End-user’s guide

How to use this document

This document is provided as a courtesy to help you train your end-users. Since there are many ways to configure your Zendesk Web portal, it was written to be as generic as possible. You may not have enabled some of these end-user facing features, for example.

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Registering and logging in to the help desk

To submit and then track your support requests, you need to sign up and create a user account. We just need your name and email address and then we'll verify your account.

How to sign up

1. Select the **Sign Up** link (located above the menu bar) and you'll see the sign up page.

2. Enter your name and email address.
3. You may also be prompted to enter other online identities such as your Twitter account. Doing so means that you can also submit support requests using these other accounts and the help desk will know that it's coming from you and not create a new, separate account.
4. You can add your Twitter or other accounts later by updating your user profile (see Logging in using external accounts). Verify your sign up request by entering the two security words and then click **Sign Me Up!**.

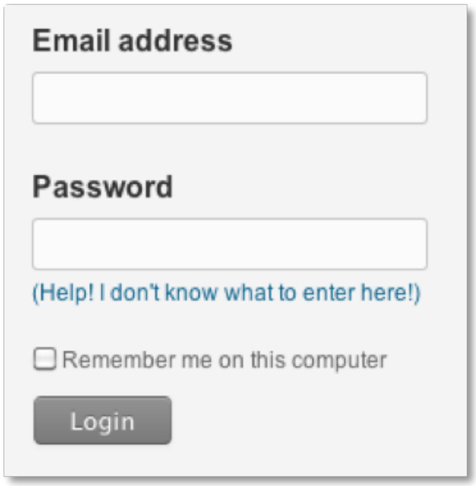
You'll receive a welcome email at the email address you entered in the sign up form. Click the link in the email to create a password and log in to the help desk.

About your password

You'll be prompted to enter a password of a certain length and complexity based on the help desk's password security requirements. Once you create a password, you can log in and start using the help desk.

You can always change your password later by logging in to the help desk and updating your user profile (see Changing your password).

If you forget your password, just click the **Login** link (located above the menu bar) and then select the **Help! I don't know what to enter here!** link. You'll be prompted to enter your email address (it has to be same address you used to sign up) and you'll receive an email that contains a link to create a new password.



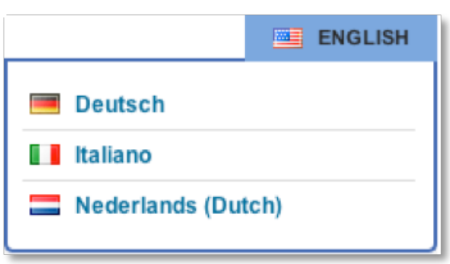
Logging in to the help desk

To log in to the help desk, enter your email address and password. You may also be able log in using other popular services such as Twitter and Facebook. If these services are available, they'll be shown on the login page.

You'll need to step through a short authorization process for each service before you can log in to the help desk.

Choosing your language preference

The help desk may support your native language. If it is supported, you can select your language as the default language for your help desk. You'll see a language selector in the menu bar.



Select your language from the list and your help desk immediately displays the language you've chosen.

As a registered user, your selection is saved and your language is displayed each time you log in to the help desk.

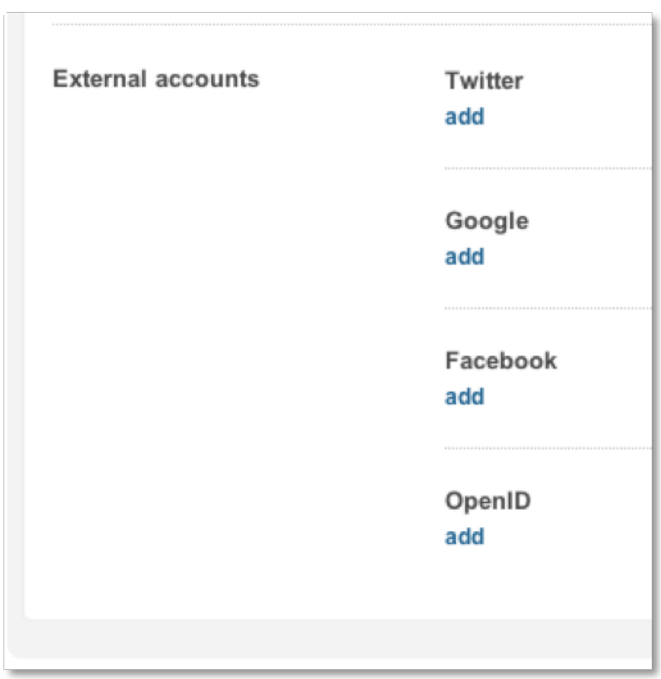
Logging in using external accounts

You may also be able to log in to the help desk using your Twitter, Facebook, Google, and OpenID accounts. If any of these log in options are available, they are shown on the log in page.

To log in using these external accounts, you first need to set them up to authorize the help desk to use them. You can do this by adding them to the **Identities** tab of your user profile.

To set up external accounts

1. Log in to the help desk.
2. Select the **Profile** link (located above the menu bar).
3. Select the **Identities** tab.
4. In the **External Accounts** section, locate the external account you want to set up and then click **Add**.



5. Follow the prompts to log in to your external account and authorize the help desk to use the account. The authorized account is added to the **Identities** tab.
6. The next time you log in to the help desk, click the external account that you want to use to log in.

Changing your password

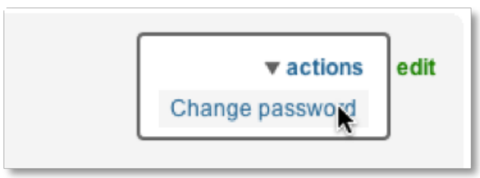
You can change you password at any time by logging in to the help desk and updating your user profile.

To change your password

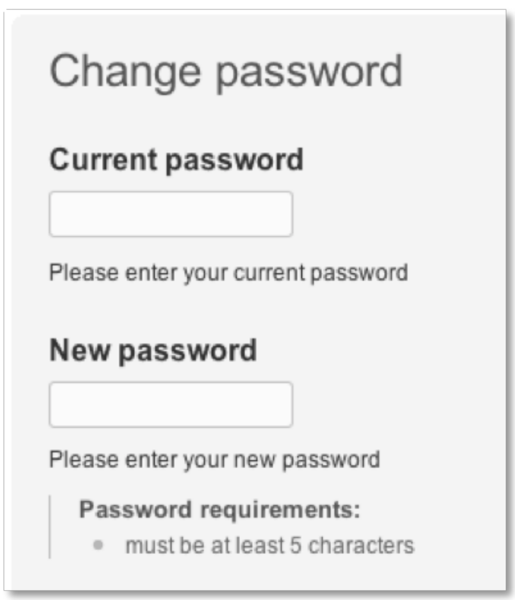
1. Log in to the help desk.

If you've forgotten your password, you can request to have your password reset by clicking the **Help! I don't know what to enter here!** link on the login page.

2. After you've logged in, select the Profile link (located above the menu bar).
3. To change your password, select **Actions > Change Password**.



4. You'll be prompted to enter your current password and then a new password.



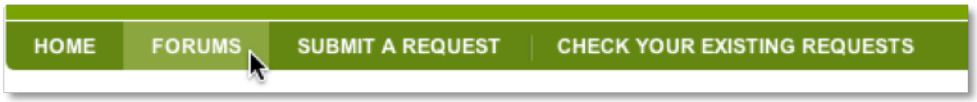
5. Click **Change Password**.

Searching the knowledge base for answers

Others may have already experienced the support issue you're having and there may be a knowledge base article describing how to deal with it. If so, you may not need to request support at all, just locate the answer in the knowledge base.

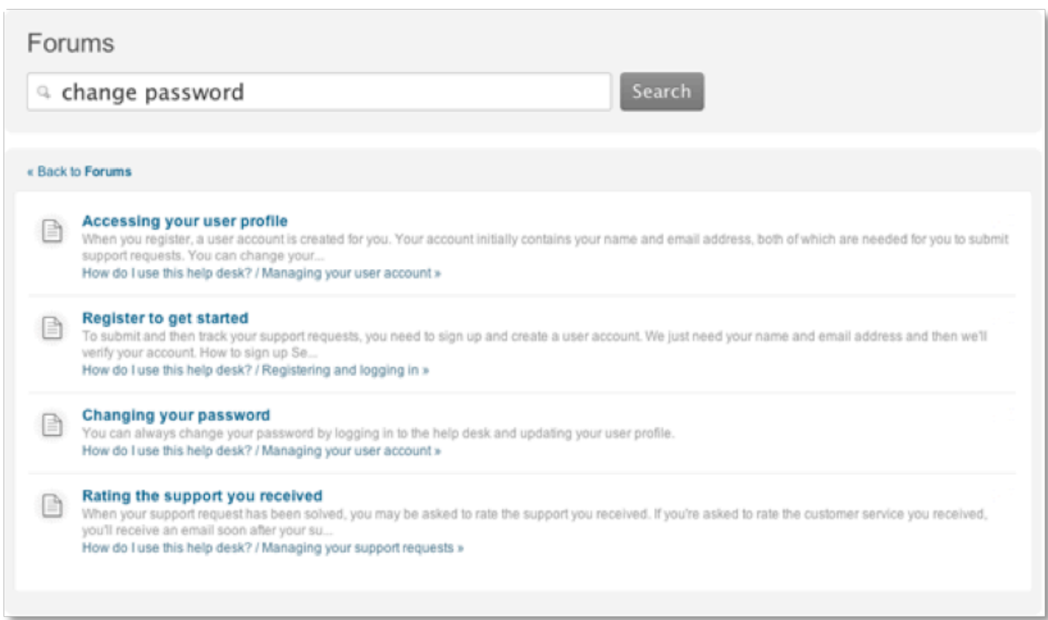
How to search the knowledge base

1. Select **Forums** from the menu bar.



2. The Forums search box is at the top of the page. Enter words that describe your issue. Be as specific as possible.

3. Knowledge base articles that contain those words appear. You can then read the articles to see if your question has already been answered.



4. Some articles allow you to add comments. If you have a related question, scroll to the bottom of the article and then click **Add a comment**. You may receive an answer to your question from a support agent or another customer. When you add a comment to an article, you are subscribed to it and updates made to the article are sent in email so that you are immediately notified.

Creating your first support request

Once you've signed up, you can submit support requests. You can request support using the support form, by sending email, and by using the Feedback Tab.

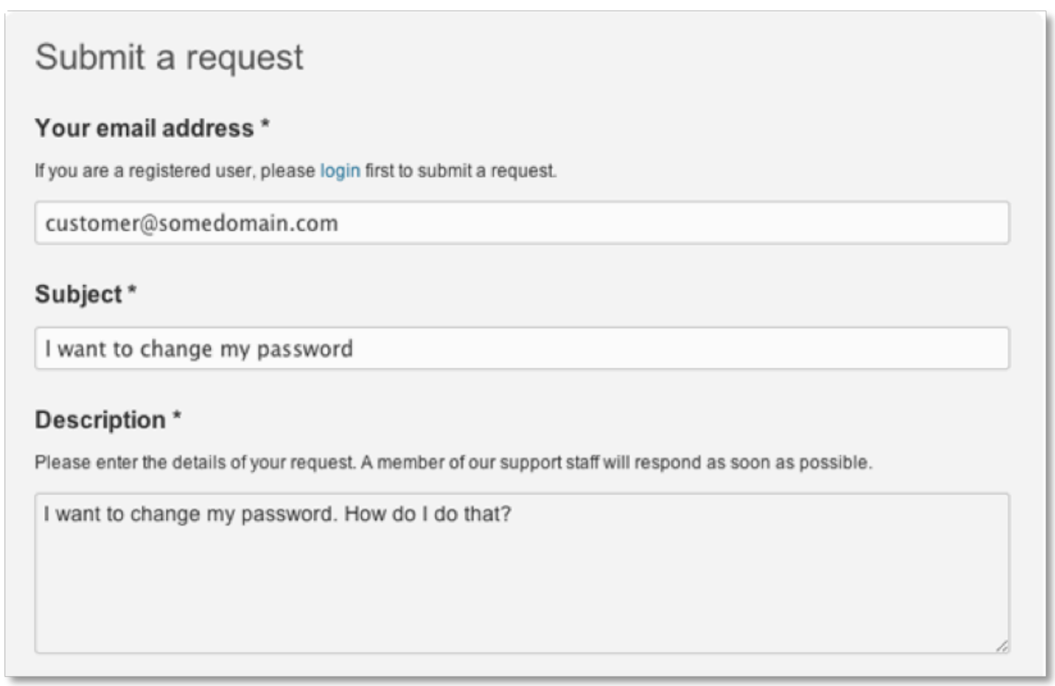
Submit a support request using the support form

If you can't find an answer to your question in the knowledge base, you can open a new support request.

How to request support via the web form

1. Select **Submit a Request** from the menu bar.

2. If you aren't already logged in, click the **Login** link. If you're a new user, you'll be prompted to sign up and create an account when you submit the request.
3. Enter a description of your support issue and enter all other required information.



4. Click **Submit**.

You'll receive a confirmation email shortly after you submit your request to confirm that it has been received. Once an agent is assigned to the request and they have an update for you, you'll receive another email. You and your agent can then communicate back and forth by replying to the most recent email.

Adding attachments

You also have the option of adding attachments to your support requests. When you're filling out the support form, click **Attach file**.

Submit a support request by sending an email message

You can also request support by sending an email directly to the support email address (**INSERT YOUR SUPPORT EMAIL ADDRESS**). Just create a new email message addressed to the help desk, add a subject, and then describe your support issue in the text of the email.

You can add an attachment using your email application.

Sending a support request via email is the same as filling out the web form; you'll receive a confirmation email and then a follow-up email from the support agent assigned to your request.

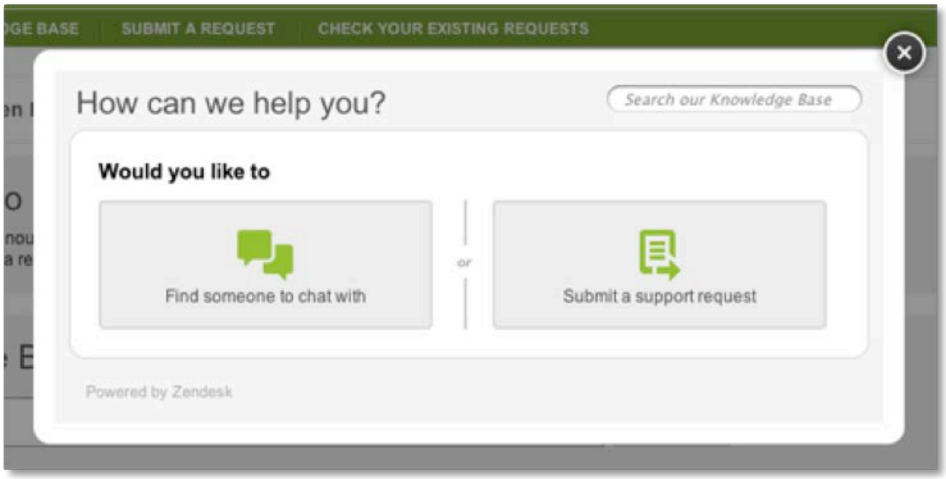
You need to send the email from an account that's already been added to your user profile. If you don't, a new, separate user account is created. A support agent can merge the new account into your original account if this does happen. Create a support request if you need your accounts merged.

You can track all your requests, no matter how you created them, by logging in to the help desk and selecting **Checking Your Existing Requests** (see Tracking your support requests).

Request support using the Feedback Tab

Another option for creating a support request is to use the Feedback Tab, which is located on the side of the browser.

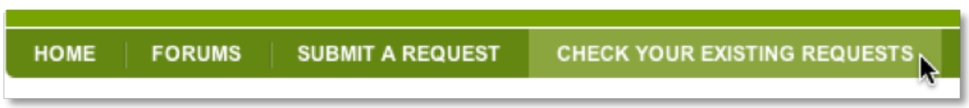
When you click the tab, a new window opens prompting you to search for the answer to your question, submit a support request, or start a chat session with an agent.



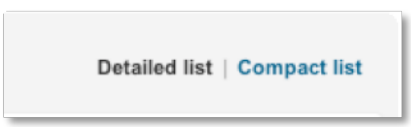
If an agent isn't available to chat with you, you'll be prompted to submit a support request using the support form.

Tracking your support requests

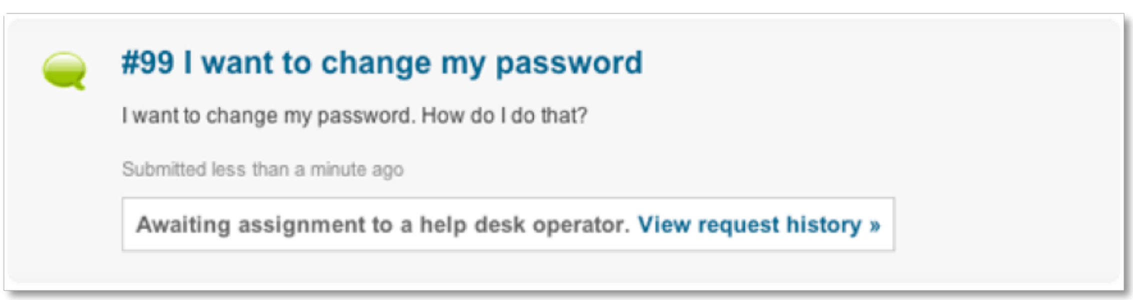
As a registered user of the help desk, you can log in and view all your support requests. When you're logged in, select **Check your existing requests**.



This is a list of all your unresolved support requests. There are two ways to review this list: as a detailed list or as a compact list.

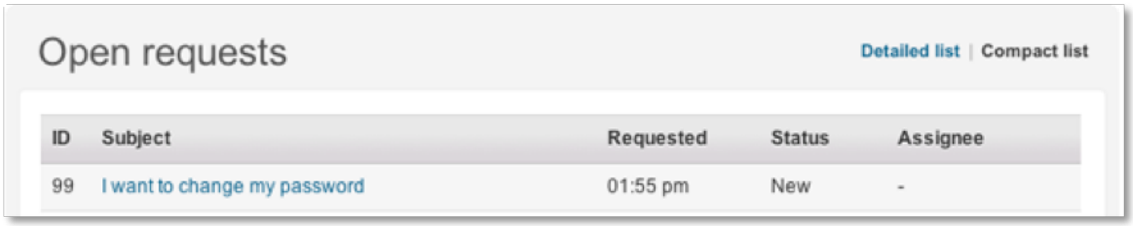


The detailed list displays the titles of the requests and the date they were submitted.

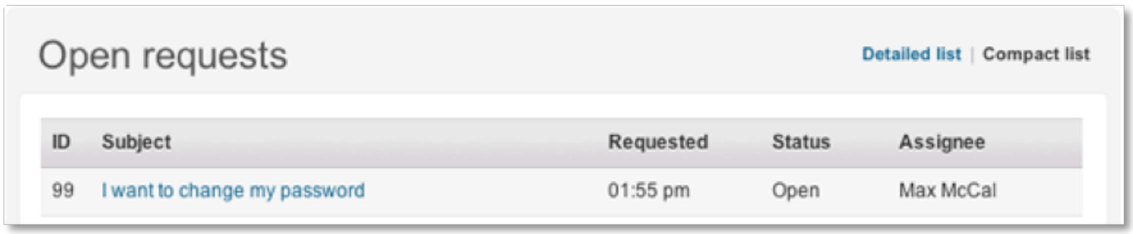


If you click **View Request History**, you can see your original support request and all the comments that you and all support agents who worked on your request have added.

The compact list is a table that shows the request ID, the request subject, the date you made the request, the status, and the assignee (when your request is opened, this is be the agent assigned to the request).



When your request is opened and assigned to an agent, it looks like this:



To see the details of a support request, click its subject.

You can sort the list by clicking on any of the column headings. For example, if you want to view all your requests grouped by their status, just click the **Status** heading.

Statuses are used to indicate steps in the process of resolving your support request.

New means that request was received but that it has not been opened and assigned to an agent. The New status can also indicate that the support team is evaluating it to determine who should be assigned to resolve it.

Open means that the request has been assigned and is now opened and your agent is working to resolve it.

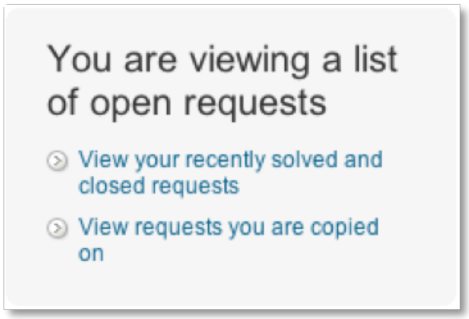
Pending means that the assigned agent has a follow-up question for you. The agent may need more information about your support issue. Requests that are set to Pending remain that way until you respond and provide the information the agent needs to continue resolving your request.

Solved means that the agent has resolved your support issue. All of your solved requests remain in this list until they are closed. You can reopen solved requests until they are closed (see Reopening a solved request).

Closed means just that; your support request is closed and can't be reopened. You can however create a follow-up request for a closed request (see Creating a follow-up request for a closed request).

Viewing your recently solved and closed requests

After you've created requests and one or more of them have been resolved, you can view these requests by clicking the **View your recently solved and closed requests** link.



It's possible to reopen a resolved request (see Reopening a solved request). You can even create a follow up to a request that has been closed (see Creating a follow-up request for a closed request).

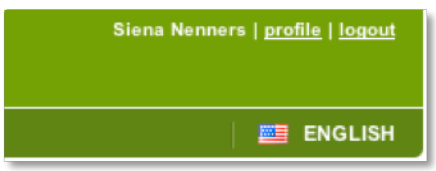
Viewing requests that you are copied on

It's possible to be copied on a request that someone else created. It's like being CC'ed on an email. If you've been copied on any support requests, you can view them by clicking the **View requests you are copied on** link.

You can add comments to requests that you were copied on.

Viewing all of your requests in your user profile

A list of all the requests you created is also available in your user profile. Select **Profile** (located above the menu bar).



Your user profile lists all of your account activity, as shown here:

Your list of support requests shows all the requests you've created, the date you made the request, the time of the last update, and the status (new, open, pending, solved, and closed).

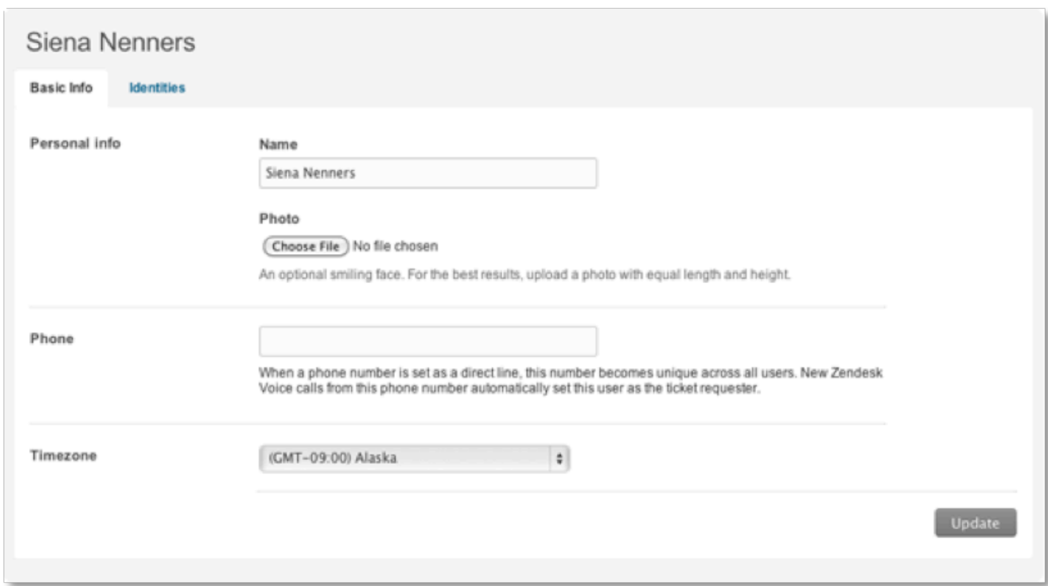
You can view the requests you've been CC'd on, the topics you created in the forums, the forum comments you made, the forum topics you voted for, and the topics you have subscribed to.

Updating your user profile

When you register, a user account is created for you. Your account initially contains your name and email address. You can change your name and the email address you use for support requests by editing your user profile. You can also add a photo, add or change your phone number, and select your time zone.

How to update your user profile

1. Log in to the help desk and select **Profile** (located above the menu bar).
2. Your user summary page is displayed, which contains a list of all your support requests. For more information about this page, see Viewing all of your requests in your user profile.
3. To edit your account, click **Edit**.
4. On the **Basic Info** tab, you can update your name, add a profile photo, add your phone number, and select your time zone.



5. When you're done, click **Update**.

For information about managing your help desk identities, see Managing your identities.

Managing your identities

Your email address is your unique identity in the help desk. You use it to log in to the help desk and it is also used to identify who you are when you send email support requests to the help desk.

You can add more than one email address to your account if you'd like. You might do this if you want to use all your email accounts to request support via email. By adding all your email accounts to your user profile, the help desk can identify who you are when a new support request is received.

If you request support from an email address that has not been added to your user profile, a new help desk account is created, which you don't want. If this happens, you can create a support request asking that the new account be merged into your existing account.

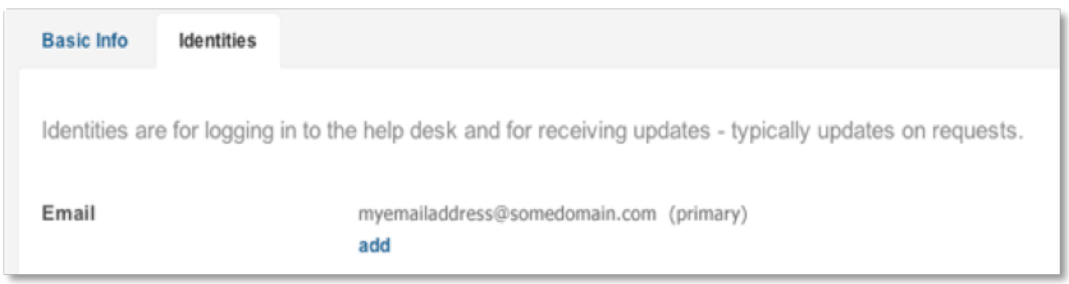
One of your email identities is set as the primary, which means that all communication from the help desk is sent to this address. After you've added additional email address identities, you can change the primary address to one of your other email addresses.

Adding additional email identities

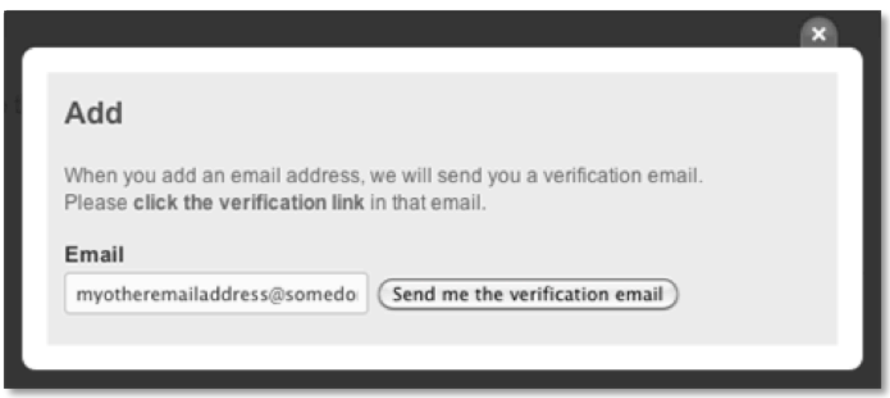
You can add additional email identities by updating your user profile.

To add other email addresses to your user profile

1. Log in to the help desk.
2. Click the **Profile** link (located above the menu bar).
3. Click Edit and then select the **Identities** tab.



4. To add another email address to your account, click **Add**.



5. Enter the new email address and then click **Send me the verification email**.
6. Open your email application and the verification email and then click the link to verify the new email address.

All of your identities use the same help desk password. When you add additional email addresses to your user profile, you can log in to the help using the new email address and your help desk password.

Changing your primary identity

After you've added another email address, you can select it as the primary address for your account. The primary address is where all communication from the help desk is sent.

To change your primary identity

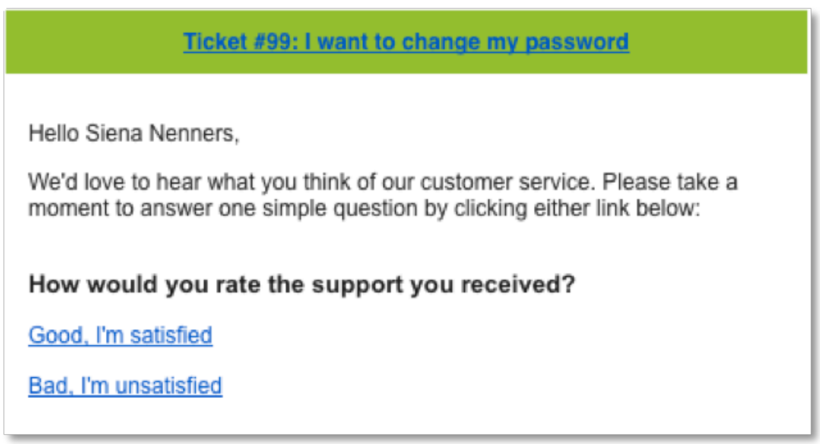
1. Select the **Identities** tab in your user profile.
2. Select a new email address from the **Primary Email** list.

The email address you selected is marked as the primary identity.

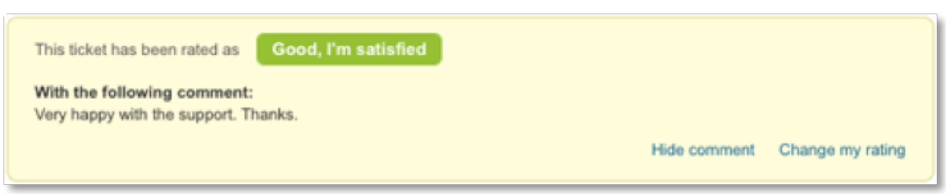
Rating the support you received

When your support request has been solved, you may be asked to rate the support you received. If you're asked, you'll receive an email soon after your support request has been set to Solved.

You have two options for rating the support you received, as shown here:



When you click either of the links, the satisfaction rating page is displayed in your web browser. You can then also add a comment explaining your rating, if you'd like.

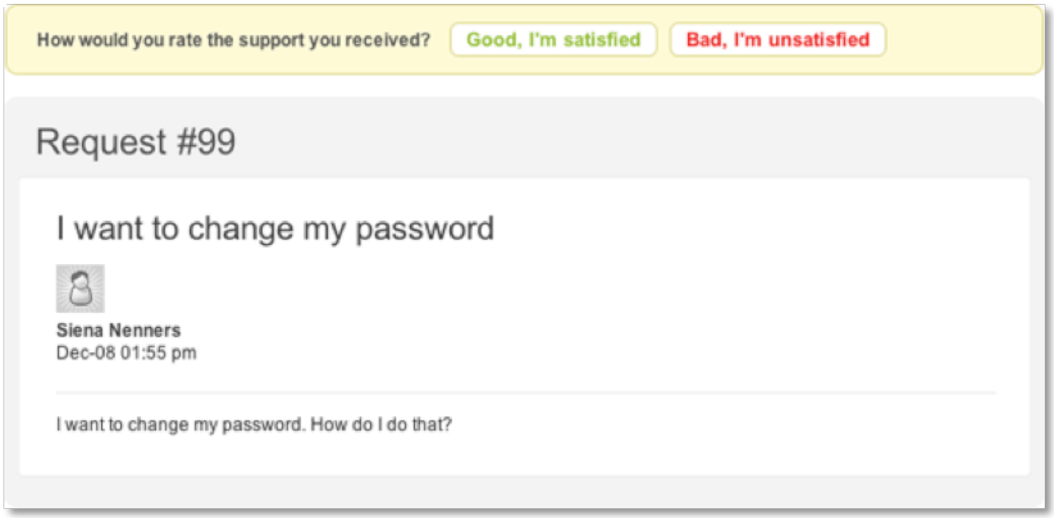


You can change your rating until the request is closed. Requests are usually closed several days after they have been set to Solved. If you rate your support as **Bad, I'm unsatisfied** you may be contacted again by the agent to see if they can do something to improve your experience.

You can also rate your solved requests by logging in to the help desk and viewing your existing support requests.

How to rate requests (or change a rating) in the help desk

1. Log in to the help desk and select **Check your existing requests**.
2. Select the **View your recently solved and closed requests** link.
3. Select a solved (but not closed) request that you want to rate.



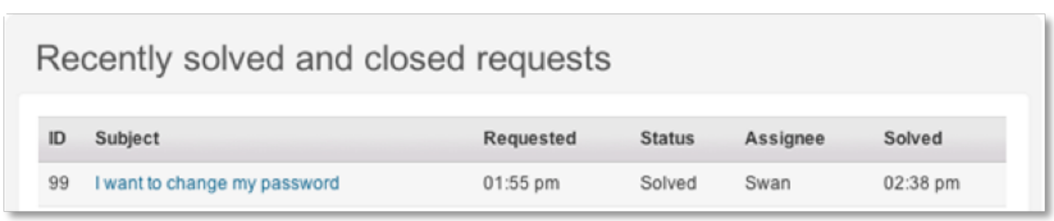
4. Select either **Good, I'm satisfied** or **Bad, I'm unsatisfied**.
5. Enter a comment if you'd like and then click **Save My Rating**.

Reopening a solved request

Soon after a request is solved it is closed, meaning that the request cannot be reopened (you can however create a follow-up request to a closed request, see Creating a follow-up request for a closed request). While the request is solved and not closed, you can reopen it by adding a comment to it.

How to reopen a solved request

1. Log in to the help desk and select **Check your existing requests**.
2. Select the **View your recently solved and closed requests** link.
3. Both solved and closed requests are shown in the list. Select the solved request that you want to reopen.



4. Add a comment to the request explaining why it's not resolved.
5. Click **Submit**.

Doing this reopens the request and the assigned agent will contact you for more information if needed and attempt to resolve the request again.

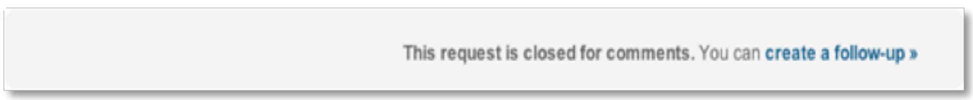
You can also reopen a solved request using email. Just reply back to the email notification you received that informed you that the request was solved.

Creating a follow-up request for a closed request

While you can't reopen a closed request, you can create a follow-up request to a closed request. Doing so creates a new request that references the closed request. Your support agent can then refer to the closed request for background information for your new request.

How to create a follow-up request for a closed request

1. Log in to the help desk and select **Check your existing requests**.
2. Select the **View your recently solved and closed requests** link.
3. Both solved and closed requests are shown in the list. Select the closed request that you want to create a follow-up request for.
4. Select **Create a follow-up**.



5. A new follow-up support request is created. Enter all the required information and click **Submit** to create the follow-up request.

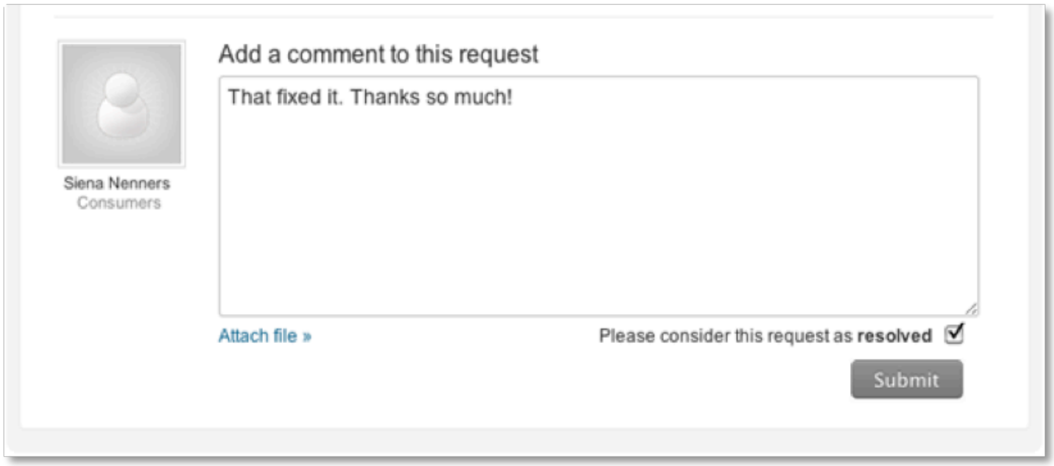
You'll receive an email message confirming your new support request.

Resolving your requests yourself

Both you and the agent assigned to your support request can mark a request as solved. This can happen when either of you determine that the issue has been resolved. If you want to mark a request as solved, you can do so by adding a comment to the request and also selecting the **Please consider this request as resolved** option.

To resolve a support request

1. Log in to the help desk.
2. Select either the **Check your existing requests** link or the link to your profile.
3. Locate the request you want to resolve.
4. Add a new comment and also click the **Please consider this request as resolved** checkbox.



You'll receive an email confirming that the request was resolved.

Viewing and searching your organization's requests

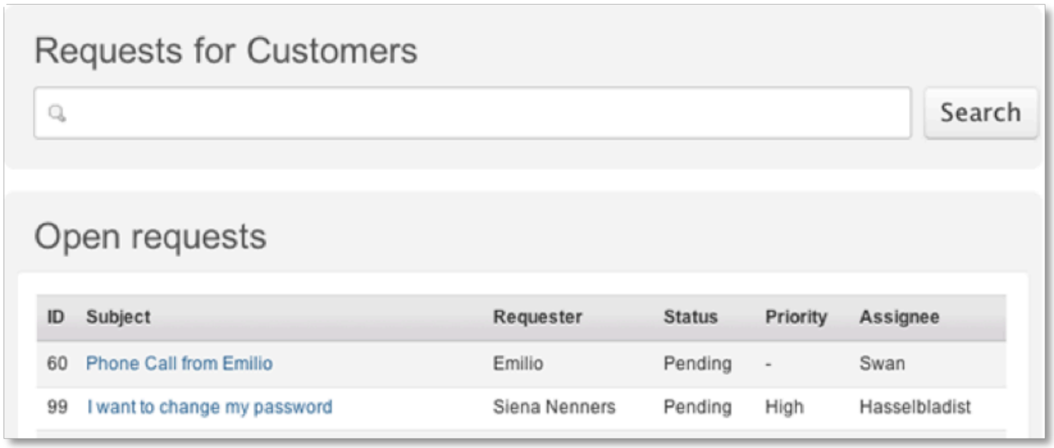
If your user account belongs to an organization, you can view all of the support requests from all other users in that organization.

If you belong to an organization, an organization tab is added to the menu bar in the help desk.

You can view and possibly add comments to the support requests of other members of the organization to which you belong. This provides everyone in the organization with insight into shared support issues. By checking your organization's requests, you may find that someone else has already reported a support issue that you're having. If so, you may not need to create a support request yourself. Instead, you can follow the request to its resolution.

How to view your organization's support requests

1. Log in to the help desk.
2. Click the link to your organization's requests (as shown above).

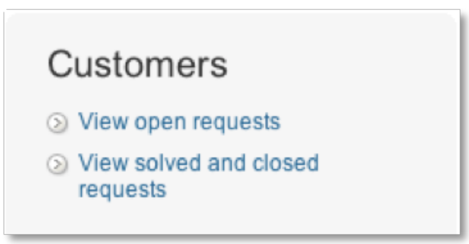


3. All of your organization's requests are displayed. To view a request, click its title. You can also search requests for specific words and keywords (see Searching support requests) below.

To sort the list by any of its columns, click the title of the column. For example, you can sort the list by priority by clicking **Priority**.

Viewing requests by status

You can view your organization's requests by status.

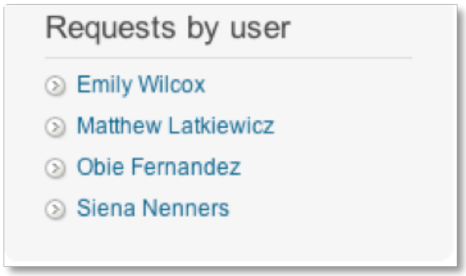


Open requests include those that have a status of Open or Pending.

When viewing your organization's solved and closed requests, you can create follow-up requests to your own requests just as you can when viewing your requests in your user profile or clicking **Check your existing requests** in the menu bar (see Reopening a solved request and Creating a follow-up request for a closed request).

Viewing requests by users

You can also view the support requests of other people in your organization.



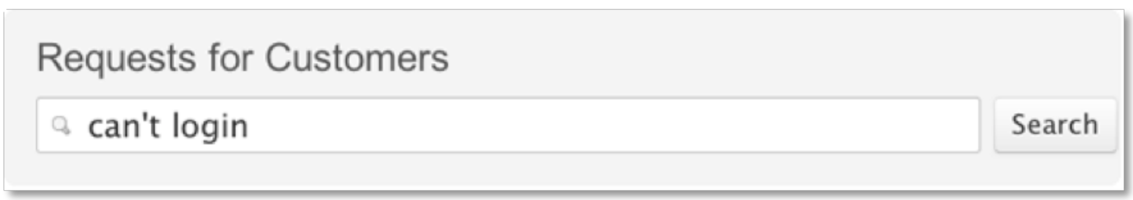
Just click a person's name and you'll see all of the requests that they have made.

Adding comments to requests

You may be able to add comments to your organization's requests. You might do this if you're having the same issue and have some additional information to provide. Just select the request and add your comment. Your user account is not then associated with the request. In other words, you won't be notified when updates are made to the requests.

Searching support requests

You can search all of the support requests in your organization. You can do this either by simply searching for words that might be contained in requests (for example "can't login") or you can search using the properties in a support request. For example, you can search for all requests that have a Priority of High.



The following table describes the keywords you can use to search properties in support requests. You can use these in combination with search operators such as less than (<) and greater than (>). For more information about these search operators, see Search operators below.

Keyword	**Description**
Request ID	To search for a request by its ID number, just search for the number. `233`
`created`	The date you created a support request. `created:2011-05-01`
`updated`	The date of the most recent update to a request. `updated>2011-05-15`
`solved`	The date the request was set to solved. `solved<2011-06-01`

Keyword	Description
assignee	The name of the agent assigned to the request. You can search for people using a partial name, their full name, or their email address: assignee:susan assignee:"Susan Warren" assignee:"susan@somedomain.com"
requester	The person who made the support request. You can use this to quickly locate all your requests or the requests of other people in your organization. To search for all your requests, use this: requester:me You can search for other people's requests using a partial name, a full name, or an email address.
subject	The text in the request's subject. subject:"upgrade account"
description	The text in all the request's comments. description:defective
status	New, Open, Pending, Solved, Closed. status<closed For an explanation of what these statues mean, see Tracking your support requests.
ticket_type	Question, Incident, Problem. ticket_type:problem
priority	Low, Normal, High, Urgent. priority>low
commenter	People who have added comments to requests. A commenter can be yourself, another person in your organization, or a support agent. To search all requests that you added comments to, use this: commenter:me You can search for other people's requests using a partial name, a full name, or an email address.
cc	People who have been CC'd on requests. To search all requests that you have been CC’ed on, use this: cc.me You can search for other people's requests using a partial name, a full name, or an email address.

Search operators

The following search operators can be used to build your search statements.

Operator	Description
:	The colon indicates that the given field should equal the specified value. `status:open`
<	Less than. `status<closed`
>	Greater than. `priority>normal`
" "	Double quotes. This is referred to as a phrase search and returns the exact words in the exact order. `subject:"Please upgrade my account"`
-	Minus sign. This is used to exclude a word (or property value) from a search. For example, the following search statement excludes an agent from the search results: `status:pending upgrade -account`
+	You use the plus operator to indicate that you only want results for the word or words you're searching for (in other words, an AND search). For example, if you wanted to search for requests from users that want to upgrade their account, you can use a search statement like this: `+upgrade +account` This search only returns results for requests that contain both of those words. In other words, both are required.
*	The wildcard operator is useful when you want to search various forms of a word. For example, searching for `photo*` returns results that would include photography, photographer, photograph and any other words that began with 'photo'. However, because of the performance issues involved with doing wildcard searches, unqualified wildcard searches are not currently supported. In other words, you need to use a property keyword to make your search specific to the data you're trying to locate. `subject:photo*`

Ordering and sorting request search results

Search results can be ordered and sorted using the `order_by` and `sort` keywords.

You need to use both of the keywords together in a search statement, as in this example:

```
status:new order_by:updated_at sort:asc
```

Here are the valid sorting and ordering keywords that you can use:

- sort:asc
- sort:desc
- order_by:priority
- order_by:status
- order_by:ticket_type
- order_by:updated_at
- order_by:created_at