hash table, dictionary). Most importantly, Zendesk requires an email address to uniquely identify the user. Beyond the required attributes, which are shown in the table below, you may optionally send additional user profile data. This data is synced between your user management system and your Zendesk.

Table 4: Supported attributes

Attribute	Mandatory	Description
iat	Yes	Issued At. The time the token was generated, this is used to help ensure that a given token gets used shortly after it's generated. The value must be the number of seconds since <i>UNIX epoch</i> . Zendesk allows up to two minutes clock skew, so make sure to configure NTP or similar on your servers.
jti	Yes	JSON Web Token ID. A unique id for the token, used by Zendesk to prevent token replay attacks.
email	Yes	Email of the user being signed in, used to uniquely identify the user record in Zendesk.
name	Yes	The name of this user. The user in Zendesk will be created or updated in accordance with this.
external_id	No	If your users are uniquely identified by something other than an email address, and their email addresses are subject to change, send the unique id from your system.
organization	No	Name or id of an organization to add the user to.
tags	No	This is a JSON array of tags to set on the user. These tags will <i>replace</i> any other tags that may exist in the user's profile.
remote_photo_url	No	URL for a photo to set on the user profile.

Most JWT implementations take a hash and a secret, and return a plain string payload to send to the other side. For context, here's an example in Ruby:

```
payload = JWT.encode({
  :email => "bob@example.com", :name => "Bob", :iat =>
  Time.now.to_i, :jti => rand(2<<64).to_s
}, "Our shared secret")
```

```
response.headers["Location"] = "https://example.zendesk.com/access/jwt?jwt=#{payload}"
```

The return_to URL

When Zendesk redirects a user to your login script, it will also pass a `return_to` parameter in the URL. This parameter contains the page that Zendesk will return the user to after the authentication succeeds. For example:

1. A user visits `https://mycompany.zendesk.com/tickets/1232`.
2. Zendesk recognizes that the user is not authenticated.
3. Zendesk redirects the user to:

```
https://mycompany.zendesk.com/zendesk/sso?return_to=https://mycompany.zendesk.com/tickets/123
```

All your script needs to do, is take the `return_to` value from the invoked URL and pass it back to Zendesk when submitting the JWT token. In other words, upon authentication on your side, your script redirects the user to:

```
https://mycompany.zendesk.com/access/jwt?jwt=payload&return_to=https://mycompany.zendesk.com/tickets/123
```

Whether you pass in the `return_to` parameter or not is optional, but we recommend it for the smoothest user experience.

Error handling

If Zendesk encounters an error while processing a JWT login request, it will report a message that explains what the issue is. If you have a return URL configured for your JWT integration, it will redirect to that and pass a "message" and a "kind" parameter. In case of error, the "kind" parameter will always have the value "error". We recommend having a return URL as well as logging messages from Zendesk alongside the type, most of the errors that can happen are ones that you will want to fix (for example, clock drifts, rate limits being hit, invalid tokens, and so on).

Enabling JWT single sign-on in your Zendesk

To start using JWT single sign-on, you need to enable and configure it in your Zendesk account.

To enable JWT single sign-on

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Security**.
2. Select the **Single Sign-On** tab.

Zendesk Classic: Select **Settings > Security** then select the **Single Sign-On** tab.
3. Next to the **JSON Web Token** option, click **Edit**.
4. Select **Enabled**.
5. Enter the **Remote Login URL**. This is where your user will be redirected when they attempt to access your Zendesk URL.
6. Enter the **Remote Logout URL**. This is the URL that Zendesk will return your users to after they log out.
7. You can optionally restrict access to users within a range of IP addresses.
8. If you use external IDs for your users, you can update these in your Zendesk by selecting **Allow update of external ids?**

9. Finally, you need to generate a shared secret by clicking **Generate a new token**. Copy the shared secret because you'll need to use it in your JWT implementation.

Important: You must keep the shared secret safe because if that gets compromised all the data in your Zendesk account is at risk.

10. When you're done configuring JWT, click **Save**.

Additional information about JWT

JWT is a recent open standard that is being driven by the international standards body *IETF* and has top-level backers from the technology sector (for example, Microsoft, Facebook, and Google).

The fundamental building blocks of JWT are very well understood components and the result of this is a fairly simple spec, which is available here <http://tools.ietf.org/html/draft-jones-json-web-token-10>. There are a lot of open source implementations of the JWT spec that cover most modern technologies. This means that you can get JWT single sign-on set up without much difficulty.

One thing to be aware of is that the JWT payload is merely encoded and signed, not encrypted, so don't put any sensitive data in the hash table. JWT works by serializing the JSON that is being transmitted to a string. It then base 64 encodes that string and then makes an HMAC of the base 64 string which depends on the shared secret. This produces a signature that the recipient side can use to validate the user.

Using SAML for single sign-on (Plus and Enterprise)

Zendesk supports Secure Assertion Markup Language (SAML), which allows you to provide single sign-on (SSO) for your Zendesk using enterprise identity providers such as Active Directory and LDAP. Single sign-on using SAML is available to Plus and Enterprise accounts.

Note: If you're not on the Plus or Enterprise plans, you can set up enterprise single sign-on using JWT (JSON Web Token) remote authentication. See [Setting up single sign-on with JWT \(JSON Web Token\)](#).

Implementing single sign-on via SAML means that the log in process and user authentication are handled entirely outside of your Zendesk. Your users will not directly visit your Zendesk web portal to log in. Instead users log in to the corporate system (authenticated by Active Directory or LDAP for example) and click a link to access Zendesk and are automatically logged in. No need to enter separate login credentials for Zendesk.

You can build a SAML server in-house (using OpenAM, for example) or choose a SAML service such as Okta, OneLogin, and PingIdentity. You'll need to set these up yourself outside of Zendesk. What you enable in Zendesk is the option to use SAML for single sign-on (see [Enabling SAML single sign-on in your Zendesk](#) below).

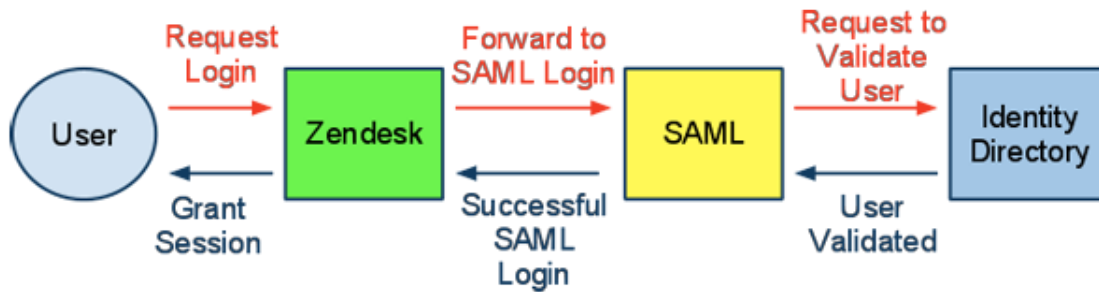
After you've enabled SAML (by building a SAML server yourself or by using one of the SAML services), all user management and authentication is handled outside of your Zendesk. However, changes made outside of your Zendesk are immediately synced back to your Zendesk. For example, if you add or delete a user in your internal Active Directory or LDAP authentication system, that change is synced back through your SAML provider, and the user is added to or deleted from your Zendesk.

The only user data that is stored in Zendesk is the user name and email address. However, you can also choose to sync the following user data: organization, phone, tags, given name, surname. You do this with by adding these attributes to your SAML assertion code. See [User attributes that can be set in SAML](#). Zendesk does not store user passwords.

How SAML for Zendesk works

SAML for Zendesk works the way SAML does with all other service providers. The typical use case is that your users belong to a corporation and all user authentication is managed by your corporate authentication system (for example, Active Directory or LDAP), which is referred to generically as an identity provider (IdP). The service provider (SP), in this case of course Zendesk, establishes a trust relationship with IdP and allows that external IdP to authenticate users and then seamlessly log them in to Zendesk. In other words, a user logs in at work and then has automatic access to the many other corporate applications such as email, your CRM, and so on without having to login separately to those services. Aside from the convenience this provides to users, all user authentication is handled internally by a system that you have complete control over.

After you've enabled SAML as the type of single sign-on for your Zendesk, users who visit your Zendesk and attempt to log in are redirected to your SAML server for authentication. Your users' identities can be stored either on the SAML server or can be validated by an identity directory such as Microsoft Active Directory or LDAP. Once authenticated, users are redirected back to your Zendesk and automatically logged in.



Returning visitors are automatically authenticated if their SAML assertions are cached. Assertions are packets of security information that are used to make access-control decisions. When new users access your Zendesk a user profile created in Zendesk; however, since users are authenticated via SAML their Zendesk profiles do not contain a password.

Note: To access your Zendesk account from the Zendesk mobile app or many of the Zendesk integrations, or to do any development work with the Zendesk API or App framework, you will need a Zendesk password. Single sign-on will not work in these cases.

Configuring your SAML implementation

You have a number of options when considering a SAML service, including building a SAML server in-house (for example, OpenAM) or choosing a SAML service such as Okta, OneLogin, and PingIdentity.

To set up SAML in your Zendesk, you'll need the following:

- A SAML server with provisioned users or connected to an identity repository such as Microsoft Active Directory or LDAP
- The Remote Login URL for your SAML server (sometimes called SAML Single Sign-on URL)
- The SHA1 fingerprint of the SAML certificate from your SAML server

After you have your SAML server properly configured, you use the remote login URL and the SHA1 fingerprint to configure SAML within your Zendesk.

Other SAML servers may require additional information

Other SAML servers may ask for the following information when configuring an integration with Zendesk:

- The Access Consumer Service (ACS) URL is <https://accountname.zendesk.com/access/saml> (case sensitive)
- Redirects to SAML Single Sign-on URL are HTTP POST
- Hashing algorithm (ADFS): Zendesk currently only supports SHA-1 algorithm when using Active Directory Federation Services (ADFS)

Integration with Active Directory Federation Services (ADFS)

Currently, we only support Forms Based Authentication for ADFS; we do not support Integrated Windows Authentication.

User attributes that can be set in SAML

The following five user attributes can be set via SAML:

- organization
- phone
- tags
- given name
- surname

You set these using an attribute statement in your SAML assertion, as in this example:

```
<saml:AttributeStatement>
  <saml:Attribute Name="organization">
    <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:type="xs:string">Organization name</saml:AttributeValue>
  </saml:Attribute>
  <saml:Attribute Name="tags">
    <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:type="xs:string">tag1 tag2</saml:AttributeValue>
  </saml:Attribute>
  <saml:Attribute Name="phone">
    <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:type="xs:string">555-555-5555</saml:AttributeValue>
  </saml:Attribute>
  <saml:Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/
claims/givenname">
    <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:type="xs:string">Zack</saml:AttributeValue>
  </saml:Attribute>
  <saml:Attribute Name="http://schemas.xmlsoap.org/ws/2005/05/identity/
claims/surname">
    <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
      xsi:type="xs:string">Doe</saml:AttributeValue>
  </saml:Attribute>
</saml:AttributeStatement>
```

Enabling SAML single sign-on in your Zendesk

After you've set up a SAML provider, you use information from the With your SAML server configured and the information you need for setting up SAML in Zendesk at hand, log in to your Zendesk as an administrator and follow this procedure.

To enable SAML in your Zendesk

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Security**.
Zendesk Classic: Select **Settings > Security**.
2. Select the Single Sign-on tab.
3. Next to the **SAML** option, click **Edit**
4. Select **Enabled**.
5. In the **SAML SSO URL** input, enter the SAML login URL of your SAML server.

The **Remote logout URL** and **IP ranges** are both optional, but the **Certificate Fingerprint** is required for us to communicate with your SAML server.

SAML

Enabled

SAML SSO URL
This is the URL that Zendesk will invoke to redirect users to your Identity Provider. Note that our Assertion Consumer Service (ACS) URL is https://antondyoung.zendesk.com/access/saml/

Remote logout URL
This is the URL that Zendesk will return your users to after they log out, e.g. https://www.yourcompany.com/services/zendesk_logout.asp

IP ranges (optional)
Requests from these IP ranges will always be routed via remote authentication. Requests from IP addresses outside these ranges will be routed to the normal login form. To route all requests through remote authentication, leave this blank. 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. Your current IP address is: 209.119.38.228

Certificate fingerprint
The SHA1 fingerprint of the SAML certificate. Obtain this from your SAML identity provider.

Cancel or Save

6. Click **Save**.

Note: When you enable single sign-on via SAML (and JWT), be aware that passwords do not expire (even if your Zendesk password policy is set to High) because passwords are not stored in Zendesk. Additionally, if agents manually add a Zendesk password to their account, these passwords will not expire.

Troubleshooting your SAML configuration

If you have difficulty setting up SAML, you may find the following information helpful.

Here is the Zendesk SAML 2.0 metadata:

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<EntityDescriptor entityID="zendesk.com"
  xmlns="urn:oasis:names:tc:SAML:2.0:metadata">
  <SPSSODescriptor AuthnRequestsSigned="false"
    WantAssertionsSigned="true"
    protocolSupportEnumeration="urn:oasis:names:tc:SAML:2.0:protocol">
    <NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-
format:emailAddress</NameIDFormat>
```

```

    <AssertionConsumerService index="1"
      Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
      Location="https://accountname.zendesk.com/access/saml"/>
    </SPSSODescriptor>
  </EntityDescriptor>

```

Zendesk expects a SAML assertion that looks like this:

```

<samlp:Response xmlns:samlp="urn:oasis:names:tc:SAML:2.0:protocol"
  ID="s2202bbbb
afa9d270d1c15990b738f4ab36139d463"
  InResponseTo="_e4a78780-35da-012e-8ea7-005056
9200d8" Version="2.0" IssueInstant="2011-03-21T11:22:02Z"
  Destination="https://accountname.zendesk.com/access/saml">
  <saml:Issuer
    xmlns:saml="urn:oasis:names:tc:SAML:2.0:assertion">myidp.entity.id
  </saml:Issuer>
  <samlp:Status xmlns:samlp="urn:oasis:names:tc:SAML:2.0:protocol">
    <samlp:StatusCode
      xmlns:samlp="urn:oasis:names:tc:SAML:2.0:protocol"
      Value="urn:oasis:names:tc:SAML:2.0:status:Success">
    </samlp:StatusCode>
  </samlp:Status>
  <saml:Assertion xmlns:saml="urn:oasis:names:tc:SAML:2.0:assertion"
    ID="s2af6627280d72f061beb9f8b1635bd54cc2892317"
    IssueInstant="2011-03-21T11:22:02Z" Version="2.0">
    <saml:Issuer>myidp.entity.id</saml:Issuer>
    <ds:Signature xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
      <ds:SignedInfo>
        <ds:CanonicalizationMethod Algorithm="http://www.w3.org/2001/10/xml-exc-c14n#" />
        <ds:SignatureMethod Algorithm="http://www.w3.org/2000/09/xmldsig#rsa-sha1" />
        <ds:Reference
          URI="#s2af6627280d72f061beb9f8b1635bd54cc2892317">
          <ds:Transforms>
            <ds:Transform Algorithm="http://www.w3.org/2000/09/xmldsig#enveloped-signature" />
            <ds:Transform Algorithm="http://www.w3.org/2001/10/xml-exc-c14n#" />
          </ds:Transforms>
          <ds:DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1" />
          <ds:DigestValue>ifvqELggmae4/L5uxZF8wp5B9TI=</
ds:DigestValue>
        </ds:Reference>
      </ds:SignedInfo>
      <ds:SignatureValue>
1FHS3gUk6H/aY1hTPeGuV+d4YRXOufDV41YAXmYyd8pIGEUB8TE5snXhi8GYt
+GaDuKonlOtuTLF
... my signature value ...
Zj2jLeS6q7nIZMwuQRs=
      </ds:SignatureValue>
      <ds:KeyInfo>
        <ds:X509Data>
          <ds:X509Certificate>
MIIDhzCAAvCgAwIBAgIJAKm2IOKHLajCMA0GCSqGSIb3DQEBBQUAMIGKMQswCQYDVQQGEwJOTzEN
.... The rest of the signing certificate ....

```

```

KC0SMAlW99kwISj02MZfdtSGNd4RfR2yymbAGDqfEBhNE/Tg8mP6/8mjDAbUtBXaKZ42eA==
    </ds:X509Certificate>
  </ds:X509Data>
</ds:KeyInfo>
</ds:Signature>
<saml:Subject>
  <saml:NameID Format="urn:oasis:names:tc:SAML:1.1:nameid-
format:emailAddress"
  NameQualifier="idp.accountname.com">firstnam.lastname@company.com</
saml:NameID>
  <saml:SubjectConfirmation
  Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
    <saml:SubjectConfirmationData
    InResponseTo="_e4a78780-35da-012e-8ea7-0050569200d8"
    NotOnOrAfter="2011-03-21T11:32:02Z" Recipient="https://
accountname.zendesk.com/access/saml"/></saml:SubjectConfirmation>
  </saml:Subject>
  <saml:Conditions NotBefore="2011-03-21T11:12:02Z"
  NotOnOrAfter="2011-03-21T11:32:02Z">
    <saml:AudienceRestriction>
      <saml:Audience>zendesk.com</saml:Audience>
    </saml:AudienceRestriction>
  </saml:Conditions>
  <saml:AuthnStatement AuthnInstant="2011-03-21T11:22:02Z"
  SessionIndex="s25c49ea33a9598e2c930899f528b5f00fde2fe901">
    <saml:AuthnContext>

    <saml:AuthnContextClassRef>urn:oasis:names:tc:SAML:2.0:ac:classes:PasswordProtectedTr
saml:AuthnContextClassRef>
      </saml:AuthnContext>
    </saml:AuthnStatement>
  </saml:Assertion>
</samlp:Response>

```

Setting up SAML single sign-on with Okta (Plus and Enterprise)

Okta supports single sign-on for Zendesk using SAML (Secure Assertion Markup Language). For many of the settings used to configure single sign-on in Okta, you'll find much more detailed information in the Okta user interface. Single sign-on using SAML is available to Plus and Enterprise accounts. For more about SAML support in Zendesk, see [Using SAML for single sign-on \(Plus and Enterprise\)](#).

Note: If you're not on the Plus or Enterprise plans, you can set up enterprise single sign-on using JWT (JSON Web Token) remote authentication. See [Setting up single sign-on with JWT \(JSON Web Token\)](#).

Configuring SAML must be done in both in your Okta account and in your Zendesk. You start in Okta first and get the SAML information you'll need to complete the configuration in your Zendesk.

Configuring SAML in Okta

Log in to Okta as an administrator and then follow the steps below.

To configure SAML for Zendesk in Okta

1. Select **Add Applications** from the dashboard.
2. Click **Add Application**, then search for and choose "Zendesk". The **Add Zendesk** wizard will be displayed.
3. In the first screen (**General Settings**), add a name for the application and your Zendesk subdomain (for example: if your Zendesk URL is mycompany.zendesk.com, enter mycompany). Click **Next**.
4. On the second screen (**Sign-On Options**), select **SAML 2.0**. This is where you'll find the **SAML SSO URL**, the **Remote logout URL**, and the **Certificate fingerprint**. You need this information to complete the SAML setup in your Zendesk.
5. Click the **SAML 2.0 setup instructions for Zendesk** link and this page will be displayed in a new web browser window:

Configure SAML in Zendesk

1. Go to the **Settings / Security** page, then the **Authentication** tab.
2. Check the **Enabled** box for the **Single Sign-On** option
3. In the **Mode** drop-down box, select **SAML**
4. Copy the following into **SAML SSO URL**:

```
https://antondeyoung.okta.com/app/zendesk/k1qyx5njQSAHUGORNDVR/sso/saml
```

5. Copy the following into **Remote logout URL**:

```
https://antondeyoung.okta.com
```

6. Copy the following into **Certificate fingerprint**:

```
3079d21256228a763094db951e669e297e30e30e
```

7. Click the **Save Tab** button
8. **Note:** If you lock yourself out of Zendesk you can login without SSO from: <http://antondeyoung.zendesk.com/access/normal>

These are the instructions for configuring SAML in your Zendesk. Copy the **SAML SSO URL**, the **Remote logout URL**, and the **Certificate fingerprint** and then close this window and return to your Okta dashboard.

6. The next step is **User Management**, which is optional. If you enable user management, you'll be able to import users from your Zendesk into your Okta account, provision new Zendesk accounts from Okta, and push Okta user profile updates and passwords to Zendesk. You'll find information about these Okta features in your Okta account and documentation.
7. The final step (**People**) is also optional and allows you to select who in your Okta account has access to your Zendesk. This as well is beyond the scope of this article; you'll find information about these Okta features in your Okta account and documentation.
8. When you've completed each step, click **Next** to complete and close the Zendesk configuration in Okta.

Login to your Zendesk as an administrator and follow the instructions in the next section.

Configuring SAML in Zendesk

With your Zendesk for Okta set up completed and the information you need for setting up SAML in Zendesk at hand, log in to your Zendesk as an administrator and follow the steps below.

To enable SAML in your Zendesk

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Security**.
2. Select the **Single Sign-on** tab.
Zendesk Classic: Select **Settings > Security**, then select the **Single Sign-on** tab.
3. Click **Enabled**.
4. Enter the **SAML SSO URL**, **Remote logout URL**, and the **Certificate Fingerprint** you saved from your Zendesk for Okta configuration settings.

SAML

Enabled

SAML SSO URL

This is the URL that Zendesk will invoke to redirect users to your Identity Provider. Note that our Assertion Consumer Service (ACS) URL is `https://antondeyoung.zendesk.com/access/saml/`

Remote logout URL

This is the URL that Zendesk will return your users to after they log out, e.g. `https://www.yourcompany.com/services/zendesk_logout.asp`

IP ranges (optional)

Requests from these IP ranges will always be routed via remote authentication. Requests from IP addresses outside these ranges will be routed to the normal login form. To route all requests through remote authentication, leave this blank. 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. Your current IP address is: `209.119.38.228`

Certificate fingerprint

The SHA1 fingerprint of the SAML certificate. Obtain this from your SAML identity provider.

Cancel or Save

5. You can optionally add IP ranges if you'd like.
6. Click **Save**.

Note: When you enable single sign-on via SAML (and JWT), be aware that passwords do not expire (even if your Zendesk password policy is set to High) because passwords are not stored in Zendesk. Additionally, if agents manually add a Zendesk password to their account, these passwords will not expire.

Chapter

4

Tickets

- *About ticket fields*
- *Adding and using custom ticket fields*
- *Adding the On-hold ticket status to your Zendesk*
- *Enabling Markdown*
- *Adding an agent signature to ticket email notifications*
- *Setting permissions to add CC's*
- *Updating ticket properties from your inbox*
- *Sharing tickets with other Zendesk accounts*
- *Using business rules to share tickets (Enterprise)*
- *Archiving email notifications (Enterprise)*

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.

The screenshot shows the Zendesk ticket interface. On the left, there are several configuration sections: 'Assignee*' with a dropdown set to 'Support/Max McCal'; 'CCs' with a field containing 'Matthew matthew@mondocom.com'; 'Share' with a dropdown set to 'Kongen Image Sensors @ Zendesk'; 'Type' set to 'Problem' and 'Priority' set to 'Normal'; 'Tags' with 'california', 'consumers', and 'xd-800'; and 'Camera models*' with a dropdown set to 'Mondocom XD-800'. On the right, the ticket details are shown: 'Auto ISO problem' with a timestamp 'Jan 03, 2012 10:37 am' and user 'Siena Nenners'. Below this is a 'Public reply' button and a text input field. A comment from 'Siena Nenners' is visible, stating: 'I set my ZD-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?'.

You can manage your ticket fields in the **Ticket Fields** page.

To open the Ticket Fields page

- Click the **Manage** icon (⚙️) in the sidebar, then select **Ticket Fields**.

Zendesk Classic: Select the **Manage** menu, then select **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 in the Tickets page, 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. See Copying someone else (CC) on a ticket in the Zendesk Agent Guide.
Share	As described in Sharing tickets with other Zendesk accounts , you can share tickets with other Zendesk accounts. You must first establish sharing agreements and then you can select another Zendesk account to share the ticket with. This field is only displayed if you've enabled ticket sharing in the Ticket Sharing tab of the Tickets page.
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	<p>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).</p> <p>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.</p> <p>Open means that the request has been assigned to an agent who is working to resolve it.</p> <p>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.</p> <p>On-hold means that the support request is awaiting a resolution from a third party—someone who is not a member of your support staff and does not have an agent account in your Zendesk. This status is optional and must be added to your Zendesk (see Adding the On-hold ticket status to your Zendesk).</p> <p>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.</p> <p>Closed means that the ticket is complete and can't be reopened. Requesters however can create follow-up requests for closed requests.</p>
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.

Problem is used to indicate that the requester is having an issue with your product or service that is likely to be experienced by other requesters.

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.

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.

Community tip! [Arnaud de Theux](#) shows you how to change the default ticket priority names in [our community forums](#).

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 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](#).

Community tip! [Tal](#) shows how to hide specific ticket fields from a group of agents. Check it out in our [community forums](#)!

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 tickets in Zendesk, on the support request form in the Web portal, and in the Feedback Tab.

Topics covered in this article:

- [How custom fields works](#)
- [Adding a custom field](#)
- [Organizing drop-down list options](#)
- [Custom fields and business rules](#)
- [Custom fields and views](#)
- [Understanding the persistence of custom field data](#)

How custom fields work

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.

How can we help you? Search our Knowledge Base

Question*
Briefly describe your question

Details*
Fill in the details here. Please try to be as specific as possible.

Name* **Your email address***

Please tell us your reason for contacting us
(none)

Model Number
 (none)
 MondoShot 789HD
 ZD-89 Digital Pro
 Buddha XS 18-M

Submit

Custom fields can be required or optional. You can make them required just for agents or for both end-users and agents.

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](#)).

Adding a custom field

Only administrators can add custom fields.

To add a custom field

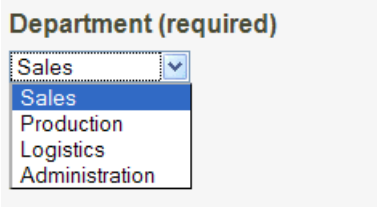
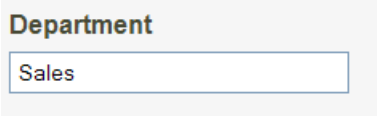
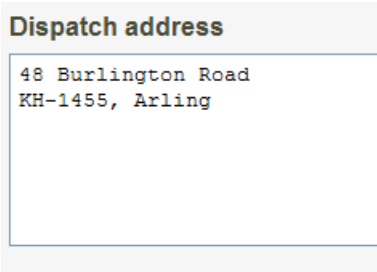
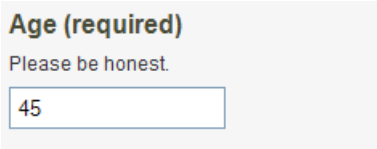
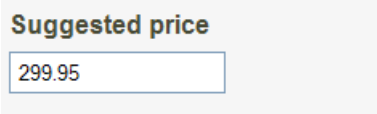
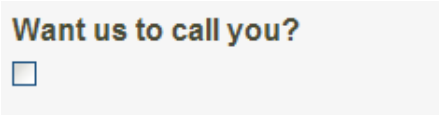
1. Click the **Manage** icon (⚙️) in the sidebar, then select **Ticket Fields**.

Zendesk Classic: Select the **Manage** menu, then select **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 sign in to your Zendesk 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.

Community tip! Tal shows how to hide specific ticket fields from a group of agents. Check it out in our [community forums](#)!
6. Click **Add Field**.

Table 5: Custom field types

Types	Description
Drop-down list	<p>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.</p> <p>You can also organize drop-down list options into categories (see Organizing drop-down list options).</p>








Types	Description
	
Text	<p>This is a simple single line text input.</p> 
Multi-line text	<p>This is a multiple line text input.</p> 
Numeric	<p>This is for simple numeric input (no decimals).</p> 
Decimal	<p>This is for numbers that contain decimals.</p> 
Checkbox	<p>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.</p> 
Regular expression	<p>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</p>

Types	Description
	<p>for a U.S. social security number: <code>\b[0-9]{3}-[0-9]{2}-[0-9]{4}\b</code>. 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.</p>
	<p>Product ID</p> <p>AOPL-23ER-323T-54TY</p>

Organizing drop-down list options

You can create drop-down lists that contain up to six 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:

Title:	Digital SLR Cameras::Professional::Mondocam XD-8i	Tag:	xd-80	
Title:	Digital SLR Cameras::Professional::Mondocam XD-8i	Tag:	xd-89	
Title:	Digital SLR Cameras::Consumer::Mondocam HD-1000	Tag:	hd-1000	
Title:	Digital SLR Cameras::Consumer::Mondocam HD-2000	Tag:	hd-2000	
Title:	Digital Compact Cameras::Buddha XS 18-M	Tag:	xs-18m	
Title:	Digital Compact Cameras::Mondocam ZD-89	Tag:	zd-89	
Add tag option				

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

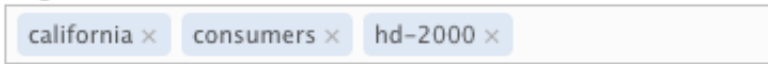


As with drop-down list options that do not contain categories, your tags should be for the selection value.

Custom fields and business rules

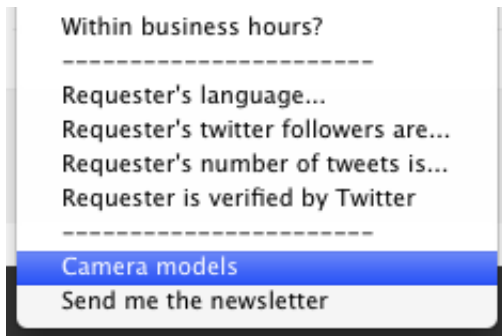
The drop-down list and checkbox custom fields generate tags that can be used in your business rules. Using the example above, when a MondoCam customer selects a camera model, a tag is added to ticket along with any other tags that are added by business rules or user and organization tagging.

Tags



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.



Community tip! John shows how to auto-populate custom ticket fields based on tags for richer reporting with GoodData! [Check it out](#) in our community forums!

Custom fields and views

After creating a custom field, you can add it to your views. For example, suppose you create a custom field to let users select one of your product lines. After adding the custom field as a column in a view, you can sort the tickets by product line by clicking the column's heading. For more information on views, see [Using views to manage ticket workflow](#) in the Agent Guide. To add fields to your views, see [Setting formatting options](#) in the article.

The sort order of custom-field columns in views is by the underlying tags used for the custom field. For example, if you sort the tickets by ascending order, the order is by the alphabetical order of the field's tags, not its titles.

For example, suppose you create a custom dropdown menu with the following product lines:

- Photography (tag: photography)
- Video (tag: audiovisual)
- Medical (tag: endoscopy)

If you add the field to a view and sort by ascending order, the tickets would be grouped and ordered as follows:

1. Video tickets (tag: audiovisual)
2. Medical tickets (tag: endoscopy)
3. Photography tickets (tag: photography)

If you want to list your photography tickets at the top of the view, click the column heading again to sort by descending order.

Understanding the persistence of custom field data

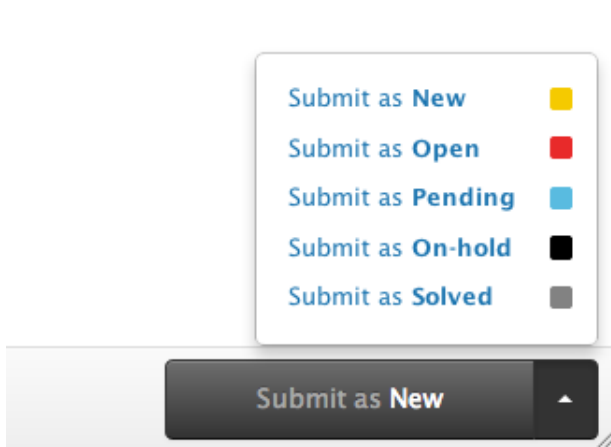
If you delete a custom field from Zendesk, the data from the custom field is not preserved in existing tickets, including closed tickets. The data is preserved only if the custom field also adds a tag to a ticket. The two custom fields that add tags are the drop-down list and the checkbox. If you delete one of these custom fields, then the data in tickets persist as tags.

For example, suppose you have a drop-down list in your ticket form to associate tickets with different product names. After a while, a decision is made to stop providing support for one of the products. If you remove the product from the drop-down list, the product name persists in existing tickets as a tag. If however you use a text field to record a product ID and you delete the text field, the product ID is not preserved in your tickets.

Adding the On-hold ticket status to your Zendesk

The On-hold status is optional and not available in your Zendesk unless you enable it. What is it used for? With it you can track tickets that require input or resolution from a third party. This gives you another level of detail so that you can more accurately track who currently has responsibility for a ticket. As an example, imagine that your company produces a product that includes components from partners and other suppliers. If you have tickets that require their input, and for which the assigned agent can do nothing but wait for that input, setting the ticket to On-hold provides you with a tool for distinguishing between tickets that are the responsibility of your support staff and those that are waiting for a third party.

Note: The On-hold status is available in the Regular, Plus, and Enterprise plans.



If you track your agents' performance, adding and using the On-hold status allows you to filter out all On-hold tickets from the agent's individual performance tracking. The On-hold status is added to the Status condition between Pending and Solved. So if you want to track the tickets that are truly an agent's responsibility using a view, you can use the condition statement **Status less than On-hold**, which will return tickets that are set to Pending, Open, or New.

You can also use the On-hold status to create a workflow for tickets that require input or a resolution from a third party. For example, you can create views by tickets that are on-hold, or you might create an automation to remind the agent to contact the third party for an update, or use a trigger to directly send an email reminder to the third party.

Community Tip! Andrew shows how to [set reminders for On-hold tickets](#) in our community forums!

In addition, in the Plus and Enterprise versions of Zendesk, the On-hold status is added as an extended reporting metric called **On-hold time in hours**. This new metric and its effect on other extended reporting metrics is described in [Using the On-hold status in your reports](#) below.

It's important to also note that the On-hold status is only visible to agents in your Zendesk; it is not visible to end-users. For end-users, tickets that are set to On-hold are always displayed as Open.

Enabling the On-hold status

An administrator can add the On-hold status to your Zendesk.

To enable the On-hold status

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Ticket Fields**.
Zendesk Classic: Select the **Manage** menu, then select **Ticket Fields**.
2. Locate the **Status** field and then click **Edit**.
3. Select **Add status On-hold**.

Field options

Add status On-hold

A ticket with status set to On-hold means that a response is needed from a third-party, not the requester or the assignee. You can generate reports based on On-hold times. On-hold is included in the Requester Wait Time metrics, but not the Agent Wait Time metrics.
Enable this option to add On-hold as a ticket status.

Update field

4. Click **Update field**.

Using the On-hold status in views and SLAs

You create new views, or edit existing views, to track tickets that are On-hold. You can select On-hold as the value of the **Status** condition and also use the **Hours since on hold** condition.

View title

On-hold tickets

Meet all of the following conditions:

Status	Is	On-hold	-
Hours since on-hold	(calendar) Greater than	24	-

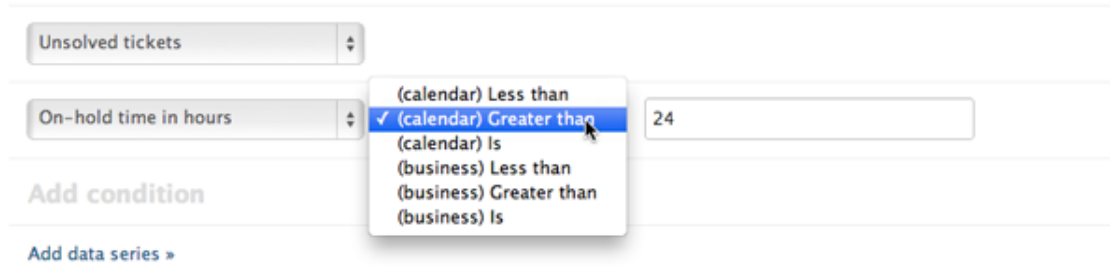
The On-hold status is added to the Status condition between Pending and Solved. This means that the condition statement **Status less than On-hold** will return tickets that are Pending, Open, or New and **Status greater than On-hold** will return tickets that are set to Solved or Closed.

The **Hours since on hold** condition allows you to specify the hours that have passed since the ticket's status was set to On-hold.

In SLAs (Service Level Agreements), the On-hold status is treated like any other status that is less than solved. SLAs cannot be paused based on the On-hold status.

Using the On-hold status in your reports (Plus and Enterprise only)

In the Plus and Enterprise versions of Zendesk, the On-hold status is available as an extended reporting metric. This means that to track your On-hold tickets using a report, you add the **On-hold time in hours** condition.



The **On-hold time in hours** metric is the cumulative time that a ticket is in the On-hold status (available in both business and calendar hours) and it allows you to track how long tickets are waiting for a response or resolution from a third party.

When you add the On-hold status, it is also calculated into the **Requester wait time in hours** metric, which is now defined as the cumulative time that a ticket is in a New, Open, or On-hold state. This is the total amount of time that the requester waits for support. The requester isn't aware if the ticket is with a support agent or a third party; it's not relevant to the requester.

Note: The **Agent wait time in hours** metric is not affected by the On-hold status. This metric is still defined as the cumulative time a ticket has been in a Pending state (awaiting a response from the requester).

How the On-hold status works with ticket sharing

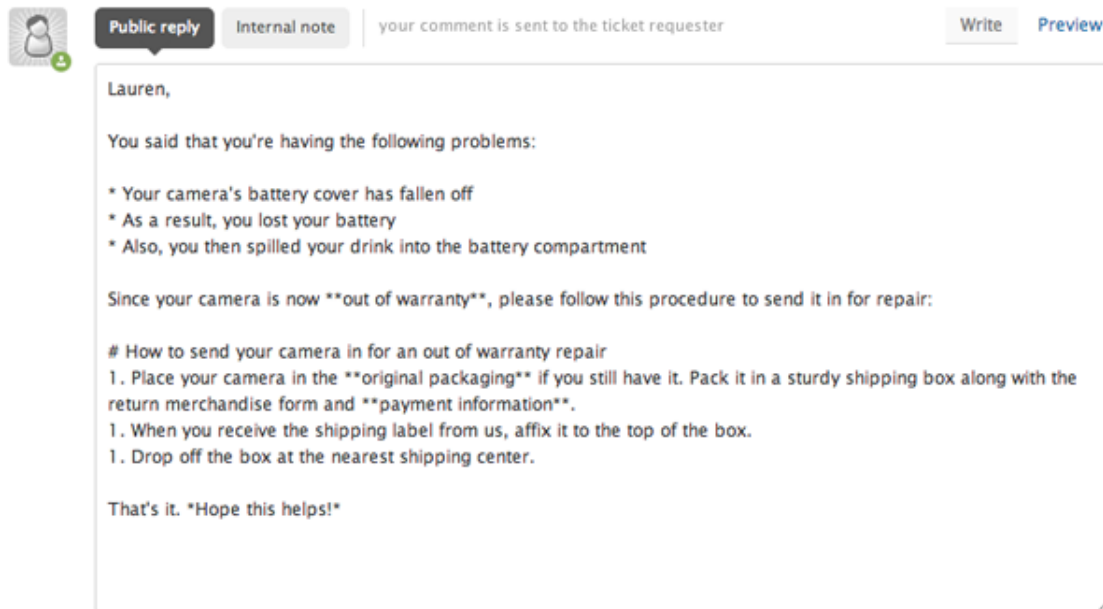
The On-hold status only affects ticket sharing agreements that use **Make public & private comments; sync status**. Because On-hold is an optional status in Zendesk, these ticket sharing agreements treat On-hold as Open.

For example, if a shared ticket is set to On-hold by the sending account, the ticket is displayed as Open in the receiving account. All other statuses will sync normally.

Enabling Markdown

The comments that agents add to tickets and the email notifications that are sent to requesters can be enhanced with rich text formatting provided by Markdown, which is a simple but powerful markup language. Your agents format their comments using simple text markup to, for example, add headings, bullet lists, and other useful text formatting. Your agents enter Markdown as plain text and can then preview what comments will look like to the requester as they will see it the email notifications they receive.

Here's an example comment written using Markdown:



The screenshot shows a Zendesk ticket comment editor. At the top, there is a profile icon on the left, a dropdown menu with "Public reply" selected and "Internal note" as an option, and a text label "your comment is sent to the ticket requester". On the right side, there are "Write" and "Preview" buttons. The main text area contains the following content:

Lauren,

You said that you're having the following problems:

- * Your camera's battery cover has fallen off
- * As a result, you lost your battery
- * Also, you then spilled your drink into the battery compartment

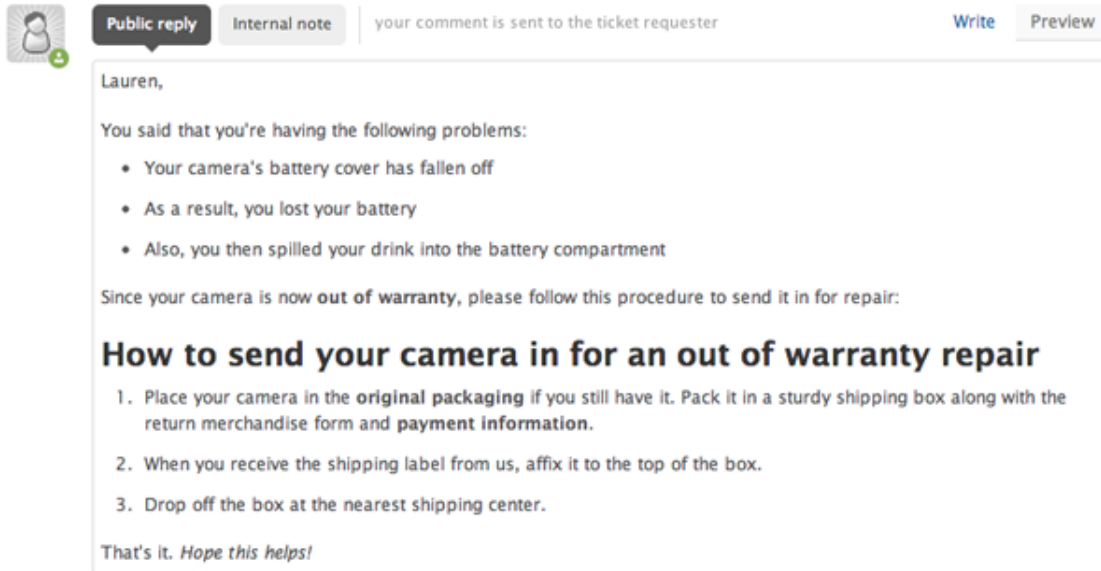
Since your camera is now **out of warranty**, please follow this procedure to send it in for repair:

How to send your camera in for an out of warranty repair

1. Place your camera in the **original packaging** if you still have it. Pack it in a sturdy shipping box along with the return merchandise form and **payment information**.
1. When you receive the shipping label from us, affix it to the top of the box.
1. Drop off the box at the nearest shipping center.

That's it. *Hope this helps!*

Here's what that looks like in preview mode:



The screenshot shows a Zendesk ticket reply interface. At the top left is a user profile icon. To its right are two tabs: "Public reply" (selected) and "Internal note". Below the tabs is the text "your comment is sent to the ticket requester". On the far right are "Write" and "Preview" buttons. The main content area contains a reply to a customer named Lauren. The reply text is as follows:

Lauren,

You said that you're having the following problems:

- Your camera's battery cover has fallen off
- As a result, you lost your battery
- Also, you then spilled your drink into the battery compartment

Since your camera is now **out of warranty**, please follow this procedure to send it in for repair:

How to send your camera in for an out of warranty repair

1. Place your camera in the **original packaging** if you still have it. Pack it in a sturdy shipping box along with the return merchandise form and **payment information**.
2. When you receive the shipping label from us, affix it to the top of the box.
3. Drop off the box at the nearest shipping center.

That's it. *Hope this helps!*

And here's what the requester sees in the email notification:



Max McCal

Dec 13 02:47 pm (AKST)

Lauren,

You said that you're having the following problems:

- Your camera's battery cover has fallen off
- As a result, you lost your battery
- Also, you then spilled your drink into the battery compartment

Since camera is now **out of warranty**, please follow this procedure to send it in for repair:

How to send your camera in for an out of warranty repair

1. Place your camera in the **original packaging** if you still have it. Pack that inside a sturdy shipping box along with the return merchandise form and **payment information**.
2. When you receive the shipping label from us, affix it to the top of the box.
3. Drop off the box at the nearest shipping center.

That's it. *Hope this helps!*

Enabling rich text formatting via Markdown enhances the look and readability of your email notifications.

Agents can use Markdown in ticket comments, in macros, and in their signatures. A Markdown how-to and reference is available in the Zendesk Agent Guide (see [Formatting ticket comments with Markdown](#)).

To use Markdown in your Zendesk, you must also enable the modern email template, which supports the Markdown rich text formatting.


Note: Markdown works in both the new and classic versions of Zendesk.

To enable the modern email template

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Settings** menu, then select **Channels > Email**.
2. In the **Email templates** settings section, click the **Enable Modern template** option. For more information about the new email template, see [Customizing your email templates](#).
3. Click **Save**.

After you've enabled the modern email template, you need to enable Markdown in your Zendesk.

To enable Markdown in your Zendesk

1. Click the **Manage** icon () in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Settings** menu, then select **Tickets**.
2. In the **Comments** settings section, click the **Agent comments processed by Markdown** option.
3. Click **Save tab**.

Adding an agent signature to ticket email notifications

You can specify an agent signature in all public ticket comments and outgoing messages. An administrator can add a common signature for all agents on the account. An agent can add a personalized signature.

Adding a common agent signature

An administrator can add a common signature for all agents on the account. For example, you can include your company name and tagline in all ticket comments and outgoing email notifications.

To add a common agent signature

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Agents**.
2. In the **Signature** text box, enter the signature text and any placeholders.

```
{{agent.signature}}
Love your Zendesk
```

For more information on placeholders, see [Using placeholders](#).

3. If you want to let agents add their own signature or add personal information to the common signature, include the `{{agent.signature}}` placeholder. It's included by default. See [Adding a personal agent signature](#).

Adding a personal agent signature

As an agent, you can add a personal signature to all your ticket comments and outgoing email notifications. The signature can include any text such as your name and position, your group, contact information, and so on.

Note: The ability to specify a personal signature can be disabled by an administrator.

To add a signature

1. In Zendesk, click your user icon in the upper-right corner and select **View Profile Page**.
2. Under **Signature** in the left sidebar, enter the signature text and any placeholders.

```
Regards ,
Jane Tolland
Customer Care Associate
{{agent.email}}
```

For more information on placeholders, see [Using placeholders](#).

Setting permissions to add CC's


You can give agents and end-users permission to copy (CC) people on tickets. For example, CC recipients receive copies of a notification email when the ticket is created, and then every time the ticket is updated. The CC recipients can also add comments to the ticket conversation.

People can be copied in ticket email replies or in the ticket view in Zendesk. For more information, see [Copying someone else \(CC\) on a ticket](#) in the Zendesk Agent Guide.

Copying people in ticket emails has the following limitations:

- You can CC a maximum of 8 end-users in emails to prevent spam scenarios. However, you add CC an unlimited number of agents.
- Only agents can delete CC recipients.
- Agent recipients receive all updates. End-user recipients only receive public updates.
- When CC'ing unknown end-users through email, new users are created automatically if your Zendesk doesn't require users to register.
- Any additional people listed on the "To" line of the email are added as CC recipients on the ticket.

To set CC permissions

1. Click the **Manage** icon () in the sidebar, then select **Tickets**.
2. To let agents add CC's to tickets, select **Enable CCs on Tickets**.
3. To prevent end-users from adding CC's to ticket email replies, select **Only Agents Can Add CCs**.

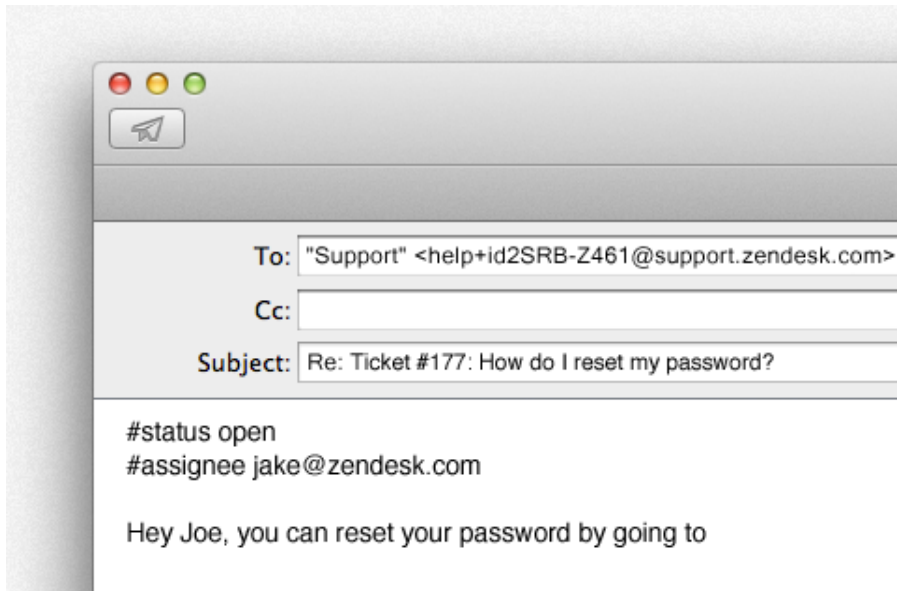
To let end-users add CC's in email replies, deselect this option.

4. To specify email addresses that should never be CC'ed, add them to the **CC Blacklist**. Use spaces to separate the addresses.
5. Save your changes by clicking **Save Tab**.

Updating ticket properties from your inbox

The mail API allows you to set properties on tickets by adding commands to the body of your email response to a Zendesk notification or to create a new ticket. Only agents can use the Mail API. If these commands are used by end-users, Zendesk will ignore them.

Here's an example of an agent reply to an email notification.



An agent can also create a new ticket by addressing a new email to the support email address of their Zendesk account and adding Mail API commands.

When Zendesk receives an email from an agent, we'll check to see if any commands are present at the top of the email, and execute the commands on the relevant ticket.

Note: You can only update an existing ticket by replying to an email notification for that ticket. In other words, you can't create a separate new email message and reference an already existing ticket. This is because Zendesk needs the ticket ID, which is contained in the Reply To email address (as shown in the graphic above).

Syntax

The Mail API simply scans the top of your email for the list of commands you want Zendesk to perform.

These commands follow this pattern:

```
#command value
```

If, for example, we wanted to set the status of a ticket, we can do so using this command:

```
#status solved
```

Each line should be separated by a new line. If we wanted to set the status and the assignee, for example, we can do:

```
#status solved
```

```
#assignee jake@zendesk.com
```

After this, you can simply put in your normal email content after your block of commands.

Short Syntax

For the more regularly used commands, we've added some quick and easy ways to use them, called short commands. These are usually one word commands that don't need a value. If they're supported by a particular command, they'll be highlighted below.

List of all Commands

Below is a list of all the supported commands you can add, one line by one line, in a response to a Zendesk email notification.

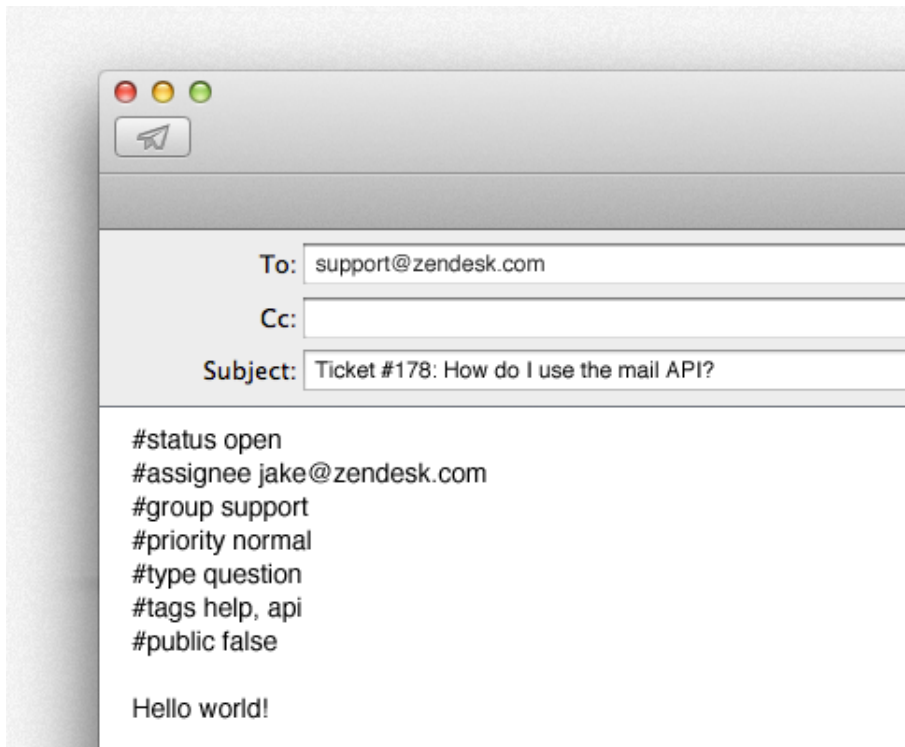
Command	Description
#status	Valid values are open, pending and solved. #assignee must be set in order to set a ticket to Solved. Short syntax: #open #pending #solved
#requester	Sets the requester of the ticket. This can either be the users ID in your account, or simply their email address. If they don't already exist in your account, Zendesk will create it for you.
#group	Assigns the ticket to a group. Valid values are the name of the group or the ID of a group.
#assignee	Assigns the ticket to an agent. Valid values are the email address of the assignee or the Zendesk ID of the assignee (obtained via e.g. a REST integration).
#priority	Sets the priority of the ticket. Valid values are low, normal, high and urgent. Note, in order to set a priority, you must also set a ticket type (see below) Short syntax: #low #normal #high #urgent
#type	Valid values are incident, question, task and problem. Short syntax: #incident #question #task #problem
#tags	Set any tag on the ticket, which can be separated by spaces or commas. Note that this sets the tags, removing all previously set tags on that ticket.
#public	Sets if a comment update on a ticket is public. Only usable when updating a ticket. The default value is true, meaning that anything else you put in the body of the email will be seen by the requester. Short syntax: #note (meaning private comment)

Invalid commands

If any invalid commands, or values, are given to Zendesk then that command or value will be ignored by Zendesk.

An example showing all of the commands

This example shows all of the commands.



The above example will do the following to ticket #178:

- Set the status to open
- Set the group to “Support” and the assignee to the agent with “jake@zendesk.com” as their email address
- Set the priority to “normal”
- Set the type to “question”
- Set the tags to “help” and “api”
- Set the visibility of the comment to “private”
- Add a new comment with “Hello world!” to the ticket, which combined with the above command will not be visible to the requester.

Sharing tickets with other Zendesk accounts

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

Ticket sharing allows you to assign tickets to affiliated Zendesk accounts 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 Zendesk account.

Here's how ticket sharing works:

- Any Zendesk account can invite another Zendesk account to establish a sharing agreement.
- The initiating Zendesk (referred to as the sender) sets the terms of the sharing agreement, which the receiving Zendesk 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 Zendesk account.
- The sender can only share a ticket with one other Zendesk. However, the receiver can share the ticket with a Zendesk that they have a sharing agreement with.
- A shared ticket becomes a new ticket in the receiver's Zendesk with a separate ticket ID.
- The ticket status, custom fields, and comments can remain synced between the ticket versions in both Zendesk accounts. The custom fields must be created in both Zendesk accounts (see [Syncing custom fields with another Zendesk account](#) below).
- Depending on the terms of the agreement, the receiver Zendesk may directly communicate with the ticket requester and solve the ticket.
- Each Zendesk account's business rules remain separate. For example, when a ticket is solved the status can be synced between the two Zendesk accounts, but when it is closed in each depends on their own business rules.
- A shared ticket cannot be merged with another ticket.
- A Zendesk account 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 Zendesk permission to work on your tickets. You can grant another Zendesk 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 Zendesk 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 Zendesk may be allowed to make public comments and directly interact with the requester, email notifications will link back to the Zendesk where the request was originally submitted.

The second option (private comments only and no status syncing) limits the other Zendesk 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 Zendesk and a sharing agreement to provide more details on issues related to the components they supply. In this scenario, the sender Zendesk controls the ticket from initial request through to resolution, gathering information as needed from the affiliated Zendesk.

Setting up a ticket sharing agreement

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

To create a ticket sharing invite

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Setting** menu, then select **Tickets**.
2. Select the **Ticket sharing** tab.
3. Select **Add Sharing Invite**.
 - The sharing invite looks like this:

Share tickets with another Zendesk account

Partner Zendesk domain .zendesk.com

Be careful to spell the subdomain correctly. If you don't know what the receiver's subdomain is, be sure to find out.

Comment and status permissions ⌵

Allow partner to make public comments and change the status, or allow only private comments but do not allow the syncing of the status. [Learn more](#)

Tag synchronization ⌵

Sharing tags can mean some custom fields are also synced; however, it may increase the number of tags in either account.

Allow the syncing of custom fields ⌵

Zendesk will sync custom fields of the same name and same values, between sender and receiver.

[Back](#)

4. Enter the name of another Zendesk account as the receiver subdomain.
5. Select the comment and status permission. You have two options:
 - Make public & private comments, sync status
 - Make private comments, do not sync status

6. Select the tag synchronization setting. You have two options:

- No, do not share tags between me and the receiver
- Yes, share tags between me and the receiver

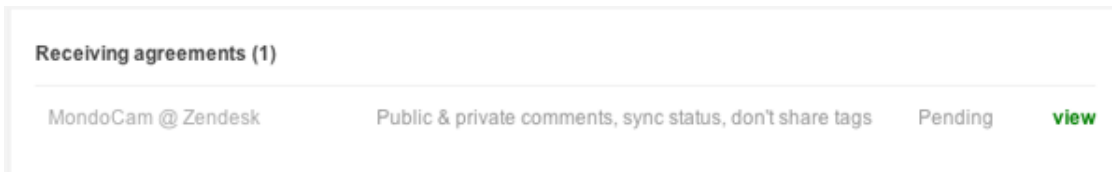
Note: As noted on the dialog box, enabling tag synchronising may add more tags to your Zendesk.

7. Select the custom fields syncing setting. You have two options:

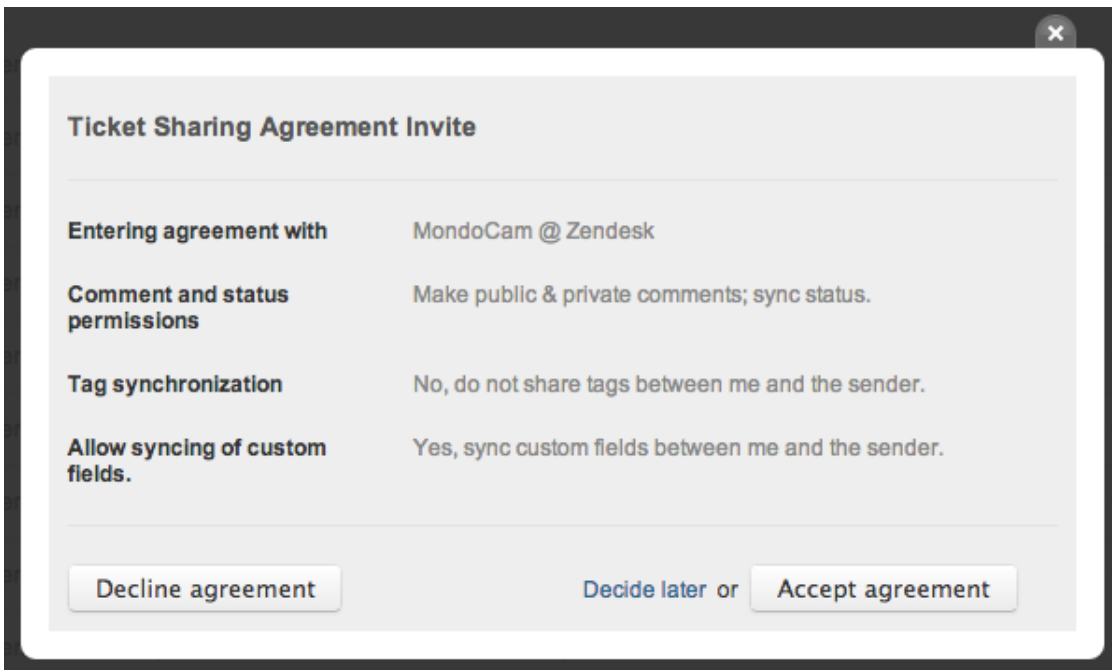
- No, do not sync custom fields between me and the receiver
- Yes, sync custom fields between me and the receiver

8. 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 Zendesk accounts 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 Zendesk accounts, 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.

Opting out of all sharing invites

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

To opt out of sharing invites

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Setting** menu, then select **Tickets**.
2. Select the **Ticket sharing** tab.
3. In the section **Opt out of sharing**, select the **Decline all sharing agreement invites**.
4. 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 Zendesk accounts are free to invite the other to accept a new sharing agreement.

To deactivate a sharing agreement

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Setting** menu, then select **Tickets**.
2. Select the **Ticket sharing** tab.
3. Locate the agreement you want to deactivate and then select **View**.
4. 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 Zendesk 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:

The screenshot shows a view configuration interface. At the top, there is a text input field containing 'Tickets from sharing'. Below this, the text 'Meet all of the following conditions:' is displayed. There are two rows of conditions, each with a red minus button to its right. The first row contains 'Ticket channel', 'is', and 'Ticket sharing'. The second row contains 'Status', 'Less than', and 'Closed'. At the bottom, there is a green plus button labeled 'Add condition'.

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 Zendesk, 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.

Syncing custom fields with another Zendesk account

As described in [Setting up a ticket sharing agreement](#), you can select to sync custom fields with another Zendesk. To make this work, each Zendesk must create the custom fields separately. For example, if you want to sync a custom field called "Camera model" it must exist in both Zendesk accounts and it must have the same title and data type.

The custom field title is not case sensitive so the sync will be successful even if one custom field is called "Camera model" and the other is called "Camera Model".

What is important to keep in mind is the data types used in each custom field; they must be compatible. The simplest way to ensure this of course is to use the same data type for each. In our example, both versions of "Camera model" are drop-down lists.

Note: It's possible to sync data between different kinds of custom fields if they both support the same type of data. For example, it's possible to sync a drop-down list with a text field since both contain a text string. This is not recommended but is mentioned here so that you're aware of the compatibility.

If an incompatibility between custom fields does exist, the ticket will sync but the incompatible custom fields will fail (no data will be transferred).

Using business rules to share tickets (Enterprise)

In the standard version of ticket sharing, sharing agreements can be created between Zendesk account and agents can manually share tickets to another Zendesk. In the Enterprise version of Zendesk, you can create business rules that automatically share tickets with another Zendesk. This is key to enabling multi-brand management (see [Setting up to manage multiple brand Zendesk accounts](#)). However, its use is not restricted to multi-brand management. It's equally useful in simply sharing tickets with another Zendesk.

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 Zendesk accounts, you can select the name of the Zendesk to automatically share tickets with.

Trigger title

Share tickets to Kongen Image Sensors

Meet **all** of the following conditions:

Ticket is... Created

Tags Contains at least one of the following image_sensor

Add condition

Meet **any** of the following conditions:

-- Click to select condition --

Add condition

Perform these actions:

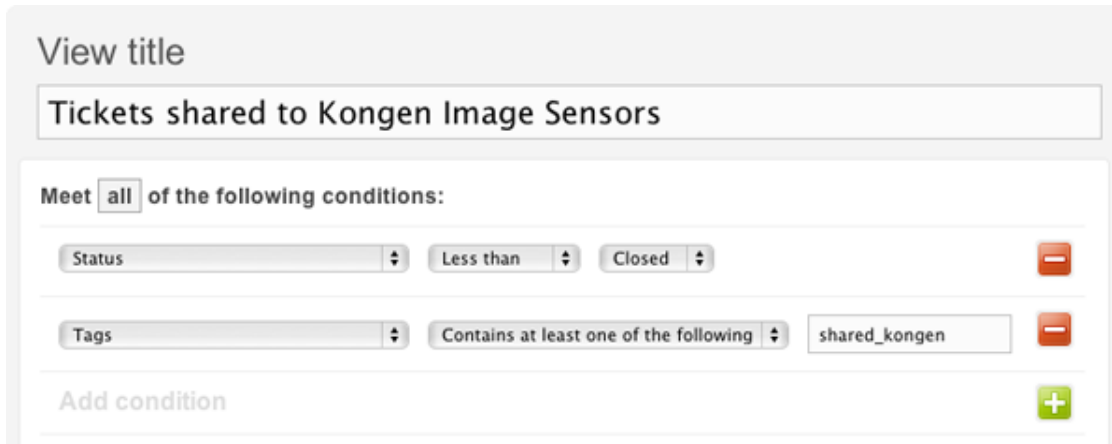
Share ticket with Kongen Image Sensors @ Zendesk

Add tags shared_kongen

Add action

You can of course use any number of conditions as the criteria for sharing tickets with a specific Zendesk account. 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 Zendesk account 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 Zendesk account when sharing tickets. This of course can be done manually via a macro or in a trigger, as in the example above.

Archiving ticket email notifications (Enterprise)

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 your Zendesk. This can be set up by an administrator.

To set up email archiving

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Setting** menu, then select **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.

Chapter 5

Channels

- *About Zendesk channels*
- *Setting up Zendesk Voice*
- *Setting up your Feedback Tab channel*
- *Setting up your Facebook channel*
- *Setting up your Twitter channel*
- *Using your Twitter saved searches to monitor and manage tweets*
- *Zendesk for Twitter advanced search operators*
- *Setting up your Chat channel*
- *Enabling screencasting in your Zendesk (Plus and Enterprise)*

About Zendesk channels

Channels are the ways that you engage with your customers (how they create support requests and how you communicate with them). You choose and configure the channels you want your help desk to support. Regardless of the channel by which new support requests are submitted, all requests become tickets that agents manage in the help desk.

Zendesk provides the following channels:

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

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

Email

The Zendesk email channel enables customers to send email directly to your support email address (for example, `support@mycompany.zendesk.com`). Email you receive into your help desk becomes tickets. 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.

support@myaccount.zendesk.com
help@myaccount.zendesk.com
sales@myaccount.zendesk.com
billing@myaccount.zendesk.com

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.

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

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. 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.

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.

You can also set up help desk business rules to generate automatic email replies at each stage in the workflow, such as updating the ticket, solving the ticket, and so on.

For more information about configuring your email channel, see [Getting started with email in Zendesk](#) *Getting started with email in Zendesk*.

Web portal

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

Mondocam login | sign up

HOME FORUMS SUBMIT A REQUEST CHECK YOUR EXISTING REQUESTS ENGLISH

Welcome to MondoCam Customer Service!

Stay updated with announcements, get answers from the community and share your feature suggestions with us. You can also submit a request or send us an email at support@mondocameras.com.

Contact us

+1 (415) 347-8709
+33 9 75 18 21 56

Forums

Mondocam

About Us
Pete Attie December 02, 2011 • Customer content / Articles / FAQs

Locations

- San Francisco
- Chicago
- Miami

Contact

- Tel.: +1-866-435-3118
- E-Mail: support@mondocam.zendesk.com

Map of our HQ

Map Sat Ter Earth

©2012 Google - Map data ©2012 GMS, Google, View Larger Map

Overview | Recent

Customer content »

Articles / FAQs (20) »

- How To Set The White Balance on the XD-80
- About Us
- Adjusting F-stop in your DSLR camera

Questions from the Community (14) »

- How do I know if I have a counterfeit lithium-ion battery?
- How do I install the Digital Camera Solutions Disk software?
- First lenses for a new camera?

Ideas / Feature Requests (6) »

- Underwater Housing for DSLRs
- We want Moodle emails to go to our personal accounts
- Remote printing

Announcements (1) »

- Changing the exposure settings on the Mondocam 2000+

Announcements (0) »

No topics found - [Add Article »](#)

The Web portal offers customers two main ways to get help: the support request web form and the forums. The support request form enables customers to submit support requests to you and get direct help from your support team. Forums enable customers to *self-serve*, by giving them information, and potentially answering their questions, before they contact your support team

You can see the Web portal from a customer perspective when you are logged out or when you assume the identity of an end-user. When you sign in as an administrator or agent, the navigation changes and the page is customized for the support team to manage tickets.

You control the look and feel of your Web portal and you can optimize it to meet the needs of two different groups: customers and agents. For information about customizing your web portal, see .

Twitter

The Zendesk Twitter channel enables you to monitor and respond to your Twitter community from your help desk. Your help desk can monitor one or more Twitter accounts and convert tweets to tickets, called *twickets*. All tweet activity between agents and Twitter users is added as ticket comments.

Using the Twitter channel, you can do the following:

- Create Twitter searches using keywords to monitor references to your business, products, and services
- Use your saved searches to convert tweets to tickets and retweet messages
- Convert a tweet into a ticket and respond to the user with a tweet, a direct message, or move the conversation to email
- Bulk convert multiple tweets into tickets in one step
- Convert tweets to tickets outside of Zendesk by favoriting a tweet in twitter.com and many other Twitter clients
- Automatically capture public mentions and direct messages as tickets
- Append ticket links to outgoing tweets
- Set one of your Twitter accounts as the primary so that all outgoing tweets come from one Twitter account

Only administrators have access to the incoming tweets; however, once they've been converted to tickets all agent types have access to them unless you've otherwise restricted their access to certain types of tickets (by restricting them to an organization, or by customizing Enterprise agent roles to exclude this permission, for example).

Tickets created from tweets are also referred to as *twickets* and you'll see that word used in our documentation as shorthand for 'tickets created via a tweet'. It's important to note however that once a tweet becomes a ticket it behaves just like any other ticket in your help desk. The one exception to this is that you have a number of Twitter specific options for replying back to the Twitter user. You can reply with a tweet or your reply can be a direct message, which is private message back to the user.

For information about setting up your Twitter channel, see [Setting up your Twitter channel](#)[Setting up your Twitter channel](#). For information about converting tweets to tickets, see [Using your Twitter saved searches to monitor and manage tweets](#)[Using your Twitter saved searches to monitor and manage tweets](#).

Chat

The Zendesk Chat channel enables customers to initiate live chat with an agent. Chat sessions become tickets that agents can update during the chat or afterwards.

Customers can send chat requests from existing tickets or from the Feedback Tab (if implemented). From a customer's perspective, the chat functionality is similar to other chat clients, such as MSN Messenger, AIM, Google Talk, or Facebook Chat.

Agents make themselves available for chat. The number of chats that a help desk can accept at one time depends on the number of agents who are available and the number of chats that each agent can accept (you determine the chats-per-agent number when you set up chat). If no agents are available for chat, the customer will not have the option to chat.

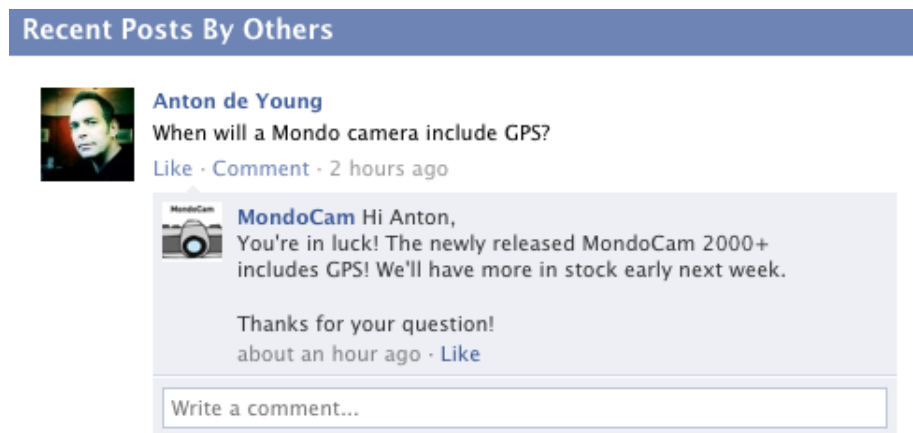
For information about setting up your Chat channel, see [Setting up your Chat channel](#). For information about using chat, see [Providing live chat support with Zendesk Chat](#).

Facebook

The Zendesk Facebook channel enables customers to make support requests using Facebook, and it enables your agents to see and respond to customer Wall (Timeline) posts and comments from within your help desk.

Starter plans can add one Facebook Page to your Facebook channel, and Plus and Enterprise plans can add two Pages. You have to be an administrator (or have appropriate role permissions) to set up the Facebook channel.

When you add a Facebook Page to your Facebook channel, your help desk monitors that Page. So users make Wall posts on that Page as they normally do.



The screenshot shows a Facebook interface. At the top, there is a blue header with the text "Recent Posts By Others". Below this, a user profile for "Anton de Young" is shown with a small profile picture. The user has posted the question "When will a Mondo camera include GPS?". Below the question are the options "Like · Comment · 2 hours ago". A response from "MondoCam" is shown in a light blue box. The response includes a small profile picture for MondoCam, the text "Hi Anton, You're in luck! The newly released MondoCam 2000+ includes GPS! We'll have more in stock early next week.", and "Thanks for your question! about an hour ago · Like". At the bottom of the response box is a text input field with the placeholder text "Write a comment...".

And each Wall post automatically becomes a support ticket in your help desk.

The screenshot shows a Facebook post titled "When will a Mondo camera include GPS?" from Anton de Young (Facebook page) on a Facebook Page, posted today at 14:08. The post has 2 comments and an events button. Below the post is a reply form with a "Reply" button, a "Private Note" option, and a text input field. There are also "Recipients" icons and an "Attach file" link. A checkbox option "Reply as a public comment in Facebook" is visible. Below the reply form is a comment from Jennifer Rowe, posted today at 14:41, which says: "Hi Anton, You're in luck! The newly released MondoCam 2000+ includes GPS! We'll have more in stock early next week. Thanks for your question!". Below that is a comment from Anton de Young, posted today at 14:08, which says: "When will a Mondo camera include GPS?".

When a user adds a Wall post on your Facebook page, that user becomes a new user in your help desk and the Wall post becomes a new ticket in your help desk. You can set up a Facebook view if you want to see all your Facebook tickets in one place.

Any new comments to the Wall post are added to the ticket as additional comments. Agents can respond directly to a Wall post by adding a public comment to the support ticket. The comment will also appear on the associated Facebook Wall post.

In addition to Wall posts, any private messages sent to the Facebook Page become tickets in your help desk. This means that a user can ask a private question, and an agent can have a one-on-one conversation with the user. Users click the Message button on your Facebook Page to send a private message.

The screenshot shows the Facebook page for MondoCam. The profile picture is a camera icon. The page name is "MondoCam" with "2 likes" below it. There is an "Add a Cover" button. Below the name are buttons for "Liked", "Message", and a settings icon. The bio reads: "Retail and Consumer Merchandise. MondoCam sells high-end camera equipment and accessories. We also provides training and technical advice!". There are tabs for "About", "Photos", and "Likes". The "Likes" tab shows a thumbs-up icon and the number "2".

For information about setting up your Facebook channel, see [Setting up your Facebook channel](#).

Voice

The Zendesk Voice channel integrates live telephone support into your help desk. You select a telephone number for incoming calls and set the call queuing options and recorded greetings. You can also customize call greetings.

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. Agents can answer calls through the web browser or they can forward calls to another number.

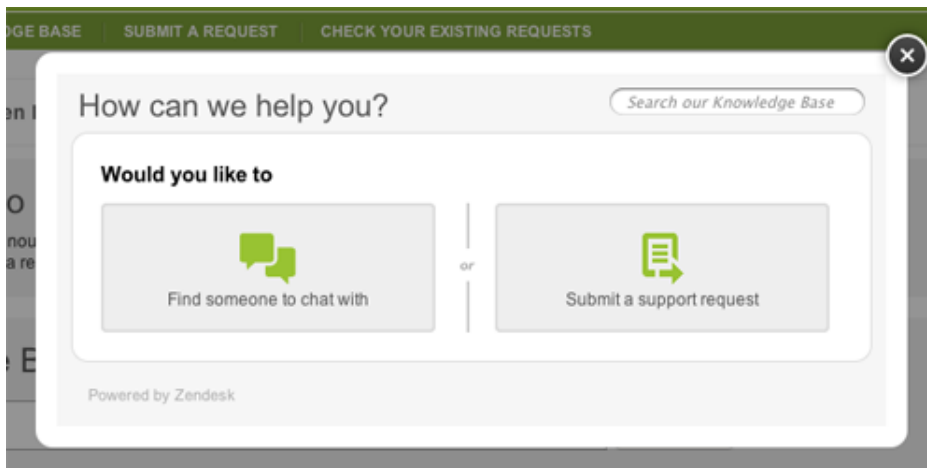
For information about setting up your Voice channel, see [Setting up Zendesk Voice](#). For information about using voice, see [Taking inbound telephone calls with Zendesk Voice](#).

Feedback Tab

The Zendesk Feedback Tab is essentially a small and portable version of the Web portal that you can embed in any Web site, including your Zendesk help desk. It can be configured to allow your end-users to search your knowledge base, submit a support request, or live chat with your agents.



When users click the tab, they are presented with support options (the options depend on how the tab is configured).



You can create as many Feedback Tabs as you need. The tab (both words and color) can be customized and branded, as can the Feedback Tab support request form.

For information about setting up your Feedback Tab, see [Setting up your Feedback Tab channel](#).

API

If you're a developer, you can access Zendesk functionality through the Zendesk API. For example, you can create a new ticket using the API instead of using channels such as email, the web portal, or Twitter. The API lets you integrate Zendesk features in your own applications.

The Channels > API page lets you enable the API and lists your authentication credentials. Only authorized users can access Zendesk through the API. You can use basic authentication with your username and password, or use your username with your API token.

For information on using the API, see the following pages:

- [REST API and introduction](#)
- [Zendesk API forum](#)

You can also build Zendesk apps. A Zendesk app lets you add third-party functionality to Zendesk. This is different from the Zendesk API, which lets you do the reverse -- add Zendesk functionality to third-party applications. A Zendesk app usually makes calls to a third-party API instead of the Zendesk API.

Apps can help your agents provide better support to customers. For example, an app can retrieve information about a user's recent purchases from your company's back-end system, and then display the information on a ticket in Zendesk.

For information about building apps, see the following pages:

- [Introduction to Apps](#)
- [Apps Reference](#)
- [List of third-party apps](#)
- [Zendesk integrations forum](#)

Setting up Zendesk Voice

The Voice channel integrates live telephone support into your Zendesk. 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 maximum length of voicemail recordings is 2 minutes.

The Zendesk Voice incoming call workflow is described in [Taking inbound telephone calls with Zendesk Voice](#) in the Zendesk Agent Guide.

In the new version of Zendesk, your agents can also make outbound calls. The outbound call workflow is described in [Making outbound telephone calls using Zendesk Voice](#) in the Zendesk Agent Guide.

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.

This article covers the following topics:

- [Voice trial, subscription, and billing](#)
- [Selecting a telephone number](#)
- [Enabling the voice channel and configuring the general settings](#)
- [Selecting voice greetings](#)
- [Routing calls to specific groups](#)
- [Using the call activity dashboard](#)
- [Reviewing call history](#)
- [Selecting a browser or a phone to take calls](#)
- [Testing your voice channel](#)
- [Setting up business rules to track and manage voice tickets](#)
- [Agents allowed to accept phone calls](#)
- [Recovering a voice number](#)
- [Adding more voice numbers](#)
- [Editing your Voice number settings](#)

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.

Zendesk Voice is billed separately from your Zendesk subscription. 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.

You can find all the Voice pricing information in [Zendesk Voice pricing](#).

To subscribe to Zendesk Voice

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. In the Subscription tab that opens by default, select the **Zendesk Voice** option, then click **Continue**.
3. Enter your credit card information, then click **Submit Credit Card**.

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. You can select from the following numbers in the following countries:

- Local or toll-free (freephone) phone numbers in the US, Canada and the UK.
- National numbers in these countries: Austria, Australia, Belgium, Denmark, Finland, France, Hong Kong, Ireland, Italy, Japan, Netherlands, New Zealand, Poland, Portugal, Spain, Sweden.

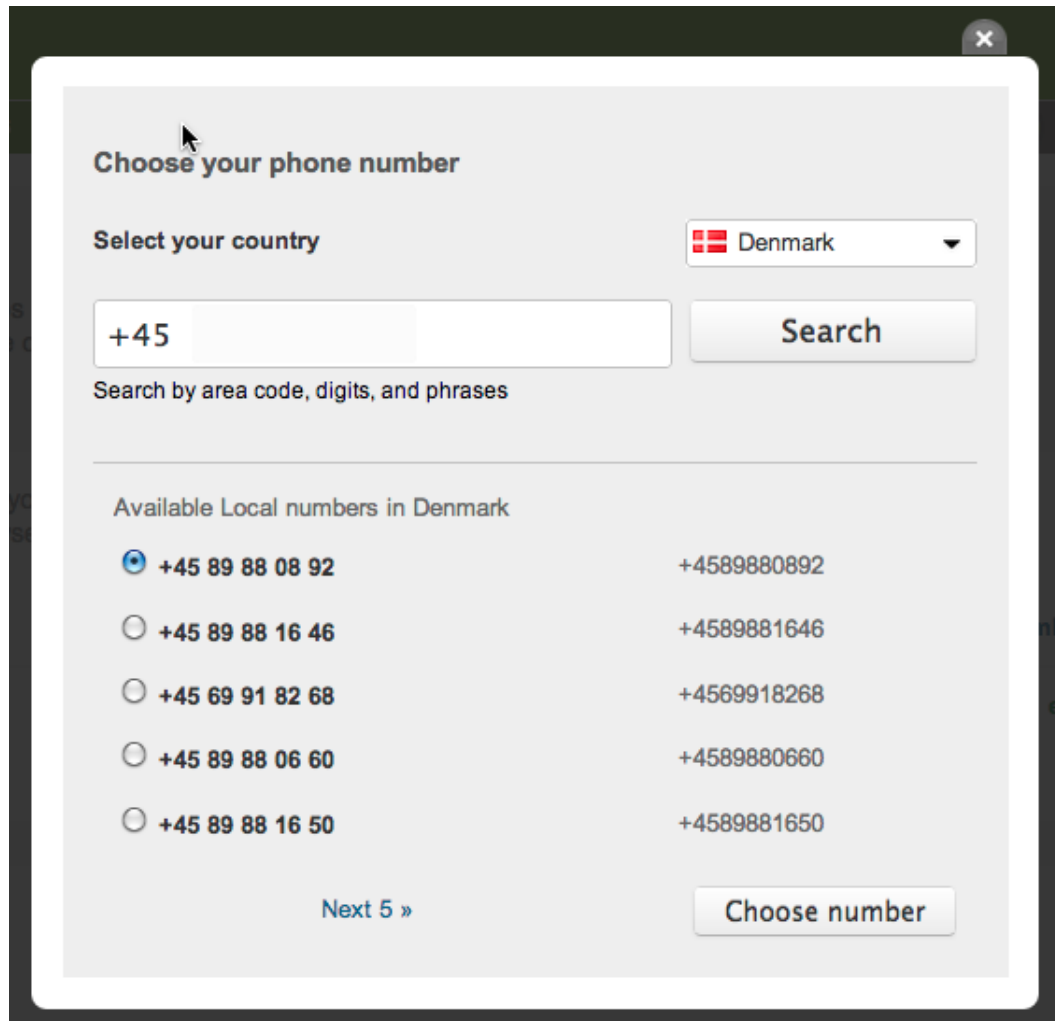
If you have an existing telephone number that you already use for support, you can forward that number to the Zendesk voice number.

To select a Zendesk voice telephone number

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Voice**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Voice > Edit**.
2. To select a telephone number, click **Choose a phone number for your Zendesk**.



3. Select a country and area code (if applicable) and then click **Search**. You can also search for phone numbers containing specific sequences of letters or numbers.



Choose your phone number

Select your country Denmark

+45 Search

Search by area code, digits, and phrases

Available Local numbers in Denmark

<input checked="" type="radio"/> +45 89 88 08 92	+4589880892
<input type="radio"/> +45 89 88 16 46	+4589881646
<input type="radio"/> +45 69 91 82 68	+4569918268
<input type="radio"/> +45 89 88 06 60	+4589880660
<input type="radio"/> +45 89 88 16 50	+4589881650

[Next 5 »](#) Choose number

4. Select a phone number and then click **Choose Number**. Note that your phone number is free while you are in trial but cannot be changed. To change your phone number or add an additional number, you must add Zendesk Voice to your account's subscription.
5. Accept the Zendesk Voice terms and conditions and then click **Purchase this number** and then **Finish**.

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

Channels / Voice

Capturing voicemail and live call recordings helps agents qualify and respond to support requests quickly and accurately. Add a phone number to your account to capture phone calls with the rest of your support requests. [Learn more](#)

General Settings
Numbers
Greetings
Call Activity
Call History

Enable Voice? Yes No

Enabling Zendesk Voice allows agents to make themselves available to answer calls. Your phone number can accept voicemail with this setting disabled.

Allow outbound calls? Yes No

Agents can place outbound calls to customers. Outbound calling is only available in the new Zendesk interface.

Maximum queue size

New calls that exceed this limit are directed to voicemail.

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**. This enables you to receive inbound calls. If you want to also make outbound calls (available only in the new version of Zendesk), select the **Allow outbound calls?** option. You'll also want to configure the following voice settings.

Voice setting	Description
Maximum queue size	<p>Your call queue size determines how many incoming calls will be kept waiting for an available agent before being sent to voicemail.</p> <p>You can select one of the following queue sizes:</p> <ul style="list-style-type: none"> • 0 • 2 • 5 • 10 • 15
Maximum queue wait time	<p>Callers who wait longer than the time specified in the maximum queue wait time are sent to voicemail.</p> <p>You can select one of the following wait times:</p>

Voice setting	Description
	<ul style="list-style-type: none"> • 1 minute • 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?	<p>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.</p> <p>If you haven't already done so, you can configure your business hours (see Setting your business hours).</p>
Agent wrap-up after calls?	<p>This option gives agents time to finish making notes in a ticket before they take another call. Agents can take as much time as needed, then click an option in the call console when they are ready to become available for another call.</p> <p>If your agents are answering calls while they are away from their computers, or if they don't need extra time after calls, you can disable this setting. When this option is disabled, agents are immediately available for the next call when they finish a call; they do not need to click an option to become available.</p> <p>Support tip! Check out what our support advocate Max says about this option in The Call Center Unplugged.</p>
Agent confirmation when forwarding?	<p>When agents forward calls to their phones, this option requires agents to press a key before the call is connected to indicate that a person is answering the call and not an automated voicemail. This prevents calls from forwarding to an agent's personal voicemail if they do not answer. Forwarded calls not answered with a key confirmation are routed to the voicemail system and recorded in a ticket.</p> <p>If your agents forward calls to a phone system where personal voicemail boxes are not an issue, you can disable this option so that agents are immediately connected to callers when they answer.</p>
Allow UK mobile agent number forwarding	This option allows agents to forward calls to UK mobile phone numbers. Calls forwarded to UK mobile phone numbers incur a higher cost per minute than US numbers. For pricing information, see the Forwarding Rates section in Zendesk Voice pricing .

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 tell users that an agent will answer shortly, and also hold music while users wait for an available agent.

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

For Regular, Plus, and Enterprise, if you have multiple phone numbers, you can apply different greetings to each number. This enables you to offer a branded or localized experience for each phone number.

To create a custom greeting

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Voice**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Voice > Edit**.
2. Select the **Greetings** tab.
3. Click **Add greeting** in the upper-right corner.



4. Enter a name for your greeting, select the kind of greeting, and select phone numbers you want to use this greeting for, if you have multiple numbers.
5. In the Greeting settings page, click **Record** to create your custom greeting.
6. Click **Record using a phone** or **Upload an audio file**.
 - If you selected to use a phone, enter or confirm your telephone number, then click **Call and record**. You'll receive a call at this number prompting you to record and save your new greeting.
 - If you selected to upload a prerecorded 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.
7. In the Greeting settings page, click **Update greeting**.

You can manage your active and inactive greetings for each phone number in the **Numbers** tab.

To manage your greetings

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Voice**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Voice > Edit**.
2. Select the **Numbers** tab.
3. Click **Edit** beside the number you want to change greetings for. (You might have to scroll to the right to see it.)

4. Select a greeting from the drop-down menu to change your **Voicemail greeting**, **Available agents greeting**, or **Wait greeting**.

You can click the Play button to hear any of the greetings. If you need to create more greetings, do so in the **Greetings** tab.

5. Click **Update phone number settings** when you are finished.

Routing calls to specific groups

On Regular, Plus, and Enterprise, you can route all calls for a phone number to a specific group or to a set of groups in Zendesk.

When a customer calls the phone number, the call will only route to agents in the assigned group. If more than one group is selected, the call will route to agents in the primary group first, then to agents in the secondary groups in a round-robin fashion.

If no agents are available in any group, or if the queue wait time is exceeded, the call goes to voicemail. The resulting voicemail ticket is assigned to the primary group.

To manage your greetings

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Voice**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Voice > Edit**.
2. Select the **Numbers** tab.
3. Click **Edit** beside the number you want to change greetings for. (You might have to scroll to the right to see it.)
4. In the **Group routing** section of the Voice settings page, select one or more groups.

Voice Settings +1 (800) 123-4567

Wait greeting Old Holiday Greeting ▾ ▶ Play

If a caller is waiting for an available agent, they will hear this recording after they hear the available agents greeting.

Group routing Route calls to this phone number to the selected groups below.

Managers

4 agents

✔

Support

5 agents

Default Group Managers ▾

The default group is used when a call goes to voicemail.

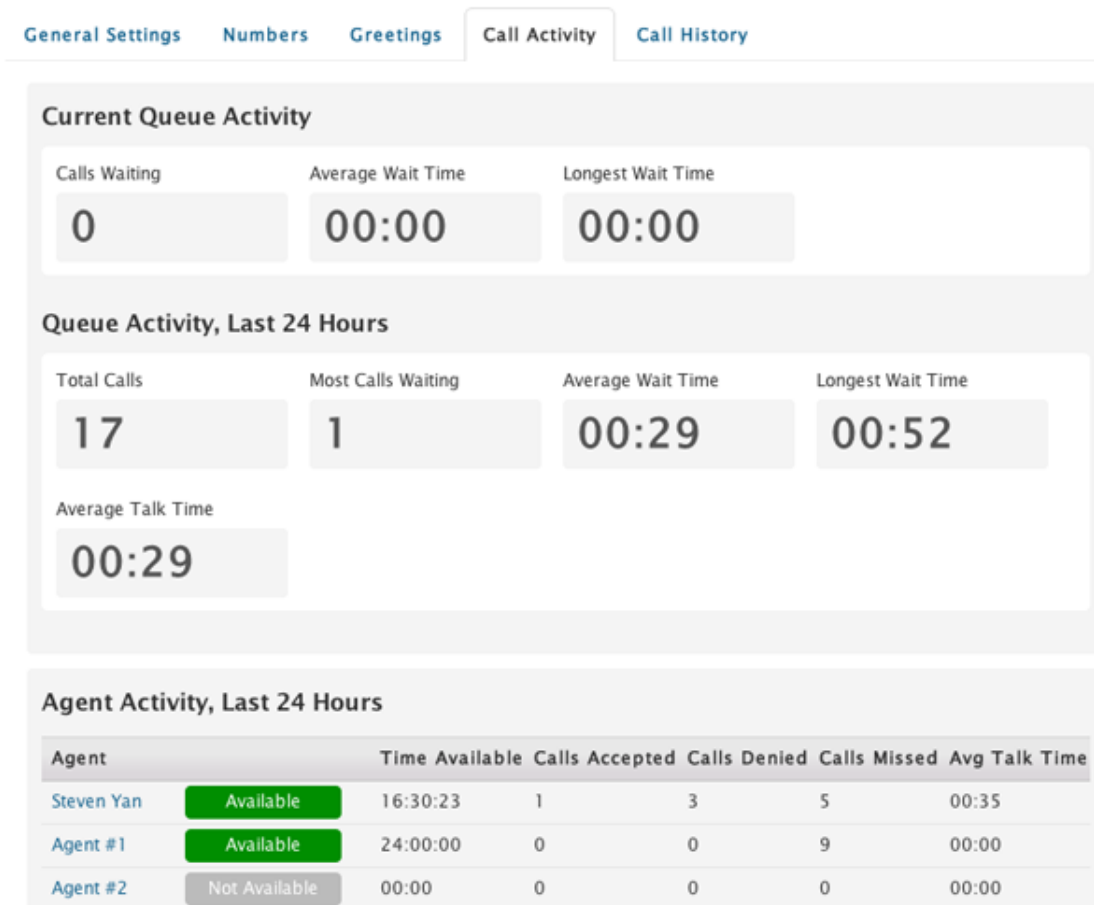
5. If you selected multiple groups, choose a **Primary group** from the drop-down menu.

Calls will be routed to the primary group first, then to secondary groups. If no agents are available, the resulting voicemail ticket is assigned to the primary group.

6. Click **Update phone number settings** when you are finished.

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.
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 Zendesk. 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 screenshot shows the 'Call History' tab in the Zendesk interface. At the top, there are navigation tabs: General Settings, Numbers, Greetings, Call Activity, and Call History. Below the tabs, there is a date range selector set to 'Jul 18 to Present' and an 'export to csv' link. The summary section displays the following statistics:

Minutes used in this period	Voicemails	Calls	Credits used in this period	Credits remaining
331	39	272	\$14.57	\$13.62

Below the summary is a table of call records:

ID	Ticket ID	Date/Time	From	To	Agent	Call Status	Minutes	Charge
3676		December 14, 2012 14:41	+1 (415) 418-7524	Browser		Abandoned	1	\$0.003 (more)
3687		December 14, 2012 02:04	+1 (408) 314-8190	+1 (415) 418-7524		Abandoned	1	\$0.013 (more)
3682		December 14, 2012 02:03	+1 (408) 314-8190	+1 (415) 418-7524		Abandoned	1	\$0.013 (more)

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.
Ticket ID	The ticket number generated from a completed Voice call.
Date/Time	The date and time the call was received.
From	If the caller has already been added to your Zendesk 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'.
To	This is either your Zendesk Voice support number or the agent's telephone number.
Agent	This is either the name of the agent who answered the call or, if the call was unanswered, 'voicemail' is displayed.
Call Status	Abandoned or Completed. Abandoned means that the user hung up the phone or was otherwise disconnected. As a result, no ticket is created. Completed means that the call was completed and a new ticket was created (a link to the ticket number is added to the Ticket ID column).
Minutes	The total number of minutes the call lasted.
Charge	The total charge for the call.

Exporting your call history as a CSV file

You can export your call history to a CSV file that can be opened in spreadsheet application. The CSV file includes all calls made to your Voice channel and contains the same data that is shown in the table above.

To export your call history as a CSV file

1. In the **Call History** tab select **Export to CSV** in the upper left corner.
2. The CSV file will be built and you'll receive an email notification that contains a download link.

Selecting a browser or a phone to take calls

Agents can choose to take calls with a phone or with a web browser:

- [Selecting a web browser](#)
- [Selecting a phone](#)

Selecting a web browser

Agents can take calls with a web browser running on a computer equipped with a microphone.

Note: Calling rates still apply because incoming and outgoing calls are still routed through Zendesk.


The web browser that an agent uses may affect audio quality. Zendesk recommends Google Chrome for the best experience. Chrome relies on browser-native audio compression and streaming capabilities known as *WebRTC*, or web real-time communications. The standard is currently only supported by Chrome.

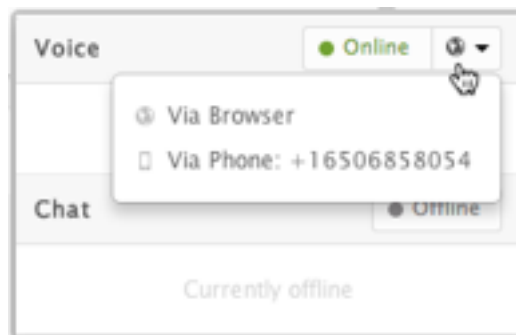
The WebRTC standard provides better audio quality for the agent in terms of hearing a call as well as speaking to a customer. Another benefit is that it relies on the computer's audio settings for adjusting the microphone's volume.

Agents can use another browser such as Firefox, Safari, or Internet Explorer, even if the browser doesn't currently support the WebRTC standard. The browser in that case uses the Adobe Flash browser plugin to compress and stream audio.

Note: The Flash plugin is used by all browsers with Zendesk Classic.

To select a browser to take calls

1. Log into Zendesk in the browser you want to use.
2. Click the Voice icon () on the right side of the toolbar.
3. In the Voice console, click the globe icon and then select **Via Browser**.



Regardless of the browser or technology used to stream audio, each agent must grant permission to Zendesk to use their computer microphone. The agent can grant permission while accepting the first call to the browser, or by using the Voice console.

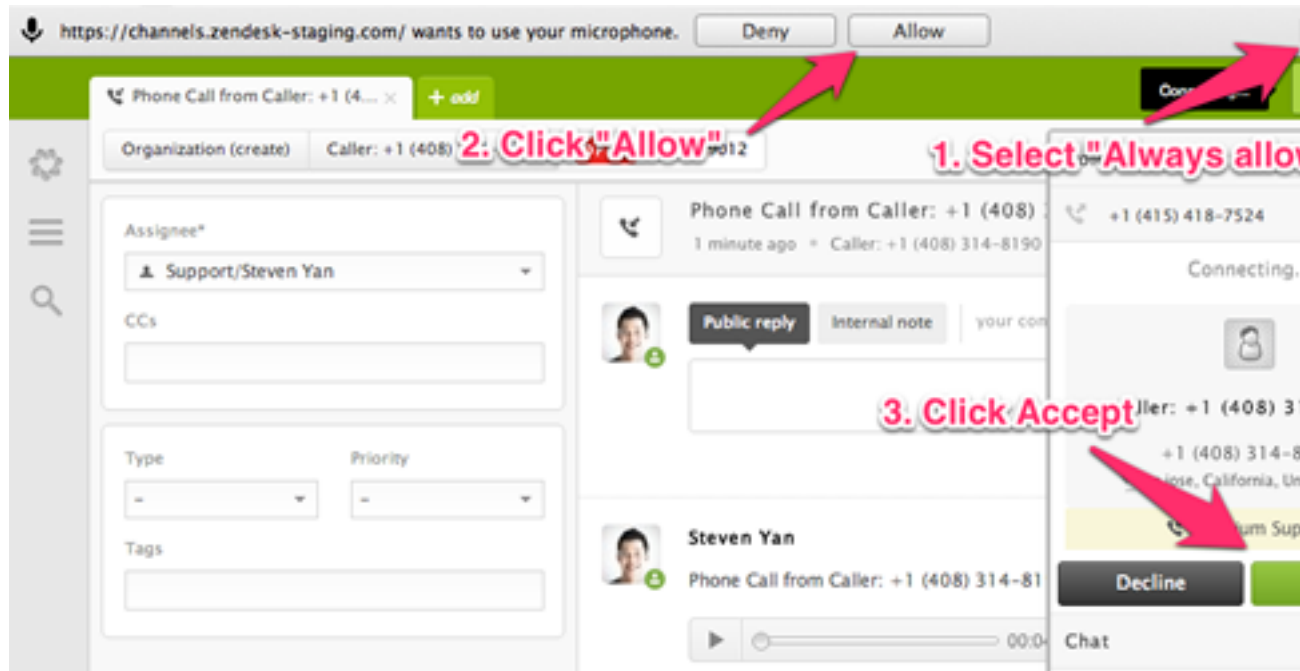
To grant microphone permission while accepting the first call

1. When prompted, grant permission to Zendesk to always use your microphone.

Depending on your browser, the prompt may be a pop-up browser toolbar or an Adobe Flash dialog box.

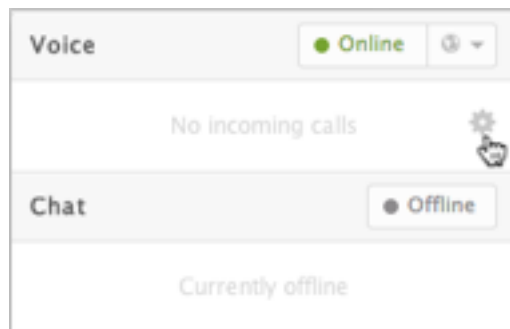
2. Click **Accept** to accept the call.

In Chrome, the process is as follows:



To grant microphone permission with the Voice console

1. In Zendesk, click the Voice icon (📞) on the right side of the toolbar.
2. Click the **Settings** (gear) icon in the Voice console.



3. When prompted, grant permission to Zendesk to always use your microphone.

Depending on your browser, the prompt may be a pop-up browser toolbar or an Adobe Flash dialog box.

Selecting a phone

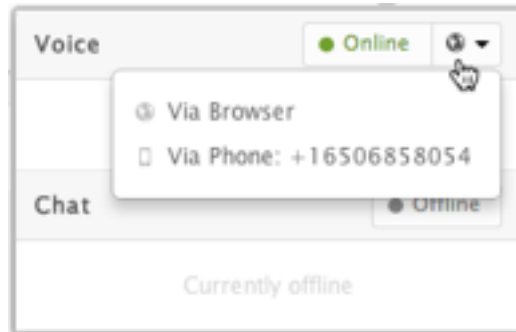
Agents can forward calls to a forwarding telephone number specified in their user profile. The forwarding number is never visible to callers.

To select a phone to take calls

1. In Zendesk, click your user icon on the right side of the toolbar and select **View Profile Page**.
2. In the **Agent Forwarding** field in the left sidebar, enter a phone number where you can be reached.

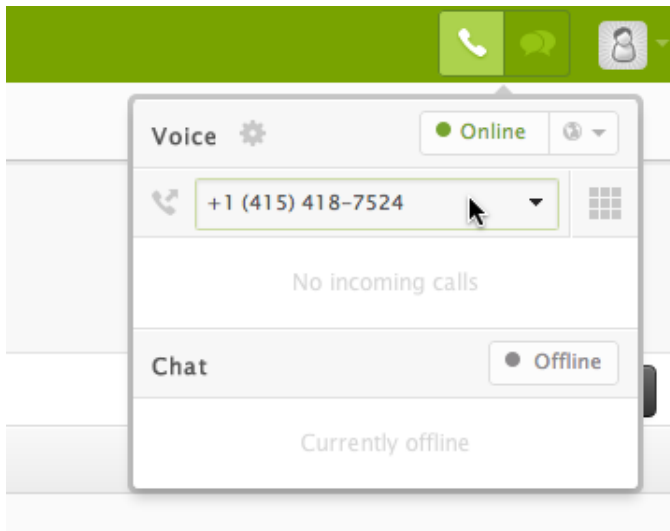


3. Click the Voice icon (📞) on the right side of the toolbar.
4. In the Voice console, click the globe icon and then select **Via Phone**.

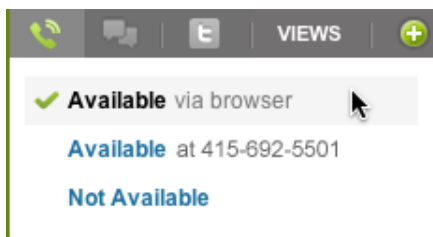


Testing your voice channel

You can test your new support phone number selecting your availability and then calling the number. When you enable the Zendesk Voice channel, the **Voice** icon is added to top toolbar.



Zendesk Classic: The voice menu is added to the top menu bar.



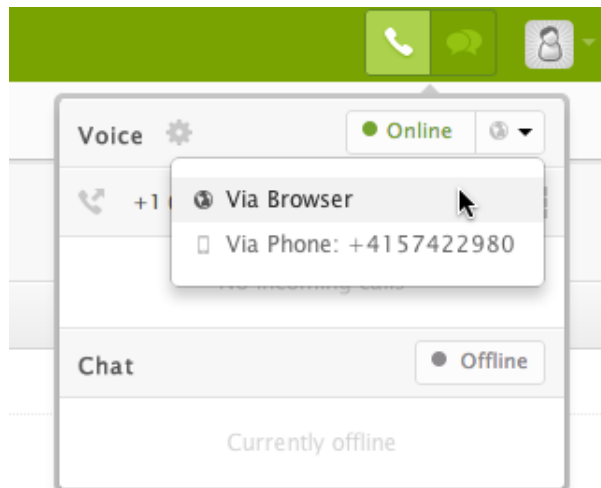
Each availability option allows you to test different aspects of using the voice channel. The first option directs the call to the browser. The second availability option forwards the call to the telephone number in your user profile (this number is never visible to callers). When **Not Available** is selected, the call is sent directly to voicemail or routed to the next available agent.

To test voicemail

1. Click the **Offline** button.
 - Zendesk Classic:** Click the **Voice** icon, then 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. Click **Online**, then click the drop-down icon next to the **Online** button. Select **Via browser** .
 - Zendesk Classic:** Click the **Voice** icon, then select **Available via browser**.
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 [Taking inbound telephone calls with 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)** or **Ticket channel is Phone call (outgoing)**.

View title

New voice tickets

Meet **all** of the following conditions:

Status Is New

Add condition

Meet **any** of the following conditions:

Ticket channel Is Voicemail

Ticket channel Is Phone call (incoming)

Add condition

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 Voice has been enabled for your Zendesk. In the Enterprise version of Zendesk, you can choose the agent roles that are allowed to use it. By default, all the predefined 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](#).

Recovering a voice number

Your voice number is removed from your account when your trial expires, your Zendesk Voice subscription is cancelled, or your account is suspended or deleted.

Within 72 hours, you can contact Zendesk Support to reinstate your voice number, if you have resolved the issue with your account. After that timeframe, you might be able to recover your voice number. You can contact Zendesk Support to find out.

To recover your voice number

- Submit a support request to Zendesk Support at support.zendesk.com.

Adding more voice numbers

Regular, Plus, and Enterprise accounts can add more telephone numbers to Zendesk Voice. Calls to all phone numbers will be added to the same call queue. You might want to add more numbers to provide your customers with a toll-free support number or to add more local telephone numbers. As Zendesk Voice currently supports transcription in English only, transcription can be enabled/disabled per phone number (see [Editing your Voice number settings](#) below).

To add another Voice number

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Voice**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Voice > Edit**.
2. Select the **Numbers** tab.
3. Click Add phone number and follow the same steps you did when setting up your initial voice number (described above in [Selecting a telephone number](#)).

Editing your Voice number settings

For each of your Voice numbers, you can set a nickname (to distinguish between your different voice numbers) and also enable or disable text transcription.

Note: Text transcription is available in English only.

To edit your Voice number settings

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Voice**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Voice > Edit**.
2. Select the **Numbers** tab.
3. Next to the number you want to edit, click **Edit**.

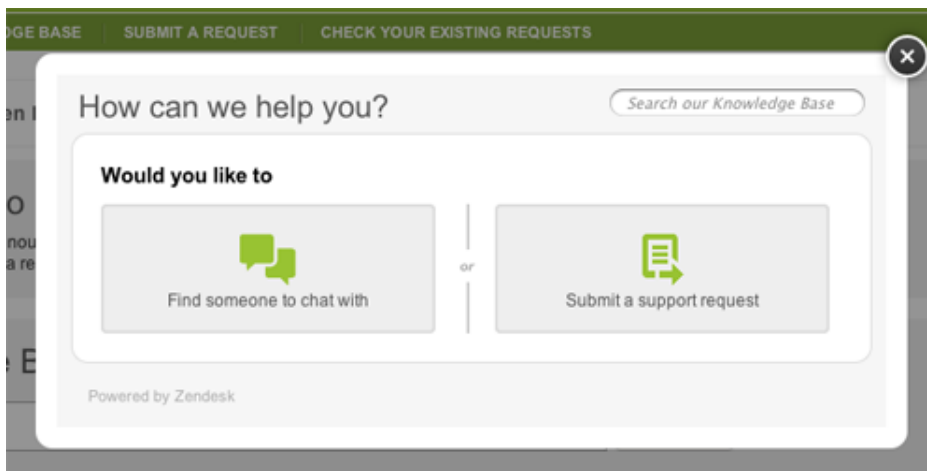
Voice Settings +1 (415) 418-7524

Nickname	<input type="text" value="Premium Support"/>
If you have multiple phone numbers, give each a nickname to easily identify which number a caller is calling.	
Transcribe voicemails?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Record a text transcription of voicemails left at this phone number. Note: Transcription supports only English language at this time. Transcriptions incur an additional charge per minute.	
Update phone number settings	

4. Update your settings as needed then click **Update phone number settings**.

Setting up your Feedback Tab channel

The Zendesk Feedback Tab is essentially a small and portable version of the Web portal that you can embed in any web site hosted by a basic web hosting provider. You can even embed it into your own Zendesk. It can be configured to allow your end-users to search your knowledge base, submit a support request, or live chat with your agents.



Note: Chat, although configured as a separate channel, is hosted within the Feedback Tab. Configuring Chat is described in [Setting up your Chat channel](#).

When your end-users choose to submit a support request, they see the submit request form just as they would in your Web portal.

The tab part of the Feedback Tab is what your end-users click to display what's shown above. It's a small tab that can be aligned to either the right or left side of the Web browser.



The tab (both words and color) can be customized and branded, as can the Feedback Tab form. You change the text strings in the user interface (see [Customizing the text in your Feedback Tabs](#) and apply CSS code to change colors and layout (see [Customizing the Feedback Tab with CSS](#) in the CSS Cookbook).

You can create as many Feedback Tabs as you need. For example, you might create a Feedback Tab for each region or country you support or if you support multiple brands and products you can create one for each. Feedback Tabs can be tagged so that when you receive new support requests, you'll know their origin and can create a workflow based on those tags. Feedback Tabs also can be set to specific languages and the language is also available as a property in incoming support requests, which you can use to route those tickets.

Each Feedback Tab that you configure generates a snippet of JavaScript code. If you want to add the Feedback tab to your Zendesk, you create a Global JavaScript widget and add this code to it (see [Adding a Feedback Tab to your Zendesk](#)). To embed the Feedback Tab into any other web site, you import the JavaScript into your site, as described in [Adding a Feedback tab to an external web site](#).

Creating a Feedback Tab

As noted above, you can create as many Feedback Tabs as you need and place them wherever you want to offer your customers quick access to support.

Channels / Feedback Tabs

General Settings
Advanced Customization

If you run a website, an online store, or even your own web app, it's important that you can deliver support that your customers need whenever and wherever they may be. Feedback Tab allows you to do this by placing a widget on your website, online store, or web app that allows for ticket submission and knowledge base search.

Tab title Support

A tab will display on the side of your customers' browser window. You can select what the tab says.

Language English

The language in which your Feedback Tab's default messages will be presented.

Tab position Left Right

The tab can be flush to the left or right of the screen.

To create a Feedback Tab

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Feedback Tab**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Feedback Tab > Edit**.
2. Follow the instructions below for configuring your Feedback Tab.
3. Click **Preview and grab code snippet**. You'll copy the code and add it to a JavaScript widget as described below in [Adding a Feedback Tab to your Zendesk](#).

All of the settings in the General Settings tab are described in the following table. The Advanced Customization settings, which allow you to change the text that is displayed in the Feedback Tab, are described in [Customizing the text in your Feedback Tabs](#).

Setting	Description
Tab title	You can select from the following tab titles: <ul style="list-style-type: none"> Support Feedback Help Service Questions Comments Ask Us

Setting	Description
	<p>These tab titles are graphics. If you'd like to use a word that is not included in this list, you can create a custom tab title graphic instead (see Using a custom graphic for the Feedback Tab).</p>
Language	<p>Choose one of the over 40 languages that Zendesk supports. Selecting a language means that the text strings in the Feedback Tab will be displayed in that language. Your language selection is also included as a property in the tickets that are submitted via the Feedback Tab. You can use the language setting in your business rules (see Using a requester's language in your business rules).</p> <p>If you support multiple languages, you'll need to create a Feedback Tab for each language. For more information, see Creating a Feedback Tab in a different language.</p>
Tab position	<p>The tab can be positioned on either the right or left side of the browser. You can also use CSS to control the positioning of your tab (see Controlling the tab offset below).</p>
Tab color	<p>This is the background color of the tab. You can use simple named colors such as 'blue' or Hex numbers for the background color. The tab title text is white; therefore you should use a darker background. For more control over the design of the tab, create a custom tab graphic (see Using a custom graphic for the Feedback Tab).</p>
Feedback Tab Tag	<p>You have the option of adding tags to the Feedback Tab (separate tags with a space). You might do this as a way to route incoming tickets. For example, you could add a unique tag for each Feedback Tab you create and then use that tag to automatically assign tickets from specific Feedback Tabs to specific groups or agents. Or, you might use the tags to create views or reports that show you from which Feedback Tab the tickets originated.</p>
End-users can chat with agents?	<p>This setting displays the Chat option to your users. You must first enable the Chat channel.</p> <p>When enabled, the Chat option is displayed along with the option to submit a support request. Users click the Chat option to initiate a Chat session with an agent.</p>
Knowledge base search and topic suggestions	<p>If you've created a knowledge base, you may reduce the total number of support requests by helping your users to locate the answers to their questions. Here are the options you have for integrating your knowledge base into the Feedback Tab:</p> <ul style="list-style-type: none"> • Enable topic suggestions & knowledge base search <p>With this option selected, end-users first see the prompt to search your knowledge base; the options to request support or begin a chat are not shown. A list of knowledge base articles that contain the words the users entered are displayed. If none of the search results are useful to the user, they can click None</p>

Setting	Description
	<p>of these are helpful - get in touch, which shows them the options to request support or begin a chat (if enabled). When a user clicks a knowledge base article link, your Web portal knowledge base is opened in a new browser window.</p> <ul style="list-style-type: none"> • Enable knowledge base search <p>This option shows the user the support request and begin a chat (if enabled) options. The knowledge base search is added to the top right corner of the form.</p> <ul style="list-style-type: none"> • Enable ticket submission only <p>This option shows only the support request and begin a chat (if enabled) options, not the knowledge base search.</p>
Display custom fields to end-users?	If you use custom ticket fields and want to include them on the support request form in the Feedback Tab, select this option. Only those custom fields that are marked visible to end-users will be added to the form.

If you don't need to make any customizations to the Feedback Tab, you can generate the JavaScript code for this Feedback Tab by clicking **Preview and grab snippet**. On the next page you'll see a preview of your Feedback Tab, which will be located on either the right or left side of the browser, depending on the setting you selected.

Most importantly, the settings you selected generated a snippet of JavaScript code. You'll use that code to add the Feedback Tab to either your Zendesk or any other web site you'd like.

Select the text, copy it, and if you're adding the Feedback Tab to an external web site, save it for later use.

Editing your Feedback Tab

You can generate any number of Feedback Tabs by using the simple process described above. However, there currently is not a user interface option (menu) for editing the Feedback Tabs you've created. You can edit them by using the Feedback Tab ID (referred to in the code as the dropboxID) in a URL, as in the following example:

```
https://myaccount.zendesk.com/account/dropboxes/2830039812/edit
```

Using this URL displays the edit page for the Feedback Tab, which is the same page you used to originally select the Feedback Tab settings and generate the JavaScript code.

Make your changes and then click **Preview and grab the code snippet** to save your changes.

When you update your Feedback Tab settings, you do not need redeploy the JavaScript code snippet, unless you made changes to the tab title, its color, or its position. As you can see in the example JavaScript code above, these are the settings that are contained in the init function in the JavaScript code. However, you can also edit this manually without changing the Feedback Tab settings in Zendesk and regenerating the code. For example, if you simply wanted to move your Feedback Tab to the right side of the browser, just edit that property in the init function, as shown here:

```
Zenbox.init({
  dropboxID: "2830039812",
  url: "https://myaccount.zendesk.com",
  tabID: "support",
```

```
tabColor:    "black",
tabPosition: "Right",
```

You can also change the tab title and color manually. The tab title property values are: `support`, `feedback`, `help`, `service`, `questions`, `comments`, `ask_us`. These of course correspond to the standard tab titles that you can set when creating or editing a Feedback Tab. The color property supports simple color names and Hex color codes.

The tab position can be set to either `right` or `left`. If you want more control over the position of the tab, you'll need to do so using CSS code (see [Controlling the tab offset](#) below).

The init function can also be used to pre-populate the Feedback Tab with data. See [Pre-populating data in the Feedback Tab](#).

All of the other Feedback Tab settings are stored in your Zendesk account and referenced via the tab ID. This is why you don't need to redeploy or edit the code if you make changes to the settings that are not contained in the init function.

Using a hyperlink instead of a tab

If you'd like, your users can launch the Feedback Tab via a hyperlink rather than by using the tab. To do this, you create a URL that references the Feedback Tab ID, as shown here:

```
<a href="http://myaccount.zendesk.com/account/dropboxes/2830039812"
onClick="script: Zenbox.show(); return false;">Open Feedback Tab</a>
```

You also need to edit the init function in the Feedback Tab JavaScript code to prevent the tab from being displayed. Add the line of code as shown below in bold.

```
Zenbox.init({
  dropboxID:    "2830039812",
  url:         "https://myaccount.zendesk.com",
  tabID:       "support",
  tabColor:    "black",
  tabPosition: "Right",
  hide_tab:    "true",
```

This code hides the tab that opens the Feedback Tab form. When your users click the hyperlink, the Feedback Tab form is displayed.

Adding a Feedback Tab to your Zendesk

To add a Feedback Tab to your own Zendesk account, you need to create a Global JavaScript widget and add your Feedback code to it.

To add a Feedback Tab to your Zendesk

1. Create the Feedback Tab and select and copy the code (as described above in [Creating a Feedback Tab](#)).

Be sure to copy the entire code snippet.

2. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.

Zendesk Classic: Select the **Settings** menu, then select **Extensions**.

3. Select the **Widget** tab and then click **Add widget**.
4. Select the **Global JavaScript** widget.
5. Enter a title for the widget (for example: *Feedback Tab*).

6. Select the types of users who will see the Feedback Tab. For example, if you want everyone who visits your Zendesk to see it, select **Anyone, including people who have not logged in**.
7. Paste the Feedback Tab JavaScript code into **Content**.

To make this code work in your Zendesk, you need to make one minor change. Add a terminated script tag to the beginning of your code, as shown in this example in bold:

```
</script>
<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");
  ...
```

8. Click **Submit** to activate the widget. The Feedback Tab should now be displayed in the browser. If you don't see it immediately, refresh your browser.

For information about adding a Feedback Tab to an external web site, see [Adding a Feedback Tab to an external web site](#) below.

Customizing the text in your Feedback Tabs

Both the words displayed in and the color of the elements within the Feedback Tab can be customized. Changing the color and branding of the Feedback Tab is described in the CSS Cookbook in [Customizing the Feedback Tab with CSS](#).

Most of the words that are displayed in the Feedback Tab can be changed, as in this example:

The screenshot shows a feedback form titled "The MondoCam Help Center" with a search bar "Search our help center". The form contains the following fields and text:

- Subject*** with the prompt "Briefly describe your question or support issue".
- Description*** with the prompt "Enter the details of your question or support issue".
- Name*** and **Your email address*** input fields.
- A link for [Privacy Policy](#).
- Text "Powered by Zendesk" at the bottom left.
- A **Submit** button at the bottom right.

The title was changed as were the subject and description titles and the input prompts.

To change the text strings in your Feedback Tab

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Feedback Tab**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Feedback Tab > Edit**.
2. Select the **Advanced Customization** tab.

The screenshot shows the 'Channels / Feedback Tabs' settings page with the 'Advanced Customization' tab selected. The page contains the following sections:

- Version:** This feedback tab is version 2.4. This is the latest version.
- Custom Image:** A text input field for a custom image URL. Below it, a note states: 'The full URL to a custom image you want to use in place of our own tab. Note you must host this yourself. The image should be 45 pixels wide and 108 pixels tall.'
- Form Title:** A text input field containing 'The MondoCam Help Center'.
- Subject Title:** A text input field containing 'Subject'. Below it, a note states: 'The subject sets the tone for the enquiry your customer is sending you. We suggest against simply using "Subject."'

3. Enter the text that you want displayed in the Feedback Tab.
4. Click **Preview and grab the code snippet** to save your changes.

Note: Dynamic content placeholders are not currently supported in the Feedback Tab.

Also located on the **Advanced Customization** tab is the option to add CSS code to customize the look of your Feedback Tab. For more information, see [Customizing the Feedback Tab with CSS](#) in the CSS Cookbook.

Customizing the 'tab' part of the Feedback Tab

Users launch the Feedback Tab by clicking a small tab that is placed along the edge of their Web browser.



You can customize how this standard tab looks using CSS or you can replace it with your own custom graphic.

For a detailed explanation of how to customize the standard Feedback Tab using CSS, see [The New Feedback Tab: an intro to CSS widgets](#). The following instructions explain how to replace the standard tab with your own custom graphic.

Using a custom graphic in version 2.5 Feedback Tabs

Version 2.5 Feedback Tabs are any Feedback Tabs created after July 20th, 2012 (the day this version was released). To use your own custom graphic in version 2.5 Feedback Tabs, you use a Global CSS widget and a small amount of CSS code.

The first step is to create your custom graphic and upload it to a publicly accessible location on the internet. The graphic must be 130 pixels wide by 60 pixels high. You create a graphic in a horizontal orientation and when it's added to your Zendesk it's shown in the default vertical orientation.

To create a custom graphic Global CSS widget

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select the **Settings** menu, then select **Extensions**
2. Select the **Widget** tab and then click **Add widget**.
3. Select the **Global CSS** widget.
4. Enter a title for the widget (for example: *Feedback Tab graphic*).
5. Select the availability option (the types of users who see your Feedback Tab). This should match the option you used when adding your Feedback Tab to your Zendesk (see [Adding a Feedback Tab to your Zendesk](#) above).
6. Paste the following CSS code into **Content**. Be sure to change the image URL to the location of your own graphic.

```
#feedback_tab_text {
  display: none;
}
#zenbox_tab {
  background-image: url(http://YOURURL.com/yourfeedbackimage.png);
  background-color: transparent !important;
  background-position: left !important;
}
```

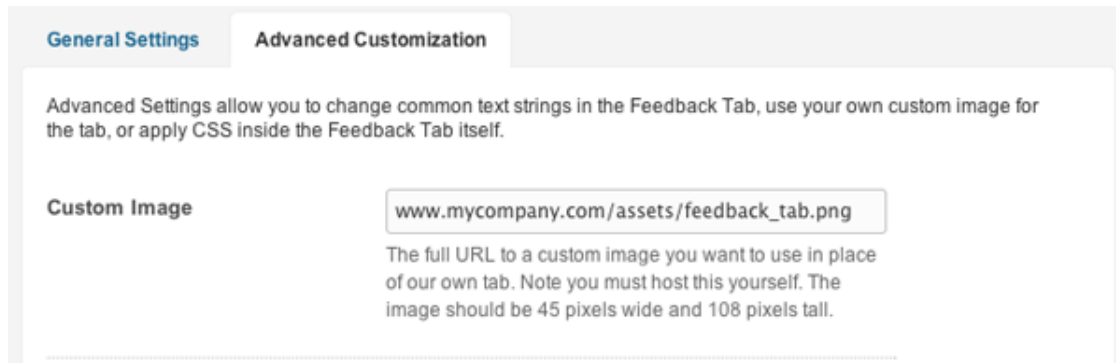
7. Click **Submit** to activate the widget. Your custom graphic should now be displayed. If you don't see it immediately, refresh your browser.

Using a custom graphic in legacy Feedback Tabs

Legacy Feedback Tabs are those created before version 2.5 was released (version 2.4 and older). These Feedback Tabs are still supported.

On the **Advanced Customization** tab of the **Feedback Tab** settings page, you can replace the standard tab with your own custom graphic. You can update the settings of a Feedback tab that you've already created by following the instructions in [Editing your Feedback Tab](#) above.

Create a graphic that is 45 pixels wide and 108 pixels tall in a vertical orientation. Upload the image to a location on the internet and then add the URL to the custom image option, as shown here:



The supported image formats are PNG, GIF, and JPG.

Click **Preview** and **grab the code snippet** to save this new setting.

Adding a Feedback Tab to an external web site

By adding a Feedback Tab to a web site, you're giving your end-users quick access to your Zendesk. You just need to include the Feedback Tab JavaScript code you generated by following the steps in [Creating a Feedback Tab](#) to your site.

Typically this is done by saving the code into a separate JavaScript file (for example, `feedback_tab.js`) and then referring to that file from somewhere within your site.

Once you've got the code loaded into your site, the tab will appear in your browser and when your users click it open they will see the Feedback Tab as they would if you had added it to your Zendesk.

Controlling the tab offset

By default, the tab is placed along the edge of the Web browser window and offset about 20% from the top. You can change this by overriding this default setting using CSS. For example, to place the tab 50% from the top of the Web browser window, use CSS code like this:

```
#zenbox_tab {
  top: 50%;
}
```

You add this CSS to the style sheet used by your external web site, not to the CSS code contained in the Advanced Customization settings page.

Embedding a Feedback Tab into a page in your web site

You can also embed the Feedback Tab form into a page in your web site. You just need to add an iframe that includes the URL to your Feedback Tab.

```
<iframe src="http://myaccount.zendesk.com/account/dropboxes/2830039812"
width="100%" height="100%"></iframe>
```

Size the iframe as needed to fit into your web site layout.

Note: How iframes behave in some web browsers can be unpredictable. Therefore, embedding a Feedback Tab using an iframe may not work properly. In other words, we cannot guarantee that this will work for you. You'll need to experiment with the web browsers you support.

Pre-populating data in the Feedback Tab

Some of the data in the Feedback Tab tab can be pre-populated so that your users don't have to enter it themselves. For example, if you know who the user is (because they are logged in to your site), you can grab their name and email address and enter into the form when the user clicks open the Feedback Tab.

You can pre-populate the data in the following fields:

- requester_name
- requester_email
- request_subject
- request_description

All of these are set in the init function in your Feedback Tab JavaScript code.

```
<script type="text/javascript">
  if (typeof(Zenbox) !== "undefined") {
    Zenbox.init({
      dropboxID:    "2830039812",
      url:          "https://myaccount.zendesk.com",
      tabID:        "support",
      tabColor:     "black",
      tabPosition: "Left",
      requester_name: "var_name",
      requester_email: "var_email",
      request_subject: "var_subject",
      request_description: "var_desc",
    });
  }
</script>
```

The values assigned to these fields would of course be the JavaScript variables you created to hold this data.


Setting up your Facebook channel

The Zendesk Facebook channel enables customers to make support requests using Facebook, and it enables your agents to see and respond to customer Wall posts (Timeline) and comments from within your Zendesk.


Starter plans can add one Facebook Page to your Facebook channel, and Plus and Enterprise plans can add two Pages. You have to be an administrator (or have appropriate role permissions) to set up the Facebook channel.

When you add a Facebook Page to your Facebook channel, your Zendesk monitors that Page. So users make Wall posts on that Page as they normally do.

Recent Posts By Others



Anton de Young
When will a Mondo camera include GPS?
[Like](#) · [Comment](#) · 2 hours ago




MondoCam Hi Anton,
You're in luck! The newly released MondoCam 2000+ includes GPS! We'll have more in stock early next week.

Thanks for your question!
about an hour ago · [Like](#)

Write a comment...


And each Wall post automatically becomes a support ticket in your Zendesk.



When will a Mondo camera include GPS?




Today 14:08 Anton de Young (Facebook page) Via [Facebook Page]

[comments \(2\)](#) [events](#)




Reply

Private Note

Recipients   

Reply as a public comment in Facebook


[Attach file](#)




Jennifer Rowe

Hi Anton,
You're in luck! The newly released MondoCam 2000+ includes GPS! We'll have more in stock early next week.


Thanks for your question!

TODAY 14:41 



Anton de Young

When will a Mondo camera include GPS?

TODAY 14:08 

When a user adds a Wall post on your Facebook page, that user becomes a new user in your Zendesk (if they are not already a user in your Zendesk) and the Wall post becomes a new ticket. You can set up a Facebook view in your Zendesk to see all your Facebook tickets in one place.

Any new comments to the Wall post are added to the ticket as additional comments. Agents can respond directly to a Wall post by adding a public comment to the support ticket. The comment will also appear on the associated Facebook Wall post.

In addition to automatically converting Wall posts to tickets, you can set up your Facebook channel so that private messages sent to the Facebook Page become tickets. This means that a user can ask a private question, and an agent can have a one-on-one conversation with the user. Users click the Message button on your Facebook Page to send a private message.



To set up your Facebook channel

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Facebook**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Facebook > Edit**.
2. Click the **You don't have any Facebook Pages configured yet** link.
3. Enter your Facebook credentials, if you are not already logged in.
4. Click **Go to App**.
5. In the permissions page, click **Allow**.
6. Click **Add** for the Facebook Page you'd like to link to your Zendesk.
7. If you have multiple Pages, click **Add** for another Facebook Page or close the window.

The Facebook Page(s) you added appears on your **Facebook Channel** page. You can edit the settings now, if you'd like. By default, any Wall post is converted to a ticket, including those by the Page owner.

To edit your Facebook channel settings for Wall posts and private messages

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Facebook**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Facebook > Edit**.
2. Click **Edit** beside the Facebook Page you'd like to edit settings for.
3. In the **Include Wall posts** section, select **No** if you don't want Wall posts automatically converted to tickets. Otherwise, leave it as is.
4. Deselect **Include Wall posts authored by the Page** if you don't want posts by the Facebook Page owner converted to tickets.
5. In the **Include private messages** section, select **Yes** if you want private messages converted to tickets.

6. Click **Update Page settings**.

Note: If you don't see the Message button on your Facebook Page, you need to enable it. In your Facebook Page, select **Manage > Edit Page**, then select **Show Message button** and click **Save Changes**.

To add another Page to your Facebook channel (Plus and Enterprise only)

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Facebook**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Facebook > Edit**.
2. Click **Add new Page**.
3. Enter your Facebook credentials, if you are not already logged in.
4. In the Add Facebook Pages dialog box, select **Import last week of Wall Posts**, if you want.
5. Click **Add** beside the Page you'd like to add.

The Facebook Page appears in **Facebook Channel** page.

Setting up your Twitter channel

Your Zendesk can monitor one or more Twitter accounts and convert tweets to tickets as needed. All tweet activity between agents and Twitter users is added as ticket comments. Using the Twitter channel, you can do the following:

- Create Twitter searches using keywords to monitor references to your business, products, and services
- Use your saved searches to convert tweets to tickets and retweet messages
- Convert a tweet into a ticket and respond to the user with a tweet, a direct message, or move the conversation to email
- Bulk convert multiple tweets into tickets in one step
- Convert tweets to tickets outside of Zendesk by favoriting a tweet in twitter.com and many other Twitter clients
- Automatically capture public mentions and direct messages as tickets
- Append ticket links to outgoing tweets
- Set one of your Twitter accounts as the primary so that all outgoing tweets come from one Twitter account

Only administrators have access to the incoming tweets; however, once they've been converted to tickets all agent types have access to them unless you've otherwise restricted their access to certain types of tickets (by restricting them to an organization, or by customizing Enterprise agent roles to exclude this permission, for example).

Tickets created from tweets are also referred to as *twickets* and you'll see that word used in our documentation as shorthand for 'tickets created via a tweet'. It's important to note however that once a tweet becomes a ticket it behaves just like any other ticket in your Zendesk. The one exception to this is that you have a number of Twitter specific options for replying back to the Twitter user. You can reply with a tweet or your reply can be a direct message, which is private message back to the user.

How tweets become tickets

You can control if and how incoming tweets become tickets. Here are several scenarios for managing incoming tweets and converting them to tickets.

- **Favorites.** Convert tweets outside of Zendesk by favoriting them in your Twitter client. This approach allows you to manually choose tweets to convert before they ever reach your Zendesk.
- **Saved searches.** Create Twitter searches in Zendesk and monitor your incoming tweets from within the Zendesk administrator interface. The advantage to this approach, aside from not having to manage them in another application, is that you can create as many saved searches as you need to monitor the Twitter traffic for your products and services. In other words, you sort through your Twitter stream and just grab the ones containing relevant keywords. You can then manually convert one or more tweets to tickets, retweet messages, and also view the Twitter user's profile.
- **Mentions.** Automatically create tickets from public tweets that contain your Twitter account's handle or direct messages from Twitter users that you follow. You may end up with tickets that are not actually support requests and that need no follow-up but you can manage these out of your ticket queue by manually solving and closing or deleting them.

- **Triggers.** Use one or more triggers to monitor new support requests that originate from your Twitter channel. You can use the trigger condition Ticket Channel, which has the following three Twitter sources: Twitter, Twitter DM (direct message), and Twitter Favorite. The advantage to this approach is that you have much more control over the creation and management of Twitter-based tickets. See [Managing twickets with business rules](#) below.

Which approach you take might be based on your overall Twitter traffic or the number of administrators who are available to monitor and convert tweets, or the number of agents you have available to deal with support requests. You may want to use a combination of all of these approaches.

Adding Twitter accounts to your Twitter channel

To start, you need to add at least one Twitter account to your Twitter channel. You can add as many Twitter accounts as you need. For example, your company may have different Twitter handles for different aspects of the company (sales, support, operations, and so on). One of your accounts can be set as the primary, which means that all tweet responses from your Zendesk use the primary account's Twitter handle.

To add a Twitter account

1. Click the **Manage** icon (⚙️), then select **Channels > Twitter**.
Zendesk Classic: Select **Settings > Channels > Twitter > Edit**.
2. Select the **Twitter accounts** tab.
3. Click **Add Twitter account**.
4. You'll be prompted to log in to Twitter and then authorize Zendesk to use your account. Enter your login information and then click **Authorize App**.

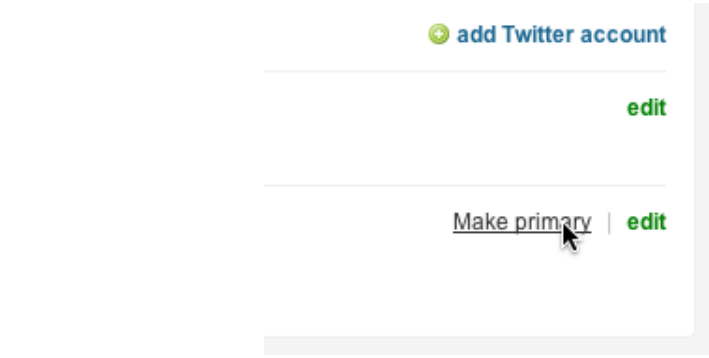

After your account has been authorized, your newly added Twitter account will be listed on the **Twitter accounts** tab. You'll want to edit the account's settings to control how tweets to this account are handled.

Editing Twitter account settings

After you've added a Twitter account, you should configure some basic settings for the account. These are described in the following table.

To edit a Twitter account, from the **Twitter accounts** tab, click the **Edit** link next to the account.

Setting	Description
Set as primary	<p>If a Twitter account is marked as primary, all tweets from Zendesk will come from the primary Twitter account.</p> <p>You can change the primary Twitter account any of the other Twitter accounts you've added. You can set the primary account by editing this setting on this page or you can switch the primary account on the Twitter accounts tab. Roll your mouse over the list of Twitter accounts and you'll see Remove as primary link, if the account is currently the primary, or the Make primary link if the account is not already the primary.</p>

Setting	Description
	
Capture public mentions as tickets	This automatically converts any public tweet containing your Twitter account handle (for example, @mondocam) to a ticket.
Capture incoming direct messages as tickets	This automatically converts incoming direct messages into tickets. This allows your customers to contact you privately rather than publicly. You can only receive a direct message from a Twitter user that you follow.
Track favorites	This automatically converts a tweet that you mark as a favorite to a ticket. For example, if you're managing your Twitter stream using twitter.com, you have the option of manually marking a tweet as a favorite.
	
	Learn more about favoriting tweets in Twitter help .

Edit the Twitter account settings as needed, then click **Update Twitter account**.

Deleting a Twitter account

From the **Edit** page you can also delete the Twitter account from your Zendesk. Deleting an account does not remove any of the tickets that were created via the Twitter account.

Automatically converting tweets to tickets

As shown in the table above, you can choose to automatically convert public mentions and direct messages into tickets (**Capture public mentions as tickets** and **Capture incoming direct messages as tickets**). If you enable these, the option to manually convert tweets to tickets will no longer be available for that Twitter account.

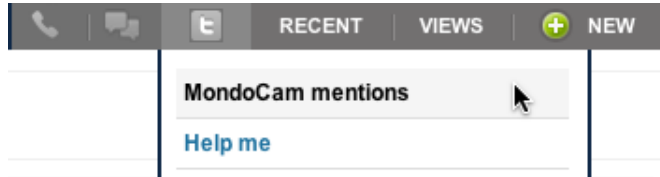
Viewing your twickets

As described in [Creating and managing saved searches](#) below, you can create keyword searches to monitor your Twitter stream from within Zendesk. Your saved searches are available on the **Manage**

searches tab in the Twitter channel settings page. When you convert a tweet to a ticket, it is added to your ticket queue and you can create a view just for your twickets if you'd like. See [Managing twickets with business rules](#) below.

Adding Twitter search to the top menu bar (Zendesk Classic only)

In the Classic version of Zendesk, you can add your saved Twitter searches (defined in [Creating and managing saved searches](#)) to a quickly accessible menu in the top menu bar.

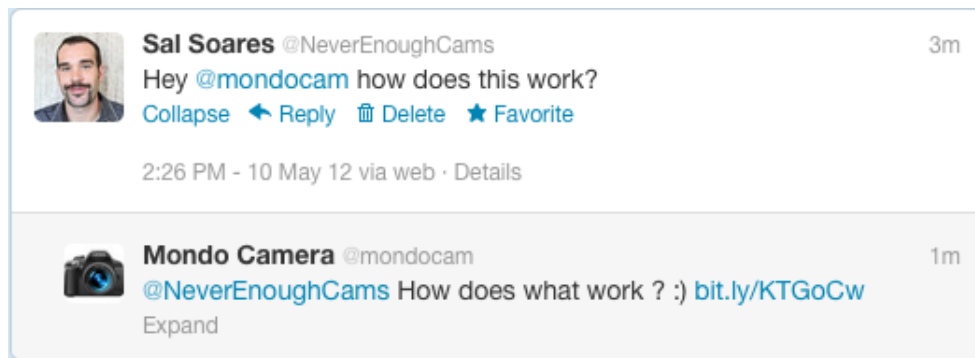


To enable Twitter search in the menu bar in Zendesk Classic

1. Select **Settings > Channels > Twitter > Edit**.
2. Select the **General settings** tab.
3. Enable the menu by clicking **Yes** next to the **Enable twitter search?** option.

Appending ticket links to outgoing tweets

Another option for your outgoing Tweets is to append a shortened URL to the ticket you created from the tweet. This allows the Twitter user to access the ticket page in the Web portal via their Twitter account. In other words, remote authentication is used to log in through Twitter to Zendesk (end-users must sign in to Zendesk to see the ticket page).



Once a Twitter user has access to the ticket page, they can add a longer comment than they could have in Twitter given the 140 character limit of a tweet. They can also update their user profile (adding their email address for example).

You have the option of allowing the agent to decide if a shortened or the original URL is used in the response. And, you can choose one of several URL shortening services to use.

To append ticket links to outgoing tweets

1. Click the **Manage** icon (⚙️), then select **Channels > Twitter**.
Zendesk Classic: Select **Settings > Channels > Twitter > Edit**.
2. Select the **General settings** tab.

3. Enable the ticket links by clicking **Yes** next to the **Append ticket links to outgoing tweets?** option.
4. If you want agents to decide when to use shortened URLs, deselect the **Always include shortened ticket URL** option. It is selected by default.
5. If you want to change the URL shortening service, choose from the options listed or select **Custom** and then enter the URL of the shortening service you want to use.
6. Click **Save tab**.

Creating and managing saved searches

As discussed in [How tweets become tickets](#), there are several ways to approach viewing and managing incoming tweets. You can manage them manually both within and outside your Zendesk account or you can automate the process of turning tweets into tickets.

An effective way of managing incoming tweets is to create Twitter searches based on specific keywords. For example, you can create a Twitter search that captures any tweets that mention one of your products by name. You can create a Twitter search and set the criteria in Zendesk and then view the search results and manually determine which tweets should be converted to tickets.

If you're using multiple Twitter accounts in your Twitter channel, you can select which one to respond from in the search. This only works if you haven't set one of our your Twitter accounts as the primary account.

Searches can also be made available to all agents, just agents in a specific group, or only yourself.

For more information about using your saved Twitter searches, see [Using your Twitter saved searches to monitor and manage tweets](#).

To create a Twitter search

1. Click the **Manage** icon (⚙️), then select **Channels > Twitter**.
Zendesk Classic: Select **Settings > Channels > Twitter > Edit**.
2. Select the **Manage searches** tab.
3. To create a new search, click **Add search**.
4. Set the options described in the following table.

Setting	Description
Name your search	The title of your saved search.
Respond to tweets as	The default Twitter account for responding to tweets in this search. If you set one of your Twitter accounts as the primary, your response will come from that primary account. This search-based response setting will only be used if none of your Twitter accounts are set as the primary. If you're monitoring different Twitter streams, you may not want to set a primary and just respond from each Twitter account separately.
Keywords	Zendesk will search Twitter for tweets that match these keywords. Click Preview Twitter Search to test your keywords. You use the Twitter keyword search syntax to define a search. See Twitter search operators .
Search available for	Set the availability of the search. You can make it available to all agents, just agents in a specific group, or only yourself.

5. Click **Add search**.

To edit a saved search

1. Click the **Manage** icon (⚙️), then select **Channels > Twitter**.
Zendesk Classic: Select **Settings > Channels > Twitter > Edit**.
2. Select the **Manage searches** tab.
3. Next to the search you want to edit click **Edit**.
4. Make your changes and then click **Update search**.

To delete a saved search

1. Click the **Manage** icon (⚙️), then select **Channels > Twitter**.
Zendesk Classic: Select **Settings > Channels > Twitter > Edit**.
2. Select the **Manage searches** tab.
3. Next to the search you want to delete click **Edit**.
4. Click **Delete**. You'll be prompted to confirm that you want to delete the search. Click **OK**.

Filtering out retweets

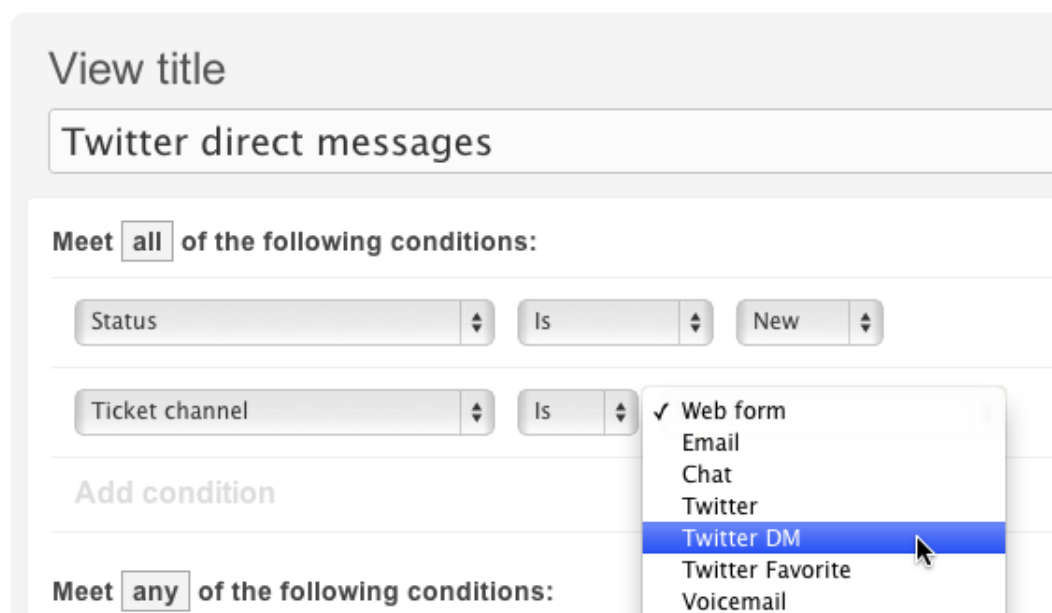
You may also want to filter out retweets from your Twitter search results. To do this, add "filter:retweets" to your search string. This excludes all retweets from your search results.

Managing twickets with business rules

A number of conditions are available to manage your twickets using business rules.

Like the other Zendesk channels, you can detect a ticket's source using the Ticket Channel condition in automations, reports, triggers, and views. There are three Twitter source types you can use in the Ticket Channel condition: Twitter, Twitter DM (direct message), and Twitter Favorite.

If, for example, you wanted to create separate views of each of the Twitter source types, you simply choose the Ticket Channel condition and then select the type.



In addition to the Twitter channel source types, you also have three other Twitter conditions that are available in triggers:

- Requester's Twitter followers are...
- Requester's number of tweets is...
- Requester is verified by Twitter

The first two conditions help you to determine how active and potentially influential a Twitter user is, which may influence how you manage their tweets. For example, you might want to set twickets from more highly visible Twitter users to Urgent so that you respond as quickly as possible. Here's an example of what a trigger like that might look like:

Trigger title

Capture Important Twitter Mentions

Meet **all** of the following conditions:

Requester's Twitter followers are.	Greater than	200	-
Ticket channel	Is	Twitter	-
Status	Less than	Solved	-
Add condition			+

Meet **any** of the following conditions:

-- Click to select condition. --	-
Add condition	

Perform these actions:

Priority	High	-
Assignee	(current user)	-
Add tags	important_twitter	-
Add action		+

Delete
Update trigger

The **Requester is verified by Twitter** condition is a special type of Twitter account that has had its identity verified by Twitter (by submitting proof of business, for example). Knowing that a Twitter account has been verified may be important to you in determining how to handle twickets. For more information, see [FAQs about Verified Accounts](#) in Twitter help.

And of course, you can also add tags to your twickets and use them to manage your twickets through your workflow.

Using your Twitter saved searches to monitor and manage tweets

Once you've created saved searches (see [Creating and managing saved searches](#)), you can routinely monitor them and decide if you need to convert any of them to tickets. You can also retweet a Twitter message, follow the Twitter user, select any number of tweets and convert them to a ticket, or view the Twitter user's Twitter profile.

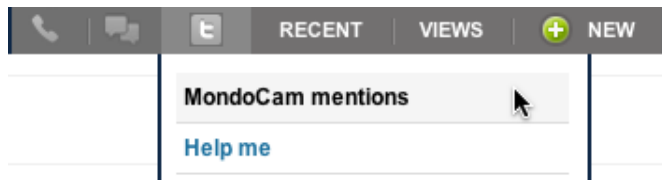
You can access your saved Twitter searches from the **Manage searches** tab of the Twitter channel settings page.

To access your saved Twitter searches

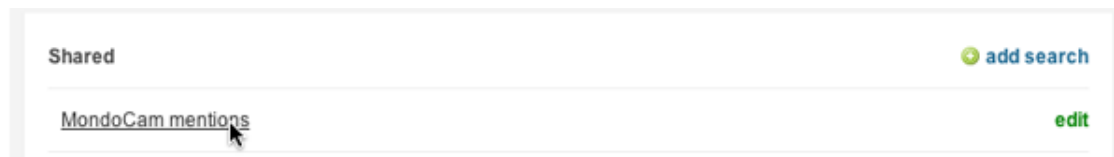
1. Click the **Manage** icon (⚙️), then select **Channels > Twitter**.
Zendesk Classic: Select **Settings > Channels > Twitter > Edit**.
2. Select the **Manage searches** tab.

Zendesk Classic:

Your saved searches can be added to the top menu bar in Zendesk Classic if you set the **Enable Twitter search** option on the **General settings** tab (see [Adding Twitter search to the top menu bar](#)).



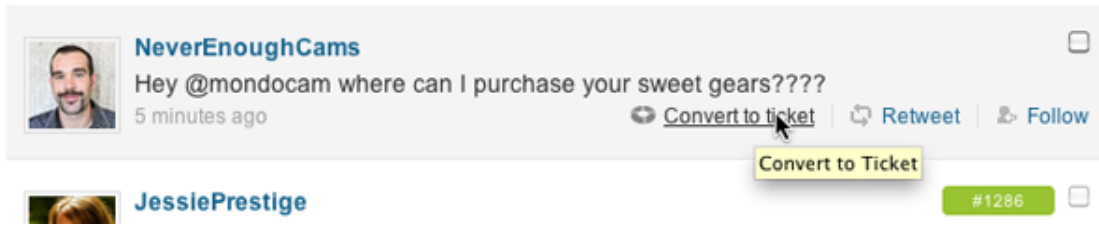
You can view the search results for each of your searches simply by clicking the name of the search.



This runs your search and returns results of all the tweets that meet the search criteria. You can then convert tweets to tickets, retweet a message, and view a Twitter user's profile.

Converting a tweet to a ticket

From your saved search results you can convert a tweet into a ticket. To do so, locate the tweet you want to convert and then click **Convert to ticket**. You have to convert the tweet to a ticket to respond to the tweet.



When you create a ticket from a tweet, you're presented with the same ticket properties as any other ticket.

 A screenshot of the 'Convert to Ticket' dialog box. At the top, it shows the tweet from 'NeverEnoughCams' with the text 'Hey @mondocam where can I purchase your sweet gears????' and a '10 minutes ago' timestamp. Below this, the dialog is titled 'Convert to Ticket' and includes a '▼ apply macro' link. The 'Subject' field contains the tweet text. Below the subject are dropdown menus for 'Status' (set to 'Solved'), 'Type' (set to 'Question'), 'Priority' (set to 'Normal'), 'Group', and 'Assignee*'. There is a 'Tags' field. A text area for the response contains the text: 'Thanks for contacting us! Check out www.mondocameras.com to buy one (or more ;) 5 of our cameras.' Below the text area is a checked checkbox for 'Requester and CCs can see this comment (public comment)'. A dropdown menu for 'Tweet to requester' is set to 'Tweet to requester'. At the bottom, it says 'Replying from: @mondocam' and has 'Cancel' and 'Create Ticket' buttons.

The difference is that you have the following options for responding to the user:

- Tweet to requester
- Do not tweet
- Send as direct message

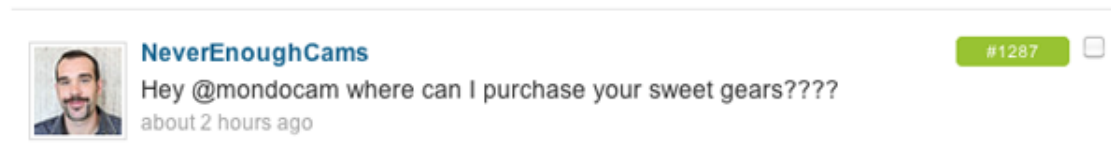
The **Do not tweet** option allows you to add a public comment to the ticket without also sending a tweet. You might use this option if you want to communicate with the requester via email rather than through tweets. You'd of course need to have the requester's email address added to their profile to

do this. The requester could do that themselves by logging into the Web portal via Twitter to view one of their tickets, you or another agent could add it, or perhaps the Twitter user already has an account in your Zendesk and you've merged that user account with the new account created when a tweet was converted to a ticket.

A direct message is a private message sent via Twitter to one of your followers. You can only send a direct message to a user who is following you and you can only receive direct messages from users that you follow. How do you know, within Zendesk, if a Twitter user is following you? If they are, the **Send as direct message** option is active and selectable.

As with any other ticket, if you want to add a private comment, just deselect the **Requester and CCs can see this comment** option.

Set the ticket properties as needed (you must assign an agent to the ticket) and then click **Create Ticket**. The number assigned to that ticket is listed in the search results so that you can see which of the tweets you've already converted to tickets.



You can click the ticket link to view the ticket.

Note: You can only have one open ticket at a time for each Twitter user. You have to either delete or solve and close the currently open ticket to create a new ticket from a different tweet from that same user.

When you create a ticket from a tweet and the user doesn't already exist in your Zendesk, a new user account is created. The Twitter user's name is added to the user profile and their Twitter handle is added as their primary identity (since that all the data you have about this user is from the tweet). If the user already exists in your Zendesk and their Twitter account is added to their user profile, the new ticket is matched to that existing user's account.

Bulk converting tweets to a ticket

You also have the option of converting more than one tweet to tickets in a single step. Why do this? You might want to create tickets and then tweet back a single response that will be sent to every Twitter user whose tweet you selected.

To bulk convert multiple tickets

1. Select more than one tweet from your search results.
2. Click **Bulk convert to ticket**.
3. Set the ticket properties as needed and add a comment.


Convert 2 tweets to tickets ▼ [apply macro](#)

Subject

Status **Type** **Priority** **Group**

Assignee*

Tags

 It typically takes 6-8 weeks after we receive your rebate request before it is mailed to you.

Requester and CCs can see this comment (public comment).

Replying from: @mondocam



NeverEnoughCams

Hey @mondocam it's seconds since my last tweet and still no rebate.
 about a minute ago



NeverEnoughCams

Hey @mondocam when is that mail-in rebate coming?
 2 minutes ago



4. Choose how you want to reply to the requester (Tweet to requester, Do not tweet, etc.).
5. Click **Create Ticket**.

A separate ticket for each message is created and the comment (if a tweet or a direct message) to sent to each of the selected tweets. So, in our example above, the Twitter requester will receive the same comment as a reply to both tweets.

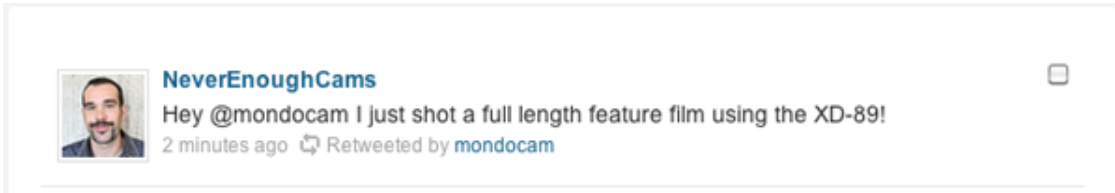
Retweeting a Twitter message

You also have the option of retweeting a Twitter message. You might do this if you want to share a customer's tweet about their positive experience using your product.

Locate a tweet that you want to retweet and then click **Retweet**.

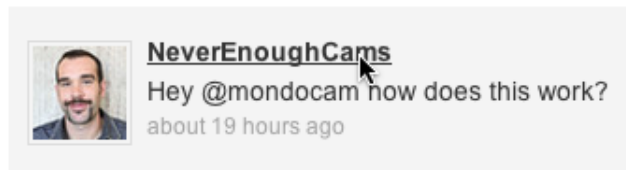


Once you've retweeted the message, it's indicated on the tweet in the list of search results.



View a Twitter user's Twitter profile

The user's Twitter handle links to their Twitter account profile. Simply click the user's handle link to see their Twitter profile.



Zendesk for Twitter advanced search operators

Agents and administrators can define custom Twitter saved searches in Zendesk. Tweets in the search results can be converted to a Zendesk ticket so you can continue to track the conversation with the customer.

Zendesk allows any of the Twitter saved searches that are supported at search.twitter.com. The table below provides search examples that you can use to create advanced searches.

Operators	Finds tweets
twitter search	containing both "twitter" and "search"; this is the default operator
"happy hour"	containing the exact phrase "happy hour"
love OR hate	containing either "love" or "hate" (or both)
beer -root	containing "beer" but not "root"
#haiku	containing the hashtag "haiku"
from: alexiskold	sent from person "alexiskold"
to: techcrunch	sent to person "techcrunch"
@mashable	referencing person "mashable"
"happy hour" near: "san francisco"	containing the exact phrase "happy hour" and sent near "san francisco"
near: NYC within: 15mi	sent within 15 miles of "NYC"
superhero since: 2010-12-27	containing "superhero" and sent since date "2010-12-27" (year-month-day)
ftw until: 2010-12-27	containing "ftw" and sent up to date "2010-12-27"
movie -scary :)	containing "movie", but not "scary", and with a positive attitude
flight :(containing "flight" and with a negative attitude
traffic ?	containing "traffic" and asking a question
hilarious filter: links	containing "hilarious" and linking to URLs
news source: twitterfeed	containing "news" and entered via TwitterFeed

Setting up your Chat channel

The Chat channel allows your agents to interact with customers in real-time using text chat. A chat session becomes a ticket and all of the text within the chat is added as a comment to the ticket. Your customers can initiate a chat session from your Feedback Tab or, if you allow it, from the ticket details page in the Web portal.


The details of how agents use chat is described in [Providing live chat support with Zendesk Chat](#) in the Zendesk Agent Guide. This topic describes how administrators set up the Chat channel.

Chat is available to the Regular, Plus, and Enterprise plans.

Configuring Chat channel settings


Enabling Chat for your account means that agents with the proper permissions can be made available to respond to chat requests (see [Which agents can chat with end-users?](#) below).

To configure your Chat channel

- Click the **Manage** icon () in the sidebar, then select **Channels > Chat**.

Zendesk Classic: Select **Settings > Channels > Chat > Edit**.

The following table describes the Chat channel configuration settings.

Chat setting	Description
Enable Chat?	<p>Enabling Chat makes it possible for agents who have the proper access permission to make themselves available and accept chat requests.</p> <p>As described in Providing live chat support with Zendesk Chat in the Zendesk Agent Guide, this adds the Chat option to the Zendesk agent interface.</p> <p>You can think of this setting as enabling the back-end Chat support in your account. Since end-users are the ones who initiate chat sessions, you also need to either add Chat to a Feedback Tab (described below) or allow end-users to chat with agents from a ticket they are viewing in the Web portal, which is the next setting on this page.</p>
Chat about my ticket?	<p>This setting allows end-users to initiate a chat session from an existing ticket that they are viewing in the Web portal (any ticket in Check your existing requests). When enabled and if at least one agent has made themselves available to chat, the end-user sees this link in the ticket:</p> <p></p> <p>Clicking the link starts a new chat session and all text entered during the chat is added to a new comment in the ticket.</p>
Maximum chat requests per agent	<p>You can select 1 through 9 and unlimited. When an agent reaches the maximum chat requests limit, the agent is automatically made unavailable for further chat requests until the number of open chats decreases.</p>

Chat setting	Description
Welcome message	This is message that is displayed to end-users when a chat is initiated. The default text is "Hi there. How can I help today?". Change this to any greeting that you'd like.

Configure your Chat channel as needed and then click **Save**.

Adding Chat to a Feedback Tab

Your Feedback Tabs can prompt users to search your knowledge base, submit a support request, or chat with an available agent in real-time. There's just one setting that you need to enable in a Feedback Tab to include Chat.

End-users can chat with agents?

Yes No

When this is enabled, a question will be captured before any other step. If agents with an admin role are available to chat, the user will be given the option to chat live or submit a ticket about their question. For other agents, you need to grant them chat access permission in [roles](#).

The Feedback Tab settings are described in [Setting up your Feedback Tab](#).

Which agents can chat with end-users?

When you enable Chat, your agents are able to chat with end-users. However, all agents, administrators, and the account owner must belong to a group to use Chat. Belonging to a group is a requirement to be assigned to tickets; Chat has the same requirement.

In the Enterprise version of Zendesk, you can also modify the predefined custom agent roles (Advisor, Staff, and Team Leader) to either allow or disallow those roles to answer chat requests.

Channels

Can answer chat requests

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

You can also create your own custom agent roles and define your staff's access to Chat based on your own needs and workflow. For more information, see [Custom agent roles](#).

Note: Enterprise version Light Agents cannot use Chat.

Enabling screencasting in your Zendesk (Plus and Enterprise)

A screencast is a short recording of your screen to show a task or an issue. You can enable screencasting in the following:

- Tickets
- Feedback Tab
- Forum topics

When screencasting is enabled, agents can add screencasts to new or existing tickets and forum topics. Agents can also add screencasts to comments for existing forum topics. End-users can add screencasts to their existing tickets viewed in the Web portal or any new tickets created through the Feedback Tab or Web portal.

A screencast can be up to 2 minutes long if forums screencasting is not enabled or up to 15 minutes long if you upgrade for forums screencasting. A screencast can include sound or you can mute sound.

Zendesk uses Screenr Business to record your screencasts, but all screencasts are created and managed through Zendesk.


Note: Screencasting for tickets and the Feedback Tab is available for Plus and Enterprise accounts. Screencasting for forum topics is available for Plus and Enterprise accounts when you upgrade your Screenr Business account for a monthly fee. Upgrading your Screenr account also enables you to record screencasts that are longer than two minutes.

Enabling screencasting in tickets and the Feedback Tab

You can enable agents to add screencasts to new and existing tickets and end-users to add screencasts to their existing tickets or any new tickets created through the Feedback Tab or Web portal.

Note: You must have the latest version of the Feedback Tab to enable screencasting in the Feedback Tab.

To enable screencasting in tickets

1. Click the **Manage** icon () in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Settings** menu, then select **Tickets**.
2. In the Screencast section, click **Enable screencasts for tickets**.

Screencasts

Enable screencasts for tickets

Allow agents and end-users to record a screencast linked to a ticket.

3. Click **Connect Screenr to your Zendesk account**.

Your help desk can use Screenr to capture screencasts.

After you confirm, we'll setup a free Screenr account without sharing your contact information with Screenr.

After your Screenr account has been created, you can enable screencasting in the Feedback Tabs and in forum topics.

[Connect Screenr to your Zendesk account](#)

4. Click **Save Tab**.

To enable screencasting in the Feedback Tab

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Feedback Tab**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Feedback Tab > Edit**.
2. In the Screencast section, click **Enable screencasts**.

Screencasts

Enable screencasts

Allow end-users to record a screencast and link it to tickets created from the Feedback Tab.

3. Click **Preview and grab code snippet** and copy the JavaScript code snippet.
4. Paste the code snippet in the JavaScript widget for an existing Feedback Tab (make sure you have the latest version of the Feedback Tab) or create a new Feedback Tab.

For more information, see [Adding a Feedback Tab to your Zendesk](#).

Enabling screencasting in forum topics

You can enable agents to add screencasts to new or existing forum topics. Agents can also add screencasts to comments in existing forum topics.

Screencasting in forum topics is only available when you upgrade your Screenr account for a monthly fee. Upgrading your account activates screencasting in forums for all your agents.


Note: If you have an Enterprise account and have upgraded your Screenr account for screencasting in the forums, contact Zendesk Support to request forums screencasting in your branded Zendesk accounts (spokes). There is no additional charge for spoke accounts, but currently, this must be enabled manually by Zendesk Support.

You can downgrade your Screenr account at anytime. When you downgrade your account, you will not be able to create new screencasts in the forums, but you will still be able to access any existing screencasts in the forums.

To enable screencasting in forum topics

1. Make sure that you've enabled screencasting for tickets (see the procedure above).

Enabling screencasting for tickets also adds a screencast button in the toolbar in forum topics. The button is not active unless you upgrade your Screenr account with a monthly fee, as described in this procedure.

2. Create a new forum topic and click the **Record screencast** button () in the toolbar.
This starts the payment process. You only need to go through this process once to activate screencasting in the forums.
3. Read the pricing information, click the box to agree to the service terms, then click **Upgrade Screenr account**.

Screencasting in forums requires a premium Screenr account, which is \$49/month or \$499/year.

You can easily upgrade your Screenr account from Zendesk. To get started, agree to Screenr's Terms of Service.

I agree to [Screenr's Terms of Service](#).

[Upgrade Screenr Account](#)

4. When prompted, click the link to the payment screen.


✔ **Click the link below to provide your payment information to Screenr:**

<https://screenr.chargify.com/h/334428/subscriptions/new?reference=jrowe>

5. Enter all the required information, then click **Place my order**.

When you finish, all of your agents will be able to use the Record screencast button in forum topics or comments to create screencasts. They will not be prompted for payment information.

To downgrade your Screenr account and disable screencasting in forum topics

1. Click the **Manage** icon () in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Settings** menu, then select **Tickets**.
2. In the Screencast section, click the **Change your upgraded Screenr subscription** link.

Screencasts

Enable screencasts for tickets
Allow agents and end-users to record a screencast linked to a ticket.

[Change your upgraded Screenr subscription](#)

3. In the confirmation screen, click **Downgrade**.
4. When the downgrade process is complete, click **OK**.
5. Click **Save Tab** to close the **Tickets** settings page.

Chapter

6

Business rules

- *Streamlining workflow with ticket updates and triggers*
- *Streamlining workflow with time-based events and automations*
- *Using placeholders*
- *Zendesk placeholders reference*
- *Using tags*
- *Using Liquid markup to customize comments and email notifications*
- *Filtering business rules (Plus and Enterprise)*
- *Notifying external targets*
- *Updated "Ticket Received At" condition*
- *Setting your business hours (Plus and Enterprise)*
- *Testing changes in your sandbox (Plus and Enterprise)*
- *Analyzing your business rules (Enterprise)*
- *Viewing the Audit log for changes (Enterprise)*

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 administrators 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:

The screenshot shows a configuration for a trigger with the condition type set to 'all'. It consists of two rows of conditions:

- Row 1: 'Ticket is...' (dropdown) followed by 'Created' (dropdown).
- Row 2: 'Status' (dropdown) followed by 'Is not' (dropdown) followed by 'Solved' (dropdown).

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:

The screenshot shows a configuration for a trigger with the condition type set to 'any'. It consists of two rows of conditions:

- Row 1: 'Ticket received at...' (dropdown) followed by 'sales' (text input) followed by '@mondocam.zendesk.com' (text input).
- Row 2: 'Ticket received at...' (dropdown) followed by 'support' (text input) followed by '@mondocam.zendesk.com' (text input).

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 ticket workflow. To view these triggers select the **Triggers** page. 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](#)).

Community tip! Alexander Aghassipour shows how to build a trigger that [auto-assigns a ticket to the first responding agent](#).

To add a trigger

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.

Zendesk Classic: Select the **Manage** menu, then select **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](#).

Community tip! [Justin Graves](#) of Ensign Facility Services shares a tip for [organizing your triggers](#) in our Community forums!

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 10: Trigger Conditions

Condition	Description
Status	<p>The ticket status values are:</p> <p>New is the initial status of a newly created ticket (not assigned to an agent).</p> <p>Open means that the ticket has been assigned to an agent.</p> <p>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.</p> <p>On-hold means that the support request is awaiting a resolution from a third party—someone who is not a member of your support staff and</p>

Condition	Description
	<p>does not have an agent account in your Zendesk. This status is optional and must be added to your Zendesk (see Adding the On-hold ticket status to your Zendesk).</p> <p>Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed.</p> <p>Closed means that the ticket has been locked and cannot be reopened or updated.</p> <p>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:</p> <p>Status is less than Solved</p>
Type	<p>The ticket type values are:</p> <p>Question</p> <p>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.</p> <p>Problem is a support issue that needs to be resolved.</p> <p>Task is used by the support agents to track various tasks.</p>
Priority	<p>There are four values for priority: Low, Normal, High, and Urgent.</p> <p>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:</p> <p>Priority is less than Urgent</p>
Group	<p>The group values are:</p> <p>(—) indicates that no group is assigned to the ticket.</p> <p>(assigned group) is the group that is assigned to the ticket.</p> <p>Group name is the actual name of the group that is assigned to the ticket.</p>
Assignee	<p>The assignee values are:</p> <p>(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.</p>

Condition	Description
Requester	<p>(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.</p> <p>(assignee) is the person who is assigned to the ticket.</p> <p>Agent name is the actual name of the person assigned to the ticket.</p> <p>The requester values are:</p> <p>(current user) is the last person to have updated the ticket.</p> <p>(requester) is the ticket requester.</p> <p>(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.</p> <p>Agent name is the actual name of the agent.</p>
Organization	<p>The organization values are:</p> <p>(—) is used to indicate that no organization has been added to the ticket.</p> <p>Organization name is the name of an organization.</p>
Tags	<p>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.</p>
Ticket channel	<p>The ticket channel is where and how the ticket was created and can be any of the following:</p> <ul style="list-style-type: none"> • 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

Condition	Description
	<ul style="list-style-type: none"> • 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	<p>You can select any of the following for the type of user that last updated the ticket:</p> <p>(agent) is a support staff member.</p> <p>(end user) is anyone who is a registered 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).</p> <p>Agent name is the actual name of an agent.</p>
Ticket Satisfaction	<p>Ticket satisfaction rating is available to Regular, Plus, and Enterprise plans. This condition returns the following customer satisfaction rating values:</p> <ul style="list-style-type: none"> • 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	This condition checks the email address from which the ticket was received. The ticket can be received from a Zendesk email domain such as sales@mondocam.zendesk.com, or from an external email domain such as support@acmejetengines.com.
Comment is	<p>This condition returns the type of comment contained in ticket updates.</p> <p>Public is a comment that everyone can see.</p> <p>Private is a comment that only members of the support staff can see.</p> <p>Present (public or private) is used to indicate if the update contains a new comment.</p> <p>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).</p>
Comment text	<p>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:</p> <ul style="list-style-type: none"> • Contains at least one of the following words • Contains none of the following words • Contains the following string

Condition	Description
	<ul style="list-style-type: none"> 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.
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 administrator has enabled 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.
<i>Custom fields</i>	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 11: Trigger actions

Actions	Description
Status	<p>The ticket status can be set to the following:</p> <p>New is the initial status of a newly created ticket (not assigned to an agent).</p> <p>Open means that the ticket has been assigned to an agent.</p> <p>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.</p> <p>On-hold means that the support request is awaiting a resolution from a third party—someone who is not a member of your support staff and does not have an agent account in your Zendesk.</p> <p>Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed. When tickets are closed is based</p>


Actions	Description
	<p>on business rules you define for this step in the workflow, using automations.</p> <p>Closed means that the ticket has been locked and cannot be reopened or updated.</p>
Priority	The priority can be set to Low , Normal , High or Urgent
Type	<p>The type can be set to the following:</p> <p>Question</p> <p>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.</p> <p>Problem is a support issue that needs to be resolved.</p> <p>Task is used by the support agents to track various tasks.</p>
Group	<p>You can set groups to any of the following:</p> <p>(—) is used to unassign a group (if one has already been assigned)</p> <p>(current user's groups) is all the groups to which the agent who is updating the ticket belongs.</p> <p>Group name is the actual name of the group that is assigned to the ticket.</p>
Assignee	<p>You can set the assignee to any of the following:</p> <p>(—) is used to set assignee to no one (unassigned)</p> <p>(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.</p> <p>(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.</p> <p>(assignee) is the person who is assigned to the ticket.</p> <p>Assignee name is the actual name of the person assigned to the ticket.</p>
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.

Actions	Description
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	<p>You can set the email user to any of the following:</p> <p>(current user) is the last person who updated the ticket.</p> <p>(requester) is the ticket requester.</p> <p>(assignee) is the agent assigned to the ticket.</p> <p>(all non-restricted agents) includes all agents that have unrestricted access to the ticket.</p> <p>Email user name is the actual registered name of the person who will receive the email.</p> <p>Adding the email user action also inserts the email subject and body.</p>
Email group	<p>You can set email group to any of the following:</p> <p>(—) is used to set the email group to none.</p> <p>(assigned group) is a reference to the assign group.</p> <p>Email group name is the actual name of a group.</p>
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 the current user to copy on the ticket update. This action is available when you enable CCs on tickets.
Share ticket with	Select a Zendesk to share the ticket with. See Sharing tickets with other Zendesk accounts .
Set requester's language to	Set the requester's language to one of your supported languages.
<i>Custom fields</i>	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. Click the **Manage** icon () in the sidebar, then select **Triggers**.

Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **Triggers and mail notifications**.
2. Locate the trigger you want to delete and select **Edit**.
3. Click **Delete**.

To deactivate/activate a trigger

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **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**.

Note: If you accidentally delete your default triggers (*Zendesk triggers to get you started*), you can quickly rebuild them. For more information, see [Resetting default triggers](#).

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 administrators 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:

Meet **all** of the following conditions:

The screenshot shows the configuration for an automation condition. It consists of two rows of dropdown menus. The first row has three dropdowns: 'Status', 'Is', and 'Solved'. The second row has three dropdowns: 'Hours since solved', 'Greater than', and '96'.

This automation closes tickets 96 hours after they have been solved (96 hours is a support 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:

Perform these actions:

The screenshot shows the configuration for an automation action. It consists of two dropdown menus: 'Status' and 'Closed'.

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, 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 automation 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

Administrators 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. Click the **Manage** icon () in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **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 on-hold
- 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)
- Hours until 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 12: Automation conditions

Conditions	Description
Status	<p>The ticket status values are:</p> <p>New is the initial status of a newly created ticket (not assigned to an agent).</p> <p>Open means that the ticket has been assigned to an agent.</p> <p>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.</p> <p>On-hold means that the support request is awaiting a resolution from a third party—someone who is not a member of your support staff and does not have an agent account in your Zendesk. This status is optional and must be added to your Zendesk (see Adding the On-hold ticket status to your Zendesk).</p> <p>Solved indicates that the customer's issue has been resolved. Tickets remain solved until they are closed.</p> <p>Closed means that the ticket has been locked and cannot be reopened or updated.</p> <p>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:</p> <p>Status is less than Solved</p>
Type	<p>The ticket type values are:</p> <p>Question</p> <p>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.</p> <p>Problem is a support issue that needs to be resolved.</p> <p>Task is used by the support agents to track various tasks.</p>
Priority	<p>There are four values for priority: Low, Normal, High, and Urgent.</p> <p>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:</p> <p>Priority is less than Urgent</p>

Conditions	Description
Group	<p>The group values are:</p> <p>(—) indicates that no group is assigned to the ticket.</p> <p>(assigned group) is the group that is assigned to the ticket.</p> <p>Group name is the actual name of the group that is assigned to the ticket.</p>
Assignee	<p>The assignee values are:</p> <p>(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.</p> <p>(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.</p> <p>(assignee) is the person who is assigned to the ticket.</p> <p>Agent name is the actual name of the person assigned to the ticket.</p>
Requester	<p>The requester values are:</p> <p>(current user) is the last person to have updated the ticket.</p> <p>(requester) is the ticket requester.</p> <p>(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.</p> <p>Agent name is the actual name of the agent.</p>
Organization	<p>The organization values are:</p> <p>(—) is used to indicate that no organization has been added to the ticket.</p> <p>Organization name is the name of an organization.</p>
Tags	<p>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.</p>
Description	<p>The description is the first comment in the ticket.</p>
Ticket source	<p>The ticket channel is where and how the ticket was created and can be any of the following:</p> <ul style="list-style-type: none"> • Web form

Conditions	Description
	<ul style="list-style-type: none"> • 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 is	Created or Updated.
Ticket received at	This condition checks the email address from which the ticket was received. The ticket can be received from a Zendesk email domain such as sales@mondocam.zendesk.com, or from an external email domain such as support@acmejetengines.com.
Ticket Satisfaction	<p>Ticket satisfaction rating is available to Regular, Plus, and Enterprise plans. This condition returns the following customer satisfaction rating values:</p> <ul style="list-style-type: none"> • 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
<i>Custom fields</i>	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 13: Automation actions

Status	<p>The ticket status can be set to the following:</p> <p>New is the initial status of a newly created ticket (not assigned to an agent).</p> <p>Open means that the ticket has been assigned to an agent.</p>
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	<p>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.</p> <p>On-hold means that the support request is awaiting a resolution from a third party—someone who is not a member of your support staff and does not have an agent account in your Zendesk.</p> <p>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.</p> <p>Closed means that the ticket has been locked and cannot be reopened or updated.</p>
Priority	The priority can be set to Low, Normal, High or Urgent
Type	<p>The type can be set to the following:</p> <p>Question</p> <p>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.</p> <p>Problem is a support issue that needs to be resolved.</p> <p>Task is used by the support agents to track various tasks.</p>
Group	<p>You can set groups to any of the following:</p> <p>(—) is used to unassign a group (if one has already been assigned)</p> <p>(current user’s groups) is all the groups to which the agent who is updating the ticket belongs.</p> <p>Group name is the actual name of the group that is assigned to the ticket.</p>
Assignee	<p>You can set the assignee to any of the following:</p> <p>(—) is used to set assignee to no one (unassigned)</p> <p>(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.</p> <p>(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.</p> <p>(assignee) is the person who is assigned to the ticket.</p> <p>Assignee name is the actual name of the person assigned to the ticket.</p>

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	<p>You can set the email user to any of the following:</p> <p>(current user) is the last person who updated the ticket.</p> <p>(requester) is the ticket requester.</p> <p>(assignee) is the agent assigned to the ticket.</p> <p>(all non-restricted agents) includes all agents that have unrestricted access to the ticket.</p> <p>Email user name is the actual registered name of the person who will receive the email.</p> <p>Adding the email user action also inserts the email subject and body.</p>
Email group	<p>You can set email group to any of the following:</p> <p>(—) is used to set the email group to none.</p> <p>(assigned group) is a reference to the assign group.</p> <p>Email group name is the actual name of a group.</p>
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..
Share ticket with	Select a Zendesk to share the ticket with. See Sharing tickets with other Zendesk accounts .
Set requester's language to	Set the requester's language to one of your supported languages.
<i>Custom fields</i>	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. Click the **Manage** icon (⚙️) in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **Automations**.

2. Locate the automation you want to delete and select **Edit**.
3. Click **Delete**.

To deactivate/activate an automation

1. Click the **Manage** icon () in the sidebar, then select **Automations**.
Zendesk Classic: Select the **Manage** menu, then select **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:

my custom field

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

When you create custom fields an ID is automatically generated. To find the ID for a custom field, follow these steps:

1. Click the **Manage** icon (⚙️) from the sidebar, then select **Ticket Fields**.
Zendesk Classic: Select the **Manage** menu, then select **Ticket Fields**.
2. Locate your custom field in the list and then click **Edit**.

The ID is displayed in the right column, as shown here:



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:



```
{{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.

Zendesk 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 14: User object data

Properties/placeholders	Description
<code>user.name</code>	The user's full name.
Important: Remember that you need to replace <code>user</code> with one of the user types shown above this table (for example, <code>ticket.requester</code>).	
<code>user.first_name</code>	The user's first name.
<code>user.last_name</code>	The user's last name.
<code>user.email</code>	The user's email address.
<code>user.language</code>	The user's language preference.
<code>user.phone</code>	The user's telephone number.
<code>user.external_id</code>	The user's external ID (if one exists). Optional for accounts that have enabled enterprise single sign-on using JWT or SAML.
<code>user.details</code>	The user's details.
<code>user.notes</code>	The user's notes.
<code>user.time_zone</code>	The user's time zone.

Properties/placeholders	Description
<code>user.role</code>	The user's role (end-user or agent). Administrator users return as agent.
<code>user.extended_role</code>	<p>When using Zendesk Enterprise agent roles, this returns the name of the agent's Enterprise role. These are the predefined roles:</p> <ul style="list-style-type: none"> • Advisor • Light Agent • Staff • Team Leader • Legacy Agent • Administrator <p>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'.</p> <p>For more information about custom agent roles, see Custom agent roles.</p>
<code>user.id</code>	The user's ID.
<code>user.locale</code>	The user's locale (for example: en-US).
<code>user.signature</code>	The agent's signature. Only agents have signatures.
<code>user.organization...</code>	See <i>Organization data</i> below.
<code>user.tags</code>	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 15: Organization data object

Properties/placeholders	Description
<code>user.organization.id</code>	The ID of the organization that the user is assigned to.
Important: Remember that you need to replace <code>user</code> with one of the user types shown below this table (for example, <code>ticket.requester</code>).	
<code>user.organization.name</code>	The name of the organization that the user is assigned to.
<code>user.organization.is_shared</code>	True or False. Indicates if the organization is a shared organization.
<code>user.organization.is_shared_comments</code>	True or False. Indicates if the organization allows users to add comments to other user's tickets.
<code>user.organization.details</code>	Details about the organization.

Properties/placeholders	Description
<code>user.organization.notes</code>	Notes about the organization.
<code>user.organization.tags</code>	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 16: Ticket object data

Properties/placeholders	Description
<code>ticket.title</code>	The ticket subject.
<code>ticket.description</code>	The ticket description (the first comment).
<code>ticket.url</code>	The full URL path to the ticket (excluding "http://").
<code>ticket.id</code>	The ticket ID.
<code>ticket.created_at</code>	Time the ticket was created (for example, May-18).
<code>ticket.updated_at</code>	Time the ticket was last updated (for example, May-18).
<code>ticket.external_id</code>	The external ticket ID (if one exists).
<code>ticket.via</code>	The source type of the ticket (Web form, Mail, Twitter, etc.).
<code>ticket.status</code>	The ticket status (New, Open, Pending, Solved, Closed).
<code>ticket.priority</code>	The ticket priority (Low, Normal, High, Urgent).
<code>ticket.ticket_type</code>	Ticket type (Question, Incident, Problem, Task).
<code>ticket.score</code>	The ticket score.
<code>ticket.group.name</code>	The group assigned to the ticket.
<code>ticket.organization.name</code>	See Organization data above.

Properties/placeholders	Description
ticket.due_date	The ticket due date (relevant for tickets of type Task). The format is: May-18.
ticket.account	The Zendesk account name.
ticket.cc_names	The names of the people cc'd on the message. If you want to return the email addresses of the people CC'd on the message, you can use this Liquid code:
	<pre>{% for cc in ticket.ccs %} {{cc.name}} ({{cc.email}}) {% endfor %}</pre>
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. See Setting your business hours .
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. There are two types of ticket objects. The first allows you to also return a collection of comment and attachment data. The second type is preformatted and these placeholders simply return comments in predefined formats.

< DRAFT >

The ticket comment placeholders that are listed in the following table return a collection of comment and attachment data.

You can access the following data using Liquid markup:

- comment.author.name
- comment.created_at
- comment.created_at_with_time
- comment.value
- comment.attachments
 - attachment.filename
 - attachment.url
- comment.screencasts

Table 17: Comment data object

Properties/placeholders	Description
ticket.comments	Used as a placeholder, <code>{{ticket.comments}}</code> displays all the comments in a ticket (both

Properties/placeholders	Description
	<p>public and private). Although private comments are always filtered out of the notifications that are sent to the requester.</p> <p>Ticket.comments also serves as a collection for comment and attachment details. You can access the following data using Liquid markup:</p> <ul style="list-style-type: none"> comment.author.name comment.created_at comment.created_at_with_time comment.value comment.attachments <ul style="list-style-type: none"> attachment.filename attachment.url <p>For an example of accessing this data in business rules, see Customizing the formatting and placement of text in comments and email notifications.</p> <p>Note: This same comment data collection is available when using the ticket.public_comments, ticket.latest_comment, and ticket.latest_public_comment placeholders.</p>
ticket.public_comments	All public comments, most recent first. Unformatted text.
ticket.latest_comment	The most recent comment (both public and private). Unformatted text. Does not include attachments. To return attachments, use ticket.latest_comment_formatted.
ticket.latest_public_comment	The most recent public comment. Unformatted text.

Table 18: Formatted comment data

Properties/placeholders	Description
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_formatted	All public comments, most recent first.
ticket.latest_comment_formatted	The most recent comment (both public and private) with attachments (if any).

Properties/placeholders	Description
ticket.latest_public_comment_formatted	The most recent public comment.

Satisfaction rating data

The following data properties are available for customer satisfaction rating (see [Using customer satisfaction rating](#)).

Table 19: 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.current_comment	The comment that the user added when rating the ticket.

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.



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 support 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 Zendesk. 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.

Note: There's no limit on the number of tags that can be added to a ticket; however, there is a limit on the total number of characters allowed in the **Tags** field. This field supports up to 1000 characters. After you reach this limit, you will no longer be able to add more tags. None of your existing tags will be automatically removed.

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 Zendesk. 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 your Zendesk.

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. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Settings** menu, then select **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.

To disable/enable manual ticket tagging

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Settings** menu, then select **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 support 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.

To view the top 100 tag cloud

- Click the **Manage** icon (⚙️) in the sidebar, then select **Tags**.
Zendesk Classic: Select the **Manage** menu, then select **Tags**.

Zendesk also displays your tags when entering them into tickets and forum articles, as shown here:

Tags

about
about_support
about_salesforce_email_reply
about_sales
about_other
about_billing
about_soliciting
about_misfired_email
about_job
about_feedback
about_misfire

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 **Submit** to create or update the ticket.

Zendesk Classic: Click **Add Ticket** (if creating a 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. Click the **Manage** icon (⚙️) in the sidebar, then select **Tags**.

Zendesk Classic: Select the **Manage** menu, then select **Tags**.
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

- Click the **Manage** icon (⚙️) in the sidebar, then select **Tags**.

Zendesk Classic: Select the **Manage** menu, then select **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. Click the **Manage** icon (⚙️) in the sidebar, then select **Views**.
Zendesk Classic: Select the **Manage** menu, then select **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 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:

Add 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			+

Drop-down 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.

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 in 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 [Using Liquid markup to support 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 companies and organizations 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 administrator (on the **Localization** tab of the **Account** page) 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 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.created_at_with_time}}
  {{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:

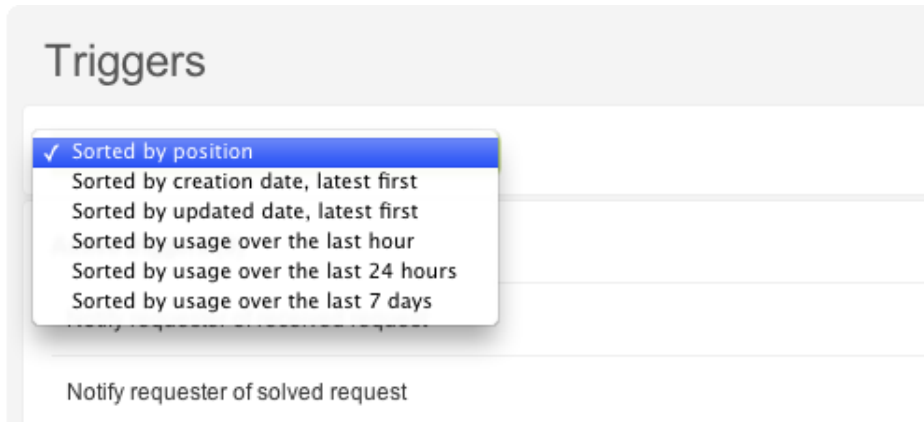
```
{% for comment in ticket.comments limit:1 offset:0 %}
```

You can do a lot with arrays in for loops. Refer to the Liquid documentation ([Liquid for Designers](#)) for more details.

Filtering business rules (Plus and Enterprise)

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.

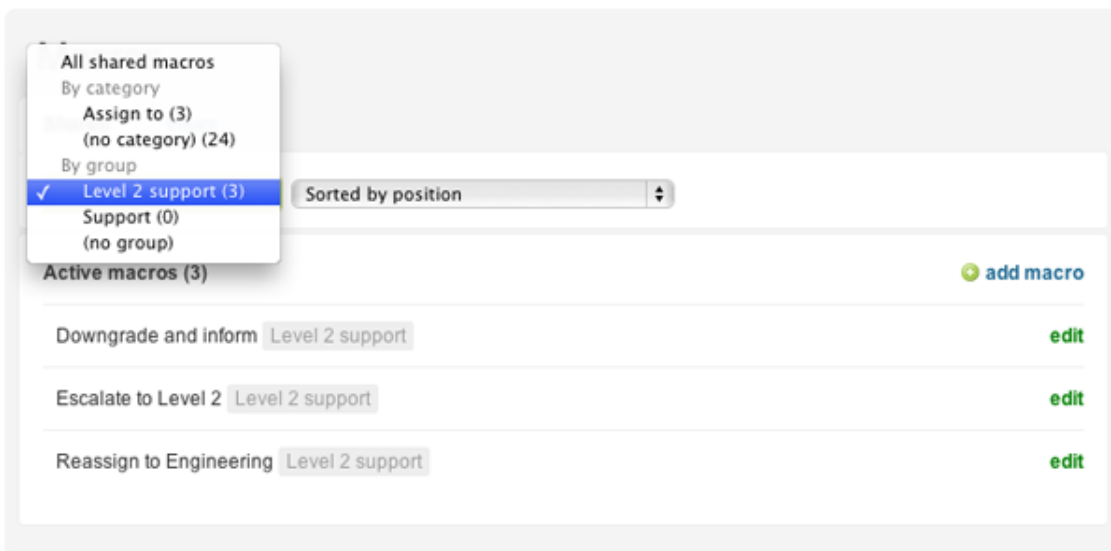
Automations, macros, and triggers can be sorted based on the following criteria:



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

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 well-known cloud-based applications and services.

Table 20: Targets

Target	Description
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: <ul style="list-style-type: none"> • New messages in a project • New comments in a specific message • New ToDo list • New ToDo item in a specific todo list <p>You need to enable API access in your Basecamp account to use this target. For information about setting up Basecamp, see Setting up and using Basecamp.</p>
Campfire	Send notifications to a Campfire chat room. See Adding Campfire to your Zendesk .
Clickatell	Use this target to send SMS messages using your Clickatell account. <p>Follow the steps in Clickatell HTTP API Guide to setup the account, add a HTTP connection and obtain an API ID.</p>
Email	Send emails to specific addresses. You can define the action in a trigger or automation.
Flowdock	Post updates as messages in a Flowdock flow.

Target	Description
Get Satisfaction	<p>Post public comments to Get Satisfaction topics for tickets created using the Zendesk moderator tool in Get Satisfaction.</p> <p>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).</p>
HTTP request	<p>Make a GET or POST request to any HTTP address. You can include URL parameters and use Zendesk placeholders as parameters. Example: <code>www.some-address.com?customer_name={{ticket.requester.name}}</code>. Set up a script on your server to receive the request, and then you can do just about anything from there.</p>
Microsoft Dynamics CRM	<p>Push ticket data to a Microsoft Dynamics CRM case.</p>
Pivotal Tracker	<p>Create stories in Pivotal Tracker from a Zendesk ticket to easily prioritize support issues in your project backlog.</p> <p>The Pivotal Tracker target sends the Zendesk ticket ID to Pivotal Tracker when creating a new story.</p> <p>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.</p>
Salesforce	<p>Create a Salesforce case from a Zendesk ticket.</p> <p>When you set up this target, Zendesk automatically creates an example trigger for you.</p>
SugarCRM	<p>Push ticket data to a SugarCRM case.</p>
Twilio	<p>Use this target to send SMS messages to a mobile phone using your Twilio account.</p>
Twitter	<p>Send notifications to a Twitter stream.</p> <p>Note: Make sure that you protect your twitter stream if you don't want notifications to be readable by the general public.</p>
Yammer	<p>Send notifications to a Yammer stream.</p> <p>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 Displaying ticket activity in your Yammer Activity Stream.</p>

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. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select the **Settings** menu, then select **Extensions**.
2. Click the **Targets** tab.
3. Select **Add target**.
4. All of the target options are listed. Select the type of target and enter the required target information (which varies from target to target).
5. 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. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select the **Settings** menu, then select **Extensions**.
2. Click the **Targets** tab.
3. Locate the target you want to edit and click **Edit**.
4. Make your changes and then click **Update Target**.

To delete a target

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select the **Settings** menu, then select **Extensions**.
2. Click the **Targets** tab.
3. Locate the target you want to edit and click **Edit**.
4. Select **Delete Target**.

To deactivate/reactivate a target

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select the **Settings** menu, then select **Extensions**.
2. Click the **Targets** tab.
3. Locate the target you want to deactivate and select **Deactivate**.
4. 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:

Trigger title

Notify Twitter when urgent ticket is submitted

Meet **all** of the following conditions:

Ticket is... Created

Priority is Urgent

Add condition

Meet **any** of the following conditions:

-- Click to select condition --

Add condition

Perform these actions:

Notify target My Twitter Account

Message:

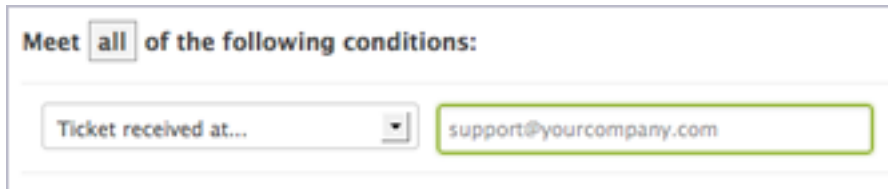
```
{{ticket.title}} received from {{ticket.requester}}
```

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 target (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.

Updated "Ticket Received At" condition

We made an update to the **Ticket Received At** condition in triggers. The condition now checks any email address instead of only a Zendesk email address.



The screenshot shows a configuration box for a trigger condition. At the top, it says "Meet **all** of the following conditions:". Below this, there is a dropdown menu labeled "Ticket received at..." and a text input field containing the email address "support@yourcompany.com". The text input field is highlighted with a green border.

This is useful if you use an external email address for customers to submit tickets. Example: support@acmejetengines.com. For more information, see [Using an external email domain](#).

With this change, you can create triggers that check for tickets received at any address, including an external email address.

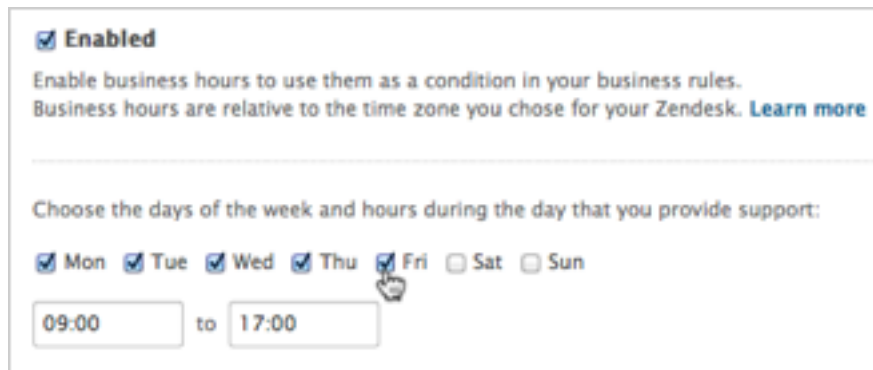
The **Ticket Received At** condition was changed only in triggers. In views and automations, the condition continues to check only for Zendesk email addresses.

Setting your business hours (Plus and Enterprise)

If you're on the Plus or Enterprise plan, you can define business hours for your Zendesk. If you don't provide 24/7 support to your customers, you can acknowledge your availability and give customers a better sense of when they can expect a personal response to their support requests. Even if you do provide 24/7 support, you can enhance your workflow by specifying business hours in your triggers and automations.

To define your business hours

1. Click the **Manage** icon (⚙️) in the sidebar, select **Settings > Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Select the **Localization** tab.
3. In the **Business Hours** section, make sure the **Enable** option is selected.
4. Select the days and hours when you will provide support.



Enabled
Enable business hours to use them as a condition in your business rules.
Business hours are relative to the time zone you chose for your Zendesk. [Learn more](#)

Choose the days of the week and hours during the day that you provide support:

Mon Tue Wed Thu Fri Sat Sun

09:00 to 17:00

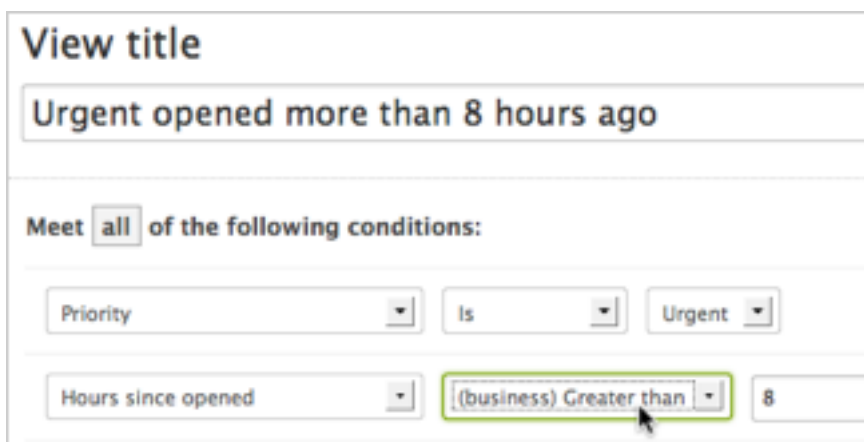
The values you set are relative to the time zone you select. See [Setting your Zendesk time zone and format](#).

5. Click **Save Tab**.

See [Tip of the Week: Using business hours in your triggers and notifications](#) for examples of how you can use business hours to help manage your workflow. Here are other possible use cases.

Business hours in views

You can create views to display urgent priority tickets open for more than one business day.



View title

Urgent opened more than 8 hours ago

Meet all of the following conditions:

Priority is Urgent

Hours since opened (business) Greater than 8

See [Using views to manage ticket workflow](#) in the Agent Guide.

Business hours in triggers

You can modify trigger conditions to send a different message to customers who submit requests outside of business hours.

Trigger title

Notify received request (outside of business hours)

Meet **all** of the following conditions:

Ticket is... Created

Within business hours? Yes No

Add condition

See [Streamlining workflow with ticket updates and triggers](#).

Business hours in automations

You can modify automations to remind agents that a ticket has remained open for more than one business day.

Automation title

Reminder for tickets open more than 8 hours

Meet **all** of the following conditions:

Group Is VIP

Hours since opened (calendar) Less than (calendar) Greater than (calendar) Is (business) Less than (business) Greater than (business) Is

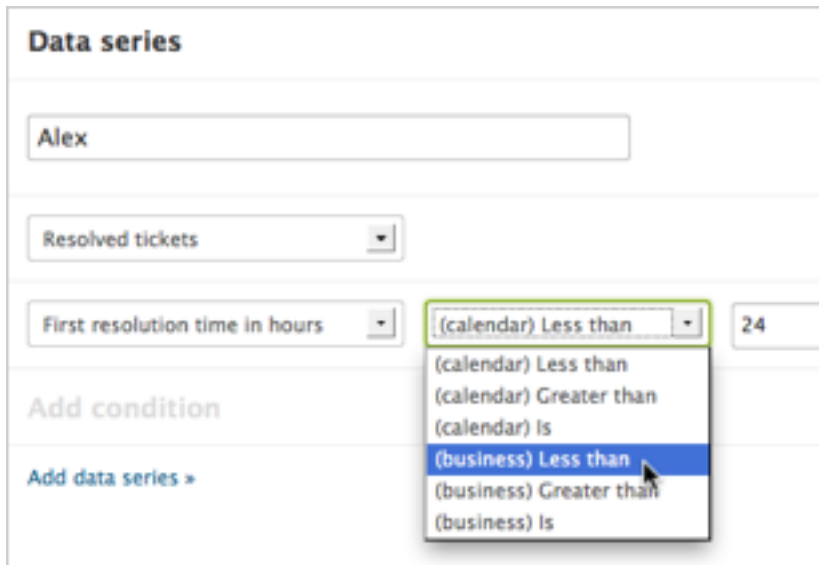
Add condition

Meet **any** of the following conditions:

See [Streamlining workflow with time-based events and automations](#).

Business hours in reports

You can build reports that give you metrics within business hours and outside of business hours.



The screenshot shows a configuration panel for a data series. The title is "Data series". Below the title, there is a text input field containing "Alex". Underneath is a dropdown menu with "Resolved tickets" selected. The next row contains a dropdown menu with "First resolution time in hours" selected, followed by a dropdown menu with "(calendar) Less than" selected, and a text input field with "24". A dropdown menu is open from the "(calendar) Less than" selection, showing the following options: "(calendar) Less than", "(calendar) Greater than", "(calendar) Is", "(business) Less than" (highlighted in blue), "(business) Greater than", and "(business) Is". Below the configuration fields, there are two buttons: "Add condition" and "Add data series >".

See [Monitoring ticket activity and agent performance with reports](#).

Testing changes in your sandbox (Plus and Enterprise)

The Plus or Enterprise plan provides two help desk instances: a customer-facing production instance and a development instance known as the sandbox. Use the sandbox to test, learn, and make mistakes before making your changes public. For example, you can use the sandbox to test and fine-tune a new trigger without affecting your customers.

After you're done testing and deploying your changes, you can reset the sandbox for a fresh round of development.

How the sandbox works

The sandbox borrows its initial settings from your production instance of Zendesk. This matching ensures your starting point is as close to the current production instance as possible.

The following settings are carried over from your Zendesk instance to the sandbox:

- Branding (colors, account name, and so on)
- Templates (standard email, welcome email, and so on)
- Settings (channels, agent permissions, and so on)
- Administrators (names, identities, roles, and so on)

The following settings are not copied to the sandbox:

- Agent and end-user profiles
- Triggers, views, automations, macros, and targets
- Custom ticket fields
- Tickets


This configuration helps to prevent mistakes such as emailing live data to customers during testing.

The changes you make in the sandbox cannot be copied automatically to the production instance. Once you're satisfied with the changes, you must reproduce them manually in the production instance.

Creating your first sandbox

Before using your sandbox for the first time, you must initialize it. The sandbox is created with settings from your current production instance of Zendesk. See [How the sandbox works](#).

To create a sandbox

1. Click the **Manage** icon () in the sidebar, then select **Manage > Sandbox**.
Zendesk Classic: Select the **Manage** menu, then select **Create sandbox**.
2. Click the **Create my Sandbox** button on the right side of the page. (You might have to scroll the page to the right to see it.)

The sandbox has a unique URL with a ten-digit number after your domain name. Example: *mycompanyname2234644375.zendesk.com*. You can use it to create a bookmark in your browser for quick access to the sandbox.

Working in your sandbox

Make sure you initialize the sandbox before using it for the first time. See [Create your first sandbox](#).

To switch to the sandbox from the production instance of Zendesk

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Manage > Sandbox**.
2. Click the **Go to Sandbox** button.

Zendesk Classic: Select the **Manage** menu, then select **Go to sandbox**.

You can also bookmark the sandbox and access it from your browser.

3. Log in to the sandbox with your normal administrator credentials.
4. Make changes, test, and fine tune.

Sandbox changes can't be copied automatically to the production instance. Once you're satisfied with the changes, you must reproduce them manually in the production instance.

Note: If you created your sandbox in Classic Zendesk and then switched to the new Zendesk, the sandbox won't be accessible from the new Zendesk. You can get back to Classic by selecting the **Go to web portal** link in your profile menu in the new Zendesk. See [How to preview and switch to the new version of Zendesk](#).

Resetting your sandbox

After you're done with a round of testing and updates, you can reset your sandbox for a fresh round of development and testing. Resetting is also useful if you mess up and want to start from scratch.

Resetting the sandbox deletes the existing sandbox and creates a new one based on the settings of your current production instance of Zendesk. See [How the sandbox works](#).

To reset the sandbox

1. Switch to the production instance of Zendesk.
2. Click the **Manage** icon (⚙️) in the sidebar, then select **Manage > Sandbox**.
3. Click the **Reset Sandbox** button.

Zendesk Classic: Select the **Manage** menu, then select **Reset sandbox**.

A new URL is assigned to the sandbox.

Analyzing your business rules (Enterprise)

In the Enterprise version of Zendesk, you can analyze how your business rules affect your support 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 your Zendesk 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 Zendesk.

Business rules analysis begins by summarizing how the following ticket properties are used in business rules:

- Group assignment
- Agent assignment
- Organization
- Channel
- Request received at email
- Email user
- Email group
- Notify target
- Tag

You access rules analysis from the business rules pages. For example, select the **Triggers** page and then select **Property analysis for triggers, automations, views and macros**.

Rule analysis

Group assignment (268) »

1. Level Support (119) (current groups) (37) Development (24) Inside Sales Americas (19) Operations (16)

2. Level Support (16) Sales (16) Account changes (12) Payment issue (11) Finance (9) Salesforce replies (9)

Product (8) Marketing (8) Inside Sales EMEA (8) Inside Sales APAC (3) Business Development (2)

Agent assignment (272) »

(current user) (169) (blank) (28) Elliot Robinson (6) Matt Van Loan (4) Paul Moseley (3) Ross Chapman (3)

Joni Barclay (3) Claire Gunter (3) Mike Warren (3) Erica Grijalva (3) Kate Hobbie (3) (requester) (2) Caitlin Henehan (2)

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.

The screenshot shows the 'Rule analysis' page for 'Group assignment 1. Level Support'. The page has a header with the title and navigation tabs: 'All rules', 'Triggers', 'Automations', 'Macros', and 'Views'. Below the tabs is a 'Show active' filter with a dropdown arrow. The main content is divided into two sections: 'Conditions' and 'Actions'. Under 'Conditions', there are two items: 'Notify assignee of comment update' and 'Notify group of assignment', both with a 'trigger' label and the condition 'Group is not 1. Level Support?'. Under 'Actions', there are two items: 'Notify requester of received request (support)' and 'Route billing mails to group and send receipt', both with a 'trigger' label and the action 'Group = 1. Level Support'.

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.

Viewing the Audit log for changes (Enterprise)

The Audit log shows various account, user, business rule, and app changes. It also includes ticket deletion.

Administrators for Enterprise plans can view the Audit log. The Audit log is not available for other plans.

Specifically, the Audit log shows the following changes:

- Account status
- Account billing cycle
- Account plan type
- Agent and administrator creation and deletion
- Agent role
- Agent and administrator password
- App installation, removal, settings modification, and activation
- App creation
- Automation creation, deletion, modification, and activation
- Global password policy
- Macro creation, deletion, modification, and activation
- Maximum number of agents for your account
- Ticket deletion
- Trigger creation, deletion, modification, and activation
- View creation, deletion, modification, and activation

To view the Audit log

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Account**.
Zendesk Classic: Select **Setting** > **Account**.
2. Click the **Audit Log** tab.
3. View the information in the Audit log.

Column	Description
Time	Time and date the event occurred
Actor	User who caused the event
IP	IP address of the user who caused the event
Type	Type of action for the event (Created, Updated, or Deleted)
Item changed	Object changed by the actor
Changes	Details about the event

4. Click any linked item to filter the Audit log based on that item.

For example, if you click a user in the Actor column, you see all events where that user is the Actor.

To see all events again, click **Show all results**.

Account

Subscription Branding Localization Address **Audit Log**

Filtered by: Actor [show all results](#)

Time -	Actor	IP	Type	Item changed	Changes
Oct 19 17:29	Fake Agent		Updated	Fake Agent (Administrator)	Role changed from Agent to Administrator

Chapter

7

Reporting and performance

- *Monitoring ticket activity and agent performance with reports*
- *Exporting ticket data to a CSV file (Plus and Enterprise)*
- *Using customer satisfaction ratings*
- *Using the reporting dashboard*
- *Monitoring performance with SLA service levels*
- *About the monthly account usage email*
- *Setting up Advanced Analytics (Plus and Enterprise)*
- *Using Advanced Analytics (Plus and Enterprise)*
- *Adding the Tickets View widget (Zendesk Classic)*

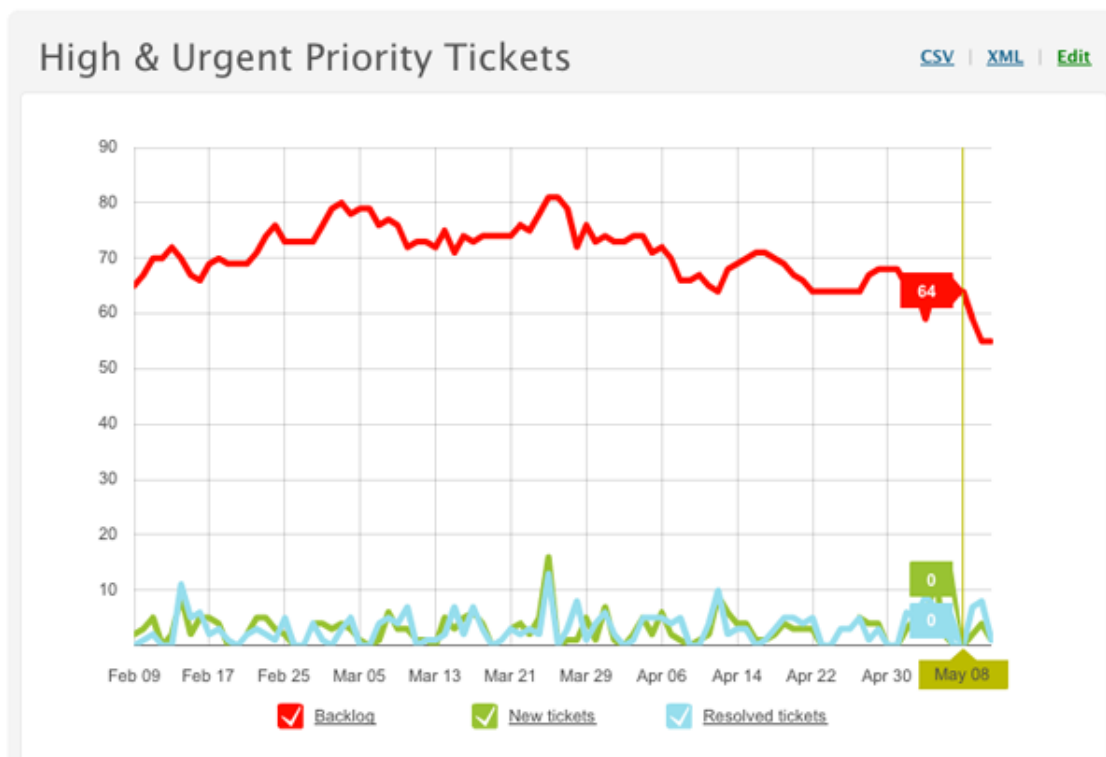
Monitoring ticket activity and agent performance with reports

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 administrators and can be used by agents.

Note: For information about Advanced Analytics with GoodData, see [Using Advanced Analytics](#).

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 support management. To view these reports, follow these steps:

1. Click the **Manage** icon (⚙️) from the sidebar, then select **Reporting**.
Zendesk Classic: Select the **Manage** menu, then select **Reporting**.
2. Click the **Reports** tab.

You can select **Edit** beside any report to see the time period and conditions that have been defined for that 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 administrators 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. Click the **Manage** icon (⚙️) from the sidebar, then select **Reporting**.

Zendesk Classic: Select the **Manage** menu, then select **Reporting**.

2. Click the **Reports** tab.
3. Click **Add report**.
4. Enter a report title.
5. Set the reporting period (described below).
6. Create one or more data series (described below).
7. To preview the report, select **Preview Report** and then click **Submit**.
8. 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 choose 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:

The image shows a date range selector interface. It consists of two date pickers separated by the word 'to'. The first date picker shows '2011' in the year dropdown, 'April' in the month dropdown, and '10' in the day dropdown. The second date picker shows '2011' in the year dropdown, 'May' in the month dropdown, and '10' in the day dropdown.

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 21: Data series conditions

Condition	Description
Priority	<p>There are four values for priority: Low, Normal, High, and Urgent.</p> <p>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:</p> <p>Priority is less than Urgent</p>
Type	<p>The ticket type values are:</p> <p>Question</p> <p>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.</p> <p>Problem is a support issue that needs to be resolved.</p> <p>Task is used by the support agents to track various tasks.</p>
Group	Select a group name.
Assignee	Select an agent.
Organization	Select an organization.
Tags	<p>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.</p>
Ticket channel	<p>The ticket channel is where and how the ticket was created and can be any of the following:</p> <ul style="list-style-type: none"> • Web form • Email • Chat • Twitter • Twitter DM (direct message) • Twitter Favorite • Voicemail • Phone call (incoming)

Condition	Description
	<ul style="list-style-type: none"> • Get Satisfaction • Feedback Tab • Web service (API) • Trigger or automation • Forum topic • Closed ticket • Ticket sharing • Facebook Post
Resolution time in hours	This is the total amount of time before the ticket was closed.
Ticket Satisfaction	<p>Ticket satisfaction rating is available to Regular, Plus, and Enterprise plans. This condition returns the following customer satisfaction rating values:</p> <ul style="list-style-type: none"> • 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
Requester's language	Returns the language preference of the person who submitted the request.
Reopens	Available in the Plus and Enterprise plans. The number of times a ticket has moved from Solved to Open or Pending.
Agent replies	Available in the Plus and Enterprise plans. The number of public agent comments.
Group stations	Available in the Plus and Enterprise plans. The number of different groups to which a ticket has been assigned.
Assignee stations	Available in the Plus and Enterprise plans. The number of different agents to which a ticket has been assigned.
First reply time in hours	Available in the Plus and Enterprise plans. The time between ticket creation and the first public comment from an agent. You can specify either calendar hours or business hours.
First resolution time in hours	Available in the Plus and Enterprise plans. The time from when a ticket is created to when it is first solved. You can specify either calendar hours or business hours.
Full resolution time in hours	Available in the Plus and Enterprise plans. The time from when a ticket is created to when it is solved for the last time. You can specify either calendar hours or business hours.
Agent wait time in hours	Available in the Plus and Enterprise plans. The cumulative time a ticket has been in a Pending state (awaiting customer response). You can specify either calendar hours or business hours.

Condition	Description
Requester wait time in hours	Available in the Plus and Enterprise plans. The cumulative time that a ticket is in a New and Open state. You can specify either calendar hours or business hours.
On-hold time in hours	Available in the Plus and Enterprise plans. The cumulative time that a ticket is in the On-hold status. You can specify either calendar hours or business hours.
<i>Custom fields</i>	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 Zendesk can be immediately exported as either a CSV or XML file. Only administrators can export reports, not agents.

To download a report

1. Click the **Manage** icon (⚙️) from the sidebar, then select **Reporting**.
Zendesk Classic: Select the **Manage** menu, then select **Reporting**.
2. Click the **Reports** tab.
3. Select a report.
4. 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.

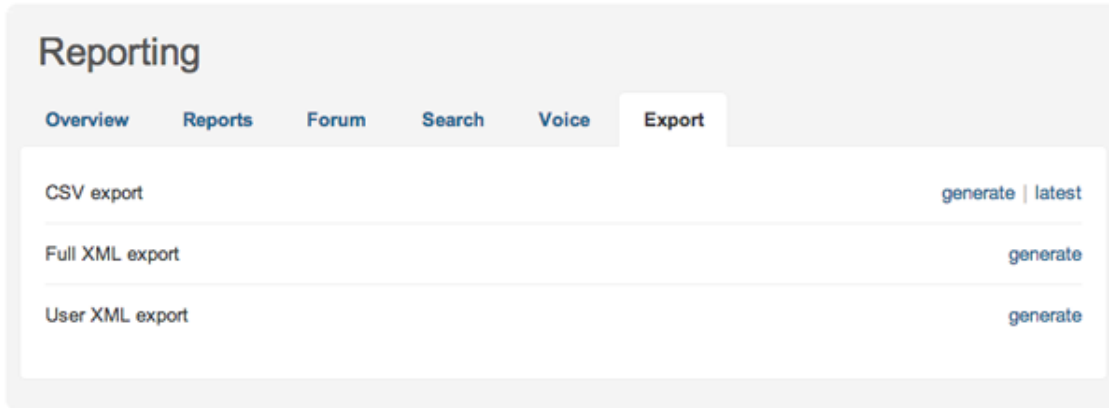
Exporting activity reports

Exporting activity reports is available to Plus and Enterprise accounts only. Only administrators can export these reports.

The reports you can download include the following:

- Details for all tickets (excluding ticket comments) 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 administrators).

These reports can be generated immediately, which is a snapshot of the data at the moment you select that option or you can grab the latest report (previously generated by yourself or another administrator).



As mentioned above, the **CSV export** option generates a report of all tickets (excluding comments). For more information about generating the CSV export and descriptions of the data that is contained within it, see [Exporting ticket data to a CSV file](#).

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](#).

Editing and cloning reports

Administrators 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. Click the **Manage** icon (⚙️) from the sidebar, then select **Reporting**.
Zendesk Classic: Select the **Manage** menu, then select **Reporting**.
2. Click the **Reports** tab.
3. Locate the report you want to edit and select **Edit**.
4. Modify the title, time period, and data series as needed.
5. Select **Update Report** and then click **Submit**.

To clone a view


1. Click the **Manage** icon (⚙️) from the sidebar, then select **Reporting**.
Zendesk Classic: Select the **Manage** menu, then select **Reporting**.
2. Click the **Reports** tab.
3. 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.
4. Enter a new name for your report and modify the title, time period, and data series as needed.

5. Select **Create Report** and then click **Submit**.

Deleting reports

Reports can be deleted. Only administrators can delete reports.

To delete a report

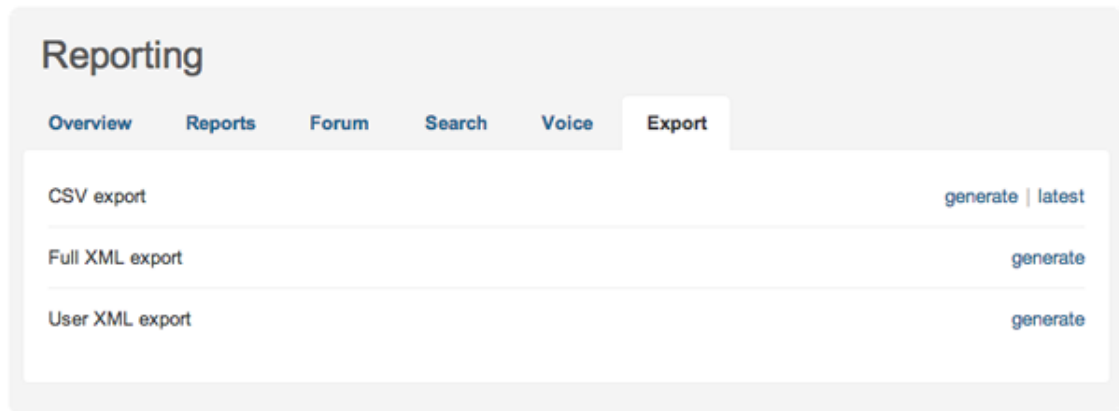
1. Click the **Manage** icon () from the sidebar, then select **Reporting**.
Zendesk Classic: Select the **Manage** menu, then select **Reporting**.
2. Click the **Reports** tab.
3. Locate the report you want to delete and select **Edit**.
4. Select **Delete Report** and then click **Submit**.

Exporting ticket data to a CSV file (Plus and Enterprise)

In the Plus and Enterprise versions of Zendesk, you can download a CSV file containing all of your ticket data. All of the data that is contained in this export is described in the table below.

To download the ticket data CSV files

1. Click the **Manage** icon (⚙️) from the sidebar, then select **Reports**.
Zendesk Classic: Select the **Manage** menu, then select **Reporting**.
2. Click the **Export** tab.
3. If you want the basic ticket data, click **Generate**.



4. 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.

When you select the latest report (you'll only see this if you've already generated an export), the most recently generated report is immediately downloaded as a zip file. The download link is valid for at least 3 days.

The CSV export contains the following data:

Data	Description
ID	The ticket number.
Requester	The name of the requester.
Requester ID	The requester's ID number.
Requester external id	The ID from an external system. Optional for accounts that have enabled enterprise single sign-on using JWT or SAML.
Requester email	The requester's primary email address.
Requester domain	The email domain of the requester's primary email address.
Submitter	The name of the initial submitter. The requester's name is displayed if the requester submitted the ticket. If an agent submitted the ticket on behalf of the requester, the agent's name is used. If requester is changed, the submitter does not change.
Assignee	The assignee at the time of export.

Data	Description
Group	The group at the time of export.
Subject	The subject of the ticket.
Tags	The tags added to the ticket at time of export.
Status	The status at time of export
Priority	Priority at the time of export.
Via	The ticket channel from which the ticket originated.
Ticket type	The type at the time of export.
Created at	The original creation time and date.
Updated at	The time and date of the most recent update.
Assigned at	The time and date of the most recent agent assignment (i.e. the time it was assigned to the current assignee).
Organization	The organization of current requester (if any).
Due date	The due date at the time of export.
Initially assigned at	The time and date of first assignment to an agent (not to a group).
Solved at	The time and date of the final or most recent change to solved status.
Resolution time	The final or most recent resolution time in hours, rounded to the nearest whole hour.
Satisfaction Score	The current satisfaction rating status (Not Offered, Offered, Good or Bad).
Group stations	The number of group assignment changes made. The initial assignment upon ticket creation also counts as a station.
Assignee stations	The number of agent assignment changes made. The initial assignment upon ticket creation also counts as a station.
Reopens	The number of times a ticket has been changed from Solved to Open (whether by agent or end-user).
Replies	The number of public agent comments on a ticket (not end-users comments or private comments).
First reply time in minutes	The time between ticket creation time and the timestamp of the first public agent comment, displayed in minutes.
First reply time in minutes within business hours	Same as above, but only time that elapses during listed business hours is counted.
First resolution time in minutes	The time between ticket creation time and the timestamp of the first change of status to solved, displayed in minutes.
First resolution time in minutes within business hours	Same as above, but only time that elapses during listed business hours is counted.

Data	Description
Full resolution time in minutes	The time between ticket creation time and the timestamp of the final or most recent change of status to solved, displayed in minutes.
Full resolution time in minutes within business hours	Same as above, but only time that elapses during listed business hours is counted.
Agent wait time in minutes	The total time spent in the Pending status, displayed in minutes.
Agent wait time in minutes within business hours	Same as above, but only time that elapses during listed business hours is counted.
Requester wait time in minutes	The combined total time spent in the New and Open statuses. If the ticket is reopened after being solved, time spent in Solved status is counted as well. Time after final change to Solved status is not included.
Requester wait time in minutes within business hours	Same as above, but only time that elapses during listed business hours is counted.
On hold time in minutes	The total time spent in the On-hold status, displayed in minutes.
On hold time in minutes within business hours	Same as above, but only time that elapses during listed business hours is counted.

Using customer satisfaction ratings

Your end-users (customers) can provide feedback about their support experience 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.

Customer satisfaction rating is available for Plus, Regular, and Enterprise.

Logging in not required to rate tickets

End-users do not have to be logged in to the Web portal 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 Web portal. The rating prompt is shown on all solved tickets. 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 administrator) enable satisfaction rating (see [Enabling customer satisfaction rating](#)), a system generated automation called **Request customer satisfaction rating** is added to your Zendesk. 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](#).

Note: As noted above, the survey is sent when the ticket is set to Solved. It's possible to use a different status in the automation, such as Pending, but the ticket would have had to be set to Solved at least once before.

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 example:

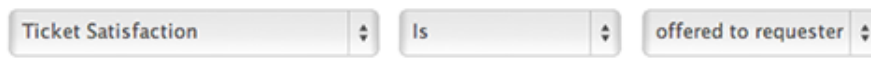
```
Your request (##{{ticket.id}}) has been deemed solved.

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}}
```

You'll also want to add the following action to your trigger to indicate that you have offered the requester the opportunity to rate the ticket.



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.

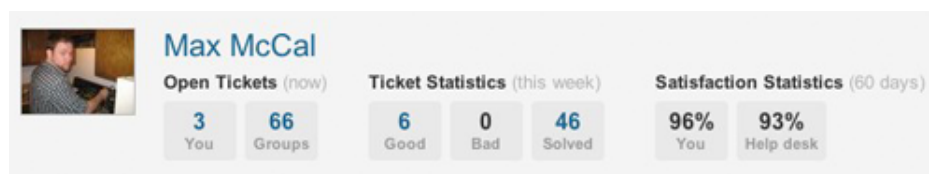
Community tip! [Joe Tinter](#) shows you how to set up a trigger to send a survey for re-evaluation after you've followed up with a customer who left a bad rating! Check it out in our [Community Tips forum](#).

How agents receive the satisfaction rating feedback

The results of customer satisfaction rating are shown in your Zendesk, 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 all of the agents in your Zendesk over the last 60 days (including the current day).

Note: You must have the agent dashboard enabled to see the customer satisfaction ratings. An administrator can do this on the **Agents** settings page.



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 your Zendesk. The two ratings provide feedback about individual performance and the average performance of all agents.

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 the agents in your Zendesk account) 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 your Zendesk. You cannot exclude individual agents from receiving ratings on the tickets they are assigned to.

Additionally, ratings cannot be moderated. All ratings are shown.

Enabling customer satisfaction rating

By default, customer satisfaction rating is disabled. It can be enabled by an administrator.

To enable customer satisfaction rating

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Customers**.
Zendesk Classic: Select the **Settings** menu, then select **End-users**.
2. Select the **Satisfaction** tab.
3. Select **Allow customers to rate tickets**.
4. Click **Save tab**.

Your Zendesk 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.

Automation title

Request customer satisfaction rating (System Automation)

Meet **all** of the following conditions:

Status	Less than	Closed	-
Hours since solved	Is	24	-
Ticket Satisfaction	Is	Unoffered	-
Add condition			+

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 values:

- **Unoffered** means that the survey has not previously been sent
- **Offered** means that the survey has already been sent
- **Bad** is the requester's negative rating
- **Bad with comment** is the requester's negative rating with their comment
- **Good** is the requester's positive rating
- **Good with comment** is the requester's positive rating with their comment

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.

Perform these actions:

Email user: (requester)

Email subject: Request #{{ticket.id}}: How would you rate the support you received?

Email body:

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 by clicking either link below:

{{satisfaction.rating_section}}

Here's a reminder of what your ticket was about:

{{ticket.comments_formatted}}

[View available placeholders »](#)

Ticket Satisfaction is offered to requester

Add action

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. All of these placeholders can be used in various ways and are described in the following table.

Table 22: Customer satisfaction rating placeholders

Placeholder	Description
<code>{{satisfaction.rating_section}}</code>	A formatted block of text prompting the user to rate satisfaction. How would you rate the customer service you received? Good, I'm satisfied Bad, I'm unsatisfied
<code>{{satisfaction.current_rating}}</code>	The text value of the current satisfaction rating, either Good or Bad.
<code>{{satisfaction.positive_rating_url}}</code>	A URL to rate the support positively.
<code>{{satisfaction.negative_rating_url}}</code>	A URL to rate the support negatively.

Placeholder	Description
{{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:

Report title

Reporting period

Relative to today
 Fixed date interval

Data series

Remove

 -

 +

Remove

 -

 +

[Add data series »](#)

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.

Using the Reporting dashboard

The Reporting dashboard gives you insight into how your Zendesk is running. It provides data about your ticket volume and management, forums usage, and agent performance. It also enables you to compare key ticket metrics within your Zendesk, and further compare your Zendesk to industry averages.

The data in the Reporting dashboard is updated on an hourly basis.

Zendesk Classic: The Reporting dashboard is not available in Zendesk Classic. It is only available in the current version of Zendesk.


The Reporting dashboard contains an Overview tab, available to Regular, Plus, and Enterprise accounts. Plus and Enterprise accounts have access to additional tabs. The Reporting dashboard includes:

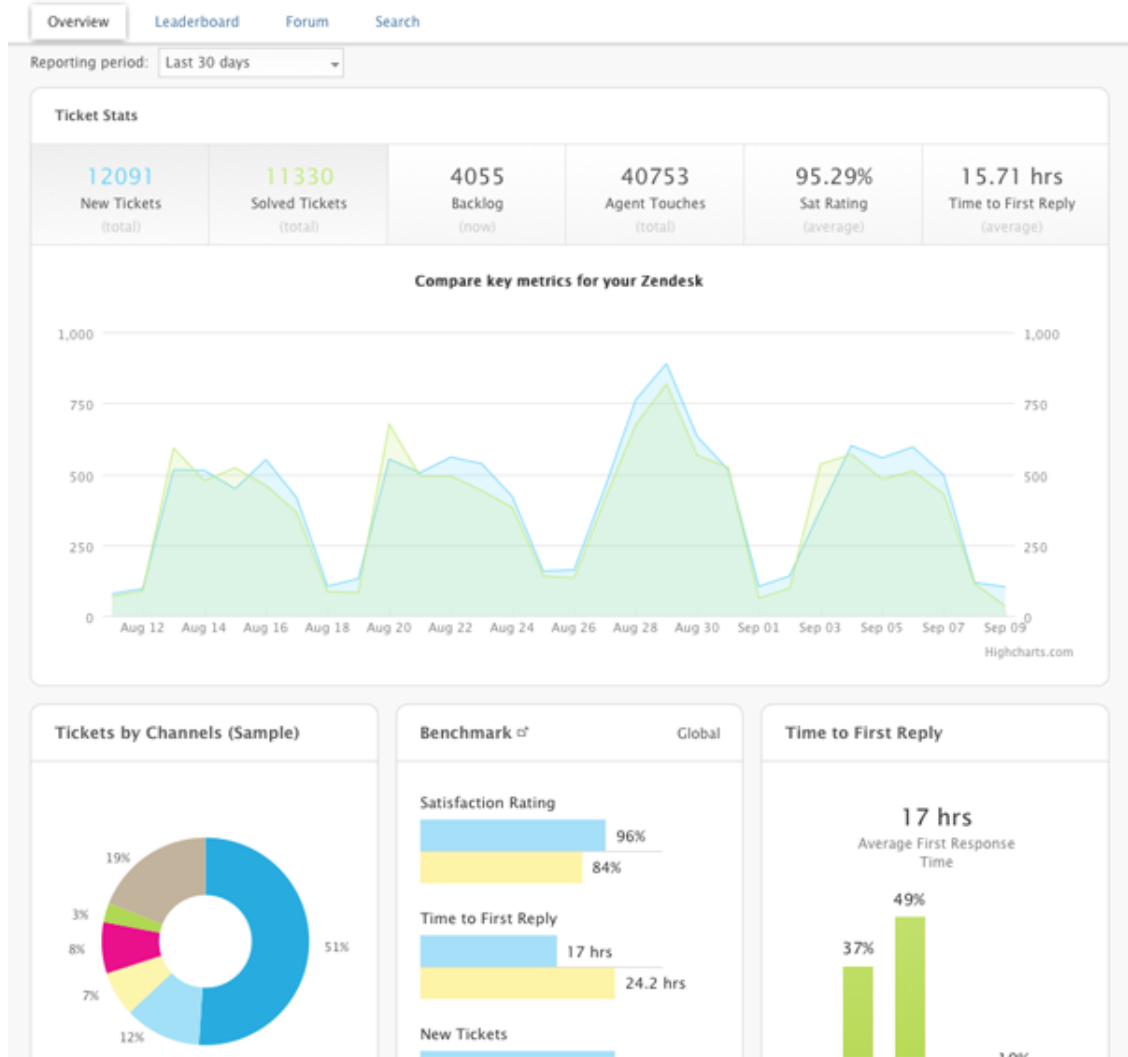
- **Overview** (Regular, Plus, and Enterprise) shows ticket stats in the top section and enables you to view a single ticket statistic or compare two ticket statistics. The middle section gives you more ticket data, including a comparison to industry standards. The bottom section enables you to view data about your forum articles, end-user searches, and agent performance.
- **Leaderboard** (Plus and Enterprise only) provides an agent leaderboard and enables you to gauge agent performance.
- **Forums** (Plus and Enterprise only) gives you forum analytics to monitor activity in your knowledge base and forums. See [Analyzing forum activity](#).
- **Search** (Plus and Enterprise only) gives you search analytics so that you can review end-user search terms and their results. See [Analyzing knowledge base search activity](#).
- **Advanced Analytics** (Plus and Enterprise only) enables you to access pre-built reports and customize your own dashboards and reports. See [Using Advanced Analytics](#).

For Regular and Plus accounts, administrators and agents can access the Overview tab, but only administrators can access the other tabs. For Enterprise accounts, administrators can access all tabs, and also any agents who have permission to view reports according to their custom role. For information about permissions for Regular and Plus accounts, see [Adding end-users, agents, and administrators](#). For information about permissions for Enterprise accounts, see [Custom agent roles](#).

Note: For Enterprise accounts, you can restrict agent access to the Reporting dashboard by assigning agents to a custom role that does not include permission to view reports.

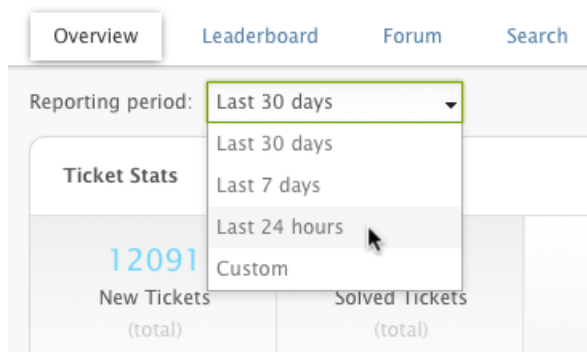
To use the Reporting dashboard

1. Click the **Reporting** icon () in the sidebar to display the Reporting dashboard.



2. Select a **Reporting period** at the top of the dashboard.

You can choose a predefined period or choose **Custom** to set a specific range up to three months.



3. Analyze the data that appears in the **Overview** tab.

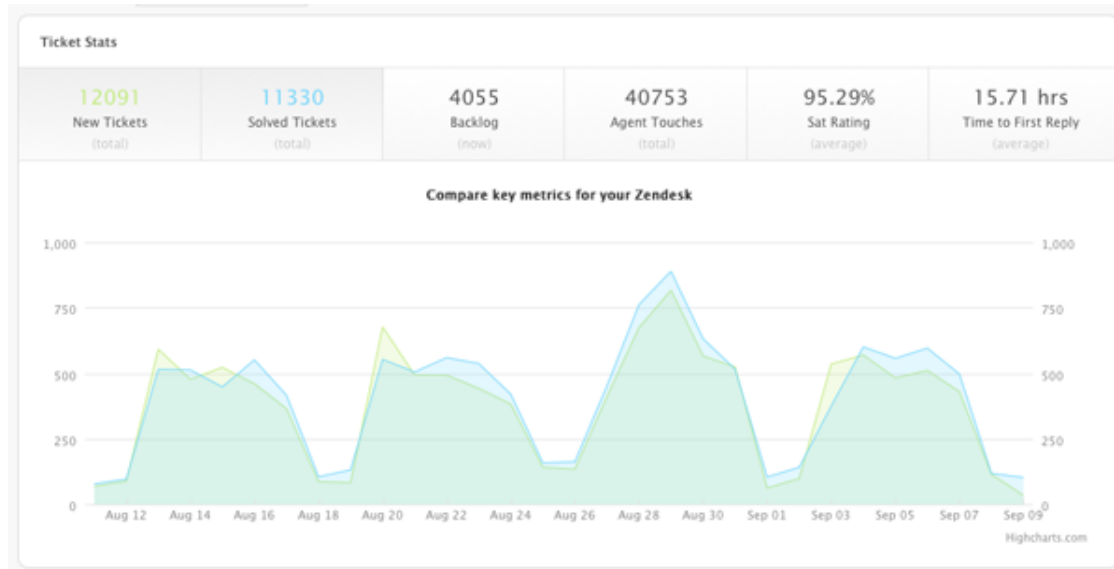
For more information, refer to the sections below.

4. (Plus and Enterprise only) Click the **Leaderboard**, **Forum**, **Search**, or **Advanced Analytics** tab to drill-down into more data.

For information about forum analytics, see [Analyzing forum activity](#). For information about search analytics, see [Analyzing knowledge base search activity](#). For information about Advanced Analytics, see [Using Advanced Analytics](#).

Comparing key ticket metrics

The top of the Overview in the Reporting dashboard contains options for viewing ticket statistics.



- **New Tickets** is the number of new tickets created during the reporting period.
- **Solved Tickets** is the number of solved tickets during the reporting period.
- **Backlog** is the number of unsolved tickets in your Zendesk during the reporting period.
- **Agent Touches** is number of agent updates to tickets during the reporting period.
- **Satisfaction Rating** is the average customer satisfaction rating given during the reporting period.
- **Time to First Reply** is the average amount of time it took an agent to make a public response in a ticket (in calendar hours).

When you click one of the ticket stat options, you see a detailed graph that includes daily totals for each day of the reporting period. You can change the reporting period for any of the ticket stats. And you can view one ticket stat at a time or you can chose to compare two ticket stats.

To view or compare key ticket metrics in your Zendesk

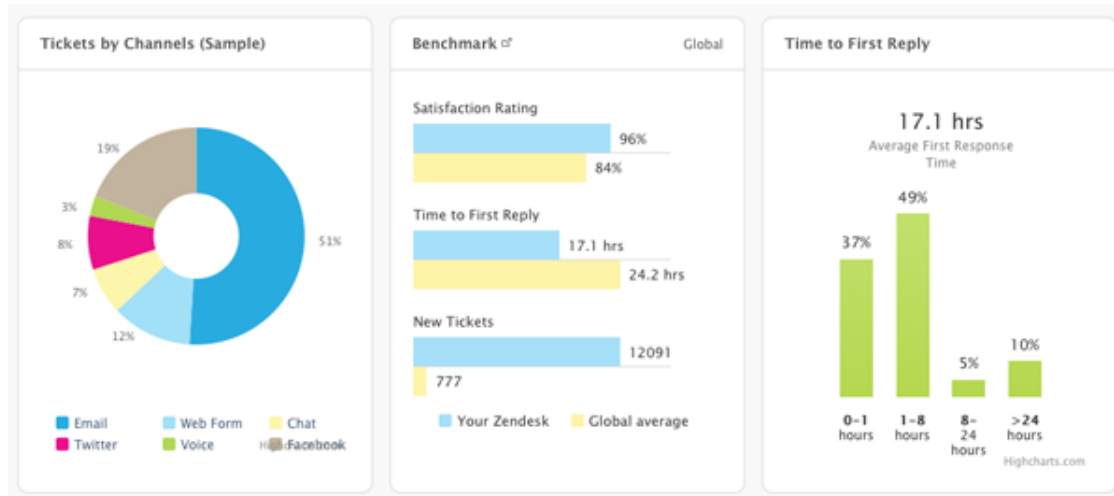
1. Click the **Reporting** icon (📊) in the sidebar to open the Reporting dashboard.
2. Select a **Reporting period** at the top of the dashboard.

You can chose a predefined period or chose **Custom** to set a specific range up to three months.

3. Click one of the ticket stats at the top to view that data.
4. If you want to compare two stats, click a second ticket stat.
5. Hover your mouse over the graph to see daily totals.

Viewing more ticket stats

In addition to viewing key ticket metrics in the top section of the Overview in the Reporting dashboard, the middle section of the Overview contains three panels for viewing additional ticket statistics.



- **Tickets by Channel** shows what percentage of your tickets come from each of your supported channels.
- **Benchmark** enables you to compare your key ticket stats to industry standards. You can see the industry standards for customer satisfaction, time to first reply, and number of new tickets compared to those metrics for your Zendesk.
- **Time to First Reply** shows the average amount of time it took an agent to make a public response in a ticket. That is, the time from when a ticket came in, to when it received a public comment, averaged for all tickets in the reporting period. The graph includes a breakdown by hours, showing what percentage of tickets were responded to within a specific number of hours (0-1, 1-8, 8-24, or >24). Tickets that do not have a public comment are not included. For example, if a ticket is closed without a public comment, it does not have a first response time, and is not included in the Time to First Reply calculation.

To view your tickets by support channel

1. Click the **Reporting** icon (📊) in the sidebar to open the Reporting dashboard.
2. Select a **Reporting period** at the top of the dashboard.

You can choose a predefined period or choose **Custom** to set a specific range up to three months.

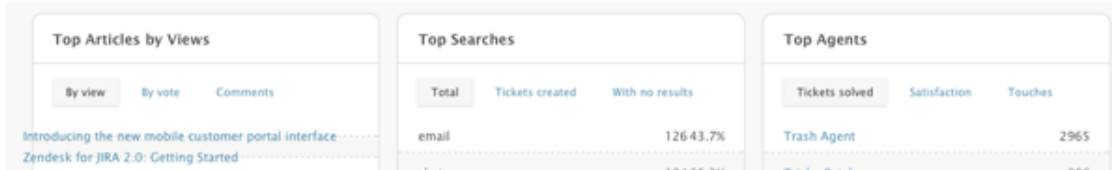
3. Refer to the appropriate reporting panel in the middle section of the overview: **Tickets by Channels**, **Benchmark**, or **Time to First Reply**

Note: In the **Benchmark** report panel, if you do not see industry standards data, you need to complete a brief survey about your industry so that you get the correct data. You must be an account owner to complete the survey. To do so, click the **Manage** icon (⚙️) in the sidebar, then select **Account**. Click the **Benchmark** tab and complete the survey. It might take some time for your **Benchmark** report panel to update in the Reporting dashboard.

Zendesk Classic: Select the **Settings > Account**, then click the **Benchmark** tab to complete the survey.

Viewing top articles, searches, and agents

The bottom section of the Overview in the Reporting dashboard contains three panels for viewing data about your forum articles, end-user searches, and agent performance.



- **Top Articles** shows your top forum articles according to the number of views, votes, or comments during the reporting period.
- **Top Searches** shows your top end-user search queries, end-user search queries that resulted in tickets being created, and end-user search queries with no results during the reporting period.
- **Top Agents** shows your top agents according to number of tickets solved, customer satisfaction ratings, and number of ticket updates during the reporting period.

To view your top articles, searches, or agents

1. Click the **Reporting** icon (■) in the sidebar to open the Reporting dashboard.
2. Select a **Reporting period** at the top of the dashboard.

You can choose a predefined period or choose **Custom** to set a specific range up to three months.

3. Refer to the appropriate reporting panel at the bottom of the Overview: **Top Articles**, **Top Searches**, or **Top Agents**.
4. Click one of the tabs in the panel to change the data.
5. (Plus and Enterprise only) Click **See all** at the bottom of the panel to expand the data.

This takes you away from the Overview tab and opens another tab of the Reporting dashboard, according to your selection.

Monitoring performance with SLA service levels

A Service Level Agreement, or SLA, is an agreed upon measure of the average response and resolution times that your support team delivers to your customers. Providing support based on service levels ensures that you're delivering measured and predictable service. It also provides greater visibility when problems arise.

You can define SLA service targets in Zendesk so that you and your agents can monitor your service level performance and meet your service level goals. Zendesk highlights tickets that fail to meet service level targets so that you can promptly identify and address problems.

Note: You can create more complex service level targets with automations and views. For more information, see [Using automations to create service level targets](#).

Topics covered in this article:

- [Understanding SLA service targets in Zendesk](#)
- [Using the predefined service targets](#)
- [Adding a service target](#)
- [Updating a service target](#)
- [Reviewing service level performance](#)
- [Performance monitoring for agents](#)

Understanding SLA service targets in Zendesk

Service targets in Zendesk are based on ticket priority, such as low, normal, high, urgent, or a combination of these. For example, you can specify that high priority tickets should be assigned to an agent within one hour and solved within 24 hours.

The following example sets out four service targets based on the priority of reported issues. Ticket priority is set by agents based on the severity and urgency of the requests.

	LOW	NORMAL	HIGH	URGENT
PRIORITY DESCRIPTION				
Severity	Hindrance to the work of individual users and/or an acceptable work around is available.	Interruption to the work of individual users and no acceptable work around is available.	Interruption to critical processes affecting individual users and no work around available.	Interruption to critical business processes affecting many users and no work around available.
Urgency	Immediate resolution is not needed by the customer.	Immediate resolution is not needed by the customer.	Immediate resolution is needed by the customer.	Immediate resolution is needed by the customer.
SLA CONDITIONS				
95% must be assigned within	8 Hours	2 Hours	1 Hour	1 Hour
and solved within	1 Week	2 Days	24 Hours	8 Hours

The service target for normal priority tickets in the example is defined in Zendesk as follows:

Fulfillment target 95 %

Percentage of tickets that, according to your SLA, must comply with the conditions below.

SLA Conditions

(any ticket type) with a priority equal to Normal

and in organization (None) (select "None" to use any organization)

using calendar hours business hours

must be assigned to an agent within 2 hours

and solved within 2 days (48 hours)

Note: The **Fulfillment Target** percentage has no effect in Zendesk.

After defining your service targets, you can monitor performance. Zendesk highlights the number of tickets, if any, that currently fail to meet each target, and provides links to the tickets. Example:

SLA service targets

SLA service targets are business rules you create for your Service Level Agreements (SLAs). SLAs are agreed upon measurements of average response and resolution times that your support team delivers to customers. [Learn more](#)

Active targets (2)

Incidents with priority < Urgent: Must be assigned to an agent within 24 hours and must be solved within 120 hours

- [Incidents with priority < Urgent: Unassigned in 24h \(1\)](#)
- [Incidents with priority < Urgent: Unsolved in 120h \(0\)](#)


Tickets with priority = Urgent: Must be assigned to an agent immediately and must be solved within 1 hour

- [Tickets with priority = Urgent: Unassigned in 0h \(2\)](#)
- [Tickets with priority = Urgent: Unsolved in 1h \(0\)](#)

Using the predefined service targets

Zendesk provides a number of predefined service targets. You can activate any of them or modify them to match your service levels.


To activate or edit a predefined target

1. Click the **Manage** icon () in the sidebar, then select **Service Level Agreements** in the Business Rules section.
2. To activate a target, hover the mouse over the target to display the **Activate** link, and then click the link.
3. To edit a target, click the **Edit** link. See *Updating a service target*.


Inactive targets (4)

Incidents with priority < Urgent: Must be assigned to an agent within 24 hours and must be solved within 120 hours	edit
Tickets with priority < Urgent: Must be assigned to an agent immediately and must be solved within 1 hour	activate edit
Tickets with priority = Urgent: Must be assigned to an agent immediately and must be solved within 1 hour	edit
Tickets: Must be assigned to an agent within 1 hour and must be solved within 1 hour	edit

Adding a service target

1. Click the **Manage** icon () in the sidebar, then select **Service Level Agreements** in the Business Rules section.
2. Click **Add Target** in the upper-right corner of the page.
3. Define the conditions of the target.
4. Click **Add SLA Service Target**.


Updating a service target

1. Click the **Manage** icon () in the sidebar, then select **Service Level Agreements** in the Business Rules section.
2. Click **Edit** on the right side of any existing service target.
3. Update the conditions of the target.
4. Click **Update SLA Service Target**.

Reviewing service level performance

If you're an administrator, you can review your service level performance within Zendesk.

To review performance

1. Click the **Manage** icon () in the sidebar, then select **Service Level Agreements** in the Business Rules section.

The page shows all active service targets, their rules, and the number of tickets, if any, that currently fail to meet each rule.

Active targets (2)

Incidents with priority < Urgent: Must be assigned to an agent within 24 hours and must be solved within 120 hours

[Incidents with priority < Urgent: Unassigned in 24h \(1\)](#)

[Incidents with priority < Urgent: Unsolved in 120h \(2\)](#)




2. Click a rule to review the tickets, if any.

Performance monitoring for agents

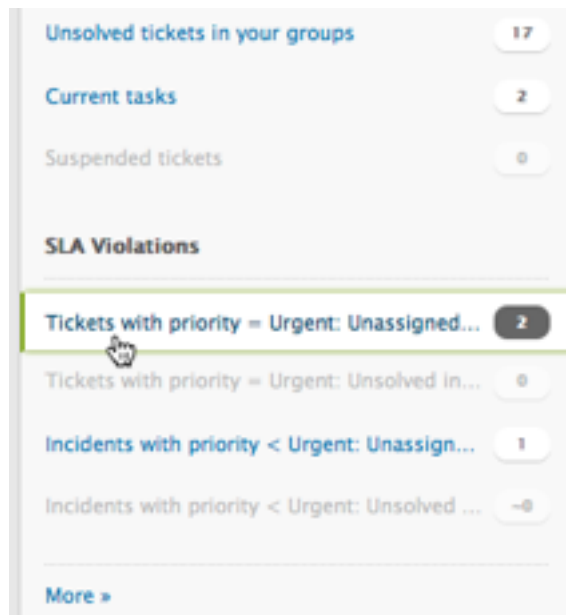
Your agents can monitor performance against targets by checking their views. The default views include views of the service level agreements and links to any tickets in violation of the agreements.

To monitor performance as an agent

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

Classic: Click **Views** on the toolbar.

The views include a category of SLA views:



2. Click a SLA view to see the tickets.

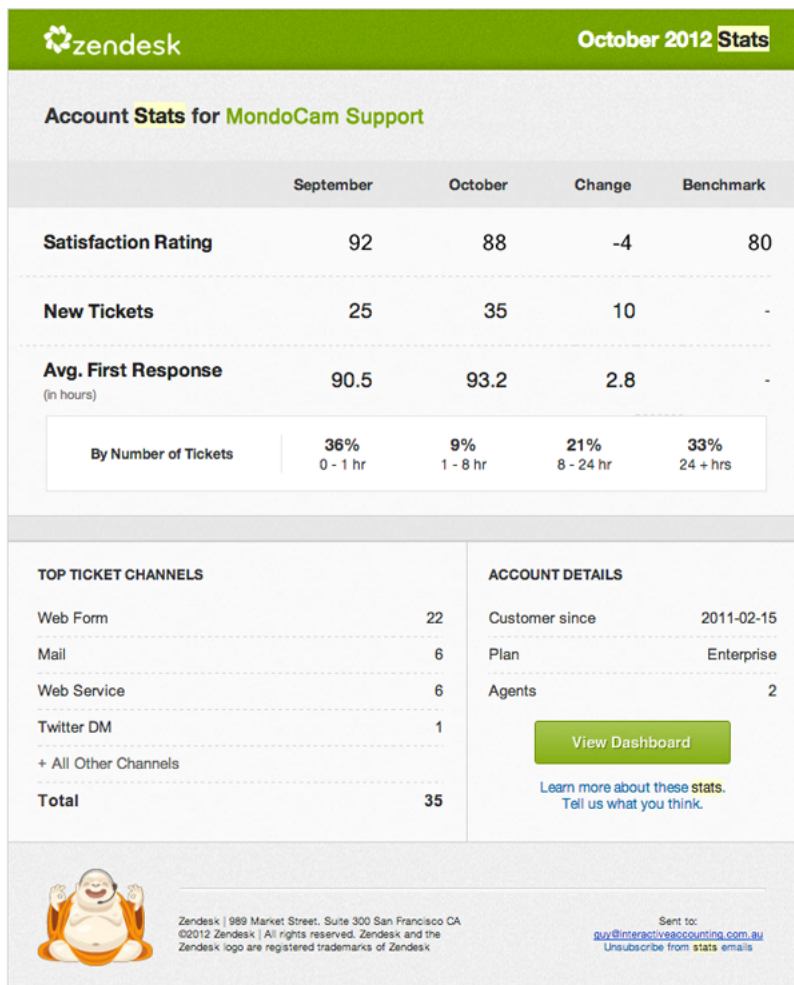
About the monthly account usage email

The monthly account usage email provides a snapshot of activity in your Zendesk for the month. The account usage email is sent directly to account owners and administrators via email. It is not currently possible to add custom recipients.

You will not receive the account usage email if:

- You have unsubscribed to Zendesk emails
- You have not been using your Zendesk for more than two consecutive months

The email summary provides key statistics for your Zendesk, ticket totals for your support channels, and an overview of your account details.



Note: If you previously unsubscribed to Zendesk emails, but would like to subscribe so that you can receive the monthly account usage email, contact support@zendesk.com.

Looking at account stats for your Zendesk

The Account Stats section of your account usage email contains the following information:

- **Satisfaction rating** is the overall rating for your Zendesk, including all users and groups. The rating is determined by:

$$\text{Rating \%} = \left(\frac{\text{Total positive ratings (30 days)}}{\text{Total of all ratings (30 days)}} \right) * 100$$

If you have not enabled customer satisfaction ratings for your Zendesk, you can click the link in your account usage email to do so. For more information, see [Using customer satisfaction ratings](#).

- **New tickets** is the total number of new tickets created in your Zendesk during the calendar month.
- **Avg. first response** is the average number of hours from the time a ticket was created to the time of the first public agent comment for all tickets created in the calendar month. Time is based on calendar hours, not business hours.

For each of these account stats, you can compare the current month to the previous month and you can see the difference (or *change*) between the two months.

You can also compare your Zendesk to the standard for companies in your industry, if you have completed the benchmark survey. If you do not see data in the Benchmark column, you can click the link to complete the survey.

Note:

To find the benchmark survey in your Zendesk, click the **Manage** icon (⚙️) in the sidebar, then select **Account**. Click the **Benchmark** tab and complete the survey.

Zendesk Classic: Select the **Settings > Account**, then click the **Benchmark** tab to complete the survey.

Looking at your top ticket channels

The Top Ticket Channels section of your account usage email shows the number of new tickets for the month according to channel.

This section lists your four support channels that received the most new tickets this month. New tickets from any other support channels you have are totaled in the All Other Channels line item.

The total in the Top Ticket Channels section equals the number of new tickets for the current month in the Account Stats section at the top of the email.

You can find information about the various support channels in our [Tickets and channels forum](#).

Setting up Advanced Analytics (Plus and Enterprise)

Advanced Analytics provides advanced reporting and metrics. You can use pre-built reports or build your own custom reports on configurable dashboards.

Zendesk Classic: Advanced Analytics is not available in Zendesk Classic. It is only available in the current version of Zendesk.

Note:

Advanced Analytics is available to Plus and Enterprise customers. You must be an administrator or have permission to view reports to use Advanced Analytics. For information about permissions for Plus accounts, see [Adding end-users, agents, and administrators](#). For information about permissions for Enterprise accounts, see [Custom agent roles](#).

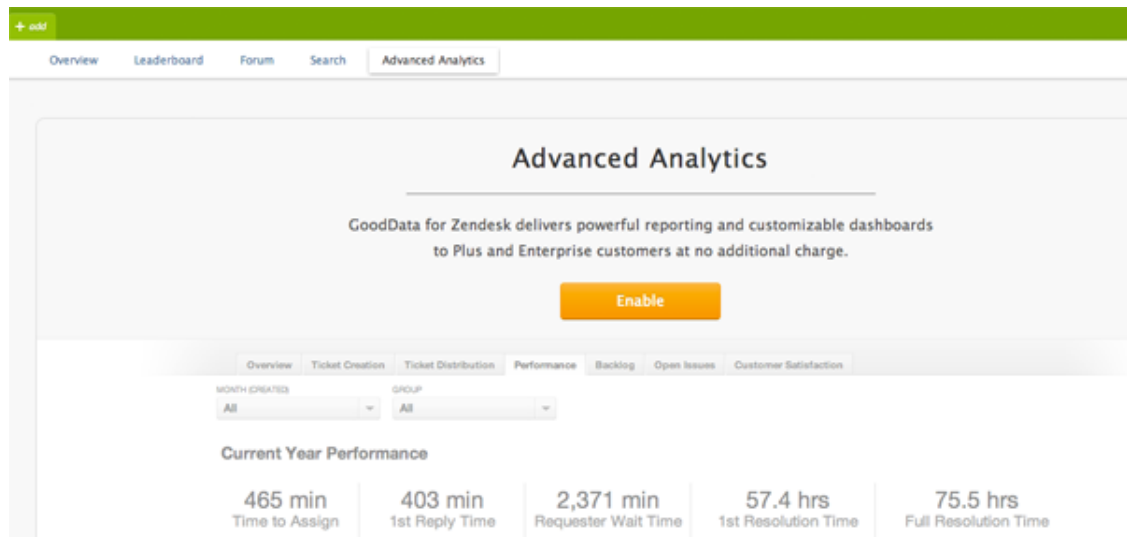
Advanced Analytics is powered by GoodData. If you already use GoodData for Zendesk, you don't need to do the set up described in this topic. To start using Advanced Analytics, see [Using Advanced Analytics](#).

If you have not used GoodData for Zendesk, you need to enable Advanced Analytics for your Zendesk and invite agents to join the project, as described in this topic.

Plus customers can set the daily sync time to export ticket data and update Advanced Analytics. Enterprise customers receive hourly updates for ticket data, so do not need to set a daily sync time.

To enable Advanced Analytics for your Zendesk

1. Click the **Reporting** icon (📊) in the sidebar, then click the **Advanced Analytics** tab.
2. Click **Enable**.



3. Review the GoodData Terms and Conditions, then click **Create** to set up your account if you agree.

It might take several minutes to complete the set up.

4. Check your email for an invitation from GoodData, then click the link in the email to register your account.

5. Complete the registration information and join the project.

Advanced Analytics automatically loads in your Zendesk. It might take up to 30 minutes to load data in your dashboards the first time.

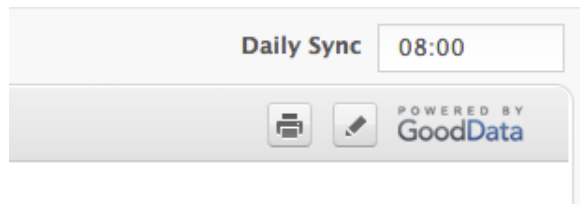
After you enable Advanced Analytics, you can access your project through Zendesk. Other agents will not automatically have access. To give access to other agents, you need to invite them to join the project.

To invite others to join the project

1. Log in to GoodData at secure.gooddata.com.
2. Click **Manage**, then click the **Project & Users** tab.
3. Enter email addresses to invite users to the project.

To set the sync time for your daily ticket data export (Plus only)

1. Click the **Reporting** icon (▮▮▮) in the sidebar, then click the **Advanced Analytics** tab.
2. Select a **Daily Sync** time in the upper-right corner.



Note: Enterprise customers receive automatic hourly updates, so they do not need to set a daily sync time. Each sync begins one hour after the current sync ends. That is, a sync begins one hour after ticket data is exported and your Advanced Analytics project is updated.

At the daily sync time your current ticket data is exported, then your Advanced Analytics project is updated.

Using Advanced Analytics (Plus and Enterprise)

If you have enabled Advanced Analytics by setting up your GoodData project, then you are ready to use Advanced Analytics. If you have not, see [Setting up Advanced Analytics](#) to complete the setup.

Zendesk Classic: Advanced Analytics is not available in Zendesk Classic. It is only available in the current version of Zendesk.


If you already use GoodData for Zendesk, you can access your existing reports and dashboards in Advanced Analytics without any extra set up.

Advanced Analytics enables you to access pre-built reports and customize your own dashboards and reports. Specifically, you can:

- **Slice and dice data the way you want to see it.** Filter on data and drill down to understand the details behind your support behavior.
- **Use prebuilt dashboards and reports.** Get metrics relevant to your Zendesk immediately with pre-built reports and dashboards.
- **Build custom dashboards and reports:** Create your own reports around any ticket field or tag and publish reports to a configurable dashboard.
- **Keep reports up-to-date with regular ticket data exports:** For Plus customers, your Zendesk ticket data is exported daily to sync your Advanced Analytics project with the current state of your Zendesk. For Enterprise customers, ticket data is exported hourly; each sync begins one hour after ticket data is exported and your Advanced Analytics project is updated.

Advanced Analytics is available to Plus and Enterprise customers. You must be an administrator or have permission to view reports to use Advanced Analytics. For information about permissions for Plus accounts, see [Adding end-users, agents, and administrators](#). For information about permissions for Enterprise accounts, see [Custom agent roles](#).

To open Advanced Analytics

1. Click the **Reporting** icon () in the sidebar.
2. Click the **Advanced Analytics** tab.
3. Log in to GoodData.

Your Advanced Analytics dashboards appear.

To switch dashboards

- In Advanced Analytics, click the **Dashboards** drop-down in the upper-left, then select a dashboard.

Using prebuilt reports

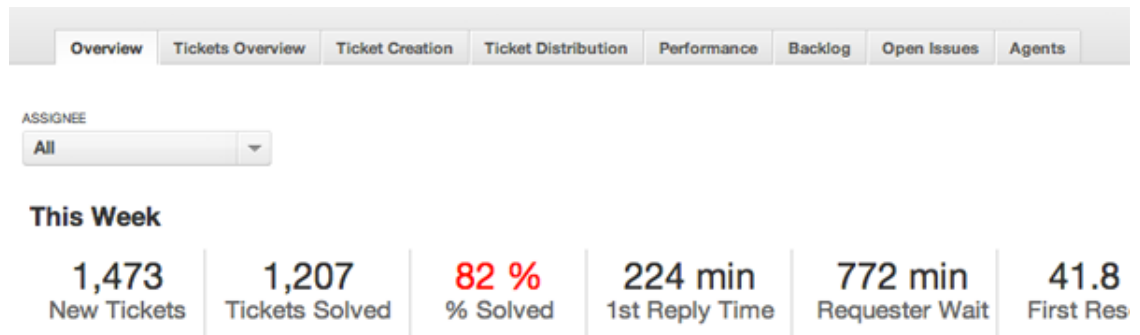
Advanced Analytics provides prebuilt reports in tabs in a pre-configured dashboard.

- **Overview** gives you a snapshot of data from your Zendesk for the current week and the last week.
- **Ticket Creation** shows the number of new tickets by month, by channel, and by group. It also shows new tickets by shift and time of day.
- **Ticket Distribution** shows your overall ticket distribution by time, group, and customer.
- **Performance** shows performance for your Zendesk, your groups, and your agents.

- **Backlog** shows the number and distribution of tickets in your backlog. It also shows the most unsolved tickets by organization and the oldest tickets in your backlog.
- **Open Issues** gives you statistics about your unsolved tickets. You can see how many tickets are open, were re-opened, and were escalated. You can also see tickets with multiple agents and high-wait times.
- **Customer Satisfaction** shows your customer satisfaction rating over time.

To view prebuilt reports

1. Open Advanced Analytics.
2. In the **Dashboard** drop-down list, select Advanced Metrics, if it's not already selected.
3. Click any tab in the dashboard to view the prebuilt reports.

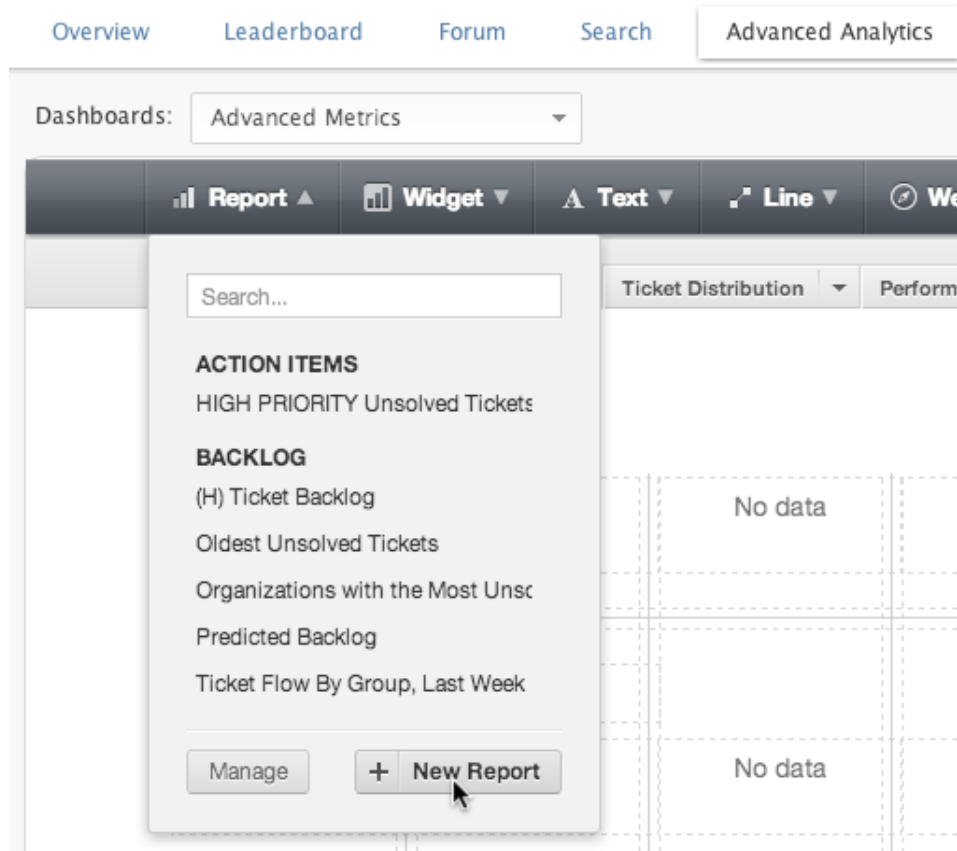


Creating custom reports and dashboards

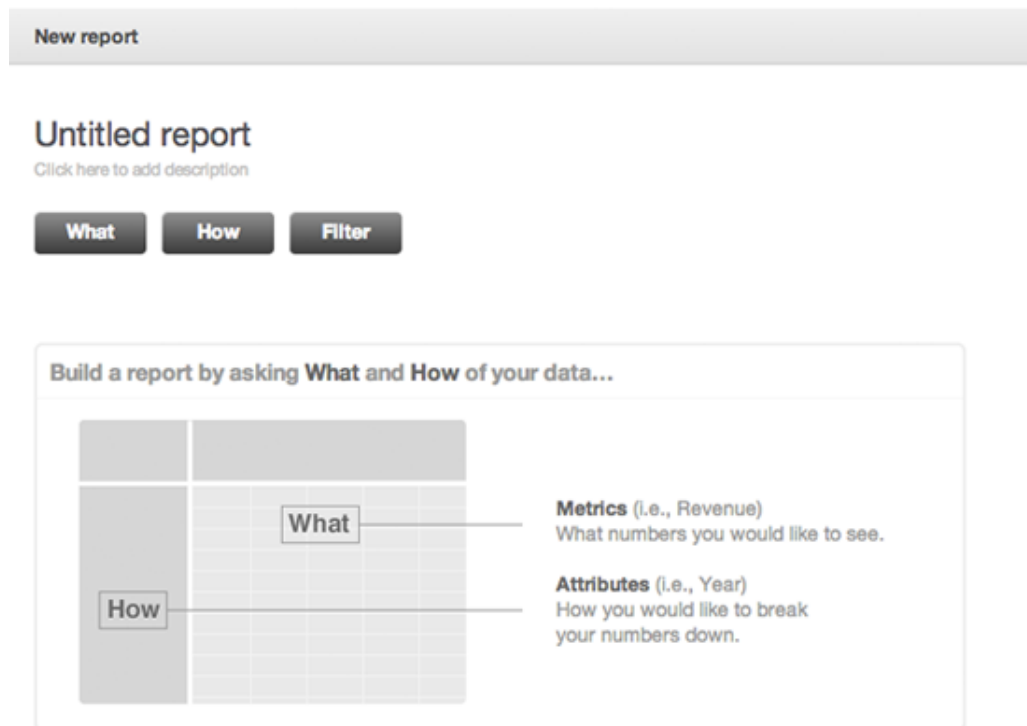
You can add a new report to an existing tab in a dashboard or you can create a new tab and then add a new report.

To create a new report on an existing tab in a dashboard

1. Open Advanced Analytics.
2. Click the **Edit** pencil icon in the upper-right of your dashboard.
3. Click **Reports**, then click **Create new report**.



4. Configure your new report, then click **Done** when you're finished.

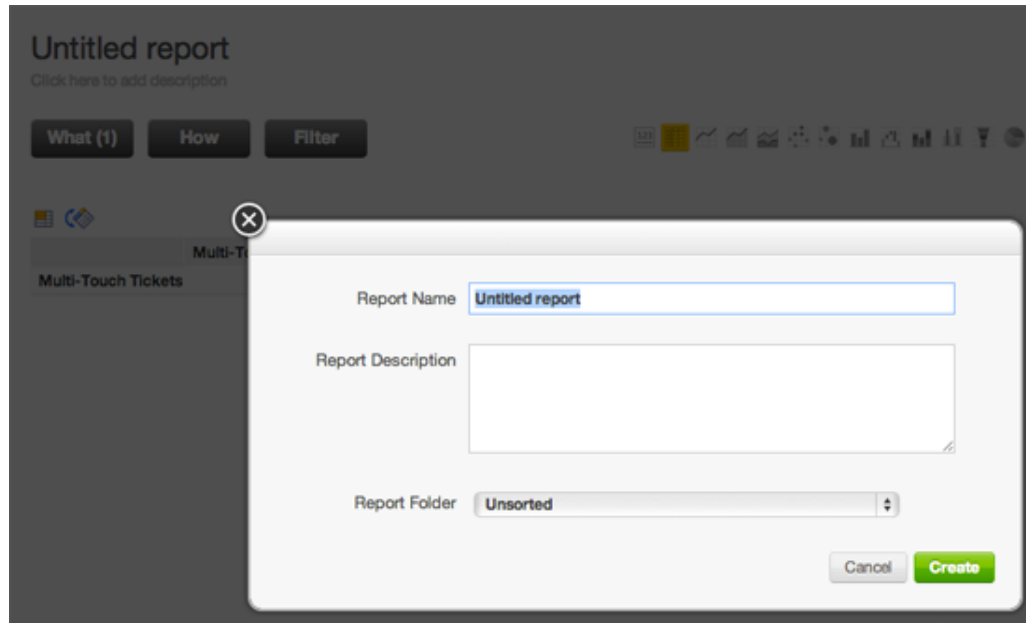


For more information about creating reports, see [How to create reports in GoodData](#) on the GoodData website. Also, see the example in [Build reports with GoodData for Zendesk](#) on the Zendesk website.

For information about reporting on tags, see [Advanced Analytics: Tag reporting](#).

Note: Enterprise accounts can export data for up to 200 custom fields in their reports. Plus accounts can export data for up to 60 custom fields.

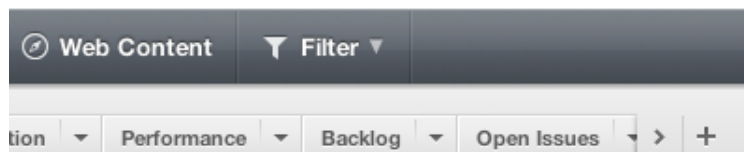
5. When your report appears, click **Create** in the upper-right.
6. In the dialog box, enter a report name and description and select a folder, then click **Create**.



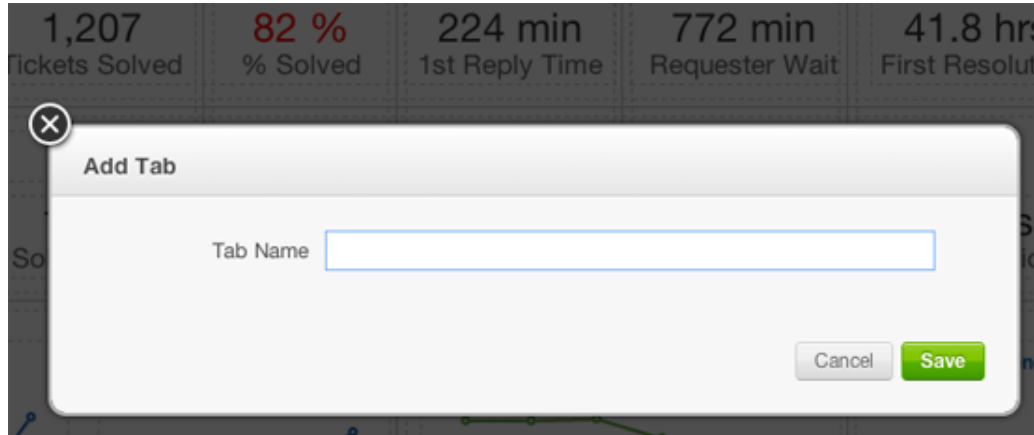
7. Position the report.

To add a tab to a dashboard and then create a new report

1. Open Advanced Analytics.
2. Click the **Edit** icon in the upper-right of your dashboard.
3. Click the **Plus (+)** at the end of the dashboard tabs.



4. In the **Add Tab** dialog box, enter a **Tab name**, then click **Save**.



5. Click **Reports**, then click **Create new report**.
6. Follow the steps in the procedure above to create your report.

To rename, duplicate, or delete a tab in a dashboard

- In Advanced Analytics, click the arrow beside the tab you want to modify, then select the appropriate action.

To create a new dashboard

- Open a project in GoodData, then click the **Edit, Embed, or Export** gear icon in the upper-right and select **Add dashboard**.

Note: In Advanced Analytics you cannot add a dashboard to a project. You can, however, go to GoodData to add a dashboard to your project.

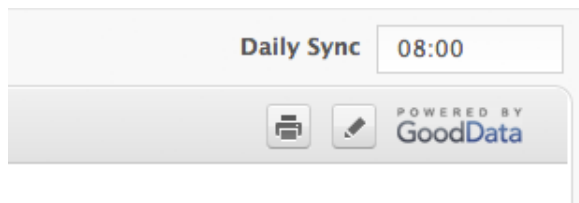
Sharing reports

You can collaborate and share projects, reports, and results with colleagues and management.

In Advanced Analytics you can easily print reports or export to PDF, CSV, PNG, or XLS. Another option is to go to GoodData to schedule regular emails with dashboards and reports.

To print reports in a dashboard tab

1. Open Advanced Analytics.
2. Click the tab you want to print.
3. Click the **Print** icon in the upper-right.

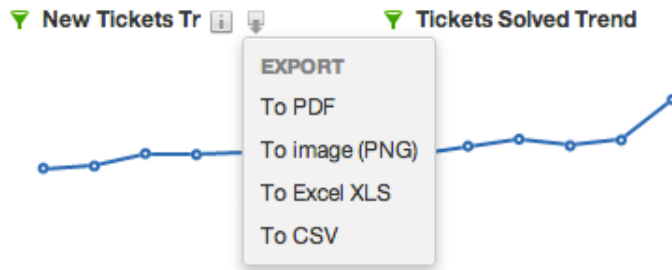


4. Save the PDF.
5. Open the PDF and print it.

To export a report

1. Open Advanced Analytics.
2. Click the dashboard tab that contains the report you want to export.
3. Hover over the report title.

- Click the Export icon that appears, then select an export option.



You can export a report to PDF, PNG (image), XLS (Excel), or CSV.

- Save your exported report.

To email dashboards and reports

- Open a project in GoodData, then click **Manage** and click the **Emailing Dashboards** tab.

Note: In Advanced Analytics you cannot email reports. You can, however, go to GoodData to schedule regular emails for reports.

The user you add to the email distribution list must be a member of your project. To invite someone to your project, see [How to invite others into your project](#).

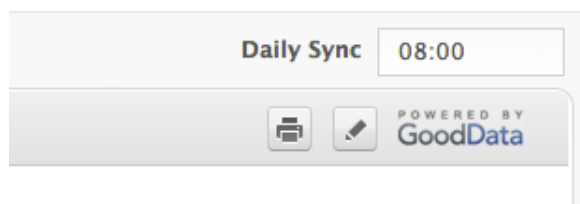
Syncing Advanced Analytics with your Zendesk (Plus only)

Your ticket data is exported daily to sync Advanced Analytics with the current state of your Zendesk. You can set the sync time that you want.

Note: Enterprise customers receive automatic hourly updates, so they do not need to set a daily sync time. Each sync begins one hour after the current sync ends. That is, a sync begins one hour after ticket data is exported and your Advanced Analytics project is updated.

To change the sync time for your ticket data export

- In Advanced Analytics, select a new **Daily Sync** time in the upper-right corner.



Your change will take effect the day after your next regularly scheduled sync. This is because sync time changes are communicated during a scheduled sync.

For example, if your sync time is 3 pm, and at 1 pm you change your sync time to 2 pm, your daily sync will happen at 3 pm that day. The next day your sync will occur at the new time, 2 pm.

Alternatively, if your sync time is 1 pm, and at 2 pm you change your sync time to 3 pm, your daily sync will happen at 1 pm the next day as previously schedule. The day after that your sync will occur at the new time, 3 pm.

Adding the Ticket Views widget (Zendesk Classic)

Your views can be displayed in a widget, which can be placed on any page in the Classic version of Zendesk. Administrators can add widgets.

To add the Views widget

1. Select the **Settings** menu, then select **Extensions**.
2. Select the **Widgets** tab.
3. Click **Add Widget**.
4. Select the **Ticket Views** widget.
5. Enter a title for the widget.
6. Select the **Display** option to make it active.
7. Set the widget availability:
 - Anyone, incl. users who are not logged in
 - Agents
 - Logged in end-users
8. You can preview the widget by selecting **Preview Widget** and clicking **Submit**.
9. When you're finished, select **Create Widget** and click **Submit**.

You can add the Views widget to many pages in the Classic version of Zendesk by selecting the **Edit widgets on this page**.

Chapter

8

Configuring 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 Zendesk*
- *Managing suspended tickets and spam*
- *Customizing your email templates*
- *Setting up to provide email-only support*

Getting started with email in Zendesk

Email is one way that end-users can submit tickets to your Zendesk and have conversations with agents to resolve their issues.

Here's how the email workflow works:

1. When an end-user sends an email to your support address, the email creates a ticket in Zendesk.
2. If an agent updates the ticket in Zendesk, a notification email is sent to the person who sent the original email.
3. If the person replies to the notification email, the reply creates a comment in the ticket.

The conversation between user and agent continues until the issue is resolved.

Your default support email address is `support@myaccount.zendesk.com`. Include it on your website and in other communications with your users. You can also use other addresses.

You have many options for controlling how your end-users interact with your Zendesk using email. This article gives an overview of some of the options and provides links to more information.

- [Using other email addresses for creating tickets](#)
- [Changing the sender information in your replies](#)
- [Adding signatures to your replies](#)
- [Changing the design of your emails](#)
- [Managing your automated emails](#)
- [Blocking incoming emails](#)
- [Managing user accounts created by email requests](#)
- [Assigning email requesters to organizations](#)

Using other email addresses for creating tickets

A default support email address is created for you when you create an account with Zendesk. The address is `support@myaccount.zendesk.com`. However, you can provide your users with alternative email addresses for submitting tickets.

This section gives an overview of the options for providing other email addresses:

- [Using variations of your Zendesk address](#)
- [Forwarding email to Zendesk from external email addresses](#)
- [Using your own email domain for incoming and outgoing email](#)
- [Importing email from your Gmail inbox](#)

Using variations of your Zendesk address

While your default support email address is `support@myaccount.zendesk.com`, the 'support' part of the address can be anything. For example, the following addresses are all equivalent:

```
support@myaccount.zendesk.com
help@myaccount.zendesk.com
sales@myaccount.zendesk.com
billing@myaccount.zendesk.com
```

You can have an unlimited number of email addresses within your Zendesk domain.

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.

Forwarding 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.

<code>support@mycompany.com</code>	>	<code>support@myaccount.zendesk.com</code>
<code>help@mycompany.com</code>	>	<code>help@myaccount.zendesk.com</code>
<code>sales@mycompany.com</code>	>	<code>sales@myaccount.zendesk.com</code>
<code>billing@mycompany.com</code>	>	<code>billing@myaccount.zendesk.com</code>

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](#).

Using 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 [Changing the sender information in your replies](#) below.

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](#).

Importing email from your Gmail inbox

You can connect your Zendesk to your Gmail inbox and automatically convert email from Gmail to tickets in your Zendesk. When enabled, your Zendesk checks for new emails in your Gmail inbox every five minutes.

For more information, [Enabling automatic ticket creation for your Gmail inbox](#).

Changing the sender information in your replies

Zendesk provides you with a number of options for changing the sender name and address displayed in email notifications to your end-users.

The sender information consists of three parts: the friendly name, the username, and the domain.



The friendly name in this example is the name of your Zendesk (set on the **Branding** tab of the **Accounts** page). The username, the word before the @ character, comes from the default reply email address (set on **Email** channel settings page). 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 sender information used in all email replies to the support requests you receive.

In addition to the three parts of the sender information, there are also three types of email addresses that are used in the exchange of email messages between end-users and your Zendesk.

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 addresses (for example, support@myaccount.zendesk.com).
Reply From	This is the sender information that end-users see as the From address in the replies they receive from your Zendesk. There are a number of options for changing what this looks like (described below). The default reply address is My Zendesk name <support@myaccount.zendesk.com>.
Reply To	This is the sender information that end-users see when they reply back to the email they received from your Zendesk. Replies back from the end-user include the ticket number, as in this example: My Zendesk name <support+id#@myaccount.zendesk.com>

Email address	Description
	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 domain (myaccount.zendesk.com) and those using an external domain (mycompany.com).

Default sender information

The default sender information is used as the Reply From address in all outgoing email unless you enable one of the other options described below. See [Changing the default reply email address](#).

Reply From address	Reply To address
My Zendesk name <support@myaccount.zendesk.com>	My Zendesk name <support +id#@myaccount.zendesk.com>
My Zendesk name <support@mycompany.com>	My Zendesk 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 your friendly Zendesk name. See [Enabling personalized email replies](#).

Reply From address	Reply To address
Claire Grenier <notifications- support@myaccount.zendesk.com>	My Zendesk name <support +id#@myaccount.zendesk.com>
Claire Grenier <notifications- support@mycompany.com>	My Zendesk 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 [Adding an agent alias](#).

Reply From Address	Reply To address
Senhora Claire <notifications- support@myaccount.zendesk.com>	My Zendesk name <support +id#@myaccount.zendesk.com>
Senhora Claire <notifications- support@mycompany.com>	My Zendesk 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 [Setting up email pass through](#).

Reply From address	Reply To address
help@mycompany.com	My Zendesk 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 Zendesk. 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.

Adding signatures to your replies

Each agent's signature can be added to ticket comments and outgoing email notifications. This is set as the default on the **Agents** settings page. 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.

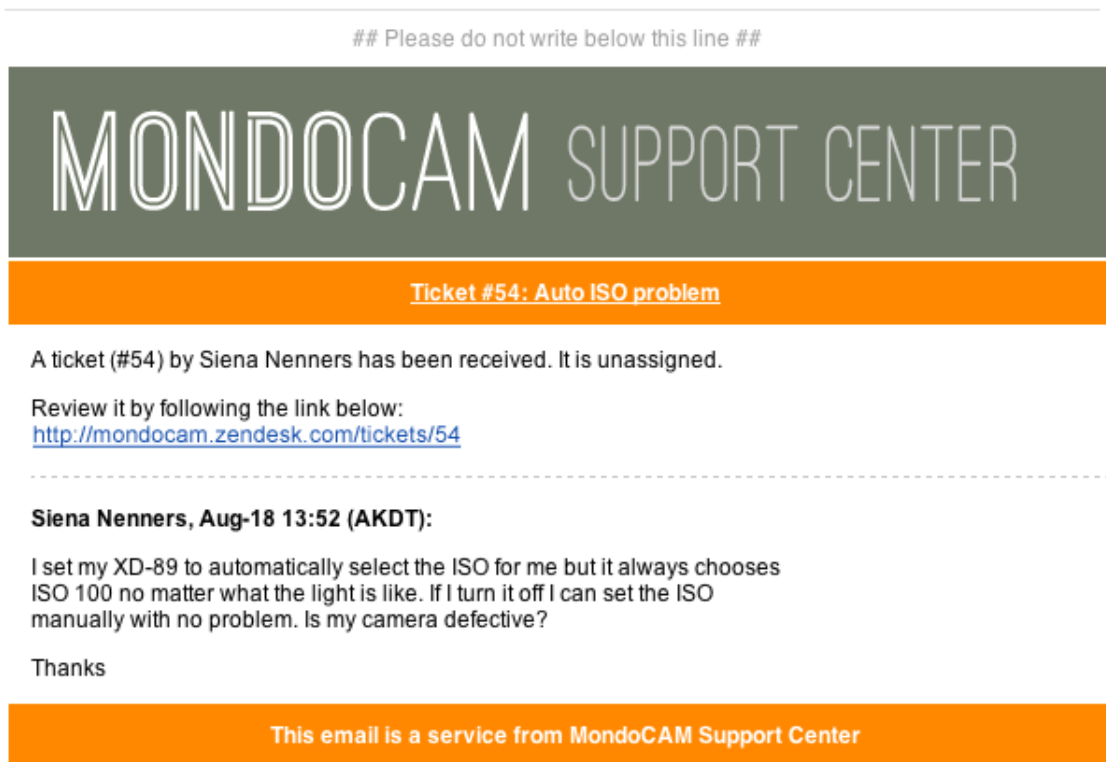
You can also create a signature template for your Zendesk if, you example, you want all agent signatures to include a standard wording and format for the company address.

For more information, see [Adding an agent signature](#).

Changing the design of your emails

You can change the look and feel of your emails by customizing the email template. You can also edit the message of your

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](#).

Managing your automated emails

You can create business rules -- triggers and automations -- that automatically send out notification emails when certain conditions are met. The system also generates email.

Changing email generated by business rules

Zendesk provides you with several business rules that generate email notifications when certain conditions are met. Zendesk has a set of default triggers, including the following:

- Notify requester of received request
- Notify requester of comment update
- Notify requester of solved request

Caution: Don't delete these rules unless you understand how Zendesk works. The email workflow in Zendesk depends on them.

Email notifications are usually generated at each stage in the workflow, such as updating the ticket, solving the ticket, and so on. Your business rules will contain many email notifications.

You can change the content of the emails, or create more rules. For more information, see the following articles:

- [Streamlining workflow with ticket updates and triggers](#)
- [Streamlining workflow with time-based events and automations](#)

Changing system-generated registration and welcome email

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 administrator on the **End-users** settings page. 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 don't require your end-users to register and log in to your Web portal, they will not receive either of these messages. See [Updating end-user settings to allow anyone to submit tickets](#).

Blocking incoming emails

Zendesk suspends or rejects certain email by default. You can also control who can use email to create tickets.

Suspended and rejected email

Zendesk uses a spam filter to prevent your Zendesk from getting cluttered with bogus tickets. Spam email is caught and may be held in the suspended tickets queue or completely rejected if there's a high probability that the email is spam.

Email may also be suspended if it doesn't meet certain acceptance criteria. The suspended tickets queue is a system-generated view that appears in your list of views. You can review the emails and accept them as legitimate tickets or reject them as spam.

For more information, see [Managing suspended tickets and spam](#) for more details.

Controlling who can use email to create tickets

If you want to prevent certain users from creating tickets with email, add their email domains or email addresses to a blacklist. Their emails are either suspended or completely rejected. If you want to allow exceptions to your blacklist, add them to a whitelist. This configuration is known as a restricted Zendesk. For more information, see [Using the whitelist and blacklist to control access to your Zendesk](#).

You can also set up a closed Zendesk where only the users that you add to your Zendesk account can submit support requests. For more information, see [Setting up a closed Zendesk](#).

Managing user accounts created by email requests

When somebody submits a request for the first time, and you have an open Zendesk, an account is created for the user and the email address is added to the account. If the same user submits another request using a different email address, a new account is created. If this happens, you can merge the new account into the old account. For more information, see the following topics:

- [Merging a user's duplicate account](#)
- [Setting up an open Zendesk](#)

A user can list more than one email address in their account. One is the primary address and is used for all email notifications. The other addresses are useful if the user sends support requests from any of one of them (either inadvertently or on purpose). The requests can be matched to the user's account.

Assigning email requesters to organizations

When somebody uses email to make a support request for the first time or otherwise registers with your Zendesk, the user can be added automatically to an organization based on their email domain. This is referred to as user mapping and an administrator can set this up by editing an organization's settings.

For more information, see [Automatically adding users to organizations based on their email domain](#).

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

Setting up email forwarding

You configure email forwarding in your email account, not in Zendesk. Exactly how this is done depends on the email provider you're using.

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.

Note: After you set up forwarding, you'll get a verification message in your ticket queue. If you can't locate the verification message ticket, check the suspended tickets view. See [Managing suspended tickets and spam](#).

Microsoft Exchange and Outlook

To forward email to Zendesk using Outlook hooked into an Exchange server, you can set up a redirect rule. To do so, follow the instructions in [Microsoft Outlook 2007: Automatically forward my messages to another e-mail account](#).

Another option is to set up email forwarding on your Exchange mailbox as follows:

1. Create a Contact in Active Directory called Zendesk Support with the email address support@yourdomain.zendesk.com.
2. Enable forwarding on support@yourcompany.com in the user properties in Active Directory.

For detailed instructions, refer to [How to configure a mailbox to forward mail to a mail-enabled contact](#). Also, check [Forwarding email--Exchange 2003](#) for steps from our own Skip Moore at Zendesk.

Community Tip! Rick Griffith forwards email directly from Active Directory/Exchange without the need to create an Exchange mailbox or configure the Outlook client to forward. He uses a Global Distribution Group. Here are his steps:

1. Create a Contact in Active Directory called Zendesk Support with the email address support@yourdomain.zendesk.com.
2. Create a Global Distribution Group with a local email address like HelpDesk@yourdomain.com and make the Zendesk Support contact a member of this new group.

With the Zendesk Support contact as a member of this group, any emails to Helpdesk@yourdomain.com (or any aliases or additional SMTP addresses that you want) are forwarded to the support@yoursubdomain.zendesk.com.

If you are using an Office365 hosted exchange instance you can forward email to Zendesk. To do so, see [Configuring Office365 Hosted Exchange with Zendesk](#) by our own Adam Panzer at Zendesk.

Community Tip! Rory says he uses hosted exchange and can't do the external contact trick in Exchange. To work around this they use a mail server on one of their web hosts that does allow 'send as' and make Outlook resend via that email account instead of their exchange server. They use an Outlook macro to simplify things. To use this approach, first create that mail account on another server (customers will see this email address if they're CC'd on a new ticket that you resend, so name it sensibly), then follow the steps in [Forwarding email with hosted exchange using Outlook macro](#).

Google Gmail

If you are using Google Gmail, use the steps in [Forward email to another account](#) to forward email to Zendesk.

Note: When you set up forwarding in Gmail, the email you receive that contains your verification code will be added to your Suspended Tickets view. You can retrieve the message and the verification code from there.

Community Tip! Alexandr Dyba says Gmail (@ Google Apps) filter forwarding puts Zendesk on steroids! He's using one dedicated address (and its aliases) to sort and route different requests. He says it's relatively easy to create and maintain a business logic to automate all possible uses of Zendesk in the company. All requests can be handled by Gmail filters in one simple account and by creating a "Ticket was received at" trigger in your Zendesk.

Other email providers

Here's information for setting up email forwarding with a few other email providers:

- [Yahoo Mail](#)
- [Fastmail](#)
- [Lotus Notes/Lotus Domino](#)

Locating your 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 and spam](#).

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 four steps (three of which are 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 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](#).

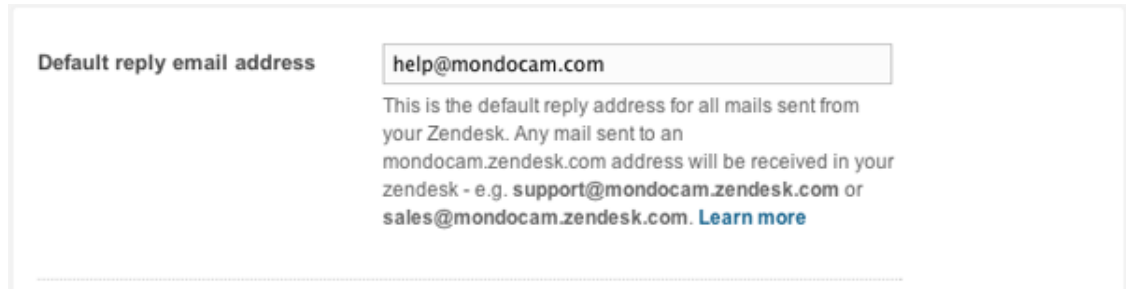
Update the default reply email address in Zendesk

The final step is to set the default reply email address to your external email address.

To change the default email address

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Email > Edit**.

2. Replace the default reply email address with your external email address.



The screenshot shows a configuration panel for the 'Default reply email address'. The label 'Default reply email address' is on the left. To its right is a text input field containing 'help@mondocam.com'. Below the input field is a paragraph of explanatory text: '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](#)'.

3. Click **Save**.

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:

- [Enabling personalized email replies](#)
- [Adding an agent alias](#)
- [Setting up 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 Zendesk.

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 Zendesk name <support@myaccount.zendesk.com>
help@myaccount.zendesk.com	My Zendesk name <support@myaccount.zendesk.com>
sales@myaccount.zendesk.com	My Zendesk name <support@myaccount.zendesk.com>
billing@myaccount.zendesk.com	My Zendesk 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 Zendesk name <support@myaccount.zendesk.com>
help@mycompany.com	My Zendesk name <support@myaccount.zendesk.com>
sales@mycompany.com	My Zendesk name <support@myaccount.zendesk.com>
billing@mycompany.com	My Zendesk 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 Zendesk name <support@mycompany.com>
help@mycompany.com	My Zendesk name <support@mycompany.com>

Sent To	Reply From
sales@mycompany.com	My Zendesk name <support@mycompany.com>
billing@mycompany.com	My Zendesk 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 aliases.

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 change the username in the email channel settings.

Default reply email address

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](#)

To change the email username

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Settings** menu, then select **Channels > Email > Edit**.
2. Replace the username (the word before @).
3. Click **Save**.

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. This includes the default reply email address, personalized email replies, and agent aliases. For more information on these settings, see:

- [Changing the default reply email address](#)
- [Enabling personalized email replies](#)
- [Adding an agent alias](#)

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 Zendesk name <support@mycompany.com>
billing@mycompany.com	My Zendesk name <support@mycompany.com>

To enable email pass through

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Email > Edit**.
2. Select **Email pass through address > Enable**.
3. Click **Save**.

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 your Zendesk account 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>
```

Your Zendesk account name and default reply email (see [Changing the 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 aliases (see [Adding an agent alias](#)).

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 Zendesk name <support+id#@myaccount.zendesk.com>
help@mycompany.com	My Zendesk name <support@mycompany.com>
sales@myaccount.zendesk.com	My Zendesk name <support+id#@myaccount.zendesk.com>
billing@mycompany.com	My Zendesk 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. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Email > Edit**.
2. Select the **Personalized Email Replies > Enabled** option.
3. Click **Save**.

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 Zendesk

You can control access to your Zendesk based on your end-users' email addresses; either accepting or rejecting their attempts to register as a user in your Zendesk 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.

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

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 Zendesk.

If you've configured your Zendesk to accept support requests from anyone, 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.

To edit your whitelist and blacklist settings

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Customers**.
Zendesk Classic: Select the **Settings** menu, then select **End-users**.
2. Enter your whitelist and blacklist settings (see examples below).
3. Click **Save tab**.

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, you can use the following two keywords to build your rules:

- `suspend` - The `suspend` keyword explicitly declares that a specific domain or email address will be sent to the suspended tickets queue. This is identical to blacklisting the domain or email address without a keyword.
- `reject` - The `reject` keyword completely rejects the email, which means that it's not added to the suspended tickets queue.

All three 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 Zendesk 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](#) in the Zendesk Agent Guide.

Managing suspended tickets and spam

Email sent to your Zendesk can be suspended or rejected. Suspended email is not necessarily spam. This article explains the other reasons tickets can be suspended and what to do about them.

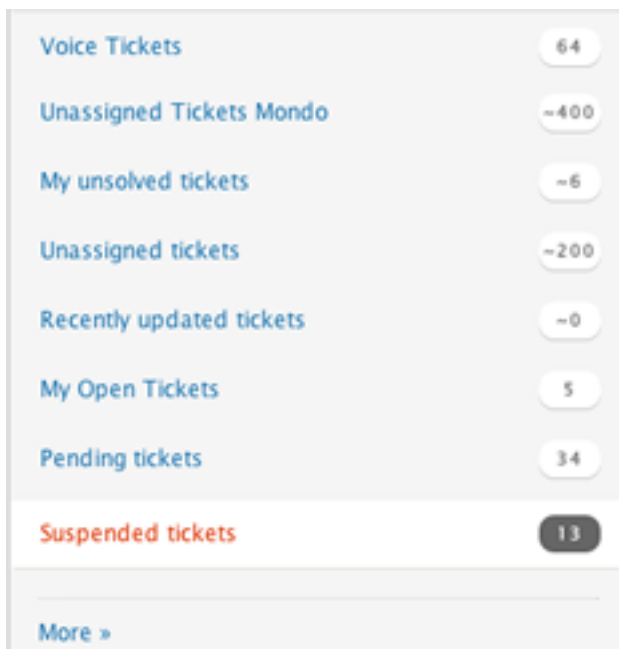
Topics covered:

- [What are suspended tickets?](#)
- [What causes emails to be suspended?](#)
- [Guidelines for reviewing suspended tickets](#)
- [Reducing suspended spam](#)
- [Using the whitelist to prevent suspensions](#)
- [Setting up suspended ticket notifications](#)
- [Cause of suspension descriptions](#)

What are suspended tickets?

When an end-user submits a support request by email, in most cases the email becomes a new ticket or adds a comment to an existing ticket. In certain cases though, the email is suspended. Suspending an email means putting it aside for further review. It's not necessarily spam. It's just not a ticket in your Zendesk yet. It remains in limbo until somebody reviews it and decides whether to accept or reject it. If nobody reviews it, the email is deleted after 14 days.

Suspended emails are displayed in a system-generated view. Click the **Views** (☰) icon in the sidebar and then click the **Suspended Tickets** view. (In Zendesk Classic, the view won't be listed if you don't have any suspended tickets.)



An email can be suspended for several reasons, some for intentional policy reasons. A common reason is that the email is from an unregistered user when you require users to register. Example:

Suspended tickets (1)				
<input type="checkbox"/>	ID	SUBJECT	RECEIVED	CAUSE OF SUSPENSION
<input type="checkbox"/>	#160410917	Leaking radiator	1 minute ago	User must sign up to submit email, user notified

For more information, see [What causes tickets to be suspended?](#) below.

We recommend implementing a process for reviewing suspended emails. See [Guidelines for reviewing suspended tickets](#) below.

Instead of being suspended, an email can be rejected outright. A rejected email is not kept for further review and it can't be recovered. Email is rejected for the following two reasons:

- The email is spam. If the email is rated as having a 99% or better chance of being spam, it's rejected. If the rating is less than a 99%, the email is suspended to give you a chance to confirm that it's really spam.
- You blacklisted the email address or domain. See [Using the whitelist and blacklist to control access to your Zendesk](#).

What causes emails to be suspended?

Emails are suspended for two basic reasons:

- the sender is not allowed to create or update a ticket
- the sender is not a person

The sender is not allowed to create or update tickets

An email can be suspended if you require users to register before submitting their first ticket, or if you have a closed or restricted Zendesk that limits who can submit tickets.

- In an *open* Zendesk requiring users to register, anybody can submit tickets as long as they register first. After submitting a first ticket, the ticket is suspended and a welcome email is sent to the new user requiring them to register before the ticket can be submitted. After the user verifies their email address and creates a password, the ticket is unsuspended.
- In a *closed* Zendesk, only designated users can create or update tickets. An administrator designates who can submit tickets. If an unknown person tries to submit a ticket, the email is suspended.
- In a *restricted* Zendesk, only users with email addresses in certain domains can register and submit tickets. Emails in other domains are either suspended or completely rejected, depending on your setup.

A sender can also be prevented from updating a ticket if the email token identifying the ticket is stripped from the reply email. For more information, see [Understanding the email token](#) in the agent's guide.

Even if the user is known or registered and their email is verified, the email could still be suspended in the following cases:

- the user forwards an email notification to an unverified email account and then tries to reply from that account
- the user forwards an email notification to an unregistered person, who then tries to reply to the email
- the user submits a ticket using the web form while logged out of Zendesk. The ticket is suspended and a verification email is sent. The ticket is unsuspended when the user clicks the verification link in the email.

The sender is not a person

Emails are suspended if your Zendesk detects they're not from real users. Examples:

- suspected spam
- automated response emails
- emails from system users such as mail-daemon@ or postmaster@
- emails with a 'no-reply' address

See [Cause of suspension descriptions](#) below for more information.

Guidelines for reviewing suspended tickets

Review your queue of suspended tickets on a regular basis. Follow review guidelines like the ones suggested below. The guidelines vary depending on how your Zendesk is set up.

You can review suspended emails one-by-one or in bulk. The choice depends on your policy and the volume of suspended emails to be recovered or deleted. When reviewing emails in bulk, recovering them creates a batch of tickets. When reviewing emails one by one, you have the option of recovering each email automatically or manually. The automatic recovery option creates the ticket immediately. The manual recovery option lets you edit the ticket properties before it's created. For step-by-step instructions, see [Viewing, recovering, and deleting suspended tickets](#) in the agent's guide.

Review guidelines for an open Zendesk

In your Zendesk, anybody can submit tickets. You may or may not require them to register first. If they have to register, the first ticket is suspended while a welcome email is sent to the new user requiring them to register before the ticket can be submitted.

Guidelines if you don't require users to register

1. Recover emails that should be tickets. In particular, look for the following cases:
 - ticket notification replies with the email token stripped out (cause of suspension in the **Suspended Tickets** view: "Permission denied due to unauthenticated email update")
 - spam emails that aren't spam (cause of suspension: "Detected as spam")
2. Bulk delete any remaining emails.

Guidelines if you require users to register

1. Recover tickets from users who haven't registered yet. Recovering the ticket also registers the user. To identify the emails, look for the following cause of suspension in the **Suspended Tickets** view: "User must sign up to submit email, user notified." Note that the user's email remains unverified until the user responds to the welcome email sent to them.
2. Recover other emails that should be tickets. In particular, look for the following cases:
 - tickets that registered users submitted through the web form while logged out (cause of suspension: "Submitted by registered user while logged out")
 - ticket notification replies by registered users from unverified addresses (cause of suspension: "Submitted by unverified user")
 - ticket notification replies by registered users with the email token stripped out (cause of suspension: "Permission denied due to unauthenticated email update")
 - spam emails that aren't spam (cause of suspension: "Detected as spam")
3. Bulk delete any remaining emails.

Review guidelines for a closed or restricted Zendesk

In your Zendesk, only designated persons can submit tickets directly. You may have a suspended ticket workflow in place to let anonymous users submit tickets indirectly. When a support request from an anonymous user is received and suspended, an agent reviews the email and either recovers or deletes it.

Guidelines

1. If you accept tickets from anonymous users, review and recover them one by one, either manually or automatically. To identify them, look for the following causes of suspension in the **Suspended Tickets** view: "Permission denied for unknown email submitter" for a closed Zendesk or "Sender domain not in the whitelist" for a restricted Zendesk.
2. If you have a restricted Zendesk and require approved users to register, recover tickets from approved users who haven't registered yet. Recovering the ticket also registers the user. To identify the emails, look for the following cause of suspension: "User must sign up to submit email, user notified." Note that the user's email remains unverified until the user responds to the welcome email sent to them.
3. Recover other emails that should be tickets. In particular, look for the following cases:
 - tickets that registered users submitted through the web form while logged out (cause of suspension: "Submitted by registered user while logged out")
 - ticket notification replies by registered users from unverified addresses (cause of suspension: "Submitted by unverified user")
 - ticket notification replies by registered users with the email token stripped out (cause of suspension: "Permission denied due to unauthenticated email update")
 - spam emails that aren't spam (cause of suspension: "Detected as spam")
4. Bulk delete the remaining emails.

Reducing suspended spam

Zendesk uses spam detection software to rate incoming email. If the email is rated as having a 99% or greater chance of being spam, it's rejected and you never see it. If it's rated as having less than a 99% chance of being spam, the email is added to your suspended tickets to give you a chance to confirm that it's really spam.

If you find that you're receiving more spam emails than you'd like in your suspended tickets queue, you can use the blacklist to reject specific email addresses and domains. See [Using the whitelist and blacklist to control access to your Zendesk](#).

Note: The option to blacklist email is not available in a closed Zendesk where administrators designate who can submit tickets.

Using the whitelist to prevent suspensions

Using the whitelist only prevents one cause of suspension ("Sender domain not on whitelist") but not the others. The whitelist is used in conjunction with the blacklist to restrict access to your Zendesk. Emails submitted by end-users on the blacklist are suspended or rejected. The whitelist specifies who is exempt from the blacklist rules, not from the email suspension rules.

For example, an email from a white-listed user can still be suspended because the user hasn't registered yet (cause of suspension: "User must sign up to submit email, user notified").

For more information, see [Using the whitelist and blacklist to control access to your Zendesk](#).

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.

In the **Suspended Ticket Notifications** section of the **Tickets** settings page, you can select the frequency and enter the email addresses that you want the notifications to be sent to.

Suspended Ticket Notifications

How often you want Zendesk to email you about new suspended tickets.

Email list

langston@mondocameras.com susan@mondocameras.com

List of email addresses that should receive updates on suspended ticket status. Separate multiple email addresses by space.

To set up suspended ticket notifications

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Setting** menu, then select **Tickets**.
2. 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.
3. Enter the email addresses you want the notifications sent to.
4. Click **Save tab**.

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.

Cause of suspension descriptions

The **Suspended Tickets** view displays messages describing the cause of suspension for each suspended email. Example:

Suspended tickets (1)				
<input type="checkbox"/>	ID	SUBJECT	RECEIVED	CAUSE OF SUSPENSION
<input type="checkbox"/>	#160410917	Leaking radiator	1 minute ago	User must sign up to submit email, user notified

The following table lists the possible descriptions in the view and what each one means.

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 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 your Zendesk. 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 email token identifying the ticket. This can happen if an email client strips out email header information. See Understanding the email token .
Permission denied for unknown email submitter	When you require your 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 registered user while logged out	If a registered user submits a ticket using the Submit a Request form while they are not logged in, the ticket will be suspended and a verification email will be sent to them. When the user

Cause of suspension	Description
Submitted by unverified user	clicks the verification link in the email the ticket will be unsuspended. This indicates that the user is known in your Zendesk 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.

Customizing your email templates

All the email notifications sent from your Zendesk are formatted for both HTML and plain text emails. Both formats are included in each email. The 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 in the text versions of your emails.

The look and feel of the emails are controlled by an HTML template and a text template.

To edit the email templates

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Email > Edit**.
2. Modify the email templates.
If you need help, see the following topics:
 - [Editing the HTML template](#)
 - [Editing the text template](#)
3. If you want to start over with the unmodified version of the template, click the Revert to Default link below the template.
4. Click **Save**.

In addition to customizing the email templates, you can change emails as follows:

- [Show user profile photos](#)
- [Add or remove ticket links](#)
- [Edit the delimiter text](#)
- [Use Liquid markup](#)

Tip: If you have the Plus or Enterprise plan, you can modify and test email changes in a sandbox before deploying them publicly. See [Testing changes in your sandbox](#).

Editing the HTML template

You can change the appearance of HTML emails by editing the HTML and CSS in the HTML template.

This section covers the following topics:

- [Changing the appearance of HTML emails](#)
- [Guidelines for customizing HTML emails](#)
- [Editing the old HTML template](#)
- [Switching to the new HTML template](#)

Note: If you signed up to Zendesk **before July 12th, 2012**, you have a different HTML template. See [Editing the old HTML template](#) for instructions. If you want to upgrade to the new template, see [Switching to the new HTML template](#).

Changing the appearance of HTML emails

The HTML template consists of DIV tags and system placeholders.

The placeholders supply most of the content to the email. The `{{delimiter}}` and `{{content}}` placeholders are required and should not be deleted. The `{{footer}}` placeholder is optional. No

other placeholder can be used in the template. For more information, see [Understanding the system placeholders](#).

The DIV tags apply CSS styles to the content. By adding or modifying CSS styles, you can change the look and feel of the email as a whole, the delimiter, or the footer. To edit the styles, open the **Email** channel settings page and scroll down to **Email Templates**. Make sure to click **Save** when you're done.

Here's the relevant code in the template (reformatted slightly for clarity):

```
<div style="padding: 10px;
    line-height: 18px;
    font-family: 'Lucida Grande', Verdana, Arial, sans-serif;
    font-size: 12px;
    color: #444444;" >

    <div style="color: #b5b5b5;">
      {{delimiter}}
    </div>

    {{content}}

    <div style="color: #aaaaaa;
      margin: 10px 0 14px 0;
      padding-top: 10px;
      border-top: 1px solid #eeeeee;" >
      {{footer}}. Delivered by <a href="http://www.zendesk.com" style="color:black"
      target="_new">Zendesk</a>.
    </div>
</div>
```

For example, here's how to change the font color of the footer to teal:

```
...
<div style=" color: #009966;
    margin: 10px 0 14px 0;
    padding-top: 10px;
    border-top: 1px solid #eeeeee;" >
    {{footer}}. Delivered by <a href="http://www.zendesk.com" style="color:black"
    target="_new">Zendesk</a>.
  </div>
...
```

The font color is set to teal's hexadecimal value with the following style declaration:

```
color: #009966;
```

Note: The color of links can't be customized. Links are styled with CSS pseudo classes such as `:hover`. Example: `a: hover {color: #FF00FF;}`. Unfortunately, CSS pseudo classes are not supported in inline CSS, and major email clients like Gmail strip out any CSS that is not inline.

To add an image such as a company logo to the template, insert an `IMG` tag that references the image. Example:

```

```

Note: Before adding logos and other images, remember that most email clients don't display images by default.

If you want to add a hyperlink to the logo, enclose the `IMG` tag in an anchor tag, as in this example:

```
<a href="http://YOURACCOUNT.zendesk.com"></a>
```

For more information, see the following resources:

- the [CSS portal](#) on the Mozilla Developer Network
- .

Guidelines for customizing HTML emails

You can customize the HTML template extensively. However, keep in mind that designing HTML emails is hard because of the way HTML and CSS are rendered in different web browsers and email clients. Certain types of formatting can even be interpreted as spam. In general, keep your customization as simple as possible and follow these guidelines:

- Do not use CSS3 style declarations. Stick to CSS1 or 2.
- Do not add more DIV sections.
- Do not use `<style>...</style>` to apply styles. Most email clients strip out the tag.
- Keep text formatting to a minimum. Lots of bold text can trigger spam filters.
- HTML5 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. The tag displays a description of the image before users allow the images to be displayed.
- 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 old HTML template

If you signed up to Zendesk **before July 12th, 2012**, you have a different HTML email template. Refer to this section to customize it. If you want to upgrade to the new template, see [Switching to the new HTML template](#).

The older version of the template consists of the email text delimiter, a header, the content area, and the footer. All of them are contained within an HTML table.

The template also includes system placeholders that insert the delimiter, header, footer, and ticket content. The `{{delimiter}}` and `{{content}}` placeholders are required. The `{{header}}` and `{{footer}}` placeholders are optional. See [Understanding the system placeholders](#).

You can make minor changes to the HTML to make simple branding changes. For example, here's how to set the background and font colors of the header and footer (relevant code in bold):

```
<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">
    {{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;
```

For a great example of a customized email template complete with sample files, check out [Ben Lucier's](#) post [A better email template for Zendesk](#) in our Community forums.

Switching to the new HTML template

If you signed up to Zendesk **before July 12th, 2012**, you have an older version of the HTML email template. To learn about the new version, see [Introducing an all new email notification template](#) by Jake Holman.

You can upgrade to the new version as follows.

1. Click the **Manage** icon () in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Email > Edit**.
2. Scroll down to the **Email Templates** section.
3. If you customized the existing legacy template, you may want to paste the markup in a separate file as a backup.
4. Select the **Enable modern template** option.
The markup for the new template replaces the old markup.
5. Click **Save** to start using the new template with your emails, or customize it first. See [Changing the appearance of HTML emails](#).

Editing the text template

The text template is used when the user elects not to read email messages in HTML format. To edit the text template, open the **Email** channel settings page and scroll down to **Email Templates**. Make sure to click **Save** when you're done.

The text email template consists of two system placeholders:

```
{{content}}
{{footer}}
```

The `{{content}}` placeholder inserts the text delimiter, the ticket title, the text that is generated from business rules (triggers, automations, or macros), and the ticket comments. The `{{footer}}` placeholder is optional. You can remove it if you want. For more information, see [Understanding the system placeholders](#).

Note: The `{{delimiter}}` placeholder is not required in the text template. The `{{content}}` placeholder contains the delimiter text.

If you'd like to add a line to your emails, simply add it to the template.

```
Thanks for contacting MondoCam Support!
{{content}}
{{footer}}
```

Showing user profile photos in HTML emails

To show user profile photos next to ticket comments in HTML emails, select the **Show User Profile Photos in Emails** option on the Channels/Email page.

Be aware of the costs and benefits of displaying profile photos. On the positive side, pictures lead to a more personal experience for your customers. On the negative side, most email clients don't display images by default.

The emails display the photos from Zendesk account profiles or from [Gravatar](#). If you want to display your company logo next to ticket comments, upload it to Zendesk as your profile photo. Make sure the image size ratio is 1:1. The recommended size is 200x200px.

Note: The various rendering engines used by mail clients and web browsers may affect the quality of the images.

Adding or removing ticket links in emails


Your email notifications can provide a link back to the ticket being discussed. Example:

This ticket ([#321830](#)) has been assigned to group 'Documentation', of which you are a member.

 ticket link

This type of link is defined in a trigger or automation, not in the template. For example, most of the default triggers have an action that sends an email notification with a link to a ticket. If you provide support with email only, you don't want customers to see a link to a ticket that would prompt them to log in. In this case, you must edit your triggers or any other business rules that generate email notifications.

To add or remove a ticket link in a notification trigger or automation

1. Click the **Manage** icon () in the sidebar, then select **Triggers** or **Automations**.
2. Locate the notification trigger or automation and select **Edit**.
3. Modify the action or actions as needed.

The following placeholders insert ticket links in the email body: `{{ticket.url}}` or `{{ticket.id}}`.

4. Click **Update**.

For more information on editing triggers to remove ticket links, see [Removing placeholders that contain URLs from your notification triggers](#).

If you provide support through email only, see [Setting up to provide email-only support](#). The article describes how to remove links back to your Web portal that would prompt your end-users to attempt to log in.

Editing the delimiter text and supporting other languages

The text in the email delimiter is used to inform the email recipient that any text entered into a reply must be above a certain line in the email.

##- Please type your reply above this line -## ← delimiter

This ticket ([#321830](#)) has been assigned to group 'Documentation', of which you are a member.



Aaron P. (Zendesk Support)

Jan 08 14:07 (PST)

Hi Docs,

When the recipient's reply is received in Zendesk, the delimiter is used to separate old content from new. The new content is added to the ticket as a comment. Without the delimiter, each ticket comment would contain the entire content of the email.

You can change the delimiter text. The setting is located on the same **Email** channel settings page as the email template, under Mail Delimiter. The text must be between 20 to 65 characters long.

If you support multiple languages in your Zendesk, replace the delimiter text with the `{{txt.email.delimiter}}` placeholder.

Mail 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 supported in Zendesk. The language 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. 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 a Zendesk set up for email-only support (see [Setting up to provide email-only support](#)), the delimiter is displayed in your primary (default) language.

Using Liquid markup

Liquid markup does not work in the email templates. It only works in the business rules (triggers, automations) that generate the email notifications.

If you want to use Liquid markup to have more control over the content of email notifications, see [Using Liquid markup to customize comments and email notifications](#).

Understanding the system placeholders

Most of the content in notification emails is generated dynamically by the Zendesk system. The dynamically generated content is represented by placeholders in the email templates. The placeholders are enclosed in double curly quotes, such as `{{footer}}`.

The placeholders insert delimiter text, the email contents, and a footer.

`{{delimiter}}`

Displays the line "##- Please type your reply above this line -##". The delimiter is used by the system to separate old content from new. When a person replies to an email, the new content in the reply is added to the ticket as a comment. This placeholder is required in the HTML template. For more information, see [Editing the text in the mail delimiter and supporting other languages](#).

`{{content}}`

Displays the email content, which can include ticket comments and user profile photos. The content is defined in the trigger, automation, or anything else that sends email from your account. See [Streamlining workflow with ticket updates and triggers](#).

`{{footer}}`

Optional. Displays the line "This email is a service from *YourZendeskName*." It also displays ticket properties, such as status and requester, in emails sent to agents. The properties are not displayed in emails sent to end-users. The list of properties can't be customized at this time.

Setting up to provide email-only support

Many Zendesk accounts prefer to not require their end-users to sign 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 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 Web portal is that they track their requests in email.

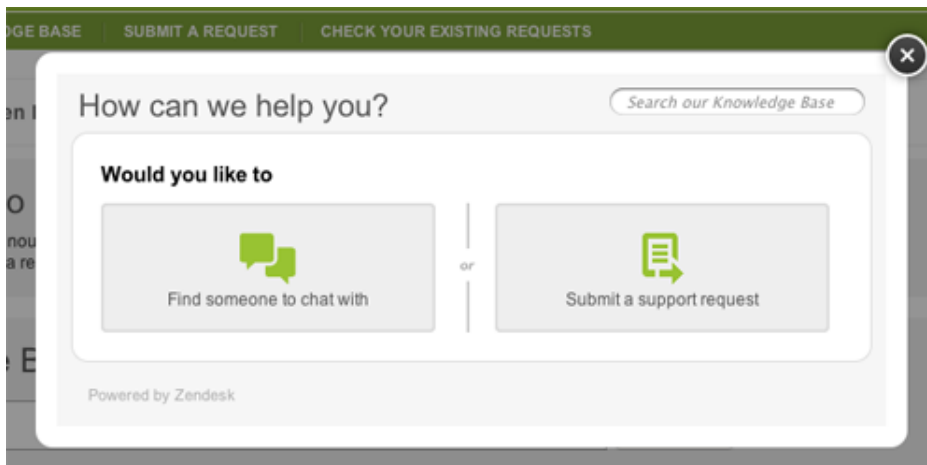
Your end-users request support and interact with your Zendesk and agents (without signing in) by using the following channels:

- Sending email directly to your support email address (for example, `support@mycompany.zendesk.com`)
- Submitting a support request using the Zendesk Feedback Tab
- 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 sign 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 sign 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 Feedback Tab with knowledge base search enabled

The advantage of using the Zendesk Feedback Tab 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 Feedback Tab to your Zendesk 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 sign in, sign up, get a password, and submit requests (see [Hiding end-user access links in the Web portal](#)).

Setting up your Zendesk to provide support without also requiring end-users to sign in involves the following:

- Allowing anyone to submit requests and hiding the requirement to sign in
- Modifying the email notification template to remove all URLs to your Zendesk
- Modifying triggers to remove all URLs to your Zendesk
- Adding a CSS and a JavaScript widget to hide links to register, sign in, and submit requests

Updating end-user settings to allow anyone to submit tickets

To allow requests without requiring end-users to sign in to your Web portal, you need to modify your end-user settings. Only administrators can make the following changes to the end-user settings.

To modify account settings to provide email-only support

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Customers**.
Zendesk Classic: Select the **Settings** menu, then select **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 verification email when a new user is created by an agent or administrator** option.

5. Click **Save Changes**.

When an unregistered end-user submits a request for the first time, they are added to your Zendesk as a new end-user. They receive the request confirmation email but not the verification request email. They remain unverified in your Zendesk.

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 sign in to do either of these things. Both are still relevant to your administrators and agents.

Allowing ticket attachments

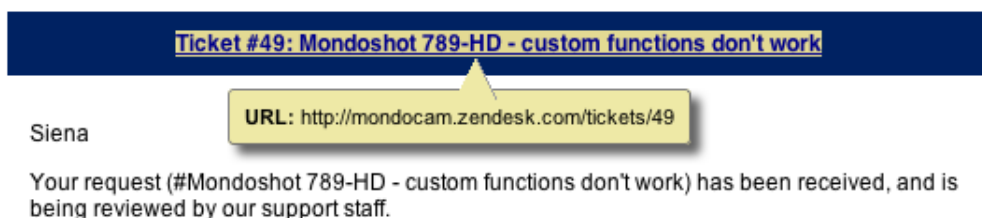
You'll probably want to also allow your end-users to add attachments to their email requests. If you don't currently have this enabled, you can do so by updating the **Tickets** settings page. Attachments can be either public or private. However, adding private attachments requires end-users to sign in to your Zendesk. So, the only option you have for attachments when providing email-only support is to allow public attachments.

To allow public attachments in incoming email support requests

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Tickets**.
Zendesk Classic: Select the **Settings** menu, then select **Tickets**.
2. In the **Attachments** section, click the **Customers can attach files** setting.
3. Click **Save tab**.

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. If you signed up to Zendesk **before July 12th, 2012**, your default template contains a header element that has a link back to your Zendesk, so you'll want to remove it. Here's what the header looks like to the end-user:



Note: If you signed up **on or after July 12, 2012**, you can skip this section. You have a different HTML template than doesn't have a link to the ticket in Zendesk.

Only administrators can make changes to the email template.

To remove the header from the email HTML template

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Settings** menu, then select **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 placeholders that contain URLs from your 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 be 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 Zendesk. Only administrators can edit the triggers.

To remove URLs from email notification triggers

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.

Zendesk Classic: Select the **Manage** menu, then select **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 your Zendesk; 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 Zendesk. Widgets can only be added by an administrator.

To add the CSS widget

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
 - Zendesk Classic:** Select the **Settings** menu, then select **Extensions**.
2. Select the **Widget** tab and then click **Add widget**.
3. Select the **Global CSS** widget.
4. Enter a widget title, for example: *Hide end-user access links*.
5. Set the widget's availability to **People who are not agents**.
6. 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;}
```

7. Click **Submit**.

The CSS widget removes all the elements of the user interface that provide access for end-users to log in to your Zendesk.

Note: This also means that your agents, like your end-users, will not see a login link for your Zendesk. To access the login page, your agents need to use the following URL: `mycompany.zendesk.com/access`. This is the login page.

Chapter

9

Web portal, forums, and knowledge base

- *How to brand your Zendesk web portal*
- *Changing the address of your web portal (host mapping)*
- *Setting up and managing forums*
- *Creating and managing your forums content*
- *Pinning forum topics to your web portal*
- *Managing your mobile web portal*
- *Analyzing forum activity (Plus and Enterprise)*
- *Analyzing knowledge base search activity (Plus and Enterprise)*
- *Optimizing your knowledge base search results*
- *Best practices for finding customer issues to start your knowledge base*
- *Best practices for driving traffic to your forums and knowledge base*

How to brand your Zendesk web portal

Zendesk provides both simple and quick branding and options for more extensively branding your Zendesk web portal. Simple and quick is done via admin settings to change the header and page background colors, the logo, and the name of your Zendesk. Beyond that, you need to create custom CSS (cascading style sheets) code and possibly JavaScript to skin your web portal to meet your branding needs (make it look like your company web site, for example).

Simple branding: Changing your Zendesk name, header logo, and colors

You can quickly change your Zendesk name as it appears to your end-users, add your own logo to the header, and change the default colors. These changes affect both your web portal and mobile web portal.

Note: In the new version of Zendesk, these changes only affect the customer-facing web portal, not the agent interface. In the Classic version of Zendesk, these changes affect both interfaces.

To make simple branding changes to your Zendesk

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Click the **Branding** tab.
3. To change the name of your Zendesk, enter a new name in **Your Zendesk account name**.
4. In the **Header logo** section, click **Change**, then click the **Browse** button that appears.

Header Logo



[Change](#) | [Delete](#)

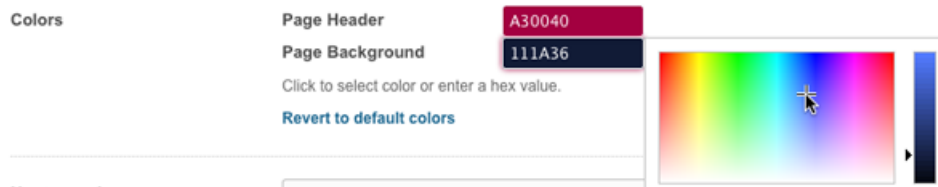
Upload a new logo, or delete the existing logo

Website URL

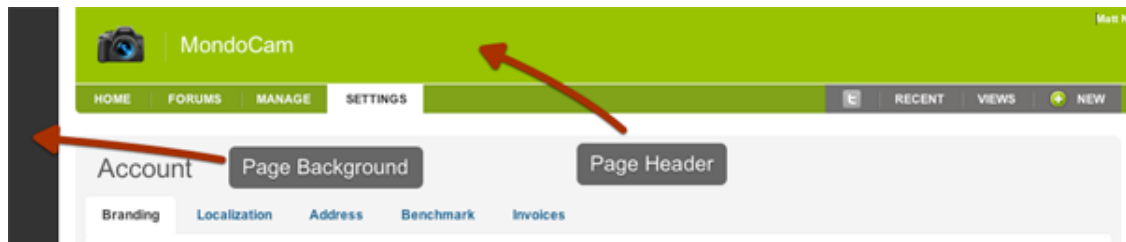
Clicking on the logo will take users to this URL.

Your logo should be 254 pixels wide by 50 pixels tall. Zendesk will scale the image to fit that space if it's not already that size.

5. Select your image.
6. If you'd like the logo to link back to your company web site, enter the URL in **Website URL**.
7. To change the page header color, click the color bar beside the **Page header** label.
8. In the color picker, select a color or enter the hex number for the color, then click off the color picker to close it.



The **Page Header** is the color at the top and the **Page background** is the color on the sides.



9. To change the page background color, click the color bar beside the **Page background** label and select a color or enter the hex number for the color.

10. When you're done, click **Save tab**.

In addition, you can also add a custom favicon (the icon appears in the Web browser address bar and in the mobile version of your Zendesk).

On this settings page, you'll also see the **Host mapping**, **Subdomain**, and **Mobile branding** settings. These are described in the following topics:

- [Changing the address of your web portal \(host mapping\)](#)
- [Renaming your subdomain](#)
- [Managing your mobile web portal](#)

Custom branding with CSS and JavaScript

If you want your Zendesk web portal 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. You can modify your Zendesk using CSS widgets, which can be added by an administrator.

Important: If you're using the new version of Zendesk, you cannot customize the agent interface using CSS. It is currently not supported. You can however use CSS to customize your customer-facing web portal.

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 [Zendesk 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 Zendesk 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 Zendesk, you need to add a Global CSS widget. Only administrators can add widgets.

To add a CSS widget

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Extensions > Add widget**.

Zendesk Classic: Select the **Settings** menu, then select **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 user interface 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 your Zendesk. 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

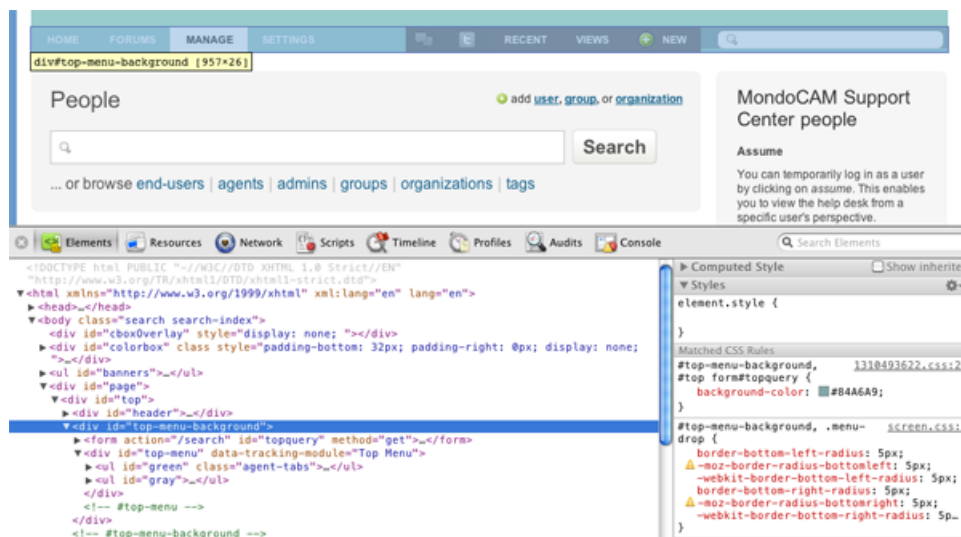
use a combination of JavaScript and CSS. Adding a JavaScript widget is similar to adding a CSS widget. Just follow the steps above to add a widget and select **Global JavaScript**.

Inspecting Zendesk page elements

The examples in the topics contained in the *Zendesk 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 your Zendesk web portal 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 Zendesk and try out some of the code to get started.

Also, if you're interested in how we customized our own web portal home page (<https://support.zendesk.com/home>), see *Custom skinning your web portal*.

Changing the address of your web portal (host mapping)

By default, the address of your Zendesk web portal is a Zendesk subdomain such as mycompany.zendesk.com. However, you can change the address to a subdomain of your own website, such as support.mycompany.com. In Zendesk, this feature is called host mapping.

For example, suppose your company is called Mondo Cameras and the URL of your main website is mondocam.com. After signing up to Zendesk, the initial address of your Zendesk web portal might be something like mondocam.zendesk.com. You can change the portal's address to a subdomain of your company's website like support.mondocam.com.

The workflow for changing the address consists of the following steps:

1. *Get a domain name and a subdomain* (if not already done)
2. *Make the subdomain an alias of your Zendesk web portal*
3. *Map the subdomain to Zendesk*
4. *Select a SSL option*

Tip: Because of potentially long lead times, consider your SSL options early in the process.

The host mapping feature is supported by the Regular, Plus, and Enterprise plans.

Getting a domain name and a subdomain

If not already done, you must register a domain name and add a support-related subdomain to it.

Note: Working with domain names and subdomains can be confusing because it's something most of us rarely do. Consult your system administrator, if you have one, before proceeding.

1. Purchase and register a domain name with a domain registrar.

You can purchase and register a domain name from any domain registrar, including GoDaddy, Yahoo! Domains, 1&1, Netregistry, or Register.com. For instructions, see the Help on the registrar's website. For more information, see [How to Register Your Own Domain Name](#) by Christopher Heng on thesitewizard.com.

For example, if your company is called Mondo Cameras, you might register a domain name called mondocam.com.

2. After registering a domain name, use the registrar's tools to add a subdomain for your support portal.

See the Help on the registrar's website for instructions on adding a subdomain. You can call the subdomain "support" or something similar. Example: support.mondocam.com.

Making the subdomain an alias of your Zendesk portal

The next step is to make your subdomain an alias of your Zendesk portal. An alias is simply an alternate address for a website. For example, you can make the addresses "support.mondocam.com" and "mondocam.zendesk.com" interchangeable as far as web browsers are concerned.

Consult your system administrator, if you have one, before proceeding.

To make your subdomain an alias of your Zendesk web portal:

1. Log in to your domain registrar's control panel.

Use the login name and password that you created when you registered the domain name. If you don't have a domain name and a subdomain yet, see [Getting a domain name and a subdomain](#).

2. Look for the option to change DNS records.

The option might be called something like DNS Management, Name Server Management, or Advanced Settings.

3. Locate the CNAME records for your domain.

A CNAME record, or Canonical Name record, is a type of alias used by the Domain Name System (DNS). Among other things, a CNAME record can be used to make a subdomain an alias of an external website. For more information, see [CNAME records](#) on the Networking4all website.

4. Do one of the following:

- If you don't have a CNAME record for your subdomain yet, look for an option to add a new record.
- If you already have a CNAME record for your subdomain, look for an option to edit the record.

5. Point the CNAME record from your subdomain (shown in the **Host Record** field in the example below) to your Zendesk subdomain (shown in the **Points To** field).

Add DNS Record [\(Help?\)](#)

Host Record:

TTL:

Type: [\(What's this?\)](#)

Points To:

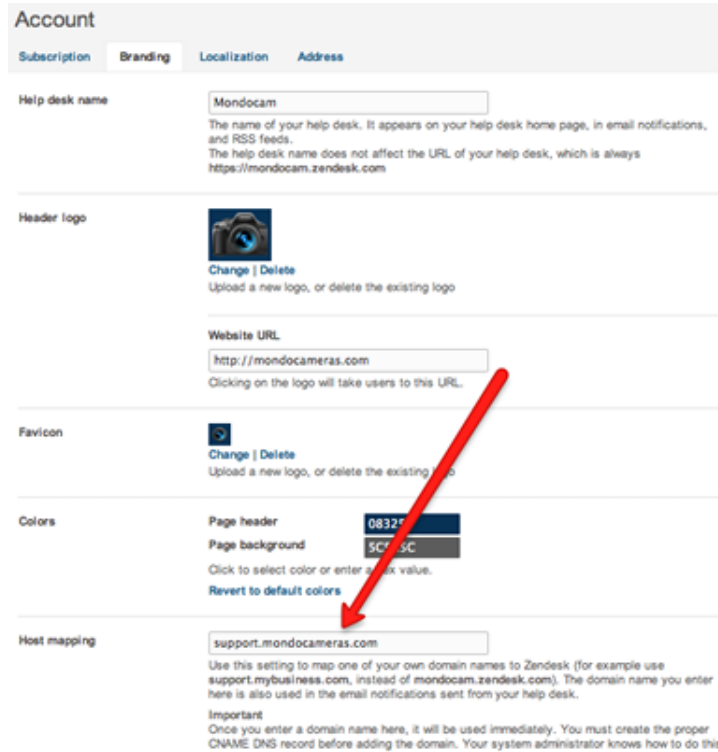
The UI and terminology may vary depending on your registrar, but the concepts are the same.

Note: It takes time for changes to the DNS system to be implemented. Typically, it can take anywhere from a few hours to a day, depending on your Time To Live (TTL) settings in the registrar's control panel. In the example above, the TTL is 14,400 seconds, or 4 hours.

Mapping the subdomain to Zendesk

After making your subdomain an alias of your Zendesk portal, map the subdomain to Zendesk. If you omit this step, your subdomain will point to a Zendesk error page rather than your portal page.


1. Click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Select the **Branding** tab at the top of the page.
3. Scroll down to the Host Mapping section and enter your subdomain name.




Account

Subscription Branding Localization Address

Help desk name:
The name of your help desk. It appears on your help desk home page, in email notifications, and RSS feeds. The help desk name does not affect the URL of your help desk, which is always <https://mondocam.zendesk.com>

Header logo:  [Change](#) | [Delete](#)
Upload a new logo, or delete the existing logo

Website URL:
Clicking on the logo will take users to this URL.

Favicon:  [Change](#) | [Delete](#)
Upload a new logo, or delete the existing logo

Colors:
 Page header:
 Page background:
Click to select color or enter a hex value.
[Revert to default colors](#)

Host mapping:
Use this setting to map one of your own domain names to Zendesk (for example use support.mybusiness.com, instead of mondocam.zendesk.com). The domain name you enter here is also used in the email notifications sent from your help desk.
Important
 Once you enter a domain name here, it will be used immediately. You must create the proper CNAME DNS record before adding the domain. Your system administrator knows how to do this.

4. Click **Save Tab**.
5. Set up hosted SSL or turn off SSL. See [Selecting a SSL option](#) for instructions.

SSL ensures secure communications with your website. If you don't set up hosted SSL or turn off SSL after mapping your subdomain to Zendesk, you may experience certificate errors or be redirected to your default zendesk.com subdomain.

Selecting a SSL option

SSL (Secure Socket Layer) is an encryption protocol that ensures secure communications with your website. Zendesk provides a free SSL certificate for all zendesk.com subdomains except for Starter accounts. However, if you use your own subdomain, our SSL certificate no longer applies. Your customers may experience certificate errors or be redirected to your default zendesk.com subdomain.

You have two options for addressing the issue:

- [Use hosted SSL](#) (Plus or Enterprise plan only)
- [Turn off SSL](#) (Regular, Trial, Plus, or Enterprise accounts)

Because of the potentially long lead times for the hosted SSL option, consider your SSL options early in the process.

Use hosted SSL

If you're on the Plus or Enterprise plan, you can use hosted SSL. The general setup workflow consists of obtaining a SSL certificate from a certificate authority and then sending it to us to install on our servers. This section explains how.

1. In Zendesk, click the **Manage** icon (⚙️) in the sidebar, then select **Settings > Security**.

Zendesk Classic: Select the **Settings** menu, then select **Security**.

2. Select the **SSL** tab at the top of the page.
3. Under **Hosted SSL**, click the link to **generate a certificate request (CSR)** to download a CSR file to your computer.



4. Provide the CSR file to a *certificate authority* such as Verisign.
The certificate authority generates a SSL certificate and gives it to you so that it can be installed on our servers.
You can also use a *wildcard certificate*, along with your private key and passphrase if applicable.
5. Send your SSL certificate to us as follows: In Zendesk, return to the **SSL** tab on the **Security** page (step 1 above) and upload your SSL certificate to Zendesk in a zip file.

The actual certificate must be a .pem file, but you should upload it in a compressed folder such as certificate.zip. Select the Nginx server when uploading your certificate.

We'll install the certificate on our servers. The installation process takes up to five business days, at which point we'll contact you by email with next steps. We'll ask you to make a change to the CNAME record for your subdomain. For instructions, see [Making the subdomain an alias of your Zendesk portal](#).

6. Enable **Regular SSL** again in Zendesk.

The option is on the **SSL** tab of the **Security** page (step 1 above). If you don't enable the option, your customers may experience problems.

Turn off SSL

You can turn off SSL so that communications with your web portal are no longer encrypted. This is the only option for the Regular or Starter plans. While using SSL is not a requirement, it is definitely a best practice. You can upgrade to the Plus or Enterprise plan to use hosted SSL.

1. In Zendesk, click the **Manage** icon (⚙️) in the sidebar, then select **Settings** > **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Click the **SSL** tab at the top of the page.
3. Uncheck the **Regular SSL** box and click **Save Tab**.

Setting up and managing forums

Forums are collections of topics that might include news and announcements, knowledge base articles, community questions and comments, and frequently asked questions (FAQs). Depending on the number of forums you have and the type of content, you might want to organize your forums into *categories*.

The Zendesk forums enable you to create topics, arrange them into forums, then further organize your forums into categories, if necessary. Viewing and editing permissions are set at the forum level, not the category level. You can create public forums and private forums.

- **Public forums** are viewable to everyone, including anonymous users who are not in your Zendesk and users who are in your Zendesk but are not signed in. Users cannot interact with your forums content by commenting, voting, subscribing, or posting, unless they sign in.
- **Private forums** (including internal and restricted forums) are viewable to either users in your Zendesk who sign in (including end-users) or agents only. You can further restrict a private forum by limiting access by organization, language, or user tags.

Note: Forum set up and management privileges depend on how your administrator set your permissions. For information for Regular and Plus accounts, see [Adding end-users, agents, and administrators](#). For information for Enterprise accounts, see [Custom agent roles](#).

For information about managing your forums content, see [Creating and managing forums content](#).

Creating a public forum

Public forums are viewable to everyone, including anonymous users who are not in your Zendesk and users who are in your Zendesk but are not signed in. Only users who sign in can interact with your forums content by commenting, voting, subscribing, and posting.

You determine the forum content type (articles, ideas, or questions) and who can contribute content. Each forum can be assigned to only one category. You can have a combination of public and private forums in the same category.

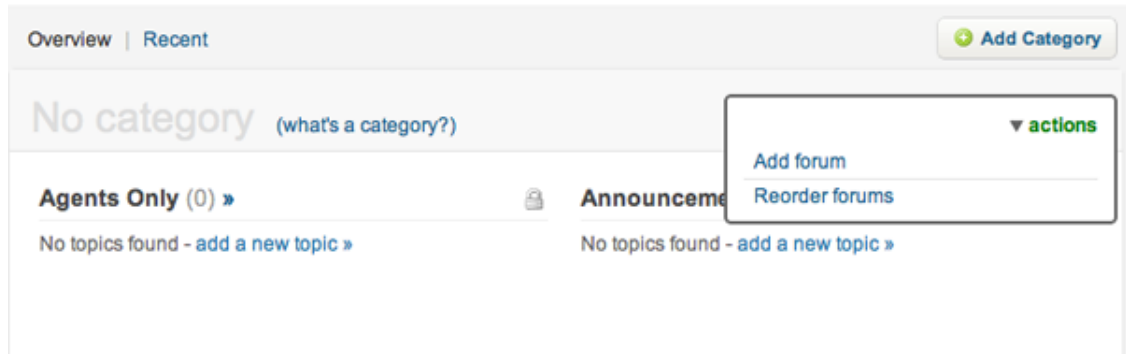
For information about creating a private forum, see [Creating a private or restricted forum](#). For information about creating a category, see [Creating a category for forums](#).

To add a public forum

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Select **Actions > Add forum** to the right of **No category**. Or, if you have multiple categories, select **Actions > Add a forum to this category** beside the category where you'd like to add the forum.



3. Enter a Forum title and Description.

This description will be visible in the right column when users view this forum.

Forum title

Digital Compact Cameras

Description

Get the latest news and updates on MondoCam digital cameras!

A brief description of topics relevant for this forum. Basic HTML allowed.

Category

Product News and Updates

Content

Articles – users can vote for the most helpful articles

Order by

Most helpful first (as voted by users)

Role restrictions

Who can view topics in this forum?

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

User property restrictions

Restrict access to organization

(None)

Restrict access to end-users whose language is:

(None)

Restrict access to end-users and organizations with all of the following tags

Add forum

4. Confirm that this Category is where you want your new forum.

- In the **Content** section, select the type of forum you want to create. And, if you're creating an article forum, change **Order By**, if you want.

Choose from the following forum types:

- **Questions forum** enables users to ask questions and encourage others to participate by answering topics or voting to show they would like an answer.
 - **Ideas forum** enables users to suggest ideas and also comment and vote on ideas posted by others.
 - **Articles forum** enables you to build a knowledge base of content.
- In **Role restrictions**, for the option **Who can view topics in this forum**, make sure **Everybody** is selected.

This means that everyone can view your forums, including users who are not in your Zendesk and users who are in your Zendesk but are not signed in. They cannot add comments or create or edit content.

Role restrictions

Who can view topics in this forum?

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

- In **Role restrictions**, for the option **Who can create topics in this forum**, select one of the following:
 - **Logged-in users** means that any users in your Zendesk, including end-users, can sign in and create and edit content.
 - **Moderators** means that only agents with forum moderator privileges can create and edit content. All administrators automatically have forum moderator privileges.

Role restrictions

Who can view topics in this forum?

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

Note: Forum moderator privileges depend on how your administrator set your permissions. For information for Regular and Plus accounts, see [Adding end-users, agents, and administrators](#). For information for Enterprise accounts, see [Custom agent roles](#).

- Click **Add forum**.

The new forum opens. The forum title is at the top and the forum description is in the right column.

Creating a private or restricted forum

Private forums (including internal and restricted forums) are viewable to either users in your Zendesk who sign in (including end-users) or agents only. You can further restrict a private forum by limiting access by organization, language, or user tags.

You determine the forum content type (articles, ideas, or questions) and who can contribute content. Each forum can be assigned to only one category. You can have a combination of public and private forums in the same category.

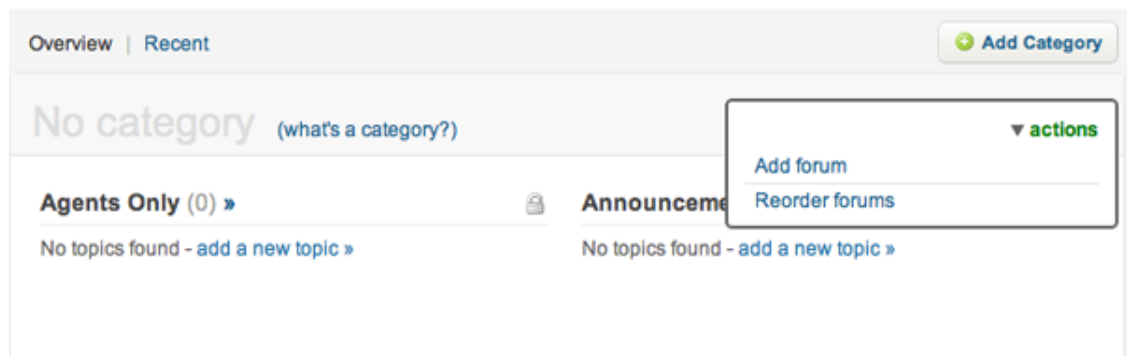
For information about creating a public forum, see [Creating a public forum](#). For information about creating a category, see [Creating a category for forums](#).

To add a private or restricted forum

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Select **Actions** > **Add forum** to the right of **No category**. Or, if you have multiple categories, select **Actions** > **Add a forum to this category** beside the category where you'd like to add the forum.



3. Enter a **Forum title** and **Description**.

This description will be visible in the right column when users view this forum.

Forum title

Digital Compact Cameras

Description

Get the latest news and updates on [MondoCam](#) digital cameras!

A brief description of topics relevant for this forum. Basic HTML allowed.

Category

Product News and Updates

Content

Articles – users can vote for the most helpful articles

Order by

Most helpful first (as voted by users)

Role restrictions

Who can view topics in this forum?

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

User property restrictions

Restrict access to organization

(None)

Restrict access to end-users whose language is:

(None)

Restrict access to end-users and organizations with all of the following tags

Add forum

4. Confirm that this **Category** is where you want your new forum to appear.
5. In the **Content** section, select the type of forum you want to create. And, if you're creating an article forum, change **Order By**, if you want.

Select one of the following forum types:

- **Questions forum** enables users to ask questions and encourage others to participate by answering topics or voting to show they would like an answer.
 - **Ideas forum** enables users to suggest ideas and also comment and vote on ideas posted by others.
 - **Articles forum** enables you to build a knowledge base of content.
6. In the **Role restrictions** section, for the option **Who can view topics in this forum**, select one of the following:
 - **Logged-in users** means that any users in your Zendesk, including end-users, can sign in and view content.

- **Agent only** means that only your agents can view content. Select this option to create an internal forum.

Role restrictions

Who can view topics in this forum?

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

7. In the **Role restrictions** section, for the option **Who can create topics in this forum**, elect one of the following:
- **Logged-in users** means that any users in your Zendesk, including end-users, can sign in and create and edit content. You cannot select this option if you limit who can view topics to **Agent only**.
 - **Moderators** means that only agents who are forum moderators can create and edit content. All administrators automatically have forum moderator privileges.

Role restrictions

Who can view topics in this forum?

Everybody Logged-in users Agents only

Who can create topics in this forum?

Logged-in users Moderators only

Note: Forum moderator privileges depend on how your administrator set your permissions. For information for Regular and Plus accounts, see [Adding end-users, agents, and administrators](#). For information for Enterprise accounts, see [Custom agent roles](#).

8. In the **User property restrictions** section, you can restrict access to certain users according to the following:
- **Organization** limits forum access to the selected organization. To select an organization, choose from the drop-down, if available, or start typing and choose one of the matching organizations that appears. You can select only one organization.
 - **Language** limits forum access to end-users with the selected language. To select a language, choose from the drop-down. You cannot select this option if you select **Agent only** in Role restrictions. This option is not available if you have not enabled multiple languages in your Zendesk.
- Note:** To restrict by language, you must have enabled multiple languages in your Zendesk. To do so, see [Configuring your Zendesk to support multiple languages](#).
- **Tags** limits forum access to end-users and organizations with the specified tags. To add tags, start typing and choose one of the matching tags that appears. You can add multiple tags. For more information about tags, see [Using Tags](#).

User property restrictions

Restrict access to organization

Restrict access to end-users whose language is:

Restrict access to end-users and organizations with all of the following tags

Note: If you apply user restrictions, be sure to select **Logged-in users** or **Agents only** in the **Who can view topics in this forum** option, depending on whether it's an external or an internal group you are giving viewing privileges. For the content editing option, **Who can create topics in this forum**, choose **Logged-in users** if you want any logged-in users with this org, language, or tag to have editing privileges. Otherwise, choose moderators if you want only moderators to have editing privileges.

9. Click Add forum.

The new forum opens. The forum title is at the top and the forum description is in the right column.

Creating a category for forums

Depending on your forums and content, you might want to organize your forums into categories. You can have multiple categories in your Web portal, with multiple forums in each category.

Viewing and editing permissions are set at the forum level, not the category level. You can have a combination of public and private forums in the same category.

Support tip To understand what the "no category" is, check out the Support tip [The "No Category" Category](#) in our forums.

For information about managing your categories, see [Managing your categories](#).

To create a category

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Click the **Add category** button.

The screenshot shows the 'Forums' section of the Zendesk interface. At the top, there is a search bar with a magnifying glass icon and a 'Search' button. Below the search bar, there are navigation links for 'Overview', 'Recent', and 'Stats'. On the right side, there is a button labeled 'add category' with a mouse cursor pointing to it. Below the navigation links, there is a section titled 'Forum Stats (created in last 30 days)'.

3. Enter a **Category name** and **Description**.

The category name will be visible as a heading on your home page and in your forums. The description will appear in the right column.

4. Click **Add category**.

Your new category is added to your forums.

Managing your forums

You can edit or delete forums as needed. You can also reorder forums within a category or move a forum to a different category. Each forum can belong to only one category.

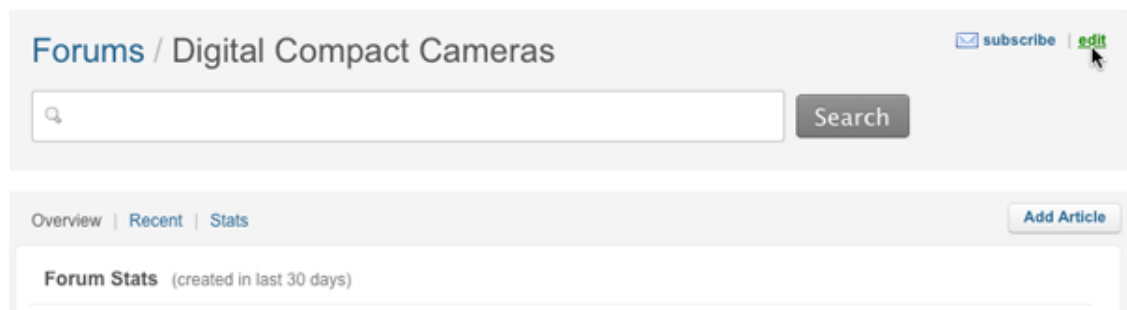
For information about creating forums, see [Adding a public forum](#) or [Adding a private or restricted forum](#).

To edit a forum, including viewing permissions

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Click the title of the forum you want to change, then click **Edit**.



3. Make any changes you'd like.
4. Click **Update forum**.

To delete a forum

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

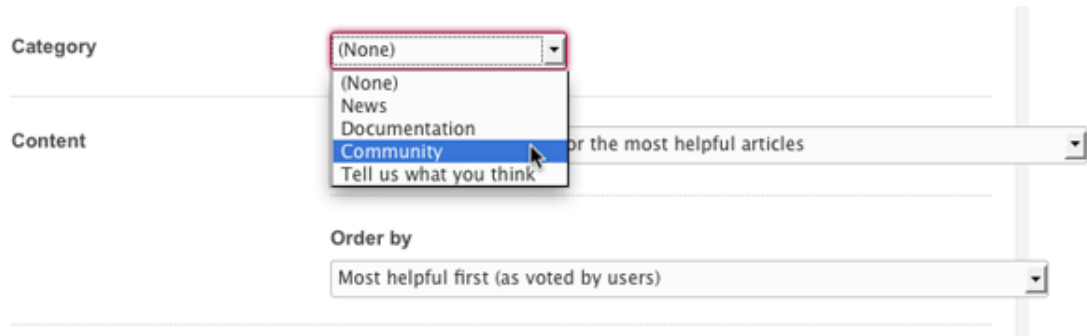
2. Click the title of the forum you want to remove, then click **Edit**.
3. Click **Delete** at the bottom of the page.
4. Click **OK** to confirm the deletion.

To move a forum to another category

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Click the title of the forum you want to move, then click **Edit**.
3. In the **Category** section, select a different category from the drop-down menu.



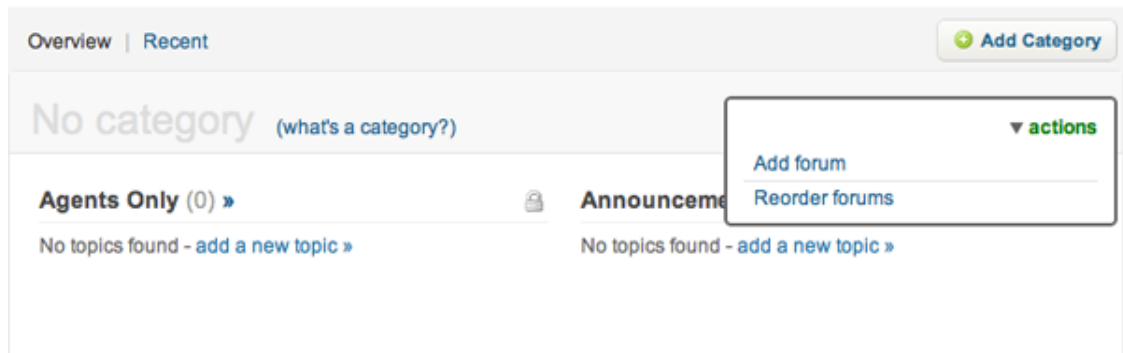
4. Click **Update forum**.

To reorder forums

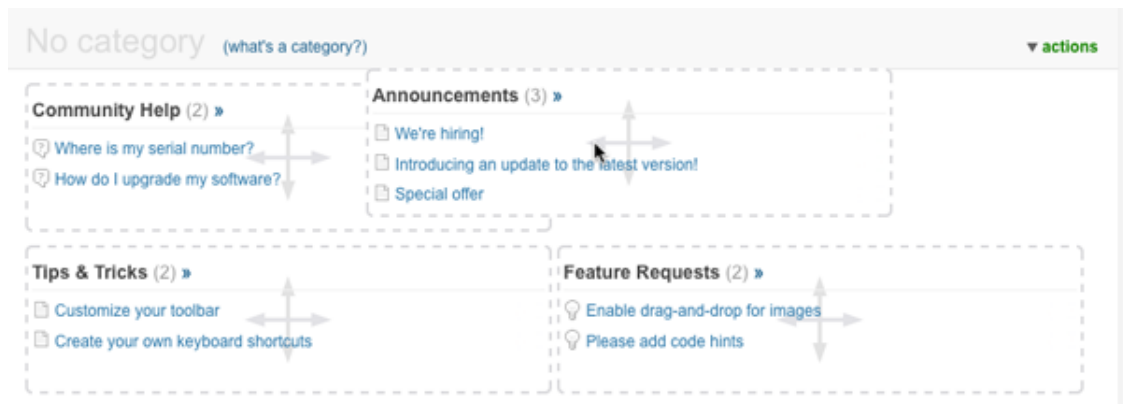
1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Select **Actions > Reorder forums** to the right of **No category**. Or, if you have multiple categories, select **Actions > Reorder forums in this category** beside the category where you'd like to reorder your forums.



3. Drag the forums to new positions.



4. When you are finished, click **Done**.

Managing your categories

You can edit or delete categories as needed. You can also reorder your categories.

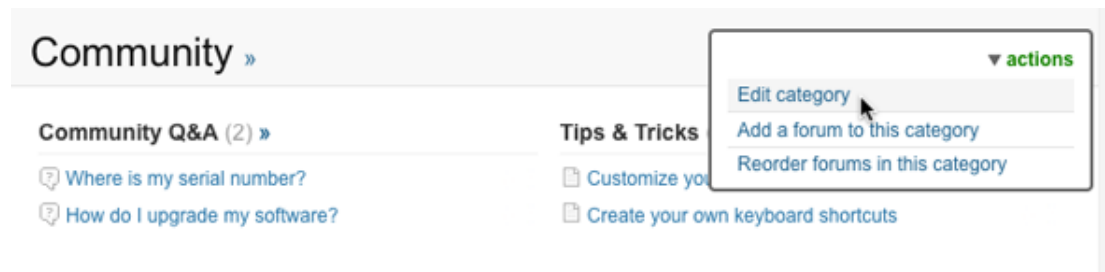
For information about creating a category, see [Creating a category for forums](#).

To edit a category name or description

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Select **Actions** > **Edit category** beside the category you'd like to edit.



3. Edit the **Category name** or the **Description**.
4. Click **Update category**.

To delete a category

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Select **Actions** > **Edit category** beside the category you'd like to delete.
3. Click **Delete**.
4. Click **OK** to confirm the deletion.

To reorder your categories

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Scroll to the bottom of your forums, then click **Reorder categories**.
3. Drag your categories to new positions.



4. When you are finished, click **Done**.

Creating and managing your forums content

Forums are collections of topics that might include news and announcements, knowledge base articles, community questions and comments, and frequently asked questions (FAQs). Depending on the number of forums you have and the type of content, you might want to organize your forums into *categories*.

Your forums give customers an opportunity to *self-serve*, by giving them information, and potentially answering their questions, before they contact your support team. You can use the forums to create a knowledge base of support information for your products and services. You can enable your end-users to comment on topics or new create new topics themselves.

Note:

Forum editing and content creation privileges depend on how your administrator set your permissions. For information for Regular and Plus accounts, see [Adding end-users, agents, and administrators](#). For information for Enterprise accounts, see [Custom agent roles](#).

For information about setting up your forums, see [Setting up and managing forums](#).

Creating forum topics

You can create a new, blank forum topic directly in a forum. Alternatively, you can create a new forum topic from an existing ticket (see [Posting a forum topic based on a ticket](#)).

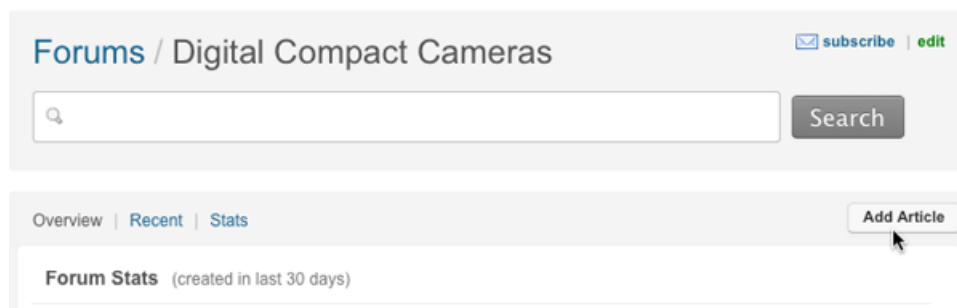
To create a forum topic

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Click the title of a forum where you want to add an article, then click **Add article**.

If you selected a question or ideas forum, click **Ask a question** or **Suggest an idea**.



3. Enter a **Title** for the topic.

Title

What operating systems are compatible with my camera?

Which forum does this topic belong to?

Digital Compact Cameras

Text

MondoCam digital cameras (both SLR and compact types) are designed for use with most major computer operating systems such as Windows 98 Second Edition, Windows ME, Windows 2000, Windows XP, Windows Vista (including x64), and Mac OS 10.1 and up.

Please visit the MondoCam Driver Library and select your model. From your models page select the Drivers/Software link to open a new window which will detail the available drivers as well as the software applications for your product using the operating systems supported by MondoCam.

Path:

Tags Use tags to boost search results for specific words and to relate topics with other topics

Disable comments? do not allow users to add comments

Pin to home page? pin topic to the home page of the help desk

Highlight in forum? highlight topic in forum

Attachment(s)

[Attach file »](#)

Add

- In **Which forum does this topic belong to**, confirm this is the forum where you want your topic to appear or select a new forum.
- Enter content in the **Text** window.

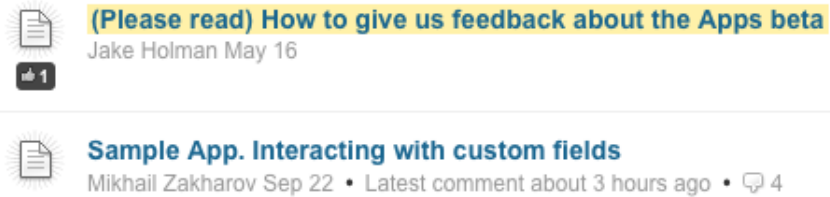
You can write new content or you can copy and paste existing content. You can also add links, images, video, and HTML if you have moderator privileges. Other users have only basic text formatting options when they create a forum topic.

Note: If you want to embed video in your forum topic, see [How to embed videos into your forums](#) in the Zendesk forums.

- Enter **Tags**, if you want.

For more information about tags, see [Using Tags](#).

- Select any of the following options:
 - Disable comments** means that users can view this topic but they cannot add comments to the topic.
 - Pin to home page** means that this topic appears on your Web portal home page.
 - Highlight in forum** means that the topic appears above other (unhighlighted) posts in the forum, and the title of the topic appears with color highlighting. In the following example, the first topic is highlighted, the second is not.



8. Add an **Attachment** if you want.
9. Click **Add**.

Your new forum topic displays. You can edit the topic anytime by clicking **Edit** in the upper-right corner.

Modifying the author's name and posted date on a forum article

You cannot change the author for a forum article. For example, if someone rewrites a topic, you cannot change the author's name to the new author.

Note: You might consider posting all official content under one user profile that uses a generic name, such as Documentation.

However, if you change the author's name in their user profile, the name will be updated on all their topics and comments. This is useful if someone leaves the company. For employees who have left the company, you can also change their role to end-user and all their posts and comments will remain. If you suspend the user, all of their posts remain. If you delete the user, their posts remain, but "Deleted user" is added to their name in forum posts and comments.

It is not possible to change the date on a topic. The date reflects the original post date and does not change when an article is updated. You might want to add an "Updated on" date as the first line in your article.

Community tip! You can hide the author name and the date in a forum article if you'd like. See how Arnaud does it in [Hide the name of submitter and date in forum article](#).

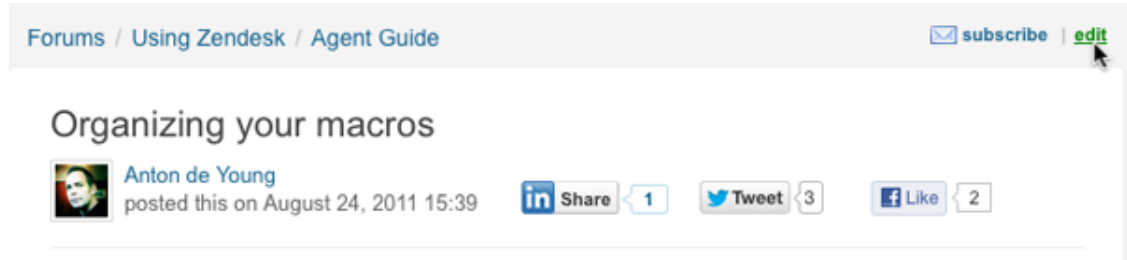
Editing, deleting, and moving forum topics

You can edit or delete forum articles as needed. You can also move a forum article to a different forum if you need to.

Note: For information about pinning topics to your Web portal, see [Pinning forum topics to your Web portal](#). For information about creating a ticket based on a forum topic, see [Creating a ticket from a forum topic](#) in the Zendesk Agent Guide.

To edit a forum article

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.
Zendesk Classic: Click **Forums** in the menu bar.
2. Click the forum title that contains the topic.
3. Click the title of the topic you want to edit, then click **Edit**.



4. Make any changes you'd like.
5. Click **Update**.

To delete a forum article

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Click the forum title that contains the topic.
3. Click the title of the topic you want to edit, then click **Edit**.
4. Scroll to the bottom of the page and click **Delete**.
5. Click **OK** in the confirmation box to delete the topic.

To move a forum article to another forum

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

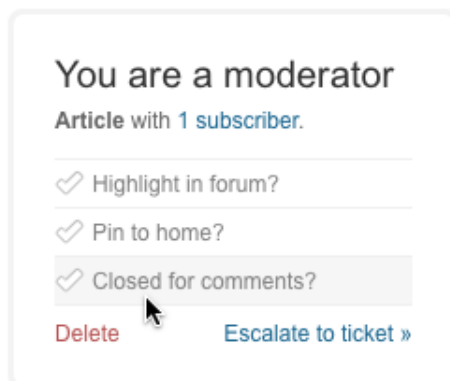
2. Click the forum title that contains the topic.
3. Click the title of the topic you want to edit, then click **Edit**.
4. Select another forum in **Which forum does this topic belong to**.
5. Click **Update**.

Disable commenting for a forum topic

You can disable commenting for a forum topic at any time. When you do so, users can view this topic and any existing comments, but they cannot add new comments to the topic.

To close a forum topic for comments

1. Open the forum topic where you want to disable commenting.
2. Click **Closed for comments** in the widget in the right column.

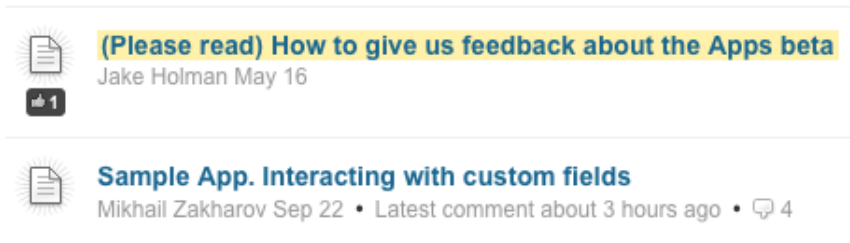


3. When you are finished, you can simply navigate away from the topic.

Highlighting a topic in a forum

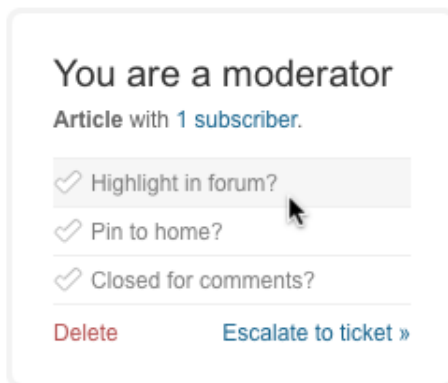
You can highlight a topic in a forum so that it stands out, if you have the appropriate permissions. When you do so, the topic appears above other (unhighlighted) posts in the forum, and the title of the topic appears with color highlighting.

In the following example, the first topic is highlighted, the second is not.



To highlight or unhighlight a topic in a forum

1. Open the forum topic you want to highlight or unhighlight.
2. Click **Highlight in forum** or **Unhighlight in forum** in the widget in the right column.

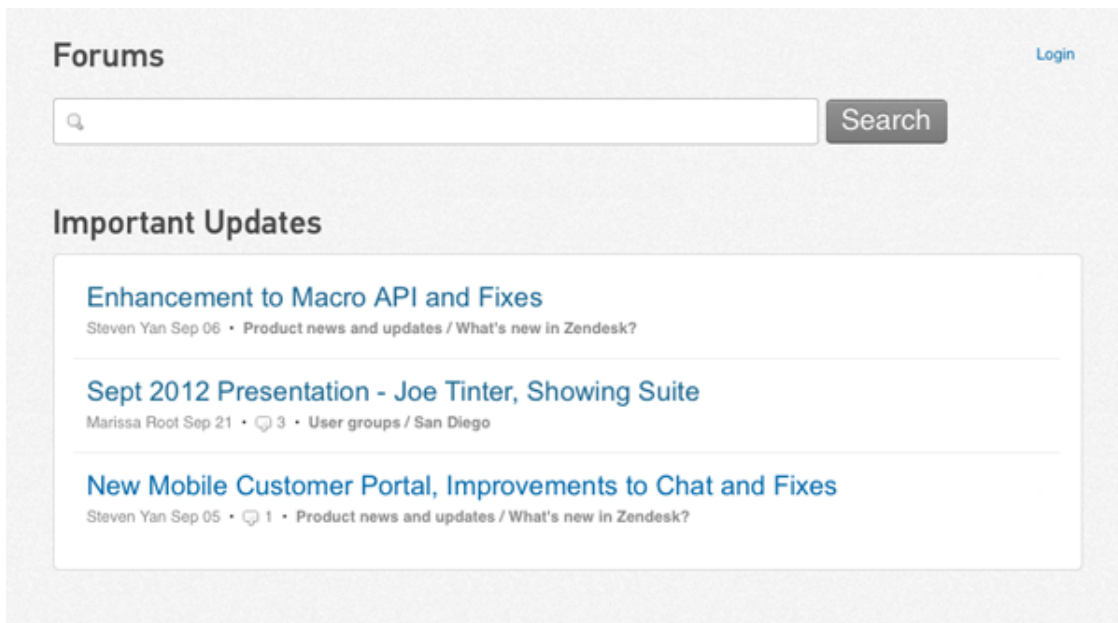


3. When you are finished, you can simply navigate away from the topic.

Pinning forum topics to your Web portal

If you have forum moderator permissions, you can indicate which topics you want to appear on the home page on a topic-by-topic basis (up to three topics for each forum). This is called pinning a topic to the home page.

For example, you might want the three most recent topics to appear on the home page. Or you might want to keep an important release announcement on the home page until the release date. Here's an example from Zendesk.

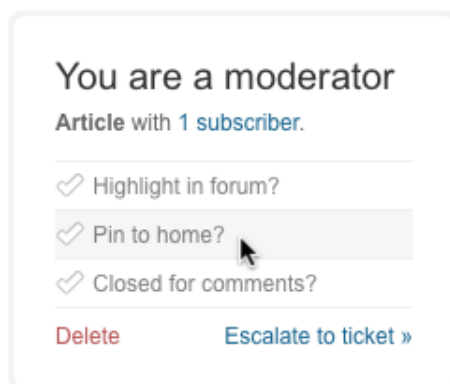


To pin a forum topic to your Web portal home page

1. Click your profile icon in the upper-right corner of the page header and select **Go to web portal**, then click **Forums** in the menu bar.

Zendesk Classic: Click **Forums** in the menu bar.

2. Open the forum article you want to pin to your home page.
3. Click **Pin to home** in the widget in the right column.



4. When you are finished, you can simply navigate away from the topic.

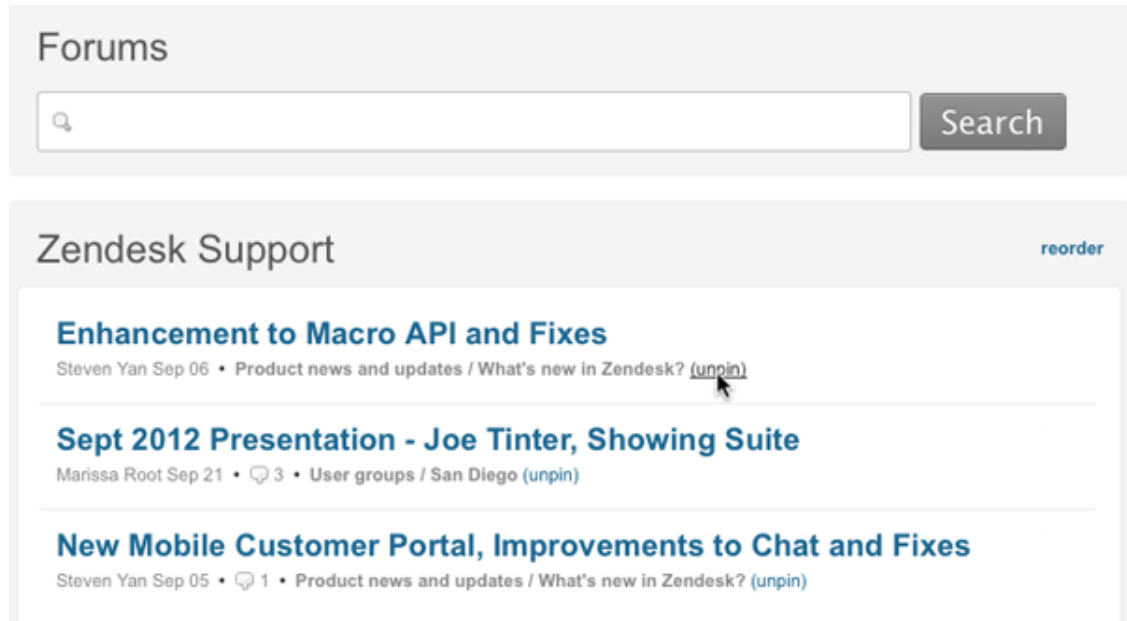
You can click **Home** to see the forum topic pinned to the home page.

To unpin a forum topic to the home page

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

Zendesk Classic: Click **Home** in the menu bar.

2. Locate the forum topic on the page and click **Unpin** beside the topic title.



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

Note: Alternatively, you can select unpin from the topic itself, instead of from the home page. While you are viewing the topic that you want to unpin, click **Unpin** in the widget in the right column.

To reorder pinned forum topics

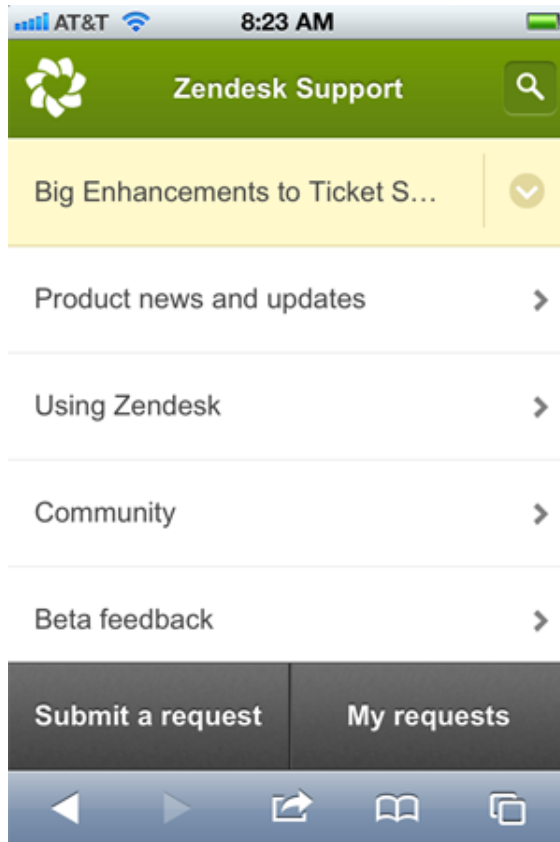
1. Click your profile icon in the upper-right corner of the page header, then select **Go to web portal**.

Zendesk Classic: Click **Home** in the menu bar.

2. Click **Reorder** in the pinned topics section.
3. Drag topic titles to reorder them.
4. Click **Done**.

Managing your mobile web portal

A version of your Zendesk web portal that is optimized for Apple iOS and Google Android mobile devices is available to your support staff and your end-users.



End-users will see your web portal, and depending upon the features you've made available to them, they may also submit and track their requests.

Agents that sign in to the mobile version will see all the Web portal content that they have permission to see. Agents cannot access the agent interface or work with tickets in the mobile site. To do that, agents need to download and install a mobile version of the Zendesk App. For more information, see <http://www.zendesk.com/product/mobile>.

Your mobile site is enabled by default. If, for some reason, you want to disable it, follow these steps.

To disable/enable the mobile version of your Zendesk

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Web portal**.
Zendesk Classic: Select the **Settings** menu, then select **Channels > Web portal > Edit**.
2. Uncheck the **Mobile Version > Enable** setting.
3. Click **Save**.

When disabled, your agents and end-users see the standard desktop web browser version of your Zendesk.

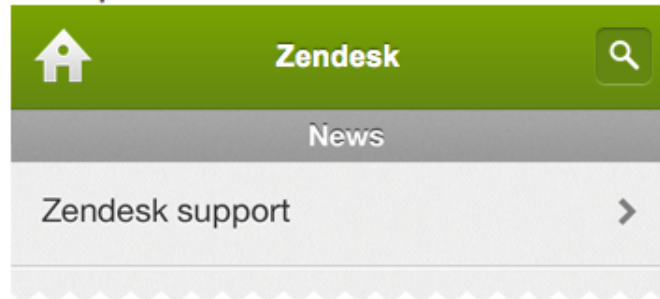
Your mobile Zendesk will use the same branding colors you set on the account branding page (see [How to brand your Zendesk web portal](#)). You can additionally set a title for your mobile Zendesk and also add a logo that is sized appropriately for a mobile browser. By default, the title is the same as your Zendesk account. The title you set here only affects your mobile site.

To edit the branding of your mobile Zendesk site

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Click the **Branding** tab.

Mobile branding

Header preview



Header title

Zendesk

Header logo

No file chosen

The uploaded header logo appears on the left side of the mobile header. Do not upload a logo larger than 114 x 114 pixels.

To enable/disable the mobile site, go to the [Web portal](#) settings.

3. Enter the title for your mobile site.
4. Optionally, choose and upload a logo that is no larger than 114 x 114 pixels. If you use a larger logo, it will be scaled down to fit, which might degrade the quality of your logo. If you don't upload a logo, the default home logo is used (as shown above).
5. Click **Save** tab.

Analyzing forum activity (Plus and Enterprise)

To more closely monitor how active your knowledge base and forums are, Zendesk provides forum analytics. For each category and forum, you can 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.

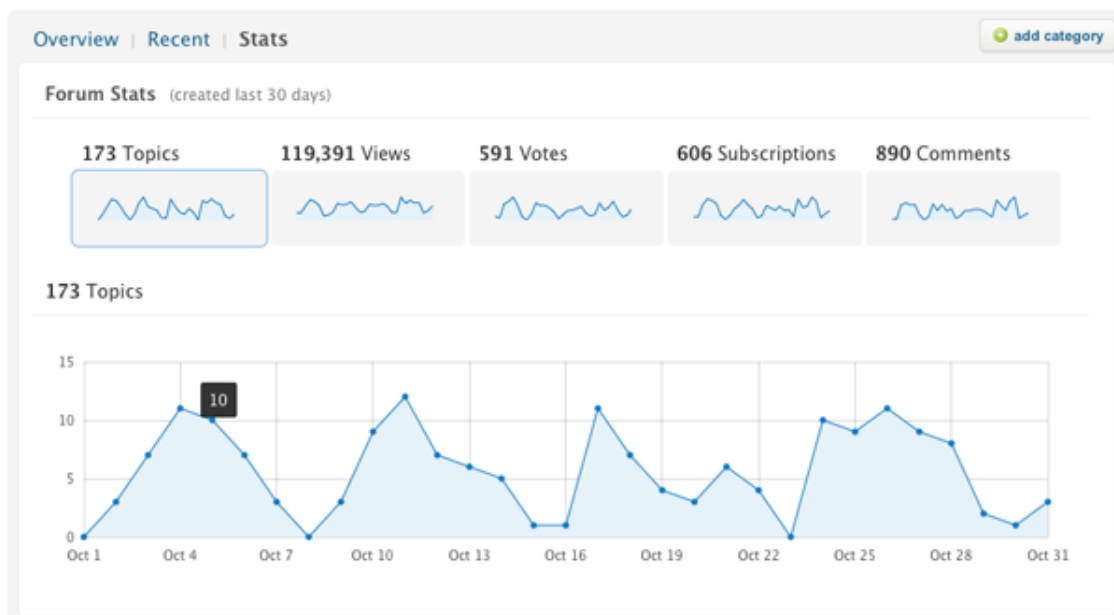
Forum analytics is available in the Plus and Enterprise versions of Zendesk. The statistics are only visible to administrators and agents who have permission to moderate the forums.

You can view forum analytics from your forums or through the Reporting dashboard:

- Click your profile icon in the upper-right corner of the page header, then select **Go to web portal**. Click **Forums** in the menu bar.
- Click the **Reporting** icon (📊) in the sidebar, then click the **Forum** tab.

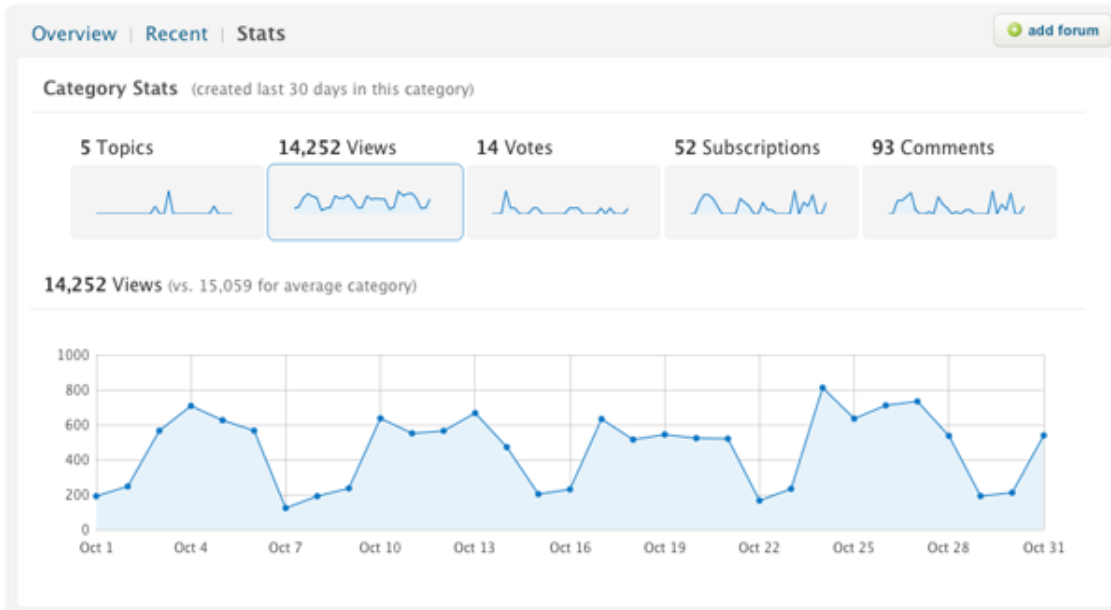
Zendesk Classic: To open your forums, click **Forums** in the menu bar. To open the Reporting dashboard, select **Manage > Reporting**, then click the **Forum** tab.

When you see the forum analytics, click any of the five data sets at the top; the Topics data set is open by default.

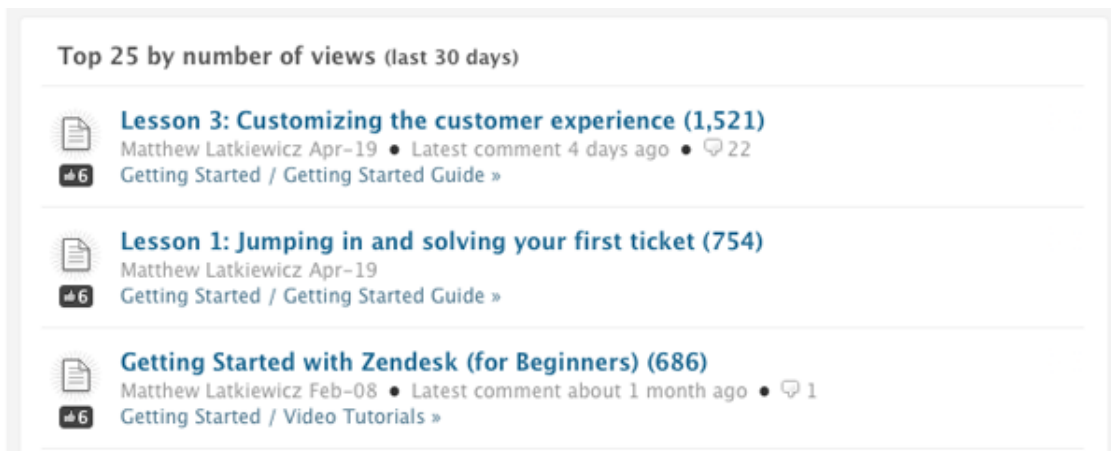


By clicking one of the five data sets, you see a more detailed graph that contains a node for each day. Hover your mouse over the nodes to see the total number for that day.

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 are displayed in your forum pages by default. If you don't to display them there (and instead just use them in the Reporting menu), follow these steps to disable it:

To disable forum analytics in your forum pages

1. Click the **Manage** icon (⚙️) in the sidebar then select **Channels > Web portal**.
Zendesk Classic: Select the **Settings** menu and then select **Channels > Web portal > Edit**.
2. Deselect the **Forum & Search analytics > Show** option.
3. Click **Save**.

How statistics are calculated

The statistics are calculated based on the following:

- All activity for the last 30 days
- Access by both end-users, agents, and administrators
- 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.

Note:

Forum statistics are only gathered when end-users access the HTML versions of the forum pages via a Web browser. Statistics are not gathered when accessed via the Zendesk API.

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.

Analyzing knowledge base search activity (Plus and Enterprise)

Zendesk provides a search analytics dashboard so that you can review knowledge base search terms from the last 30 days. For each search term you can see the number of searches for that term, number and type of search results returned (if any), click-through, and the next action taken.

Analyzing search terms can help you improve customer success. Most end-users look for information in your knowledge base by typing a search query, reviewing the search results, then selecting and reading an article. If they are not successful at any step of this process, they might request support.

Search analytics organizes data into four sets to help you pinpoint potential problems when end-users search for help in your knowledge base:

- Total end-user searches (regardless of results)
- Searches with no results
- Searches with results but the end-user did not click any of the results
- Searches that resulted in the end-user creating a ticket (due to insufficient results or content)


For each scenario you have an opportunity to make your customers more successful by improving search results and improving your knowledge base content. Doing so will help customers find the answers they need and avoid making support requests.

Search analytics is available in the Plus and Enterprise versions of Zendesk. The statistics are only visible to administrators and agents who have permission to moderate the forums or view reports.

Viewing search data

Search data includes only end-user searches, not agent searches.

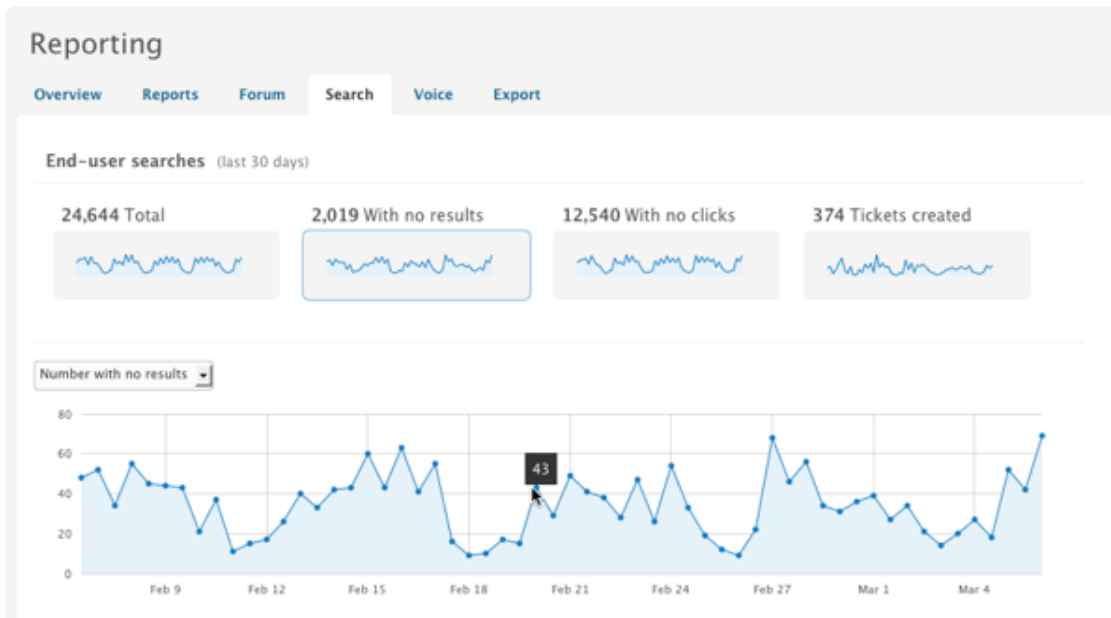
To open the search analytics dashboard

- Click the **Reporting** icon () in the sidebar, then click the **Search** tab.

Zendesk Classic: Select **Manage > Reporting**, then click the **Search** tab.

At the top you have four options for viewing search data: total searches, searches with no search results, searches with no clicks (where no search result was selected), or searches that resulted in a ticket being created. Above each data set you can see the number of searches in the last 30 days for that data set.

Click one of the four data sets to see a more detailed graph with a node for each day (the graph for Total shows by default). Hover your mouse over a node to see the total number for that day. You can change the graph to show the numbers as a percentage of the total. To do so, select **% of total searches** from the drop-down menu in the graph (this option is not available for the Total data set).



Below the detailed graph you can see search data in a table. The Total data set includes data for the top 500 searches overall. Each of the other data sets filters the top 500 search terms accordingly to show data for searches that had no results, no clicks, or resulted in tickets.

For the Total data set, you can click **More** at the bottom of the search terms table to see the next 15 searches. You can view up to 500 searches. You can also limit the top 500 searches to only those from the Feedback tab, by selecting **Feedback tab only** above the search terms table. This option does not affect the other data sets.

Top 500 searches Feedback Tab only | CSV

1 to 15 of 498

Search string	Searches	Avg. # of results	CTR %	Tickets created	Top clicked result
email	143	679.0	55.2	0	Forwarding email from o...
jira	102	49.7	55.9	2	Zendesk for JIRA 2.0: G...
feedback tab	90	331.5	53.3	1	Feedback tab advanced u...
host mapping	84	75.0	73.8	0	Mapping a host name of ...
voice	83	54.3	60.2	0	Setting up Zendesk Voice
css	82	125.5	62.2	0	How to customize the he...

For each search string you can view the information described in the following table. You can also click the term in the **Search string** column to see the associated search results or you can click the topic in the **Top clicked result** column to view the content that was most clicked after the search.

Table 23: End-user search data

Field	Description
Search string	Exact term the end-user entered in the search
Searches	Total number of end-user searches for a term over the last 30 days
Avg. # of results	Average number of search results displayed for a search term

Field	Description
CTR %	Click-through. Percentage of end-users who clicked one of the search results displayed for a search term.
Tickets created	Total number of tickets created immediately after a search
Top clicked result	Knowledge base content that was the most selected from search results

Disabling search analytics

Search analytics is enabled by default. If you don't want to use this feature, you can disable it.

To disable search analytics

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Web portal**.
Zendesk Classic: Select the **Settings** menu, then select **Channels > Web portal > Edit**.
2. Deselect the **Forum & Search analytics > Show** option.
3. Click **Save**.

Exporting search data

You can export search data as a CSV (comma separated values) file so that you can save and analyze the data.

To export search data, click **CSV** above the search terms table.

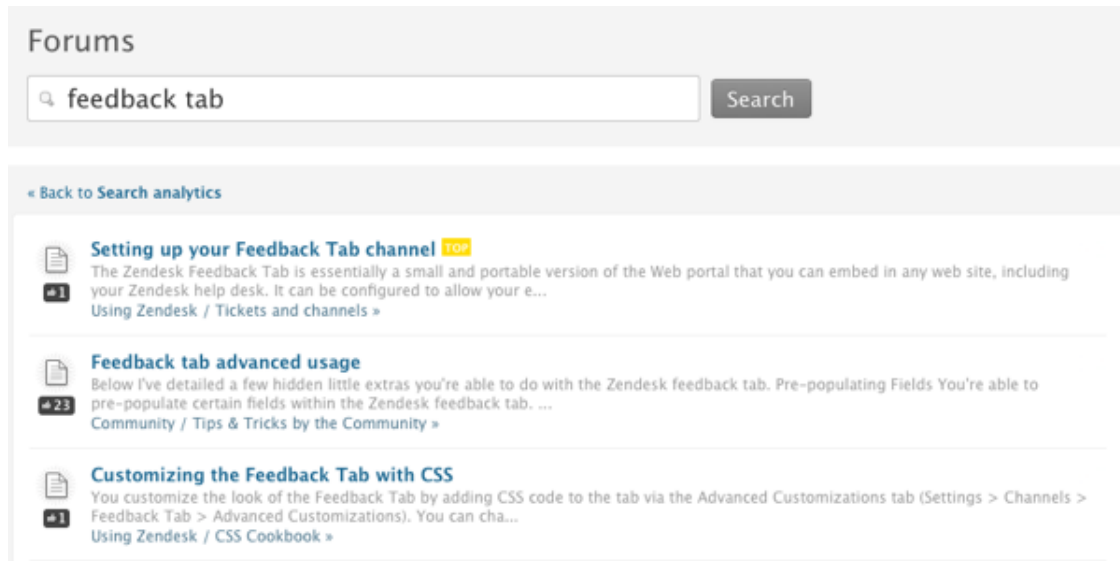
You can open the CSV file in a text editor or in a spreadsheet application such as Microsoft Excel or OpenOffice.org Calc. The first row of the CSV file is the header row, which contains the names of the data contained in the file.

Finding tickets and content related to top search terms

When you are reviewing search terms that resulted in tickets, you might want to find those tickets. The best way to do so is to search for tickets that include the search term and title of the most clicked content for that term. From the results, look for those tickets created in the last 30 days.

You might also want to find content that users are selecting in searches to make sure it's the best content. You can see the most clicked content for each search term in the search terms table for each data set.

There is also a visual indicator for top content in search results. Any piece of content that is associated with a top 500 search term and is a most clicked result appears with a special label in search results (at the end of the content title).



Making changes based on search data

Search analytics gives you insight into what your customers are looking for and where they are failing to find answers.

To make end-users more successful you can analyze search data (review searches with no clicks or no results, look at click-through, notice whether the best content appears in results, and so on), then take actions to improve search results and your knowledge base content.

After you make changes, it will take about three minutes before the content is indexed and can be searched.

Improve search results

You can improve end-user search results by updating content in the following ways:

- Add tags to content. You can add tags to content so that the appropriate content appears in search results. For example, if you see that end-users are searching for "e-mail" but you use "email" without a dash in your content, add a tag with the similar term to the content.
- Update content titles. You can rewrite titles to more closely match end-user searches. For example, if your topic is titled "Deleting an email account" and end-users are searching for "removing a user from email," consider updating the title.
- Break content into smaller topics. You can divide large topics into smaller topics to help customers find what they are looking for. For example, instead of "Managing email" consider smaller topics about "Setting up email," "Adding email accounts," and "Deleting email accounts."
- Update content body text. You can add common end-user search terms to the body of appropriate topics so that the topic appears higher in search results.
- Remove old content. You can remove old content so that it does not clutter search results and confuse your customers.

Improve your knowledge base content

You can improve your knowledge base content by identifying content gaps and updating content:

- Update existing content. You can update existing content to be more complete. For example, if end-users are searching for how to schedule a backup, and you have a topic on running manual backups but not how to schedule backups, consider adding that information to the topic. If scheduling backups is not an option, you might want to add that info to the topic so that end-users don't continue looking for an answer.
- Add new content. You can add content for common searches that aren't yielding any search results. For example, if end-users are searching for "accessing email remotely" and no content exist on that topic, consider adding that topic to your knowledge base.

Optimizing your knowledge base search results

You have a number of options for improving your end-user Web portal search results so that they find the answers to their questions and don't need to request support via tickets. Helping your customers help themselves is referred to as *self-service* and the ability to easily find information via search is a key part of making that effective.

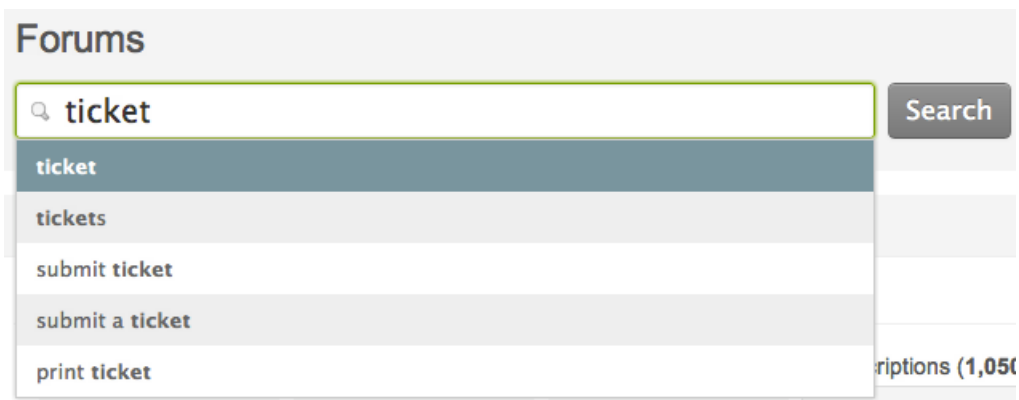
In addition to simple full text search of all the content in your web portal, Zendesk provides several search enhancements that help your end-users more quickly locate the information they need. These enhancements are core features of the search engine in Zendesk, which means that there's no need for you to configure or enable them for your Zendesk.

The first is *advanced stemming*. This a patent application pending feature and is only available in Zendesk. If you're familiar with search stemming, you know that if you search for "work" you'll also get search results of variations of that such as "works", "worked", "working", and "workflow". The advanced stemming available in Zendesk weights results based on how closely a variation matches the original search term. Using "work" as our example search term once again, the variation "works" will be weighted higher in the search results because it more closely matches what the user searched for. A variation such as "workflow" would then have less weight and appear lower in the list of search results.

The Zendesk search engine also boosts search results for content that matches an exact phrase search (which we refer to as *implicit phrase queries*). For example, if you search for a phrase such as "lost my password" (enclosed in quotes), any knowledge base content that contains that exact phrase is boosted higher in the search results. Any content containing "lost" and "my" and "password" as single words is returned lower in search results.

Search query auto suggestions

You can enhance your end-user Web portal search by enabling search query auto suggestions. This presents end-users with a list of search suggestions that appear when they begin entering a search query.



The suggestions are based on previous search queries by your end-users, which means that they are relevant to your knowledge base and therefore provide convenient shortcuts for locating frequently

searched for content. Any search string queried at least five times by your end-users during the last 90 days can appear as a search suggestion.

This feature is enabled by default. You can turn it off (and on again) by following these steps.

To disable/enable auto-complete search queries

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Web portal**.
Zendesk Classic: Select the **Settings** menu, then **Channels > Web portal > Edit**.
2. In the **Search** section, click the **Auto-complete users search queries** option.
3. Click the **Save** button

Boosting search results for content created by agents or end-users

Many Zendesk customers provide knowledge base content in their Web portals and also allow their end-users to add comments and new topics. Doing so allows their community to ask questions, submit ideas, share tips, and so on. If your Web portal is a mix of both agent created and end-user created content, you have the option of weighting search results to favor either types of content. For example, if you want your official FAQs to appear before any end-user created content, you weight the search results to favor content created by your agents.

To boost knowledge base content by user type

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Web portal**.
Zendesk Classic: Select the **Settings** menu, then **Channels > Web portal > Edit**.
2. In the **Search** section, set the slider to weight your search results to either agent created or end-user created content. You can also set this to 'neutral' (1:1) so that neither is weighted and search results are based only on search keyword relevance.



Setting the ratio to favor agent created content by 4:1, for example, means the agent created content is four times more relevant than end-user created content.

You can choose from the following boosting options:

- **Agents** or **End-users** - Selecting either of these options means that those topics are returned first in search results. For example, if you select **Agent**, all topics created by agents are shown first, followed by any relevant topics created by your end-users.
 - **10:1** - Search results are boosted by a ratio of 10:1
 - **4:1** - Search results are boosted by a ratio of 4:1
 - **2:1** - Search results are boosted by a ratio of 2:1
 - **1:1** - Neither agent created nor end-user created topics are boosted; all search results are based on search keyword relevance and any search optimization (such as tags or phrases) you added to individual topics.
3. Set the slider to the desired boosting ratio and then click the **Save** button.

Once you've set this up, you can monitor the effect over time by evaluating your search activity using search analytics. See [Analyzing knowledge base search activity](#).

Boosting a topic's search relevance with phrases (Enterprise only)

In the Enterprise version of Zendesk, you have an additional tool for boosting topics to the top of your search results. This feature, referred to as *topic boosting*, allows you to add relevant search phrases to your topics. Used in tandem with search analytics, you can first see what your users are searching for and then add those search words and phrases to your topics to push them higher up in search results. For more information on search analytics, see [Analyzing knowledge base search activity](#).

Imagine that you have a Web portal with lots of both agent generated and end-user generated content. You've created a password FAQ that describes how to recover or reset passwords and you want that topic to be listed first in search results. You'd probably add tags like `password` and `reset` and so on to the topic. Your users of course may be using different and perhaps more specific search query phrases such as: "lost password", "reset password", "change password", "password reset", "password new", "password recover", etc. By adding these search query phrases to the topic itself, you dramatically boost its search relevance for users who enter the exact phrase in their search.

Tags Use tags to relate this topic with other topics. Our search engine treats tags just like any other word in the topic.

password × reset × change ×

Phrases Use phrases to boost this topic's search relevance for a query that matches one or more of the phrases below.

change password × reset password × lost password × password reset × password new ×
password recover × how do i reset my password? × login help × can't log in ×

Using search phrases is a good way to account for variations and ensure that your users are finding the correct answers in their searches.

In the Enterprise version of Zendesk, there's no administrative setting to enable topic boosting. It's added as part of the Enterprise plan.

To add topic boosting phrases to a forum topic

1. Access your Web portal and create a new or select an existing topic.
2. Click the **Edit** link in the topic.
3. Add words or phrases to the topic in the **Phrases** section, which is just below tags, then press **Enter**.
4. Save the topic.

Best practices for finding customer issues to start your knowledge base

A knowledge base (KB) is an invaluable resource for your customers. It's the self-service component of your support offering that enables customers to solve their own problems. And the best part is ticket deflection. Customers who can find answers for themselves should file fewer tickets.

Starting your KB can be a daunting task. You need to decide what topics to document to help the most customers:

- Find common issues. "Users always struggle with X."
- Find frequently asked questions (FAQs). "Users always ask Y."
- Find known issues that impact a lot of customers. "Your product does not work in IE 7."
- Find time-consuming issues. "It takes 30 minutes to set up."

The best way to do this is to analyze your tickets. They are the best record of your customer issues and pain points. But don't forget about other resources that might also help you pinpoint issues you should document. Check out macros, tags, existing content, and consult your community.

All of these resources will help you find the common issues that impact a lot of customers. Then you can start building your KB.

Analyzing ticket data to determine customer issues

When you want to start a knowledge base, it's essential to mine your tickets for common issues and customer pain points. This can be a fairly manual process. Think about the data you're capturing in tickets and how you can use it to determine where you need content.

Here's one process for analyzing tickets:

- 1. Categorize your tickets.** How you categorize your tickets depends on the information you're collecting in tickets. Ideally, you'll want to categorize by issue. But use whatever you've got as a starting point for grouping tickets.
- 2. Drill-down into ticket groupings to find common issues.** After you organize your tickets into categories, you'll want to dig in to the categories with the most tickets and find the common, high frequency issues.
- 3. Determine what to document.** Keep a tracking document where you can record issues you find, then determine what you want to document and set priorities for creating the content.

Categorizing your tickets

The first step in analyzing ticket data to determine content needs for your KB is to categorize your tickets.

Your ticket categories depend on the data you're collecting in your tickets. Take a look at the custom fields you've set up to collect extra information. Hopefully you're capturing some data about your customers, product, or issues that will help you. The best case scenario is that you have data about the major issue in each ticket so that you can easily categorize tickets according to issue.

If you are not capturing the issue for each ticket, think about the other data you capture in tickets. For example, if you have multiple products (Game ABC, Game XYZ, and so on) or different user segments (novice, professional, developer, and so on), do you have a custom field for those items?

Or do you have a drop-down for selecting the feature related to the problem, such as "Drawing tool" or "Exporting?"

Note: If you are not currently capturing data that you can use to categorize tickets, set up a custom field where agents can indicate the issue for each ticket. For more information, see [Adding and using custom ticket fields](#).

Your ticket volume and the number of issues you have will determine how long you need to wait before you have a statistically significant distribution of issues. Collect 500 tickets with the new custom field, then take a look. If some of the categories seem light (fewer than 30 tickets), you might want to wait a little longer, until you have 500-1000 tickets maybe. (Also, consider whether you really need those light categories. You might rethink the options in your custom field.)

At Zendesk, we have a custom field called **About** that contains common ticket topics like "Multibranding" or "Salesforce". Agents use this field to indicate the issue for each ticket. We also have a custom field called **Handle Time** to track the amount of time an agent spends handling a ticket. By comparing About and Handle Time, we identify topics that require a lot of time for our agents to handle. Then we can drill down to find common issues that we can document in our KB.

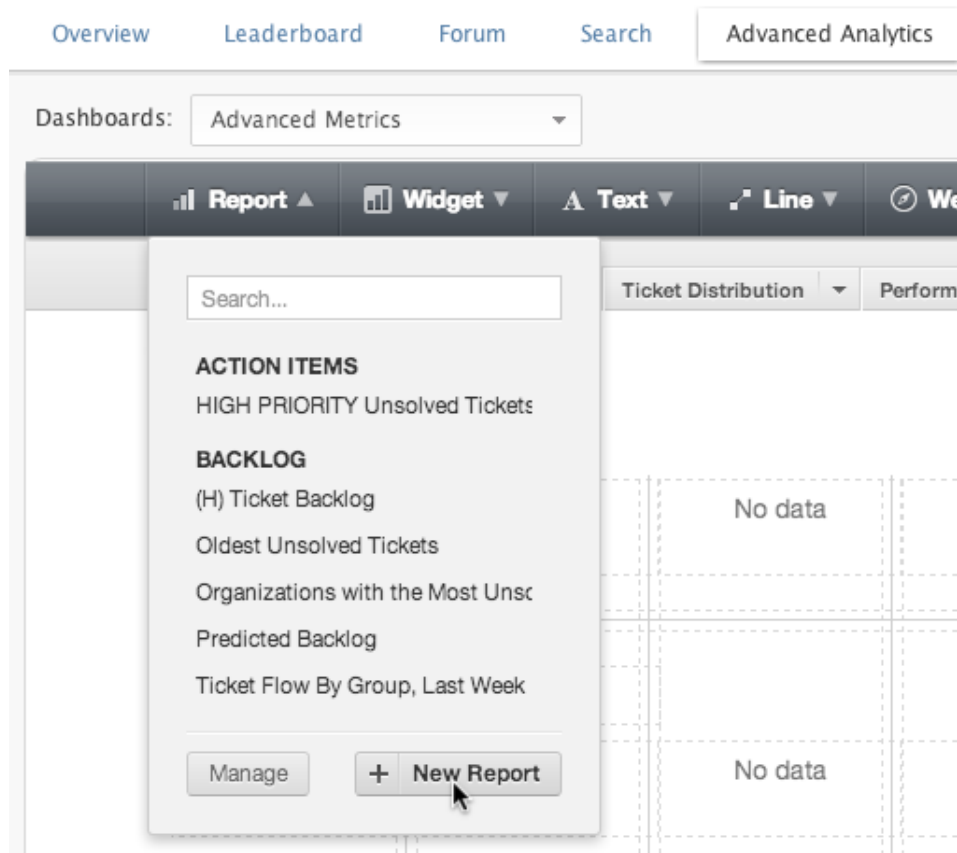
Let's look at how you'd build a report to categorize tickets based on a custom drop-down field or based on a tag.

To create your report based on a custom field

1. Click the **Reporting** icon () in the sidebar, then click the **Advanced Analytics** tab.

Note: If you have not set up Advanced Analytics, see [Setting up Advanced Analytics](#) to complete the setup. Advanced Analytics is available to Plus and Enterprise customers in the new version of Zendesk (not Zendesk Classic). You must be an administrator or have permission to view reports to use Advanced Analytics.

2. Log in to GoodData.
3. Click the **Edit** pencil icon in the upper-right of your dashboard.
4. Click the **Reports** tab, then click **New report**.



For more information about creating reports, see [How to create reports in GoodData](#) on the GoodData website.

5. Click **What**.
6. Select **Tickets** in the first column and **#tickets** in the second column, then click **Done**.
7. Click **How**.
8. Select **Tickets** in the first column, then select your custom field in the second column.

The screenshot shows the Zendesk filter configuration interface. At the top, there are three tabs: 'What (1)', 'How (1)', and 'Filter'. Below these, there are three main sections: 'View by', 'Attributes', and 'Detail'.

- View by:** A dropdown menu with 'Folders' selected.
- Attributes:** A list of attributes with checkboxes. The 'Type of Camera [list]' attribute is selected and highlighted in yellow. Other attributes include 'Initially assigned at...', 'Model # [list]', 'Organization', 'Priority', 'Requester', 'Requester Domain', 'Satisfaction Score', 'Solved at Hour', 'Status', 'Subject', 'Submitter', 'Ticket Id', 'Ticket Type', 'Updated at Hour', and 'Via'.
- Detail:** A section showing the selected attribute 'Type of Camera [list]' and a link to 'Filter This Attribute'.

At the bottom of the interface, there are two buttons: 'Cancel' and 'Done'.

9. In the **Details** column, click **Filter this attribute** so that you can remove some meaningless attributes.

10. Select **Isn't**, then select **empty value** and the **hyphen (-)**.

The screenshot shows the Zendesk report filter configuration interface. At the top, there are tabs for 'What (1)', 'How (1)', and 'Filter'. Below these are icons for various report views. The main interface is divided into three sections:

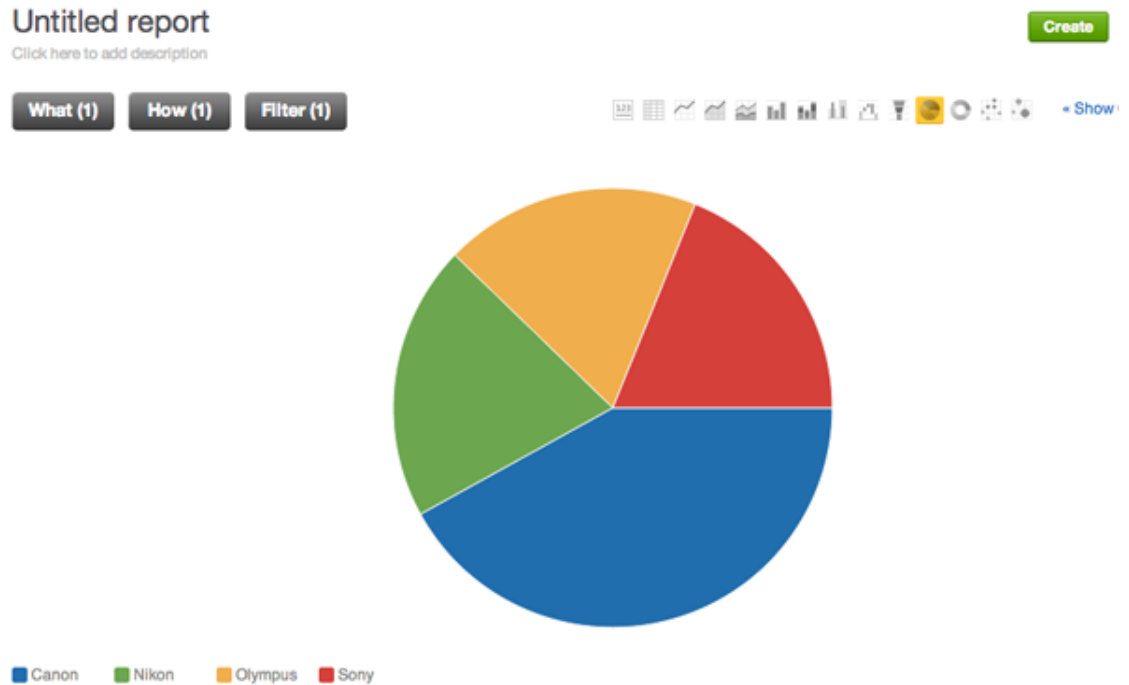
- View by:** A dropdown menu showing 'Folders'.
- Attributes:** A list of attributes with checkboxes. 'Type of Camera [list]' is selected and highlighted in yellow.
- Filter Values:** A search box for values, a dropdown menu showing 'isn't', and a list of values. Two values are checked: '(empty value)' and '-'. The list also includes 'Canon', 'Nikon', 'Olympus', and 'Sony'.

At the bottom right, there are 'Cancel' and 'Done' buttons. The 'Done' button is highlighted in green.

Note: It's a good idea to remove these two attributes because they do not contain any meaningful data for this report. The hyphen (-) means that nothing was selected for the custom field and **empty value** means the ticket was closed before this particular custom field existed.

11. Click **Done** when you're finished.

12. When your report appears, enter a report title, then select a chart-type icon if you want to change the graphical presentation of the report.



13. Click **Create** in the upper-right, then click **Create** again in the dialog box.

Your report appears on the current dashboard.

To create your report based on tags

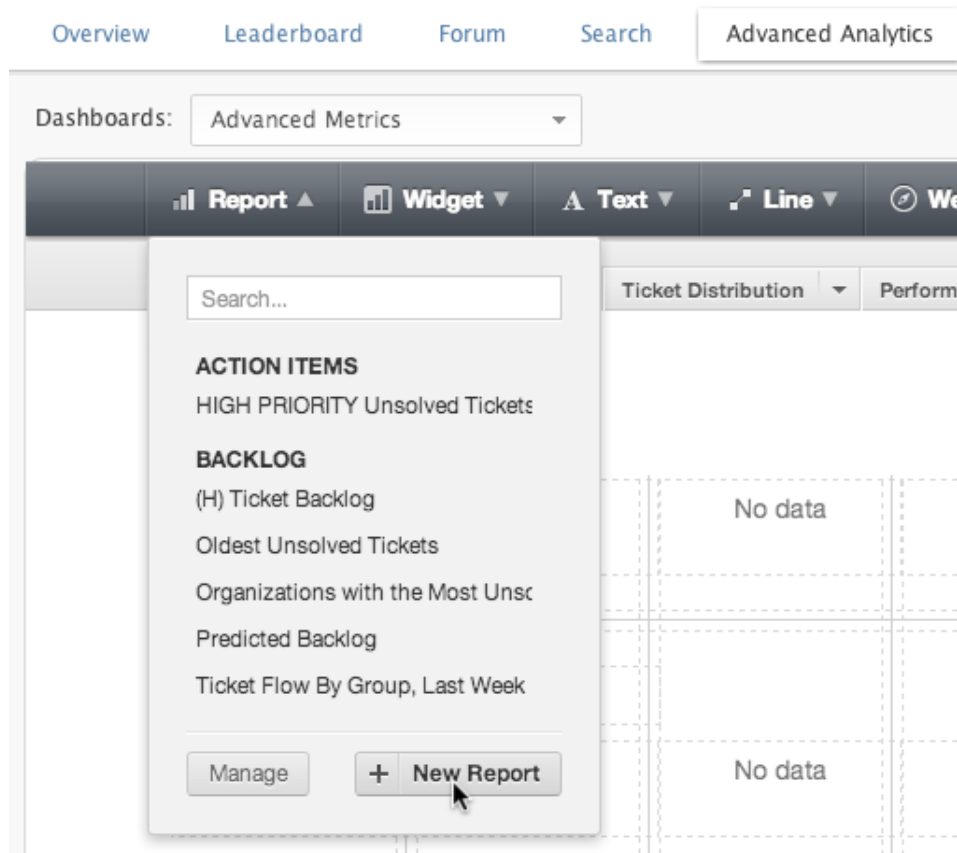
1. Click the **Reporting** icon (📊) in the sidebar, then click the **Advanced Analytics** tab.

Note: If you have not set up Advanced Analytics, see [Setting up Advanced Analytics](#) to complete the setup. Advanced Analytics is available to Plus and Enterprise customers in the new version of Zendesk (not Zendesk Classic). You must be an administrator or have permission to view reports to use Advanced Analytics.

2. Log in to GoodData.

3. Click the **Edit** pencil icon in the upper-right of your dashboard.

4. Click the **Reports** tab, then click **New report**.



For more information about creating reports, see [How to create reports in GoodData](#) on the GoodData website.

5. Click **What**.
6. Select **Tickets** in the first column and **#tickets** in the second column, then click **Done**.
7. Click **How**.
8. Select **Tags** in the first column and **Tag** in the second column.
9. In the **Details** column, click **Filter this attribute**, then select the tags you want to include.

Untitled report

[Click here to add description](#)

The screenshot displays the report configuration interface. At the top, there are three tabs: 'What (1)' (selected), 'How (1)', and 'Filter'. Below the tabs, there are three main sections: 'View by', 'Attributes', and 'Filter Values'. The 'View by' section shows a dropdown menu with 'Folders' selected. The 'Attributes' section has a search bar and a list of attributes, with 'Tag' selected. The 'Filter Values' section has a search bar and a list of values, with 'fstop', 'lens', and 'lenscap' selected. The 'Filter Values' section also shows a dropdown menu with 'is' and a count of 5. At the bottom, there are 'Cancel' and 'Done' buttons.

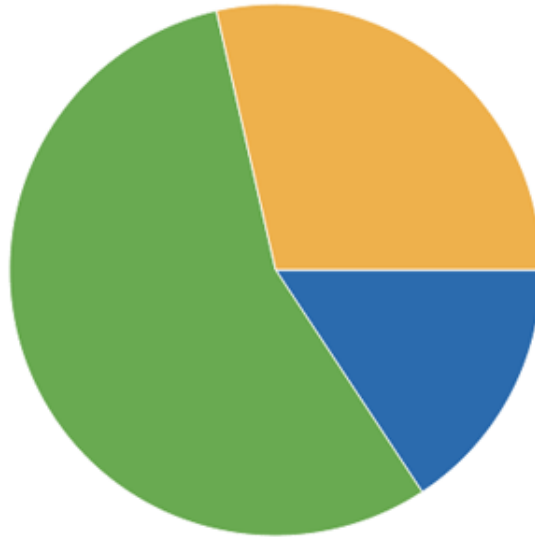
10. Click **Done** when you're finished.

11. When your report appears, enter a report title, then select a chart-type icon if you want to change the graphical presentation of the report.

Tickets by issue type

[Click here to add description](#)

What (1) How (1) Filter (1)



■ battery ■ lens ■ video

12. Click **Create**, then click **Create** again in the dialog box

Your report appears on the current dashboard. You can position it on your dashboard.

Drilling-down to find specific issues

After you categorize your tickets, you can drill-down into each major category to find specific, common issues. To do this, you can create a view of each category. If you have a lot of categories, you might want to start with the ones with the most tickets.

You might be able to find recurring issues by scanning ticket subject lines, but you'll probably have to dig in and read through tickets to pinpoint specifics. This will be a manual process.

To create a view for your ticket categories

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Views**.
Zendesk Classic: Select **Manage > Views**.
2. Click **Add view**.
3. In **Meet all of the following conditions**, add conditions to show tickets tagged with a specific issue.
 - Select **Tags** and **contains at least one of the following**, then enter one of the tags associated with an issue in your About field.
 - Click the **Plus (+)** to add another condition, then select **Status** and **less than Closed**.

Note: If you also want to review closed tickets, you can create another view. There is no way to see all tickets of any status in the same view.

View title

Lens issues

Meet **all** of the following conditions:

Tags Contains at least one of the following

Status

Add condition

Meet **any** of the following conditions:

-- Click to select condition. --

Add condition

4. Select **Preview match for the conditions above** to test your conditions.
5. Set **Formatting options** (see [Setting formatting options](#)).
6. In the **Available for** section, select **Me only** to make this a personal view.
7. Click **Create view**.

Now you are ready to dig in and find specific issues in this grouping that might need to be documented in your KB.

Determining what to document

Establish a system for tracking the recurring issues you find during your ticket analysis.

A google doc or a spreadsheet that you share with others who might helping with the research, will probably work well. Later, you can use this document as a tracking sheet that you can update as you add items to your knowledge base. And you can also use it to make assignments where content needs to be developed.

As you drill-down into tickets in the view for a particular issue, you might find that some issues you thought were common are not actually common enough to document. And maybe some recurring issues don't lend themselves to documentation because there too many variables in customer's environment. Your spreadsheet will evolve throughout your analysis phase as you add and remove issues as needed.

Looking at other sources to determine customer issues

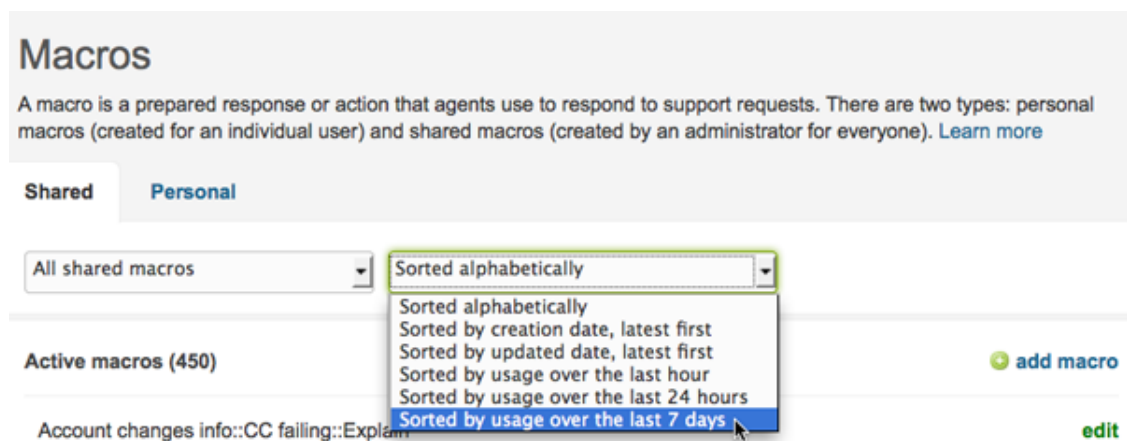
Your tickets will probably be your best resource for finding common customer issues and determining what to put in your knowledge base. But don't overlook other valuable resources that might not take as much time and analysis. Here are some things to consider.

Review popular macros

If you use macros for common responses to tickets, you might want to take a look at your most used macros. You will probably find some common customer pain points in those macros. And you might be able to reduce tickets, and specifically tickets that get these popular macros, if you document the topics covered in those macros in your knowledge base.

To review your most-used macros

1. Click the **Manage** icon (⚙️), then select **Macros**.
Zendesk Classic: Select **Manage > Macros**.
2. Select **Sorted by usage over the last 7 days** (or over the last 24 hours, if you prefer).



3. Review the list of most used macros to find issues.

Look at the most-used tags

The tags on tickets can also help you categorize tickets and find common issues. We've already talked about analyzing tags set by drop-down custom fields. You can also use other tags to help pinpoint common issues.

Take a look at your tag cloud to see the 100 tags that have been most applied to tickets in the last 30 days. This might give you some ideas about different groupings or issues where you can drill-down.

Or, better yet, if you have system for manually tagging items that need documentation, then you can review those to find important items to document. But that's probably something you will *start* doing, but haven't been doing yet!

At Zendesk, when we set up our internal knowledge base, we relied on the tags set by our custom fields. But we plan to start manually a tag for doc_needed as another way to surface topics that need to be documented.

To view the top 100 tag cloud

- Click the **Manage** icon (⚙️) in the sidebar, then select **Tags**.

Zendesk Classic: Select the **Manage** menu, then select **Tags**.

Review existing content

You should not overlook any existing content. This can be another source for determining issues and seeding your knowledge base. And in most cases, it's ready-made content that can go directly in the knowledge base with little or no editing.

Take a look at the following:

- **Informal documentation** Support agents usually have "cheatsheets" or informal docs to help them remember common issues and workarounds. They might be in the form of Word docs or Google docs. Sometimes they are even shared or part of an informal documentation process. Be sure to ask your agents about these docs, if you don't already know about them.
- **Macros** Any macros that cover known issues and workarounds can also be a good resource. Leverage that content to create knowledge base topics. In most cases it's an easy win.
- **Help content** If you have Help documentation, review the topics that are covered and consider features that might cause problems or confusion for users. Proactively document those items. And don't forget to document known issues for features and common workaround or tricks.

Listen to your community

Be sure to listen to your internal community of agents and your external community of customers. It's a great way to directly learn about common customer issues and painpoints.

- **Consult your agents.** Your agents can probably tell you common issues or pain points, and exactly what the doc needs are. Be sure to meet with them to solicit their feedback on needed documentation.

Ideally, this would become part of your regular process for knowledge management. Encourage your team to suggest new documents and, ideally, involve them in content creation as well.

- **Read your community forums.** If you have community forums, then this can be a good source of information for determining common issues and pain points.

Check the most active threads for possible points of confusion. If customers are commenting a lot, it might a source of frustration that needs documentation. You can also search, if you have an idea of what to search for. Maybe you have an issue in mind and want to see how frequently customer discuss it in the forums or maybe you want to validate findings from your ticket analysis (or check gut instinct!).

To help you group customer issues in the forums, you can apply tags to topics. This can be useful in a two-faced approach where you do one pass through topics to skim issue and apply tags, then you do another pass where you sort by tags and drill-down to find commonalities. The tag cloud does not include tags commonly applied to forum topics (only tickets). So keep a list of tags you're applying to topics so that you can search for them later.

- **Check social media.** Go everywhere your customers are and find out what they are saying. You might hear about some common issues.

Best practices for driving traffic to your forums and knowledge base

The best way to increase awareness about your forums and knowledge base (KB) and drive traffic is to link to them anywhere and everywhere you can--especially where your customers are.

Your agents can help you do this. As they answer tickets each day, and interact with customers, they can link to content. This will make customers aware that the content exists, and train them to look there first next time before filing a ticket.

There are other places in your Zendesk, besides tickets, where you can add links to the top-level of your forums or KB or to specific content. And there are also opportunities outside of your Zendesk to add links. Don't miss out on these opportunities to enable your customers to self-serve.

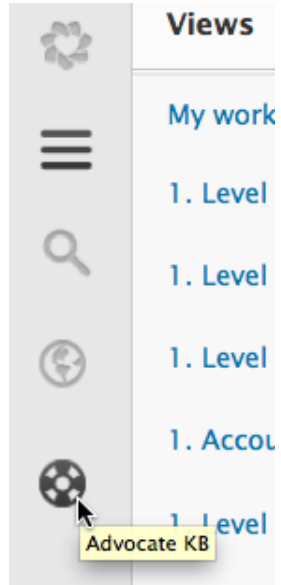
Note: Thanks to the contributors to this article: Sean Kinney of Zendesk, Katie Wilcox, [Allen Lai](#), of [Bitcasa Todd Zabel](#) of [Hearsay Social](#), and Andrew of BizStudio NZ.

Starting with your agents

Agents can be key to increasing awareness of your knowledge base and forums and training customers to go there to self-serve.

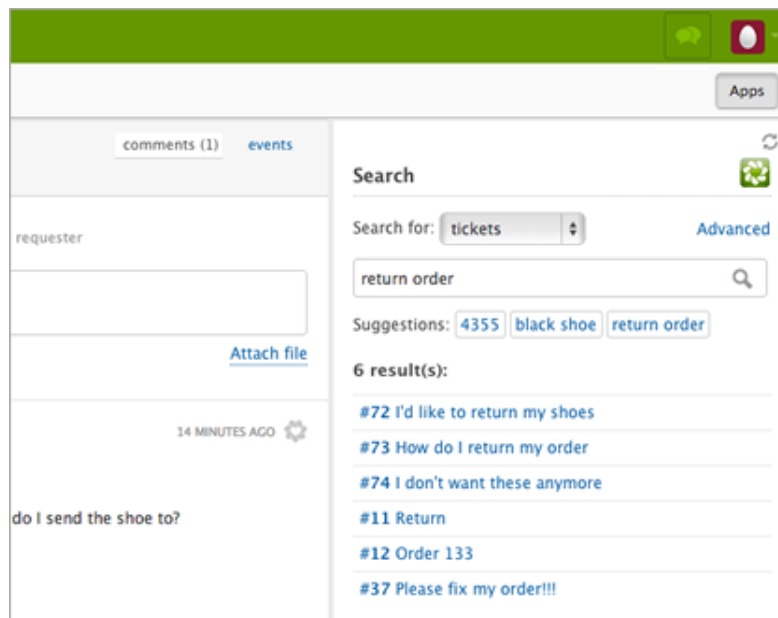
- **Introduce new agents to existing content.** When you train new agents make sure they know about your knowledge base and encourage them to get familiar with the content there. They should have a good idea of what's documented and be able to easily point users to it.
- **Keep agents informed about new content and updates.** Develop a system for letting agents know when new or updated content is available. Then they will be more likely to use it and link to it. One way to do this is to create a private forum where you announce doc updates and ask agents to subscribe.
- **Establish a process for linking to content.** Train agents to search for content and include links in tickets as part of each support interaction. Even when an agent knows the answer, if it's covered in a doc, it's a good idea to include a link along with the answer. This way customers learn that content is available and they might search for answers themselves next time. Agents can also include links to related content, too, when solving tickets as a way of increasing KB awareness.
- **Provide easy access to the forums.** The less time it takes agents to go to the forums and find content, the more likely they are to do it. You can add an icon for your KB in the sidebar of your Zendesk to provide quick access.

For information, see [Sidebar and Text apps for the new Zendesk](#).



- **Provide forum search in the ticket page.** Again, the easier it is for agents to find content the more likely they are to link to it. You can add search to the ticket page so that agents can easily search for articles, tickets, comments, users, or organizations in your Zendesk.

For more information, see [Installing and using the Sidebar Search app](#).



Linking to forums in your Zendesk

There are many places within your Zendesk where you can link to the top-level of your forums or knowledge base or to individual articles.

Where	How	More info
Agent signatures (in public ticket comments and outgoing emails)	An administrator can add a common signature for all agents that includes a link to your forums or KB. Or an agent can add a personalized signature that includes a link.	For information, see Adding agent signatures .
Reusable responses in tickets (macros)	Create or edit macros to include a link to your forums, KB, or a specific article.	For information about creating and editing macros, see Using macros to update and add comments to tickets .
Ticket comments	Agents can manually link to content in ticket comments to answer a question. They can also include links to related articles when answering tickets.	To insert a link in a ticket comment, copy and paste the link in the comment area.
Auto-response emails for received requests	<p>Edit the Notify requester of received request trigger to add a link to your forums or KB.</p> <p>For example: "While you're waiting, check out our Help Center! There you will find answers to common questions and issues, FAQs, a community forum, and more!"</p>	For information about editing triggers, see Editing and cloning triggers .
Auto-response emails for solved requests	<p>Edit the Notify requester of solved request trigger to add a link to your forums or KB.</p> <p>For example: "Your ticket has been solved! To reopen this request, reply to this email or click the link. And for more help, be sure to check out our Help Center for answers to common questions and issues, FAQs, a community forum, and more!"</p> <p>Another option is to clone the trigger for solved requests to create different versions for different major support issues. Then include links to specific, related content for each issue in the trigger. Agents can select</p>	For information about editing and cloning triggers, see Editing and cloning triggers .

Where	How	More info
	<p>the issue in a custom ticket fields to fire the appropriate trigger.</p> <p>For example, "Your ticket about installation has been solved! If you need more help, see the Installation section in our Help Center!"</p>	
Pinned topics on support home page	You can surface content and increase awareness by pinning articles to your support home page and rotating content.	For more information, see Pinning forum topics to your Web portal .
Hot Topics widget and Related Topics widget (Zendesk Classic only)	<p>Use the Hot Topics widget to display the most popular forums content, according to number of comments, in your forums.</p> <p>Use the Related Topics widget to suggest related forums content in a ticket or forum post. You can determine whether to display Related Topics for agents, end-users, logged in users, or everybody.</p>	To insert one of these widgets, select Settings > Extensions , then click Add widget and locate the appropriate widget.

Linking to forums and KB outside of your Zendesk

There are opportunities outside of your Zendesk to drive traffic to your forums and knowledge base.

Where	What
Company website	<p>Top-level menu option for Forums or knowledge base</p> <p>Dedicated page on website with links to articles</p> <p>Links to articles on company Intranet</p> <p>Blog posts that link to forum articles</p>
Social media	<p>Feedback tab (with search) on Facebook page</p> <p>See Adding the Feedback tab to your Facebook page.</p> <p>Links to articles and videos in social media, including Facebook, Google+, Twitter, and YouTube channel</p>

Where	What
Product	<p>Links to articles in product. For example, include a <i>How do I use this feature?</i> link to context-sensitive KB topics.</p> <p>Community Tip from Tom Corbett! We have an in app assistance icon, this actually pulls in forum articles using the API which relates to the page you are on. We have found people prefer this experience.</p> <p>Link to top-level of the forums or KB or to specific articles in the sign-up and login workflows</p> <p>Knowledge base search in product (using the Zendesk API)</p>
Customer outreach	<p>Link to top-level of the forums or KB in the footer of emails to customers</p> <p>Link to top-level of the forums or to specific articles in email to customers</p> <p>For example, welcome emails and follow-up emails after events or webinars.</p> <p>Link to top-level of the forums or KB or to specific articles in your regular newsletter</p> <p>Links to KB articles in your training and user guides presented to customers</p>

Chapter 10

Searching the data in your Zendesk

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

Zendesk search reference

In addition to full text search, you can search using common search operators combined with data property keywords and values to narrow your search results. This reference describes how to search for the data in your Zendesk.

First, essential facts about searching the data in your Zendesk:

- **How soon can new data be searched?**

When you add new data to your Zendesk, 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?**

Administrators can search all the data in your Zendesk. Agents can search the ticket, user, and forums data that 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 24: Search operators

Operator	Description
:	The colon indicates that the given field should equal the specified value. <code>status:open</code>
<	Less than. <code>status<closed</code>
>	Greater than. <code>priority>normal</code>
" "	Double quotes. This is referred to as a phrase search and returns the exact words in the exact order. <code>subject:"Please upgrade my account"</code>
-	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: <code>status:pending upgrade -account</code>
+	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: <code>+upgrade +account</code> 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 <code>photo*</code> 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. <code>subject:photo*</code>

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 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 organization: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 your Zendesk 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 25: 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"
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

Keyword	Description
requester	The ticket requester. <code>requester:amy@mondocam.com</code>
subject	The text in the ticket's subject. <code>subject:"upgrade account"</code>
description	The text in all the ticket's comments. <code>description:defective</code>
status	New, Open, Pending, On-hold, Solved, Closed. <code>status<closed</code>
ticket_type	Question, Incident, Problem, Task. <code>ticket_type:problem</code>
priority	Low, Normal, High, Urgent. <code>priority>low</code>
group	The assigned agent's group name. <code>group:"Level 2"</code>
organization	The name of the ticket requester's organization. <code>organization:customers</code>
tags	Tags that have been added to the ticket. <code>status:pending tags:premium</code>
via	The ticket's source, which can be any of the following: <ul style="list-style-type: none"> • mail (from an email message) • get_satisfaction, get_sat, "get satisfaction" (from Get Satisfaction) • dropbox (from the Zendesk Feedback Tab) • 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_call_outbound (from an outbound phone call) • phone (from voicemail or an inbound call) • sms, text, "text message" (from a text message)

Keyword	Description
	<ul style="list-style-type: none"> logmein, logmein_rescue, "logmein rescue" (from LogMeIn)
	<code>via:phone</code>
commenter	People who have added comments to tickets.
	<code>commenter:"Mike"</code>
	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.
	<code>cc:amanda@mondocam.com</code>
	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 26: User property keywords

Keyword	Description
name	The user's partial or full name.
	<code>type:user name:"alex anderson"</code>
email	The user's email address.
	<code>type:user email:alex@mondocam.com</code>
	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.
	<code>type:user group:"Level 2"</code>
organization	The user's organization name.

Keyword	Description
	<code>type:user organization:mondocam</code>
created	The date the user was added to your Zendesk. <code>type:user created<2011-05-01</code>
notes	All text in the notes field in the user's profile. <code>type:user notes:"manager"</code>
details	All text in the details field in the user's profile. <code>type:user details:"madison, wi"</code>
external_id	The user's external ID, if used. <code>type:user external_id:0098884412</code>
phone	The user's phone number. You must search for the number exactly as it was originally entered into the user's account. <code>type:user phone:555-111-2222</code>
tags	Tags that have been added to the user's profile. <code>type:user tags:premium tags:wholesale</code> 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 27: Organization property keywords

Keyword	Description
name	The user's partial or full name. <code>type:organization name:mondocam</code>
created	The date the organization was added. <code>type:organization created<2011-05-01</code>
notes	All text in the notes field in the user's profile. <code>type:organization notes:EMEA</code>
details	All text in the details field in the user's profile. <code>type:user details:information</code>

Keyword	Description
	<code>type:organization details:london</code>
tags	Tags that have been added to the organization.
	<code>type:organization tags:premium</code>
	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 28: Group property keywords

Keyword	Description
name	The group's name.
	<code>type:group name:"level 2"</code>
created	The date the group was added.
	<code>type:group created<2011-05-01</code>

Searchable satisfaction rating keywords

To search for tickets by customer satisfaction status and rating, you need to use the `type` keyword. See [Using the type keyword](#). For more information on customer satisfaction, see [Using customer satisfaction rating](#).

Table 29: Satisfaction rating keywords

Keyword	Description
bad	Tickets that have been rated 'bad'.
	<code>type:ticket satisfaction:bad</code>
badwithcomment	Tickets that have been rated 'bad' that also include a comment from the ticket requester.
	<code>type:ticket satisfaction:badwithcomment</code>
good	Tickets that have been rated 'good'.
	<code>type:ticket satisfaction:good</code>
goodwithcomment	Tickets that have been rated 'good' that also include a comment from the ticket requester.
	<code>type:ticket satisfaction:goodwithcomment</code>

Keyword	Description
offered	<p>When you request a customer satisfaction rating, the ticket satisfaction rating status is set to 'offered'. The following notification is added to the ticket: Customer satisfaction feedback was offered. This means that you've asked for but not yet received a response to the rating request.</p> <pre>type:ticket satisfaction:offered</pre>

Searching for ticket attachments (files and screencasts)

You have the following options for searching for ticket attachments. These include files as well as screencasts (see [Adding a screencast to a ticket or forum topic](#) in the Zendesk Agent Guide).

Table 30: Ticket attachment keywords

Keyword	Description
has_attachment	<p>You use this keyword to search for tickets that either do or not contain file attachments. There are two valid values for this keyword: true and false.</p> <pre>has_attachment:true</pre> <pre>has_attachment:false</pre>
attachment_name	<p>You can also search for a file attachment by name.</p> <pre>attachment_name:image001.jpg</pre>
has_screencast	<p>Like the has_attachment keyword, the has_screencast keyword can either be true or false. Screencasts is an optional feature in Zendesk that you must enable to use (see Enabling screencasting in your Zendesk).</p> <pre>has_screencast:true</pre> <pre>has_screencast:false</pre>

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 in the **People** page.

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 data in your Zendesk.

```
type:organization tags:premium
```

The user data properties that can be searched are described in the tables below. All of the searchable data in your Zendesk (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 31: User property keywords

Keyword	Description
name	The user's partial or full name. <pre>type:user name:"alex anderson"</pre>
email	The user's email address. <pre>type:user email:alex@mondocam.com</pre> 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. <pre>type:user group:"Level 2"</pre>
organization	The user's organization name. <pre>type:user organization:mondocam</pre>

Keyword	Description
created	The date the user was added to your Zendesk. <code>type:user created<2011-05-01</code>
notes	All text in the notes field in the user's profile. <code>type:user notes:"manager"</code>
details	All text in the details field in the user's profile. <code>type:user details:"madison, wi"</code>
external_id	The user's external ID, if used. <code>type:user external_id:0098884412</code>
phone	The user's phone number. You must search for the number exactly as it was originally entered into the user's account. <code>type:user phone:555-111-2222</code>
tags	Tags that have been added to the user's profile. <code>type:user tags:premium tags:wholesale</code> 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 32: Group property keywords

Keyword	Description
name	The group's name. <code>type:group name:"level 2"</code>
created	The date the group was added. <code>type:group created<2011-05-01</code>

Searching organizations

Here are the organization properties that can be searched.

Table 33: Organization property keywords

Keyword	Description
name	The user's partial or full name. <code>type:organization name:mondocam</code>
created	The date the organization was added. <code>type:organization created<2011-05-01</code>
notes	All text in the notes field in the user's profile. <code>type:organization notes:EMEA</code>
details	All text in the details field in the user's profile. <code>type:user details:information</code> <code>type:organization details:london</code>
tags	Tags that have been added to the organization. <code>type:organization tags:premium</code> For more information about tagging users and organizations, see Adding tags to users and organizations .

Searching tickets

Full text searches return results from all the data in your Zendesk. To search exclusively for ticket data, you can use ticket property keywords.

```
status:open
```

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 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. Administrators and agents can search for tickets using these keywords.

Table 34: 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"
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 .

Keyword	Description
	<code>submitter:me</code>
<code>requester</code>	The ticket requester. <code>requester:amy@mondocam.com</code>
<code>subject</code>	The text in the ticket's subject. <code>subject:"upgrade account"</code>
<code>description</code>	The text in all the ticket's comments. <code>description:defective</code>
<code>status</code>	New, Open, Pending, On-hold, Solved, Closed. <code>status<closed</code>
<code>ticket_type</code>	Question, Incident, Problem, Task. <code>ticket_type:problem</code>
<code>priority</code>	Low, Normal, High, Urgent. <code>priority>low</code>
<code>group</code>	The assigned agent's group name. <code>group:"Level 2"</code>
<code>organization</code>	The name of the ticket requester's organization. <code>organization:customers</code>
<code>tags</code>	Tags that have been added to the ticket. <code>status:pending tags:premium</code>
<code>via</code>	The ticket's source, which can be any of the following: <ul style="list-style-type: none"> • mail (from an email message) • get_satisfaction, get_sat, "get satisfaction" (from Get Satisfaction) • dropbox (from the Zendesk Feedback Tab) • 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_call_outbound (from an outbound phone call) • phone (from voicemail or an inbound call)

Keyword	Description
	<ul style="list-style-type: none"> sms, text, "text message" (from a text message) logmein, logmein_rescue, "logmein rescue" (from LogMeIn)
	<code>via:phone</code>
<code>commenter</code>	People who have added comments to tickets.
	<code>commenter:"Mike"</code>
	You can search by a user's ID, a partial name, full name, and using an email address.
<code>cc</code>	People who have been CC'd on tickets.
	<code>cc:amanda@mondocam.com</code>
	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.

Field options

On the ticket form, users are presented with a dropdown populated with the option titles you define in this section. **The ticket will be tagged accordingly upon submit - use the tag to filter your views, triggers and automations.**

Title: <input type="text" value="Product Question"/>	Tag: <input type="text" value="product_question"/>	
Title: <input type="text" value="Billing Issue"/>	Tag: <input type="text" value="billing_issue"/>	
Title: <input type="text" value="Wholesale Orders"/>	Tag: <input type="text" value="wholesale_orders"/>	
Title: <input type="text" value="Technical Issue"/>	Tag: <input type="text" value="technical_issue"/>	
Title: <input type="text" value="Other"/>	Tag: <input type="text" value="other"/>	
Add tag option		

Sort field options alphabetically by title upon save

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 11

Supporting multiple languages

- *Configuring your Zendesk for your locale and language*
- *Configuring your Zendesk to support multiple languages*
- *Providing multiple language support with dynamic content (Plus and Enterprise)*
- *Exporting and importing dynamic content (Plus and Enterprise)*
- *Detecting an end-user's language from an email message*
- *Appending locale IDs to language restricted forum content URLs*

Configuring your Zendesk 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 Zendesk 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 Zendesk from English to a different language.

If you want to support more than one language, see [Configuring your Zendesk to support multiple languages](#).

Zendesk fully supports UTF-8 (Unicode) and all languages can be added to forms, comments, tags, and so on.

To switch your Zendesk 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](#)
-

Setting your Zendesk time zone and format

You can set the time zone and format for your Zendesk account that corresponds to your locale.

To set your Zendesk time and format

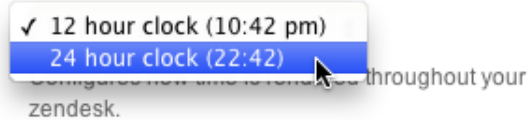
1. Click the **Manage** icon (⚙️) from the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Select the **Localization** tab.

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.



You can also select either the 12-hour or 24-hour time format.

Time Format

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 Zendesk, 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 Zendesk and therefore don't require your end-users to register and log in, they will not receive any of these messages. See [Setting up to provide email-only support](#).

If you're using dynamic content (see [Providing multiple language support with dynamic content](#)), 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 **Agents** settings page, 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 Zendesk accounts choose to add some additional text to the account signature. If you'd like to do the same in your default 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. See [Providing multiple language support with dynamic content](#).

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 Zendesk 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 [Using Liquid markup to support multiple languages in automations, macros, and triggers](#).

In the Plus and Enterprise versions of Zendesk, you can use dynamic content 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. See [Providing multiple language support with dynamic content](#).

Related topics

- [Streamlining workflow with ticket updates and triggers](#)
- [Streamlining workflow with time-based events and automations](#)
- [Using macros to update and add comments to tickets](#) Using macros to update and add comments to tickets

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. Click the **Manage** icon (⚙️) from the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Select the **Localization** tab.
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 the **Web portal** settings page. 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.

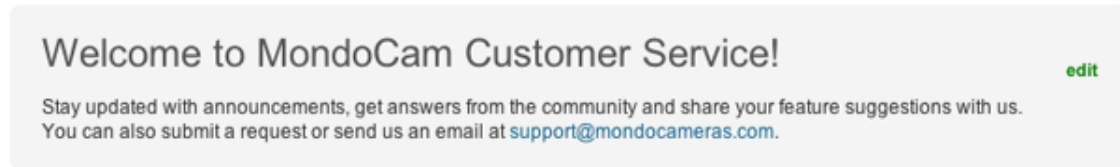
Forums name

The title of your forums as your end-users see it. Default is "Forums". Rename if you want your forums shown as e.g. "Knowledge Base" or "Messages".

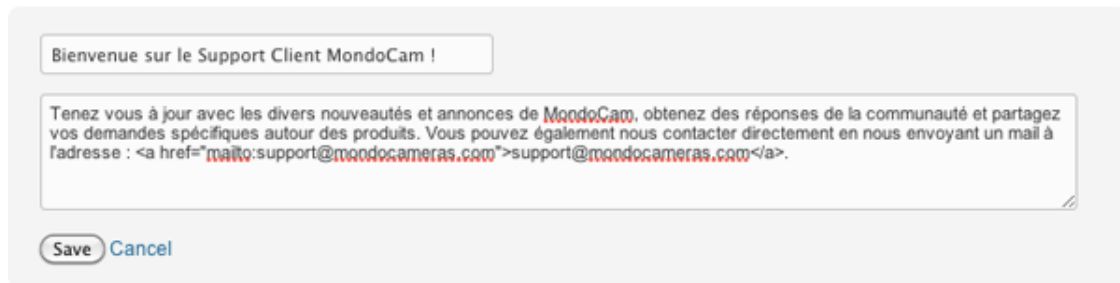
If you use dynamic content, you'd enter the placeholder here instead of text. See [Providing multiple language support with dynamic content](#).

Changing the welcome message on the home page

At the top of your Zendesk home page is a welcome message in English.



You can easily change this text by logging into your Zendesk, 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. See [Providing multiple language support with dynamic content](#).

Creating knowledge base content in your default Zendesk language

You can add any language as content in the forums. Therefore, if you set your default Zendesk 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 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.



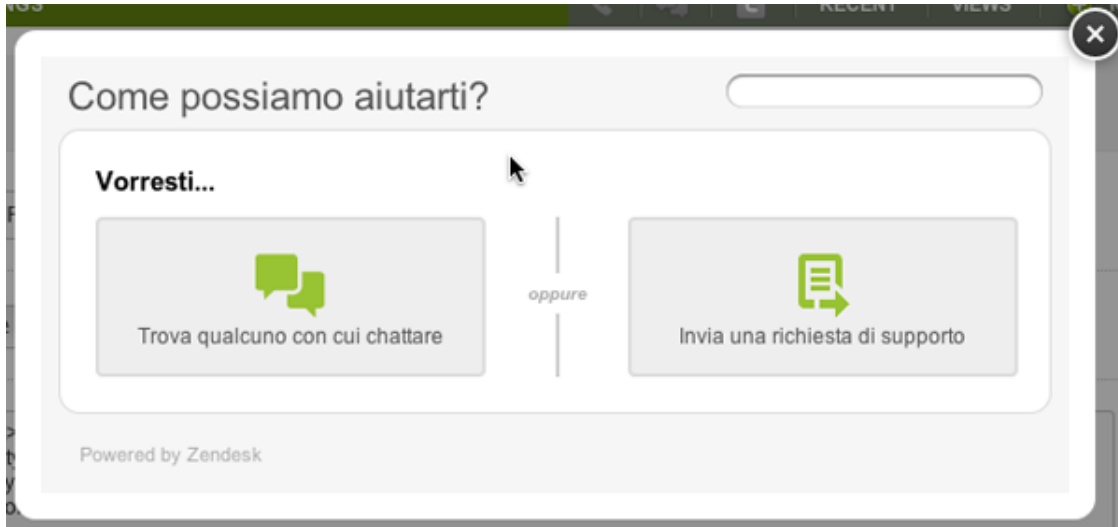
To set the language for a Feedback Tab

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Feedback Tab**.

- Zendesk Classic:** Select the **Setting** menu, then select **Channels > Feedback Tab > Edit**.
2. Select a language.
 3. Click **Preview & grab code snippet**. Follow the instructions for creating a Feedback Tab in [Setting up your Feedback Tab channel](#).

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.

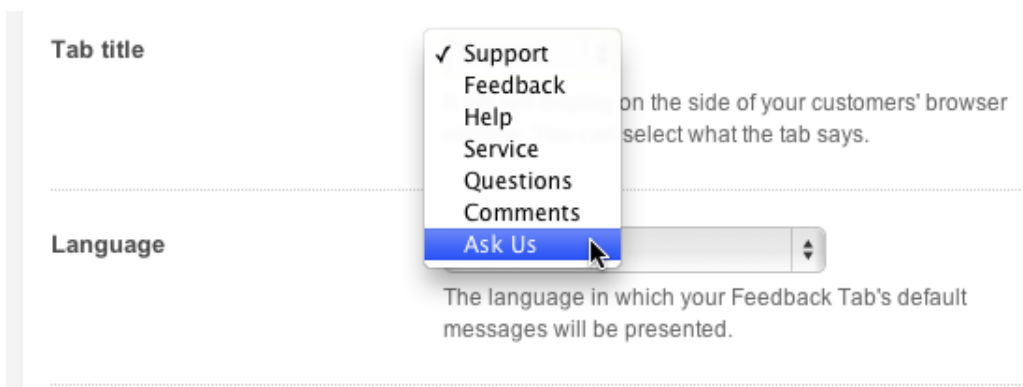
Here's what the Italian version of the Feedback Tab user interface looks like to your end-users:



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.

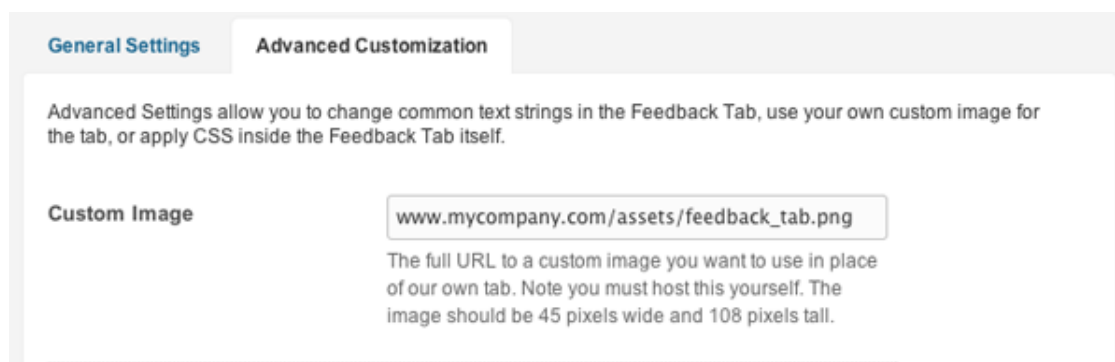
```
<script type="text/JavaScript" src="//asset0.zendesk.com/external/zenbox/v2.4/zenbox.js"></script>
<style type="text/css" media="screen, projection">
  @import url("//asset0.zendesk.com/external/zenbox/v2.4/zenbox.css");
</style>
<script type="text/javascript">
  if (typeof(Zenbox) !== "undefined") {
    Zenbox.init({
      dropboxID: "2830039812",
      url: "https://myaccount.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 of the **Feedback Tab** settings page 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.

Configuring your Zendesk to support multiple languages

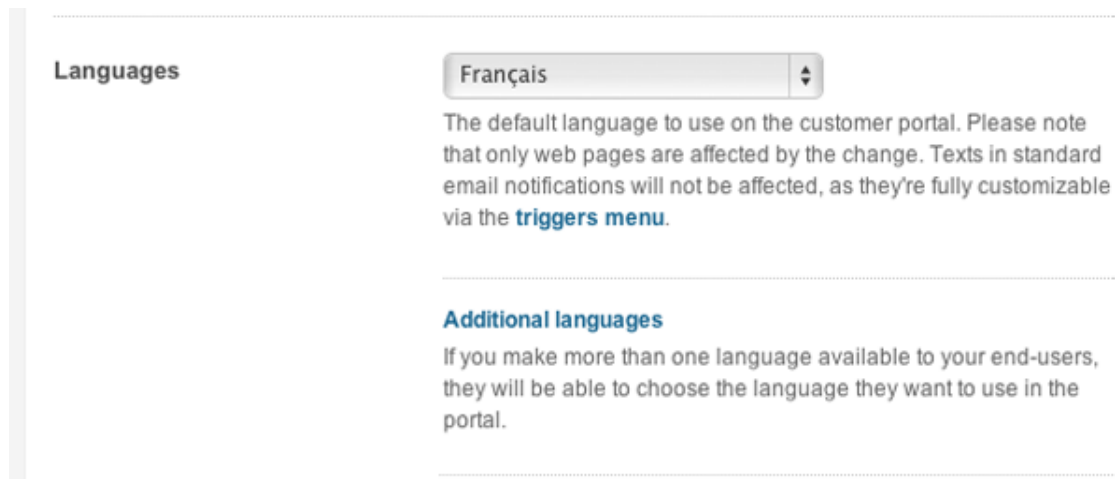
If you support multiple languages, you'll need the Plus or Enterprise versions of Zendesk. These versions of Zendesk allow you to select multiple languages, which are then available to end-users in the Web portal. Your language choices are also used to determine what language is used in system messages 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 [Providing multiple language support with dynamic content](#). 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.



Languages

Français

The default language to use on the customer portal. Please note that only web pages are affected by the change. Texts in standard email notifications will not be affected, as they're fully customizable via the [triggers menu](#).

Additional languages

If you make more than one language available to your end-users, they will be able to choose the language they want to use in the portal.

To change your language settings

1. Click the **Manage** icon (⚙️) from the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Select the **Localization** tab.

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.

Languages

English

The default language to use on the customer portal. Please note that only web pages are affected by the change. Texts in standard email notifications will not be affected, as they're fully customizable via the [triggers menu](#).

<input checked="" type="checkbox"/> English	<input checked="" type="checkbox"/> Deutsch (more info)
<input type="checkbox"/> Español (more info)	<input type="checkbox"/> Português (Brasil) (more info)
<input type="checkbox"/> Français (more info)	<input checked="" type="checkbox"/> Nederlands (Dutch) (more info)
<input type="checkbox"/> Русский (more info)	<input type="checkbox"/> Dansk (more info)
<input checked="" type="checkbox"/> Italiano (more info)	<input type="checkbox"/> Svenska (more info)

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 your Zendesk 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.

Meet **all** of the following conditions:

Requester's language... Is

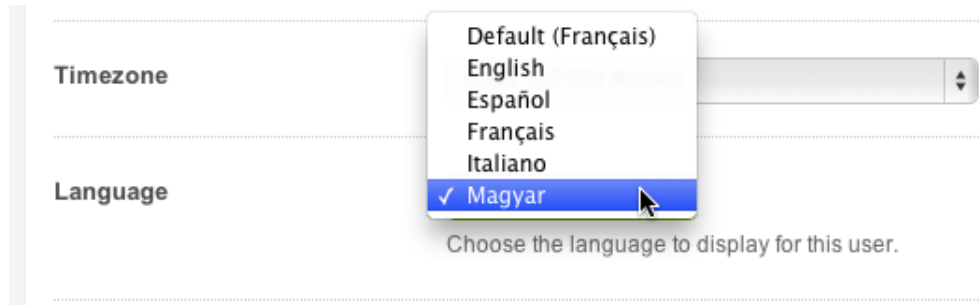
Add condition

English
 Español
 Français
 Italiano
 Magyar

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 the **Localization** tab of the **Account** settings page. 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.
- The language used in a user's email support request can be automatically detected. See [Detecting an end-user's language from their email](#).

For unknown end-users (those who do not yet have an account in your Zendesk 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 Zendesk time zone and format](#)).

Business Hours **Enabled**

Enable business hours to adapt your business rules and reports to your working hours. Business hours are defined in the time zone of your zendesk, as defined above. [Learn more](#).

Enter your support business hours (working hours):

Mon Tue Wed Thu Fri Sat Sun

to

To set your business hours

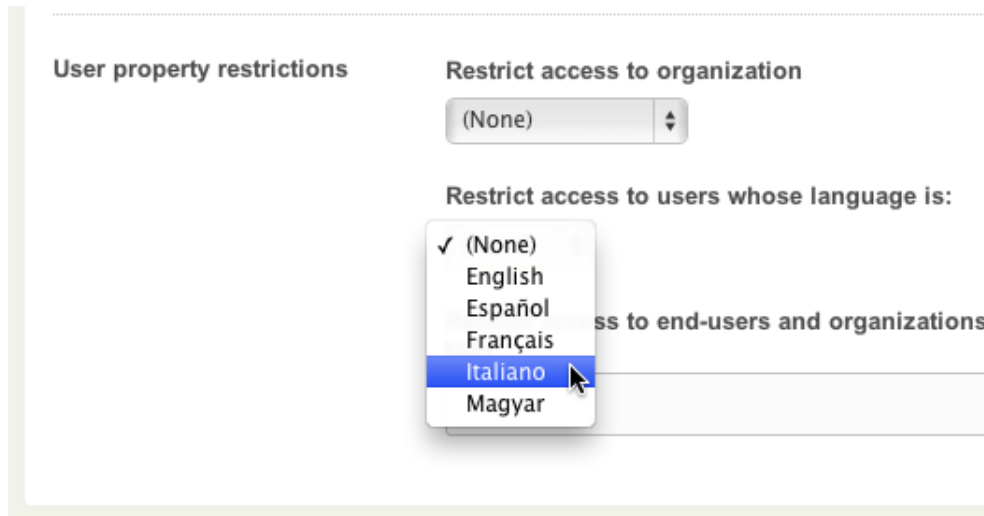
1. Click the **Manage** icon (⚙️) from the sidebar, then select **Account**.
Zendesk Classic: Select the **Settings** menu, then select **Account**.
2. Select the **Localization** tab.
3. Select **Business Hours > Enabled**.
4. Set your business hours by selecting the days of week and hours during the day in which you will provide support.
5. Click **Save** tab.

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 Zendesk.

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 your account localization settings (see [Selecting the languages you want to support](#)).

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.

Although you can't explicitly set a language restriction on a category, setting a language restriction on each of the forums within the category achieves the same outcome. For example, if you wanted to create community forums for each of the languages you support and only allow end-users in those languages to see them, first create a category for each language. Then, add all the forums you want into that category and set the language restriction on each. All of the forums must be restricted to the same 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 Zendesk 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 Zendesk 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 Zendesk 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.

Trigger title

Assign to French group if requester's language is French

Meet **all** of the following conditions:

Ticket is... Created

Requester's language... Is Français

Add condition

Meet **any** of the following conditions:

-- Click to select condition --

Add condition

Perform these actions:

Group French Group

Add action

Delete Update trigger

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.

View title

Italian tickets

Meet **all** of the following conditions:

Status Closed

Requester's language... Italiano

Add condition

You can also make the view visible to agents in a specific group.

Available for

All agents

Agents in group

Me only

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.

Trigger title

Set French end-user's language from support email address

Meet **all** of the following conditions:

Status New

Ticket channel Email

Ticket received at...

Add condition

Meet **any** of the following conditions:

-- Click to select condition --

Add condition

Perform these actions:

Set requester's language to

Add action

Create trigger

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 (Plus and Enterprise)

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 "Help! I don't know what to enter here!" link on the login page.
```

```
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 Zendesk, 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 default language) and variants for every other language that you support. In the example above, the default variant is in English. If your Zendesk 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.

Note: Currently, only text is supported in dynamic content. HTML is not supported.

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 [Setting and detecting a user's language](#).

Of course when you support multiple languages, you must translate your content into the languages you support in your Zendesk. There are a number of ways to manage the translation of your default content. You can create and edit all your language variants directly in your Zendesk 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 Zendesk and all language variants are added.

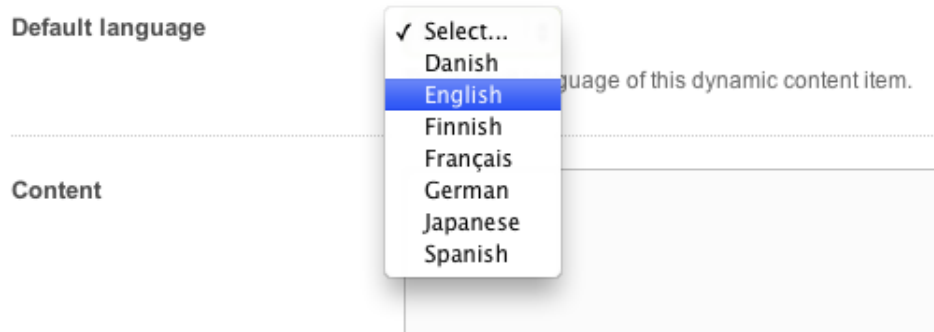
If you later update the default content, the variants are flagged as being potentially out of date with the default content. Meaning that if you update the default content you probably need to also update the translations in the variants. When an update is required, you simply repeat the export and import 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 language and the additional languages you've chosen to support in the **Localization** settings page. You can add language variants for all of the languages that are supported in Zendesk.

To create a dynamic content item

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Dynamic Content**.
 - Zendesk Classic:** Select the **Manage** menu, then select **Dynamic Content**.
2. Click **Add item**.
3. Enter a title for the dynamic content.
4. Select the default language.
5. 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.
6. 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.

Dynamic content / Password help edit

Placeholder: {{dc.password_help}}

Variants (1) add variant

Language	Content	Status	
English	If you forget your password, just click the login link in the upper right cor...	Active	edit

References (0)

Macros (None)

Triggers (None)

Automations (None)

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 the **Localization** settings page.
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.

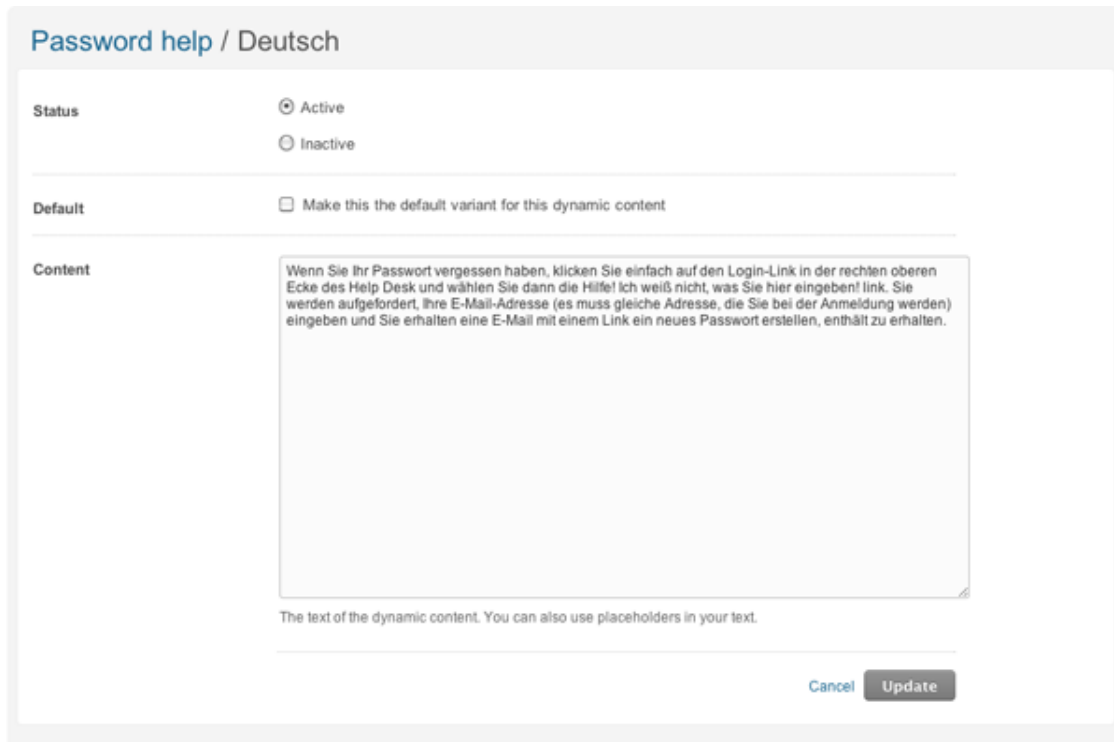
Setting a language variant as the default variant is useful when you want to create dynamic content specifically for a group that supports a language other than your default language. For example, a Japanese language support group can set default variants as Japanese. When you change the default from 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 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 Zendesk supports. You then import the files back into your Zendesk 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](#).

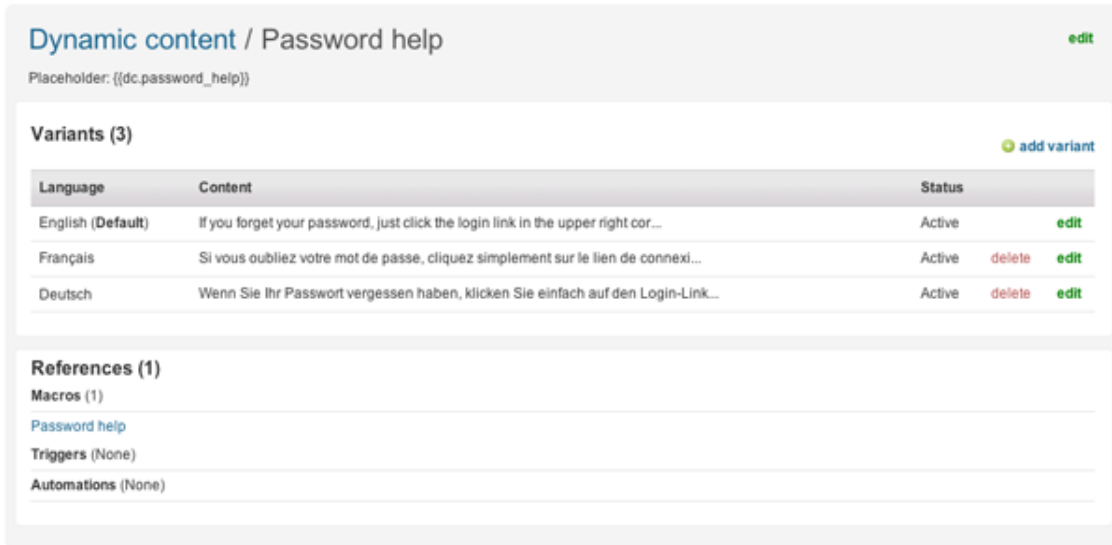
6. Click **Create**.

Here's an example of the password help dynamic content variant in German (translation courtesy of Google Translate).



The screenshot shows the 'Password help / Deutsch' configuration page. It features three sections: 'Status' with radio buttons for 'Active' (selected) and 'Inactive'; 'Default' with a checkbox for 'Make this the default variant for this dynamic content' (unchecked); and 'Content' with a text area containing German text: 'Wenn Sie Ihr Passwort vergessen haben, klicken Sie einfach auf den Login-Link in der rechten oberen Ecke des Help Desk und wählen Sie dann die Hilfe! Ich weiß nicht, was Sie hier eingeben! link. Sie werden aufgefordert, Ihre E-Mail-Adresse (es muss gleiche Adresse, die Sie bei der Anmeldung werden) eingeben und Sie erhalten eine E-Mail mit einem Link ein neues Passwort erstellen, enthält zu erhalten.' Below the text area is a note: 'The text of the dynamic content. You can also use placeholders in your text.' At the bottom right are 'Cancel' and 'Update' buttons.

When you add variants, they are listed as shown here:



Dynamic content / Password help edit

Placeholder: {{dc.password_help}}

Variants (3) add variant

Language	Content	Status
English (Default)	If you forget your password, just click the login link in the upper right cor...	Active edit
Français	Si vous oubliez votre mot de passe, cliquez simplement sur le lien de connexi...	Active delete edit
Deutsch	Wenn Sie Ihr Passwort vergessen haben, klicken Sie einfach auf den Login-Link...	Active delete edit

References (1)

Macros (1)

Password help

Triggers (None)

Automations (None)

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.

Dynamic content

All - Category - [add item](#)

Title	Last Update	Status
Automation::Customer Satisfaction Rating - Content	about 1 hour ago	Current delete
Automation::Customer Satisfaction Rating - Subject	3 days ago	Current delete
Macro::Battery dead	3 days ago	Current delete
Macro::Close and redirect to topics	3 days ago	Current delete
Macro::Customer not responding	3 days ago	Current delete
Macro::Double billing	3 days ago	Current delete
Macro::Downgrade and inform	3 days ago	Current delete
Macro::DSLRS as Movie cameras	3 days ago	Current delete

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:

Dynamic content

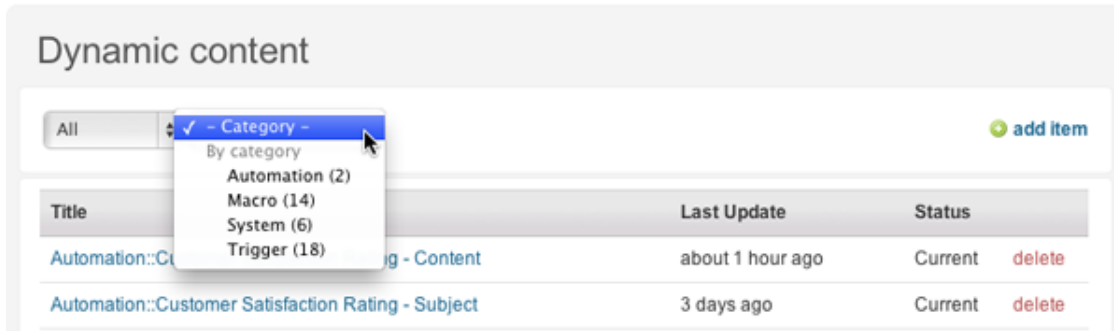
All
 Out of date
 - Category -
 [add item](#)

Title	Last Update	Status
Automation::Customer Satisfaction Rating - Content	about 1 hour ago	Current delete
Automation::Customer Satisfaction Rating - Subject	3 days ago	Current delete

Filtering by the out of date status allows you to quickly see the dynamic content that needs to be updated.

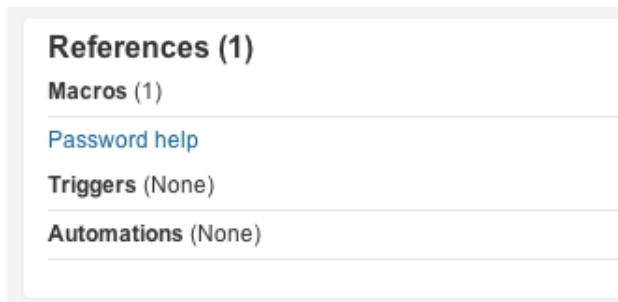
Organizing and viewing dynamic content by category

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, 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 Zendesk).

To delete a dynamic content item

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Dynamic Content**.
Zendesk Classic: Select the **Manage** menu, then select **Dynamic Content**.
2. Locate the item you want to delete
3. Click **Delete**.
4. 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. Click the **Manage** icon (⚙️) in the sidebar, then select **Dynamic Content**.

Zendesk Classic: Select the **Manage** menu, then select **Dynamic Content**.

2. Locate the item that contains the variant you want to delete and open it.
3. Locate the variant and click **Delete**.
4. 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 your Zendesk. You can then manage updates to the translated content by editing the variants.
- You can create all the default 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 Zendesk 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}}`.

The screenshot shows a macro configuration window. At the top, the 'Macro title' is 'Password help'. Below this, under the heading 'Perform these actions:', there are two action items. The first is 'Status' with a dropdown menu set to 'Solved'. The second is 'Comment/description' with a dropdown menu and a text field containing the dynamic content placeholder `{{dc.password_help}}`. Each action item has a red minus sign button to its right.

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 user welcome email message can be replaced with a dynamic content placeholder.

The screenshot shows a system message configuration window. The title is 'User welcome email'. The text field contains the dynamic content placeholder `{{dc.user_welcome_email}}`. Below the text field, the message content is previewed as 'Message emailed to users upon sign-up.'

You can use dynamic content placeholders in the following:

- Sign up messages on the **End-users** settings page.
 - User registration message
 - User welcome email
 - Email verification email
- Agent signature, which is located on the **Agents** settings page.
- Forums tab name in the Web portal, which is located in the **Web portal** settings page.
- Home page welcome message and its title (You edit the message directly on your Zendesk 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 Zendesk. 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 default language and then export the files. The export creates separate files for each of the languages you support in your Zendesk. Your translation agency can add all the translated content into the files and when you import the files back into your Zendesk the language variants will be created automatically for you. In other words, there's no need to manually create language variants in your Zendesk if you're sending the export files out for translation.

For information about creating and managing dynamic content, see [Providing multiple language support with dynamic content](#).

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 Zendesk when the translations are complete.

The export process creates separate CSV files for every language that you support. For example, if your default 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. Click the **Manage** icon (⚙️) in the sidebar, then select **Dynamic Content**.
Zendesk Classic: Select the **Manage** menu, then select **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 Zendesk.

Note: The CSV files are exported in the UTF-8 format and you must import the files back into your Zendesk 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 Zendesk.

To import dynamic content

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Dynamic Content**.
 - Zendesk Classic:** Select the **Manage** menu, then select **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 Zendesk), 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.

Detecting an end-user's language from an email message

As described in *Setting and detecting a user's language*, there are several ways to detect and set an end-user's language.

One of those ways is automatically detecting an end-user's language from an email message sent to your Zendesk.

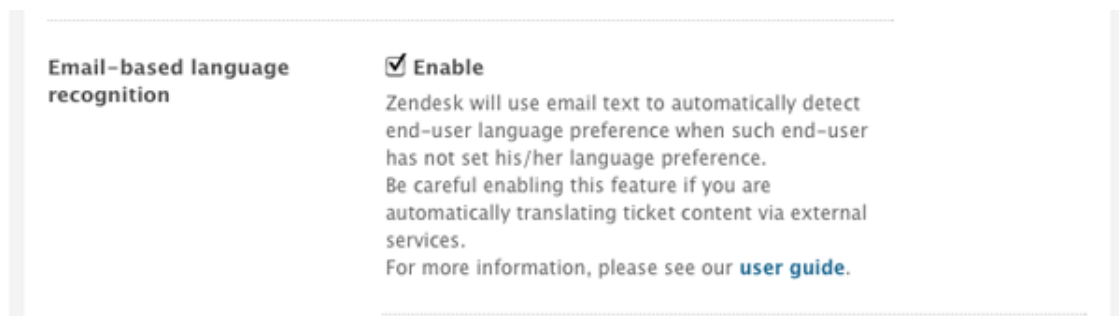
Here's how it works:

- If the user is either unregistered (new) or does not currently have a language setting selected, then the text in the email message is analyzed to determine what the language is. If the detected language is one of your supported languages (selected on the **Localization** tab of the **Account** page) then the user's language preference is set.
- If the detected language is not supported in your Zendesk, the language preference is set to the closest match. For example, if you receive an email that contains Hungarian and that is not one of your supported languages, the nearest match, in this case German, is set as the user's language.

Using email-based language detection is especially useful if you provide support via email only since your users don't use the Web portal, never sign in, and aren't able to set a language preference. The only other way to handle language for email-only end-users is to have them send email support requests to a language specific email address such as `german@support.myaccount.com`.

To enable email-based language detection

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Email**.
Zendesk Classic: Select the **Settings** menu, then select **Channels > Email > Edit**.
2. Select **Email-based language detection > Enable**.



3. Click **Save**.

Supported languages

The email language detection feature currently supports the following languages:

- Arabic
- Chinese
- Danish
- Dutch
- English
- Finnish

- French
- German
- Hebrew
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese
- Russian
- Spanish
- Swedish
- Thai

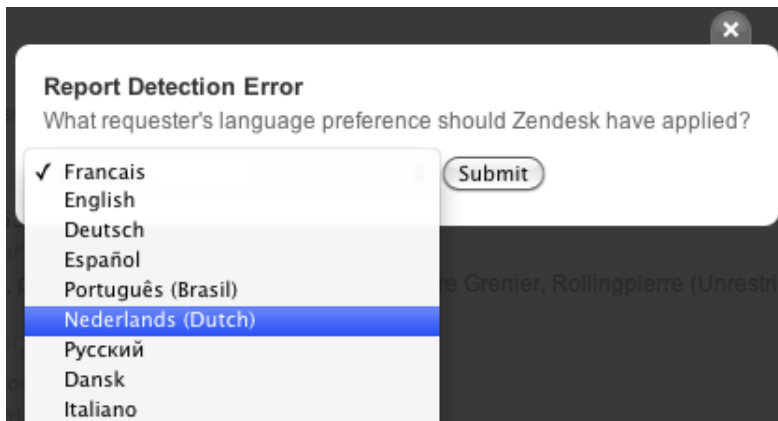
Detection accuracy and resetting the user's language

We do not guarantee 100% accuracy for the language detection. It's typically accurate but there are times when the language detection may not identify the language correctly.

When a user's language is set via automatic language detection, an event is added to the ticket.



If the language was detected incorrectly, click the **Report error** link and you'll see the **Report Detection Error** tool:



You can reset the user's language by selecting a different language from the drop-down list and then clicking **Submit**. When you reset the language, you're also providing Zendesk with feedback about the language detection, which we will use to improve the accuracy of this feature.

Note: Language detection does not always distinguish between variations of a language (for example, traditional and simplified Chinese and Portuguese and Brazilian Portuguese).

Email delimiter for email messages with mixed language

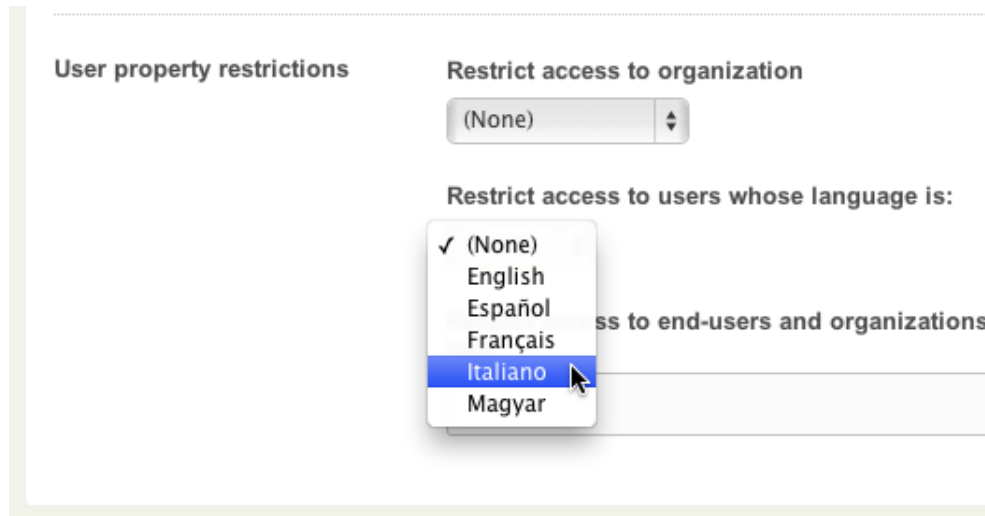
There may be times when you want to allow the use of more than one language in incoming email support requests and also correctly detect the language that the user entered into their message. For

example, some companies like to collect data about the user's software configuration (the operating system, the browser they're using, etc.) and include that in the email generated when a user requests support via the Web portal . The text entered by the user into the message may be in any number of languages but the configuration data is only in English.

To support that, you can add a delimiter, `{{classifier_delimiter}}`, to your email template. All of the text above the delimiter is used to detect the user's language. All of the text below the delimiter is ignored by language detection. For more information about customizing your email template, see [Customizing your email templates](#).

Appending locale IDs to language restricted forum content URLs

To manage multiple languages in your web portal, you have the option of restricting forums based on language (see [Displaying forum content based on language](#)).



When you restrict a forum to a language, only users that have the language enabled in their web browser or who are logged into your web portal and have that language chosen as their preferred language will see the forum. When neither of those conditions are met, the user will not see the content.

If you send links to the language content in your forums (for example, in a macro) you can append the locale ID to ensure that all users who click the link see the forum content. For example, here's the link to the Italian version of the Zendesk Getting Started guide with the locale ID added:

```
https://support.zendesk.com/forums/21795451?locale=22
```

Note: Also notice that forums URLs do not need to include the title of the topic. The topic ID is all that's required. For example, this is the full URL to the Italian getting started guide:

```
https://support.zendesk.com/forums/21795451-Guida-introduttiva-per-Zendesk
```

You don't need anything after the topic ID for the URL to work. In our example above, we deleted - Guida-introduttiva-per-Zendesk and then added the locale ID.

The following table lists all of the locale IDs for all of the supported languages in Zendesk.

Name	Locale	ID
Arabic	ar	66
Bosnian	bs	1008
Bulgarian	bg	94
Catalan	ca	1075
Czech	cs	78

Name	Locale	ID
Chinese, Simplified	zh-cn	10
Chinese, Traditional	zh-tw	9
Danish	da	1000
Dutch	nl	1005
English (Canada)	en-ca	1181
English (UK)	en-gb	1176
Estonian	et	101
Filipino	fil	47
Finnish	fi	84
French	fr	16
French (Canada)	fr-ca	1187
German	de	8
Greek	el	93
Hebrew	he	30
Hungarian	hu	1009
Indonesian	id	77
Icelandic	is	24
Italian	it	22
Korean	ko	69
Japanese	ja	67
Latvian	lv	1101
Lithuanian	lt	1092
Norwegian	no	34
Persian	fa	1016
Polish	pl	13
Portuguese (Brazil)	pt-br	19
Portuguese (Portugal)	pt	1011
Romanian	ro	23
Russian	ru	27
Serbo-Croatian	hr	74
Serbian	sr	1150
Slovak	sk	1003

Name	Locale	ID
Slovenian	sl	72
Spanish	es	2
Swedish	sv	92
Thai	th	81
Turkish	tr	88
Vietnamese	vi	26
Ukrainian	uk	1173

Chapter 12

Supporting multiple brands (Zendesk Enterprise)

- *Setting up to manage multiple brand Zendesk accounts (Enterprise)*
- *Using Chat when managing multiple brands (Enterprise)*
- *Tracking customer satisfaction ratings when managing a multiple brand Zendesk (Enterprise)*

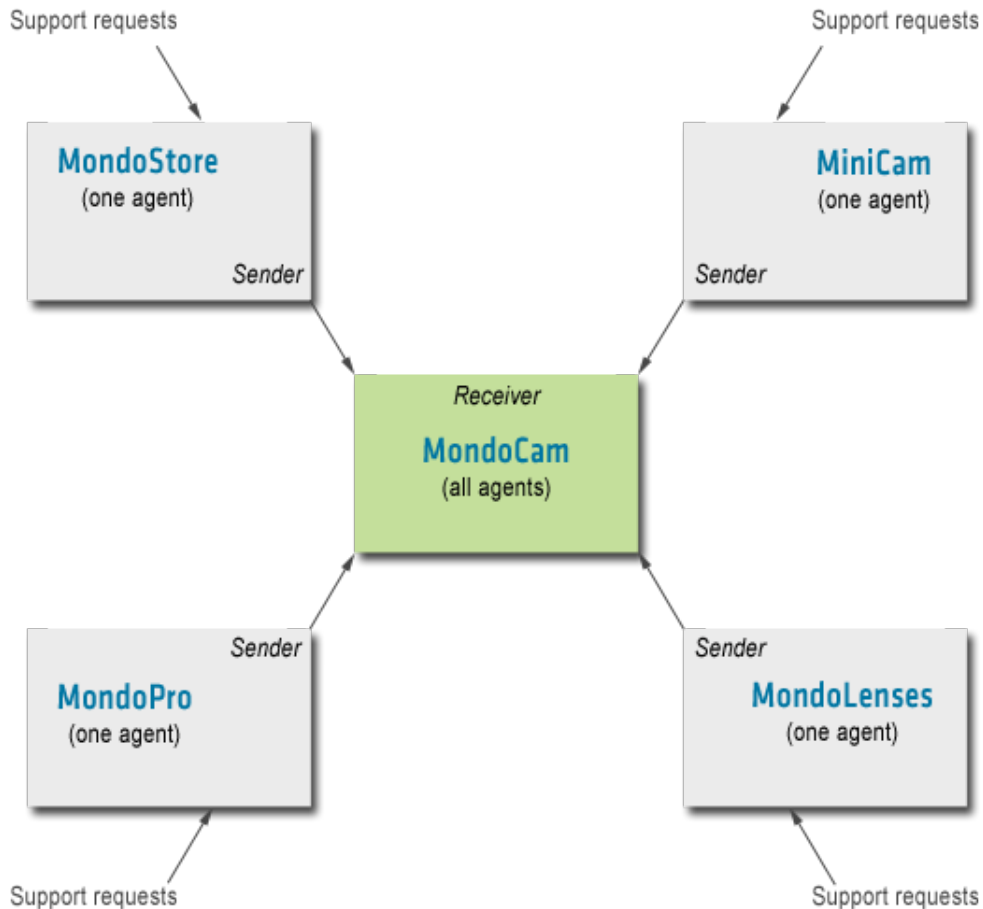
Setting up to manage multiple brand Zendesk accounts (Enterprise)

In the Enterprise version of Zendesk, you can manage support for multiple brands by linking separate branded Zendesk accounts to a central Zendesk (known as the *hub*). Support requests are received by the branded Zendesk accounts (known as *spokes*) and are automatically shared to the hub, 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 spoke accounts and end-users are never aware that their requests have been handled by the hub.

Important: When you set up your Zendesk account to support multiple brands, be aware that some features function differently than they do in a stand-alone Zendesk. See [How the user experience and workflow are affected](#) below.

Linking between the spoke accounts and the Zendesk hub account is made possible using ticket sharing (see [ticket sharing](#)). Sharing agreements are established between the spokes (the senders of support requests) and the hub (the receiver of those requests) and support requests become tickets that are resolved by the hub, as shown here:



Each of the spoke accounts require at least one agent with administrator permissions (this can also be the account owner) who can set up the sharing workflow with the hub Zendesk and customize the look of the spoke accounts.

Once set up, the ticket workflow is managed automatically because the ticket status is synced between the spoke and hub Zendesk accounts (ticket sharing creates a synced copy of the ticket in the hub). When the ticket status is set to solved by agents in the hub, it is updated in the spokes as well. Tickets are then closed within the spoke accounts 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 hub Zendesk. However, all user and forum management is done in the spoke accounts. For more information, see [How the user experience and workflow are affected](#) below.

Linking spoke accounts to the hub Zendesk is done in a series of simple steps, as follows:

1. [Set up your spoke accounts and then contact Zendesk Support](#)
2. [Set up the ticket sharing agreements](#)
3. [Create the ticket sharing triggers for each spoke account](#)
4. [In the spoke accounts, disable the business rules that notify agents](#)
5. [Create business rules for tracking and managing shared tickets](#)

How billing works

You can add as many spoke accounts as you need. Each account is an Enterprise account that must have at least one agent user. In terms of billing, Zendesk only charges for unique agent users. For example, if an agent is granted access to more than one of the spoke accounts, you will incur only one agent charge for that agent. One charge per agent, regardless of the number of spoke accounts that agent has access to.

How the user experience and workflow are affected

Because of the multiple accounts involved in managing branded Zendesk accounts, some features function differently than they do in a stand-alone Zendesk.

- **User management.** All user management is done in the spoke accounts since your users are added to those accounts. No user data is synced to the hub Zendesk. The hub Zendesk is aware of the users as ticket requesters but they are not added to the user database of the hub Zendesk. Adding and editing your user base is done separately in your spoke accounts.
- **Forums.** Forums and knowledge bases are created and managed in the separate spoke accounts. 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 spoke. It's not possible to automatically share knowledge base articles to all the spoke accounts. If for example you want the same knowledge base articles in each one of your spoke accounts, you need to create separate topics in each spoke and then copy the content into each article.
- **Chat.** Chat works a little differently when managing multiple brands and requires that chats originate from the hub Zendesk. For more information, see [Using Chat when managing multiple brands](#).
- **Customer satisfaction ratings.** Customer satisfaction ratings in spoke accounts are not quite as detailed as in a single account implementation. In the spoke accounts, you can track the overall satisfaction rating. For more information, see [Tracking customer satisfaction ratings when managing a multiple brand Zendesk](#).
- **Custom ticket fields.** If you use custom ticket fields, you need to add them to both the hub Zendesk and to any of the spoke accounts that you want to use them in. Just create custom ticket fields of the same types using the same names (in the hub and spoke accounts) and the fields will sync automatically.
- **Advanced Analytics (GoodData).** You can report on all the tickets that have been shared to the hub Zendesk using the GoodData report called **Created Tickets by Submission Method**.

Step 1: Set up your spoke accounts and then contact Zendesk Support

To begin, determine how many spoke accounts you need, create new trial Zendesk accounts for each, and then contact a Zendesk representative and they will set them up as spoke accounts that are linked to your hub Zendesk account.

If you already have a Zendesk account and have added your agents to it and you want to expand it to include spoke accounts, you can of course use your existing account as the hub. You'll also need to sign up for or upgrade to the Enterprise version of Zendesk.

To set up your Zendesk 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 spoke accounts to the hub Zendesk account.

To create sharing agreements

1. Sign in to each of your spoke accounts, one at a time, as an administrator.
2. Select the **Ticket Sharing** tab of the **Tickets** settings page to create the sharing agreement. (This is documented in more detail in [Setting up a ticket sharing agreement](#)).

New Sharing Invite

Receiver subdomain: .zendesk.com
 Be careful to spell the subdomain correctly. If you don't know what the receiver's subdomain is, get in touch with them to find out.

Comment and status permissions: ⌵
 Allow partner to make public comments & change the status, or only private comments but do not allow the syncing of the status. [Learn more](#)

Tag synchronisation: ⌵
 Sharing tags can mean some custom fields are also synced; however, it may increase the amount of tags in either account.

Note: We recommend allowing both public and private comments and the syncing of ticket tags.

3. Sign in to the hub Zendesk and accept the agreements (**Ticket Sharing** tab of the **Tickets** settings page). All of the sharing agreement requests can be reviewed and accepted.

Step 3: Create the ticket sharing triggers for each spoke account

You now need to set up the workflow that automatically shares to the hub Zendesk all tickets received by the spoke accounts. To do this, you create a trigger for each spoke account.

To create the ticket sharing trigger

1. Sign in to each of your spoke accounts, one at a time, as an administrator.
2. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.

Zendesk Classic: Select the **Manage** menu, then select **Triggers and mail notifications**.

3. Select **Add Trigger**.
4. Enter a title for the trigger (for example: *Share tickets with hub Zendesk*).
5. Add the following condition:
 - **Ticket is Created**
6. Add the following two actions:
 - **Share ticket with** [your hub Zendesk name].
 - **Add tags** [enter a tag that identifies the spoke Zendesk account]

Note: By adding a tag that identifies the spoke account, you can route tickets as needed in the hub Zendesk 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:

The screenshot shows a trigger configuration form with the following sections:

- Trigger title:** A text input field containing "Share tickets with MondoCam".
- Conditions:**
 - Section 1: "Meet **all** of the following conditions:"
 - Condition 1: "Ticket is..." dropdown, "Created" dropdown, and a red minus button.
 - "Add condition" button with a green plus icon.
 - Section 2: "Meet **any** of the following conditions:"
 - Condition 1: "-- Click to select condition --" dropdown and a red minus button.
 - "Add condition" button with a green plus icon.
- Actions:**
 - Action 1: "Share ticket with" dropdown, "MondoCam @ Zendesk" dropdown, and a red minus button.
 - Action 2: "Add tags" dropdown, "minicam" text input, and a red minus button.
 - "Add action" button with a green plus icon.

Step 4: In the spoke accounts, disable the business rules that notify agents

You also need to deactivate any business rules (automations or triggers) in the spoke accounts 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 spoke account agents do not receive notifications. Only the agents in the hub Zendesk should receive notifications; therefore, all ticket activity notifications will come from the hub Zendesk.

Even though you may not explicitly assign an agent to a ticket in a spoke account, one is automatically assigned because it's a required ticket field. Once it's received in the hub Zendesk, an agent is assigned based on the business rules in that Zendesk.

To deactivate a trigger

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Triggers**.
Zendesk Classic: Select the **Manage** menu, then select **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 hub Zendesk to control the workflow and track tickets received from the spoke accounts.

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 hub Zendesk to, for example, track all of the tickets that have been received from the spoke accounts. To track the specific Zendesk where the shared tickets originated, you can use tags to identify each spoke.

The screenshot shows a view configuration interface in Zendesk. At the top, there is a 'View title' field containing 'Tickets shared from MiniCam'. Below this, there is a section for conditions: 'Meet **all** of the following conditions:'. There are three conditions listed, each with a red minus sign to its right for removal:

- Ticket channel is Ticket sharing
- Status is Less than Closed
- Tags Contains at least one of the following minicam

At the bottom of the conditions list, there is an 'Add condition' button with a green plus sign.

You can create a view, or report, like this for each of the spoke accounts.

Note: Don't forget that you need to have included the spoke account tags in the sharing triggers you created (described above in [Create the ticket sharing triggers for each spoke account](#)).

You can also use the spoke account tags to route tickets through your workflow. For example, if a specific support group should be assigned to tickets from a specific spoke account, you can create a trigger in the hub Zendesk to automatically assign those tickets to that group. Here's an example of what that might look like:

Trigger title

Meet **all** of the following conditions:

Meet **any** of the following conditions:

Perform these actions:

Using Chat when managing multiple brands (Enterprise)

Zendesk Enterprise

If you've set up to manage a multiple brand Zendesk in the Enterprise version of Zendesk (see [Setting up to manage multiple brand Zendesk accounts](#)), you need to run Chat from the hub Zendesk not the spoke accounts. This is because the agents who solve tickets are in the hub, not the spokes.

Solution

You can still provide Chat to your users in the spoke accounts, you just have to generate the Feedback Tab code in the hub Zendesk and add it to each of the spokes.

Chat is enabled as a feature of the Feedback Tab, so there's two steps to set this up. First, enable and configure Chat and then enable and configure the Feedback Tab to include Chat.

To configure Chat in the hub Zendesk

1. Sign in to the hub Zendesk as an admin. If you're using Enterprise or custom agent roles (see [Custom agent roles](#)), any agent that has permission to set up Channels can also perform this task. Zendesk's predefined roles of Administrator and Advisor both have these permissions.
2. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Chat**.

Zendesk Classic: Select **Settings > Channels > Chat**.

3. Enable Chat by selecting **Yes**.
4. Set the **Chat about my ticket?** option to **No**.

Note: This option allows users to chat about a ticket they are currently viewing. This feature won't not work in the spoke accounts because the agents are located in the hub Zendesk, not the spokes.

5. Select the number of **Maximum chat requests per agent**.
6. Optionally, customize the welcome message.
7. Click **Save**.

To configure the Feedback Tab in the hub Zendesk

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Feedback Tab**.

Zendesk Classic: Select **Settings > Channels > Feedback Tab**.


2. There are lots of options for setting up the Feedback Tab. How you set these is up to you. The option that is relevant to this task is **End-users can chat with Agents?**. Set that to **Yes**.
3. When you've finished configuring the Feedback Tab, click **Preview and grab code snippet**.

Note: On the Feedback Tab Settings page there is also a tab called **Advanced Customization**. This is where you can brand the Feedback Tab. However, since the Feedback Tab will be used by all of your spoke accounts, you should leave the default settings as is. In other words, don't add any branding.

4. Select and copy the code snippet.

To add the Feedback Tab to each of the spokes

1. Sign in to each of the spoke accounts, one at a time, as a user with permission to add extensions. Zendesk's predefined roles of Administrator and Advisor both have these permissions.

2. Click the **Manage** icon () in the sidebar, then select **Settings > Extensions**.
Zendesk Classic: Select **Settings > Extensions**.
3. Select **Add Widget** and then **Global JavaScript**.
4. Enter a title for the widget (for example: *Feedback Tab*).
5. Set the **Available For** option based on how to want users to access your Zendesk.
6. Paste the Feedback Tab code you copied from the hub Zendesk.
7. Click **Submit**.
8. Repeat this for each of the spoke accounts.

Tracking customer satisfaction ratings when managing a multiple brand Zendesk (Enterprise)

Zendesk Enterprise

If you've set up to manage a multiple brand Zendesk in the Enterprise version of Zendesk (see [Setting up to manage multiple brand Zendesk accounts](#)), customer satisfaction rating does not work the same way it does in a stand-alone Zendesk. This is because customer satisfaction rating requests are sent to end-users via the spoke accounts, which means that the responses you get will not be associated with the agent in the hub Zendesk who solved the ticket.

Solution

You can track the overall satisfaction rating for each spoke account. You can get the total number of good and bad ratings from the Reporting CSV Export file. This file contains details for all tickets (excluding ticket comments) over the last 3 months, including the satisfaction score.

Community tip! [Arnaud de Theux](#) created a script to automatically fetch the satisfaction score of each spoke plus the main hub. [Check it out](#) in our community forums!

To download the CSV report

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Reports > Export**.
Zendesk Classic: Select **Manage > Reports > Export**.
2. Generate a new CSV report or download the current report by selecting **CSV Export > Latest**.
3. After the archive (.zip) file is downloaded, extract the file and open it in spreadsheet program such as Microsoft Excel or OpenOffice.org Calc.

The column called Satisfaction Score contains the ratings.

Views and reports can also be created to track satisfaction ratings in the spoke accounts.

The screenshot shows a 'View title' configuration box. The title is 'Satisfaction ratings: Good'. Below the title, there is a section 'Meet all of the following conditions:'. There are two conditions listed:

- Condition 1: Status is Closed. This condition has a red minus sign (-) to its right, indicating it is currently selected.
- Condition 2: Ticket Satisfaction is Good. This condition also has a red minus sign (-) to its right, indicating it is currently selected.

At the bottom of the configuration box, there is an 'Add condition' button with a green plus sign (+).

Chapter 13

Extending your Zendesk

- *Notifying your Yammer feed*
- *Displaying ticket activity in your Yammer Activity Stream*
- *Setting up anonymous ticket submissions with Zendesk for Wordpress*
- *Setting up remote authentication for Wordpress*
- *Setting up and using the Zendesk for Wordpress plugin*
- *Displaying latest satisfaction totals and an overall score*
- *Displaying your last 100 satisfaction ratings*

Notifying your Yammer feed

If your company uses Yammer, you can send notifications to your Yammer feed when Zendesk tickets are created or updated. The setup consists of the following steps:

1. *Register your Zendesk in Yammer.*
2. *Add a target in Zendesk that points to Yammer.*
3. *Use the target in a Zendesk trigger or automation.*

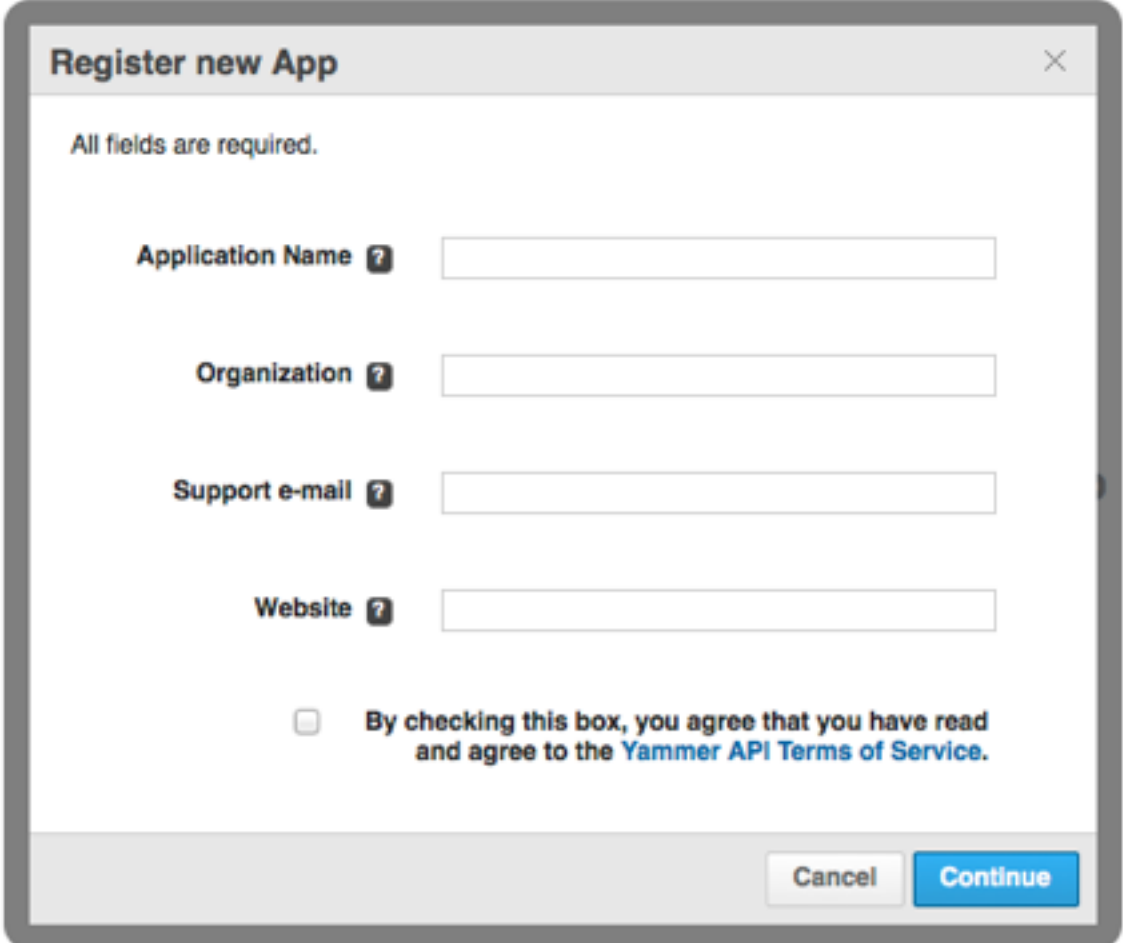
You can also display abbreviated Zendesk notifications in the activity panel on the Home page of your Yammer users. For more information, see *Displaying ticket activity in the Activity stream in Yammer.*

Register your Zendesk in Yammer

To register your Zendesk in Yammer

1. Make sure you're logged into your company's Yammer account and then go to https://www.yammer.com/client_applications/.
2. Click the link on the page to register a new app.

The following registration form appears.



The screenshot shows a modal window titled "Register new App" with a close button (X) in the top right corner. Below the title, it states "All fields are required." There are four text input fields, each with a question mark icon to its left: "Application Name", "Organization", "Support e-mail", and "Website". At the bottom of the form, there is a checkbox that is currently unchecked, followed by the text: "By checking this box, you agree that you have read and agree to the [Yammer API Terms of Service](#)." At the bottom right of the modal, there are two buttons: "Cancel" and "Continue".

3. Enter the following values in the fields:

- **Application Name:** The name that identifies your Zendesk app in Yammer. Example: Mondocam Support Team.
- **Organization:** The name of your company or organization.
- **Support e-mail:** The email Yammer users can use to contact support. Example: support@mondocam.zendesk.com
- **Website:** The main URL for your Zendesk account. Example: https://mondocam.zendesk.com.

4. Agree to the terms of service.

Yammer registers your Zendesk and displays a status page with keys and tokens. Leave the page open for the next step.

Mondocam Support Team
Status

APP ENABLED YOUR NETWORK'S APP DIRECTORY GLOBAL APP DIRECTORY

Enabled Basic configuration completed Complete App Directory configuration Deploy to your network's App Directory Submit your app for review Deployed the global App Directory

KEYS AND TOKENS

Client ID	e1c4e6132uPjG1Y9YK1z1LuQ
Client secret	8k1190nJ12nd8p9u4B54CA7TuTN3vrrup1TmPN1FTY
Expected redirect	None specified

Add a target in Zendesk that points to Yammer

Targets are used in automations and triggers in Zendesk. For example, you can define a **Notify target** action in a trigger and select Yammer as the target. See [Notifying external targets](#).

The first step is to add a Yammer target in Zendesk.

To add a target that points to Yammer:

1. In Zendesk, click the **Manage** icon (⚙️) in the sidebar, then select **Extensions** under **Settings**.

Zendesk Classic: Select the **Settings** menu, then select **Extensions**.

2. Click the **Targets** tab and then select **Add target**.

Note: You may need to scroll to the right to see the link.

3. Select the Yammer target from the list and enter the following values in the fields:

- **Title:** Enter a name for your target. It'll appear in Zendesk in your triggers and automations.
- **Consumer key:** Paste the value from the **Client ID** field in the Yammer status page you obtained in the previous section. See [Register your Zendesk in Yammer](#). Example: `q1cWn12uMjS1Y9fH5z1LuQ`.
- **Secret:** Paste the value from the **Client Secret** field in the Yammer status page. Example: `Rm1iNInJ1ZnoDgHowhB54CF7TuTh1vrup4AhWPh1FTY`.
- **Group ID:** Optional. You can send notifications to a specific Yammer group.

Example:

Yammer target

Title

Consumer key

The consumer key provided when creating the application

Secret

The secret key provided when creating the application

Group ID


Enter a group ID if you want to push messages to a specific group. Leave blank if you want to push public Yammer channel. You can find your group IDs in <http://www.yammer.com/api/v1/groups.xml>.

Test Target

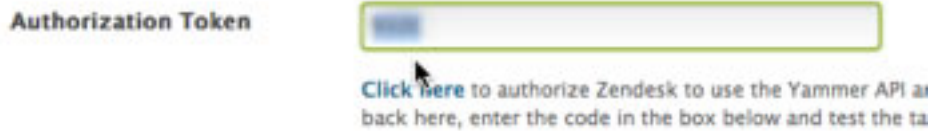
4. Click **Submit** with **Test target** selected.

A new blank field called Authorization Token appears on the page.

Authorization Token

[Click here](#) to authorize Zendesk to use the Yammer API and obtain the authorization token. After receiving back , enter the code in the box below and test the target again to finalize the authorization process.

5. Click the link below the new field to authorize Zendesk to use the Yammer API and obtain the authorization token from Yammer.
6. On the Yammer page that opens, click **Authorize**.
Yammer confirms that your application is enabled and displays a 4-digit authorization code.
7. Paste the 4-digit code into the **Authorization Token** field in Zendesk.



8. Click **Submit** with **Create Target** selected.

The new target appears in the Targets tab in Zendesk.

Extensions

Widgets **Targets** CRM Activity Streams

Targets enable you to execute call backs (hooks) into external systems on specific ticket events. You can use this to receive notification via SMS or Twitter when a specific trigger executes. [Learn more](#)

Active targets (1)

Acme Yammer Stream	0 messages sent	Yammer target
--------------------	-----------------	---------------

Using the target in a Zendesk automation or trigger

After adding a target in Zendesk that points to Yammer, you can use it in automations and triggers with the **Notify target** action. Here's an example of a trigger that notifies the company's Yammer feed every time an urgent ticket is solved:

Trigger title

Post to Yammer when urgent ticket solved

Meet **all** of the following conditions:

Priority	is	Urgent	-
Status	is	Solved	-
Add condition			+

Meet **any** of the following conditions:

-- Click to select condition. --			-
Add condition			+

Perform these actions:

Notify target		Acme Yammer Stream	-
Message:			

Because you're interacting with an external target, there may be a delay between when the trigger or automation runs and when you'll see the results in the Yammer feed.

For more information on triggers and automations, see:

- [Streamlining workflow with ticket updates and triggers](#)
- [Streamlining workflow with time-based events and automations](#)

Displaying ticket activity in the Activity stream in Yammer

If your company uses Yammer, you can keep everyone informed about your Zendesk ticket activity by displaying the activity in the Activity stream on their Home page in Yammer.

Don't confuse the Activity stream with your Yammer feed. The Activity stream consists of brief messages displayed in the Recent Activity panel on the Home page of each Yammer user. If you want to post Zendesk activity to your Yammer feed, see [Notifying your Yammer feed](#).

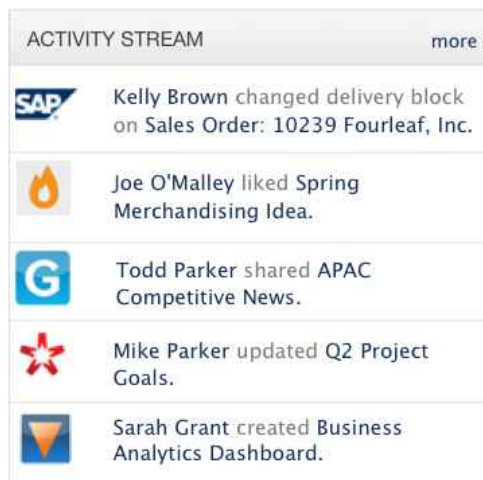
This integration is available for Yammer **paid** plans and all Zendesk plans. You must be an administrator in Zendesk and Yammer to set up the integration.

Topics covered in this article:

- [How it works](#)
- [Setting up the integration](#)

How it works

On your Yammer Home page, you'll notice an activity panel on the right side. The panel has many items feeding into it in real-time. This is where the Zendesk ticket activity is displayed.



Note: Comments in the Activity stream only contain a snippet of the ticket comment and the author of the comment. There is no other ticket information or links. This is a limitation of the Yammer API.

The Activity stream is very different than your Yammer feed. The feed can contain a lot of information while the Activity stream is intended for small chunks of information. See the [Activity Stream Ticker FAQ](#) on the Yammer website for more information. Zendesk tries to keep updates in the recent activity stream as short, yet as informative, as possible.

You have control over what appears in your Activity stream. You can choose from predefined options, including:

- Ticket creation (including who created the ticket, the ticket ID, and the subject, all hyperlinked)

- Ticket status changes
- Ticket priority changes
- Satisfaction ratings

To reduce noise in the Activity stream, Zendesk will only send ticket updates to agents who are assigned or in the same group. If no group is defined on a ticket, then Zendesk updates everyone until the ticket moves to an assigned group.

Setting up the integration

To set up the integration, you must complete setup steps in Yammer and Zendesk. You must also be an administrator in both applications.

To complete the Yammer setup

1. From your Yammer home page, select **Admin** in the left panel (this may be hidden by a **More** link).
2. Open the **Activity Stream Keys** section.
3. Select **Zendesk** from the drop down, then click **Generate** to give Zendesk access to your Activity stream.

The page refreshes and Zendesk is added to the list of keys.

4. Copy the token and save it for the Zendesk setup steps. It should look something like:

```
01KGQ3fyEUKnpOTTqRZvS3
```

To complete the Zendesk setup

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Extensions**.
Zendesk Classic: Select **Settings > Extensions**.
2. Click the **Activity Streams** tab.
3. Click **Add your Yammer account**.
4. Put your token in the **Oauth access token** field.
5. Click **Save tab**.
6. Select the items you'd like to appear in the activity stream.
7. Click **Save tab**.

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 administrator 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 Zendesk users can submit requests. You can however allow your Wordpress site users who do not also have a Zendesk account (considered anonymous users) to submit support requests.

There are several easy steps to set this up:

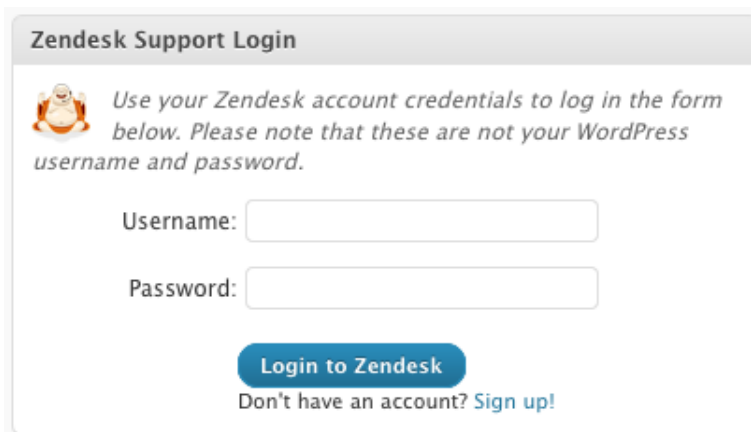
1. Enable anonymous ticket submissions in the Zendesk for Wordpress plugin.
2. Choose an existing Zendesk administrator or agent who is also a user in your Wordpress site to act as the delegator for anonymous requests.
3. Have the assigned agent sign in to your Zendesk via the Zendesk ticket widget to authenticate their account.

This delegator role is simply a means to access your Zendesk and submit the request on behalf of the anonymous user. Depending on how your Zendesk is set up (open or registered users only), the requester may also be required to register with your Zendesk 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 sign in to your Zendesk 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:



Zendesk Support Login

 Use your Zendesk account credentials to log in the form below. Please note that these are not your WordPress username and password.

Username:

Password:

[Login to Zendesk](#)

[Don't have an account? Sign up!](#)

To allow anonymous support requests

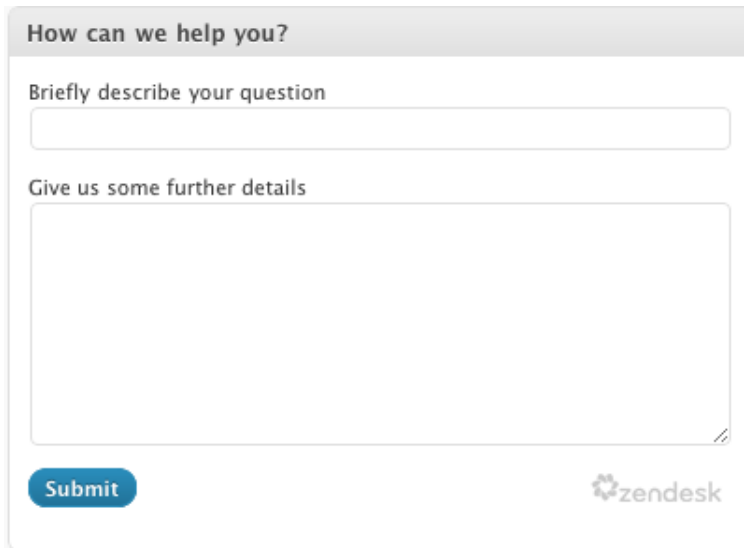
1. Log into Wordpress as an administrator.
2. Select **Settings** from the Zendesk panel.
3. You should have first enabled the contact form for one or more types of users via the visibility settings described in [Setting the dashboard widget visibility by user type](#).

4. Select the **Anonymous Requests** check box.
5. Select a agent from the **Anonymous Requests By** drop-down list.

Note: Only agents that have logged into your Zendesk via the ticket widget are shown in the list.

6. Click **Save Settings**.

Anonymous users can now submit requests using the contact form on the Wordpress administrator dashboard.



The image shows a contact form with a grey header bar containing the text "How can we help you?". Below the header, there are two text input fields. The first field is labeled "Briefly describe your question" and is a single-line text box. The second field is labeled "Give us some further details" and is a larger multi-line text box. At the bottom left of the form is a blue "Submit" button. At the bottom right is the Zendesk logo, which consists of a gear icon followed by the word "zendesk" in lowercase.

Follow up on requests submitted via this form are handled through your Zendesk (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 Zendesk using their WordPress user ID and password. They access your Zendesk 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 your Zendesk. When they are successfully authenticated by WordPress, they are seamlessly logged in.

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 users in Zendesk. All of that happens in WordPress.

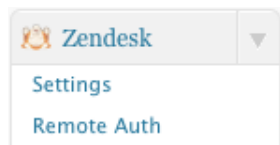
If you switch to remote authentication after you've already set up users in Zendesk, they will no longer have access to those user accounts (their old Zendesk login). You can however make sure that their former Zendesk identity is associated with their WordPress user account by using the same email address in both user accounts. In other words, if a user's WordPress account uses the same email address as their Zendesk account, 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

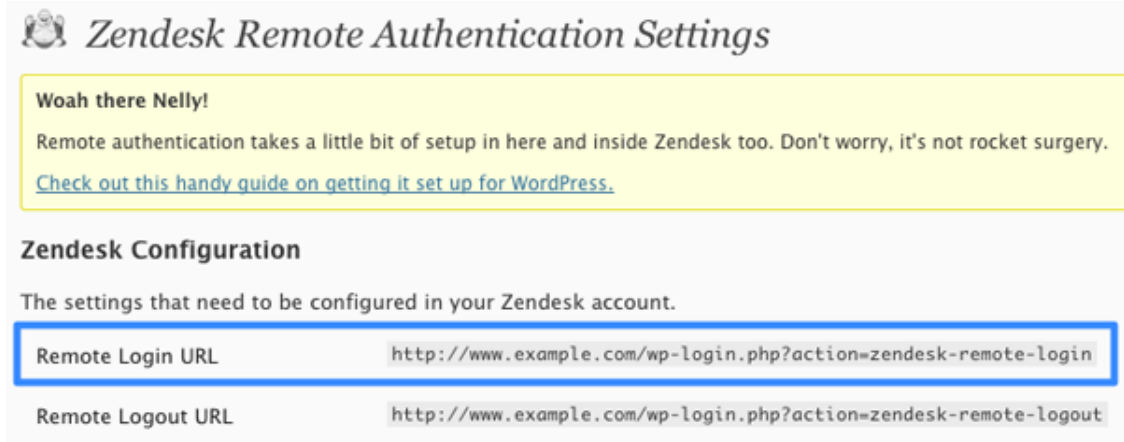
This process is a back and forth between your WordPress site and Zendesk. Sign in to both as an administrator.

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. Click the **Manage** icon (⚙️) in the sidebar, then select **Security**.
Zendesk Classic: Select the **Settings** menu, then select **Security**.
2. Select the **Single Sign-on** tab, then select the **Enabled** option.
3. Click the **Edit** link for the **JSON Web Token** strategy.
4. In WordPress, select **Remote Auth** from the Zendesk panel.



5. Select and copy the **Remote Login URL**.



Woah there Nelly!
Remote authentication takes a little bit of setup in here and inside Zendesk too. Don't worry, it's not rocket surgery.
[Check out this handy guide on getting it set up for WordPress.](#)

Zendesk Configuration

The settings that need to be configured in your Zendesk account.

Remote Login URL	<code>http://www.example.com/wp-login.php?action=zendesk-remote-login</code>
Remote Logout URL	<code>http://www.example.com/wp-login.php?action=zendesk-remote-logout</code>

6. In Zendesk, copy the URL into the **Remote Login URL** input box.
7. If you want your users to return to your WordPress site after logging out of your Zendesk, copy the **Remote Logout URL** in WordPress and paste it into the **Remote Logout URL** in Zendesk.
8. In Zendesk, select the **Allow update of external ids?** option.
9. In Zendesk, select and copy your **Shared secret** 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.

10. In Zendesk, click **Save**. You've finished the Zendesk part of this set up.
11. In Wordpress, copy the shared secret into **Remote Auth Shared Token**.
12. Click **Save Changes**.

Now all Zendesk users, including yourself, will be authenticated through your WordPress site when logging in to your Zendesk.

Note: If you, as an administrator, need to sign 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 Zendesk. Using the plugin you can do the following in Wordpress:

- Allow your registered or unregistered (anonymous) Zendesk users to submit support requests from within the Wordpress administrator 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 tickets in the tickets widget, which is added to the administrator dashboard.
- View details for each ticket and then open them in your Zendesk to make updates.
- Add a contact form to the administrator 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 Zendesk Feedback Tab to your site.
- Allow your users to sign in to your Zendesk 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 administrator.

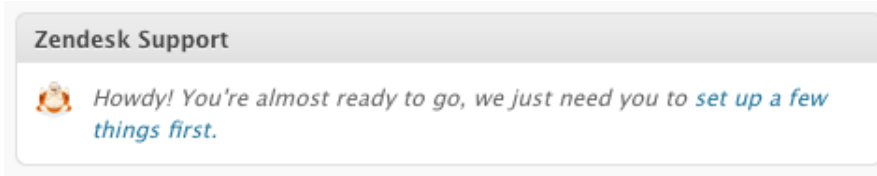
Note: If you installed a beta version of the Zendesk for Wordpress plugin, delete it in Wordpress before installing the new version.

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 administrator dashboard, as shown here:



You need to configure your Zendesk subdomain to access your Zendesk in Wordpress.

To configure your Zendesk account

1. Click the set up link and you'll be prompted to enter your Zendesk subdomain.

 A form titled "Your Zendesk Account". The text reads: "We need your Zendesk subdomain, so we can use Zendesk's API to get your ticket information." Below this is a label "Subdomain" followed by a text input field containing "http://", a small empty text box, and ".zendesk.com".

2. Enter your Zendesk subdomain.

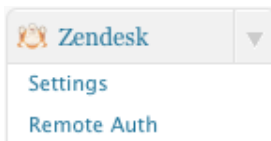
Note: If you use host mapping, this is automatically detected when you save the account settings.

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) users, and to add a Zendesk Feedback Tab 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 Zendesk agents to view tickets and quickly access your Zendesk 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 image shows a contact form widget with the following elements:

- Title: **How can we help you?**
- Field 1: **Briefly describe your question** (text input)
- Field 2: **Give us some further details** (text area)
- Button: **Submit** (blue)
- Logo: **zendesk** (bottom right)

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 Feedback Tab to your Wordpress site

Using the Zendesk for Wordpress plugin, you can also easily add a Feedback Tab to your Wordpress site. First generate the Feedback tab code in Zendesk, then add the Feedback Tab to your Wordpress site.

To generate the code for your Feedback Tab

1. Open the **Feedback Tab** channel settings page.
 - Click the **Manage** icon (⚙️) in the sidebar, then select **Channels > Feedback Tab**.
Zendesk Classic: Select the **Setting** menu, then select **Channels > Feedback Tab > Edit**.
2. Click **Preview and grab code snippet** at the bottom.
3. Copy the JavaScript code.

To add a Feedback Tab to your Wordpress site

1. Select **Settings** from the Zendesk panel.
2. Select one of the following Feedback Tab display settings:
 - Do not display the Zendesk Feedback Tab anywhere (this is the default)
 - Display the Zendesk Feedback Tab on all posts and pages
 - I will decide where the Zendesk Feedback Tab displays using a template tag
3. If you selected to display the Zendesk Feedback Tab on all posts and pages, enter the Feedback Tab code you generated in Zendesk (see the previous procedure).
4. If you selected to use a template tag, enter the Feedback Tab code you generated in Zendesk (see the previous procedure). You can then place the Feedback Tab 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 Feedback Tab 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 your Zendesk contact form (shown above) on their dashboards, may submit support requests. These users can either be registered users in your Zendesk 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 sign in to your Zendesk; an agent acts as the delegate for anonymous requests. If not, all your users must sign in to your Zendesk 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 Zendesk.

Zendesk for WordPress

Recently solved tickets (change view)

#191	My camera is not advancing when I take pictures	Solved
#162	My camera doesn't work	Solved
#193	f-Stop	Solved
#192	My bill is wrong	Solved

My Helpdesk Logged in as [agent@mondocam.com](#) (logout)




By selecting **Change View** you see and can switch to any of the shared views in your Zendesk.

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)



By clicking on a ticket, you see summary information about the ticket and can access your Zendesk to make updates.

Zendesk for WordPress	
<i>Viewing Ticket #198 (back)</i>	
<i>Subject:</i>	How do I use f-Stop?
<i>Description:</i>	Help!
<i>Ticket Status:</i>	Solved
<i>Requested by:</i>	Matt Price
<i>Created:</i>	June 1, 2011 at 10:58 am
<i>Updated:</i>	June 1, 2011 at 11:02 am
<i>Actions</i>	
<i>Comments:</i>	View the comments thread
<i>View:</i>	View this ticket on Zendesk
My Helpdesk Logged in as agent@mondocam.com (logout)	
	

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 your Zendesk and enable follow up communication about the ticket.

To convert a comment into a ticket

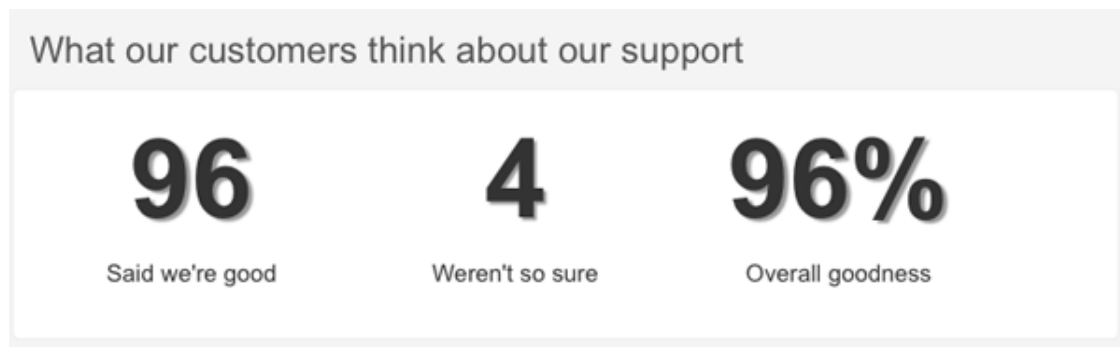
1. In the Wordpress administrator dashboard, select the **Comments**.
2. Locate the comment you want to convert to a ticket and click **Convert to Zendesk Ticket**.
3. You'll be prompted to enter a comment, which can be posted as a response in the post. Enter your comment and then optionally select either 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 your Zendesk.

Displaying satisfaction ratings totals and an overall score

You can display satisfaction ratings data in a ratings box widget that you embed on any page. This enables you to show quick statistics based on your last 100 satisfaction ratings. The following data is shown:

- Number of positive ratings
- Number of negative ratings
- Overall score (percentage of good ratings)



The numbers are based on your last 100 ratings, so it's a sliding window that is recalculated every time you receive a rating. The appearance and wording is customizable.

Administrators can add the ratings box widget.


Adding the ratings box widget to a page

Embedding this widget is similar to adding the Zendesk Feedback Tab to your Zendesk (see [Setting up your Feedback Tab channel](#)). The widget is a piece of JavaScript and CSS that you place on a web page.

To add the ratings box widget to a page

1. Click the **Manage** icon (⚙️) in the sidebar, then select **Customers**.
Zendesk Classic: Select **Settings > End-users**.
2. Click the **Satisfaction** tab.
3. Make sure that **Allow customers to rate tickets** is selected and that you have at least 100 ratings.

If you don't have at least 100 ratings, you'll see the following message. In that case you have to wait until you get more ratings to use the ratings box widget.

 **You currently have less than 100 ratings.** Public satisfaction will only work if you have 100 ratings or more. Until you gain 100 ratings, you will only see example images below.

4. Select **Allow me to display public satisfaction statistics**.
5. Click **Save Tab**.

The page updates with more information, including statistics based on your last 100 customer satisfaction ratings.

6. Under **How do I use it**, copy all the HTML code in the box. You'll only see this HTML code if you have 100 or more satisfaction ratings.
7. Decide where you want the ratings box widget to appear and paste the HTML code in that page.

The ratings box widget appears wherever you paste the code. If you want to customize the wording, the CSS, or place the widget display in a specific element on the page, see the next section.

Customizing the ratings box widget

You can customize the satisfaction ratings box widget by changing the wording, changing the look of the widget, or setting where it appears on the page.

Customizing the wording

If you don't like the default wording that appears under the three numbers in the ratings box widget, you can change it.

In the ratings box widget code, look for the following:

```
Satisfaction.show({
  strings: {
    goodRatings: "Said good",
    badRatings: "Weren't so sure",
    score: "Overall happiness",
    zendeskPlug: "Powered by <a href=\"http://www.zendesk.com/\">Zendesk</a>"
  }
});
```

You can customize the values for **goodRatings**, **badRatings**, and **score** as you like.

Customizing the look of the widget

There are two options for customizing the CSS to change the look of the widget:

- Add your own CSS to the page where you put the widget, overwriting the CSS defined in the code snippet Zendesk provides.
- Omit the CSS from the code snippet Zendesk provides and write your own CSS from scratch.

In either case, you'll want to locate the following markup in the JavaScript files.

```
<div class="zd_satisfaction">
  <div class="zd_satisfaction_good">
    <p class="zd_rating_number">' + settings.ratings.good + '</p>
    <p class="zd_rating_string">' + settings.strings.goodRatings + '</p>
  </div>
  <div class="zd_satisfaction_bad">
    <p class="zd_rating_number">' + settings.ratings.bad + '</p>
    <p class="zd_rating_string">' + settings.strings.badRatings + '</p>
  </div>
  <div class="zd_satisfaction_score">
    <p class="zd_rating_number">' + settings.ratings.good + '%</p>
    <p class="zd_rating_string">' + settings.strings.score + '</p>
```

```
    </div>  
</div>  
<div class="zd_plug">' + settings.strings.zendeskPlug + '</div>
```

This should help you target the right elements with CSS.

Setting where the widget appears

By default, the ratings box widget appears on the page where you place it in your code. However, you can set an element ID where you'd like the markup placed.

Take a look at the following snippet (... denotes where the strings section has been removed).

```
Satisfaction.show({  
  ...  
  element: 'ratings'  
});
```

This must be an ID, not a class.

Displaying your last 100 satisfaction ratings

Displaying your last 100 customer satisfaction ratings is more advanced to set up than using the ratings box widget to display totals. For more information on the ratings box widget, see [Displaying satisfaction ratings totals and an overall score](#).

Zendesk provides your satisfaction ratings in JSON format. It looks something like this, where 1 is a positive rating, 0 is a negative rating:

```
[1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 0, 1, 1, 1, 1, 1, 1, 1, 1, 0,
 1, 1, 1, 1, 1, 1, ...]
```

As you can see, it is very basic. It's up to you to decide how to display the data.

You must be an administrator to use this feature.


Accessing your last 100 ratings

You need to turn on satisfaction ratings, if you haven't already done so. Then you can access your last 100 satisfaction ratings.

To turn on satisfaction ratings and access your ratings

1. Click the **Manage** icon (⚙️) in the sidebar, then select **End-users**.
Zendesk Classic: Select **Settings > End-users**.
2. Click the **Satisfaction** tab.
3. Make sure that **Allow customers to rate tickets** is selected and that you have at least 100 ratings.

If you don't have at least 100 ratings, you'll see the following message.

 **You currently have less than 100 ratings.** Public satisfaction will only work if you have 100 ratings or more. Until you gain 100 ratings, you will only see example images below.

4. Select **Allow me to display public satisfaction statistics**.
5. Click **Save Tab**.

The page updates with more information, including statistics based on your last 100 customer satisfaction ratings.

6. Go to <http://subdomain.zendesk.com/satisfaction.json> (where *subdomain* is your Zendesk account) to access the JSON file with your ratings.

Displaying your last 100 ratings

The easiest way to display your ratings on a page is to use images to represent responses.

In this example, a happy Buddha face represents a positive rating, and an unhappy Buddha face represents a negative rating.



Here is the jQuery for this example (you can use any framework or language you'd like):

```
<div id="last_100_ratings"></div>
<script type="text/javascript">
$.ajax({
  url: "https://support.zendesk.com/satisfaction.json",
  dataType: "json",
  cache: false,
  success:function(data){
    elem = $("#last_100_ratings"); // Change where you want the ratings rendered
    for (i=0;i<data.length;i++) {
      if (data[i] == 1) {
        elem.append('<div class="satisfaction_good"></div>')
      } else {
        elem.append('<div class="satisfaction_bad"></div>')
      }
    }
  }
});
</script>
```

This code snippet gets your last 100 ratings from Zendesk, then iterates through the entire length of the response (which will always be 100) and puts a smiley or sad face in the #last_100_ratings element.

Other options for using this data include:

- Add this data to a graph using jCharts or a similar program.
- Collect and store your ratings data daily so you can review historical data.
- Generate an image from it to use in email newsletters or signatures.

