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Zendesk Support - Fine Tuning Guide

Give positive user experience for your agents and customers

Ticket Views

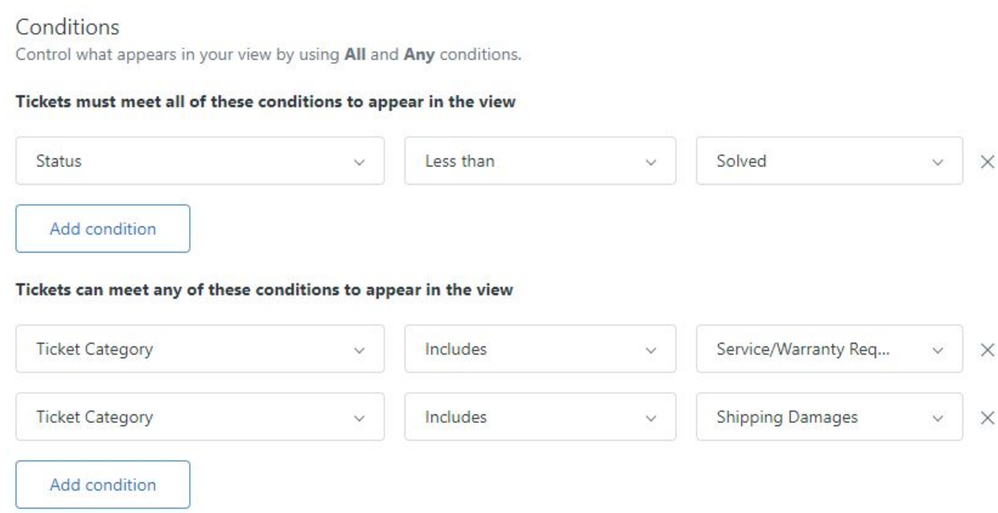
There is no one-size-fits-all approach to build ticket views. Out-of-the-box Zendesk has views built around three aspects:

1. Ticket Status (e.g. show tickets that are Unsolved, Pending, Recently Solved, etc.)
2. Ticket Assignment (e.g. show tickets that are not assigned, assigned to your group, etc.)

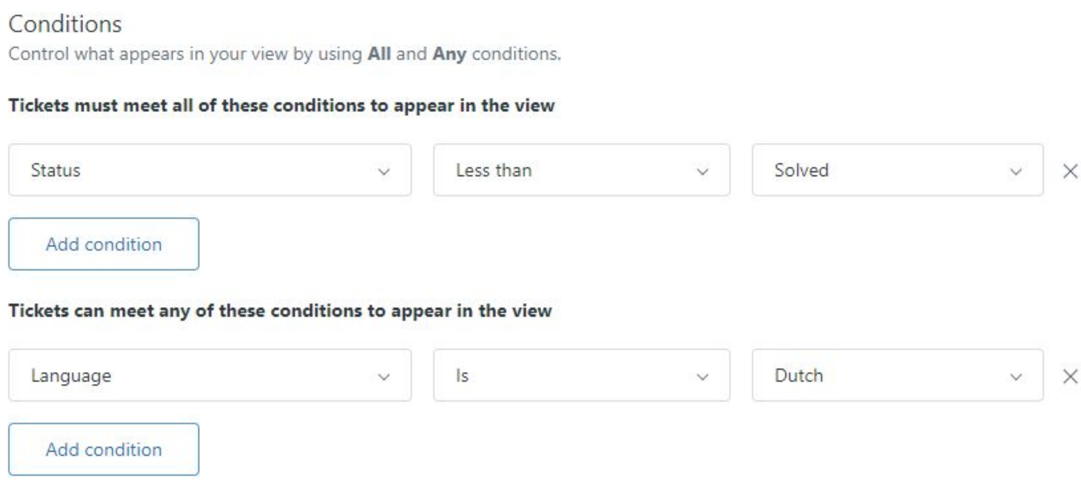
And one of the reasons they have this set up this way is to give us an example of how we could organize tickets in a way that may help our agents to solve tickets more efficiently.

For e-commerce companies, they may build ticket views based on the inquiry type. Tickets may be tagged as Order Tracking, Refund & Exchange, General Questions, etc.

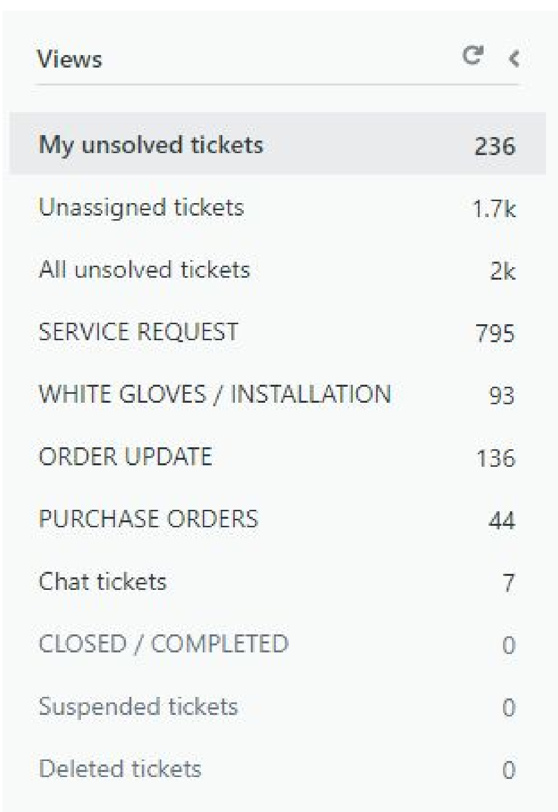
Here's an example of the criteria used to build ticket views based on inquiry type:



For companies serving customers with different locales, they may build tickets around language: English, French, German, Japanese, etc. This allows them to create ticket assignment rules based on language.



Here are examples the finished look on you Zendesk ticket views:



Question to ask yourself:

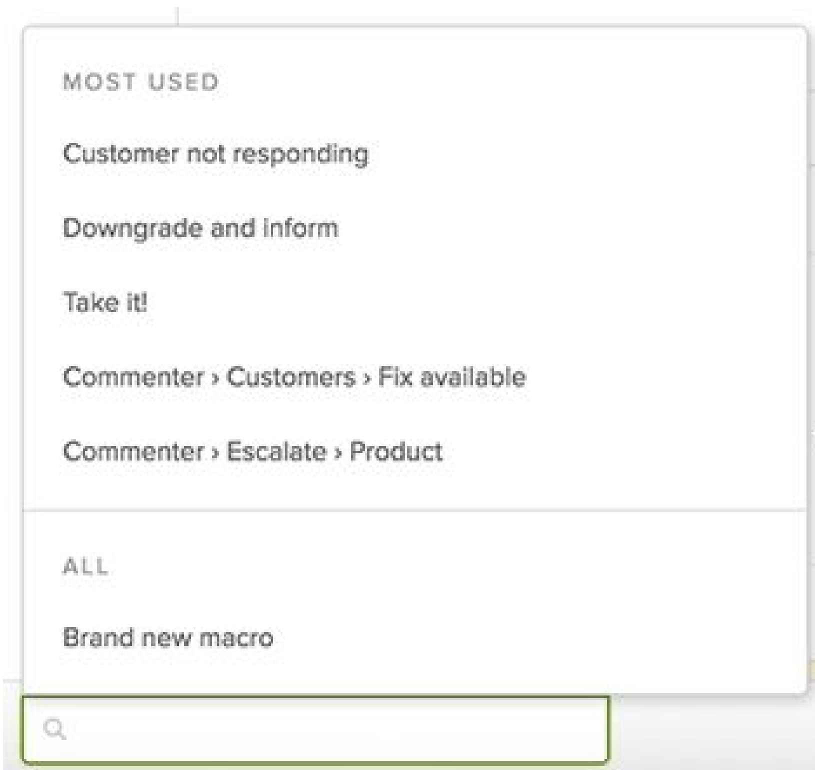
- How should your tickets be prioritized
- Which tickets should each group see?
- How di you classify you tickets?

You can view or edit your ticket views in *Admin > Manage > Views.*

Macros

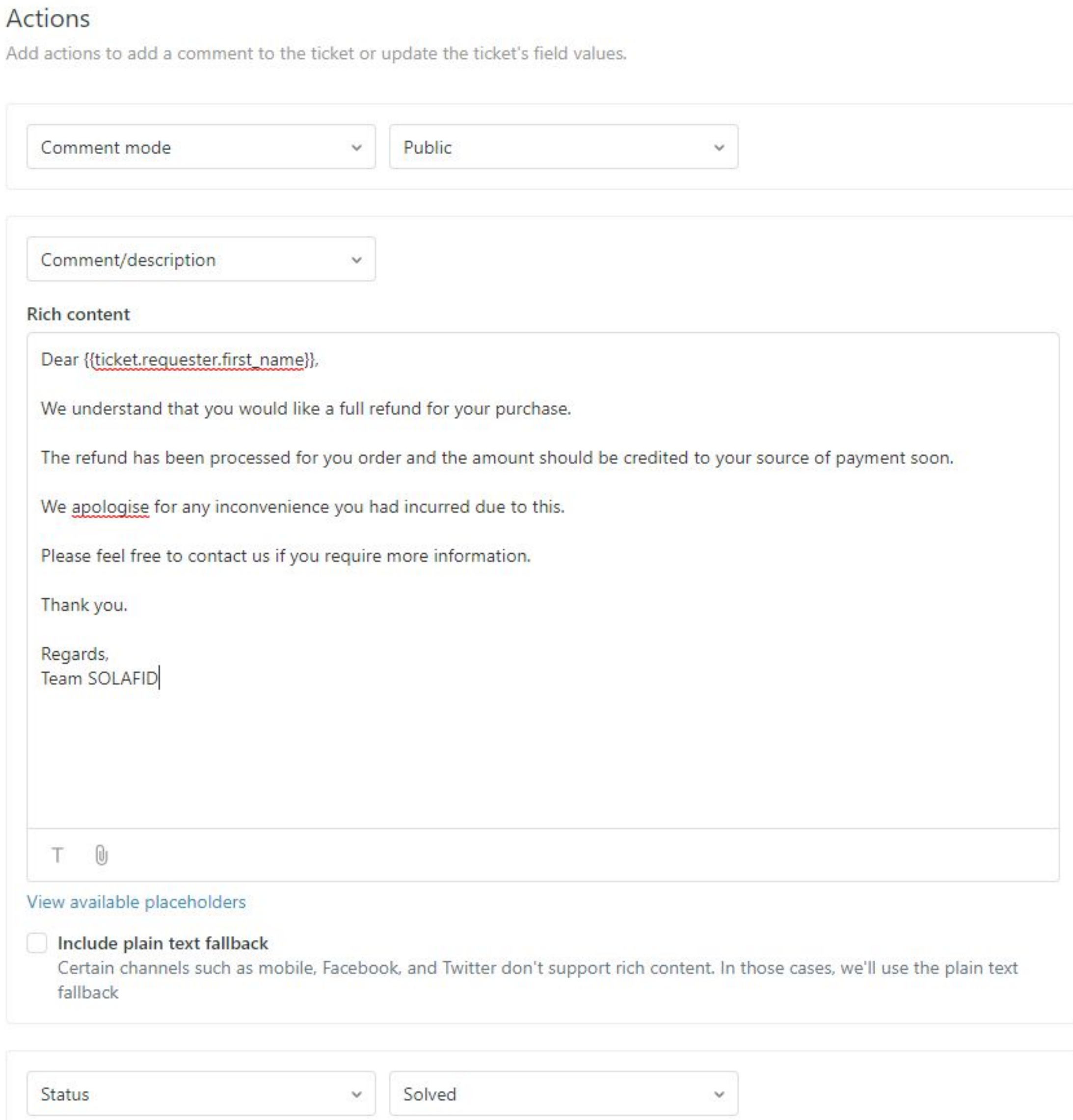
A macro is a prepared response or action that agents use to respond to support requests.Using macros on your Zendesk can reduce time and energy to respond to a customer. A macro consists of one or more actions that modify the values of a ticket's fields. Macro are applied manually to tickets by agents based on what your customer needs.

Here is an example of Macros on Zendesk.



You could also create and customize your Zendesk's macro based on what you need. For example if you get many tickets about return terms and conditions you could create a macro and name it as you would. So next time if a customer asks about the return term and condition you could use the macro and yes you save your time!

Here's an example of macro regarding refund process:



Question to ask yourself:

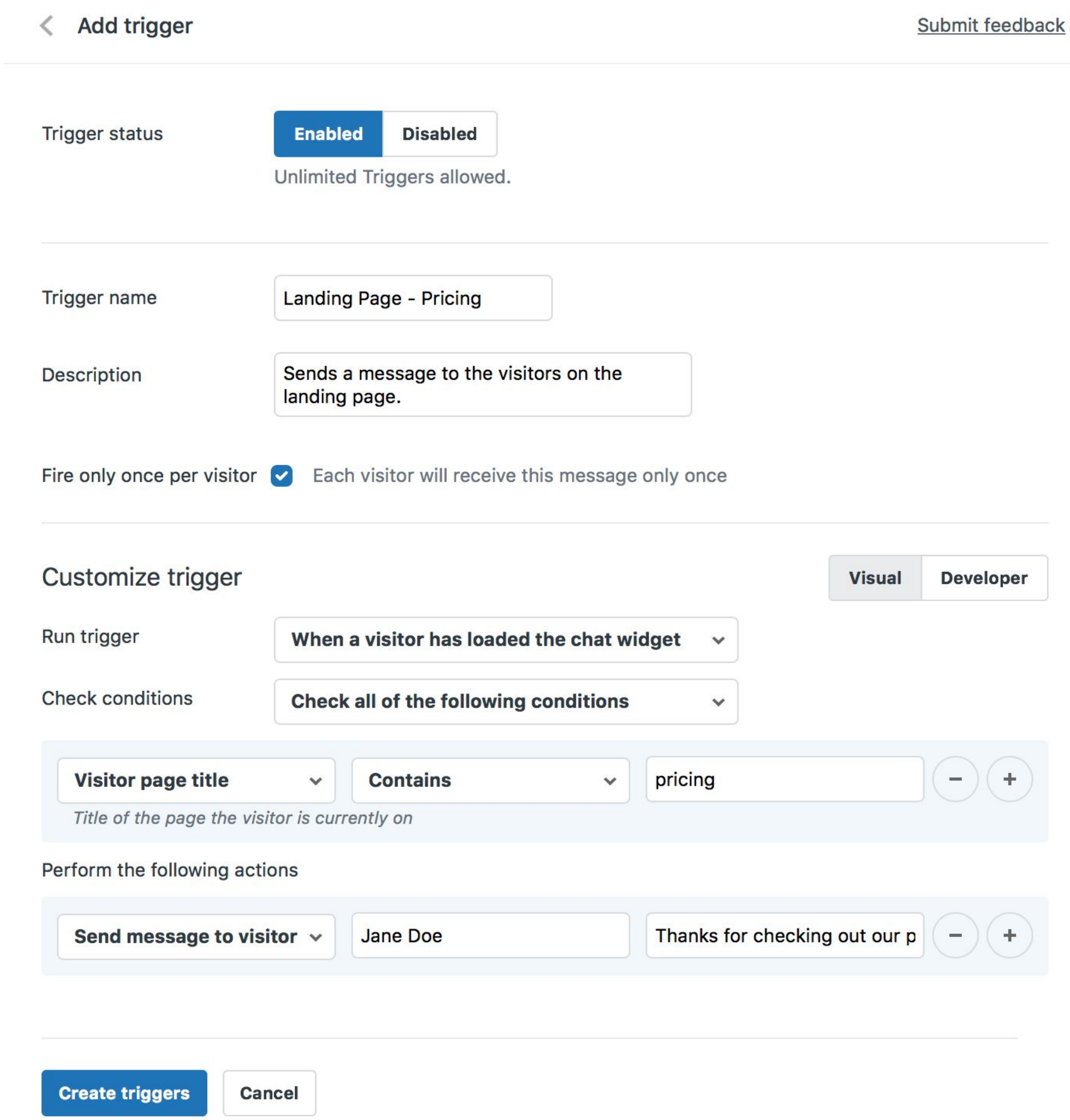
- What are the top 10 common questions your agents receive?
- What are the steps your agents need to take to solve those common questions? Can they be created as Zendesk Macro?

You can view or edit your macros in *Macros page > Locate the macros > Hover your mouse over the macros to display the options menu (.) > Edit.*

Triggers

Triggers are event-based system actions that run on either ticket creation or ticket update. Zendesk has a few default triggers that you may want to deactivate or alter but don't do it the most important trigger like the *Notify Requester of comment update*. You also don't want to have each trigger do too much because the more complicated your triggers are, the harder they will be to troubleshoot and maintain.

Here is an example of creating the new trigger:



Pro tips to create triggers is naming your trigger based on what trigger's function. The order of your triggers is important. The system will check against every trigger every time a ticket is created or updated. Our suggestion is to order your triggers in the following way:

1. Change/Update ticket values - triggers that change ticket values such as priorities, status, any other field value, or add tickets should be listed first. This is because these triggers can impact ticket assignments and notifications.
2. Ticket assignments - triggers that assign tickets to groups or individual agents should be listed after triggers that update any other value on the ticket.
3. Notifications - triggers that send notifications to users or targets should be listed last. This is because you will want the system to make any necessary changes before you send out notification emails.

Question to ask yourself:

- Do your agents live in Zendesk all day or in their email?
- Which of your agents need email notifications?
- When do they need to be notified?
- When do your end users need to be notified?
- Which items in your workflow can be automated?
- Which items in your workflow need to be automated?
- How should your notification triggers be worded?

You can view and edit your triggers in Admin > Business Rules > Triggers

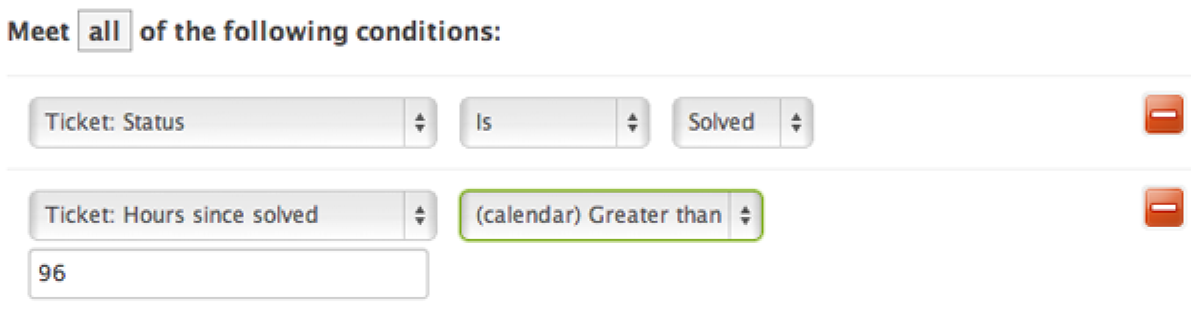
Automation

Automation is similar to triggers but the difference between them is that automations execute when a time event occurs after a ticket property was set or updated, rather than immediately after a ticket is created or updated. Automations run on an hourly basis. With automations you could do:

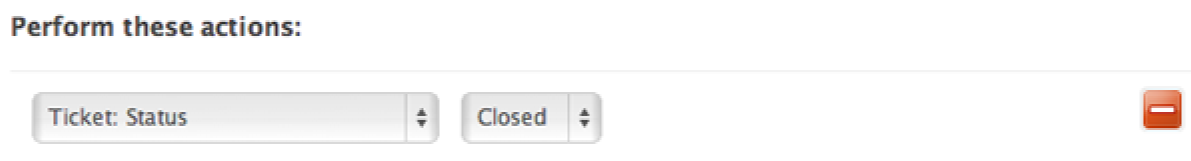
- Notify users if created or updated tickets
- Assign tickets to an agent or a group of agents
- Add/remove tags
- User or organization field values alteration

The other difference between automations and triggers is that automations allow you to perform system actions when it has been *x hours since* or *x hours until* an event in other word, not which actions they can perform but which conditions can set them off.

Here is an example of automation on Zendesk:



That automation will close tickets 96 hours after they have been solved and the close action looks like this:



After a ticket status is closed, you couldn't modify that ticket and the automations no longer affect it.

But there is potential error when using automation like if a ticker comes in even on minute after your automations run, it might still see the tickets as *0 hours since created* an hour later when they run again and when you set a hard time-based condition rather than detailed, your sutomations may not run during the hour that your ticket qualifies and put you at a risk for missing important notifications or tickets update.

Questions to ask yourself:

- Should this be a trigger or an automation?
- Do you need the system to notify you or take action when a ticket has gone stale?
- How long should a ticket be in the solved status before it is closed?
- How should your notification emails be worded?

You can view and edit your automations in *Admin > Business Rules > Automations*

Sources:

- https://support.zendesk.com/hc/en-us/articles/203661246-Best-practices-for-creating-views
- https://support.zendesk.com/hc/en-us/community/posts/360004392007-Full-circle-Save-time-on-every-support-ticket-with-macros
- https://support.zendesk.com/hc/en-us/articles/360001996987-Fine-Tuning-How-to-build-your-ideal-workflow
- https://support.zendesk.com/hc/en-us/articles/360001996987-Fine-Tuning-How-to-build-your-ideal-workflow#h_36616170911539034461723
- https://support.zendesk.com/hc/en-us/articles/203662236