

# Zendesk Fundamentals

## Introduction

In this project, I used Zendesk to simulate ticket handling for a hypothetical IT department of an organization. I explored core features such as creating and merging tickets, applying tags, using macros, and navigating the Views tab. I also practiced internal communication by leaving notes and requesting approvals through SweetHawk. This hands-on experience provided a foundational understanding of Zendesk's key functionalities, enhancing my ability to manage support requests.

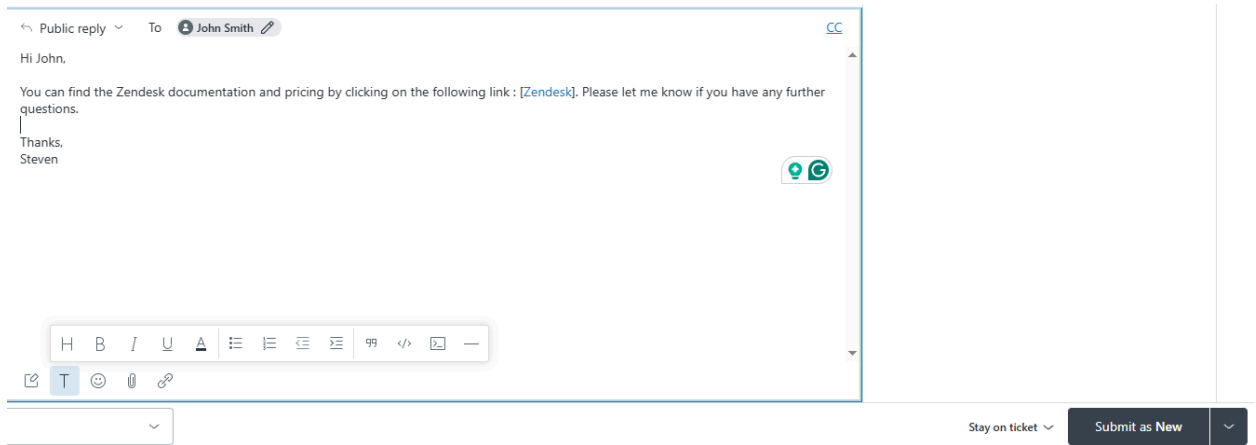
## Procedure

### Exercise 1: Creating a Sample Ticket

1. First, I created a sample ticket representing a hypothetical customer, assigned it to myself, and set the priority to **Normal**. I assigned the tag "FirstTicket" to optimize searching for it later.

The screenshot displays the Zendesk ticket creation interface. It includes a 'Requester' dropdown menu with 'John Smith' selected. An 'Assignee' dropdown menu shows 'Support/Steven Salinas Morill...' with a 'take it' link to its right. Below this is a 'Followers' section with an information icon and a 'follow' link. The 'Tags' section contains a text input field with the tag 'FirstTicket' and a close button. At the bottom, there are two dropdown menus: 'Type' with a hyphen '-' and 'Priority' with 'Normal' selected.

2. I then added a comment to answer the customer's request and submitted it as **Open**. Submitting a ticket as **Open** indicates that a ticket has been assigned to an agent and has not yet been resolved.



The screenshot shows a Zendesk ticket reply interface. At the top, it says "Public reply" with a dropdown arrow, followed by "To" and a user profile for "John Smith" with an edit icon. The main text area contains the following message: "Hi John, You can find the Zendesk documentation and pricing by clicking on the following link : [Zendesk]. Please let me know if you have any further questions. Thanks. Steven". To the right of the text is a "CC" link and a small icon of two people. Below the text area is a rich text editor toolbar with icons for bold (H), italic (B), underline (I), link (U), list (A), bulleted list, numbered list, decrease indent, increase indent, quote, code, and link. Below the toolbar is a text input field with a "T" icon. At the bottom right, there are two buttons: "Stay on ticket" with a dropdown arrow, and "Submit as New" with a dropdown arrow.

## Exercise 2: Merging, Updating, and Deleting Tickets

1. In this example, the initial task was to merge the ticket created during Exercise 1 with another ticket that addressed the same issue. The following illustrates the steps I followed to complete the merge.
2. First, I clicked on **Merge with another ticket** from the menu within the open ticket. Then, I selected the duplicate customer request from the list, as shown below.

## Ticket merge



You are about to merge ticket #10 into ticket #11

#10

April 13, 2025 John Smith

Issue with Locating Zendesk Documentation and Plan Pricing

This ticket will be closed with the following comment:

This request was closed and merged into request #11 "Issue with Zendesk Location".

☒ Requester and CCs can see this comment

#11

April 13, 2025 John Smith

Issue with Zendesk Location

This ticket will be updated with the following comment:

Request #10 "Issue with Locating Zendesk Docu..." was closed and merged into this request. Last comment in request #10:

☒ Requester and CCs can see this comment

Cancel

Confirm and Merge

- It's also possible to merge tickets from the **Views** tab by checking the boxes next to the tickets you wish to combine and then selecting the **Merge** option located at the bottom of the interface.

status category: Open

<input checked="" type="checkbox"/>	Open	Issue with Zendesk Location
<input checked="" type="checkbox"/>	Open	Issue with Broadband
<input type="checkbox"/>	Open	Issue with Software
<input type="checkbox"/>	Open	SAMPLE: How does Zendesk work
<input type="checkbox"/>	Open	SAMPLE TICKET: Do I put it together?
<input type="checkbox"/>	Open	SAMPLE TICKET: Shipping cost
<input type="checkbox"/>	Open	SAMPLE TICKET: New delivery address
<input type="checkbox"/>	Open	SAMPLE TICKET: Are products ethically sourced
<input type="checkbox"/>	Open	SAMPLE TICKET: Meet the ticket

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2 tickets [Edit](#) [Merge](#) [Mark as spam](#) [Delete](#)

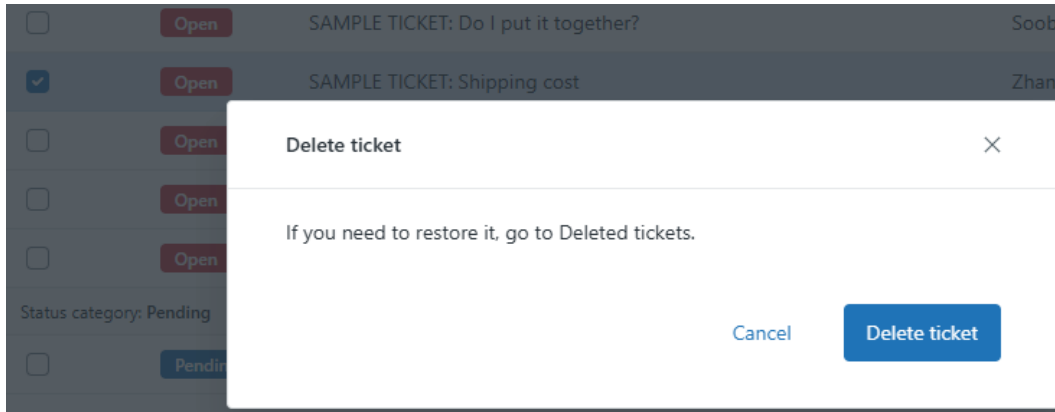
- After merging the tickets, I changed the ticket status to **Pending** using the keyboard shortcut **Ctrl + Alt + P**.

Issue with Zendesk Location

6 minutes ago

Status Pending

- Next, I deleted an open ticket to demonstrate what happens when one is accidentally deleted.



6. As seen in the previous screenshot, deleted tickets can be found in the **Deleted** tab. Below is the agent's point of view after selecting the **Deleted** tab. In this example, the only ticket in view was the deleted one from the previous step.

## Deleted tickets

1 ticket

☒ ID  Subject 

<input checked="" type="checkbox"/>	ID	Subject
<input checked="" type="checkbox"/>	#4	SAMPLE TICKET: Shipping cost

7. To restore a ticket, it must be selected by clicking the checkbox next to it and clicking the **Restore** option at the bottom of the interface.


1 ticket  Restore  Delete permanently

8. After restoring the ticket, it reappears in the **Views** tab with its status as it was before being deleted. The following screenshot illustrates this outcome.

## Your unsolved tickets



 Filter

9 tickets

<input type="checkbox"/>	Ticket status	Subject	Requester 
Status category: Open			
<input type="checkbox"/>	Open	Issue with Broadband	Sam Phone
<input type="checkbox"/>	Open	Issue with Software	Steve Ronald Salinas
<input type="checkbox"/>	Open	SAMPLE: How does Zendesk work	Customer
<input type="checkbox"/>	Open	SAMPLE TICKET: Do I put it together?	Soobin Do
<input type="checkbox"/>	Open	SAMPLE TICKET: Shipping cost	Zhang Wei Xu



## Exercise 3: Macros and Internal Communication

1. For this task, I encountered a customer request that required assistance from the Sales team. To ensure proper handling, I left an internal note indicating that I would reach out to the appropriate agent for additional guidance.



 Zhang Wei Xu  • Friday 12:17

Hello, I've got some cool items in my cart on your site, but before I take the plunge, I want to understand how much I'll be paying for shipping. The numbers can be a bit scary when you don't know what they're for.

Can you help me understand what all influences the shipping costs? Is there a calculator or formula I can use first?

 Steven Salinas Morillon  • Yesterday 21:41

I need to check with Bob from sales.

 Steven Salinas Morillon  • 1 minute ago

Hi @Bob. This is the issue with Zhang Wei Xu that we talked about. Can you have a look and advise me on how to proceed? Thanks.

2. Next, I created a macro template for common requests regarding training materials. The screenshot below shows the macro name and description, which communicate its purpose to other agents. Please note that macros can only be created with appropriate permissions (except personal macros).

Macro name\*

Training Materials Location

Description

To be used for customers with questions regarding the localization of training materials.

Available for

All agents

3. In the actions field, I added an appropriate **comment/description** field using placeholders to ensure reusability.

Actions

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

Comment/description

Paragraph

Hello {{ticket.requester.first\_name}},

Please find the needed training materials by following this link: [Zendesk](#).

Let me know if there's anything more I can do to help.

Thanks,

{{current\_user.first\_name}}

Attach files

4. The following screenshot illustrates the use of the newly created macro. Agents can apply a macro by selecting it from the **Apply macro** menu in the lower-left corner of the ticket interface. The red arrow highlights the exact location of this option.

Requester

Customer

Assignee\*

Support/Steven Salinas Morillon

Followers

Tags

zendesk\_accelerated\_setup

Type

Priority

Normal

Topic

SAMPLE: How does Zendesk work

Via sample ticket

Customer

Friday 12:17

Hello, let's see how you or your agents can easily respond to and solve tickets.

Feel free to email additional customer test inquiries to [support@self-employed8634.zendesk.com](mailto:support@self-employed8634.zendesk.com).

But first, let's start by solving one ticket.

Your Zendesk Team

Public reply

Customer, Steven Salinas Morillon

Hello Customer,

Please find the needed training materials by following this link: [Zendesk](#).

Let me know if there's anything more I can do to help.

Thanks,  
Steven

Apply macro

Submit as Open

5. For quick access, tickets can be found using their tags. For example, searching **zendesk\_accelerated\_setup** returns the ticket from the previous step:

Tickets (1)

Articles (0)

Users (0)

Organizations (0)

Side conversations (0)

	Ticket status	ID	Subject
<input type="checkbox"/>	Open	#6	SAMPLE: How does Zendesk work



## Exercise 4: Zendesk for IT

1. The following screenshot represents a common layout of the **Views** tab used by an IT department in a company, showcasing how tickets can be categorized for efficiency.



The screenshot shows the 'Views' tab in Zendesk. At the top, there is a header 'Views' with a refresh icon and a back arrow. Below this is a list of ticket categories, each with a count. The 'Software Issues/Access' category is highlighted with a blue background. At the bottom, there is a link to 'Manage views' with an external link icon.

Views	
My Requests	2
Urgent and High Priority	8
Software Issues/Access	292
Hardware Issues	52
New Hires/Onboarding	62
Calls and SMS	38
New Hardware	125
Recent Chats	77
Facilities	91
Human Resources	16
All Tickets (excluding Solved & C...	1.1K
Pending Approval	4
Suspended tickets	0
Deleted tickets	4
Manage views	

2. In this task, a customer submitted a time-sensitive request for access to Adobe Premiere Pro, explaining that it was required to complete a project by the end of the week.




Alexa LeBlanc

Today 02:41 pm

Assign

Can you help me get access to Adobe Premiere Pro? I need it ASAP for a project due at the end of the week. Thank you!


- Before proceeding, I needed to confirm that the customer's device could support Adobe Premiere Pro. Using **AssetSonar**, I verified that the system met the required specifications for installation.

 AssetSonar

ITEMS FOR ALEXA LEBLANC

^ Checked Out Items


2



A ID\_12345

129 - HP 32 GB ☒

CHECKED OUT

 Actions ▼

Asset #:


129

AIN:

ID\_12345

Location:


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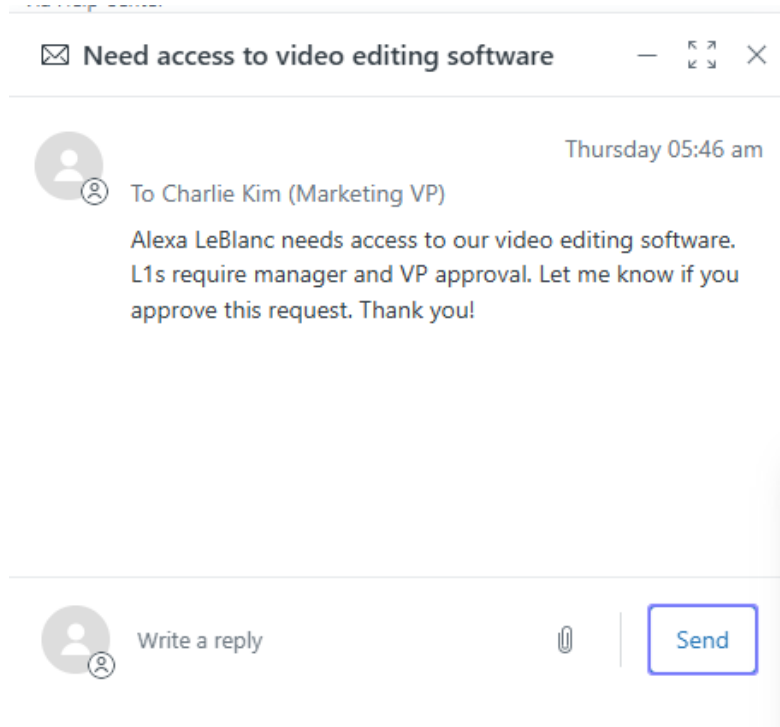
A GVFXH1YDHV2HPLK

24 - Dell 24" Monitor ☒

CHECKED OUT

 Actions ▼

4. Since providing this software required managerial approval, I used **SweetHawk** to submit an approval request to the VP of Marketing. This ensured that the necessary authorization was obtained before proceeding with the installation.



5. Once approval was granted, the request was fulfilled successfully, and the customer was given access to Adobe Premiere Pro.

## Conclusion

In this simulation, I navigated various Zendesk workflows to manage customer support scenarios, gaining a general understanding of how the platform functions in real-world contexts. I engaged with key features such as ticket merging, internal notes, macros, views, and tagging to streamline communication. I also utilized tools like AssetSonar to verify system compatibility and SweetHawk to initiate approval processes. Additionally, I demonstrated how to organize and retrieve tickets using the tags and search functionality. This hands-on experience provided a solid foundation in Zendesk's core features, successfully fulfilling the intended outcome of developing a general understanding of the platform.