Self-service is crucial as it offers customers speed and convenience, making them more likely to appreciate the service. This is why a well-organized knowledge base plays a vital role in customer experience strategies. Our help center software organizes knowledge, allowing customers and agents to access information freely. By giving customers autonomy to resolve their issues on their own terms, we empower them to take control of their experience. Agents benefit from this by keeping the knowledge up-to-date and useful for everyone involved. Self-service reduces support costs and ticket volume, enabling agents to focus on more complex issues and offer meaningful assistance. As self-service becomes increasingly essential, businesses must build a robust knowledge base with relevant content that addresses customers' primary concerns. Continuous improvement of self-service capabilities is vital, especially as more customers seek to resolve their issues independently. This is where Zendesk Guide comes in – a smart knowledge base designed to enhance self-service and empower customers and agents. To get started with Zendesk Guide, we provide key tips on building a quality knowledge base, improving agent efficiency, and optimizing self-service capabilities. Building blocks for creating business rules that impact ticket routing, security, and views are essential. Ensure comprehensive agent groups with consistent naming and clear definitions before launching setup. This feature is available on all Zendesk Support plans. Agents can be grouped based on supported channels or functions performed. Clear roles matter as they manage ticket views. Purposeful group names match their function. Roles are collections of permissions defining actions users can take, such as updating tickets or editing user profiles. Each user has only one role. Preparing for workflow planning before assigning roles is essential. Role definitions vary depending on the Zendesk Support plan version. Support Enterprise has predefined agent roles and custom roles can be created. Custom roles include unique permissions and visibility. In Professional plans, roles include end users, agents, and administrators. Best practice is to avoid creating individual user roles due to scalability issues. Limiting Admin users (5 or less) maintains account control. Agents require roles but not assigned directly. Custom user fields add details about customers, applied to all users, viewable in tickets. Examine existing customer records for planning custom fields. Complete workflow planning before importing custom fields. This feature is available on all Zendesk Support plans. Customizing User Profiles with Custom Fields ------------------------------------------- In Zendesk Support, custom fields in user profiles enable the collection of specific information that is unique to each individual user. This can include license numbers, driver's license numbers, or other details relevant for customer contact. Best practices focus on collecting data relevant to individual users, such as license numbers, while avoiding unnecessary fields that may create noise when reviewing user profiles. In contrast, organization fields are used to store information applicable to collections of users, like location or time zone. These fields should be added to organizations first, rather than user profiles, and only include necessary details for routing or prioritizing tickets. Custom organization fields can be created before establishing organizations, allowing for a clear understanding of the groups being created. Examples of such fields may include contract agreements or service levels for supported companies. In a specific organization within Zendesk, groups of users can be separated by product type, brand, or language. This feature is available on all Zendesk Support plans. Organizations can be used to ensure that customers speaking the same language are served by agents who understand them. When creating organizations, it's possible to be as detailed as needed. For example, a separate organization for VIP French clients with telecommunications queries can be created, and triggers can be set up to route tickets automatically to the right agent. When using Zendesk for HR issue tracking, ensure that users within an organization cannot see each other's tickets. Organizations can be imported in bulk from CSV files or synced with CRMs through apps available on the Zendesk Apps Marketplace. This keeps organizations up-to-date and reduces manual input. The support experience is a collection of contact points including email addresses, help centers, social media, and embedded Zendesk links. A brand is a customer-facing identity represented by these contact points and can have from 5 to 300 different brands depending on the plan. Customization options include modifying data required for support requests and customizing email notifications with company branding. Administrators can manage large companies with multiple brands using a single Zendesk account. A brand includes support addresses, help centers, and email replies. By defining brands, tickets can be routed to appropriate agent groups and proper identification included in outgoing messages. Brands should differentiate their support services based on customer types, such as kosher, vegan, or healthy choice products. Electronics companies may use separate brands for consumer and corporate customers. Most channels have a brand value, allowing specific configurations of help center, messaging, Web Widget, Chat, and Facebook for individual brands. You can add multiple support addresses to provide alternative ticket submission options for end users. These addresses can be variations of your Zendesk email address or external email addresses. Before creating support addresses, complete workflow planning, define user groups, and add branding. This feature is available on all Zendesk Support plans, including Professional and Enterprise. Best practices include matching ticket issues with support addresses and considering customer experience when configuring these addresses. Adding business schedules can acknowledge agent availability and give customers a better sense of response times. Define base schedule first, then add holidays as needed. Your account can create multiple schedules. You can also set up a schedule with business hours and holidays. A ticket represents the conversation between an agent and customer. Ticket fields are stored in the sidebar, allowing you to store information, route, and prioritize each ticket. Zendesk includes default fields that you can customize as needed. Before customizing, ensure you have completed workflow planning for your account, defined user groups, and set up branding (if available). You must also have a support address. For reporting purposes, it's advisable to position the elements at the bottom of the form, while placing essential information near the top to minimize scrolling. To enhance email notifications from your Zendesk account with a recognizable corporate identity, customize their templates and content. Zendesk allows you to personalize both HTML and plain text email formats for branding. Customize the HTML template by altering the style elements such as font type and colors to match your brand. Similarly, edit the information within the text versions of emails but be aware that changing the trigger controlling an email notification requires editing it first. With social and business account single sign-on, users can authenticate with their preferred platforms such as Facebook, Google, or Microsoft accounts. To configure single sign-on, prerequisites include workflow planning, user access and security management, branding, people management, other products, and workflows. Single sign-on is available on all Support plans for both social and business use cases. Configuring social single sign-on allows customers to log in with their Facebook credentials, granting them access as end users to the Zendesk account. Using enterprise single sign-on provides complete control over users behind a company's firewall, allowing for secure authentication against the user authentication system and access to multiple resources both within and outside of the firewall. Security settings in Zendesk ensure private information protection and allow custom sign-in settings configuration. This includes setting password security levels for agents, admins, and end users, as well as configuring single sign-on for a seamless login experience or multifactor authentication for extra security. All Zendesk Support plans support single sign-on solutions using JSON web token (JWT) and Secure Assertion Markup Language (SAML). A comprehensive access plan that meets corporate standards is essential. Security and user settings work together, requiring completion of workflow planning, people management, branding tasks, and setting up security before configuring user settings. This feature is available on all Zendesk Support plans. To configure the most effective support system for your business, make your Zendesk account accessible to anyone while maintaining a level of control over spam submissions. Utilize the 'Anybody can submit tickets' setting, allowing users to complete CAPTCHA image verification before submitting a ticket if needed. For self-serve situations, enable user registration using an online form to allow users to sign up for support independently. Enhance your user settings by enabling user tagging, which enables you to assign relevant tags to users, making it easier to control your workflow and manage specific tickets or workflows based on those tags. Zendesk offers a wide range of integrations with external apps and services through its Marketplace. Integrate popular applications such as Salesforce, JIRA, or Slack into your Zendesk account to streamline user data management and ticket flows across different platforms. To customize your support experience further, explore the Zendesk Marketplace for hundreds of free and paid apps that can enhance specific aspects of your business operations. Additionally, utilize notifications to external targets when a ticket is created or updated, allowing you to notify cloud-based applications and services directly from your Zendesk account. You can enhance features and optimize business processes by integrating applications with Zendesk. Before adding integrations, ensure you have completed workflow planning, managed people, branding, and security tasks for your account. It's also crucial to understand how data will be transferred and maintained between Zendesk and other third-party applications. This feature is available on all Zendesk Support plans, but typically requires administrator permission in both Support and the third-party application. For example, integrating Slack with Zendesk Support allows ticket submissions and status changes to appear as notifications in specified Slack channels, enabling users to create new tickets directly from Slack and comment on tickets from their Slack notifications. The ZIRA field syncing feature enables near real-time syncing of data between Zendesk Support and JIRA. To save time, consider integrating applications that agents usually access in other browser windows. If you have an Enterprise account, setting up contextual workspaces can present agents with ticket tools and features based on specific workflows. When creating or updating a ticket, it's useful to notify external systems and services, such as apps or email, to ensure agents receive updates across various tools. Notifying external targets enables your agents to stay informed and make timely decisions. To do this, complete workflow planning, manage people, branding, and security tasks for your account, and configure third-party systems and services. You must be familiar with configuring webhooks to send notifications and configuring the external system or service to receive notifications. Once set up, webhooks can be used in automations and triggers, available on all Zendesk Support plans. For instance, you can alert your team in Slack when an urgent ticket has been unattended for more than 48 hours or notify your back-end service about an important ticket event. However, be conservative when choosing to notify external systems and services to avoid excessive noise and reduce urgency. Focus on what agents really need to know. With the building blocks in place, you can set up workflows with external apps and automate workflows using business rules, route tickets to agents, and create views of tickets based on various criteria, such as channels or groups. For automated routing, you can set up omnichannel routing to assign tickets to available agents based on status and capacity. You can create custom skills that will be used in business rules for triggers and automations. If you plan to use these skills, it's best to create them first and assign them to agents later. If you're not familiar with Zendesk's routing and workflow tools, here's a quick rundown: Triggers are event-based rules that run immediately after tickets are created or updated, while automations perform actions based on time elapsed. Views can dynamically organize tickets based on specific criteria, and macros allow agents to apply pre-defined sets of actions to tickets with one click. Service Level Agreements (SLAs) ensure timely responses and resolutions, enabling agents to prioritize tickets effectively. When setting up omnichannel routing for a larger support team, you'll want to consider agent availability, determined by both their status and capacity. This feature is available on all plans but requires certain prerequisites to be completed beforehand. Some features, such as priority-based routing, are only available on Professional and Enterprise plans. Agent Workspace must also be activated, and live chat cannot be used concurrently with omnichannel routing. Before setting up skills-based routing, decide on the necessary capacity rules and unified agent status for your team. You can start with Zendesk's default settings and adjust as needed based on your observations. This method is impractical for larger teams where agents can't be experts in every product area or language. Skills-based routing solves this issue by pairing tickets with the right agents, ensuring faster resolution. Agents are assigned characteristics called skills, which include languages, locations, or technical expertise. Once defined and assigned to agents, tickets are routed accordingly. It's essential to define a set of skills for your Zendesk account first but don't assign them yet. Complete prerequisites like workflow planning and user access before creating skills. Note that skills-based routing is only available on Support Enterprise plans, so if you're using another type of account, skip this task or choose between omnichannel routing and skills-based routing. Examples include agents specializing in different operating systems like Windows, UNIX, or Android. Experienced agents can be routed escalated tickets or VIP customer issues. Setting up skills-based routing involves investigation, strategizing, and planning to determine the necessary skills, agent assignments, and rule replacements. Ensure a solid set of skill definitions before adding them to Zendesk. Triggers are event-based business rules that save agents time by intelligently processing tickets based on conditions. They're cause-and-effect statements where an action is performed if a ticket meets specific criteria. You can create unlimited triggers according to your needs, such as automatically replying to customers or assigning high priority to VIP customer tickets. Prerequisites for triggers include workflow planning and user access. If applicable, set up skills-based routing first. Be cautious when using Zendesk's default triggers and consider deactivating or altering them before going live to avoid unwanted messages in your inbox. **Triggers and Automations in Zendesk Support** * Triggers are event-based business rules that can fire every time a ticket is created or updated. * They can be used to: + Notify customers of out-of-office hours + Route priority customers to specialized support groups automatically + Send customer satisfaction score follow-ups + Notify agents when a problem ticket has reached a certain number of incidents * Best practices for triggers include being specific in their conditions and considering the order of triggers to avoid unexpected effects. * Triggers can be viewed to troubleshoot any issues. **Automations in Zendesk Support** * Automations are time-based business rules that perform an action based on time elapsed. * They can be used to escalate priority levels and notify managers when a ticket hasn't been answered in a timely manner. * Prerequisites for creating automations include workflow planning, managing people, branding, user access and security, and other products (if applicable). * Automations run only once per hour, making them unreliable for high-priority updates. **Service Level Agreements (SLAs) in Zendesk Support** * SLAs are contracts between you and your customer where you promise to respond to and resolve tickets within a certain time frame. * Zendesk helps create SLA policies and targets to provide consistent service and avoid SLA breaches. * SLAs enable agents to see the time remaining before each ticket is overdue, making it easy to prioritize. Standardized responses in Zendesk allow for efficiency by providing a pre-set answer to frequently asked questions. This saves time for agents who would otherwise need to craft individual responses. Before creating shared views for agents, several tasks must be completed: workflow planning, people management, branding, user access and security, product setup, and skills-based routing configuration. Additionally, triggers, automations, SLA policies, and shared views should also be set up. Macros are available on all Zendesk Support plans but require manual application by agents. They cannot be tailored to specific channels, though brand restrictions can be applied. Best practices for using macros include breaking complex tasks into smaller macros with fewer actions and incorporating placeholders for personalized customer responses. With the organizational structure in place, agents can now be added to the account, assigned roles, and granted access to specific channels. End users can also be added, either manually or automatically through support requests. The steps taken to configure user access security and authentication will apply to all users added to the Zendesk account. Basic framework setup should precede agent additions, which can be done individually, in bulk, or through the Zendesk API. Before adding agents, however, several prerequisites must be met: workflow planning, people management, branding, user access and security, product setup, and workflows configuration, as well as single sign-on setup. To set up agent subscriptions, start by adding each agent or administrator you want to include in your account. If you're bulk importing both users and organizations, make sure to import organizations first. On Support Enterprise, you define an agent's groups within their profile but don't specify permissions or ticket access there. Agent permissions are determined by the agent's custom role instead. This feature is available on all Zendesk Support plans. You can assign agents to specific groups, like the Legal group for a North American organization with English as their preferred language. Senior agents can have permission to view all tickets while junior agents only see tickets in their own group. For optimal efficiency, it's recommended to limit your administrators to around 1-5, ensuring there's redundancy. When managing a large support team, not every agent needs to be knowledgeable about each product aspect or fluent in multiple languages. Skills-based routing is the solution, where tickets are directed to agents best suited for the task based on their skills. First, create skill sets and then assign them to your agents. This way, tickets get routed efficiently. Before implementing skills-based routing, complete prerequisite tasks such as workflow planning, managing people, branding, user access and security, other products, and workflows. Also, configure single sign-on and add agents if you haven't already. Note that this feature is only available on Support Enterprise plans; users of other support plans can skip it. Skills can be categorized by language, location, or technical expertise. For instance, a website selling electronics might have agents skilled in TV support, cell phone support, or computer support. Best practices suggest assigning agents to skills thoughtfully and monitoring your skill coverage to avoid overloading any one agent. When setting up skills-based routing, ensure your agents are adequately trained on the necessary knowledge to effectively use Zendesk. Providing thorough training can significantly enhance service quality and give you a competitive edge in the market. Zendesk offers various training options including pre-recorded sessions, instructor-led courses, live classroom events, and custom training tailored to your needs. Before starting the training process, complete prerequisite tasks such as setting up workflow planning, managing people, branding, user access and security, other products, and workflows. To efficiently manage users and workflows, leverage the bulk import feature available on all Zendesk Support plans. Begin by configuring single sign-on, adding agents, and assigning them to relevant skills. Training is crucial; provide agents with a demo, access to the Agent Guide, or enroll them in eLearning courses. For optimal results, ensure agents have access to their own Zendesk account to practice what they've learned. Consider creating free Support trial accounts or sandbox accounts for corporate setup. Instead of manual user additions, utilize bulk import options like CSV files, API imports, or syncing with popular applications such as Salesforce. Before importing end users, complete tasks like workflow planning, branding, and security configuration. With Support Professional or Enterprise plans, multiple organizations can be added during bulk import. When assigning primary and secondary email addresses or phone numbers to a single user, utilize the external_id column. When creating lists for CSV file imports, consider exporting from existing user management systems like employee databases. External email address support is also available; configure email forwarding in your own account using specific instructions provided by your email provider. Setting up Zendesk Web Widget (Classic) for Seamless Customer Support