

# Macros, Triggers & Automations



zendesk

# Diferencias y Similitudes

	<i>Acción</i>	<i>Manual</i>	<i>Ejecución Inmediata</i>	<i>Cumple Condición</i>	<i>Tiempo</i>
<b>Macro</b>	✓	✓	✓		
<b>Disparador</b>	✓		✓	✓	
<b>Automatización</b>	✓			✓	✓



## Plantillas de respuesta para agentes

Son un poco más que solo plantillas de respuesta en texto, pueden cambiar propiedades de ticket como agregar un tag, cambiar el status del ticket o incluso asignar a otro agente.

## Condiciones y Acciones

Cada vez que un ticket es creado o actualizado, Zendesk revisa todos los triggers, sus condiciones y ejecuta acciones si las condiciones fueron válidas.

# Triggers

Trigger title

Meet **all** of the following conditions:

-- Click to select condition. --

Add condition

Meet **any** of the following conditions:

-- Click to select condition. --

Add condition

Perform these actions:

-- Click to select action. --

Add action

Create trigger



# Default Triggers

- Notify requester of received request
- Notify requester of comment update
- Notify assignee of comment update
- Notify assignee of assignment
- Notify assignee of reopened ticket
- Notify group of assignment
- Notify all agents of received request

## Notify requester of received request


**Trigger title**

Notify requester of received request

Meet **all** of the following conditions:

Ticket: Is...	Created	
Ticket: Status	Is not Solved	
Add condition		

**Perform these actions:**

Notifications: 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 add additional comments, reply to this email.

{{ticket.comments\_formatted}}

# Placeholders

- {{ticket.title}}
- {{ticket.id}}
- {{ticket.comments\_formatted}}

[View available placeholders »](#)



## Condiciones y Acciones

En las automatizaciones se incluye un factor extra a las condiciones, el tiempo. Estas condiciones son revisadas por Zendesk cada hora.

# Default Automations

- Close ticket 4 days after status is set to solved
- Request customer satisfaction rating

Close ticket 4 days after status is set to solved

Close ticket 4 days after  
status is set to solved

Automation title

Close ticket 4 days after status is set to solved

Meet **all** of the following conditions:

Status

Is

Solved

Hours since solved

Greater than

96

Add condition

Meet **any** of the following conditions:

-- Click to select condition. --

Add condition

Perform these actions:

Status

Closed

Add action



Requester replies + 3 hours no agent interaction -> unassign ticket

**Requester replies + 3  
hours no agent  
interaction -> unassign  
ticket**

**Automation title**

Requester replies + 3 hours no agent interaction -> unassign ticket

Meet **all** of the following conditions:

Ticket: Status ▼

Is ▼

Open ▼

Ticket: Assignee ▼

Is not ▼

- ▼

Ticket: Hours since open ▼

(business) Greater than ▼

3

Add condition

Perform these actions:

Ticket: Assignee ▼

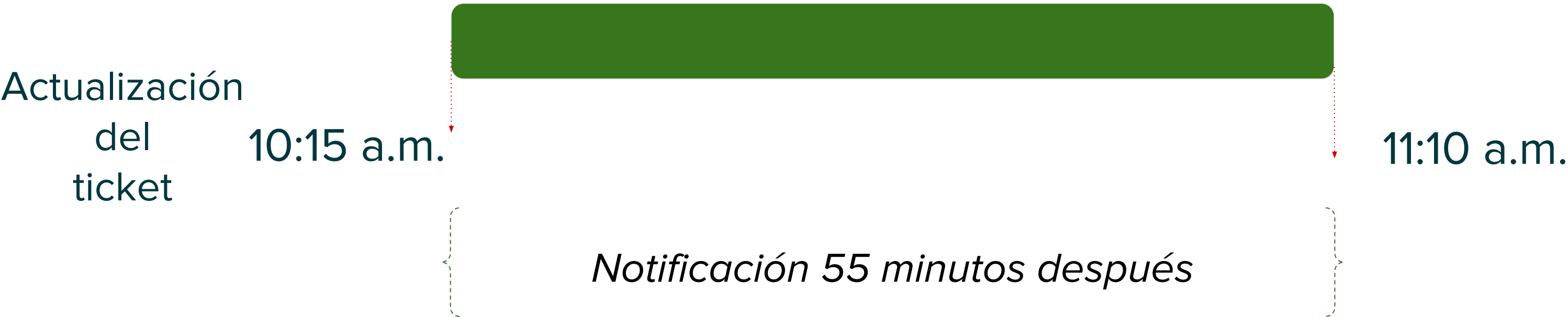
- ▼

Add action

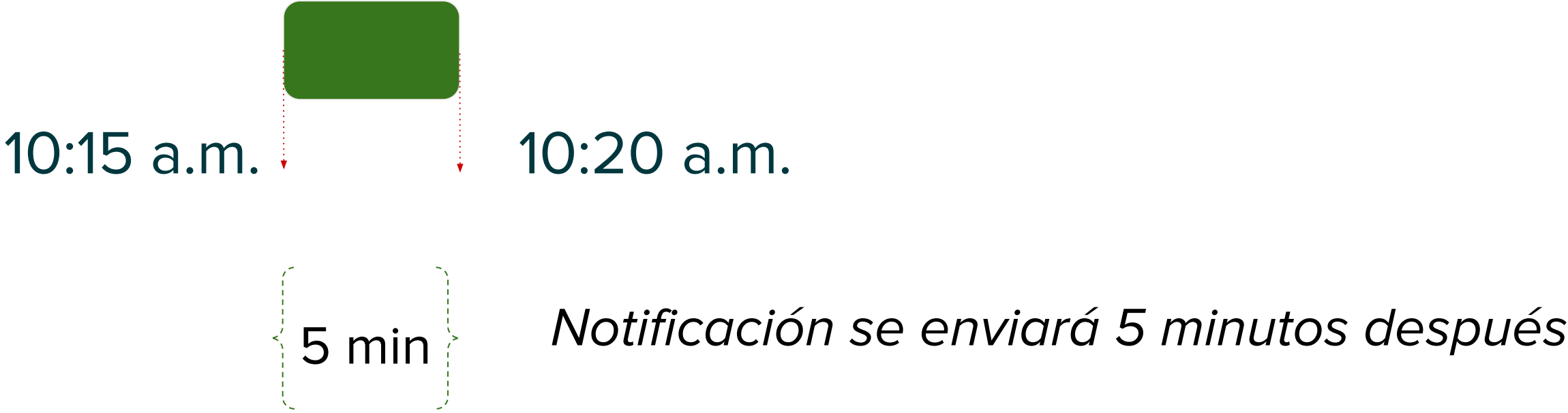
# ¿Cuándo se ejecutan?

## Ejemplo: La acción se producirá cuando se ejecute la automatización

- Si las automatizaciones se ejecutan a las **11:10 a.m.**



- Si las automatizaciones se ejecutan a las **10:20 a.m.**



# ¿Cuándo se ejecutan?

## Ejemplo: Realiza una acción dos horas después de que se resuelve el ticket

- Si las automatizaciones se ejecutan a las 10:10 a.m.



- Se vuelven a ejecutar a las 11:10 a.m.



- Se vuelve a ejecutar una hora después



# ¿Preguntas?



zendesk

# Introducción a desarrollo de Zendesk Apps



zendesk



# Zendesk Apps

## Apps Directory

### PRODUCT

☒ support

☐ chat

### CATEGORY

☐ Productivity & Time-Tracking 239

☐ IT & Project Management 131

☐ E-Commerce & CRM 114

☐ Telephony & SMS 105

☐ Analytics & Reporting 82

☐ Knowledge & Content 82

☐ Collaboration 73

☐ Surveys & Feedback 39

☐ Email & Social Media 36

☐ Zendesk Labs 36

☐ Channels 20

☐ Compose & Edit 14



Base CRM  
★★★★★ (6)  
FREE



Mixpanel  
★☆☆☆☆ (1)  
FREE



Lightning Macros  
\$5.00  
Per agent, per month



Tray.io  
FREE



Workato  
FREE



Recursive Labs Visual  
Engagement  
FREE



Geckoboard  
FREE



8x8 Virtual Office  
FREE



Out of Office  
★★★★★ (1974)  
FREE



Watchman Monitoring  
★★★★★ (44)  
FREE



Chuck Norris App  
★★★★★ (381)  
FREE



Trello  
★★★★★ (673)  
FREE

# Tipos de Zendesk Apps

The screenshot displays the Zendesk ticket interface for Ticket #340. The left sidebar contains a navigation bar labeled `nav_bar`. The main content area shows the ticket details, including the title `You sold me a dead parrot` and a public reply from Gerry5. A `ticket_editor` overlay is visible in the center. The right sidebar contains a `Customer Info` section with a search bar and a list of actions. At the bottom right, a `organization_sidebar` is visible. The interface also includes a `new_ticket_sidebar` and a `ticket_sidebar`.

nav\_bar

ticket\_sidebar

new\_ticket\_sidebar

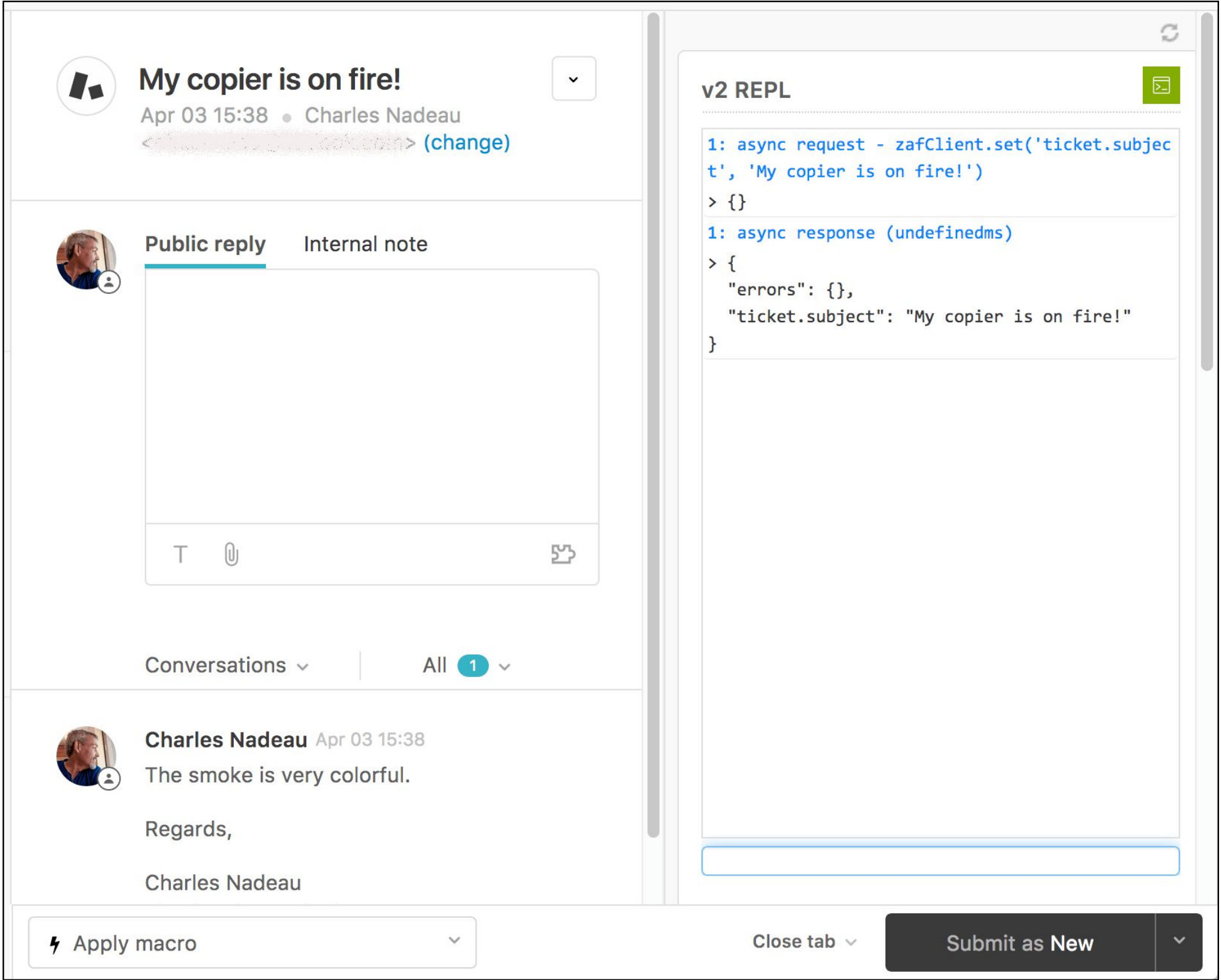
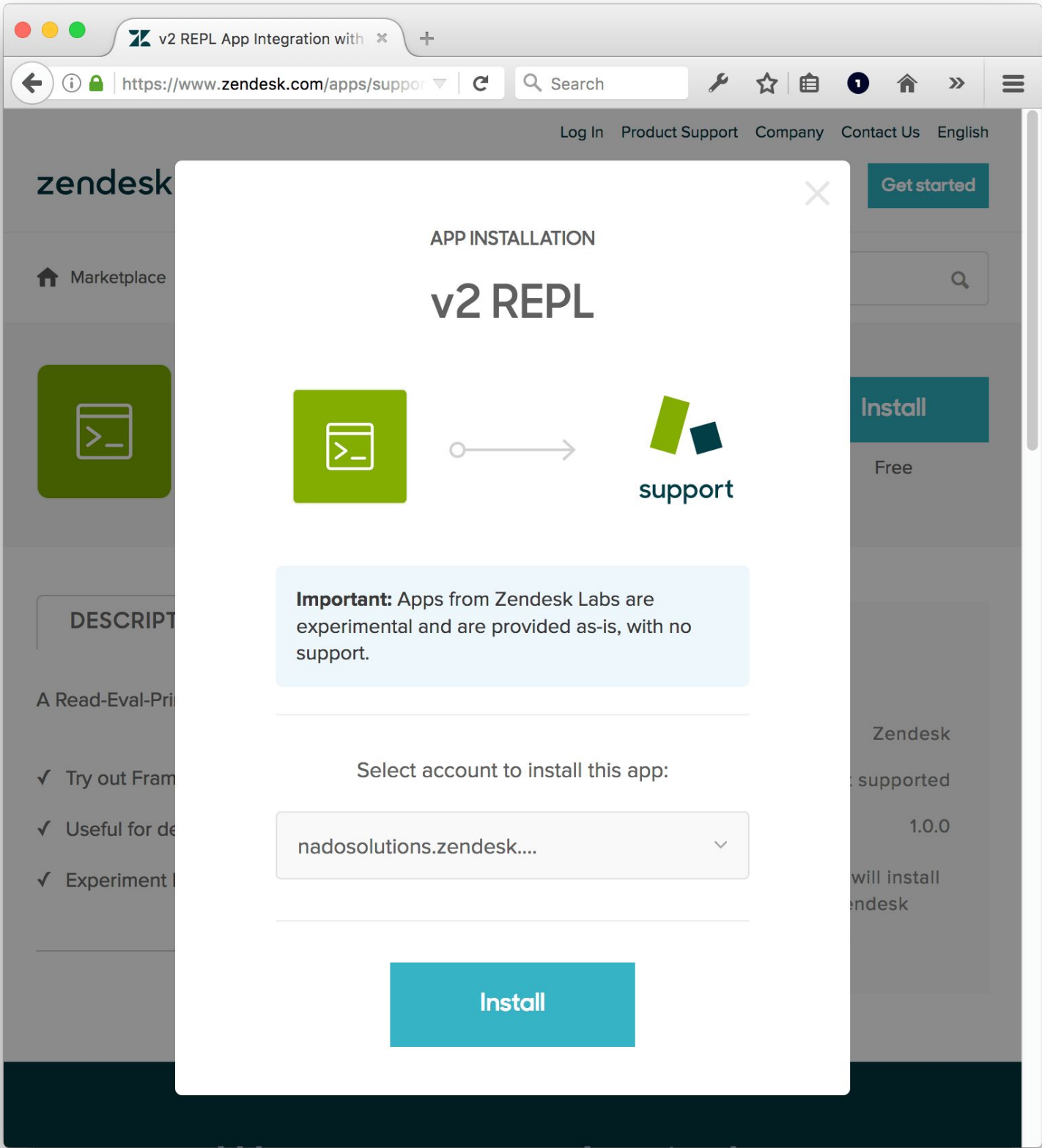
organization\_sidebar

ticket\_editor

# Tipos de Zendesk Apps

Location	Description
<code>ticket_sidebar</code>	Panel on the right side of the ticket
<code>new_ticket_sidebar</code>	Panel on the right side of the new ticket
<code>ticket_editor</code>	Toolbar on the lower side of the rich-text ticket editor
<code>user_sidebar</code>	Panel on the right side of the user page
<code>organization_sidebar</code>	Panel on the right side of the organization page
<code>nav_bar</code>	Navigation bar on the left side
<code>top_bar</code>	Right side of the bar on the upper side
<code>background</code>	No UI, always running in the background to receive special events
<code>modal</code>	Modal dialog





## Ruby 2.0 or better ZAT Ruby Gem

```
$ ruby -v
```

```
$ gem install zendesk_apps_tools
```

# Creando App

```
$ zat new
```

```
1. bash
Albertos-MacBook-Air:ticketinfo magiobus$ zat new
Enter this app author's name:
  magio
Enter this app author's email:
  magio@vernelabs.mx
Enter this app author's url:

Enter a name for this new app:
  ticketinfo
Enter your iFrame URI or leave it blank to use a default local template page:
  (assets/iframe.html)
Enter a directory name to save the new app (will create the dir if it does not exist):
  (./)
    exist
    create README.md
    create assets/iframe.html
    create assets/logo-small.png
    create assets/logo.png
    create assets/logo.svg
    create manifest.json
    create translations/en.json
Albertos-MacBook-Air:ticketinfo magiobus$
```



# Corriendo App en Desarrollo

```
$ zat server
```



A terminal window titled "1. ruby" showing the output of the command "zat server". The output indicates that Sinatra (v1.4.8) has taken the stage on port 4567 for development with backup from Thin. It also shows that the Thin web server (v1.7.2 codename Bachmanity) is running, with maximum connections set to 1024, and is listening on localhost:4567. The user can press CTRL+C to stop the server.

```
Albertos-MacBook-Air:ticketinfo magiobus$ zat server
== Sinatra (v1.4.8) has taken the stage on 4567 for development with backup from Thin
Thin web server (v1.7.2 codename Bachmanity)
Maximum connections set to 1024
Listening on localhost:4567, CTRL+C to stop
```

 Secure | <https://vernesdx.zendesk.com/agent/tickets/388?zat=true>

This page is trying to load scripts from unauthenticated sources.


[Load unsafe scripts](#)

[Manage](#)

OK


# Corriendo App en Desarrollo

open Ticket #388 Apps



**Connect and network**

Feb 16 08:50 • Ram Prasadh  
<ramprasadh@freshdesk.com> [\(change\)](#) • Via  
hola@vernelabs.mx


Reply in -279d ▼



Public reply Internal note

T  

Conversations ▼ | All 1

ticketinfo 

Hello, World!



## Obteniendo información del ticket y requester

```
client.get('ticket').then(function(response){
  var userId = response.ticket.requester.id
  requestUserInfo(client, userId).then(function(response){
    var userData = {
      "name": response.user.name,
      "email": response.user.email,
      "role": response.user.role,
      "time_zone": response.user.time_zone,
      "created_at": response.user.created_at
    }
    console.log("userData =>", userData)
  })
})
```

```
function requestUserInfo(client, id) {
  var settings = {
    url: '/api/v2/users/' + id + '.json',
    type: 'GET',
    dataType: 'json',
  };
  return client.request(settings)
}
```

# Handlebars


```
<script src="https://cdn.jsdelivr.net/handlebarsjs/4.0.8/handlebars.min.js"></script>
```

```
<div id="content"></div>

<script id="requester-template" type="text/x-handlebars-template">
  <table>
    <tr>
      <td>Nombre:</td>
      <td>{{name}}</td>
    </tr>
  </table>
</script>
```

```
var source = $("#requester-template").html();
var template = Handlebars.compile(source);
var html = template(userData);
$("#content").html(html);
```



**ticketinfo**

---

Nombre: Ram Prasadh  
Email: ramprasadh@freshdesk.com  
Role: end-user  
Time Zone: Mexico City  
Created At: 2017-02-16T14:50:35Z

<https://github.com/VerneLabs/ticketInfo>

# ¿Preguntas?



zendesk

# Gracias



zendesk