# How to Get a Help Desk Up and Running in a Day

May, 2011

zendesk

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## Introduction

Zendesk is so easy that support managers can get their help desks up and running in a day. In fact, many claim that they've set up their help desks in just 15 minutes. Now it's time to prove it to yourself.

For those of you who don't know Zendesk, it is the proven cloud-based help desk software that is the fastest way to enable great customer service in rapidly growing companies. Zendesk is so easy to use, it's loved by support teams and their customers worldwide. More than 10,000 organizations including Adobe, MSNBC, Sony, OpenTable and Groupon, trust Zendesk with their most valuable asset, their customers. Now, organizations can deliver exceptional support across the web, email, and social media. With the mobile device explosion having created even more opportunities to help customers anywhere, any time, Zendesk is also available across devices such as the iPad, iPhone, BlackBerry, and Android.

"Within 15 minutes we had our customized help desk running and were able to receive tickets. You are able to learn as you go. You can use Zendesk right away then grow into the advanced features comfortably and at your own pace."

*– PAUL BICKNELL*
*ONDEMAND OPERATIONS MANAGER,*
*SAP*

## Easy to Get Started: Free 30-Day Trial

If you haven't already started using Zendesk, you should start your 30-day, free trial immediately. Simply go to www.zendesk.com/signup to register for your free trial. Note that the trial is the complete, fully functional product. And, you don't even have to provide your credit card; we are so confident that once you start using Zendesk, you'll love your help desk. So get started now.

## Jumping In and Solving Your First Ticket

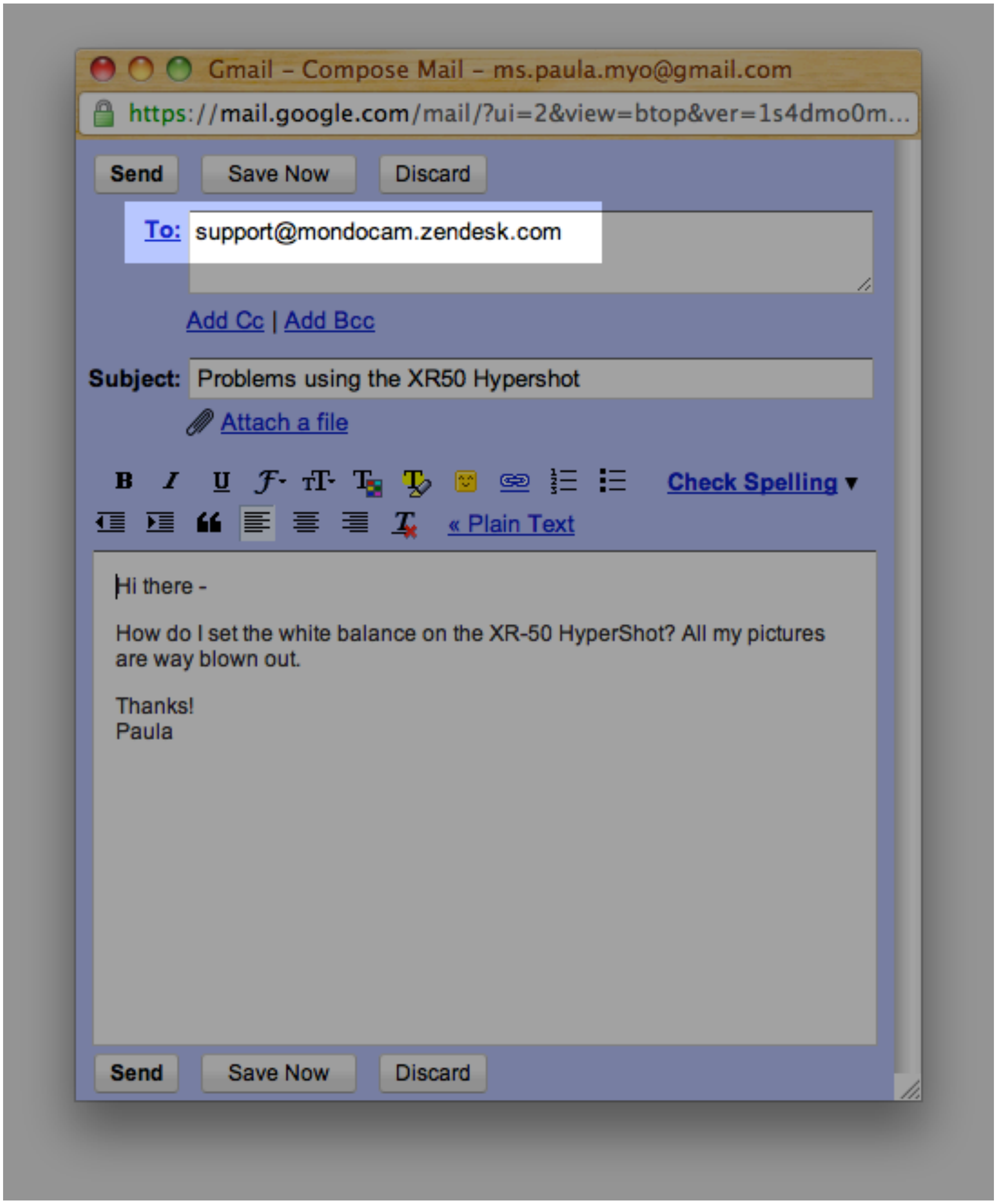
Zendesk begins with the "ticket." Whenever a support request is received in Zendesk, a ticket is created. The ticket then becomes a record of each one-to-one customer conversation you have. Tickets can be created through multiple channels: email, your website, social media, online chat, phone, and more. Wherever these conversations are started, they all become tickets.

Once the support ticket has been submitted, your goal is to resolve it as quickly and efficiently as possibly, whether it's a simple question about how your product works, or a major customer problem. In each case, the support conversation goes through a series of stages. The ticket might require your attention or it might be waiting on some information from the customer; eventually, it is resolved.

Zendesk comes set up to work with email. When you signed up for your Zendesk account, you were given a Zendesk support email address: support@youraccount.zendesk.com where "youraccount" is the site name you signed up with. You can see your account name in the URL displayed in the address bar. Note that you can easily change this email address.

Let's try it out. You're going to send an email to this address. Note that if you are an administrator, it's important that you send any test emails from a different email account than the one you use with your administrator account. Since your Zendesk recognizes your email as the owner of the account it treats you differently than it does one of your customers. In general, it's good to have a separate email address that you use to test your Zendesk. This gives you the opportunity to experience Zendesk the way your customers will.

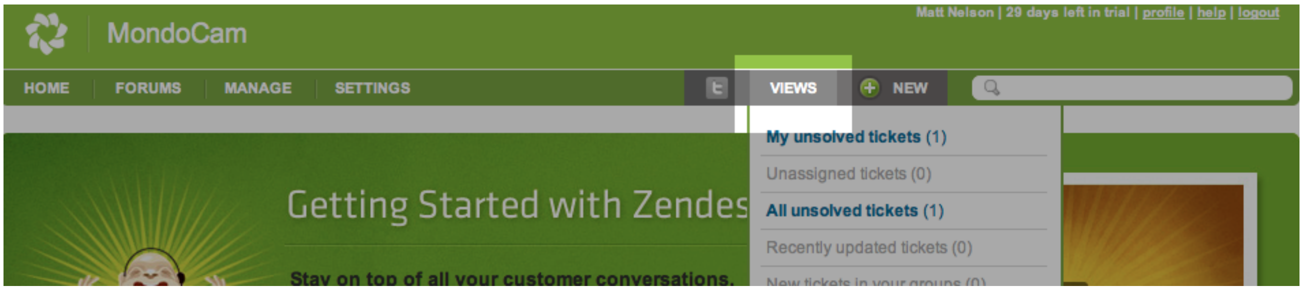
Open up your email and send an email as if from a customer to your Zendesk support address (i.e. support@youraccount.zendesk.com). Our account is called MondoCam - an international camera company we use for demo purposes. So in our case, we are sending the email to support@mondocam.zendesk.com



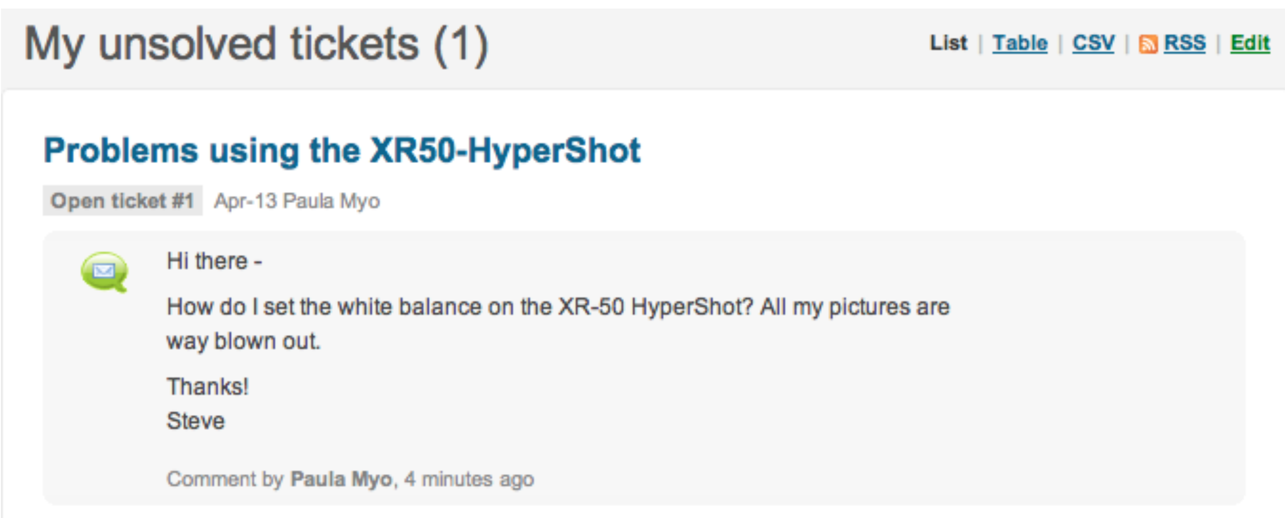
You can write whatever you want, but it can be helpful to write something you might actually see from a customer. That's it! Your first support ticket submitted.

## Seeing and Replying to Support Tickets

Back in our Zendesk account, let's see where that email ended up. Once a customer sends you a ticket, it will be automatically converted to a ticket and show up in your Views. To see those, hover over the View tab in the top navigation.




Views are like custom inboxes for your support tickets. The default view is called My Unsolved Tickets, which shows you any ticket that you haven't deemed solved yet. The ticket you just sent in will show up here. Click on My Unsolved Tickets.




There it is. Click the title of the ticket to open it. The ticket is where you respond to the customer; but the ticket will also keep a log of all the subsequent communication between your team and the customer. Let's go ahead and respond to this ticket now.

We want to ask the customer for more information. To do that, add a comment below the initial one asking for more information. Simply type your response in the text box.

Next we'll change the drop-down fields on the ticket labeled Status, Type and Priority. Zendesk can add and keep track of a support conversation's details by setting these drop-down fields, or as they are called in Zendesk, Ticket Fields. You can modify these ticket fields as well as add your own.

The status field says "open." A Zendesk ticket can have one of five statuses, each of which marks a different stage along the path from a customer submitting a request to your agents solving it.

1. New - a ticket that has just come in and hasn't been opened yet.
2. Open - a ticket that has been opened and requires attention. Open tickets are the ones that are currently on your plate.
3. Pending - a ticket that is waiting on another party, usually the customer. Use this for when you are waiting on a customer reply.
4. Solved - means the ticket has been deemed resolved. Can still be re-opened however.
5. Closed - once a ticket has been solved for a number of days, it is officially (and automatically) closed. Closed tickets are archived and cannot be reopened.

In this case, we are asking the customer to send us more information, so change the status of the ticket to pending. By changing the status, we help ourselves organize our tickets into ones that require attention and those that we can't work on at the moment.

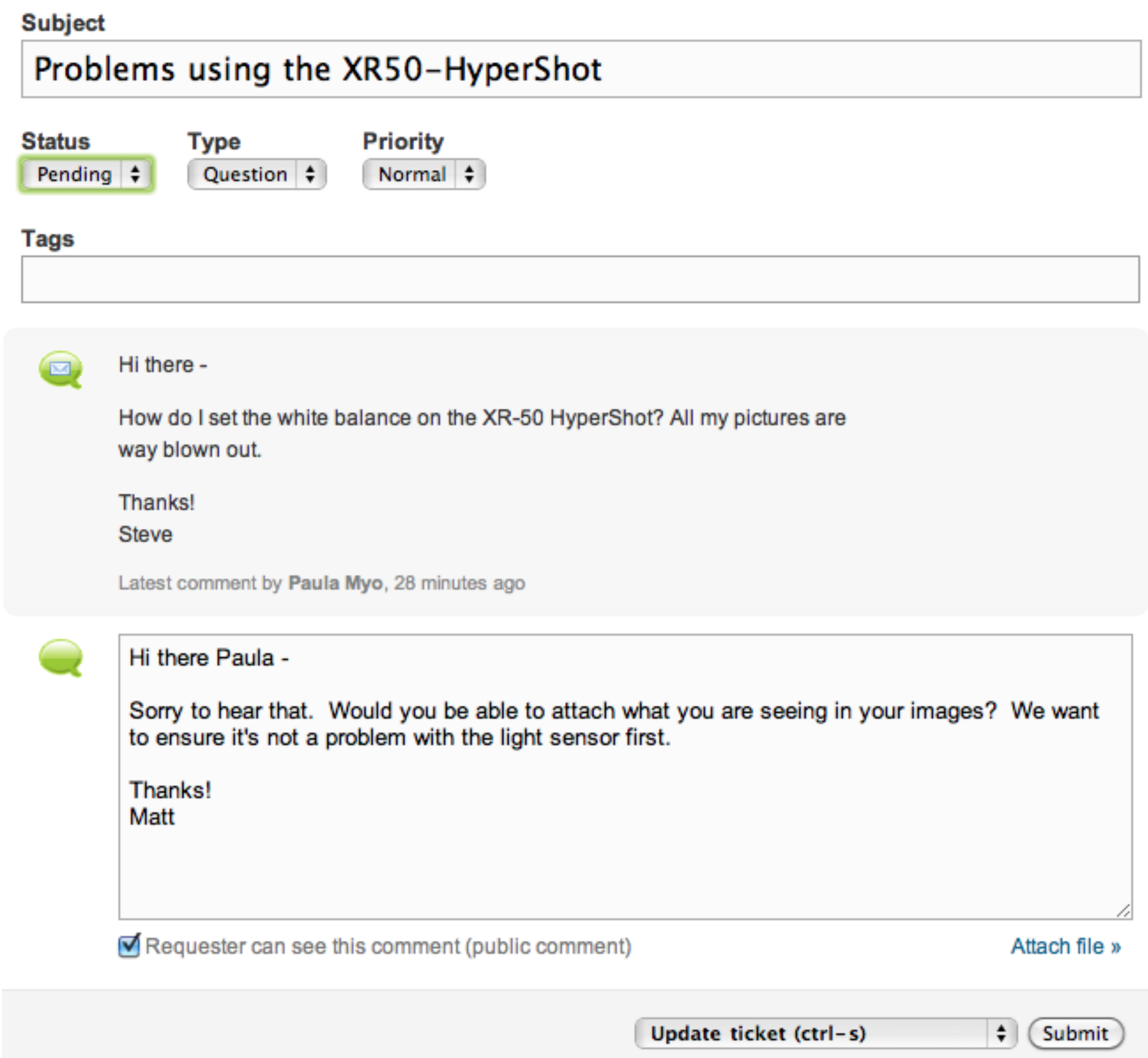
> "Zendesk is so easy to use. We had it up and running in a day. Zendesk enables our support process naturally without creating additional work, giving us the tracking and metrics we need to manage our operation."
>
> – JARED MANLEY, SUPPORT DESK MANAGER, MSNBC.COM

Next, is the Type drop-down field. Like status, there is a number of ticket types. The type describes what kind of issue you are dealing with. There are four ticket types; and depending on which you choose, you get a different set of features.

1. Question - the most basic type; for when a customer has a question about your business or service.
2. Problem - for when a customer has a problem with your business or service
3. Incident - are specific instances of problems. For instance: if the problem is that our billing system is down, each ticket that comes in after we identify the problem is an incident of the problem. This lets us group our tickets together around a common issue.
4. Task - are for tickets that turn into a to-do item for your agents. They can have a due date.

Because the customer is asking a question about our product, we will change the Type field to Question. We might change that later as we gather more information. Lastly, because we aren't sure exactly what is going on yet, let's set Priority to Normal. You could also choose Low, High, and Urgent. Priority is another ticket categorization tool.

Ok, your ticket should look something the one on the following page:




We are now ready to reply to the customer. To do so, click the submit button under your comment. This will update the ticket with all the changes we just made and send out our reply to the customer.

Zendesk returns you to your Unsolved Ticket View with a message that you've updated your ticket.

## What Your Customer Sees

When you click submit, Zendesk sends out your comment to the customer. Let's see what this looks like. We'll check the email account we used to send in the test support request.

You will see two replies:

1. Your Request has been Received
2. An update with the comment you just added.

These replies were automatically sent out by your Zendesk through something called a Trigger. Triggers are automatic actions that occur when tickets are created or updated. They act like this: “if A happens, then do B”. So for instance:

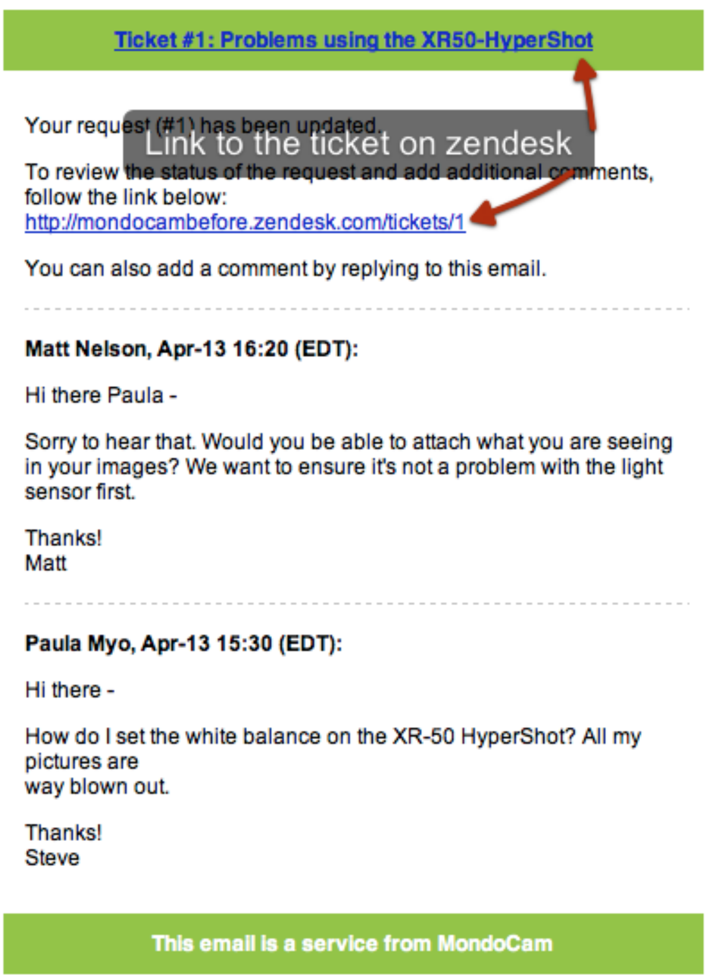
1. When a customer submits a ticket
2. Zendesk automatically replies and acknowledges that the request has been received.

That’s where that first email came from.

But a trigger also sent out our second email:

1. When you make a comment on a ticket
2. Zendesk automatically sends that comment back to the customer.

The subject line of the second email should read something like “[MondoCam] Re: Problems using the XR50-HyperShot”.



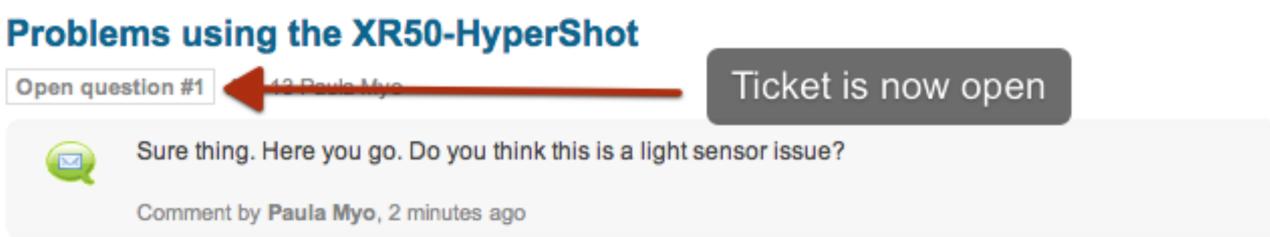
It has both your comment and the original request for support. There is also a link back to the ticket. The trigger that sent it out controls all of this. Triggers are powerful tools in Zendesk.

## How Your Customer Replies

Now that you know how to communicate with your customer, how does your customer respond? As the email says, “You can add a comment by replying to this email”. Let’s try it here.

If you hit reply and type out a response from the customer perspective. In our example we asked for the customer to attach an image. Go ahead and try this as well, attach an image to your email and click send.

Go back to your Zendesk and return to the My Unsolved Ticket view (click the View tab to get there). There’s your ticket, with the customer reply showing. Notice too that ticket status has changed from Pending to Open.

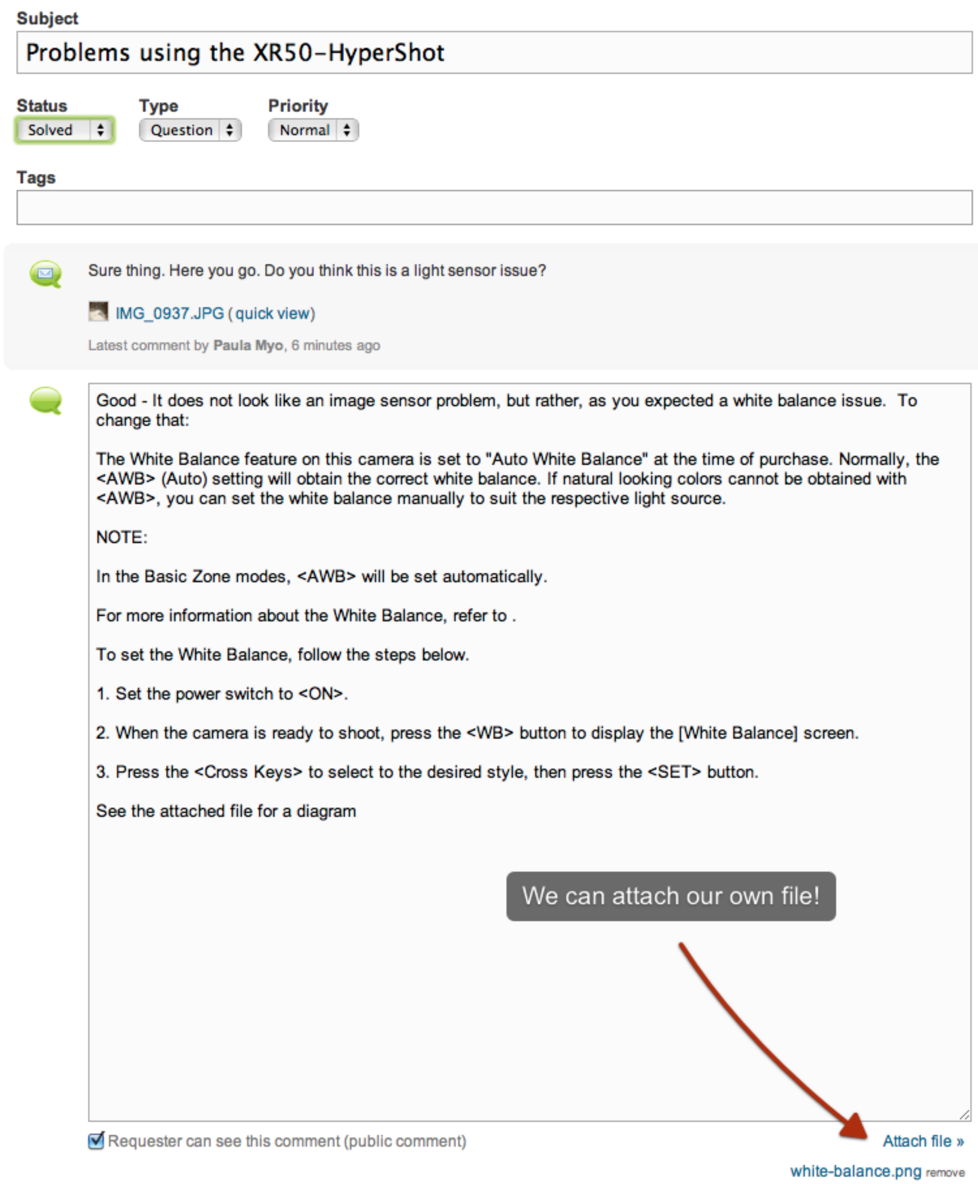



Since the customer replied, you are no longer waiting on them. This reopens the ticket and puts it back on your plate.

## Solving a Ticket

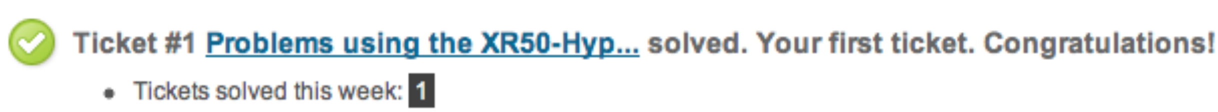
Let’s resolve this issue now. Click in to the ticket. There is the customer response along with the image we attached - cool! You can click quick view to see your image right from within the ticket.

Now we have enough information to solve this ticket. We will respond with the answer to their question; and we can change the status to Solved in the drop-down menu. Your ticket should look something like this:




Notice that we can also attach files to tickets. Just click the Attach file link in the lower right of the comment box. Once we are satisfied that we have successfully trouble-shot the customer's issue and answered their question, we can hit submit.

It is easy as that! We just solved your first ticket. Your Zendesk even tracks your weekly progress by telling you how many tickets you've solved.

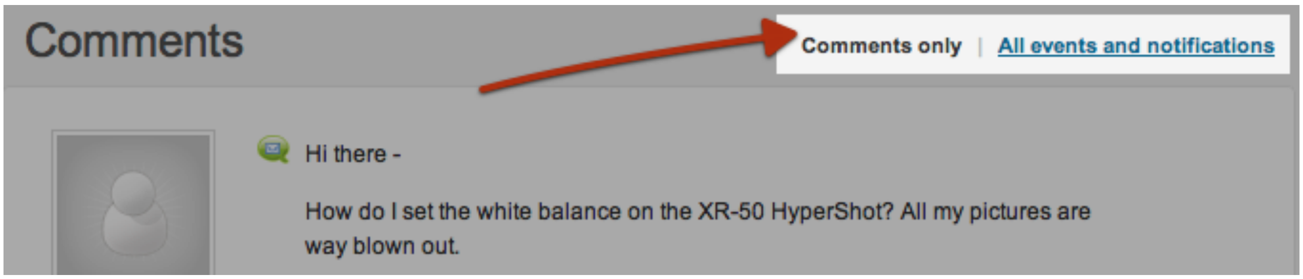


## Reviewing a Ticket's History

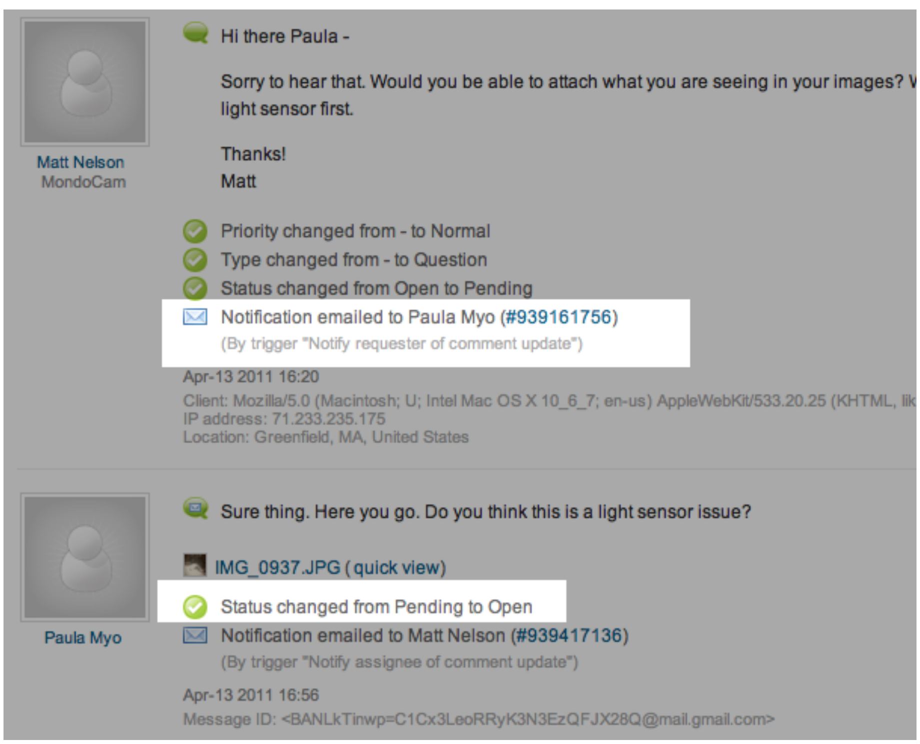
We just went through a pretty typical support interaction in Zendesk. A customer contacted us with a question; we troubleshot the issue; and ultimately answered their question. But Zendesk not only helps us to resolve the issues; it keeps a history of all the activity. Let's review the ticket history.

To return to our ticket, click the Recent tab in the top menu bar. This gives you quick access to any tickets you handled recently.

Now in the ticket, click the All Events and Notifications link. It is in the top right of the Comments section.




This shows us every change that occurred on our ticket. You can see the changes we made manually like changing the Type to Question; as well as the automatic actions taken by Zendesk - such as the Trigger that sent out the Notification Emails when we added new comments, as well as when the customer replied and the ticket went from Pending to Open.




Notice too that a notification was sent out when we solved the ticket.

# Conclusion

There you go, your help desk is up and running. You saw how Zendesk receives support requests through email and turns them into tickets. And then you went through the basic steps you take to resolve that request within Zendesk.

Now that you have the basics down you can start to take advantage of some of Zendesk's other features and tools. In addition to email, for instance, Zendesk can receive support requests from multiple channels, including web site forms, live online chat, and Twitter.

You can also diving into Triggers more to see how they can automate and accelerate a lot of your support tasks; and discuss how you can organize your customers and agents into groups.

The best thing about Zendesk is that you can get started right away, and continue to customize as you go along. To continue, once you start you Trial you can look at our complete Getting Started Guide at https://support.zendesk.com/forums/20025588-getting-started-guide

# How To Get Started

Visit us to sign up for a free 30-day trial with full access to all features at www.zendesk.com/signup.
Contact Zendesk to get started at +1-888-670-4887 or email sales@zendesk.com.

# About Zendesk

Zendesk is the leading provider of proven, cloud-based help desk software. For growing organizations, Zendesk is the fastest way to enable great customer service. More than 10,000 Zendesk customers, including Adobe, MSNBC, Sony, OpenTable and Groupon, trust Zendesk with their most valuable asset, their customers. Founded in 2007, Zendesk is funded by Charles River Ventures, Benchmark Capital and Matrix Partners.

Learn more at www.zendesk.com.

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