# Zammad (for Agents)

May 20, 2021

# Basics

CHAPTER 1

# What is a Ticket?

In Zammad, **tickets** are used to track customer service requests. The first time a customer emails you (or the company) about something, Zammad creates a new ticket. Each message sent between you and the customer is added to that ticket until the issue is resolved, the customer is happy, and the ticket is finally **closed**.

So in a basic sense, a ticket is **a thread of messages between you and a customer about a single issue**.

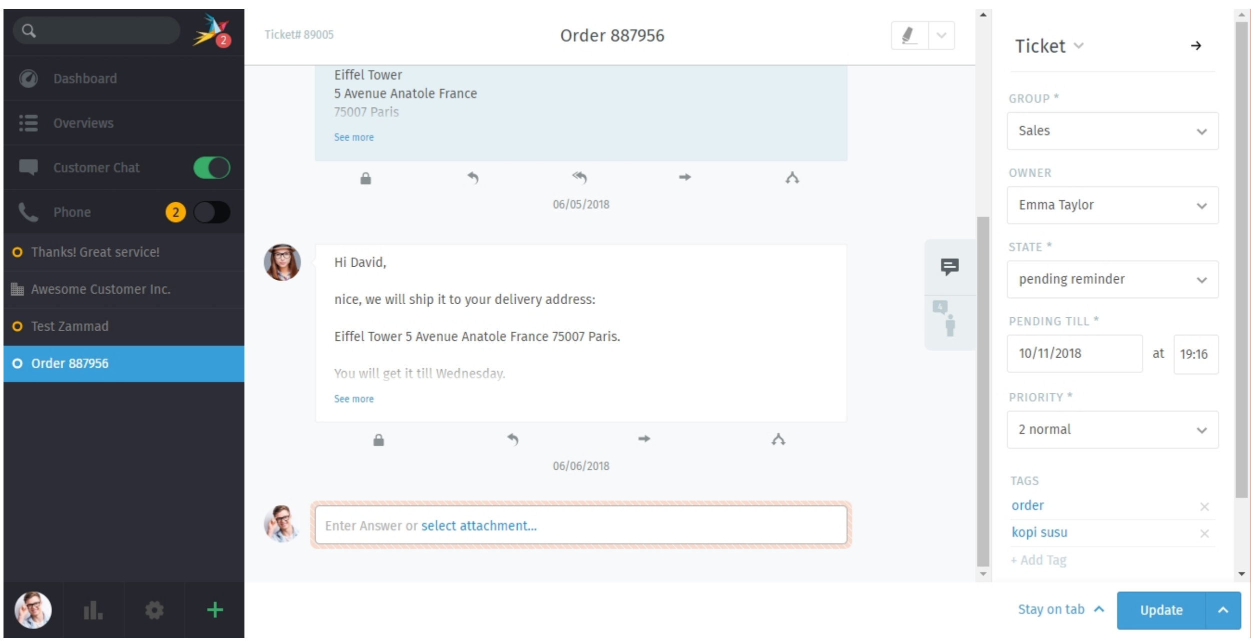



Fig. 1: A ticket is a thread of messages between a customer and an agent.

**Hint:** You know you're doing a great job when you 1) respond to tickets quickly and 2) get them closed in a timely manner.

*Keep an eye on your dashboard* to see how well you're keeping up.

## 1.1 Ticket Settings

Tickets also have metadata attached to them to make them easier to manage. For instance, tickets have a customer and (optionally) an agent; they can be open or closed (or even be scheduled for later); they can be organized into groups; and they can even be flagged for high or low priority.

For the sake of simplicity, we'll refer to this metadata as the **settings** of a ticket. All of these settings can be changed at any time. Each setting is explained in detail *here*, but for the time being, let's go over the two most important ones:

**Owner *(optional)*** The **agent currently assigned to** (*i.e.,* responsible for) the ticket.

**State** Is the customer still waiting on an answer (**open**), or has the ticket been resolved (**closed**)?

**Note: See Also**

For an in-depth discussion of each ticket setting, see the articles below:

- *Owner*
- *State*
- *Group*
- *Priority*
- *Tags*

CHAPTER 2

# Finding Tickets

If you plan to work on tickets, you'd better know how to find 'em first.

Read on to learn how to check for new tickets, and dig up old ones.

## 2.1 Browse for Tickets

Looking for a ticket to work on? Check the **overviews** menu.

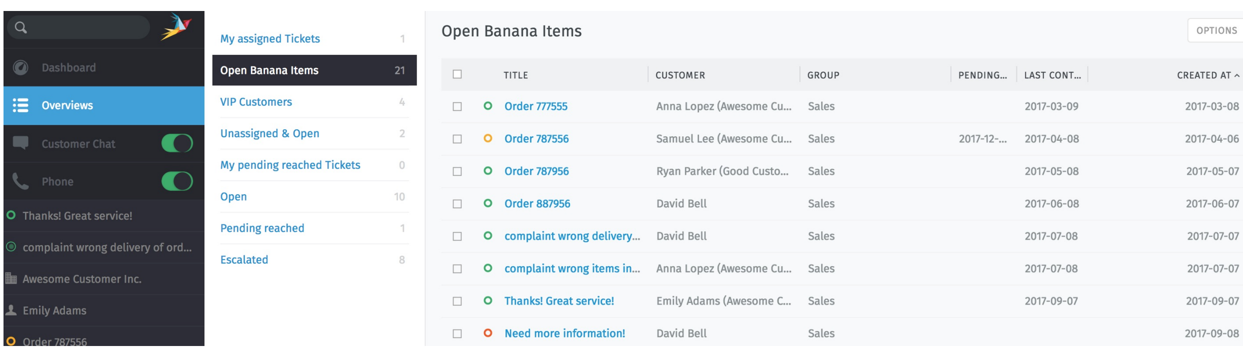



Fig. 1: Click **Overviews** in the main menu to browse tickets.

**Hint:** Think of overviews as **inboxes**, each with a different filter for the tickets it displays.

There are **six built-in overviews** (Zammad admin may create more with custom-defined filters):

- **My assigned tickets** (*open/pending* only)
- **Unassigned & Open**
- **My pending reached tickets** (previously marked *pending* and currently due)

- **Open** (system-wide)
- **Pending reached** (system-wide, previously marked *pending* and currently due)
- **Escalated** (system-wide, failing to meet a service-level agreement)

**Tip: UI Protip**

- Click on column headings to change the display order.
- Click-and-drag column dividers to adjust their width.
- *Ticket states* are **color-coded:**

| | |
|---|---|
| | **Closed** |
| | **Postponed** (Marked as pending; no immediate action required.) |
| | **New / Open** (Ready for action.) |
| | **Escalated** (Requires urgent attention.) |

## 2.2 Search for Tickets

Looking for an archived ticket? Use the **search bar**.

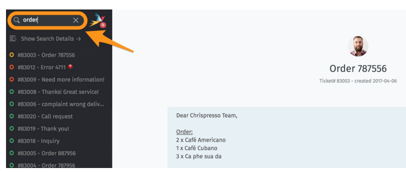



Fig. 2: Results appear immediately under the search bar as you type.

**Hint:** It's not just for tickets! Results cover **chat logs**, **customers**, and **organizations**, too.

**Here are just a few of the places the search engine will look:**

- message subject/content
- recipient names & email addresses
- text in file attachments (really!)
- user/organization metadata (*e.g.,* notes stored on customer profiles)

You can find a detailed search document in our Advanced Search page.

**Tip: UI Protip**

Click on column headings to change the display order.

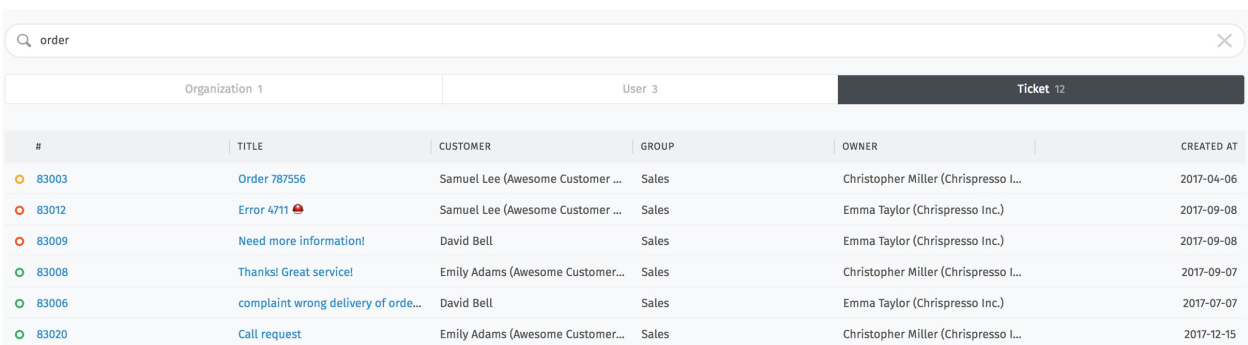



Fig. 3: For detailed results, click the **Show Search Details** → link just above the autocomplete list.

CHAPTER 3

# Servicing Tickets

This is where you'll spend the vast majority of your time in Zammad.

Once you get the hang of the tasks below, there's really not much more to it.

## 3.1 Creating a Ticket

Zammad does its best to create tickets automatically when new customer issues come your way. But sometimes, there's just no way for Zammad to know when an issue arrives – like when a customer calls on the phone.

In these cases, Zammad needs your help to **create a new ticket**.

An agent can create three types of tickets:

**Received Call** for issues **initiated by a customer** over the phone.

**Outbound Call** for issues **initiated by an agent** over the phone.

**Send Email** for issues **initiated by an agent** over email.

### 3.1.1 Filling Out the Form

Here's a quick run-down of each input field in the New Ticket form:

**Title** The title of the ticket will be used as the **subject line** for all email correspondences.

**Customer** When entering a customer, the autocomplete menu searches for **email addresses only**. You **must** select an option from the autocomplete menu, or else create a new customer.

You may **not** assign a ticket to more than one customer.

**Tip: UI Protip**

Once a customer has been selected, her profile will be accessible from the **ticket pane**.

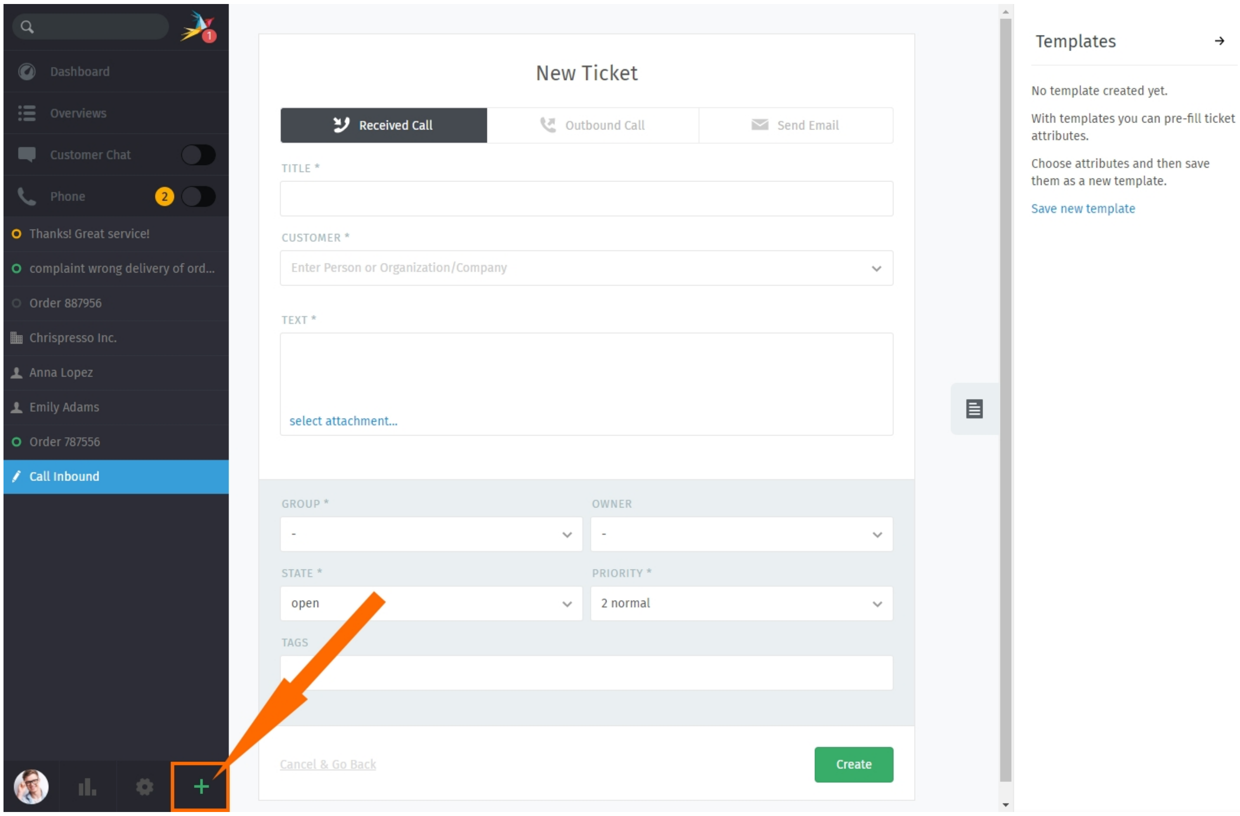
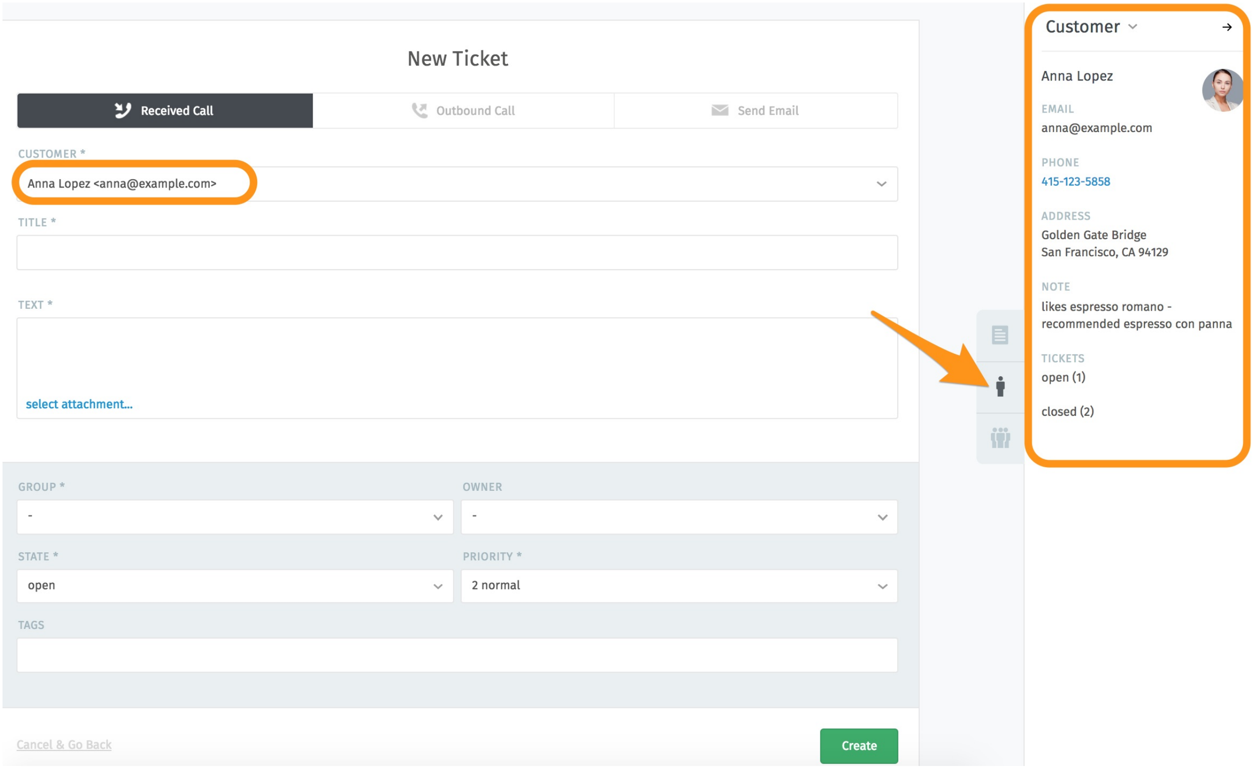



Fig. 1: Click the **button** to create a new ticket. The default ticket type is **received call**.

Fig. 2: Autocomplete can't find customers by name.




**Text** For phone calls, record the details of your conversation. These notes will not be sent to the customer (though he may be able to see them if he has a Zammad account).

For emails, this is the body of your outgoing message.

**Tip: UI Protip**

- The message editor supports copying-and-pasting (or dragging-and-dropping) of **rich text**, **images** and **file attachments**.
- Use the built-in *keyboard shortcuts* to apply rich text formatting.

### Ticket Settings

**Note: See Also**

For an in-depth discussion of each ticket setting, see the articles below:

- *Owner*
- *State*
- *Group*
- *Priority*
- *Tags*

## 3.2 Following Up

Generally, "working on existing tickets" means keeping up with a customer correspondence in the **thread view**. You can do this by:

- responding to an **individual message**, or
- adding a message/note to the **whole ticket**.

Read on to learn more, or skip ahead to find out about *managing ticket settings* (which is the other half of "working on existing tickets").

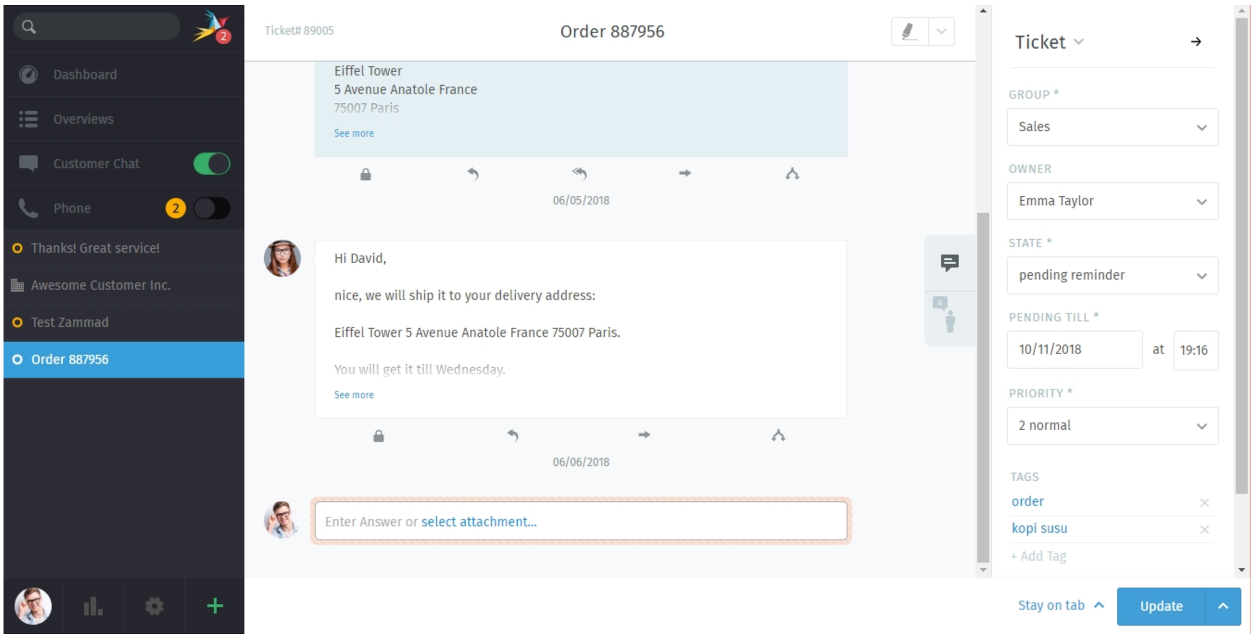


Fig. 3: Tickets are threads of messages & notes about a customer service issue. *Manage a ticket's settings* in the **ticket pane** on the right.

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**Hint:** Any time you open a ticket, a new entry will appear in your *tab list* in the main menu.

Zammad **automatically backs up your unsaved changes** in all open tabs.

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### 3.2.1 Responding to Individual Messages

Use the **reply** button under a message to reply to it directly.

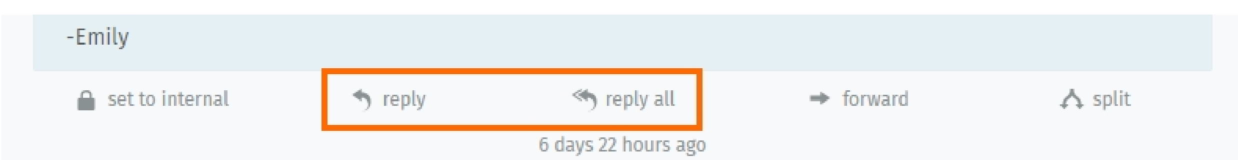


Fig. 4: An additional **reply all** option will appear for email messages with multiple recipients.

Like with new messages, your response will appear at the end of the thread. Under the hood, responses are sent **via the same channel as the original message** (*i.e.,* if the message you replied to was originally a tweet, the customer will receive your response in a Twitter DM).

**Hint:** You can also **forward messages**, just as you would in any email client (attachments are included automatically).

This way, you can share correspondences with people who don't have Zammad (like a third-party supplier).

**Tip: UI Protip**

Click on a message to see detailed information about it.

### 3.2.2 Adding New Messages/Notes

Click on the text field at the end of the thread to add a follow-up.

Fig. 5: The default follow-up type is "note". Click the  to select another type.

There are three types of follow-ups:

**Note** Jot down a reminder for yourself and other agents when new information comes in (hidden from the customer by default).

**Call** Record a summary of a phone call you had with the customer.

**Email** Send an email *to anyone* about the ticket. The name of the ticket will be used for the subject line (*click on the title to rename it*).

**Hint:** Click the  button to change the visibility of a note or message.

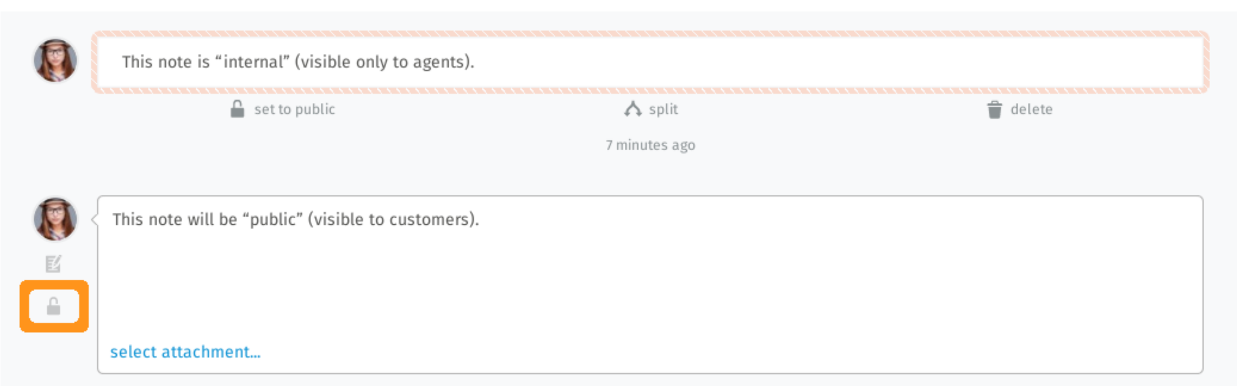


Fig. 6: "Internal" messages are outlined with a salmon border, and **can only be viewed by other agents**.

**Tip: UI Protip**

- The message editor supports copying-and-pasting (or dragging-and-dropping) of **rich text**, **images** and **file attachments**.
- Use the built-in *keyboard shortcuts* to apply rich text formatting.

**Caution: I'm working here!**

Every once in a while, two agents may have the same ticket open at the same time. When this happens, things can get messy fast: customers may receive conflicting responses on the same issue from both agents; or, changes made by one agent may be accidentally undone by the other.

To keep things under control, Zammad will alert you to potential conflicts by displaying an avatar in the lower-lefthand corner for every agent that has that ticket open.

Be sure to communicate with your colleagues to prevent these problems before they arise.

## 3.3 Ticket Settings

Use the **ticket pane** to manage a ticket's settings:

### 3.3.1 Group

**Groups** are a form of access control that allows you to dictate *which agents are allowed to do what* to a given ticket.

#### What?

Suppose your organization uses Zammad for both sales and customer support. You've got ten different agents spread across two teams, handling dozens of tickets a day.

Without groups, all ten agents can see (and respond to) every single ticket that comes in, regardless of which department it's for. This isn't problematic *per se,* but it does lead to a lot of unnecessary clutter in the *overviews menu*. (It can be much worse when, for example, a customer service rep sees tickets meant for your HR department, and finds out how much their colleagues in sales are making! )

If, instead, each agent were assigned to an appropriate group, then they'd only ever see the tickets that belong to their own group.

**Note: So how do I manage which team I'm on?**

You don't – that's the administrator's job.

However, you can *check* which teams you're on in the Notifications section of your *user settings*:

#### So where do I come in?

If you belong to more than one group, you may re-assign a ticket from one of your groups to another. In general, though, you won't need to do this unless you're an admin, or an admin has discussed the procedure with you beforehand.

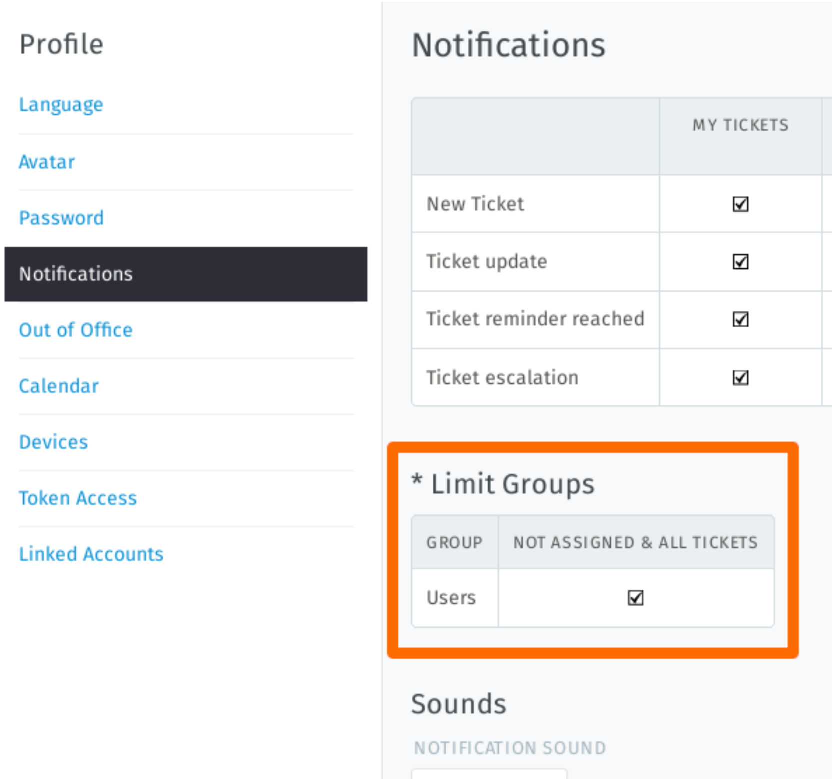


Fig. 8: This user belongs to only one group ("Users").

### 3.3.2 Owner

A ticket's **owner** is simply *the agent that is currently responsible for it*.

#### Whose job is it to assign tickets?

It depends on your organization's workflow, but in most cases, **you will assign tickets to yourself** when you choose an issue to work on from the pool of new tickets.

In principle, any agent may assign a ticket to any other, as long as both have the required privileges for the ticket's *group*.

#### Why would I want to re-assign a ticket to someone else?

Sometimes, complicated issues will require a ticket to be *passed back and forth between multiple agents* before it can be closed. In such cases, a colleague may assign a ticket to you (or vice versa) after it has been partially resolved.

### 3.3.3 State

The **state** of a ticket refers to *its progress toward completion,* and may be one of the following:

- new
- open

- closed
- pending close (*i.e.,* scheduled to automatically close at a later date)
- pending reminder (*i.e.,* hidden, but scheduled to reappear at a later date)

#### What's the difference between "new" and "open"?

States do more than just indicate progress: Zammad has a fine-grained time tracking feature (so-called "service-level agreements", or SLAs) that uses state information to measure how long it takes for customers to get a response on a new ticket or get their issues resolved entirely.

On a *new* ticket, the customer still hasn't received her first response on the issue.

On an *open* ticket, the customer has received an initial response, but the issue still hasn't been resolved.

**Note:** Tickets in a *pending* state do not accumulate time toward their SLA limits.

So, for instance, a ticket may be marked *pending reminder* if it's waiting on feedback from a third-party supplier who's out of town until next week.

### 3.3.4 Priority

A ticket's **priority** is simply a ranking (from 1 to 3) of *how urgent or important it is*.

#### But what does it do, and how should I use it?

Out of the box, **ticket priority doesn't actually do anything**. However, Zammad administrators can set up all sorts of automated hooks that fire off based on this value, like:

- service-level agreements,
- triggers, and
- scheduled events.

Priority can also be used as a ticket filter when creating custom overviews.

In other words, **consult your administrator** for details on how he'd like you to use it.

### 3.3.5 Tags

**Tags** are custom-defined labels that can be applied to tickets to make it easier to find them in the future.

**Hint:** *Search for tickets with a given tag* with the `tags:` search filter. For instance, find all tickets with the **order** tag by searching for `tags: order`.

**Note:** Some options may not be available if you do not have the required privileges.

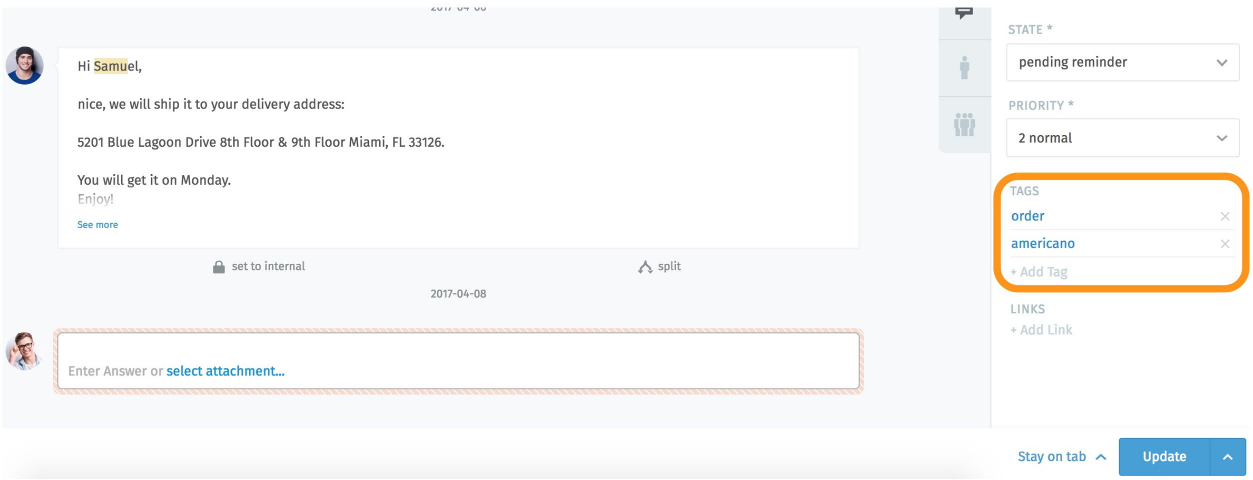


Fig. 9: Click on a tag name to view other tickets with the same tag.

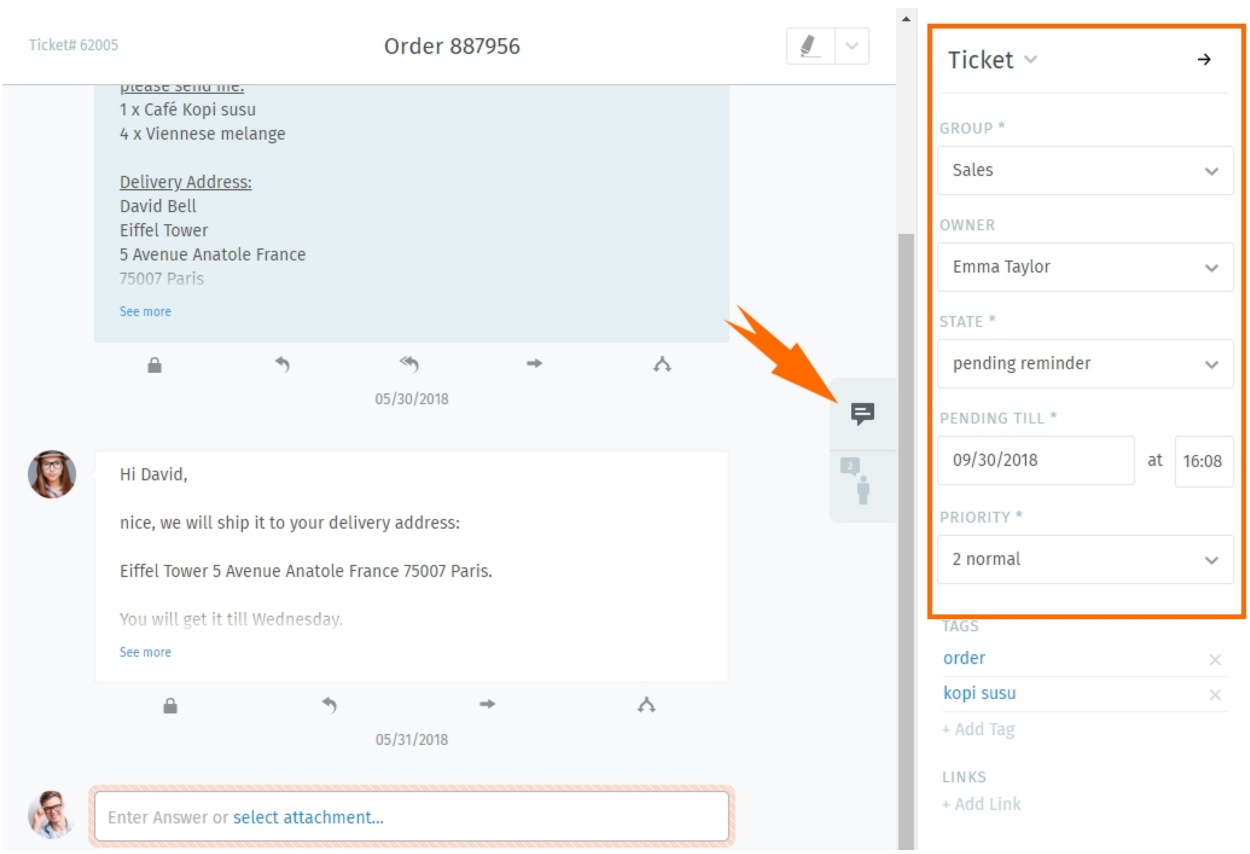


Fig. 10: Click the → button in the corner to hide the ticket pane. Click the  tab to bring it back.

### 3.3.6 Renaming a Ticket

To rename a ticket, simply click on the title and start typing.

### 3.3.7 Highlighting Ticket Text

Use the highlighter tool in the upper-righthand corner to mark up important text. (Your highlights are **not** visible to other agents.)

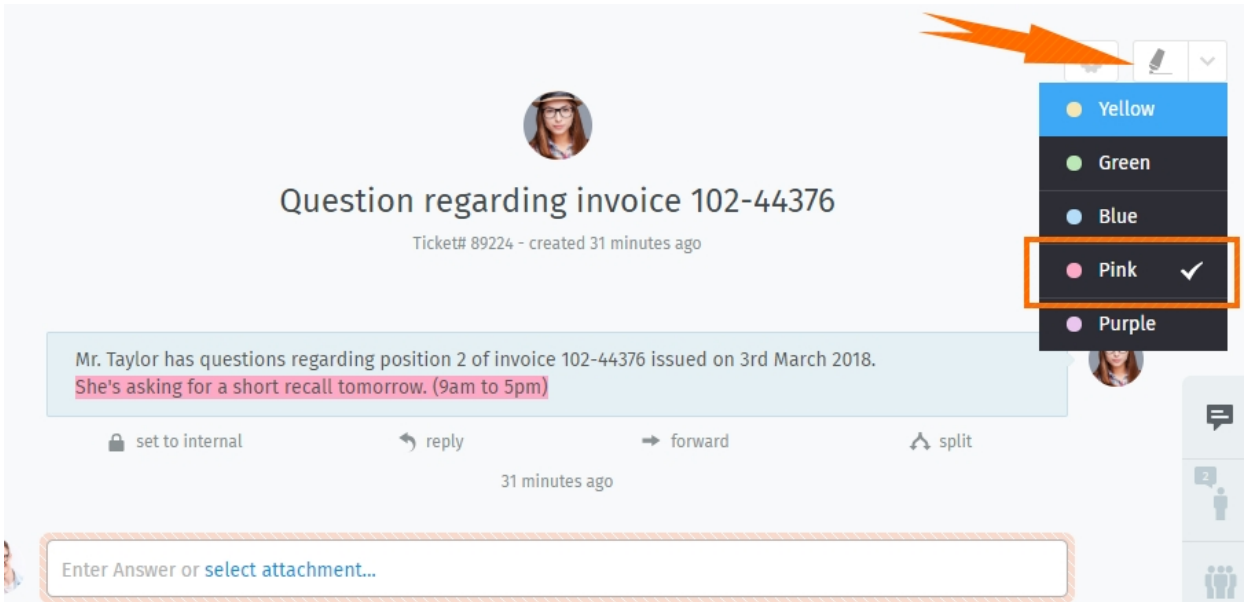


Fig. 11: Highlight by selecting text, then clicking the highlighter. Click again to undo.

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**Tip: UI Protip**

Additional actions are available via the **submenu**:

**History** See a comprehensive list of updates to the ticket, performed by any user, since its creation.

**Merge** Migrate all messages/notes to another ticket (see *Merging Tickets* for details).

**Change Customer** Reassign the ticket to another customer.

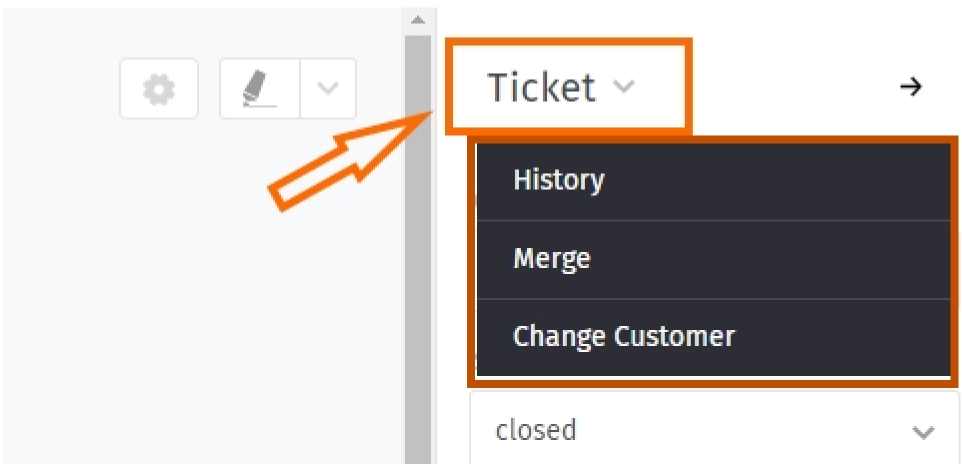



Fig. 12: Click the **Ticket** heading to access additional actions.

# CHAPTER 4

# Ticket Actions

Unlike ticket settings (which are *attributes that can be modified*), **actions** are *operations that can be performed* on a ticket, usually to facilitate the overall ticket management process.

## 4.1 Merging Tickets

Sometimes, you may end up with two tickets for the same issue (*e.g.,* because a customer sent you a brand new email instead of replying to an existing thread).

In such cases, you may want to **merge those tickets into one**.

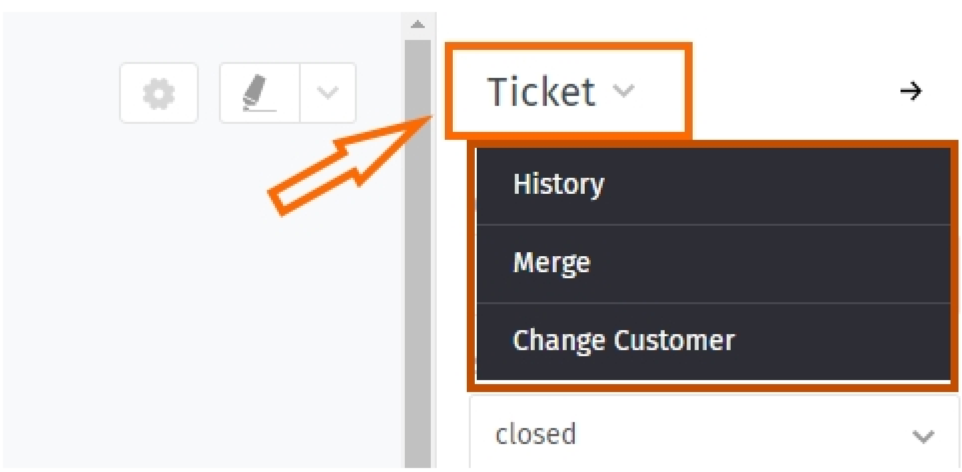



Fig. 1: To merge a ticket, access the **Ticket** submenu in the ticket pane.

**Note:** Merging a ticket migrates all messages and notes **out of the original** and into the selected one.

That is, if you 1) access the merge dialog from Ticket A, and then 2) select Ticket B in the merge dialog (see below), then Ticket A will be emptied, closed, and *linked as a child* of Ticket B.

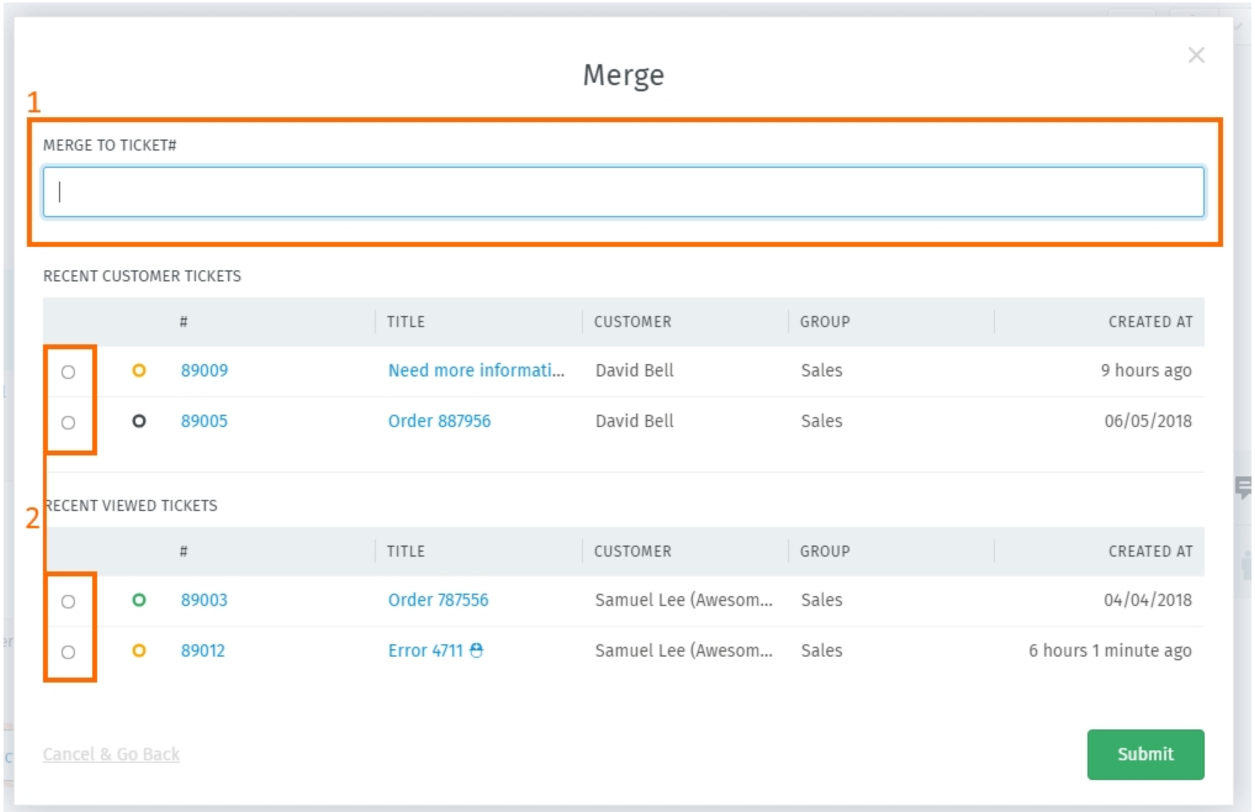



Fig. 2: The merge dialog. Specify a ticket to merge into by ID (1), or select one from the list (2).

## 4.2 Splitting Tickets

Some tickets may actually encompass more than one issue, or require attention separately from two different departments (*e.g.,* sales and customer service).

In such cases, you can **split off a single message into its own ticket**. (Alternately, it may make more sense to *simply take turns on a single ticket* instead.)

## 4.3 Linking Tickets

When tickets about related issues arise (*e.g.,* multiple customer complaints about the same botched shipment), they can be **linked to each other** for easier reference.

**Tip:** Linked tickets may optionally be organized into a parent-child hierarchy.

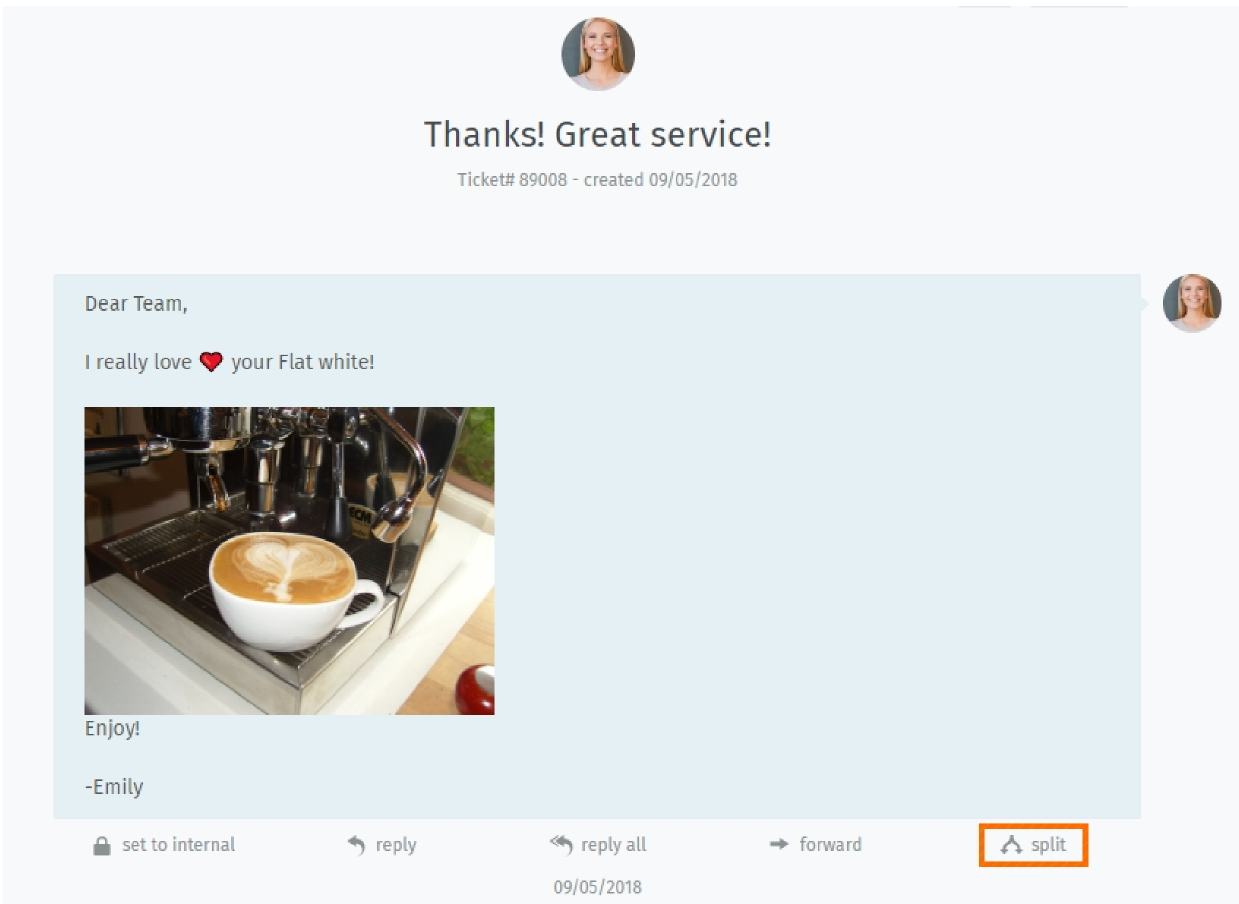



Fig. 3: Click the "split" button to take a message and use it as the starting point for a new ticket.

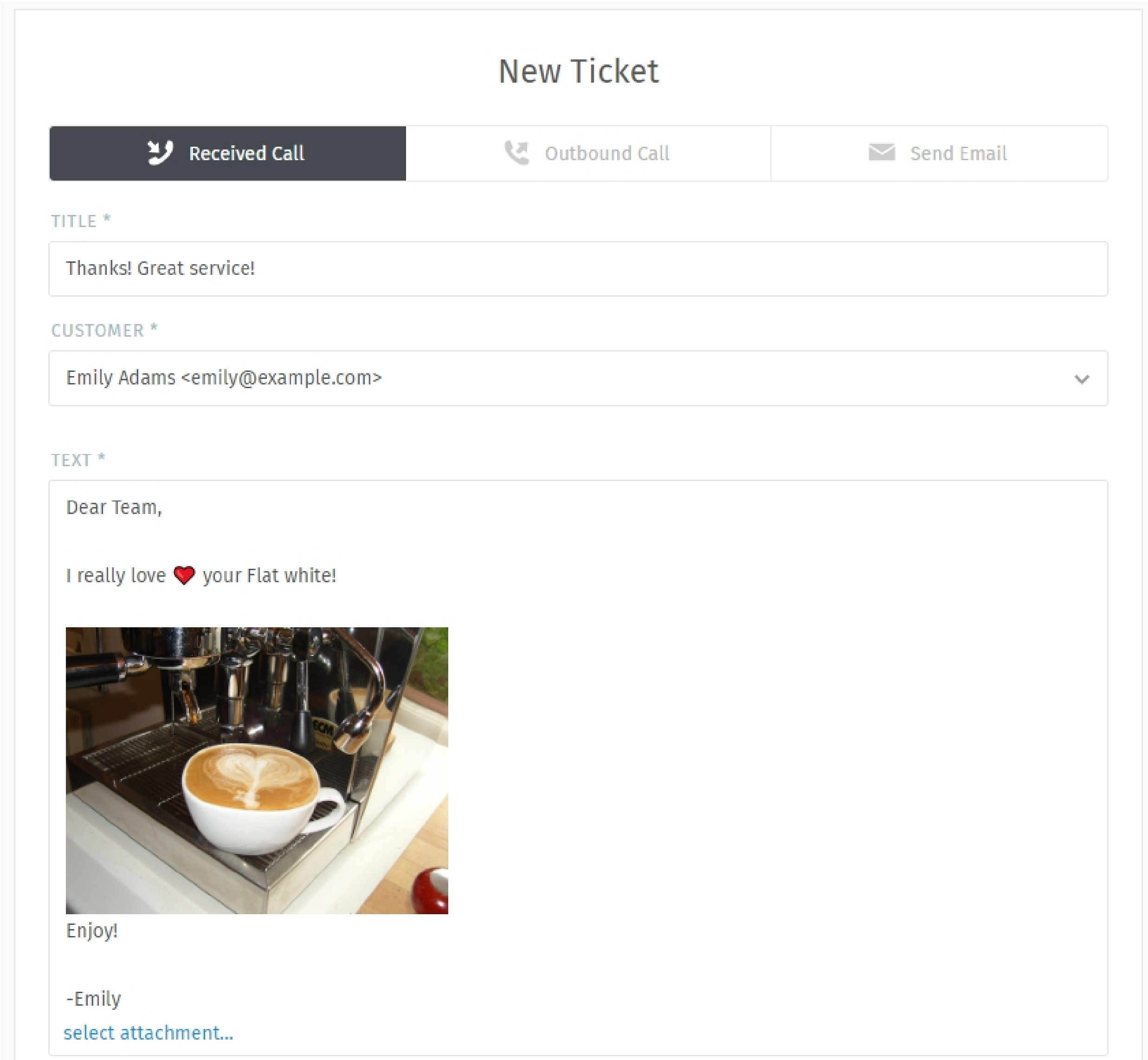



Fig. 4: When splitting a ticket, the target message is imported into the new ticket dialog. As usual, remember to select the **type** (call/email).

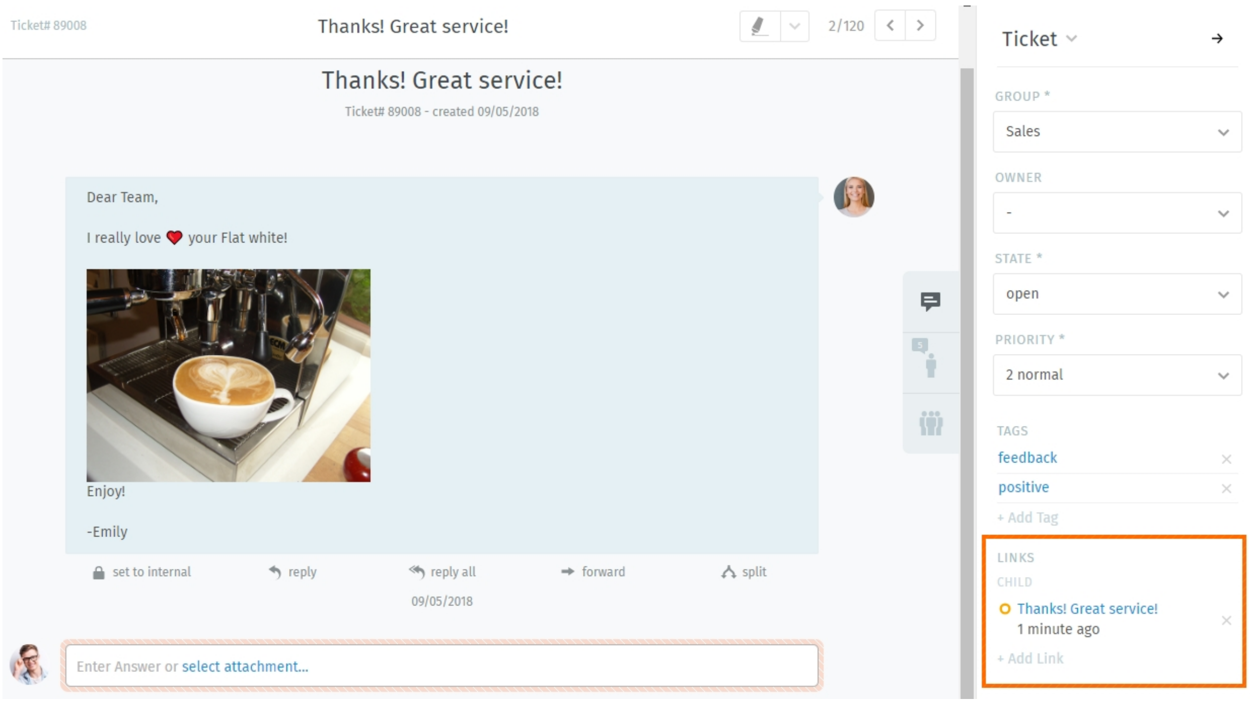



Fig. 5: The original ticket is *linked* to the new one, as seen in the ticket pane.

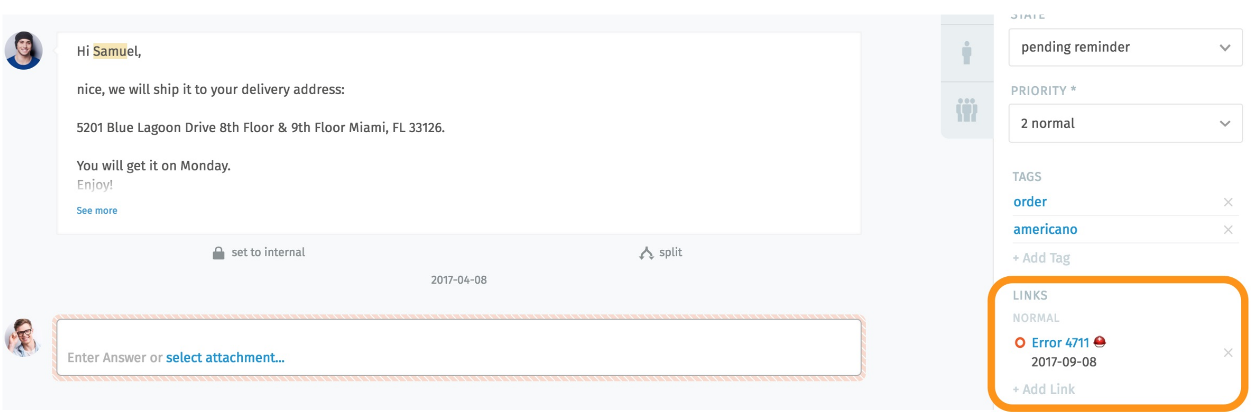



Fig. 6: Click the *Add Link* button to access the link dialog.

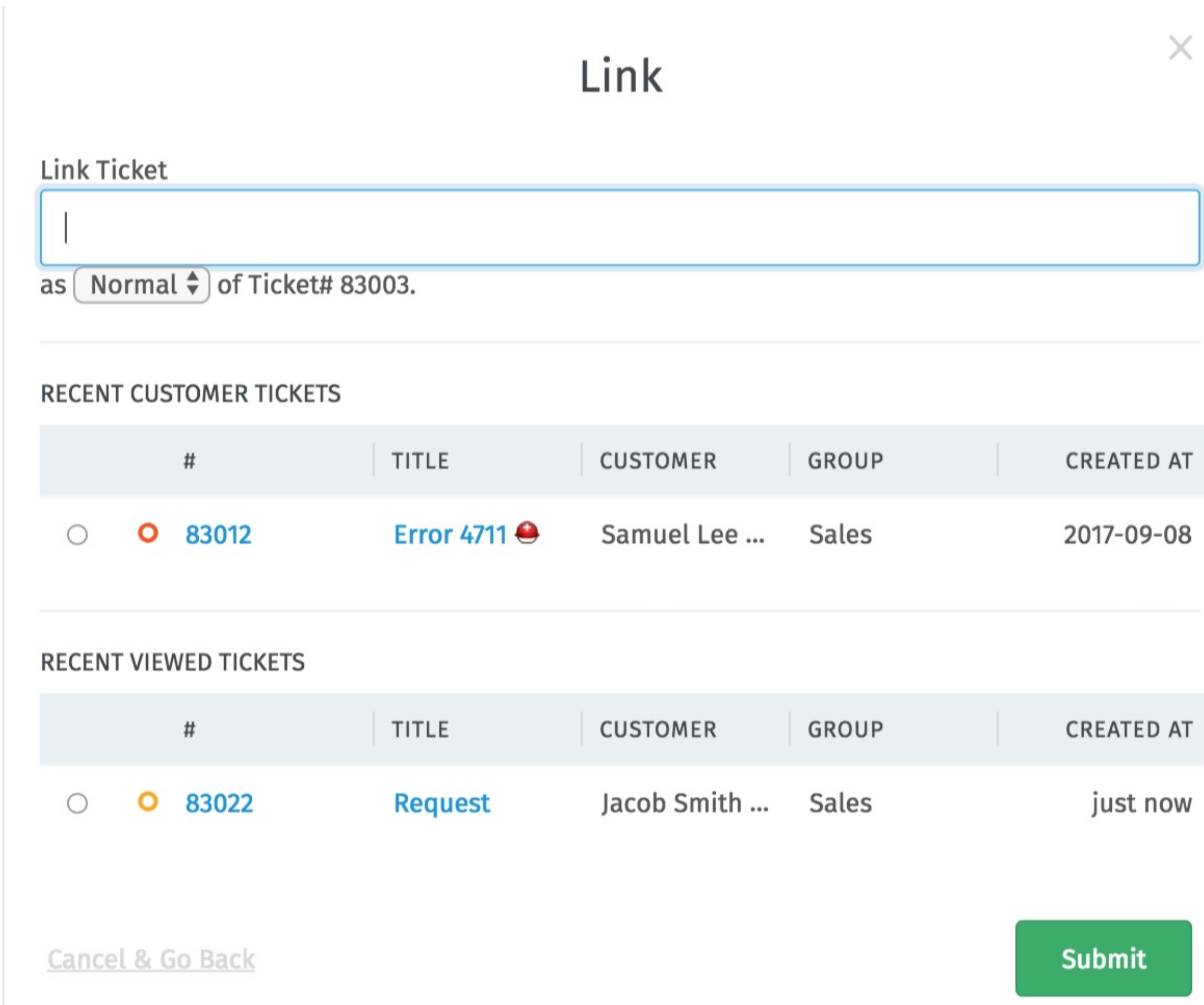



Fig. 7: The link dialog. Specify a ticket to link with by ID (1), or select one from the list (2).

CHAPTER 5

# Tabs

As you click through Zammad, you will see a list of entries appear in the main menu area. These are your **open tabs.**

**Note:** You can freely switch between open tabs without losing your work – all unsaved changes are automatically backed up to the server.

**Tip: UI Protip**

- *Ticket states* are **color-coded:**

| | |
|---|---|
| | **Closed** |
| | **Postponed** (Marked as pending; no immediate action required.) |
| | **New / Open** (Ready for action.) |
| | **Escalated** (Requires urgent attention.) |

- A **pulsing dot** means that a ticket has new activity since you last viewed it.
- Drag and drop tabs to rearrange them.

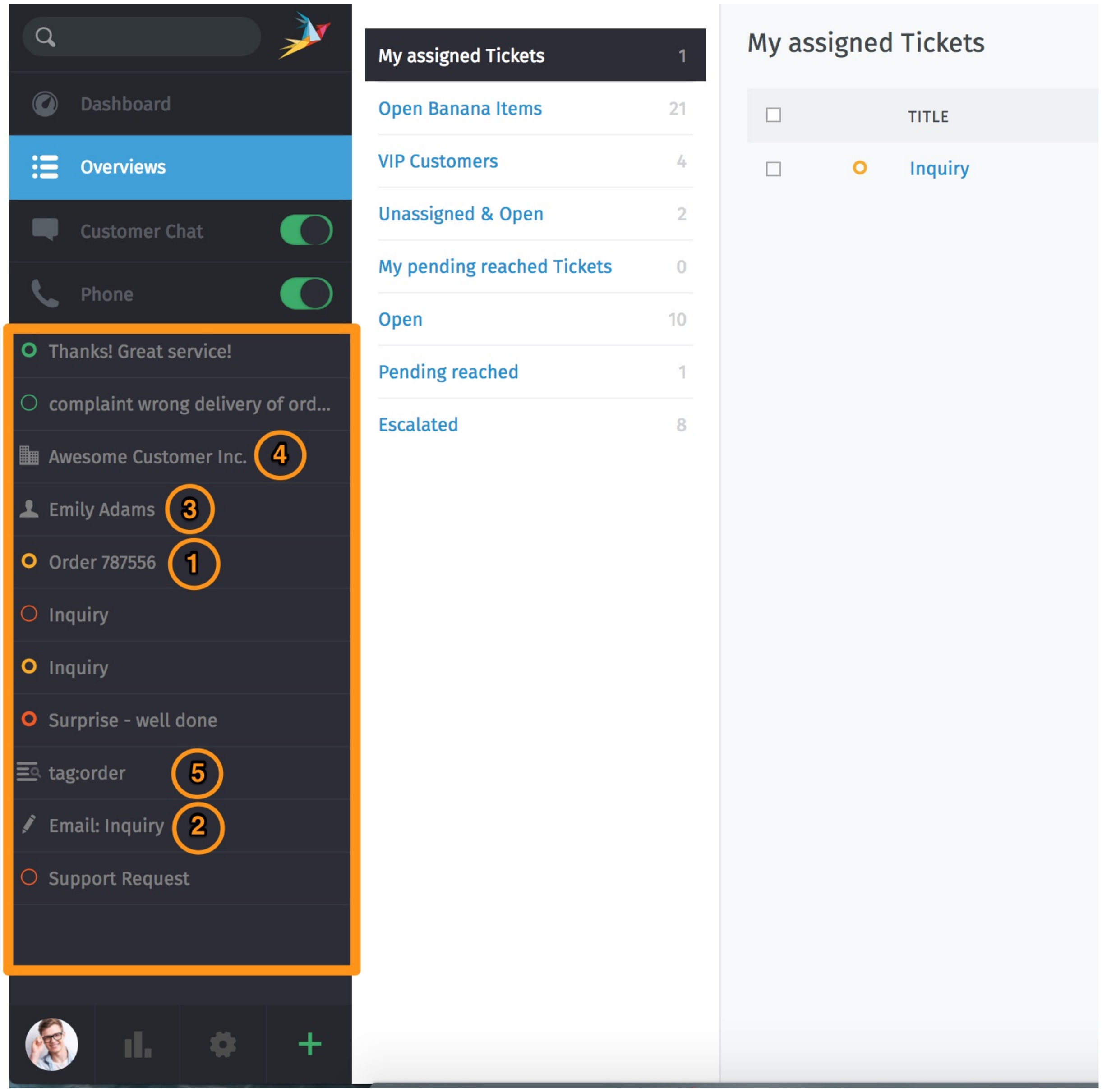



Fig. 1: Tabs appear in the main menu as you visit different parts of the application.

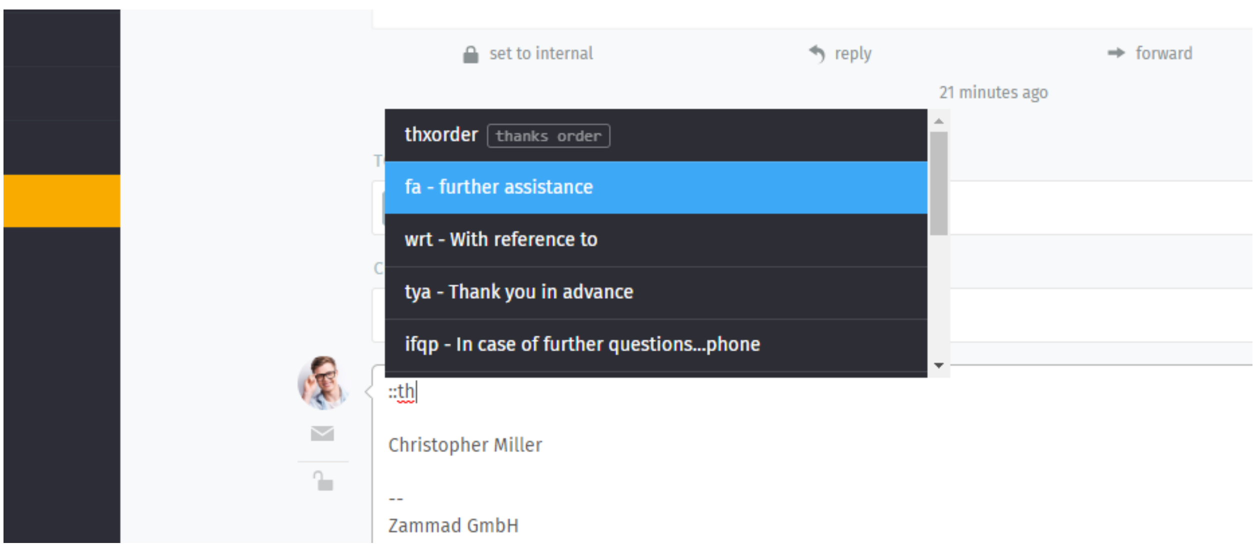
| What items open in a new "tab"? |
|---|
| 1. Existing tickets |
| 2. New tickets |
| 3. Users |
| 4. Organizations |
| 5. Omnisearch |

CHAPTER 6

# Working with Text Modules

Zammad offers so-called text modules. Text modules will help you to improve your workflow, as you don't have to type your answer on every ticket by hand. You can simply choose a fitting text module and insert it into the E-Mail.

To access available text modules, simply type `::` within an article body. If you found the right text module, just press enter or click with your left mouse and Zammad will insert the modules Text at the place your cursor is.




**Tip:** You can either scroll through all modules (mouse or direction keys), type the module name or enter a keyword (if keywords are set).

**Note: How come some text modules don't always appear?**

Text modules can be tied to **groups**: that is, they only become active once the ticket you're working on has been assigned to the appropriate group.

Fig. 1: Text modules are updated immediately when a new group has been selected—no need to click **Update**.

How do you which groups go with which text modules? Ask your administrator!

## 6.1 Text modules on ticket creation

You can use text modules on ticket creation as well. On ticket creation, our *Ticket Templates* might get handy too.

## 6.2 Customizing text modules

Administrators can learn more about customizing text modules here.

CHAPTER 7

# Ticket Templates

If you find yourself creating lots of tickets with the same basic attributes, use **ticket templates** to fill them in next time with a single click.

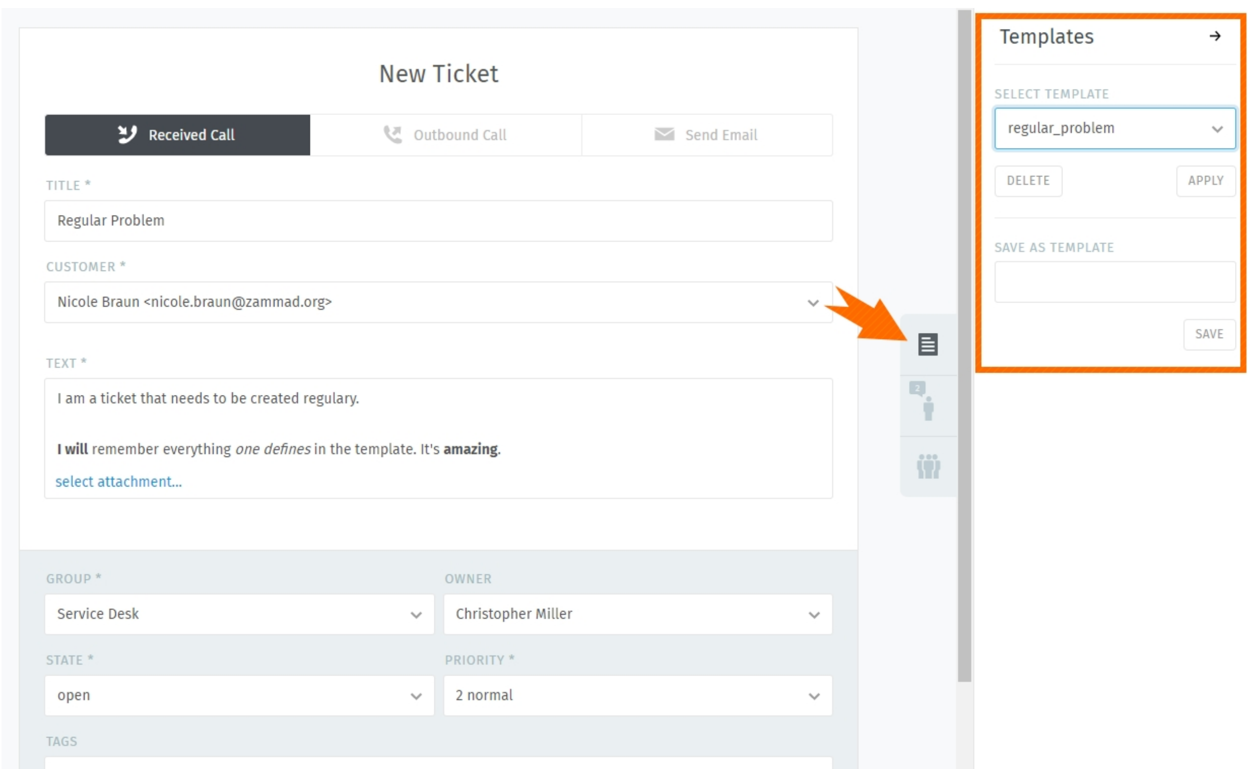



Fig. 1: Use the ticket pane to load or create ticket templates.

To create a new template, start by filling in a new ticket as usual. Then, instead of submitting the ticket form, use the **template dialog** in the ticket pane to enter a name for your new template, and click "Save".

The next time you create a ticket, you'll find your new template in the "Select template" dropdown. Click it to apply your saved attributes to the new ticket.

**Hint:** Any template created by any agent will be available to **all** agents.

# CHAPTER 8

# Advanced Search

With Zammad, you can limit your search to specific Information. This allows you to find e.g. Tickets with specific key words and states. Below information will help you to improve your search results.

For instance you can search for a specific customer by using `customer.attribute`:

```
customer.firstname: John
```

or:

```
customer.lastname: Doe
```

If you want to run a more complex search you can use conditions with `()` and `AND`/`OR` options:

```
state.name: open AND (article.from:me OR article.from:somebody)
```

## 8.1 Available attributes

**Hint:** For a more detailed list of available attributes please take a look into our Zammad Admin-Documentation

Table 1: Attributes and their usuage

| Attribute | possible Values | Example | Description |
|---|---|---|---|
| number | 1118566 | number:1118566 number:11185* | Search for a Ticketnumber |
| title | some title | title:"some title" title:Printer title: "some ti*" | If you need to use spacings in the search phrase, use quotes. Zammad will do a AND-Search over the given words. You can also use a single keyword without quotation. |
| created_at | 2018-11-18 | created_at:2018-11-18 created_at:[2018-11-15 TO 2018-11-18] created_at:>now-1h | You can either use a simple date, a date-range or >now-xh. Please note that the date format needs to be YYYY-MM-DD |
| state.name | new open closed | state.name: new state.name:new OR open | You can filter for specific ticket states (and even combine them with an OR). Please note that you need to use the english namings for states, unless you have custom ticket states defined in your instance. |
| article_count | 5 [5 TO 10] [5 TO *] [* TO 5] | article_count:5 article_count: [5 TO 10] article_count:[5 TO *] article_count:[* TO 5] | You can search for Tickets with a specific number of articles (you can even search for everything with 5 or more articles or even up to 5 articles, if needed). |
| article.from | *bob* | article.from:*bob* | Show all tickets that contain articles from "Bob" |
| article.body | heat heat~ /joh?n(ath[oa]n)/ | article.body:heat article.body:heat~ article-body:/joh?n(ath[oa]n)/ | First example shows every ticket containing the word "heat" - you can also use the fuzzy operator "~" to search for similar words like e.g. like "head". Zammad will also allow you to use regular expressions, where ever the attributes allows it. |

**Hint: Combining search phrases**

You can combine search phrases by using `AND`, `OR` and `TO`, depending on the situation and phrases you use. If needed, you can parts of your search phrase for complex searches with `()`. This allows you to combine several phrases with different dependencies (AND/OR). In case you receive search results that you want to exclude, you can use negation `!`. Below are some examples that you could use with this:

Table 2: Examples for search phrase combinations

| Search phrase | Description |
|---|---|
| state.name:(closed OR open) AND (priority.name:"2 normal" OR tags:feedback) | Show every ticket that state is either closed or open and has priority normal or the tag feedback. |
| state.name:(closed OR open) AND (priority.name:"2 normal" OR tags:feedback) AND !(*Zammad*) | This gets the same result as above, expect that we don't want the ticket to contain anything matching to "Zammad" |
| owner.email:bob@example.net AND state.name:(open OR new) | Show Tickets from bob@example.net that are either open or new |
| state.name:pending* AND article_count:[1 TO 5] | Show everything with any pending state and an article count of 1 to 5. |

## 8.2 Some Ticket attributes and their type

Below you can find the most important attributes sorted by ticket and article.

### 8.2.1 Ticket attributes

- number: string
- title: string
- group: object (group.name, ...)
- priority: object (priority.name, ...)
- state: object (state.name, ...)
- organization: object (organization.name, ...)
- owner: object (owner.firstname, owner.lastname, owner.email, ...)
- customer: object (customer.firstname, customer.lastname, customer.email, ...)
- first_response_at: timestamp
- first_response_in_min: integer (business min till first response)
- close_at: timestamp
- close_in_min: integer (business min till close)
- last_contact_at: timestamp (last contact by customer or agent)
- last_contact_agent_at: timestamp (last contact by agent)
- last_contact_customer_at: timestamp (last contact by customer)
- create_article_type: string (email|phone|web|...)
- create_article_sender: string (Customer|Agent|System)
- article_count: integer
- escalation_at: timestamp
- pending_time: timestamp

### 8.2.2 Article attributes

- article.from: string
- article.to: string
- article.cc: string
- article.subject: string
- article.body: string
- article.attachment.title: string (filename of attachment)
- article.attachment.content: string (content of attachment)
- article.attachment.content_type: string (File type e.g. PDF)

CHAPTER 9

# Macros

Macros are **one-click shortcuts** for applying changes to a ticket.

If you find yourself making the same changes to lots of tickets (*e.g.,* close-and-tag-as-spam or reassign-to-another-group), macros can make the job a whole lot easier.

---

**Note: How do I make macros?**

You don't – that's the administrator's job. If you have an idea for a macro you'd like to use, your Zammad admin can probably make it happen.

---

Macros can be applied in one of two ways: on a single ticket, or in bulk.

## 9.1 On a Single Ticket

The simplest way to apply a macro is to select it from the **Update** submenu in the Ticket View:

---

**Tip: Macro = Update**

If you've made changes to any other *settings on the ticket* (including typing up a reply to the customer), applying a macro will save them, too.

**But beware:** in the event of a conflict, the macro's actions override any manual changes – including messages to the customer! When in doubt, apply your macro and your manual changes *separately.*

Fig. 1: If the selected macro adds a note to the ticket, any text entered in the message composer will be lost.

---

## 9.2 In Bulk

To apply a macro to many tickets at the same time:

1. open a ticket overview;
2. select your desired tickets;
3. click-and-drag to open the “Run Macro” drawer; and
4. drop the tickets on your target macro.

---

**Note: There’s just one difference…** When running a macro from the ticket view, Zammad may automatically open the next ticket (or close the current one, or just stay on it), depending on how the macro was set up.

When running it from the overviews page, Zammad will always stay on the overviews page.

---

# CHAPTER 10

# Suggested Workflows

## 10.1 Sharing Work on a Ticket

Some tickets require attention from more than one agent (or even more than one department!). In these cases, there are three ways to assign the work to the right people:

1. If a ticket is really about two different problems, you can *split it in two*, then assign each ticket to its respective "group" (department).
2. If you've done all you can on a ticket and it's now another agent's (or department's) responsibility, **reassign it** to a new owner (or group).
3. If you just need another agent's input on something, you can **@mention** them. (And if *you* want to get notifications for *someone else's* ticket, use the **subscribe button**.)

### 10.1.1 Reassigning tickets

Suppose a call comes into the sales department. A sales rep takes the call, creates a ticket, and looks up some prices for the customer. After recording his notes, the rep then decides that this ticket needs to be passed onto customer service.

Our sales rep can simply un-assign himself has the **owner** of the ticket and re-assign the ticket to the Customer Service **group**. *All customer service agents will be notified of the incoming ticket*, and the first available agent can assign herself to pick up where the sales rep left off.

**Tip:** Be sure to leave notes with as much information as possible for the next agent!

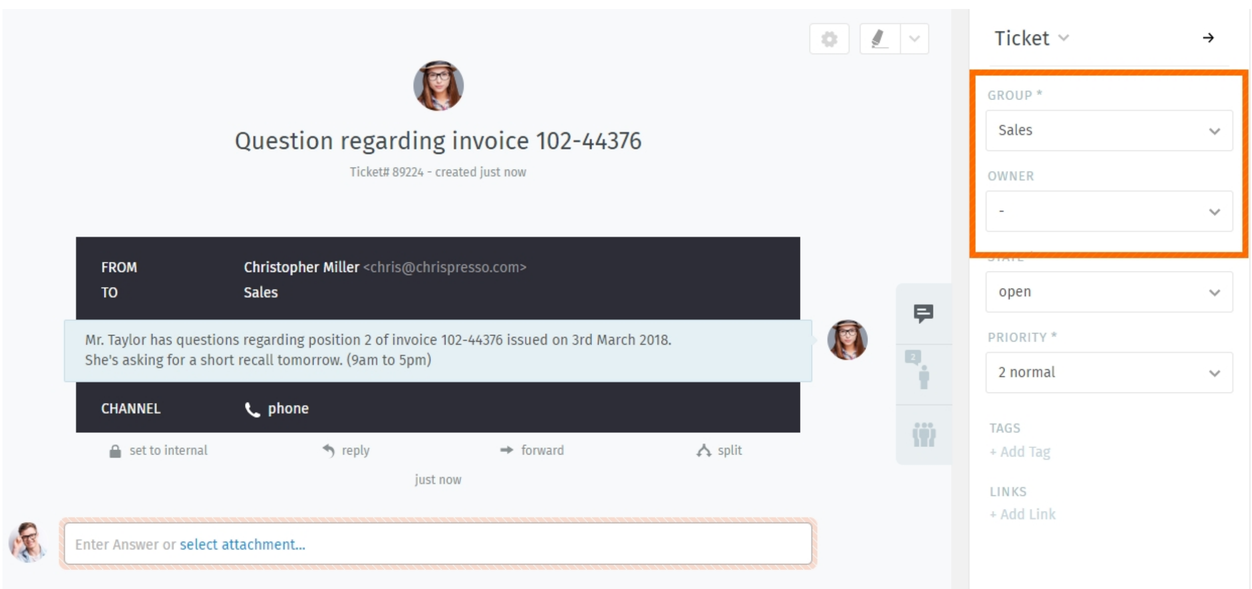



Fig. 1: Reassign a ticket (via the *Group* and *Owner* settings) to let colleagues know you're done with your part.

CHAPTER 11

# Time Accounting

Zammad supports detailed time accounting to help administrators keep track of how much time you spend on any given ticket, customer or client organization.

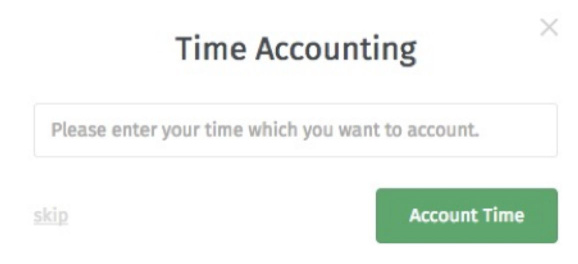



Fig. 1: If time accounting is enabled, this dialog will appear each time you update a ticket. Enter how much time you spent on it (in minutes, or whichever unit of time all your other colleagues are using).

**Note: Huh? I don't see a "Time Accounting" dialog…**

This feature is **optional**; if you don't see it whenever you update a ticket, that means your administrator hasn't enabled it yet. Administrators can learn more here.

# CHAPTER 12

# Keyboard Shortcuts

Zammad supports a wide array of keyboard shortcuts to expedite your workflow as an expert user.

**Tip: UI Protip**

Click on your avatar at the bottom of the main menu to access the **keyboard shortcuts cheat sheet**.

Alternately, bring it up with one of the shortcuts below (shortcut-ception!)

- `Ctrl` + `Shift` + `H` (on Windows)
- `Ctrl` + `Shift` + `H` (on Linux)
- `Cmd` + `Ctrl` + `Shift` + `H` (on macOS)

## 12.1 Formatting Text

Keyboard shortcuts can be used to apply rich-text formatting in one of two ways:

**As-you-type**

- Press `Cmd` + `I` to enter Italics mode,
- enter your desired text, and
- press `Cmd` + `I` again to return to normal text mode.

**All-at-once**

- Enter your desired text,
- click-and-drag with the mouse to select it, and
- press `Cmd` + `I` to italicize.

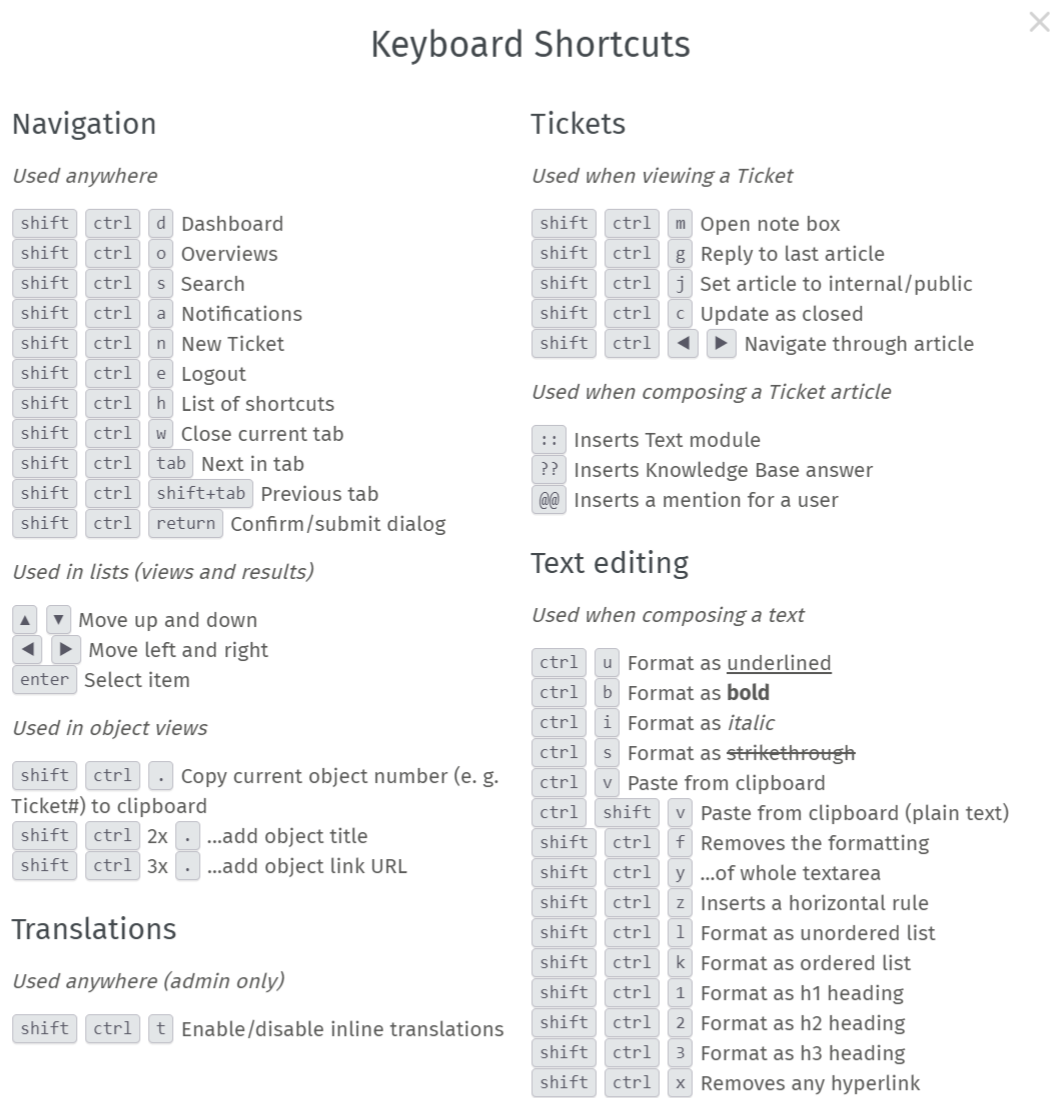
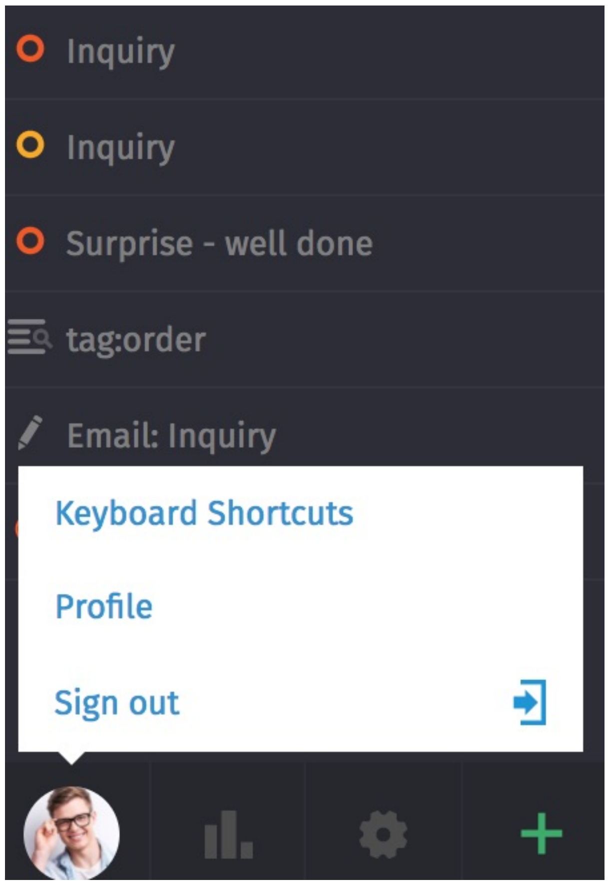



Fig. 1: The keyboard shortcut cheat sheet on Windows.


Inquiry
Inquiry
Surprise - well done
tag:order
Email: Inquiry
Keyboard Shortcuts
Profile
Sign out

# CHAPTER 13

# Customers

Use the **ticket pane** to manage customer profiles.

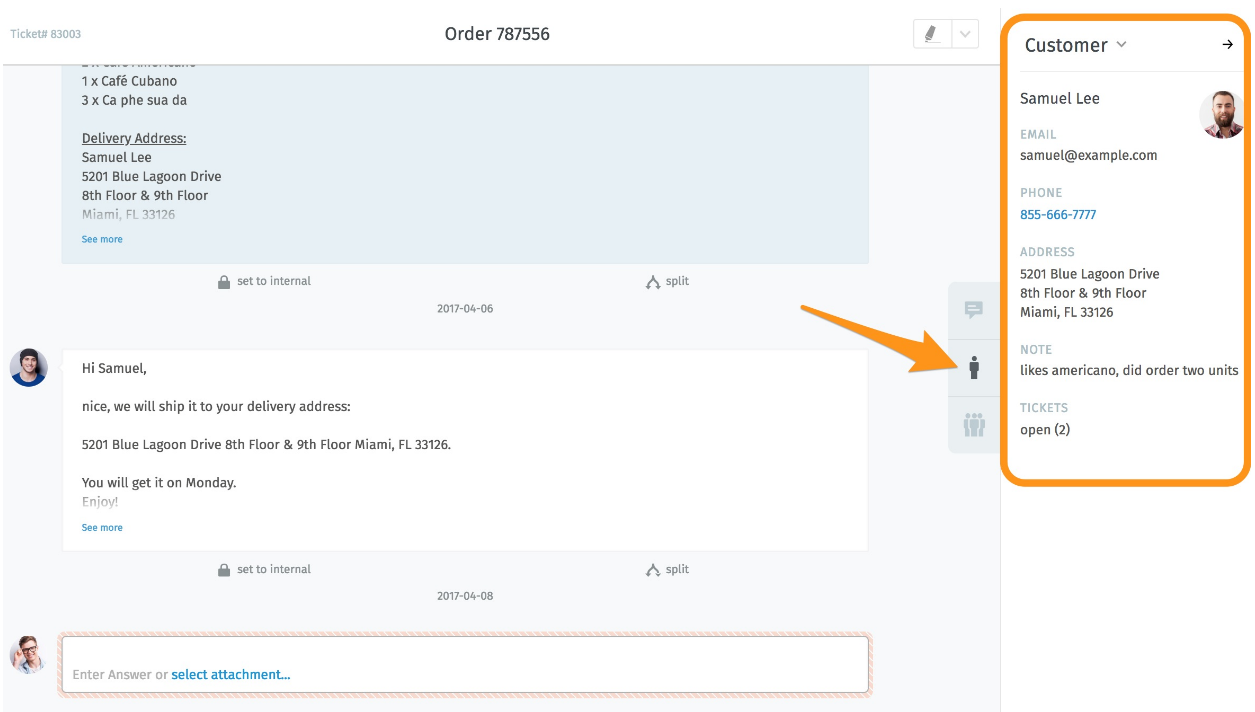



Fig. 1: Click the  tab in the ticket pane to see the customer's profile.

**Tip: UI Protip**

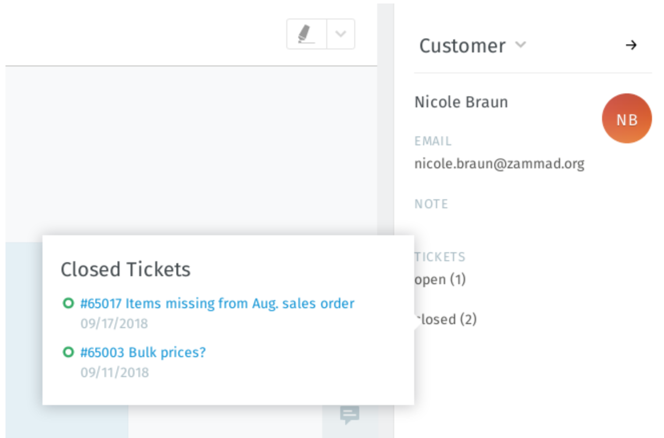



Fig. 2: Hover over the **open/closed** labels to see a summary of the customer's other tickets.

## 13.1 Editing a Customer

To edit the customer's profile, use the **customer submenu**:

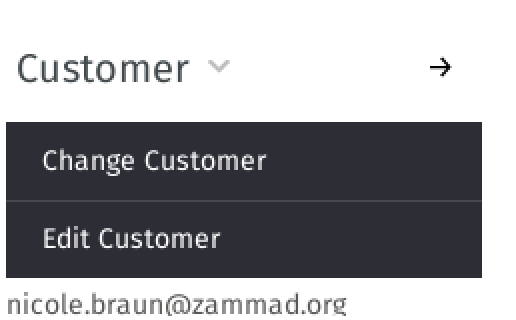



Fig. 3: Click the **Customer** heading to access additional actions.

Most customer attributes are self-explanatory, but here are a couple that might confuse you:

**Organization** Customers may (optionally) belong to **organizations** – *skip ahead* to learn more.

**VIP** Like *ticket priority*, **VIP status** doesn't actually do anything out-of-the-box, but an admin *can* set up automated system hooks based on this value, or use it as a filter for *custom overviews*.

**Ask your administrator** about how she'd like you to use this attribute (or just leave it alone).

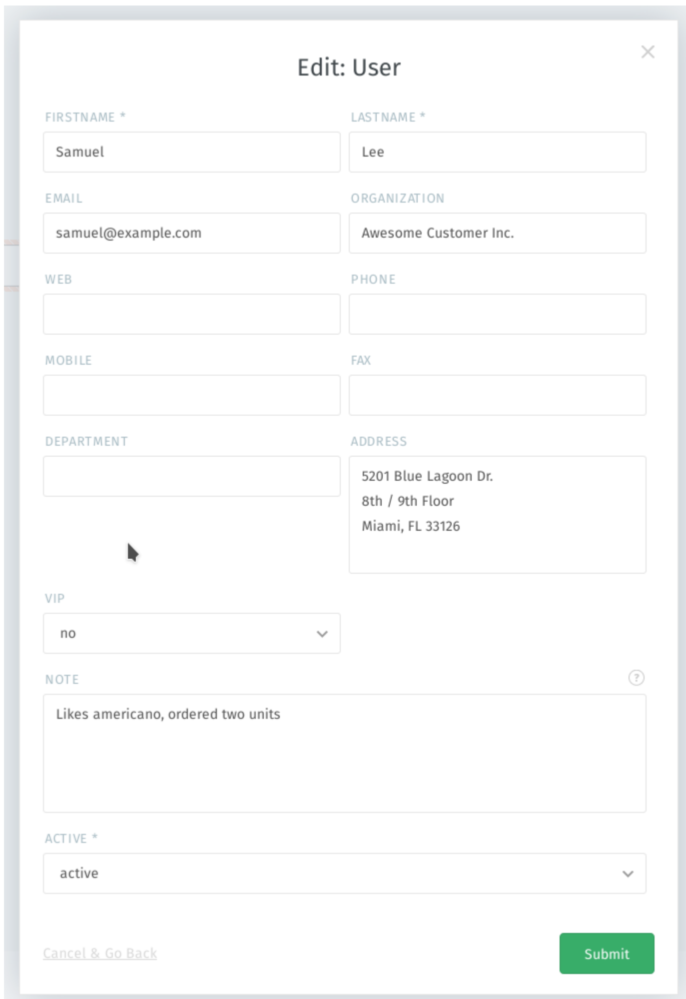



Fig. 4: The edit customer dialog.

# CHAPTER 14

# Organizations

Tickets track communication between individuals, but oftentimes, your company's real client is **another company** (or **organization**). Customers can be grouped into organizations to monitor their activity as a whole.

## 14.1 Organization Profiles

Use the **ticket pane** to manage organization profiles.

To edit the organization's profile, use the **organization submenu**:

## 14.2 Organization Stats

With organizations, you can answer questions like:

- "How many tickets has this company had to file in the last 12 months?"
- "How many tickets does this company have open right now?"
- "How old is the oldest open ticket from this company?"

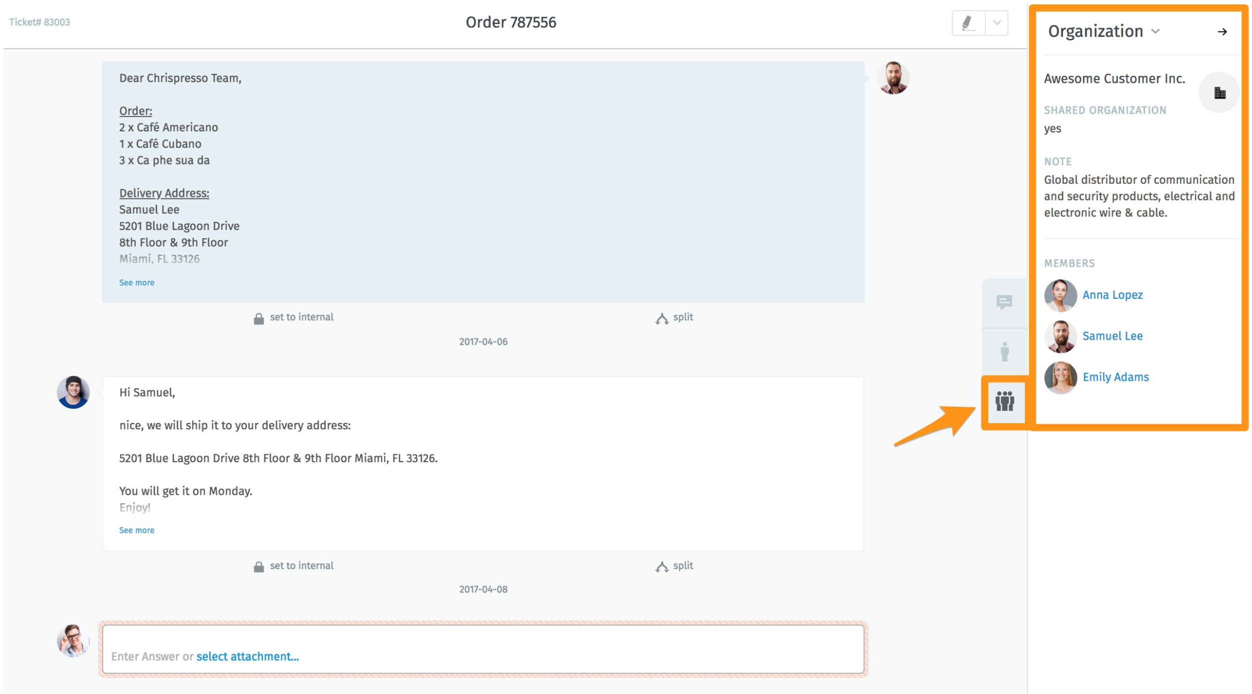



Fig. 1: Click the  tab in the ticket pane to see the organization's profile.

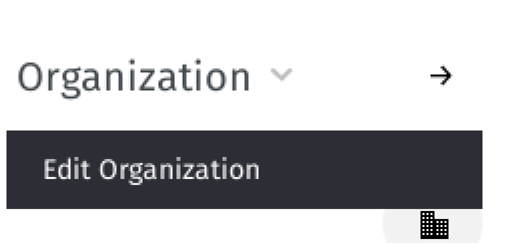



Fig. 2: Click the **Organization**  heading to access additional actions.

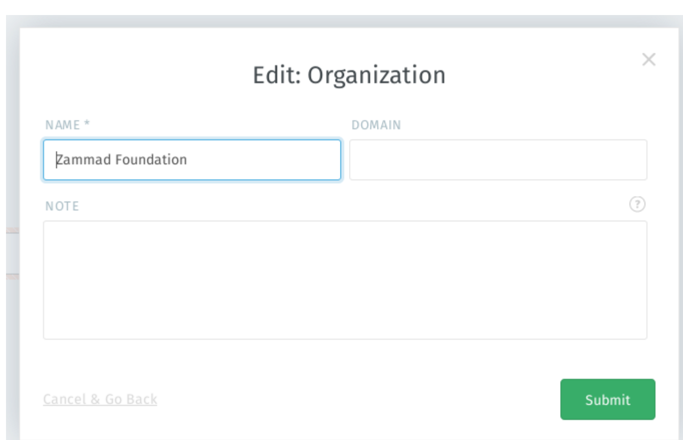



Fig. 3: The edit organization dialog.

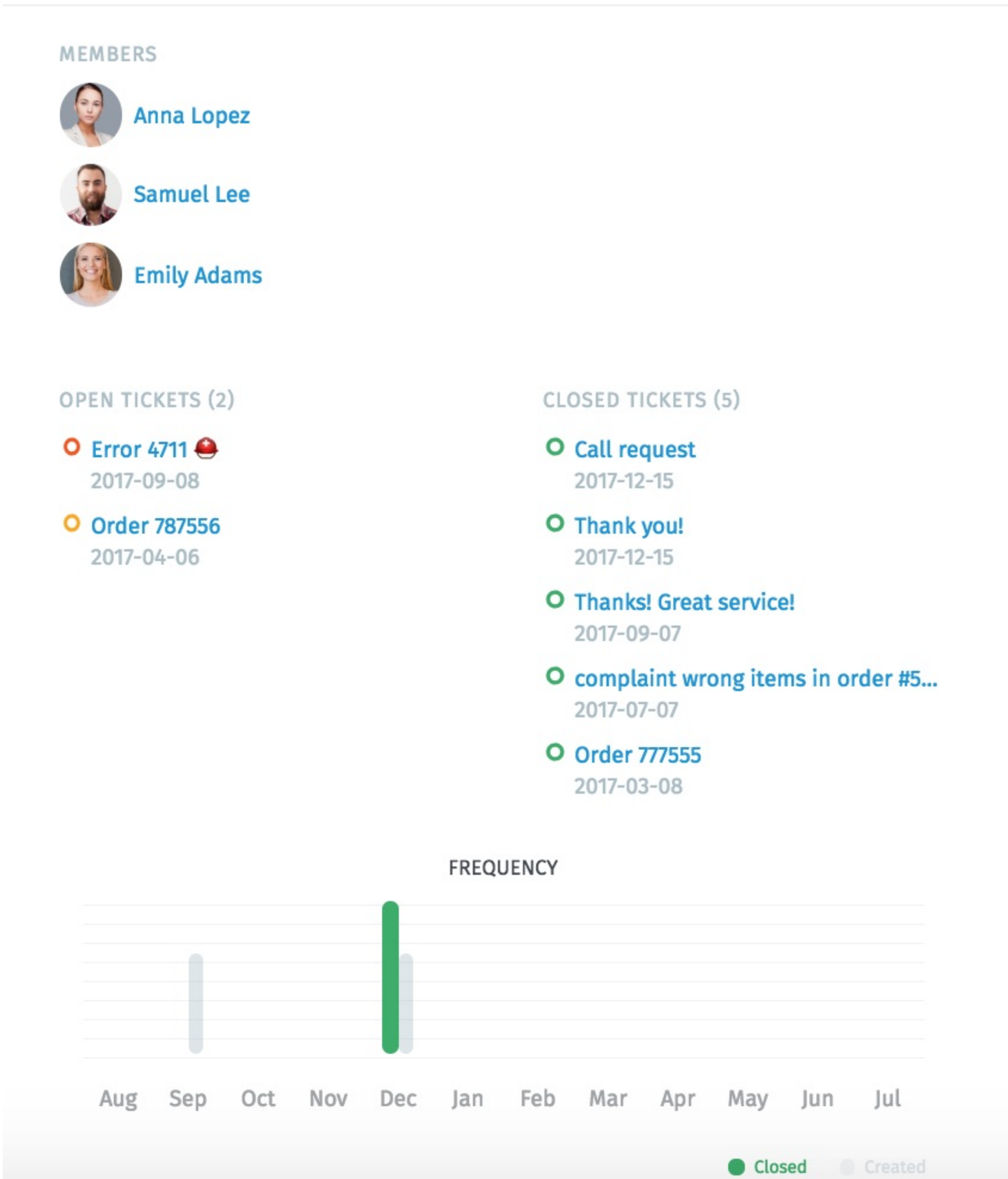



Fig. 4: Click the  button in the ticket pane to see a detailed breakdown of the organization's stats.

# CHAPTER 15

## Checking Your Stats

The **dashboard** is the first thing you'll see after logging in. Monitor your productivity at a glance, compare your stats to the company average (in gray below your own), and see what everyone else is up to.

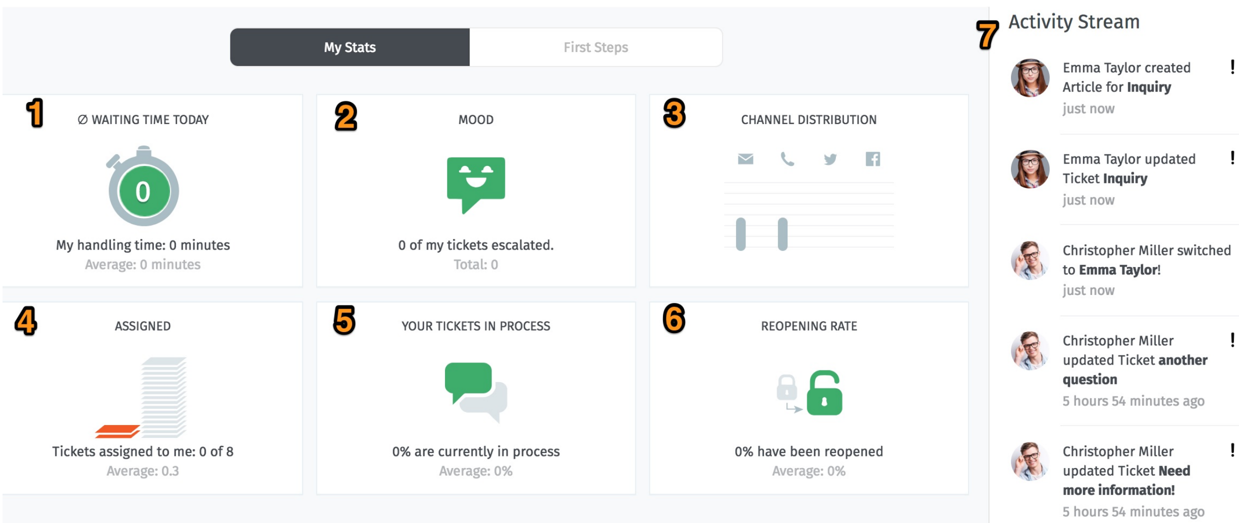



Fig. 1: Check the dashboard for a quick summary of your stats (updated every 30 minutes).

| Legend | |
|---|---|
| **1. Waiting Time Today** | How long has each customer had to wait, on average, to get a response from you today? |
| **2. Mood** | How many escalated tickets do you have open right now? (Mr. Bubbles gets grumpy if you have too many. . . ) |
| **3. Channel Distribution** | Where are all your tickets coming from? (Shows tickets created in the last seven days, also sorted by **inbound** vs. **outbound**.) |
| **4. Assigned** | Out of all open tickets (company-wide), how many are currently assigned to you? |
| **5. Your Tickets in Process** | What percentage of your tickets have you responded to or updated in the last 24 hours? |
| **6. Reopening Rate** | How many of your closed tickets have been re-opened in the last seven days? |
| **7. Activity Stream** | What's everyone else on your team up to? |

CHAPTER 16

# Secure Email

Zammad supports S/MIME for high-security email communication.

Fig. 1: Use the **Encrypt** and **Sign** buttons to turn on encryption and signing for outgoing emails.

**Note: Huh? I don't see "Sign" or "Encrypt" options in the ticket view...**

This feature is **optional**; if you don't see it in the ticket composer, that means your administrator hasn't enabled it yet. Administrators can learn more here.

## 16.1 What is S/MIME?

S/MIME is the most widely-supported method for secure email communication. With S/MIME, you can exchange **signed** and **encrypted** messages with others.

**Signing** is proof that a message hasn't been tampered with or sent by an impersonator.

In other words, it guarantees a message's **integrity** and **authenticity**.

**Encryption** scrambles a message so that it can only be unscrambled by the intended recipient.

In other words, it guarantees **privacy** and **data security**.

## 16.2 Overview

**Note: S/MIME only works if the other party is using it, too.**

Your administrator is responsible for adding all the necessary certificates in Zammad's admin panel.

### 16.2.1 Incoming

The  and  icons at the top of a message indicate its S/MIME status.

Fig. 2: Click on an incoming message to expand its details. Hover over the security status to show a certificate/CA summary.

Table 1: Status Icons (Incoming)

| | |
|---|---|
| | This message was **encrypted for you**.<br>Even if it was intercepted by a third party (hacker, gov't agency, etc.), they won't be able to read it. |
| | This message is **not encrypted**. |
| | This message's signature has been **successfully verified**.<br>You can be confident that it's authentic and that the contents have not been modified. |
| | This message is **not signed**. |

### 16.2.2 Outgoing

Use the **Encrypt** and **Sign** buttons to turn on encryption and signing for outgoing emails.

**Note:** Outgoing emails can only be encrypted for *a single recipient*.

Fig. 3: **Encrypt** and **Sign** buttons are present on both new tickets and replies. Hover over the buttons to show a certificate/CA summary.

Table 2: Status Icons (Outgoing)

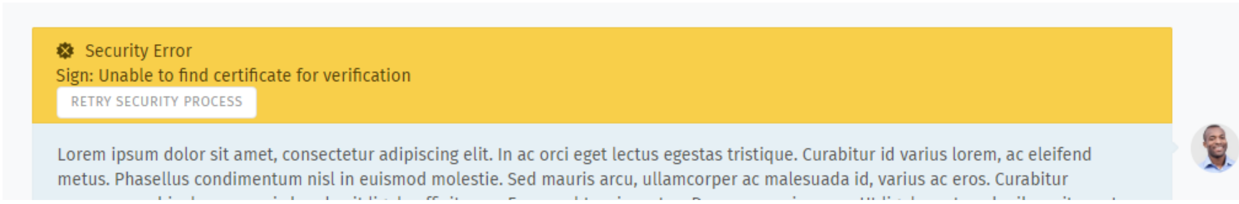
| | |
|---|---|
| | This message **will be encrypted**.<br>Even if it's intercepted by a third party (hacker, gov't agency, etc.), they won't be able to read it. |
| | This message **will not be encrypted**. |
| | This message **will be signed**.<br>Recipients using S/MIME can verify that it came from you and that the contents have not been modified. |
| | This message **will not be signed**. |

## 16.3 Troubleshooting

### 16.3.1 Incoming

**"Sign: Unable to find certificate for validation"**

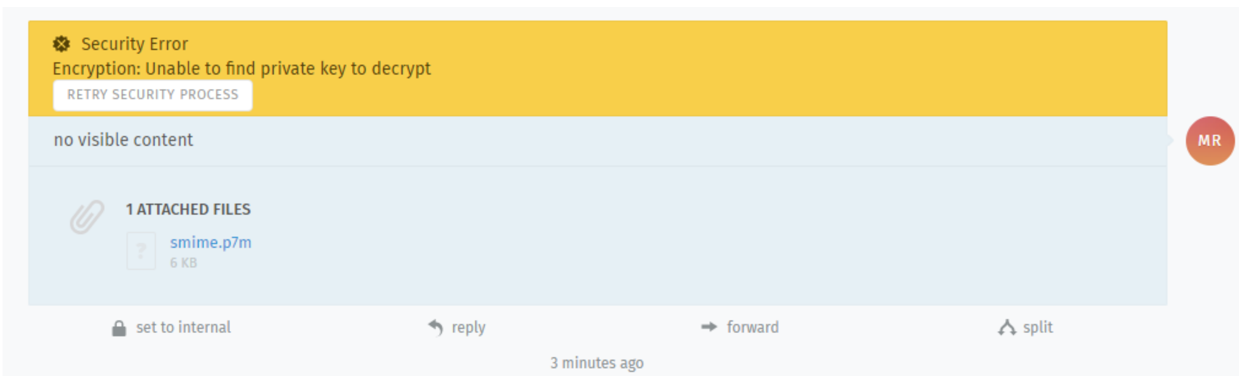
Without the sender's certificate, Zammad cannot verify the message signature.




Ask your administrator to add the sender's certificate to Zammad's certificate store.

> **Warning: ALWAYS verify certificates in-person or over the phone!**
>
> The whole point of signature verification is to alert you when someone is trying to pretend to be someone they're not. Never accept a certificate from someone online without verifying it first.

**"Encryption: Unable to find private key to decrypt"**




This message was encrypted with a certificate that does not match any on file. Without a matching private key, Zammad cannot decrypt the message.

Ask your administrator to verify your organization's private key in Zammad's certificate store, and ask the sender to double-check the public key they used to encrypt the message.

> **Hint: Your public key can be safely shared with anyone.**
>
> (But if they're smart, they'll take extra precautions to make sure it really belongs to you.)

## 16.3.2 Outgoing

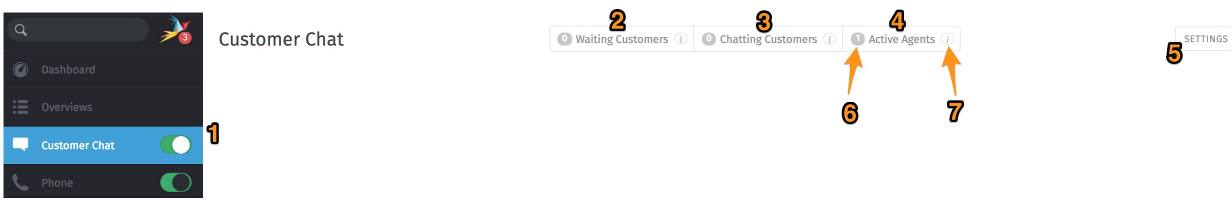
**The Encrypt button is disabled** Ask your administrator to add the recipient's certificate to Zammad's certificate store.

**The Sign button is disabled** Ask your administrator to verify your organization's private key in Zammad's certificate store.

CHAPTER 17

# Live Chat

Talk to customers in real time from the **customer chat** panel.




| Chat controls | |
|---|---|
| **1. On/Off** | Enable/disable the chat panel. (When enabled, you will receive notifications for incoming chats.) |
| **2. Waiting Customers** | Lists customers awaiting an agent for chat. **Click to answer a pending chat request.** |
| **3. Chatting Customers** | Lists customers currently in an ongoing chat session. |
| **4. Active Agents** | Lists all agents with chat enabled. |
| **5. Settings** | Click for chat configuration options (*e.g.,* auto-greetings and maximum number of simultaneous chats). |
| **6. Count badge** | Displays the number of users in each section. |
| **7. Info card** | Hover over for detailed information about the users in each section. |

**Note: Huh? I don't see "Customer Chat" in the menu…**

This feature is **optional**; if you don't see it in the main menu, that means your administrator hasn't enabled it yet. Administrators can learn more here.

**Warning:** If all agents have the chat panel disabled, customers will **not** be able to initiate a chat.

**Tip:**

- Use the *search bar* to pull up old chats from the archive anytime.
- Copy & paste **supports inline images** as well as plain text.
- Live chat supports text modules.
- Chats can be **renamed** or **tagged**, and record technical details about the customer's connection.

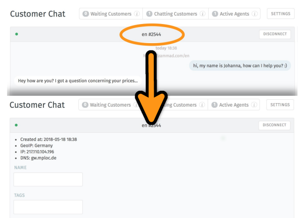



Fig. 1: Click on the title at the top of the chat window to edit chat details.

## 17.1 Creating a Ticket from a Chat

Once your chat is over, you can create a ticket for it with a single click:

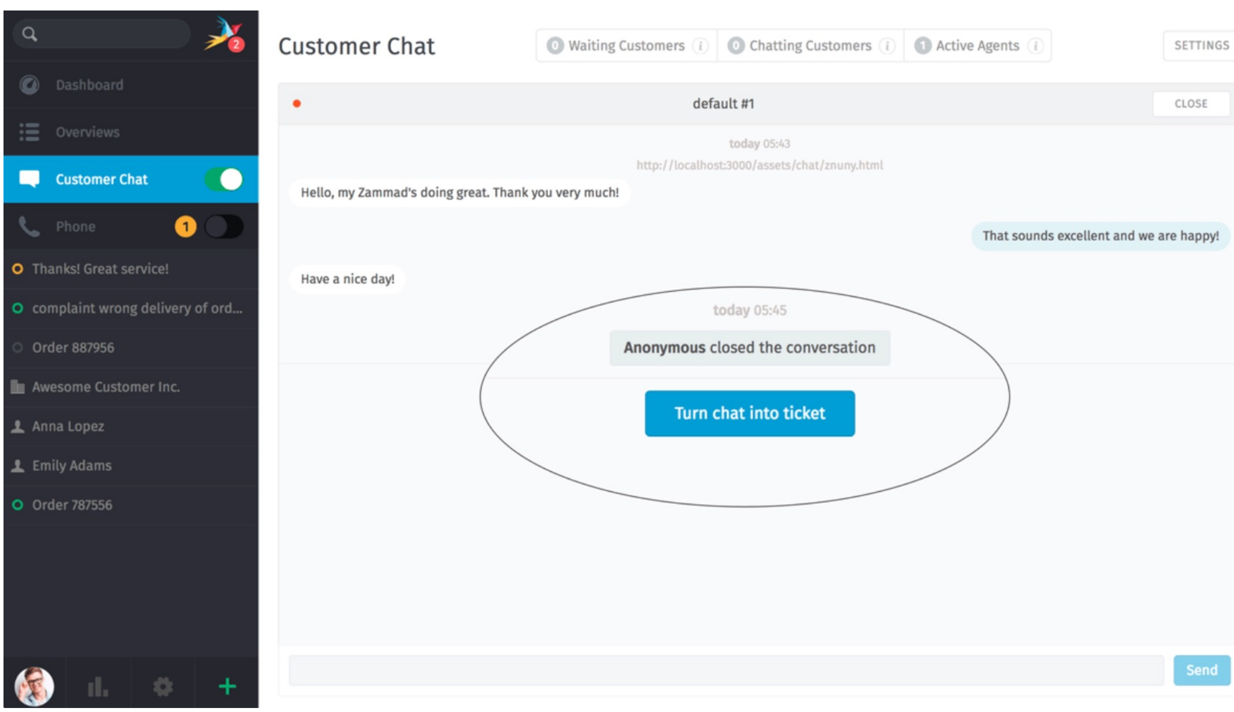



Fig. 2: The **Turn chat into ticket** button appears as soon as the chat is finished.

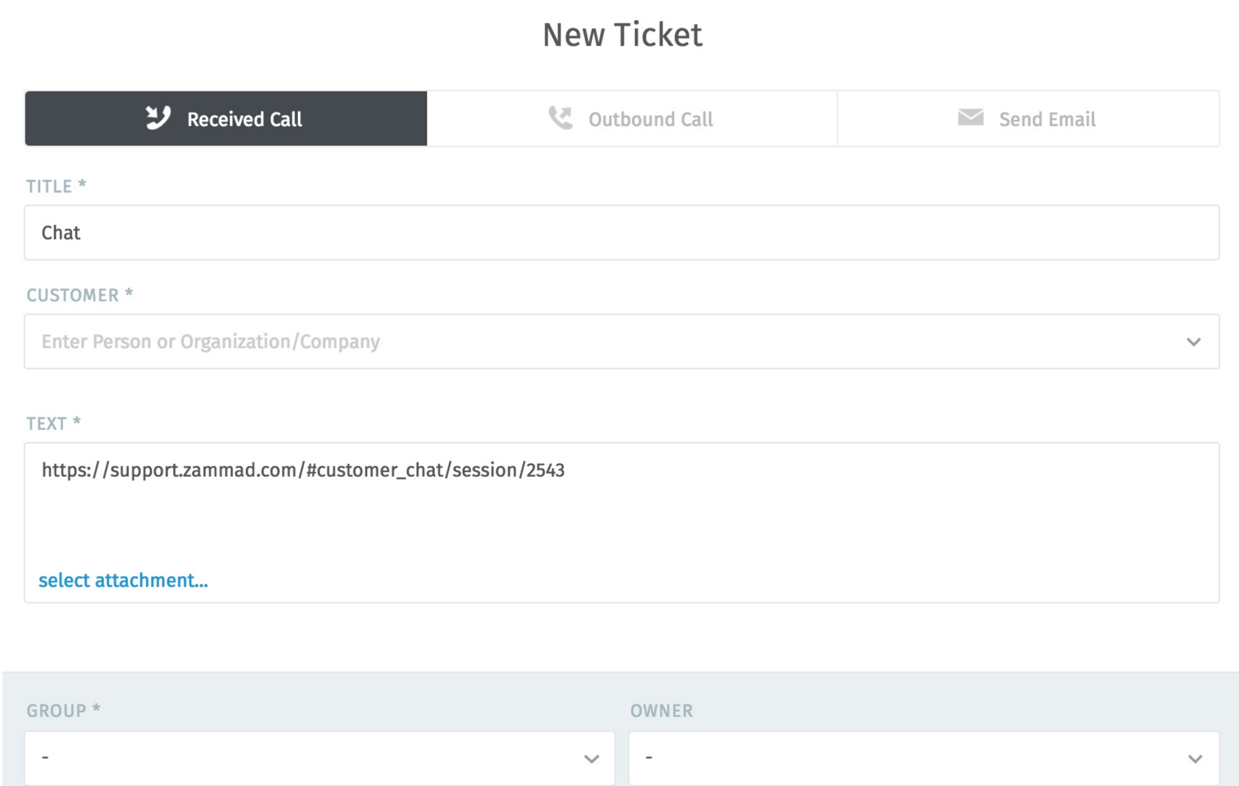



Fig. 3: A link to the chat is automatically included in the first note on the ticket.

CHAPTER 18

# Caller Log

View and manage call logs from the **phone** panel.

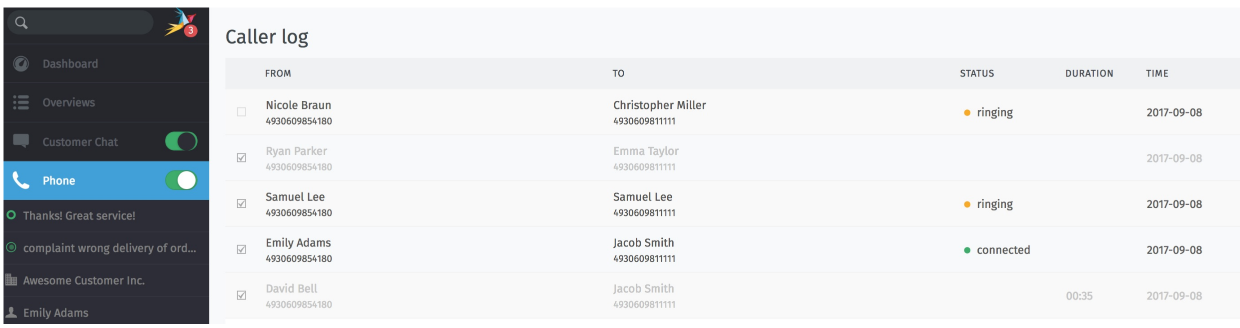



Fig. 1: Enable the **Phone** panel to receive notifications for incoming calls.

**Note: Huh? I don't see "Phone" in the menu…**

This feature is **optional**; if you don't see it in the main menu, that means your administrator hasn't enabled it yet. Administrators can learn more here.

**Hint:** The caller log shows all incoming and outgoing calls **for the entire team**.

**Tip:** Click on unrecognized numbers in the caller log to **create a new customer and ticket**. (Unrecognized phone numbers cannot be added to existing customers in this way.)

# CHAPTER 19

# Profile & Settings

Click on your avatar at the bottom of the main menu to access your **profile and settings**.

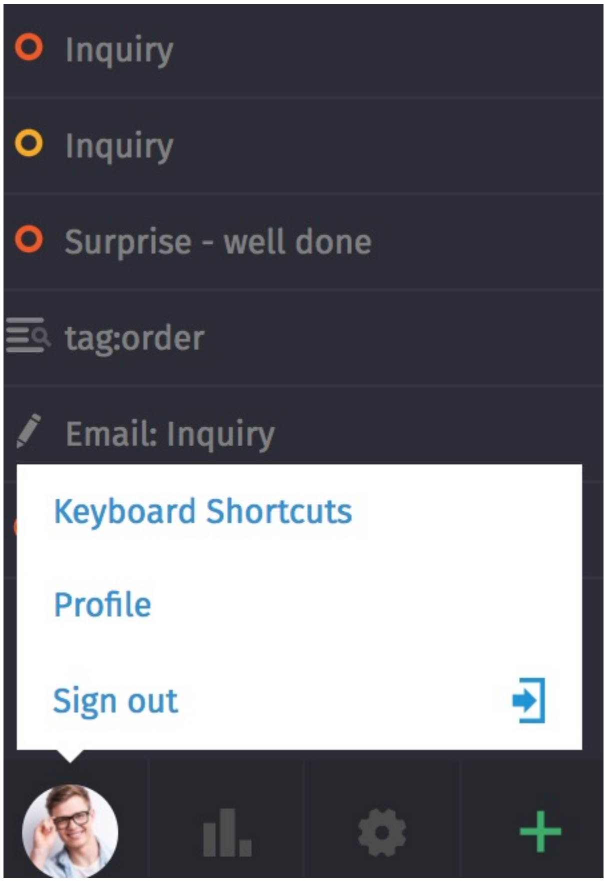



Fig. 1: Find user-specific actions, a list of recently opened items, and useful reference information.

## 19.1 Profile Settings

**Language** Set the system display language.

**Avatar** Upload an avatar.

**Password** Change your login password (may be disabled by system admin).

**Notifications** Select where, when, and for which groups you want to receive notifications, or choose a new notification sound.

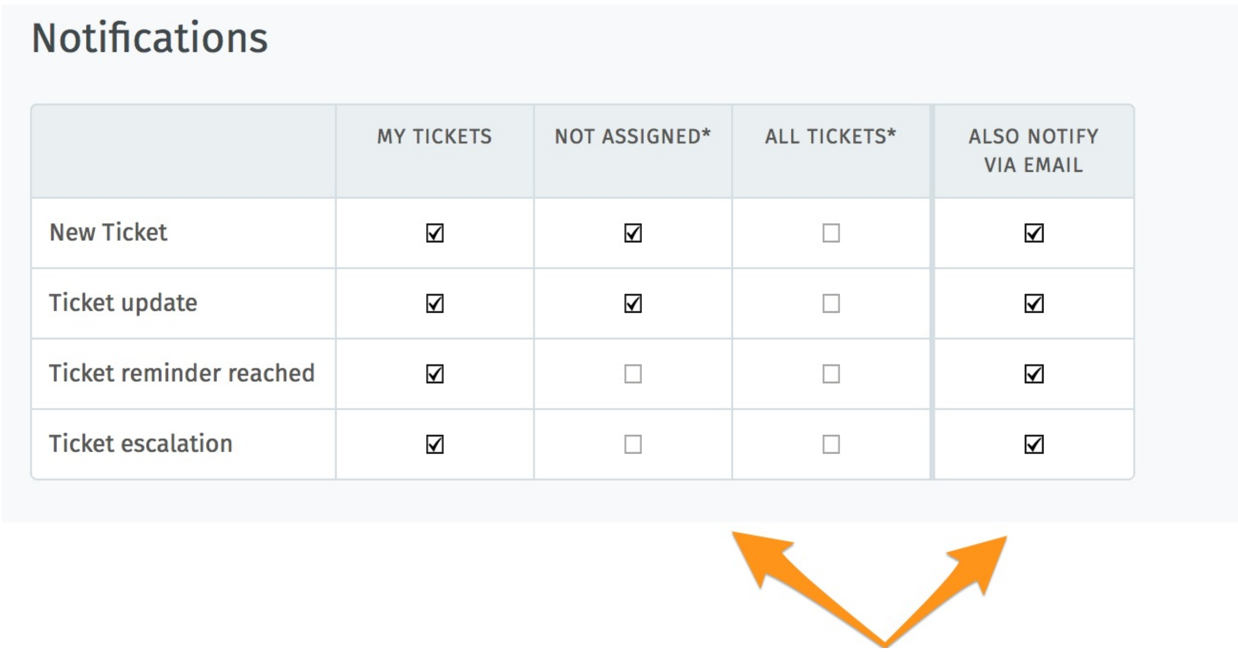



Fig. 2: Use the first three columns to choose when to receive **internal notifications** (below). The rightmost column enables email notification as well.

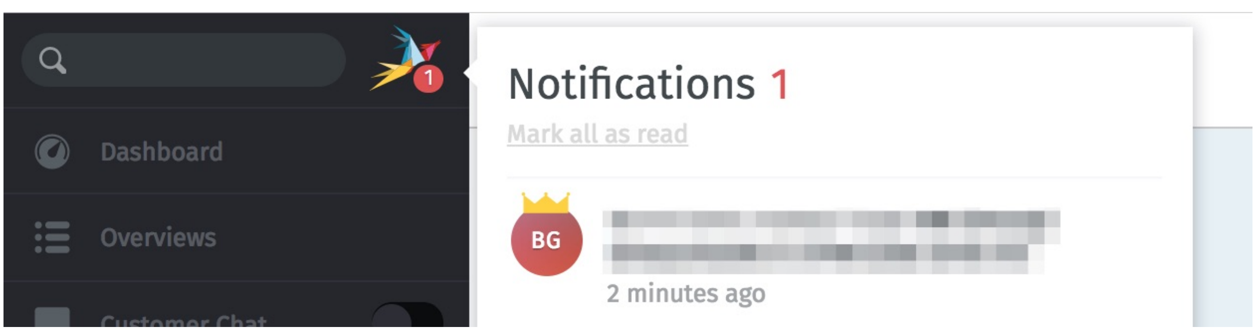



Fig. 3: Internal notifications cannot be disabled.

---

**Hint:** The contents of these email notifications can be customized on self-hosted installations. Administrators can learn more here.

---

**Out of Office** Schedule out-of-office periods in advance, and designate a substitute to handle your tickets while you're gone.

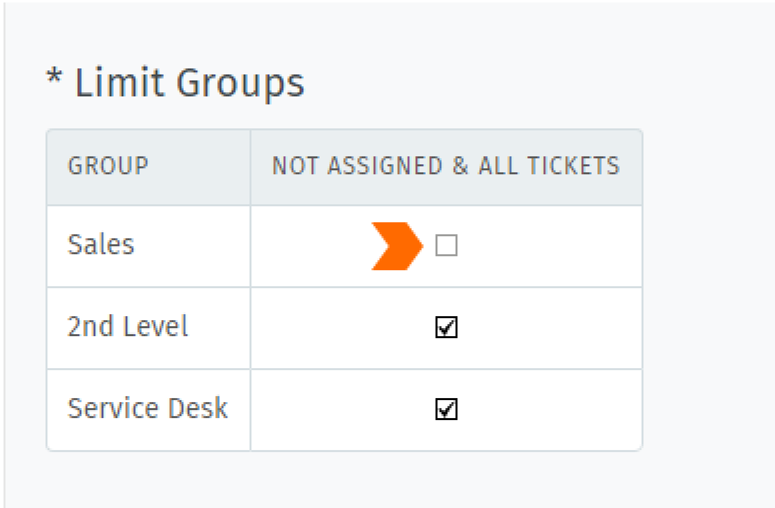



Fig. 4: By default, you will receive notifications for all tickets on every group you belong to—even for tickets that are assigned to other agents. Use the **Limit Groups** box to disable such notifications on a per-group basis. (You will continue to receive notifications for your own tickets.)

Your substitute will receive all your ticket notifications during your absence, and have a custom *overview* created to help keep track of your tickets.

---

**Note:** You **will** continue to receive notifications while you are out-of-office!

---

**Calendar** Add your ticket deadlines to your own favorite calendar app with the ICAL link listed at this settings panel.

**Devices** See a list of all devices logged in to your Zammad account (and revoke access, if necessary).

**Token Access** Generate personal access tokens for third-party applications to use the Zammad API.

> **Caution:** Always generate a new token for each application you connect to Zammad! (This makes it possible to revoke access one application at a time if a token is ever compromised.)

**Linked Accounts** See a list of third-party services (*e.g.,* Facebook or Twitter) linked to your Zammad account.

# CHAPTER 20

# Knowledge Base

Manage, edit, and reorganize knowledge base articles from the **knowledge base** panel.

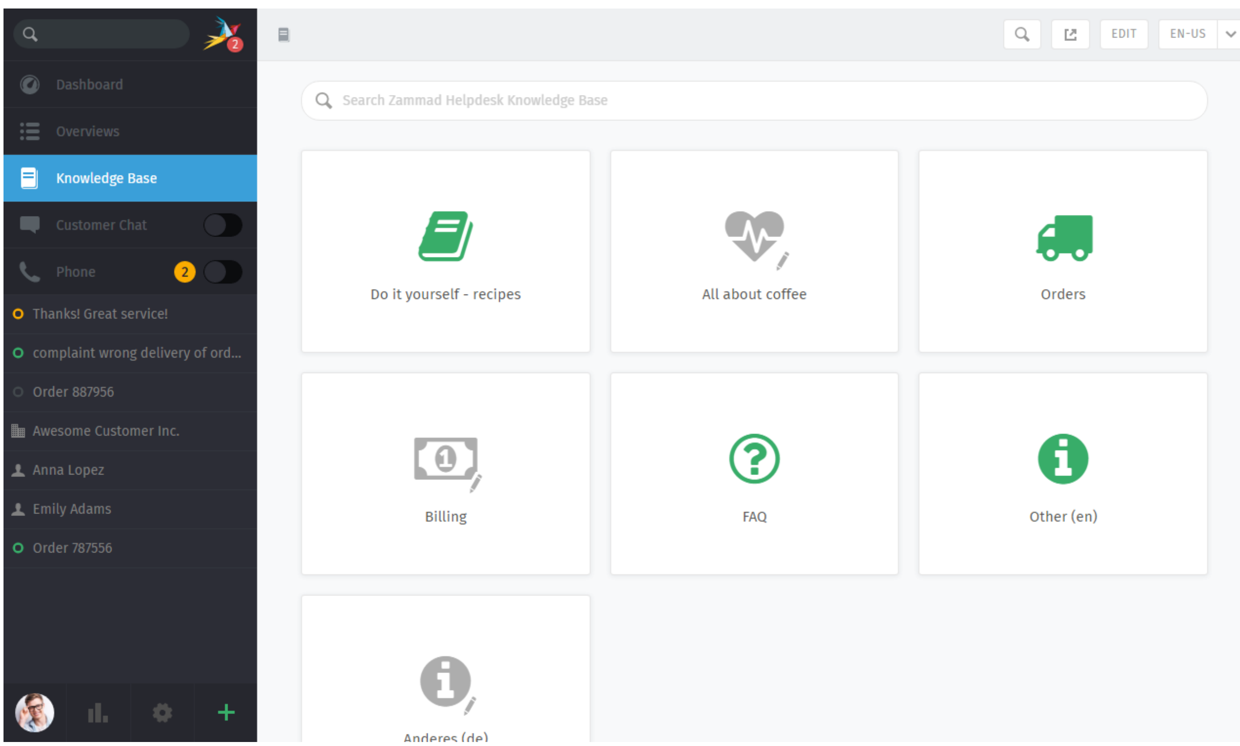
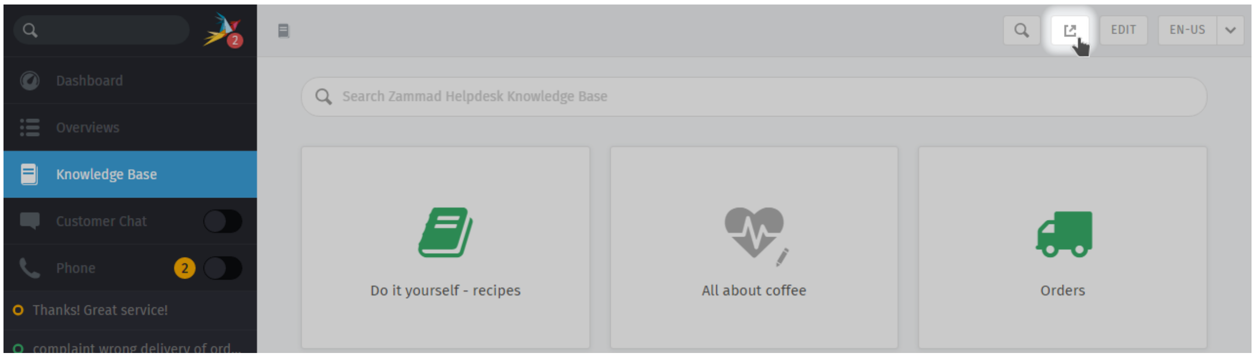



Fig. 1: The knowledge base panel begins in **Preview Mode**. With some small exceptions, Preview Mode shows what the published knowledge base will look like.

**Note: Huh? I don't see "Knowledge Base" in the menu…**

This feature is **optional**; if you don't see it in the main menu, that means your administrator hasn't enabled it yet. Administrators can learn more here.

## 20.1 Getting Started




Use the  **button** in the top toolbar to see the published knowledge base.

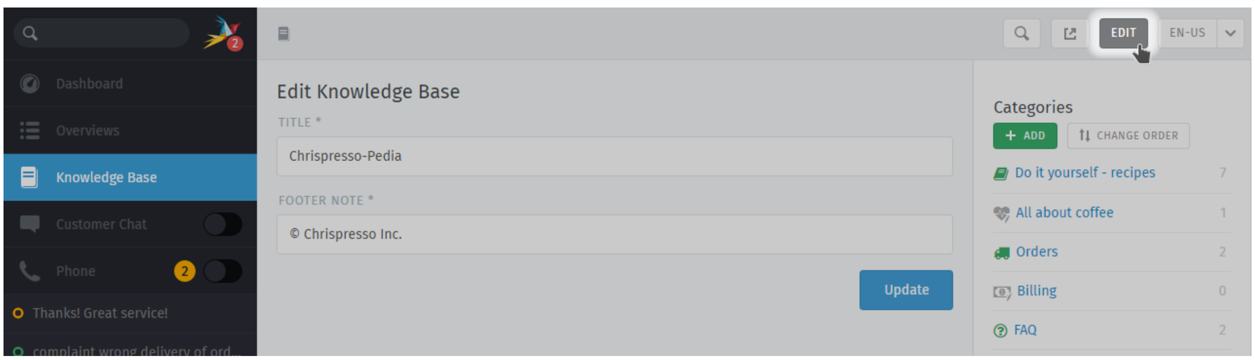



Fig. 2: In Edit Mode, use the righthand menu to navigate through the knowledge base.

Use the **"Edit" button** in the top toolbar to switch into **Edit Mode** (and back again).

**Note: Huh? I don't see an "Edit" button…**

By default, agents are **not permitted to create, edit, or manage knowledge base articles**. If you wish to edit the knowledge base, talk to your administrator about granting you the appropriate permissions.

### 20.1.1 Switching Languages

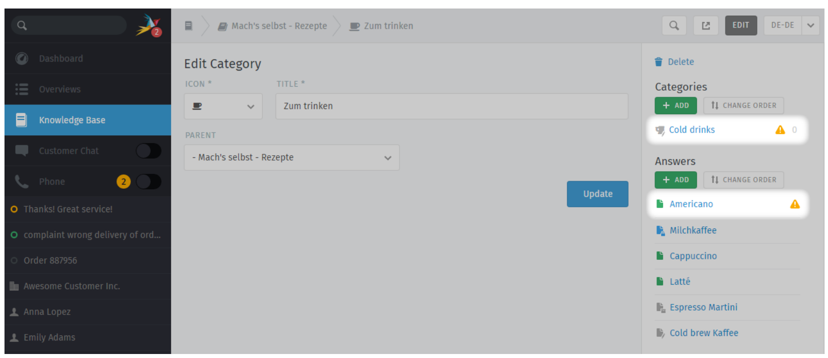
Use the language menu to view or edit translations of the current page.

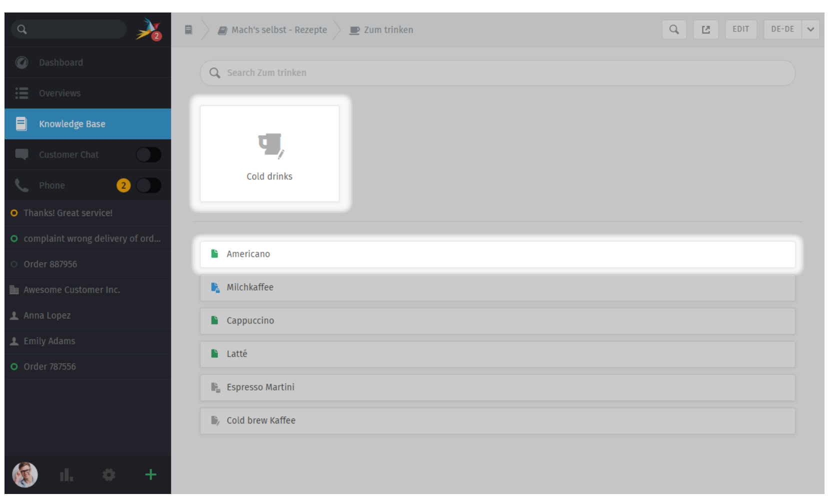
**Hint: What happens when a page hasn't been translated into the selected language yet?**

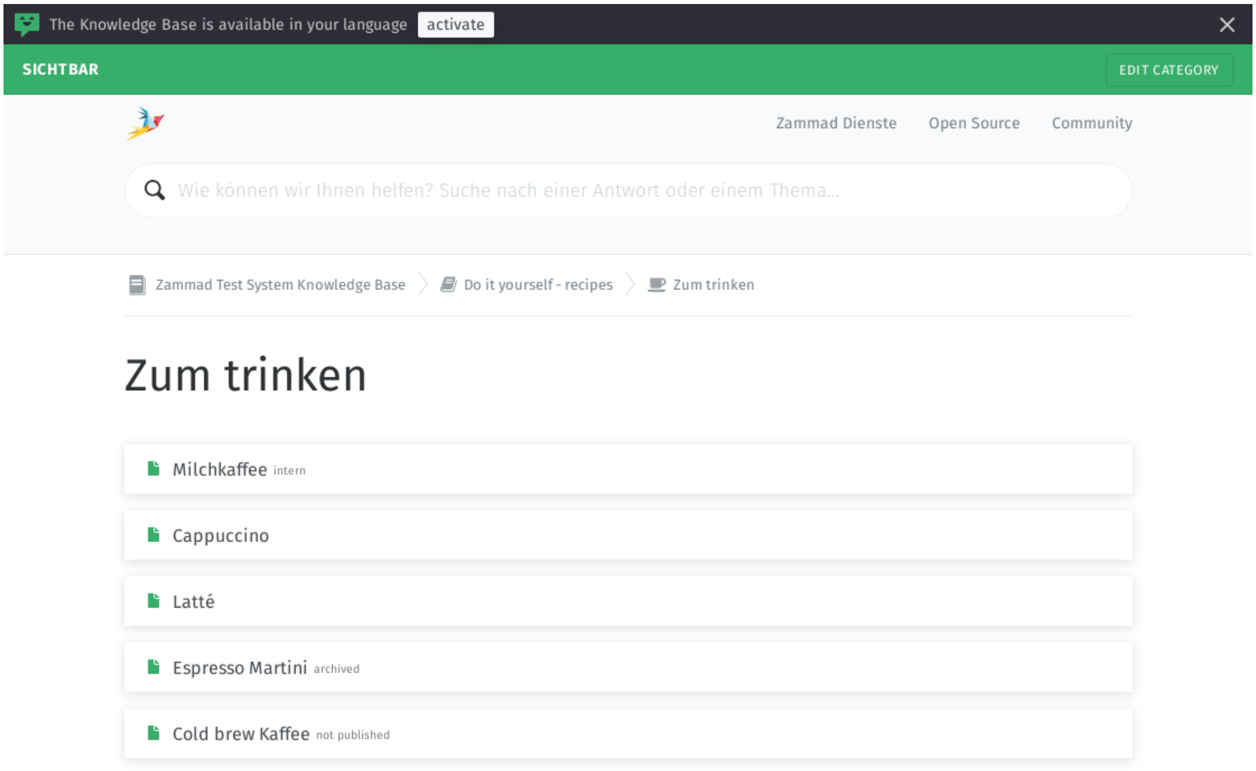
**in Edit Mode** Untranslated pages are marked with a **warning sign**:

**in Preview Mode** Untranslated pages are only visible to users with **edit permissions**:


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
Thanks! Great service!
complaint wrong delivery of ord...
EDIT
EN-US
English (United States)
Deutsch
Edit Knowledge Base
TITLE *
Chrispresso-Pedia
FOOTER NOTE *
© Chrispresso Inc.
Update
Categories
ADD
CHANGE ORDER
Do it yourself - recipes
All about coffee
Orders
Billing
FAQ
Other (en)

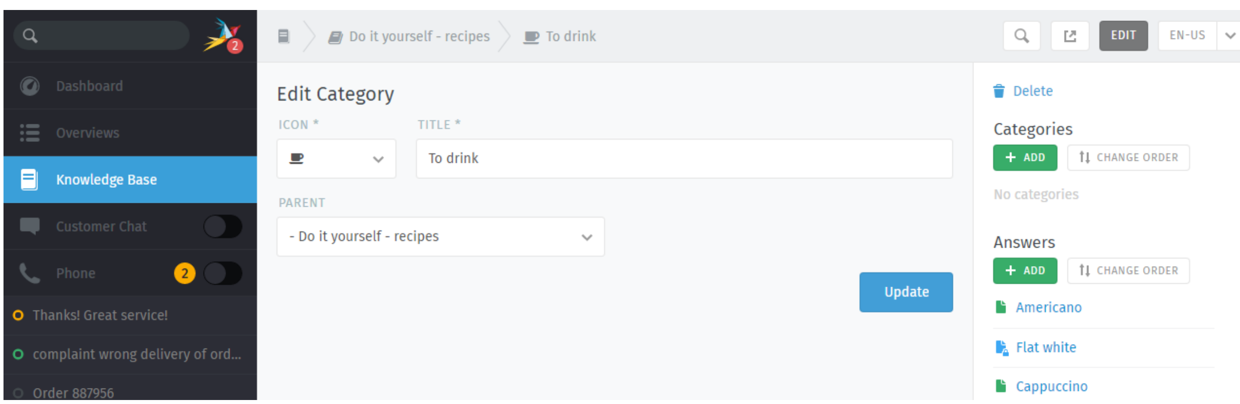

Mach's selbst - Rezepte
Zum trinken
EDIT
DE-DE
Edit Category
ICON *
TITLE *
Zum trinken
PARENT
- Mach's selbst - Rezepte
Update
Delete
Categories
Cold drinks
Answers
Americano
Milchkaffee
Cappuccino
Latte
Espresso Martini
Cold brew Kaffee


Mach's selbst - Rezepte
Zum trinken
Search Zum trinken
Cold drinks
Americano
Milchkaffee
Cappuccino
Latte
Espresso Martini
Cold brew Kaffee




**in the published knowledge base** Untranslated pages are **always hidden**:

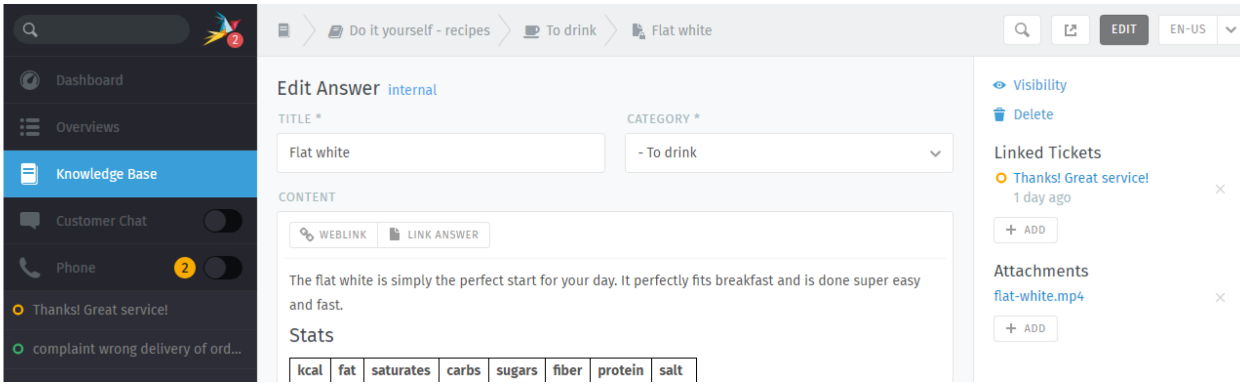
## 20.2 Editing Categories




**Hint:** If you relocate a category using the **Parent** menu, all of its articles and sub-categories will be relocated with it.

**Note:** Categories can only be deleted once **all of their articles and sub-categories** have been deleted or relocated.

## 20.3 Editing Answers




The knowledge base editor comes equipped with the same **rich text editing capabilities** available in the Zammad ticket composer. That means you can use the same *keyboard shortcuts* to insert formatted text, bullet lists, and more. You can even add file attachments and links!

**Tip: Why are there three kinds of links?**

**Weblink** URLs pointing to other websites.

**Link Answer**

Internal references to other knowledge base answers.
(Will not break if destination URL changes.)

**Linked Tickets**

Internal references to Zammad tickets.
(Visible only in Preview and Edit Modes.)

**Hint:** Set the **visibility** of an answer to control who can see an article, or schedule it to be published at a later date. Articles are **color-coded** according to their visibility:

| | |
|---|---|
| | **Public** (visible to everyone) |
| | **Internal** (visible to agents & editors only) |
| | **Draft/Scheduled/Archived** (visible to editors only) |

CHAPTER 21

# i-doit: Use Tickets to Track Company Property

With i-doit integration, you can list which pieces of your company's property are related to any given ticket. That includes both physical and digital infrastructure, from servers to meeting rooms to virtual machines to software licenses.

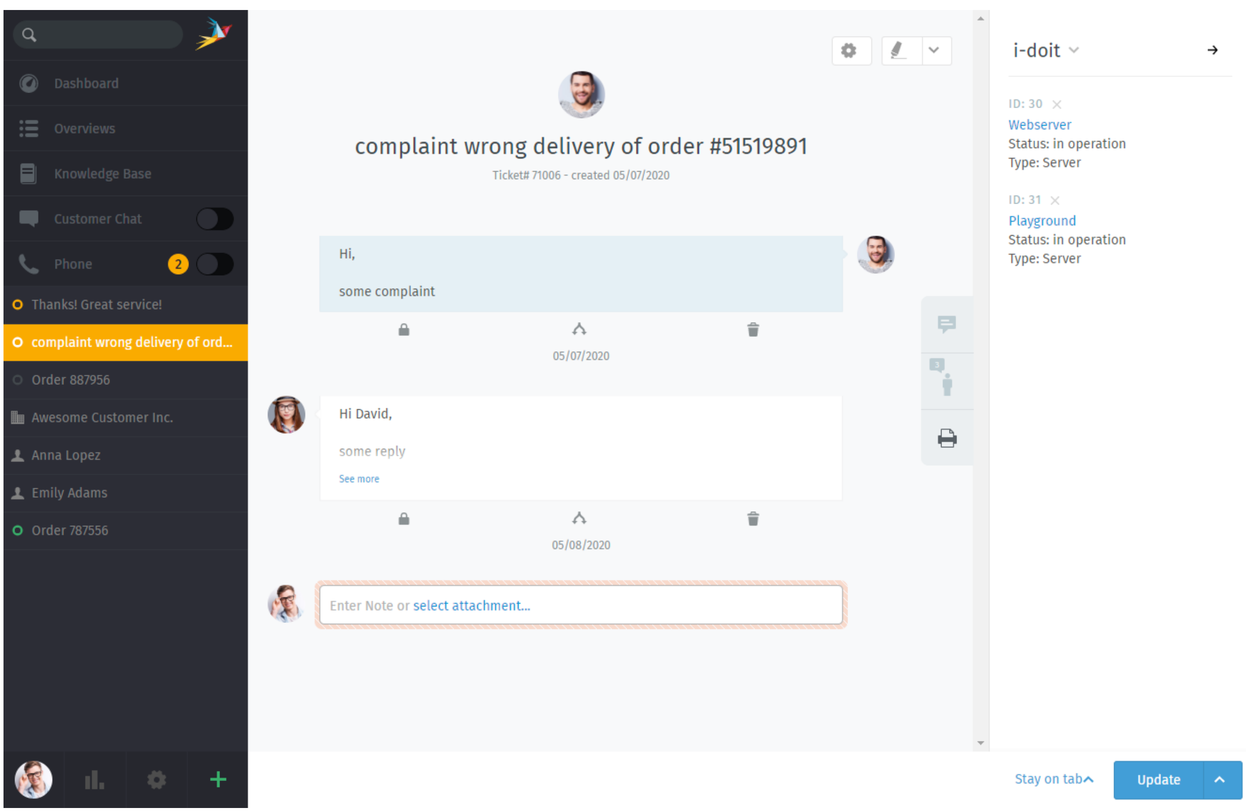



Fig. 1: Use the **printer** tab to view or manage a ticket's assets from i-doit.

**Note: Huh? I don't see a printer tab. . .**

This feature is **optional**; if you don't see it in the ticket view, that means your administrator hasn't enabled it yet. Administrators can learn more here.

## 21.1 Why?

i-doit can help you keep track of troublesome equipment and find previous tickets from the last time something went wrong with it.

It's also a great way to document quirks in the company's belongings: Why haven't we upgraded this system from Windows Vista yet? What did we decide to do about that faulty network switch? And why does the coffee maker keep shutting off before it's finished?

## 21.2 So How Does It Work?

**Hint: New to i-doit?**

Ask your administrator / IT personnel to give you a tour—otherwise, the directions below might not make much sense. (And if your organization isn't already using i-doit, this guide is not for you.)

### 21.2.1 In Zammad: Link i-doit assets to tickets

First, add i-doit assets to a ticket in the ticket pane:

Fig. 2: Select **> i-doit > Change Objects**, then filter by category and/or name.

Once assets have been linked to a ticket, they can be accessed directly from the ticket view:

Fig. 3: Click on a linked asset in the ticket pane to open its page in i-doit.

### 21.2.2 In i-doit: List & create tickets for a given asset

Your i-doit control panel should contain a list of all the tickets associated with each asset:

Fig. 4: Click the in the toolbar to list an asset's tickets. Use the **Open in ticketsystem** button to open the ticket in Zammad.

You can even launch Zammad's new ticket dialog directly from i-doit, with the asset already linked for you:

Fig. 5: Use the **Create ticket** button in the asset ticket list to start a new, pre-linked ticket dialog.