

Zendesk Support - Fine Tuning Guide

Give positive user experience for your agents and customers

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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:

Conditions

Control what appears in your view by using **All** and **Any** conditions.

Tickets must meet all of these conditions to appear in the view

Status	Less than	Solved	×
<input type="button" value="Add condition"/>			

Tickets can meet any of these conditions to appear in the view

Ticket Category	Includes	Service/Warranty Req...	×
Ticket Category	Includes	Shipping Damages	×
<input type="button" value="Add condition"/>			

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.

Conditions

Control what appears in your view by using **All** and **Any** conditions.

Tickets must meet all of these conditions to appear in the view

×

Tickets can meet any of these conditions to appear in the view

×

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

Views	
My unsolved tickets	236
Unassigned tickets	1.7k
All unsolved tickets	2k
SERVICE REQUEST	795
WHITE GLOVES / INSTALLATION	93
ORDER UPDATE	136
PURCHASE ORDERS	44
Chat tickets	7
CLOSED / COMPLETED	0
Suspended tickets	0
Deleted tickets	0

Views	
Your unsolved tickets	138
Unassigned tickets	153
All unsolved tickets	363
DE - All Tickets	57
NL - All Tickets	80
SE - All Tickets	29
FR - All Tickets	1
PL - All Tickets	62
EN - All Tickets	38
Disputes Tickets	3
Other Tickets	34
Pending tickets	7
Suspended tickets	75
Deleted tickets	0



Question to ask yourself:

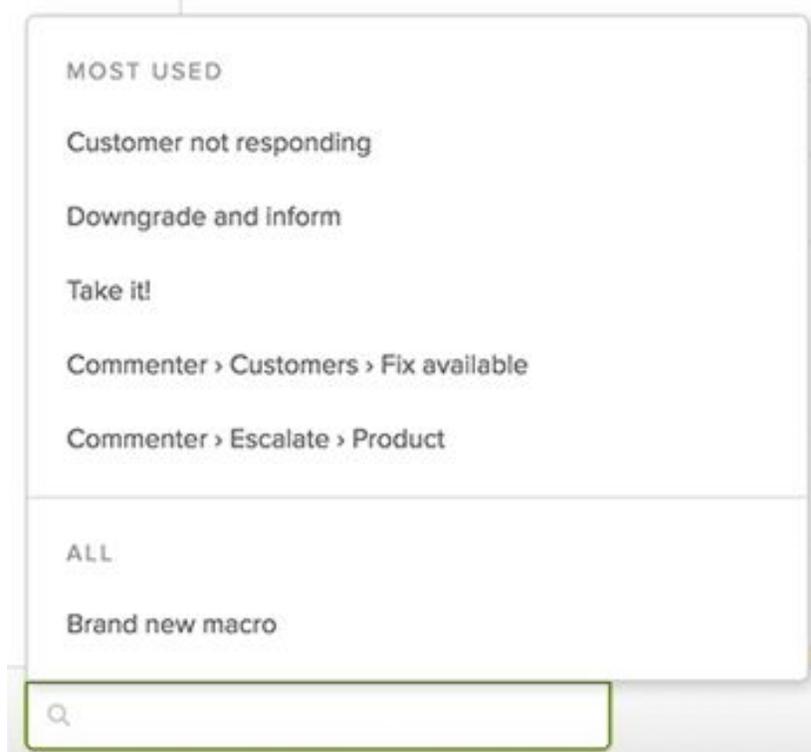
- How should your tickets be prioritized
- Which tickets should each group see?
- How do you classify your tickets?

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. Macros 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:

Actions

Add actions to add a comment to the ticket or update the ticket's field values.

Comment mode Public

Comment/description

Rich content

Dear {{ticket.requester.first_name}},

We understand that you would like a full refund for your purchase.

The refund has been processed for you order and the amount should be credited to your source of payment soon.

We apologise for any inconvenience you had incurred due to this.

Please feel free to contact us if you require more information.

Thank you.

Regards,
Team SOLAFID

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[View available placeholders](#)

Include plain text fallback
Certain channels such as mobile, Facebook, and Twitter don't support rich content. In those cases, we'll use the plain text fallback

Status Solved



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:

[← Add trigger](#) [Submit feedback |](#)

Trigger status **Enabled** Disabled
Unlimited Triggers allowed.

Trigger name

Description

Fire only once per visitor Each visitor will receive this message only once

Customize trigger **Visual** Developer

Run trigger

Check conditions

Title of the page the visitor is currently on

Perform the following actions

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:

Meet **all** of the following conditions:

Ticket: Status	Is	Solved	-
Ticket: Hours since solved	(calendar) Greater than		-
96			

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

Perform these actions:

Ticket: Status	Closed	-
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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 ticket 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 automations 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>