Zammad (for Agents)

The Zammad Foundation

Nov 22, 2022

BASICS

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CHAPTER

ONE

ZAMMAD GLOSSARY

Ever wondered what we mean by a specific term? We've been collecting the most relevant terms below for your insight.

Note: Due to translation alphabetical sorting may be off in non english versions of this page.

Quickly jump to… *A B C D E F G H I J K L M N O P Q R S T U V W X Y Z*

1.1 A

Admin An admin(istrator) is a user in Zammad who has special rights. Admins can configure user accesses, time recording settings, templates, and text modules and, on a higher level, integrations, reporting, etc. So if you're looking to make a change within your Zammad and you find that it doesn't work, find an admin in your organization and ask them – chances are, they can help.

Agent An agent is what we call a user in Zammad who processes tickets/inquiries. There are usually several or many agents who use Zammad regularly and sometimes even consider it their main tool. Some of them are admins, meaning that they can change settings, user rights, and so on (see above).

API An API (Application Programming Interface) is a connection that allows you to create or modify business objects. Zammad has a REST (Representational State Transfer) API that allows our users, among other things, to connect third-party systems to their instance (such as social media or messengers).

You can learn more on our API landing page.

Automation There are many processes that can be automated with Zammad. This means that certain steps or actions take place automatically, hence no further action is required from the agents. One example would be the weekly deletion of tickets at a pre-defined time.

Article Each correspondence within a ticket is called an article. Ticket articles can be internal (so only agents can see them) or public (e.g. emails to your customers, which they receive, too).

Autosave Autosave might be one of the coolest traits of Zammad: It saves all your work as you go along, so if you ever log out unexpectedly or your browser crashes (we've all been there…) none of your work gets lost!

You can learn more on our Autosave landing page.

1.2 B

Branding Every company has a different identity, and Zammad accommodates this in various ways, e.g. by letting you design your signatures freely and add your company logo to the platform.

Learn more about branding options in the admin documentation.

1.3 C

Custom Development (CD) We are constantly working on improving Zammad, and we keep adding new features with every single release. However, sometimes our customers might require a very specific new feature, addition, or adjustment that is either very urgent or very particular to their individual use case. This is when a custom development can take place: We offer the customer to develop the desired feature at a price that we agree upon previously (which is based on the expected hours needed for completion).

Changelog With every new release comes a new changelog. It is basically a list of all the things that have changed, from new enhancements to bug fixes.

You can find them all on our GitHub!

Customer A customer is a person that you communicate with from within Zammad. Every customer receives a profile page, which we call the Customer Information Page, and it shows all the tickets of this particular customer. Various customers can be assigned to the same organization. Each customer can access their individual Customer Interface, where they see all their tickets with the current status and live updates.

Core Workflows This feature allows every organization to configure their individual dynamic fields and ticket masks based on their specific workflows. This way, certain Groups will only (or always) see certain fields. You can even set up dependencies, as in, if one field is filled in, another one opens up or becomes mandatory.

Learn more about Core Workflows in the admin documentation.

CTI CTI stands for Computer Telephony Integration and allows you to collect detailed information on all your incoming and outgoing calls. This includes, for example, a call log, an overview of which agent is currently on a call, a caller ID search, and even a Do-Not-Disturb-Mode.

Learn more on our CTI landing page.

Here's the fitting documentation pages:

- generic CTI
- placetel CTI
- sipgate CTI

Checkmk Checkmk is a powerful IT monitoring tool that can send real-time status alerts to Zammad via email or REST API. Set these alerts up in Checkmk, and Zammad will automatically create, update, and close tickets based on the health of your system.

Learn more about checkmk integration in the admin documentation.

Clearbit Clearbit is a marketing data engine designed to collect information on your contacts. Thus, new queries from unknown users in Zammad can be automatically enriched with information such as company, number of employees, annual turnover, industry, and much more.

Learn more about clearbit integration in the admin documentation.

Conflict Warning When two agents edit the same ticket at the same time, a lot can go wrong - from duplicate replies to overwritten messages. Zammad helps you to avoid this with its integrated conflict warning. So if you see another agents avatar and a little pen at the bottom of your ticket, it means they are currently editing it.

Learn more on our following up page.

1.4 D

Dashboard The dashboard is every agent's individual Welcome Page in Zammad and gives you feedback on your situation by collecting information and statistics about your work. Here you can find all sorts of overviews, such as the open tickets, the average waiting time, or the reopening rate. You can also see what your colleagues are doing by checking the Activity Stream.

Learn more on *Checking Your Stats*.

Documentation If this Glossary isn't enough already (just kidding, it won't be), our Documentation is the place to head to for all information on Zammad, especially when it comes to the more technical aspects, such as settings or installations.

We have three different ones: Zammad for Agents, Zammad for Admins, and the general Zammad Documentation (System Administrators, API).

1.5 E

Escalation An escalation is what happens after the deadline for a ticket has passed and, for example, no update to the customer has been created. The ticket is marked in red in your taskbar and the overviews and everyone else who is involved in its process gets very sad. So don't let tickets escalate! Also, in order to prevent escalations, you can use our SLAs (see *SLAs*).

External Authentication External authentication is an easy, one-click option for your users to log into Zammad. It has various benefits: not only is it faster but it also means that your users will have to remember fewer passwords. Zammad currently supports more than ten login providers, such as Facebook, GitHub, GitLab, Google, or Microsoft / Office365.

See our admin documentation for all third party authenticators.

Exchange Integration The Exchange integration allows users to sync their contacts from their Exchange address book with Zammad. This way, every time a contact is updated in Exchange, the iteration will be reflected in Zammad, giving you direct access to all your Exchange contacts from within your helpdesk.

Learn more about the exchange integration in our admin documentation.

Elasticsearch Zammad offers an Elasticsearch integration (a free and open search engine) that makes the search process within Zammad super fast (even for data sets of several terra bytes!).

Spoiler: Zammad is currently the only helpdesk system with a search function that combs attachments, too!

Note: This affects hosted environments only!

Via a read-only user in Elasticsearch, you can also integrate your favorite reporting tool (e.g. like Grafana).

1.6 F

Feature A feature is what we call the different functionalities of Zammad, such as our integrations, productivity tools, or time-saving aspects. We keep adding new features with every release.

Feature request Users can let us know if they are missing a particular feature in Zammad. We collect all of their wishes in our Community in the Feature Request category. If a request comes in regularly and we feel that it would be a great addition, we'll put it on our roadmap and start working on it.

Feature sponsoring If an organization urgently requires one of the features on the list, they can fast-forward the development and put it on top of the list by sponsoring it, which means that they cover the costs for the development.

1.7 G

Groups Groups are a synonym for departments or processing groups. The incoming tickets are assigned to them. The corresponding group is responsible for the processing. Within the group, an owner can be defined, who is then responsible for this ticket. Access rights to tickets are also controlled via the groups. The possible permissions are "full access", "read-only" and "no access".

If you have worked with the OTRS system in the past, you might remember the principle of "queues". The groups in Zammad are the same as the queues in OTRS.

Learn more on our group landing page.

Grafana Grafana is an open-source reporting tool. Zammad users on the Plus plan can integrate it into their instance and receive detailed analytics on their performance.

Hint: Self Hosted users

Hooking up Grafana to Elasticsearch is an possibility you can do on your own as well.

Learn more on how to add Grafana dashboards for Zammad on our documentation.

GitHub GitHub is a service for the version management of software development projects. It uses Git, a software that tracks changes in file sets. Here at Zammad, we use it to maintain our repository.

As Zammad in an open-source project, many developers and tech-lovers from all over the world contribute to it. GitHub is where we coordinate all of this.

You can find the repository here.

Besides our own repo, Zammad also has an integration for GitHub. It creates a data exchange that shows you all relevant information about your issues directly in the helpdesk, such as status or assignees.

Administrators can learn more about GitHub in the admin documentation, if you're an agent you can learn more about the functionality on this page: *GitHub / GitLab Integration*.

GitLab GitLab is similar to GitHub. Here at Zammad, we use it for our internal development.

There is also an integration that allows users to connect GitLab to Zammad so that all their issues and their corresponding changes are reflected in both systems.

Administrators can learn more about GitLab in the admin documentation, if you're an agent you can learn more about the functionality on this page: *GitHub / GitLab Integration*.

1.8 H

```
Wow...             |\__/,|   (`\
such emptiness   _.|o o  |_   ) )
             ---(((---(((---------
```

1.9 I

i-doit i-doit is a CMDB (Configuration Management Data Base). It helps you to keep an eye on every piece of the physical and digital infrastructure. A corresponding integration makes it possible to connect it to Zammad, where it adds a new tab to Zammad's ticket sidebar so you can link to existing i-doit objects for easy reference. It also allows you to create Zammad tickets in i-doit.

Administrators can learn more about i-doit in the admin documentation, if you're an agent you can learn more about the functionality on this page: *i-doit: Use Tickets to Track Company Property*.

Icinga Icinga is a monitoring system that supervises the availability of an organization's entire system infrastructure. It can be integrated into Zammad so that it triggers a ticket in case of a warning situation.

Learn more about Icinga on our landing page.

Issue-tracking system Issue trackers are usually systems that track processes on a technical level. Two of the best-known examples are GitHub and GitLab.

Zammad is also often referred to as an issue-tracking system. However, as a helpdesk, it focuses on communication at the customer level rather than the technical level.

1.10 J

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```

1.11 K

Knowledge Base Think of a very extensive set of FAQs – that's exactly what the Zammad knowledge base is. It collects all important information: definitions, processes, how-to's, organigrams, etc.

Knowledge base articles can be either internal or external, so you can either show them to the world (good for information on your product or service, for example) or keep them for your team (e.g. for internal processes or team info).

Administrators can learn more about the Knowledge Base in the admin documentation, if you're an agent you can learn more about the functionality on this page: *Knowledge Base*.

Kibana Kibana is a browser-based, open-source reporting tool that focuses on data evaluation. It was developed by Elastic, which is why it is not a surprise that it uses data from Elasticsearch for its analytics.

Kibana can be integrated with Zammad, allowing for helpdesk data to be mapped in the reporting tool.

Hint: This does not apply to SaaS Zammad instances.

Learn more about Kibana on our landing page.

1.12 L

LDAP A Lightweight Directory Access Protocol (LDAP) helps provide information about your users within Zammad. Authentication of users against the LDAP and LDAP role mapping to Zammad roles are also possible.

Learn more about LDAP integration in the admin documentation.

1.13 M

Macro A macro is a series of actions. By starting the macro, the actions are also triggered (like a domino effect), so users don't have to work through each individual step separately. It saves an enormous amount of time and ensures that no step is forgotten.

An example of this is declaring a ticket as "spam". The manual way here would be to assign an owner, set a status, and add the tag "spam". Using a macro, all this can be done in just one action. Macros can be used in the ticket zoom or within an overview (using multiple selection).

Administrators can learn more about Macros in the admin documentation, if you're an agent you can learn more about the functionality on this page: *Macros*.

Migrator / Migration Wizard If a company wants to switch from another helpdesk software to Zammad, they often have one concern: What about their existing data? That's why we have built our migration wizards that help with migrating all data at the touch of a button.

Monit Monit is an open-source monitoring tool that relies on a simple setup and a strong community. You can integrate it with Zammad – this way, a ticket is created every time you receive an email in Monit.

Learn more about Monit on our landing page.

Mentions Mentions are a Zammad feature that allows you to tag another agent in a ticket. Just type `@@` and the name. The selected person will be notified and will be watching the ticket from now on.

Learn more on this page: *@mentions & the Subscribe Button*.

1.14 N

Nagios Nagios is another monitoring tool that alerts IT teams when, for example, a server is no longer accessible or a hard disk is about to be exhausted. Nagios can be integrated with Zammad so that a ticket is created in case of an alert.

Learn more about Nagios on our landing page.

1.15 O

Owner The owner of a ticket is the person responsible for it and ensures that it is processed in the best possible way. Of course, ownership can be transferred to another agent. In this case, it is recommended to leave a handover note on the ticket so that the new owner knows what is expected of them.

Learn more about ticket owners on this page: *Ticket Settings*

Organization An organization identifies a grouping of customers that operate under the same roof or within the same customer group. If a customer whose organization is "sharing" logs in to the customer interface, this user has access to all tickets of his organization.

1.16 P

Parent/Child Relationship If one ticket results in other subtasks (or additional correspondences), you can split it into several tickets. The main one will then be the parent ticket and the tickets with related subtopics are children. By the way: in the same way, you can also merge two tickets into one.

Learn more about this function on this page: *Linking Tickets*.

Placetel Placetel is a Cloud Telephone System that allows users to make phone calls via VoIP. Use your regular phone number and call someone directly on their mobile or landline while still having all communication in one place (aka Zammad).

Integrating a Placetel account with Zammad provides users with a call log, making the history of their correspondences even more accurate. Callers are identified directly by their caller ID - a key function that saves agents a lot of time when assigning callers.

Administrators can learn more on the *placetel CTI* integration page. Agents can learn more about this function on this page: *Caller Log*

Priority Every ticket gets assigned a priority. By default, the priority is 2 (normal). But it can be changed to either 1 (low) or 3 (high).

1.17 Q

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such emptiness   _.|o o  |_   ) )
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```

1.18 R

Role Everyone who logs into Zammad has a predefined role. There are three types: admin, agent, and customer.

Admins have the most rights: they can define roles, permissions, and settings for the entire team and instance.

Agents can view and edit tickets, but not change any settings other than those of their own profiles.

Customers can view their tickets' processing status in their individual Customer Interface.

Release Every few months, we bring a new version of Zammad into the world, which is called a release. It all started with Zammad 1.0.

Every release adds new features to our software. There are major and minor releases: major releases (such as Zammad 1.0, 2.0, etc.) bring major changes. Minor releases are installed on top of them (such as 1.1, 2.1, etc.) and bring smaller updates.

1.19 S

SSO Single-sign-on (SSO) allows you to access all your systems and devices with just one login. There are various providers that make this process easy and secure. Zammad currently supports SSO via SAML and Shibboleth.

Hint: Self Hosted users can also use Kerberos authentication.

You can learn more about SSO on our landing page.

S/MIME S/MIME is the most widely-supported method for secure email communication. By activating it in Zammad, all messages sent from Zammad will be signed and encrypted.

Administrators can learn more about S/MIME in the admin documentation, if you're an agent you can learn more about the functionality on this page: *Secure Email*.

Sipgate Sipgate is a SaaS solution for internet telephony. The Zammad integration for Sipgate provides users with a detailed call overview. If you have a customer that wants to get connected to a certain agent, the caller log will tell you if this colleague is currently available.

Administrators can learn more on the *sipgate CTI* integration page. Agents can learn more about this function on this page: *Caller Log*

SLA A Service Level Agreement (SLA) is a contract between an end-user and a company that defines the minimum expected service requirements including quality, availability, and punctuality. They are used to set expectations and hold companies accountable for keeping their promises.

You can easily set up SLAs in Zammad and define parameters such as the time for the first response, an update, and a solution. Once the deadline has been reached, the ticket will escalate.

Learn more about SLAs on our landing page.

Status Every ticket has a status. You can change it once you've updated the ticket. There are four types of status, and they are all color-coded.

Learn more about states and they color coding on this page: *State*

1.20 T

Text module If you find that you send the same answers / text bits over and over again, you can save yourself a bunch of work and create a text module. This way, you just need to type `::` shortcut and the pre-defined paragraph will automatically appear in your article.

For example, here at Zammad, we have a text module with the shortcut `::ilff`, which turns into `I look forward to your feedback`.

Administrators can learn more about text modules here. Agents can learn more about this function on this page: *Working with Text Modules*

(Ticket) Template If you create many similar tickets or write many similar texts, you can create a template for them. This is helpful for introductions to your product/service or for drawing up an offer. It's a real time-saver!

You can learn more on this page: *Ticket Templates*.

Tags Tags help you to categorize tickets. You can define them based on your use case. For example, if you're a retail business, your tags could be based on your product categories to help you organize tickets by the type of product they refer to. But they could also be based on the type of request, e.g. refund, delivery issue, missing…

Administrators can learn more about tags here. Agents can learn more about this function on this page: *Tags*

1.21 U

User A user is any user of the ticket system. Each user is assigned certain permissions, which allow them to access certain areas and information. Users can have various roles, with the standard options being agent, admin, and customer.

1.22 V

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such emptiness   _.|o o  |_   ) )
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1.23 W

Webhooks In a nutshell, webhooks are an easy way for systems to communicate with each other and allow you to send real-time data to any other application. We use them to allow our users to inform a third-party system about new information in Zammad.

Learn more about webhooks on this page.

1.24 X

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1.25 Y

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```

1.26 Z

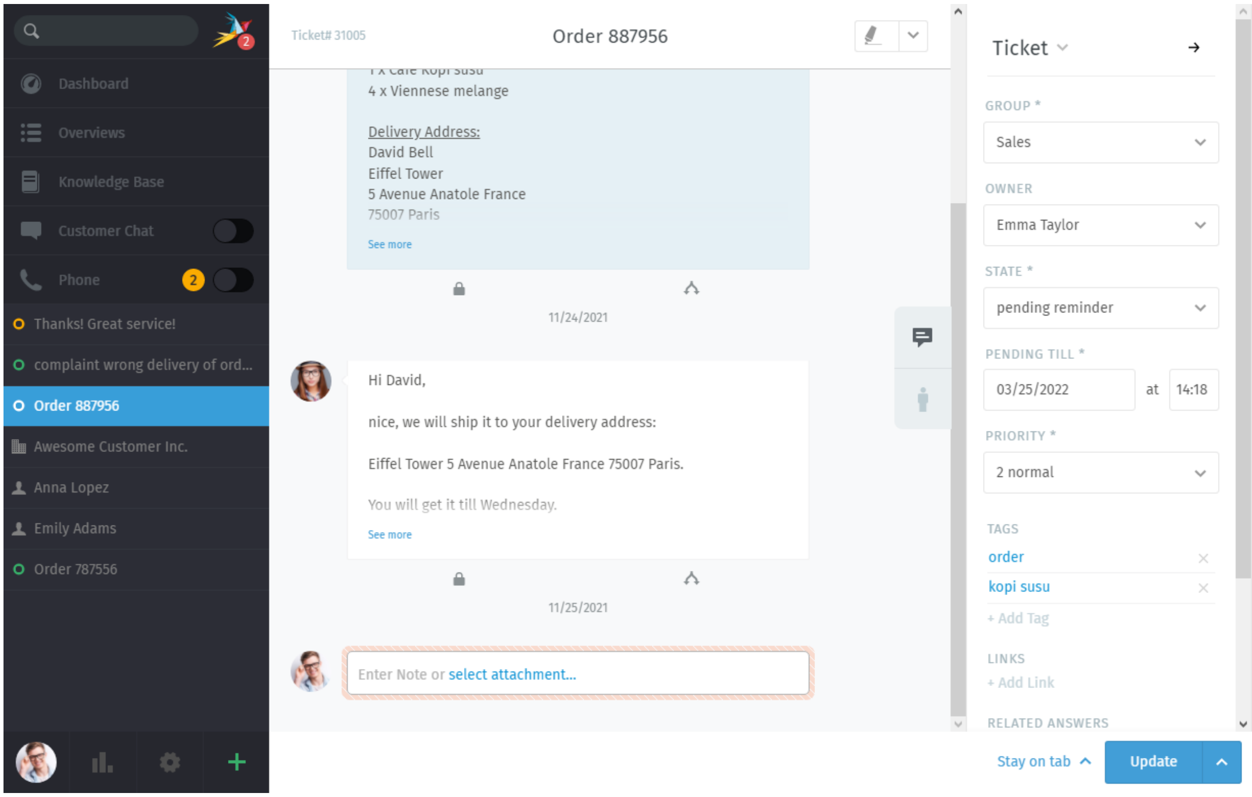
Zammad Zammad is the greatest helpdesk in the world. Period.

CHAPTER
TWO

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**.



Ticket# 31005
Order 887956

4 x Viennese melange

Delivery Address:
David Bell
Eiffel Tower
5 Avenue Anatole France
75007 Paris

See more

11/24/2021

Hi David,

nice, we will ship it to your delivery address:

Eiffel Tower 5 Avenue Anatole France 75007 Paris.

You will get it till Wednesday.

See more

11/25/2021

Enter Note or select attachment...

GROUP * Sales
OWNER Emma Taylor
STATE * pending reminder
PENDING TILL * 03/25/2022 at 14:18
PRIORITY * 2 normal
TAGS order, kopi susu

Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
Ticket
+ Add Tag
LINKS
+ Add Link
RELATED ANSWERS
Stay on tab
Update

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.

2.1 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

THREE

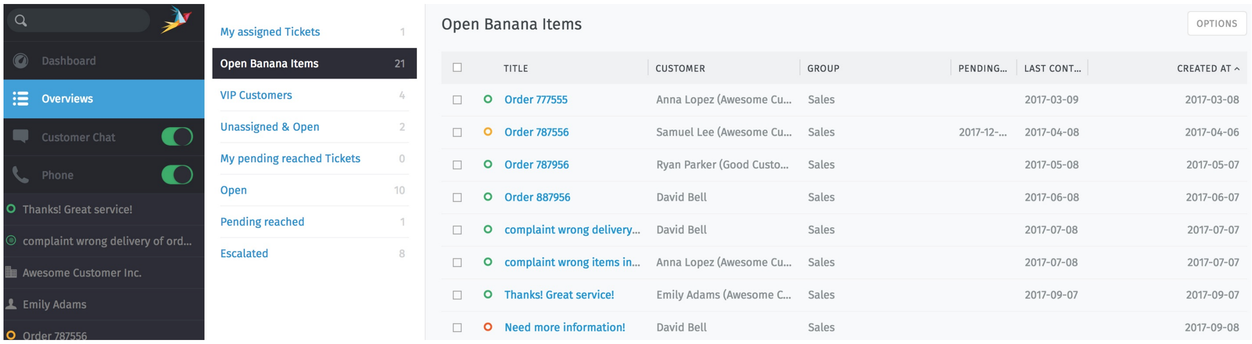
FINDING TICKETS

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.

3.1 Browse for Tickets

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


Dashboard
Overviews
Customer Chat
Phone
Thanks! Great service!
complaint wrong delivery of ord...
Awesome Customer Inc.
Emily Adams
Order 787556
Open Banana Items
OPTIONS

My assigned Tickets	1
Open Banana Items	21
VIP Customers	4
Unassigned & Open	2
My pending reached Tickets	0
Open	10
Pending reached	1
Escalated	8

☐		TITLE	CUSTOMER	GROUP	PENDING...	LAST CONT...	CREATED AT ⌃
☐	○	Order 777555	Anna Lopez (Awesome Cu...	Sales		2017-03-09	2017-03-08
☐	○	Order 787556	Samuel Lee (Awesome Cu...	Sales	2017-12-...	2017-04-08	2017-04-06
☐	○	Order 787956	Ryan Parker (Good Custo...	Sales		2017-05-08	2017-05-07
☐	○	Order 887956	David Bell	Sales		2017-06-08	2017-06-07
☐	○	complaint wrong delivery...	David Bell	Sales		2017-07-08	2017-07-07
☐	○	complaint wrong items in...	Anna Lopez (Awesome Cu...	Sales		2017-07-08	2017-07-07
☐	○	Thanks! Great service!	Emily Adams (Awesome C...	Sales		2017-09-07	2017-09-07
☐	○	Need more information!	David Bell	Sales			2017-09-08

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)

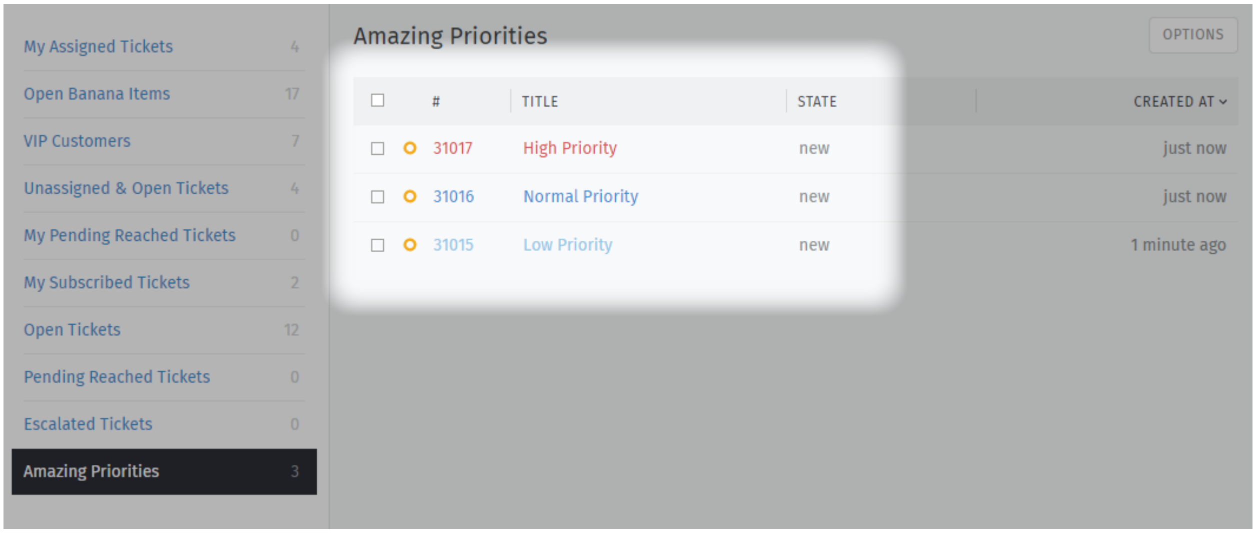
Tip: UI Protip

- 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.)

- *Ticket priorities* are **color-coded:**


My Assigned Tickets 4
Open Banana Items 17
VIP Customers 7
Unassigned & Open Tickets 4
My Pending Reached Tickets 0
My Subscribed Tickets 2
Open Tickets 12
Pending Reached Tickets 0
Escalated Tickets 0
Amazing Priorities 3
Amazing Priorities
OPTIONS

☐		#	TITLE	STATE	CREATED AT ⌄
☐	○	31017	High Priority	new	just now
☐	○	31016	Normal Priority	new	just now
☐	○	31015	Low Priority	new	1 minute ago

Fig. 2: Zammad's 3 default priorities allow you to see the importance of your tickets better.

3.2 Search for Tickets

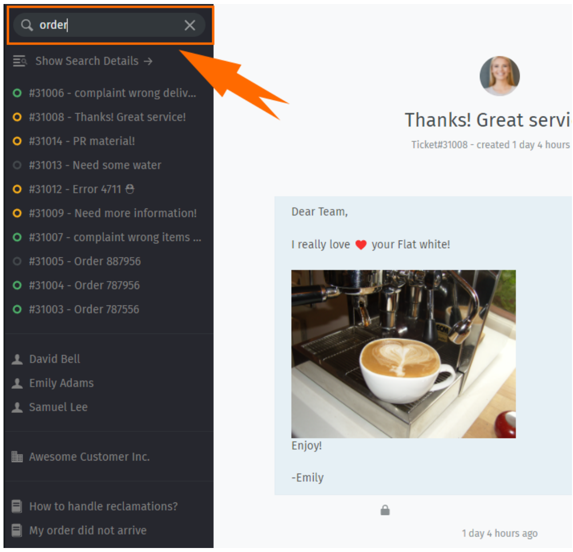
Looking for an archived ticket? Use the **search bar**.

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.



○ #31006 - complaint wrong deliv...
○ #31008 - Thanks! Great service!
○ #31014 - PR material!
○ #31013 - Need some water
○ #31012 - Error 4711
○ #31009 - Need more information!
○ #31007 - complaint wrong items ...
○ #31005 - Order 887956
○ #31004 - Order 787956
○ #31003 - Order 787556

David Bell
Emily Adams
Samuel Lee

Awesome Customer Inc.

How to handle reclamations?
My order did not arrive

Thanks! Great servi
Ticket#31008 - created 1 day 4 hours

Dear Team,

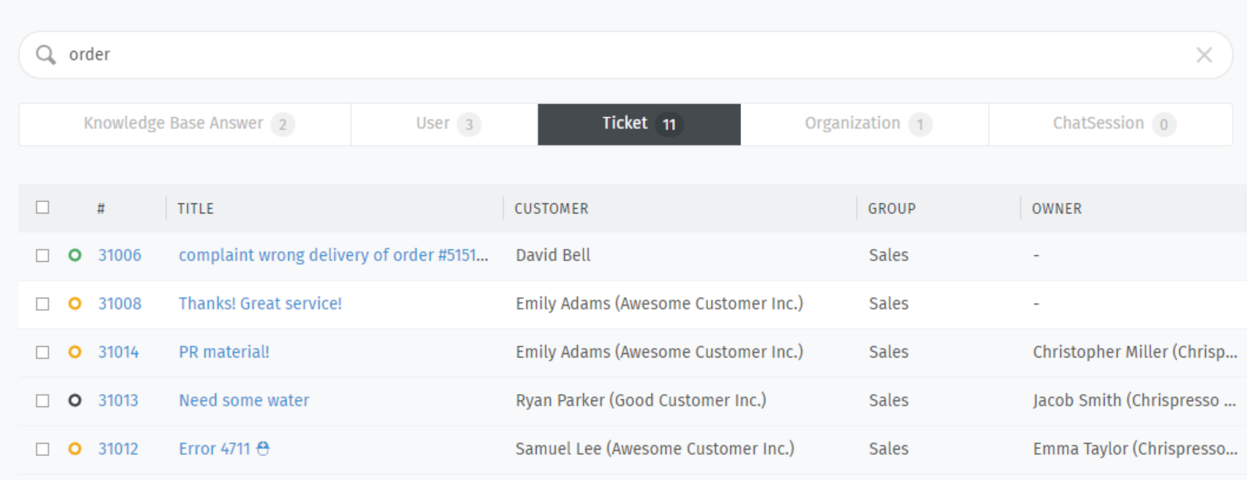
I really love ❤ your Flat white!

Enjoy!

-Emily

1 day 4 hours ago

Fig. 3: Results appear immediately under the search bar as you type.



☐		#	TITLE	CUSTOMER	GROUP	OWNER
☐	○	31006	complaint wrong delivery of order #5151...	David Bell	Sales	-
☐	○	31008	Thanks! Great service!	Emily Adams (Awesome Customer Inc.)	Sales	-
☐	○	31014	PR material!	Emily Adams (Awesome Customer Inc.)	Sales	Christopher Miller (Chrisp...
☐	○	31013	Need some water	Ryan Parker (Good Customer Inc.)	Sales	Jacob Smith (Chrispresso ...
☐	○	31012	Error 4711	Samuel Lee (Awesome Customer Inc.)	Sales	Emma Taylor (Chrispresso...

Fig. 4: For detailed results, click the **Show Search Details** → link just above the autocomplete list.

Tip: UI Protip

Click on column headings to change the display order.

CHAPTER FOUR

SERVICING TICKETS

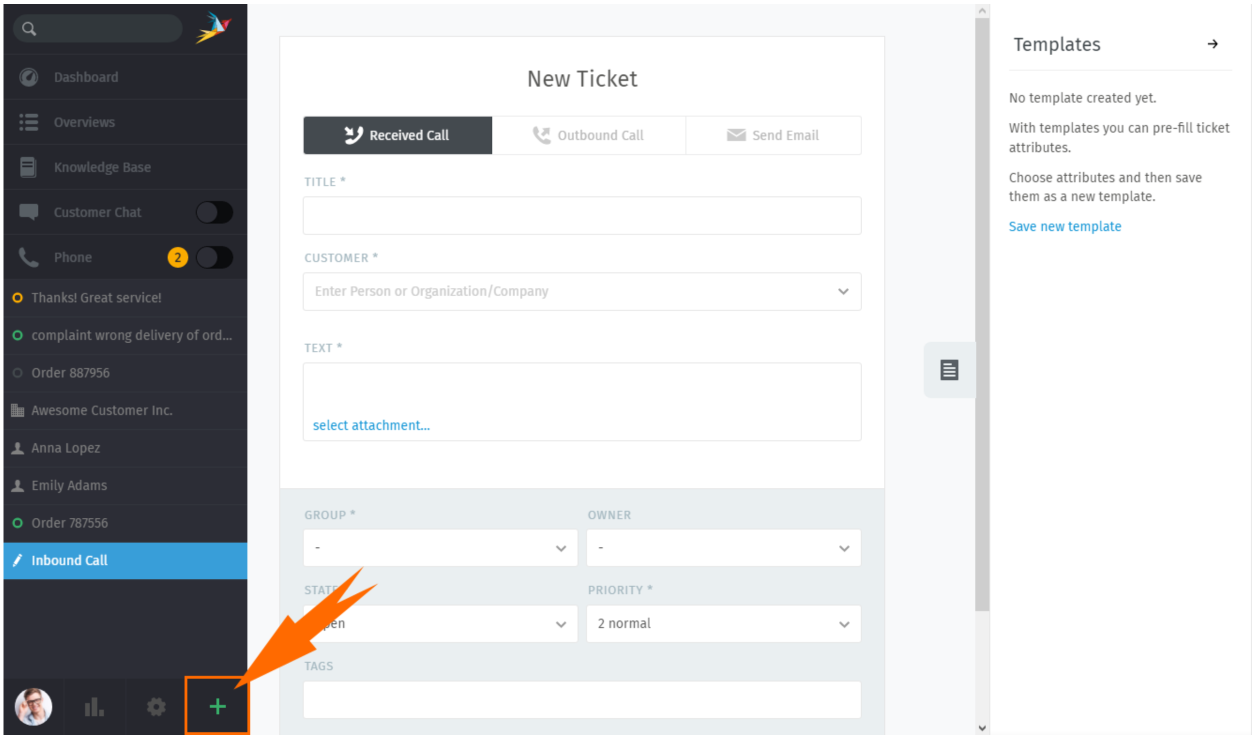
This is where you'll spend the vast majority of your time in Zammad.

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

4.1 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**.


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
Inbound Call
New Ticket
Received Call
Outbound Call
Send Email
TITLE *
CUSTOMER *
Enter Person or Organization/Company
TEXT *
select attachment...
GROUP *
OWNER
-
-
STATE *
open
PRIORITY *
2 normal
TAGS
Templates
Save new template

No template created yet.

With templates you can pre-fill ticket attributes.

Choose attributes and then save them as a new template.

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

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.

4.1.1 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.

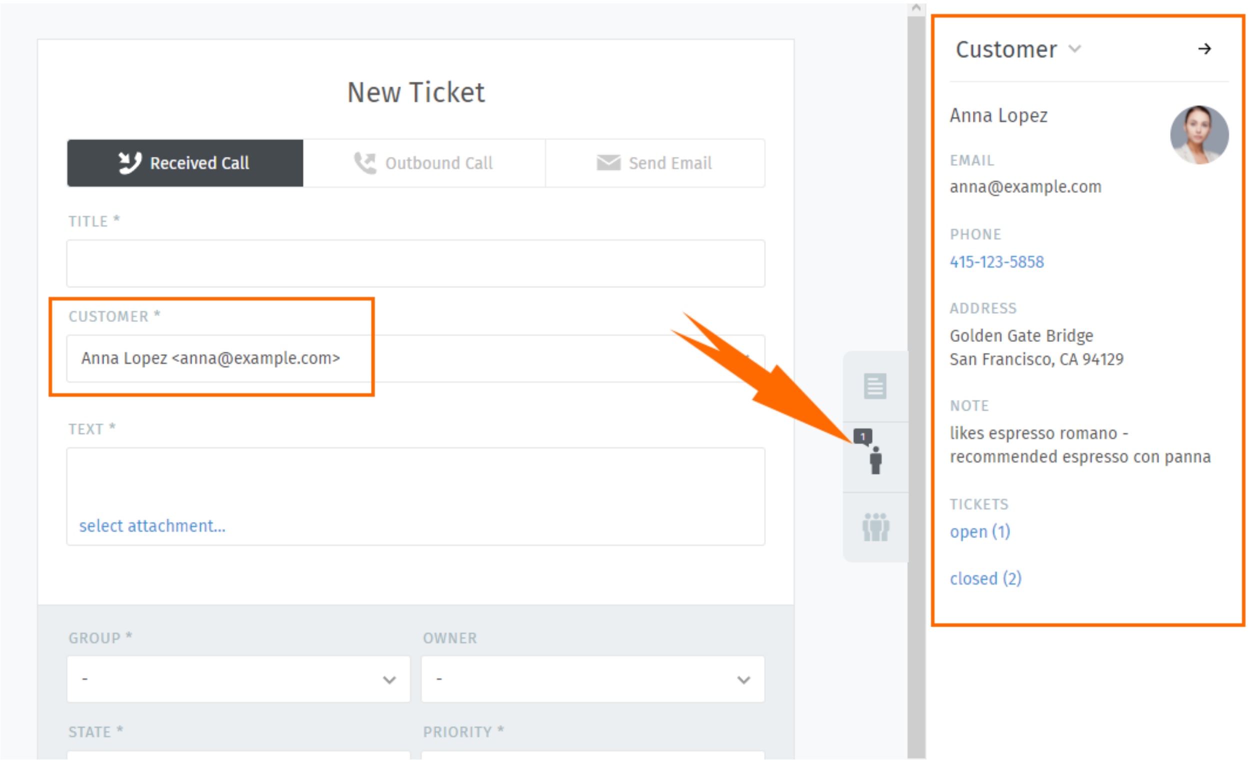
Customer When entering a customer, the autocomplete menu searches for **email addresses only**. You **must** select an option from the autocomplete menu, or else create a new customer.

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

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

Tip: UI Protip

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



CUSTOMER * Anna Lopez <anna@example.com>

GROUP * -

OWNER -

Anna Lopez

EMAIL
anna@example.com

PHONE
415-123-5858

ADDRESS
Golden Gate Bridge
San Francisco, CA 94129

NOTE
likes espresso romano - recommended espresso con panna

TICKETS
open (1)
closed (2)

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*

4.2 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").

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.

4.2.1 Responding to Individual Messages

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

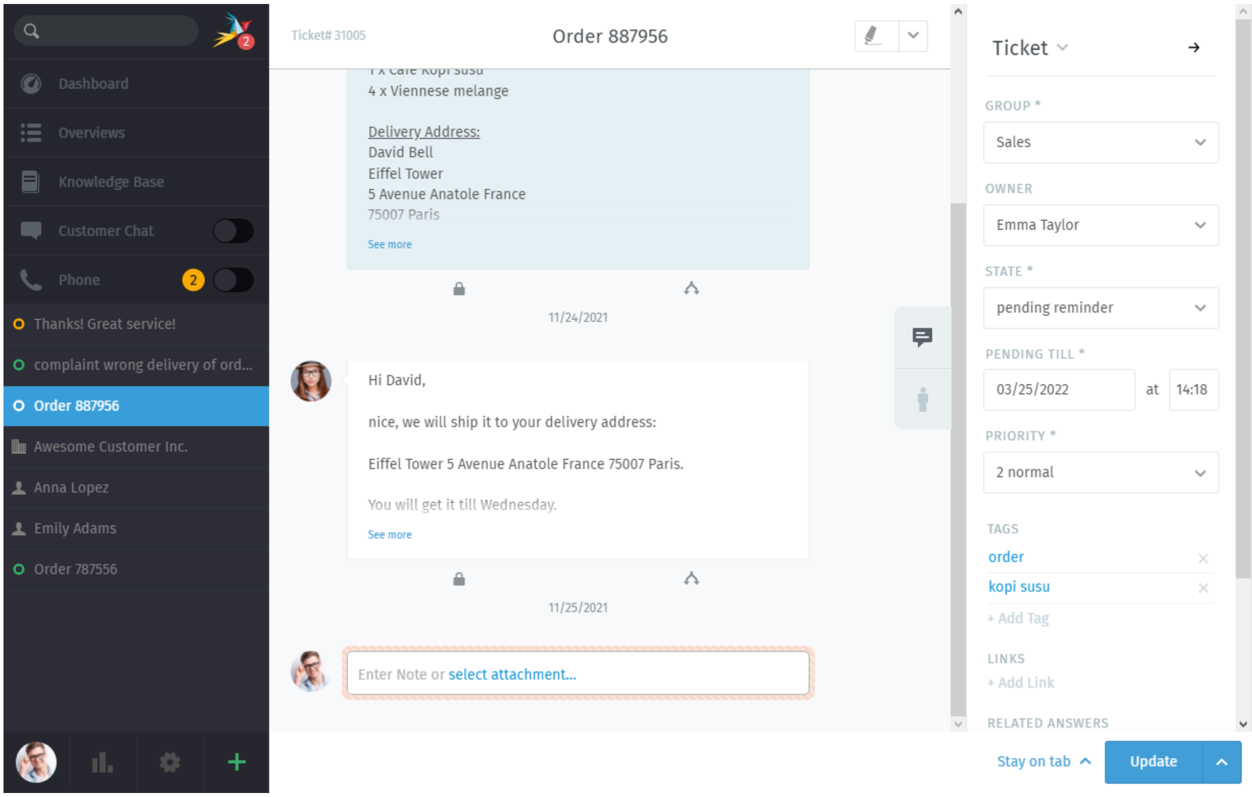
Like with new messages, your response will appear at the end of the thread. Under the hood, responses are sent **via the same channel as the original message** (*i.e.,* if the message you replied to was originally a tweet, the customer will receive your response in a Twitter DM).

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.


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
Ticket# 31005
Order 887956
See more
11/24/2021
See more
11/25/2021
Enter Note or select attachment...
Ticket
Stay on tab
Update

1 x Cafe Kopi susu
4 x Viennese melange

Delivery Address:
David Bell
Eiffel Tower
5 Avenue Anatole France
75007 Paris

Hi David,

nice, we will ship it to your delivery address:

Eiffel Tower 5 Avenue Anatole France 75007 Paris.

You will get it till Wednesday.

GROUP * Sales

OWNER Emma Taylor

STATE * pending reminder

PENDING TILL * 03/25/2022 at 14:18

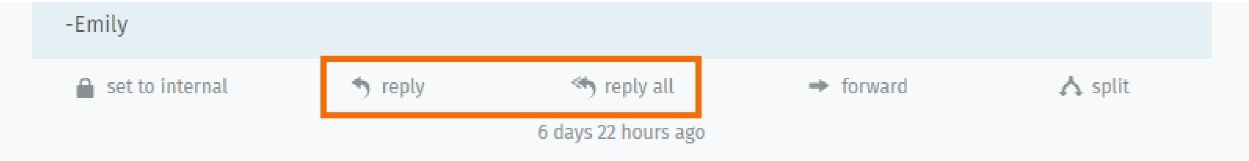
PRIORITY * 2 normal

TAGS
order
kopi susu
+ Add Tag

LINKS
+ Add Link

RELATED ANSWERS

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.


-Emily

set to internal
reply
reply all
forward
split
6 days 22 hours ago

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

4.2.2 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.

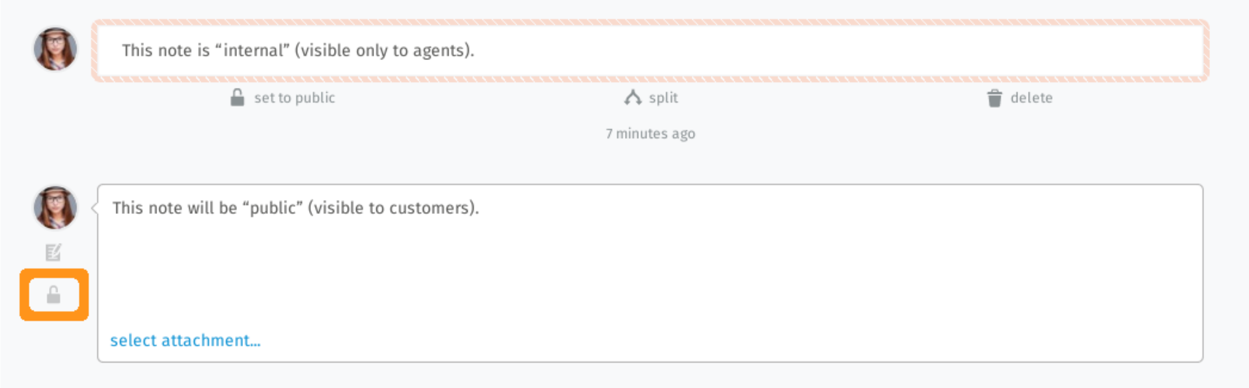
There are three types of follow-ups:

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.



This note is “internal” (visible only to agents).

This note will be “public” (visible to customers).

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.

4.2.3 Using quotation

In many cases you’ll want to quote earlier text of your customer. This is important because especially on long conversations your opponent will easily loose track.

Referencing on earlier written text helps greatly to keep context and track of things. By default Zammad adds no whole quote body (this can be changed by your administrator).

No matter if the whole quotation is active or not, you can always mark the text you want to reference and press *reply* or *reply all* after. This will cause Zammad to add the marked text as quote to the editor. You can break up quotations by using enter.

Note: This function is limited to one article per operation. The article has to be of type *communication* (thus have a *reply* button) to function.

Fig. 7: Mark, press reply and work with quoted text!

4.2.4 Keeping an eye on escalations

Note: Huh? I can't see escalation timestamps!

SLAs are optional and require configuration by your instance administrator. Administrators can learn more about SLAs in our admin documentation.

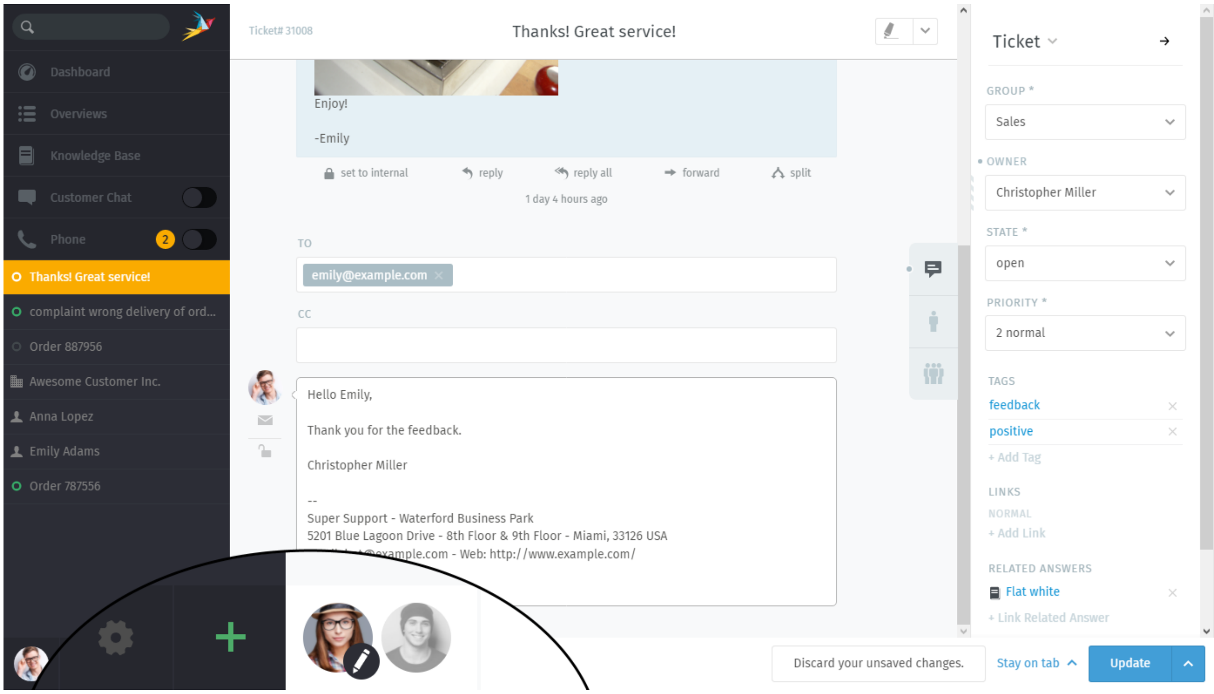
On the top of every ticket being applicable for SLA escalations, you'll find two dates next to the ticket number. By hovering the escalation date, Zammad will display all upcoming escalation times based on the SLA configuration.

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.


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
Ticket# 31008
set to internal
reply
reply all
forward
split
1 day 4 hours ago
Ticket
+ Add Tag
LINKS
NORMAL
+ Add Link
RELATED ANSWERS
Flat white
+ Link Related Answer
Discard your unsaved changes.
Stay on tab
Update

Thanks! Great service!

Enjoy!

-Emily

TO: emily@example.com

CC

Hello Emily,

Thank you for the feedback.

Christopher Miller

--
Super Support - Waterford Business Park
5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA
@example.com - Web: http://www.example.com/

GROUP *: Sales

OWNER: Christopher Miller

STATE *: open

PRIORITY *: 2 normal

TAGS: feedback, positive

Fig. 8: A icon will appear if the agent has made any unsaved changes to the ticket.

4.3 Ticket Settings

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

4.3.1 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.

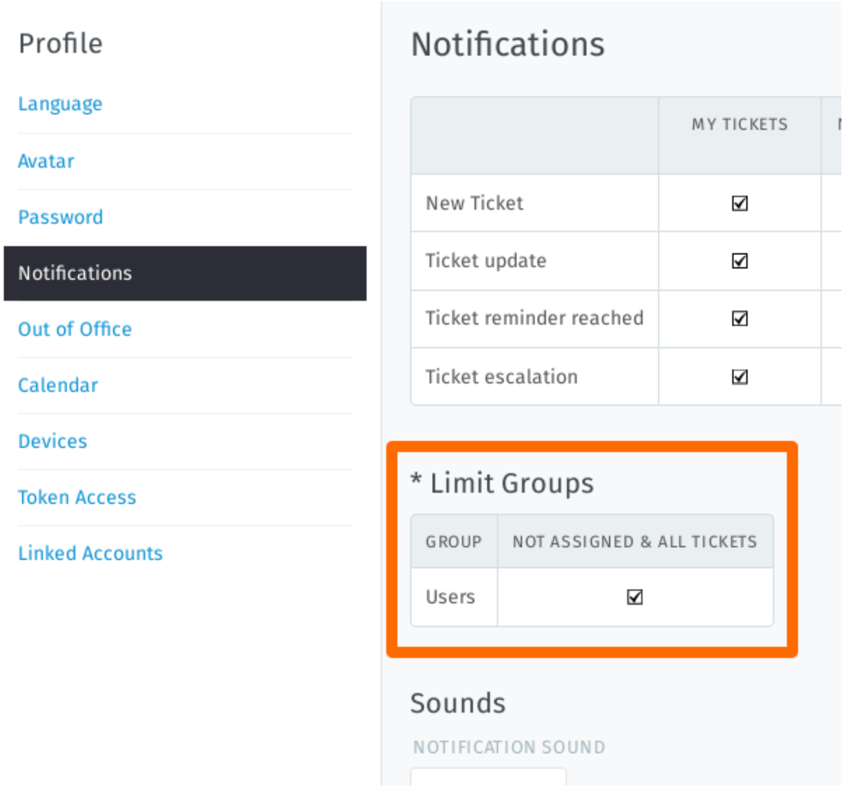
Without groups, all ten agents can see (and respond to) every single ticket that comes in, regardless of which department it's for. This isn't problematic *per se,* but it does lead to a lot of unnecessary clutter in the *overviews menu*. (It can be much worse when, for example, a customer service rep 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*:


Profile
Language
Avatar
Password
Notifications
Out of Office
Calendar
Devices
Token Access
Linked Accounts
Notifications
Sounds
NOTIFICATION SOUND

	MY TICKETS
New Ticket	☑
Ticket update	☑
Ticket reminder reached	☑
Ticket escalation	☑

* Limit Groups

GROUP	NOT ASSIGNED & ALL TICKETS
Users	☑

Fig. 9: This user belongs to only one group ("Users").

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.

4.3.2 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.

4.3.3 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)

State colors

Zammad states are color-coded. This helps you to understanding the state of the ticket much faster in general – without having a look into details.

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

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.

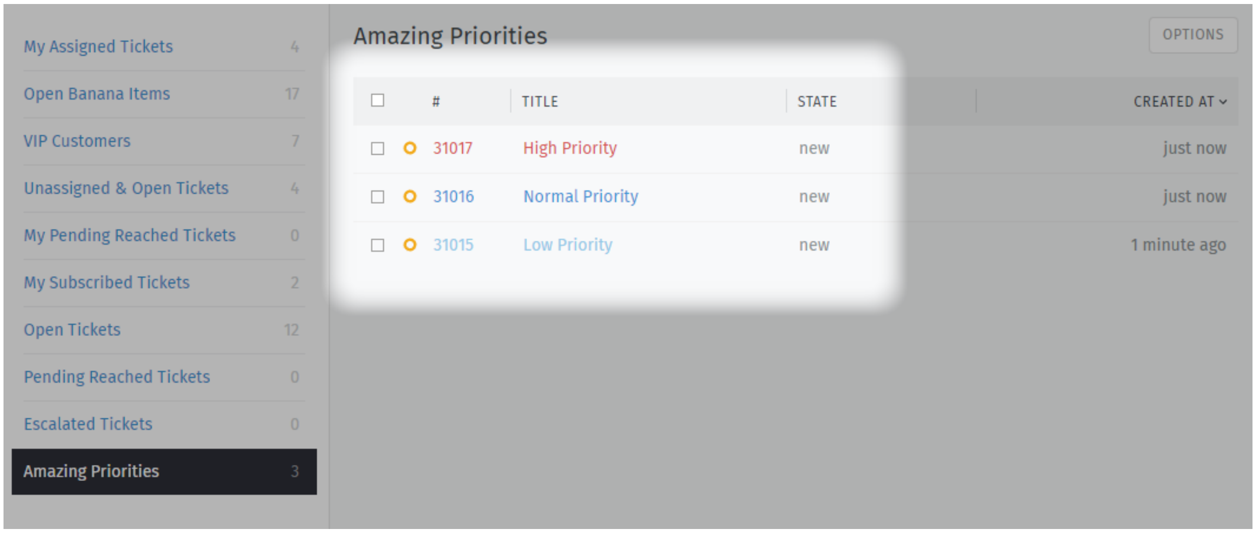
On an *open* ticket, the customer has received an initial response, but the issue still hasn't been resolved.

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.

4.3.4 Priority

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


My Assigned Tickets 4
Open Banana Items 17
VIP Customers 7
Unassigned & Open Tickets 4
My Pending Reached Tickets 0
My Subscribed Tickets 2
Open Tickets 12
Pending Reached Tickets 0
Escalated Tickets 0
Amazing Priorities 3
OPTIONS

Amazing Priorities

☐	#	TITLE	STATE	CREATED AT
☐	○ 31017	High Priority	new	just now
☐	○ 31016	Normal Priority	new	just now
☐	○ 31015	Low Priority	new	1 minute ago

Fig. 10: Zammad's 3 default priorities allow you to see the importance of your tickets better.

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.

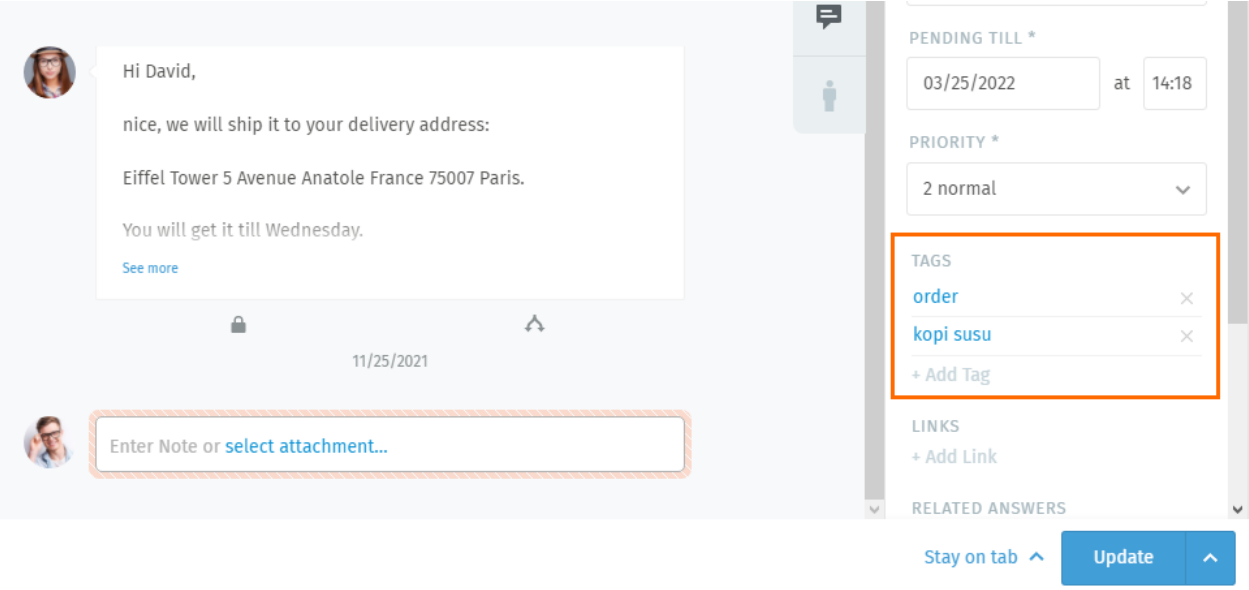
In other words, **consult your administrator** for details on how he'd like you to use it.

4.3.5 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.



Hi David,

nice, we will ship it to your delivery address:

Eiffel Tower 5 Avenue Anatole France 75007 Paris.

You will get it till Wednesday.

11/25/2021

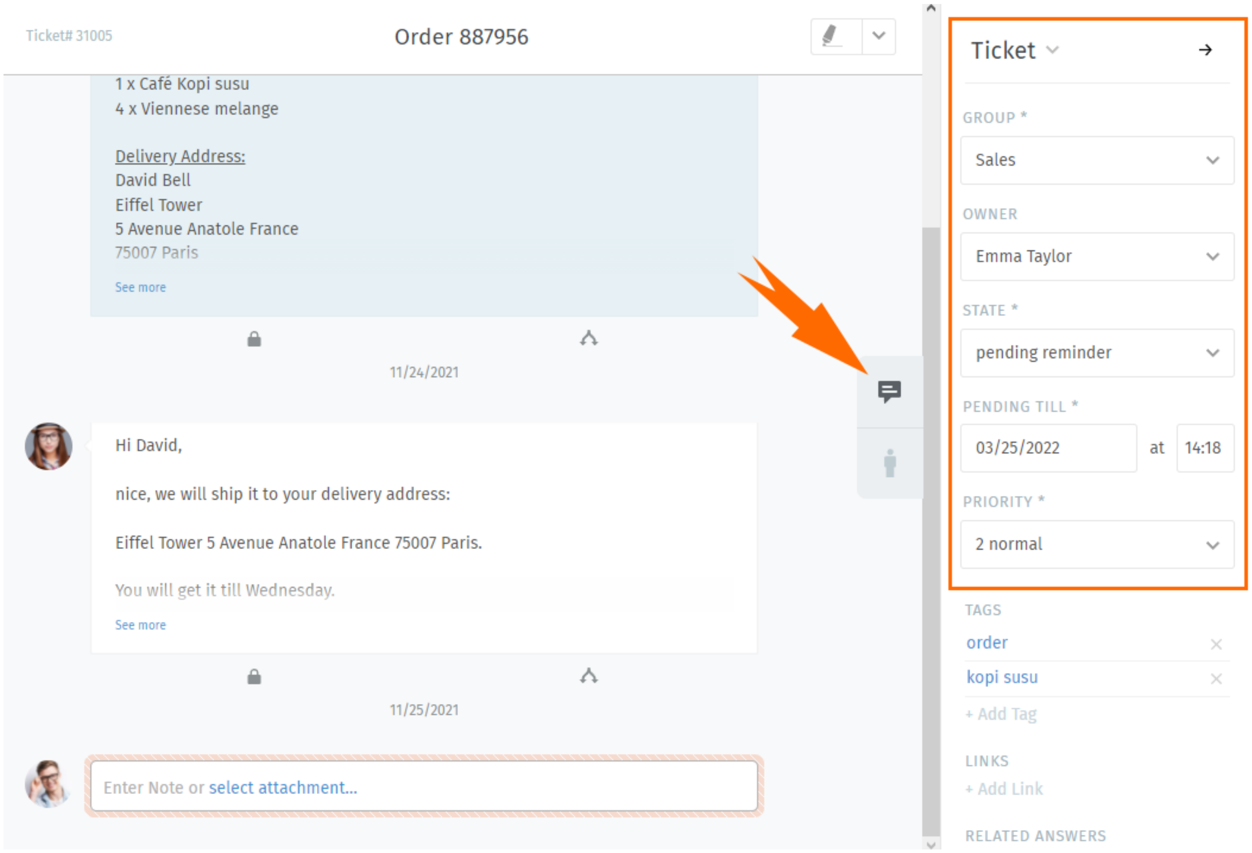
PENDING TILL *: 03/25/2022 at 14:18

PRIORITY *: 2 normal

TAGS: order, kopi susu

See more
Enter Note or select attachment...
+ Add Tag
LINKS
+ Add Link
RELATED ANSWERS
Stay on tab
Update

Fig. 11: Click on a tag name to view other tickets with the same tag.



Ticket# 31005

Order 887956

1 x Café Kopi susu
4 x Viennese melange

Delivery Address:
David Bell
Eiffel Tower
5 Avenue Anatole France
75007 Paris

11/24/2021

Hi David,

nice, we will ship it to your delivery address:

Eiffel Tower 5 Avenue Anatole France 75007 Paris.

You will get it till Wednesday.

11/25/2021

GROUP *: Sales

OWNER: Emma Taylor

STATE *: pending reminder

PENDING TILL *: 03/25/2022 at 14:18

PRIORITY *: 2 normal

TAGS: order, kopi susu

See more
See more
Enter Note or select attachment...
Ticket
+ Add Tag
LINKS
+ Add Link
RELATED ANSWERS

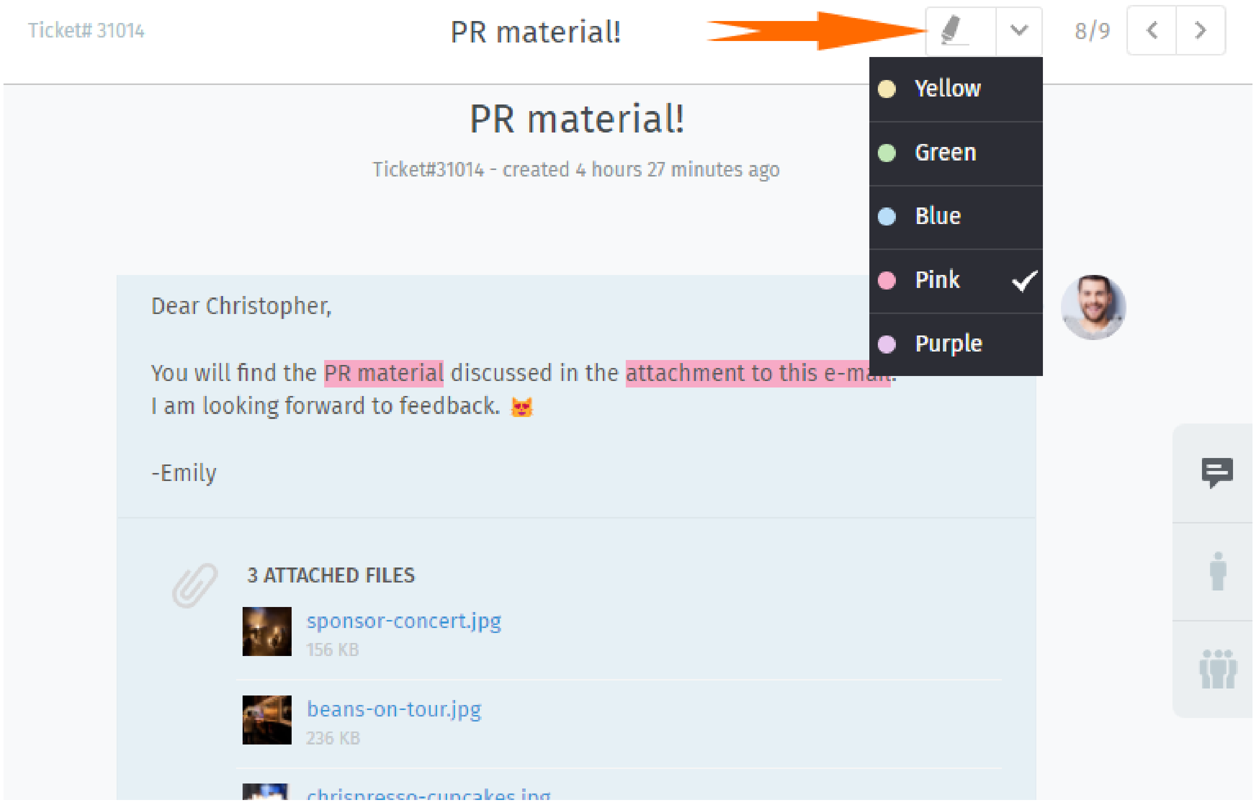
Fig. 12: Click the → button in the corner to hide the ticket pane. Click the tab to bring it back.

4.3.6 Renaming a Ticket

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

4.3.7 Highlighting Ticket Text

Use the highlighter tool in the upper-righthand corner to mark up important text. (Your highlights are visible to other agents.)


Ticket# 31014
PR material!
8/9
Yellow
Green
Blue
Pink ✓
Purple
3 ATTACHED FILES
sponsor-concert.jpg
156 KB
beans-on-tour.jpg
236 KB
chrispresso-cupcakes.jpg

PR material!

Ticket#31014 - created 4 hours 27 minutes ago

Dear Christopher,

You will find the PR material discussed in the attachment to this e-mail.
I am looking forward to feedback.

-Emily

Fig. 13: Highlight by selecting text, then clicking the highlighter. Click again to undo.

Tip: UI Protip

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

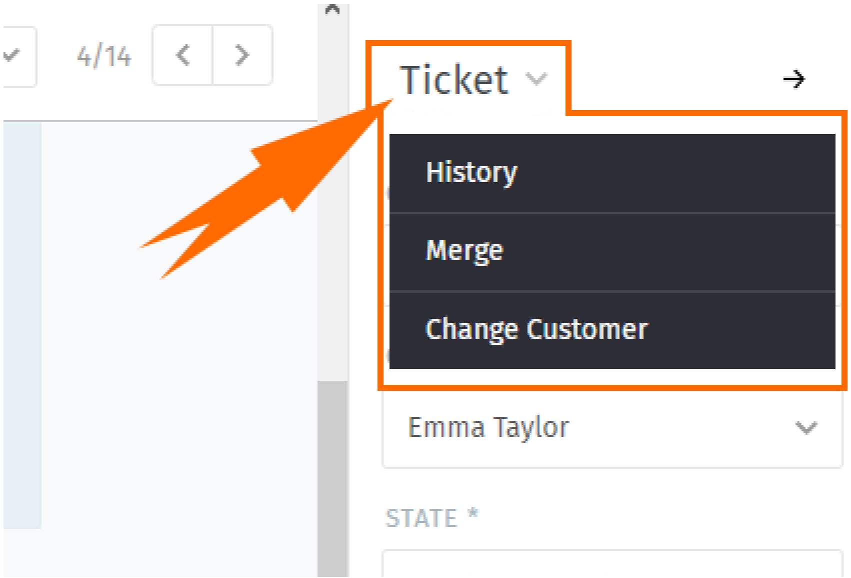

4/14
Ticket
History
Merge
Change Customer
Emma Taylor
STATE *

Fig. 14: Click the **Ticket** heading to access additional actions.

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.

CHAPTER FIVE

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.

5.1 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**.

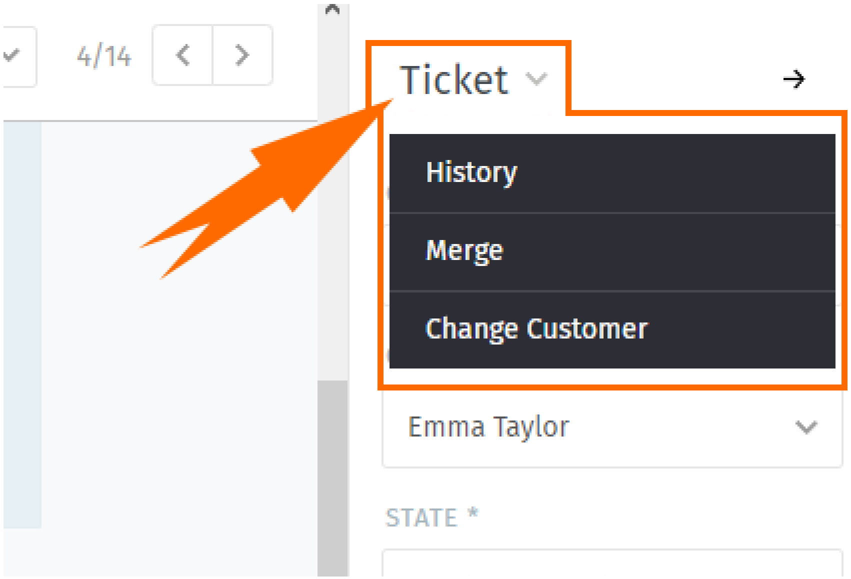
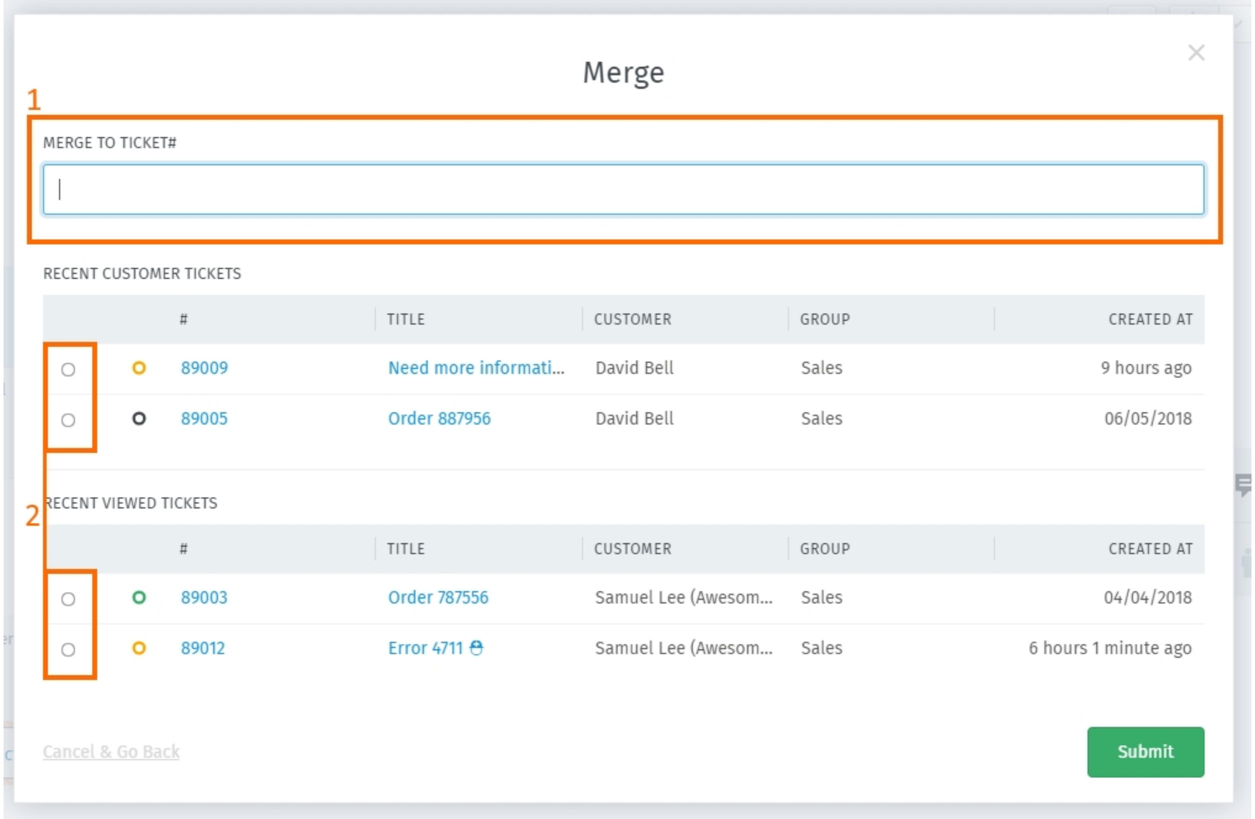


Fig. 1: To merge a ticket, access the **Ticket** submenu in the ticket pane.

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.



MERGE TO TICKET#

RECENT CUSTOMER TICKETS

		#	TITLE	CUSTOMER	GROUP	CREATED AT
○	○	89009	Need more informati...	David Bell	Sales	9 hours ago
○	○	89005	Order 887956	David Bell	Sales	06/05/2018

RECENT VIEWED TICKETS

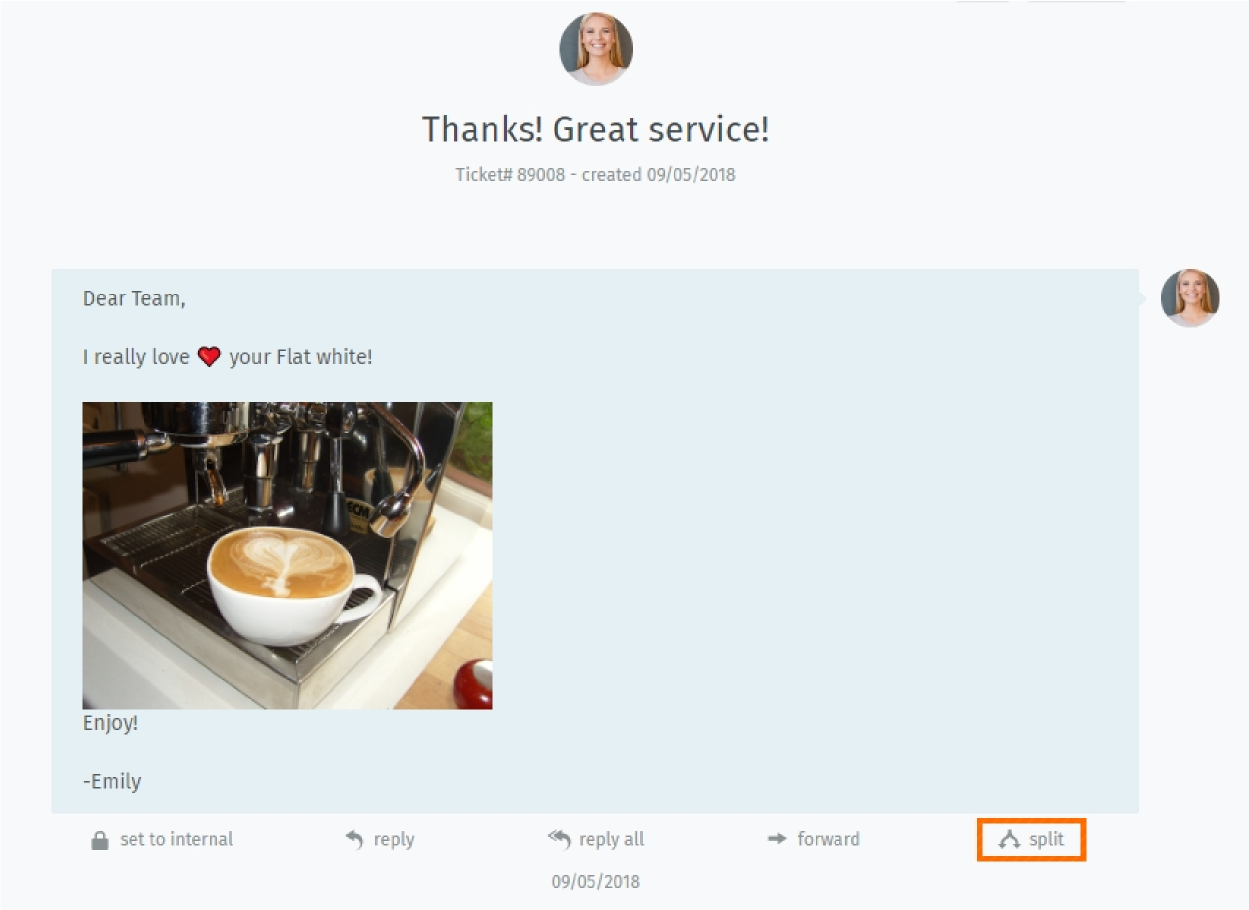
		#	TITLE	CUSTOMER	GROUP	CREATED AT
○	○	89003	Order 787556	Samuel Lee (Awesom...	Sales	04/04/2018
○	○	89012	Error 4711	Samuel Lee (Awesom...	Sales	6 hours 1 minute ago

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

5.2 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.)



Thanks! Great service!

Ticket# 89008 - created 09/05/2018

Dear Team,

I really love ❤ your Flat white!

Enjoy!

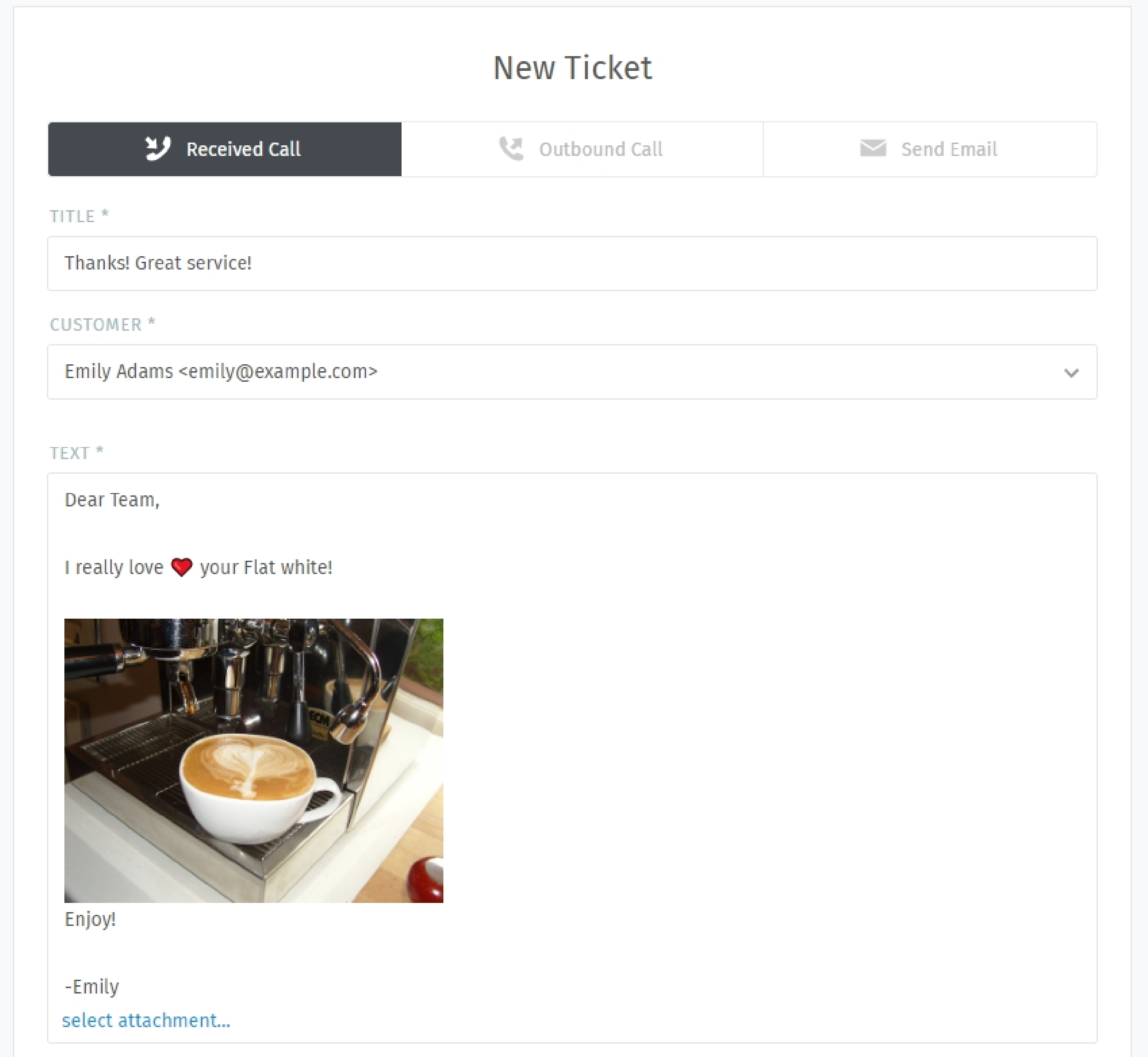
-Emily

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

5.3 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.


New Ticket
Received Call
Outbound Call
Send Email

TITLE *

Thanks! Great service!

CUSTOMER *

Emily Adams <emily@example.com>

TEXT *

Dear Team,

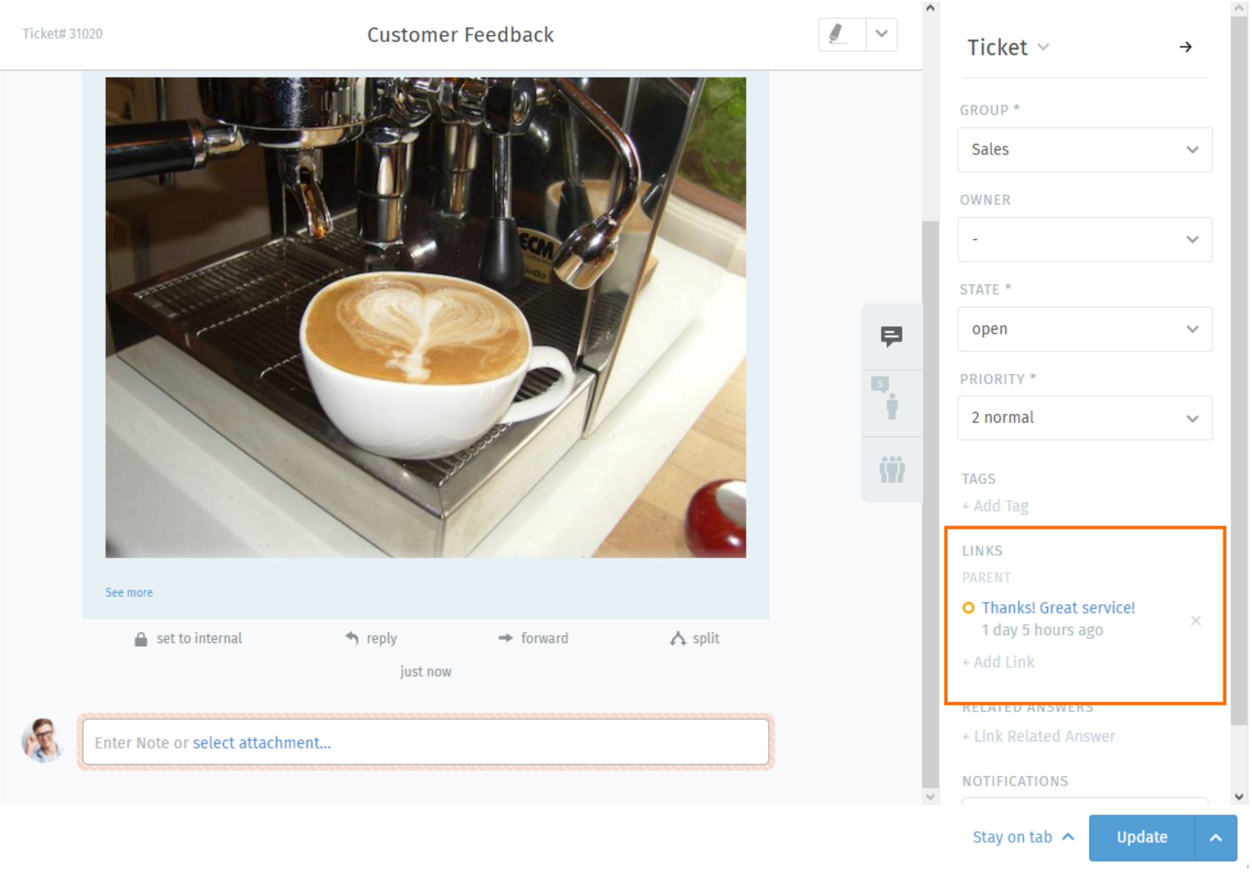
I really love ❤ your Flat white!

Enjoy!

-Emily

select attachment...

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).


Ticket# 31020
Customer Feedback
See more
set to internal
reply
forward
split
just now
Enter Note or select attachment...
Ticket
+ Add Tag
+ Add Link
RELATED ANSWERS
+ Link Related Answer
NOTIFICATIONS
Stay on tab
Update

GROUP *: Sales

OWNER: -

STATE *: open

PRIORITY *: 2 normal

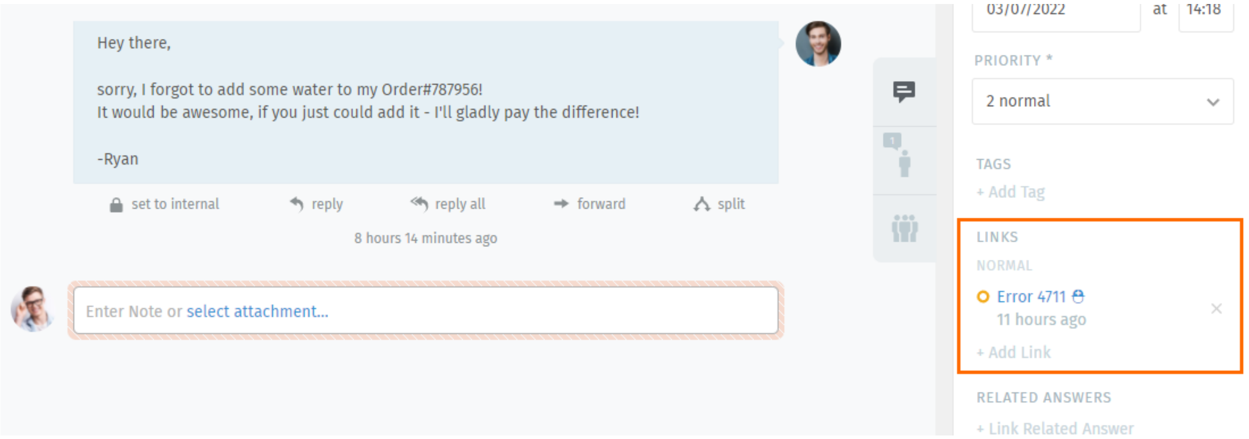
TAGS

LINKS

PARENT

Thanks! Great service!
1 day 5 hours ago

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



Hey there,

sorry, I forgot to add some water to my Order#787956!
It would be awesome, if you just could add it - I'll gladly pay the difference!

-Ryan

set to internal
reply
reply all
forward
split
8 hours 14 minutes ago
Enter Note or select attachment...
+ Add Tag
+ Add Link
RELATED ANSWERS
+ Link Related Answer

03/07/2022 at 14:18

PRIORITY *: 2 normal

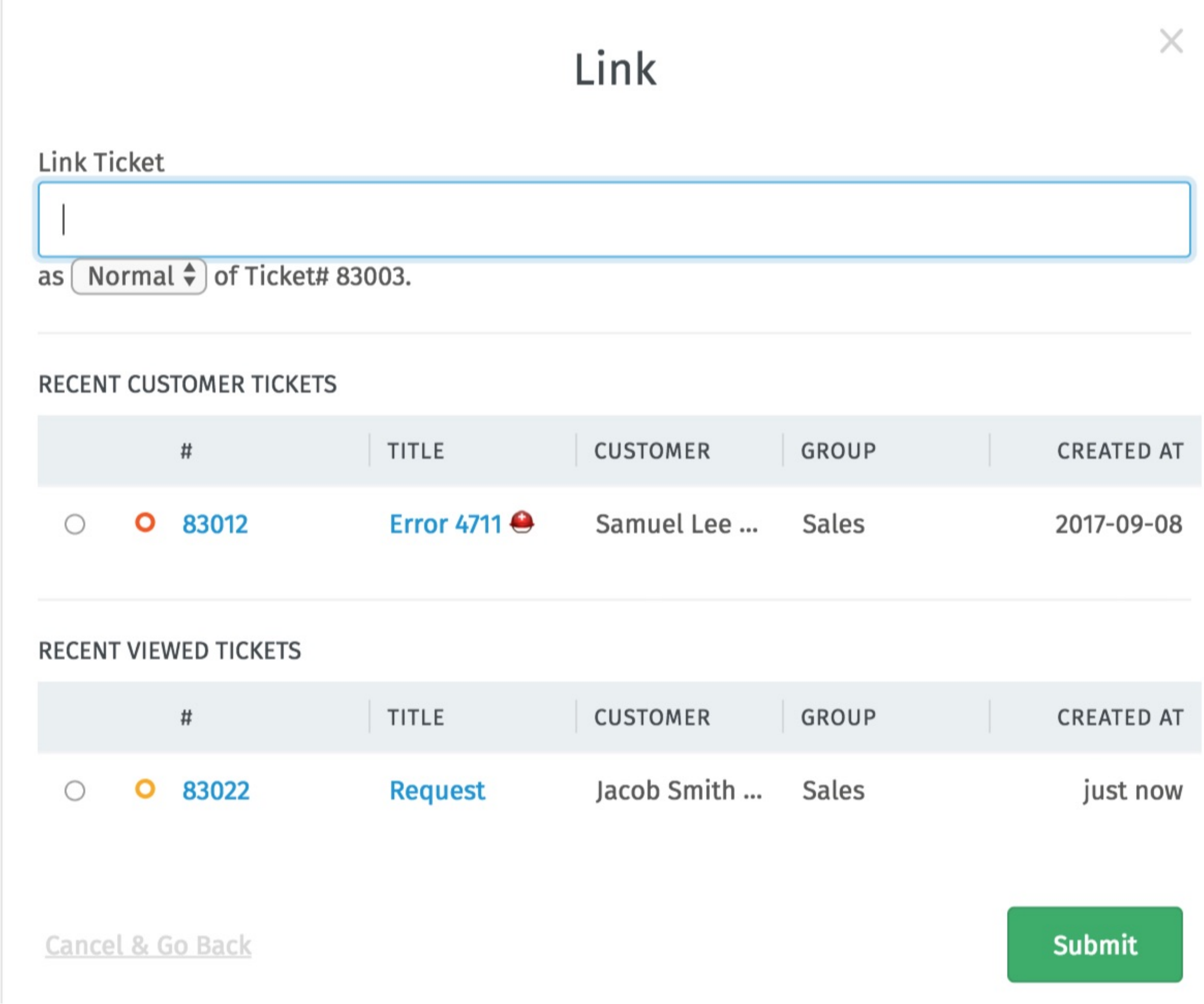
TAGS

LINKS

NORMAL

Error 4711
11 hours ago

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



Link

Link Ticket

as Normal of Ticket# 83003.

RECENT CUSTOMER TICKETS

		#	TITLE	CUSTOMER	GROUP	CREATED AT
○	○	83012	Error 4711	Samuel Lee ...	Sales	2017-09-08

RECENT VIEWED TICKETS

		#	TITLE	CUSTOMER	GROUP	CREATED AT
○	○	83022	Request	Jacob Smith ...	Sales	just now

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

CHAPTER

SIX

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.

6.1 Tab behavior in ticket zooms

You may have noticed the “Stay on tab” button next to “Update” on the lower right already.

Note: The behavior of a tab can be configured by your administrator globally. You can overrule this setting based on your personal preference.

To overrule your administrator’s settings, simply choose the action you prefer. Zammad will remember this preference until you change its setting.

Close tab Upon updating the ticket, Zammad will automatically close the tab. You’ll be returned to the last view that was open.

Close tab on ticket close Ticket tabs will be closed only if you change the state to “closed” upon ticket update.

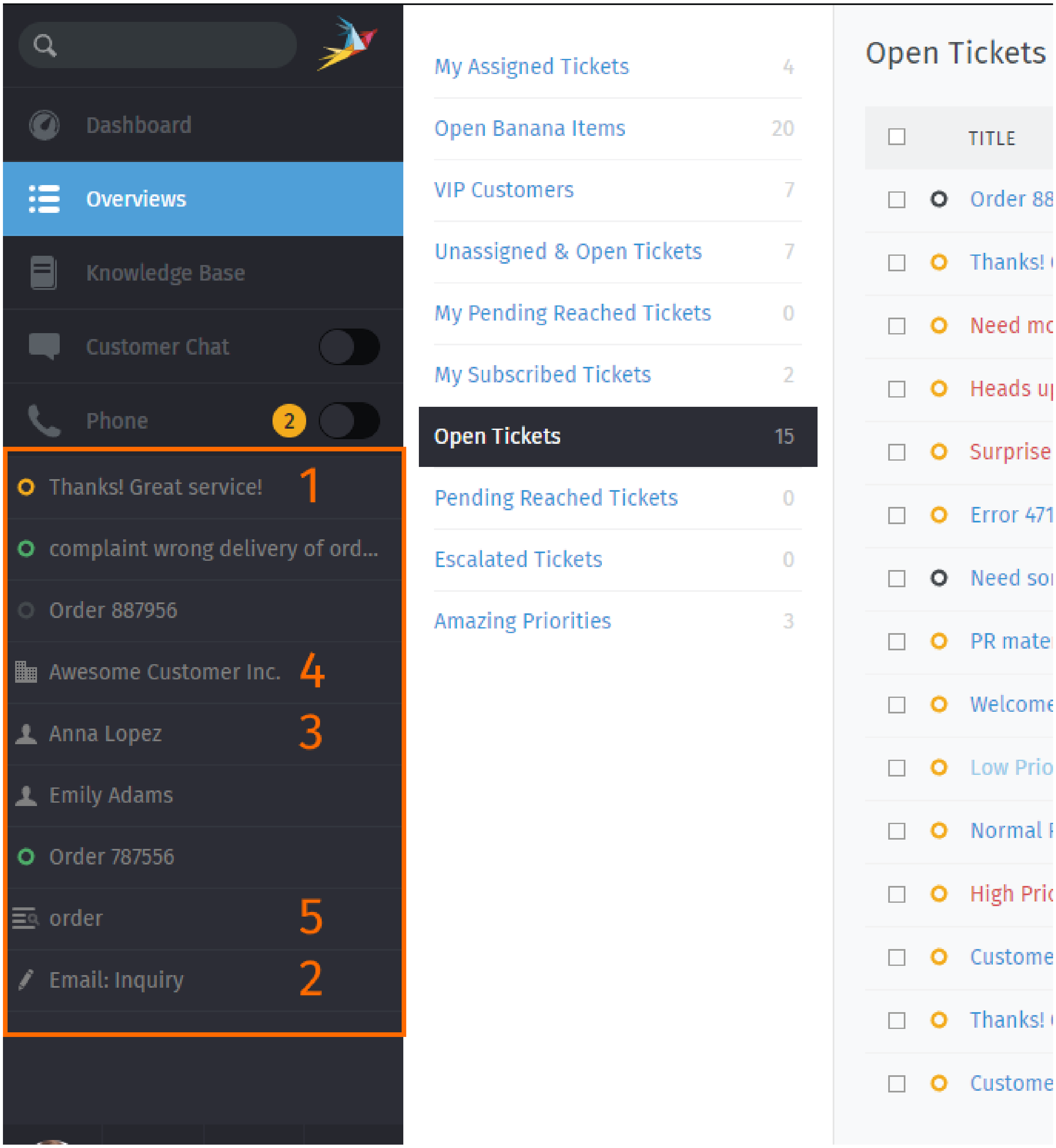
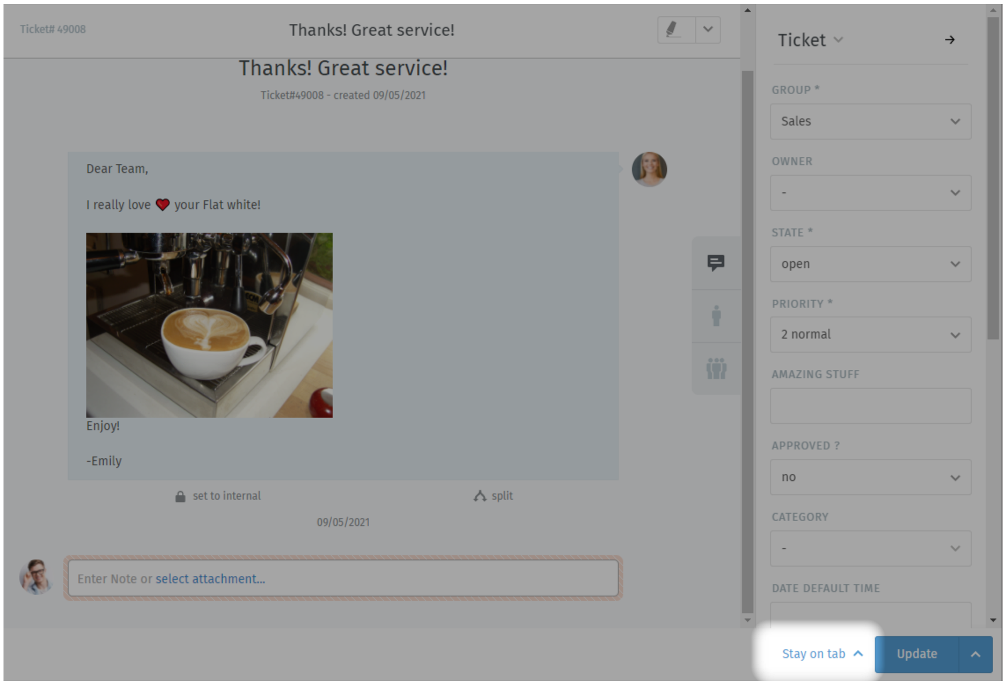

Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
1
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
4
Anna Lopez
3
Emily Adams
Order 787556
order
5
Email: Inquiry
2
My Assigned Tickets 4
Open Banana Items 20
VIP Customers 7
Unassigned & Open Tickets 7
My Pending Reached Tickets 0
My Subscribed Tickets 2
Open Tickets 15
Pending Reached Tickets 0
Escalated Tickets 0
Amazing Priorities 3
Open Tickets
TITLE
Order 88
Thanks!
Need mo
Heads up
Surprise
Error 471
Need so
PR mate
Welcome
Low Prio
Normal
High Pric
Custome
Thanks!
Custome

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



Ticket# 49008
Thanks! Great service!
set to internal
split
09/05/2021
Enter Note or select attachment...
Ticket
Stay on tab
Update

Thanks! Great service!

Ticket#49008 - created 09/05/2021

Dear Team,

I really love ❤ your Flat white!

Enjoy!

-Emily

GROUP * Sales

OWNER -

STATE * open

PRIORITY * 2 normal

AMAZING STUFF

APPROVED ? no

CATEGORY -

DATE DEFAULT TIME

Note: This does not apply for pending states that end in closed states.

Next in overview If you opened a ticket from any overview, Zammad will jump to the next ticket in said overview. Zammad recycles the open tab.

Note: This option is only available if you open the ticket from an overview. Zammad will ignore the setting if you opened the ticket directly and fall back to `Stay on tab`.

Stay on tab Updating the ticket doesn't have any effect on the tab.

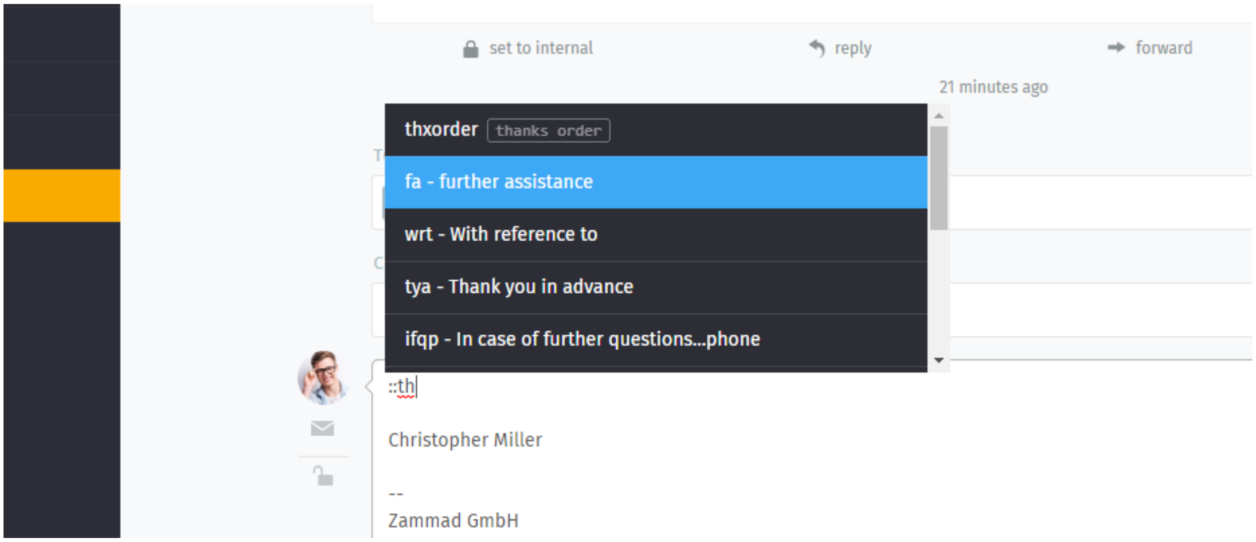
This is the default setting in Zammad installations.

CHAPTER
SEVEN

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.


set to internal
reply
forward
21 minutes ago
thxorder thanks order
fa - further assistance
wrt - With reference to
tya - Thank you in advance
ifqp - In case of further questions...phone

::th

Christopher Miller

--
Zammad GmbH

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!

7.1 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.

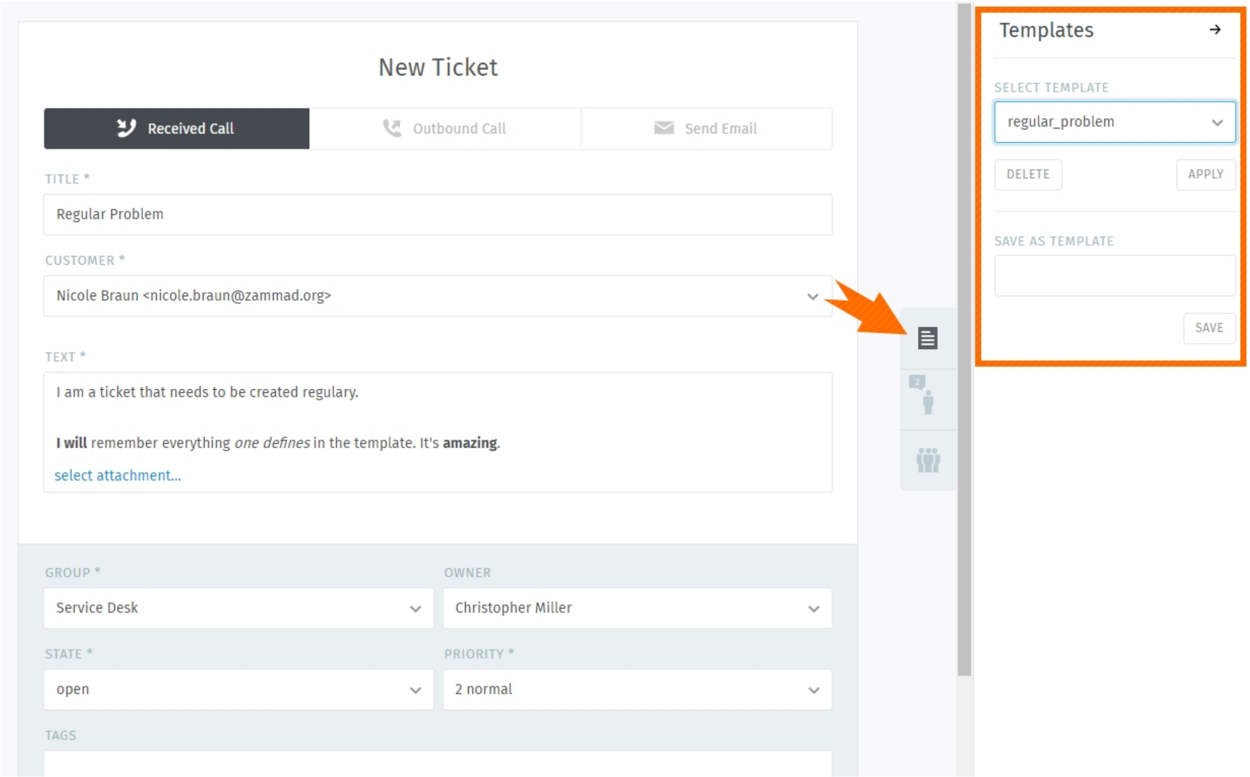
7.2 Customizing text modules

Administrators can learn more about customizing text modules here.

CHAPTER
EIGHT

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.


New Ticket
Received Call
Outbound Call
Send Email
select attachment...
Templates
DELETE
APPLY
SAVE AS TEMPLATE
SAVE
TAGS

TITLE *: Regular Problem

CUSTOMER *: Nicole Braun <nicole.braun@zammad.org>

TEXT *:

I am a ticket that needs to be created regulary.

I will remember everything *one defines* in the template. It's **amazing**.

GROUP *: Service Desk

OWNER: Christopher Miller

STATE *: open

PRIORITY *: 2 normal

SELECT TEMPLATE: regular_problem

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

NINE

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)
```

Note: Search phrases changed for Zammad 4.0

With Zammad <=3.6 the following keys contained a string only:

- group
- priority
- state
- organization

With Zammad >=4.0 these keys contain the whole object. This means you now have to add `.name` (e. g. `group.name` or `priority.name`) to receive the same search results.

9.1 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.

9.2 Some Ticket attributes and their type

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

9.2.1 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

9.2.2 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

TEN

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.

10.1 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.

10.2 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

ELEVEN

SUGGESTED WORKFLOWS

11.1 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**.)

11.1.1 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!

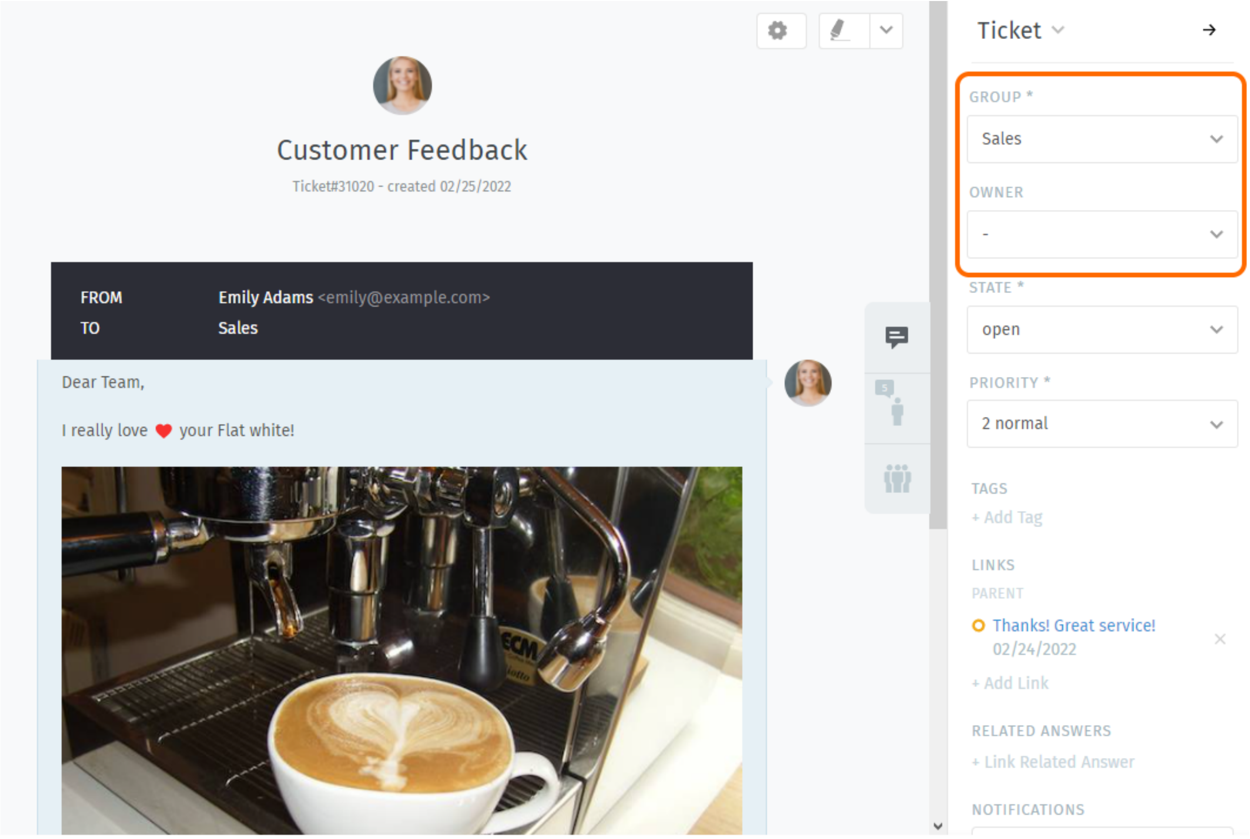
11.1.2 @mentions & the Subscribe Button

Now suppose you've reassigned the ticket to customer service. You won't receive notifications for this ticket anymore, but maybe this is a really important contract, and you want to make sure they have an A+ experience from start to finish.

To enable notifications for a ticket that doesn't belong to you, simply click the **Subscribe** button at the bottom of the ticket pane:

Or, suppose you *don't* want to reassign the ticket to customer service—you just have one quick question for them, and then you can take it from there.

To start sending someone else notifications for your own ticket, type `@@` in the message composer and select their name from the pop-up menu:


Customer Feedback

Ticket#31020 - created 02/25/2022

FROM Emily Adams <emily@example.com>
TO Sales

Dear Team,

I really love ❤ your Flat white!

Ticket

GROUP * Sales

OWNER -

STATE * open

PRIORITY * 2 normal

TAGS
+ Add Tag

LINKS
PARENT
Thanks! Great service!
02/24/2022
+ Add Link

RELATED ANSWERS
+ Link Related Answer

NOTIFICATIONS

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

Fig. 2: A list of all tickets you're subscribed to can be found in the **My mentioned Tickets** overview.

Fig. 3: @mentioning a colleague in a message will automatically subscribe them to your ticket.

Hint: Check your *Profile & Settings* to customize how you receive notifications.

Note: **A colleague @mentioned me, but I don't see the ticket!**

Is the ticket assigned to a group that you don't belong to? @mentions and subscriptions only work for tickets that you already have access to.

11.1.3 Quickly assign in ticket listings

Within overviews and detailed searches you can run bulk operations on tickets. This means you can adjust the following ticket information:

- group
- owner
- state (with pending time if applicable)
- priority

After pressing "Confirm" Zammad also allows you to provide an internal or public note of why you adjusted the settings.

> **Note:** Zammad *will not* ask for *time accounting values* in these situations.

Fig. 4: Use the check boxes in ticket listings to select a bunch of tickets. Now use below drop-downs to change ticket settings, press confirm and provide a note if you'd like.

Tip: **You can change owners and groups even faster**

Fig. 5: Instead of using the drop-downs on the bottom of Zammad, you can also drag tickets. A new modal will appear and allow you to drop your selection on either just a group or agents. This operation allows you to quickly change the group and owner without further hassle!

Note: This functionality is only available in ticket overviews.

CHAPTER

TWELVE

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.

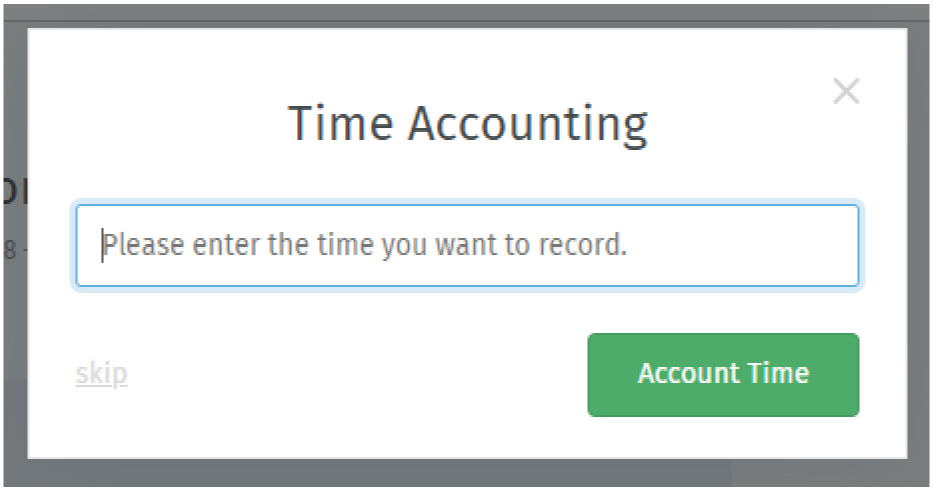

Time Accounting
Please enter the time you want to record.
skip
Account Time

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

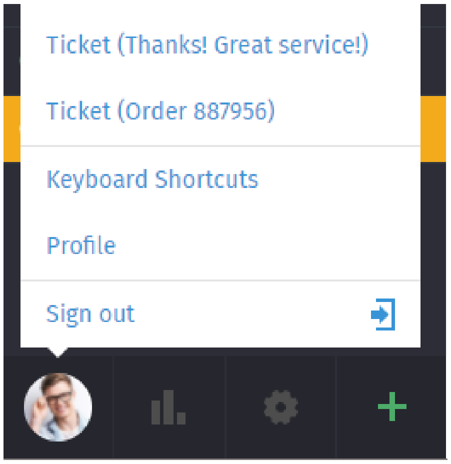
THIRTEEN

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**.


Ticket (Thanks! Great service!)
Ticket (Order 887956)
Keyboard Shortcuts
Profile
Sign out

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

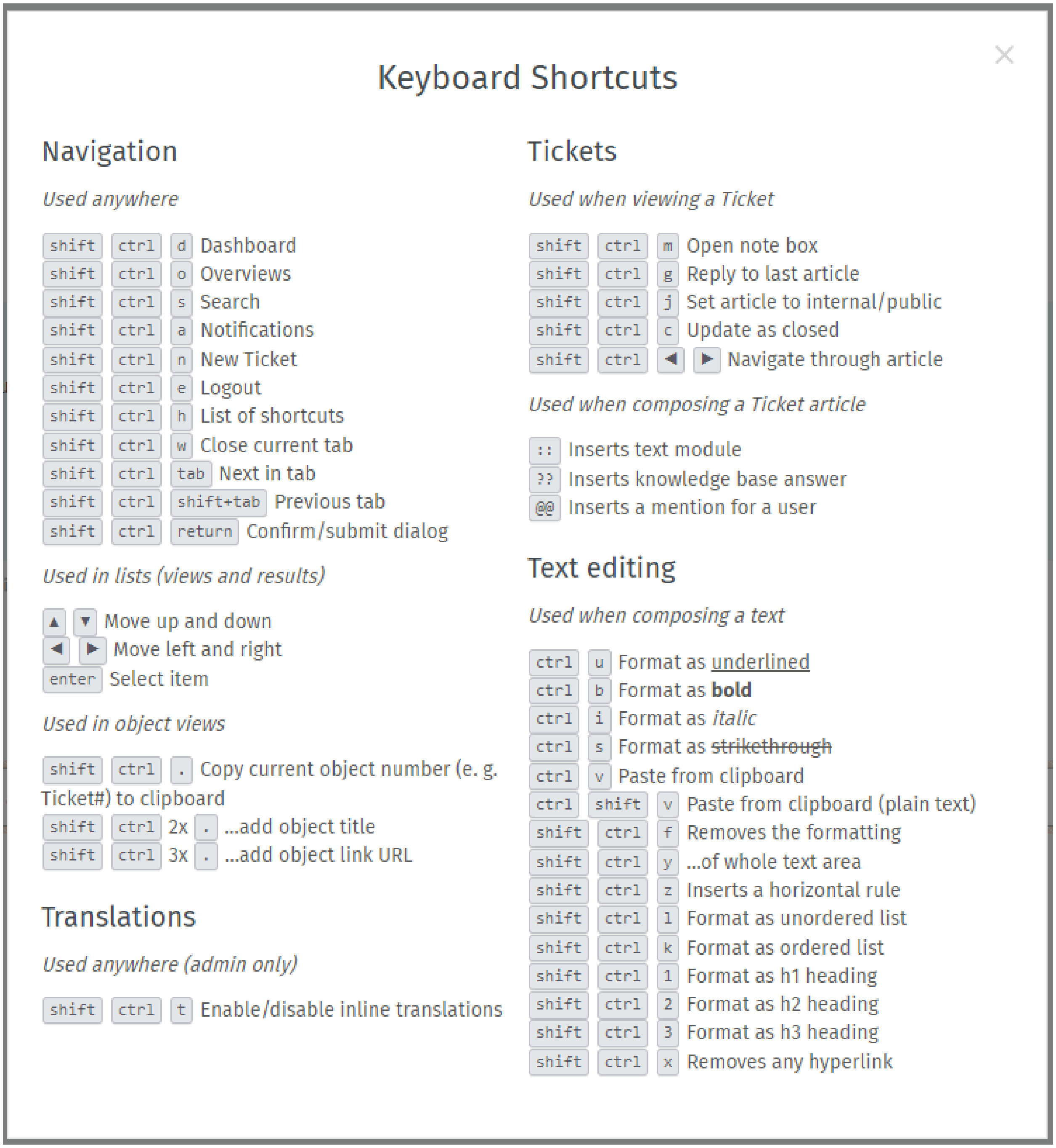
- `Ctrl` + `Shift` + `H` (on Windows)
- `Ctrl` + `Shift` + `H` (on Linux)
- `Cmd` + `Ctrl` + `Shift` + `H` (on macOS)

13.1 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.



Keyboard Shortcuts

Navigation

Used anywhere

shift ctrl d	Dashboard
shift ctrl o	Overviews
shift ctrl s	Search
shift ctrl a	Notifications
shift ctrl n	New Ticket
shift ctrl e	Logout
shift ctrl h	List of shortcuts
shift ctrl w	Close current tab
shift ctrl tab	Next in tab
shift ctrl shift+tab	Previous tab
shift ctrl return	Confirm/submit dialog

Used in lists (views and results)

▲ ▼	Move up and down
◀ ▶	Move left and right
enter	Select item

Used in object views

shift ctrl .	Copy current object number (e. g. Ticket#) to clipboard
shift ctrl 2x .	...add object title
shift ctrl 3x .	...add object link URL

Translations

Used anywhere (admin only)

shift ctrl t	Enable/disable inline translations

Tickets

Used when viewing a Ticket

shift ctrl m	Open note box
shift ctrl g	Reply to last article
shift ctrl j	Set article to internal/public
shift ctrl c	Update as closed
shift ctrl ◀ ▶	Navigate through article

Used when composing a Ticket article

::	Inserts text module
??	Inserts knowledge base answer
@@	Inserts a mention for a user

Text editing

Used when composing a text

ctrl u	Format as underlined
ctrl b	Format as **bold**
ctrl i	Format as *italic*
ctrl s	Format as ~~strikethrough~~
ctrl v	Paste from clipboard
ctrl shift v	Paste from clipboard (plain text)
shift ctrl f	Removes the formatting
shift ctrl y	...of whole text area
shift ctrl z	Inserts a horizontal rule
shift ctrl l	Format as unordered list
shift ctrl k	Format as ordered list
shift ctrl 1	Format as h1 heading
shift ctrl 2	Format as h2 heading
shift ctrl 3	Format as h3 heading
shift ctrl x	Removes any hyperlink

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

All-at-once

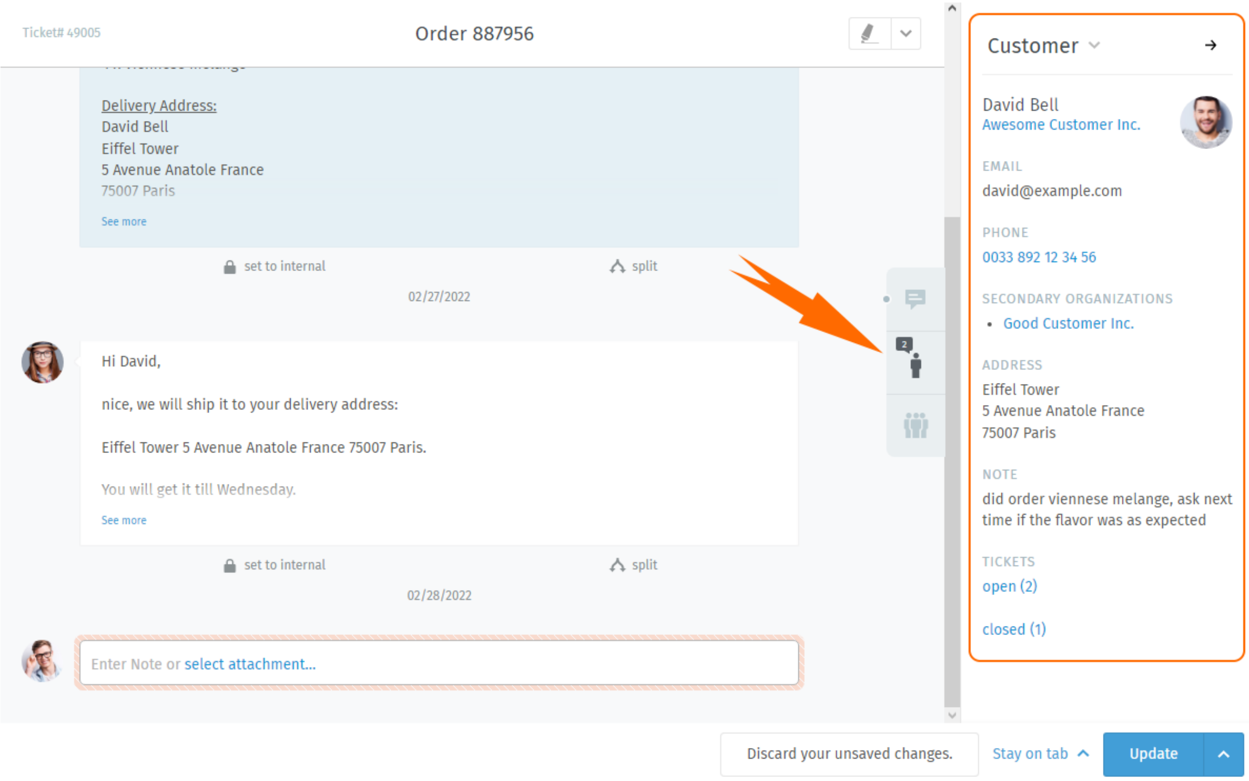
- Enter your desired text,
- click-and-drag with the mouse to select it, and
- press `Cmd` + `I` to italicize.

CHAPTER

FOURTEEN

CUSTOMERS

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



Ticket# 49005

Order 887956

Delivery Address:
David Bell
Eiffel Tower
5 Avenue Anatole France
75007 Paris

02/27/2022

Hi David,

nice, we will ship it to your delivery address:

Eiffel Tower 5 Avenue Anatole France 75007 Paris.

You will get it till Wednesday.

02/28/2022

Enter Note or select attachment...

Customer

David Bell
Awesome Customer Inc.

EMAIL
david@example.com

PHONE
0033 892 12 34 56

SECONDARY ORGANIZATIONS
- Good Customer Inc.

ADDRESS
Eiffel Tower
5 Avenue Anatole France
75007 Paris

NOTE
did order viennese melange, ask next time if the flavor was as expected

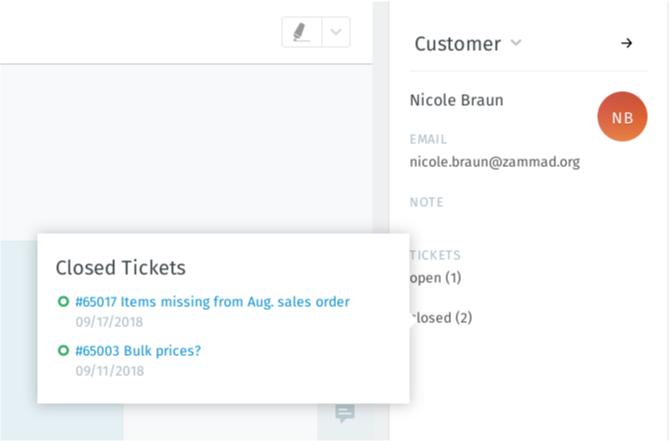
TICKETS
open (2)

closed (1)

See more
set to internal
split
See more
set to internal
split
2
Discard your unsaved changes.
Stay on tab
Update

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

Tip: UI Protip


Customer

Nicole Braun

NB

EMAIL

nicole.braun@zammad.org

NOTE

TICKETS

open (1)

losed (2)

Closed Tickets

#65017 Items missing from Aug. sales order

09/17/2018

#65003 Bulk prices?

09/11/2018

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

14.1 Editing a Customer

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

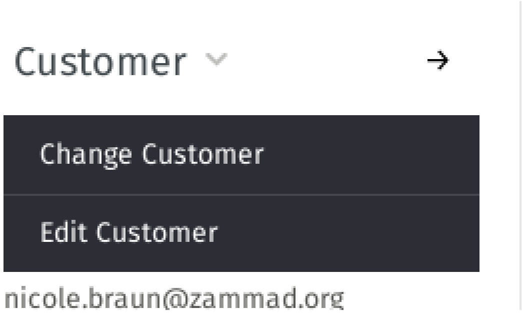


Fig. 3: Click the **Customer** heading to access additional actions.

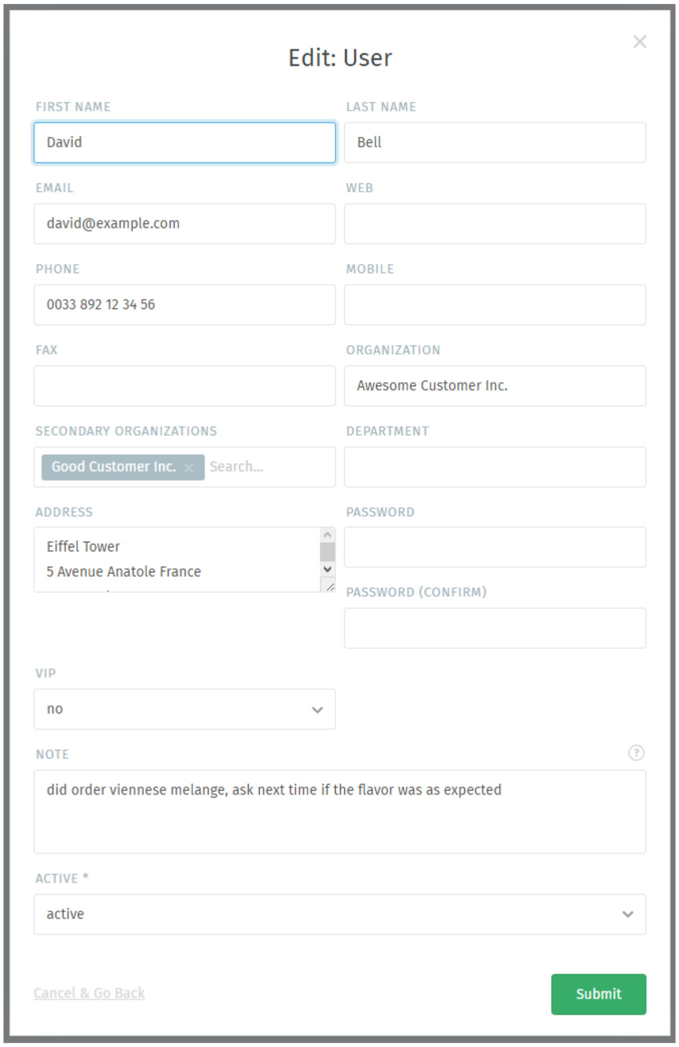
Most customer attributes are self-explanatory, but here are a couple that might confuse you:

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

Secondary Organizations Unlike organizations, you can add several organizations here that are not as highlighted. Still, the same behavior applies.

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).



Edit: User

FIRST NAME: David

LAST NAME: Bell

EMAIL: david@example.com

WEB

PHONE: 0033 892 12 34 56

MOBILE

FAX

ORGANIZATION: Awesome Customer Inc.

SECONDARY ORGANIZATIONS: Good Customer Inc.

DEPARTMENT

ADDRESS: Eiffel Tower
5 Avenue Anatole France

PASSWORD

PASSWORD (CONFIRM)

VIP: no

NOTE: did order viennese melange, ask next time if the flavor was as expected

ACTIVE *: active

Fig. 4: The edit customer dialog.

CHAPTER

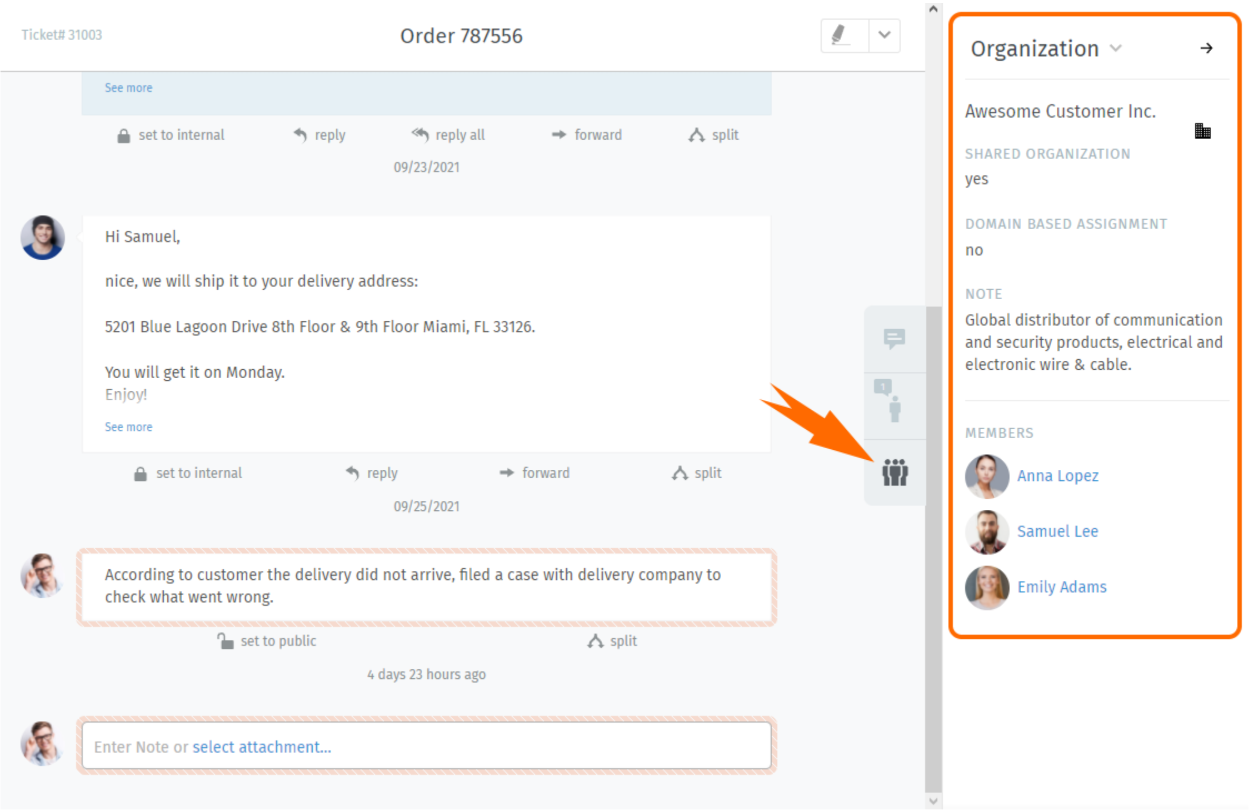
FIFTEEN

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.

15.1 Organization Profiles

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


Ticket# 31003
Order 787556
See more
set to internal
reply
reply all
forward
split
09/23/2021
See more
set to internal
reply
forward
split
09/25/2021
set to public
split
4 days 23 hours ago
Enter Note or select attachment...
Organization

Hi Samuel,

nice, we will ship it to your delivery address:

5201 Blue Lagoon Drive 8th Floor & 9th Floor Miami, FL 33126.

You will get it on Monday.
Enjoy!

According to customer the delivery did not arrive, filed a case with delivery company to check what went wrong.

Awesome Customer Inc.

SHARED ORGANIZATION
yes

DOMAIN BASED ASSIGNMENT
no

NOTE
Global distributor of communication and security products, electrical and electronic wire & cable.

MEMBERS
Anna Lopez
Samuel Lee
Emily Adams

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

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

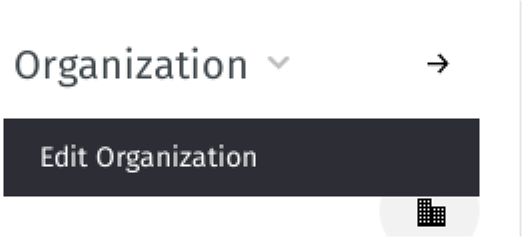
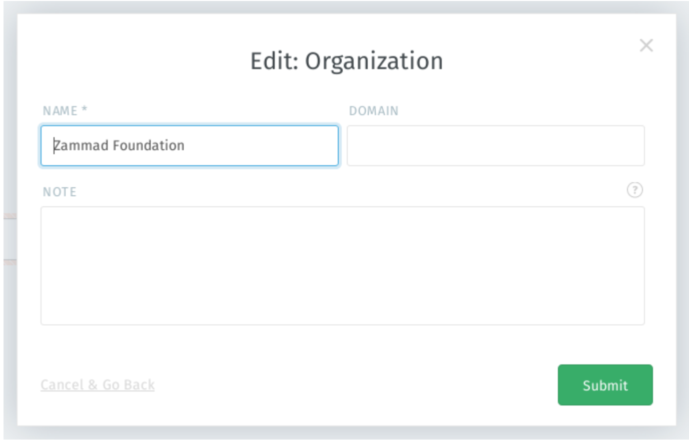

Organization
Edit Organization

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


Edit: Organization
Cancel & Go Back
Submit

NAME * Zammad Foundation

DOMAIN

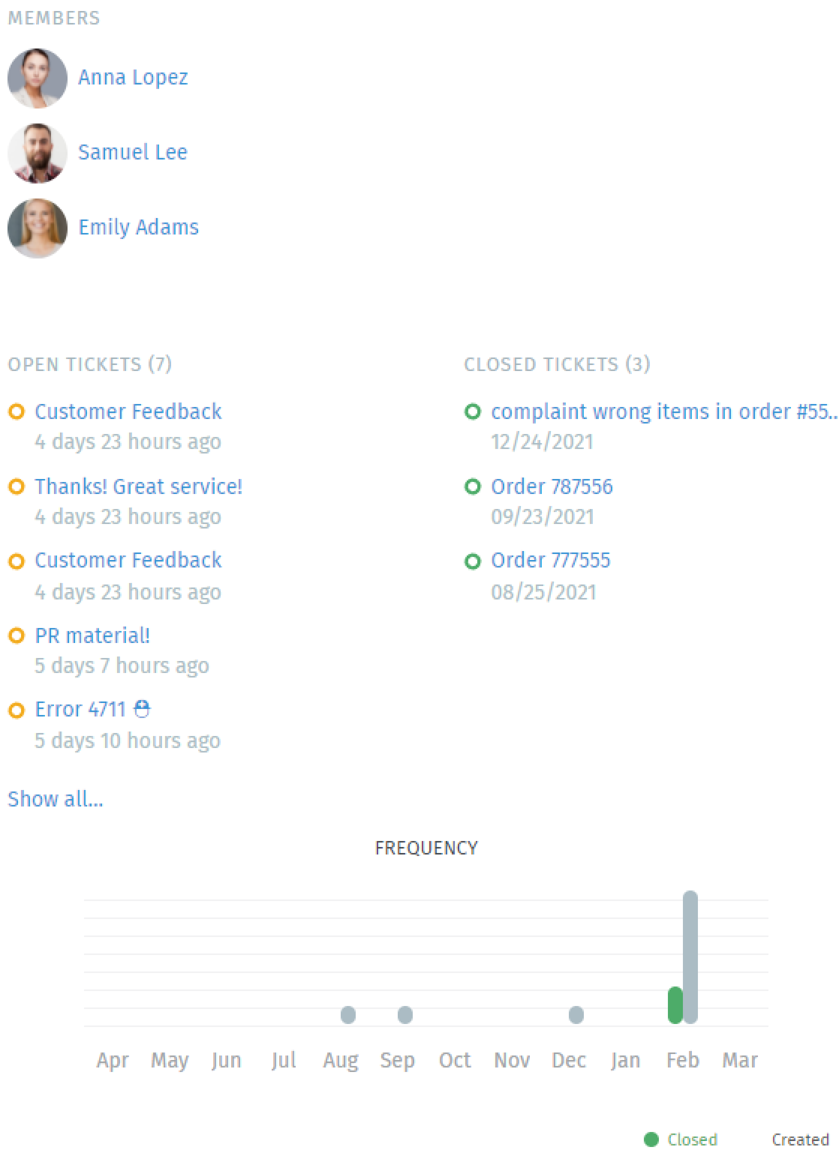
NOTE

Fig. 3: The edit organization dialog.

15.2 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?"



MEMBERS

Anna Lopez

Samuel Lee

Emily Adams

OPEN TICKETS (7)

- Customer Feedback
  4 days 23 hours ago
- Thanks! Great service!
  4 days 23 hours ago
- Customer Feedback
  4 days 23 hours ago
- PR material!
  5 days 7 hours ago
- Error 4711
  5 days 10 hours ago

Show all...

CLOSED TICKETS (3)

- complaint wrong items in order #55...
  12/24/2021
- Order 787556
  09/23/2021
- Order 777555
  08/25/2021

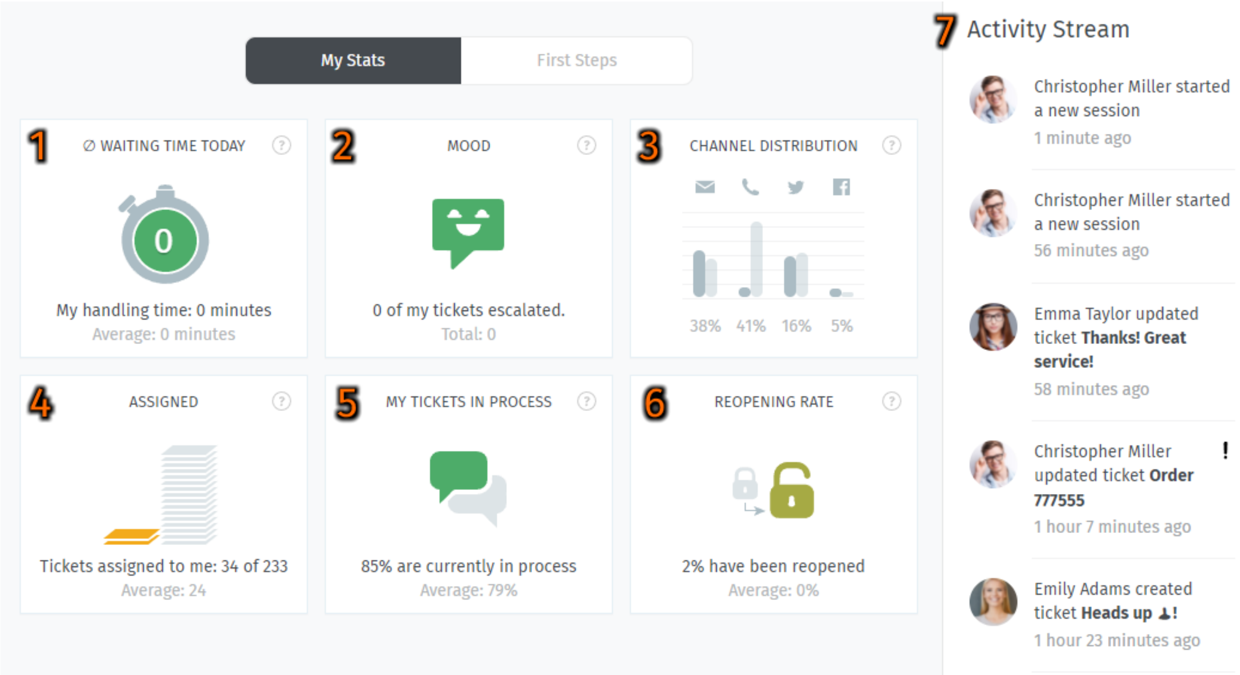
FREQUENCY
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
● Closed
Created

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

CHAPTER SIXTEEN

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.



My handling time: 0 minutes
Average: 0 minutes

0 of my tickets escalated.
Total: 0

Tickets assigned to me: 34 of 233
Average: 24

85% are currently in process
Average: 79%

2% have been reopened
Average: 0%

Christopher Miller started a new session
1 minute ago

Christopher Miller started a new session
56 minutes ago

Emma Taylor updated ticket **Thanks! Great service!**
58 minutes ago

Christopher Miller updated ticket **Order 777555** !
1 hour 7 minutes ago

Emily Adams created ticket **Heads up ⚠!**
1 hour 23 minutes ago

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

Table 1: 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. My 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
SEVENTEEN

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.

17.1 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**.

17.2 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.

17.2.1 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**. 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**. You can be confident that it's authentic and that the contents have not been modified.
✗	This message is **not signed**.

17.2.2 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.

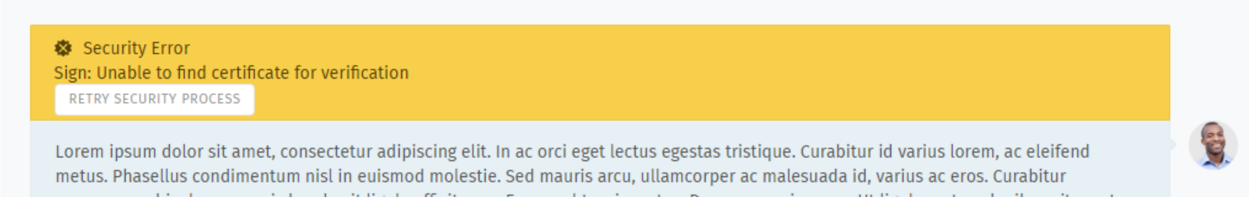
Table 2: Status Icons (Outgoing)

🔒	This message **will be encrypted**. 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**. 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**.

17.3 Troubleshooting

17.3.1 Incoming

“Sign: Unable to find certificate for validation”



Security Error

Sign: Unable to find certificate for verification

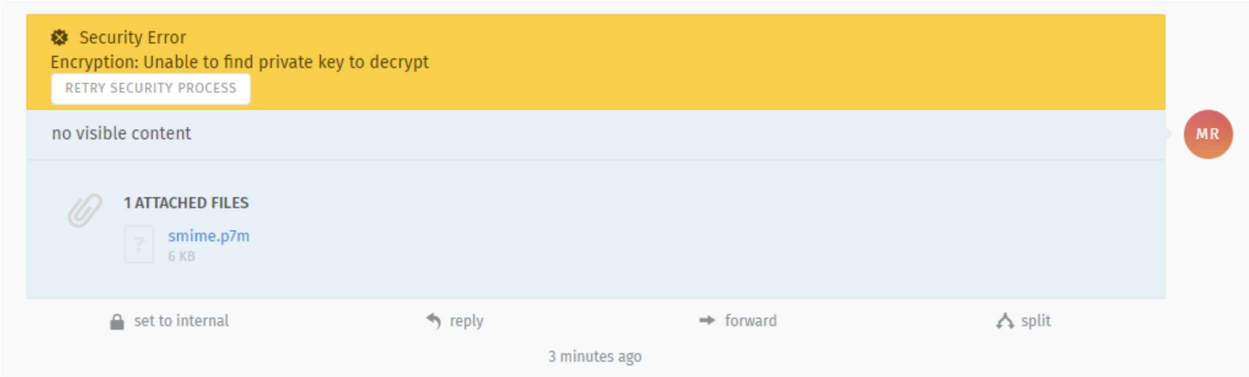
Lorem ipsum dolor sit amet, consectetur adipiscing elit. In ac orci eget lectus egestas tristique. Curabitur id varius lorem, ac eleifend metus. Phasellus condimentum nisl in euismod molestie. Sed mauris arcu, ullamcorper ac malesuada id, varius ac eros. Curabitur

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”



Security Error

Encryption: Unable to find private key to decrypt

no visible content

1 ATTACHED FILES

smime.p7m
6 KB

3 minutes ago

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.)

17.3.2 Outgoing

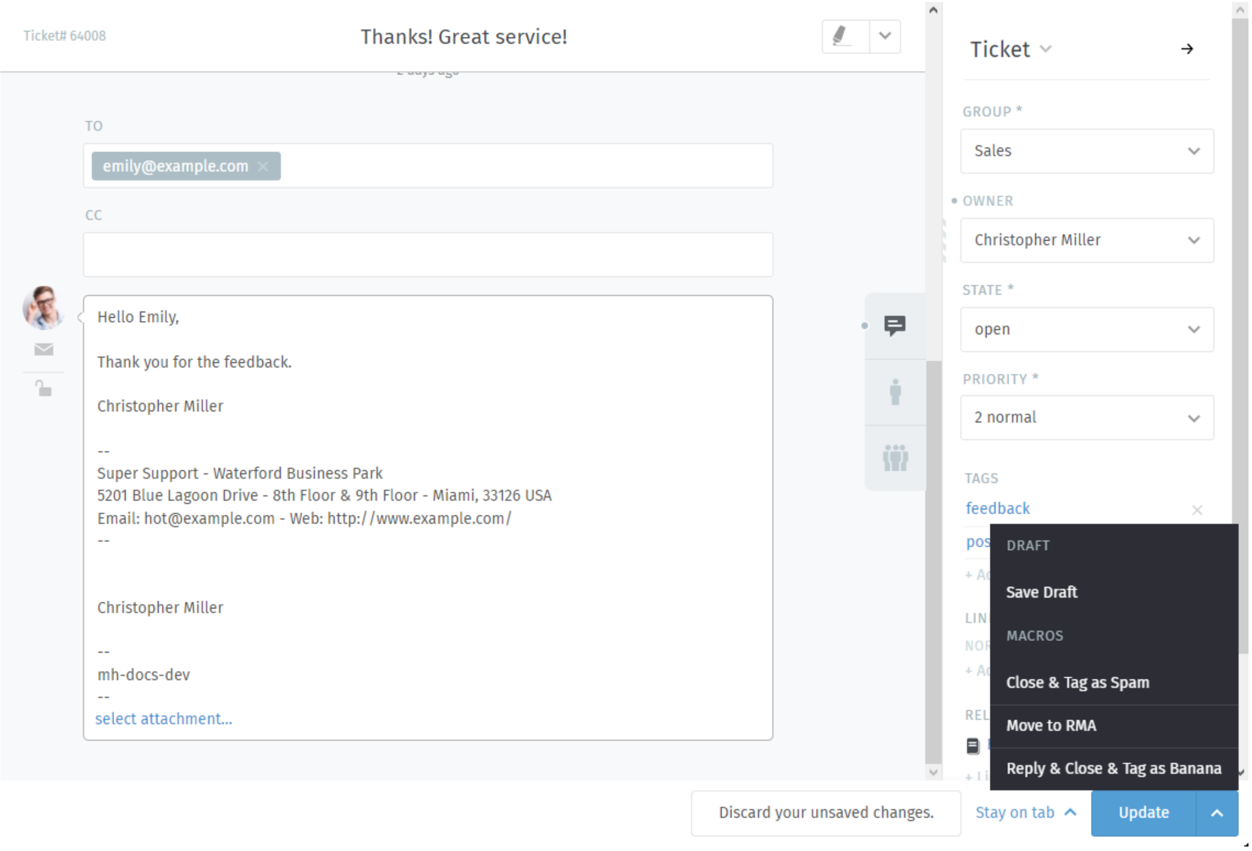
The Encrypt button is disabled Ask your administrator to add the recipient's certificate to Zammad's certificate store.

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

CHAPTER
EIGHTEEN

SHARED DRAFTS

Share drafts for new or existing tickets with other agents of your group. Load, modify and safe an existing draft e.g. as QA process with colleagues.


Ticket# 64008
Thanks! Great service!
Ticket
DRAFT
Save Draft
MACROS
Close & Tag as Spam
Move to RMA
Reply & Close & Tag as Banana
Discard your unsaved changes.
Stay on tab
Update

TO: emily@example.com

CC:

Hello Emily,

Thank you for the feedback.

Christopher Miller

--
Super Support - Waterford Business Park
5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA
Email: hot@example.com - Web: http://www.example.com/
--

Christopher Miller

--
mh-docs-dev
--
select attachment...

GROUP *: Sales

OWNER: Christopher Miller

STATE *: open

PRIORITY *: 2 normal

TAGS: feedback

Fig. 1: By using next to the "Update" button Zammad will provide you with an option to save your draft (and thus share it) if the option is enabled.

Note: Huh? I don't see "Share Draft" option…

This feature is **optional**; if you don't see it in the menu, that means your administrator disabled this function. Administrators can learn more in our admin documentation.

Hint: Let's be clear up front

Zammad technically has two draft functions:

- shared draft (allow others to load the draft), and
- user drafts.

Every time you change a tickets field, Zammad will safe this in your personal draft. You then can share this as a shared draft if you want to.
User drafts are *always* available!

18.1 Handling drafts

Note: Shared draft handling is the same for existing tickets and new tickets.

Load a draft

Loading a draft works the same starting from draft previews.

> **Warning: Overwriting drafts is final**
>
> Zammad will warn you in case you're going to overwrite an existing draft. This also applies to your personal draft in case you're loading a shared draft.

New Ticket dialogue If you're in a new ticket dialogue *after selecting the ticket group*, the button will indicate the shared drafts function to be available.

> **Note:** The shared drafts tab is *always* hidden if no group is selected!

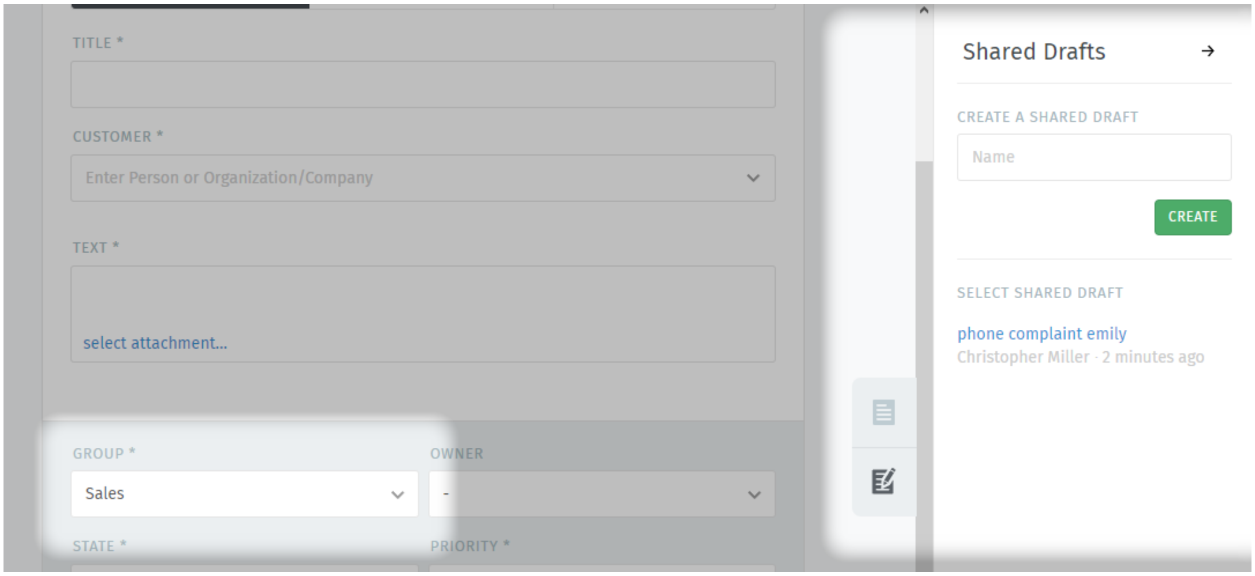
Existing tickets (Ticket zoom) Within ticket zooms a button " Draft available" will be shown if a draft has been shared by either you or another agent on the ticket.

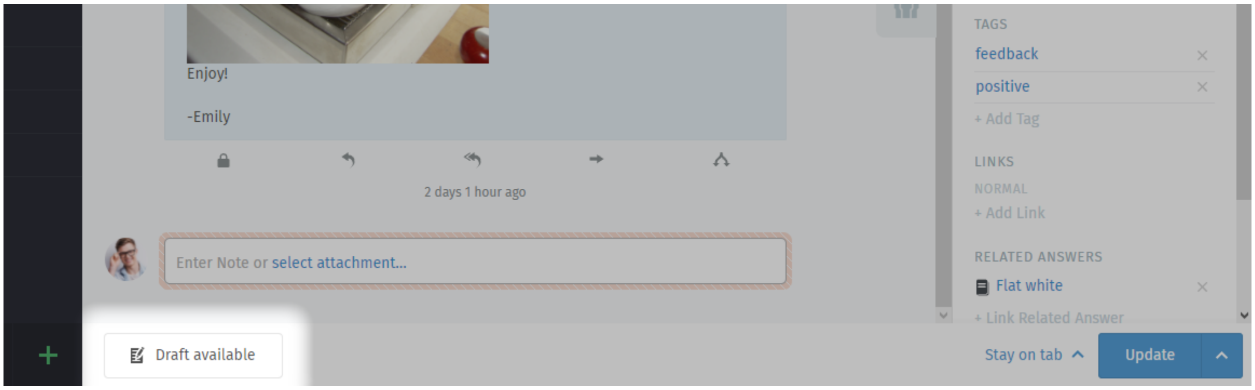
Hovering over the button will tell you who has changed the draft last.

Hint: Loading a shared draft, (adjusting and) updating the ticket with an article will cause Zammad to *remove* the shared draft.

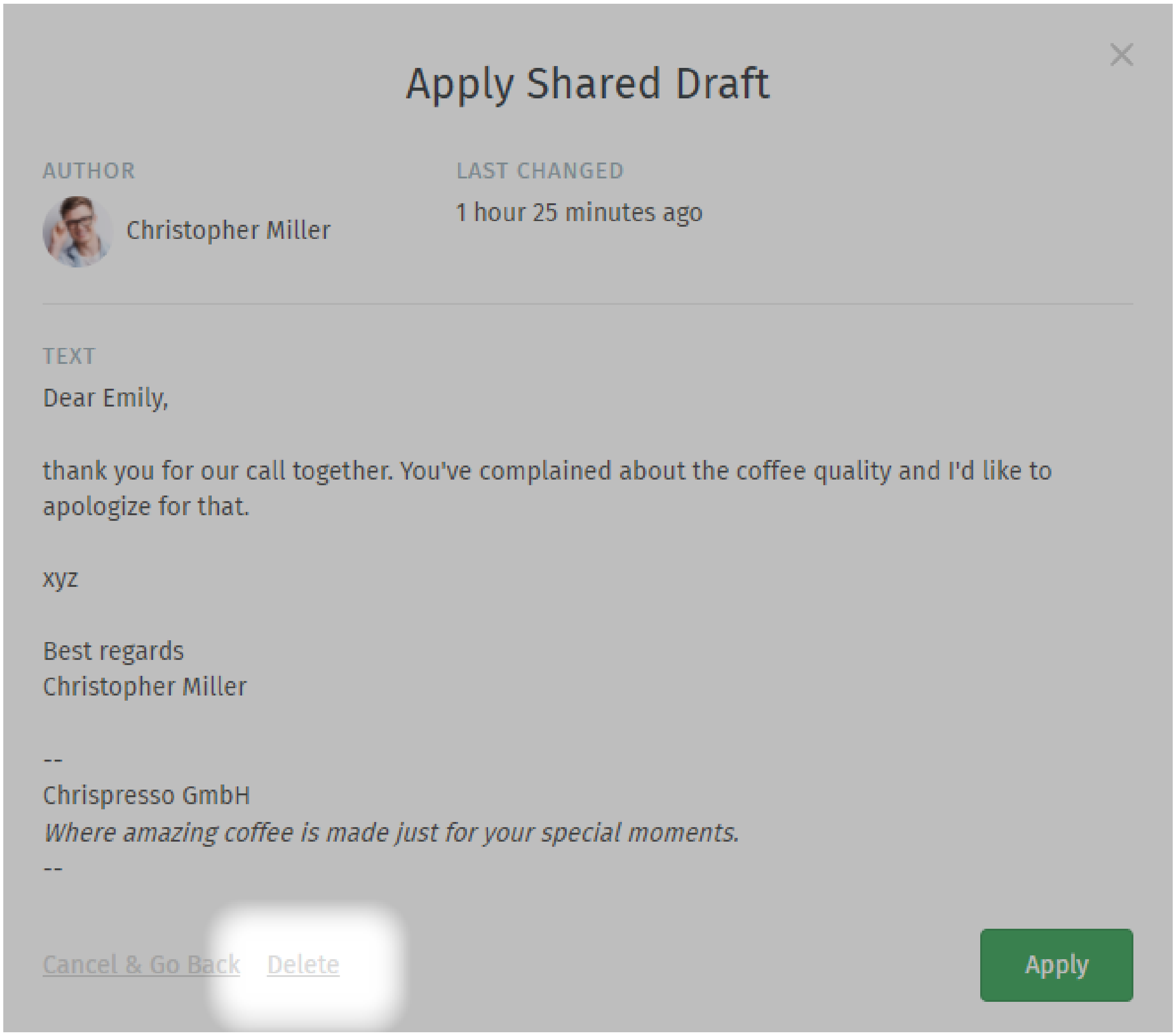
> **Warning:** This also applies if you're sharing the draft before submitting! Zammad expects that the draft is no longer needed.

Remove draft You can remove any draft (no matter if for new or existing tickets) from within the draft preview screen. Use the "Delete" link on the lower end of the dialogue.


TITLE *
CUSTOMER *
Enter Person or Organization/Company
TEXT *
select attachment...
GROUP *
Sales
OWNER
-
STATE *
PRIORITY *
Shared Drafts
CREATE A SHARED DRAFT
Name
CREATE
SELECT SHARED DRAFT
phone complaint emily
Christopher Miller · 2 minutes ago


Enjoy!
-Emily
2 days 1 hour ago
Enter Note or select attachment...
Draft available
TAGS
feedback
positive
+ Add Tag
LINKS
NORMAL
+ Add Link
RELATED ANSWERS
Flat white
+ Link Related Answer
Stay on tab
Update

Hint: This has no effect on local drafts agents may have loaded already.



Apply Shared Draft

AUTHOR
Christopher Miller

LAST CHANGED
1 hour 25 minutes ago

TEXT

Dear Emily,

thank you for our call together. You've complained about the coffee quality and I'd like to apologize for that.

xyz

Best regards
Christopher Miller

--
Chrispresso GmbH
Where amazing coffee is made just for your special moments.
--

18.2 Saving drafts

Warning: Overwriting drafts is final

Zammad will warn you in case you're going to overwrite an existing draft. This also applies to your personal draft in case you're loading a shared draft.

New ticket

Adding new drafts To save a new shared draft, set the ticket settings, customer, ticket title and article as desired. Make sure to select a group that supports shared drafts.

If you're ready to save the draft, click on on the right ticket pane, enter a meaning full name and click on the "Create" button.

Update existing drafts In order to update or rename existing shared drafts for new tickets, simply load the draft in question. Change the information (e.g. ticket settings or content) needed and, if needed, update the drafts name on the right hand side of the ticket.

Tip: This way you can not just update existing drafts, but also use existing drafts to create another copy!

Existing ticket Use the button next to the update button. If the group of the ticket (or in your selection) allows shared drafts, Zammad will provide the option "Save Draft".

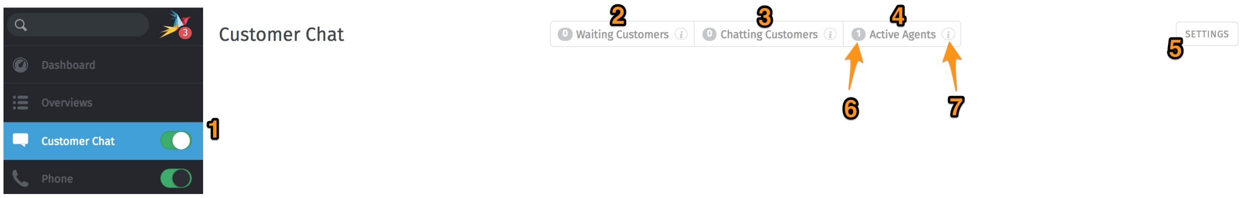
All current changes on the ticket (ticket settings, article and it's attachments) will be saved to the shared draft.

When saving was successful, the button " Draft available" will be shown.

CHAPTER NINETEEN

LIVE CHAT

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


Dashboard
Overviews
Customer Chat
Phone
1
Customer Chat
2
0 Waiting Customers
3
0 Chatting Customers
4
1 Active Agents
6
7
SETTINGS
5

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…

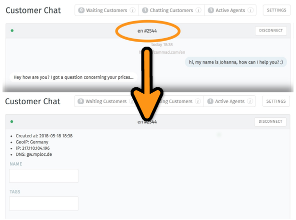
This feature is **optional**; if you don't see it in the main menu, that means your administrator hasn't enabled it yet. Administrators can learn more here.

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.


Customer Chat
0 Waiting Customers
1 Chatting Customers
1 Active Agents
SETTINGS
en #2544
DISCONNECT
today 18:38
zammad.com/en
NAME
TAGS

hi, my name is Johanna, how can I help you? :)

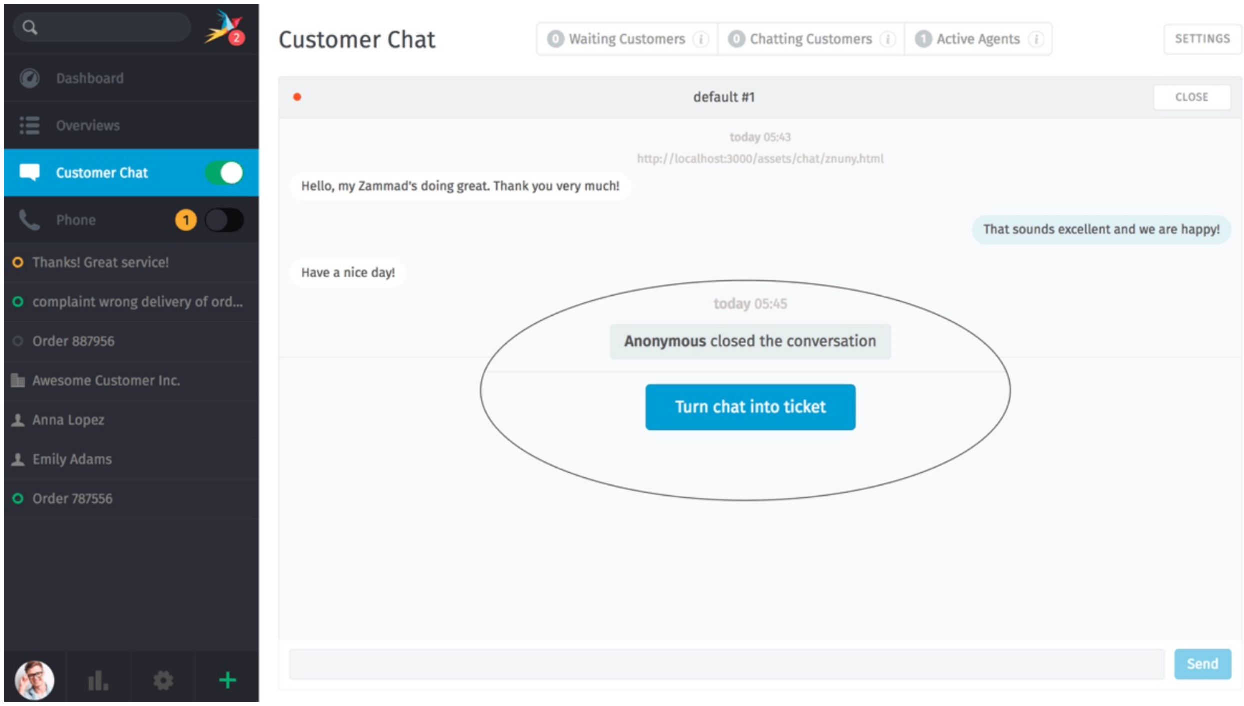
Hey how are you? I got a question concerning your prices...

- Created at: 2018-05-18 18:38
- GeoIP: Germany
- IP: 217.110.104.196
- DNS: gw.mploc.de

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

19.1 Creating a Ticket from a Chat

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


Dashboard
Overviews
Customer Chat
Phone
1
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
Customer Chat
0 Waiting Customers
0 Chatting Customers
1 Active Agents
SETTINGS
default #1
CLOSE
today 05:43
http://localhost:3000/assets/chat/znuny.html
today 05:45
Turn chat into ticket
Send

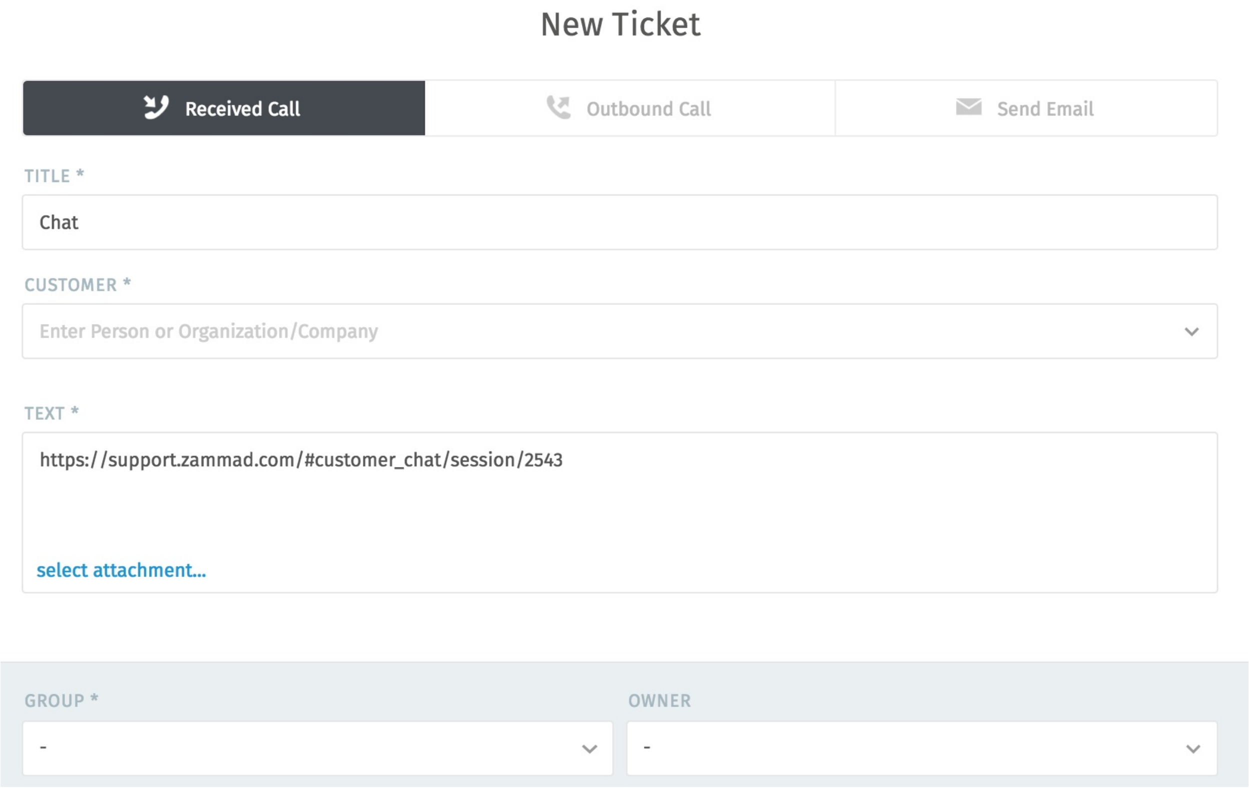
Hello, my Zammad's doing great. Thank you very much!

That sounds excellent and we are happy!

Have a nice day!

Anonymous closed the conversation

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


New Ticket
Received Call
Outbound Call
Send Email

TITLE *

Chat

CUSTOMER *

Enter Person or Organization/Company

TEXT *

https://support.zammad.com/#customer_chat/session/2543

select attachment...

GROUP *

-

OWNER

-

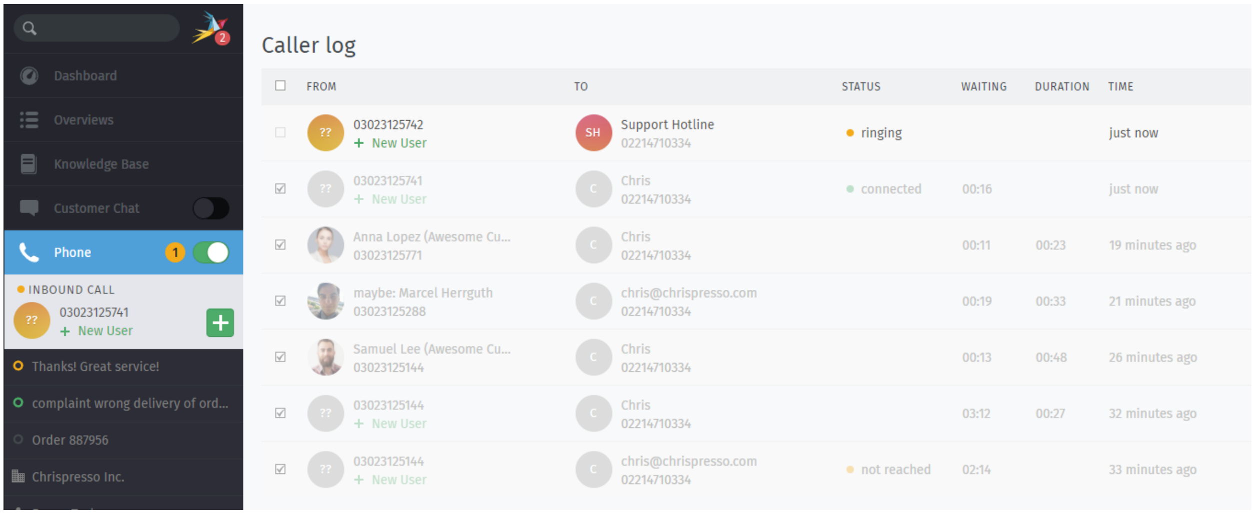
Fig. 3: A link to the chat is automatically included in the first note on the ticket.

CHAPTER

TWENTY

CALLER LOG

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


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
INBOUND CALL
03023125741
New User
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Chrispresso Inc.

Caller log

☐	FROM	TO	STATUS	WAITING	DURATION	TIME
☐	03023125742 + New User	Support Hotline 02214710334	● ringing			just now
☑	03023125741 + New User	Chris 02214710334	● connected	00:16		just now
☑	Anna Lopez (Awesome Cu... 03023125771	Chris 02214710334		00:11	00:23	19 minutes ago
☑	maybe: Marcel Herrguth 03023125288	chris@chrispresso.com 02214710334		00:19	00:33	21 minutes ago
☑	Samuel Lee (Awesome Cu... 03023125144	Chris 02214710334		00:13	00:48	26 minutes ago
☑	03023125144 + New User	Chris 02214710334		03:12	00:27	32 minutes ago
☑	03023125144 + New User	chris@chrispresso.com 02214710334	● not reached	02:14		33 minutes ago

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 on our admin documentation.

Hint: The caller log shows all incoming and outgoing calls **for the entire instance**. The number of entries shown depends on the configuration your admin chose.

The caller log offers a lot more than just the last call entries. If your administrator configured "Phone Extension to Agent Mapping", Zammad will also help you during answering calls.

New Ticket dialogue Zammad will open a new ticket dialogue if:

- it's able to either guess a single user (see *maybe entries*)
- the callers number belongs to a user known to Zammad
- the callers number is yet unknown

If the user is known to Zammad it will automatically set the ticket customer for you. You can correct this at any time if needed.

User profile Zammad will open the users profile if your user had a customer ticket that has been updated within the last 30 days. This also applies for calling users that Zammad guesses are a specific user (only if it's one guessed user).

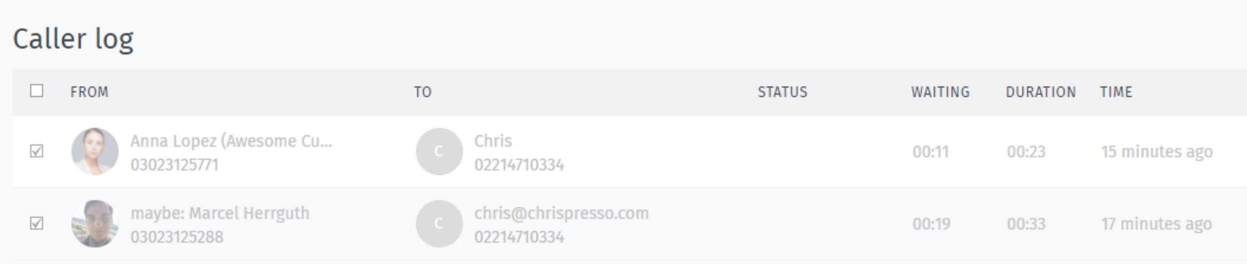
Quick dial You can click on phone numbers (user profiles and caller log) to dial the number in question quickly.

> **Note:** This requires either a soft phone client or CTI client on your computer that supports this action.

Note: What are these "maybe" entries?

During your day by day communication you may also stumble over new customers. Usually business users send their phone numbers in their signature.

Zammad collects and aggregates these information and tries to guess the customer in case it receives a call from an unknown number.



Caller log

☐	FROM	TO	STATUS	WAITING	DURATION	TIME
☑	Anna Lopez (Awesome Cu... 03023125771	Chris 02214710334		00:11	00:23	15 minutes ago
☑	maybe: Marcel Herrguth 03023125288	chris@chrispresso.com 02214710334		00:19	00:33	17 minutes ago

---

Tip: Click on unrecognized numbers to **create a new customer** or maybe entries to **update an existing customer**.

(Unrecognized phone numbers cannot be added to existing customers in this way. Copy and pasting is required.)

> **Note:** Existing caller log entries *are not* updated.

CHAPTER TWENTYONE

PROFILE & SETTINGS

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

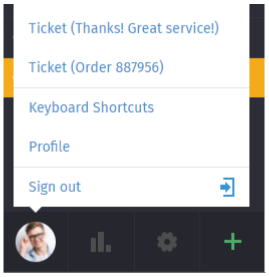


Fig. 1: Find user-specific actions, a list of recently opened items, and useful reference information.

21.1 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.

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

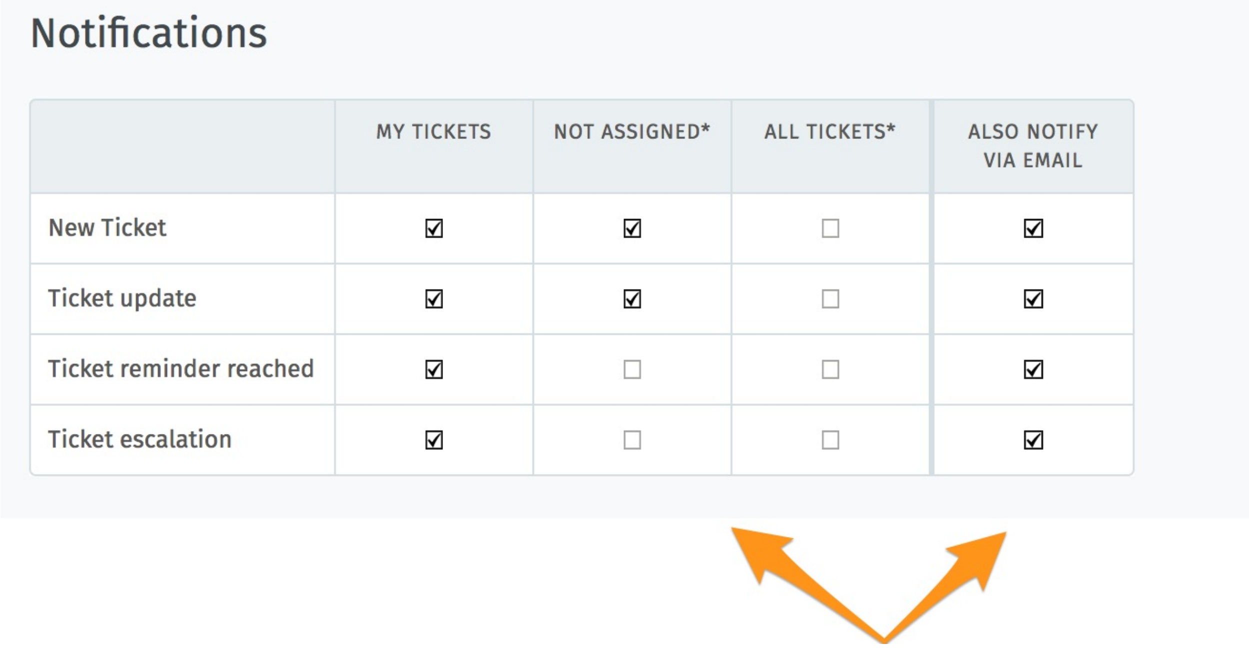
Out of Office Schedule out-of-office periods in advance, and designate a substitute to handle your tickets while you're gone.

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).



Notifications

	MY TICKETS	NOT ASSIGNED*	ALL TICKETS*	ALSO NOTIFY VIA EMAIL
New Ticket	☑	☑	☐	☑
Ticket update	☑	☑	☐	☑
Ticket reminder reached	☑	☐	☐	☑
Ticket escalation	☑	☐	☐	☑

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

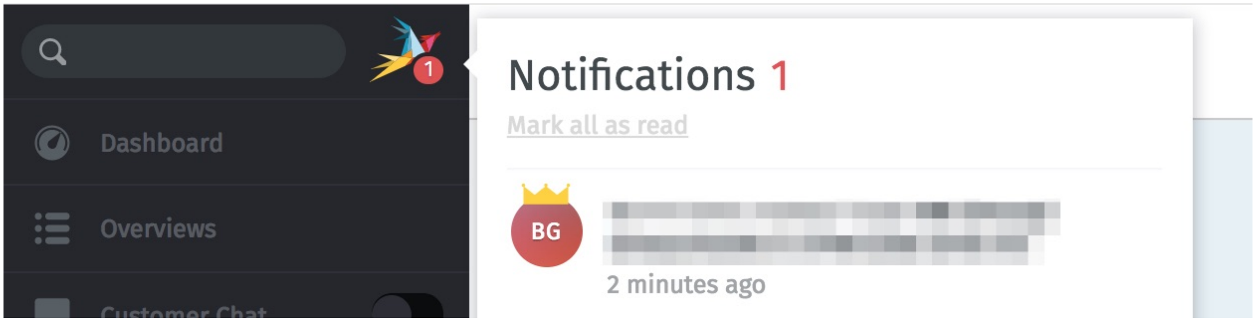
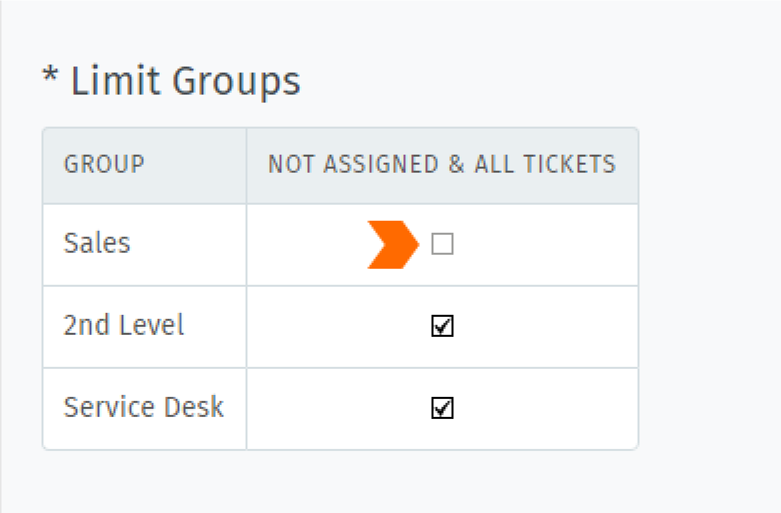

1
Dashboard
Overviews
Customer Chat
Notifications 1
Mark all as read
BG
2 minutes ago

Fig. 3: Internal notifications cannot be disabled.



* Limit Groups

GROUP	NOT ASSIGNED & ALL TICKETS
Sales	☐
2nd Level	☑
Service Desk	☑

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.)

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 TWENTYTWO

KNOWLEDGE BASE

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

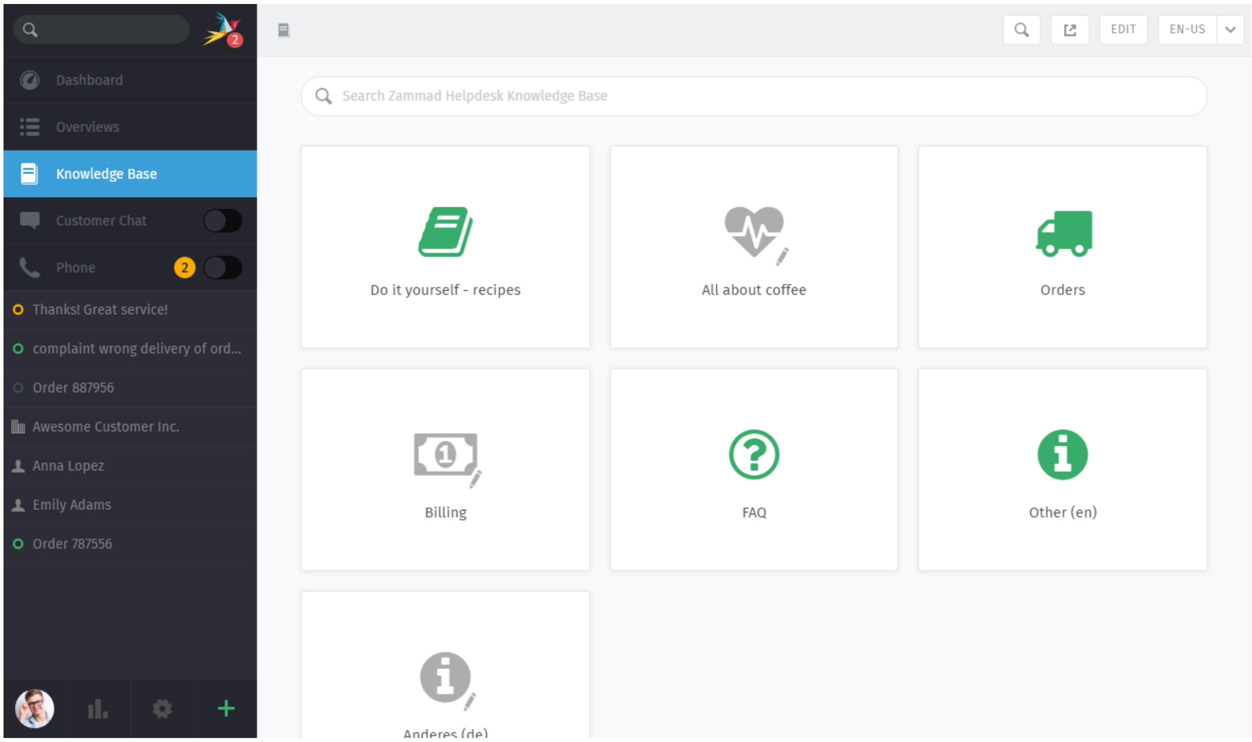
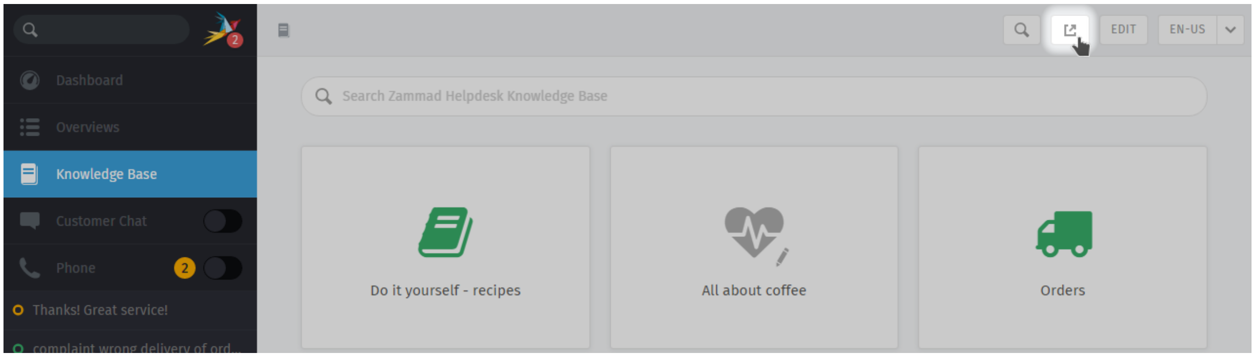

2
Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
EDIT
EN-US
Search Zammad Helpdesk Knowledge Base
Do it yourself - recipes
All about coffee
Orders
Billing
FAQ
Other (en)
Anderes (de)

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.

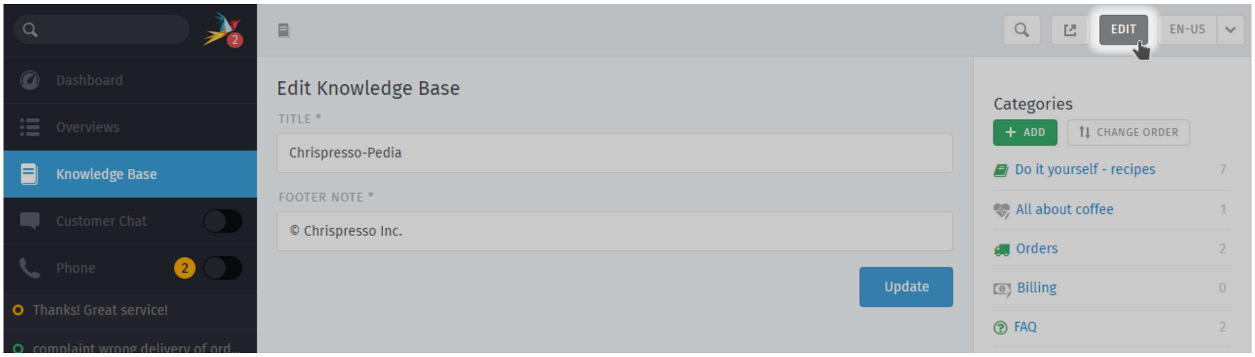
Note: Huh? I don't see "Knowledge Base" in the menu…

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 on our admin documentation.

22.1 Getting Started


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
EDIT
EN-US
Search Zammad Helpdesk Knowledge Base
Do it yourself - recipes
All about coffee
Orders

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


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
EDIT
EN-US
Edit Knowledge Base
Update
Categories
+ ADD
CHANGE ORDER
Do it yourself - recipes 7
All about coffee 1
Orders 2
Billing 0
FAQ 2

TITLE *: Chrispresso-Pedia

FOOTER NOTE *: © Chrispresso Inc.

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…

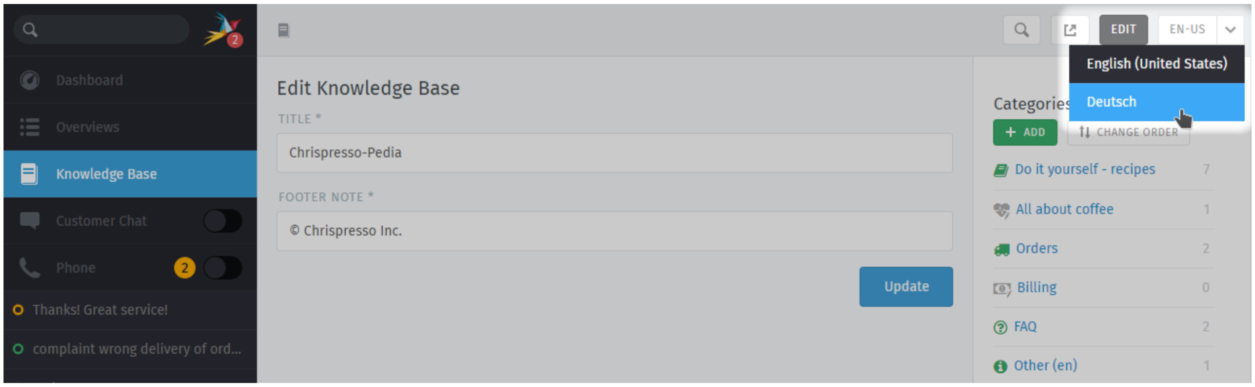
By default, agents are **not permitted to create, edit, or manage knowledge base articles**. If you wish to edit the knowledge base, talk to your administrator about granting you the appropriate permissions.

22.1.1 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**:

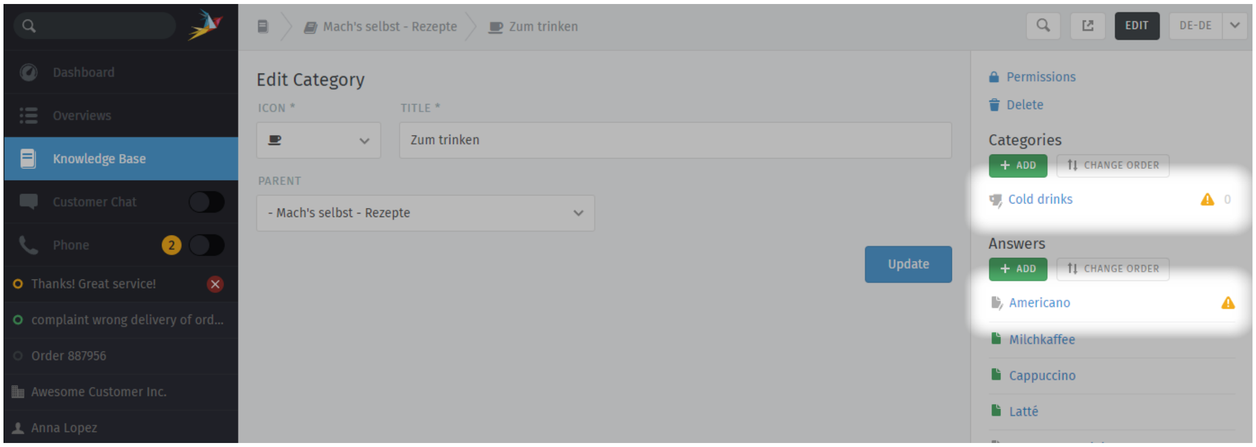


Edit Knowledge Base

TITLE * Chrispresso-Pedia

FOOTER NOTE * © Chrispresso Inc.

Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Update
EDIT
EN-US
English (United States)
Deutsch
Categories
ADD
CHANGE ORDER
Do it yourself - recipes
7
All about coffee
1
Orders
2
Billing
0
FAQ
2
Other (en)
1



Edit Category

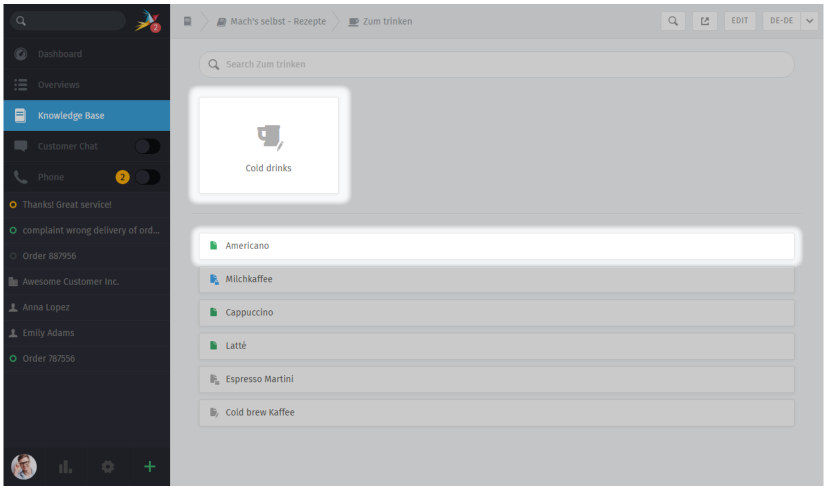
ICON *

TITLE * Zum trinken

PARENT - Mach's selbst - Rezepte

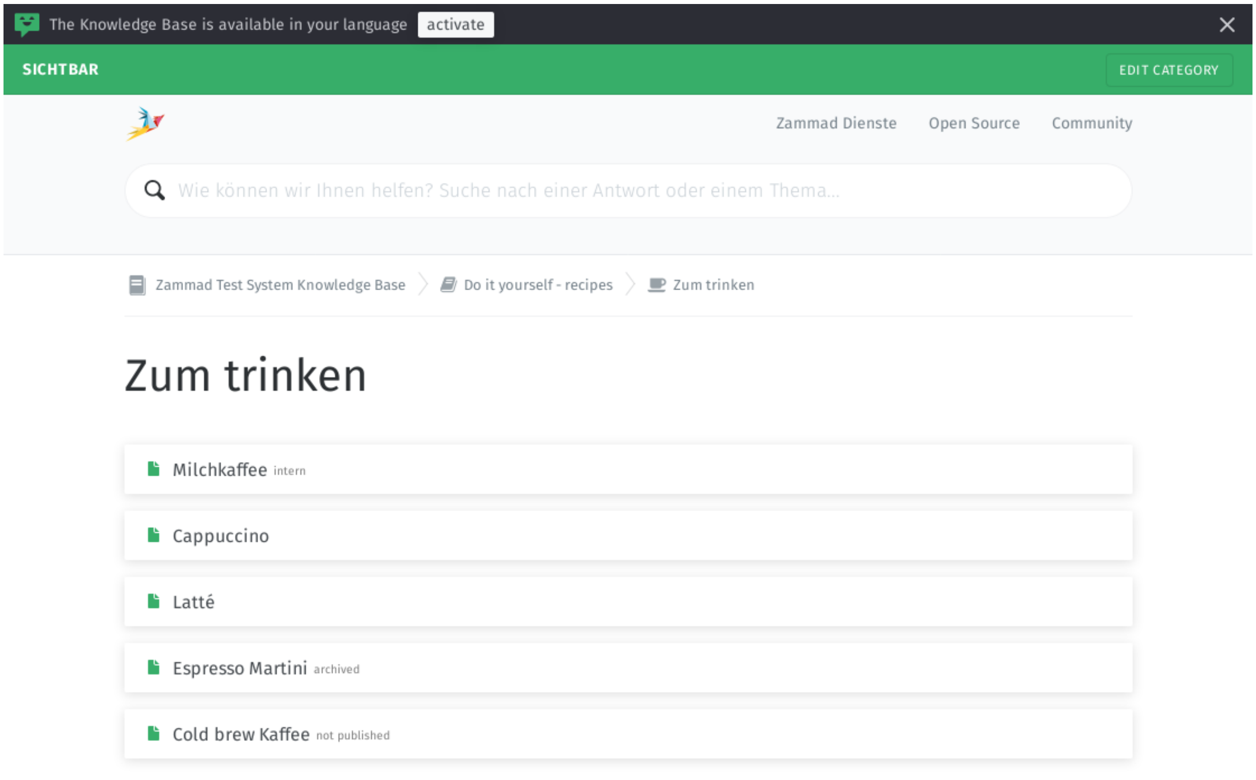
Mach's selbst - Rezepte
Zum trinken
EDIT
DE-DE
Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Update
Permissions
Delete
Categories
ADD
CHANGE ORDER
Cold drinks
0
Answers
ADD
CHANGE ORDER
Americano
Milchkaffee
Cappuccino
Latté

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



Mach's selbst - Rezepte
Zum trinken
EDIT
DE-DE
Search Zum trinken
Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
Cold drinks
Americano
Milchkaffee
Cappuccino
Latté
Espresso Martini
Cold brew Kaffee

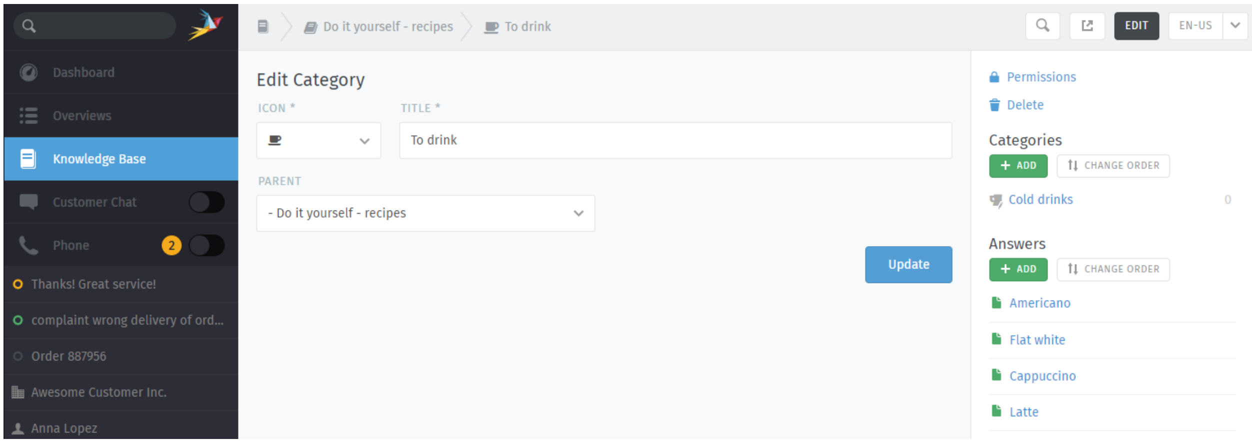
in the published knowledge base Untranslated pages are **always hidden**:



The Knowledge Base is available in your language

activate
SICHTBAR
EDIT CATEGORY
Zammad Dienste
Open Source
Community
Wie können wir Ihnen helfen? Suche nach einer Antwort oder einem Thema...
Zammad Test System Knowledge Base
Do it yourself - recipes
Zum trinken
Zum trinken
Milchkaffee intern
Cappuccino
Latté
Espresso Martini archived
Cold brew Kaffee not published

22.2 Editing Categories



Edit Category

ICON *

TITLE * To drink

PARENT - Do it yourself - recipes

Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Do it yourself - recipes
To drink
EDIT
EN-US
Update
Permissions
Delete
Categories
+ ADD
CHANGE ORDER
Cold drinks
0
Answers
+ ADD
CHANGE ORDER
Americano
Flat white
Cappuccino
Latte

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.

22.2.1 Granular Category Permissions

Granular category permissions are great to have individual access levels on a role level. Using the granular permissions of a category deactivates the default visibility behavior and applies the permissions you've chosen instead.

This allows you to divide user groups on a e.g. subscription level to reduce the information load for users that don't need the information.

Hint:

Permissions of a parent category are inherited!
Public answers are always available!

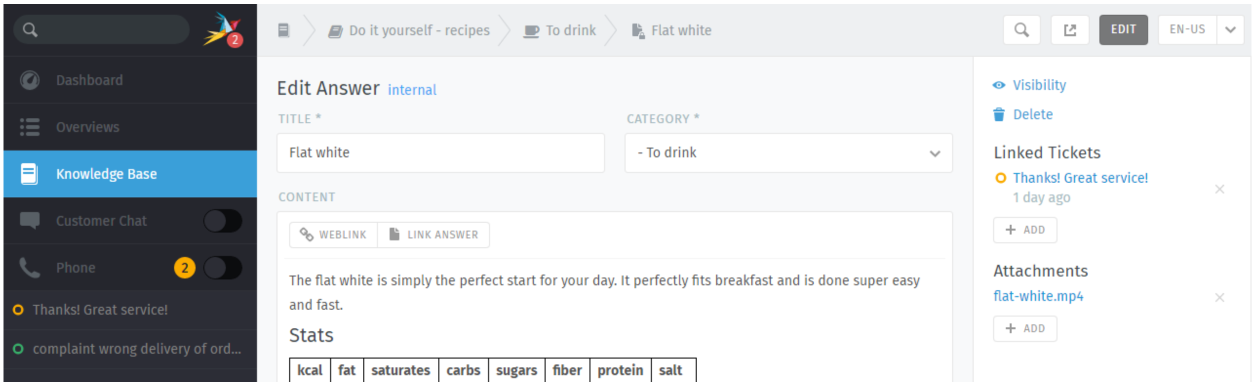
Note: Roles require knowledge base reader permission

Your administrator has to provide the relevant groups with reader permissions for the knowledge base.

> **Danger: Beware of visibility levels**
>
> Knowledge base reader permission means that affected users can see **internal answers**. This is a potential issue if you're not dividing carefully!

If you're unsure, please ask your administrator to configure the role permissions accordingly.

22.3 Editing Answers


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Do it yourself - recipes
To drink
Flat white
EDIT
EN-US
Visibility
Delete
Linked Tickets
Thanks! Great service!
1 day ago
+ ADD
Attachments
flat-white.mp4
+ ADD
WEBLINK
LINK ANSWER

Edit Answer internal

TITLE *: Flat white

CATEGORY *: - To drink

CONTENT

The flat white is simply the perfect start for your day. It perfectly fits breakfast and is done super easy and fast.

Stats

kcal	fat	saturates	carbs	sugars	fiber	protein	salt

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 four 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.)

Tags

Tags can help categorize or spice answers with further words to find.
Please note that tags are visible publicly and can be the same like those in your tickets.

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)

22.4 Using answers in ticket articles

As soon as the knowledge base contains one or more answers, you can use these just like text modules. Instead of `::` just use `??` to open the search modal. The search is done full text on both answer body and title in all languages available.

If you've found what you've been looking for, simply hit your ENTER-Key to load the answer into the ticket article. This way you don't have to throw URLs at your customer and provide the answer right away.

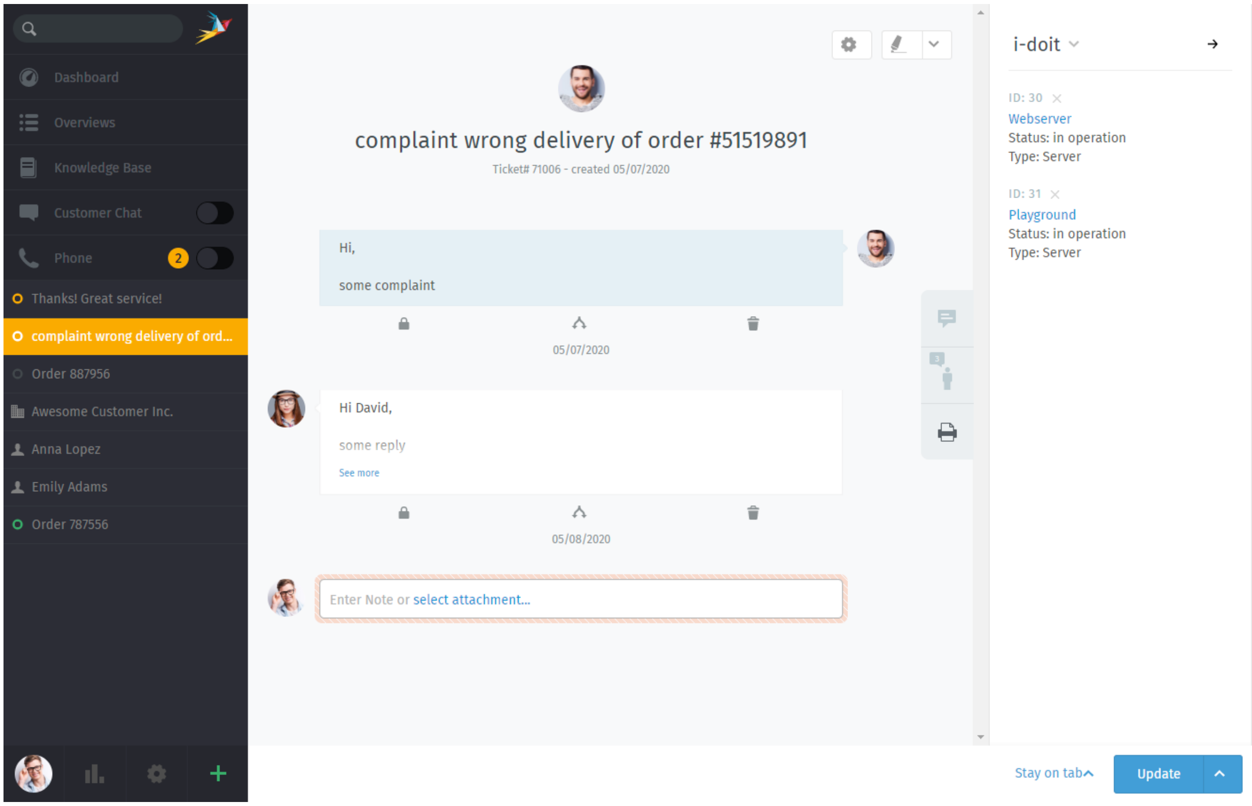
Loading answers into articles *does not* replace article content.

Fig. 3: Use `??` to find and load knowledge base answers into ticket articles

CHAPTER TWENTYTHREE

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.


Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
i-doit
Stay on tab
Update

complaint wrong delivery of order #51519891

Ticket# 71006 - created 05/07/2020

Hi,

some complaint

05/07/2020

Hi David,

some reply

See more

05/08/2020

Enter Note or select attachment...

ID: 30
Webserver
Status: in operation
Type: Server

ID: 31
Playground
Status: in operation
Type: Server

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.

23.1 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?

23.2 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.)

23.2.1 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.

23.2.2 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.

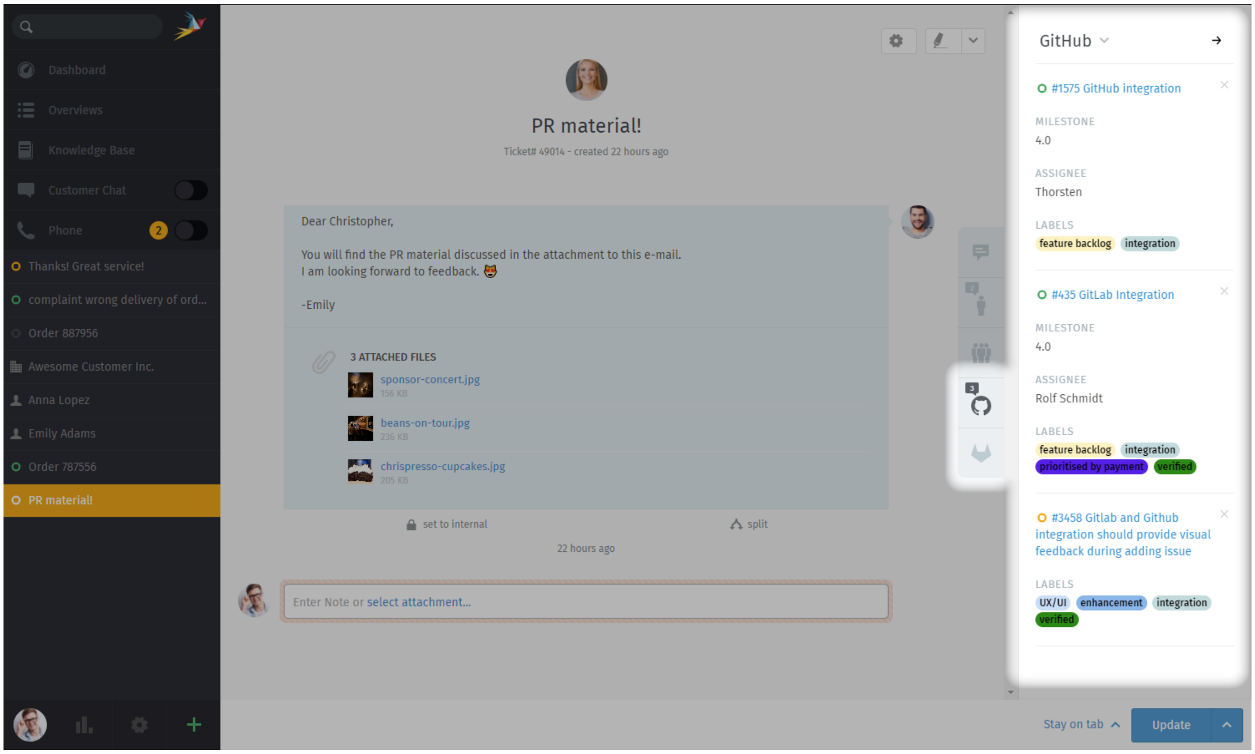
CHAPTER
TWENTYFOUR

GITHUB / GITLAB INTEGRATION

With issue tracker integration, you can monitor GitHub / GitLab issues right from within a Zammad ticket.

Note: Huh? I don't see or tabs…

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



Dashboard
Overviews
Knowledge Base
Customer Chat
Phone
2
Thanks! Great service!
complaint wrong delivery of ord...
Order 887956
Awesome Customer Inc.
Anna Lopez
Emily Adams
Order 787556
PR material!
PR material!
Ticket# 49014 - created 22 hours ago
3 ATTACHED FILES
sponsor-concert.jpg
beans-on-tour.jpg
chrispresso-cupcakes.jpg
set to internal
split
22 hours ago
Enter Note or select attachment...
GitHub
#1575 GitHub integration
MILESTONE
4.0
ASSIGNEE
Thorsten
LABELS
feature backlog
integration
#435 GitLab Integration
MILESTONE
4.0
ASSIGNEE
Rolf Schmidt
LABELS
feature backlog
integration
prioritised by payment
verified
#3458 Gitlab and Github integration should provide visual feedback during adding issue
LABELS
UX/UI
enhancement
integration
verified
Stay on tab
Update

Dear Christopher,

You will find the PR material discussed in the attachment to this e-mail.
I am looking forward to feedback.

-Emily

Fig. 1: Use the and tabs on the ticket pane for an overview of issues related to the ticket.

24.1 What can it do?

View related issues Use the and tabs on the ticket pane to see linked issues, along with metadata like status (open/closed), assignee, labels, and more. Or, simply click the title to view the issue on GitHub / GitLab.

A badge on the tab icon indicates how many issues are linked to this ticket.

Link a new issue At the top of the ticket pane, select **GitHub / GitLab > Link Issue**, then enter a valid issue URL.

Note: Linking a new issue can be slow sometimes.

Remove an issue Click the × button next to an issue title to unlink it.