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# **Zammad (for Agents)**

**The Zammad Foundation**

**06 jun. 2023**



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## Zammad Glossary

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

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

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**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](#)

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### 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!](#)

**Cliente** 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.

**Fluxos de Trabalho** 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 *Verificando suas estatísticas*.

**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!

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**Nota:** This affects hosted environments only!

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

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### 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.

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#### **Dica:** Self Hosted users

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

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[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: [Integração GitHub / GitLab](#).

**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: [Integração GitHub / GitLab](#).

## 1.8 H

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## 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.

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**Dica:** This does not apply to SaaS Zammad instances.

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[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

**Proprietário** 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: [Configurações dos chamados](#)

**Organização** 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: [Associando chamados](#).

**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: [Registro de Ligações](#)

**Prioridade** 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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## 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.

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**Dica:** Self Hosted users can also use Kerberos authentication.

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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: [Registro de Ligações](#)

**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: [Estado](#)

## 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: [Trabalhando com Módulos de Texto](#)

**(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: [Modelos de chamados](#).

**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

**Usuário** 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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## 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.



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### O que é um chamado?

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No Zammad, **chamados** são usados para rastrear as solicitações do serviço de atendimento ao cliente. A primeira vez que um cliente envia um e-mail para você (ou a sua empresa) sobre qualquer coisa, o Zammad irá criar um novo chamado. Cada mensagem trocada entre você e o seu cliente será adicionada ao chamado até que a situação seja resolvida, o cliente esteja feliz e o chamado é, então, **fechado**.

Então, basicamente, um chamado é um **fluxo de mensagens entre você e um cliente acerca de um assunto**.

---

**Dica:** Você sabe que está fazendo um ótimo trabalho quando 1) responde os chamados com rapidez e 2) encerra os chamados no tempo esperado.

*Fique de olho no seu [dashboard](#) para acompanhar quão bem está a sua performance.*

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## 2.1 Configurações dos chamados

Chamados também possuem metadados anexados para deixar mais fácil a tarefa de gerenciá-los. Por exemplo, chamados possuem um cliente e (opcionalmente) um agente; eles podem estar abertos ou fechados (ou mesmo adiados para depois); eles podem ser organizados em grupos; eles podem, até mesmo, serem sinalizados quanto a prioridade alta ou baixa.

Por uma questão de simplicidade, nos referiremos a esses metadados como as **configurações** de um chamado. Todas essas configurações podem ser alteradas a qualquer momento. Cada configuração é explicada em detalhes na [aqui](#), mas, por enquanto, vamos examinar as duas mais importantes:

**Proprietário (opcional)** O agente atualmente atribuído ao chamado (ou seja, responsável por ele).

**Estado** O cliente ainda está esperando por uma resposta (**aberto**) ou o chamado já foi resolvido (**fechado**)?

---

**Nota:** Veja também

Para uma discussão mais aprofundada sobre cada configuração dos chamados, acesse os artigos abaixo:

- [Proprietário](#)

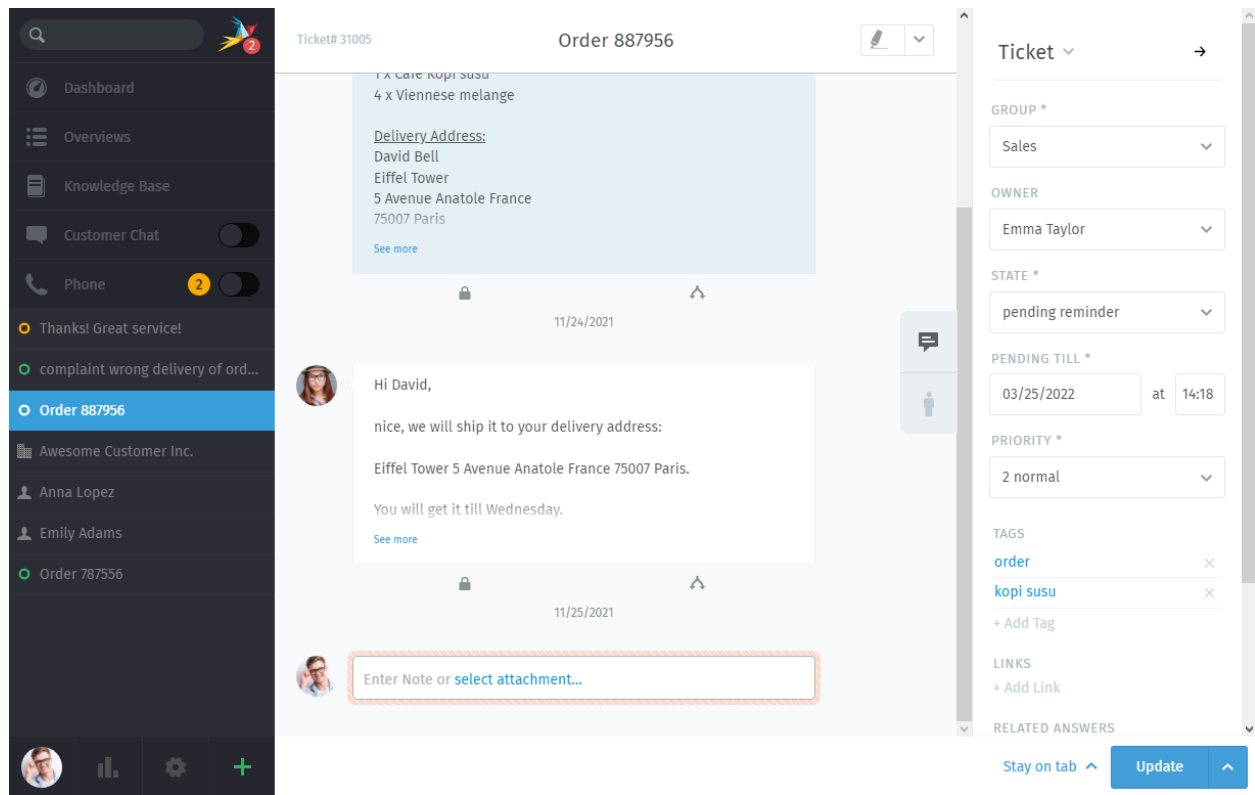


Fig. 1: Um chamado é um fluxo de mensagens entre o cliente e um agente.

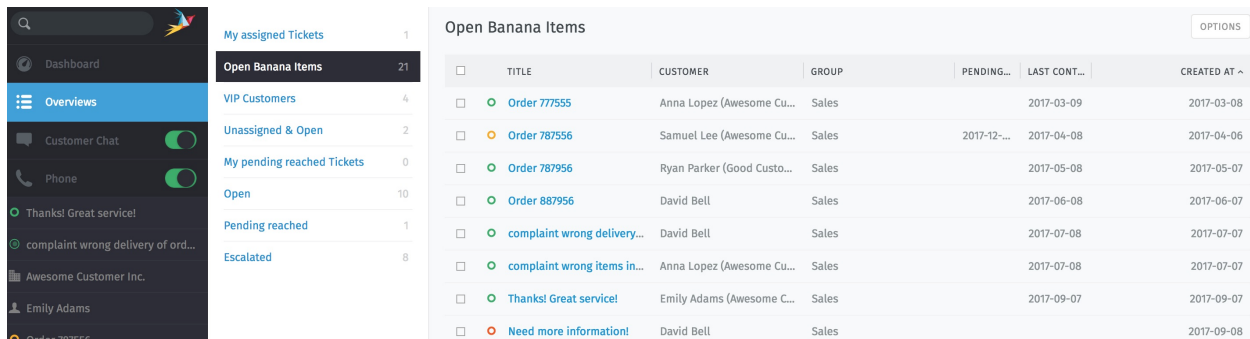
- *Situação*
- *Grupo*
- *Prioridade*
- *Rótulos*

## Encontrando chamados

Se você planeja trabalhar nos chamados, será melhor aprender como encontrá-los primeiro. Continue lendo para aprender como verificar por chamados novos e encontrar os antigos.

### 3.1 Navegar pelos chamados

Procurando por um chamado para resolver? Dê uma olhada na aba **Visões** no menu.



The screenshot shows the Zammad admin interface. On the left is a sidebar menu with options like Dashboard, Overviews, Customer Chat, Phone, and a list of users. The 'Overviews' section is highlighted. The main content area displays a table titled 'Open Banana Items' with columns for Title, Customer, Group, Pending status, Last Contact, and Created At. The table lists several items, including 'Order 777555', 'Order 787556', 'Order 787956', 'Order 887956', and 'complaint wrong delivery...'. Each item has a checkbox and a status indicator (green or orange).

TITLE	CUSTOMER	GROUP	PENDING...	LAST CONT...	CREATED AT ^
<input type="checkbox"/> <span style="color: green;">●</span> Order 777555	Anna Lopez (Awesome Cu...	Sales		2017-03-09	2017-03-08
<input type="checkbox"/> <span style="color: orange;">●</span> Order 787556	Samuel Lee (Awesome Cu...	Sales	2017-12-...	2017-04-08	2017-04-06
<input type="checkbox"/> <span style="color: green;">●</span> Order 787956	Ryan Parker (Good Cust...	Sales		2017-05-08	2017-05-07
<input type="checkbox"/> <span style="color: green;">●</span> Order 887956	David Bell	Sales		2017-06-08	2017-06-07
<input type="checkbox"/> <span style="color: green;">●</span> complaint wrong delivery...	David Bell	Sales		2017-07-08	2017-07-07
<input type="checkbox"/> <span style="color: green;">●</span> complaint wrong items in...	Anna Lopez (Awesome Cu...	Sales		2017-07-08	2017-07-07
<input type="checkbox"/> <span style="color: green;">●</span> Thanks! Great service!	Emily Adams (Awesome C...	Sales		2017-09-07	2017-09-07
<input type="checkbox"/> <span style="color: orange;">●</span> Need more information!	David Bell	Sales			2017-09-08

Fig. 1: Clique na aba **Visões** no menu para procurar por chamados.

**Dica:** Pense nas visões como **caixas de entrada**, cada uma exibindo um conjunto de chamados de acordo com filtros diferentes.

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

- **Meus chamados** (*apenas chamados atribuídos abertos ou suspensos*)
- **Não atribuídos e abertos**
- **Meus chamados suspensos vencidos** (chamados marcados como suspensos e atualmente vencidos)

- **Abertos** (todos os chamados abertos do sistema)
- **Chamados suspensos vencidos** (todos os chamados *suspensos* do sistema e atualmente vencidos)
- **Escalated** (system-wide, failing to meet a [service-level agreement](#))

---

### Dica: Dica profissional da interface de usuário

- Clique no cabeçalho das colunas para alterar a ordenação exibida.
- Clique e arraste os divisores das colunas para ajustar a sua largura.
- *As situações dos chamados* são **representadas por cores**:

	<b>Fechado</b>
	<b>Merged</b>
	<b>Adiado</b> (marcado como suspenso; nenhuma ação imediata é requerida)
	<b>Novo / Aberto</b> (pronto para ação)
	<b>Escalonado</b> (demanda ação imediata)

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

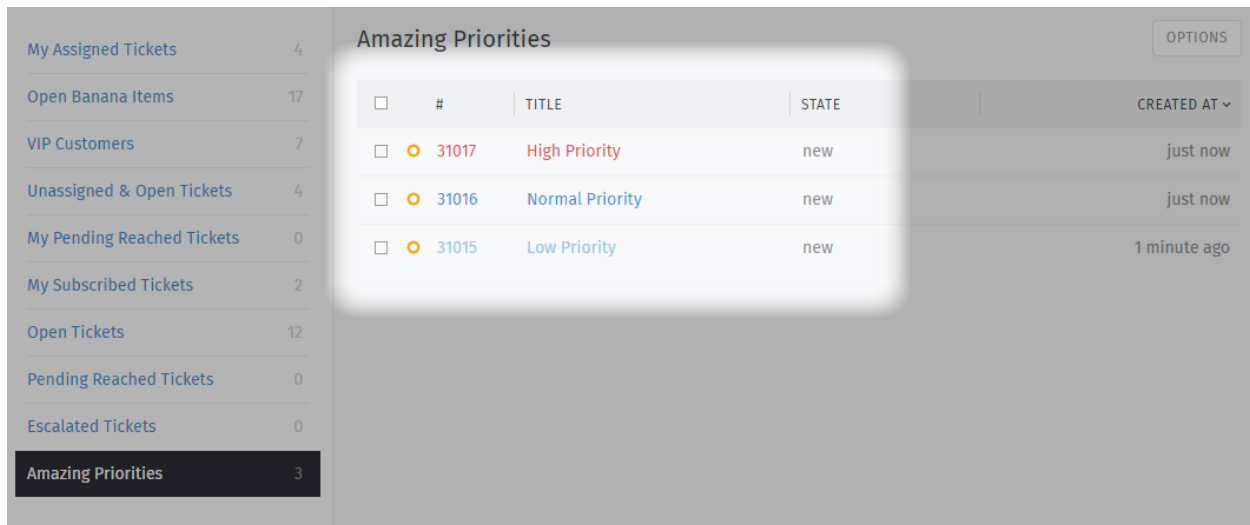


Fig. 2: Zammad's 3 default priorities allow you to see the importance of your tickets better.

## 3.2 Pesquisar por chamados

Procurando por um chamado arquivado? Utilize a **barra de pesquisa**.

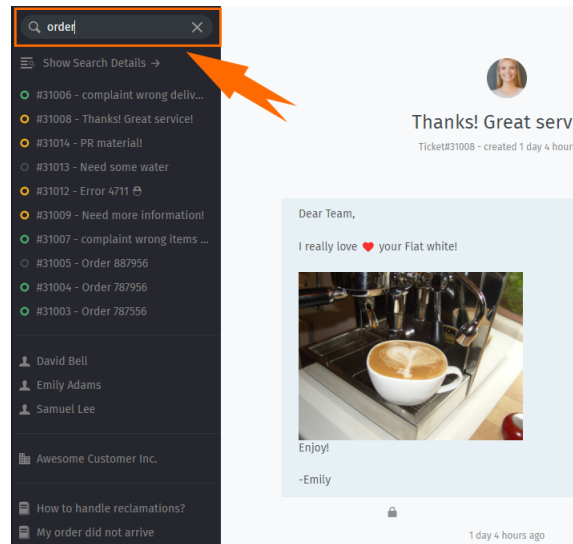


Fig. 3: Os resultados aparecem imediatamente abaixo da barra de pesquisa assim que começa a digitar.

**Dica:** E não encontra apenas chamados! Os resultados incluem **registros de bate-papo**, **clientes**, e **organizações**, também.

**\*\*** Aqui está uma lista de alguns dos lugares em que o motor de pesquisa irá pesquisar:\*

- assunto e conteúdo das mensagens
- nomes de destinatários e endereços de e-mail
- texto no interior de arquivos (é verdade!)
- metadados dos usuários e organizações (por exemplo, as notas armazenadas nos perfis dos clientes)

Você pode encontrar um documento detalhado sobre a pesquisa em nossa página sobre [Pesquisa Avançada](#).

**Dica:** **Dica profissional da interface de usuário**

Clique no cabeçalho das colunas para alterar a ordenação exibida.

Q

order

X

Knowledge Base Answer2

User3

Ticket11

Organization1

ChatSession0


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

Fig. 4: Para resultados detalhados, clique no link **\*\*Mostrar detalhes da pesquisa\*\*** acima da lista de resultados.

---

### Manipulando chamados

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Aqui é onde você gastará a maior parte do seu tempo no Zammad.

Uma vez que você pegar o jeito com as tarefas abaixo, não haverá muito mais o que fazer.

#### 4.1 Criando chamados

Zammad procura fazer o melhor para criar chamados automaticamente quando uma nova demanda de um cliente aparece. Porém, às vezes, não há como o Zammad saber quando uma nova demanda acontece - como quando um cliente liga para você.

Nestes casos, Zammad precisa da sua ajuda para **criar um novo chamado**.

Um agente pode criar três tipos de chamados:

**Chamada recebida** Para demandas **iniciadas por um cliente** a partir de uma chamada de telefone recebida.

**Chamada realizada** Para demandas *iniciadas por um agente\** a partir de uma chamada de telefone realizada.

**Enviar e-mail** Para demandas **iniciadas por um agente** a partir de um e-mail enviado.

##### 4.1.1 Preenchendo o formulário

Abaixo, uma explicação rápida de cada campo de entrada no formulário de Chamado novo:

**Título** O título do chamado que será usado como **assunto** de todos os e-mails trocados.

**Cliente** Ao digitar no campo cliente, a busca procura apenas **por endereços de e-mail**. Você **deve** selecionar uma das opções apresentadas ou então criar um novo cliente.

Você **não** pode atribuir um ticket a mais de um cliente.

---

**Dica:** Dica profissional da interface de usuário

---

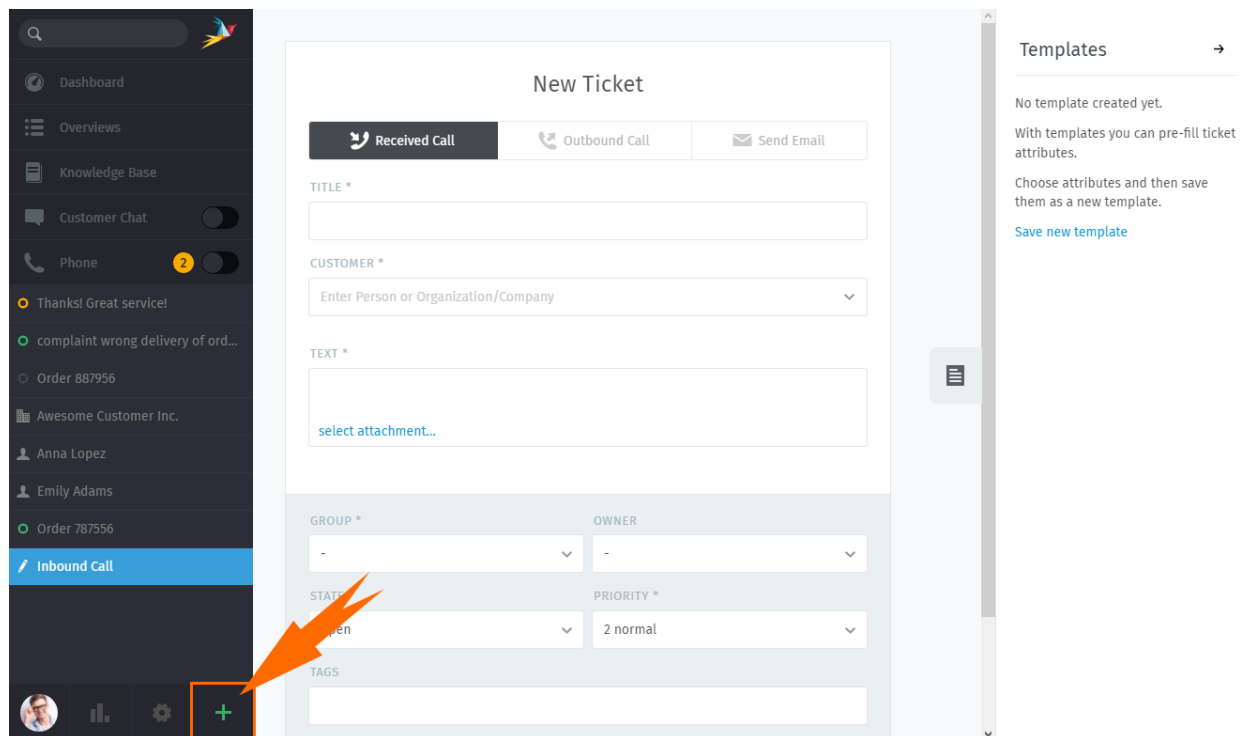


Fig. 1: Click the **button** to create a new ticket. The default ticket type is **Received Call**.

Fig. 2: A busca não pode encontrar um cliente pelo nome.



Uma vez que um cliente foi selecionado, o seu perfil se torna acessível a partir do **painel do chamado**.

**Texto** Para chamados a partir de uma chamada de telefone, registre os detalhes da conversa. Estas notas não serão enviadas ao cliente (embora ele poderá vê-las, se tiver uma conta Zammad).

Para e-mails, este é o copo de sua mensagem.

#### **Dica: Dica profissional da interface de usuário**

- O editor de mensagens suporta copiar e colar (ou arrastar e soltar) **texto formatado**, **imagens** e **arquivos anexados**.
- Utilize os `:doc;` atalhos de teclado `</advanced/keyboard-shortcuts>` para aplicar formatação ao texto.

## **Configurações dos chamados**

### **Nota: Veja também**

Para uma discussão mais aprofundada sobre cada configuração dos chamados, acesse os artigos abaixo:

- *Proprietário*
- *Situação*
- *Grupo*
- *Prioridade*
- *Rótulos*

## 4.2 Atualizando chamados

Normalmente, “trabalhar em um chamados” significa acompanhar as mensagens do cliente na “visão de discussão\*\*”. Você pode fazer isso ao:

- responder uma **mensagem individual**, ou
- adicionar uma mensagem/nota para **todo o chamado**.

Continue lendo para aprender mais ou avance para conhecer *as configurações de um chamado* (que é a outra metade da tarefa de “trabalhar em chamados existentes”).

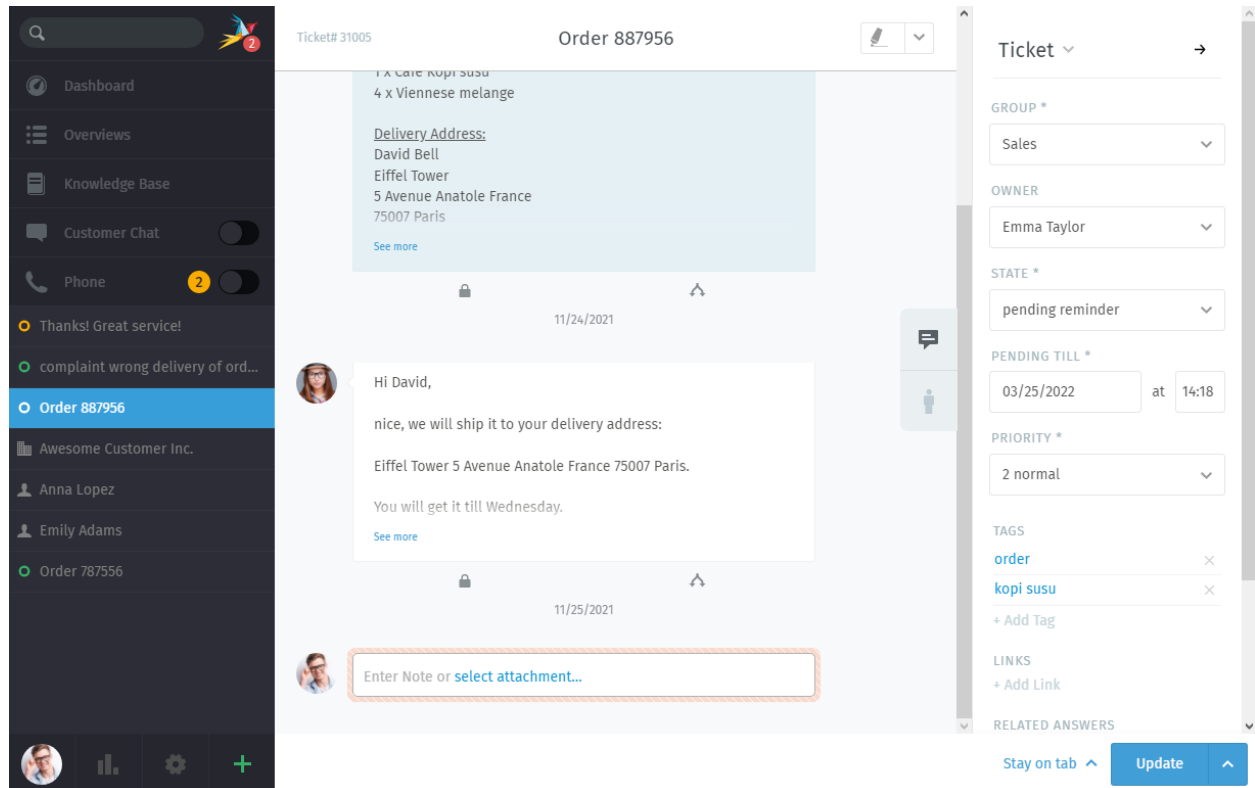


Fig. 3: Chamados são um fluxo de mensagens e notas sobre uma demanda de um cliente. *gerencie a configuração de um chamado no painel do chamado no lado direito da tela.*

**Dica:** A qualquer momento que acessar um chamado, uma nova entrada aparecerá na *lista de abas* no menu principal. O Zammad **salva automaticamente suas alterações** em todas as abas abertas.

### 4.2.1 Respondendo mensagens individuais

Use o botão **responder** debaixo de uma mensagem para respondê-la diretamente.

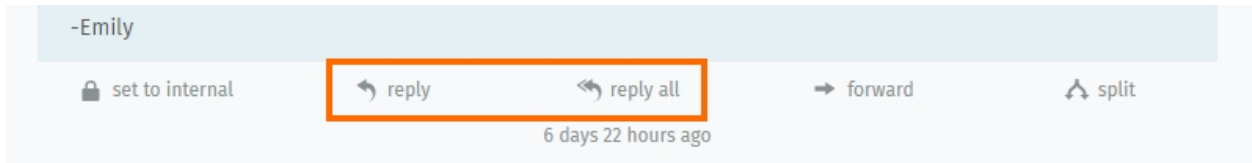


Fig. 4: Um opção adicionado para **responder a todos** aparecerá para as mensagens com mais de um destinatário.

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).

**Dica:** Você pode, também, **encaminhar mensagens**, da mesma forma como faria em qualquer cliente de e-mail (anexos serão incluídos automaticamente).

Desta forma, você pode compartilhar chamados com outras pessoas que não possuem acesso ao Zammad (como um fornecedor, por exemplo).

---

**Dica: Dica profissional da interface de usuário**

Clique na mensagem para ver informações detalhadas sobre ela.

---

### 4.2.2 Adicionando novas mensagens / notas

Clique no campo de texto no final do fluxo de mensagem para adicionar uma atualização.

Fig. 5: O tipo padrão de uma nova atualização é “nota”. Clique no botão para selecionar outro tipo.

Há três tipos diferentes de atualizações:

**Notas** Anote uma observação para você mesmo ou outros agentes quando uma nova informação for importante (notas não aparecem para clientes por padrão).

**Ligação telefônica** Registre o resumo de uma ligação telefônica que você teve com um cliente.

**E-mail** Envie um e-mail *para qualquer um* sobre o chamado. O nome do chamado será usada como assunto da mensagem (*clique no título para editá-lo*).

---

**Dica:** Clique no botão para alterar a visibilidade de uma nota ou mensagem.

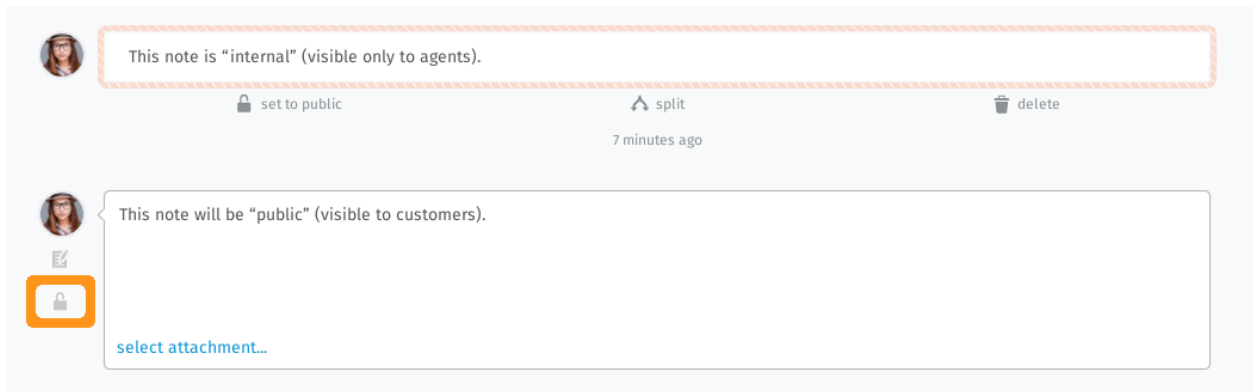


Fig. 6: “Interno:” mensagens são marcadas com uma borda de cor salmão e **\*\*\***podem ser visualizadas apenas por agentes\*.

---

### Dica: Dica profissional da interface de usuário

- O editor de mensagens suporta copiar e colar (ou arrastar e soltar) **texto formatado**, **imagens** e **arquivos anexados**.
  - Utilize os `:doc;` atalhos de teclado `</advanced/keyboard-shortcuts>` para aplicar formatação ao texto.
- 

### 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 lose 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.

---

**Nota:** 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

**Nota:** 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.

### Cuidado: Estou trabalhando aqui!

De vez em quando, dois agentes podem acessar o mesmo chamado ao mesmo tempo. Quando isto acontece, coisas estranhas podem a qualquer momento: clientes podem receber respostas conflitantes de agentes diferentes para a mesma demanda ou mudanças feitas por um agente podem acidentalmente serem desfeitas por outro.

Para manter as coisas sob controle, Zammad irá avisá-lo de conflitos potenciais exibindo avatares na parte inferior esquerda para cada agente que estiver acessando o mesmo chamado.

Tenha certeza de se comunicar com seus colegas para prevenir que os problemas descritos aconteçam.

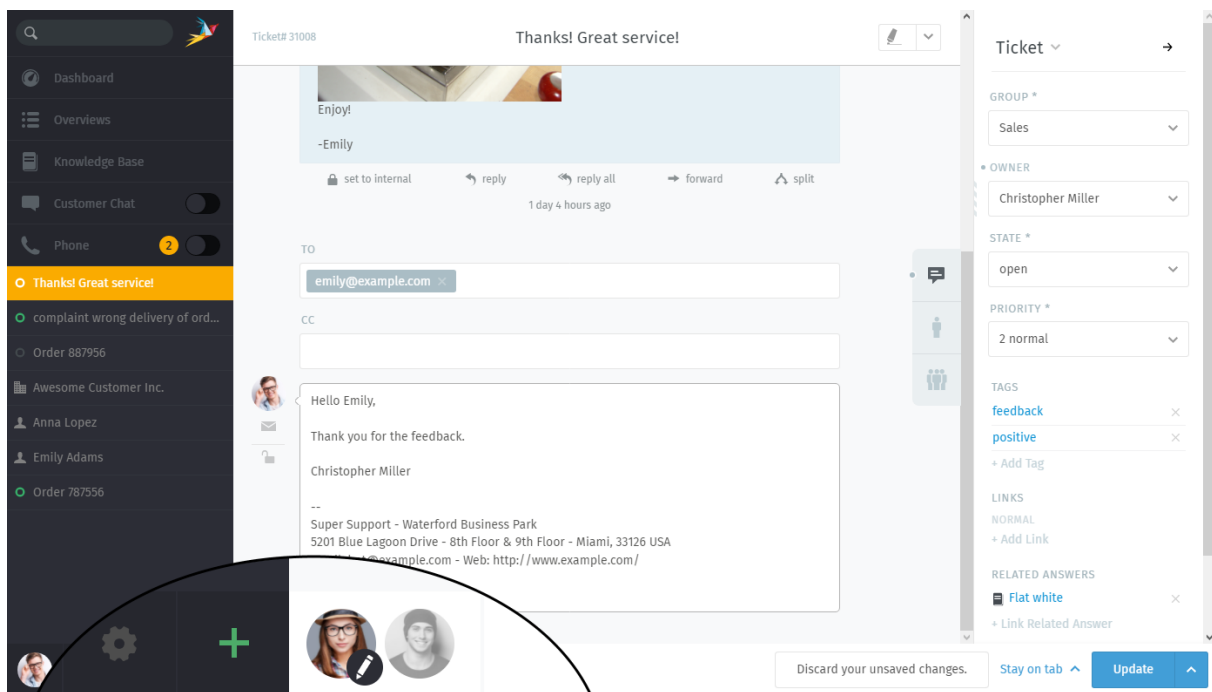


Fig. 8: Um ícone aparecerá se um agente tiver feito alterações que ainda não foram salvas no chamado.

## 4.3 Configurações dos chamados

Utilize o **painel do chamado** para gerenciar as configurações do chamado:

### 4.3.1 Grupo

**Grupos** são uma forma de controle de acesso que permite dizer *quais agentes podem fazer o que* com um determinado chamado.

#### O que?

Suponha que sua organização use o Zammad tanto para suporte a vendas quanto para suporte ao cliente. Suponha que você tenha 10 agentes espalhados nesses dois times, cada um trabalhando em vários chamados durante o dia.

Sem grupos, todos os agentes podem ver (e responder) qualquer chamado que chegar, independentemente, de qual departamento é o responsável. De fato, isso não é um problema em si, mas essa configuração leva a uma complicação desnecessária no menu de visões `</basics/find-ticket>`. Pode ser que fique muito ruim quando, por exemplo, um representante do suporte ao cliente tem acesso a um chamado direcionado aos recursos humanos e descobre, sem querer, quanto seus colegas recebem!

Se, ao invés disso, cada agente for atribuído a um grupo apropriado, então, eles terão acesso apenas aos chamados que pertencem ao seu próprio grupo.

---

#### Nota: Então, como gerencio o grupo a que pertencço?

Você não precisa, esta é uma [tarefa do administrador](#).

No entanto, você pode *verificar* a quais grupos pertence na seção Notificações nas suas [configurações de usuário](#):

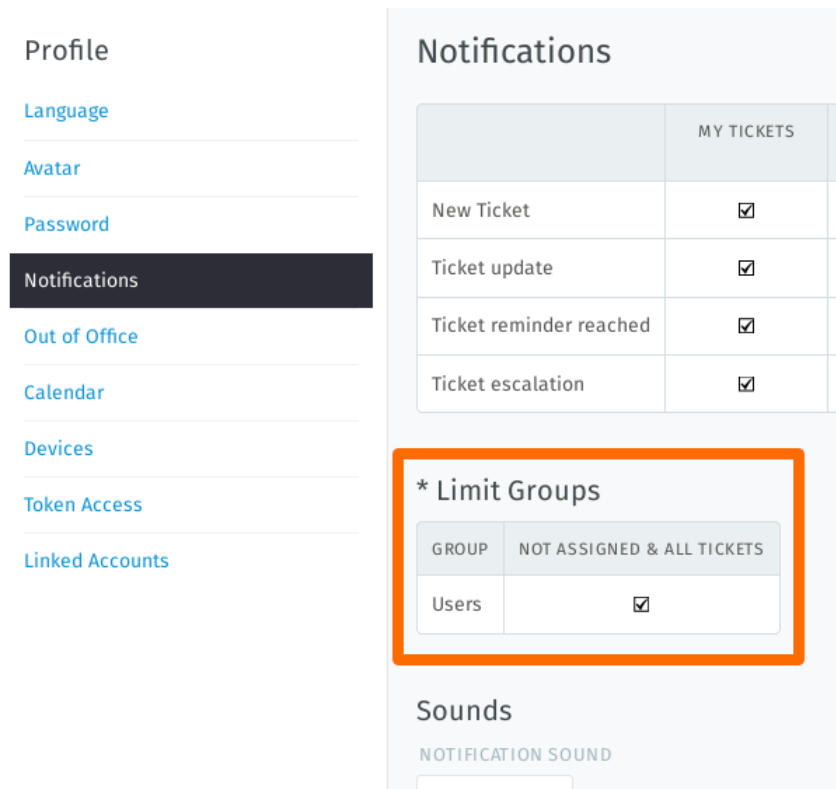


Fig. 9: Este usuário pertence a apenas um grupo (“Usuários”).

### Então, onde eu entro?

Se você pertence a mais de um grupo, você pode reatribuir um chamado de um grupo a outro que pertence. No entanto, em geral, você não precisa fazer isso, a menos que você seja um administrador, ou um administrador tenha discutido este procedimento com você com antecedência.

### 4.3.2 Proprietário

O **proprietário** de um chamado é simplesmente *o agente que é responsável por ele atualmente*.

#### De quem é a tarefa de atribuir chamados?

Depende do fluxo de trabalho da sua empresa, mas na maioria dos casos, **você irá atribuir um chamado para você mesmo** quando decidir trabalhar em um dos vários chamados novos disponíveis.

A princípio, qualquer agente pode atribuir qualquer chamado para quem desejar, desde que ambos tenham as autorizações necessárias para acessar o grupo 1 do chamado.

### Por que eu ira desejar reatribuir um chamado para outro agente?

Às vezes, assuntos complicados demandarão que um chamado seja *tratado por vários agentes diferentes* antes que possa ser fechado. Em situações como esta, um colega pode atribuir um chamado para você (ou vice-versa) depois que ele tiver resolvido o assunto parcialmente.

### 4.3.3 Estado

A **situação** de um chamado indica o *seu progresso em direção ao resultado* e pode ser:

- novo
- aberto
- fechado
- merged (this Ticket has been merged into another Ticket. Check either the [linked tickets](#) or the [ticket history](#) to learn more)
- pendente para fechar (ou seja, agendado para ser fechado automaticamente em uma data posterior)
- pendente (ou seja, oculto, mas agendado para reaparecer em uma data posterior)

#### 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.

	<b>Fechado</b>
	<b>Merged</b>
	<b>Adiado</b> (marcado como suspenso; nenhuma ação imediata é requerida)
	<b>Novo / Aberto</b> (pronto para ação)
	<b>Escalonado</b> (demanda ação imediata)

#### Qual a diferença entre *novo* e *aberto*?

A situação faz mais que apenas indicar o progresso: o Zammad possui um recurso de contagem de tempo refinado (conhecido como “[contrato de nível de serviço](#)” ou SLAs) que utiliza a situação para medir quanto tempo leva para um cliente receber uma resposta para um novo chamado ou conseguir que sua demanda seja resolvida por completo.

Em um chamado *novo*, o cliente ainda não recebeu sua primeira resposta para a sua demanda.

Em um chamado *aberto*, o cliente recebeu uma resposta inicial, mas a sua demanda ainda não foi resolvida.

---

**Nota:** Chamados na situação *pendente* não acumula tempo de trabalho e não aciona os limites de uma SLA.

Então, um chamado poderia ser marcado como *pendente* se estivesse aguardando o retorno de um fornecedor que está fora da cidade até a próxima semana, por exemplo.

---



### 4.3.4 Prioridade

A **prioridade** de um chamado é simplesmente um ranking (de 1 a 3) de *quão urgente ou importante ele é*.

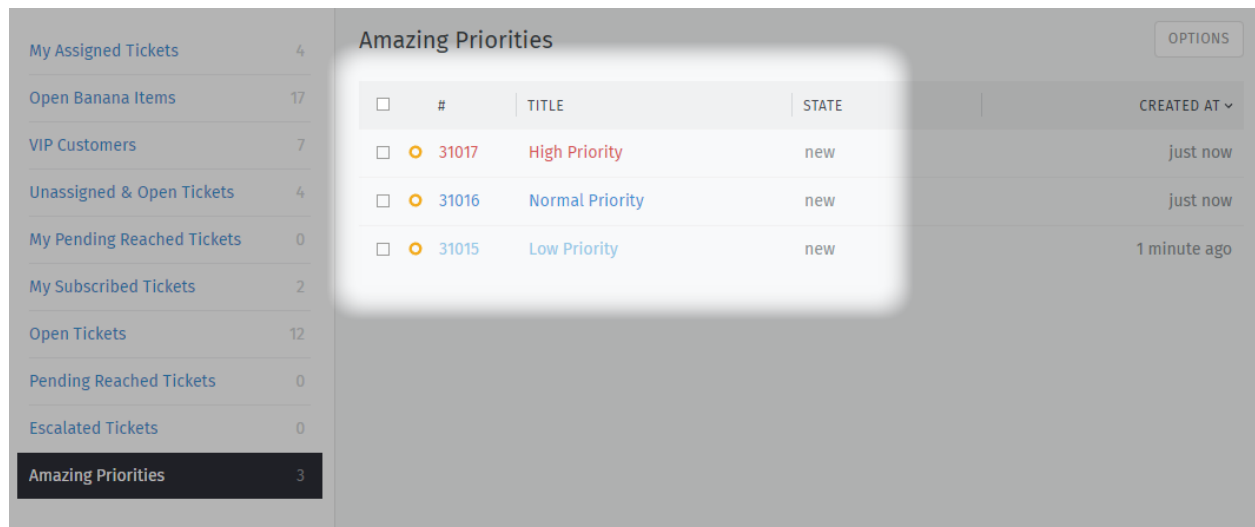


Fig. 10: Zammad's 3 default priorities allow you to see the importance of your tickets better.

### Mas o que a prioridade faz e como devo usá-la?

Por padrão, **a prioridade de um chamado não faz nada de fato**. Porém, os administradores do Zammad podem configurar toda a sorte de automação que é disparada com base nos valores da prioridade, por exemplo:

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

Priority can also be used as a ticket filter when creating [custom overviews](#).

Em outras palavras, **consulte seu administrador** para detalhes de como ele gostaria que a prioridade fosse utilizada.

### 4.3.5 Tags

**Rótulos** são textos personalizados que podem ser aplicados aos chamados para tornar mais fácil a tarefa de encontra-los no futuro.

**Dica:** *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**.

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

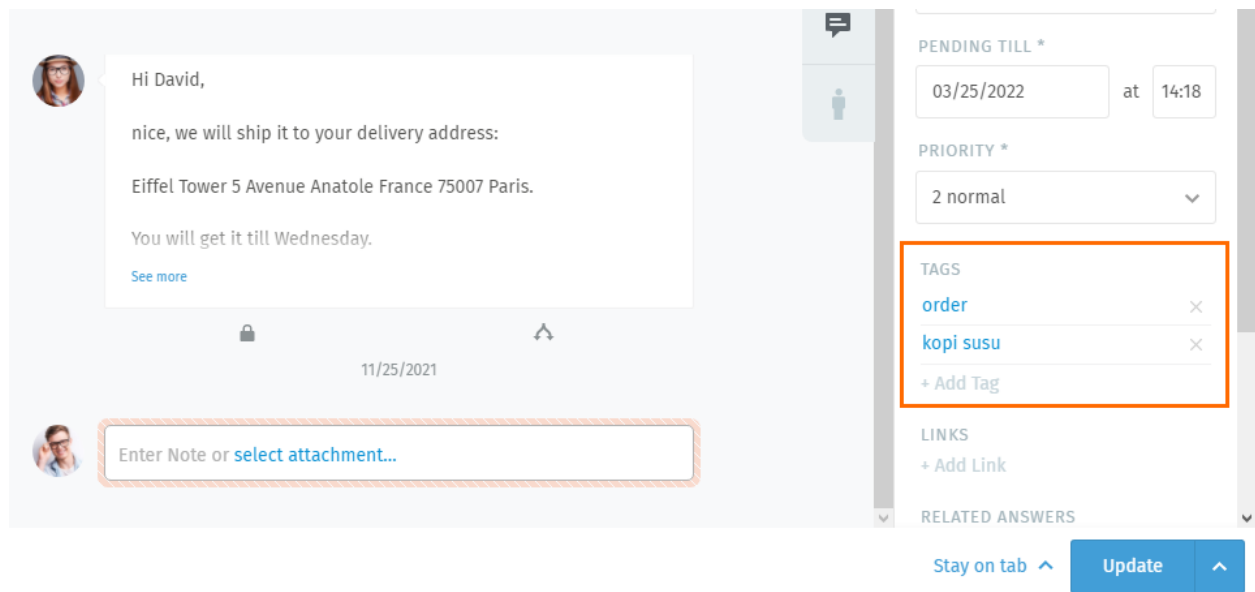


Fig. 11: Clique no nome de um rótulo para exibir outros chamados com o mesmo rótulo.

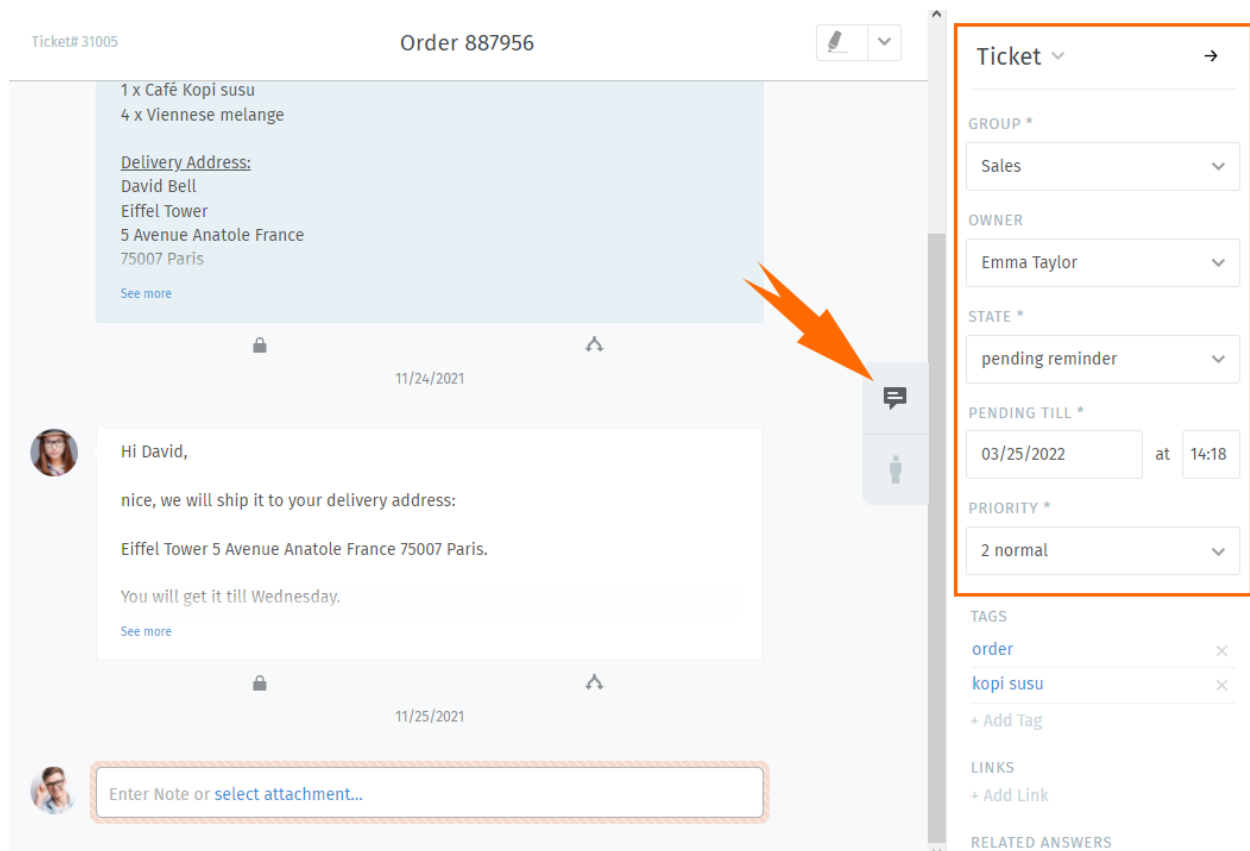


Fig. 12: Clique no botão → no canto para esconder o painel do chamado. Clique na aba para exibi-la de volta.

### 4.3.6 Renomear um chamado

Para renomear um chamado, simplesmente clique no título e comece a digitar.

### 4.3.7 Destacar o texto de um chamado

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

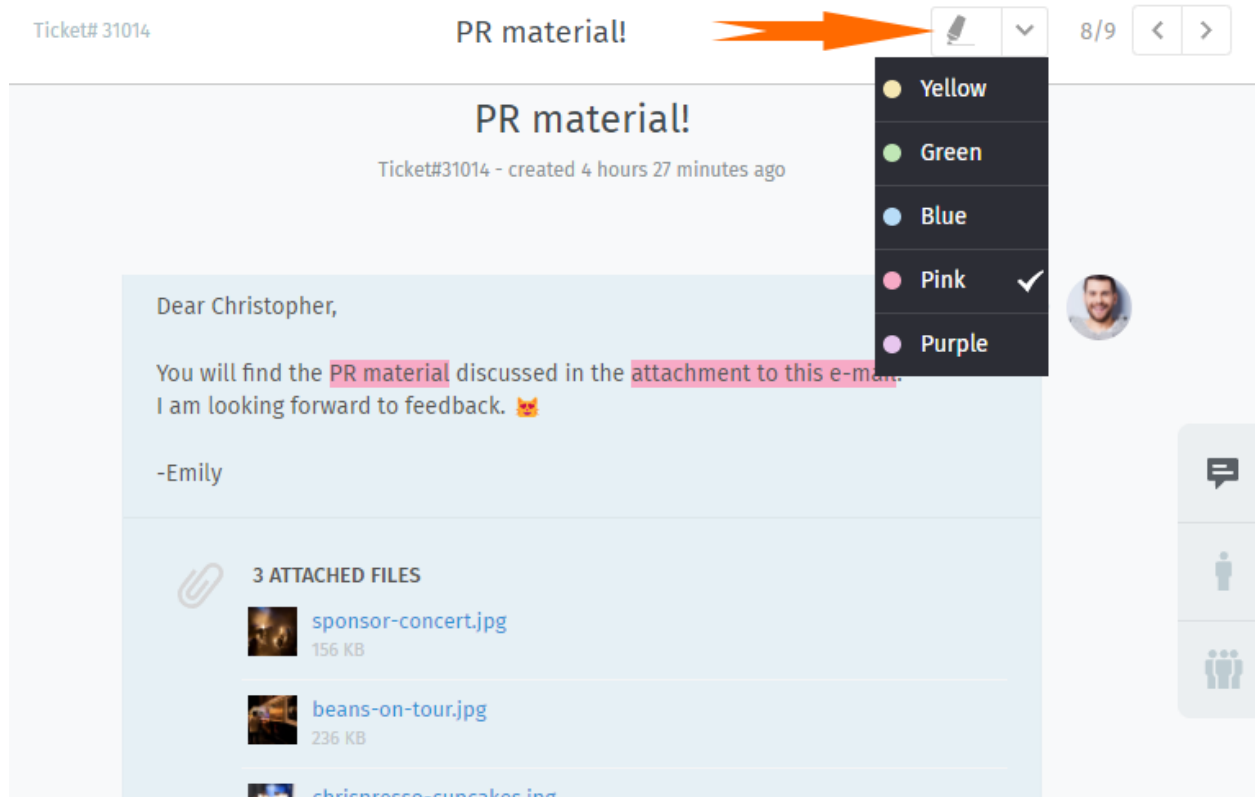


Fig. 13: Para destacar, selecione o texto e, então, clique na ferramenta. Clique novamente para desfazer.

#### Dica: Dica profissional da interface de usuário

Ações extras estão disponíveis no **sub menu**:

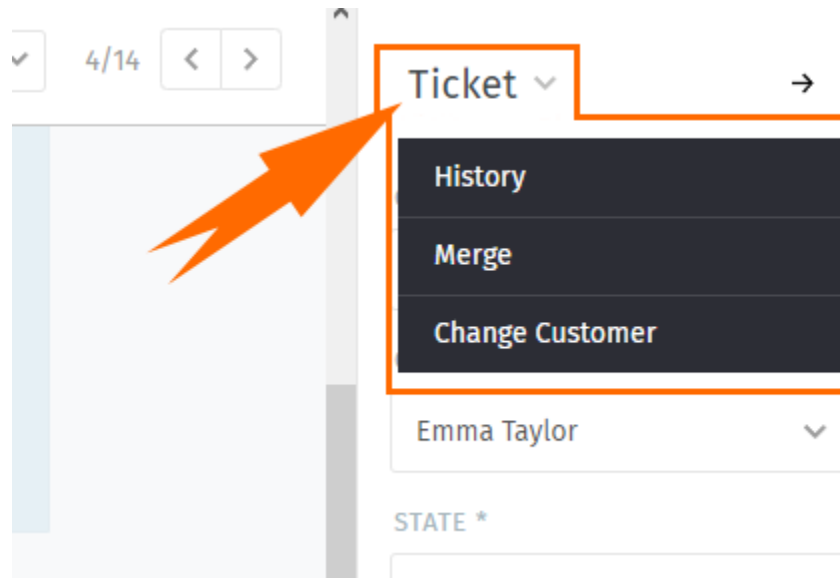


Fig. 14: Clique em **Chamado** para acessar ações adicionais.

**Histórico** Veja a lista completa de atualizações do chamado, realizadas por cada agente, desde a sua criação.

**Mesclar** Migra todas as mensagens/notas para outro chamado (see [Mesclando chamados](#) para detalhes).

**Alterar cliente** Reatribui o chamado a outro cliente.

---

## Ações dos Chamados

Diferentemente das configurações dos chamados (que são *atributos que podem ser modificados*), *\*\*ações\** são *operações que podem ser realizadas* em um chamado, geralmente para facilitar o processo de gerenciamento de chamados como um todo.

## 5.1 Mesclando chamados

Às vezes, você pode se encontrar com dois chamados para o mesmo problema (*por exemplo*, quando um cliente envia um novo e-mail ao invés de responder ao chamado existente).

Em casos como esse, você pode querer **mesclar estes dois chamados em um só**.

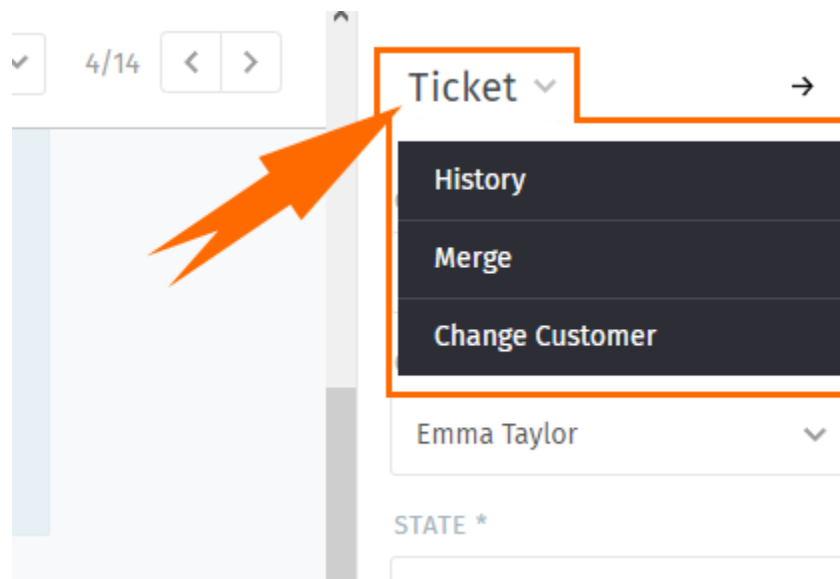


Fig. 1: Para mesclar dois chamados, acesse o submenu **Chamado** no painel do chamado.

**Nota:** Ao mesclar dois chamados, todas as mensagens e notas **do chamado original** serão migradas para o chamado selecionado.

Ou seja, se você 1) a partir do Chamado A, acessar a janela de diálogo para mesclar e, então, 2) selecionar o Chamado B nesta janela (veja abaixo), o Chamado A será esvaziado, fechado e *associado como um dependente* do Chamado B.

**Merge**

MERGE TO TICKET#

RECENT CUSTOMER TICKETS

	#	TITLE	CUSTOMER	GROUP	CREATED AT
<input type="radio"/>	89009	Need more informati...	David Bell	Sales	9 hours ago
<input type="radio"/>	89005	Order 887956	David Bell	Sales	06/05/2018

RECENT VIEWED TICKETS

	#	TITLE	CUSTOMER	GROUP	CREATED AT
<input type="radio"/>	89003	Order 787556	Samuel Lee (Awesom...	Sales	04/04/2018
<input type="radio"/>	89012	Error 4711	Samuel Lee (Awesom...	Sales	6 hours 1 minute ago

Cancel & Go Back Submit

Fig. 2: A janela de diálogo. Especifique um chamado para mesclar ao ID (1) ou selecione um chamado da lista (2).

## 5.2 Dividindo chamados

Alguns chamados podem, na verdade, abranger mais de um de problema ou demandar a atenção separadamente de dois departamentos diferentes (\*por exemplo, vendas e atendimento ao cliente).

Nestes casos, você pode **dividir uma única mensagem em um novo chamado**. (Alternativamente, pode fazer mais sentido *simplesmente revezar em um único chamado*.)

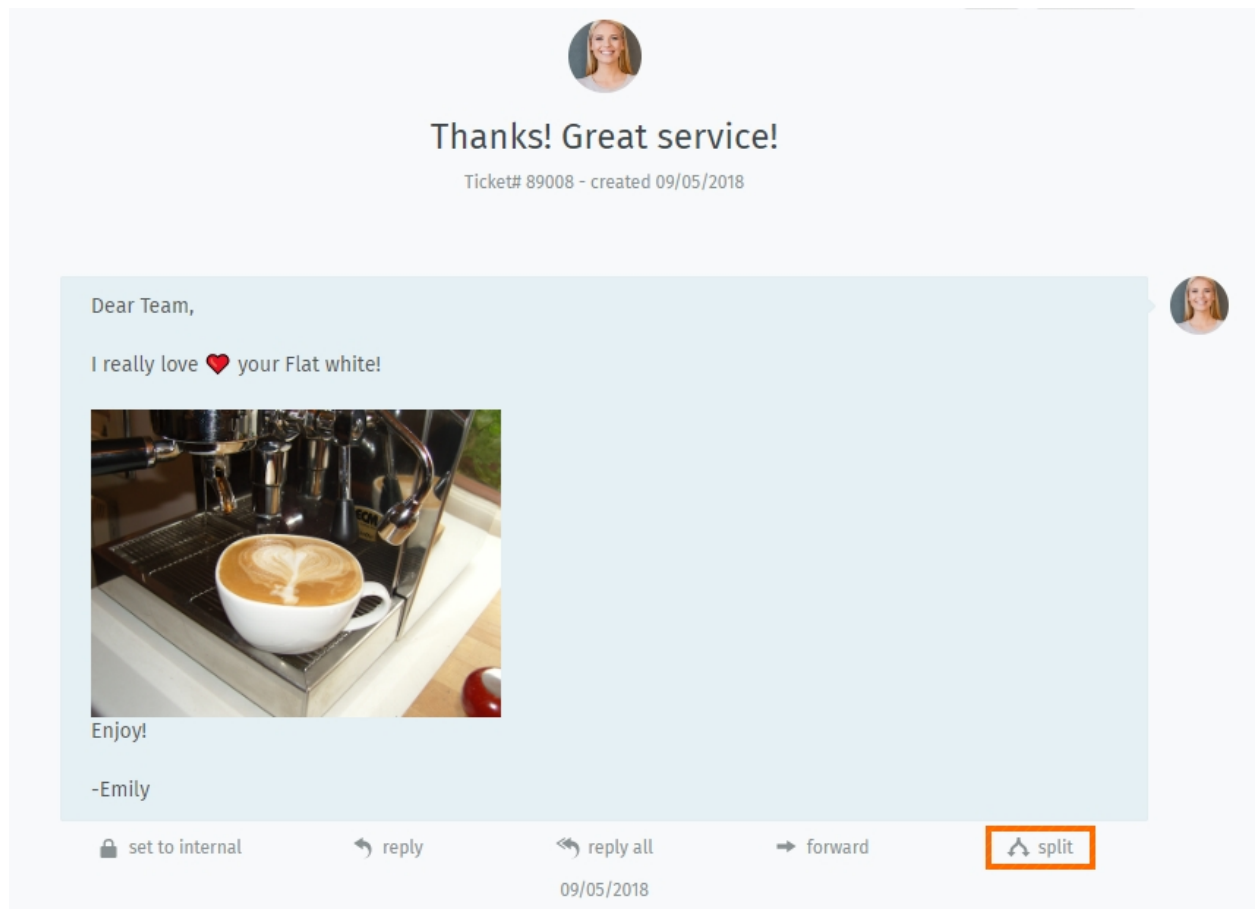


Fig. 3: Clique no botão “dividir” para usar uma mensagem como ponto de partida para um novo chamado.

### 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: Ao dividir um chamado, a mensagem escolhida é importada para a janela de diálogo de novo chamado. Como de costume, lembre-se de selecionar o **tipo** (chamada ou e-mail).



The screenshot displays the Zammad ticket management interface. The main area shows a ticket titled "Customer Feedback" with ID "Ticket# 31020". It features a large image of a latte being prepared in a coffee machine. Below the image are action buttons: "set to internal", "reply", "forward", and "split". A text input field at the bottom prompts the user to "Enter Note or select attachment...". On the right, a sidebar provides metadata for the ticket, including "GROUP" (Sales), "OWNER" (-), "STATE" (open), and "PRIORITY" (2 normal). A "LINKS" section is highlighted with an orange border, showing a "PARENT" link titled "Thanks! Great service!" from "1 day 5 hours ago". Other sections like "RELATED ANSWERS" and "NOTIFICATIONS" are also visible. At the bottom right, there are buttons for "Stay on tab" and "Update".

Fig. 5: O chamado original é *associado* ao novo, como visto no painel do chamado.

## 5.3 Associando chamados

Quando chamados sobre assuntos relacionados são criados (*por exemplo*, múltiplas reclamados de clientes sobre um envio fracassado), eles podem ser **associados uns aos outros** para facilitar a referência.

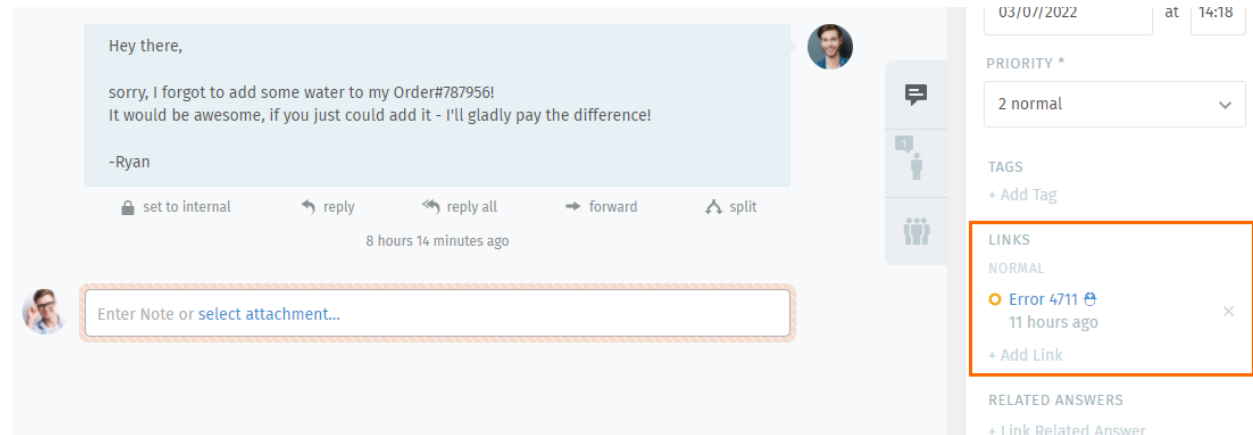


Fig. 6: Clique no botão *Adicionar associação* para acessar a janela de associação.

**Dica:** Chamados associados podem, opcionalmente, serem organizados em uma hierarquia de pai e filho.

Link

Link Ticket

as Normal of Ticket# 83003.

RECENT CUSTOMER TICKETS

#	TITLE	CUSTOMER	GROUP	CREATED AT
<input type="radio"/> <span>83012</span>	<span>Error 4711</span>	Samuel Lee ...	Sales	2017-09-08

RECENT VIEWED TICKETS

#	TITLE	CUSTOMER	GROUP	CREATED AT
<input type="radio"/> <span>83022</span>	<span>Request</span>	Jacob Smith ...	Sales	just now

[Cancel & Go Back](#)

Submit

Fig. 7: A janela de associação. Especifique o ID (1) de um chamado para associar ou selecione um da lista (2).



---

### Abas

---

A medida que você navega pelo Zammad, você verá uma lista aparecer na área do menu principal. Estas são as suas **abas abertas**.

---

**Nota:** Você pode trocar entre abas livremente sem perder o seu trabalho - todas as alterações não salvas são automaticamente armazenadas no servidor.

---

---

**Dica:** **Dica profissional da interface de usuário**

- *As situações dos chamados* são **representadas por cores**:

	<b>Fechado</b>
	<b>Merged</b>
	<b>Adiado</b> (marcado como suspenso; nenhuma ação imediata é requerida)
	<b>Novo / Aberto</b> (pronto para ação)
	<b>Escalonado</b> (demanda ação imediata)

- Um **ponto pulsante** significa que o chamado tem nova atividade desde a última vez que foi visualizado.
  - Arraste as abas para rearranjar a ordem.
-

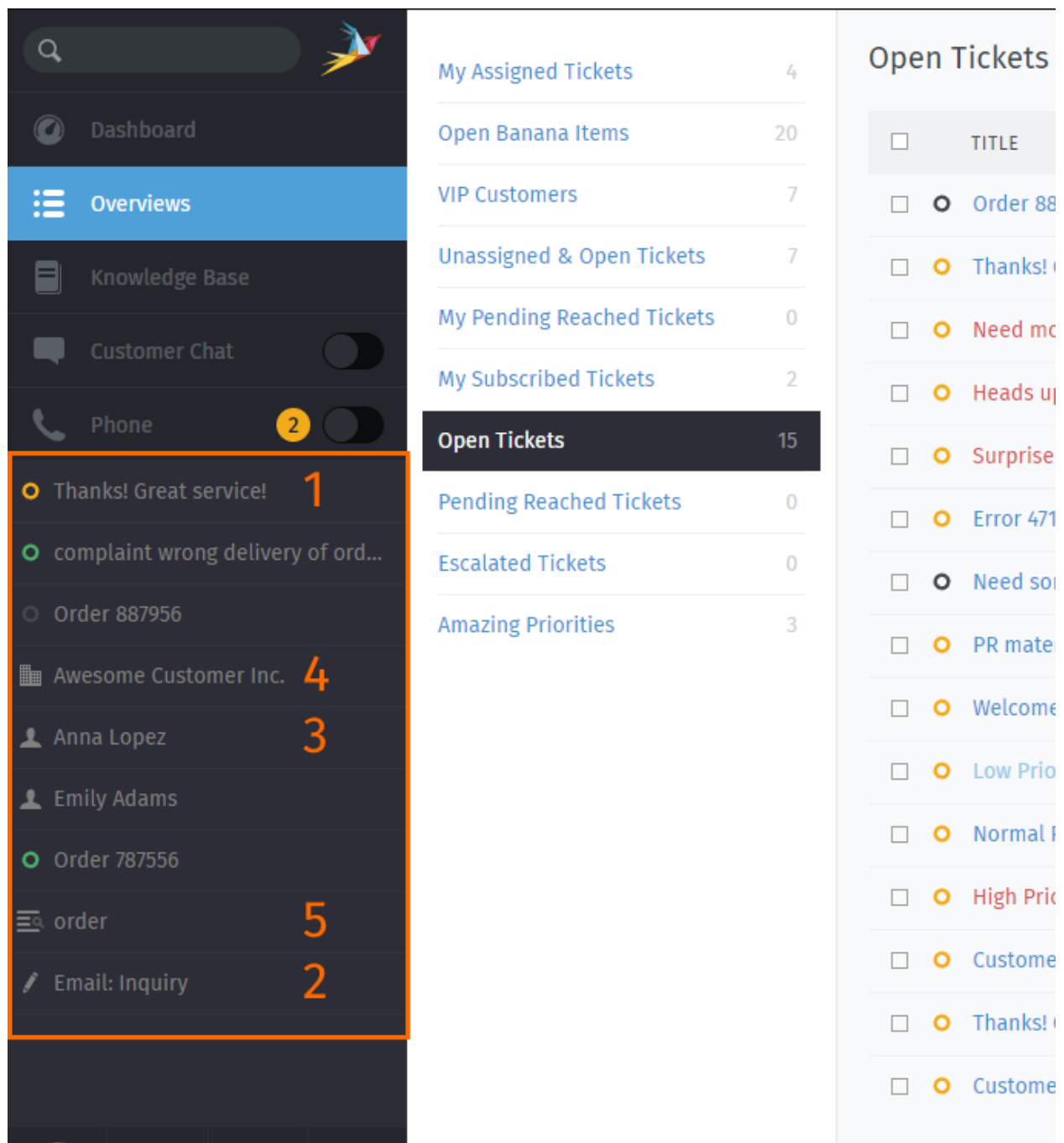


Fig. 1: Abas aparecem no menu principal a medida que você visita partes diferentes da aplicação.

Quais itens aparecem em uma nova “aba”?

1. Chamados atuais
2. Novos chamados
3. Usuários
4. Organizações
5. Resultados da busca

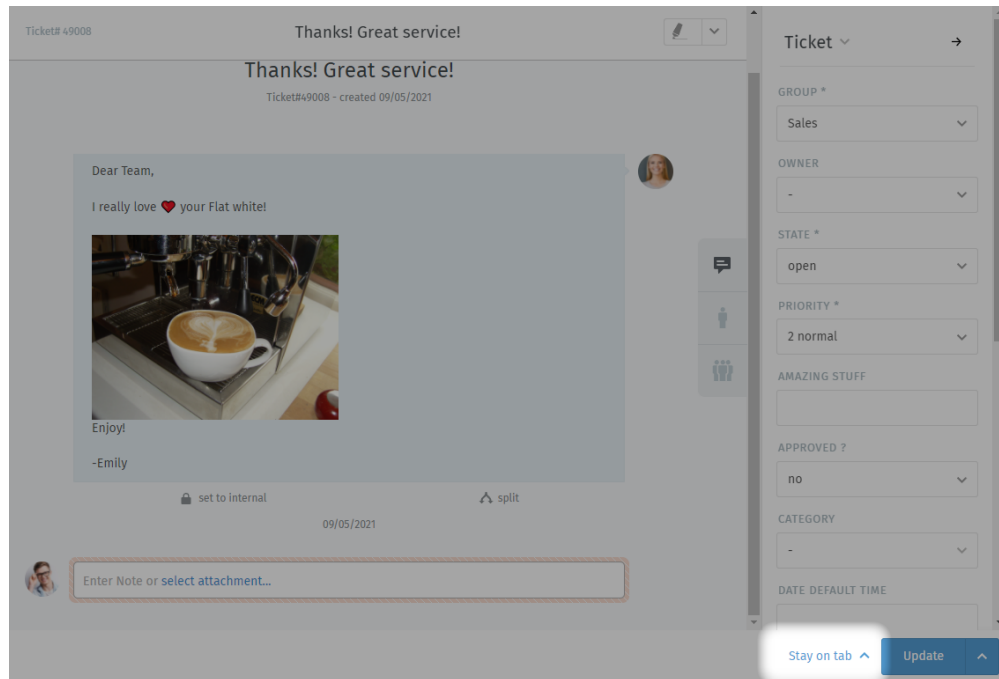
## 6.1 Tab behavior in ticket zooms

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

---

**Nota:** 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.

---

**Nota:** 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.

---

**Nota:** 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.*





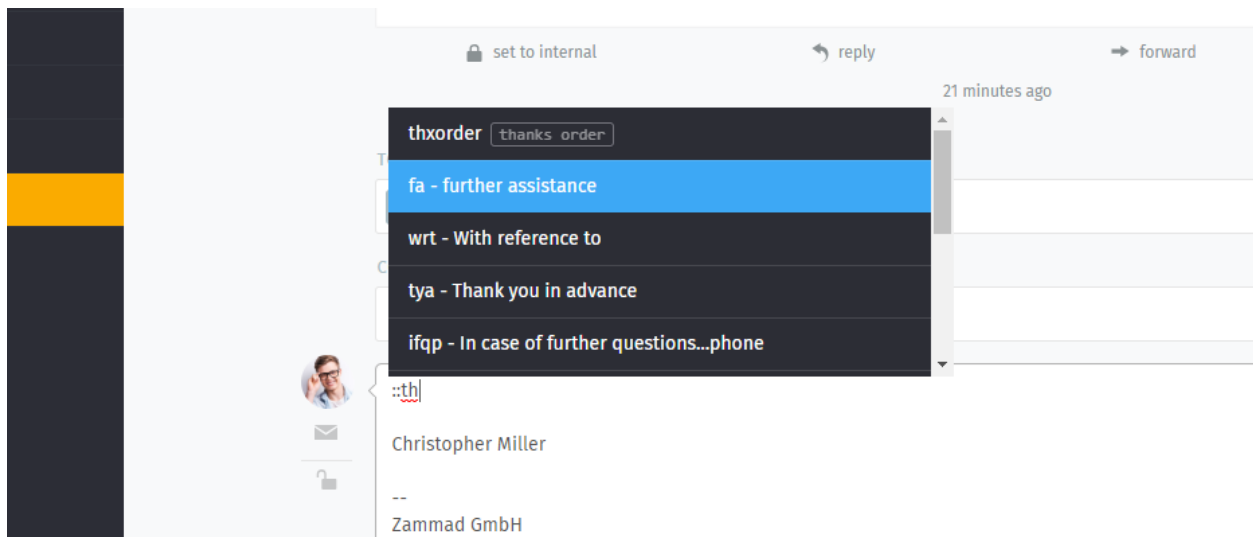
---

Trabalhando com Módulos de Texto

---

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.

Para acessar os módulos de texto disponíveis, digite `::` no corpo de um artigo. Se encontrar o módulo de texto desejado, pressione `enter` ou clique com o botão direito do mouse e o Zammad irá inserir o texto na posição do seu cursor.



---

**Dica:** Você pode tanto rolar por todos os módulos de texto (com as teclas de direção ou com o mouse), digitar o módulo de texto ou fornecer uma palavra chave (se estas estiverem definidas).

---

---

**Nota:** 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 Módulos de texto na criação de chamado

Você, também, pode usar módulos de texto na criação de chamados. Na tela de criação, nossos *Modelos de chamados* podem ser úteis, também.

## 7.2 Personalização de módulos de texto

Administrators can learn more about customizing text modules [here](#).

## Modelos de chamados

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

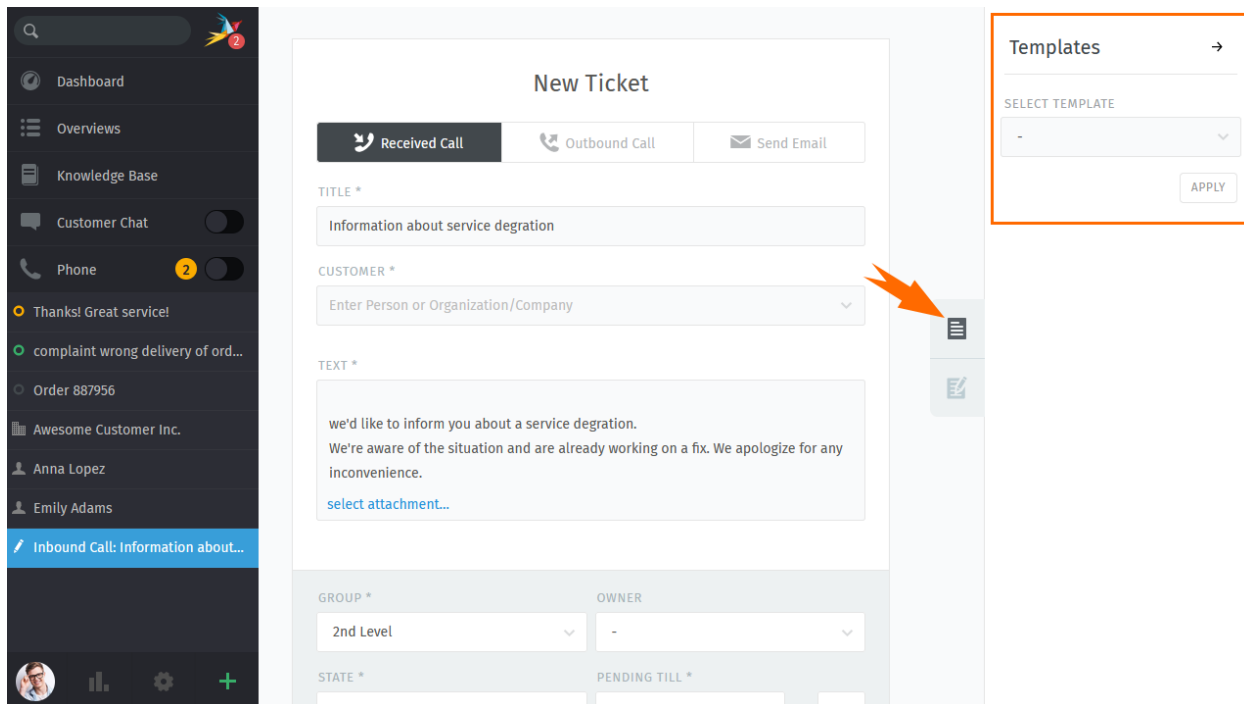



Fig. 1: Use the ticket pane to load ticket templates.

On any *new ticket* dialogue use the  tab on the right to display the *Templates* column. If Zammad has any templates for you to apply, you'll be provided with a drop down list to choose from.

Select a fitting template and press *Apply*. The configured ticket fields will be populated with the data from the template.

**Aviso:** With version 5.3 Zammad is able to detect “field collisions”. This means: If you previously filled in data in a field that’s supposed to be filled by the template, Zammad *will not* overwrite the field with the template data. Instead it will keep your version of the field. This allows you to e.g. fill in the customer before applying the template.

---

**Nota: I can’t add or adjust templates?!**

Managing templates requires additional permissions. Please ask your administrator to provide you with the needed permission.

[Learn more about ticket templates in the admin documentation.](#)

This permission was introduced with Zammad 5.3.

---

---

### Pesquisa Avançada

---

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)
```

---

#### **Nota: Search phrases changed for Zammad 4.0**

With Zammad  $\leq 3.6$  the following keys contained a string only:

- group
- priority
- estado
- organization

With Zammad  $\geq 4.0$  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 Atributos disponíveis

**Dica:** For a more detailed list of available attributes please take a look into our [Zammad Admin-Documentation](#)

Tabela 1: Atributos e sua utilização

Atributo	Valores possíveis	Exemplo	Descrição
number	1118566	number:1118566 lbrlnumber:11185*	Procura pelo número do chamado
título	qualquer título	title:"algum título" lbrlttitle:Solicitação lbrlttitle:"qualquer tí*"	Se você precisa usar espaços na frase de busca, utilize aspas em volta. O Zammad fará uma busca do tipo "E" (AND) com as palavras fornecidas. Você, também, pode utilizar uma única palavra, sem aspas.
created_at	2018-11-18	created_at:2018-11-18 lbrlcreated_at:[2018-11-15 TO 2018-11-18] lbrlcreated_at:>now-1h	Você pode tanto utilizar uma data simples, como uma faixa ou >now-xh (agora menos x horas). Note que o formato de data precisa ser AAAA-MM-DDD
state.name	novo lbrlaberto lbrl-fechado etc	state.name: new state.name:new OR open	Você pode tanto filtrar por uma situação específica (e até mesmo combiná-las com um OU (OR)). Note que você precisa usar os nomes em inglês da situação, a menos que você tenha uma situação personalizada na sua instância.
article_count	5 lbrl[5 TO 10] lbrl[5 TO *] lbrl[* TO 5]	article_coun:5 lbrlarticle_count:[5 TO 10] blrlarticle_coun:[5 TO *] lbrlarticle_count:[* TO 5]	Você pode procurar por chamados com uma quantidade específica de artigos (você pode até mesmo procurar por tudo com 5 ou mais artigos ou com no máximo 5 artigos, se necessário).
article.from	*silva*	article.from:*silva*	Procura por todos os chamados que contai um artigo criado por "Silva"
article.body	serviço lbrlservi~ lbrl/he?r(r[iy]que)/	article.body:serviço lbrlarti- cle.body:servi~ lbrlarti- cle.body:/he?r(r[iy]que)	O primeiro exemplo procura por todos os chamados que contenham um artigo com a palavra "serviço" - você também pode utilizar o operador "~" para fazer pesquisa por palavras similares como "serviçal". Zammad também permite a busca utilizando expressões regulares, sempre que o atributo permitir, como no terceiro exemplo.

### Dica: 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:

Tabela 2: Exemplos de combinações de termos de buscas

Frase pesquisada	Descrição
state.name:(closed OR open) AND (priority.name:"2 normal" OR tags:feedback)	apresenta todos os chamados cuja a situação seja fechada ou aberta e que tenha prioridade normal ou que tenha um rótulo “sugestão”.
state.name:(closed OR open) AND (priority.name:"2 normal" OR tags:feedback) AND !(Zammad)	Apresenta o mesmo resultado acima, mas exclui os chamados que contêm a palavra “Zammad”
owner.email:bob@example.net AND state.name:(open OR new)	Apresenta todos os chamados de <a href="#">silva@example.net</a> que estão abertos ou novos
state.name:pending* AND article_count:[1 TO 5]	Retorna tudo que estiver pendente e que tenham entre 1 e 5 artigos.

## 9.2 Alguns atributos dos chamados e os seus respectivos tipos

Abaixo você encontra os atributos mais importantes ordenados por chamado e artigo.

### 9.2.1 Atributos do ticket

- number: texto
- title: texto
- group: object (group.name, ...)
- priority: object (priority.name, ...)
- state: object (state.name, ...)
- organization: object (organization.name, ...)
- owner: objeto (owner.firstname, owner.lastname, owner.email, ...)
- customer: objeto (customer.firstname, customer.lastname, customer.email, ...)
- first\_response\_at: rótulo de tempo (timestamp)
- first\_response\_in\_min: inteiro (tempo em minutos úteis para a primeira resposta)
- close\_at: rótulo de tempo
- close\_in\_min: inteiro (minutos úteis para fechar)
- last\_contact\_at: rótulo de tempo (registro de tempo do último contato do cliente ou do agente)
- last\_contact\_agent\_at: rótulo de tempo (registro de tempo do último contato do agente)
- last\_contact\_customer\_at: rótulo de tempo (registro de tempo do último contato do cliente)
- create\_article\_type: texto (email | phone | web | ...)
- create\_article\_sender: texto (cliente | agente | sistema)
- article\_count: inteiro (quantidade de artigos)
- escalation\_at: rótulo de tempo (registro de tempo do momento em que o chamado escalou a SLA)
- pending\_time: timestamp (registro de tempo até quando o chamado ficará pendente)

### 9.2.2 Atributos do artigo

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



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.

---

**Nota:** **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:

---

**Dica:** **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.

---

**Nota:** **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.

---

---

## Fluxos de trabalho sugeridos

---

### 11.1 Compartilhando o trabalho em um chamado

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

Suponha que uma chamada entre no departamento de vendas. Um representante de vendas atende, cria um chamado e pesquisa alguns preços para o cliente. Depois de fazer algumas anotações, o representante decide que o chamado precisa ser transferido para o serviço de atendimento ao consumidor.

Nosso representante de venda pode simplesmente remover o seu nome do campo **proprietário** do chamado e atribuí-lo para o **grupo** Serviço de Atendimento ao Consumidor. *Todos os agentes deste grupo serão notificados do novo chamado* e o primeiro agente disponível pode assumir o chamado de onde o representante de vendas parou.

---

**Dica:** Tenha certeza de que deixo notas no chamado com tanta informação quanto possível para o próximo agente!

---

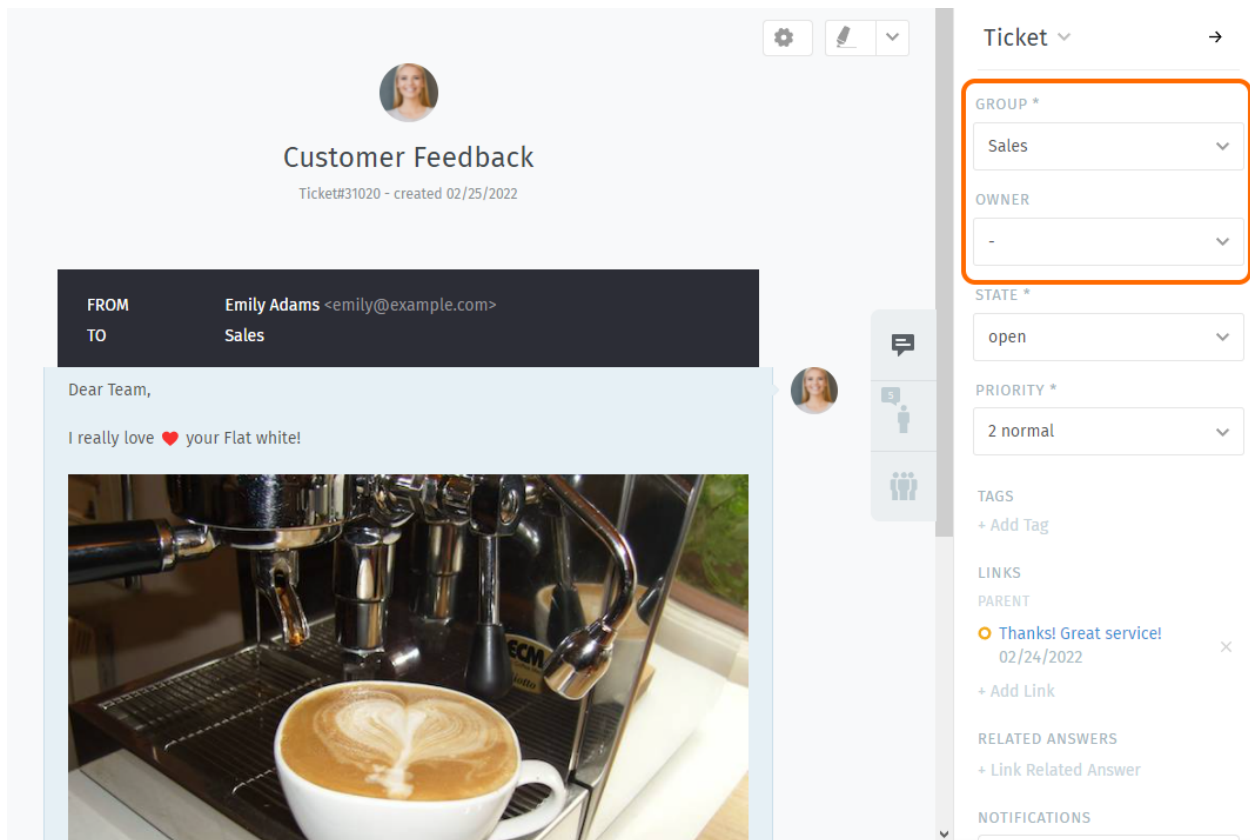


Fig. 1: Reatribua um chamado (com o campo *Grupo* ou *Proprietário*) para notificar os colegas de que a sua parte do trabalho está pronta.

### 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:

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

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:

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

---

**Dica:** Check your *Perfil e configurações* to customize how you receive notifications.

---

---

**Nota:** 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.

---

**Nota:** 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.

---

**Dica:** 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!

---

**Nota:** This functionality is only available in ticket overviews.

---

## CAPÍTULO 12

---

### Gestão de Tempo

---

O Zammad suporta a contagem de tempo detalhada para ajudar os administradores a rastrear quanto tempo é gasto em um chamado, cliente ou organização.

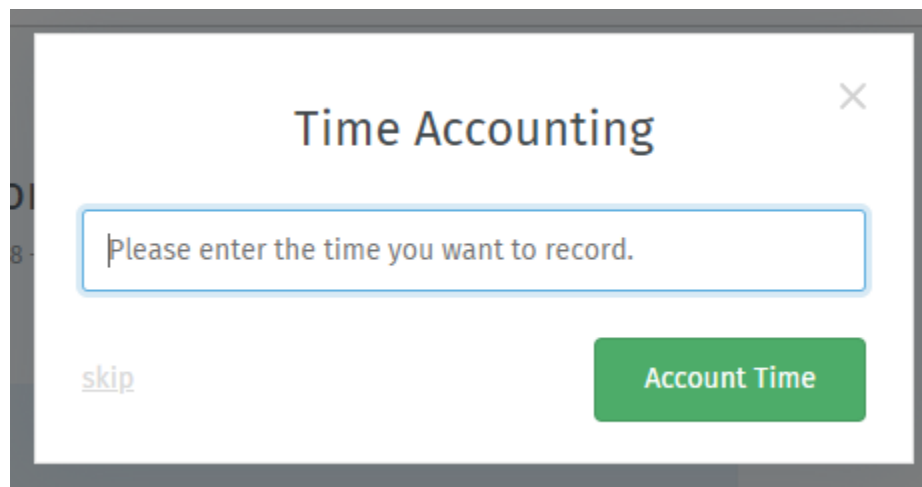


Fig. 1: Se a contagem de tempo está habilitada, esta janela de diálogo aparecerá toda vez que um chamado for utilizado. Digite a quantidade de tempo gasta no chamado (em minutos ou qualquer outra unidade de tempo que você e seus colegas estejam usando).

---

**Nota:** Hum? Eu não vejo nenhuma janela de diálogo “Contagem de tempo”...

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](#).

---





## CAPÍTULO 13

---

### Atalhos de teclado

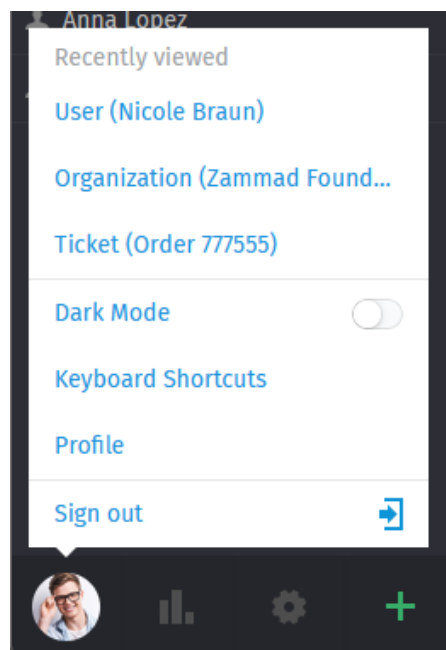
---

Zammad suporta uma ampla quantidade de atalhos de teclado para acelerar o seu fluxo de trabalho e torná-lo um usuário experiente.

---

**Dica: Dica profissional da interface de usuário**

Clique na imagem do seu perfil na parte inferior do menu para acessar a **tabela de referência de atalhos de teclado**.



Alternativamente, você pode usar um dos atalhos abaixo (muito fácil!)

- “Ctrl” + “Shift” + “H” (no Windows)

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

 Show next tab

shift ctrl shift+tab

 Show 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

Appearance

Used anywhere

d

 Toggle dark mode

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 1

 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: A folha de dicas de atalhos de teclado no Windows.

- “Ctrl” + “Shift” + “H” (no Linux)
  - “Cmd” + “Ctrl” + “Shift” + “H” (no macOS)
- 

## 13.1 Formatando texto

Atalhos de teclado podem ser usados para aplicar formação de texto rica de duas formas diferentes:

### **Enquanto digita**

- Pressione “Cmd” + “I” para habilitar o modo itálico,
- digite o seu texto desejado, e
- pressione “Cmd” + “I” novamente para desabilitar o modo itálico.

### **Tudo de uma vez**

- Digite o seu texto desejado
- clique e arraste com o mouse para selecionar o texto, e
- pressione “Cmd” + “I” para formatar como itálico.



Utilize o **painel do chamado** para gerenciar os perfis dos clientes.

The screenshot displays a customer support interface. At the top, it shows 'Ticket# 49005' and 'Order 887956'. Below this, there's a section for 'Delivery Address' with details: David Bell, Eiffel Tower, 5 Avenue Anatole France, 75007 Paris. A 'See more' link is present. Below the address, there are icons for 'set to internal' and 'split', and a date '02/27/2022'. A chat bubble shows a message from a customer: '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.' Below the chat, there's a 'set to internal' icon, a 'split' icon, and a date '02/28/2022'. At the bottom, there's a text input field with the placeholder 'Enter Note or select attachment...'. On the right side, there's a 'Customer' panel. It shows the customer's name 'David Bell' and company 'Awesome Customer Inc.' with a profile picture. Below this, it lists '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), and 'TICKETS' (open (2), closed (1)). An orange arrow points from the chat bubble to the 'Customer' panel. At the bottom right, there are buttons for 'Discard your unsaved changes.', 'Stay on tab', and 'Update'.

Fig. 1: Clique na aba no painel do chamado para ver o perfil do cliente.

**Dica:** Dica profissional da interface de usuário

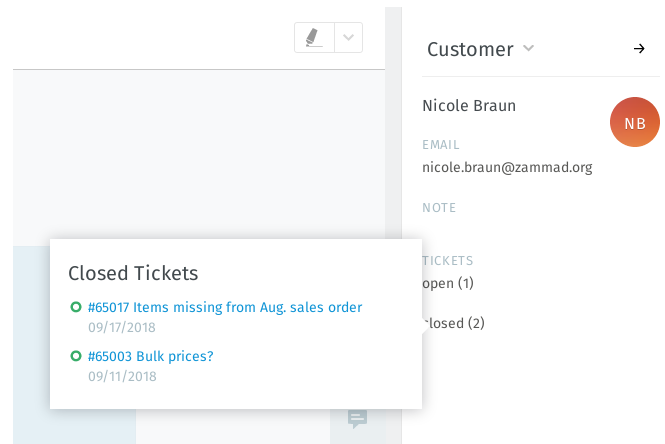


Fig. 2: Mova o mouse sobre os rótulos **aberto/fechado** para ver um resumo de outros chamados do cliente.

## 14.1 Editando um cliente

Para editar o perfil de um cliente, utilize o **submenu cliente**:

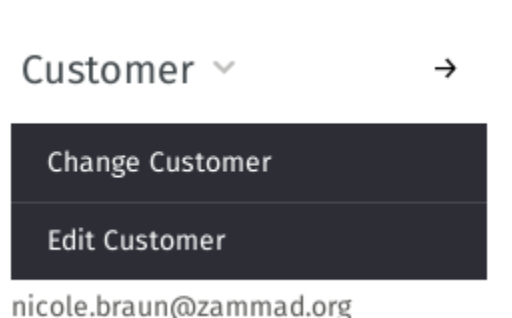


Fig. 3: Clique em **\*\*Cliente \*** para acessar ações adicionais.

A maioria dos atributos de um cliente são auto explicativos, mas aqui estão um conjunto que pode confundir:

**Organização** Clientes podem (opcionalmente) pertencerem a **organizações** - *avance* para aprender mais.

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

**VIP** Da mesma forma que a *prioridade de um chamado*, o **status VIP** de um cliente não significa nada por si só, mas um administrador *pode* configurar serviços automatizados com base nos valores deste atributo ou usá-lo como um filtro para uma *visão personalizada*.

**Pergunte ao seu administrador** como ele gostaria de utilizar este atributo (ou apenas ignore-o).

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. 

×

 Search...

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

Cancel & Go Back

Submit

Fig. 4: A janela de edição de cliente.





Um chamado rastreia a comunicação entre indivíduos, mas muitas vezes, o cliente real de sua empresa é uma **outra empresa** (ou **organização**). Clientes podem ser agrupados em organizações para monitorar a atividade do grupo como um todo.

### 15.1 Perfis de organização

Utilize o **painel do chamado** para gerenciar o perfil de uma organização.

Para editar o perfil de uma organização, utilize o **submenu organização**:

### 15.2 Estatísticas da organização

Com as organizações, você pode responder questões como:

- “Quantos chamados desta empresa tivemos que tratar nos últimos 12 meses?”
- “Quantos chamados abertos esta empresa tem neste exato momento?”
- “Quão antigo é o chamado aberto há mais tempo desta empresa?”

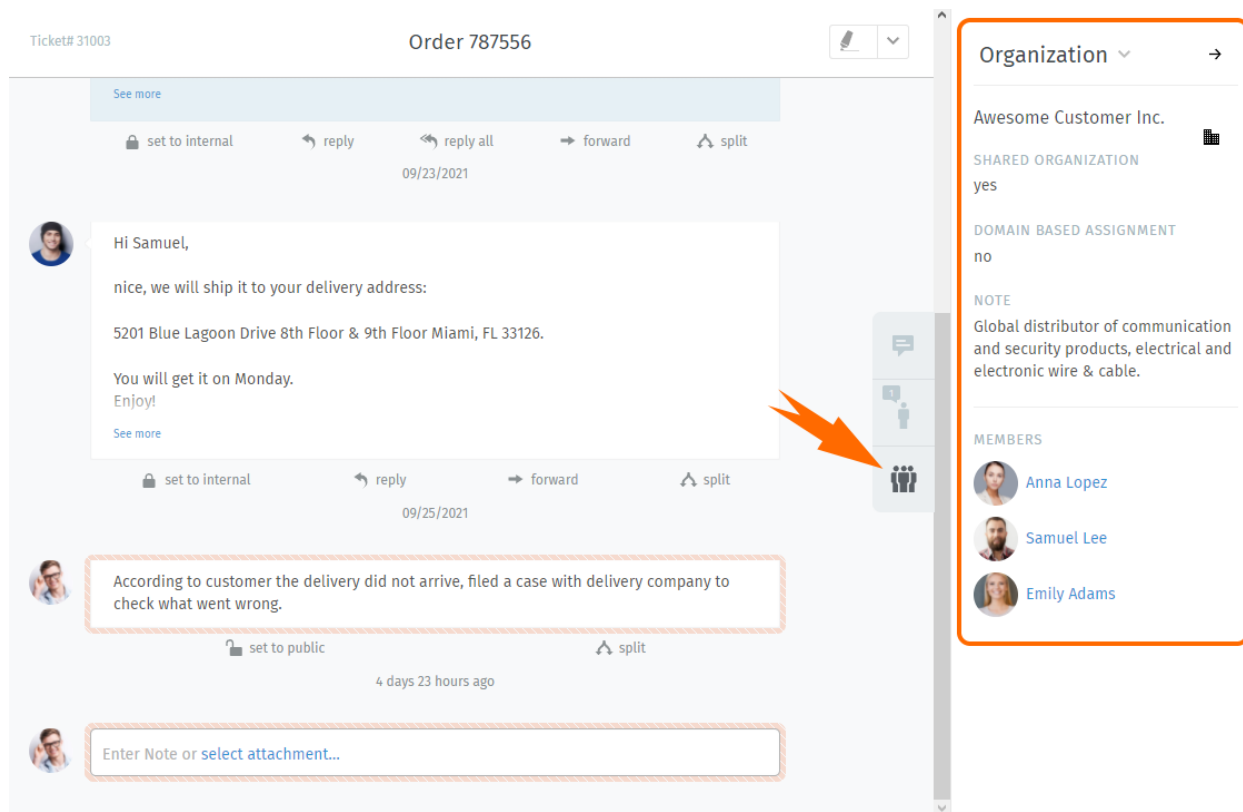


Fig. 1: Clique na aba com o símbolo no painel do chamado para ver o perfil da organização.

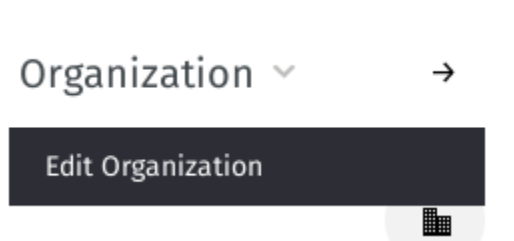


Fig. 2: Clique em **Organização** para acessar ações adicionais.

Fig. 3: A janela de edição de organização.

## 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

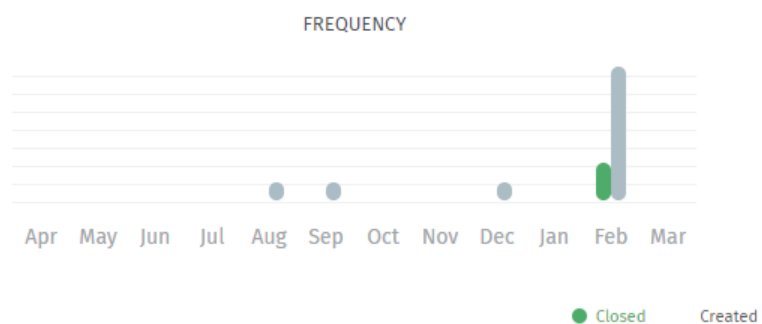


Fig. 4: Clique no botão no painel do chamado para ver um detalhamento das estatísticas da organização.



## CAPÍTULO 16

---

### Verificando suas estatísticas

---

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

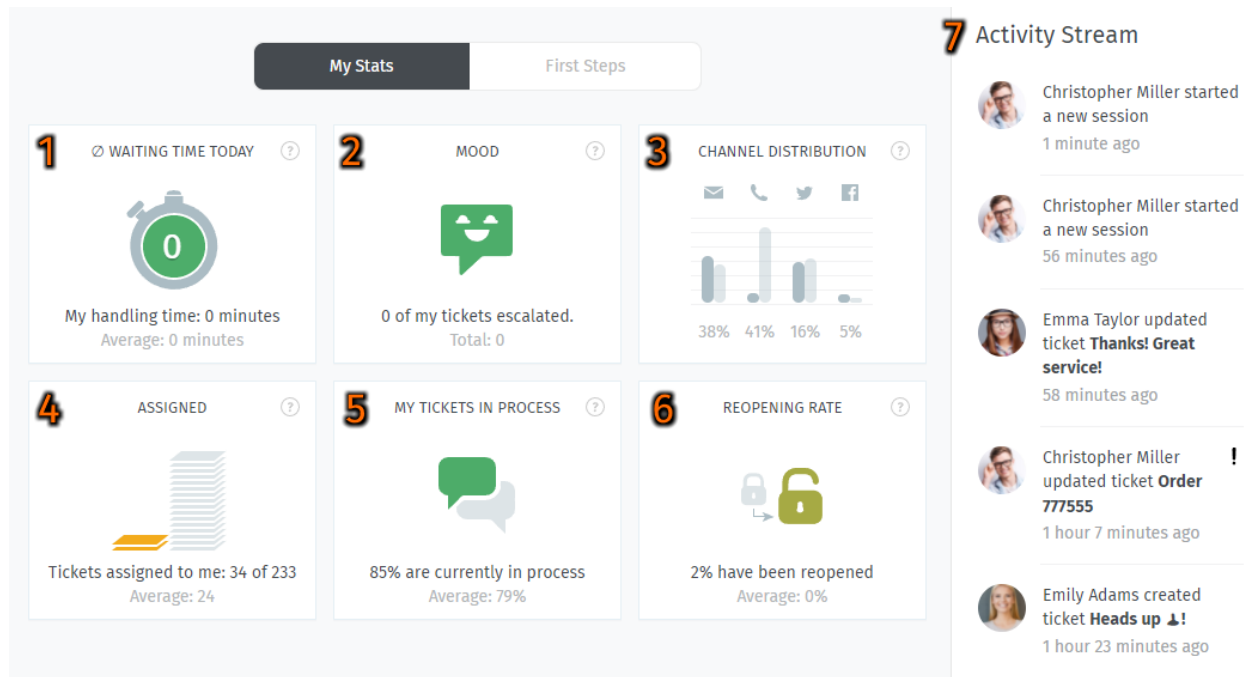


Fig. 1: Check the dashboard for a quick summary of your stats (updated every 30 minutes).

Tabela 1: Legenda

<b>1. Waiting Time Today</b>	Quanto cada cliente tem que esperar, na média, para obter uma resposta sua hoje?
<b>2. Humor</b>	How many escalated tickets do you have open right now? (Mr. Bubbles gets grumpy if you have too many...)
<b>3. Distribuição por canal</b>	Where are all your tickets coming from? (Shows tickets created in the last seven days, also sorted by <b>inbound</b> vs. <b>outbound</b> .)
<b>4. Atribuídos</b>	Out of all open tickets (company-wide), how many are currently assigned to you?
<b>5. My Tickets in Process</b>	What percentage of your tickets have you responded to or updated in the last 24 hours?
<b>6. Taxa de reabertura</b>	How many of your closed tickets have been re-opened in the last seven days?
<b>7. Fluxo de atividades</b>	O que todo mundo na empresa está fazendo?

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.

---

**Nota:** 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

**Nota:** 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.

Tabela 1: Status Icons (Incoming)

	This message was <b>encrypted for you</b> . 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 <b>not encrypted</b> .
	This message's signature has been <b>successfully verified</b> . You can be confident that it's authentic and that the contents have not been modified.
	This message is <b>not signed</b> .





### 17.2.2 Outgoing

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

**Nota:** 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.

Tabela 2: Status Icons (Outgoing)

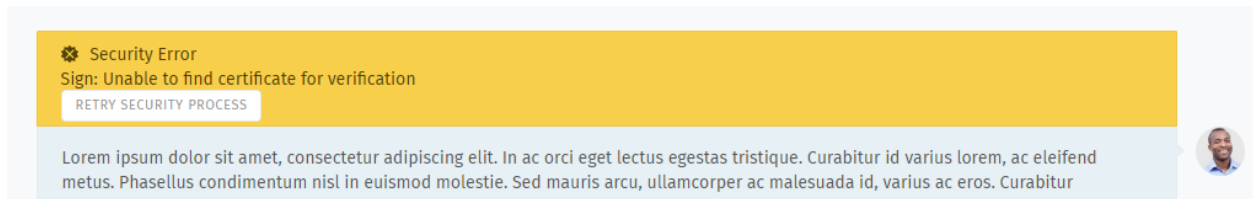
	This message <b>will be encrypted</b> . Even if it's intercepted by a third party (hacker, gov't agency, etc.), they won't be able to read it.
	This message <b>will not be encrypted</b> .
	This message <b>will be signed</b> . Recipients using S/MIME can verify that it came from you and that the contents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



## 17.3 Solução de problemas

### 17.3.1 Incoming

#### “Sign: Unable to find certificate for validation”



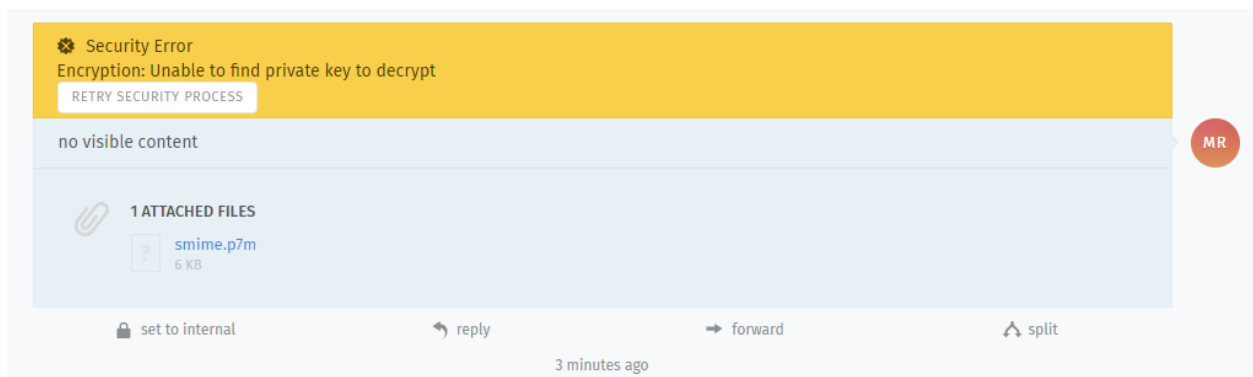
Without the sender’s certificate, Zammad cannot verify the message signature.

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

**Aviso: ALWAYS verify certificates in-person or over the phone!**

The whole point of signature verification is to alert you when someone is trying to pretend to be someone they’re not. Never accept a certificate from someone online without verifying it first.

#### “Encryption: Unable to find private key to decrypt”



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

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

**Dica: 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.

## CAPÍTULO 18

---

### Shared Drafts

---

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

---

**Nota:** 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](#).

---

---

**Dica:** 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 save this in your personal draft. You then can share this as a shared draft if you want to.

User drafts are *always* available!

---

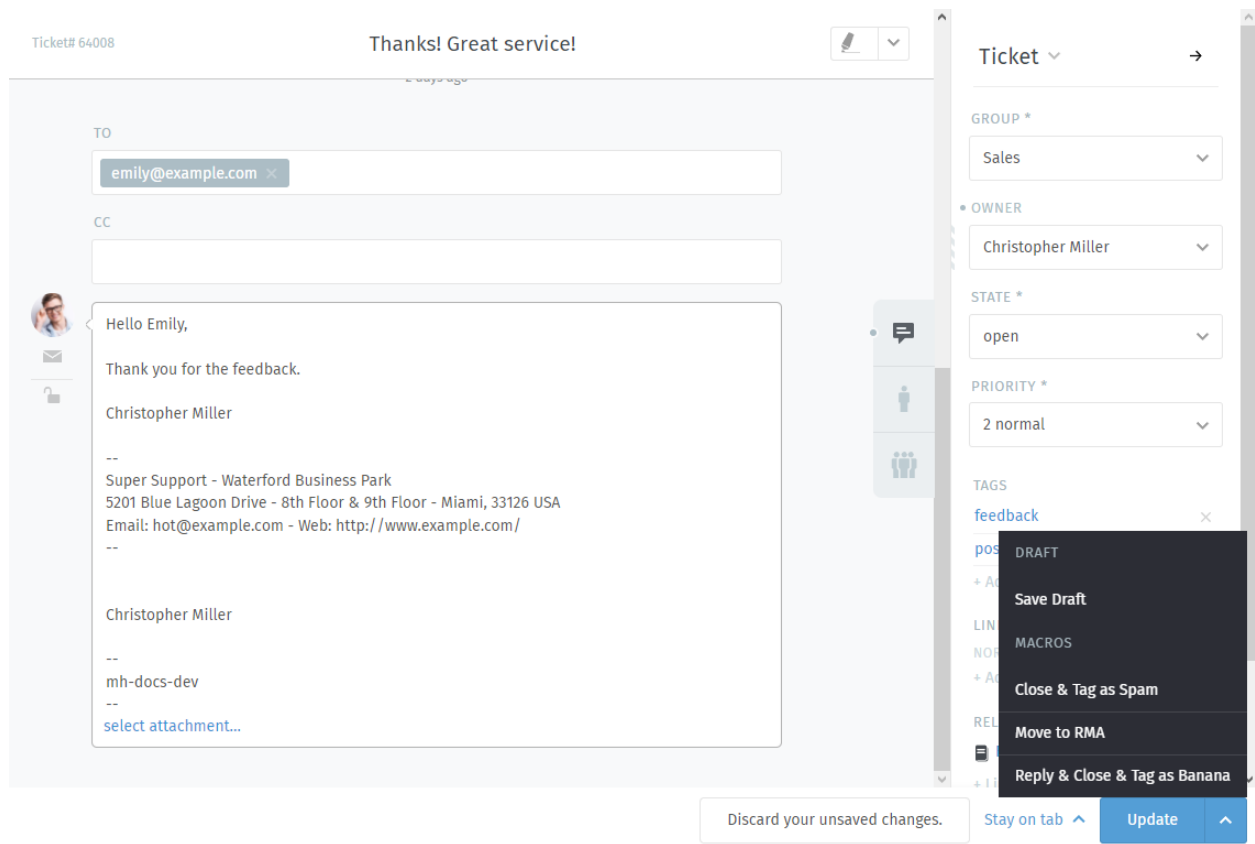



Fig. 1: By using  next to the “Update” button Zammad will provide you with an option to save your draft (and thus share it) if the option is enabled.

## 18.1 Handling drafts

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

### Load a draft

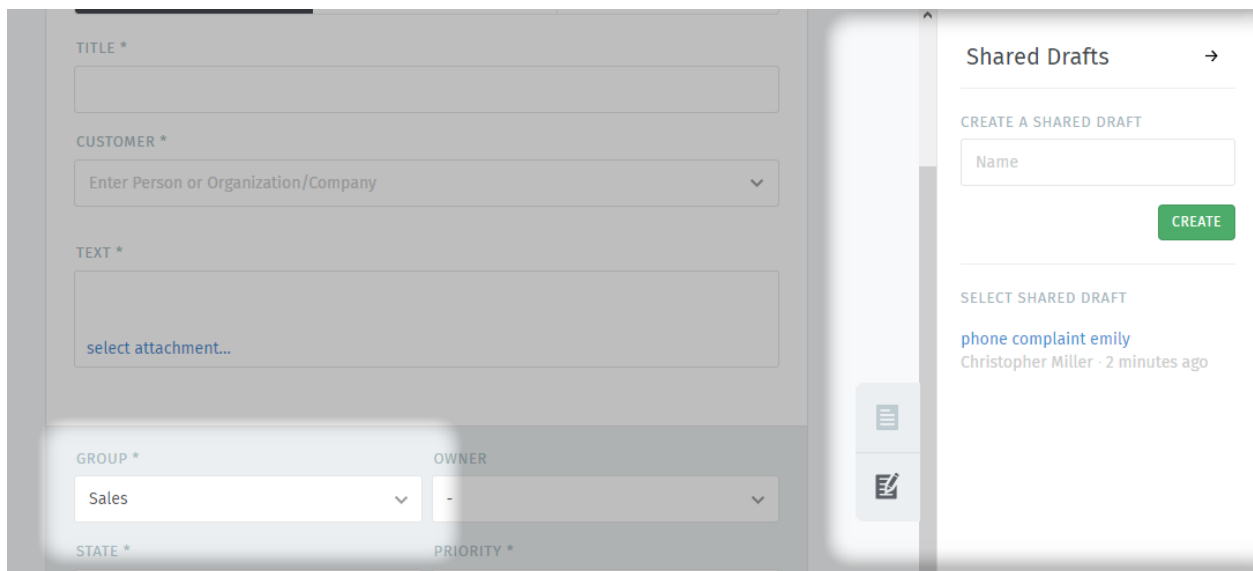
Loading a draft works the same starting from draft previews.

**Aviso: 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.

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

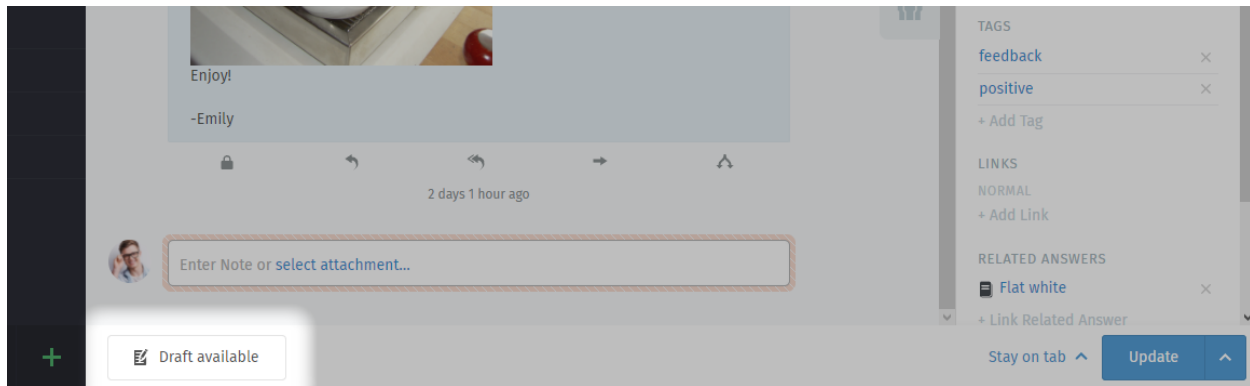


**Existing tickets (Ticket zoom)** Within ticket zooms a button “Draft available” will be shown if a draft has been shared by either you or another agent on the ticket.

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

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

**Aviso:** 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.

---

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

---


## 18.2 Saving drafts

### **Aviso: 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.

---

**Dica:** 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.

## 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.*  
--

[Cancel & Go Back](#) [Delete](#)

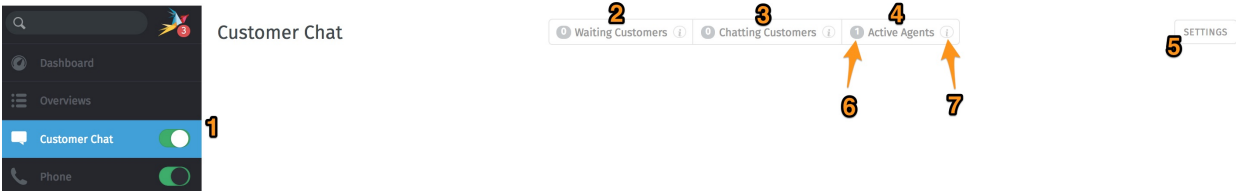
Apply





Bate-papo

Converse com os clientes em tempo real a partir do painel de **bate papo com o cliente**.



Controles de bate-papo	
1. Liga/Desliga	Ativar/desativar o painel de chat. (Quando ativado, você receberá notificações para os chats recebidos.)
2. Clientes aguardando	Apresenta a lista de clientes que aguardam um agente para o bate-papo. <b>Clique para responder um pedido de bate-papo.</b>
**3. Clientes em bate-papo	Apresenta a lista de clientes em sessões de bate-papo atualmente.
4. Agentes ativos	Lista todos os agentes com bate-papo habilitado.
5. Configurações	Clique para acessar as opções de bate-papo (por exemplo, saudação automática e número máximo de bate-papos simultâneos).
6 Indicador de quantidade	Exibe o número de usuários em cada seção.
7 Cartão de informação	Mova o mouse sobre o ícone para obter informações sobre os usuários em cada seção.

**Nota:** Heim? Eu não vejo nenhum menu de “Bate-papo” com o cliente...

Este recurso é **opcional**; Se você não o vê no menu, significa que o administrador ainda não o ativou. Administradores podem saber mais [aqui](#).

**Aviso:** Se todos os agentes estiverem com o painel de bate-papo desativado, os clientes **não** poderão iniciar bate-papos.

### Dica:

- Utilize a *barra de pesquisa* para localizar os registros de bate-papos no arquivo a qualquer momento.
- Copy & paste **supports inline images** as well as plain text.
- Os bate-papos suportam *módulos de texto*.
- Os bate-papos podem ser **renomeados** ou **rotulados** e armazenar detalhes técnicos sobre conexão do cliente.

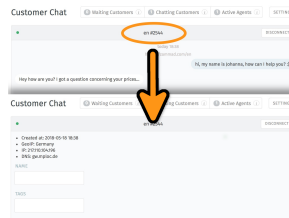


Fig. 1: Clique no título no topo da janela de bate-papo para editar os detalhes.

---

## 19.1 Criando um chamado a partir de um bate-papo

Uma vez que a sessão de bate-papo terminar, você poderá criar um chamado com apenas um clique:

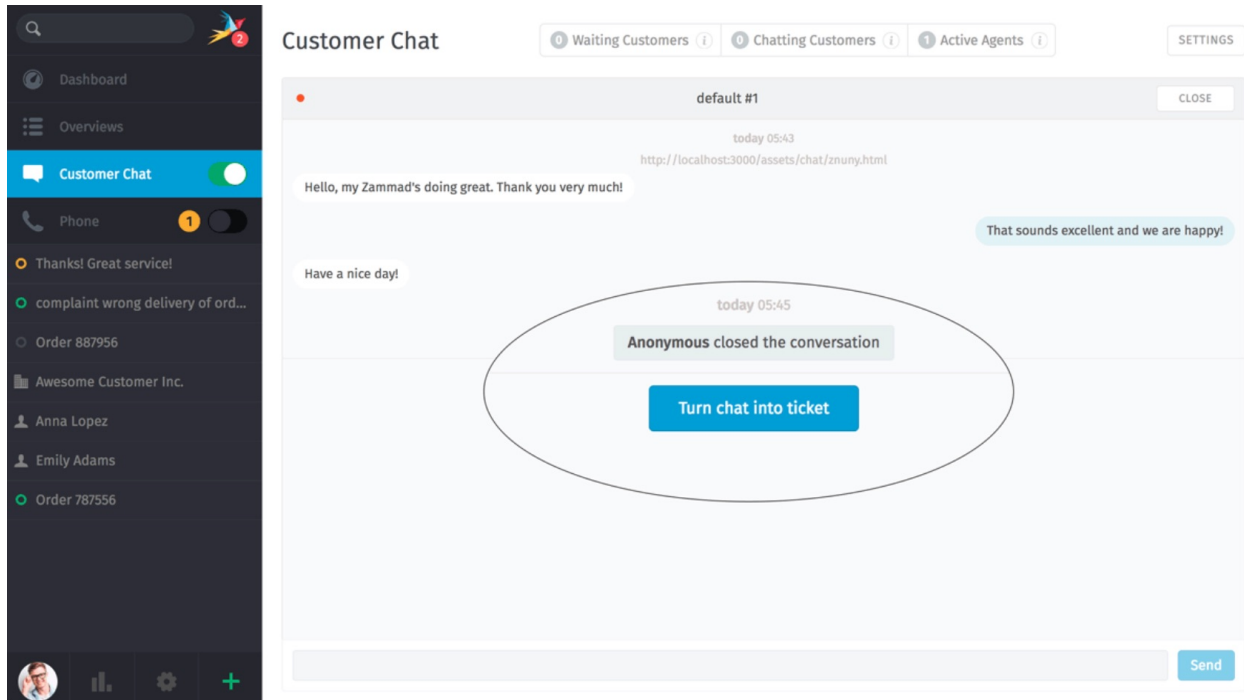


Fig. 2: O botão **transformar o bate-papo** em um chamado aparece tão logo a sessão de bate-papo for concluída.

## New Ticket

Received Call

Outbound Call

Send Email

TITLE \*

CUSTOMER \*

TEXT \*

[https://support.zammad.com/#customer\\_chat/session/2543](https://support.zammad.com/#customer_chat/session/2543)

[select attachment...](#)

GROUP \*

-

OWNER

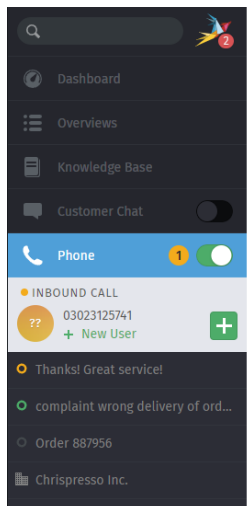
-

Fig. 3: Um link para os registros do bate-papo será incluído como a primeira nota no novo chamado.



## Registro de Ligações

Veja e gerencie os registros de ligações a partir da aba **Telefone**.



The screenshot shows a sidebar on the left with the 'Phone' tab highlighted. The main area displays the 'Caller log' table.

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

Fig. 1: Habilite a aba **Telefone** para receber notificações de chamadas de entrada.

**Nota:** Hum? Eu não vejo nenhuma aba **Telefone** no 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](#).

**Dica:** 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.

---

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




---

---

**Nota:** 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						
<input type="checkbox"/>	FROM	TO	STATUS	WAITING	DURATION	TIME
<input checked="" type="checkbox"/>	 Anna Lopez (Awesome Cu... 03023125771	 Chris 02214710334		00:11	00:23	15 minutes ago
<input checked="" type="checkbox"/>	 maybe: Marcel Herrguth 03023125288	 chris@chrispresso.com 02214710334		00:19	00:33	17 minutes ago

---

**Dica:** 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.)

---

**Nota:** Existing caller log entries *are not* updated.

---

---

## Perfil e configurações

---

Clique no seu avatar na parte inferior do menu principal par acessar seu **perfil e configurações**.

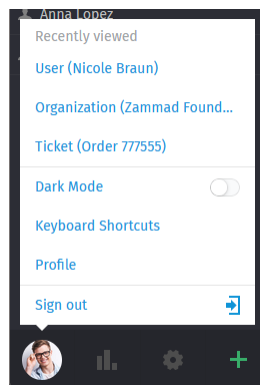


Fig. 1: Encontre ações específica do usuário, uma lista de itens abertos recentemente e informações de referência úteis.

Clicking on your avatar picture provides the following three sections.

**Recently viewed** All information you've viewed previously (tickets, users, organizations). Helps you to jump back quick and easy without searching or looking in your overviews.

---

**Nota:** This list is limited, old entries will automatically vanish.

---

### Further actions

**Dark mode** Quickly toggle dark and light mode without using keyboard bindings.

**Keyboard shortcuts** *Opens the keyboard shortcut section.*

**Profile** This will open your *Configurações de perfil* and provide further options for customers and agents.

---

**Nota:** Customers do not have access to all areas, even if you provide them the permissions to those areas.

---

**Sign out** Finished working with Zammad? Use the sign out button to end your user session.

---

**Dica:** If you didn't tick "Remember me" during login or used a third party login, your session will automatically be invalidated if you close and reopen your browser.

---

## 21.1 Configurações de perfil

### Appearance

**Theme** Select how Zammad should look. Zammad will remember the setting you choose here.

- Dark
- Light
- Sync with computer

For dark and light you'll fix the dark or light mode to your taste.

If you choose sync with computer, Zammad will dynamically select the mode depending on what your client prefers at that moment.

---

**Nota:** Synchronizing the theme preference highly depends on your browser. If your browser does not support syncing, this setting basically has no effect.

Most common modern Browsers do so (e.g. Firefox, Google Chrome)

---

**Idioma** Determina a linguagem de exibição do sistema.

**Avatar** Carrega uma imagem de avatar.

**Senha** Altera a sua senha de entrada (pode ser desabilitado por administradores do sistema).

**Notificações** Determina onde, quando e para quais grupos você quer receber notificações ou altere o som de notificação.

---

**Nota:** Notifications are available to agents only.

---

---

**Dica:** The contents of these email notifications can be customized on self-hosted installations. Administrators can learn more [here](#).

---

**Fora do escritório** Schedule absence periods in advance, and designate a substitute to handle your tickets while you're gone.

O seu substituto irá receber todas as suas notificações durante a sua ausência e terá uma personalizada [visão](#) criada para ajudar a cuidar dos seus chamados.

---

**Nota:** You **will** continue to receive notifications while you are absent.

---



## Notifications

	MY TICKETS	NOT ASSIGNED*	ALL TICKETS*	ALSO NOTIFY VIA EMAIL
New Ticket	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket update	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket reminder reached	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ticket escalation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>




Fig. 2: Utilize as três primeiras colunas para escolher quando receberá **notificações internas** (abaixo). A coluna mais à direita habilita notificações por e-mail, também.

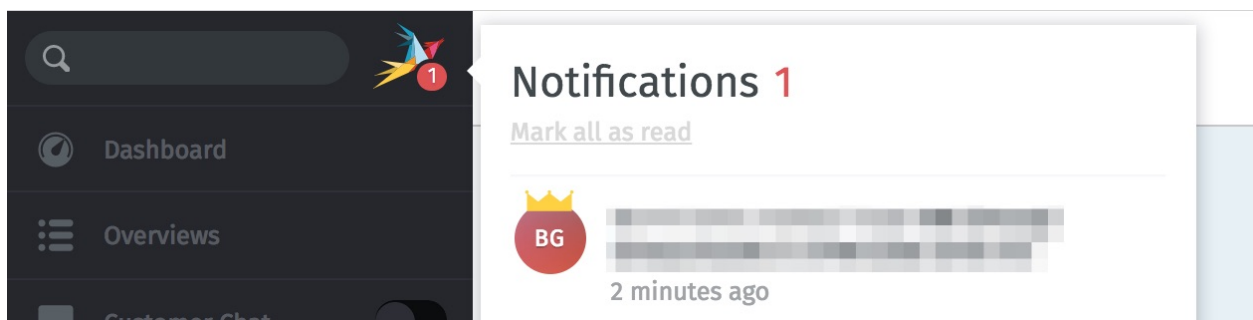


Fig. 3: Notificações internas não podem ser desabilitadas.

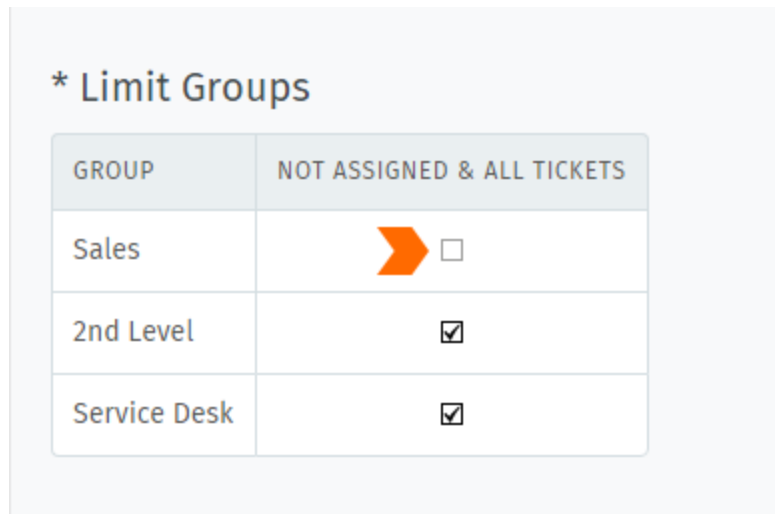


Fig. 4: By default, you will receive notifications for all tickets on every group you belong to—even for tickets that are assigned to other agents. Use the **Limit Groups** box to disable such notifications on a per-group basis. (You will continue to receive notifications for your own tickets.)

**Overviews** Tired of the overview order your admin decided on? This section allows you to choose an overview order that fits you the best.

You can revert to the default instance ordering at any time by using the upper right button “Reset overview order”.

---

**Dica:** Your admin has no power here

The order does not change, even if your admin renames or reorders the overviews. The overview order is stored in your profile and thus applies for any device you use with your account.

---



---

**Nota:** Can't see this setting?

This setting option is only available to agents by default. Admins can also deactivate this permission entirely. Ask your admin to enable this option if you need it.

---

**Calendário** Add your ticket deadlines to your own favorite calendar app with the ICAL link listed at this setting's panel.

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

**Acesso por token** Generate personal access tokens for third party applications to use the Zammad API.

**Cuidado:** Sempre gere um novo token para cada aplicação que você deseja conectar ao Zammad! (Isso torna possível revogar o acesso de uma aplicação por vez se um token for comprometido)

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

### Knowledge Base

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

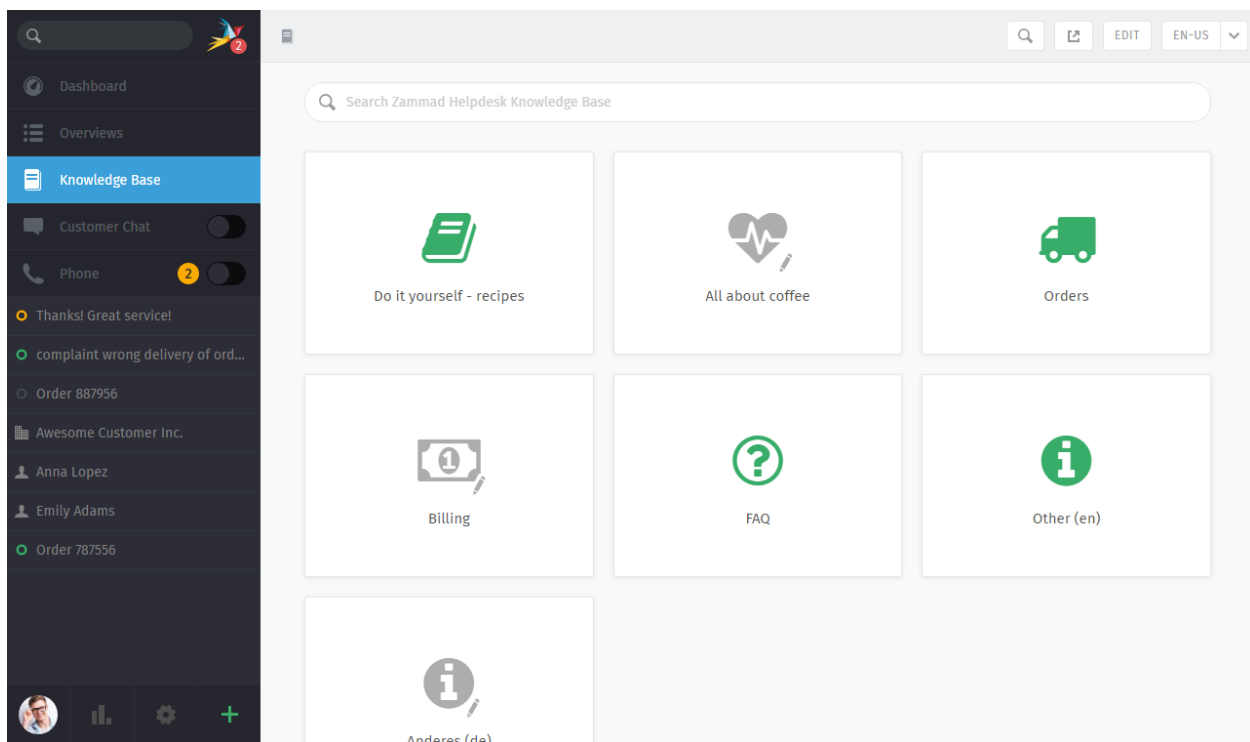


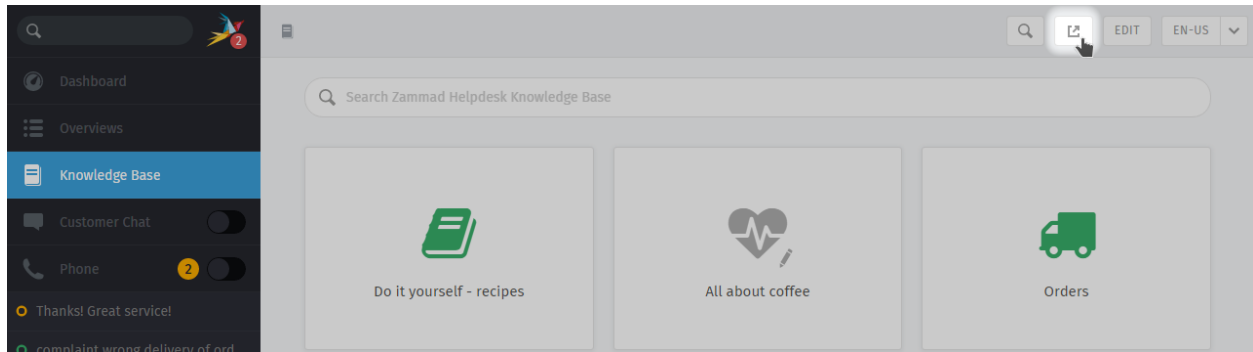
Fig. 1: The knowledge base panel begins in **Preview Mode**. With some small exceptions, Preview Mode shows what the published knowledge base will look like.

**Nota:** 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



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

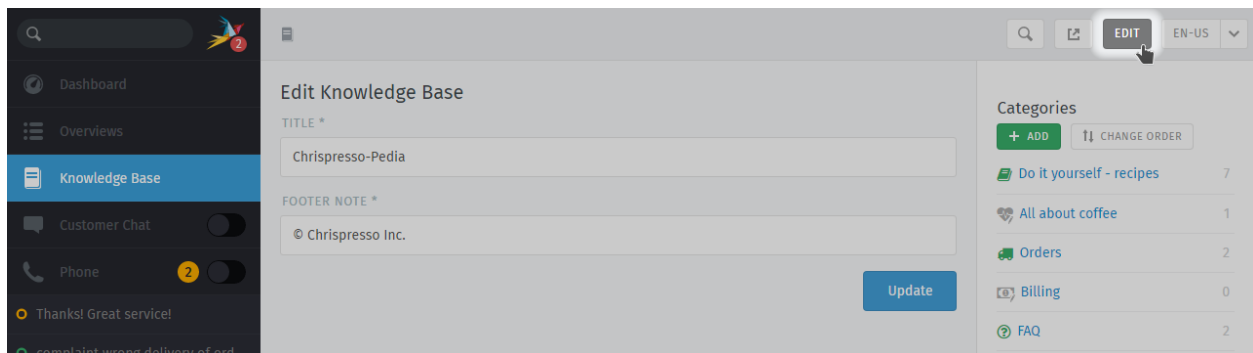


Fig. 2: In Edit Mode, use the righthand menu to navigate through the knowledge base.

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

---

**Nota:** 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.

---

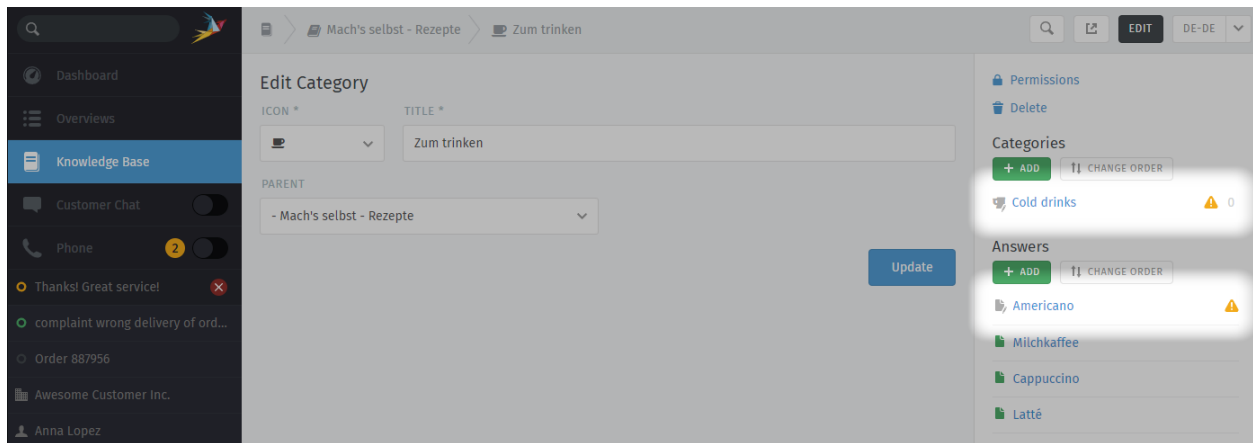
### 22.1.1 Switching Languages

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

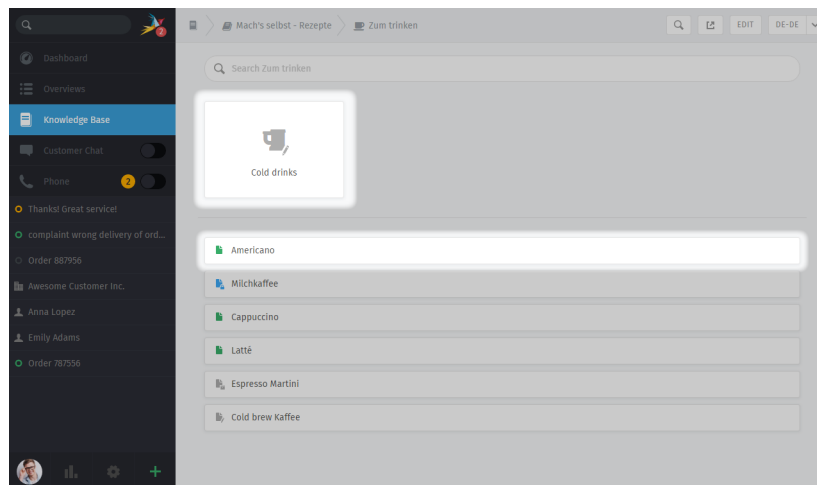
---

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

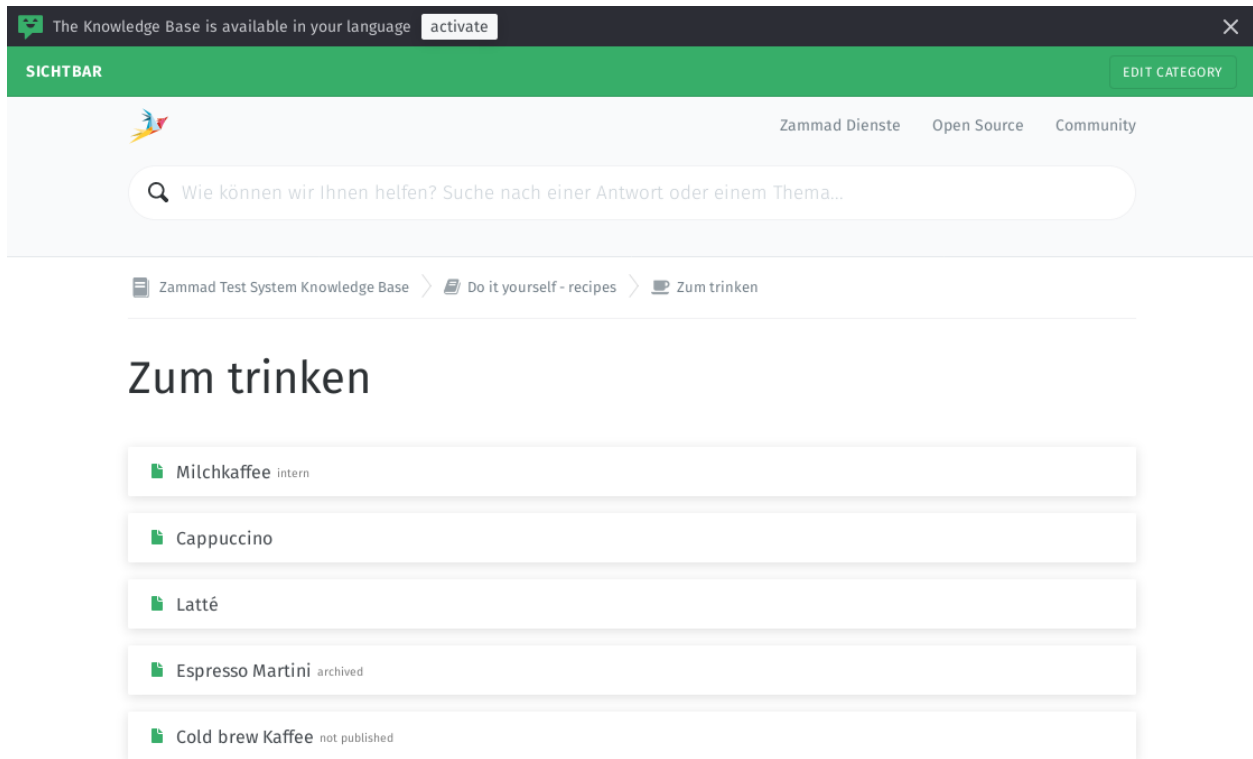
in **Edit Mode** Untranslated pages are marked with a **warning sign**:



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



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



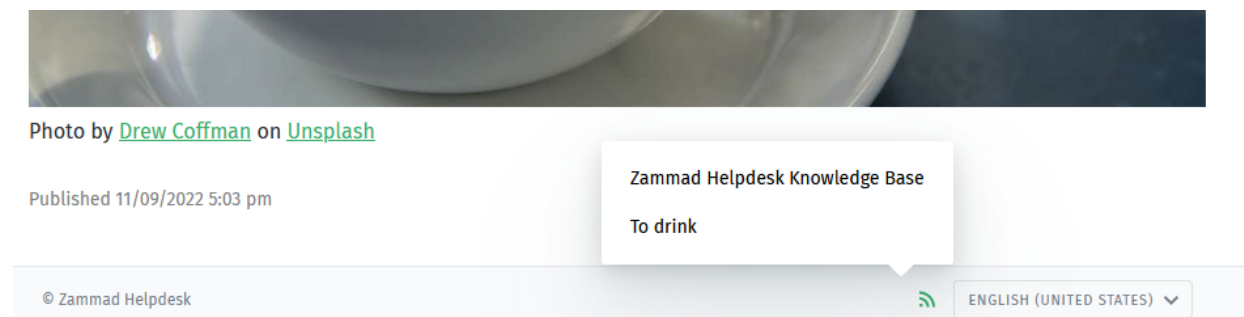
The screenshot shows the Zammad Knowledge Base interface. At the top, there's a dark header with a message: "The Knowledge Base is available in your language" and an "activate" button. Below this is a green bar with "SICHTBAR" on the left and "EDIT CATEGORY" on the right. The main content area has a search bar with the placeholder text "Wie können wir Ihnen helfen? Suche nach einer Antwort oder einem Thema...". Below the search bar is a breadcrumb trail: "Zammad Test System Knowledge Base > Do it yourself - recipes > Zum trinken". The title "Zum trinken" is prominently displayed. Below the title is a list of five articles, each with a green icon and a title: "Milchkaffee intern", "Cappuccino", "Latté", "Espresso Martini archived", and "Cold brew Kaffee not published".

### Using RSS Feeds

Zammad allows you to subscribe to either the knowledge base as whole or to specific categories. There's both a public and an internal option to do so.

#### Public RSS function

The RSS button of the public knowledge base page is located at the bottom of each page. If enabled, the button will be available to anybody visiting the page.



The screenshot shows the footer of the Zammad Knowledge Base page. It includes a photo by Drew Coffman on Unsplash, published on 11/09/2022 at 5:03 pm. Below the photo is a white box with the text "Zammad Helpdesk Knowledge Base" and "To drink". At the bottom, there's a footer bar with "© Zammad Helpdesk" on the left, an RSS icon in the center, and a language selector dropdown set to "ENGLISH (UNITED STATES)" on the right.

#### Internal RSS function

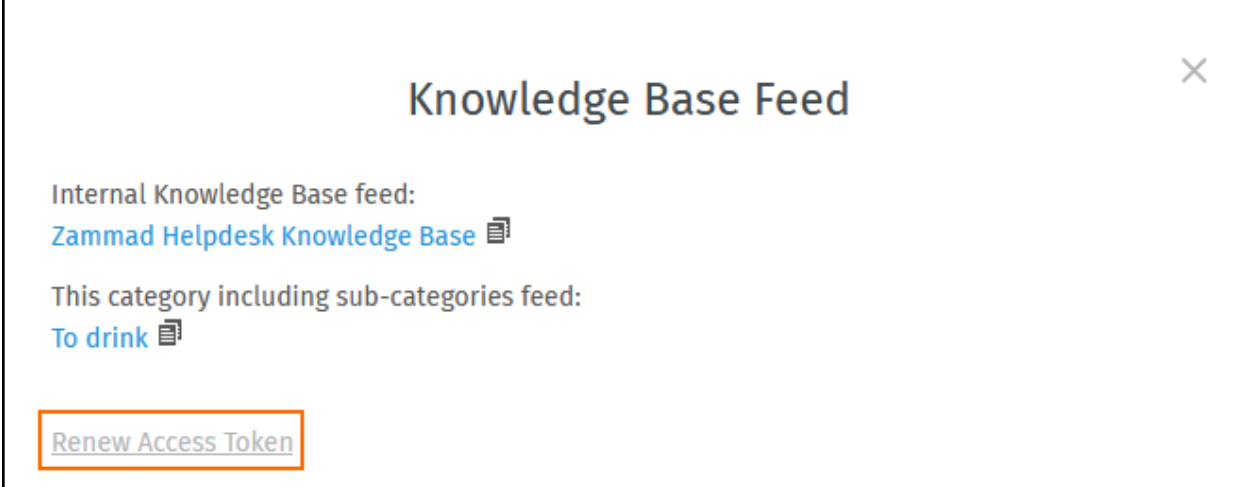
The internal RSS button can be found on the upper right next to the edit button. It's available on every internal knowledge base page you display.

Pressing the the RSS button will provide up to two RSS feeds to subscribe to.



**Aviso:** Keep in mind that internal RSS links contain **personal** access tokens. **Never share these URLs with third parties!**

If you want to revoke the access and renew your token, you can do so in the RSS modal.



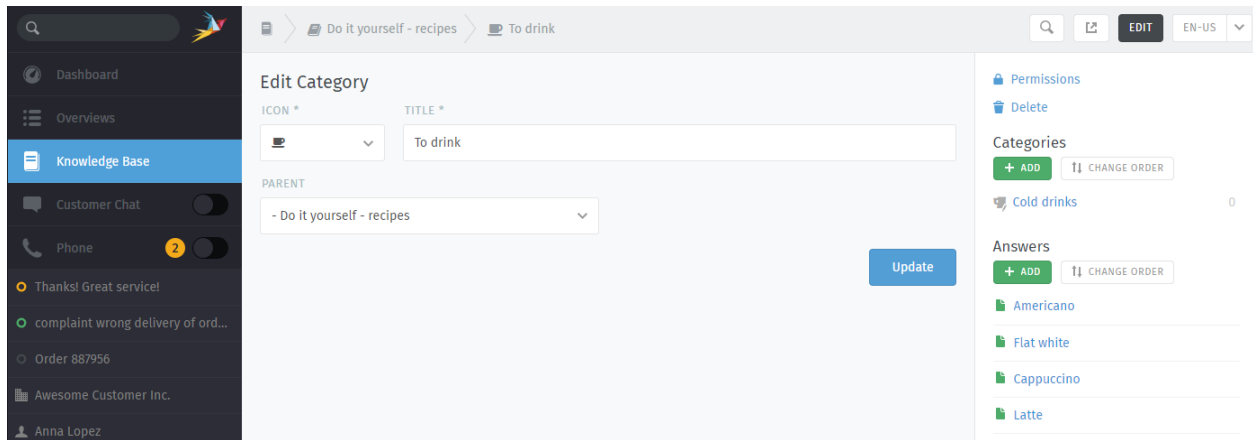
**Nota:** Huh? I don't see an "RSS" button...

By default, RSS feeds are disabled. If you wish to use the RSS function, talk to your administrator about enabling the function.

## 22.2 Editing Categories

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

**Nota:** 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.

---

#### Dica:

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

---

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#### **Note:** Roles require knowledge base reader permission

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

#### **Perigo:** Beware of visibility levels

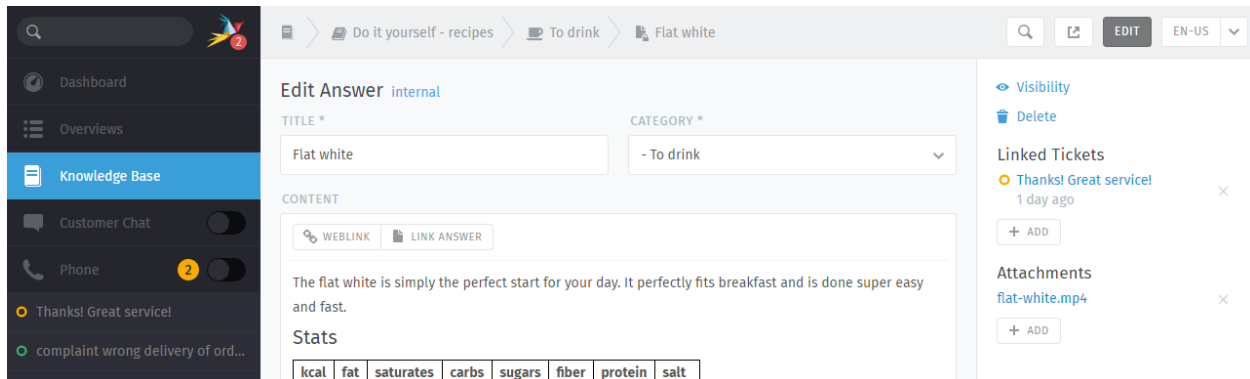
Knowledge base reader permission means that affected users can see **internal answers**. This is a potential issue if you're not dividing carefully!

If you're unsure, please ask your administrator to configure the [role permissions](#) accordingly.

---



## 22.3 Editing Answers



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!

### Dica: 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.

**Dica:** 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:

	<b>Public</b> (visible to everyone)
	<b>Internal</b> (visible to agents & editors only)
	<b>Draft/Scheduled/Archived</b> (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

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## i-doit: Use Tickets to Track Company Property

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

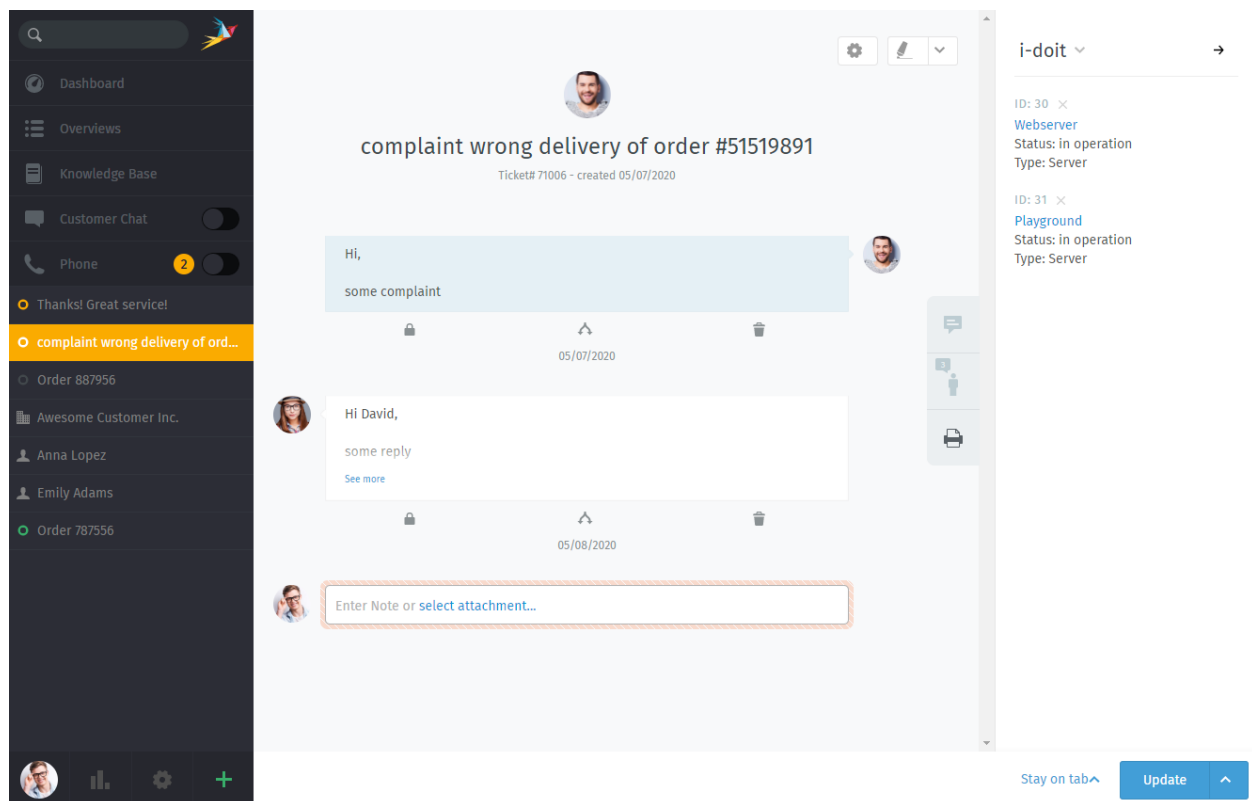


Fig. 1: Use the **printer** tab to view or manage a ticket's assets from i-doit.

---

**Nota:** 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?

---

**Dica:** 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.




---

### Integração GitHub / GitLab

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Com a integração do rastreador de problemas, você pode monitorar os problemas do GitHub / GitLab diretamente de um chamado do Zammad.



---

**Nota:** Oops? Não encontrei as guias  ou 

Este recurso é **opcional**; se você não o vir no painel de chamados, significa que seu administrador ainda não o habilitou. Os administradores podem aprender mais *aqui* <<https://admin-docs.zammad.org/en/latest/system/integrations.html#integrations-for-issue-trackers>> \_.

---

### 24.1 O que isso pode fazer?

**Ver questões relacionadas** Use as guias  e  no painel do chamado para ver os problemas vinculados, junto com metadados como status (aberto/fechado), responsável, etiquetas e muito mais. Ou simplesmente clique no título para visualizar o problema no GitHub/GitLab.

Um emblema no ícone da guia indica quantos problemas estão vinculados a este chamado.

**Vincule um novo problema** Na parte superior do painel do chamado, selecione **GitHub/GitLab > Vincular problema** e insira um URL de problema válido.

---

**Nota:** Às vezes, vincular um novo problema pode ser lento.

---

**Remova um problema** Clique no botão × próximo ao título de um problema para desvinculá-lo.

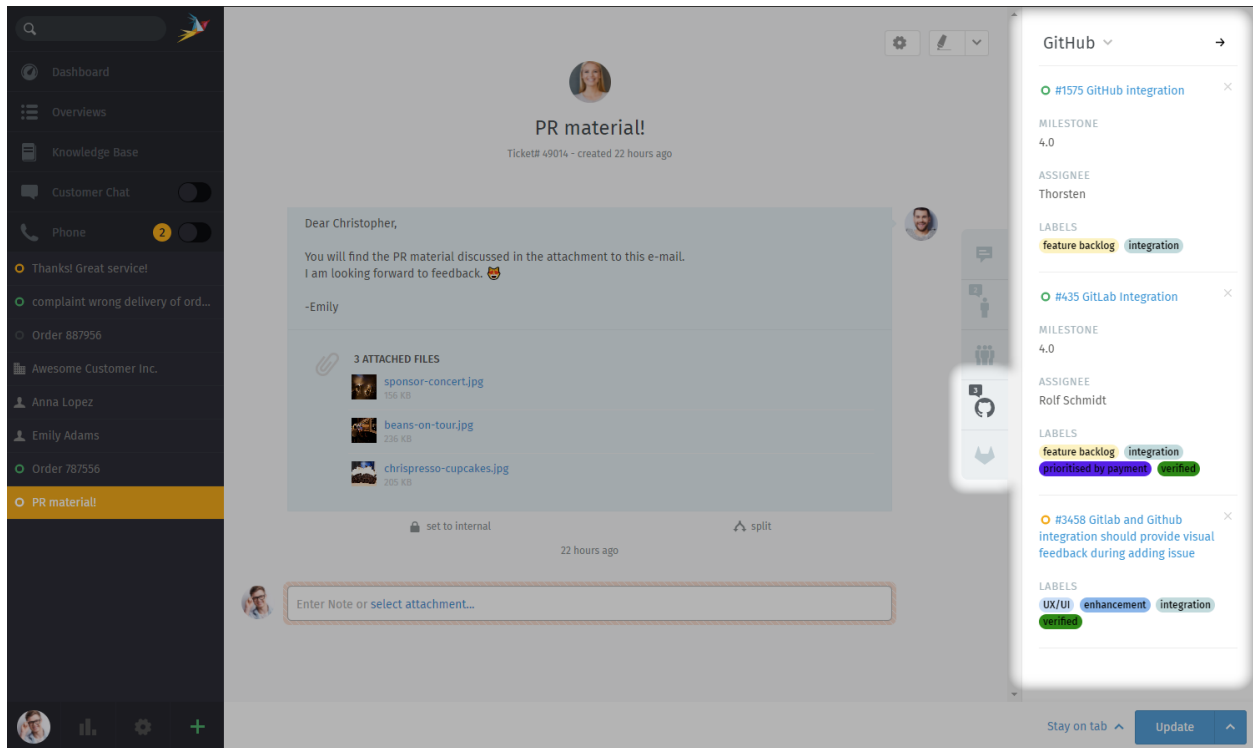




Fig. 1: Use as guias  e  no painel do chamado para uma visão geral dos problemas relacionados ao mesmo.